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## Zetafax 2012 Configuration Help

Fax software solutions for business

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**ZETAfax**®

Point. Click. Fax.

# **Zetafax 2012 Configuration Help**

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Printed: 2012

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# Welcome to the Zetafax 2012 Configuration Help

The Zetafax Configuration program allows the setup, day-to-day maintenance and administration of your Zetafax system.

Click a link to find out more about how to set up and manage Zetafax:

[\*\*Zetafax Configuration\*\*](#)

[\*\*Zetafax users\*\*](#)

[\*\*Devices\*\*](#)

[\*\*Email Gateway\*\*](#)

[\*\*Zetafax Server\*\*](#)

[\*\*Server Virtualisation\*\*](#)

If you cannot find the help you are looking for, please refer to the Equisys website [www.equisys.com](http://www.equisys.com).

For technical support, visit the Equisys support pages, [www.equisys.com/support](http://www.equisys.com/support).

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## Legal Information

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## Zetafax 2012 - basic concepts

Zetafax allows any users on a network to send and receive faxes via a central Zetafax Server.

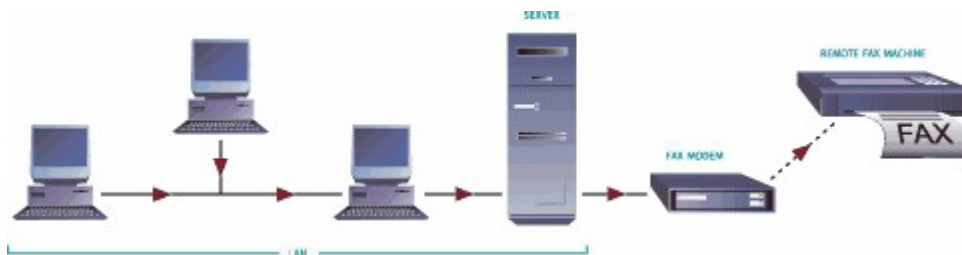
Faxes are sent and received using fax modems, or intelligent fax boards attached to the network through the Zetafax Server. Faxes can be printed to any network printers. Paper documents can be scanned in and faxed using a scanner connected to any machine running the fax client or a scanning device attached to the network.

As with any other device on the network used for shared storage or communications, a networked fax modem, or intelligent fax board requires a server. We refer to this, naturally enough, as the Zetafax server. If your installation has a file server or workstation running Windows 7, Windows Vista, Windows XP Professional, Windows Server 2012, 2008 or 2003 the Zetafax Server can usually be run on the same computer.

Alternatively, if you have a single fax line for up to around 25 users (send only) the Zetafax Server software can run as a Windows application in the background of a Pentium workstation. With more than one fax line, or more than 25 users, we recommend that the Zetafax Server is run on a separate machine under Windows Server 2012, 2008 or 2003.

The Zetafax files themselves can be stored on any file server on the network that can be accessed by both the Zetafax Server and clients. Thus, the Zetafax Server, Zetafax client, and file storage can all be on different computers.

The supported fax modems and intelligent fax boards on the network are connected to the Zetafax Server computer. The following diagram shows this set up on part of a network.



*A non-dedicated Zetafax Server - typical with Windows 7, Windows Vista, Windows XP Professional, Windows Server 2012, 2008 or 2003.*



## Getting Started

---

Welcome to the online help files for the Zetafax configuration program. This help manual is designed to help you make the most of your Zetafax system.

Zetafax has been designed for easy installation and includes configuration wizards to ensure you get up and running quickly. The checklist below will ensure that you take advantage of the rich features built into your Zetafax system.

### Install and configure the Zetafax Server

Log onto a server as a Domain Administrator. Insert the Zetafax CD ROM and run the Zetafax Server installation. You will be prompted for the product license number which is located on the back of the CD case. Once the installation is complete open the Zetafax Configuration program. The Configuration Wizard will guide you through the rest of the Zetafax setup.

[Click here if you require additional help.](#)

### Test and register the Zetafax Server

Once you have completed the configuration, launch the Zetafax Server from the Zetafax program group. In order to test and register Zetafax you will need to install the Zetafax Client. To do this, use the short cut from the Start Menu. Once installed, select 'Actions, New, Fax', then address and send the fax.

After the fax has been sent you will be prompted to register your Zetafax system.

[Click here if you require additional help.](#)

### Roll out the Zetafax Client software to users' desktops

Log onto each user's desktop as a user with local administration rights. Browse to the default Zetafax Server system share \zfax\SYSTEM and run WKSETUP.EXE. Follow the instructions on screen to install the Zetafax Client. If you have many users to install, use Windows Group Policy to deploy the Zetafax Client centrally.

[Click here if you require additional help.](#)

[Click here for information on using Group policy.](#)

### Faxing from email

To send and receive faxes from Microsoft Outlook follow these additional steps:

- [Using Microsoft Exchange 2010](#)
- [Using Microsoft Exchange 2007](#)
- [Using Microsoft Exchange 2003](#)
- [Using Lotus Notes](#)
- [Using SMTP](#)

### Advanced features

The following options are available if you would like to extend your Zetafax system further:

#### Routing received faxes to users' desktops

To route inbound faxes you will require an Intelligent Fax Board and a range of direct inward dial (DID) fax numbers.

[Click here for more information.](#)

#### Send faxes directly from Microsoft Office

Install the Microsoft Office Addins for simplified faxing from Word, Excel and PowerPoint. [Click here for](#)

[more information on sending faxes from Microsoft Office.](#)

#### Using Zetafax on your Notebook

Install the Notebook option to use Zetafax when you are on the road.

[Click here for more information.](#)

#### Using Zetafax over your Intranet

The Zetafax Web Client allows you to send and receive faxes using your web browser.

[Click here for more information.](#)

#### The Zetafax API Toolkit

(available as an add-on)

The optional Zetafax API Toolkit makes it easy to fax-enable existing applications and to automate the process of faxing.

[Click here for more information.](#)

#### Fax via email support for Lotus Domino and SMTP Mail Servers

The Zetafax Email Gateway can be used with Lotus Notes and most SMTP Mail Servers. These are configured using the Zetafax configuration program.

[Click here for more information.](#)

### Add-ons

Zetafax for Networks starter systems can be enhanced with the following optional features:

**Software Assurance** – provides access to software version upgrades without further charge for one year (included in certain countries with the Zetafax Business Edition and in all countries with the Zetafax Corporate Edition).

**Additional user licenses** – for complete flexibility and scalability

**Additional line license for fax or SMS** – when adding more users or to support increasing fax volumes

**API Toolkit** – for embedding Zetafax functionality into any application

**SMS Gateway** – for sending text messages from the Zetafax Client

**Document Conversion** – converts over 225 file types to TIFF fax format without the need to install the authoring application on the Zetafax Server

**Corporate Edition feature upgrade** – enhances the Business Edition with all the extra features of the Corporate Edition \*

\* excludes Software Assurance

### Services

Equisys and its partners can install and configure your Zetafax for Networks system and your choice of hardware on site. User and administrator training is also available. Please contact Equisys or your Zetafax for Networks distributor for details.



## Assessing your needs

---

Zetafax can be set up in a number of different ways depending on what system you are running and how you intend to use it.

The first step in installing your Zetafax system should always be to set up the Zetafax Server.

[Click here for instructions on how to do this.](#)

Having successfully installed the Zetafax Server, and tested it, we recommend taking a few minutes to answer the following questions before beginning to install the extra components:

### How many people in your organization require fax software?

If the answer is more than 10, it is worth considering installing your Zetafax Client using Group Policy.

[Click here for instructions on how to do this.](#)

### How will faxes be sent?

Directly from Microsoft Office applications - such as Word and Excel.

[Click here for instructions on how to install the Office addins.](#)

Directly from email software - such as Microsoft Outlook, Lotus Notes

[Click here for instructions on setting up the email gateway](#)

From specialized or departmental software programs or databases - e.g. CRM or accounting software or using Access, Visual Basic, C/C++ etc

[Click here for more information about using the Automation Toolkit](#)

In bulk, using mail merge - fax broadcasts

[Click here for information about Fax Broadcast](#)

From paper originals - replacing fax machines

[Click here for help setting up a scanner](#)

### Who will receive faxes on screen?

One person receives all faxes on behalf of everyone

All or some users receive all faxes

All or some users will have personal DDI fax numbers to receive their own faxes

### Do you have any special requirements when you receive faxes?

On a printer - using a printer on your network

[Click here to enable automatic printing](#)

On an existing fax machine - i.e. use fax software for sending faxes only

### Do you intend to run your Zetafax Server in a virtual environment?

Using Server Virtualisation

[Click here for details of the potential benefits of installing your Zetafax Server in a virtual environment.](#)

### Do you have any additional requirements?



Select all that apply:

Allow users to send text messages from their PC screen

[Click here for information on how to set up your GSM modem.](#)

Use fax software from more than one location in wide area network.

[Click here for information on setting up least cost routing.](#)



## Zetafax 2012 - Installation

---

Welcome to Zetafax! This section explains the structure of this guide, including the suggested minimum reading for new users.

This document guides you through installation and configuration of Zetafax, and the sending of a fax or text message using the **Zetafax Client**.


If you want to install the product straight away, please turn to the chapter [Installation overview](#) for information about installing Zetafax.

### Minimum reading

If you are a user, we recommend that you read the chapters *Getting started with the Zetafax Client*, *Sending a simple fax*, and *Sending a text message* as a minimum. These give you enough information to prepare and send a simple fax. For further guidance, click the **Help** button anywhere in the Zetafax Client to display the *Zetafax Client* help.

If you are a system administrator, you should read the installation and configuration chapters, which will give you a good knowledge of how the **Zetafax Server** works. We suggest that you also read *Getting started with the Zetafax Client*, and briefly review the rest of the manual, so you can answer questions or refer users to the relevant sections.

For more advanced information on how to make the most of your Zetafax system – such as faxing from your email client, using intelligent fax boards for high-volume faxing, or fax-enabling your business applications using the Zetafax API – refer to the *Zetafax Configuration* online help.

- To display the help, click the **Help** button  in the Zetafax Configuration program toolbar or from the Zetafax CD menu, select **Documentation**, then **Zetafax Configuration Help**.

In the online help, you will find comprehensive information on:

### Zetafax Users

This section explains how to add, modify and delete Zetafax user accounts.

### Devices

This section explains how to set up and use intelligent fax boards and network scanning devices.

### Email Gateway

This section provides installation and configuration instructions to enable users to send faxes via Microsoft Exchange, Lotus Domino and SMTP email systems.

### Zetafax Server

This section explains how the Zetafax Server works including administration utilities, Automatic Inward Routing (for automatically delivering faxes directly to a user's Inbox) and Least Cost Routing (enabling you to route faxes between two or more Zetafax Servers in different locations).



## Introduction

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In this section, you can learn:

- [What Zetafax is and how you can benefit from it.](#)
- [What requirements you need to install and set up a Zetafax system.](#)
- [How you can contact Equisys and obtain technical support.](#)



## What is Zetafax?

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Zetafax is a versatile network fax software solution for business. Used by over 60,000 companies in 100 countries, Zetafax allows you to send and receive faxes and SMS messages from your desktop. It seamlessly integrates with business process applications, such as Microsoft Office, for fast, automated faxing from the desktop.

The **Zetafax Server** runs as an application on Windows Server 2012, 2008, 2003, Windows 7, Windows Vista and Windows XP Professional. It can also be run as a service. Zetafax integrates with Microsoft Exchange 2003 up to 2007, Lotus Domino R5 up to R8 and most SMTP email systems to allow you to send and receive faxes from within your email client.

The **Zetafax Client** application is available for Windows Server 2008, Windows Server 2003, Windows 7, Windows Vista, Windows XP Professional, Windows Terminal Services and Citrix MetaFrame. Additionally, you can use the **Zetafax Web Client** to send messages via Internet Explorer 5 or later. For extra flexibility, faxes can be automated and sent directly from Microsoft Office applications or using the API Toolkit, which offers five further methods for submitting messages.

### Who can benefit from Zetafax?

Today fax is still one of the most effective ways to send a message. The traditional fax machine, however, is outdated and not always secure. Companies see many hours wasted by employees standing over old-fashioned fax machines as they dial and transmit.

Whether your marketing department wants to send fax blasts to your customer base, or your accounts department needs to dispatch invoices and remittance notices quickly and efficiently, Zetafax does the job in a fifth of the time it takes using a conventional fax machine.

Faxing from your desktop using Zetafax is as easy as sending your document to a printer. Instead of being printed on paper, your document is converted into fax format ready to be sent. Additionally, you can choose to attach coversheets or overlay stationery, such as company logos or office letterheads.

Messages can be submitted directly to the Zetafax Server for immediate transmission or for delayed transmission as part of a batch process.

Zetafax is proven to save up to 80% of the time taken to send faxes conventionally, leading to cost savings that quickly repay your investment. IT administrators can further minimize faxing costs by controlling who is able to send faxes when and to where in the world. Costs can also be reduced using the Zetafax Least Cost Routing (LCR) module, allowing you to send faxes internationally for the cost of a local call.

Being in control of your faxing system is not just about keeping a check on costs. The ability to retrieve information quickly is an important consideration. Zetafax automatically archives all sent and received faxes, giving you easy access to all your messages, any time you need to view them. There's no longer the need to print out every fax which is then lost under a pile of paperwork.

Even before you archive your fax, you can view it in a number of ways. Zetafax gives you the flexibility to view faxes from your client window or your email inbox. Having a universal inbox gives you a fully integrated messaging solution. You can view, send and receive faxes all from one program.

Zetafax is the complete solution for organizations of any size, no matter how widely distributed your business or how sophisticated your fax requirements.



## Supported Platforms

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For the latest information of platforms supported by Zetafax go to <http://www.equisys.com/product/zetafax/supportedplatforms.html>



## Contact and support

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Equisys is committed to providing the highest level of support to customers and partners to help them with technical queries. We conduct regular customer satisfaction surveys to ensure we maintain these high support levels.

### Software Assurance

Software Assurance is our standard support contract, membership of the Zetafax Software Assurance Program protects your investment in Zetafax software. The Program automatically provides member customers with all software version upgrades and updates for a period of one year from the date of the agreement.

Software Assurance enables administrators to keep their systems up to date. It includes updates for new platforms and new versions of supported applications, as well as feature enhancements in new releases. It is the quickest, and cheapest way to get updates, which is why we include the first year as standard with all new Zetafax systems.

The Software Assurance Program is available for all Zetafax systems from 5 users upwards. One year's Software Assurance is included as standard in certain countries with the Zetafax Business Edition and in all countries with the Zetafax Corporate Edition.

### Software Maintenance

Software Maintenance is our premium support contract. It gives you telephone support and priority email support. It also includes automatic access to all updates and upgrades to the software. Software Maintenance is available in selected countries only. Please contact Equisys or your local distributor for further information.

### Hardware Assurance

Hardware Assurance enables you to protect yourself from hardware problems on all Brooktrout and Diva fax boards, including replacement hardware being available upon confirmation of a hardware failure. Using Hardware Assurance you can insure yourself against the costs and inconvenience to your business should a board fail, and also gain access to driver support and updates. Hardware Assurance is available in selected countries only. Please contact Equisys or your local distributor for further information.

### Obtaining technical support

Online support is available to all customers 24/7 through the Equisys *Knowledgebase*, which contains technical tips on how to get the most from your system, guides on implementation, and common fixes for known issues.

Equisys provides technical support through its offices in the United Kingdom and the United States and in other regions through its accredited distributors. You should contact your distributor for support availability. Contact details of your nearest Zetafax distributor can be found on <http://www.equisys.com/buy/index.html>.

Before contacting support directly, please read the online help and the relevant parts of this guide. Search the support pages, and especially the *Equisys Knowledgebase*, on the Zetafax web site at: <http://www.equisys.com/support>

Finally, contact the software supplier from whom you purchased the software. In most cases the supplier will be able to provide support.

When contacting your local support center, please have the following information to hand:

- Full description of problem
- Product version and license number
- Product server PC operating system
- Client PC operating system
- Network operating system (e.g. Windows Vista)
- Contact phone number, address and email

Feel free to contact Equisys (or any of our distributors) with any comments or suggestions you may have about the software or the *Installation and Configuration Guide*.

## Contact

### ***Equisys plc***

#### **Sales**

Tel +44 (020) 7203 4001  
Fax +44 (020) 7203 4005  
[sales@equisys.com](mailto:sales@equisys.com)

<http://www.equisys.com>

#### **Technical support**

Tel +44 (020) 7203 4002  
Fax +44 (020) 7203 4005  
[support@equisys.com](mailto:support@equisys.com)

### ***Equisys Inc (USA and Canada)***

#### **Sales**

Tel (770) 772 7201  
Fax (770) 442 5789  
[sales@usa.equisys.com](mailto:sales@usa.equisys.com)

#### **Technical support**

Tel (678) 942 7250  
Fax (770) 442 5789  
[support@usa.equisys.com](mailto:support@usa.equisys.com)



## Server Virtualization

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Until now, the major barrier to deployment of a fax service on a virtual server has been the need to provide access to a hardware fax board. Although there are a number of workarounds, none of these allowed the full realisation of all the potential benefits a virtual server environment. With the adoption of the Zetafax FoIP Connector there is now no longer a hardware component involved, and you have complete flexibility in the deployment and operation of the Zetafax server.

Zetafax now supports Server Virtualisation for the latest details on how to configure your Zetafax server in virtual environments please go to <http://www.equisys.com/products/zetafax/Virtualization.html>.

### **Related topics**

[Configuring Brooktrout devices for use in Zetafax Server](#)

[Installing the Zetafax FoIP Connector \(SR140 Edition\)](#)

[Installing the Zetafax FoIP Connector \(Standard Edition\)](#)

[Fax Over IP FoIP](#)





## Installation overview

You can use Zetafax in many different configurations. As a result, it consists of many elements that you can choose to install depending on how you intend to use Zetafax. Most items are optional and you should only install them if you plan to use their functionality. The only compulsory element is the **Zetafax Server**.

### Server-side elements:

- Zetafax Server
- Zetafax Connector for Exchange
- Zetafax SMTP Server
- Zetafax Options for Lotus Notes
- Zetafax Web Client

### Client-side elements:

- Zetafax Client Applications consisting of the Zetafax Client, FaxBroadcast, Outlook Integration, Microsoft Office Addins for Word and Excel.

### Development/ISV Tools:

- Zetafax API Toolkit

The most important component of Zetafax is the Zetafax Server, which processes the sending and receiving of faxes. Regardless of how you intend to use Zetafax, you must install the Zetafax Server first.

This document gives you all the information you need to install and configure the Zetafax Server for basic faxing.

In order to implement your Zetafax system successfully, you need to complete these steps:

1. Install and configure the **Zetafax Server**.  
For more information, see [Installing the Zetafax Server](#) and [Configuration Wizards](#).
2. Roll out the **Zetafax Client Applications** software to users' desktops.  
See [Installing the Zetafax Client Applications](#).

If you want to extend your system to fax from Microsoft Outlook, you need to complete these additional steps:

1. Install the **Zetafax Connector** for Microsoft Exchange.  
See the [Email Gateway topics](#)
2. Configure the **Zetafax Email Gateway** for Microsoft Exchange.  
See the [Email Gateway topics](#)

## Summary

The Zetafax installation program adds all the necessary components to install the Zetafax Server on a system.

When either the Zetafax configuration program or the Zetafax Server is started for the first time, a configuration wizard guides you through the necessary steps to set up your system to send and receive faxes.

These include:

- Licensing and automatic registration of your software.

- Making Zetafax available to users on your network.
- Enabling network users to use Zetafax.
- Adding your fax devices and printers.

These stages are described in more detail in the [Configuration Wizards](#) section.

Once you have completed the configuration wizards, you can use the **Zetafax Configuration** program to edit settings.

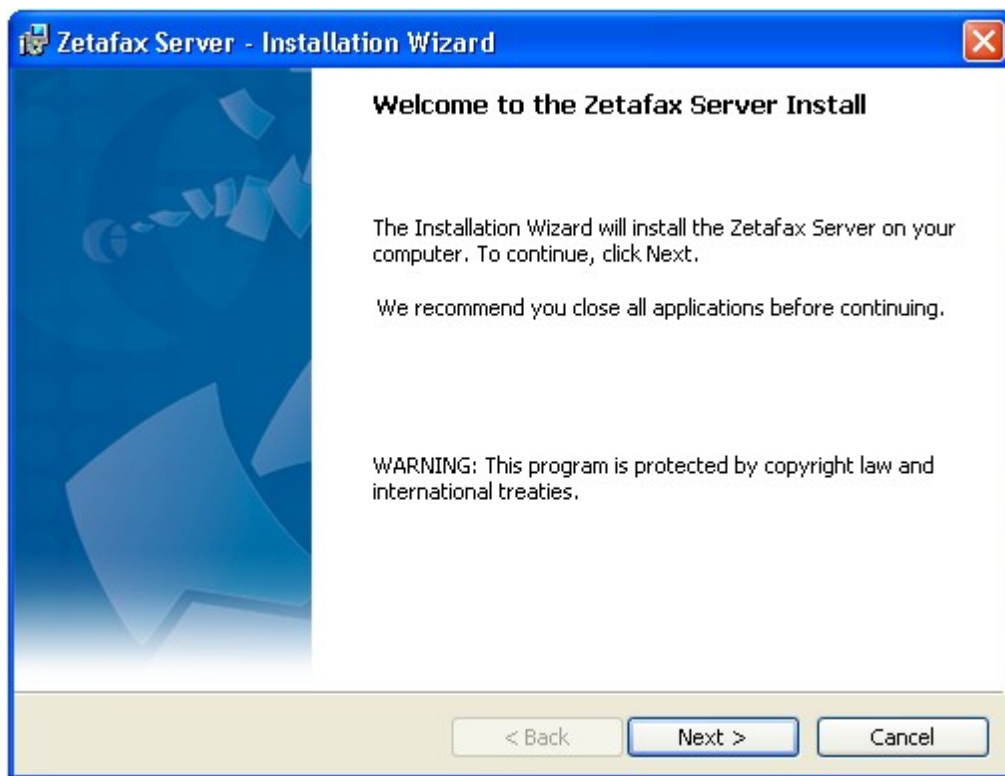


## Installing the Zetafax Server

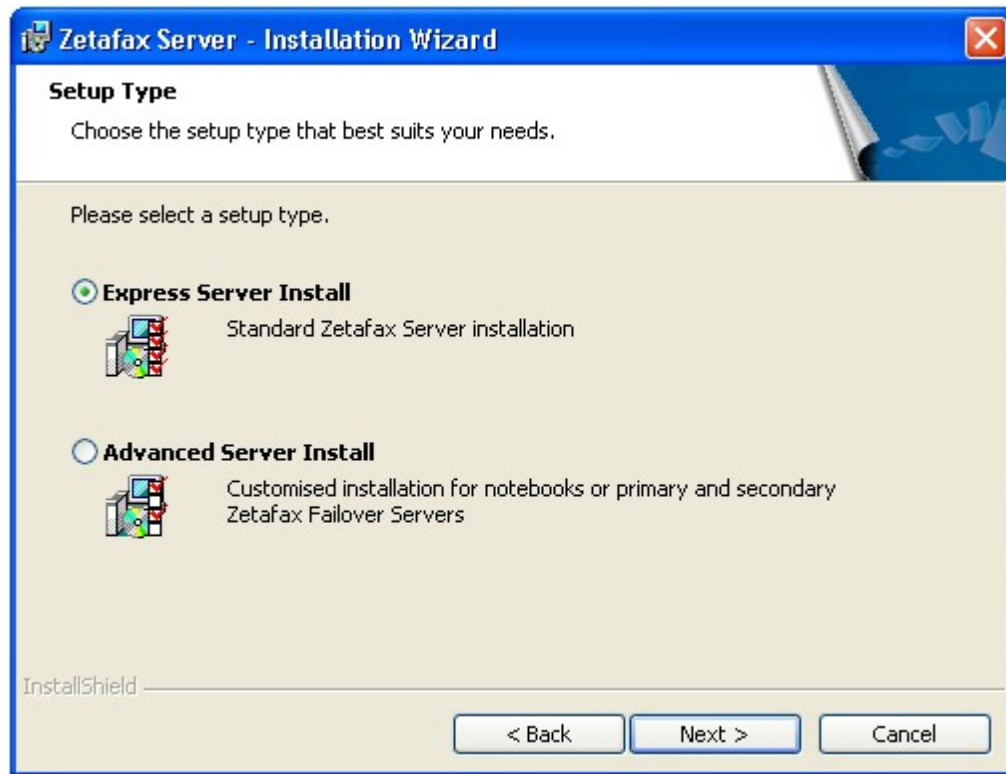
We recommend that only an IT administrator should perform the Zetafax Server installation.

### To install the Zetafax Server:

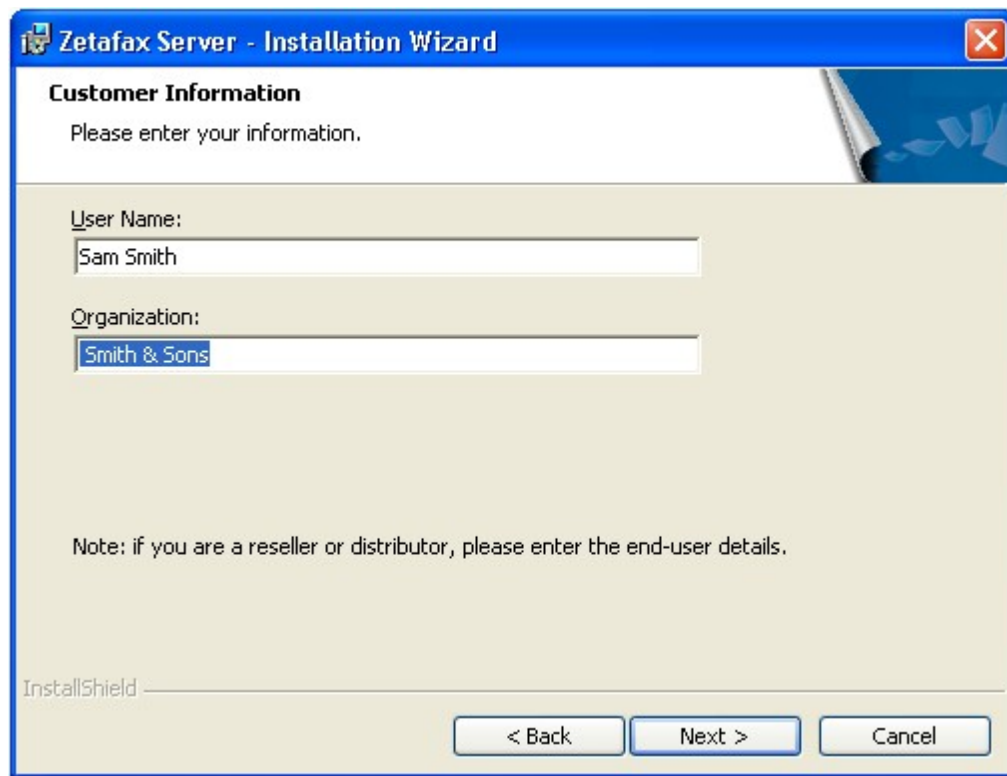
1. Log on to the server as a user with domain administrator rights.
2. Insert the Zetafax CD into your CD-ROM drive. The CD should run automatically. If this fails, click **Start**, select **Run** and enter the install program's path ('D:\SETUP.EXE', where D is the letter of your CD drive).
3. Select **Install Zetafax** and then **Zetafax Server** to begin installing the Zetafax Server. The **Zetafax Server Install Wizard** starts:



4. When presented with the **Zetafax Server Welcome** dialog, click **Next**.



5. Select the **setup type** you require: **Express server install - standard Zetafax Server installation**, (or [Advanced Server install](#) - Customized installation for notebooks or primary and secondary Zetafax Failover Servers). Click **Next**.
6. When the license agreement is displayed, review the terms and select **I accept the terms in the license agreement**. Click **Next** to continue the installation.



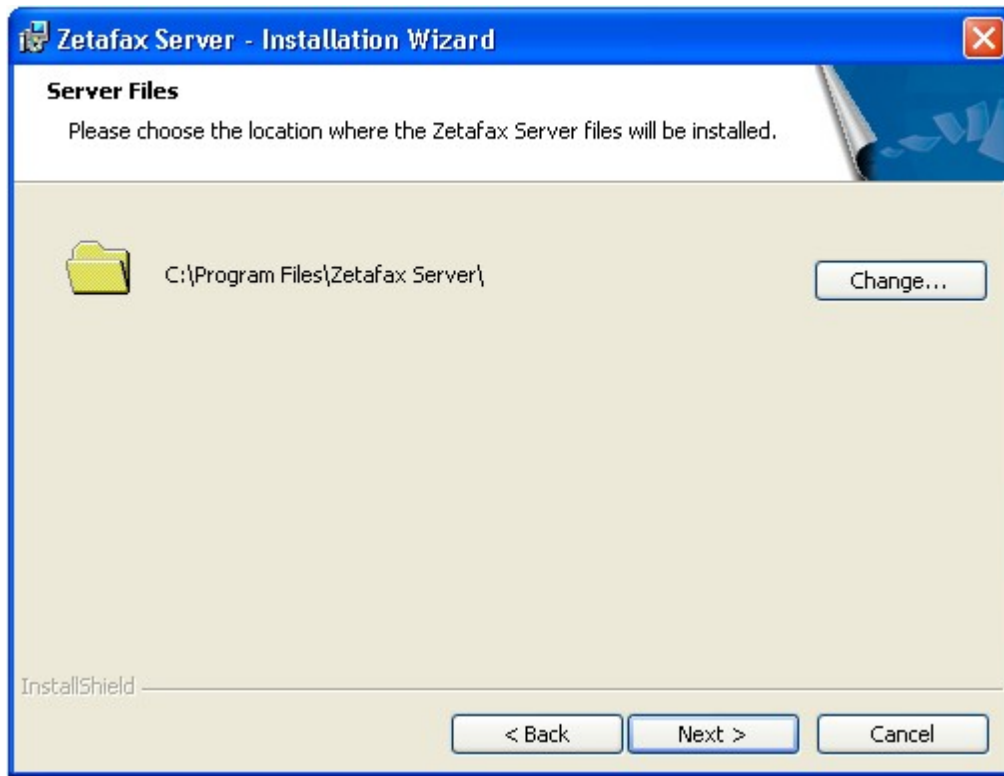
The image shows a Windows-style dialog box titled "Zetafax Server - Installation Wizard". The window has a blue title bar with a close button (X) in the top right corner. The main content area has a light beige background. At the top, it says "Customer Information" in bold, followed by "Please enter your information." Below this, there are two text input fields. The first is labeled "User Name:" and contains the text "Sam Smith". The second is labeled "Organization:" and contains the text "Smith & Sons". Below the input fields, there is a note: "Note: if you are a reseller or distributor, please enter the end-user details." At the bottom left, the "InstallShield" logo is visible. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

6. Next, you are prompted for your username and organization. This dialog is populated automatically based on the server's Windows settings - check that the details are correct:

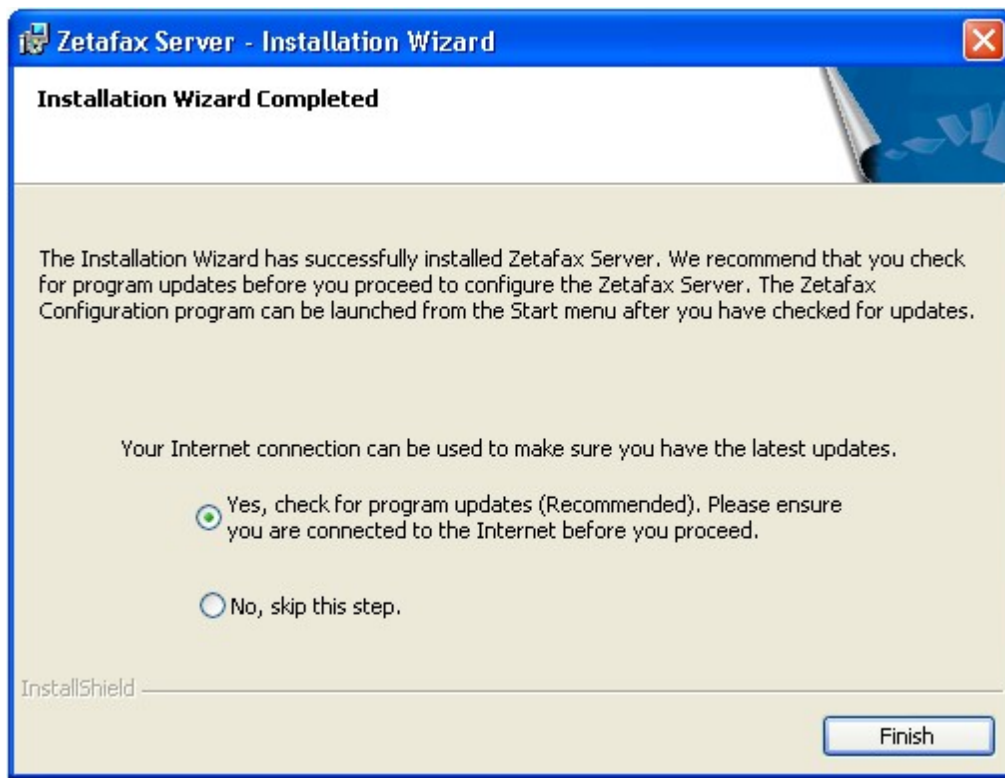
**User name:** The name of the person responsible for Zetafax in your organization. Equisys uses this name for support and registration purposes, so the real name of the administrator is more helpful than a non-specific term, for example, "Administrator".

**Organization:** The full, official name of your organization. The name entered here is used in the header of all outbound faxes. An incorrect company name will lead to problems if you need to re-register the product and may affect your entitlement to support.

7. Click **Next** to continue.
8. If this is the first time you have installed Zetafax on this server, you are prompted for your starter license number. This is displayed on the Zetafax product packaging.
9. If upgrading from a previous version of Zetafax, you are prompted to enter your upgrade license.
10. Click **Next** to continue.
11. In the next dialog, select the location where the Zetafax Server program files and user faxes will be stored. Accept the default location or click **Change...** to select a different location. Click **Next** to continue.



11. If you are happy with the settings you have chosen, click **Install** to install the software.
12. At the end of the Zetafax Server installation, this dialog is displayed:



The Zetafax Server software is now installed. We recommend that you now check to see if there are any program updates available.

- To do this select the **Yes, check for program updates** option
- Click **Finish** to exit the Zetafax Server Install Wizard.

If there are updates available, follow the on screen instructions to download and install them.

Once you have installed the Zetafax Server and any updates, we recommend that you configure the server, install the Zetafax Client and test the system before installing additional components, such as the Exchange Connector. You can find details of how to configure the Zetafax system in the next section.

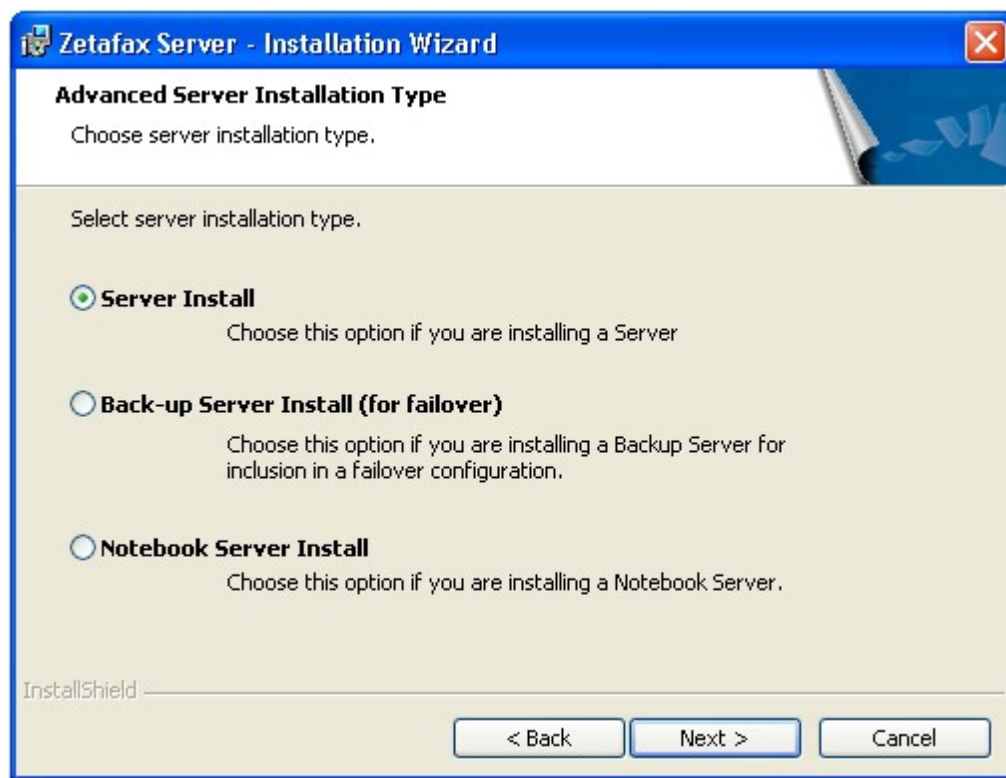
**Related Topic:**  
[Advanced Server Install](#)



## Advanced Server Install

If you require customized installation for notebooks or primary and secondary Zetafax Failover Servers, then you need to select **Advanced Server Install**, when installing the Zetafax Server.

You have to select the **Server Installation type** on the Advanced Server Installation type screen:



- **Server Install** - if you are installing a server

This is similar process to the [Express Server Install](#). The only difference here, is you have to choose the location where the Zetafax Server shared data will be installed.

- **Back-Up Server Install (for failover)** - if you are installing a Back-Up Server for inclusion in a failover configuration

For more information on how to install a Back-Up Server, please click on the links below:

[Installing a failover system](#)

- **Notebook Server Install** - if you are installing a Notebook Server.

The Zetafax Server comes with the option to install a copy onto a notebook computer, so you can send and receive faxes while away from the office. When you start the Zetafax Client, it automatically detects if your PC can connect to a network fax server. If not, a version of the Zetafax Server can be run locally, using the fax modem in your PC.

For more information please click on the link below:

[Installing the Zetafax Server on a notebook computer](#)





## Configuration wizards

Zetafax has a number of easy-to-use wizards to help you quickly step through basic configuration. The Zetafax configuration wizards will automatically start up the first time either the Configuration program or the Server program is run.

The configuration wizards launched are:

- [License and Registration Wizard](#)
- [Share Zetafax Folder Wizard](#)
- [Add User Wizard](#)
- [Device Configuration Wizard](#)

Zetafax automatically launches the next wizard as you complete each one in turn.

### Starting the configuration wizards

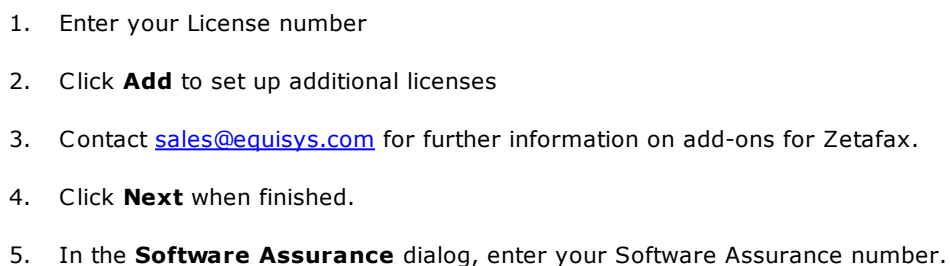


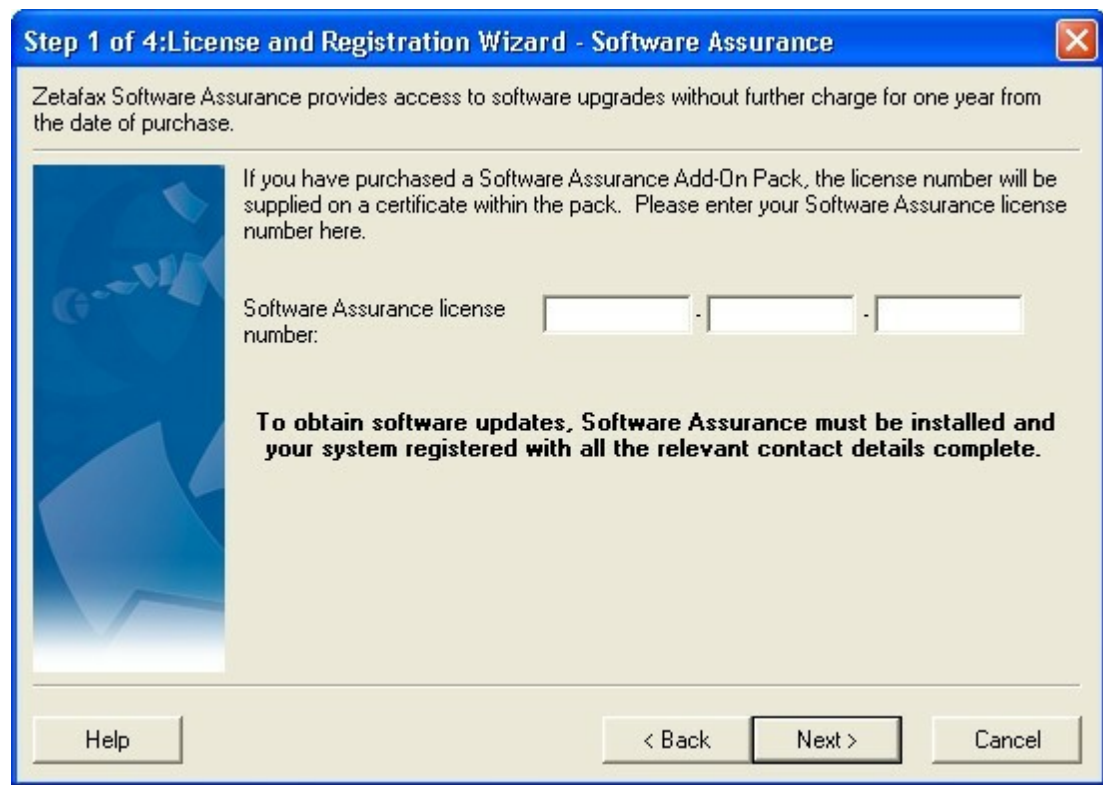
Click **Next** to start configuring Zetafax.

### License and Registration Wizard

The **License and Registration Wizard** allows you to set up additional licenses and to configure the details that will appear on your registration. You can purchase licenses for additional users, additional lines, API functionality, or integration with third-party products.

When the wizard launches, the **License number** dialog is displayed.

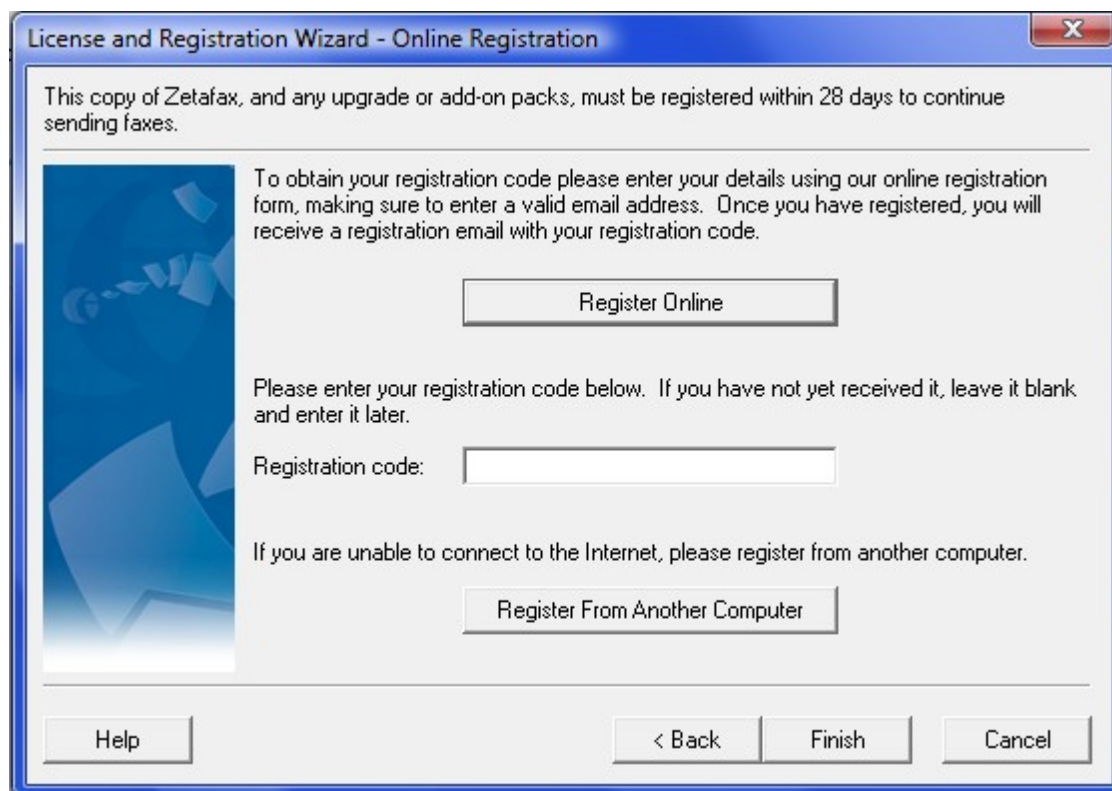




Software Assurance entitles you to free upgrades for one year. If you have a Software Assurance license, you must register it here to be eligible for free upgrades. See [Software Assurance](#) for more information.

#### License and Registration - Online Registration

Copies of Zetafax 2012 and any associated upgrade or add-on packs require the registration to be completed within 28 days to be able to continue sending faxes. You will be prompted to register your copy if you have not done so, this will open up the License and Registration Wizard, it offers you two methods of registering depending on whether the machine you are using has an internet connection. If the machine lacks access to the internet it is possible to register your copy of Zetafax from another machine.



### Registering from another computer

To register your copy of Zetafax from another computer, select the **Register from Another Computer** button. This will open up a dialogue box containing the details necessary to perform a registration from another machine, copy these details and follow the instruction detailed below from a computer with internet access.

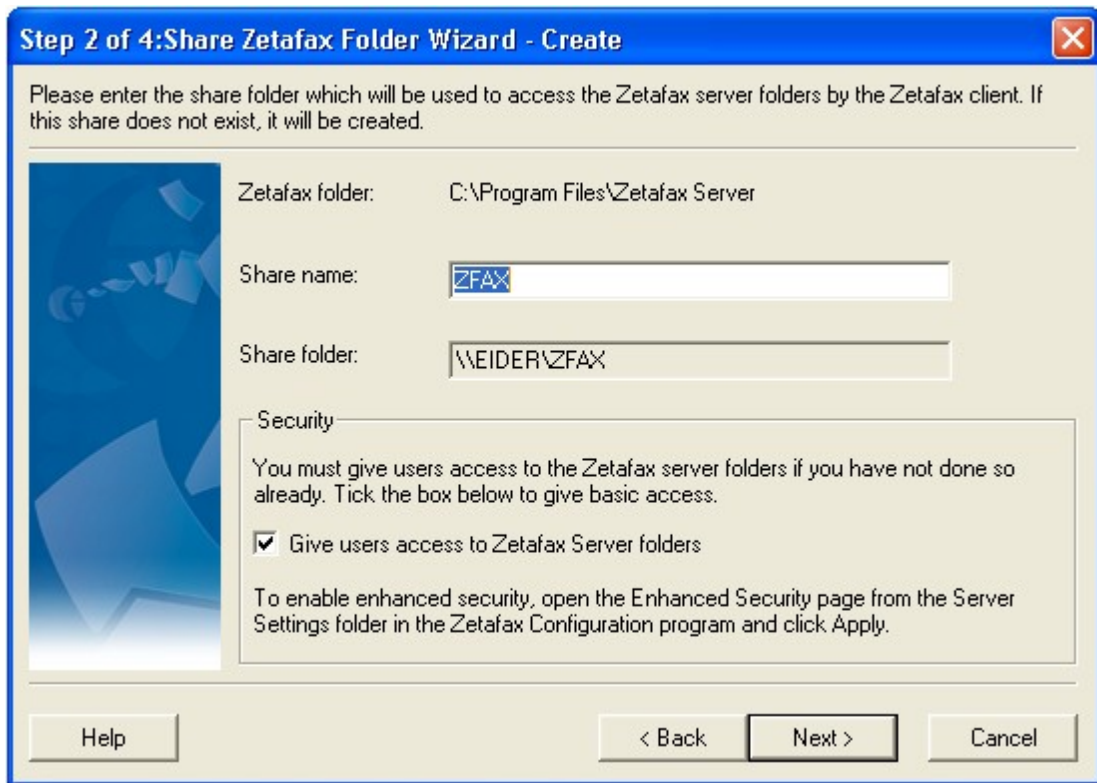
### Register Online

1. Click the **Register Online** button.
2. Add the Company name and select the **Register** button, the Product Registration Page should open already populated with the license key details.
3. Add any remaining missing details and when completed click the **Register** button, your registration code will be emailed to the email address provided on the registration page.
4. Enter this registration code into the License and Registration Wizard, select the **Finish** button to complete your registration process.

### Share Zetafax Folder Wizard

Zetafax is designed on a client/server model, where all data is stored on the server. It is therefore important for client machines to have access to the data on the server. The **Share Zetafax Folder Wizard** is designed to automate this process. The wizard makes Zetafax available on your network and enables access for Zetafax users.

1. Click **Next**.



The dialog displayed allows you to change the share name on the network. This name is used when installing the Zetafax Client. We recommend you accept the default share name of Zetafax. See the [Installing the Zetafax Client](#) section for more information.

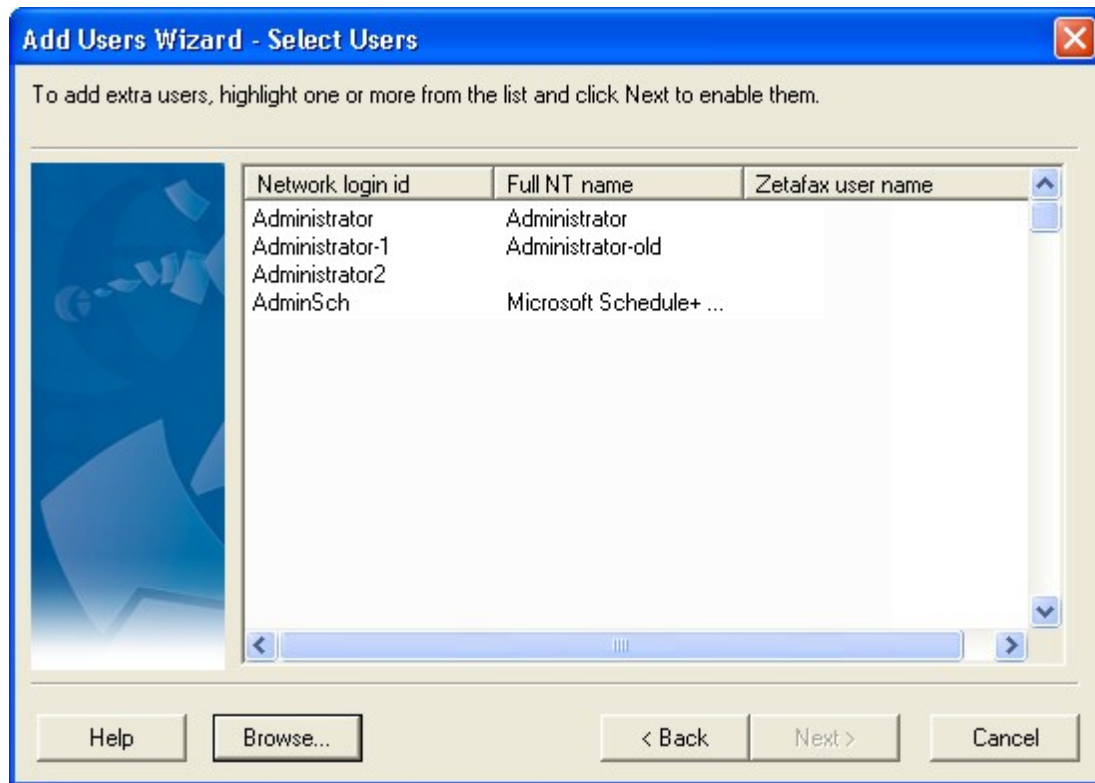
2. Click **Next** and then **Finish** to complete the Share Zetafax Folder Wizard.

The wizard creates a share and grants full access to all users. If you want to control the security of the system and the privacy of faxes between users, see the [Controlling Security](#) section.

### Add User Wizard

The **Add User Wizard** helps to quickly create your Zetafax users.

1. Click **Next**.



The dialog displays a list of Windows users. Select the Windows users that you want to use Zetafax. Hold down **ctrl** or **S** to select multiple users. If you wish to access a different domain, select the **Browse...** button and select the domain you require.

**Note:** You cannot add more users than your license allows.

2. Once you have selected all the users that you require, Click **Next** and **Finish** to complete the Add User Wizard.

The wizard creates users with default settings. If you want to configure individual user settings including access permissions, refer to the [Creating Zetafax user accounts](#) section.

### Device Configuration Wizard

The **Device Configuration Wizard** allows you to configure the system for the devices you want to use, such as fax modems, printers and intelligent fax boards. You can set details such as the type of modem, serial port and who will receive incoming faxes.

- The Device Configuration Wizard automatically detects any Generic Class 1 or 2 fax modems installed on your computer
- If no Generic Class 1 or 2 fax modems are found, click **Next** in the **Start** dialog.
- If a device is found, select **Search for installed modems?** and click **Next**.



Any modems detected are listed in the top pane in the **Device Configuration Wizard - Found Devices** dialog.

- If the modem you want to install is listed, select it and click **Add**. The **Device Configuration Wizard - Settings** dialog provides you with configuration options for the type of device you selected. Click **Help** in each dialog for more information.
- If the modem you want to install is not in the list, click **Back** to return to the previous page, select **Manually install other devices** and click **Next**.
- To install a device other than a Generic Class 1 or 2 fax modem, select **Manually install other devices** and click **Next**.

### Manually installing devices

You can manually install devices from the **Device Type** list in the **Device Configuration Wizard - Found Devices** dialog.

To add a Brooktrout intelligent fax board channel:

- Select your board type from the list, click **Add** and enter the settings – you should add a separate Zetafax device for each channel on the board (except for TRxstream).

**Note:** You must install the relevant Brooktrout device drivers prior to installing a Brooktrout channel in the Device Configuration Wizard. For more detailed information, refer to the *Zetafax Configuration* online help.

### To add a fax modem:

1. Select **Fax modem (class 1 or 2)** from the list and click **Add**:
2. In **Device Configuration Wizard - Special Devices**, select your fax modem (Class 1 or 2) if listed and click **Next**.
3. If your fax modem is not displayed, select **(Not in list)**. Click **Next** to use a generic driver.
4. In the **Device options - Fax modem** dialog, select the COM port to which the modem is attached.
5. In the **Sending** section, you can specify a dial prefix if your modem is connected to a PBX



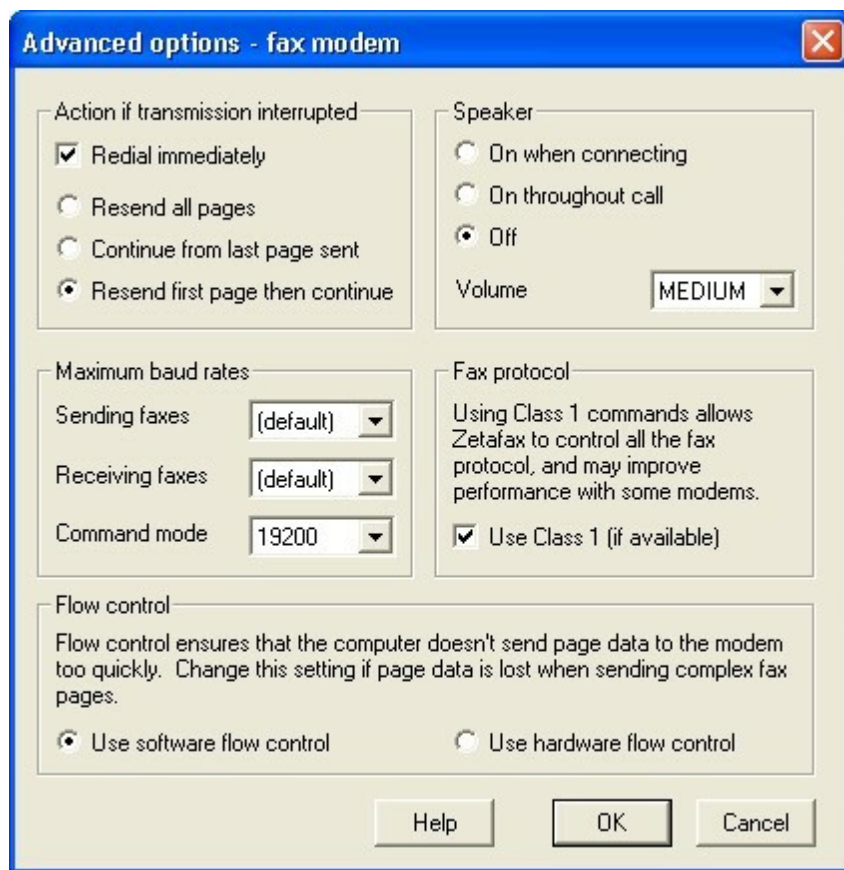
extension. You can also enter the number and organization names to appear on the fax header line. Under **Receiving**, you can configure the modem to be used for incoming calls, outgoing calls or both. Click **Help** in the dialog for more information. Click **OK** to save your settings.

6. Click **All Settings** in the **Special devices** dialog for other settings and **Advanced Options**.

**Note:** To receive inbound faxes, Zetafax requires modem exclusivity - the modem/COM port should not be shared with a remote access service or any other software (such as a dial-up Internet connection).

### Advanced options

The **Advanced options** dialog allows you to specify additional options for the device:



You can configure which action should be taken if fax transmission is interrupted, and turn the modem speaker on and off. You can also edit the modem settings if you have a problem with fax quality or the throughput of faxes; you can specify baud rates (data transmission speed) for sending and receiving faxes and select which fax protocol your modem should use (if applicable).

### Service class

The service class of a fax modem describes how a PC fax application communicates with the fax modem. The most common classes of fax modem are Class 1, Class 2, Class 2.0 and Class 2.1. These classes are specified as extensions to the Hayes command set.

The Zetafax Server supports service Classes 1, 2, 2.0 and 2.1. When you select a modem to add from the **Device Type** list, Zetafax uses the modem in Class 1 mode (if supported).

If you experience problems with your fax modem operating in Class 1 and your modem also supports Class 2/2.0/2.1:

- Clear the **Use Class 1 (if available)** checkbox in the **Advanced options** dialog.

### Testing the Zetafax Server



Once you have completed the Configuration Wizards, the Zetafax Server is ready to send faxes. The next step is to start the Zetafax Server and send a fax to test that it is working correctly.



**Note:** You must send at least one fax before you can register Zetafax.

To send and receive faxes from other Zetafax components, the Zetafax Server software must be running. You can run the Zetafax Server as either a service or a desktop application. If the Zetafax Server is configured to run as a service, it does not need to be started manually as it starts each time the server is rebooted.

**If you intend to run the Zetafax Server as a service:**

- Click **Start** on your server and select **All programs>Administrative tools>Services** to open the **Services Manager**. Check that the **Zetafax Server** service has started.
- To monitor the activity of the Zetafax Server service, click **Start** and select **Programs>Zetafax>Zetafax Server**. The Zetafax dialog is called **Zetafax Server Monitor**.

**If you want to run the Zetafax Server as an interactive application:**

- Make sure the service is not running, then click **Start** and select **Programs>Zetafax>Zetafax Server**. The Zetafax dialog is called **Zetafax Server**.

To send a test fax you need to use the **Zetafax Client**. You can install the Zetafax Client Applications by clicking on **Start > Programs > Zetafax > Install Zetafax Client**. Or you can browse to the server where the Zetafax Server has been installed and click on the **ZFAX** directory > **System > wksetup.exe**. Once installed, to open the Zetafax Client:

- Click **Start** and select **Programs>Zetafax>Zetafax Client**. Follow the instructions in [Sending a simple fax](#).

If the fax message is not sent successfully:

- Right-click on the message in the Zetafax Client and select **Info**. Review the errors displayed to try and fix them.

## The Zetafax Configuration Program

At any time after running the Zetafax configuration wizards, the options entered can be changed via the Zetafax configuration program.

- Click **Start** and select **Programs>Zetafax> >Zetafax Configuration** to start the Zetafax Configuration program. For more information on Zetafax Configuration, refer to the online help.



## Additional information

This section details further configuration information.

### Controlling security

If you want to control the security of the system and the privacy of faxes between users, you can restrict the access rights that users have for the Zetafax directories. The best way to achieve this is to use the **Zetafax Configuration** program to enable Enhanced Security:

1. Click **Start** and select **Programs>Zetafax>Zetafax Configuration** to launch Zetafax Configuration.
2. In the right pane, double-click **Server settings**.
3. Select **Enhanced security** from the list of options.
4. On the **Enhanced security** dialog, click **Enable**.

Enhanced Security controls access to Zetafax directories as shown in the table below. Once it is enabled, Zetafax Configuration will automatically manage all further access to directories.

You can also secure the Zetafax system manually by setting individual users' file access rights for the Zetafax directories on the server. To keep each user's fax area private, only give **Full Control** permissions to the user's private area within the Zetafax directory structure to the user and the Zetafax service account. For example, for a Zetafax user called **JOHN** give **Full Control** to **C:\PROGRAM FILES\ZETAFOX SERVER\USERS\JOHN**.

The files used by Zetafax are split between five areas. These areas are listed in the table below, together with the type of access required by the clients and the Zetafax service account to all files and subdirectories in that area.

In each case, the default directory uses **C:\PROGRAM FILES\ZETAFOX SERVER** as the example Zetafax home directory.

Mail	C:\PROGRAM FILES\ZETAFOX SERVER\MAIL	No Access	Full Control
Area name	Default directory	Client access	Service access
Server	C:\PROGRAM FILES\ZETAFOX SERVER\SERVER	No access	Full Control
System User	C:\PROGRAM FILES\ZETAFOX SERVER\USERS\username	Read Full Control for owning user, No Access for other users	Full Control Full Control for all users directories
Request	C:\PROGRAM FILES\ZETAFOX SERVER\REQUEST	Full Control	Full Control



## Installing the Zetafax Client Applications

### IT administrator

This section assumes an IT administrator installs the Zetafax Client Applications software on users' computers. We recommend that the fax server is running while the users' workstations are set up.

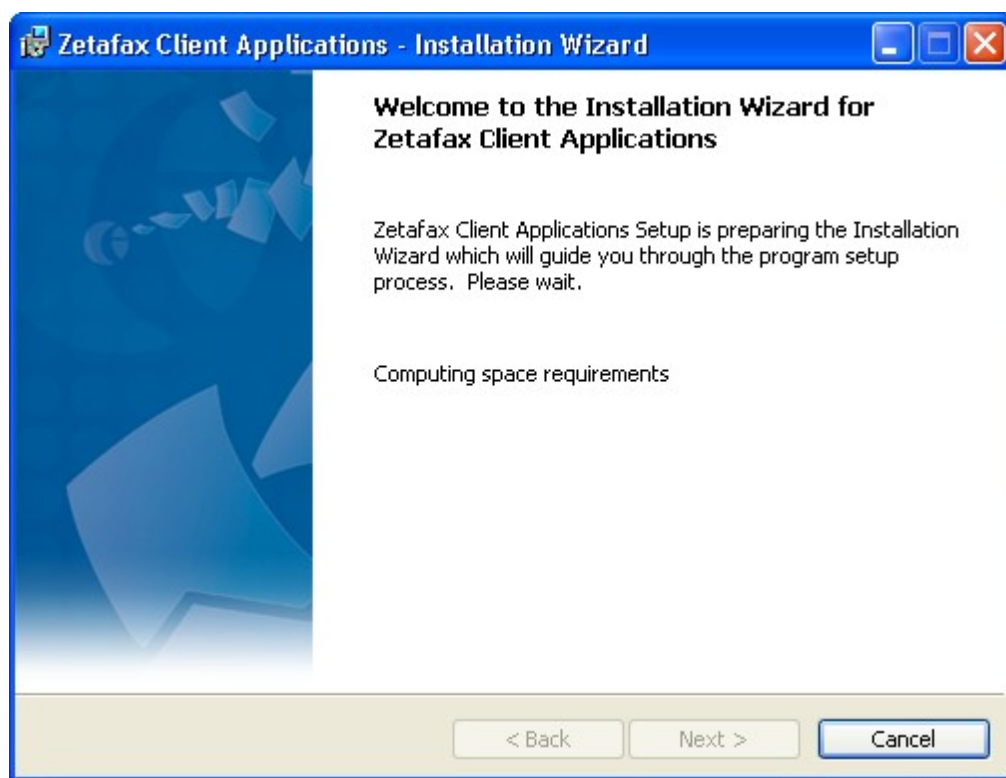
### Preparation

Before attempting to set up the Zetafax Client Applications:

- Check that a Zetafax user account has been set up for the user. Refer to [Creating Zetafax user accounts](#) for more on setting up users.
- Ensure that you have access to the installed Zetafax Server and that the directory where the Zetafax programs reside is shared. By default, this is **\zfax**.

To install the Zetafax Client Applications:

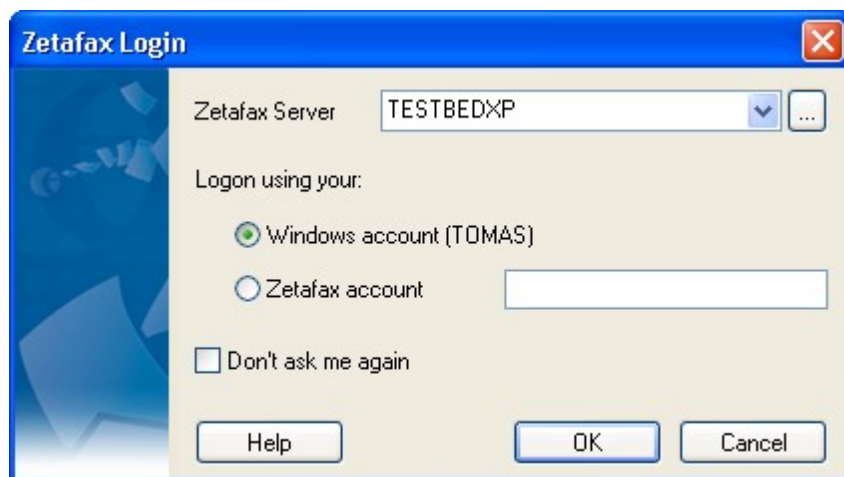
- Log on to the user's PC using an account with local administrator rights.
- Map a drive to the **\zfax** share on the server where Zetafax Server is installed, or use **Network Neighborhood** to navigate to that location.
- In the **\zfax** share, open the **\SYSTEM** subfolder and run **WKSETUP.EXE**



- Choose the language for the installation from the drop down menu, click **OK**.
- The installer will check if Microsoft Office applications are already installed on your computer.
- Click on the **Next** button



- You will be prompted to choose the setup type you require: **Express** setup- will install the following program features (Zetafax Client and Microsoft Addins) if you have Microsoft Office already on your computer. If the relevant Microsoft Office applications are not present, the Microsoft Addins will not be installed. [Custom setup](#) - allows you to choose which program features (which include FaxBroadcast and Outlook Integration) you require. We recommend that you choose the **Express** setup type.
- Follow the on-screen instructions and click **Finish** to complete the install.
- Click the **Start** button and select **Programs>Zetafax>Zetafax Client** to start the Zetafax Client.
- The **Zetafax Login** dialog displays the name of the network server where the Zetafax Server is installed. If this is incorrect, click the browse button (...) to locate the Zetafax Server on the network.



- Confirm your **Zetafax username**:

**Windows Account** - Uses your current Windows Account to log on to Zetafax

**Zetafax Account** - Uses your Zetafax Account to log on to Zetafax.

- Click **OK** to start the Zetafax Client.
- If you select **Don't ask me again**, the next time you run the Zetafax Client, it automatically logs you in with the same username.

#### Related Topics

[Custom Setup Type](#)



## Custom Setup Type

If you choose the Custom setup type when installing the Zetafax Client Applications, you have the option of selecting the program features you require from the list: Zetafax Client, Fax Broadcast, Outlook Integration, Microsoft Office Addins.

Please note that Zetafax Client is a Required feature.

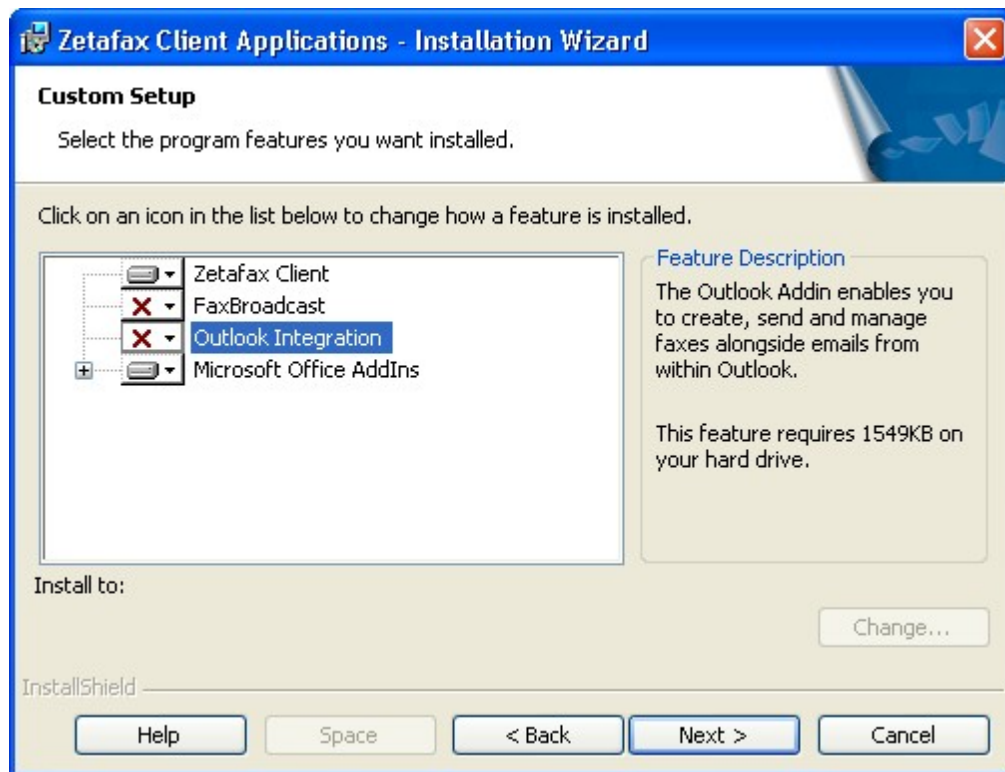
Or

If at a later date you decide to add a program feature for example, Microsoft Outlook Integration, you have the option of doing this by clicking on **Start > All Programs > Zetafax Client > Install Zetafax Client** and follow the steps below:

- Click **Custom**



- Click **Next**



- Click on the drop-down arrow next to the program feature you want installed.
- Select the appropriate actions you require by clicking on the down arrow next to the feature: If you do not want a feature installed, click on This feature will not be available, or if you want to install a feature then click on This feature and all sub features will be installed on local hard drive.
- Click on **Next** to continue the installation. Follow the on-screen instructions and click **Finish** to complete the install.

**Related topic:**

[Installing the Zetafax Client Applications](#)



## Integration with Microsoft Office

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Zetafax integrates closely with Microsoft Office applications such as Word and Excel.

Using the addins, submitting a fax from a Microsoft Office application is a single-stage process. There is no need to change printer driver to the Zetafax printer from your network printer, instead just click the Zetafax printer button or click on send to.. Zetafax printer from the file menu or Microsoft office button and Zetafax will prompt you for where you want to send the fax.

Combine the embedded addressing functionality of the Zetafax API with the Mail Merge feature of Microsoft Word, and you can automate the whole sending process from start to finish. Use Mail Merge to create multiple personalized documents containing the addressing information for the fax and click Zetafax printer button. Your document will be printed automatically and Zetafax will use the addressing information embedded in the documents and address each of the faxes individually in the background. When the faxes have been send, Zetafax will notify you whether each of them has been sent successfully or not.

### Installing the Zetafax Office Addins

The easiest way to install the Office Addins for both Microsoft Word and Microsoft Excel is by selecting the **Express** setup type when installing the Zetafax Client Applications.

If originally you chose not to have the Microsoft addins installed, by choosing the Custom setup type, you may decide to install the addins at a later time.

For more information please see [Custom Setup Type](#).



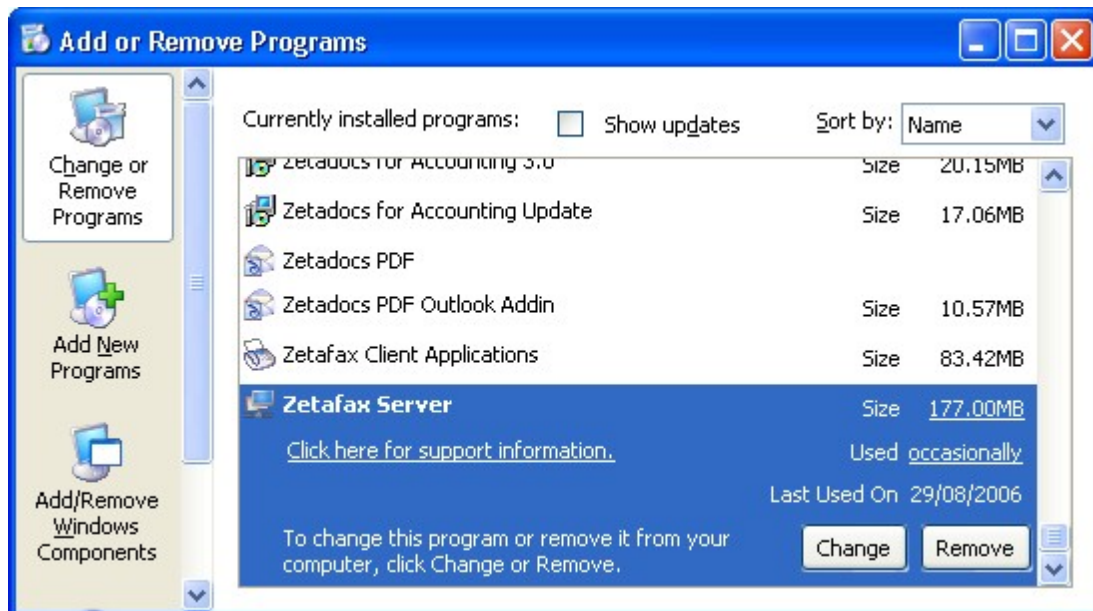


## Uninstalling Zetafax

Before uninstalling the Zetafax Server, stop the server if it is running. See [Starting and stopping the Zetafax Server](#) for more information.

To uninstall the Zetafax programs:

- Click **Start**
- Click **Control Panel**
- Then double-click **Add/Remove Programs**.
- Select **Zetafax Server**
- Click the **Remove** button.
- To remove the **Zetafax Client Applications**, select **Zetafax Client Applications** and click the **remove** button.





## Upgrading from a previous version of Zetafax

---

### Upgrading an existing installation of the Zetafax Server

To upgrade a previously installed version of the Zetafax Server:

1. Shut down the Zetafax Server or stop the Zetafax Server service using the **Service Manager**. To open the Service Manager, click **Start** and select **All programs>Control Panel>Administrative tools>Services**.
2. Run the installation program (**SETUP.EXE**) from the CD-ROM or from the download of the new version. When prompted, enter the upgrade number given when you purchased the new version of Zetafax.

### Upgrading the Zetafax Server on a new PC

If you are upgrading Zetafax, but the old version is no longer installed:

1. Run the installation program (**SETUP.EXE**) from the CD-ROM or download of the new version.
2. Enter your starter system license number. This is the three-part license number given to you when you first purchased Zetafax.
3. When the installation has completed and the Zetafax Configuration program runs, you need to install the add-on for version upgrade. Click **Add** and enter the upgrade number given when you purchased the new version. **Make sure you enter any upgrades obtained in the past (for instance, additional lines or users)**.
4. Click **Next** and enter your details in all the dialogs displayed. When you click **Finish**, your new Zetafax installation is ready to be registered. To do this, you can start the Zetafax Server and open the Zetafax Client. The Client will automatically prompt you to register your copy of Zetafax with our [online registration](#).

### Upgrading the Zetafax Client Applications (Zetafax Client, Microsoft Office Addins, Outlook integration)

When the server has been upgraded, you can upgrade the Zetafax Client Applications.

If you have an existing version e.g. 2006 or 2007 Zetafax Client then, after the Server 2012 update, the first time you open each existing Zetafax Client install the Client automatic update feature will ask if you wish to update the Client now or later. If you click "Yes" and then follow the installation wizard, the install will run and complete.

If you are running an earlier version of the Zetafax Client you need to perform the following steps:

1. Log on to each user's PC as a user with local admin rights. Ensure that the Zetafax Client is not running.
2. Click the **Start** menu and select **Zetafax > Install Zetafax Client Applications**.
3. The Zetafax Client Applications Installation program launches. Follow the on-screen instructions to install the latest client applications.

### Upgrading the Zetafax Exchange Connector

To upgrade the Zetafax Exchange Connector, you must first uninstall the existing connector on the Exchange Server. To do this:

1. Log on as a user with sufficient rights, for example, **Domain admin** rights.
2. Open the **Control Panel** and double-click **Add/Remove programs**.
3. Select **Zetafax Exchange Connector** and click **Uninstall**.
4. Restart the Exchange server.

Next, install the new connector from the Zetafax CD or downloaded from the Equisys website. To do this:

1. Insert the CD in the CD-ROM drive or download the update and select run. The installation program runs automatically.

2. In the dialog displayed, select **Install Zetafax Connector**, then choose the relevant option from those listed.

### Upgrading the Email Gateway

The Zetafax Server installation program now includes the Zetafax Email Gateway files. As a result, the Email Gateway is automatically upgraded when the Zetafax Server is upgraded.

### Upgrading the Web Client

To upgrade Zetafax Web Client:

1. On the server hosting the Web Client, run the install program from the Zetafax CD. During the install, you are prompted to re-enter the account name and password created when you installed the earlier version of the Web Client.

See [Installing the Zetafax Web Client](#) for more information.

### Upgrading Notebook Installations

To upgrade notebook installations:

1. Upgrade the network Zetafax Server (see [Upgrading an existing installation of the Zetafax Server](#)).
2. Insert the (new) Zetafax CD into the machine with a notebook install.
3. Connect the notebook PC to the network and run **Setup.exe** from the CD. The install detects the notebook install and updates it.
4. Once the update is completed, upgrade the Zetafax Client (see [Upgrading the Zetafax Client](#)).

### Upgrading API applications

If your Zetafax API application uses **ZFAPIS2.DLL**, ensure that your application loads the updated version of the DLL installed with the updated Zetafax Server. If your application links statically to the API library (**ZFAPIS.LIB**), you should recompile your application and link to the updated library file, which is also installed with the updated server.

### Upgrading SMTP Server

To upgrade the SMTP Server:

On the server that has the SMTP Server installed, run the install program from the Zetafax CD or downloaded from the web.



## Moving a Zetafax installation

In certain situations, it is occasionally necessary to migrate your Zetafax Server to a different machine. The following information is designed to help make this process as easy as possible. It is advisable to back up any important data before working through this process.

1. Ensure all users are logged out.
2. Shutdown Zetafax Server. (If it is running as a service stop the service in services MMC.)
3. After shutdown move the FAX device hardware and drivers as necessary.
4. Install the Zetafax Server on the new machine using your product CD. Choose "Standard Zetafax Server Installation". When prompted be sure to enter the company name from the original server and your previous version's starter licence number. You will be prompted with a warning message that you will need to enter an upgrade licence, click OK to continue.
5. At the end of the install click 'Finish' - DO NOT click 'Configure' to run the configuration program.
6. Browse (using Windows Explorer) across the network to the original Zetafax Server and look in the root installation folder (e.g. '\\Old-Zetafax-Server\ZFAX'). Copy the following files and folders to the new Zetafax Server root installation folder (e.g. 'C:\Program Files\Zetafax Server'). Where \*.\* is listed do a select all (CTRL+A) in the original source folder. If prompted about overwriting files and folders click 'Yes to All'.

Folder	Description
\Users\*.*	User folders and faxes
\Server\Z-RECD\*.*	Received fax archive (Only if archiving enabled)
\Server\Z-SENT\*.*	Sent fax archive (Only if archiving enabled)
\Server\Z-DB\*.*	Server logs and current queues
\System\Z-COVER\*.*	Custom coversheets
\System\Z-LETTER\*.*	Custom letterheads
\System\Z-GRAPH\*.*	Custom attachments
\System\Z-DB\*.*	System configuration

If using the Zetafax email gateway to send and receive faxes from your email client you should additionally copy the following files:

\Mail\Data\\*.\* Mail gateway configuration

7. Browse to your new installations 'Setup.ini' file which is located in the 'Z-DB' sub-folder in your 'SYSTEM' folder (e.g. 'C:\Program Files\Zetafax Server\SYSTEM\Z-DB'). Open the file with Notepad and locate the '[REMOTEADMIN]' paragraph. Depending on the version of Zetafax you are upgrading this section may not be present. If not present ignore this point and continue from point 8.

[REMOTEADMIN]

...

ServerComputerName: <Old-Zetafax-Server>

...

...

Modify the 'ServerComputerName' name line so that it contains your new Zetafax Server machine name. Save and close the 'Setup.ini' file.

8. Start the Zetafax Configuration program (Start->Programs->Zetafax->Zetafax Configuration). Click 'Next' when prompted to start the 'Share Wizard'. This will set up your network shares and Active Directory (if available) settings for your Zetafax Server.
9. Once the wizard completes you will be prompted to enter your upgrade licence. This is the number that starts with a U.
10. Work through the licensing and registration screens and click 'Finish' when prompted.

11. Now go to 'Devices' in the Zetafax Configuration program tree and check that the configured devices and all their settings match the devices installed on the new Zetafax Server machine.

**Note:** If using Brooktrout cards you should remove them in the Zetafax configuration then re-add them after installing the Brooktrout hardware to insure that the Brooktrout drivers and software are installed correctly.

12. If using the email gateway, go to 'Server Settings' in the Zetafax Configuration program tree and double-click the 'Email Gateway'. Check that the gateway is enabled and all the settings match your mail configuration.
13. Close the Zetafax Configuration program and start up the Zetafax Server and verify that it starts successfully.
14. If your Zetafax clients connect to the Server via drive mappings ensure that you disconnect the current drive mapping on each Zetafax client and map the same drive letter used before to the ZFAX directory on the new Zetafax sever. You should then run each Zetafax Client and make sure it connects to the new server, if necessary by selecting or browsing to it from the Zetafax Client Login prompt.



## Installing the Zetafax Web Client

---

Zetafax includes a **Web Client** application that allows an IT administrator to deploy a fax service to all network users without the need for separate fax clients. The Web Client is deployed with a single central install - centrally hosting a client application makes it possible to provide fax services on a company-wide Intranet.

The Zetafax Web Client enables you to send and view faxes over the Intranet using Internet Explorer. With the Web Client, you can also use your Microsoft Exchange address book to address faxes. For details on how to configure this, see [Installation](#).

**Note:** By default, the Web Client allows users to attach ASCII text files and most graphics files, which are converted by the Zetafax Server when faxing. To convert other documents, such as Microsoft Word files and over 225 other file formats, you must purchase and license the **Document Conversion** add-on. Contact Equisys or your local distributor for more information.

The Web Client does not prompt for login details, but looks for a Zetafax account that matches the Windows account of the user attempting to start the Web Client. Anonymous logon or logon using guest accounts is not supported – users must have both Zetafax and Windows accounts.

### Pre-requisites

To install the Web Client, you must meet these requirements:

- The Web Client software must be installed by an administrator with domain admin rights on a computer running Windows 2003 server or later.
- The computer running the Web Client must have IIS 5.0 or later installed.
- The Web Client computer must be able to access the **Zetafax Server** shared folder.
- If you want to use the Microsoft Exchange address book to address faxes, the Web Client computer must be able to access the Microsoft Exchange server (version 2003 or later).
- Client machines must have Internet Explorer 5.0 or later.
- You must create a Windows account under which the Web Client will run.

### Creating a Windows Account

The Windows account that you create must have the following rights:

- Full access rights to the **Zetafax Server** shared folder.
- Read access rights on the Exchange server.

The rights you apply to this account depend on the level of Microsoft Exchange address book integration you require:

- For access to the Global Address List (GAL) only – set the account to have anonymous logon access.
- For a user to view his or her own address book – set the account to have read access to each user's contacts/address book.
- For full access – set the account to have read access to everyone's address books/contacts folders.

Additionally, you should set the password for this account to never expire.

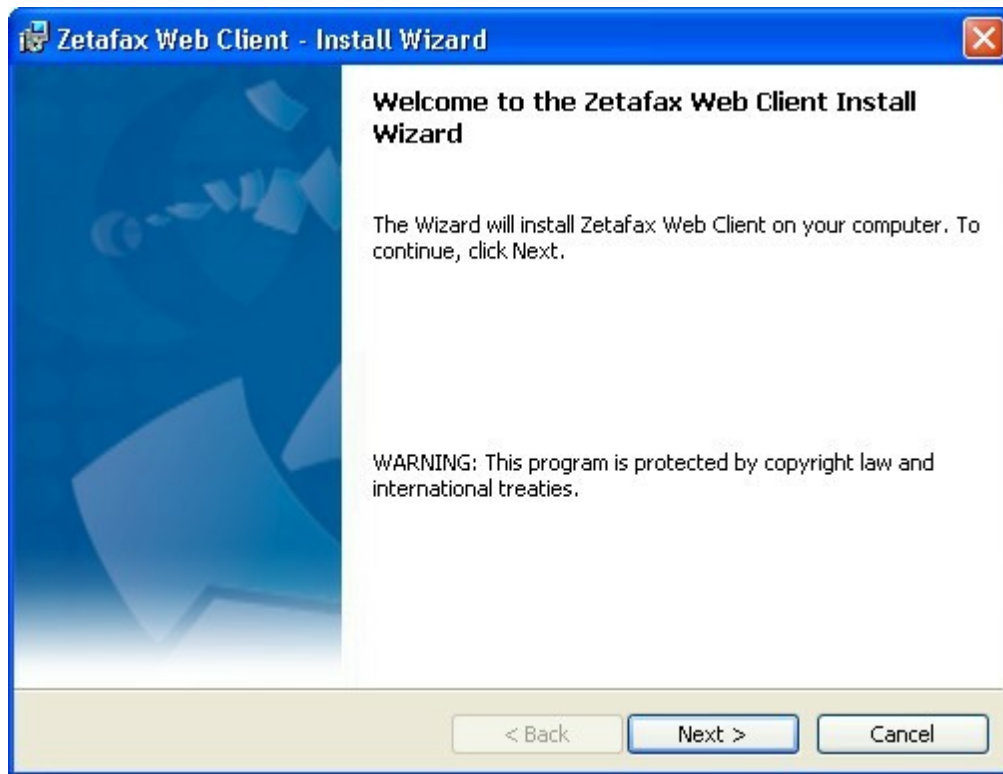
### Installation

Please have the following information to hand before running the Zetafax Web Client:

- The location of the directory on which the Zetafax Server is installed.
- The type of Exchange server you want to use for address book integration.
- The name and password of the Windows account you created above.

To install the Zetafax Web Client:

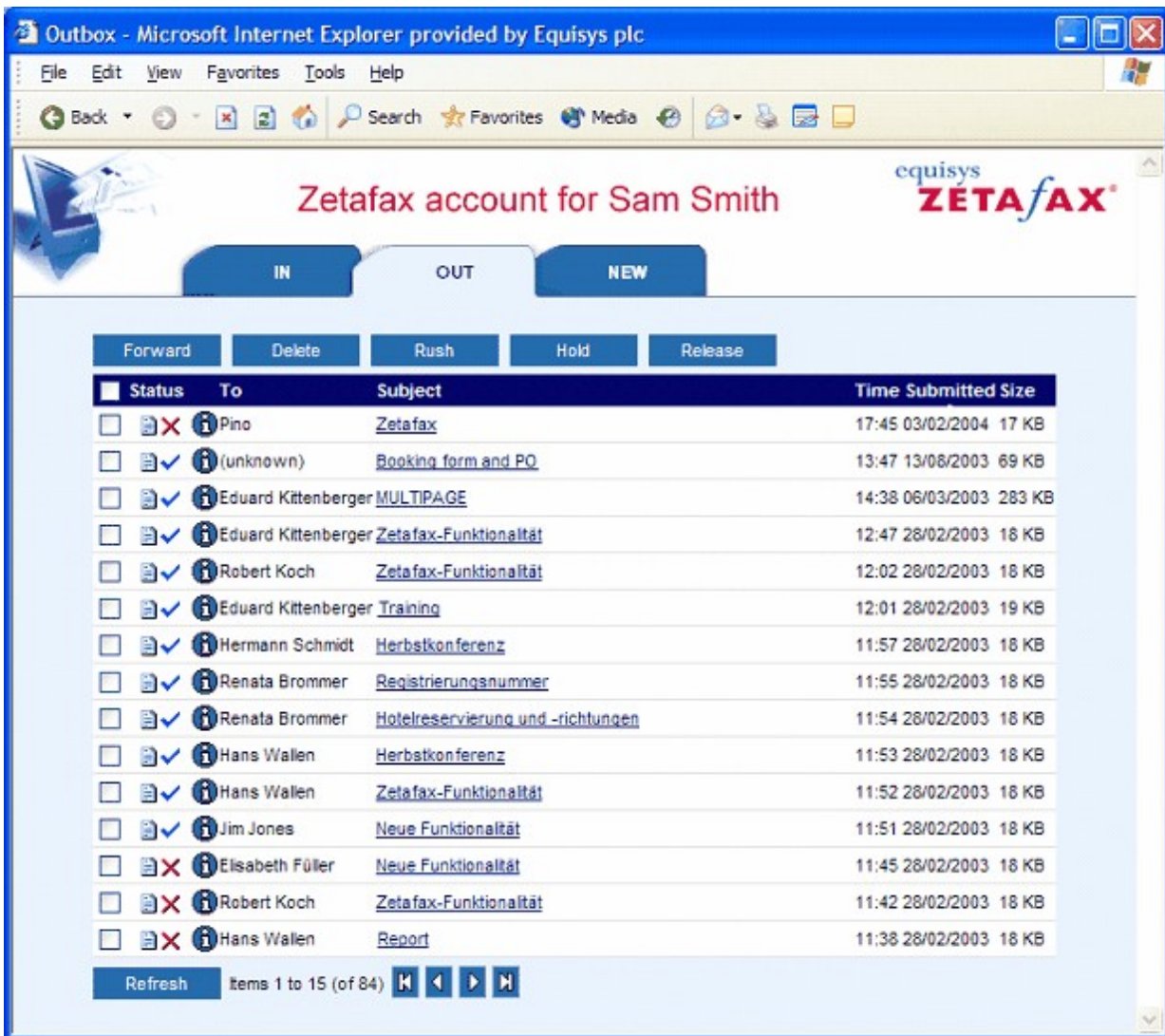
1. Insert the Zetafax CD and choose the **Install Zetafax** and then **Zetafax Web Client** option.
2. Click **Next** on the first screen.



3. Enter the location of the **Zetafax Server** directory and choose whether you are using Exchange 2003 or Exchange 2007. Click **Next**.
4. On the **User Configuration** dialog, enter the name of the account you created and the password. Click **Next** and on the following screen click **Install** to begin the installation.

Once these steps have been completed, you can open the Web Client to check that it was installed successfully.

1. To do this, launch Internet Explorer and enter **http://<localhost>/Zetafax** in the address bar, where **<localhost>** is the name of the machine with the Web Client installed.
2. You can view your Zetafax account in your web browser.



If you need further guidance in setting up the Web Client, search the *Knowledgebase* on the Equisys web site, [www.equisys.com/support/](http://www.equisys.com/support/).

### Web Client functionality

Once installed, the Web Client allows you to perform the following functions using your web browser:

- View fax Inbox and Outbox
- Send fax
- Use Address books:
  - Outlook Contacts
  - Microsoft Exchange (Global Address List)
- Previous fax recipients
- View fax
- Select cover sheet and letterhead
- Add cover sheet note and subject
- Preview fax before sending
- Forward, rush, hold, release, abort, delete, view faxes from fax Inbox and Outbox
- Include file attachments:
  - ASCII text and most graphics file formats, such as BMP, JPG, TIFF, as standard.
  - Microsoft Office documents and over 225 supported file formats, available as an option.



Send Fax - Microsoft Internet Explorer provided by Equisys plc

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media

**Zetafax account for Sam Smith** **equisys ZETAfax**

**IN OUT NEW**

**Send Previous Recipients...**

**Priority:** Normal **Coversheet:** EQPLC-01 **Letterhead:** EQUK-01 ☐ Return for Preview

**Name:** Jim Jones **Organization:** Jones and Sons **Number:** 0123 456 789 **Add**

**Fax Address:** **To...**

**Subject:**

**Attach...** Quote and price list.xls

Dear Jim,

I'm sending this fax to test the latest Zetafax release from Equisys.

Zetafax has been designed with ease of install in mind and includes configuration wizards to ensure you get up and running quickly. This award-winning product offers a robust and stable set of features:

- Supports the latest platforms: Microsoft Exchange 2003, Office 2003 & Lotus Domino R6.5
- Provides organizations of all sizes with automated faxing to and from the desktop.
- Simple to install and manage
- Easy to use, with a rich and versatile set of user features

Zetafax also includes a Web Client application that enables you to send and view faxes over the Intranet using Internet Explorer. This is what I am using right now to send you this fax.

**Send**



## Installing a Zetafax Server on a notebook computer

---

The Zetafax Server comes with the option to install a copy onto a notebook computer, so you can send and receive faxes while away from the office. When you start the Zetafax Client, it automatically detects if your PC can connect to a network fax server. If not, a version of the Zetafax Server can be run locally, using the fax modem in your PC.

To install a copy of the Zetafax Server on a notebook computer:

1. Ensure that the Zetafax Client is installed on the computer and that you can send and receive faxes when connected to the network.
2. Insert the Zetafax CD into the notebook's CD-ROM drive. The installation program should run automatically. If this fails, browse to the CD-ROM drive and double-click **Setup.exe** to run the installation.
3. Select the **Install Zetafax**, then **Zetafax Server** options.
4. The installation program asks if you want to install Zetafax on a notebook. Choose **Advanced Server Install**, select **Notebook Server Install** and click **Next**.
5. The installation program installs the Zetafax Server files to the computer. After the files have installed, you are prompted for the location of the network server. Enter the path of the shared **Zetafax Server** folder on the network (e.g. **\\Zetafax Server**). The installation program makes the necessary changes to the Zetafax configuration settings file to enable the Zetafax Server to run locally when the notebook is not connected to the network.
6. At the end of the installation, Zetafax Configuration runs and prompts you for a starter system license number. If you are connected to the network, Zetafax enters the starter system license details automatically.

### Notebook user licensing

Zetafax systems are licensed for a fixed number of users with a single Zetafax Server. You can create accounts on the server for the licensed number of users. In addition, any of the Zetafax users can run a standalone copy of Zetafax Server on a notebook computer, which may or may not connect to the network.



## Zetafax users

A Zetafax User is a member of your network that has been set up with one of the Zetafax user licenses and is therefore authorized to send and receive faxes.

The topics in this section explain how to create Zetafax users, set up user defaults, create user groups and increase security.

[Creating Zetafax User Accounts](#)  
[Enabling network users for Zetafax](#)  
[Creating Zetafax User groups](#)  
[Zetafax Login](#)  
[Security](#)

If you find that you require additional Users for your Zetafax System, please contact your local distributor or Equisys directly on:

***Equisys plc***  
**Sales**

Tel +44 (020) 7203 4001  
Fax +44 (020) 7203 4005  
[sales@equisys.com](mailto:sales@equisys.com)

<http://www.equisys.com>

**Technical support**

Tel +44 (020) 7203 4002  
Fax +44 (020) 7203 4005  
[support@equisys.com](mailto:support@equisys.com)

***Equisys Inc (USA and Canada)***

**Sales**

Tel (770) 772 7201  
Fax (770) 442 5789  
[sales@usa.equisys.com](mailto:sales@usa.equisys.com)

**Technical support**

Tel (678) 942 7250  
Fax (770) 442 5789  
[support@usa.equisys.com](mailto:support@usa.equisys.com)



## Creating Zetafax user accounts

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This topic explains how to set up users of the Zetafax system. See [Enabling network users](#) to define user access restrictions.

### User maintenance

Users are added using the **Zetafax Configuration** program. Permissions such as the ability to send urgent faxes or edit the network address book may be set individually for each user.

#### To add a user

You can add a user in two ways:

1. Select the **Zetafax** folder and click **Add user** in the right pane.
2. Select the **Users and user groups** folder, highlight **Zetafax users**, click the **Action** menu or right-click and select **Add new Zetafax user**.

The **Add new Zetafax user** dialog is displayed.

### Username

#### Windows Account

Uses your current Windows Account to log on to Zetafax

#### Zetafax Account

Uses your Zetafax Account to log on to Zetafax. Your Zetafax Account may be different to your Windows Account.

**Note:** Zetafax Usernames can only use the following characters: A-Z, 0-9, '\_', or '-'

### New user defaults

The Zetafax Configuration program makes it simple to configure groups of Zetafax user accounts at once each with similar privileges. This is achieved using the **(new user defaults)** account in the **Zetafax user details** dialog. The **new user defaults** setting acts as a "template" from which all new Zetafax accounts are based. If you wish to configure several Zetafax users at once and to specify restrictions such as send time and dial allowed, you can edit the (new user defaults) user, specify the appropriate restrictions and create a new user by clicking the **New** button. The new user and subsequent new users will inherit the properties of the (new user default) settings.

**Note :** Using the (new user defaults) setting, it is also possible to specify whether each new Zetafax user is enabled to use the email gateway. If either of the **Allow sending from email gateway** or **Forward received messages via email** check boxes are selected, the Zetafax Configuration program will find a match for the network username from the list of email users it acquired using the email username Import Service. If Zetafax does not find a match in the email list, an email username can be entered manually at a later stage in the appropriate field.

### Related topics

[Enabling network users](#)

[Set new Zetafax user defaults](#)

[Setting up email gateway users](#)



## Enabling network users for Zetafax

Zetafax provides two options for enabling existing network user accounts directly, by either using a list of users from the primary domain, or from an individual machine. This method of importing usernames is the fastest way of installing multiple Zetafax users. The Zetafax Configuration program will generate Zetafax usernames automatically based on the network username.

- Run the **Zetafax Configuration** program and from the left pane select **Users and user groups**.
- Select **Network users** and all the Domains on your system will be displayed.
- Choose the Domain you require and all members of that Domain will be listed.

To enable all users of a domain:

- Select the first name from the list, scroll to the end, and click the last user whilst holding down the **S** key.

This will highlight all users. Right click and select **Enable** to enable the selected users.

The user icon next to these users will now change to show that the users you selected are now within Zetafax. These new users will inherit privileges identical to the (new user defaults) account.

To set restrictions individually per user:

- Select the user in the list and click **Edit** (**Action** menu) or right click and select **Edit**.

The **Zetafax user details** dialog lets you define the user's restrictions: Set the restrictions as required and click the **OK** button to save the changes.

### Related topics

[Creating Zetafax user accounts](#)

[Set new Zetafax user defaults](#)



## Creating Zetafax user groups

---

Use Zetafax groups to apply common settings to a number of Zetafax users.

### To add a new user group

- Select the **Users and user groups** folder.
- Highlight **Zetafax groups**.
- Click the **Action** menu, or right-click, and select **Add**. The **Add new Zetafax user group** dialog is displayed.

### Related topics

[Zetafax Login](#)

[Enabling network users](#)

[Zetafax user group details](#)

[Setting up email gateway users](#)

[User groups](#)



## Zetafax Login

To use Zetafax you must be logged in to the Zetafax Server using an account name. In most cases you can use your Windows Account name to log in, alternatively Zetafax Account name can be given. The Zetafax login dialog box will be displayed whenever you launch the Zetafax Client unless you check the Don't ask me again box.

### Zetafax Server

The Server that you wish to Logon to - All previously accessed servers are available from a drop down list, with the last server accessed displayed. To change to a new server, browse to the desired location using the browse '...' button.

### Windows Account

Uses your current Windows Account to log on to Zetafax

### Zetafax Account

Uses your Zetafax Account to log on to Zetafax. Your Zetafax Account may be different to your Windows Account.

### Don't ask me again

Select this option to automatically logon to the Zetafax Client without being prompted for your Username.

To get the Zetafax client to prompt for the username each time it is run, access the **Customize** dialog from the **Options** menu from within the **Zetafax Client** and choose the **Prompt for username at startup** option.

### OK

Attempts to login using the Zetafax username entered.

### Cancel

Exits Zetafax without attempting to login

### Related topics

[Creating Zetafax users](#)

[User groups](#)

[Security](#)

[Setting up email gateway users](#)

[Email profile accounts](#)



## Security

---

To make your fax transmissions secure, you can set up Zetafax so that users need to log on to access sent and received faxes. Once you do so, users can only access their own faxes after supplying the correct logon credentials. Security is set up in the Server settings section of the **Zetafax Configuration** program. Please read below for an explanation of how to set up user permissions.

The operation of the Zetafax Server is heavily based on files stored within the Zetafax Server folder structure. Protecting the integrity of Zetafax user data is therefore largely a matter of applying the appropriate permissions to folders within this file structure.

### Supported platforms

Folder and file security requires the NTFS file system. As a consequence, enhanced security is only available on NT-family operating systems (Windows 7, Windows Vista, Windows XP, Windows 2003 Server, etc.). In addition, all the relevant Zetafax folders must be on NTFS-formatted partitions.

### The Zetafax Server service

In order to run with enhanced security, the Zetafax Server must be configured to run as a service. This ensures that the Zetafax Server always runs as the account set in the service properties. This account will be given the necessary rights over the Zetafax Server folder structure. Note that the service cannot be set to run as 'LocalSystem' if enhanced security is to be used.

### The Zetafax Admin's group

When enhanced security is applied, a new NT Group, the *Zetafax Admin's group*, is created. If the Zetafax Server Service account is local to the host computer, this group will be a local group, otherwise this group is a global group. The Zetafax Server service account is added to the group, as is the account of the logged in user — this is assumed to be the appropriate administrator account for the Zetafax Server. Users should ensure that the account they are logged in as is one they would be happy to have added to the Zetafax Admin's group. Note also that if the service account is global but the user is logged in with a local account, the creation of the Zetafax Admin's group will fail as local accounts cannot be added to global groups.

The Zetafax Admin's group will be given wide-ranging rights over the Zetafax Server folder structure. This is necessary for the Zetafax Server to function and for the administrator to continue to perform tasks such as configuring the Zetafax Server, adding users, etc. It also means that anyone logged in with an account that is a member of the Zetafax Admin's group could access confidential information from Zetafax user accounts, so appropriate precautions need to be taken (e.g. only authorized people are given the relevant administrator and service account passwords).

### User permissions

In general, all Zetafax user accounts should be associated with an NT user account. This NT account is then given *Full Control* over that Zetafax user's folder. No other user (aside from members of the Zetafax Admin's Group) has any access to these folders. Note however that if the Zetafax account is not associated with an NT account, no security is applied to this account.

### Zetafax Groups

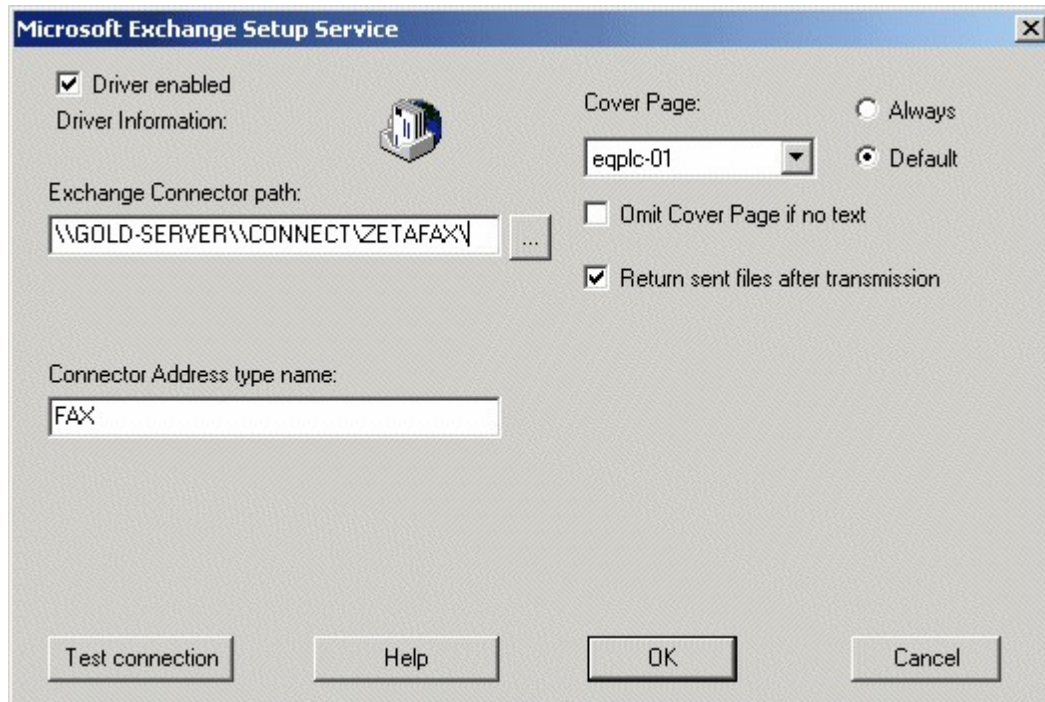
When a Zetafax Group is created, no security is applied to its folders. The first time a Zetafax user is added to the group, security is applied so that only that user and the Zetafax Admin's Group have access to the group's folders. When subsequent Zetafax users are added to the group, they also get access to the group folders. This access is removed if the Zetafax user is removed from the group. Note that the above only applies when the Zetafax users are associated with NT accounts. If a Zetafax group includes no Zetafax user associated with an NT account, then no security is applied to the group folders.

### The Email Gateway

In general the security of the Email Gateway will depend on the email system concerned. With the Microsoft Exchange Email Gateway there is one extra issue administrators should be aware of. Two folders



are created for temporary files used for communication between the Zetafax Exchange Connector and the Zetafax Server. Because these temporary files could contain sensitive information, administrators should set appropriate permissions on these folders. The Zetafax Admin's group and the account the Zetafax Exchange Connector run as should both have full access to these folders.



### Auto submit, archiving and LCR

It is possible for administrators to specify folders for these features which will contain information from users' fax messages (although these will be only temporary for LCR and Auto submit). If these folders are within the Zetafax file system under the 'Server' folder (as they are by default), the enhanced security will be applied to these folders. If these folders are located elsewhere, the administrator will need to apply security manually to these folders. Note that the Zetafax Admin's group will need full access to these folders.

### Related topics

[Archiving of sent and received faxes](#)

[Least Cost Routing \(LCR\)](#)

[Zetafax Login](#)

[Adding new Zetafax users](#)

[Adding new Zetafax user groups](#)

[Setting up email gateway users](#)

[Server settings](#)



## Devices

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You can incorporate devices into your Zetafax system, such as modems, printers and intelligent fax boards.

You need to set up at either a fax modem or an intelligent fax board in order to be able to send and receive faxes.

For systems of over 25 users we strongly recommend an intelligent fax board.

These topics explain how to set up devices for use with Zetafax.

Click a topic for more information:

[Device Configuration Wizard](#)

[Configuring devices](#)

[Using Zetafax with intelligent fax boards](#)

[Using Zetafax with the HP Digital Sender devices](#)

[Automatic printing](#)

[Hardware requirements](#)



## Configuring devices

The Device Configuration Wizard, part of the Zetafax Configuration program lets you configure the system for the devices that you will use. It sets details such as the type of modem, serial port, and who will receive incoming faxes.

For information about installing, configuring and using intelligent fax boards, see [Using Zetafax with intelligent fax boards](#).

### To configure a new device

- Click the **Start** button, point to **Programs**, point to **Zetafax**, and then click **Zetafax Configuration**.
- In the right pane, right-click on **Devices** and select **Add**. The **Device Configuration Wizard** is displayed.
- The **Device Configuration Wizard** will automatically detect any Generic Class 1 or 2 fax modems installed on your computer.
- If no Generic Class 1 or 2 fax modems are found, click **Next**.
- If a device is found, then the user can select **Search for installed modems?** and click **Next**. Any modems detected will be listed in the top pane on the resulting dialog. If the modem you want to install is listed, select it and click **Add**.
- If the modem you want to install is not in the list, then go back to the previous page, select **Manually install other devices** and click **Next**.
- To install a device other than a Generic Class 1 or 2 fax modem, select **Manually install other devices** and click **Next**.

You can manually install devices from the **Device Type** list. Click on a heading for more information:

[Brooktrout intelligent fax board](#)

[Windows printer](#)

[Fax modem](#)

[SMS device](#)

### To add a Brooktrout intelligent fax board port:

Select your board type from the **Device Type** list, click **Add** and enter the settings - you should add a separate Zetafax device for each port on the board.

**Note** : The relevant Brooktrout device drivers must be installed prior to installing a Brooktrout channel in the device configuration. More detailed information can be found in [Using Zetafax with Brooktrout fax boards](#).



### To add a Windows printer for automatic printing:

A Windows printer for automatic printing is installed by default. Should you need to add one for automatic printing of incoming and/or outgoing faxes: Select the item **Windows printer for automatic printing**, click **Add** and enter the description.



### To add a fax modem:

After selecting the item Fax modem (class 1 or 2) from the list, click **Add**: In **Device Configuration Wizard - Special Devices**, select your fax modem (Class 1 or 2) if it is in the list or select **(Not in list)** and click **Next**. Specify the settings for the modem. From the **Device options - Fax modem** dialog box select which COM port the modem is attached to.

A dial prefix may be specified if your modem is connected to a PBX extension. You can configure the modem to be used for incoming calls, outgoing calls or both. The number and organization names to

appear on the fax header line may be specified. Click **All Settings** for other settings and **Advanced Options**.

**Note** : To receive inbound faxes, Zetafax requires modem exclusivity, i.e. the modem should not be shared with a remote access service or any other software.



### Device Demo Mode

Zetafax requires interfacing with various types of fax modems and intelligent fax boards, it is often useful to be able to use a demonstration device to test the basic functionality of Zetafax without having to setup an actual hardware device. This has been facilitated by the inclusion of a new device type, this Demonstration Device is installed much like a standard hardware device using the Device Configuration Wizard.

Upon opening the Device Configuration Wizard if no Generic Class 1 or 2 fax modems are found, click **Next** in the **Start** dialog. Then select the option **Demonstration Fax Device** and select **Add**.

The Demonstration Fax Device should be set to connect to the DemoPort which should be automatically selected, if not it is located at the bottom of the available com port list. When DemoPort is selected many of the other options will no longer be accessible as they are predetermined when using the DemoPort.

On addition of a Demonstration Fax Device you will be warned that this device will work in Demonstration mode and will only simulate the sending of faxes, select **OK** to continue.

The Demonstration Fax Device will now enable the testing of Zetafax functionality.

### To add an SMS device:

Select **SMS device** (GSM modem) from the list, click **Add** and enter the settings. The settings are outlined in [Device Configuration Wizard - SMS Settings](#).

### Related topics

[Device Configuration Wizard](#)

[Advanced device options](#)

[Using letterheads](#)



## Advanced device options

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The **Advanced options** dialog allows you to specify additional options for the device:

You can configure which action should be taken if fax transmission is interrupted. The modem speaker can be turned on and off. Default baud rates for sending and receiving faxes can be specified. In addition, you can select which fax protocol (if applicable) your modem should use when sending and receiving.

### Service class

The service class of the fax modem describes how a PC fax application communicates with the fax modem. The most common classes of fax modem are Class 1, Class 2, and Class 2.0. These classes are specified as extensions to the Hayes command set.

The Zetafax Server supports service Classes 1, 2 and 2.0. When you select a modem to add from the list, Zetafax will attempt to use the modem in Class 1 mode (if supported). If you experience problems with your fax modem operating in Class 1, and your modem also supports Class 2/2.0, where the fax protocol negotiation is controlled by the Zetafax Server:

- Check the **Use Class 2/2.0** check box in the **Advanced options** dialog.

This may improve performance with some modems.

### Related topics

[Device options](#)

[Using Zetafax with Brooktrout fax boards](#)

[Using Zetafax with the HP Digital Sender devices](#)



## Automatic printing

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The Zetafax Server can be configured to print every fax sent or received automatically, with a status page which gives transmission details. You can choose whether to print 1, 2 or 4 fax pages per printed sheet to save paper.

To configure automatic printing you should enable the automatic printing options you require. These are configured using the **Zetafax Configuration** program.

### Adding a printer

To use automatic printing, you must have one or more print devices configured on the Zetafax Server. To do this:

- Launch the **Zetafax Configuration** program (**Start** menu, **Programs** submenu, **Zetafax** submenu).
- In the right pane, click on **Add device**.
- In the **Add new device** dialog that appears, set the **Device to add** control to **Windows printer for automatic printing**.

The **device options** dialog will be displayed. You can also display this to change the settings on an existing print device by right-clicking the device and clicking the **Edit** menu item.

You should give the printer a simple description (which is displayed on the Zetafax Server main screen).

### Configuration

After adding one or more PRINT devices, you should select which sent and received faxes are to be printed by default. (The default may be overridden per user.) To do this for sent faxes: Under **Server settings** in **Zetafax Configuration**, double-click **Automatic printing of sent faxes**.

The **Automatic printing of sent faxes** dialog will appear. Make any changes you require to the settings. Click **OK**.

Only faxes sent successfully will be printed.

To select which received faxes are to be printed: In **Server settings**, double-click **Automatic printing of received faxes**. Make any changes you require to the settings. Click **OK**. Per-user printing

The default settings may be overridden for each user and for each user group.

To make overriding setting for a user or user group: In the **Zetafax Configuration** folder, click **Users and user groups**. Click **Zetafax users** or **Zetafax groups**. In the right pane, click the user or group for the settings for which you want to change. In the **Zetafax User Details** dialog, click **Printing...**. In the **Printing** dialog that appears, make any changes you require. Click **OK**. Using letterheads

When using letterheads for your faxes, you need to configure the Zetafax printer. See [Print setup](#) for more information.

### Related topics

[Automatic printing of received faxes](#)

[Automatic printing of sent faxes](#)

[User edit - printing](#)

[Advanced Printer Settings](#)



## Device Configuration Wizard

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The **Device Configuration Wizard** can automatically detect any Generic Class 1 or 2 fax modems installed on your computer. It is recommended that you use this option, as it will simplify device configuration. If you have an intelligent fax board (e.g. Brooktrout), choose **Manually install other devices?**.

The following two options only appear if the wizard has detected a physically installed device on your machine that is not configured:

### **Search for installed modems?**

Select this option to have the wizard search for installed modems. Any devices found are displayed in the [Device Configuration Wizard - Found Devices](#) dialog.

### **Manually install other devices?**

Select to choose the device you wish to configure in the [Device Configuration Wizard - Other Device Types](#) dialog.

### **Next**

Click this button to carry out the selected action or begin device configuration.

### **Cancel**

Click to exit the wizard without making any changes to the Zetafax device configuration settings.

### **Related topics**

[Devices](#)

[Configuring devices](#)

[Device Configuration Wizard - Introduction](#)

[Device Configuration Wizard - Special Devices](#)

[Device Configuration Wizard - Printer Settings](#)

[Device Configuration Wizard - SMS Settings](#)

[Advanced device options](#)

[Automatic printing](#)

[Using Zetafax with the HP Digital Sender devices](#)

[Using Zetafax with intelligent fax boards](#)

[Hardware requirements](#)



## Fax over IP (FoIP)

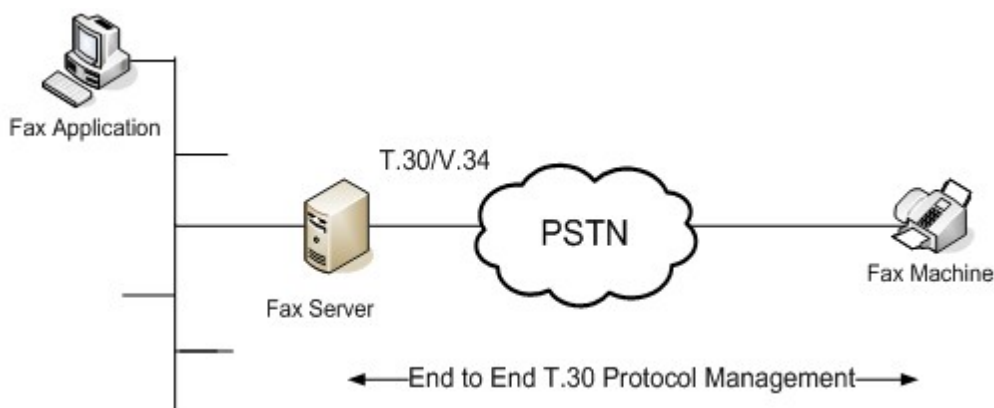
FoIP (Fax over Internet Protocol) is a new technology that allows faxes to be sent over an IP network rather than the traditional PSTN network thus reducing the cost per document sent. With FoIP the user experience remains largely the same, if transmitting IP fax to another IP fax users then you can still input a phone number however it is just an alias for the IP address of the IP fax server. Zetafax works in conjunction with the Zetafax FoIP Connector to achieve this and comes in two options the [Zetafax FoIP Connector Standard](#) and the [Zetafax FoIP Connector SR140](#).

### Features of Software IP faxing

- Reduced complexity, lower maintenance costs
- No boards to install/maintain, no T1/E1 lines to configure
- Works just like traditional, real-time faxing
- Delivers the same level of quality and real-time capability and confirmation you get from your fax machine
- Reliable Faxing

### Fax Background

When sending a fax message the "caller" and "called" fax machines have to communicate and understand each other, the way they do this is by using the T.30 protocol, much like 2 people talk having a conversation in the same language.



Standard Faxing Diagram

The T.30 protocol is made up of 5 different phases which fall into 2 categories; call control and image transfer. The call control handles various different factors of the call control, such as what speed to transmit at, whether to use error correction etc. The image transfer handles the transfer of document which has been converted into a TIFF image.

T.30 relies on a permanent connection between the 2 devices to ensure the fax is transmitted correctly. If the connection is lost or delayed for a long period of time (above 6 seconds) the fax fails. The network that connects the 2 devices is known as the PSTN network – the telephone network.

### The Future

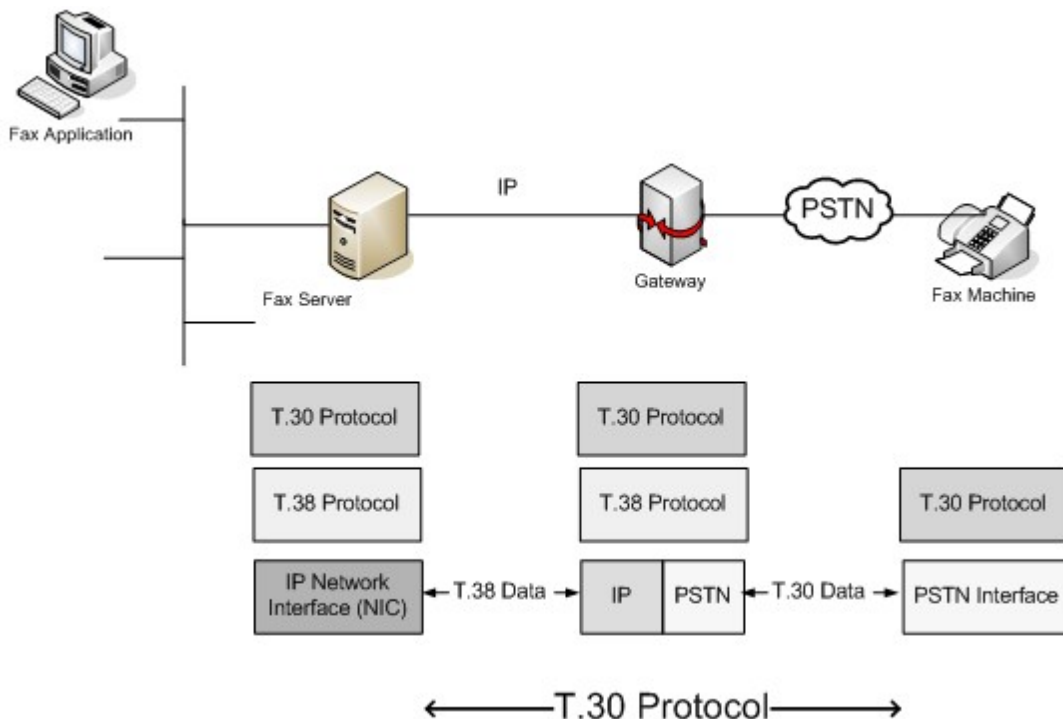
As more and more businesses migrate to VoIP solutions, the infrastructure that once catered for faxing is no longer available, as VoIP doesn't require a separate legacy network (PSTN) to carry analogue traffic. VoIP solutions make use of networks that are already in place - computer networks. These networks operate differently from telephone networks, they do not create permanent connections between devices to communicate, instead they transmit packets that could take any path to find its destination.

With this new challenge, faxing had to find a way to send faxes over an IP network. This was achieved by implementing a new protocol, which is called T.38.

T.38 allows fax messages to be sent over an IP network, the messages are sent to some sort of gateway



(a gateway connects 2 different types of network together – in this case an IP network to a PSTN network).



T.38 diagram

It is important to remember that the T.38 protocol doesn't replace T.30, it sits on top of it, and makes it compatible for transmission over a computer network. Once the data reaches the gateway, the message is transmitted in the T.30 protocol, which means normal fax machines are still able to communicate to the new IP fax machines/servers.

Zetafax supports both of Eicons implementation of Soft IP (H323 and SIP), and Brooktrout's TR1034 FoIP enabled fax board, which means that businesses planning to migrate to VoIP, or were cautious of doing so due to faxing compatibility are now able to take advantage of this new technology.

### H.323 – IP Telephony

H323 was designed by the International Telecommunications Union; it was the first of the 2 technologies. It is a collection of different standards that make VoIP possible, these include:

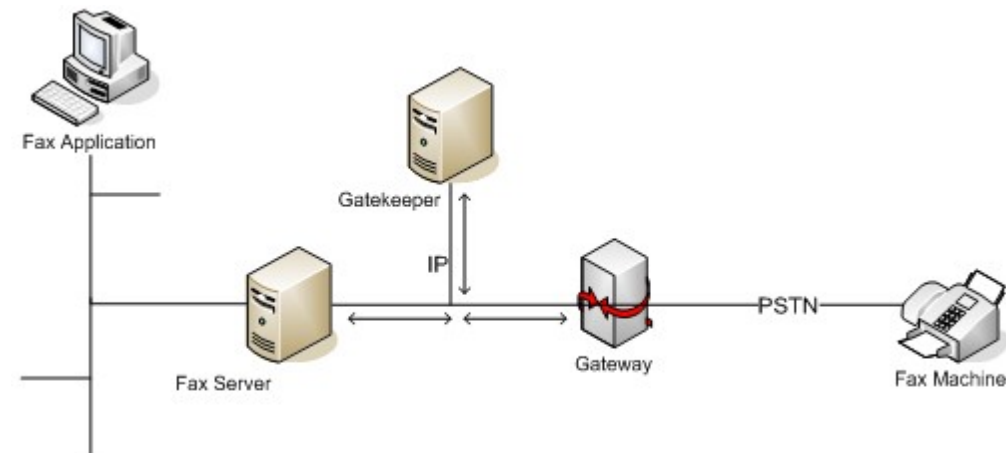
- H.225 Registration, Admission, and Status
- H.225 Call Signaling
- Real-Time Transport Protocol
- Real-Time Transport Control Protocol

#### H.323 Components

Terminals – real time bidirectional multimedia communications (PC or H323 Application)

Gateways – connects 2 different networks i.e. SIP compatible LAN à PSTN

Gatekeepers – Addressing, authorizing & authentication



H323 diagram

**Gatekeeper's Role:**

- Address Translation
- Admissions Control
- Bandwidth Control
- Zone Management
- Call Control Signalling
- Call Authorization
- Call Management

**SIP – Session Initiation Protocol (Defined by the Internet Engineers Task Force)**

SIP is the newer of the 2 IP telephony technologies; it takes a top down approach for the communication between the 2 end users. SIP creates a session over the IP network and uses SIP commands to setup the call.

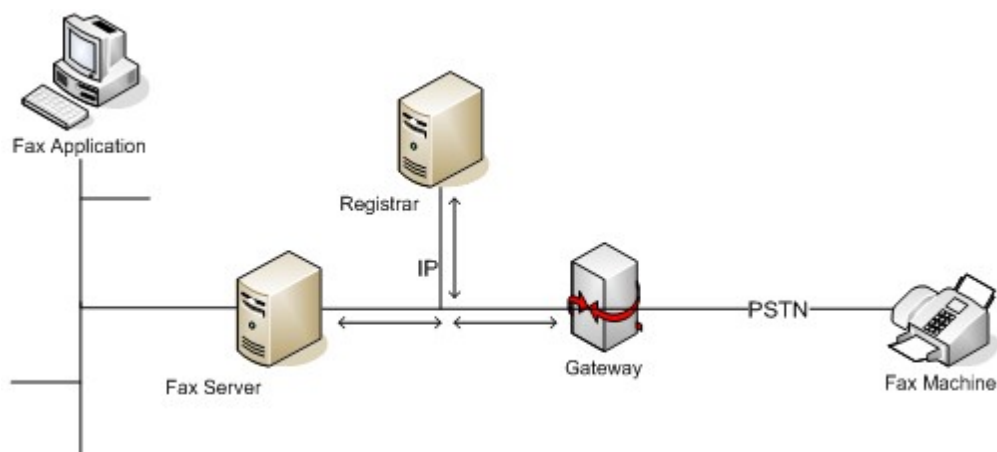
**SIP Details**

- Session Initiation Protocol, defined by the IETF: RCF2543
- Call control (signalling) protocol
- Creates a session over packet networks for media
- Independent of lower-layer transport protocols
- Series of ASCII/Text messages similar to HTTP
- SIP call control protocol establishes session connection
- SDP – Session Description Protocol – describes the media that will be established

SIP sessions use T.38 protocol to carry fax media - SIP & T.38 FoIP is defined in ITU-T T.38 Annex D

**Components**

- User Agent - Endpoint Entity which issues/accepts SIP commands (Software or hardware phone)
- Registrar (optional but recommended) - Accepts REGISTER requests, Updates location database with the contact information for the user
- Proxy Server (optional) –Makes requests on behalf of clients, Address lookup
- Redirect Server (optional) –Accepts a SIP request, maps the SIP address of the called party to a new address and returns it to the client



SIP diagram

**Registrar's role**

Dynamically build's a table of registered User Agents

**Definitions**

- IP – Internet Protocol
- VoIP – Voice over Internet Protocol
- FoIP – Fax over Internet Protocol
- PSTN – Public switched telephone network
- LAN – Local Area Network
- T.30 – Analogue protocol used to control and transmit faxes
- T.38 – Digital protocol that allows faxes to be passed over a data network

**Related topics**

[Installing the Brooktrout SR140](#)

[Installing the Brooktrout devices and drivers](#)

[Configuring Brooktrout devices for use in Zetafax Server.](#)

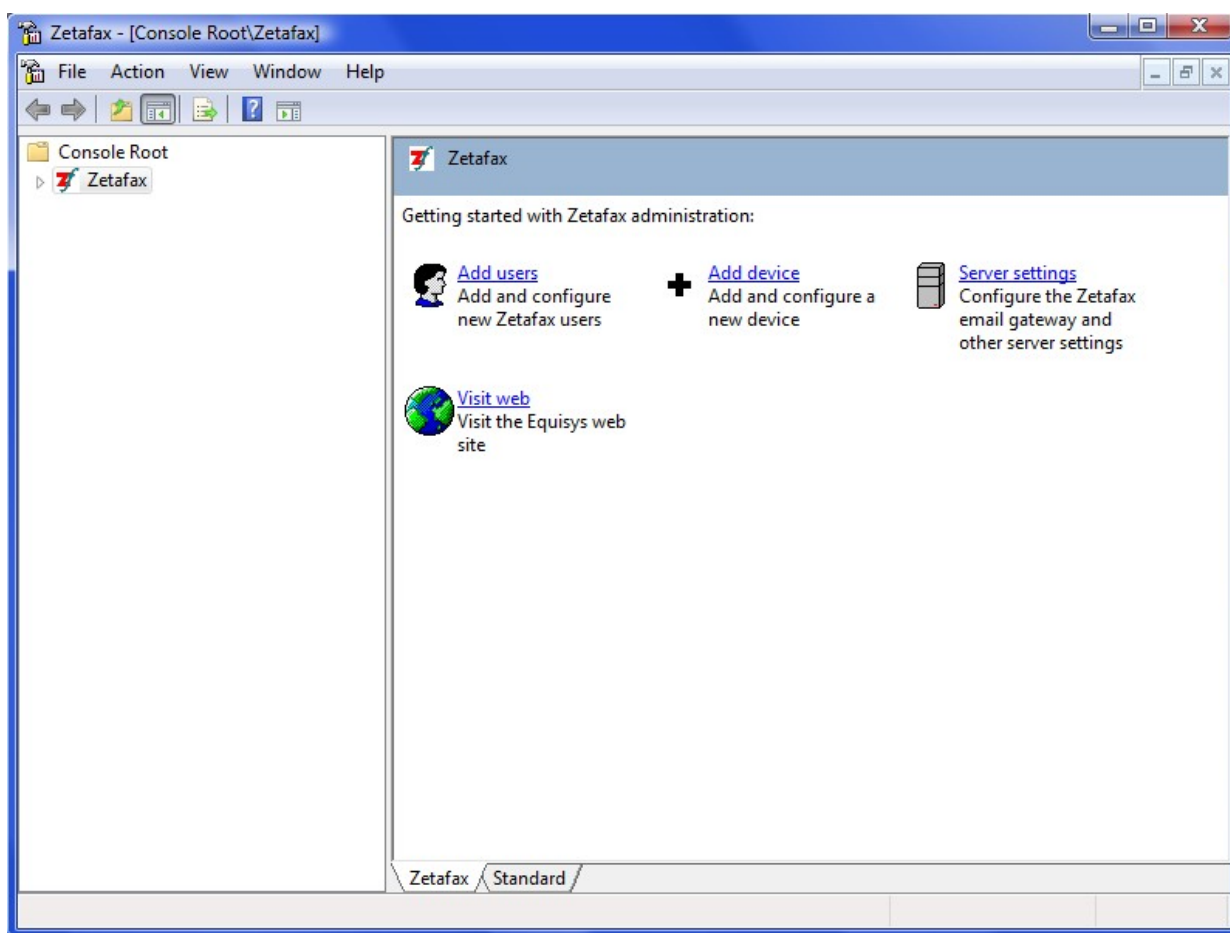


## Installing the Zetafax FoIP Connector (Standard Edition)

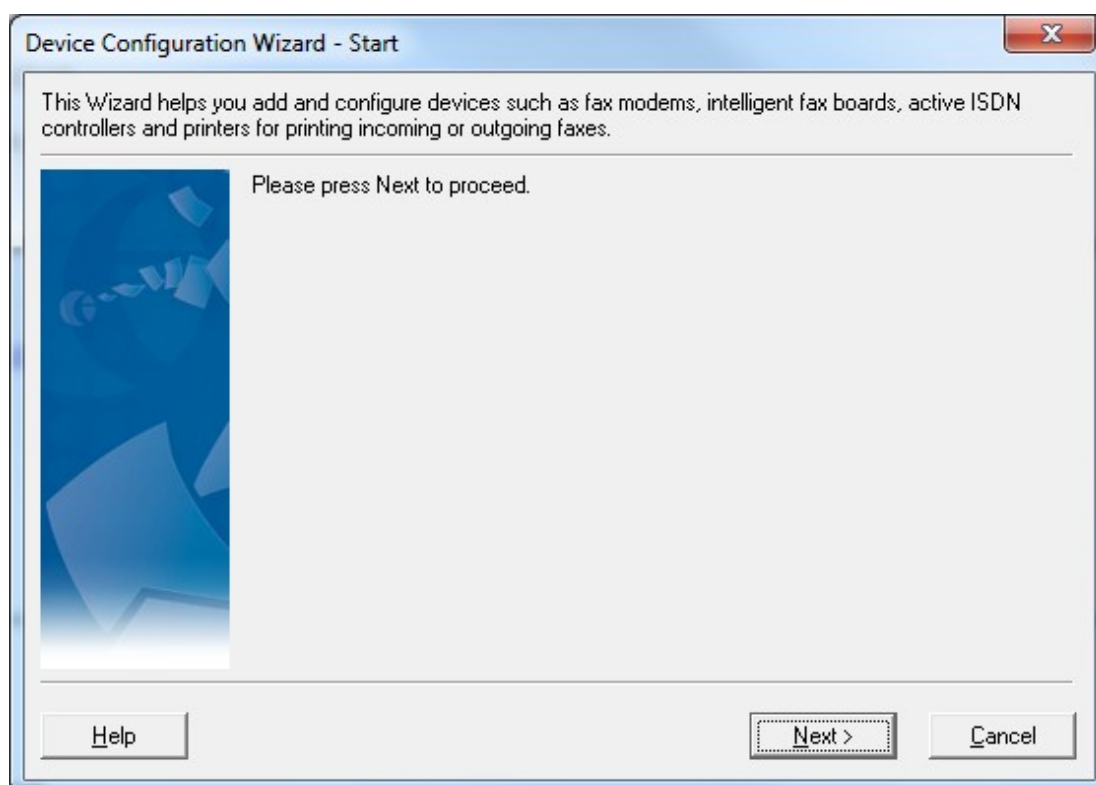
The Zetafax FoIP Connector Standard Edition provides the capacity to send and receive faxes via a VoIP compatible PBX or gateway. It provides Fax over IP (FoIP) capabilities for integrating fax servers and fax document management solutions.

### Installing Zetafax FoIP Connector Standard Edition

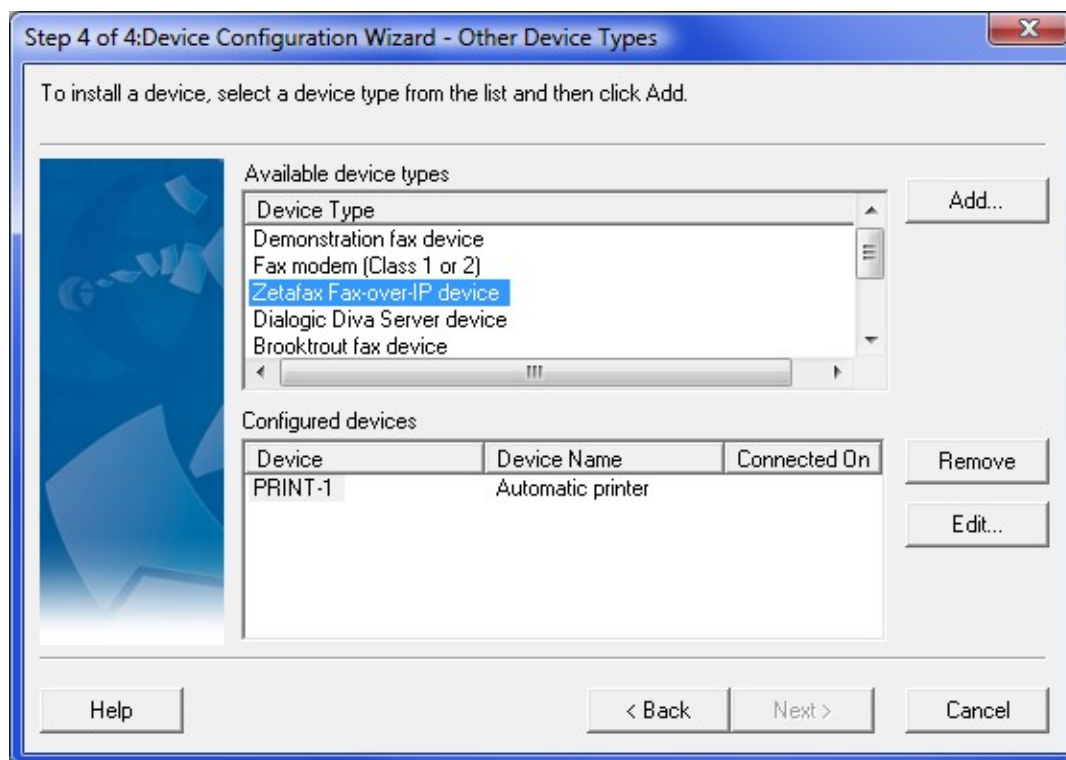
1. Open the **Zetafax Configuration** from the start menu.
2. Select the **Add device** option and the Device Configuration Wizard will open.



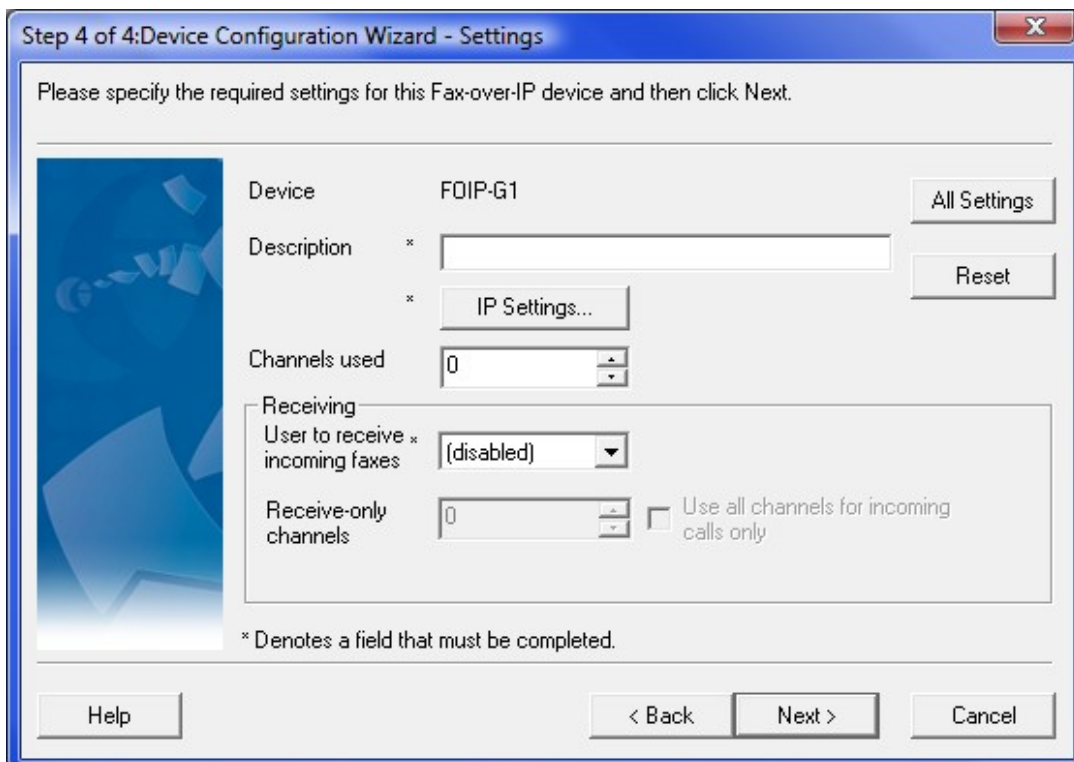
3. Click **Next** to start the Device Configuration Wizard.



4. Select the **Zetafax Fax-over-IP** device option from the list of device types and select **Next**.



5. The Device Configuration Wizard Settings dialog will appear, specify a Description to identify the device.
6. In the **Channels used** setting you need to specify the number of lines on the device you wish to utilize on the device up to the total number available on the device (these may not be the same value if you have a partial PRI line or a limited line licence).
7. Next you need to select the default **User to receive incoming faxes** if you wish to receive faxes on this device. You can also choose to set a certain number of **Receive-only channels** or check the **Use all channels for incoming calls only** if you won't be sending faxes. If you wish to make all channels outgoing only, set the default user to receive faxes to **(disabled)**.



Step 4 of 4: Device Configuration Wizard - Settings

Please specify the required settings for this Fax-over-IP device and then click Next.

Device: FOIP-G1 All Settings

Description \*  Reset

\* IP Settings...

Channels used:

Receiving

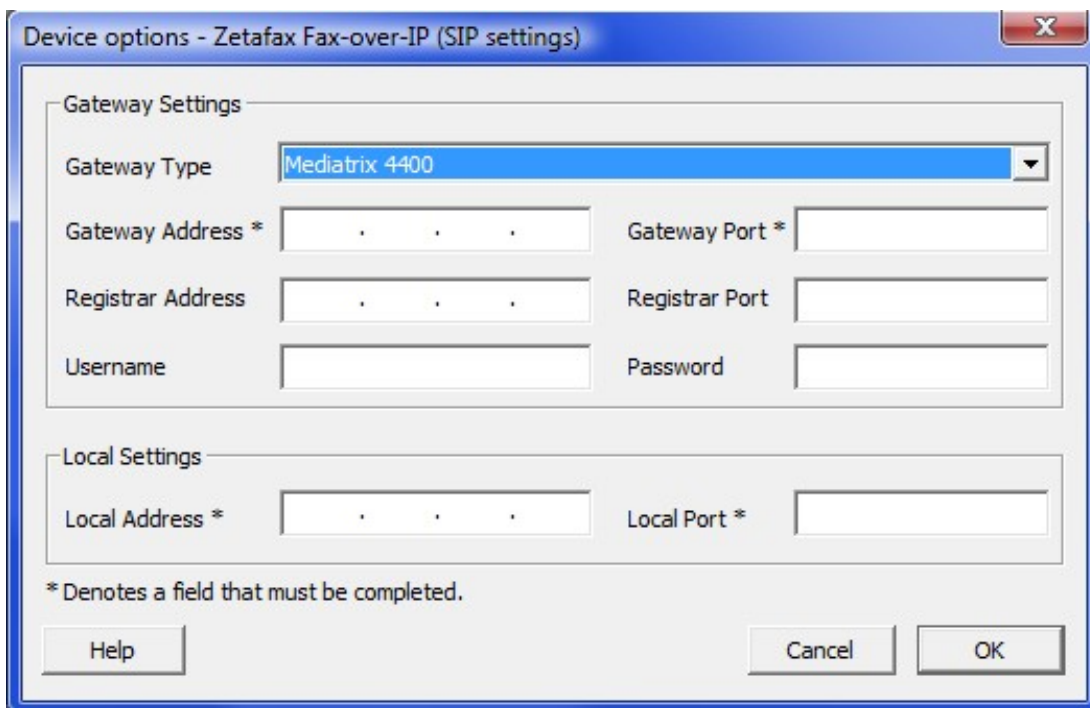
User to receive \* incoming faxes:

Receive-only channels:  ☐ Use all channels for incoming calls only

\* Denotes a field that must be completed.

Help < Back Next > Cancel

8. Select the **IP Settings** button to open up the Zetafax Fax-over-IP (SIP settings) window.



Device options - Zetafax Fax-over-IP (SIP settings)

Gateway Settings

Gateway Type:

Gateway Address \*    Gateway Port \*

Registrar Address    Registrar Port

Username  Password

Local Settings

Local Address \*    Local Port \*

\* Denotes a field that must be completed.

Help Cancel OK

9. Select the appropriate **Gateway Type** from the drop down box, add the **Gateway Address** e.g. 192.168.0.105.
10. Next add the **Gateway Port** value (SIP), a typical default value of 5060 is pre-populated in the field, see your Gateway Instruction materials for further information.
11. Add **Registrar Address and Port** if required.
12. Specify a **Username** and **Password** as per your requirements.
13. In the Local Settings section provide the **Local Address** of your Zetafax Server as well as the **Local Port** (SIP) (default value 5060).
14. Click **OK** when you have finished the setup.
15. This will return you to the Device Configuration Wizard Settings screen, if you have completed setting up this device click **Next** to continue.
16. The Device Configuration Wizard Settings screen will appear, if you have completed setting up all the required devices click **Next** to continue, otherwise select the type of device you wish to setup and complete the above steps again as required.

### Advanced Setup

1. If your system requires a more advanced setup click the **All Settings** button shown below on Configuration Wizard Settings screen.

Step 4 of 4: Device Configuration Wizard - Settings

Please specify the required settings for this Fax-over-IP device and then click Next.

Device: FOIP-G1

Description: \*

IP Settings...

Channels used: 0

Receiving

User to receive \* incoming faxes: (disabled)

Receive-only channels: 0

Use all channels for incoming calls only

\* Denotes a field that must be completed.

Buttons: All Settings, Reset, Help, < Back, Next >, Cancel

2. This will open the Device options window, to access the Advanced Settings click the **Advanced...** button.



Device options - Zetafax Fax-over-IP device

Device: FOIP-G1

Description: \* Equisys FoIP System

Channels used: 0

IP Settings... Advanced... Reset

Receiving

User to receive incoming faxes: (disabled)

Receive-only channels: 0 ☒ Use all channels for incoming calls only

\* Denotes a field that must be completed.

Help OK Cancel

3. The window shown below will appear, this allows you to specify the Advanced settings.

Device options - Zetafax Fax-over-IP device

Sending

Dial prefix for external calls (eg '9,'):

Fax number on header line:

Organization name on header line: Equisys

Error conditions

Action if transmission is interrupted:

☐ Redial immediately AND:

Resend first page then continue

Maximum baud rate

(default)

Help Cancel OK

4. Set the options as required, note the default maximum baud rate is 14400 which is the maximum value. Once you have specified the required settings select **OK**.

5. You will be returned to the Device Configuration Wizard, when you are happy with the specified settings select **OK** and then **Next** to continue. To complete the installation simply select **Next** again and then

**Finish.**

**Related topics**

[Fax Over IP \(FoIP\)](#)

[Devices](#)

[Configuring devices](#)

[Device Configuration Wizard - Introduction](#)

[Device Configuration Wizard - Special Devices](#)

[Device Configuration Wizard - Printer Settings](#)

[Device Configuration Wizard - SMS Settings](#)

[Advanced device options](#)

[Automatic printing](#)

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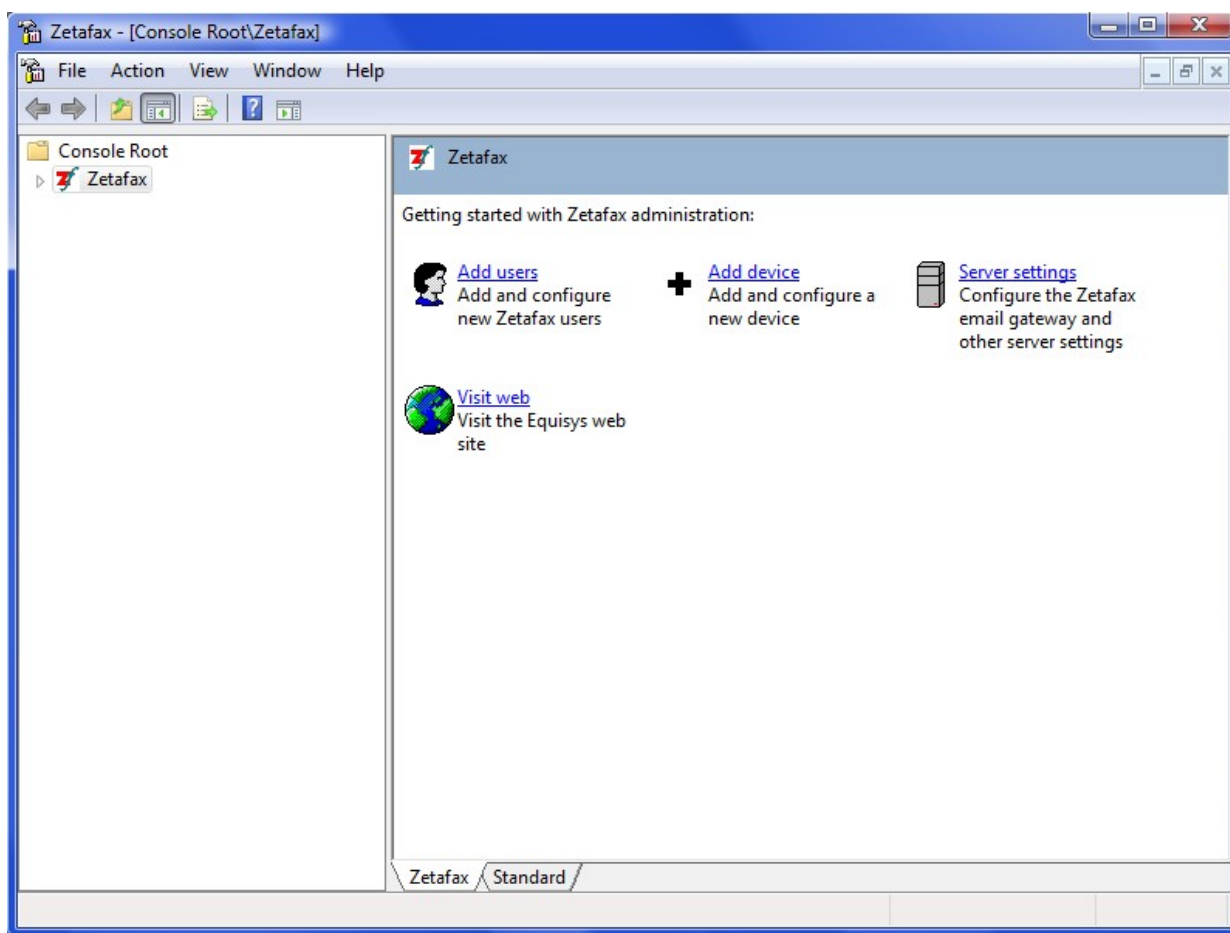
## Installing the Zetafax FoIP Connector (SR140 Edition)

The Brooktrout® SR140 Fax Software product provides the capacity to send and receive faxes via a VoIP compatible PBX or gateway. It provides Fax over IP (FoIP) capabilities for integrating fax servers and fax document management solutions.

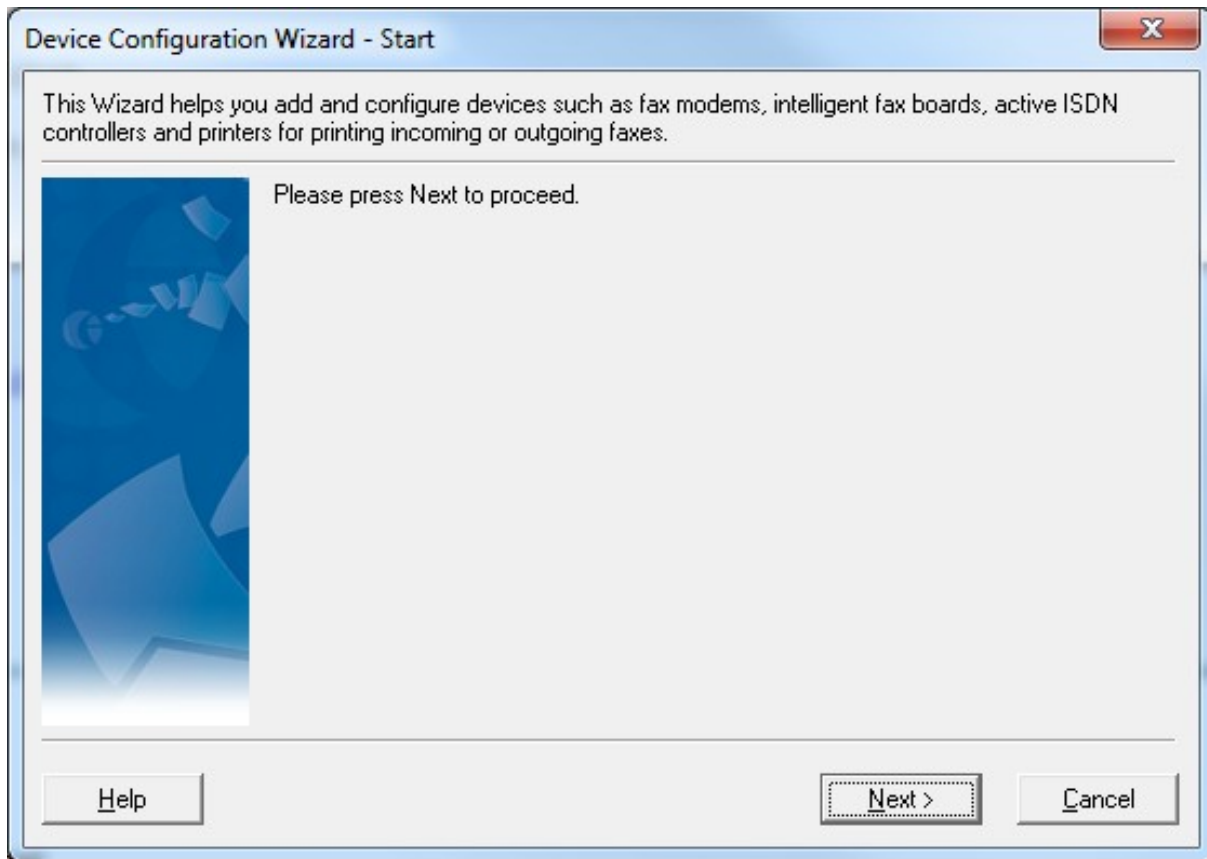
Brooktrout SR140 operates with the SIP and H.323 protocols, for more details on SR140 please see [www.diallogic.com](http://www.diallogic.com), to install the SR140 Fax software follow the steps below.

### Installing Brooktrout SR140

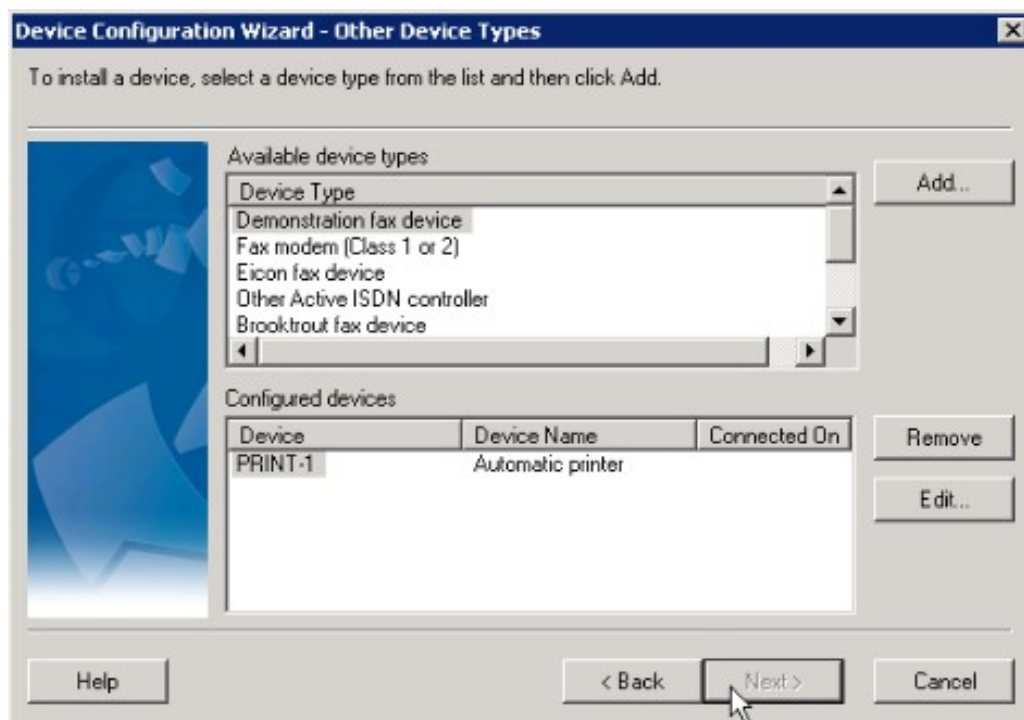
1. Open the **Zetafax Configuration** from the start menu.
2. Select the **Add device** option and the Device Configuration Wizard will open.



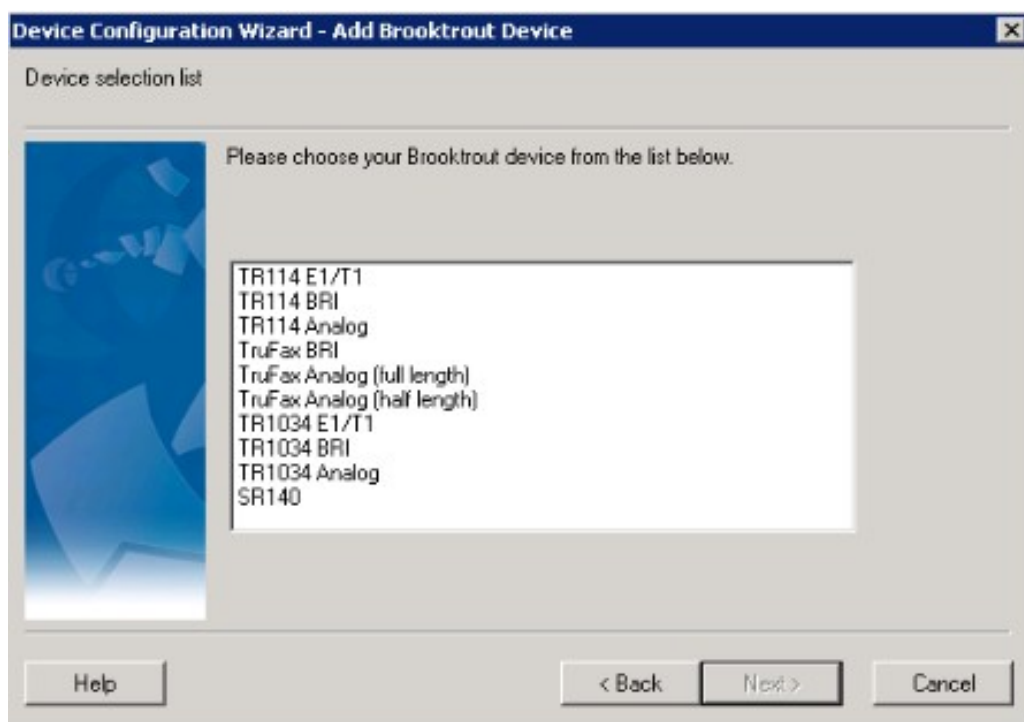
3. Click **Next** to start the Device Configuration Wizard.



4. Select the **Brooktrout Fax Device** option from the list of device types.



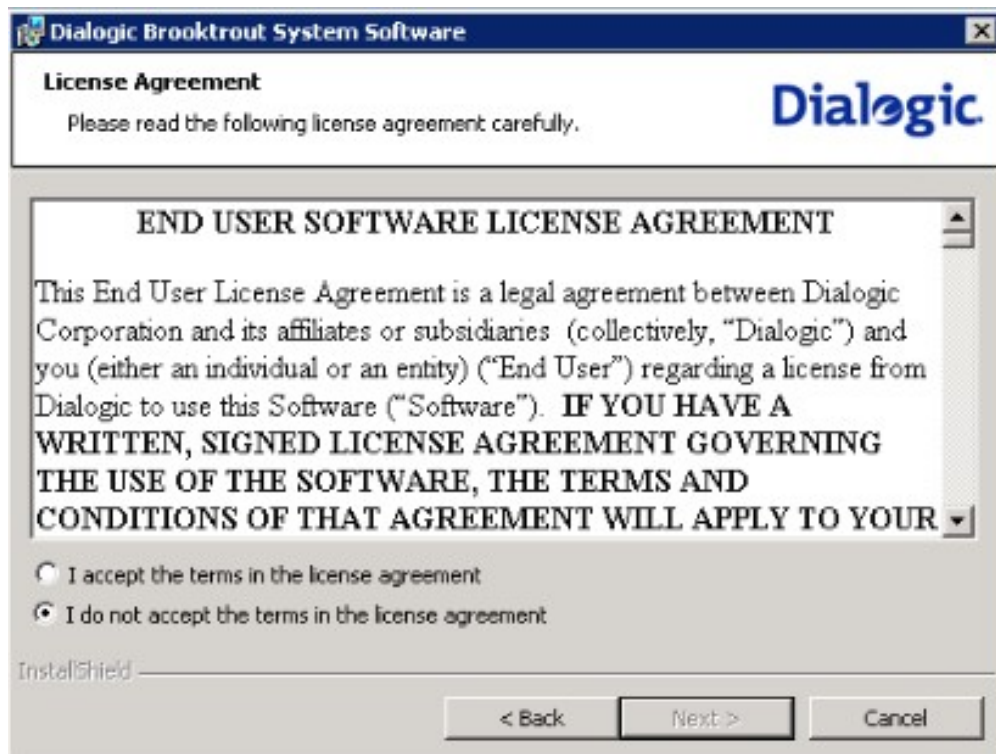
5. Select SR140 and then click **Next**. If you have previously installed Brooktrout drivers on your system the wizard may jump to step 11 if you do not need to update them.



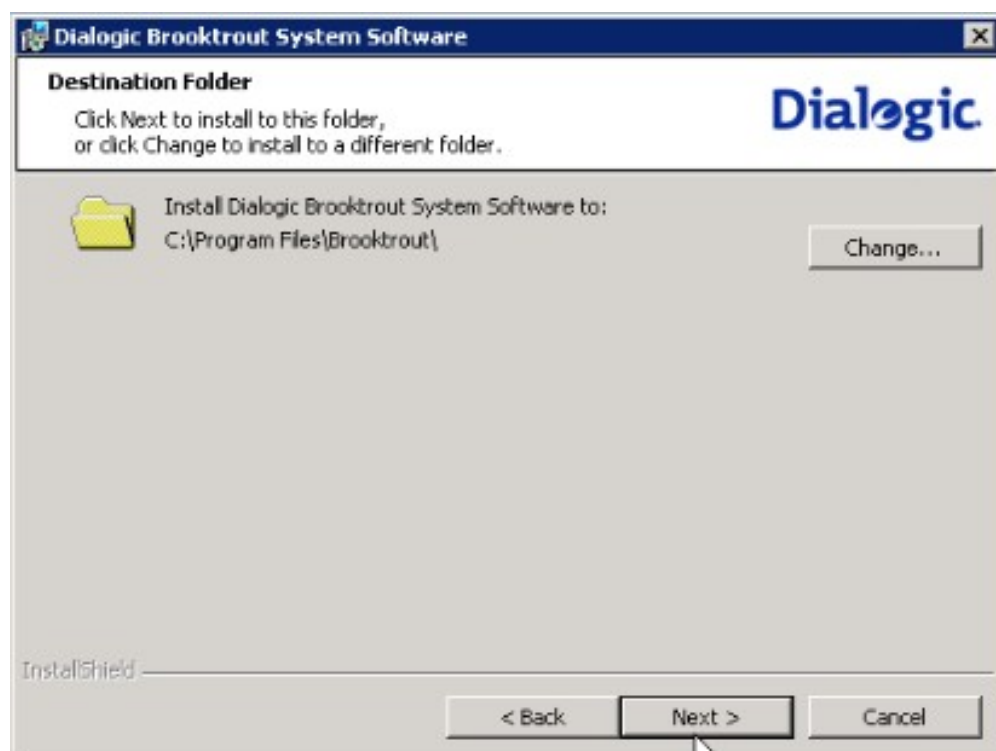
6. Select **Next** to launch the Brooktrout driver installer.



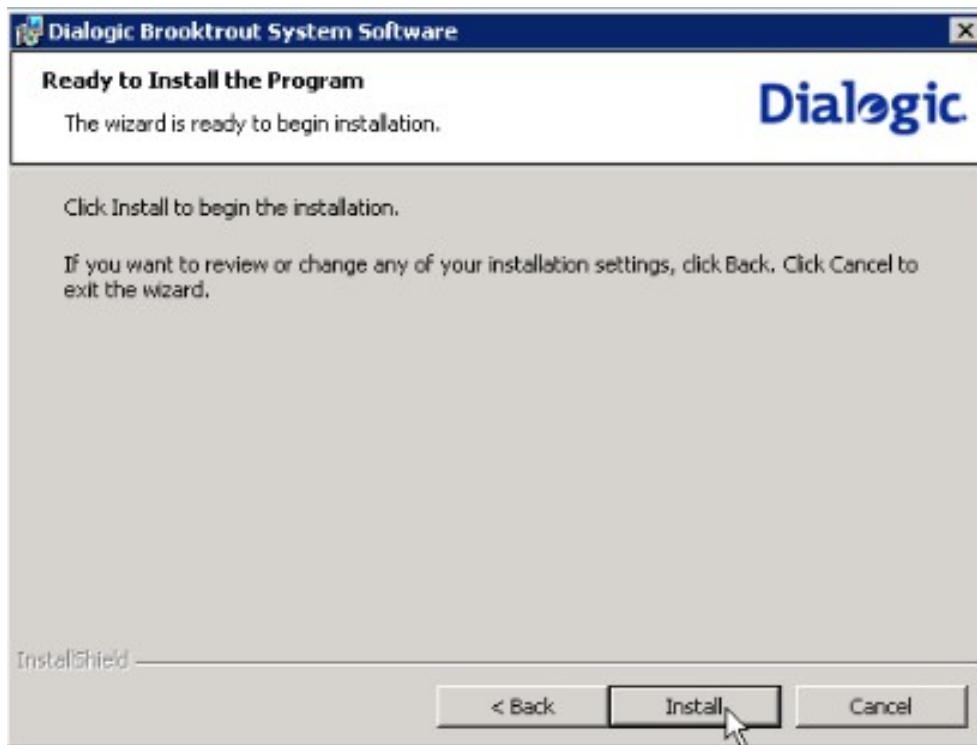
7. Select **I accept the terms in the licence agreement**, and click on **Next**.



8. Click **Next** to confirm the destination folder.

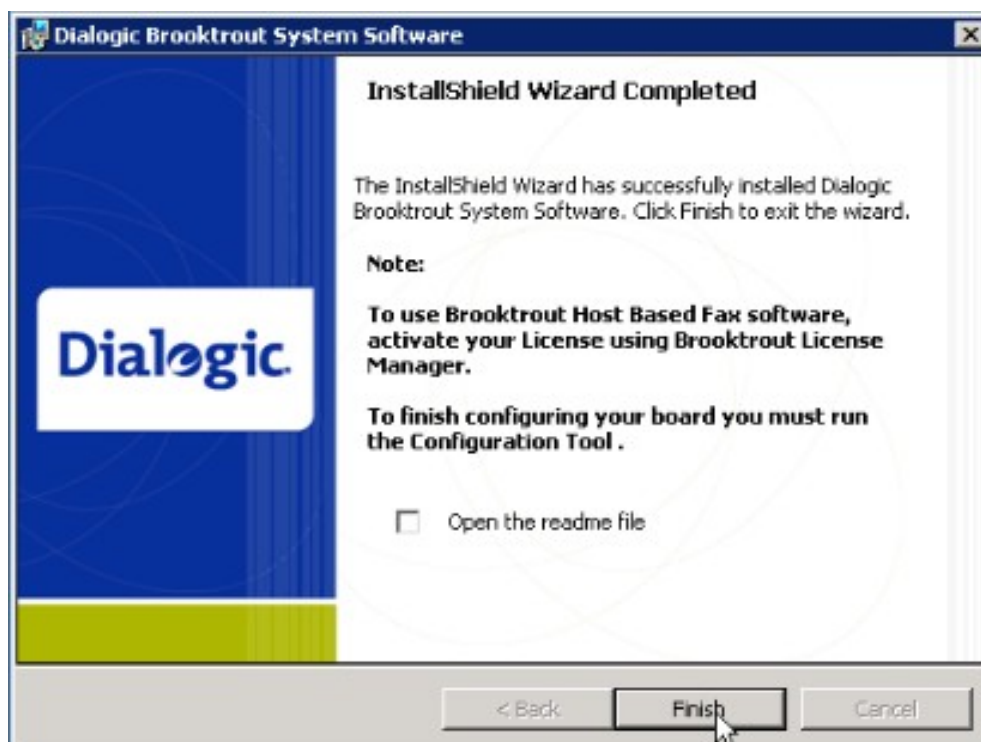


9. Click **Install** to start the installation.

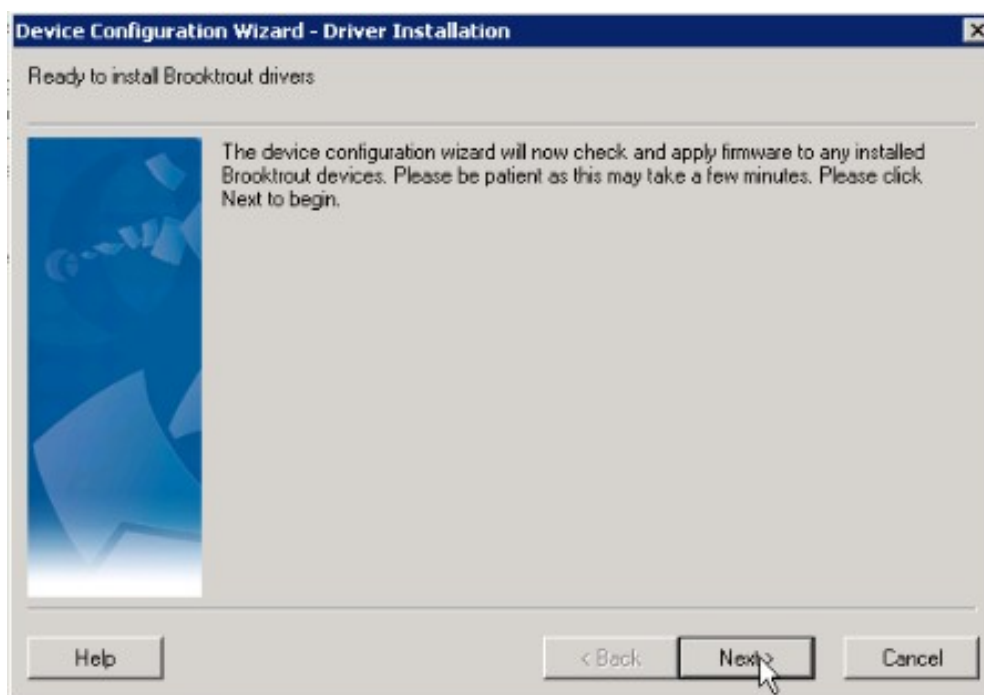


10. Select **Finish** to close the wizard. Now that you have completed the Brooktrout driver wizard we can continue with the device configuration.

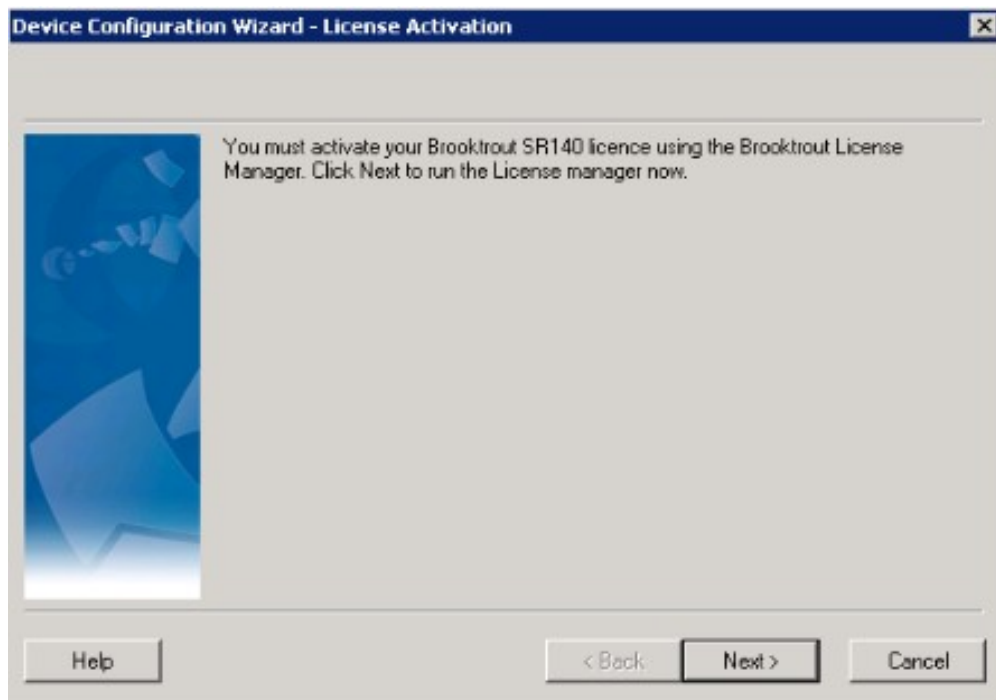




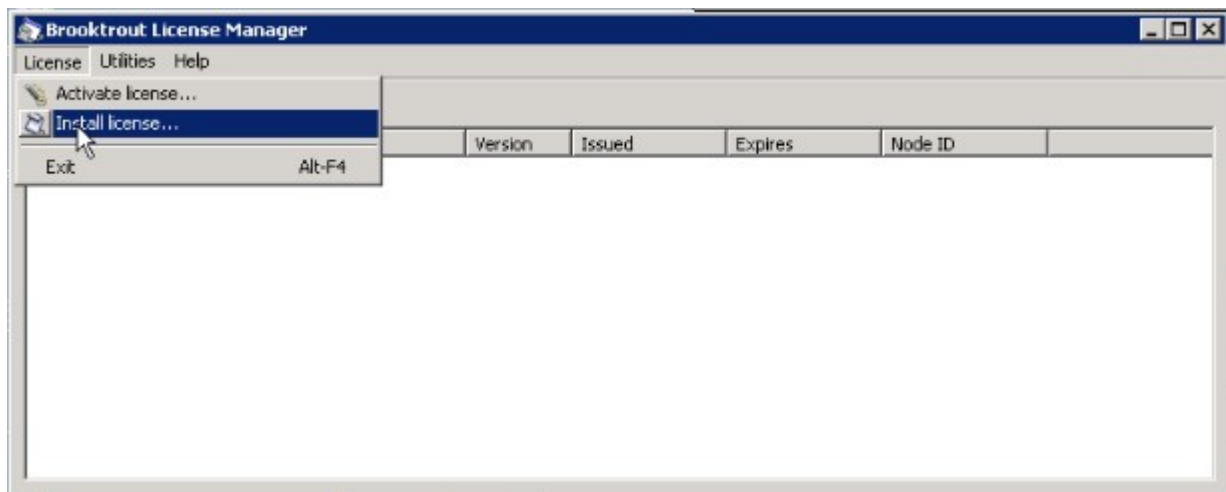
11. Select **Next** to apply the SR140 firmware.



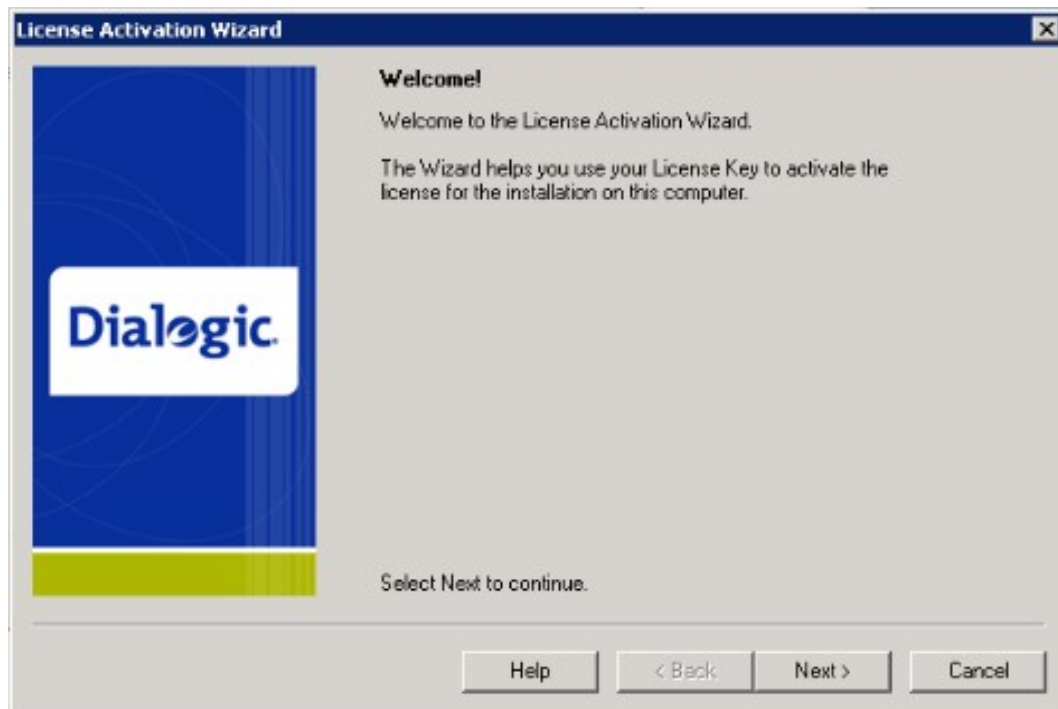
12. Once the firmware has completed installation you need to enter your SR140 license. To start this simply select **Next** to launch the Brooktrout license manager.



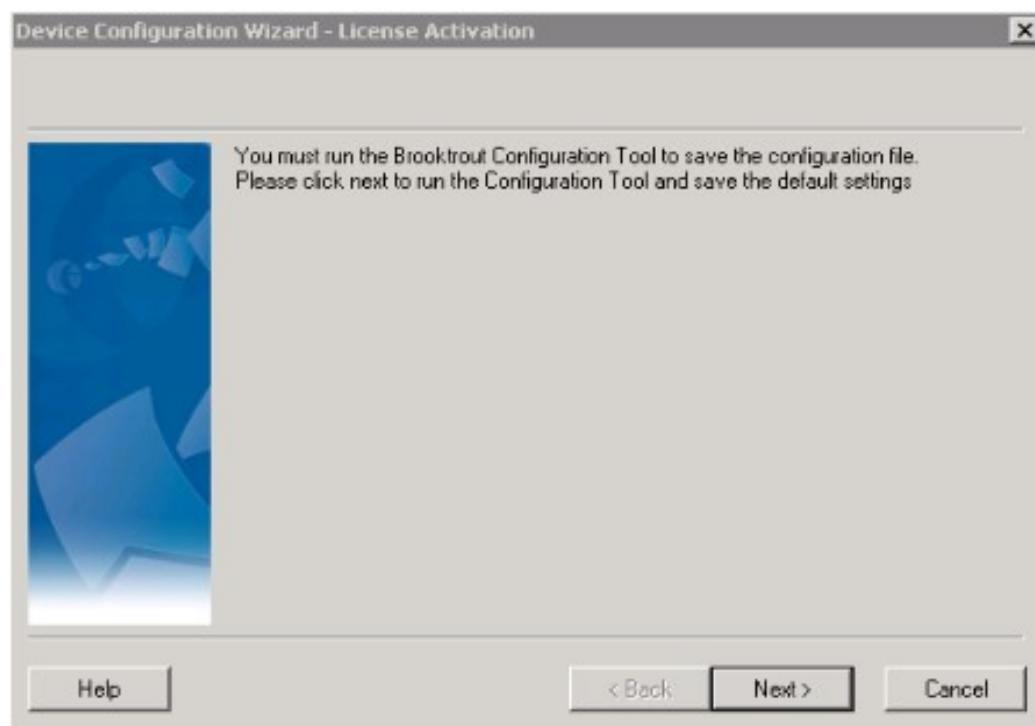
13. From the license menu select **Install License**. You will be asked to specify the location of your license file. Enter this and select **Open** to install the license.



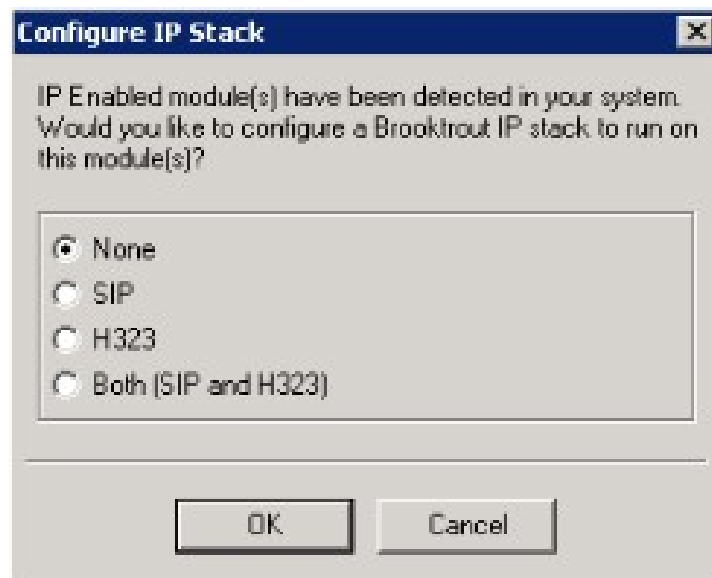
14. To activate your license, select **Activate License** from the License menu in the Brooktrout license manager and the Brooktrout License activation wizard will appear. For details on activating your Brooktrout license please see your Brooktrout user documentation.



15. Select **Next** to start the license activation wizard, precede through the wizard to register your license, see your Dialogic support materials for more information. Once complete return to the **Device Configuration Wizard**.



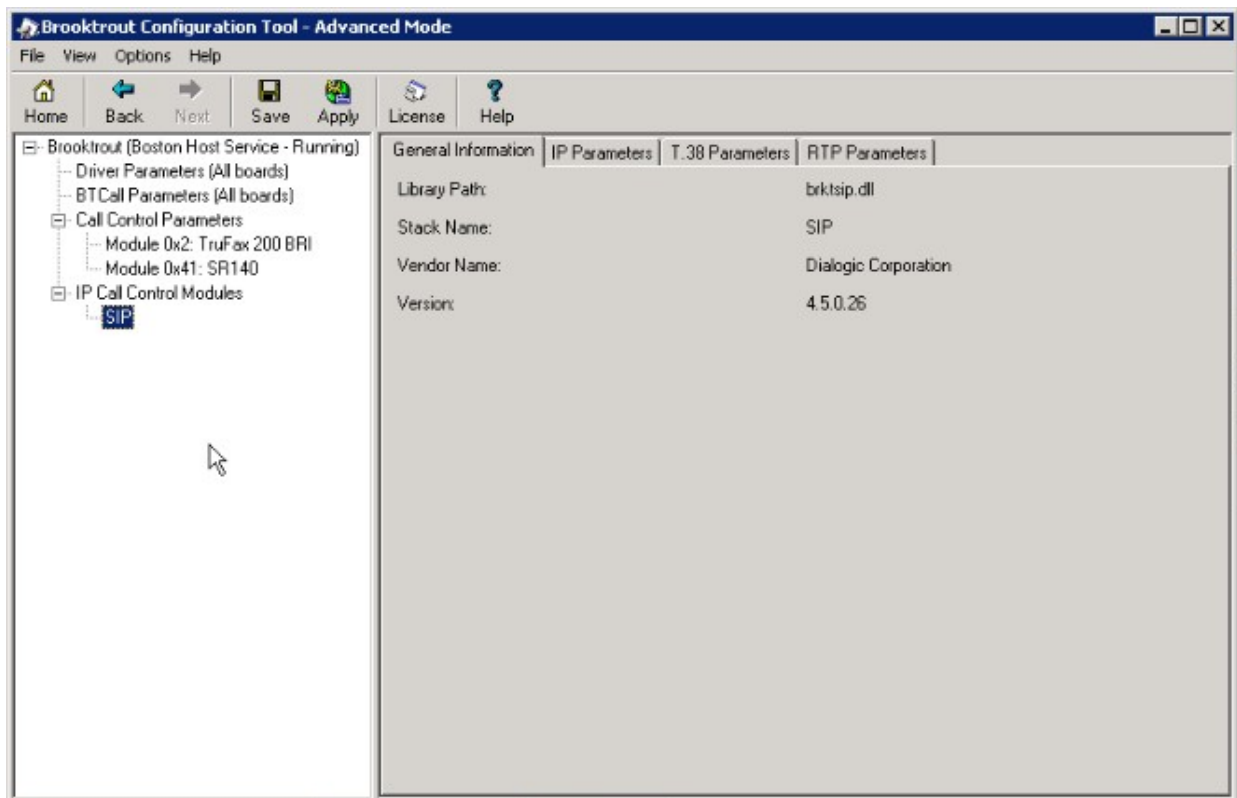
16. Select **Next** and the configuration tool will run, once complete you will be asked to determine the IP stack.



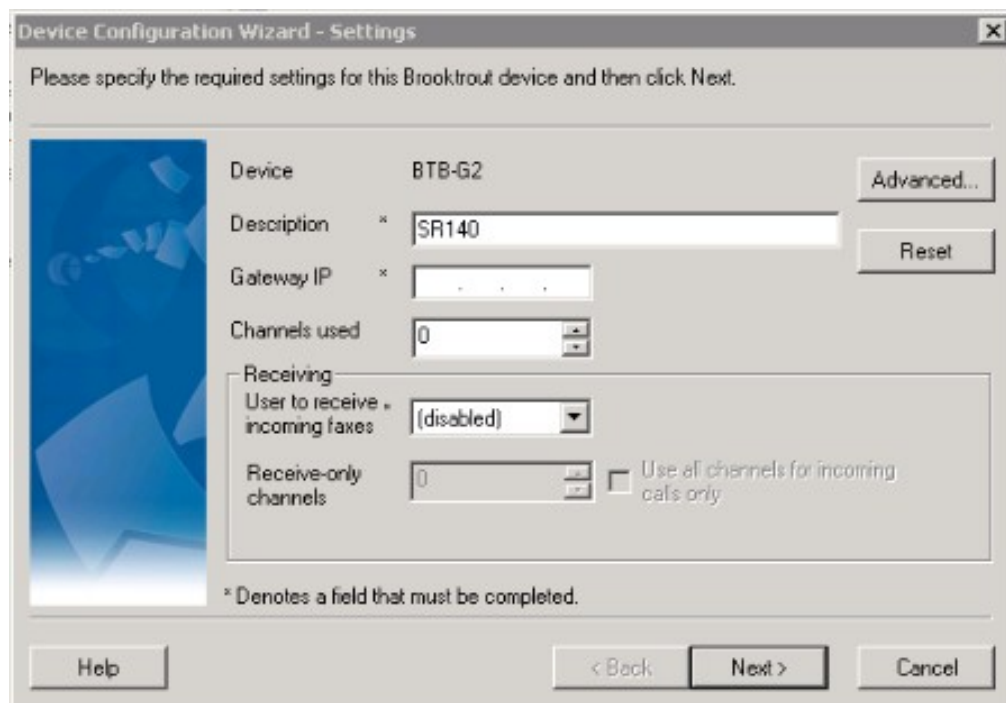
17. The SR140 setup can operate using either the Session Initiation Protocol (SIP) or by using the H323 protocol. Select the one that reflects your system setup and select **OK** to continue.

**Note:** It is currently not possible to utilise the **Both (SIP and H323)** option due to an unresolved issue with SR140 if this is selected the system will default to SIP.

18. This will open the Brooktrout Configuration Tool – Advanced mode to allow you to configure SR140 to work with the selected protocol. For basic configuration you will be able to utilise the default values, for more complex installs select the IP parameters tab and input the values as necessary (see step 25).



19. Select the type of protocol identified earlier and click **Save** then exit the configuration tool.



20. The Device Configuration Wizard will appear allowing you to specify the settings to be used. Should your system be relatively simple, for example a basic SIP system then enter the IP Gateway, Channels and user details. Otherwise continue from step 25 by leaving the Gateway IP blank and setting the IP using the Brooktrout driver configuration tool.
21. Select the **Device module number**, if you have multiple cards installed, you will need to make sure the correct module number has been selected for the card you are configuring.
22. In the **Channels used** setting you need to specify the number of lines on the device you wish to utilize on the device up to the total number available on the device (these may not be the same value if you have a partial PRI line or a limited line licence).
23. Next you need to select the default **User to receive incoming faxes** if you wish to receive faxes on this device. You can also choose to set a certain number of **Receive-only channels** or check the **Use all channels for incoming calls only** if you won't be sending faxes. If you wish to make all channels outgoing only, set the default user to receive faxes to **(disabled)**.
24. If your system has a more complex setup for example a proxy server select the Advanced Button to open the Brooktrout Advanced Configuration Tool.

#### Advanced Setup

25. If your system requires a more advanced setup click the **Advanced** button shown above.

**Device options - Brooktrout fax device port**

**Sending**

Dial prefix for external calls (eg "9,")  ☒ Use DTMF tone dialing

Fax number on header line  ☒ Detect busy (engaged) tone

Organization name on header line  ☐ Detect dial tone

**Error conditions**

Action if transmission is interrupted:

☒ Redial immediately AND:

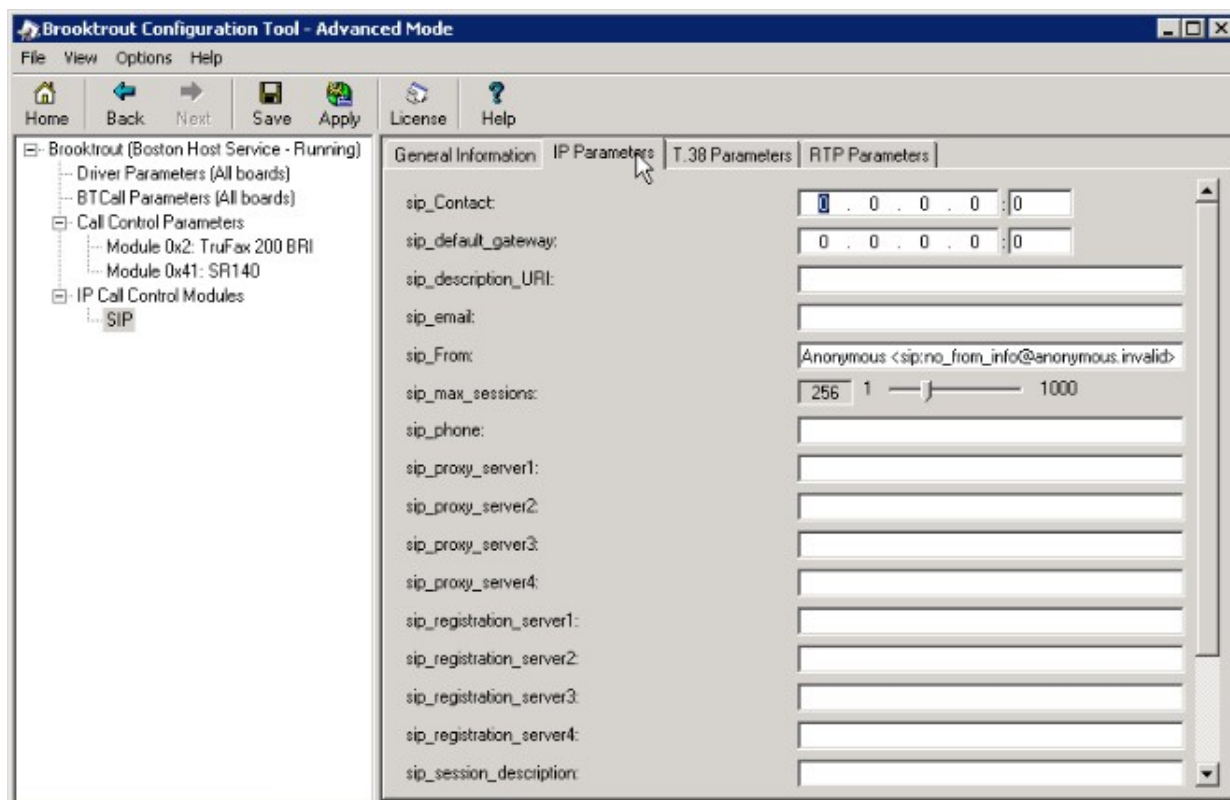
**Maximum baud rates**

Sending

Receiving

☐ Run Driver Configuration in Advanced Mode

26. Should you require still further configuration options select the **Driver Configuration Tool** button.



27. Add any remaining settings and select **Save** before closing the Configuration Tool.

28. You will be returned to the Device Configuration Wizard, when you are happy with the specified settings select **OK** to and then **Next** to continue. To complete the installation simply select **Next** again and then **Finish**.

#### Related topics

[Installing the Brooktrout devices and drivers](#)

[Configuring Brooktrout devices for use in Zetafax Server](#)

[Fax Over IP \(FoIP\)](#)



## Using Zetafax with intelligent fax devices

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These topics describe how to configure Zetafax to work with an intelligent fax device, instead of using a modem, to take advantage of the better compatibility and higher throughput that this type of device provides.

### Overview

With Windows 2003 (and in some instances Windows XP Professional) based fax servers, intelligent fax devices may be used in place of fax modems. These devices cost more per port than fax modems, but have a number of advantages:

- Better compatibility with remote fax machines and fax modems, leading to fewer dropped or failed calls.
- Reduced average call times through use of higher compression and shorter protocol handshaking times during calls.
- Higher density configuration for multiple fax line servers (intelligent fax devices can have a number of ports per device).
- Reduced processor load for the fax server.

Zetafax supports both ISA and PCI intelligent fax devices from leading manufacturers Brooktrout and Dialogic. Support for PCI devices simplifies installation of the device by providing 'plug and play' automatic configuration of system interrupts and device addresses.

### Related topics

[Using Zetafax with Brooktrout fax devices](#)





## Using Zetafax with Brooktrout fax devices

Zetafax can be used with Brooktrout intelligent fax devices under Windows Server 2012, 2008 or 2003 and Windows XP Professional. Used with Zetafax automatic inward routing, these support direct dial numbers using DID (Direct Inward Dialing lines) in North America, ISDN (in the rest of the world), or DTMF tones (from a Fax Router or PBX).

The Zetafax software includes all drivers and firmware required to use Brooktrout TruFax and TR1034 devices.

### Overview

This section gives instructions for installation and configuration required for using a Brooktrout device with Zetafax.

The stages of installing a Zetafax Server using Brooktrout devices are as follows:

- Install the intelligent fax device in the fax server PC and the Brooktrout device drivers, specifying where applicable the hardware settings which have been used.
- Install the Zetafax Server software from the Zetafax product CD.
- Specify the correct country code, and DID parameters (if required).
- Add and configure the fax device for use with the Zetafax Server.

These steps are described in more detail in the following sections:

[Installing the Brooktrout devices and drivers](#)

[Configuring Brooktrout devices for use in Zetafax Server](#)

**Note:** Additional information on installing and troubleshooting Brooktrout fax devices can be found in SERVER\BTROUT\ README.WRI in the Zetafax install folder.



## Supported Brooktrout Devices

Zetafax Server provides support for a variety of Brooktrout intelligent fax devices. The type of device that you choose should be based upon the Operating System that you install the Zetafax Server on and also on your faxing requirements. For more information on the available range of Brooktrout devices, you can visit the [dialogic website](#).

A list of supported Brooktrout devices is available on our website [here](#), we endeavour to update it regularly based upon the latest developments from Brooktrout and Equisys.

### Related topics

[Installing the Brooktrout devices and drivers](#)

[Configuring Brooktrout devices for use in Zetafax Server](#)



## Installing Brooktrout devices and Drivers

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Zetafax Server provides support for a variety of Brooktrout intelligent fax devices. Please select your device:

### TR1034 E1/T1, TR1034 BRI, Trufax BRI, Trufax Analog (Half length) and TR1034 Analog

#### Installing the Brooktrout device(s) hardware

**Note:** To prevent static damage, always connect yourself to ground using a ground strap before working with computers and computer components. Handle boards only by the edges or mounting brackets and Always transport and store them in an anti-static bag.

1. Shut down the server system and remove the cover, also if present remove the PCI expansion hold down bar.
2. Locate a vacant PCI slot, and remove the slot cover from the system chassis.
3. Align the board with the slot and seat the board firmly into the slot, and tighten the mounting screw into the system chassis.

**Note:** If you are adding an additional Brooktrout board, or installing multiple boards. You must make a note of **Module** numbers of the various boards. Each board must be set to a unique module number for that system. Please refer to the documentation provided by Brooktrout to do this.

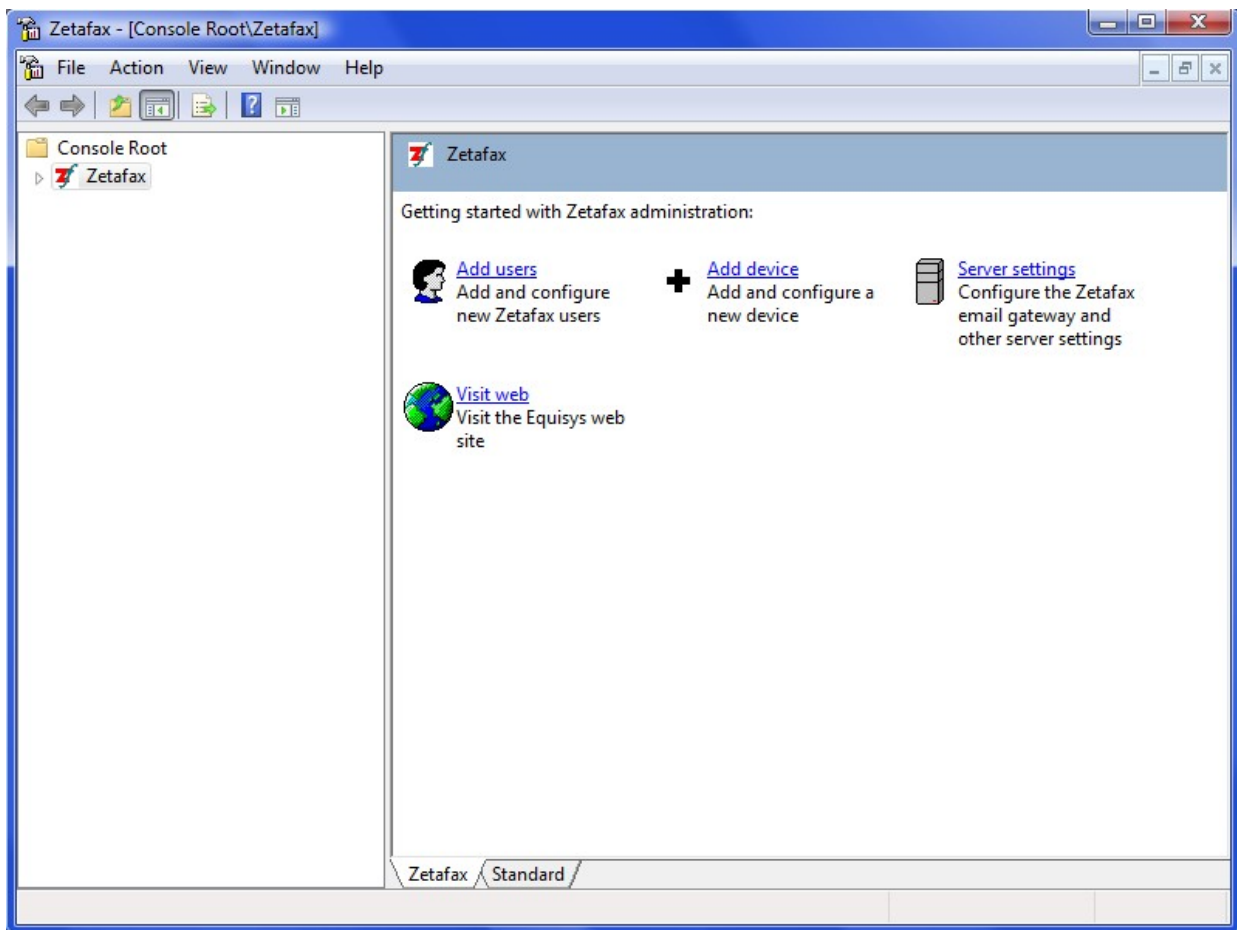
4. Replace the cover.

For more information about the hardware installation please visit the website: <http://www.dialogic.com>

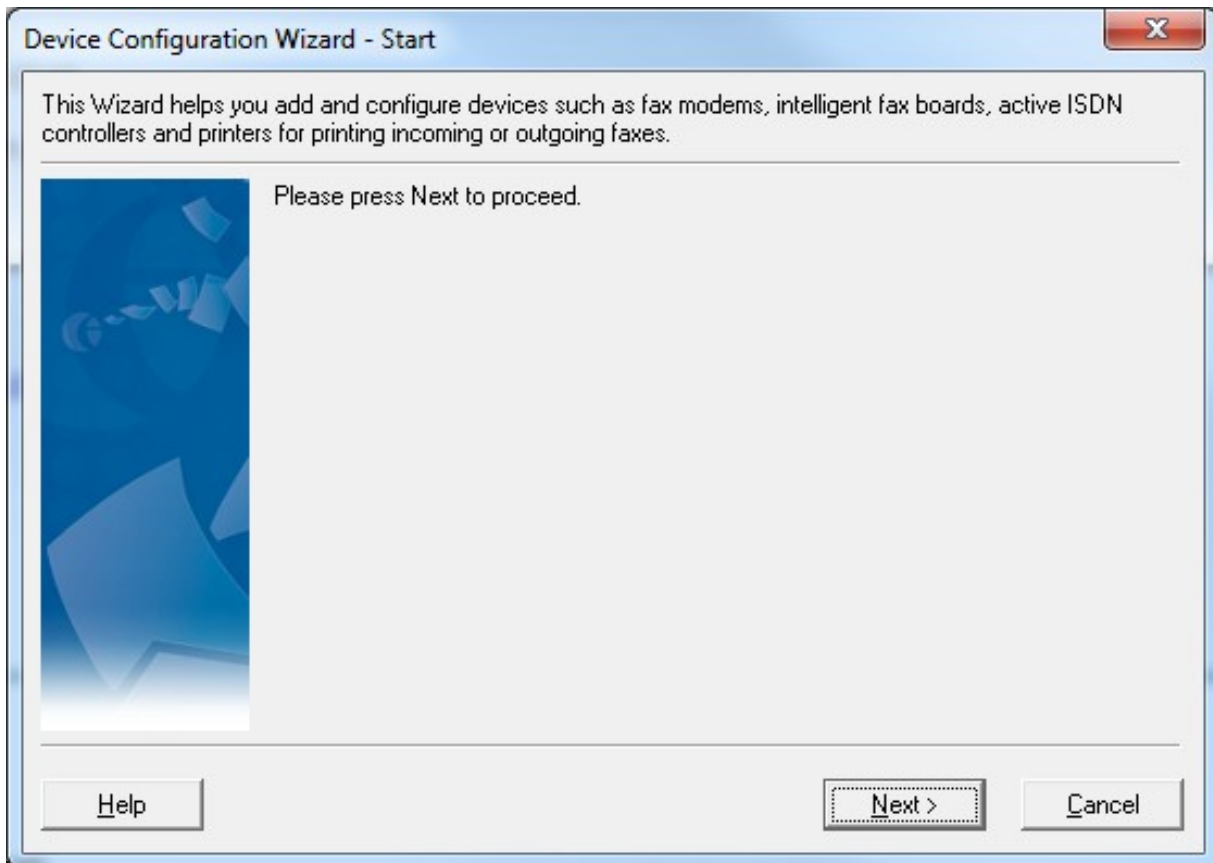
#### Installing the Brooktrout Drivers and application

To work through this next section you will need to have your Zetafax installation CD, or have downloaded the current Zetafax Server installation from the Equisys website [http://www.equisys.com/support/KnowledgeBase/software\\_update.html](http://www.equisys.com/support/KnowledgeBase/software_update.html).

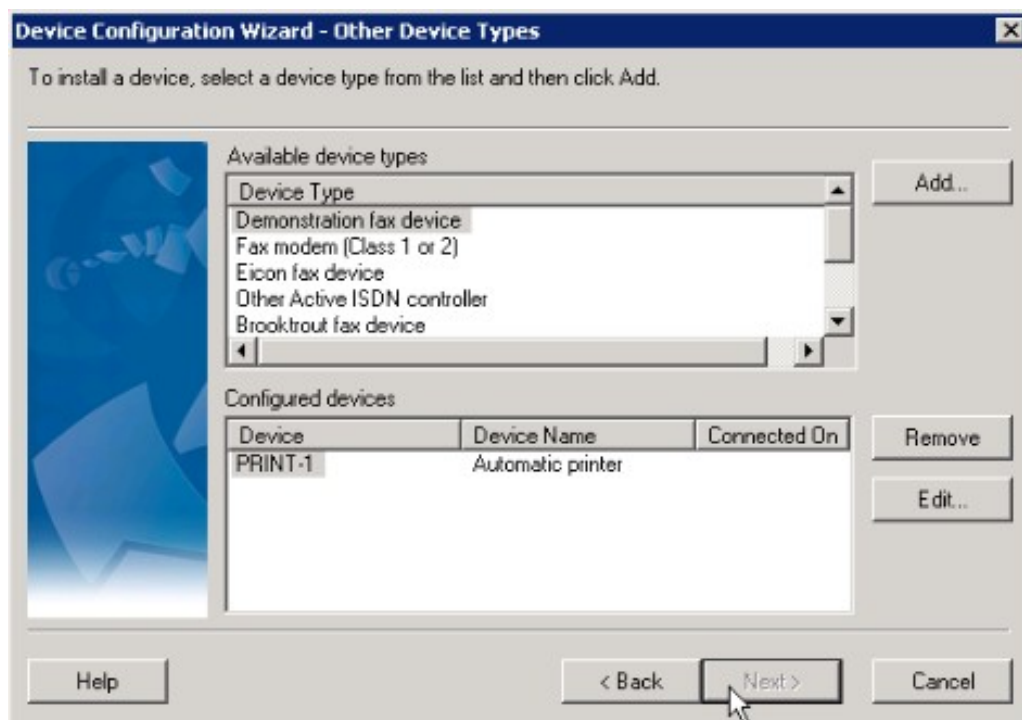
1. Start up the system, and logon to Windows as a user with administrator rights.
2. Open **Zetafax Configuration** from the start menu.
3. Select the **Add device** option and the Device Configuration Wizard will open.



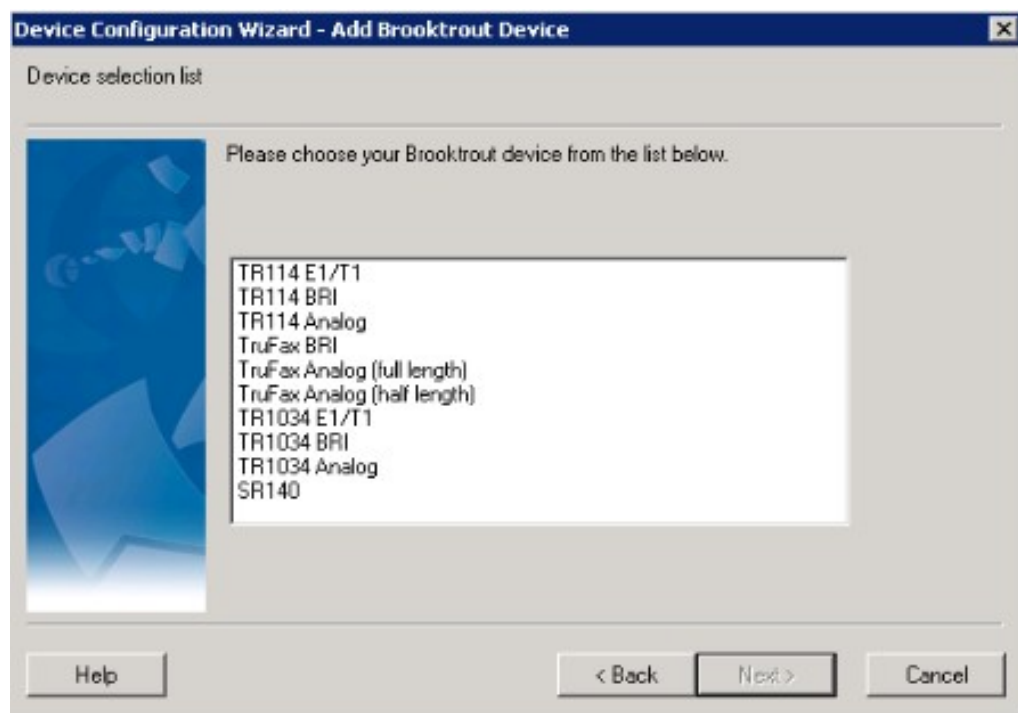
4. Click **Next** to start the Device Configuration Wizard.



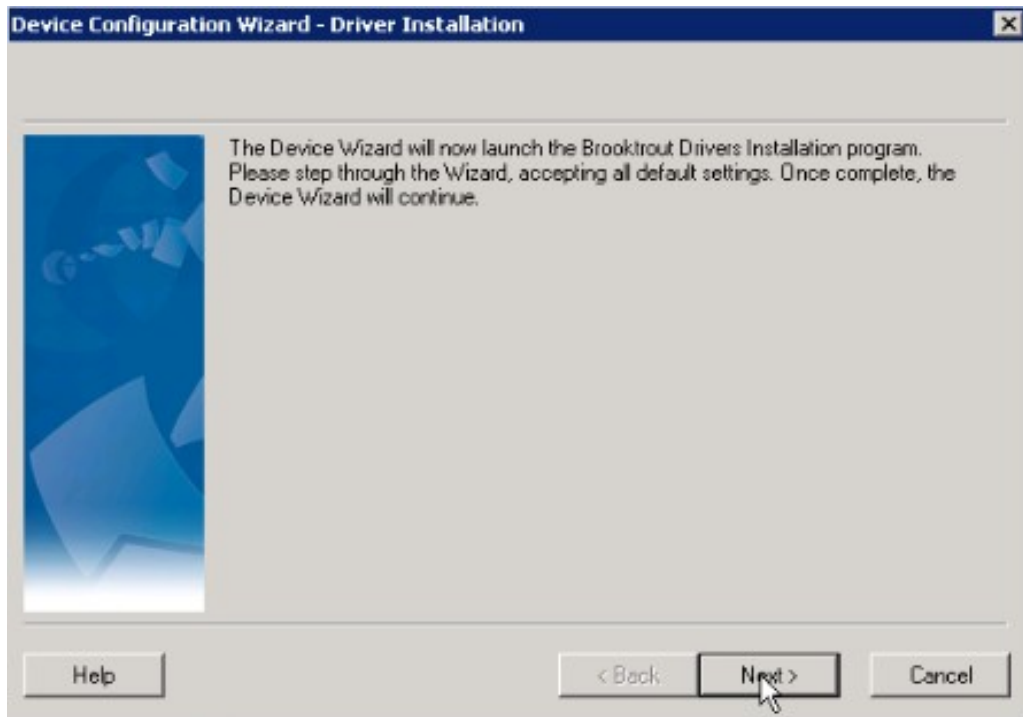
5. Select the Brooktrout Fax Device option from the list of device types.



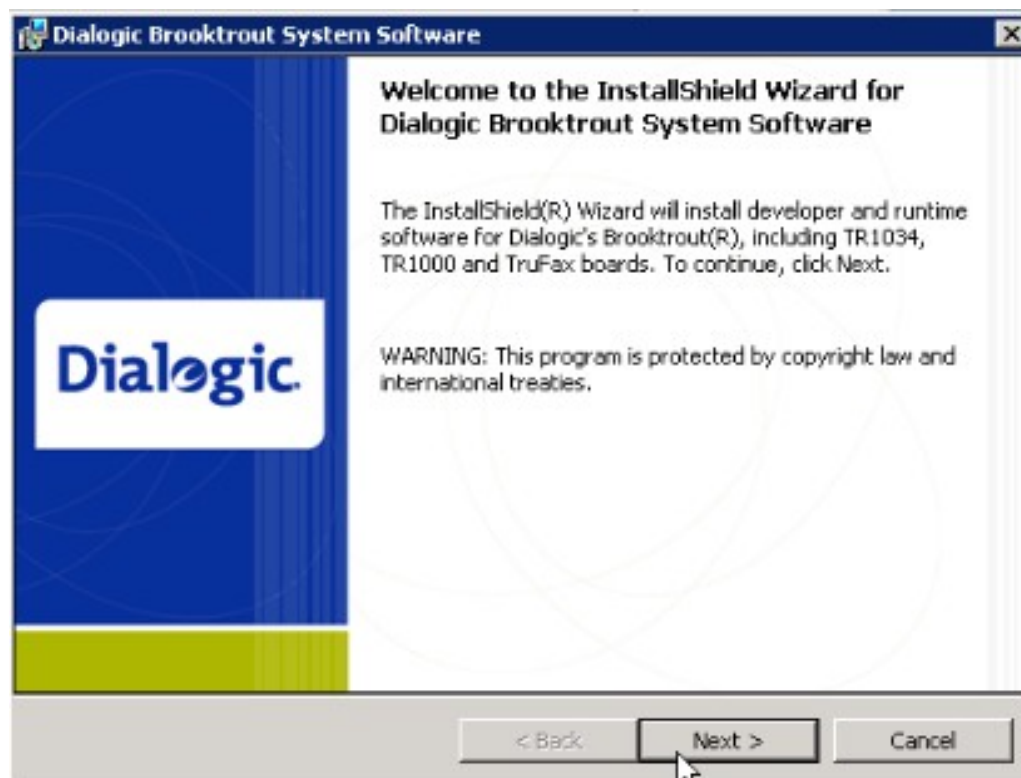
6. Select the Brooktrout Device you wish to install and select **Next**.



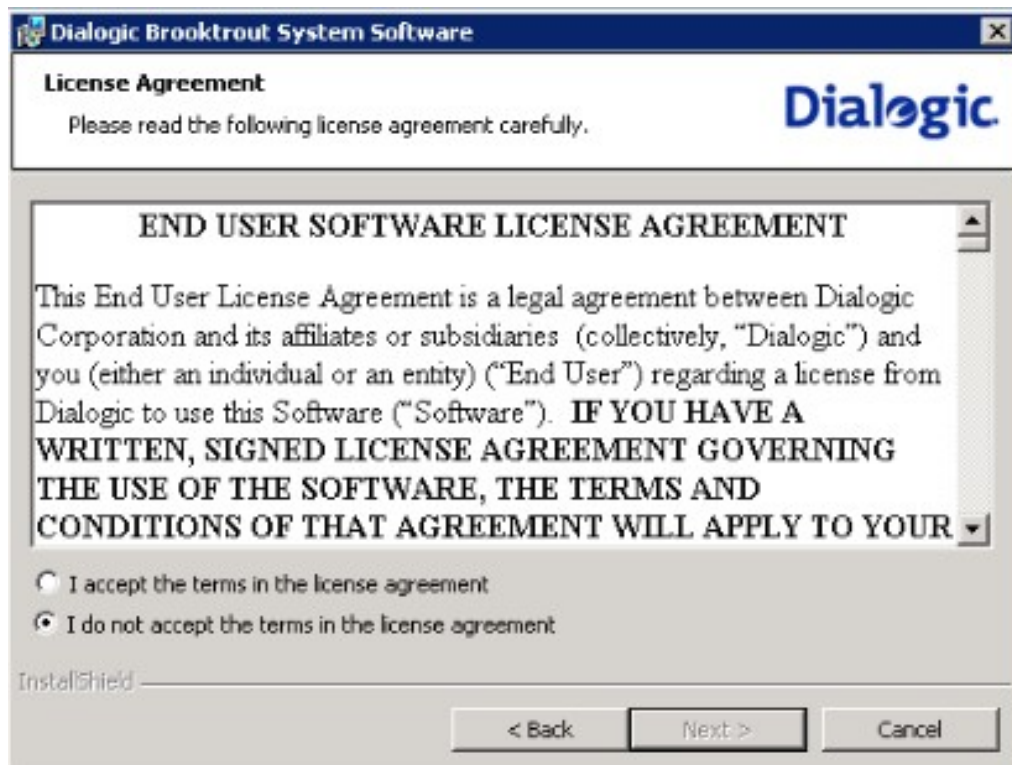
7. Select **Next** to launch the Brooktrout driver installer.



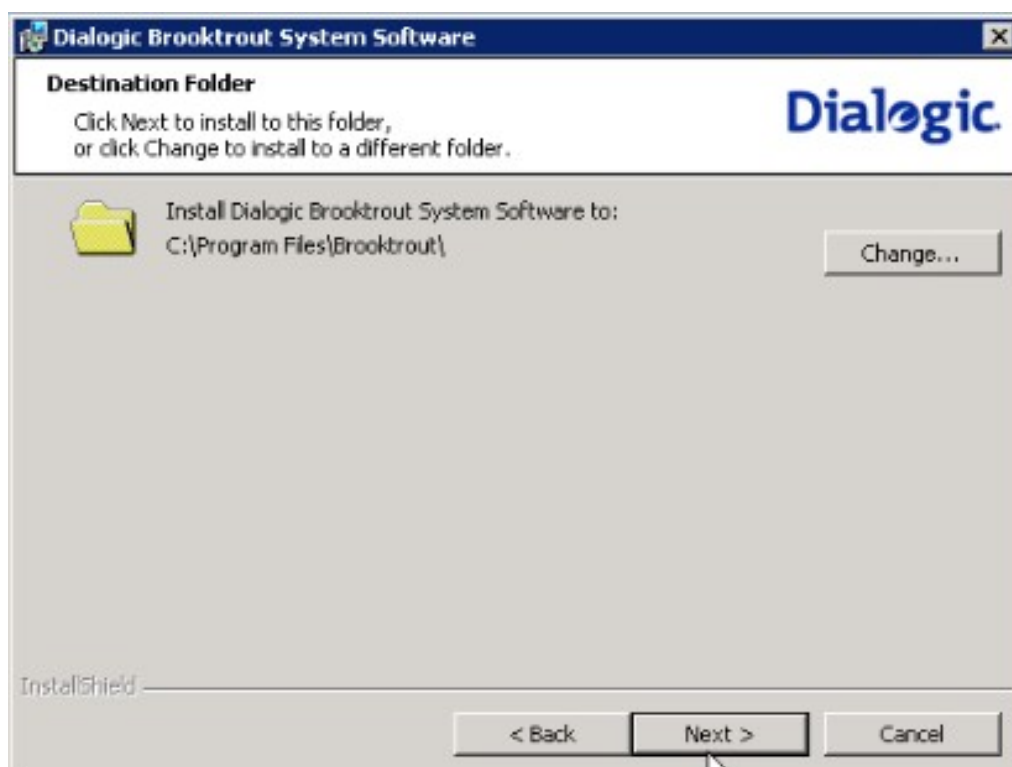
8. Select **Next** to start the install.



9. Review the license agreement and select **I accept the terms in the licence agreement**, and click on **Next**.



10. Click **Next** to confirm the destination folder, then click **Install**.

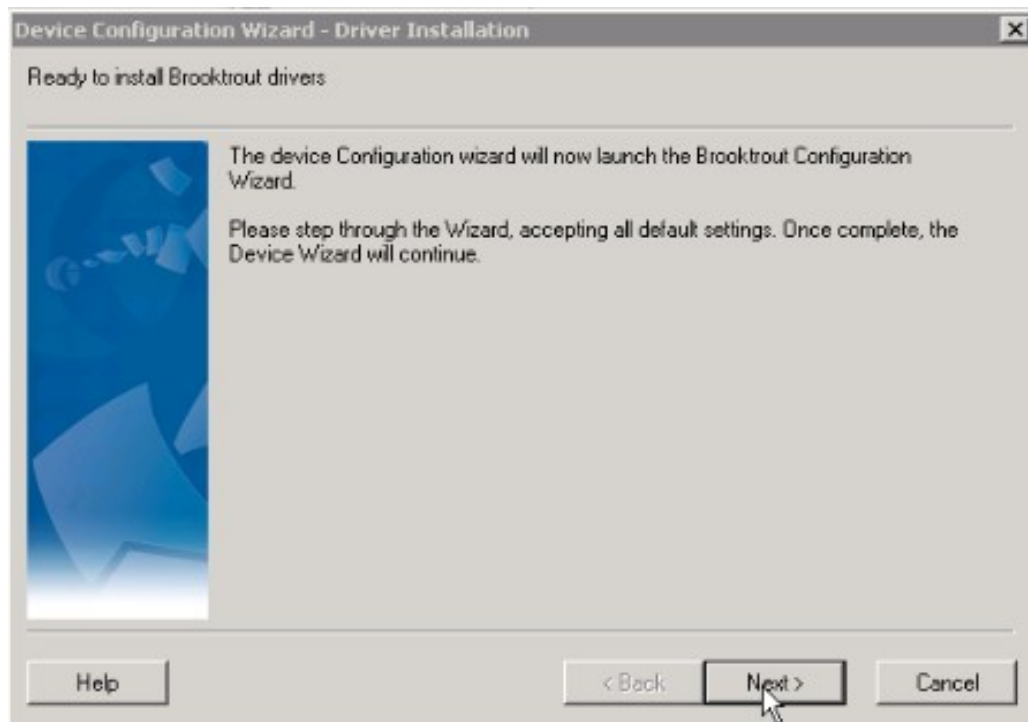




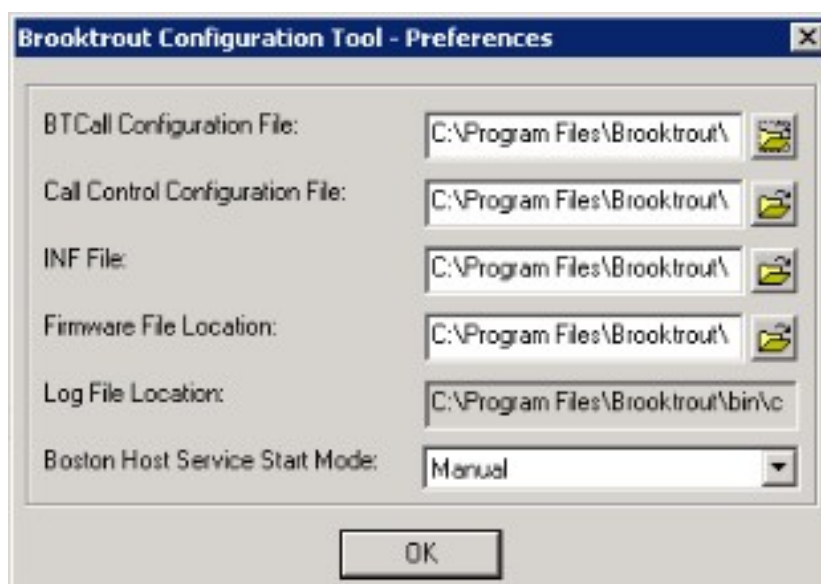
11. Select **Finish** to close the wizard. Now that you have completed the Brooktrout driver wizard we can continue with the device configuration.



12. On returning to the Device Configuration Wizard select **Next** to continue.



13. The **Brooktrout Configuration Tool - Preferences** will be displayed (if this is the first device you are adding). Accept the defaults and click **OK**.



14. The **Brooktrout Configuration Tool - Wizard Mode** will be displayed click **Next** to start the wizard.
15. The wizard will display the hardware and software information, as shown below, indicating the type of the device and name of the device. The Software Information section will indicate the driver version. Please make sure that the information in the following screen is in accordance with your

hardware before clicking **Next**.

**Brooktrout Configuration Tool - Wizard Mode**

**System Report**

**Software Information**

Name	Version	Build
Boston Btv API	5.4.1	14
Boston Driver	5.4.0	12

**Hardware Information**

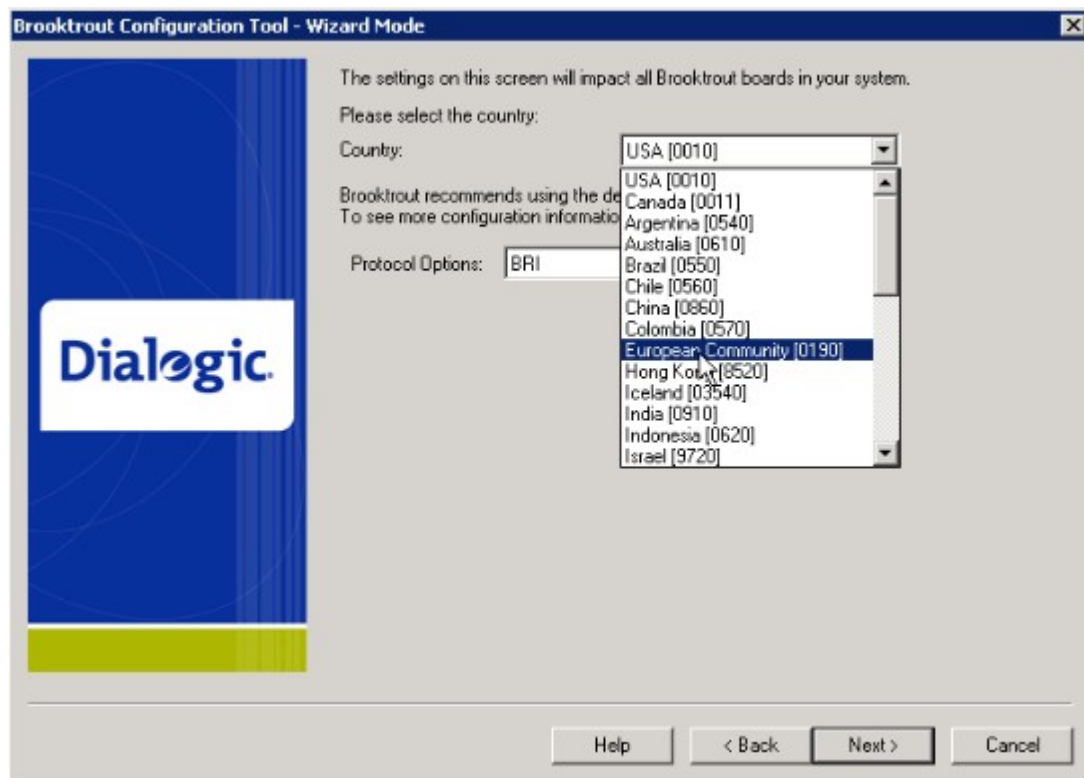
**Board Information - Module 0x2**

Name	Value
Board Name:	TruFax 200 BRI
Number of Ports:	1
Number of Voice Channels:	0
Number of Fax Channels:	2
Description:	2 channel Fax, BRI connection, Universal PCI

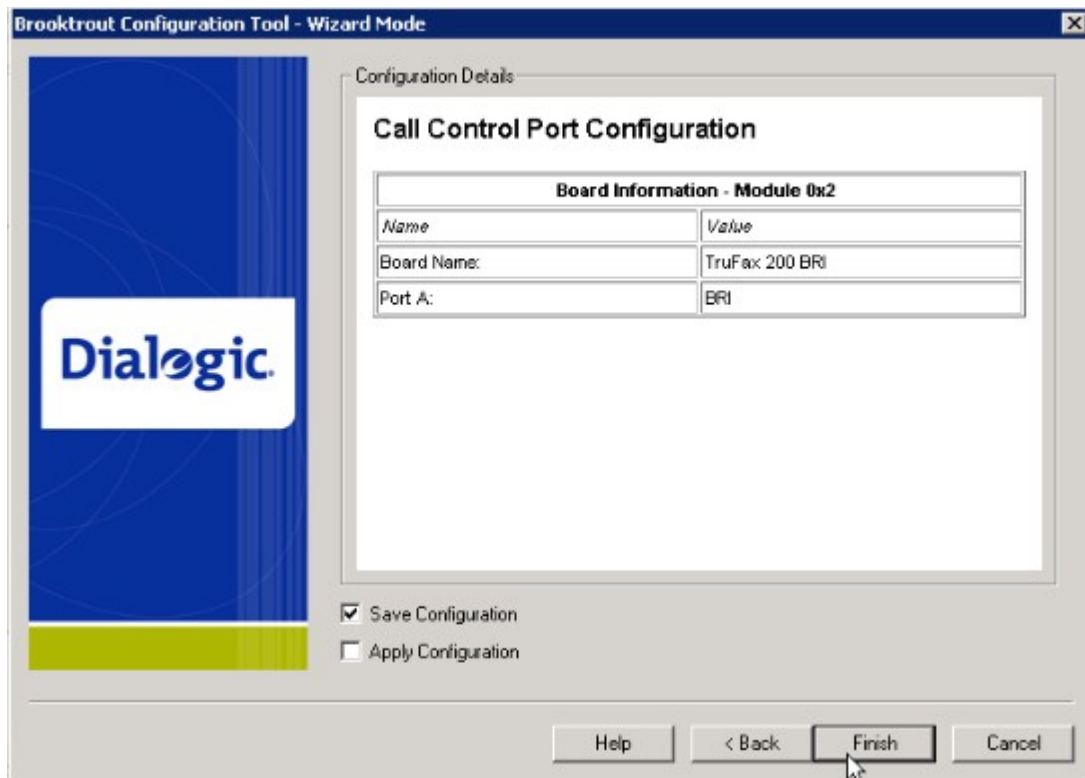
Buttons: Help, < Back, **Next >**, Cancel

16. Select the country that you are operating in from the list and click **Next**.

**Please Note:** Systems utilizing a low profile PRI board need to select an appropriate Protocol Option.



17. On the **Call Control Port Configuration** screen, select **Save Configuration** and **Apply Configuration** and click **Next**.



18. Click **Finish** to close the Brooktrout Configuration Tool.
19. Then select **Next** on the Device Configuration window to continue the install.
20. The Zetafax Device Configuration Wizard - Settings dialog box will be displayed.

Device Configuration Wizard - Settings

Please specify the required settings for this Brooktrout device and then click Next.

Device: BTB-G1

Description \*: TruFax BRI

Device Module \*: 2

Channels used: 0

Receiving

User to receive incoming faxes: (disabled)

Receive-only channels: 0

☐ Use all channels for incoming calls only

\* Denotes a field that must be completed.

Buttons: Help, < Back, Next >, Cancel

**Note:** Configuration for these types of device is on a per device basis, not on a per port basis as in previous versions of Zetafax, or other fax devices.

21. Enter a description for the device you are configuring.
22. If this is the only device you have installed, the configuration program, will have automatically selected the **device module number**, if you have multiple cards installed, you will need to make sure the correct module number has been selected for the card you are configuring.
23. In the **Channels used** field you need to specify the number of lines on the device you wish to utilize up to the total number available on the device (these may not be the same value if you have a partial PRI line or a limited line licence).
24. Next you need to select the default **User to receive incoming faxes** if you wish to receive faxes on this device. You can also choose to set a certain number of **Receive-only channels** or check the **Use all channels for incoming calls only** if you won't be sending faxes. If you wish to make all channels outgoing only, set the default user to receive faxes to **(disabled)**.

**Note:** If you are using DID/DDI routing, you will still need to select a default user for incoming faxes. This will be the user who receives faxes if no DID/DDI information is received.

25. When you have completed specifying the settings, click **Advanced...** to specify a dial prefix (e.g. 9 to get an outside line), the fax number on the header line etc. click **OK**, when you have finished.

**Note:** You may need to run the **Driver configuration tool...** in advanced mode if, for example, you have a digital card and need to check that the line type is set to either **ISDN** or **T1 Robbed-bit** as appropriate.

26. Click **Next**, then **Next** again to continue, and **Finish** to complete.
27. Continue through the installation as normal.
28. Start up the Zetafax Server, once initiated each channel you specified will show up as idle in the Zetafax Server.

29. Select the type of Brooktrout card you are installing (in this case any of the TR1034 devices or the Trufax BRI) and click **Next**.

### Related topics

[Configuring Brooktrout devices for use in Zetafax Server](#)

[Installing the Brooktrout SR140](#)



## Configuring a Brooktrout device

The Zetafax Configuration program allows you to configure the way in which Brooktrout devices interact with the Zetafax Server.

### Main Options

#### Device

The name that Zetafax Server will use to identify the device, e.g. BTB-G1. This name is automatically generated by the Configuration program.

#### Description

The device description. This is automatically populated with the device type you selected, but may be changed.

#### Device Module Number (TR1034, Trufax BRI and Trufax Analog (half length))

Refers to the number selected on the rotary dial on the device. Note that the list only contains valid module numbers, i.e. module numbers where a device exists.

#### Channels Used

The number of channels used on the Brooktrout device. For TR1034 and Trufax BRI, and Trufax Analog (half length) solutions, the upper limit of this control is set automatically. In each case, you should select the number of channels you want to use on this device. Channels are mapped automatically starting at the lowest channel number (channel 0).

#### User to receive incoming faxes

The Zetafax user who will receive incoming faxes for this device. By selecting **(disabled)** the device is configured for sending only. Please note that it **is** possible to configure a different receiving user for each channel on the Brooktrout card should you wish to do so. Please refer to the document setup.wri in the \SYSTEM\Z-DB\ folder for further details. Receive-only channels

The number of channels on the device reserved for receive-only calls. Normally, channels are reserved from the lowest channel number first. Please refer to the **ChannelsReserved** and **HighestFirst** settings in setup.wri in the \SYSTEM\Z-DB\ folder for further details.

#### Use all channels for incoming calls only

Reserves all channels on the device for incoming calls, effectively removing the ability to send.

### Advanced Options

The advanced options can be accessed by clicking on the 'Advanced' button.

#### Dial Prefix for External Calls

Allows you to specify a dial-prefix for your fax calls, e.g. enter 9 if you need to dial 9 for an outside line.

#### Fax number on header line

Enter the fax number that will appear in the header line on your fax.

#### Organization name on header line

Enter the organization name that will appear in the header line on your fax.

**Use DTMF tone dialling**

For digital devices, this option is enabled and greyed out.

**Detect busy/engaged tone**

Tells the Brooktrout device whether it should detect an engaged tone

**Detect dial tone**

Tells the Brooktrout device whether it should detect (wait for) a dial tone.

**Maximum Baud Rates**

Specifies the maximum send and receive baud (transmission/reception) rates for the Brooktrout device. If left at the default settings, the rates will be set to the fastest that the device is capable of.

**Related topics**

[Installing the Brooktrout devices and drivers](#)

[Configuring Brooktrout devices for use in Zetafax Server.](#)





## Scanner Integration

Using Zetafax can save time faxing documents direct from your desktop. It is possible to configure your scanner to automatically send scanned items to Zetafax for sending, this section will detail how to configure your scanner to operate effectively with Zetafax.

### Configuring your Scanner to work directly with Zetafax

It is possible to adjust your computers response to the pressing of a button on your scanner for example pressing the scan button. By adjusting the button events it is possible to enable the scanner to open Zetafax by default upon scanning an item, alternatively you can set the scanner to prompt the user for the program they wish to use to process the scanned item.

To adjust the settings of a scanner already installed on the computer please follow the steps below, if the scanner has yet to be installed on the machine please follow the manufacturer's instructions before referring to the instructions set out below.

- Open the **Start Menu** and select the **Control Panel**
- Select the **Scanners and Cameras** option
- Select the scanner you wish to setup from the list of available devices and select **Properties**
- In the **Properties** window select the **Events** Tab
- From the **Select an event** drop down box choose the event you wish to configure Zetafax to work with, such as on pressing the scan button or any of the other programmable buttons
- From the Actions section select one of the options below
  - **Start this Program:** If you wish Zetafax to open upon the event specified, e.g. pressing the scan button, select Zetafax from this list. (note: you will need to have opened the Zetafax Client at least once prior to this for the Zetafax option to be represented in this list.)
  - **Prompt for which program to run:** This allows the user to specify the program to run from a list upon the events occurrence
  - **Take no action:**
- Select the **OK** button to make your changes

### Using a Scanner with Zetafax

If you have set the scanner event to run Zetafax then upon a selected event, e.g. pressing the scan button, Zetafax will open, if Zetafax is already open and button is pressed the scanning options will be displayed. Once scanned the document will be passed to the Zetafax fax wizard where it can be processed as normal.



## Using Zetafax with HP Digital Sender Devices

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Using Zetafax can save time faxing documents direct from your desktop. There is no need to print a fax to a network printer, and feed it through a manual fax machine. However most people still need to fax paper based documents. This is exactly what the Hewlett Packard Digital Sender devices are designed to do. They connect directly to a network Zetafax Server and allow faxes to be submitted directly from the scanner, entering the required fax number on the scanner's control panel.

They provide the following advantages over stand-alone fax machines for sending paper documents:

- The Zetafax Server will dial and redial automatically.
- They scan documents immediately at 15 pages per minute and store the faxes at the Zetafax Server during sending, instead of waiting for each page to be received in turn.

HP Digital Sender devices allow you to log on by specifying your network username before you use it. This is used to determine the matching Zetafax account to use when sending the fax, and the Zetafax Server reports the status of faxes in the Zetafax Server queue at the user's desktop.

You can also choose whether guest users who do not have a Zetafax account are to be allowed to submit faxes, and the Zetafax account that will be used for them.

These topics give information about how to configure the Hewlett Packard Digital Sender devices and Zetafax to work together. They also give instructions about how to submit faxes using the device, to summarize and supplement the Hewlett Packard documentation.

### **Related topics**

[Installing HP Digital Sender devices](#)

[Configuration for HP Digital Sender devices](#)

[Setting up a guest account for HP Digital Sender devices](#)

[Sending faxes with HP Digital Sender devices](#)



## Installing HP Digital Sender Devices

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### Requirements

This setup requires a HP Digital Sender device and a Zetafax Server.

### Installing the Digital Sender Service

When you install the Digital Sender Service, which is part of the install process for the HP JetAdmin utility program, the Setup program prompts you whether you wish to add fax service functionality.

- Click **Yes** and select the **Zetafax** check box.
- Set the work area path to the directory `zfax \HPFSCAN` where `zfax` is the Zetafax Server's base directory.

**Note:** You must specify a mapped drive such as `F:\ZFAX` as the Setup program will not recognize UNC pathnames.

This is the directory where submitted faxes will be placed for processing by the Zetafax Server. In the current release of the HP software this directory must be named HPFSCAN.

### Related topics

[Using Zetafax with HP Digital Sender Devices](#)

[Installing HP Digital Sender devices](#)

[Configuration for HP Digital Sender devices](#)

[Setting up a guest account for HP Digital Sender devices](#)

[Sending faxes with HP Digital Sender devices](#)



## Configuration for HP Digital Sender Devices

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### Configuring the scanner

The following steps are all taken on the computer that runs the service tasks for the scanner where the JetAdmin utility is installed. This may be on a different machine to the Zetafax Server computer.

- Start up the HP JetAdmin utility program.
- Select **All devices** in the left-hand window, and in the right-hand window find the scanner that you want to configure.
- Right-click on the scanner to display the **Modify** dialog.
- Click **Next** until you get to the **LAN Fax Server** dialog.
- Select **Zetafax** from the list.

The Fax dialog will configure all of the necessary settings for the Zetafax Server.

Before leaving this dialog:

- Ensure that the **Enable fax** option is checked, then click **Next** .

### Configuring the Zetafax Server programs

#### To configure the Zetafax Server for use of the HP Digital sender

- Launch the **Zetafax Configuration** program (**Start** menu, **Programs** submenu, **Zetafax** submenu).
- In the right pane, click **Server Settings** .
- In the right pane, double-click **HPSCAN direct scan-to-fax program** .

The Zetafax HPSCAN direct scan-to-fax program configuration dialog will appear.

- Ensure that the **Enable HP network scanner support** check box is checked.
- In the **Directory for files** box, enter *zfax*/HPSCAN where *zfax* is the path of the Zetafax Server directory.
- This entry must match the work area path set in the [Installing HP Digital Sender devices](#) procedure, so if you used a alternative patch during that procedure, set the **Directory for files** to that path instead.
- Make any other changes you require to the settings, using the **Help** button to discover details if required. Click **OK** . Exit the **Zetafax Configuration** program.

#### Related topics

[Using Zetafax with HP Digital Sender Devices](#)

[Installing HP Digital Sender devices](#)

[Configuration for HP Digital Sender devices](#)

[Setting up a guest account for HP Digital Sender devices](#)

[Sending faxes with HP Digital Sender devices](#)



## Setting up a guest account for the HP Digital Sender Devices

You may allow fax sending by users who have not identified themselves and to the scanner and do not have a Zetafax account by creating a guest account and configuring the scanner to accept it.

### To configure a guest account

- Follow the instructions in the topics within [Zetafax user details](#). The **Full name** of the guest account will appear on the fax header line, so you set it to, for example, *Fax Server*.

### To configure the scanner to accept the guest account

- In the HPSCAN direct scan-to-fax program configuration dialog above, under **Zetafax user accounts**, set **Guest account** to the guest account you have created.

If you want to allow people who have not identified themselves on the scanner, or who do not have a Zetafax account, to submit faxes from the scanner:

- Create a Zetafax user account for these guest users using the **Zetafax Configuration** program.

The **Full name** will appear on the header line, so should be set to something generic, such as Fax Server.

- Run the **Zetafax Configuration** program and select the **Change Server Settings** option.
- Select the **HP scanner** icon in the **Category** list to display the **Scanner Setup** dialog.
- Configure the scanner options, using the on-line help for further explanation if required.

If you decided to allow guest users then enter the Zetafax account name you created, otherwise leave the guest account set to **none**. The directory specified in the **Directory for files** field should be the one which was specified in the JetAdmin program above; if this is on a network drive then ensure it is specified using UNC drives rather than mapped drives; for example \\SERVER\APPS\HPFSCAN rather than J:\HPFSCAN.

- Ensure that **Enable HP network scanner support** is checked.
- Click **OK** and exit the Setup program.

### Related topics

[Using Zetafax with HP Digital Sender Devices](#)

[Installing HP Digital Sender devices](#)

[Configuration for HP Digital Sender devices](#)

[Setting up a guest account for HP Digital Sender devices](#)

[Sending faxes with HP Digital Sender devices](#)



## Sending faxes with HP Digital Sender Devices

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### Checking the Zetafax Server programs

Once you have completed the [installation](#) and [configuration](#) procedures, you can start the Zetafax Server. We recommend that you first run it as an application from Windows Explorer, rather than as a service, to check the installation.

As the server loads modules it logs messages to the server log and the main server window indicating the name of the programs it is loading. One of these programs will be called HPSCAN. If HPSCAN does not appear, check that the instructions in [Configuring the Zetafax Server programs](#) have been followed.

### Sending from a specified user account

To begin, the screen on the scanner should present a "FAX" option. If not, press the RED button to reset it.

- Click the button on the display nearest the FAX option.

The scanner will then prompt you for a fax number and a user to notify.

- If you have pre-configured any fax recipients using the JetAdmin utility you can specify them in the **FAX** field. Otherwise use the numeric keypad to type in a fax number and press the **Enter** key.

You can repeat this to send the same thing to several people.

- In the **NOTIFY** field, type your network username and press **Enter**.

Put your document on the feeder, including a cover sheet if you want one, and press the GREEN button.

**Warning:** The list of numbers you enter is erased only when you return to the scanner's login screen. If you want to send a second fax to a different number you must either log out first by pressing the RED button, or use the **left arrow** key to deselect the previous numbers.

The fax is then submitted to the Zetafax Server for sending. Zetafax will look at the network names for each user to determine which account to use; if no match is found it will use the guest account specified in the Zetafax Server configuration program, or reject the fax if no guest account was specified.

After a few seconds you should see a message on the Zetafax Server showing progress as it queues the message for the selected user. If you look at the Zetafax Client for that user you will see a new entry for the message, and you will be able to track its progress as for any other fax.

When the message completes, Zetafax notifies the HP scanner software of the result. This can then be viewed in the transaction log on the HP Digital Sender device utility program.

If the fax failed, it remains in the Zetafax **Out** window for that user; this should be checked and tidied periodically as normal.

If the fax is successful, it will be deleted automatically if the **Delete successful messages** option was selected in the Zetafax Server configuration program.

### Sending using the guest account

Unless the HP Digital Sender Device has been configured to require every user to specify their username, you can send directly from the scanner without having to log in first (rather like on a standard fax machine). There is no need to enter a network username in the **NOTIFY** field. Enter the fax number as before and press the GREEN button.

This requires that a [guest Zetafax account](#) has been previously created.

### Message options

Faxes submitted using the HP Digital Sender Device are sent with no additional cover sheet or letterhead,

which means that as for a standard fax machine you must include a cover sheet with the document if required. Otherwise all message options, including the sender name on the fax header line, are the defaults for the Zetafax user account which is used.

**Related topics**[Using Zetafax with HP Digital Sender Devices](#)[Installing HP Digital Sender devices](#)[Configuration for HP Digital Sender devices](#)[Setting up a guest account for HP Digital Sender devices](#)[Sending faxes with HP Digital Sender devices](#)



## Hardware requirements

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Zetafax supports most active ISDN controller cards supporting CAPI (with fax support). The following sections give details of other possible hardware configurations.

### BRI fax boards and Active ISDN Controllers

The most common way of installing DID is to use a basic rate ISDN (BRI) Brooktrout intelligent fax board. These boards connect directly to a BRI line and interpret the DDI or MSN information. In some countries, BRI is often called ISDN-2 as it is supplied with two channels (or telephone lines).

### PRI fax boards

For companies who want to implement DID on a larger scale, it is possible to install a higher density fax board capable of supporting many more fax lines by using a Primary rate interface (PRI) fax board. PRI is an ISDN service which supports up to 30 channels and which supports DDI routing. In addition, both PRI and BRI can provide features not available over traditional analog telephone lines such as 'advice of charge'.

### DID fax board

In North America and some other countries DID information can be delivered by the phone company over a special DID analogue telephone line used for incoming calls only. There are models of Brooktrout and Gammafax intelligent fax boards for connecting directly to DID lines to interpret the DID information.

### PBX with DDI/DID

If your phone system (PBX) already supports Direct Dialing Inwards (DDI or DID), you can add DDI/DID routing for fax very simply. The PBX needs to be configured so that calls to any of the fax DDI/DID numbers you allocate are routed to the phone extensions used by the Zetafax Server.

**Note:** The number of DDI/DID fax numbers is independent of the number of fax modems and lines in use. On Zetafax Servers using more than one fax modem the extensions would need to be configured so that if one was engaged the PBX moved on to the next (sometimes called *divert on busy* or *hunt groups*).

When Zetafax answers the call the PBX also must be configured to identify the extension (DDI/DID) number being dialed, by sending a series of DTMF tones. This is the method used for connecting to voicemail systems, and is supported by most PBXs which support DDI/DID.

Call Equisys or your local supplier if you want specific advice about the configuration required.

### Fax modem

The fax modems or intelligent fax boards used for DID routing, using either of the two options above, must support DTMF tone recognition in fax mode. All Brooktrout and Gammafax intelligent fax boards do support DTMF tone recognition. Check with Equisys for a full list of supported modems with this feature.

### ISDN router

ISDN (Integrated Services Digital Network) comes to the rescue of people who do not have a PBX which handles direct dialing, or who want to keep fax separate. By installing an ISDN line with a fax router box, you can allocate a series of DDI numbers without using the PBX.

The fax router box sits between the ISDN line and the fax modem or fax board. When an incoming call is answered, it identifies the DDI number dialed by sending DTMF tones before connecting the call.

Many telephone companies offer an alternative to DDI on ISDN lines called Multiple Subscriber Numbering (MSN). It is suitable where only ten or fewer separate numbers are required. Fax routers can usually handle both MSN and DDI.





## Modem Troubleshooting

This help file is designed to address some of the most common problems people face when using a modem:

### My modem is not hanging up after making a call.

Edit the following file using NOTEPAD: zfax\SYSTEM\Z-DB\SETUP.INI

- Scroll down the file until you find the FCLASS paragraph for your modem, e.g. [FCLASS-1].
- Locate the line following line:  
CheckInit1:

- Modify this line so that it looks like this:  
CheckInit1: ATH

**NOTE:** that there should be a space after the colon ': '.

### Zetafax is reporting the error 'No suitable device for addressee' when I try sending a fax.

This means that Zetafax is not able to locate a device that can be used for sending. If you have not configured a modem for use with Zetafax you should do so. If you have setup a modem using the Zetafax configuration program the above message will be reported if the modem has been configured for receive only. To allow sending from a device that has been setup within Zetafax perform the following tasks:

- Run the Zetafax configuration program
- Select the option 'Configure devices'
- Select your modem and click on the EDIT button
- Deselect the option 'Use for incoming calls only'
- Click on OK then choose QUIT from the configuration menu
- Restart the Zetafax Server

### Sending to or receiving from certain people always seems to fail. Why?

If you are experiencing difficulties with sending / receiving check if this is happening with all devices sent to or receiving from.

If you can successfully send to other devices it is most likely that there is an incompatibility between your fax modem and the other fax device.

Try the following:

- Check on the Equisys web site ([www.equisys.com](http://www.equisys.com)) that you have the latest version of the Zetafax FCLASS driver
- If using Zetafax 6 or later, use the Zetafax configuration program to change the modem settings to enable Class 1 operation this helps with many compatibility issues
- Check with the modem manufacturer that you have the latest version of the modem firmware.

### I have got an internal fax modem, how do I know which fax classes it supports.

Use HyperTerminal in the Accessories | Communications program group. When prompted for a connection name type in test' and click OK. You will then be asked which modem to connect with, choose COM'n', where n' is the com port number used by your modem. Click OK twice.

Type the following in the terminal window:

AT+FCLASS=?

The modem reply will give the class supported, and will be of the form:

0,1,2,2.0

Where 0 is for data, 1 is Class 1 fax, 2 is Class 2 fax and 2.0 is Class 2.0 fax. A reply of ERROR confirms that the modem does not support fax.

**I have tried everything what else can I attempt.**

- Check the phone line is OK by plugging in a normal phone (Analogue). Try dialling the telephone number for that line to check that the line works correctly (is the telephone cable OK? Make sure you are using the phone cable provided by the modem manufacturer).
- If you have another fax modem, try configuring that for use with Zetafax.
- If characters are being dropped or erroneous data received on receiving faxes, try reducing the ReceiveSpeed setting for your modem. This can be done by running the Zetafax Configuration program. From the main menu of the configuration program select 'Configure devices'. Edit your modem settings and click on the 'More' button.
- If you are using an intelligent serial card and/or special COM port drivers, remove them from the system.
- Try attaching the modem to a different PC on the network, and running the fax server from that PC.

**References**

For additional information on Modem issues, please refer to our website: [www.equisys.com](http://www.equisys.com)



## Email Gateway

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The Zetafax Email Gateway allows email users to address and send a message to a fax recipient as if they were sending an email. The Email Gateway can also deliver received faxes as email messages with graphics attachments.

The Email Gateway is installed as a standard component with the Zetafax Server. In order to start using the Email Gateway you will need to install additional software (depending on your email system) and then configure the Email Gateway to work with the email system. The following topics provide information on how to do this.

### Supported Email systems

The Zetafax Email Gateway supports the following email systems:

- Microsoft Exchange 2010
- Microsoft Exchange 2007
- Microsoft Exchange 2003
- Lotus Notes 5 to 8
- SMTP mail systems

### Related topics

[How the Email Gateway works](#)

[Zetafax Email Gateway for Microsoft Exchange](#)

[Zetafax Email Gateway for Lotus Notes](#)

[Zetafax Email Gateway for SMTP](#)

[Setting up Email Gateway users](#)

[Email Gateway settings](#)



## How the Email Gateway works

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### **Sending Faxes**

The Email Gateway converts email messages into a fax format before submitting them to the Zetafax Server's main queue. The body text of the email message is converted and sent as coversheet text in the fax message.

### **Attachment files**

Any file attachments sent through the Email Gateway, such as word processor or spreadsheet documents, are converted by the Email Gateway to fax format. Files from the following application programs, generally the English language version only, are currently supported:

- Microsoft Word 2002, 2003 and 2007
- Microsoft Excel spreadsheets 2002, 2003 and 2007
- Microsoft Excel charts 97, Microsoft PowerPoint 2002, 2003 and 2007
- Corel WordPerfect 6.0, 6.1, 2002
- Microsoft WordPad
- Adobe Acrobat 3.0, 4.0 and 5.0, 6.0, 7.0

If the Document Conversion add-on is installed then the Email Gateway can handle over 225 different file formats.

### **Notification**

When you send a fax via a manual fax machine or fax software from a PC, you are instantly notified whether the fax was transmitted successfully or not. Similarly, when you send a fax through the email gateway, it will return via email confirmation of successful transmission. If required, on successful transmission, the gateway can also forward a copy of the faxed document as it was sent. If the transmission failed, an explanation of why is included in the returned email message.

### **Receiving Faxes**

The Email Gateway can be configured so that received faxes are forwarded to a user's email Inbox. The fax is delivered as a message with a graphics attachment. The Exchange Connector comes with special Outlook forms that allow received faxes to be viewed.

### **Related topics**

[Zetafax Email Gateway for Microsoft Exchange](#)

[Zetafax Email Gateway for Lotus Notes](#)

[Zetafax Email Gateway for SMTP](#)

[Setting up Email Gateway users](#)

[Email Gateway settings](#)



## Zetafax Email Gateway for Microsoft Exchange

This section gives an overview of using the Zetafax Email Gateway with Microsoft Exchange, and step-by-step instructions for configuring the Zetafax Email Gateway for Microsoft Exchange 2007 and 2003. It assumes that a Zetafax Server has been installed and is running on your network.

For Exchange 2007, the installation process requires configuration of both the Zetafax Server using **Zetafax Configuration** and setup of the Microsoft Exchange 2007 Hub Transport server.

Exchange 2003 installation requires configuration of both the Zetafax Server using **Zetafax Configuration** and the Microsoft Exchange 2003 server using the Exchange System manager. We recommend that the person who installs the gateway for Microsoft Exchange is familiar with these programs.

### Introduction

Under Microsoft Exchange, gateways to external email systems are called connectors. There are two major components to the Zetafax Email Gateway when using it with a Microsoft Exchange server: the Zetafax Connector and the email submitter.

#### Zetafax Connector

A connector is installed on the Microsoft Exchange server PC, and is used to route messages between Microsoft Exchange Server routing groups/sites and other messaging systems. For example, the Internet Mail Connector enables Microsoft Exchange users to exchange messages with other users on the Internet. Similarly, the Zetafax Connector routes email messages addressed to a fax recipient to the Zetafax Server. When you install the Zetafax Connector it runs as a service like other Microsoft Exchange connectors.

For Exchange 2007, the connector exists as an Active Directory object. For example, the Exchange SMTP Send Connector is used to route messages between Exchange Hub Transport servers or external systems. The Zetafax Connector routes fax messages to a designated Exchange Hub Transport server, which is then redirected to a drop directory within that server. There is no physical Connector process associated with Exchange 2007 Connectors, the Zetafax Connector object can be seen from ADSI Edit and configured via Powershell commandlets.

#### Email submitter

The submitter program STM32.EXE is an additional Zetafax Server module that runs on the Zetafax Server machine alongside the other Zetafax Server modules such as the Queue Manager, QM.EXE, and the Address Book Manager, ADB.EXE. Its function is to monitor both outgoing messages from the Connector, which it submits to the Zetafax Server's queue, and incoming fax messages which are passed to the Zetafax Connector on the Microsoft Exchange server.

In Exchange 2007, the submitter program takes responsibility for monitoring and processing faxes and communicates with the Exchange server by sending/retrieving files via the drop and pickup directories situated on the Exchange server.

#### Separate Zetafax Server

The Zetafax Server can either be run on the same computer as the Microsoft Exchange server or on a separate PC elsewhere on the network.

The Zetafax Connector for Exchange 2003 **must** be installed on a Microsoft Exchange Server computer. Additionally, the Zetafax Connector for Exchange 2007 can be configured manually on any machine in the domain with a user account that has the appropriate Active Directory permissions enabled. However, it is recommended that the Zetafax Connector for Exchange 2007 be setup on the Hub Transport server to be used.

#### Overview

To install the Zetafax Connector for Microsoft Exchange, you will need to follow the steps below, which are described in further detail in [Installing the Zetafax Connector for Microsoft Exchange 2007](#) and [Installing the Zetafax Connector for Microsoft Exchange 2003](#).

- Install a Zetafax Server and a Microsoft Exchange server on your network if you have not already done so.
- Run the Setup program to install the Zetafax Connector on your selected Microsoft Exchange server computer.
- Using the **Services** control panel, check that the installation program has started the Zetafax Connector service (Exchange 2003 only).
- Set up the Email Gateway using **Zetafax Configuration** , register the email system, and test the connection to the Microsoft Exchange server.
- Install the Email Gateway's printer driver and any rendering applications.
- Configure Zetafax users to use the Email Gateway.
- Install the Zetafax forms to the Microsoft Exchange server's Organizational forms library (Exchange 2003 only).
- Install the Zetafax Outlook Extensions on each client machine that will be using the Email Gateway.

**Related topics**[Installing the Zetafax Connector for Microsoft Exchange 2007](#)[Installing the Zetafax Connector for Microsoft Exchange 2003](#)[Microsoft Exchange Setup Service](#)[Email Gateway settings](#)



## Installing the Zetafax Connector for Microsoft Exchange 2010

If you wish to enable extended functionality for user settings in an Exchange 2010 environment, before the Zetafax Connector is installed run the Zetafax Exchange Connector - Schema Utility, this can be found on your install CD. This helps you to prepare your active directory.

Also ensure that you are logged into the Microsoft Exchange 2010 server PC using the administrator account or an account with administrator privileges that is also a member of the Schema Admin's group.

If you have a previous version of the Zetafax connector on the Exchange 2010 server PC, you must uninstall it before installing the Zetafax connector for Exchange 2010. The Zetafax connector can be uninstalled using the **Add/Remove programs** control panel. You will need to reboot exchange to completely remove the connector.

In addition to the automatic install process for the Exchange 2010 Zetafax Connector, there is also a manual process to install the Zetafax Exchange Connector. Please see the technote on the [Equisys website](#) for more information.



## Enabling the Email Gateway for Microsoft Exchange 2010

This section gives instructions for configuring the Email Gateway for Microsoft Exchange 2010.

Before you can configure the Zetafax Email Gateway for Microsoft Exchange 2010, the Zetafax Connector must have been successfully installed on the Microsoft Exchange 2010 server PC.

### Configuration

The Email Gateway is configured using **Zetafax Configuration**.

- Choose the **Server settings** option from the left pane and click the **Email Gateway** icon.

The default setting is for the Email Gateway to be disabled.

- Select the **Enabled** radio button to enable the Email Gateway.

Whenever you switch between **Enabled** and **Disabled**, all email addresses held by Zetafax are removed. These addresses can take some time to set up again, so take care not to disable the Email Gateway unless you really need to.

### Adding an email system

The first step in configuring the Email Gateway is to add Microsoft Exchange 2010 as a service in the **Email Gateway Services Configuration** dialog. At this stage you must ensure that the Zetafax Server is not running.

- Click the **Add Mail** button.

This option displays a dialog that allows you to choose the email systems that the gateway will serve.

- Select **Microsoft Exchange** and click the **Add** button.

Other email systems can be selected from this dialog, provided you have configured them correctly, as outlined in the appropriate [Email Gateway](#) topics.

- Click the **OK** button once you have installed all of the required email systems.

#### **Related topic**

[Configuring the Email Gateway for Microsoft Exchange 2010](#)



## Configuring the Email Gateway for Microsoft Exchange 2010

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The **Email Gateway Properties** dialog allows you to configure various settings for the Microsoft Exchange 2010 gateway. However, the **Zetafax Configuration** program will not allow you to proceed with the configuration of the Email Gateway unless you complete all of the steps described below.

#### **Properties**

- Click the **Configure** button.

This displays a sequence of dialogs that allow you to configure the Zetafax Email Gateway for use with Microsoft Exchange 2010.

- Leave **Polling interval** set to 1 second.

This is the interval that elapses between each occasion that the email submitter looks for new messages being forwarded by the connector.

- Highlight **Microsoft Exchange** in the **Email systems** column and click the **Setup** button.

This displays the **Microsoft Exchange Setup** dialog.

#### **Driver Information**

- Verify that the **Driver enabled** box is checked.

#### **Exchange Server Selection**

Choose an Exchange server from the **Exchange Server Selection** drop down box. The server list is compiled from the list of Exchange servers that have an associated Zetafax Connector. If no Zetafax Connectors have been set up in Active Directory, there will be no servers listed and you will not be able to enable the Email Gateway.

- Click the **Test connection** button to validate the connection to the chosen Exchange Hub Transport server.

If there are any problems with the connection, you should check that the path is valid and, if using the UNC notation, that a share has been created with the right permissions. If you are still experiencing problems with the connection, please refer to the support page on the [Equisys web site](#)



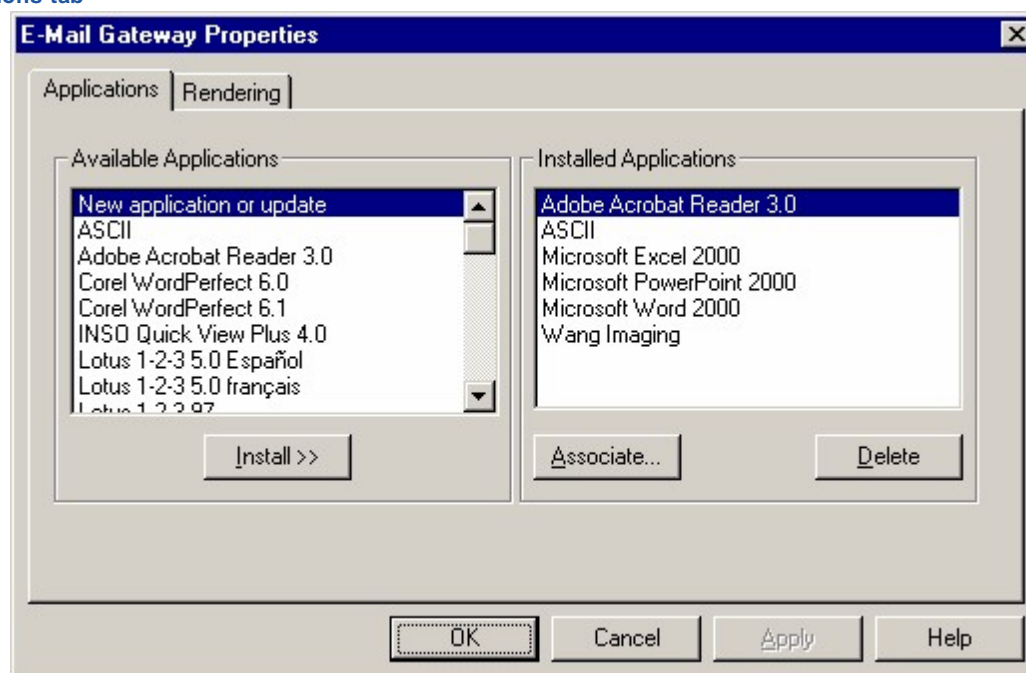


## Configuring rendering options

You now need to configure the rendering options for the Email Gateway. This section takes you through the stages of registering rendering applications, and installing the rendering printer driver at the Zetafax Server PC.

- Run **Zetafax Configuration**.
- Choose **Server settings** in the left pane.
- Select **Email Gateway** in the right pane.
- Click the **Rendering** button to display a dialog with two tabs, **Applications** and **Rendering**.

### Applications tab



The options on this tab allow you to register the applications you have installed on the Zetafax Server PC with the gateway. Typically, these are the most common applications used by your network users to send faxes.

If a network user attempts to send an email message with an attachment created by an application that has not been registered or installed on the Zetafax Server PC, the Email Gateway will be unable to process the message.

You will not be allowed to register an application from this dialog unless it has already been installed on the Zetafax Server PC. You should check that any rendering application you configure can be run without any dialogs being invoked or errors displayed on start up or shut down.

**Note:** Within this dialog, numerous versions of the same software are listed. It is important that the version of each application you specify exactly matches the version you are using on the Zetafax Server PC.

If users on your network are using multiple versions of the same applications, such as Office 2000, or Office 2002, you should install the latest version of the software on the Zetafax Server PC to generally ensure backwards compatibility.

You must install the **ASCII** driver as an absolute minimum. This is the driver which converts the text of the

email message itself.

If you want to allow users to send email messages from Exchange 2003 including formatted text (Rich Text), you should now choose the application which will be used to render rich text:

- Click **Associate** and associate the .RTF file extension with your Word processing package in the **Configure Associations** dialog that follows.

#### Rendering tab

This tab allows you to select the quality of rendering you require.

When configuring the Email Gateway for the first time, you **must** click on this tab to install the gateway's rendering printer driver. The e driver will then become visible the next time you start the Print Manager.

The printer driver will not be installed successfully under Windows Server 2003 unless the user account you are currently using has administrator privileges.



## Configuring Zetafax users to use the Email Gateway for MS Exchange 2010

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This section takes you through the process of configuring a single Zetafax user for the purposes of testing your installation. It also takes you through the stages of importing a list of email users which is necessary for setting up additional Zetafax users; for more information, see [Setting up Email Gateway users](#).

#### Setting up all Zetafax users to send and receive faxes (auto enrollment)

You may prefer to use the auto enrollment feature provided by the wildcard entries created during the user import. This option does not allow the administrator precise control over who will use the gateway, as each Exchange user sending a fax from an enabled domain will be auto enrolled and tallied by Zetafax until the licensed number of users is reached. At this point any further users you may need to use the gateway will be rejected.

The following table gives examples of the options:

- Click the **(All Exchange Users)** entry in the right pane of the **Email gateway users** list with the right mouse button and choose **Enable** from the pop-up menu.

In the **Enable Email Users** dialog, **Single shared** account will be the only option.

- Click the **OK** button to proceed:
- In the **Add new Zetafax email user profile** dialog, enter **MSX** and click **OK**.
- In the **Zetafax user details** dialog, click **OK**.

The enabled wildcard entry will now appear in the right pane of the **Email gateway users** list with the email user profile account as its Zetafax name.

#### Setting up a Zetafax user to send and receive faxes

- Choose the **Users and user groups** option from the left pane of the Zetafax Server's configuration program, ZFSETUP.
- Create a new Zetafax account by highlighting **Zetafax users** and choosing **Add new Zetafax user** (**Action** menu) button or alternatively select an existing account by highlighting the user's entry and selecting **Edit** (**Action** menu).

To allow a user to send messages from Microsoft Outlook via Zetafax:

- Check the box marked **Allow sending from Email Gateway**.

To allow a user to receive fax messages in their Microsoft Outlook Inbox:


- Check the box marked **Forward received messages via email**.

If either or both of these boxes are checked, it is important that a valid email username appears in the **Email username** box. If you have already created a list of Microsoft Exchange 2010 users, as described below, then this box will be completed automatically by Zetafax.

If the **Email username** box is still blank, click the **Browse** button to browse the current list of email users maintained by the Zetafax Server.

You can manually select a name from this list by highlighting it and clicking the **Select** button.

### Importing email user names

If there are no email users in the Zetafax Users list (shown by the following icon: ) , you must populate the list.

- Click the **Refresh** button.

Zetafax will start the Microsoft Exchange Import Service, which builds a list of the Microsoft Exchange 2010 users on the organization.

- Check the Exchange 2010 box. We recommend that you accept the default path.
- Click the **OK** button to begin the export.
- Highlight the email address of the Zetafax user you are configuring and click the **Select** button.

This will associate the email address of the user with their Zetafax address and configure them to use the gateway.



## Installing the Zetafax Connector for Microsoft Exchange 2007

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If you wish to enable extended functionality for user settings in an Exchange 2007 environment, before the Zetafax Connector is installed run the Zetafax Exchange Connector - Schema Utility, this can be found on your install CD. This helps you to prepare your active directory.

Also ensure that you are logged into the Microsoft Exchange 2007 server PC using the administrator account or an account with administrator privileges that is also a member of the Schema Admin's group.

If you have a previous version of the Zetafax connector on the Exchange 2007 server PC, you must uninstall it before installing the Zetafax connector for Exchange 2007. The Zetafax connector can be uninstalled using the **Add/Remove programs** control panel. You will need to reboot exchange to completely remove the connector.

In addition to the automatic install process for the Exchange 2007 Zetafax Connector, there is also a manual process to install the Zetafax Exchange Connector. Please see the technote on the [Equisys website](#) for more information.



## Enabling the Email Gateway for Microsoft Exchange 2007

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This section gives instructions for configuring the Email Gateway for Microsoft Exchange 2007.

Before you can configure the Zetafax Email Gateway for Microsoft Exchange 2007, the Zetafax Connector must have been successfully installed on the Microsoft Exchange 2007 server PC.

### Configuration

The Email Gateway is configured using **Zetafax Configuration**.

- Choose the **Server settings** option from the left pane and click the **Email Gateway** icon.

The default setting is for the Email Gateway to be disabled.

- Select the **Enabled** radio button to enable the Email Gateway.

Whenever you switch between **Enabled** and **Disabled**, all email addresses held by Zetafax are removed. These addresses can take some time to set up again, so take care not to disable the Email Gateway unless you really need to.

### Adding an email system

The first step in configuring the Email Gateway is to add Microsoft Exchange 2007 as a service in the **Email Gateway Services Configuration** dialog. At this stage you must ensure that the Zetafax Server is not running.

- Click the **Add Mail** button.

This option displays a dialog that allows you to choose the email systems that the gateway will serve.

- Select **Microsoft Exchange** and click the **Add** button.

Other email systems can be selected from this dialog, provided you have configured them correctly, as outlined in the appropriate [Email Gateway](#) topics.

- Click the **OK** button once you have installed all of the required email systems.

#### Related topic

[Configuring the Email Gateway for Microsoft Exchange 2007](#)



## Configuring the Email Gateway for Microsoft Exchange 2007

The **Email Gateway Properties** dialog allows you to configure various settings for the Microsoft Exchange 2007 gateway. However, the **Zetafax Configuration** program will not allow you to proceed with the configuration of the Email Gateway unless you complete all of the steps described below.

#### Properties

- Click the **Configure** button.

This displays a sequence of dialogs that allow you to configure the Zetafax Email Gateway for use with Microsoft Exchange 2007.

- Leave **Polling interval** set to 1 second.

This is the interval that elapses between each occasion that the email submitter looks for new messages being forwarded by the connector.

- Highlight **Microsoft Exchange** in the **Email systems** column and click the **Setup** button.

This displays the **Microsoft Exchange Setup** dialog.

#### Driver Information

- Verify that the **Driver enabled** box is checked.

#### Exchange Server Selection

Choose an Exchange server from the **Exchange Server Selection** drop down box. The server list is compiled from the list of Exchange servers that have an associated Zetafax Connector. If no Zetafax Connectors have been set up in Active Directory, there will be no servers listed and you will not be able to enable the Email Gateway.

- Click the **Test connection** button to validate the connection to the chosen Exchange Hub Transport server.

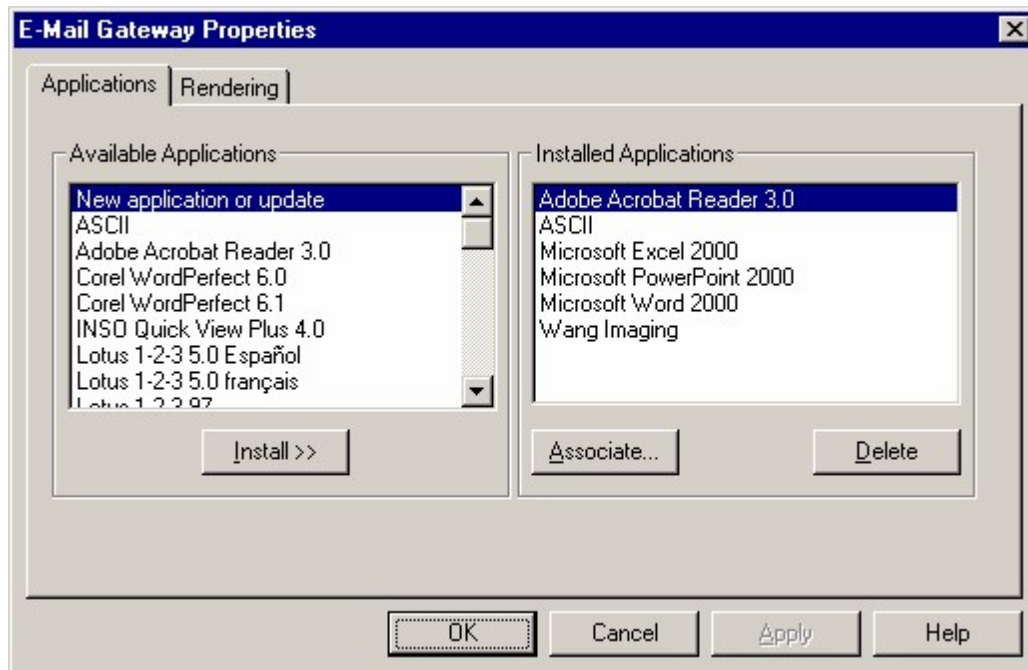
If there are any problems with the connection, you should check that the path is valid and, if using the UNC notation, that a share has been created with the right permissions. If you are still experiencing problems with the connection, please refer to the support page on the [Equisys web site](#)

## Configuring rendering options

You now need to configure the rendering options for the Email Gateway. This section takes you through the stages of registering rendering applications, and installing the rendering printer driver at the Zetafax Server PC.

- Run **Zetafax Configuration**.
- Choose **Server settings** in the left pane.
- Select **Email Gateway** in the right pane.
- Click the **Rendering** button to display a dialog with two tabs, **Applications** and **Rendering**.

### Applications tab



The options on this tab allow you to register the applications you have installed on the Zetafax Server PC with the gateway. Typically, these are the most common applications used by your network users to send faxes.

If a network user attempts to send an email message with an attachment created by an application that has not been registered or installed on the Zetafax Server PC, the Email Gateway will be unable to process the message.

You will not be allowed to register an application from this dialog unless it has already been installed on the Zetafax Server PC. You should check that any rendering application you configure can be run without any dialogs being invoked or errors displayed on start up or shut down.

**Note:** Within this dialog, numerous versions of the same software are listed. It is important that the version of each application you specify exactly matches the version you are using on the Zetafax Server PC.

If users on your network are using multiple versions of the same applications, such as Office 2000, or Office 2002, you should install the latest version of the software on the Zetafax Server PC to generally ensure backwards compatibility.

You must install the **ASCII** driver as an absolute minimum. This is the driver which converts the text of the

email message itself.

If you want to allow users to send email messages from Exchange 2003 including formatted text (Rich Text), you should now choose the application which will be used to render rich text:

- Click **Associate** and associate the .RTF file extension with your Word processing package in the **Configure Associations** dialog that follows.

#### Rendering tab

This tab allows you to select the quality of rendering you require.

When configuring the Email Gateway for the first time, you **must** click on this tab to install the gateway's rendering printer driver. The email rendering subsystem printer driver will then become visible the next time you start the Print Manager.

The printer driver will not be installed successfully under Windows Server 2003 unless the user account you are currently using has administrator privileges.



## Configuring Zetafax users to use the Email Gateway for MS Exchange 2007

This section takes you through the process of configuring a single Zetafax user for the purposes of testing your installation. It also takes you through the stages of importing a list of email users which is necessary for setting up additional Zetafax users; for more information, see [Setting up Email Gateway users](#).

### Setting up all Zetafax users to send and receive faxes (auto enrollment)

You may prefer to use the auto enrollment feature provided by the wildcard entries created during the user import. This option does not allow the administrator precise control over who will use the gateway, as each Exchange user sending a fax from an enabled domain will be auto enrolled and tallied by Zetafax until the licensed number of users is reached. At this point any further users you may need to use the gateway will be rejected.

The following table gives examples of the options:

- Click the **(All Exchange Users)** entry in the right pane of the **Email gateway users** list with the right mouse button and choose **Enable** from the pop-up menu.

In the **Enable Email Users** dialog, **Single shared** account will be the only option.

- Click the **OK** button to proceed:
- In the **Add new Zetafax email user profile** dialog, enter **MSX** and click **OK**.
- In the **Zetafax user details** dialog, click **OK**.

The enabled wildcard entry will now appear in the right pane of the **Email gateway users** list with the email user profile account as its Zetafax name.

### Setting up a Zetafax user to send and receive faxes

- Choose the **Users and user groups** option from the left pane of the Zetafax Server's configuration program, ZFSETUP.
- Create a new Zetafax account by highlighting **Zetafax users** and choosing **Add new Zetafax user** (**Action** menu) button or alternatively select an existing account by highlighting the user's entry and selecting **Edit** (**Action** menu).

To allow a user to send messages from Microsoft Outlook via Zetafax:

- Check the box marked **Allow sending from Email Gateway**.

To allow a user to receive fax messages in their Microsoft Outlook Inbox:


- Check the box marked **Forward received messages via email**.

If either or both of these boxes are checked, it is important that a valid email username appears in the **Email username** box. If you have already created a list of Microsoft Exchange 2007 users, as described below, then this box will be completed automatically by Zetafax.

If the **Email username** box is still blank, click the **Browse** button to browse the current list of email users maintained by the Zetafax Server.

You can manually select a name from this list by highlighting it and clicking the **Select** button.

### Importing email user names

If there are no email users in the Zetafax Users list (shown by the following icon: ) , you must populate the list.

- Click the **Refresh** button.

Zetafax will start the Microsoft Exchange Import Service, which builds a list of the Microsoft Exchange 2007 users on the organization.

- Check the Exchange 2007 box. We recommend that you accept the default path.
- Click the **OK** button to begin the export.
- Highlight the email address of the Zetafax user you are configuring and click the **Select** button.

This will associate the email address of the user with their Zetafax address and configure them to use the gateway.





## Installing the Zetafax Connector for Microsoft Exchange 2003

Before the Zetafax Connector is installed run the Zetafax Exchange Connector - Schema Utility, this can be found on your install CD. This helps you to prepare your active directory.

Also ensure that you are logged into the Microsoft Exchange 2003 server PC using the administrator account or an account with administrator privileges that is also a member of the Schema Admin's group.

Using the **Services** control panel, ensure that the following Microsoft Exchange 2003 services are installed and running:

- Microsoft Exchange Information Store
- Microsoft Exchange MTA stacks
- Microsoft Exchange System Attendant

The Zetafax Connector depends on these services and will not run unless they are all running.

If you have a previous version of the Zetafax connector on the Exchange 2003 server PC, you must uninstall it before installing the Zetafax connector for Exchange 2003. The Zetafax connector can be uninstalled using the **Add/Remove programs** control panel.

### Related topics

[Microsoft Exchange 2003 Zetafax Connector - Installation](#)

[Enabling the Email Gateway for Microsoft Exchange 2003](#)

[Configuring the Email Gateway for Microsoft Exchange 2003](#)

[Configuring rendering options](#)

[Configuring Zetafax users to use the Email Gateway for MS Exchange 2003](#)



## Microsoft Exchange 2003 Zetafax Connector - Installation

The Zetafax Connector for the Microsoft Exchange 2003 installation program should be run on the Microsoft Exchange 2003 server PC.

- Log on to Windows using an account with administrator privileges and member of the Schema Admin's group.
- Run the **Zetafax Connector for Exchange 2003** setup program.
- Follow the instructions on screen to install the Zetafax Connector on the Microsoft Exchange 2003 server PC. Click the **Next** button to begin installation.

If you need to remove the connector at a later date, it is important that you do so by using the **Add/Remove programs** control panel. Do not attempt to uninstall the connector manually.

All the necessary programs to ensure correct operation of the email gateway including the Zetafax Connector for this routing group, the extensions for the Microsoft Exchange System Manager program, and the client addressing templates, will be installed on this server.

### Add Zetafax personal folders

Once Setup has copied all of the relevant files to your computer, the final screen will ask you whether you wish to install the Zetafax personal folders onto this computer.

The Zetafax personal folders contain the Outlook forms and Zetafax Outlook Extensions that must be installed on each client computer wishing to send faxes from within Microsoft Outlook. The installation of the Zetafax Outlook Extensions on client computers is described later in this section.

### Starting the Zetafax Connector

The Zetafax Connector should now be visible from within the main **Microsoft Exchange System Manager** program window. It is installed into the **Connectors** container for the default routing group of the current Exchange 2003 server.

#### Start the connector

Once the Setup process is complete, you should check the Zetafax Connector service from the Services control panel.

- Double-click the **Services** control panel.
- Highlight the **Zetafax Connector** service and check that it is running.

The first time the Zetafax Connector service is started, it is important to check that there are no errors reported. If there are, check the event log for further information.

#### Automatic startup

The Setup program sets the Zetafax Connector service **Startup Type** to **Automatic**, to be consistent with all of the other Microsoft Exchange 2003 services. This ensures the Zetafax Connector service will start up automatically each time the computer is restarted.



## Enabling the Email Gateway for Microsoft Exchange 2003

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This section gives instructions for configuring the Email Gateway for Microsoft Exchange 2003.

Before you can configure the Zetafax Email Gateway for Microsoft Exchange 2003, the Zetafax Connector service must have been successfully installed and running as a service on the Microsoft Exchange 2003 server PC.

### Configuration

The Email Gateway is configured using **Zetafax Configuration**.

- Choose the **Server settings** option from the left pane and click the **Email Gateway** icon.

The default setting is for the Email Gateway to be disabled.

- Select the **Enabled** radio button to enable the Email Gateway.

Whenever you switch between **Enabled** and **Disabled**, all email addresses held by Zetafax are removed. These addresses can take some time to set up again, so take care not to disable the Email Gateway unless you really need to.

### Adding an email system

The first step in configuring the Email Gateway is to add Microsoft Exchange 2003 as a service in the **Email Gateway Services Configuration** dialog. At this stage you must ensure that the Zetafax Server is not running.

- Click the **Add Mail.** button.

This option displays a dialog that allows you to choose the email systems that the gateway will serve.

- Select **Microsoft Exchange** and click the **Add** button.

Other email systems can be selected from this dialog, provided you have configured them correctly, as outlined in the appropriate [Email Gateway](#) topics.

- Click the **OK** button once you have installed all of the required email systems.

**Related topic**[Configuring the Email Gateway for Microsoft Exchange 2003](#)

## Configuring the Email Gateway for Microsoft Exchange 2003

The **Email Gateway Properties** dialog allows you to configure various settings for the Microsoft Exchange 2003 gateway. However, the **Zetafax Configuration** program will not allow you to proceed with the configuration of the Email Gateway unless you complete all of the steps described below.

**Properties**

- Click the **Configure.** button.

This displays a sequence of dialogs that allow you to configure the Zetafax Email Gateway for use with Microsoft Exchange 2003.

- Leave **Polling interval** set to 1 second.

This is the interval that elapses between each occasion that the email submitter looks for new messages being forwarded by the connector.

- Highlight **Microsoft Exchange** in the **Email systems** column and click the **Setup** button.

This displays the **Microsoft Exchange Setup** dialog.

- Ensure the **Connector address type name** is set to FAX.
- Verify that the **Driver enabled** box is checked.

**Connector path**

- Before you validate the connection to the Zetafax Connector, ensure that **Exchange Connector Path** points to the installation directory where you installed the Zetafax Connector.

If the Zetafax Server is running on a separate PC to the Microsoft Exchange 2003 server, the pathname should be entered using the UNC notation (\\computer name\share name); for example, \\SERVER\ZFCONNECT. You must have full permission on this folder.

If you are running the Zetafax Server on the same computer as the Microsoft Exchange 2003 server, then a local path can be entered using a drive letter; for example:

C:\PROGRAM FILES\EXCHSRVR\CONNECT\ZETAFAQ.

- Click the **Test connection** button to validate the information you have entered for the Zetafax Connector.

If there are any problems with the connection, you should check that the path is valid and, if using the UNC notation, that a share has been created with the right permissions. If you are still experiencing problems with the connection, please refer to the support page on the [Equisys web site](#).

- If the connection to the Zetafax Connector is successful, click the **OK** button to exit the **Microsoft Exchange Setup Service** dialog.

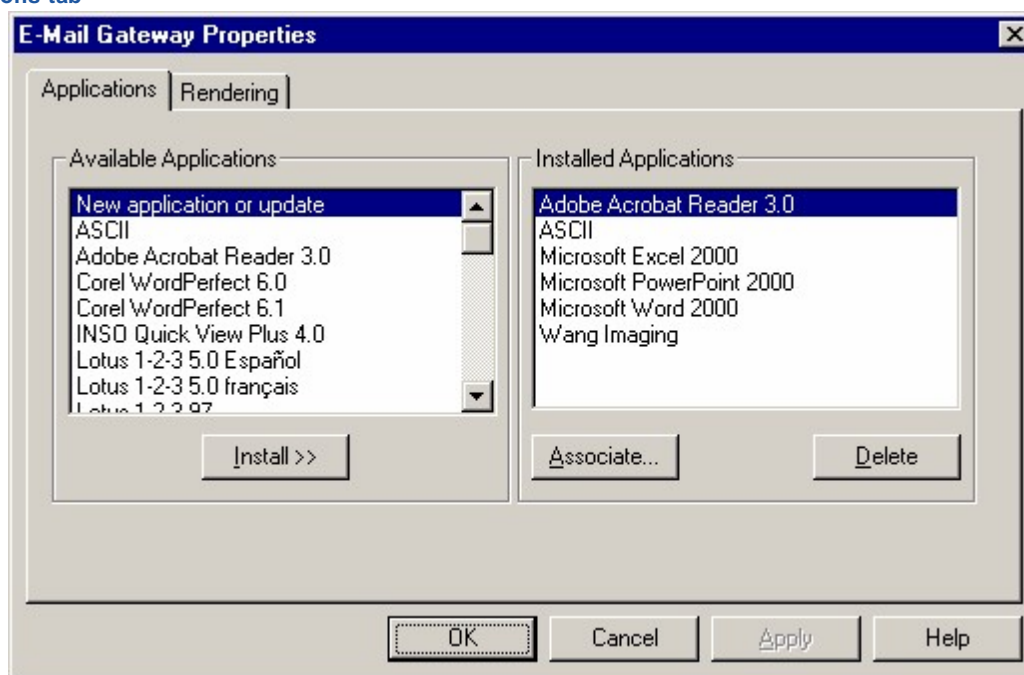


## Configuring rendering options

You now need to configure the rendering options for the Email Gateway. This section takes you through the stages of registering rendering applications, and installing the rendering printer driver at the Zetafax Server PC.

- Run **Zetafax Configuration**.
- Choose **Server settings** in the left pane.
- Select **Email Gateway** in the right pane.
- Click the **Rendering** button to display a dialog with two tabs, **Applications** and **Rendering**.

### Applications tab



The options on this tab allow you to register the applications you have installed on the Zetafax Server PC with the gateway. Typically, these are the most common applications used by your network users to send faxes.

If a network user attempts to send an email message with an attachment created by an application that has not been registered or installed on the Zetafax Server PC, the Email Gateway will be unable to process the message.

You will not be allowed to register an application from this dialog unless it has already been installed on the Zetafax Server PC. You should check that any rendering application you configure can be run without any dialogs being invoked or errors displayed on start up or shut down.

**Note:** Within this dialog, numerous versions of the same software are listed. It is important that the version of each application you specify exactly matches the version you are using on the Zetafax Server PC.

If users on your network are using multiple versions of the same applications, such as Office 2000, or Office 2010, you should install the latest version of the software on the Zetafax Server PC to generally ensure backwards compatibility.

You must install the **ASCII** driver as an absolute minimum. This is the driver which converts the text of the

email message itself.

If you want to allow users to send email messages from Exchange 2003 including formatted text (Rich Text), you should now choose the application which will be used to render rich text:

- Click **Associate** and associate the .RTF file extension with your Word processing package in the **Configure Associations** dialog that follows.

#### Rendering tab

This tab allows you to select the quality of rendering you require.

When configuring the Email Gateway for the first time, you **must** click on this tab to install the gateway's rendering printer driver. The email rendering subsystem printer driver will then become visible the next time you start the Print Manager.

The printer driver will not be installed successfully under Windows Server 2003 unless the user account you are currently using has administrator privileges.



## Configuring Zetafax users to use the Email Gateway for MS Exchange 2003

This section takes you through the process of configuring a single Zetafax user for the purposes of testing your installation. It also takes you through the stages of importing a list of email users which is necessary for setting up additional Zetafax users; for more information, see [Setting up Email Gateway users](#).

### Setting up all Zetafax users to send and receive faxes (auto enrollment)

You may prefer to use the auto enrollment feature provided by the wildcard entries created during the user import. This option does not allow the administrator precise control over who will use the gateway, as each Exchange user sending a fax from an enabled domain will be auto enrolled and tallied by Zetafax until the licensed number of users is reached. At this point any further users you may need to use the gateway will be rejected.

The following table gives examples of the options:

- Click the **(All Exchange Users)** entry in the right pane of the **Email gateway users** list with the right mouse button and choose **Enable** from the pop-up menu.

In the **Enable Email Users** dialog, **Single shared** account will be the only option.

- Click the **OK** button to proceed:
- In the **Add new Zetafax email user profile** dialog, enter **MSX** and click **OK**.
- In the **Zetafax user details** dialog, click **OK**.

The enabled wildcard entry will now appear in the right pane of the **Email gateway users** list with the email user profile account as its Zetafax name.

### Setting up a Zetafax user to send and receive faxes

- Choose the **Users and user groups** option from the left pane of the Zetafax Server's configuration program, ZFSETUP.
- Create a new Zetafax account by highlighting **Zetafax users** and choosing **Add new Zetafax user** (**Action** menu) button or alternatively select an existing account by highlighting the user's entry and selecting **Edit** (**Action** menu).

To allow a user to send messages from Microsoft Outlook via Zetafax:

- Check the box marked **Allow sending from Email Gateway**.

To allow a user to receive fax messages in their Microsoft Outlook Inbox:


- Check the box marked **Forward received messages via email**.

If either or both of these boxes are checked, it is important that a valid email username appears in the **Email username** box. If you have already created a list of Microsoft Exchange 2003 users, as described below, then this box will be completed automatically by Zetafax.

If the **Email username** box is still blank, click the **Browse** button to browse the current list of email users maintained by the Zetafax Server.

You can manually select a name from this list by highlighting it and clicking the **Select** button.

### Importing email user names

If there are no email users in the Zetafax Users list (shown by the following icon: ) , you must populate the list.

- Click the **Refresh** button.

Zetafax will start the Microsoft Exchange Import Service, which builds a list of the Microsoft Exchange 2003 users on the organization.

- Check the Exchange 2003 box. We recommend that you accept the default path.
- Click the **OK** button to begin the export.
- Highlight the email address of the Zetafax user you are configuring and click the **Select** button.

This will associate the email address of the user with their Zetafax address and configure them to use the gateway.



## Zetafax Email Gateway for Lotus Notes

This section gives an overview of using the Zetafax Email Gateway with Lotus Notes, and step-by-step instructions for configuring the Zetafax Email Gateway for Lotus Notes. It assumes that a Zetafax Server has been installed and is running on your network.

The installation process requires configuration of both the Zetafax Server using **Zetafax Configuration** and the Lotus Notes Domino server administration tools. We recommend that the person who configures the Email Gateway for Lotus Notes is familiar with both programs.

### Introduction

The Zetafax Email Gateway may be used with Lotus Notes version 5 to 8.0, and is supported under Windows Server 2012, 2008 or 2003. There is a single component to the Email Gateway when using it with Lotus Notes: an email submitter program. The Lotus Notes Domino server will also need some additional configuration to prepare it for use with Zetafax.

### Email submitter

The submitter program is a Zetafax Server module that runs on the fax server machine alongside the other Zetafax Server modules. Its function is to monitor both outgoing messages from the gateway which are submitted to the Zetafax Server's queue, and incoming fax messages which are passed to the Lotus Notes database.

### Extra requirements

The Email Gateway requires installation of a Lotus Notes client on the same machine as the Email Gateway itself; i.e. the Zetafax Server PC.

You will also need to use the Lotus Notes Domino server administration tools to install a router mailbox and a foreign domain on the Lotus Notes Domino server, and to dedicate a user account for use with the gateway.

### Separate fax server

The Zetafax Server can either be run on the same computer as the Lotus Notes Domino server or on a separate PC elsewhere on the network. Whichever set up you choose, you must install a Lotus Notes client on the Zetafax Server PC.

The installation procedure described here is applicable to either scenario.

### Overview

To install the Zetafax Email Gateway for Lotus Notes, you will need to follow the steps below, and which are described in further detail later in this section. See the [Related topics](#) for more information.

- Choose the Lotus Notes Domino server and domain on which you wish to install the gateway and install a router mailbox and foreign domain for the gateway.
- Install a full Lotus Notes client on the Zetafax Server PC.
- Set up the Email Gateway using the **Zetafax Configuration** program, register the email system, and test the connection to the Lotus Notes Domino server.
- Install the email rendering printer driver and any rendering applications.
- Configure Zetafax users to use the Email Gateway.

The descriptions of Lotus Notes in this section are taken from Lotus Notes release 6.0. Although details may differ between this and earlier versions, the underlying principles of configuring and using Lotus Notes with the Zetafax Email Gateway remain the same.

**Related topics**

[Configuring a Lotus Notes Domino server](#)  
[Installing a Lotus Notes client on the Zetafax Server](#)  
[Enabling the Email Gateway for Lotus Notes](#)  
[Configuring the Email Gateway for Lotus Notes](#)  
[Configuring rendering options](#)  
[Providing the Zetafax options for Lotus Notes](#)  
[Sending a fax using Lotus Notes](#)  
[Email Gateway settings](#)  
[Lotus Notes Setup Service](#)





## Configuring a Lotus Notes Domino server

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We assume that a Lotus Notes Domino server has been installed and is working on your network. You need to decide which Lotus Notes Domino server within your domain is to host the Email Gateway.

### Preparation

Before you can use the Zetafax Email Gateway with Lotus Notes, you must set up facilities within Lotus Notes which allow messages to be routed between its own databases and the Zetafax Server. You will need to create the following:

- A Lotus Notes user who will act as a manager for the Zetafax gateway facilities in Lotus Notes.
- A foreign domain to serve as the gateway to the Zetafax Server.

In addition, the router mailbox database, MAIL.BOX, which is responsible for holding emails in transit to the Zetafax Server, needs to be configured with the correct permissions.

### Related topics

[Creating a Lotus Notes user](#)

[Creating a router mailbox](#)

[Specifying access rights](#)

[Defining a foreign domain](#)

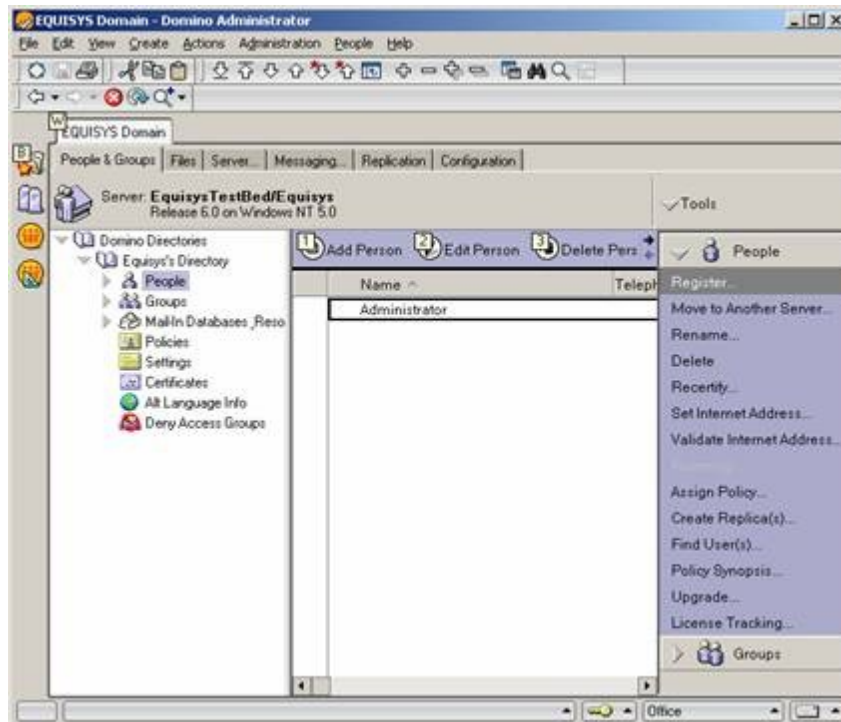


## Creating a Lotus Notes user

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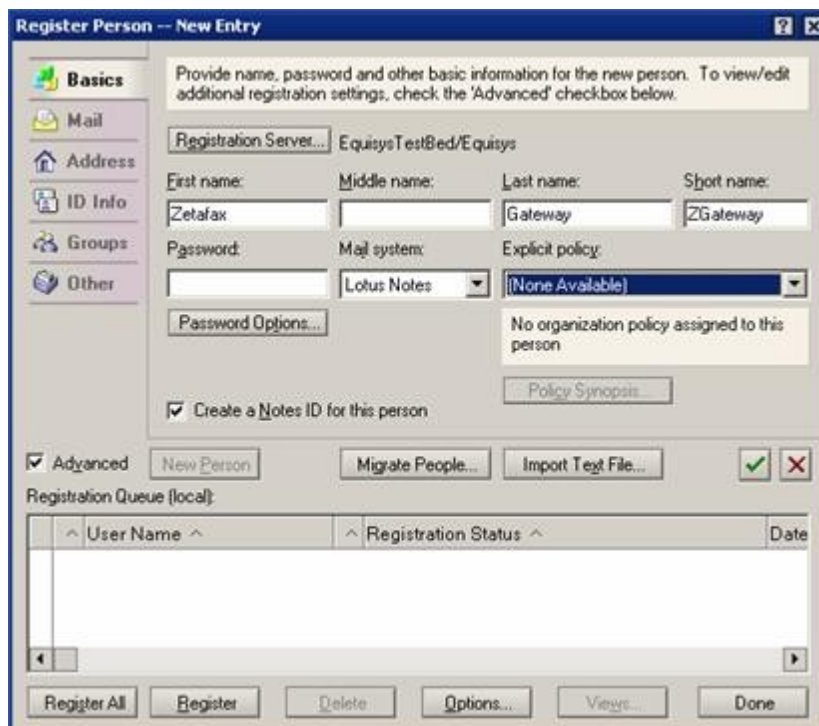
Open the Domino Administrator. Open the 'People & Groups' tab.

- In the Tools list on the right-hand side, click **People** then on **Register**.

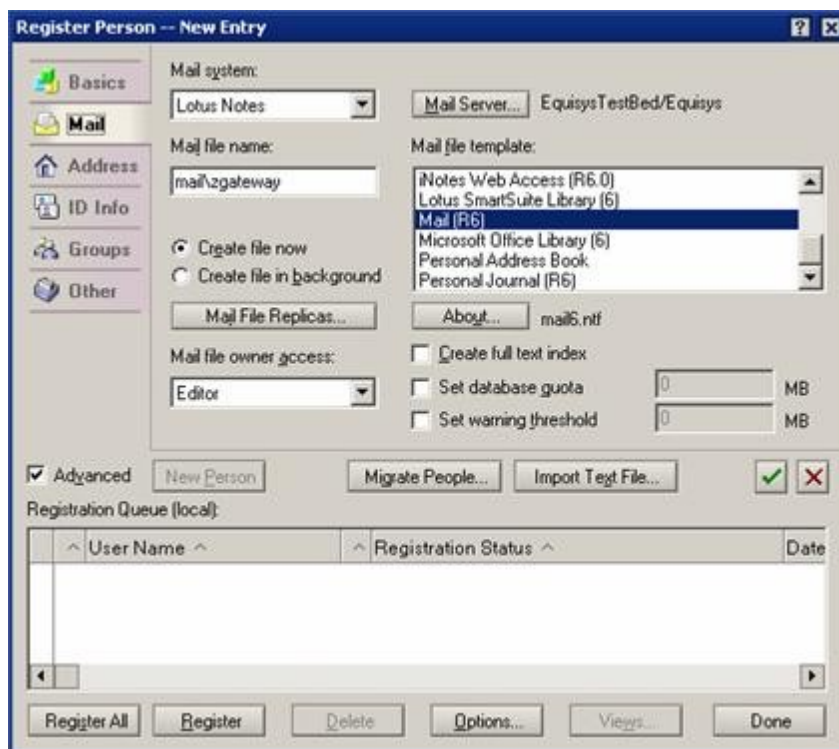


**Note:** If prompted enter the Certifier password and click OK on the warning messages about recovery information.

- When the **Register Person** dialog box appears, check the **Advanced** checkbox in the lower-middle left.
- On the **Basics** tab, assign a username to the Zetafax Mail Gateway user, such as **Zetafax Gateway**.



- On the **Mail** tab, ensure that the Mail system is set to Lotus Notes and you have selected the appropriate Mail Server.



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**Register Person -- New Entry**

☒ Create a Notes ID for this person

**Certifier ID Information**

☐ Use CA process    Certifier ID: /Equisys

Security type: North American    Certificate expiration date: 04/24/2005 06:41:33 PM

**Location for storing user ID**

☐ In Domino directory

☒ In file: Set ID File... C:\program files\...\ids\people\zgateway.id

☐ In mail file

☒ Advanced    New Person    Migrate People...    Import Text File...    [Green Tick] [Red X]

**Registration Queue (local):**

^	User Name ^	Registration Status ^	Date

Register All    Register    Delete    Options...    Views...    Done

- Click on the green tick to add the created user, and then click on **Register**. This will save the user's details to the Domino server database. You should receive a **Person registered successfully!** message.



## Creating a router mailbox

The next stage is to create a mail router mailbox database. The router mailbox acts as a database to hold mail in transit to the Zetafax Server. We will use a standard Lotus Notes template to create the router mailbox.

- In the Domino Administrator's menu, select **File|Application|New**. In the resulting dialog, select the Domino server and enter a title for the new database such as **Routing for Zetafax**, and the filename **FAX.NSF**.
- Make sure **Show Advanced Templates** is ticked, and then select **Mail Router Mailbox (R8)** as the template for the database.
- Click the **OK** button to create the database.



## Specifying access rights

The next stage in the configuration is to grant manager access rights to the Zetafax Email Gateway user for the Zetafax router database, Lotus Domino mail router database and the public address book.

To set the access rights for the Zetafax router database (FAX.NSF):

1. In the Domino Administrator open the Zetafax router database (FAX.NSF). If you have any problems see the example below.
2. Select **File|Application|Access Control**. This will display the **Access Control List** dialog.
3. Click the **Add** button. This will display the **Add User** dialog box. Click the icon representing a Lotus Domino user. This will display the **Select Names** dialog box.
4. At the top of the dialog, select the **server's address book** from the drop down list to display the Zetafax Gateway user you set up earlier. Highlight the user and click on **Add >**
5. Click the OK button to return to the Access Control List dialog box.
6. In the **Access Control List** dialog box, select the Zetafax Gateway user and in the **Attributes Access** box select **Manager**.
7. Click the **Delete Documents** check box to select it.
8. Click the OK button to confirm these access rights.

To set the access rights for the Mail Router database (MAIL.BOX):

In the Domino Administrator open the Mail Router database (MAIL.BOX). Repeat steps 2 to 8 as above so that the Zetafax user also has **Manager Access** and **Delete Documents** on the MAIL.BOX database.

To set the access rights for the Domino Directory (NAMES.NSF):

In the Domino Administrator open the Domino Directory (NAMES.NSF). Repeat steps 2 to 8 as with the last two sections so that the Zetafax user also has **Manager Access** and **Delete Documents** on the NAMES.NSF database.



## Defining a foreign domain

Finally, you need to define a foreign domain in the Public Address book to serve as the gateway to the Zetafax Server. This will allow faxes sent from Notes to be forwarded to FAX.NSF.

- In the Domino Administrator client, click on the **Configuration** tab in the tabs pane. Expand the **Server** entry in the left-hand tasks pane, and then click on **Configurations**.
- Go to the **Create|Server|Domain** menu. This will display the **New Domain** screen.

**Note:** If the Create menu is not visible, click on the blank space in the middle of the window to get the full menu.

- On the **Basics** tab select the Domain type **Foreign Domain**. Enter the Foreign Domain Name as **FAX** and enter a Domain description like **Zetafax Gateway** as above.
- Click the **Mail Information** tab. Enter the Gateway server name with the Server Name/Certifier Name details, then in the Gateway mail file name, enter **FAX.nsf**.
- It is not normally necessary to alter any of the other default settings when creating a new domain. Click **Save & Close** then exit from the Domino Administrator. The domain is then ready to begin exchanging mail with Zetafax.





## Installing a Lotus Notes client on the Zetafax Server

In order for the Zetafax Email Gateway to communicate with the Lotus Notes Domino server you must work through the following steps:

- Install the Lotus Notes client on the Zetafax Server system.
- Run the Lotus Notes client program, it will prompt you to specify a user name ensuring that the Get registration ID from a file check box on the initial login screen is selected. When prompted, browse to ID file for the Zetafax User you created earlier (see [Creating a Lotus Notes user](#) for more information). This will be located on the Domino server and will usually have the extension ID (e.g. zgateway.id).

### Testing the foreign domain

You have now completed all the necessary steps to configure Lotus Domino/Notes. Before proceeding to configure Zetafax, you should now test the FAX foreign domain.

- On a users system send a test message from a Lotus Notes user to the following recipient:

TEST@1122@FAX

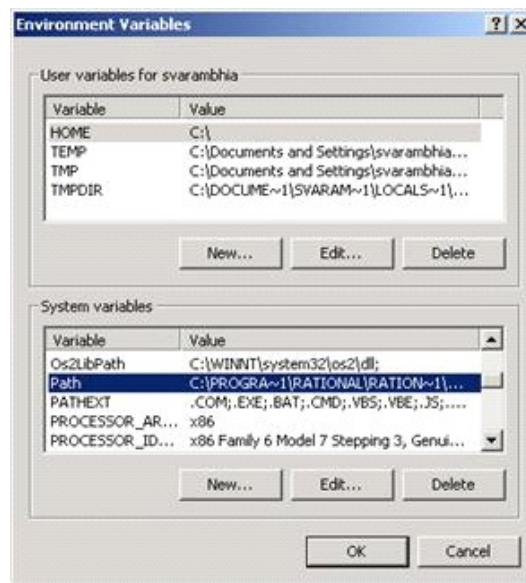
- On the Zetafax Server system log on to a Lotus Notes client using the special Zetafax user you created earlier.
- Open FAX.NSF database. The message you sent will be in the Zetafax mail router database.



## Registering the nnotes.dll

Before you can enable the Email Gateway for Lotus Notes you need to ensure the Zetafax Configuration program can locate the Lotus Notes API. You do this by editing the Zetafax Server's path to reflect the location:

1. Using the search feature in windows locate the nnotes.dll file, and make a note of its location. e.g. 'C:\Program Files\Lotus\notes' (note on your system this may be different).
2. Right-click the '**My Computer**' icon on the desktop and select '**Properties**'.
3. Click on the '**Advanced**' tab, then '**Environment Variables...**' you will have the following dialog box;



4. In the '**System variables**' scroll down to the variable path then click '**Edit**'.



5. In the '**Variable Value**' add the following string to the end of the path:

**<path to nnotes.dll>**

**Note:** you must add the semicolon to separate the previous entry from the one you have just added. Also **DO NOT** delete any of the previous entries.





## Enabling the Email Gateway for Lotus Notes

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This topic gives instructions for configuring the Email Gateway for Lotus Notes.

### Configuration

The Email Gateway is configured using **Zetafax Configuration** .

- Choose **Server settings** from the left pane and select the **Email Gateway** icon.

The default setting is for the Email Gateway to be disabled. In this state, it is possible to configure Zetafax to route incoming faxes automatically using MAPI.

- Select the **Enabled** radio button to enable the Email Gateway.

Whenever you switch between **Enabled** and **Disabled** , all email addresses held by Zetafax are removed.

### Related topic

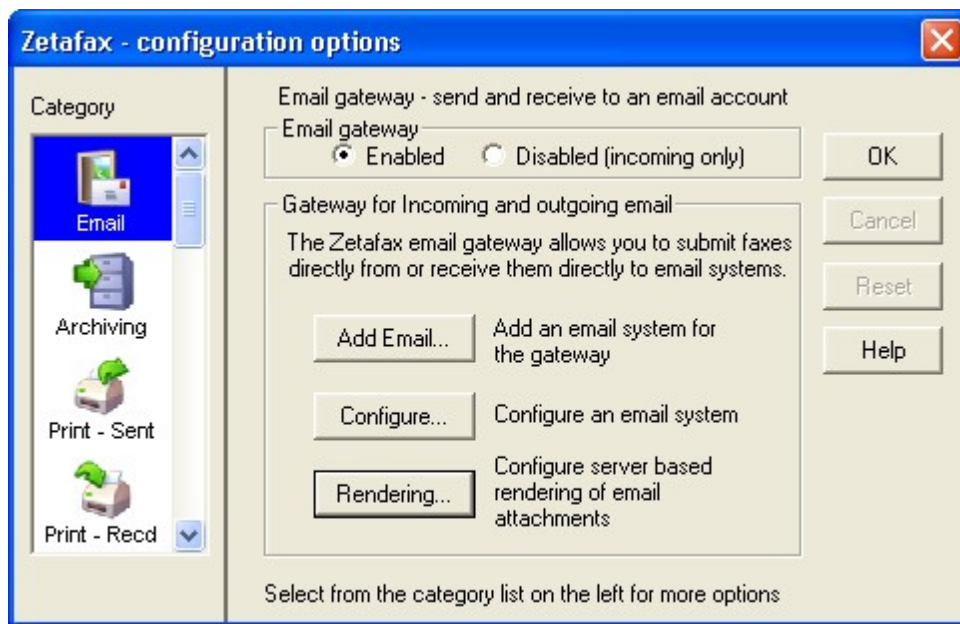
[Configuring the Email Gateway for Lotus Notes](#)



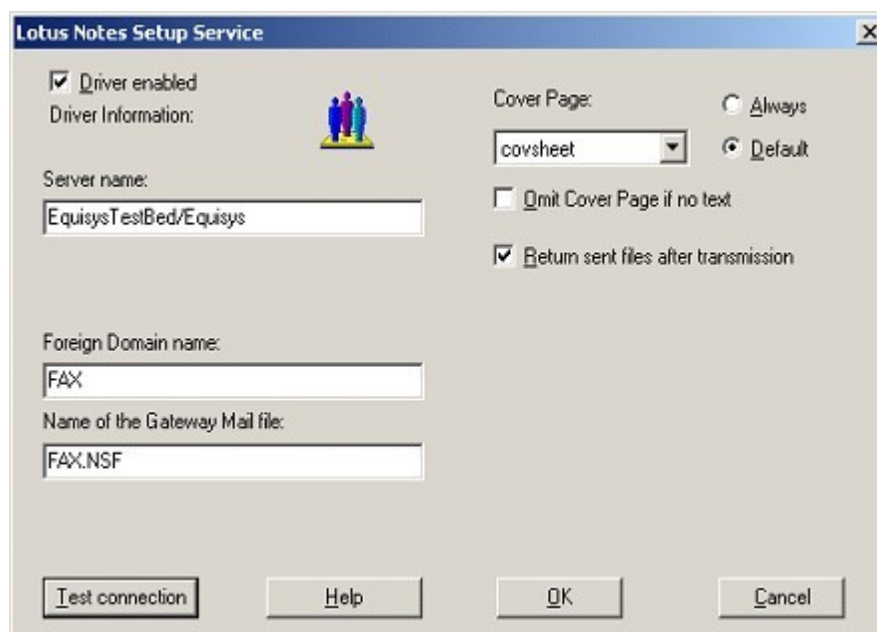
## Configuring the Email Gateway for Lotus Notes

Now that the Domino server and Notes have been configured, you must configure the Zetafax Mail Gateway. First shut down the Zetafax Server service or application.

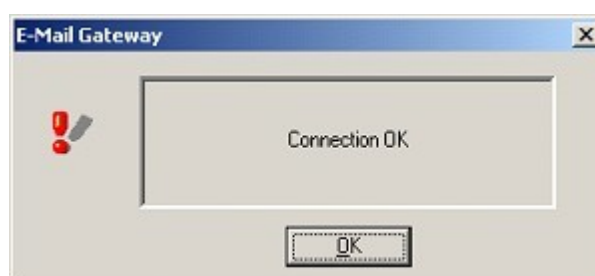
1. Start up the Zetafax configuration program.
2. Browse to the **Server settings** section, and double click the **Email Gateway** option:



3. Click '**Add Email...**'. In the list of Available Drivers select '**Lotus Notes**' then click '**Add>>**' then '**OK**'.
4. You will now be back to the '**Zetafax – Configuration options**' dialog box. Click '**Configure...**'
5. Under '**E-Mail systems**' select '**Lotus Notes**' then click '**Setup**'. The '**Lotus Notes Setup Service**' dialog box will be displayed (as below).



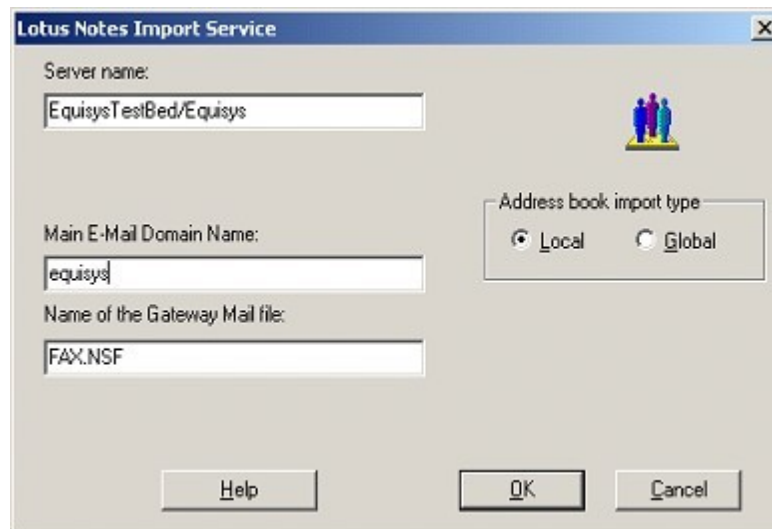
6. From here administrators can select the default cover sheet that will be used for all submitted faxes from this Domino server.
7. Enter the name of the Domino server then click '**Test Connection**'. If the server and Notes client have been configured correctly then you will receive the following confirmation message.



8. Click '**OK**', then '**OK**' again, you will now be back to the '**Zetafax – Configuration options**' dialog box. Click '**Rendering...**'
9. In the list of '**Available Applications**' select '**Microsoft WordPad 1.0**' click '**Install>>**' then click the '**Rendering**' tab. Once presented with rendering options click the '**Applications**' tab then '**OK**' to exit from the rendering options dialog box.
10. **Note:** for further information on rendering applications, see [Configuring further rendering options](#).
11. You will now be back to the '**Zetafax – Configuration options**' dialog box. Click '**OK**'. You will be prompted with the following option.



12. Click '**Yes**'. When prompted with '**Lotus Notes Import Service**' enter the server and E-Mail Domain names of the Domino server then click '**OK**' as below:



13. Zetafax has now exported a list of current Domino users. You will be prompted to create new Zetafax users. At this point click '**No**'. You will be prompted to enable users at this point, again click '**No**'. The configuration of the E-mail gateway is now complete.



## Configuring further rendering options

You may need to configure the rendering options for the Email Gateway. This section takes you through the stages of registering rendering applications, and installing the rendering printer driver at the Zetafax Server PC.

- Run **Zetafax Configuration**.
- Choose the **Change server settings** option.
- Click the **Rendering** button to display a dialog with two tabs, **Applications** and **Rendering**.

### Applications tab

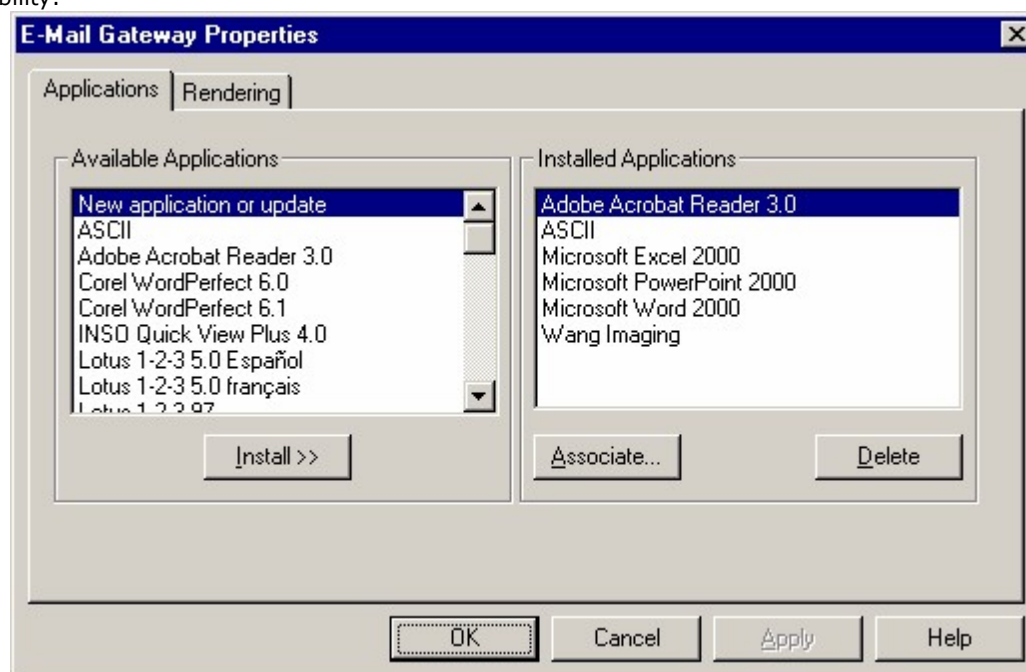
The options on this tab allow you to register the applications you have installed on the Zetafax Server PC with the gateway. Typically, these are the most common applications used by your network users to send faxes.

If a network user attempts to send an email message with an attachment created by an application which has not been registered or installed on the Zetafax Server PC, the Email Gateway will be unable to process the message.

You will not be allowed to register an application from this dialog unless it has already been installed on the Zetafax Server PC. You should check that any rendering application you configure can be run without any dialogs being invoked or errors displayed on start up or shut down.

**Note:** Within this dialog, numerous versions of the same software are listed. It is important that the version of the applications you specify matches exactly the version you are using on the Zetafax Server PC.

If users on your network are using multiple versions of the same applications, such as Office 2003 or Office 2010, you should install the latest version of the software on the Zetafax Server PC to ensure backwards compatibility.



You must install the **ASCII** driver as an absolute minimum. This is the driver which converts the text of the email message itself.

If you want to allow users to send email messages from Exchange including formatted text (Rich Text), you should now choose the application which will be used to render rich text.

- Click **Associate** and associate the .RTF file extension with your Word processing package in the **Configure Associations** dialog which follows.

#### Rendering tab

This allows you to select the quality of rendering you require.

When configuring the Email Gateway for the first time, you **must** click on this tab to install the gateway's rendering printer driver. The email rendering subsystem printer driver will then become visible the next time you start the Print Manager.



## Providing the Zetafax options for Lotus Notes

While composing an email that is to be sent to a fax recipient email users may specify various sending options such as choice of cover sheet or letter head to be used with their fax.

To provide these options on Domino users workstations, the Zetafax options for Lotus Domino must be installed using the following steps:

- [Installing the Zetafax options for Lotus Notes](#)
- [Setting the permissions on the imported template files](#)
- [Modifying the email template database](#)
- [Modifying the public address book database template](#)



## Installing the Zetafax options for Lotus Notes

The Zetafax options for Lotus Notes are provided in a single executable `zfax \MAIL\MAILNOTES\UPNOTES.EXE`, where `zfax` is the Zetafax Server's base directory specified on installation.

### To install the Zetafax options for Lotus Notes

- Run UPNOTES.EXE from the directory `zfax\MAIL\MAILNOTES` on the Zetafax Server machine.
- Amend the default values for the Address Book Templates section as follows:

'Zetafax template': `<zfax>\MAIL\MAILNOTES\ENU\FAXNAMES.NTF`

'Template to be upgraded': `<Domino server data folder>\PUBNAMES.NTF` Amend the default values for the Mail File Templates section as follows:

'Zetafax template': `<zfax>\MAIL\MAILNOTES\ENU\FAXMAIL80.NTF`

'Template to be upgraded': `<Domino server data folder>\MAIL8.NTF`

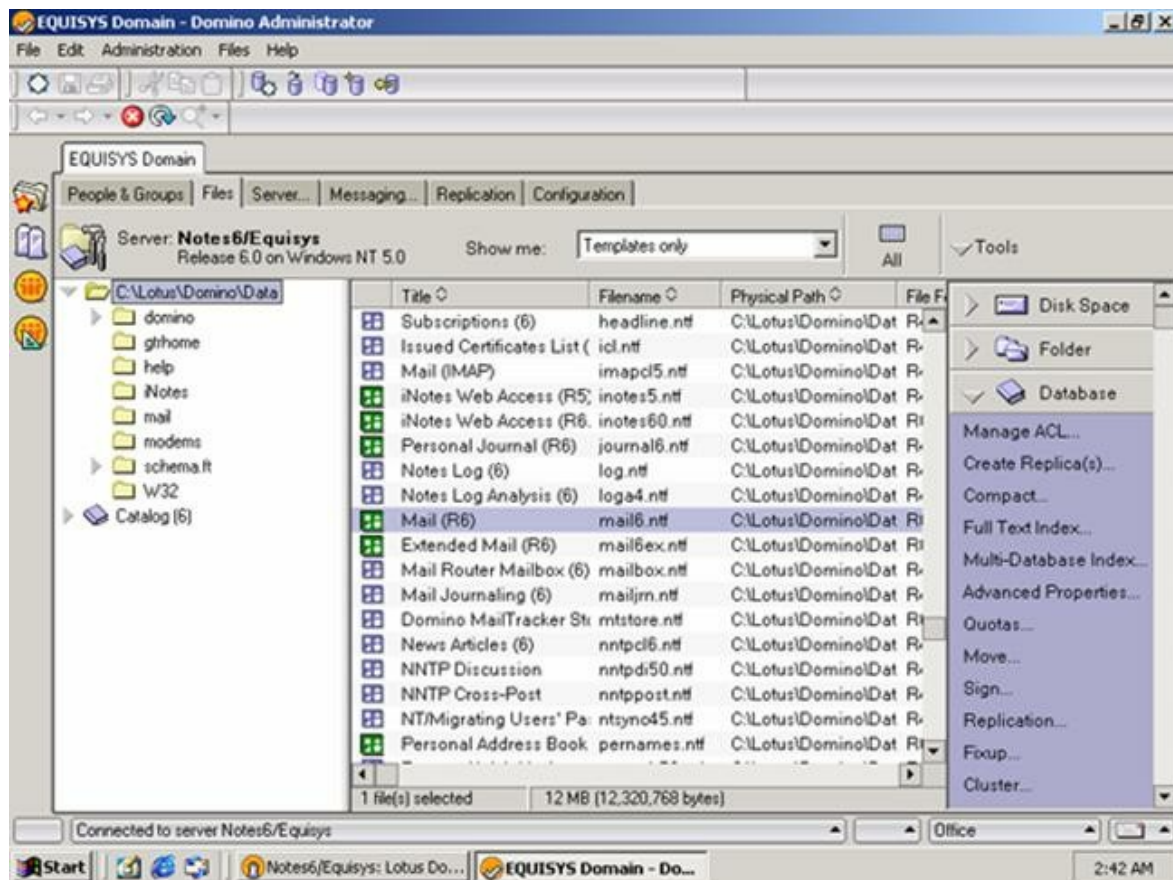
Where '**<zfax>**' is the path to the Zetafax Server's base directory, and where '**<Domino server data folder>**' is your Domino server data directory, e.g. `'C:\Lotus\Domino\Data\'`. You may need to temporarily share your Domino server data directory on the network to do this. FAXMAIL60.NTF is the Zetafax mail template file for Notes 6 and 6.5.

- Click on 'OK'. You will be reminded that you need to modify the templates manually as well, and then the necessary items will be added to both the templates.
- **Note:** you may find that Upnotes.exe is unable to access the ntf files when the Domino server is running. If this is the case you can either try shutting down the Domino server while you do the update, or you can shut down the router - go to the Domino server console and type 'tell router quit'. Run the update then type 'load router'.

## Setting the permissions on the imported template files

Once the Database template files have been imported, you need to sign them using the Domino Administrator:

1. Start the Domino administrator, connecting to the database you just uploaded the template files into.
2. Click on the **'Files'** tab, and in the **show me** option select **Templates only**.
3. Locate the listing for **Mail (R8)**, **Mail8.ntf** file, highlight it then click the **sign...** button:



4. Confirm the user details you are about to sign the templates then click **OK**.





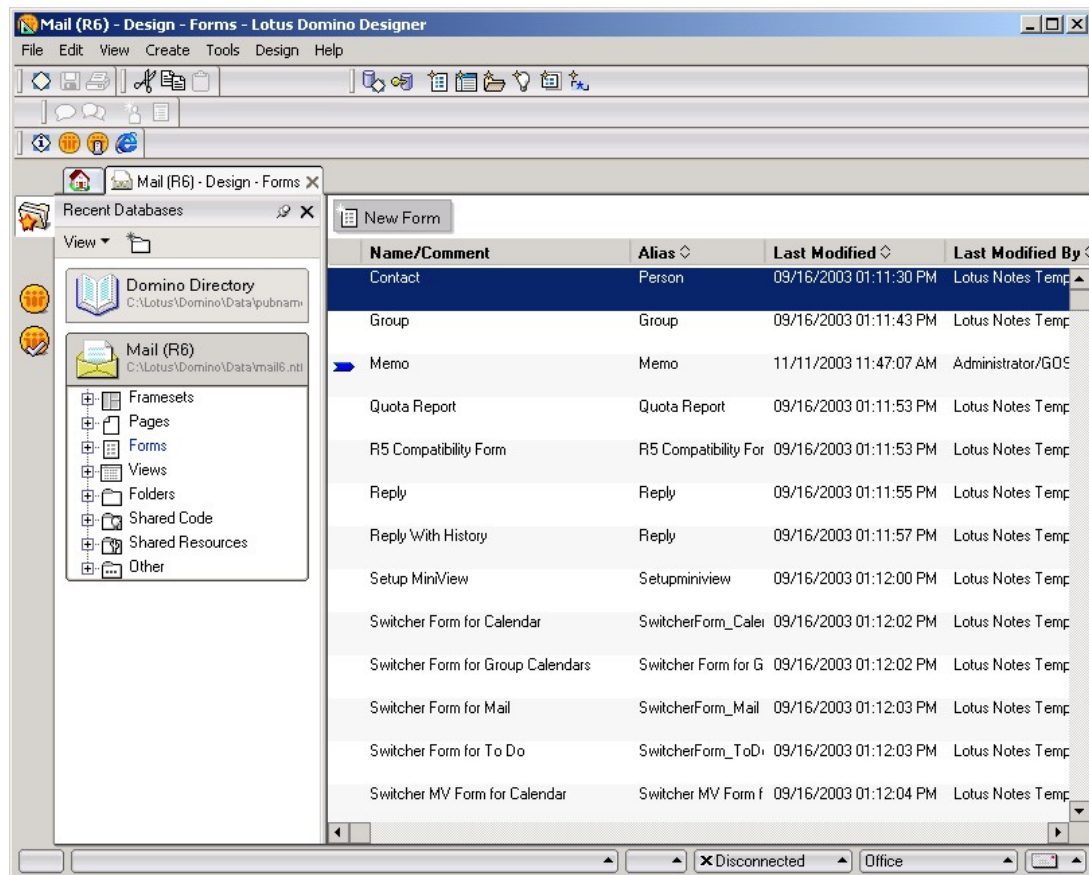
5. Once the database files have been signed, the status monitor at the bottom will confirm that the database has been processed with no errors.
6. Locate the listing for **Domino Directory**, **Pubnames.ntf** file, highlight it then click the **sign...** button.
7. Confirm the user details you are about to sign the templates then click **OK**.
8. Once the database files have been signed, the status monitor at the bottom will confirm that the database has been processed with no errors.



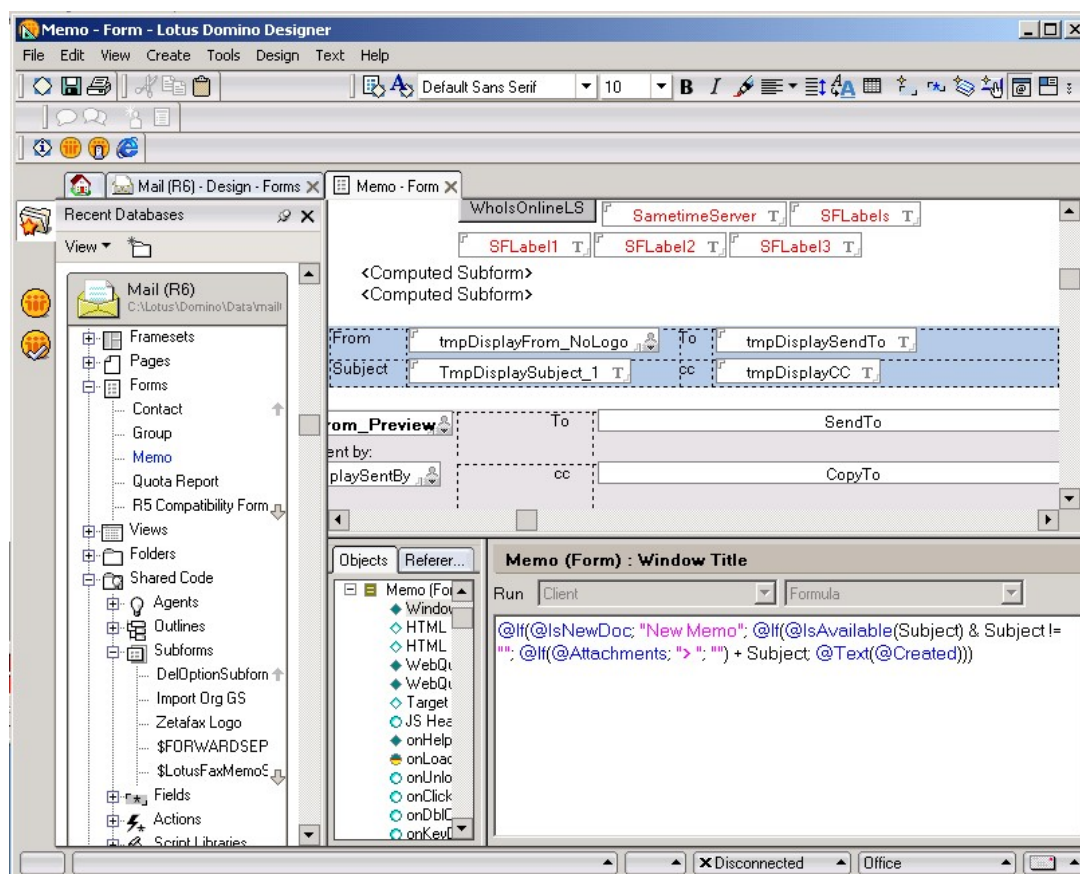
## Modifying the mail template database

Once the template databases have been updated, you need to insert the Zetafax sub-forms and then refresh the database design or wait until Notes does its scheduled refresh.

1. In the 'Domino Designer', open MAIL8.NTF.
2. By default, the Memo form will be selected. Double-click on it to view its design.



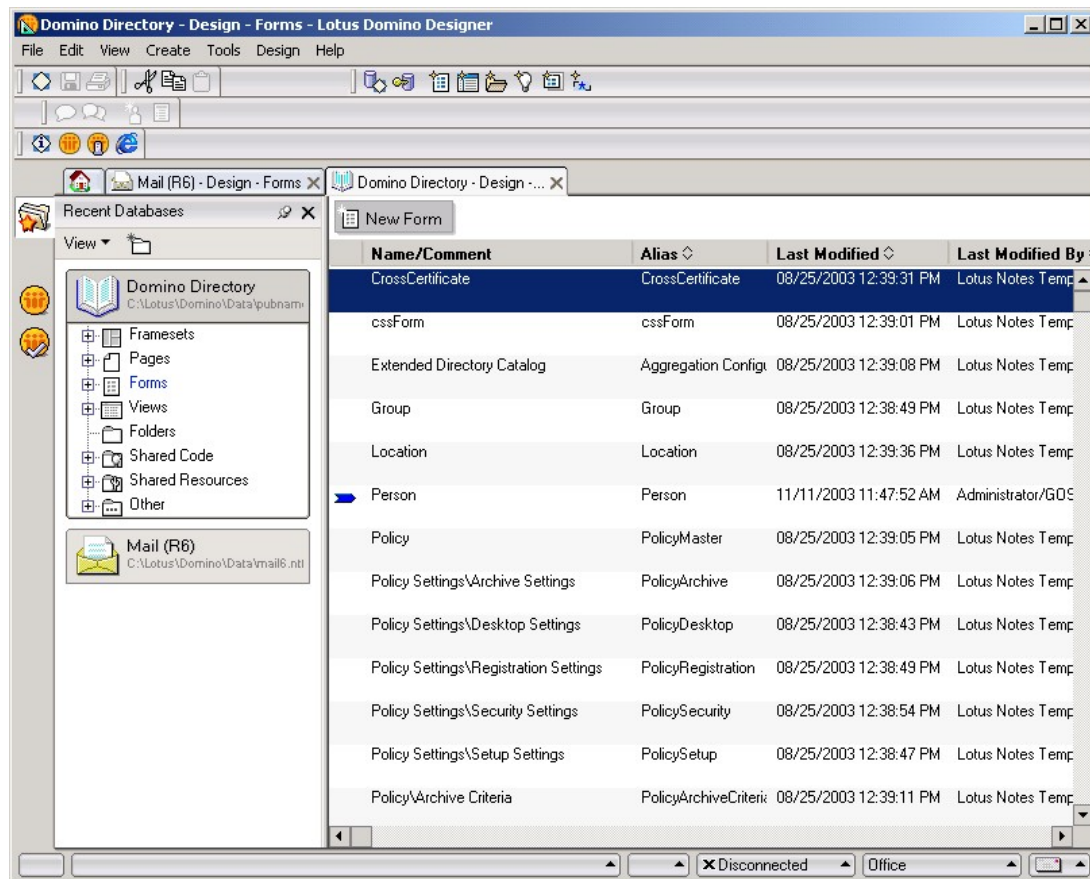
- Place your cursor beneath the second instance of <Computed Subform>, then go to Create>Resource>InsertSubform, and select 'Zetafax Action'.



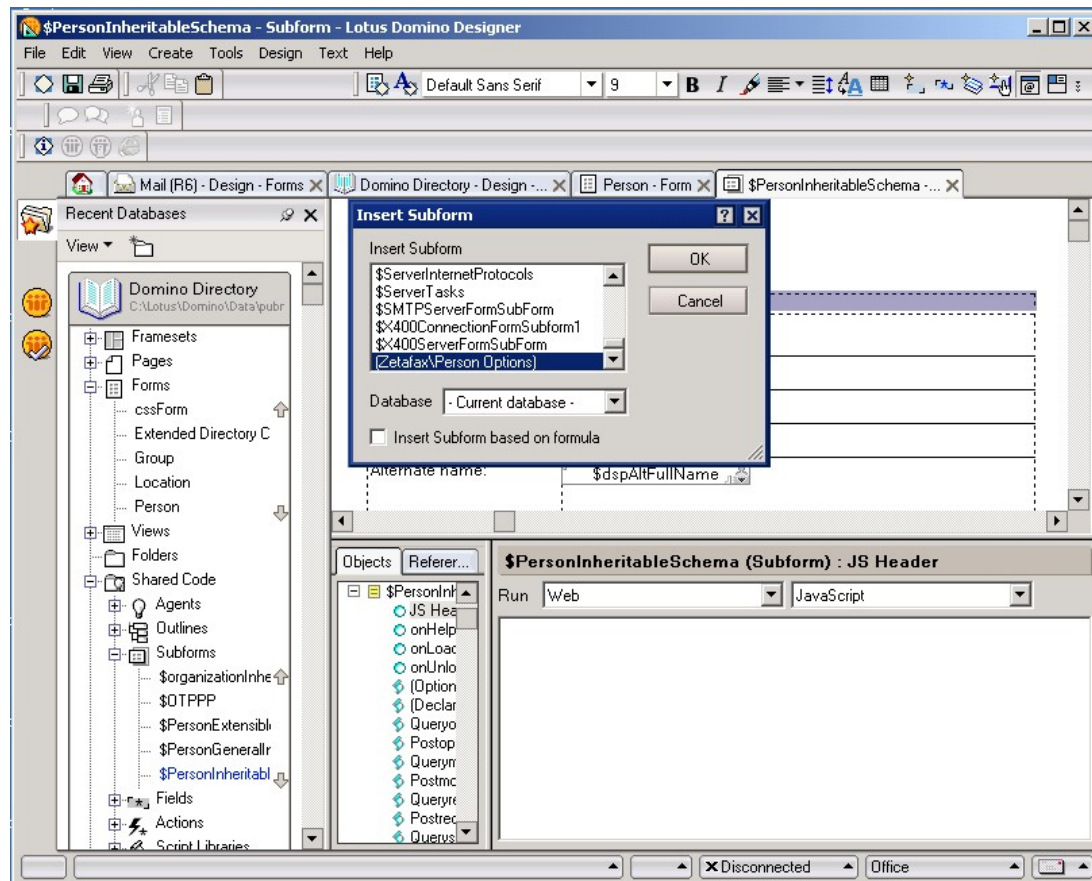
4. Select File>Save.
5. Right-click on the 'Mail (R8)' entry in the left-hand column, then select Refresh>Design. Select the server you are configuring, then click 'OK', and then 'Yes'.
6. One you have updated the mail template database, every Notes user's mail database will need a design refresh. The best way of going about this depends on the details of your Domino server(s) installation. It may be sufficient to wait for the scheduled refresh to take place. Alternatively, there are a couple of ways of forcing a refresh.
  - a) You can run the 'user upgrade wizard' to send every user an email which allows them to trigger an update – see the Notes help on 'upgrading Notes mail files' to see how to do this. You can trigger an update from the Domino admin console; run the Domino Administrator and select Live console and Enable. At the prompt, type tell router quit – the router will now stop processing mail.
  - b) Now type in load convert -r mail\\*.nsf \* mail6.ntf. The console will now display the databases being converted. When this has completed, type in load router to start the router.

## Modifying the public address book database template

1. In the 'Domino Designer', open PUBNAMES.NTF.
2. By default, the Person form will be selected. Double-click on it to view its design.



3. Scroll down to the tabs, double click to open the subform, and place your cursor in the "Other" tab, then go to Create>Resource>Insert Sub-form, and select 'Zetafax Action'.



4. Go to File>Save.
5. Right-click on the 'Domino Directory' entry in the left-hand column, then select Refresh>Design. Select the server you are configuring, then click 'OK', and then 'Yes'.

After completion, verify that the Zetafax Default and People view are present. You will need to refresh each address book database manually or wait until Notes does its daily refresh.



## Configuring Zetafax users to use the Email Gateway for Lotus Notes

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Once the gateway is installed, you can configure Zetafax users to both send and receive fax messages from their Lotus Notes software.

This section describes the process of configuring a single Zetafax user in order to test your installation. It also takes you through the stages of importing a list of email users which is necessary for setting up additional Zetafax users, for more information, see [Setting up Email Gateway users](#) and [Managing user accounts using Lotus Notes](#) as it is also possible to enable email users to use the Zetafax gateway using the Lotus Notes public address book.

### Listing users

The **Lotus Notes Import Service** dialog allows you to build a list of Lotus Notes users on your site which is used by **Zetafax Configuration**, when Zetafax users are configured to use the gateway.

It is convenient to create the list at this point. However if you do not do so, you will have a further opportunity to create it when configuring Zetafax users.

The gateway will remember your Lotus Notes connection information from the previous screen and display it here.

- Choose whether you wish to import addresses from the local or global address book.
- Click the **OK** button to begin the import.

### Setting up users

- Click **Users and user groups** option from the **Zetafax Configuration** main menu and select the **Zetafax users** option.

If you have an existing user configured, you can enable this user to use the Email Gateway by highlighting the user's entry and clicking the **Edit** button. Alternatively, to create a new user, click the **New** button.

To allow a user to send messages from Lotus Notes via Zetafax:

- Check the box marked **Allow sending from Email Gateway**.

To allow a user to receive fax messages in their mailbox:

- Check the box marked **Forward received messages via email**.

### Email username

If either or both of these boxes are checked, it is important that a valid email username appears in the **Email user name** box. If you have already created a list of Lotus Notes users for this site, as described in [Listing users](#) above, then this box will be completed automatically by Zetafax.

If the **Email user name** box is still blank, click the **Browse** button to browse the current list maintained by the Zetafax Server.

You can manually select a name from this list by highlighting it and clicking the **Select** button.

If you chose not to create this list earlier, or have added email users to your system since the last time this list was created by Zetafax, click the **Refresh** button to update the list of Lotus Notes users.



## Sending a fax using Lotus Notes

The Zetafax Email Gateway is now configured and ready to use. This section describes the steps for sending a simple email message through the gateway.

### To send a fax

- Launch your Lotus Notes client using a mailbox of a user configured to use the Zetafax Email Gateway.
- Open the email database from your workspace and click the **New Memo** button.
- You can submit a fax through the Lotus Notes gateway by specifying an address, in the following format, in the **To:** field of the **New Memo** dialog:

<recipientname>@<fax number>@FAX

For example:

Sam Smith@123 456 7890@FAX

If you wish the company name to appear on the cover sheet then you should include this after the recipient name within the square brackets. For example:

Sam Smith[Jones Brothers]@171 456 7899@FAX

- Click the **OK** button and fill in the subject field and a short note in the main message body.
- Use the paper clip icon to **Attach** your document. This will be converted and combined with your main message into a fax for sending by Zetafax.
- Click the **Send** button to send your fax.

### To send a fax from your address book (Office Fax)

- Launch your Lotus Notes client using a mailbox of a user configured to use the Zetafax Email Gateway.
- Open the email database from your workspace and click the **Create** Menu then click **Zetafax Memo** button.
- Start typing the name of the Contact in your address book into the **To:** field.
- The **Office Fax** field will be automatically used instead of the email address.
- Alternatively you can click the **To:** hyperlink and browse for the Contact instead.
- Click the **OK** button and fill in the subject field and a short note in the main message body.
- Use the paper clip icon to **Attach** your document. This will be converted and combined with your main message into a fax for sending by Zetafax.
- Click the **Send** button to send your fax.

**Note:** Only the **Zetafax Memo** form can be used with the Contact's Office Fax number. This functionality is unavailable using the standard **New Memo**.

### Related topic

[Specifying message options in Lotus Notes](#)

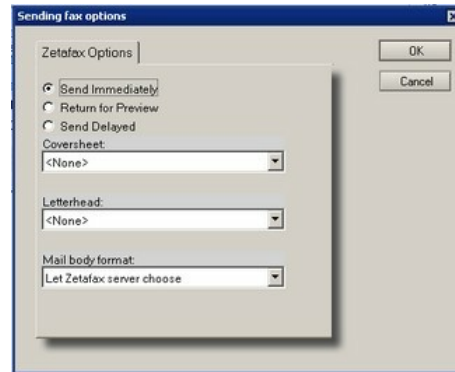


## Specifying message options in Lotus Notes

Before sending an email you can override any default message options you may have already configured.

- Click the **Zetafax option** button to select your fax options to be sent with the message.
- Select the **Return for preview** option if you would like to preview the fax before releasing it to be sent by the Zetafax Server.
- Finally, send the email message.

Provided you selected the **Return for preview** option, once the message has been converted by the Zetafax Server it will be returned to you and appear in your Inbox for preview. You can preview the fax by opening the email message and double clicking on the fax attachment.



Use the **Send Delayed** option to delay the sending of the fax i.e. off peak. The fax will be submitted to Zetafax by Lotus Notes when you click **Send**, but will queue on the Zetafax Server till the time specified is reached.

#### Notification

After a few minutes the gateway will send a response by email to your Lotus Notes Inbox, indicating whether the message was sent successfully or not.

If the fax was sent successfully, you should enable more email users using the **Zetafax Configuration** program. Setting up users is described in more detail in [Setting up Email Gateway users](#).

If the message failed, you should confirm that you followed all of the installation stages and refer to the Support pages on the Equisys web site at <http://www.equisys.com/support>.





## Zetafax Email Gateway for SMTP

This section describes the process of installing and configuring the Zetafax SMTP gateway, and configuring the existing SMTP email server to operate with it.

### Introduction

There are three major components of a setup of the Zetafax SMTP gateway:

- The existing SMTP email server.
- The Zetafax SMTP server.
- The Zetafax email submitter.

These are described in the following sections:

### Existing SMTP Email server

This is the server program at the heart of your existing SMTP email system. When a user sends an email message using a standard email client program, this SMTP email server receives the message and dispatches it to the destination. Once the SMTP email server has been configured for use with the Zetafax SMTP server, it detects any messages addressed to the domain fax (for example to 1770-123-4567@fax) and passes them instead to the Zetafax SMTP server for sending as fax messages.

There are many SMTP email server and client programs available. Because SMTP is an Internet standard, the single version of the Zetafax SMTP Email Gateway is designed to work with all SMTP email programs. The Zetafax SMTP Email Gateway has been verified with the following SMTP email server programs:

- MS Exchange 2007
- MS Exchange 2003
- Software.Com PostOffice 3.5
- Qualcomm Eudora WorldMail Server 2.0
- Sendmail for UNIX 8.9

and with the following client programs:

- MS Outlook 2007
- MS Outlook 2003
- MS Outlook 2002
- MS Outlook 2000
- MS Outlook Express 4 & 5
- Qualcomm Eudora 4.3
- Qualcomm Eudora Light 3.0

For an up-to-date list, see the Equisys web site: [www.equisys.com](http://www.equisys.com).

The SMTP server may be running on a Windows XP Professional, Windows 2000, or Windows 98 computer, or on a UNIX computer.

### Zetafax SMTP server

The Zetafax SMTP server program (ZFSMTPGW.EXE) is the Zetafax program that receives messages from the SMTP email server, converts them into fax messages, and sends them to the Zetafax Server for transmission as fax messages.

### Zetafax email submitter

The email submitter program (STM32.EXE) is a component of the Zetafax email gateway that runs as an additional Zetafax Server module on the Zetafax Server computer alongside the other Zetafax Server

modules such as the Queue Manager, QM.EXE, and the Address Book Manager, ADB.EXE.

Its function is to monitor both outgoing messages from the Zetafax SMTP server, which it submits to the Zetafax Server, and incoming fax messages, which it passes to the Zetafax SMTP server and then to the user via the SMTP email server.

The email submitter is installed by default but needs to be enabled, as described in detail below.

### Overview

To set up a system using the Zetafax SMTP server, you need to follow these steps:

- Ensure that an SMTP email server and the Zetafax Server are already installed on your network.
- Install the Zetafax SMTP server on your network. This will usually be on the same computer as the Zetafax Server, and **must** not be on the same computer as the SMTP email server.
- Configure the SMTP email system to direct messages addressed to the domain 'FAX' to the Zetafax SMTP server.
- Configure the Zetafax Email Gateway using the **Zetafax Configuration** program, enable the email system, and test the connection to the SMTP email server.
- Configure the Zetafax Email Gateway rendering options.
- Configure Zetafax users to use the Email Gateway.
- Send a test message via the Zetafax SMTP server.

These steps are described in greater detail in the following sections.

Since this requires configuration of both the Zetafax Server using the **Zetafax Configuration** program and of the SMTP email server, it is recommended that the installation is carried out by someone who is familiar with both programs.

### Ensuring that SMTP and Zetafax Servers are installed

- Ensure that an SMTP email server and the Zetafax Server are already installed on your network.

To install an SMTP email server, follow the instructions in the documentation supplied with it.

To install the Zetafax Server, see the [Installation section](#).

### Related topics

[Installing the Zetafax SMTP server](#)

[Configuring the SMTP email system](#)

[Configuring the Zetafax Email Gateway for SMTP](#)

[Configuring the Zetafax Email Gateway rendering options for SMTP](#)

[Configuring Zetafax users to use the Email Gateway for SMTP](#)

[SMTP Email Setup Service](#)

[Email Gateway settings](#)



## Zetafax SMTP gateway overview

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The Zetafax e-mail gateway for SMTP allows users of SMTP e-mail systems to send and receive faxes directly from their e-mail client application.

By addressing an e-mail to a fax domain, the message is passed to the Zetafax Server, via a Zetafax SMTP server and converted into fax format for sending.

The Zetafax SMTP server is configured with your SMTP mail system by the following parameters.

### Domain Name

This must correspond to your corporate SMTP mail server domain address.  
(e.g. yourdomain.com)

### DNS Server

IP address of the DNS server authoritative for your domain.  
(e.g. 192.168.0.1)

### Data Directory

Working directory of the Zetafax SMTP Server to store any incoming faxes or notification messages. It must point to the path selected during the Zetafax SMTP server installation.

### Receive Port and Send Port

The Receive and Send Ports are set to 25 (default SMTP port) unless the Zetafax SMTP server is on the same machine as the main SMTP server (not recommended) or you are using customized ports.

### Receipt 'FROM'

Name or email address that will appear in the 'FROM' section of message receipts routed through the SMTP Gateway.



## Installing the Zetafax SMTP server

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The Zetafax SMTP server requires Windows 2003 and can be installed on the same computer as the Zetafax Server. It should not be installed on the same computer as the existing SMTP email server.

### To install the Zetafax SMTP server

- Insert the Zetafax CD into the CD drive.

The CD will automatically run the Welcome program, which will direct you to the installation files. If it does not run the program automatically:

- Click the **Start** button, and then click **Run**.
- Enter D:\RUNME, where D is the letter of your CD drive.
- Click the **OK** button.
- Follow the on-screen instructions to start the Zetafax SMTP server installation program.
- In the **Choose destination location** and **Choose data location** dialogs, click the **Next>** button to use the recommended location, or click the **Browse...** button to specify an alternative location.
- Continue to follow the on-screen instructions.
- In the **Setup Complete** dialog, do not uncheck **Launch the Zetafax SMTP Control Panel applet**.
- Click the **Finish** button.

The **Zetafax SMTP Server Configuration** dialog is displayed:

- In the **Domain name** field enter the domain name of the SMTP email server; for example yourdomain.com.
- In the **DNS server** field enter the IP address of the DNS server; for example 192.168.0.1.
- Click the **OK** button.
- Continue to follow the on-screen instructions.

You will be prompted to restart the server.

- Click the **Yes** button.

This completes the installation of the Zetafax SMTP server.

You can alter the configuration of the Zetafax SMTP server at a later time from the **Zetafax SMTP Server Configuration** control panel.



## Configuring the SMTP email system

- Configure your SMTP email system to direct messages addressed to the domain fax to the Zetafax SMTP server.

Most SMTP email systems use DNS for domain name to IP address resolution or some other static representation like HOST files. When using DNS, domain names are resolved by sending DNS name queries to a configured DNS server. The DNS server is a computer that stores domain name-to-IP address mapping records or has knowledge of other DNS servers.

The DNS server resolves the queried domain name (e.g. fax) to an IP address and sends the result back. Configuring

DNS or HOSTS for use Zetafax is required, allowing the SMTP email system to easily communicate with the Zetafax SMTP Gateway.

Below is an example of configuring Microsoft Windows 2003 Server DNS for use with the SMTP email system and the Zetafax SMTP Gateway.

Add a new **Host (A)** and a **Mail Exchange (MX)** records to the DNS System

- From you DNS Server, go to Control Panel | Administrator Tools | DNS
- From your current Domain, Add a New Host called "fax". Set the IP address to the Zetafax SMTP Server.
- From your current domain, add a New Mail Exchange for the "fax" host.

Test your DNS configuration using Telnet.

- Open a command prompt and type the following:  
**TELNET FAX 25**
- Perform this test from both the Mail Server and the Zetafax Gateway server.
- If configured correctly you should see a response from the Zetafax SMTP gateway similar to the following:  
**220 yourdomain.com Service Ready**
- If not, use the Microsoft DNS online help to rectify the problem. Once you have successfully confirmed name resolution of the FAX domain you are ready to configure the Zetafax email gateway for SMTP.

**NOTE:** Since each SMTP email system has its own configuration procedure; if you need additional instructions on doing this please consult the SMTP email server's own documentation.



## Configuring the Zetafax email gateway for SMTP

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The Zetafax email gateway is configured using the **Email gateway** configuration dialog, opened automatically at the end of the install sequence. If you subsequently need to change the configuration, you can open this dialog from the **Zetafax Configuration** program (**Server Settings** folder).

- In the **Email gateway** configuration dialog, click the **Add Mail...** button.
- In the **Email Gateway Services Configuration** dialog, select **SMTP Mail** in the **Available Drivers** list, and click the **Add>>** button.
- Click the **OK** button to close the dialog.
- In the **Email gateway** configuration dialog, click the **Configure...** button.
- In the **Email Gateway Properties** dialog, select **SMTP Mail**, and then click the **Setup** button.
- In the **SMTP Mail Setup Service** dialog, enter the data location in the **SMTP Mail Path** field; for example:

C:\Program Files\Zetafax SMTP Server\Data

If during the installation of the Zetafax SMTP server you specified a different location in the **Choose data location** dialog, instead enter the destination folder that you specified at that time.

- In the **SMTP domain name** field, enter the domain name of the SMTP email system; for example yourdomain.com.
- Click the **Test connection** button.

If the test fails, check that:

- The Zetafax SMTP server has been installed.
- The **SMTP Mail path** entered above is correct.
- The Zetafax SMTP server service has been started - if necessary restart the operating system.
- Click the **OK** button.

The **Email gateway** configuration dialog reappears.



## Configuring the Zetafax email gateway rendering options for SMTP

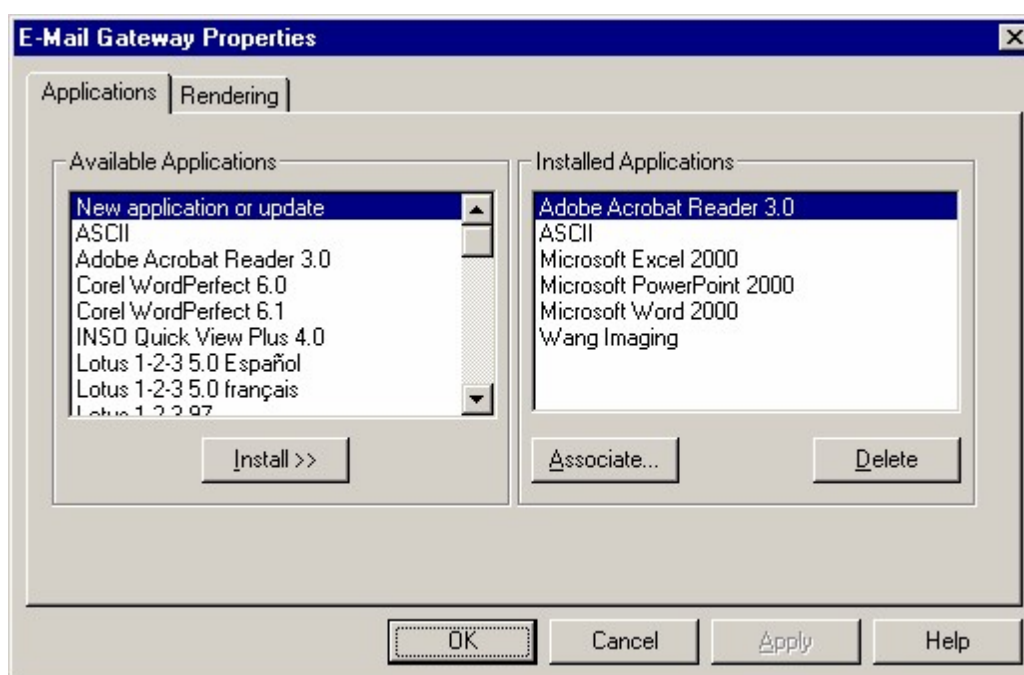
You now need to configure the rendering options for the email gateway.

- In the **Email gateway** configuration dialog, click the **Rendering.** button.

The **Email Gateway Properties** dialog provides two panels of settings: **Applications** and **Rendering**.

### Applications tab

The options on this tab allow you to register the applications you have installed on the Zetafax Server PC with the gateway. Typically, these are the most common applications used by your network users to send faxes:



If a network user attempts to send an email message with an attachment created by an application which has not been registered or installed on the Zetafax Server PC, the email gateway will be unable to process the message.

You will not be allowed to register an application from this dialog unless it has already been installed on the Zetafax Server PC. You should check that any rendering application you configure can be run without any dialogs being invoked or errors displayed on start up or shut down.

**Note:** Within this dialog, numerous versions of the same program are listed. It is important that the version of each application you specify exactly matches the version you are using on the Zetafax Server PC.

If users on your network are using multiple versions of the same applications, such as Office 2003, or Office 2010, you should install the latest version of the software on the Zetafax Server PC to generally ensure backwards compatibility.

You must install the **ASCII** driver as an absolute minimum. This is the driver which converts the text of the email message itself.

### Rendering tab

This allows you to select the quality of rendering you require.

You must click on this tab the first time to install the gateway's rendering printer driver. The email rendering subsystem printer driver will then become visible the next time you start the Print Manager.

The printer driver will not be installed successfully under Windows XP Professional, Windows 2003 unless the user account which you are currently using has administrator privileges.

When you have configured the **Applications** and **Rendering** settings:

- Click the **OK** button.

The **Email gateway** configuration dialog reappears.





## Configuring Zetafax users to use the email gateway for SMTP

Each SMTP email user who wishes to use Zetafax can have their own individual Zetafax user account. Alternatively, they can use a shared account, called an email user profile account. A single user profile account can be used for submitting faxes to the Zetafax Server on behalf of numerous email accounts. This section describes the purpose of both types of account and includes full instructions on configuring Email Gateway users.

Zetafax supports a range of SMTP servers; unfortunately there is no common way to automatically import lists of email users from these email servers.

To individually enable these users just type in the email address of the user in the **Email user name** field on the **Zetafax User Details** page. Alternatively to bulk enable these users, follow the instructions below:

- Export the list of email addresses from the SMTP server.

Consult your email server documentation for information on how to obtain this list.

- Using Notepad or another suitable text editor, format each entry as follows:

First name, Last name, email address

For example:

Jim, Jones, jjones@domain.com  
Brian, Bull, bbull@domain.com  
Sam, Smith, ssmith@domain.com

- Save the file as IMPORT.TXT.
- Launch the **Zetafax Configuration** program (ZFSETUP.EXE) and navigate to **Users and user groups**.
- Select **Email gateway users** and click the **Refresh** button.
- Click the ... browse button and select the file IMPORT.TXT saved earlier.
- In the **Import Domain Name** field, enter the email domain for your SMTP server services, e.g. yourdomain.com, and click the **OK** button.

The imported users will now appear in the right pane of the **Email gateway users** list with an SMTP prefix.

The import process will also create three wildcard entries; these are described in the [Auto enrollment](#) topic.

You now need to configure users that may use the email gateway. Each SMTP user can either use their own [individual Zetafax account](#) or they can share an account called a '[mail user profile](#)' account.

### Related topics

[Private accounts](#)

[Email profile accounts](#)

[Auto enrollment](#)

[Sending a test message via the Zetafax SMTP server](#)



## Private accounts

- Select one or more imported users in the right pane.
- Click with the right mouse button and choose **Enable** from the pop-up menu.
- In the **Enable Email Users** dialog, select **Private accounts** and click the **OK** button.
- In the **Email Account Name Generation** dialog, select the preferred **Alias name generation** option and click the **OK** button.

If you selected several users, they will now be enabled. If you selected a single user, the **Zetafax user details** dialog shows additional options for the user.

- Click the **OK** button to confirm the details.

The enabled users will now appear in the right pane of the **Email gateway users** list with their private account as the Zetafax user name.

### Alias name generation

You can create alias names for your users based on their first, second and last names, using the conventions below:

Alias Convention	Code to be used	Example	Notes
Initial of First name and full last name	%1First%Last	SSmith	
Full first name, first letter of last name	%First%1Last	SamS	
Initial of First name, Initial of second name and full last name	%1First%1Second%Last	SESmith	
Full name	%First%Second%Last	SamEdwardSmith	Care should be taken that Alias' using this convention are not too long.
First name and last name	%First%Last	SamSmith	Care should be taken that Alias' using this convention are not too long.
Initials	%1First%1Second%1Last	SES	Care should be taken that duplicate users are not created

### Related topic

[Setting up email gateway users](#)



## Email profile accounts - SMTP

Email profile accounts allow a number of SMTP users to share a Zetafax account. As a result, fax reporting will identify all faxes sent by SMTP users as from this profile, rather than from individual users.

### To configure this option

- Select one or more imported users in the right pane.
- Click with the right mouse button and choose **Enable** from the pop-up menu.
- In the **Enable Email Users** dialog, select **Single shared account** and click the **OK** button.
- In the **Choose email user profile account to use** dialog, leave **(new)** selected and click **OK**. In the **Add new Zetafax email user profile** dialog, enter **SMTP** and click **OK**. In the **Zetafax user details** dialog, click **OK**.

The enabled users will now appear in the right pane of the **Email gateway users** list with the email user profile account as their Zetafax name.

You can use email user profiles to group users into manageable units with identical user defaults.

### Related topics

[Email profile accounts](#)

[Email user profiles](#)



## Auto enrollment

You may prefer to use the auto enrollment feature provided by the wildcard entries created during the user import. This option does not allow the administrator precise control over who will use the gateway, as each SMTP user sending a fax from an enabled domain will be auto enrolled and tallied by Zetafax until the licensed number of users is reached. At this point any further users you may need to use the gateway will be rejected.

The following table gives examples of the options:

### To enable

Any user from yourdomain.com

Any user from any domain

Any user from sub-domain of yourdomain.com

### Wildcard to be used

SMTP:<\*@yourdomain.com>

SMTP:<\*@\*>

SMTP:<\*@\*.yourdomain.com>

- Click the appropriate wildcard entry in the right pane of the **Email gateway users** list with the right mouse button and choose **Enable** from the pop-up menu.

In the **Enable Email Users** dialog, **Single shared** account will be the only option.

- Click the **OK** button to proceed:
- In the **Add new Zetafax email user profile** dialog, enter **SMTP** and click **OK**:
- In the **Zetafax user details** dialog, click **OK**:

The image shows the 'Zetafax User Details' dialog box. It contains the following fields and controls:

- Zetafax user name:** Administ
- Network login id:** Administrator
- Full name:** Administrator
- Member of group:** (none) with a dropdown arrow and a 'Routing...' button.
- ☐ Allow sending from email gateway
- ☐ Include faxes sent by Zetafax client in Outlook Zetafax Outbox - Exch 5.5 only
- ☐ Forward received messages via email
- Email user name:** (empty field) with a 'Test' button.
- Buttons at the bottom: Send time..., Dial allowed..., Permissions..., Printing..., Reset, Help, OK, and Cancel.

The enabled wildcard entry will now appear in the right pane of the **Email gateway users** list with the email user profile account as its Zetafax name.



## Sending a test message via the Zetafax SMTP server

### To send a test message via the Zetafax SMTP server

- Launch your email client program.
- Create a new message.
- In the **To:** field, enter a fax number followed by @fax.

For example: 01234-865213@fax



- In the **Subject** and body fields, enter some text.
- Send the message.

After a short period, you should receive a message confirming that the fax was successfully sent.



## Sending a fax message

Sending a fax message is simply a matter of sending the message by e-mail to an e-mail address consisting of the fax number, followed by @fax

1. Launch your e-mail client program.
2. Create a new message.
3. In the To: field, enter a fax number followed by @fax, for example 01234-865213@fax.
4. Complete the Subject and body fields of the message.
5. Send the message.

The message is then sent via the SMTP gateway to the server for transmission. When the fax has been transmitted, the SMTP gateway sends you an acknowledgement.

The characters allowed in the fax number are:

- the digits 0-9 for example 17701234567@fax
- the international dialling character '+', for example +1770.123.5678@fax Zetafax automatically replaces this by the configured international dialling prefix upon dialling
- Zetafax ignores period '.' and minus '-'.

### Specifying the name

When you address a fax using just the fax number as described above, the Name field on the cover sheet or letterhead will be blank. If you want to specify the text for the Name field, you use the following form of address:

Name<faxnumber@fax>

For example:

Sam Smith<123456789@fax>

In the Name position, the /, \, [, ], (, ) and ~ characters have special meaning, so you are unable to use them directly in a name. To include any one in the name you must precede it by a \ character. For example, to set the name to: Sam Smith/Sally Smythe you use for example:

Sam Smith\ /Sally Smythe<123456789@fax>

Like addresses of all forms, this may be stored in your e-mail client program's address book.

### Specifying the organization

Similarly unless you specify the Organization text, it will be blank on the cover sheet or letterhead. If you want to specify the Organization text for the Name field, you use the following form of address:

name (organization)<faxnumber@fax>

For example:

Sam Smith (Smith and Sons)<123456789@fax>

### Specifying the cover sheet or letterhead

Normally when you send a message, Zetafax will use the default configured cover sheet. If instead you meant to specify the cover sheet to be used for the message, you add a special option to the end of the message's Subject: text, such that the subject is of the form:

Subject line text /cov=cover sheet\_name

For example:

Project Outline /cov=formal

will cause the message to use the cover sheet named 'formal'.

Where Zetafax is configured to use a cover sheet by default for each message it sends but you wish to send a message without a cover sheet, you use the same option but omit the cover sheet name, for example:

Project Outline /cov=

You may specify a letterhead in a similar way:

Subject line text /let=letterhead\_name

For example:

Our meeting /let=corporate

to use the letterhead named corporate, and

Our meeting /let=

to use no letterhead instead of the default letterhead.

### Specifying send time and date

Normally your message is sent at a time that is configured for you or your user group - usually as soon as higher priority messages have been sent. You may delay the sending by specifying a send time option on the end of the Subject:

Subject line text /[option=value]

The available options are:

Option	Description
/after=yy-mm-dd	Send after the specified date
/after=hh:mm[:ss]	Send after the specified time
/off peak	Send in the off-peak period

For example:

Our meeting /let=corporate /off peak

causes the message to be sent in the off-peak period.

### Previewing

You may specify that the message be sent as a preview to you rather than to the recipient, allowing you to check it before resending it as normal. You specify a preview using an option on the end of the Subject:

Subject line text /preview

For example:

Our meeting /letter=corporate/preview

After viewing the preview, to send the message to the recipient, remove the /preview option and re-send it.



## Setting up Email Gateway users

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Each email user who wishes to use Zetafax can have their own individual Zetafax user account. Alternatively, they can use a shared account, called an email user profile account. A single user profile account can be used for submitting faxes to the Zetafax Server on behalf of numerous email accounts. This section describes the purpose of both types of account and includes full instructions on configuring Email Gateway users.

### **Related topics**

[Enabling Email users using Zetafax](#)

[Enabling Email users from your email system](#)

[Managing user accounts using Microsoft Exchange](#)

[Managing user accounts using Lotus Notes](#)

[Email profile accounts](#)

[Email Gateway settings](#)



## Enabling email users using Zetafax

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When enabling email users to have their own individual Zetafax user account, it is recommended that the Zetafax Server configuration program is used. The **Zetafax Configuration** program will generate Zetafax usernames automatically based on the email username.

- Run **Zetafax Configuration** and select **Users and user groups**.
- Select **Email Gateway users** from the submenu.

The right pane displays a list of all email users on your email system and an icon identifying which of these users are currently enabled to send faxes using Zetafax.

- Select a single user or multiple users which have not been configured to use Zetafax from the users listed and choose **Enable** (**Action** menu) button.

Zetafax will prompt you whether you wish to create a private account for this user or have them share an email profile account.

- Choose **Private accounts** and click the **OK** button.

Configuring Zetafax users to use shared email profile accounts is described later in this section.

When you enable an email user to use a private Zetafax account, **Zetafax Configuration** will automatically generate a Zetafax user name and complete the email user's network login account.

To help Zetafax generate this information automatically, you will be prompted to provide information regarding the format of network login accounts used on your network.

- Select the convention used on your network from the examples listed; e.g. **First initial and last name (JSmith)**, or specify a custom format.

Zetafax will display the **User details** dialog for the user account you have just created.

You can specify any special permissions for this user using the options on this screen. Before you leave this dialog:

- Ensure that the **Network login ID** and **Full name** fields have been completed and are correct.





## Email profile accounts

Email profile accounts allow a number of email users to share a Zetafax account for sending and receiving faxes through the email gateway. This section describes the process of creating an email user profile account and enabling email users using **Zetafax Configuration**.

- Choose the **Users and user groups** option from the **Zetafax Configuration** main menu.
- Choose **Email user profiles options** in the left pane.
- Click **Add** (**Action** menu) to create a new email profile account.
- In the **Add new Zetafax email user profile** dialog enter the name of the email user profile account you wish to add and click the **OK** button.

You will then be able to set the required permissions for this email user profile.

You can use email user profiles to group users into manageable units, with identical user defaults specified by the network administrator.

For example, you could create fax cover sheets and letterheads for use by a specific department, or restrict a group of users to sending faxes through the email gateway during off-peak hours only.

In addition, a email user profile account can be used by the network administrator to manage the queue of faxes for users of the profile; for example to abort incorrectly addressed faxes, or rush specific faxes to the front of the queue.

### Related topics

[Setting up Email Gateway users](#)

[Email profile accounts - SMTP](#)

[Add new Zetafax email user profile](#)



## Enabling email users from your email system

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Having created an [email user profile account](#), you can now enable email users to use the Zetafax email gateway. This section describes the process of enabling email user accounts using **Zetafax Configuration**.

It is also possible to enable email users to use the Zetafax gateway using the Microsoft Exchange administrator program or the Lotus Notes public address book. See [Managing user accounts using Microsoft Exchange](#) and [Managing user accounts using Lotus Notes](#) for more information.

- Choose the **Users and user groups** option from the left pane of **Zetafax Configuration**.
- Choose **Email gateway users** from the submenu.

The right pane displays a list of all email users on your email system and an icon identifying which of these users are currently enabled to send faxes using Zetafax.

- Select a single user or multiple users which have not been configured to use Zetafax from the users listed and choose **Enable** (**Action** menu).

You will be prompted whether you wish to enable this user using an email user profile account or using a private Zetafax account:

- Select **Single shared account** and click **OK**.

You will then be prompted to choose an email user profile account, or create a new one:

- Choose the email profile account you created earlier and click **OK** to enable the user.

### Related topics

[Managing user accounts using Microsoft Exchange](#)  
[Managing user accounts using Lotus Notes](#)



## Managing user accounts using Microsoft Exchange 2010

Having created at least one email user profile account you can use the Microsoft Exchange administrator program to manage email accounts that are enabled to use Zetafax.

It is recommended that where shared email user profile accounts are used, the Active Directory Users and Computers option is used to manage whether email accounts are enabled to use Zetafax. Conversely, it is recommended that **Zetafax Configuration** is used to manage installations where private accounts are used.

When you add a new mailbox using the Microsoft Exchange Administrator program, the mailbox inherits the default values, giving responsibility for all configuration tasks to the **Zetafax Configuration program**.

If you have already created a Zetafax email profile account and want every Microsoft Exchange Inbox to use this account to send and receive faxes, please enable the **(All Exchange Users)** email gateway user from the **Zetafax Configuration Program**.

Each new mailbox you create will then be enabled to send faxes using their email client.

If you do not want email users to be enabled to send faxes using Zetafax, ensure that the **(All Exchange Users)** email gateway user is disabled.

You can enable mailboxes to use Zetafax individually using the procedure described below.

### Zetafax options

When you add a new mailbox using the Microsoft Exchange Administrator program, the mailbox inherits the default values, giving responsibility for all configuration tasks to the **Zetafax Configuration program**. You can change the Zetafax options for each user by changing the properties of their mailbox.

- Launch the Active Directory Users and Computers program and highlight the user you wish to configure.
- Click **Properties** of the user and select the **Zetafax options** tab.

You can configure whether users are to have received faxes routed to their email Inboxes using the **Receiving** section.

- Select **Enabled to receive faxes with direct dial (DID) number** and specify the inward routing code.

The routing of inbound faxes using DID requires additional configuration on the Zetafax Server. See the Automatic inward routing topics for further details on configuring DID routing.



## Managing user accounts using Microsoft Exchange 2007

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Having created at least one email user profile account you can use the Microsoft Exchange administrator program to manage email accounts that are enabled to use Zetafax.

It is recommended that where shared email user profile accounts are used, the Active Directory Users and Computers option is used to manage whether email accounts are enabled to use Zetafax. Conversely, it is recommended that **Zetafax Configuration** is used to manage installations where private accounts are used.

When you add a new mailbox using the Microsoft Exchange Administrator program, the mailbox inherits the default values, giving responsibility for all configuration tasks to the **Zetafax Configuration program**.

If you have already created a Zetafax email profile account and want every Microsoft Exchange Inbox to use this account to send and receive faxes, please enable the **(All Exchange Users)** email gateway user from the **Zetafax Configuration Program**.

Each new mailbox you create will then be enabled to send faxes using their email client.

If you do not want email users to be enabled to send faxes using Zetafax, ensure that the **(All Exchange Users)** email gateway user is disabled.

You can enable mailboxes to use Zetafax individually using the procedure described below.

### Zetafax options

When you add a new mailbox using the Microsoft Exchange Administrator program, the mailbox inherits the default values, giving responsibility for all configuration tasks to the **Zetafax Configuration program**. You can change the Zetafax options for each user by changing the properties of their mailbox.

- Launch the Active Directory Users and Computers program and highlight the user you wish to configure.
- Click **Properties** of the user and select the **Zetafax options** tab.

You can configure whether users are to have received faxes routed to their email Inboxes using the **Receiving** section.

- Select **Enabled to receive faxes with direct dial (DID) number** and specify the inward routing code.

The routing of inbound faxes using DID requires additional configuration on the Zetafax Server. See the Automatic inward routing topics for further details on configuring DID routing.



## Managing user accounts using Microsoft Exchange 2003

Having created at least one email user profile account you can use the Microsoft Exchange administrator program to manage email accounts that are enabled to use Zetafax.

It is recommended that where shared email user profile accounts are used, the Active Directory Users and Computers option is used to manage whether email accounts are enabled to use Zetafax. Conversely, it is recommended that **Zetafax Configuration** is used to manage installations where private accounts are used.

When you add a new mailbox using the Microsoft Exchange Administrator program, the mailbox inherits the default values, giving responsibility for all configuration tasks to the **Zetafax Configuration program**.

If you have already created a Zetafax email profile account and want every Microsoft Exchange Inbox to use this account to send and receive faxes, please enable the **(All Exchange Users)** email gateway user from the **Zetafax Configuration Program**.

Each new mailbox you create will then be enabled to send faxes using their email client.

If you do not want email users to be enabled to send faxes using Zetafax, ensure that the **(All Exchange Users)** email gateway user is disabled.

You can enable mailboxes to use Zetafax individually using the procedure described below.

### Zetafax options

When you add a new mailbox using the Microsoft Exchange Administrator program, the mailbox inherits the default values, giving responsibility for all configuration tasks to the **Zetafax Configuration program**. You can change the Zetafax options for each user by changing the properties of their mailbox.

- Launch the Active Directory Users and Computers program and highlight the user you wish to configure.
- Click **Properties** of the user and select the **Zetafax options** tab.

You can configure whether users are to have received faxes routed to their email Inboxes using the **Receiving** section.

- Select **Enabled to receive faxes with direct dial (DID) number** and specify the inward routing code.

The routing of inbound faxes using DID requires additional configuration on the Zetafax Server. See the Automatic inward routing topics for further details on configuring DID routing.



## Managing user accounts using Lotus Notes

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Having created at least one email user profile account you can use the Lotus Notes public address book, NAMES.NSF to manage email accounts that are enabled to use Zetafax.

It is recommended that where shared email user profile accounts are used, the Lotus Notes public address book, NAMES.NSF is used to manage whether email accounts are enabled to use Zetafax. Conversely, it is recommended that **Zetafax Configuration** is used to manage installations where private accounts are used.

### Configuring defaults

The **Zetafax Default Options** setting is used to specify the database defaults for the Zetafax options for all notes users. When you add a new person, they inherit the default values specified in this setting.

- Open the Notes server address book, **NAMES.NSF** on the Notes administrators workspace.
- Select the **Zetafax** view and select **Default Options**.
- Select **Outgoing Fax**.

If you have already created a Zetafax email profile account and want every Lotus Notes user to use this account to send and receive faxes:

- Select **Allowed to send**.

You must then select an email profile account by clicking the selector arrows in the **Default Zetafax Options** screen. Using this option, you need not use **Zetafax Configuration** to manage Zetafax accounts. Each new person you create will be enabled to send faxes using their Notes client.

If you intend to create a separate Zetafax account for each Notes user:

- Select **Managed in Zetafax**.

For each new Notes user, you must create a private Zetafax account using the ZFSETUP program.

If you do not want every Notes user to be enabled to send faxes using Zetafax:

- Select **Not allowed to send**.

Finally, from within the **Default Zetafax Options** screen, you can select a default cover sheet and letterhead for each new user. If these lists are empty you will be prompted to start the Zetafax Server to pass the Profile, cover sheet and Letterhead list to the Mail router mailbox you created earlier.

### Zetafax options

When you add a new Notes user, the person will inherit the default values specified for the site. You can change the Zetafax options for each user by changing the properties of their account.

- Open the Notes server address book, NAMES.NSF on the Notes administrators workspace.
- Select the **Zetafax** view and select **People**.

You can configure whether users are to have received faxes routed to their Notes Inboxes using the **Incoming fax** section:

- Select **Allowed to receive** and specify their inward routing code.

The routing of inbound faxes using DID requires additional configuration on the Zetafax Server. See the [Automatic inward routing](#) topics for further details on configuring DID routing.



## Zetafax Options for Exchange 2007

All Zetafax Setup is performed within the **Zetafax Configuration program** for Microsoft Exchange 2007 in the **Microsoft Exchange Setup Service** dialog in **Email Gateway Configuration**. The setup dialog is used to specify which Zetafax enabled Exchange Server to associate with the Zetafax Server, and also allows selection of message options.

### Driver enabled.

This option enables or disables the Microsoft Exchange portion of the email gateway.

### Exchange Server Selection.

Select a Zetafax enabled Exchange server from the drop down box. This is the Exchange server that your Zetafax Server will communicate with to send and receive faxes. Click the **Test Connection** button to check the connectivity with the chosen Exchange server.

### Return sent files after transmission.

Use this option to include the sent fax message in the email confirmation given to a user when a fax has been successfully sent..

### Default coversheet.

Specifies the default coversheet to be used.

The Zetafax extensions for Outlook allow the coversheet to be selected by the user directly. This setting is then only used as the default when Outlook (or the Exchange client) is first run.

If the Zetafax extensions have not been installed on a given client computer, this setting can be used to select a coversheet in conjunction with the 'Always use default coversheet' option.

This setting will also be used if the 'Always use default coversheet' option is selected.

The list shows all cover sheets configured on the Zetafax Server – it is updated automatically by the Zetafax Connector.

### Always use default coversheet.

Use this option to force all faxes sent from this site to use the default coversheet. Users will not have the option to select coversheet using the Zetafax extensions for Outlook.

### Omit coversheet if no text.

Use this option to force any faxes with no text in the body of the fax message to omit the coversheet and only send the attached files.



## Zetafax Messaging Site Options for Exchange 2003

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The Zetafax Options page in the Site Properties dialog is used to specify the default sending options for each mailbox for this site. Changing the settings on this dialog will affect any existing mailboxes that are configured to use the site default settings.

### **Managed by Zetafax configuration program (for private Zetafax accounts)**

Select this option if by default users are to use a private (personal) Zetafax account to send faxes submitted via e-mail.

Private accounts allow the user to run the Zetafax Client program to check the status of faxes that they have submitted. Faxes submitted by private accounts can also be tracked back to an individual user in the Zetafax Server logs. These accounts are created and managed individually using the Zetafax Configuration program on the Zetafax Server computer.

### **Not allowed to send**

Select this option if by default you do not wish users to be enabled to use the Zetafax e-mail gateway. Any faxes that the user submits via e-mail will be rejected. You will then only need to configure the remaining few users with the [user default Zetafax options page](#)

### **Allowed to send, using shared Zetafax mail profile account.**

Select this option if by default you wish users to send faxes via a shared Zetafax mail profile account. Mail profile accounts are special Zetafax user accounts which can be used by more than one e-mail user. You can either use one mail profile account for all users, or create a number of accounts (e.g. one per department).

You create mail profile accounts using the Zetafax Configuration program on the Zetafax Server. They are simpler to manage than private Zetafax accounts, since you do not need to make any further changes on the Zetafax Server when adding or removing users. However, users with mail profile accounts are not able to use the Zetafax Client program to monitor their faxes.

### **Zetafax account**

This is the default Zetafax mail profile account that users will use to submit faxes to the Zetafax Server. The list shows all mail profile accounts configured on the Zetafax Server – it is updated automatically by the Zetafax connector, or explicitly by choosing 'Update lists now' on this dialog.

### **Do not print sent faxes.**

Select this option to ensure that sent faxes are not printed by default. If the option is not selected, the Zetafax Server uses the default printing options for the Zetafax account.

### **Use Outlook forms for sent and received faxes (recommended)**

Select this option to enable extra functionality for Microsoft's Outlook email client. Emails will be sent using Outlook forms, and the Outlook Fax Outbox will be created and updated for each user. Uncheck this box if most mailboxes are accessed with an email client other than Outlook, or if the Zetafax Outlook Extensions are not installed.

### **Default cover sheet**

Specifies the default cover sheet to be used.

The Zetafax extensions for Outlook allow the cover sheet to be selected by the user directly. This setting is then only used as the default when Outlook (or the Exchange client) is first run.

If the Zetafax extensions have not been installed on a given client computer, this setting will be used to select a cover sheet. This setting will also be used if the 'Always use default cover sheet and letterhead' option is selected.

The list shows all cover sheets configured on the Zetafax Server – it is updated automatically by the Zetafax Connector, or explicitly by choosing 'Update lists now' on this dialog.

### **Default letterhead**

Specifies the default letterhead to be used.

The Zetafax extensions for Outlook allow the letterhead to be selected by the user directly. This setting is



then only used as the default when Outlook (or the Exchange client) is first run.

This setting **is not** used as a default if the Zetafax extensions have not been installed on a given client computer - the default is then for no letterhead to be used. However, this setting will be used if the 'Always use default cover sheet and letterhead' option is selected.

The list shows all letterheads configured on the Zetafax Server – it is updated automatically by the Zetafax Connector, or explicitly by choosing 'Update lists now' on this dialog.

### Always use default cover sheet and letterhead

Use this option to force all faxes sent from this site to use the default cover sheet and letterhead. Users will not have the option to select cover sheet or letterhead using the Zetafax extensions for Outlook.

### Advanced settings...

This button configures the rendering of email body text:

#### Allow Rich Text Format (RTF)

Check this box to allow email message bodies to be rendered as RTF in faxes. If this option is not selected all email message bodies from all users will be rendered as plain text.

#### Default message body format

This setting determines the default message body format in Outlook Zetafax properties. 'Optimized' means that the Zetafax Server will check if there is any RTF formatting in the message (such as bold or italic) and render as RTF if there is formatting, or as plain text if there isn't. 'Rich Text Format' messages are always rendered as RTF and 'Text only' messages are always rendered as plain text. This default setting can be overridden by users with the Zetafax extensions for Outlook.

### Update lists from the Zetafax connector on this server

The box lists all the servers in the Exchange organization that have a Zetafax connector installed. Select the connector that you wish to provide the cover sheet, letterhead and mail user profile lists. For most installations there will only be one connector installed.

If there is more than one connector, choose the one that will handle FAX messages from this Exchange Site. If your Exchange routing is configured so that a fax from a given mailbox could be routed to a number of different connectors, make sure that the Zetafax Servers all have the same cover sheets, letterheads and mail profile accounts configured. Failure to do this will lead to inconsistencies between cover sheets specified in fax messages and those supported by the Zetafax Server.

### Update lists automatically

Check this box to allow the Zetafax connector to automatically update lists of cover sheets, letterheads and mail user profile accounts as necessary.

### Update lists now

Use this button to update the lists of cover sheets, letterheads and Zetafax mail profiles (not necessary if 'Update lists automatically' is selected.)

### Add recipient containers

When the Zetafax Connector is installed, the Zetafax Options page is added to all existing recipient containers, and will appear on any existing or new mailboxes in those containers.

Use this option if you have created new recipient containers after installing the Zetafax connector, to add the Zetafax Options page to those containers.



## Zetafax Mailbox Options for Exchange 2007

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The Zetafax Options page in the Mailbox Properties dialog is used to specify the fax options for each individual mailbox. When a new mailbox is created, the mailbox inherits the [default values set at site level](#) – these can then be modified using this page.

### Use site defaults

Select this option to use the default properties for the Exchange site. This is the default setting for new mailboxes. If the site defaults properties are changed at a later date the settings for all mailboxes configured to use site defaults will be updated automatically.

### Managed by Zetafax configuration program (for private Zetafax accounts)

Select this option if this user is to use a private (personal) Zetafax account to send faxes submitted via e-mail.

Private accounts allow the user to run the Zetafax Client program to check the status of faxes that they have submitted. Faxes submitted by private accounts can also be tracked back to an individual user in the Zetafax Server logs. These accounts are created and managed individually using the Zetafax Configuration program on the Zetafax Server computer.

### Not allowed to send

Select this option if you do not wish the user to be enabled to use the Zetafax e-mail gateway. Any faxes that the user submits via e-mail will be rejected.

### Allowed to send, using shared Zetafax mail profile account.

Select this option if you wish users to send faxes via a shared Zetafax mail profile account. Mail profile accounts are special Zetafax user accounts which can be used by more than one e-mail user. You can either use one mail profile account for all users, or create a number of accounts (e.g. one per department).

You create mail profile accounts using the Zetafax Configuration program on the Zetafax Server. They are simpler to manage than private Zetafax accounts, since you do not need to make any further changes on the Zetafax Server when adding or removing users. However, users with mail profile accounts are not able to use the Zetafax Client program to monitor their faxes.

### Zetafax account

This is the Zetafax mail profile account that this recipient will use to submit faxes to the Zetafax Server. The list shows all mail profile accounts configured on the Zetafax Server – it is updated automatically by the Zetafax connector, or from the Site Properties dialog by choosing 'Update lists now' on the Zetafax Options page.

### Do not print sent faxes.

Select this option to ensure that sent faxes are not printed. If the option is not selected, the Zetafax Server uses the default printing options for the Zetafax account.

### Use Outlook forms for sent and received faxes (recommended)

Select this option to enable extra functionality for Microsoft's Outlook email client. Emails will be sent using Outlook forms, and the Outlook Fax Outbox will be created and updated. Uncheck this box if the mailbox is accessed with an email client other than Outlook, or if the Zetafax extensions for Outlook are not installed.

### Managed by Zetafax configuration program

Select this option if you do not want this user to receive faxes, or if you want to use the Zetafax Configuration program to manage incoming fax routing (direct dial numbers etc)..

### Allowed to receive faxes with direct dial (DID) number

Select this option to specify the user's direct dial fax number directly within Exchange..

**DID number**

Used to specify the recipient's direct dial (DID) fax number. Usually only the last few digits of the number are specified – see the Zetafax Server Software Guide for further information.

**Do not print received faxes.**

Select this option to ensure that received faxes are not printed. If the option is not selected, the Zetafax Server uses the default printing options for the Zetafax account for this user.



## Document Rendering

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In order to be sent as a fax, a document, email, or submit file must be converted into a TIFF image compatible with one of the Group 3 Faxing standards. This process is referred to as rendering.

There are two areas where rendering may occur:

- **Client-side rendering:** this covers methods which perform the conversion on the client machine. All client-side rendering involves the use of printers.
- **Server-side rendering:** this covers methods which perform the conversion on the Zetafax Server. This includes methods based on the Mail Rendering Subsystem printer and the document conversion add-on (DOCTIFF).

This guide describes all the rendering methods available in Zetafax, and concludes with a table summarizing the features they offer.

### More information

#### Client-side rendering

All client-side rendering methods use printers to convert the fax into a file format the Zetafax Server can handle. To render a document on the client, you print it to one of the following printers:

- **Zetafax Printer.** This printer is available on all operating systems except NT4 Terminal Server. It performs the following tasks:
  - Converts files directly to G3F (Group 3 TIFF format)
  - Processes embedded addressing information
  - Can open the Zetafax Client and trigger the Addressing dialog
- **Epson LQ-1000.** This printer driver, which ships with Windows, can be used to render documents on the client side when neither Zetafax printer is available. It creates an Epson format file which the Zetafax Server can render natively. It does not interact with the Zetafax Client at all. See the More Information section for information on how to configure this printer for use with the API.

#### Server-side rendering

Depending on which process is used to submit faxes to the Zetafax Server, one or more of the following rendering methods may be used. You can identify which component was used to render a document by inspecting the Zetafax Server's monitor or SERVER.LOG file.

- **Zetafax Server (EPSTIFF).** The EPSTIFF module in the Zetafax Server can render these file types to Group 3 compatible TIFF format:
  - Plain text
  - Epson spool file format
  - Graphics file formats (JPEG, BMP, PCX, WPG, ICO, DCX, TARGA, GIF, non-G3F TIFF)
- **Email Gateway (STOLE).** The email gateway includes its own rendering mechanism. Rendering is handled by a process called STOLE, which opens the document to be rendered in its native application, prints it to the Mail Rendering Subsystem printer, and then submits the resulting TIFF file to the Zetafax Server. The email gateway can render the following formats:
  - Microsoft Office documents
  - Adobe Acrobat

**Note:** The Email Gateway can only render documents submitted via email, and the application to render must be installed on the Zetafax Server. As a general rule, this process yields the best results, but it is not suitable for very high volumes.

- **Document rendering (DOCTIFF/PDF native rendering).**

Zetafax 2012 comes with a limited functionality version of the DOCTIFF add-on which is only available for those using the email gateway and has been restricted to only operate at a maximum speed of 20 seconds per page. If you do not have the add-on license and send a file using the client and not the gateway, it will not be rendered by the limited DOCTIFF.

DOCTIFF can handle over 250 file formats without needing the source applications to be installed on the machine. To gain a full speed version of DOCTIFF an add-on license would need to be purchased.

With Zetafax version 2007 or higher, PDF documents can be rendered in two different ways: high-quality native PDF rendering or legacy PDF rendering which is used with older versions of Zetafax. The default option is the high-quality native PDF rendering.

It is available to all areas of Zetafax which require server-side rendering, including the Email Gateway, COM or C-language API, ZSUBMIT and the Web Client. This method will produce an approximation of the original document, but is most suitable for high volumes of faxing.

Note: Documents submitted via the Email Gateway can be rendered by any of the above methods. The method chosen by the Zetafax Server will depend on the following process:

1. The Zetafax Server checks if the Email Gateway is configured to render the submitted file type. If so, the file will be rendered using the Mail Rendering Subsystem.
2. If the Email Gateway is not configured to handle the file type, it will start the DOCTIFF/PDF rendering process and attempt to render the file that way.
3. If the rendering add-on is not able to handle the file type because it is excluded or not supported, the Zetafax Server will render the file using its own EPSTIFF module.

The API and Web Client can only use DOCTIFF/PDF rendering or EPSTIFF. If DOCTIFF/PDF rendering is not able to render the document, EPSTIFF will attempt to render all non-graphical documents as plain text.

The following table summarizes the different rendering methods. API in this context refers to the COM or C-language API, or the automated submitter (ZSUBMIT).

Method	Location	Operating Systems	Licence	Areas	Details
<b>Zetafax Printer</b>	Client	All except NT4	TS Any	Zetafax Client	Creates spool file in TIFF format
<b>Epson LQ-1000</b>	Client	All	N/A	API	Supports embedded addressing Creates spool file in Epson format
<b>Zetafax Server (Epstiff)</b>	Server	All	Any	Zetafax Server Email Gateway API Web Client	Converts text, Epson and graphics files
<b>Email Gateway (STOLE / Mail Rendering Subsystem)</b>	Server	All except XP and Terminal Servers (*)	Any	Email Gateway	Requires the presence of the document's original application (e.g. Microsoft Word) Converts 250 file types
<b>Rendering add-on (DOCTIFF/PDF rendering)</b>	Server	All except Terminal Servers (*)	Rendering add-on	Email Gateway API Web Client	

(\*) Please note that the Zetafax Server is not supported in any Terminal Server environment. The details

of the environments where each method can be used are given here for information only, and this does not imply that these are normally supported.

**References**

For Configuring rendering options select your email gateway system from the list below:

[Exchange 2007](#)

[Exchange 2003](#)

[Lotus Notes](#)

For additional help with document rendering please try the [Document Rendering Troubleshooting guide](#).



## Document Rendering Troubleshooting

When using the e-mail gateway to send faxes it is possible to send document attachments which are converted into faxes using the **Mail Rendering Subsystem** printer on the Zetafax Server system. Some times the process used to convert attachments fails. This document describes the process and details procedures to troubleshoot problems that you may be experiencing with the mail rendering subsystem.

**Note:** for the purpose of this troubleshooting area we are using a Microsoft word document (<FileName.Doc>) as an example.

The process of converting an attached file (including **Rich Text Format .RTF**) is as follows:

1. After the user sends the email containing the attachment, it passes from the email sever into the Zetafax Server application.
2. The Email is separated from the attachment which is then opened on the Zetafax Server system. When it does this it places the files temporarily into the **Zfax \Mail\ST** folder (where Zfax is the location of the Zetafax Server files).
3. Using an application that is able to view that particular file type, the attachment is printed to the Mail Rendering Subsystem printer e.g. Word is normally used to print .DOC and .RTF attachments.
4. The Mail Rendering Subsystem printer creates a **.TIFF** image of the attachment file in the **Zfax \MAIL\ST** folder.
5. Zetafax picks up the .TIFF image file and sends it as part of the final fax.

In most installations this process runs smoothly. However this document describes a process to troubleshoot rendering problems should they arise.

### What are the symptoms?

The most common symptoms of rendering issues (as opposed to, say, e-mail gateway problems) are the following:

- Sending a plain text message with no attachment works correctly.
- Messages in Rich text or HTML format, or messages with an attachment, are rejected with one of the following errors on the Zetafax Server or in the rejected message returned to your mailbox:
- "Unable to process message"
- "Internal error - invalid parameters"
- An error code number starting with 63 (e.g. 63254).

If the problem is a rendering problem, it will affect all e-mail gateway users. If only one user is affected, there may be a problem with that user's settings, with the file, or type of attachment they are sending.

### Are any messages sent successfully?

Before you troubleshoot rendering, you should ensure that the e-mail gateway is sending faxes correctly. Send a plain text e-mail as a fax (not "Rich Text" or "HTML" - see your mail client's documentation on how to do this), and verify that it is sent successfully.

If the plain text fax is not sent, then you probably have an e-mail gateway, Zetafax Server, or connector problem, which is not covered in this document. If the plain text fax is sent successfully, continue with this troubleshooting guide.

### Does rendering fail when the Zetafax Server runs as an application?

In some cases, rendering may only fail if the Zetafax Server is running as a service. If you are running Zetafax as a service, you should check whether rendering works when you run the Zetafax Server as an application:

1. Go to the **Control Panel**, and then open **Services**.
2. Highlight the **Zetafax Server service** and click on the Stop button.
3. Close the **Services** window.
4. Go to **Start**, **Programs**, **Zetafax**, and click on **Zetafax Server**.

5. The Zetafax Server screen will appear with **Zetafax Server'** in the title bar (not **Zetafax Server Monitor'** )

Test whether rendering works in this state. Please note that when Zetafax is running as an application, the rendering applications will open up on screen, which may disrupt any work you are doing on the server desktop.

If rendering works correctly with the Zetafax Server running as an application, check whether the account the service is using is causing problems:

1. Check what user account you are currently logged into Windows as.
2. Change the Zetafax Server service account to that same user, and start the service.
3. Test whether rendering now works. If it does, you either need to change the account used for the service, or you need to increase the permissions of the account the service currently uses.

**Note:** If your e-mail server is on a different machine than the Zetafax Server, the service will need to run with an account, which has access to other machines i.e. your mail server (so LocalSystem is not suitable).

### Does rendering fail for all attachments?

If a particular document fails to render, check rendering with a different document from the same application.

**Note:** Macros, small margins and non-conventional paper sizes in the document you are trying to send may stop the application from rendering correctly.

### Does rendering fail for all applications?

If you usually only send one type of attachment (for example, Microsoft Word documents), check whether other types of attachments fail as well. If only one type of attachment fails, there may be something wrong with that application's installation on the Zetafax Server.

Here are some known issues with the third-party applications Zetafax uses for rendering. If the Zetafax Server is running as a service, run it as an application to check if these problems are occurring:

- The Office Assistant or an error message appears when you open the application on the Zetafax Server. Disable the Office Assistant or troubleshoot the error message to solve the problem.
- Adobe Acrobat 4.05 has been installed on the server at some point. There was a flaw in this version of Acrobat which stopped rendering from working. Upgrading to Acrobat 5.0 does not fix this problem, because parts of 4.05 will remain intact. The solution is to install Acrobat 3.0. This problem does not affect clean installations of Acrobat 3.0, 4.0 and 5.0.
- Large Adobe Acrobat PDFs can cause problems. Use the Document conversion engine to render PDF documents. This add-on supports over 250 file extensions and is a purchasable add-on to Zetafax.

### Does printing to the Mail Rendering Subsystem printer work?

Open a document in the application that is failing, and print it to the Mail Rendering Subsystem printer. This should create a TIFF file in the *Zfax \MAIL\ST* folder.

If the Mail Rendering Subsystem printer is not available, or a TIFF image is not created when you print to it, then there is a problem with the Mail Rendering Subsystem printer. [Click here for help with the Mail Rendering Subsystem printer.](#)

### Does right-clicking on a file and selecting Fax Convert work?

If the Mail Rendering Subsystem is working correctly, then there may be a problem with the command used to print the document from the e-mail gateway.

In order to call the relevant application during rendering, the Zetafax Configuration normally adds a "verb" called Fax Convert to the enabled applications. In some cases, this verb may be incorrect or became corrupt.

To test whether this command is working:



1. Create a plain file from the application you are trying to render to a location on the Zetafax Server machine.
  2. Place the file in the *Zfax \MAIL\ST* folder, then close all applications that may still be open.
  3. Right-click on the file and select **Fax Convert** . You should see the file open, a print to an "**OEM Printer**" dialog box appear briefly (on some systems this may be too fast to notice), and then close.
  4. Check the contents of *Zfax \MAIL\ST* folder on the Zetafax Server. A new TIFF image should be in this folder. Open it and check that it is a copy of the file you printed.
- 
1. If the application doesn't open, or the file doesn't print, there may be something wrong with the Fax Convert command. You can check the contents of the Fax Convert command by checking the following:
  2. Open Windows Explorer. Go to **Tools , Folder Options...**
  3. Click on **File Types** , and then highlight the extension for the type of file you're having problems with (e.g. **.DOC Microsoft Word Document** if you're having problems with Microsoft Word). Click on **Advanced**.
  4. In the next dialog, highlight **Fax Convert** , and then click on **Edit...**
  5. Check the ensuing dialog for obvious errors, like the wrong path in the "Application to perform action".

If at this point, you are unable to fix the problem yourself, you will need to contact Technical Support for further assistance.

### Contacting Technical Support about rendering issues

Before contacting Technical Support, make sure you have run through every stage in this document. When you do contact Technical Support, you will need to provide the following items:

1. The version of the Zetafax Server, e-mail gateway, and Zetafax connector (if you are using Exchange), as well as the versions of all the applications you are rendering with. If you are using another mail server we require the version of the server, e-mail gateway and mail server as well as the applications you are rendering with.
2. The answers to all the questions asked in this document.
3. E-mail gateway trace logs covering a time where rendering failed. A server.log file covering a time where rendering failed. This can be found in *Zfax \SERVER\Z-DB* on the Zetafax Server.

This will allow the support team to better help you with your current problem.



## Email Gateway Troubleshooting

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This section is designed to address some of the most common problems people face when using the Email Gateway:

### **Incoming faxes are being passed to the email gateway but not appearing in my Outlook client.**

Is Zetafax running as a service or as an application? If you are unsure check the Zetafax Server window. Look at the top left hand corner of the window if it states **Zetafax Server'** then it will be running as an application. If it is running as a service then it will display **Zetafax Server monitor'**.

If Zetafax is running as a service then stop the service and run it as an application. If the messages are now appearing in your Inbox then you will need to check the account permissions that Zetafax is running under. The account needs to have specific rights to write/delete files in the Zetafax connector folder. This is especially important if the Zetafax Server is not on the same machine as your exchange server. Normally a domain administrator account should be used.

### **Faxes are still not coming through even when Zetafax is running as an application and the interactive user account has domain admin rights.**

Check directory `zfax \server\mailout` (where `zfax` is the location of your Zetafax installation). In this folder check to see if there are any files with a \$ extension e.g. `~MAIL080.$`. This file type is a corrupt fax.

Delete this file and restart the Zetafax Server, faxes should now start going through to the email gateway and appearing in your inbox.

### **There are no files with a \$ extension but there are build up of .sin and .ini files in the Zfax\server\mailout folder.**

Arrange these files by Date/Modified and move the oldest files out of the `zfax \server\mailout` directory to another location (e.g. into a temporary folder on the desktop).

If faxes start to go through move the files back again, however if after copying any of these files these files stop new faxes being processed then these files have been corrupted and should be deleted.

### **When I send a fax it remains in my Outbox in my outlook client.**

Check to see if the driver is enabled in Email gateway setting. This can be found in Zetafax configuration, Server setting, Mail Gateway, configure.



## Email Gateway error codes

Zetafax error codes are generally interpreted and explained by the Zetafax Client program. However, they are also stored in the fax billing log (FAX.LOG) and returned by the Zetafax API functions and e-mail gateway when listing transmission history for a given message.

The error codes are normally displayed as hexadecimal numbers (eg: F100). However, in some cases you may see an error code as a five-digit decimal number (eg: 61696). The e-mail gateway and Web Client return decimal versions of the API-specific error codes (see "API errors" below). These particular codes are listed in hexadecimal and decimal format for ease of use. The equivalent COM error is also given.

The list below gives the error codes, and a summary of their meaning. Note that the list is generally extended with new software releases, though existing codes remain unchanged.

### More information

#### General errors

F001	Invalid parameter (general)
F002	No file handles available
F003	Pathname invalid
F004	Filename invalid
F005	Run out of possible file names
F006	Can't open file (general)
F007	Can't open control file
F008	Invalid control data
F009	Can't open message file
F00a	Task was aborted by request
F00b	System shut down
F00c	General file error
F00d	Wrong format file, etc
F00e	Illegal request
F00f	Feature not supported yet
F010	Invalid message
F011	Invalid device
F012	No working devices of correct type
F013	Unable to send
F014	No space on disk
F015	Can't convert file format
F016	Error in receiving
F017	Init variable not in environment
F018	Unable to open ZETAFOX.INI
F019	Bad format ZETAFOX.INI file
F01a	Path does not exist
F01b	Error deleting file(s)
F01c	Not Tiff file
F01d	Only support normal byte order ("II") Tiff
F01e	Only support MH tiff
F01f	Only support 1 strip per page tiff
F020	Only support inches for resolution unit
F021	Only support certain extended (pointer) tags
F022	Only support lsb first
F023	Remote process not active
F024	Error with licence
F025	Missing UserArea: etc in ZETAFOX.INI
F026	Can't open SETUP.INI
F027	Can't determine format
F028	Only support 100, 200 and 400 dpi

F029	User not found in USERLIST.INI file
F02a	Can't open USERLIST
F02b	Bad USERLIST Dial: line
F02c	Bad USERLIST NetworkEdit:
F02d	Bad USERLIST SendTime:
F02e	Bad USERLIST Urgent:
F02f	Bad USERLIST Admin:
F030	No permission to send to this phone number
F031	Licence expiry date passed
F032	Bad USERLIST RushToTop:
F033	Can't requeue message
F034	Can't open ROUTING file
F035	Invalid ROUTING file
F036	No SUBADDR/SENDERID paragraph
F037	No ACCUSOFT.DLL
F038	No ACCUSOFT.DLL
F039	Bad USERLIST PrivateEdit: line
F03a	Bad USERLIST SubmitAny: line
F03b	Memory allocation failed
F03c	O/S error
F03d	Bad USERLIST GroupAdmin: line
F03e	Queueman internal use
F03f	Couldn't load mail DLL
F040	Couldn't logon to mail
F041	Couldn't logoff from mail
F042	User pressed CANCEL etc
F043	General error sending mail
F044	General error resolving name
F045	Two or more matches for recipient specified
F046	Attachment file error
F047	Recipient not found
F048	Recipient not found
F049	V5 mail upgrade is for too few users
F04a	Couldn't write to mail directory
F04b	Disk full
F04c	Insufficient memory
F04e	Invalid mail message identifier
F04f	Invalid mail session handle
F050	Too many attachments to mail message
F051	Too many recipients for mail message
F052	No message found
F053	Failed to read mail message
F054	Invalid parameters for mail function
F055	Failed to delete mail message
F056	'Abort after preview' option set on mail message
F057	Win95 can't use foreign DLL if system locale is wrong
F058	WinNT message box system font can't support foreign chars
F059	Requested folder not available or invalid
F060	Can't change 'mail type'
F061	Can't specify password for this system
F062	Can't find required DLL (mail)

#### Dialling properties errors

F070	General dialling properties error
F071	No dialling properties data retrieved
F072	Editing rules make this number too long
F073	Invalid dialling properties settings
F074	Dialling properties switched off

#### TAPI errors

F080	General TAPI error
F081	TAPI not initialized
F082	Error initializing TAPI

F083 Error with TAPI location data

#### Device specific errors

F100 Can't talk to device - permanent  
F101 Can't talk to device -in use  
F102 Should recover soon  
F103 No answer when sending  
F104 Destination ID doesn't match  
F105 Comms error sending  
F106 Comms error receiving  
F107 Serious error in communicating with the device  
F108 Device handler timeout  
F109 Server not running  
F10a Phone number engaged  
F10b Phone call not answered  
F10c No dial tone on line

#### Convert program errors

F200 Top word of all errors (convert programs only return low word)  
F201 Can't open TOOLS.INI file  
F202 ServerArea: variable missing  
F203 CTL file not found  
F204 Unrecognized destination format  
F205 cover sheet foreground file missing  
F206 Message file not found  
F207 Letterhead file missing  
F208 Can't create message files  
F209 CVT file invalid  
F20a File too large  
F20b File error with intermediate files  
F20c File write error  
F20d File read error  
F20e Letterhead or cover sheet background file invalid  
F20f CVT file not found  
F210 Unable to initialize fonts  
F211 File error with FAX header line files  
F212 Run with invalid arguments  
F213 NULL length message  
F214 Tiff message file invalid  
F215 AllUserArea not found  
F216 Init not in environment  
F217 General error  
F218 General file error  
F219 General init error  
F21a Graphics append file not found  
F21b Graphics include file not found  
F21c Graphics append file invalid  
F21d Graphics include file invalid  
F21e Control file invalid  
F21f Aborted by user  
F220 Invalid control char  
F221 Invalid escape sequence  
F222 Invalid %%[] command  
F223 Landscape buffer allocation failed

#### Address book errors

F300-F321

#### LCR and Router errors

F400 Message already listed  
F401 Message already tried and failed

F402	No message ID
F403	Too many files to process
F404	Multiple hopping not allowed
F405	Message type unrecognized
F406	Insufficient memory
F407	Expected attachment file missing
F408	Invalid data in message
F409	Remote server too busy to send in time
F40a	Link or run numbers don't match
F40b	Remote server not allowed to receive fax submissions
F40c	Failed to send message
F40d	Local link failed
F40e	Remote server not online
F40f	Receiver's run number is wrong
F410	No links to remote servers available
F411	This message can only be sent directly (locally)
F412	Message priority too high
F413	Message timed out
F414	Message rejected by remote server
F415	Send attempt failed - link now inactive
F416	Send attempt failed - link no longer exists
F417	Not allowed to send this message via local server
F418	Encryption error
F419	Link not 'Send enabled'

#### API errors

**Note:** API errors may appear in one of the following forms not only in the Zetafax Server or Zetafax Client, but also as Email Gateway error codes and Web Client IDispatch errors.

F700	63232	0x8004F700	An invalid parameter was passed to the Zetafax API
F701	63233	0x8004F701	A call was made to the API when it had not been initialized with a call to

#### ZfAPI.Logon

F702	63234	0x8004F702	The API failed to initialize
F703	63235	0x8004F703	The API had problems reading ZETAFOX.INI
F704	63236	0x8004F704	An attempt was made to log on to the API with an invalid user
F705	63237	0x8004F705	The user was already logged on or the API cannot access their directories
F706	63238	0x8004F706	The API was passed an invalid path
F707	63239	0x8004F707	There are too many files in this directory
F708	63240	0x8004F708	Too many open files
F709	63241	0x8004F709	Could not open file
F70A	63242	0x8004F70A	Could not read/write to file
F70B	63243	0x8004F70B	The file could not be found
F70C	63244	0x8004F70C	The Zetafax Server isn't running
F70D	63245	0x8004F70D	The data file format specified is not recognized
F70E	63246	0x8004F70E	The specified message could not be found
F70F	63247	0x8004F70F	An attempt was made to modify a message that wasn't completed
F710	63248	0x8004F710	This message already exists
F711	63249	0x8004F711	Could not open MSGDIR.CTL
F712	63250	0x8004F712	Error updating/accessing MSGDIR.CTL
F713	63251	0x8004F713	MSGDIR.CTL is invalid
F714	63252	0x8004F714	Error handling .SUB file
F715	63253	0x8004F715	The buffer in which to return data was too small
F716	63254	0x8004F716	One or more lines in the specified .SUB file were invalid
F717	63255	0x8004F717	Cannot read user's USER.INI
F718	63256	0x8004F718	The API was unable to open the message's CTL file.
F719	63257	0x8004F719	Error reading/writing CTL file
F71A	63258	0x8004F71A	CTL file is corrupt
F71B	63259	0x8004F71B	The Zetafax Server is running
F71C	63260	0x8004F71C	The API could not launch SYSMAN.EXE
F71D	63261	0x8004F71E	Problems accessing SETUP.INI
F71E	63262	0x8004F71F	The function failed because a user defined callback function returned "Abort and Stop" status

F71F	63263	0x8004F720	The specified function did not complete within the timeout period
F720	63264	0x8004F724	The API ran out of memory.
F721	63265	0x8004F725	The API Could not find the Zetafax licence
F722	63266	0x8004F726	Your Zetafax licence does not permit you to use the API
F723	63267	0x8004F727	The API couldn't find the user of this session
F724	63268	0x8004F728	Access Denied
F725	63269	0x8004F730	The collection is full
F726	63270	0x8004F700	An invalid parameter was passed to the Zetafax API
F727	63271	0x8004F701	A call was made to the API when it had not been initialized with a call to ZfAPI.Logon

#### Workstation error codes

F800	Cannot delete file
F801	Cannot write to or create
F802	Cannot create file
F803	Cannot rename file
F804	Cannot r/w file
F805	Cannot access file details
F806	File does not exist
F807	Control file syntax error
F808	Problem with global memory
F809	Cannot read file
F80A	Problem writing file
F80B	Bad DDE command or parameters
F80C	Failure using %%[ ] command
F80D	Library request failed
F80E	Problem with mail
F80F	INI file syntax error
F810	.LST file has invalid .INI file format
F811	Problem with ODBC DLL
F812	Problem with control file checksum
F813	Accusoft Error



## Zetafax Server

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The Zetafax Server is central to the operation of Zetafax. It controls the movement of fax messages between clients on the LAN, fax devices, printers, and other fax servers.

### **Related topics**

[Server overview](#)

[Administration utilities](#)

[cover sheets, letterheads and attachments](#)

[Automatic inward routing](#)

[Least cost routing](#)





## Zetafax Server overview

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The Zetafax Server is central to the operation of Zetafax. It controls the movement of fax messages between clients on the LAN, fax devices, printers, and other fax servers.

These topics provide an overview of the operation of the Zetafax Server and are aimed at the network administrator.

### **Related topics**

[Client/server functions](#)

[Programs on the Zetafax Server](#)

[Server queue management](#)

[Filing system and permissions](#)

[Communication with clients](#)

[Language setup](#)

[Device Management](#)



## Client/server functions

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Zetafax operates as a client/server application. The Zetafax Client allows users to create requests for processing, which are then submitted to the Zetafax Server. The Zetafax Server processes these requests, and monitors and controls the shared resources such as the fax devices and address book files.

### Requests

In general there are two types of request made by the Zetafax client. The first type require an immediate response, such as address book edits, log searches and queue status requests. These typically take little time to process at the Zetafax Server. The Zetafax Server creates a results file which is then displayed by the client. Usually the client (and therefore the user) is just waiting for the request to be completed.

The second type of request will take some time to process, being generally associated with messages being sent, printed or scanned. For these the client still creates a request file, often linked to a data file containing the message to be sent, and submits the request to the Zetafax Server. The main difference is that having submitted the request, the user may then continue with other tasks. The client uses icons to display the progress of the request on the screen by monitoring a status file containing information about all outstanding tasks for that user. It is important to realize that the processing of the request is still being performed on the server machine. The user could exit from the client program or even switch off his or her computer without affecting the final result. Similarly, a user can still monitor the progress of his or her own messages from another computer.

### Related topic

[Communication with clients](#)



## Programs on the Zetafax Server

The Zetafax Server itself is a collection of programs, all or mostly running in the background. Status and error messages from these programs are written to three different central log files. SERVER.LOG is displayed in the Zetafax Server's main window (the ZSERVER program), and is refreshed when the Zetafax Server is restarted. Daily log files named ~Zymmdd.LOG, where yymmdd is the date, include details of the user, message id, etc. for each logged message, and are used for client log search requests. Finally, a record of every fax sent is made in FAX.LOG; this may be used for accounting and auditing.

The following sections give details of the Zetafax Server programs.

### System manager

The system manager program, SYSMAN, runs the various Zetafax Server programs, using the system configuration file SETUP.INI to define the number and types of devices, and monitors the status of these programs. It stops the Zetafax Server if a problem is detected. It is also the interface between Zetafax clients and the Zetafax Server, directing requests from the clients to the appropriate server programs.

### Queue manager

The queue manager, QUEUEMAN, maintains queues of messages waiting to be processed. New messages are submitted to QUEUEMAN, which queues them, runs convert programs to generate the correct format for transmission, then submits the message to a free device for sending. QUEUEMAN handles device and transmission failures, re-queuing and re-submitting as necessary.

### Device controllers

Several device controllers manage each different type of hardware device that is connected to the system. Each device has a type and number.

PRINT performs printing to Windows compatible printers. NETWORK handles network file copies (sending on the LAN and previews). Others device controllers handle fax devices that may be connected. This includes FCLASS for Class 1, 2, and 2.0 fax modems, BTA for Brooktrout Trufax Analog (full length) fax boards and BTB for Brooktrout TRxStream fax boards (TR1034 and Trufax BRI). These programs monitor the devices for errors, and perform the tasks given to them by QUEUEMAN.

### Router

ROUTER is the Zetafax Server program that handles communication with other Zetafax Servers, either across a network (LAN or WAN) or over the Internet via email. Its most visible function is to pass fax requests to these 'remote' Zetafax Servers (as specified by the LCR rules) and to receive such requests from other Zetafax Servers and submit them to QUEUEMAN. ROUTER also keeps track of the status of all remote servers on the LCRNet and passes the information to other Zetafax Server programs.

### Convert programs

Several convert programs convert files from one format to another. EPSTIFF is the main converter, which converts Epson FX or LQ series print format files or standard TIFF files into TIFF fax format files ready for sending. It also handles merging on to letterheads and inserting mail-merge fields and graphics.

### Address books

The address book files are managed by ADDMAN. It performs searches and edits of address book entries, and performs searches of the log files when requested by a client. It is also referred to as the log search program in this help.

### Zetafax Server console

The Zetafax Server console, ZSERVER, is used to start SYSMAN and displays Zetafax Server information and error messages. It can be iconized if required. If the server is running as a service it may be stopped using a menu command or from the Control Panel.

Startup and close down both take a few seconds to complete.

**Related topic**

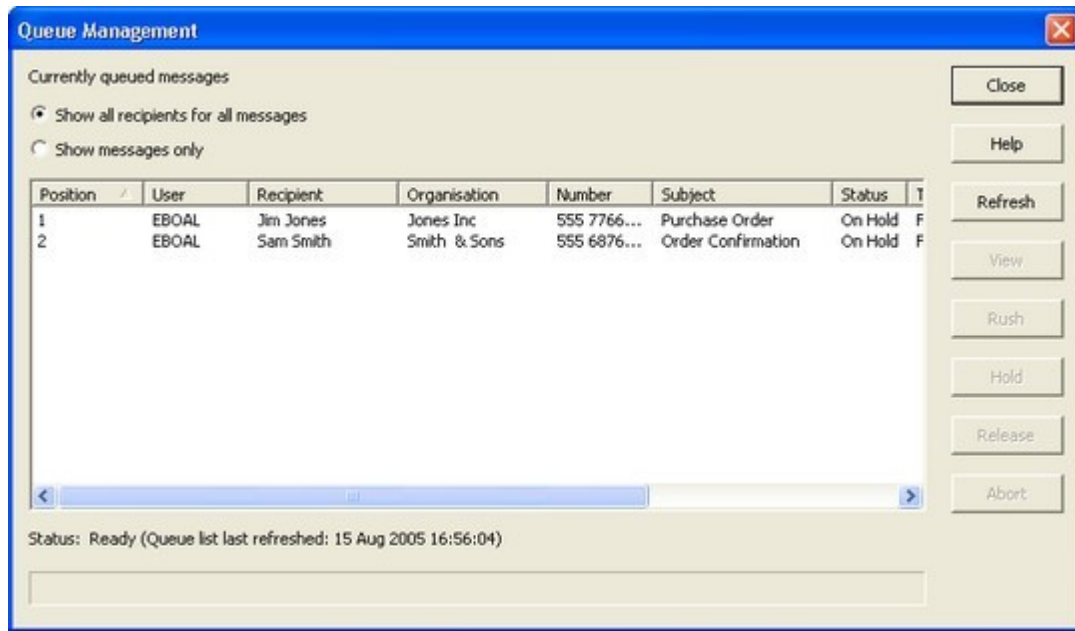
[Queuing and retry parameters](#)



## Server Queue Management

The Server Queue Management function within the Zetafax Server provides the Zetafax Administrator with a mechanism for centrally viewing and managing the message queue. Using this functionality, Administrators can Rush, Hold, Release and Abort multiple messages in the queue.

To access this functionality, select **Manage Queue...** from the **Options** menu in the Zetafax Server Monitor application or right-click on the Queue Pane and select **Manage Queue...** in the Zetafax Server Monitor application. The Server Queue Management dialog will be displayed:



Initially the dialog will appear unpopulated while message queue information is retrieved from the Zetafax Server. This may take several seconds if the queue is large. Once populated, the dialog is ready for use.

### Switching between views

The top of the dialog provides two radio buttons, allowing you to view the message queue in different modes.

**Show all recipients for all messages** – When selected, the queue list will display one row for each recipient of each message currently in the queue. So if, for example, there were three messages in the queue each addressed to two individual recipients, you would expect to see six rows in the list.

**Show messages only** – When selected, the queue list will display one row for each message currently in the queue, regardless of the number of individual recipients associated with each message.

### Sorting

By clicking on individual columns, you can sort the data in the queue list on that column. This can make it easier to find specific items of interest to you. On startup, the data is sorted by **Position**.

### Refreshing the view

To ensure efficiency during operation, the onus is on the user to refresh their view of the message queue manually. This can be done by clicking the **Refresh** button.

From start to finish, this process may take several seconds to complete. The status message at the bottom of the screen displays the date and time when the view was last refreshed. Please note that switching between views using the radio buttons described above does not poll the server to refresh queue information.

### Viewing a message

By selecting a single row from the list, the **View** button will become enabled. Clicking **View** will open the fax image in the application associated with the image type. This will normally be the Zetafax Viewer.

### Actioning messages

By selecting one or more items from the list, the **Release**, **Hold**, **Rush** and **Abort** buttons are enabled. By clicking one of these you can perform the appropriate action on the selected messages. In doing so, there are a number of factors that should be taken into consideration:

1. The selected action is performed against all recipients for all selected messages. You cannot action individual recipients without affecting the entire message.
2. The Server Queue Management functionality does not provide immediate feedback on the actions performed. To view the results of the action, you must hit the **Refresh** button. This is because some requests may not be actioned immediately if the Zetafax Server is busy.
3. Some actions cannot be performed against messages in certain states. For example, you cannot directly Rush a message that is currently on Hold (you must first Release the message). By selecting a message and hitting an action button, the appropriate request is sent to the server. The request will be dealt with in due course. To view the results of any action, you should monitor the Zetafax Server messages window. If an action cannot be performed on a selected message, you will not receive a direct warning through this dialog. This is because of the potential delay between request and response at peak times.

### Viewing progress

Some of the operations described above may take several seconds to complete. This is especially true when actioning large numbers of messages and recipients. You can gain an indication of how long a process will take by viewing the progress indicator at the bottom of the screen.



## Filing system and permissions

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Both the Zetafax clients and the Zetafax Server need to be able to access the same file space. The file space is split into five areas, depending on the access permissions required.

- The Server Area, *zfax* \SERVER, is used only by the Zetafax Server programs, and is used for private databases which should not be accessible to the clients.
- The System Area, *zfax* \SYSTEM, should be accessible to clients for reading only.
- The All User Area, *zfax* \USERS, contains a subdirectory for each user. Each user should have Full Control access to their own subtree, and No Access to the directories for other users.
- All users require Full Control access to the Request Area *zfax* \REQUEST.
- Finally, if the Zetafax email gateway option is installed the *zfax* \MAIL area is used only by the Zetafax Server programs and should not be accessible to the clients.
- In each example above *zfax* is the root Zetafax Server installation folder, e.g. C:\Program Files\Zetafax Server.

### Related topic

[Security](#)



## Communication with clients

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Most requests from the clients to the Zetafax Server are made by creating a control file in the user's own area, together with any data files which are needed. A small file is then created in the Request Area giving details of the type of the request (that is, whether it is Send, Address book, etc.), plus the username and control file name.

The clients check that the Zetafax Server is running by attempting to open a lock file ZETAFOX.LOK in the request area. This is kept open by the system manager, blocking clients from having access to the file whilst the Zetafax Server is running correctly.

### **Related topic**

[Client/server functions](#)





## Language setup

The Zetafax Server Monitor application is available in 5 languages:

English  
French  
German  
Spanish  
Italian

To change the language:

- Click on **Options**
- Select **Change Language...**
- Click on the Language you require.

The setting applies only to the Zetafax Server Monitor and does not apply to any other Zetafax application.

Please note that the Zetafax Server messages are currently only available in English.





## Device Management

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The Zetafax Server Monitor allows basic device management.

Devices on a Zetafax Server can be brought **online** or taken **offline**:

- Click on **Options**
- Click on **Manage Devices**
- Change the device status

*Or*

- Right-click on the device in the Device Pane
- Select either **Bring Device Online** or **Take Device Offline** depending on the status of the device.



## Zetafax Updates

To check whether there are any updates available for your version of Zetafax please visit our website at <http://www.equisys.com/support/ZetafaxUpdates.html>.



## Fax reporting

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The Reporting facility of the Zetafax Server allows the data stored in FAX.LOG to be presented in the form of useful reports, which can be configured to show only the data pertaining to certain users, specified time periods, or to certain destinations.

The reports are generated in a preview window. From there they can be printed or exported in a variety of formats.

### Report On

This box allows you to choose between sent and received fax reports.

### Fax log file

This box allows you to choose from different log files. The Zetafax Server always writes to ..\SERVER\Z-DB\FAX.LOG for sent faxes and ..\SERVER\Z-DB\FAXIN.LOG for received faxes. If you have renamed or moved either of these files, you can specify it here.

### Browse (...) button

This brings up a standard 'Open File' dialog so that you can find a FAX.LOG file elsewhere on the system.

### Report Type

There are a number of basic report types:

- Sent Faxes - Average usage per hour, Average usage per weekday, Detailed, International, Standard, Summary.
- Received Faxes - Average usage per hour, Average usage per weekday, Detailed, Device, Standard, Summary.

Choose the one that best suits your needs using the drop down list.

### Report Subtype

The data in each report can be grouped in different ways. This list lets you choose the data to focus on in the report.

### Date Checkbox

If this is checked, the report will only contain data in the date range indicated by the date pickers.

### From and To Date Pickers

These allow you to specify the date range of interest. Note that you cannot set the 'To' date to a value less than the 'From' date.

### Time Checkbox

If this is checked, the report will only contain data in the time range indicated by the time pickers.

### From and To Time Pickers

These allow you to specify the time range of interest. Note that if the 'From' and 'To' dates are identical, you cannot set the 'To' time to a value less than the 'From' time.

### No Filtering

All the data within the date and time range will be included in the report.

### Specify Data

Allows you to focus on a particular set of data, and ignore any that do not match your selection.

### Field

Choose the category of data to filter. Choices are Users, Recipients, Countries, Charge Codes or Remote Servers for sent fax reports or Users, Senders or Countries for received fax reports.

### Value

Give the value(s) of the data that you wish to report on.

### Print Setup

Allows you to change the printer on which the report will be printed.



## How do I create a Fax report?

The reporting facility of the Zetafax Server allows the data stored in FAX.LOG or FAXIN.LOG to be presented in the form of useful reports, which can be configured to show only the data pertaining to certain users, specified time periods, or to certain destinations.

To run a fax report do the following:

1. Open the Zetafax Server interface.
2. From the **Options** menu select **Fax Report...**

The **Fax Report** dialog will now open:

The screenshot shows the 'Fax Report' dialog box with the following settings:

- Report type:** Report on: Received faxes; Fax log file: c:\program files (x86)\zetatafax server\server'; Report type: Standard; Report subtype: User.
- Time and date range:** Date: 22/02/2011 to 28/02/2011; Time: 08:00:00 to 10:00:00.
- Filter by:** No filtering (use all data).

Buttons at the bottom: Help, Print Setup..., OK, Cancel.

### Report On Settings

Choose whether to run reports on sent or received faxes.

### Report Type Settings

1. Choose the location of your Zetafax log file, the default will be displayed, but if you have customized your setup in anyway, browse to the alternative location.
2. Choose the type of report you wish to produce.

The available types will vary depending on the report on setting you have chosen:

### Sent Faxes

Below is a list of available report types and subtypes that can be selected for sent faxes:

- Average usage per hour - Gives a graphical summary of the average number of faxes sent each hour over a set period of time.
  - Connection time – How long has been spent sending faxes.
  - Number of faxes – How many faxes have been sent.
  - Number of pages – How many pages have been sent.
- Average usage per weekday - Gives a graphical summary of the number of faxes sent each weekday for a set period of time.
  - Connection time – How long has been spent sending faxes.
  - Number of faxes – How many faxes have been sent.
  - Number of pages – How many pages have been sent.
- Detailed - Gives all stored information about each fax sent within a set time period.
- International - Lists the number of pages sent to each country within a set time period.
- Standard - This report shows you a quick summary of each fax sent over a set period of time, this allows you to view the sender, receiver's information, the date and time sent, and the time taken for each fax that has been sent from your organization.
  - Charge code - What Charge codes have been entered against faxes.
  - Country - Which country faxes have been sent to.
  - Recipient - Who received the fax.
  - Remote server - The route the fax took.
  - User - Who sent the fax.
- Summary - This report provides a numerical report on the number of faxes, the number of pages and the time taken to send.
  - Charge code - What Charge codes have been entered against faxes.
  - Country - Which country faxes have been sent to.
  - Recipient - Who received the fax.
  - Remote server - The route the fax took.
  - User - Who sent the fax.

### Received Faxes

Below is a list of the available report types and subtypes that can be selected for received faxes:

- Average usage per hour - Gives a graphical summary of the average number of faxes received each hour over a set period of time.
  - Connection time – How long has been spent receiving faxes.
  - Number of faxes – How many faxes have been received.
  - Number of pages – How many pages have been received.
- Average usage per weekday - Gives a graphical summary of the number of faxes received each weekday for a set period of time.
  - Connection time – How long has been spent receiving faxes.
  - Number of faxes – How many faxes have been received.
  - Number of pages – How many pages have been received.
- Detailed - Gives all stored information about each fax received within a set time period.
- Device - Gives a graphical representation of the number of faxes received to each device.

- Connection time – How long has been spent receiving faxes.
- Number of faxes – How many faxes have been received.
- Number of pages – How many pages have been received.
- Standard - This report shows you a quick summary of each fax received over a set period of time, this allows you to view the sender, receiver's information, the date and time received, and the time taken to receive each fax.
  - Sender - Who sent the fax.
  - User - Who received the fax.
- Summary - This report provides a numerical report on the number of faxes, the number of pages and the time taken to receive.
  - Sender - Who sent the fax.
  - User - Who received the fax.

### Time and Date Settings

This area allows you to set the time period you would like your report to cover, this can either be between 2 dates (for example for a monthly report) or for a specified time within the last 24 hours.

To alter the time period selected:

1. Select either the **Date:** or **Time:** check box.
2. In the **From** box, type or select the start of the period you wish to report on.
3. In the **To** box, type or select the end of the period you wish to report on.

### Filter By

These options allow you to refine your report further.

If you wish to filter your report:

1. Click Specify data
2. Choose the Field you wish to filter by:

### Sent Faxes

- Charge Code - What Charge codes have been entered against faxes.
- Country - Which country faxes have been sent to.
- Recipient - Who received the fax.
- Remote Server - The route the fax took.
- User - Who sent the fax.

### Received Faxes

- Sender - Who sent the fax.
- User - Who received the fax.

3. In the **Value** box, type in the information you want to filter by, for example if you have selected to filter by User:

SSMITH

This will allow you to report only on the faxes user SSMITH has sent.

### Setting the default printer

If you wish to print your report after creating it, the **Print Setup...** option can be used to specify which

printer you use after viewing your created fax.

#### Creating your report

Having set all your options, press **OK** to create your report.



## Fax report options

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Having created a fax report there are a number of options available to you:

#### To view a fax report

When the fax report viewer is started up, the first page of your report will be shown, along with a toolbar.

This allows you to view all the pages of your fax report and change the level of magnification.

#### To print a fax report

Simply select the **Print** option from the toolbar, select the number of copies you want to print and which pages you require. When you select **OK**, the document will be printed to your automatic printer.

#### To export a fax report

If you wish to store the data, or modify it in anyway, you will need to export your report into another format.

1. Press the **Export** button.
2. The **Export** dialog will be displayed.
3. Choose the format you would like to convert your fax to. For example Excel 8.0(XLS)
4. Press **OK**.

Your report will be converted to the format you selected.





## Licensing and registration

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Depending on whether you have purchased Zetafax as a stand alone product, or as part of another product, the registration procedure may be very different. Please choose the correct option from the list below:

[Click here if you have bought Zetafax as a stand alone product.](#)

[Click here if you have bought Zetafax as part of another product.](#)



## Licensing and registration

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As part of the Zetafax installation process, you will be prompted to enter your company details and the Zetafax license number. The Zetafax Server and any add-ons will then be fully enabled for a grace period of 28 days, during which time you must register the software. Should the 28 day period expire without registering the software, you will be unable to send any faxes from your fax server until you register the software.

The starter system license number is shown on the CD or registration form supplied with the software box - you are asked to enter this when you first install the software.

**Note :** Each time you reinstall the software you will need to re-enter the starter license and each add-on or version upgrade separately. Re-entering the original starter system license will remove any add-ons or version upgrades which have since been added to the system. Online product registration will need to be performed each time your license details are modified.

### Related topics

[Installing the Zetafax Server](#)

[License organization details](#)

[Registering Zetafax](#)

[Modifying license details](#)



## Licensing and registration

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If you have bought zetafax as part of another product, you may still need to register your product. If this is the case, you will have been provided with a licence code and registration number as part of your software package.

Within the Zetafax Licensing and Registration configuration wizard, enter your licence number when prompted and select the **Next** button.

The manual registration screen will appear, enter your 6 character key obtained from your software supplier and click **Yes** to confirm you want to register manually.

Your software will now be licensed and registered.



## License organization details

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The **License organization details** dialog allows license and registration details to be entered or edited.

- To display this dialog, click **Register or upgrade software** in the **Zetafax Configuration** main dialog.

You will be prompted to enter your company details and the Zetafax license number. The Zetafax Server and any add-ons will then be fully enabled for a grace period of 28 days, during which time you must register the software. Should the 28 day period expire without registering the software, you will be unable to send any faxes from your fax server until you register the software.

### License number

Displays the license number. The first eight characters of the license number may need to be quoted to your Zetafax software suppliers, when seeking support and when upgrading your system. The screen displays the licensed number of users and fax lines, and the upgrade options installed.

### Organization

Enter your organization name. This field is compulsory.

**Important:** This name cannot be altered after you click **OK**. Make sure that you enter it correctly as this is the organization name that will appear on all outgoing faxes. If you want to change your contact details after you have registered Zetafax, you need to repeat the online registration process.

### Contact name or department

This is usually the name of the Zetafax system administrator.

### Edit

Edit the license and registration details, or add upgrades to the license. Displays the [Modify Zetafax license details](#) dialog.

### Cancel

Close the dialog and return to the Zetafax Configuration main dialog.

### Related topics

[Installing the Zetafax Server](#)  
[Registering Zetafax](#)  
[Modifying license details](#)



## License and Registration Wizard - License Number

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The **License Number** dialog allows you enter or modify your license details, and install add-ons and upgrades.

- To display this dialog, click **Edit** button in the [License organization details](#) dialog, or right-click on **Licensing and Registration** in the **Zetafax Configuration** main view.

If the software is unregistered, the license details will be blank. Before Zetafax can be used for sending faxes it must be registered with the software suppliers.

If you have registered your software previously, the current license details will be displayed. If the **license number** is changed, you will need to re-register Zetafax with the software suppliers.

#### Starter license number

The starter system license number is shown on the CD or registration form supplied with the software box - you are asked to enter this when you first install the software. When you install add-ons or version upgrades to a starter system the license number displayed changes to an upgraded number (although the first part always stays the same).

**Note** : Each time you reinstall the software you will need to re-enter the starter license and each add-on or version upgrade separately. Re-entering the original starter system license will remove any add-ons or version upgrades which have since been added to the system. Online registration will need to be performed each time your license details are modified.

#### Add-on packs installed

If you have added any add-ons or version upgrade licenses to the starter system (e.g. to add extra fax lines or users) they will be displayed in this list, together with the original starter system license number.

#### Add

Install an add-on or version upgrade license to the Zetafax system. License add-on packs add extra features, such as the programmers interface (API) or direct dial inward routing (DDI/DID). There are also add-on packs to add extra users or fax lines.

- Once a starter system license has been entered, click the **Add** button to install add-ons or version upgrades, then enter an add-on or upgrade license number (which starts with a 'U'). If the original system was registered (see [Starter license number](#) above), you must register the upgraded system within 28 days to continue sending faxes.
- To remove all add-ons or version upgrades, re-enter the starter system license number in the [Starter license number](#) field above.

Once the **Add-on number** is entered, the add-on will appear in the list of installed add-on packs in the **Modify license details** dialog.

#### Next>>

Continue to the next screen of the registration wizard, the [Software assurance](#) dialog.

#### Cancel

Do not save changes to the Zetafax license and return to the **License organization details** dialog.

#### Related topics

[Installing the Zetafax Server](#)  
[License organization details](#)  
[Registering Zetafax](#)



## Available add-ons

In addition to your standard Zetafax license, there are a number of additional licenses that you can add to your Zetafax system. These licenses allow you to access functions or enhancements, that are specifically

designed to meet different business needs. These can be purchased either as part of your initial system, or at any time

To activate an add-on licence:

1. Open the Zetafax Configuration program.
2. Select the Licensing and Registration option.
3. Right click your mouse in the licence detail screen, and select the **modify/upgrade license details** option.
4. Your existing license details will be displayed:



5. Select the **Add** option and the install add-on dialog will be displayed:



6. Enter your add-on license number.

Once the **Add-on number** is entered, the add-on will appear in the list of installed add-on packs in the **Modify license details** dialog.

The following add-on license types are available:

[Additional line licenses](#)  
[Additional user licenses](#)  
[API toolkit](#)  
[Corporate Edition feature upgrade](#)  
[Document Conversion](#)  
[Fax broadcast](#)  
[SMS gateway](#)  
[Software assurance](#)

[Software maintenance](#)  
[Premium support](#)



## Additional line license for fax or SMS

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As the number of Zetafax users grows, the volume of faxes into and out of your company may increase. Server support for these can be bought in single unit licenses or, if you think your needs will grow quickly, as an unlimited line add-on pack.

These additional lines allow you to split your fax traffic between different fax or SMS lines, reducing the time faxes take to be sent.

To setup your server to use the additional lines, [please refer to the relevant section of the configuring devices section](#).



## Additional user licenses

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As your fax needs grow you may wish to add additional users to your Zetafax enabled network fax solution. Licenses for additional users are available for this.



## Zetafax Automation Toolkit

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### Introduction to the Zetafax Automation Toolkit

The Zetafax Automation Toolkit contains the Application Programmers Interface (API) which allows you to interact directly with the Zetafax Server without using the Zetafax client. Some basic functions of the API can be used on purchase of the standard Zetafax licence, however for more complex use, an additional Zetafax Automation Toolkit add-on license is required. This can be purchased at any time by contacting your reseller or Equisys directly.

#### Without the API

The normal method of submitting messages using Zetafax is to use the client program to manually specify the recipients and message settings. When sending a fax, when a file is printed to the Zetafax printer, or a file is selected for sending from within the client program, the addressing screens are automatically displayed and filled in by the user.

#### Using the API

Using the Zetafax API, there are five additional ways of submitting messages to the Zetafax Server. These additional methods have been designed to the automatic sending of messages from other applications not only feasible, but extremely easy to implement.

SMS messages as well as fax messages can be submitted to the Zetafax Server with the Zetafax API. The ZSUBMIT program makes it simple to send SMS messages directly from other applications to mobile phones.

#### Submit files

The simplest method of sending messages is to create an ASCII file in a directory on a file server - a "SUBMIT" file. This file can contain both the contents of the message and the addressing information, or these may be broken into two files. Zetafax scans the directory for new files and automatically handles any files it finds, sending messages to either a fax addressee or mobile phone via SMS. A machine with the Zetafax Client software installed can be used to monitor the process and resubmit any faxes that fail repeatedly.

Details on how to create SUBMIT files are given in the API help file.

#### Embedded addressing

Addressing instructions can be embedded into documents created by word processors and other applications to indicate where a fax should be sent, together with a wide range of settings such as the time of sending, priority, resolution, cover sheet, and letterhead to use. The commands are embedded in the document using a special syntax; for example:

```
%%[Fax:123 456 7890]
```

When the document is printed using the Zetafax printer driver, the embedded commands are used by the Zetafax Client program in place of the addressing dialogs. Provided adequate details are given no dialogs will be displayed and the fax or faxes will be submitted to the Zetafax Server automatically.

When sending faxes automatically from other Windows applications, it may be simplest to embed the addressing information in the message itself using embedded commands, prior to printing it using the Zetafax Windows printer driver. This is supported as one of the API toolkit alternatives.

#### DDE commands

Dynamic Data Exchange (DDE) may be used to pass addressing information across from a Windows application to the Zetafax client, prior to printing a message using the Zetafax Windows printer driver.

#### COM and C Language libraries

The most powerful way of passing faxes across to the Zetafax Server for sending is using the COM or C language API. This allows for the monitoring of the status of a queued message, including the retrieval of a full history log once a message has completed.



## Corporate Edition feature upgrade

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The Corporate Edition add-on is ideal for deployment by corporate organizations who may require Least Cost Routing plus support for Windows 2003 child domains and cluster environments when using Microsoft Exchange - but who may not have 50 or more fax users.

Examples include companies wanting to supply Zetafax to departments or other groups of users. The add-on offers all the features of the Corporate Edition except Software Assurance, which must be purchased separately.



## Document conversion

Zetafax renders most regularly used document types (such as word processing documents and spreadsheets) into TIFF format so that they can be faxed as attachments. Customers needing to fax other, less commonly used or more specialized document types will require the Document Conversion add-on. Using this add-on, the Zetafax Server can convert over 225 files types - including word processing, spreadsheet, presentation, graphics and database files to fax TIFF format without having to install the authoring application on the Zetafax Server PC. With the Document Conversion add-on, the Zetafax Server is enhanced in the following areas:

### Web Client

Users of the web client are able to attach any supported file types to new outbound messages.

### API

Users of the Zetafax API can fax file attachments of any type from third party applications because Zetafax renders them into TIFF format documents. Without the Document Conversion add-on, users of the web client and API are only able to submit ASCII text and most graphics file formats only e.g. BMP, .JPEG, and .TIFF.

### Email gateway

The email gateway can be configured to use either the native application or the Document Conversion add-on to convert files to TIFF format. If using the Document Conversion add-on, it is not necessary to install rendering applications on the fax server itself. Without it, the following rendering applications are supported when using the Zetafax email gateway and must be installed on the fax server:

- Adobe Acrobat 3.0, 4.0, 5.0, 6.0, 7.0.



## Failover

The Zetafax failover solution provides system continuity protection for the sending and receiving of fax messages should a Zetafax Server computer fail. The solution provides two servers - a Primary server (for normal use) and a Back-up server (taking over on failure of the Primary server). The two servers are set up separately and installed on separate machines. When failure is detected on the primary machine, the secondary Zetafax Server will automatically take over processing.

### Related Topics

[Failover](#)



## FaxBroadcast

FaxBroadcast is a specialist fax tool for businesses that want to regularly send large fax jobs to multiple

recipients. It can manage fax jobs from contacts held within databases or system files. It consists of a specialist Client and an optimized server for maximizing throughput of faxes.

To install FaxBroadcast please select custom install when you install the Zetafax Client Applications (P28). FaxBroadcast requires a separate license which you should request from [sales@equisys.com](mailto:sales@equisys.com) in the UK, [sales@usa.equisys.com](mailto:sales@usa.equisys.com) in the US or your local Zetafax distributor outside of these countries at [www.equisys.com/buy/find\\_supplier.html](http://www.equisys.com/buy/find_supplier.html)

Further help is provided at [http://www.equisys.com/support/Help\\_and\\_Resource/Zetafax/Help/FaxBroadcast/](http://www.equisys.com/support/Help_and_Resource/Zetafax/Help/FaxBroadcast/)



## SMS gateway

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The Zetafax SMS Gateway add-on allows networked Zetafax users to send text messages to colleagues and to customers' mobile devices direct from their desktop. Text messages can also be received by an individual directly on their desktop, or processed by a third party application using the Zetafax API.

The SMS Gateway add-on requires a single GSM modem which may be purchased separately or as part of a bundle from Equisys.

To set up the SMS gateway having added your SMS gateway license, you will need to configure your GSM modem. [Please refer to the configuring devices section of the help for more information on how to do this.](#)

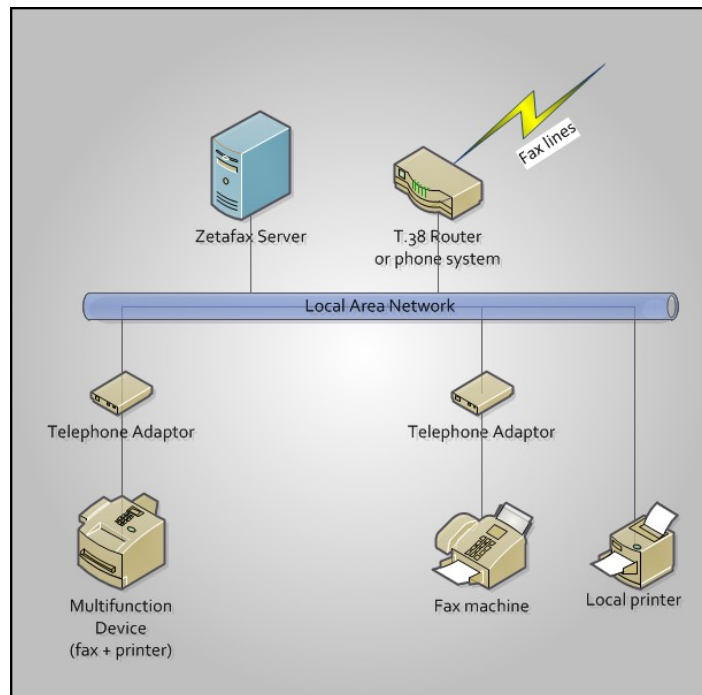


## Fax Relay

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The Zetafax Fax Relay add-on allows you to submit faxes from existing fax machines rather than having to go to a computer to access the Zetafax client or extensions. Fax relay works by allowing fax machines to communicate to the Zetafax Server via T.38 either through the Standard FOIP or SR140 connectors. Once configured users can send faxes from fax machines, depending on the settings chosen, you could for example enter a valid DID followed by the star (\*) and then the fax number e.g. 4104\*02072034100. This would send the fax from the fax machine but would be sent via Zetafax from the account matching the DID and appear in the corresponding outbox, with all the cost savings and archiving advantages of using Zetafax.





For more details please see the section on [Fax Relay Configuration](#).



## Software assurance

The Zetafax Software Assurance Program protects your investment in Zetafax software. Software Assurance provides member customers with all software version upgrades and updates for a period of 1, 2 or 3 years from the date of the agreement. In the UK only, Software Assurance also provides member customers with Technical Support via email for the duration of the contract.

For a one-off fee, all upgrades are supplied to Software Assurance Program holders at no further charge, and information on new releases and updates are communicated as a priority.

The Software Assurance Program is available to all Zetafax for Networks customers starting with 5 users and ranging to 100 user systems and above. One year's Software Assurance is included as standard in certain countries with the Zetafax Business Edition and in all countries with the Zetafax Corporate Edition.



## Premium Support

Zetafax Premium Support provides customers with telephone and email support for the duration of the contract. Zetafax Premium Support is available for 1, 2 or 3 year contracts with discounts available for 2 and 3 year contracts.

Over 95% of Support calls logged with Equisys are answered within 2 hours and all emails are answered

within 24 hours. Each Support call logged remains open until it is resolved, however long it takes.

**Note:** Zetafax Premium Support is not available outside the United Kingdom.



## Software maintenance

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Zetafax Software Maintenance combines Software Assurance giving you access to all software version upgrades, and Premium Support for a period of one year. Software Maintenance is also available for 2 and 3 year contracts at discounted prices.

**Note:** Zetafax Software Maintenance is not available outside the United Kingdom.

### Related Topics

[Software assurance](#)

[Premium support](#)



## Fax over IP Connectors

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The Zetafax Fax over IP Connector add-on provides an efficient way to integrate a fax server with Voice over IP (VoIP) phone systems, or to enable server virtualization. VoIP phone systems can be used for faxing directly, saving the cost of installing separate phone lines for use by the fax server.

For phone systems that are not IP, the Zetafax fax server supports a range of media gateways that will manage the communication between the PBX and the IP network via T.38 and enable conversion from T.38 to T.30 for communication over the PSTN, enabling compatibility with traditional fax machines.

Zetafax has two Fax over IP add-on options, Standard FoIP and SR140.

### SR140

The SR140 Edition uses market-leading Brooktrout SR140 technology from Dialogic, for the highest levels of performance and interoperability. This supports a wide range of phone systems and gateways, and has been accredited for use with leading phone systems.

### Standard Edition

The Standard Edition provides a more cost-effective solution for use with selected standalone gateways. It is designed for use in smaller virtualized server systems where third party accreditation is not required.

Read more about the Zetafax FoIP Connectors [here](#).



## License and Registration Wizard - Registration Center

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Zetafax must be registered within 28 days of a license change for you to be able to keep sending faxes. Registration of Zetafax is done via our online Product Registration Page.

## Zetafax Online Registration Process

- To Register your software open the Zetafax **Configuration Program**.
- Then select **License and Registration** from the console root.
- Select **Actions** -> Modify /upgrade license details from the menu.
- This will open up the **License and Registration Wizard**

### License and Registration Wizard

The **License and Registration Wizard** allows you to set up additional licenses and to configure the details that will appear on your registration. You can purchase licenses for additional users, additional lines, API functionality, or integration with third-party products.

When the wizard launches, the **License number** dialog is displayed.

**Step 1 of 4: License and Registration Wizard - License Number**

The license number includes information about the number of users and fax lines in the Zetafax system you have purchased.

License number

Add-on packs

If you have purchased an add-on for extra users or additional features you should enter these license numbers now.

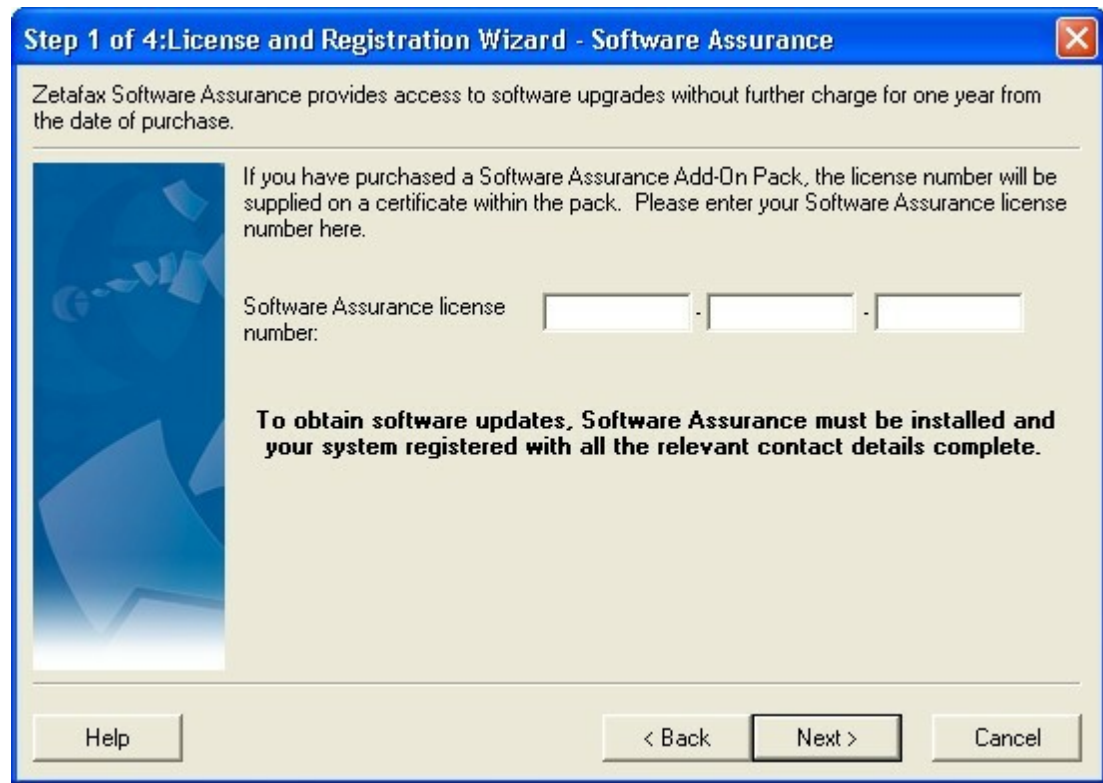
Add-on packs installed:

(no upgrades installed)

Add

Help < Back Next > Cancel

1. Enter your License number
2. Click **Add** to set up additional licenses
3. Contact [sales@equisys.com](mailto:sales@equisys.com) for further information on add-ons for Zetafax.
4. Click **Next** when finished.
5. In the **Software Assurance** dialog, enter your Software Assurance number.



**Step 1 of 4: License and Registration Wizard - Software Assurance**

Zetafax Software Assurance provides access to software upgrades without further charge for one year from the date of purchase.

If you have purchased a Software Assurance Add-On Pack, the license number will be supplied on a certificate within the pack. Please enter your Software Assurance license number here.

Software Assurance license number:  -  -

**To obtain software updates, Software Assurance must be installed and your system registered with all the relevant contact details complete.**

Help < Back Next > Cancel

Software Assurance entitles you to free upgrades for one year. If you have a Software Assurance license, you must register it here to be eligible for free upgrades. See [Software Assurance](#) for more information.

#### License and Registration - Online Registration

Copies of Zetafax 2012 and any associated upgrade or add-on packs require the registration to be completed within 28 days to be able to continue sending faxes. You will be prompted to register your copy if you have not done so, this will open up the License and Registration Wizard, it offers you two methods of registering depending on whether the machine you are using has an internet connection. If the machine lacks access to the internet it is possible to register your copy of Zetafax from another machine.



### Registering from another computer

To register your copy of Zetafax from another computer, select the **Register from Another Computer** button. This will open up a dialogue box containing the details necessary to perform a registration from another machine, copy these details and follow the instruction detailed below from a computer with internet access.

### Register Online

1. Click the **Register Online** button.
2. Add the Company name and select the **Register** button, the Product Registration Page should open already populated with the license key details.
3. Add any remaining missing details and when completed click the **Register** button, your registration code will be emailed to the email address provided on the registration page.
4. Enter this registration code into the License and Registration Wizard, select the **Finish** button to complete your registration process.

### Data Protection Statement

Click the Read More button to read details of the data protection statement.

### Back

This goes back to the previous screen in the registration wizard without saving any changes. Displays the **Data protection statement** dialog.

**Finish**

Confirms the information typed, and ends the registration wizard. If automatically registering, re-registering or manually registering, a further dialog will be shown. If no changes have been made, then you will return to the **Zetafax Configuration** program.

**Cancel**

Close the dialog and return to the **Zetafax Configuration** program.

**Related topics**

[Installing the Zetafax Server](#)

[License organization details](#)

[Modifying license details](#)



## Administration utilities

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These topics describe the Zetafax Server administration utilities, which allow the network administrator to display and modify parameters and files on the fax server. It also describes the Windows diagnostic tools that can be used to monitor the Zetafax Server.

### Running the administration utilities

The administration utilities are stored in the sub directory SERVER of the Zetafax home directory. The **Zetafax Configuration** program is a snap-in for the Microsoft Management console, and requires MMC version 1.2 or later to be installed on your machine.

The **Zetafax Configuration** program can be run from a client or server computer, but requires full access permissions to the Zetafax directories. The other administration utilities must be run on the fax server, again with full access to the Zetafax files.

### Related topics

[Zetafax Configuration](#)

[Zetafax Server console](#)

[Archiving](#)

[Automatic printing](#)

[Billing log](#)

[Windows diagnostic tools](#)

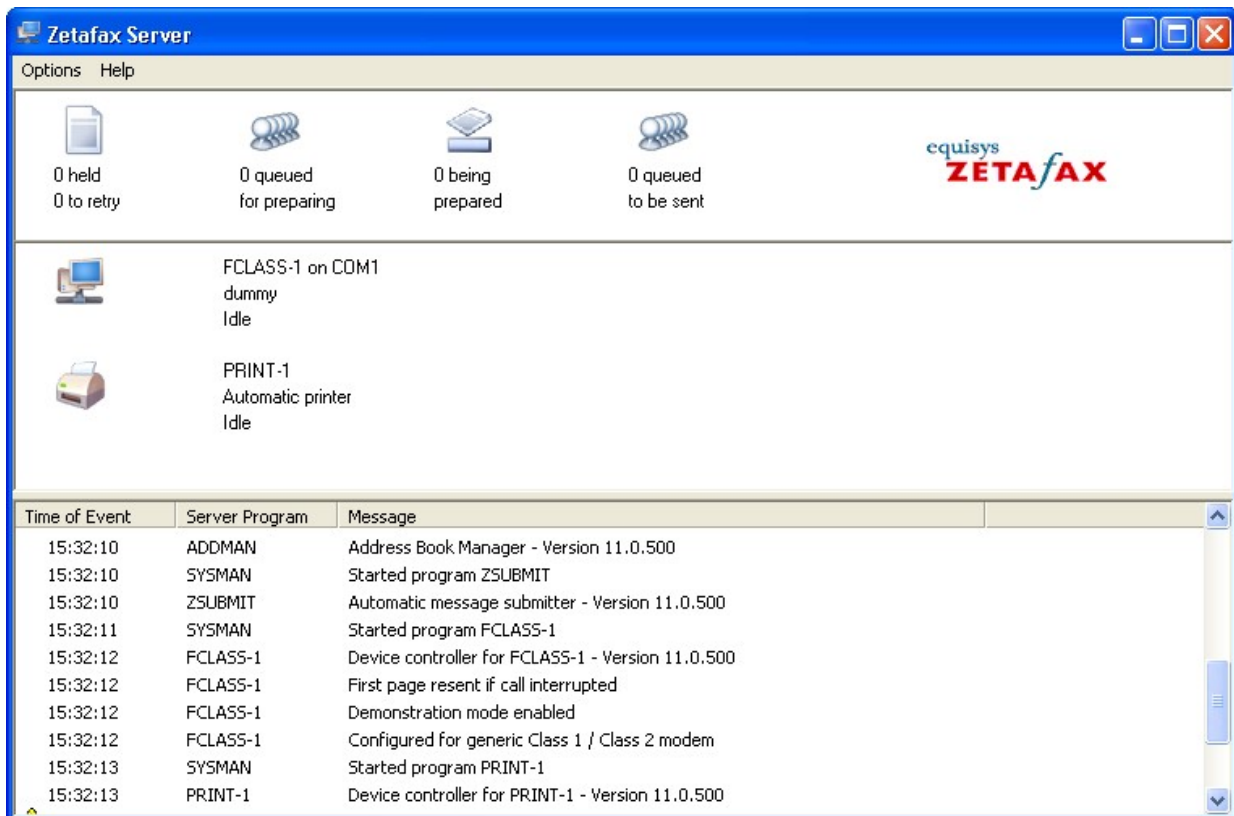


## Starting and Stopping the Zetafax Server

This section describes how to start the Zetafax Server and, if necessary, how to stop it. To send and receive faxes from other Zetafax components, the Zetafax Server software must be running. You can run the Zetafax Server as either a service or a desktop application.

### Run as an application

#### To run the Zetafax Server



- Click the **Start** button and select **Programs>Zetafax> Zetafax Server**.

The Zetafax Server program is displayed. When the fax server starts, a number of messages appear, including **Zetafax Server started** at or towards the end. The server program shows the progress of the fax server at any time, including the starting and stopping of various processes. It includes a list of fax server messages along with icons showing the status of queues and devices.

The **Zetafax Server** window can be minimized at any time.

If the fax device message is **DEVICE ERROR** or similar, check that the fax modem or card is correctly connected. To reconfigure which communications port the modem or card is on, restart **Zetafax Configuration** and edit the device options. You must also restart the fax server for changes to take effect.

For more information on device options, refer to the [Zetafax Configuration](#) section.

#### To stop the Zetafax Server



- On the **Options** menu, click **Exit Server**.

### Run as a service

#### To run the Zetafax Server Monitor

- Click the **Start** button and select **Programs>Zetafax>Zetafax Server**.

The Zetafax Server Monitor is displayed, showing the progress of the fax server, including the starting and stopping of various processes. It includes a list of fax server messages along with icons showing the status of queues and devices.

When Zetafax is running as a service, the Zetafax Server program behaves as a monitor program, and can be closed without stopping the service.

As a Windows service, you can configure the Zetafax Server using the Control Panel's service configuration option.

To launch this, open the **Control Panel** and select **Administrative Tools**, then **Services** (Windows 2003 or later).

By default, the service is added using the **LocalSystem** account, with **Manual** startup. If the Zetafax files are stored on the network, or if you use a network printer, you need to use an alternative account with network access permissions. We recommend that you create a new account. Set the **User cannot change password** and **Password never expires** options as the account password is stored separately by the **Service Manager** program.



## Zetafax Configuration

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The **Zetafax Configuration** program configures the fax server software and devices and sets up Zetafax users and their permissions. The program resides on the hard drive as C:\Program Files\Zetafax Server\SERVER\ZFSETUP.EXE. **Zetafax Configuration** requires the Microsoft Management Console (MMC), to be installed when you install Zetafax.

**Zetafax Configuration** allows day-to-day maintenance and administration of a Zetafax system. It provides the following options. Click a heading for more detailed information:

### [Users and user groups](#)

This option allows you to create and delete users' accounts, and specify when and where each user may send faxes. Each user can be set up as an administrator, who can edit the network address book, submit urgent messages and remotely configure and monitor the Zetafax Server. Use the **Add new Zetafax users wizard** or **Add new Zetafax user** shortcut in the right pane to create and configure a new Zetafax user.

### [Devices](#)

Use this option to add and configure devices, such as fax modems, intelligent fax boards and printers for printing incoming and outgoing faxes. Use the **Add device** shortcut in the right pane to add and configure a new device.

### [Automatic inward routing](#)

This option allows you to set up automatic inward routing of faxes between users on the same or another Zetafax system.

### [Server settings](#)

With this option you can:

- Specify whether incoming and outgoing faxes are archived to disk.
- Select which printers are used for the automatic printing of incoming and outgoing faxes.
- Specify whether charge codes are enabled or set as a requirement.
- Define off-peak call times along with geographical areas of local, national and international telephone calls to control where each user can send faxes.
- Specify the number of dialing attempts, together with the delay between retries.
- Configure and enable remote administration of the Zetafax Server.
- Configure Least Cost Routing servers, rules and links. For more information, see [Least Cost Routing](#).
- Configure Fax Relaying using Zetafax.
- Adjust various system defaults.

### [cover sheets and letterheads](#)

This option allows you to create and install new cover sheets and letterheads for use in Zetafax.

### [Licensing and registration](#)

This option allows you to register the software when first purchased, or upgrade it at a later date.

### [www.equisys.com](http://www.equisys.com)

Use this option to launch your web browser and connect to the **Support** page on the [Equisys web site](http://www.equisys.com).

### **Related topics**

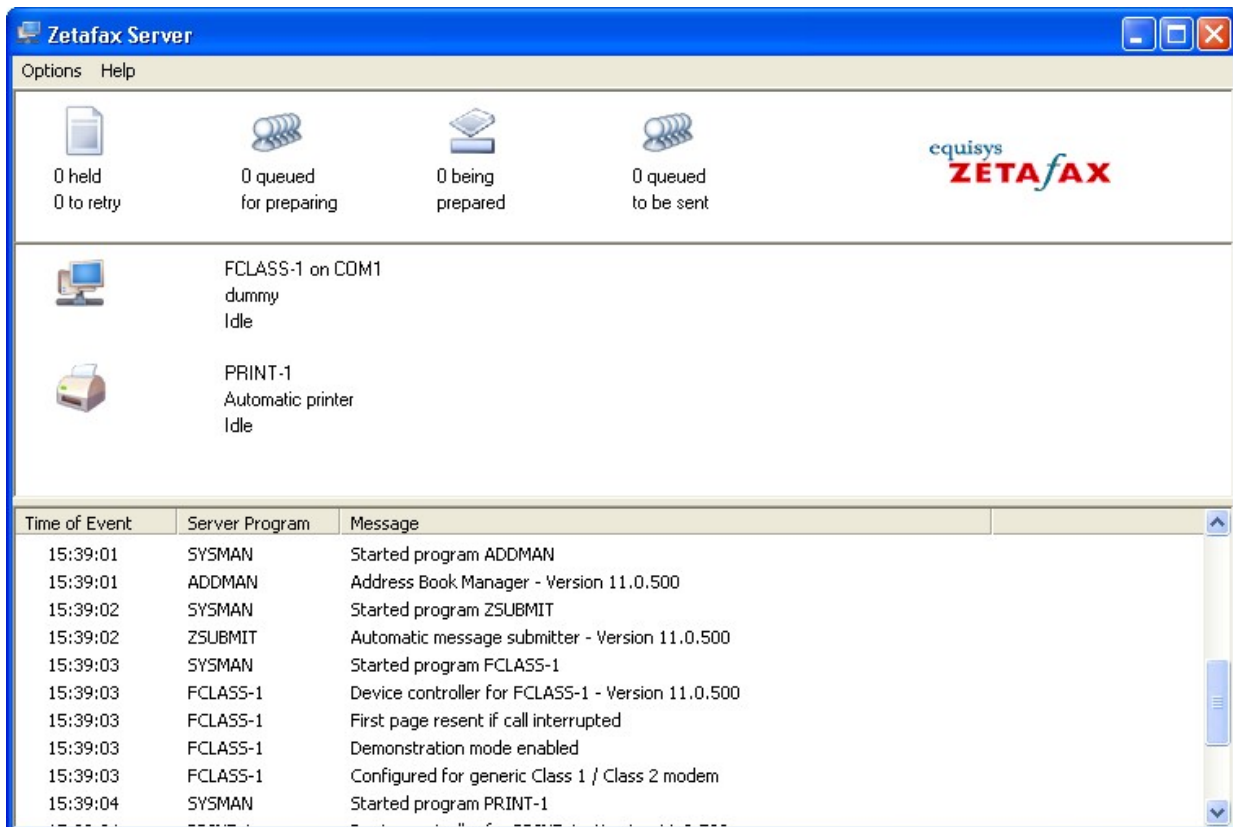
[Zetafax folder](#)

[Zetafax Configuration menu commands](#)



## Zetafax Server console

The Zetafax Server console, ZSERVER, is the program which runs SYSMAN, as described in [Programs on the Zetafax Server](#), to start the fax server programs. It then displays the Zetafax Server window to show status and error messages from the fax server programs. To shut down the fax server, close the ZSERVER window. This notifies SYSMAN then exits, and SYSMAN in turn closes down the fax server programs.



If you are running the fax server as a service, running ZSERVER will allow you to monitor the activity of the service in the background and the title bar changes to **Zetafax Server Monitor** to indicate this. Under these circumstances, closing ZSERVER will only close the monitor program, and will not affect the fax server service. ZSERVER then provides a menu command to close down the fax server should you need to.



## Archiving

Zetafax allows you to archive every fax sent or received on disk, allowing you to retrieve them days or even months later. You can also print faxes automatically on any network printer, with an optional status page giving the connection time and details.

### Logging and billing

Zetafax has a variety of ways of allowing users or the system administrator to keep track of fax usage. Every fax submitted by a user stays in their **Out** window until they delete it, allowing them to view what was sent and to retrieve the transmission history. The *logging facility* allows users to check whom they have sent faxes to, and administrators can obtain a list for all users. Finally, the *billing log* has an entry made for every fax which is sent, including details such as the fax number and connection time; for more information, see [Billing log](#).

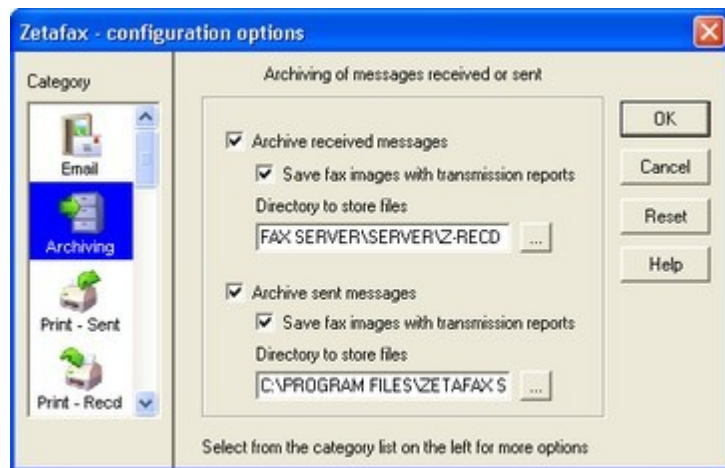
### Archiving copies

The archiving feature works in addition to these mechanisms, and is configured on the Zetafax Server. It stores a copy of every fax sent and/or received, exactly as transmitted. The fax itself is saved as a graphics file, which can subsequently be viewed or printed, and a transmission history for the fax is saved in a separate file. If you wish to keep a copy of faxes on disk, it is best to use this central archiving feature and to encourage users to tidy up their **In** and **Out** windows regularly.

### Configuration

Archiving is configured using the **Zetafax Configuration** program.

- Launch the **Zetafax Configuration** program (**Start** menu, **Programs** submenu, **Zetafax** submenu).
- In the left pane, click **Server Settings**.
- In the right pane, double-click on **Archiving of messages received or sent**.
- The archiving configuration dialog will appear.



The dialog lets you enable archiving for faxes received or sent independently. You would normally select the **Save fax images with transmission reports** option - otherwise the transmission report will be saved, but you will not be able to view the contents of the fax.

### Files created

The archive files are created in the directories specified in the dialog - by default these are *zfax* \SERVER\Z-RECD for received faxes and *zfax* \SERVER\Z-SENT for sent faxes. A separate sub-directory is then created for each day, with a name of the form *yymmdd* ; for example, faxes received on the 1st October 2000 would be stored in the directory *zfax* \SERVER\Z-RECD\001001. Here *zfax* is the root Zetafax Server installation folder (e.g. C:\Program Files\Zetafax Server).

Each fax sent or received by Zetafax is given a *message ID* , which is an eight character code, and is unique for each message submitted to the Zetafax Server. The message ID is displayed on the message information and log display screens on the Zetafax client, and also stored in the billing log.

Two archive files are created for each fax; one contains the transmission history (with extension .CTL), and the other is a TIFF format graphics file containing the fax itself (with extension .G3N or .G3F). The main part of the file name is the eight character message ID.

## Retrieval

Archived files may be retrieved and viewed by any user who has access rights to the archive directories by using the Zetafax client.

- Select the relevant archive folder using the **Folder list** window in the Zetafax client. Select the folder to view for the required day and Zetafax will display the archived faxes for that day in the **Filed** window.

The Comment field displays the name of the user who sent or received the fax, and the original description (e.g. "To: Fred Smith" or "From: Smith and Sons"). The name of the archive file is also displayed, which allows you to find the correct message if you already know the message ID.

Once the correct message is found you can view it, print it, or look at the message transmission history in the same way as for entries in the **In** or **Out** windows.

## Related topics

[Archiving of messages received or sent](#)

[Billing log](#)



## Billing log

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A record of all faxes sent is kept in the billing log, FAX.LOG, and all faxes received are kept in FAXIN.LOG. These files are stored in the SERVER\Z-DB sub directory of the Zetafax home directory.

A line is added for every message addressee sent to by fax, giving details such as the Zetafax username, addressee name and company, the fax number, the connection time and number of pages sent.

The billing log file may be imported into a spreadsheet application for analysis, or you can use the Zetafax report writer to generate tabular and graphical analyses of your company's faxing habits.



## Windows diagnostic tools

Windows Server 2012, 2008 or 2003, Windows XP and Windows Vista have built in diagnostic tools to help monitor and troubleshoot applications. This section describes how the Zetafax Server interacts with the Event Viewer and Performance monitor.

### Event Viewer

The Windows Server 2012, 2008 or 2003, Windows XP and Windows Vista Event Viewer allows you to monitor any problems that may occur on the Zetafax Server during everyday use. It provides information about such events as errors, warnings, and the success or failure of tasks. An event is any potentially significant occurrence in the system or in an application. Some critical events are noted in on-screen messages, as well as in an event log. Non-critical events are merely logged.

To start the Event Viewer:

- Click the **Start** button, point at **Programs** , point at **Administrative Tools** , and then click **Event Viewer** .

You can view only Zetafax Server events for a given time period by applying a filter to the log.

### Types of events

Zetafax logs events with varying severity: error, warning, and information messages are recorded in the application log and logging occurs whether Zetafax is run as an application or as a service.

The complete list of events that the Zetafax Server lists to the event viewer is shown in the following table:

Event	Description
Error <i>error</i> checking fax device	There was an error communicating with a fax device.
Error <i>error</i> writing to printer	There was an error while communicating with a network printer.
Unable to write to printer	A network printer is unavailable.
Device recovered	A device which was in a failed state has recovered.
Failing device - error <i>error</i>	A device has encountered a serious problem which is likely to require fixing.
Unable to initialize printer <i>printer</i> on <i>port</i>	Specifies the printer name and port ID.
Printer driver name ' <i>name</i> ' invalid	The name by which the system tried to access a printer does not correspond to any printers visible to the system.
Printer driver file ' <i>filename</i> ' not found	A printer driver file (used by the OS to communicate with the printer hardware) could not be found.
Printer driver file ' <i>filename</i> ' invalid	The named driver file is corrupted, or the wrong driver for the specified printer.
CheckPrinter() returned OK - printer recovered	The printer has come on-line after being unavailable.
Device recovered	The (fax) device has come on-line after being unavailable.
Process <i>name</i> terminated	One of the component programs has closed down and is no longer running.
System startup terminated	The system has been shut down during startup - usually by user choice.
Process <i>name</i> terminated - shutting down system	One of the key programs (e.g. QUEUEMAN, SYSMAN) has crashed and the rest are closing normally as the system can no longer function.
Error <i>error</i> running program ' <i>name</i> '	A specified program has produced a numbered error.
Windows error <i>error</i> loading program ' <i>name</i> '	Windows could not find/start a named program.

## Performance monitor

The Windows Server 2012, 2008 or 2003, Windows XP and Windows Vista performance monitor application allows you to monitor the performance of Zetafax Servers either locally or remotely. It uses a number of counters to track data, such as failed faxes for a specified device. You can view this data in real time, log it for future study, use it in charts and reports, and set alerts to warn when a threshold value is exceeded. This data may be used to determine device bottlenecks and whether it may be necessary to add an additional device to your fax server.

To start the performance monitor:

- Click the **Start** button, point at **Programs** , point at **Administrative Tools (Common)** , then click **Performance Monitor**.

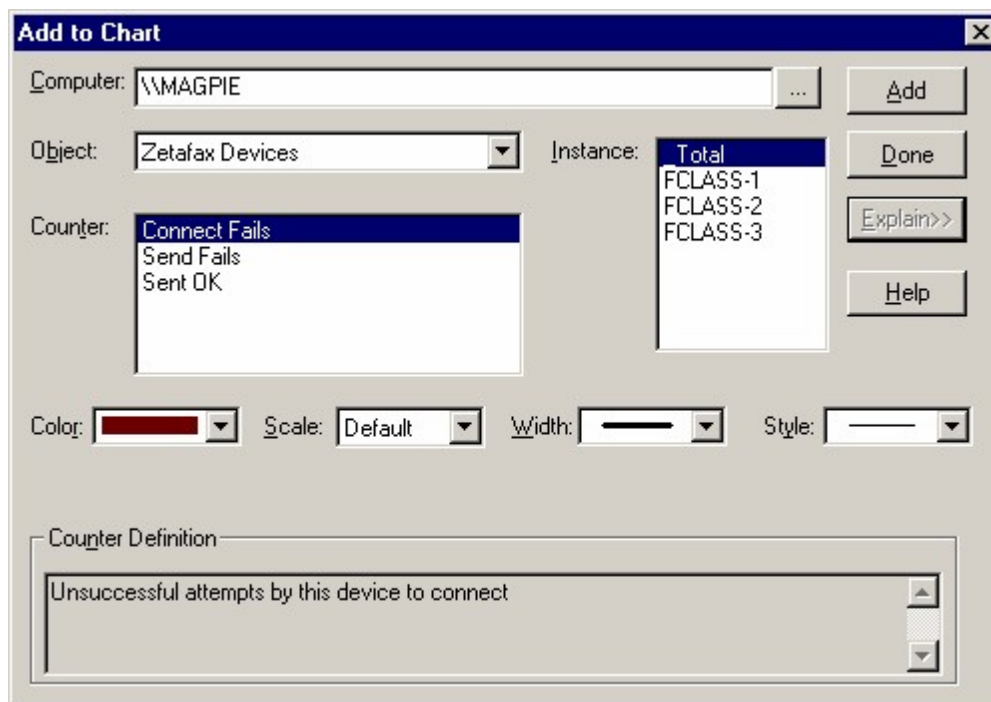
## Performance monitor objects

The performance monitor measures the behavior of objects running on a given computer. Zetafax adds objects such as Zetafax Server and fax devices to the list of core objects. Some objects have multiple instances; for example, each physical device, such as a fax modem will appear as a single instance of Zetafax devices.

## Performance monitor counters

Each object has a set of counters defined for it, and it is the counters which record the activity level of an object. An example of counters for a Zetafax device object would be: **Connect fails** , **Send fails** , and **Send OK** .

- Click **Explain>>** in the **Add to** dialog to display more information about the use and type of data compiled for each counter.



The following table gives information about the counters logged by the Zetafax Server:

### Zetafax Server

#### Counters

Device Receive- Failed

#### Description

Devices configured for receiving/sending which have



Device Send- Failed	failed. This is not usually a temporary error - failed devices are likely to remain unavailable without attention from a system administrator.
Device Receive- OK	Devices configured for receiving/sending which are currently operating, capable of operation, or experiencing temporary problems.
Device Send- OK	Total number of fax devices - configured to receive, to send, and total of both (independent of failed/OK status).
Device Receive- Total	The number of messages converted and ready for sending, but on hold due to user choice.
Device Send- Total	Messages sent by a Zetafax client, waiting to be converted into send format.
Messages- Deferred	Messages currently being converted into the format in which they will be sent.
Messages- Waiting Conversion	Messages which have been unsuccessfully sent (perhaps the recipient was engaged or a device was offline). They are waiting to be resent.
Messages- Converting	Messages converted into the correct format for sending, waiting for an available hardware device.
Messages- Waiting Resend	Messages currently being sent through output devices.
Messages- Waiting Conversion	
Messages- Sending	

### Zetafax Devices

#### Counters

Connect Fails	Attempts to send a message which have failed owing to inability of the device to establish a connection, such as a busy tone.
Send Fails	Messages which were submitted to the device but failed to reach their destination.
Sent OK	Messages which have been successfully sent by this device.
Total Attempts (sum of above 3)	Total number of messages which the system has attempted to send.
% Connect Fails	Percentage of connection failures to total attempts to send a message.
	Zero until ten attempts have been made - no '_Total' available.
% Send Fails	Percentage of messages which were submitted to the device but failed to reach their destination. Zero until ten attempts have been made - no '_Total' available.
% Sent OK	Percentage of messages which have been successfully sent by this device. Zero until ten attempts have been made - no '_Total' available.

### Zetafax Least-Cost Routing Links

#### Counters

Messages Submitted	Messages sent to the remote server, both acknowledged and unacknowledged.
Messages Received	Messages received from the remote server.
Messages Acknowledged	Messages accepted by the remote server for processing.
Messages Unacknowledged	Messages sent to the remote server, but waiting response.
Messages Sent OK	Total of messages sent by this link to remote server - no '_Total' available.
Messages Failed (Timeout)	Total of messages sent which timed out - no '_Total' available.
Messages Failed (Rejected)	Total of messages sent to remote server and rejected - no 'Total' available.
Messages Failed (Remote Error)	Total of messages sent to remote server and failed due to error at that server - no 'Total' available.
Messages Failed (Device Fault)	Total of messages sent which failed owing to device failure - no 'Total' available.





## Zetafax Server remote administration

Provides configuration options for the **Zetafax Remote Administration** program. More information Click [here](#) for more on configuring Remote Administration.

These settings control whether the Zetafax Server can be administered from a PC other than the one where the Zetafax Server is installed. There is a separate install package on the product CD that enables **Remote Administration** to be installed on another PC. The settings are described in detail below:

### Zetafax Server computer name

The name of the computer on which the Zetafax Server is installed. This should not normally need changing.

### Allow remote server monitoring

Check this option to enable the Zetafax Server monitor program to run on another PC.

### Allow remote server restart

Check this option to enable the Zetafax Server to be restarted from another PC using remote administration.

### Allow remote device control

Check this option to enable the devices to be brought on and offline from another PC using remote administration.

### Allow remote link control

Check this option to enable the control of links from another PC using remote administration. This option is only available if LCR is enabled.

### Queue status update frequency (seconds)

This setting controls the frequency with which the remote Zetafax Server monitor program is updated with information from the Zetafax Server.

### Related topic

[Installing Remote Administration](#)



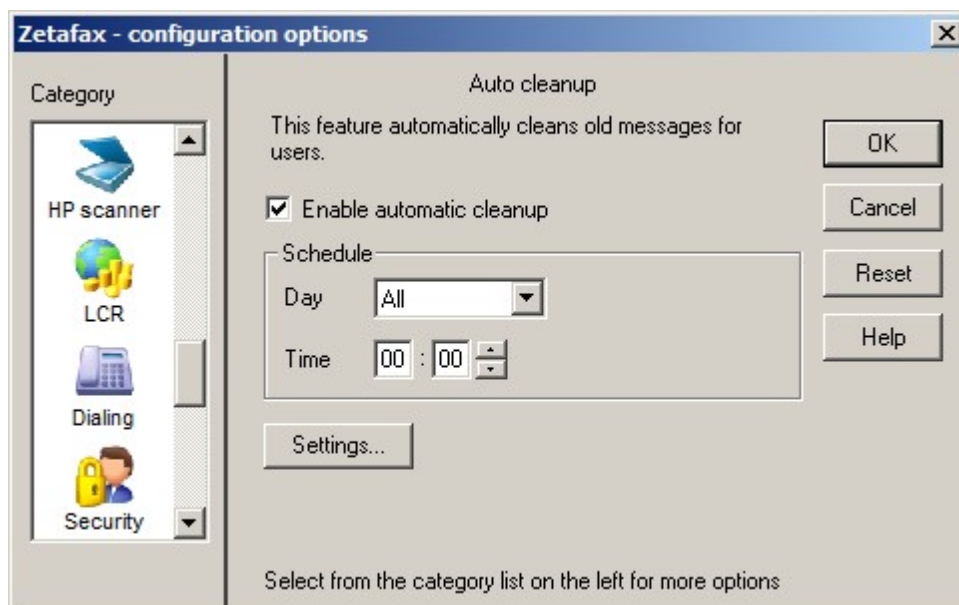
## Auto Cleanup

Zetafax Auto Cleanup allows you to set Zetafax to clean your users Inbox and Outbox of unwanted messages automatically. This can be scheduled to occur outside of normal operating hours and is fully customizable enabling you to specify both general cleanup settings that apply to all accounts as well as specific per User or Group settings. If Zetafax is not running at the scheduled Auto Cleanup time it will automatically perform a Cleanup when Zetafax is next started. **Warning:** Items deleted via Auto Cleanup will not be added to the Recycling Bin and will be permanently deleted.

### Scheduling Auto Cleanup

To adjust the Auto Cleanup settings open the **Zetafax Configuration program** and select **Server Settings** and then scroll down to **Automatic cleanup of messages**, the configuration options window will appear.

- Check the Enable automatic cleanup checkbox
- Use the Day drop down option to select the day on which to run Auto Cleanup, you can either select a specific day or All for every day.
- Next schedule the time to run Auto Cleanup, using the 24 hour clock.
- Please note it is recommended that this is set to a time of low usage such as during the night.

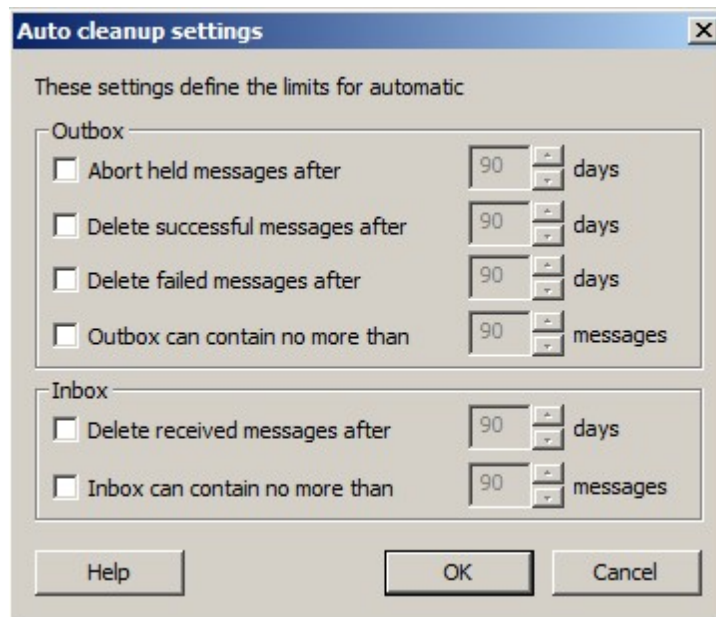


### Setting the System Wide Cleanup Criteria

The Auto Cleanup feature allows you to specify limits for your systems Inbox and Outbox. These settings allow you to determine how long items are retained for as well as a maximum number of messages that are allowed.

- To determine the criteria used by Auto Cleanup to decide which items to delete click the Settings... button.
- Activate each of the criteria that you require, these are:
  - Outbox Settings
    - Abort held messages after - Will abort any messages that have been held after the specified timeframe, the default is 180 days.

- Delete successful messages after - Will delete sent messages after the specified timeframe, the default is 180 days.
  - Delete failed messages after - Will delete failed messages after the specified timeframe, the default is 180 days.
  - Outbox can contain no more than - Will delete the oldest messages to maintain the specified Outbox size, note Zetafax will prioritize the deletion of successfully sent messages over held items to ensure queued messages are not deleted in error. The default is set to 100 messages.
- Inbox Settings
  - Delete received messages after - Will delete messages after the specified timeframe, the default is 180 days.
  - Inbox can contain no more than - Will delete the oldest messages to maintain the specified Inbox size, the default is 100 messages.
- Click OK to close the form.



Please note you must choose a value between 0 and 9999 for each option activated, note the arrow controls stop at a minimum of 14 days and a maximum of 999 which we are the recommended limits. To add a value outside this range click into the field and type it in manually.

### Setting the User and Group Specific Cleanup Criteria

The User and Group settings operate in the same way as the system wide Auto Cleanup settings, but if a User or Group has their own settings these will override the system settings. The Group option also lacks the Outbox settings as Groups do not have dedicated Outbox's.

- To adjust the Auto Cleanup settings open the **Zetafax Configuration program** and select **Users and user groups**.
- Then select either the **Zetafax users** or **Zetafax groups** as required.
- Next select the user or group you require, when the user or group details window appears select the Cleanup... button.
- Activate each of the criteria that you require, these are:
- Outbox Settings
  - Abort held messages after - Will abort any messages that have been held after the specified timeframe, the default is 180 days.
  - Delete successful messages after - Will delete sent messages after the specified timeframe, the default is 180 days.
  - Delete failed messages after - Will delete failed messages after the specified timeframe, the default is 180 days.
  - Outbox can contain no more than - Will delete the oldest messages to maintain the specified Outbox size, note Zetafax will prioritize the deletion of successfully sent messages over held

items to ensure queued messages are not deleted in error. The default is set to 100 messages.

- Inbox Settings
  - Delete received messages after - Will delete messages after the specified timeframe, the default is 180 days.
  - Inbox can contain no more than - Will delete the oldest messages to maintain the specified Inbox size, the default is 100 messages.
- Click OK to close the form.



## Zetafax failover

To help reduce the impact of system failure on your faxing needs, you can set up a second Zetafax Server that will detect issues with your standard server, and activate to allow any faxes to be sent.

This allows you not only to deal with issues such as system crashes, but also allows you to carry out system upgrades without interrupting Zetafax use.

In order to set up a system for failover, you will need:

- A primary Zetafax Server
- A Back-up Zetafax Server
- A File Server
- A failover license

This section deals with how to set up your system for failover.

- [Installing a failover system](#)
- [Configuring a failover system](#)
- [Normal operation and application start-up](#)
- [Automatic failover](#)
- [Manual failover](#)
- [Reverting back to the original configuration](#)



## Zetafax failover - Installing a failover system

---

In order to set up a failover system, you require:

- **A File server**

The file server used with your failover system holds all the files that are used by both your primary and back-up servers. By storing all your files on this separate server, you allow instant access to files by both servers.

**Note:** Please ensure that your file server is backed up on a regular basis. Ideally a RAID (Redundant Array of Independent Disks) system should be setup to enhance the fault tolerance of your system.

- **A Primary Zetafax Server**

Your primary Zetafax Server will send and receive the majority of faxes for your organization.

- **A Back-up Zetafax Server**

Your back-up server will only be activated if your primary server is not functioning for any reason. The back-up server needs to be ready to be activated as soon as its monitoring system detects that the primary server is not functioning.

### Setting up your failover system

1. Make sure that the computers where you intend to set up the failover system are in a single domain.
2. On the file server, you need to create a directory named **Zetafax\_Shared\_Data** and share the directory with full permissions.

**Note:** When naming folders, you should not leave any space in the folder name.

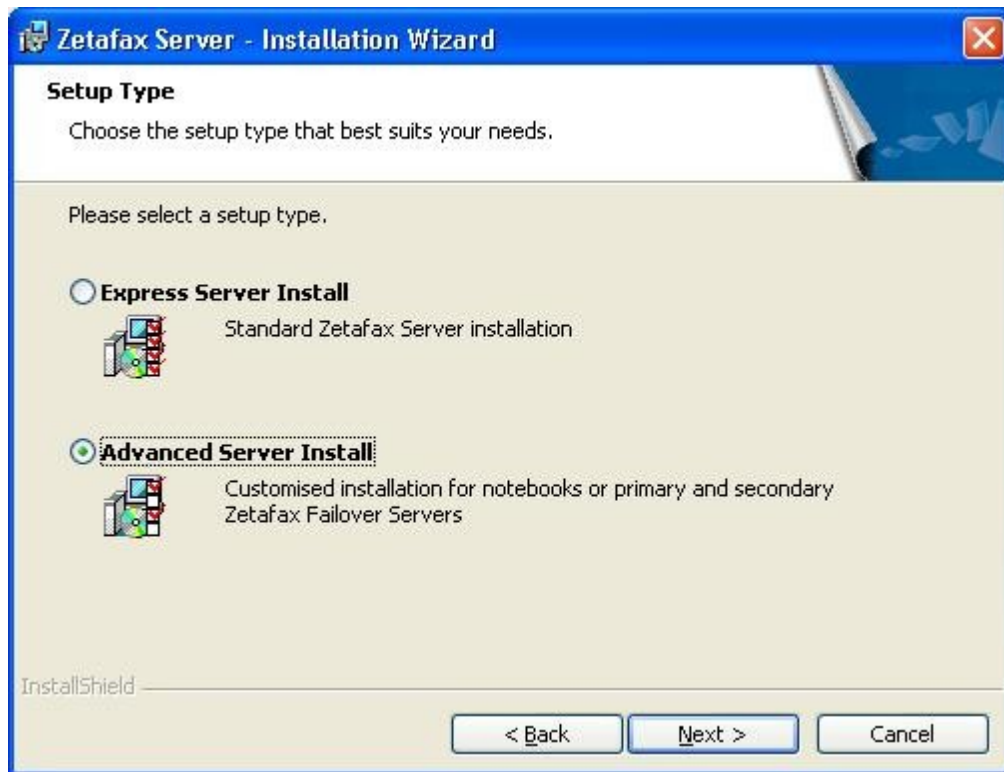
3. Make sure you can access the above created directory from both the Primary Server and Back-up server computers.

### Installation of the Primary Zetafax Server

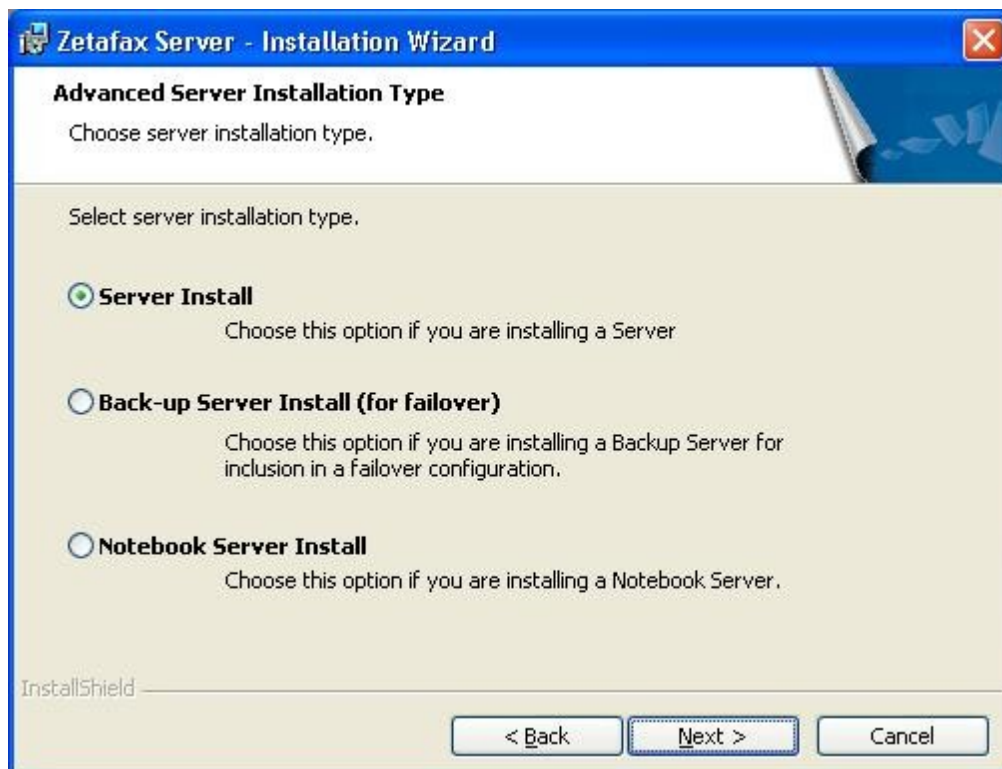
To install the **Zetafax Server** software follow the instructions below:

1. From the CD run the **Zetafax Server Install**.
2. Select Advanced Server Install and click **Next**.





3. On the next screen, select **Server Install** (If you are installing the Primary server) and click **Next**.



4. Accept the **terms of the license agreement** and click **Next**.

5. Enter the **Licence Number** provided with the CD and click **Next**.
6. On the **Server Files** screen, browse to the location where you want to install the Zetafax Server and click **Next**.
7. On the **Shared Data** screen, browse to the shared directory 'Zetafax\_Shared\_Data' on the file server and click **Next**.
8. Click **Install** on the next screen.
9. When prompted with a warning shown below, click **OK** (taking note of the action that may be required).



10. Click **Finish** to finish the installation.

After installing your Server, open the configuration program, and run through the **Configuration Wizard**, this will allow your Zetafax system to operate correctly. For more information on this, please refer to the [Configuration wizards](#) section.

### Additional Instructions

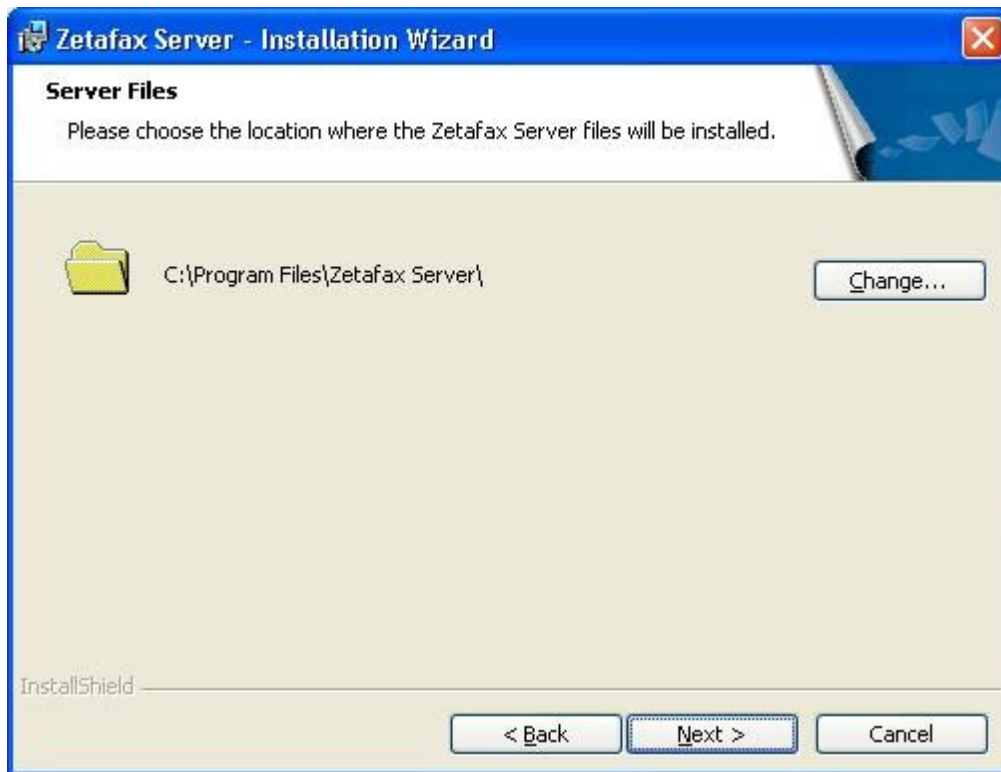
On the Primary Server

1. Copy the **Server** folder located at **C:\Program Files\Zetafax Server** on your local PC, to the **Zetafax\_shared\_files** folder on the shared file system.
2. Open the Zetafax.ini file located at **C:\Program Files\Zetafax Server** and modify the **ServerArea** line so it appears as follows:  
ServerArea: \\<File Server>\Zetafax\_shared\_files\SERVER
3. Start the Zetafax Server as a service and follow the steps below:
  - Select **Run** from the Start menu.
  - Type services.msc in the pop up window and click **OK**.
  - Browse to the Zetafax Server and right click on **Zetafax Server**.
  - Select **properties**.
  - Select the **logon tab**.
  - Select **This account** radio button.
  - Supply the **Username and Password** for a user that has Domain Admin Privileges.
  - Click **OK** and then start the Zetafax Server service.

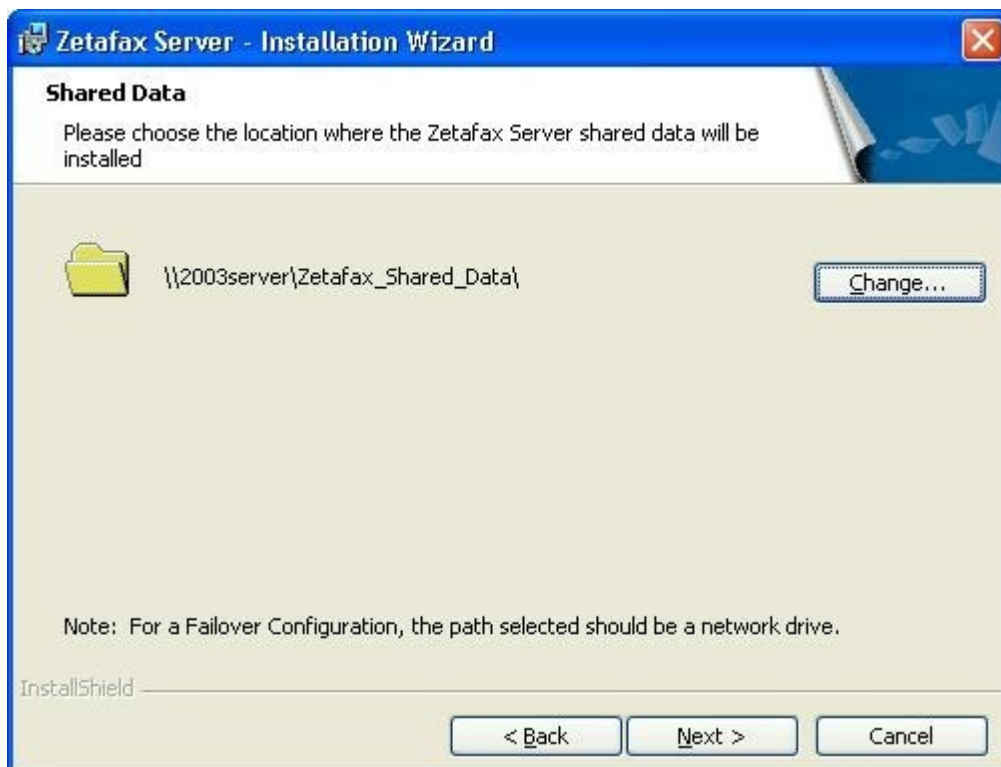
### Installation of the Back-up Zetafax Server

To install the **Back-up Zetafax Server** software follow the instructions below:

1. From the CD run the Zetafax installation
2. Select **Advanced Server Install** and click **Next**.
3. On the next screen, select **Back-up Server Install (for failover)** and click **Next**.
4. On the **Server Files** screen, browse to the location where you want to install the Zetafax Server and click **Next**.



5. On the **Shared Data** screen, browse to the shared directory **Zetafax\_Shared\_Data** on the file server and click **Next**.



6. Click **Install** on the next screen.
7. If prompted with a warning as shown below, click **OK** (taking note of the potentially required action).



8. Click **Finish** to finish the installation.

After installing your Server, open the configuration program, and run through the **Configuration Wizard**, this will allow your Zetafax system to operate correctly. For more information on this, please refer to the [Configuration wizards](#) section.

### Additional Instructions

On the Backup Server

1. Open the Zetafax.ini file located at **C:\Program Files\Zetafax Server** and modify the **ServerArea** line so it appears as follows:  
ServerArea: \\<File Server>\Zetafax\_shared\_files\SERVER
2. Go to Start > Programs > Zetafax > Zetafax tools > Manage Zetafax Server Services.
3. Select **Install and configure Zetafax service** and click **OK**.



4. Select the same Domain Admin account that was used when configuring the Primary Server, supply the Password and click **OK**.



5. Click **Start** on the screen below.

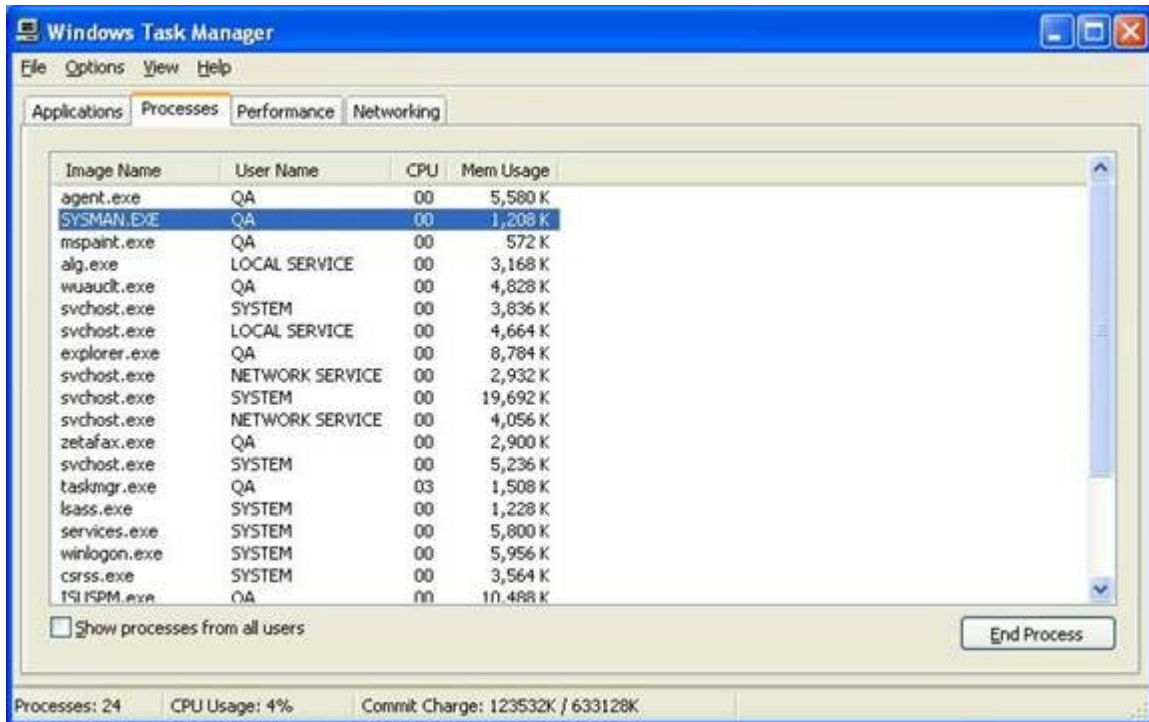


6. During the start-up of the Zetafax Backup Server as a service, you may see the following message:



Please click **OK** to dismiss the message – it is safe to do so. The Zetafax Backup server has a startup delay (by default 5 minutes) built in, so the Operating System will think that the service did not start.

7. To verify that the Backup server has started, start the Task manager and go to the processes tab. SYSMAN.EXE process should be running.



8. When you start the Zetafax Server Monitor on the Backup Zetafax Server, sometimes you might see the dialog below. Please click **OK**. This is a known user interface issue, and can be safely ignored.



## How to set up a Zetafax failover system when upgrading from Zetafax Server 2006 version

Note: If you had archiving enabled in the old Zetafax Server configuration please also back-up the 'SERVER' folder from the old server located at ...\\Zetafax Server\\.

1. Make sure that the computers where you intend to set up the failover system are in a single domain.
2. On the file server, you need to create a directory named 'Zetafax\_Shared\_Data' and share the directory with full permissions.
3. Make sure you can access the above created directory from both the Primary Server and Back-up server computers.
4. Browse to \\...\\Zetafax Server\\ directory and copy the USERS and System directories to a local temp

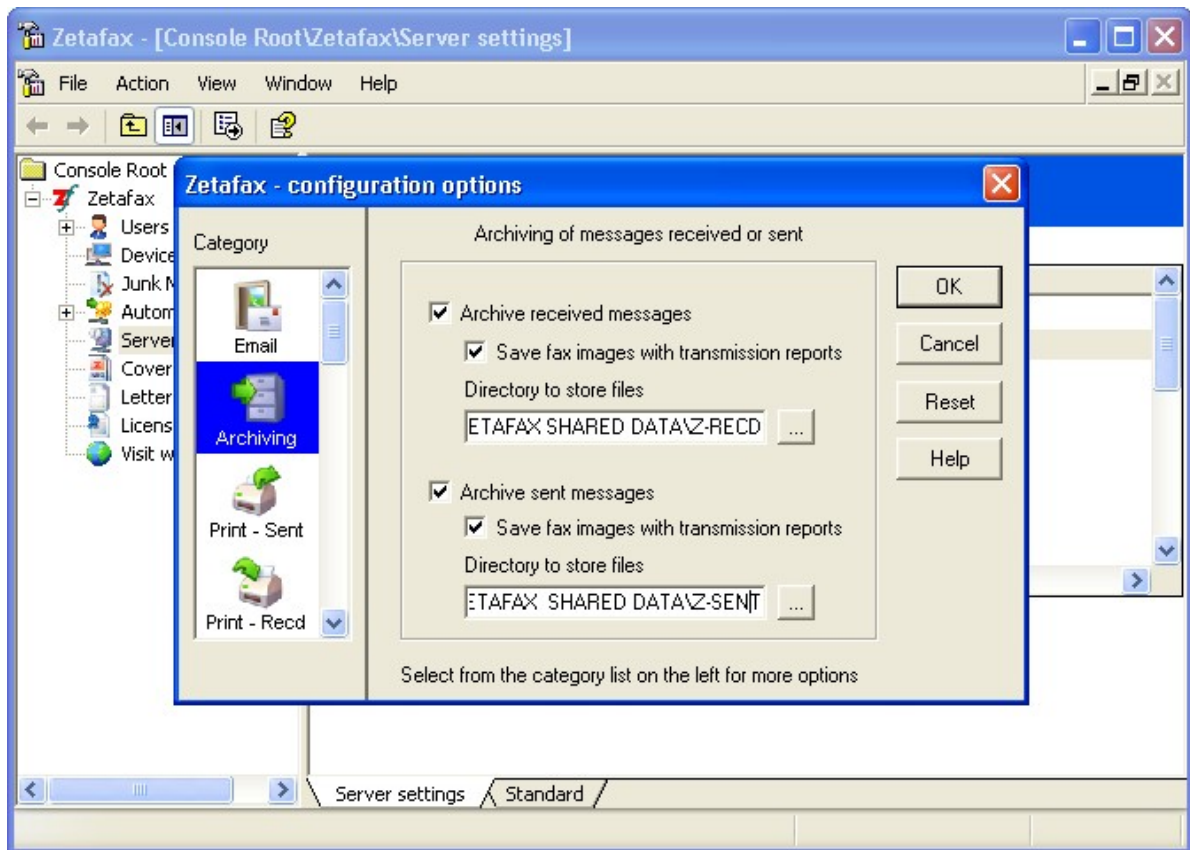
directory.

5. Uninstall the existing Version 2006 server.
6. Install the Zetafax 2012 for failover configuration by following the instructions for the installation of the [Primary](#) and [Back-up](#) Servers.
7. Once the installation is complete, browse to the 'Zetafax\_Shared\_Data' directory on the file server and replace the USERS directory with the backed up USERS directory from the temp location.
8. Browse to the ...\\System\\Z-DB folder in the 'Zetafax\_Shared\_Data' directory on the file server and copy the following files from the backed up ...\\System\\Z-DB folder:
  - COUNTRY.INI
  - USER.INI
  - USERLIST.INI
  - ROUTING.INI (If present)
  - MAILLIST.INI (If present)
9. Browse to the ...\\System folder in the 'Zetafax\_Shared\_Data' directory on the file server and copy the following directories from the backed up ...\\System directory:
  - Z-GRAPH
  - Z-Cover
  - Z-LETTER
10. Configure the devices on both the Primary and the Back-up servers.

Follow the instructions below **only** if you had archiving featured **enabled** in the old Zetafax Server configuration:

11. Back-up the Z-SENT and Z-RECD directories from the ...\\Zetafax Server\\SERVER on the old Zetafax Server.
12. After the failover installation, copy both the directories in the \\<File Server>\\Zetafax\_Shared\_Data directory on the file server.
13. On the primary server, start the Zetafax configuration program and go to server settings and double click on Archiving of messages received.
14. Enable the archiving of received and sent faxes by clicking on Archive received messages and archive sent messages and also change the location to store files to \\<File Server>\\Zetafax\_Shared\_Data\\Z-RECD for received faxes and \\<File Server>\\Zetafax\_Shared\_Data\\Z-SENT for sent faxes as shown below.





**Note:** You might also need to re-enable the email gateway on both the Primary and the Back-up servers.

## Additional Instructions

### On the **Primary Server**

1. Copy "Server" folder located at 'C:\Program Files\Zetafax Server' on your local PC, to the 'Zetafax\_shared\_files' folder on the shared file system.
2. Open the Zetafax.ini file located at 'C:\Program Files\Zetafax Server' and modify the 'ServerArea' line so it appears as follows:  
ServerArea: \\<File Server>\Zetafax\_shared\_files\SERVER
3. Start the Zetafax Server as a service and follow the steps below:
  - Select 'Run' from the Start menu.
  - Type services.msc in the pop up window and click OK.
  - Browse to the Zetafax Server and right click on Zetafax Server.
  - Select properties.
  - Select the logon tab.
  - Select 'This account' radio button.
  - Supply the Username and Password for a user that has Domain Admin Privileges.
  - Click OK and then start the Zetafax Server service.

### On the **Backup Server**

1. Open the Zetafax.ini file located at 'C:\Program Files\Zetafax Server' and modify the 'ServerArea' line so it appears as follows:



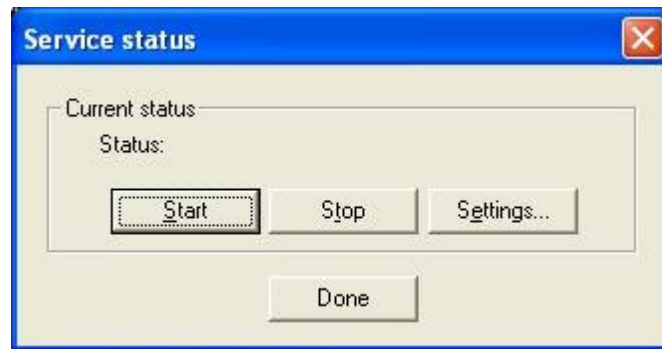
- ServerArea: \\<File Server>\Zetafax\_shared\_files\SERVER
2. Go to Start > Programs > Zetafax > Zetafax tools > Manage Zetafax Server Services.
  3. Select 'Install and configure Zetafax service' and click 'OK'.



4. Select the same Domain Admin account that was used when configuring the Primary Server, supply the Password and click 'OK'.



5. Click 'Start' on the screen below.

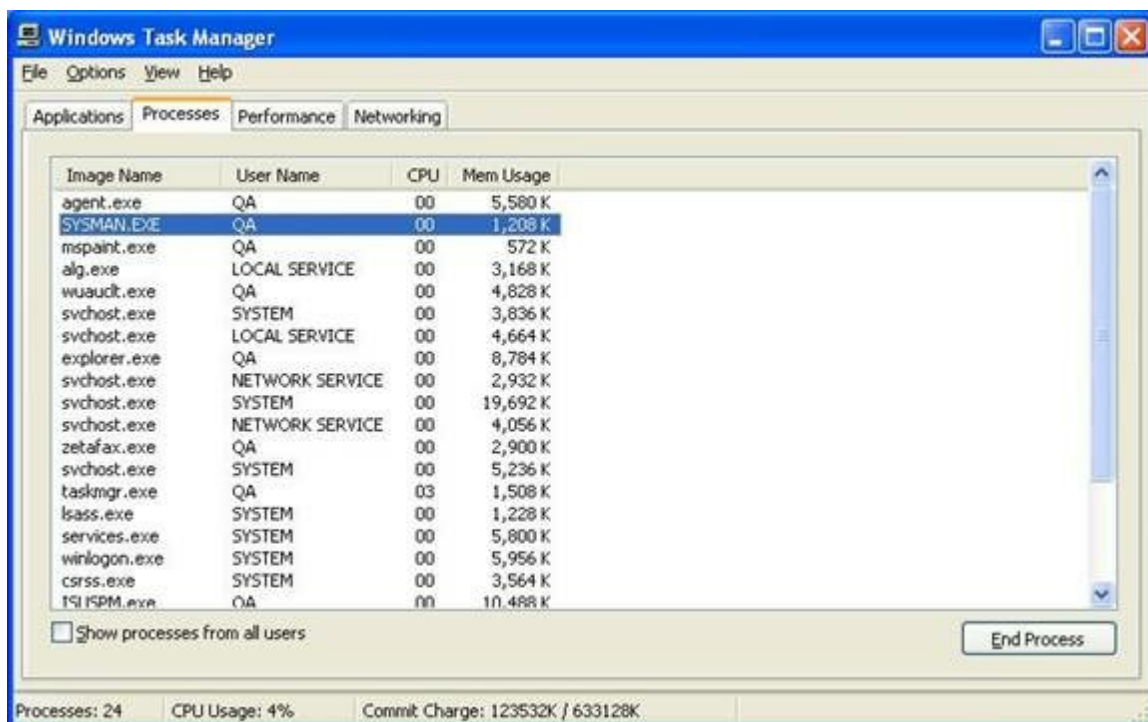


6. During the start-up of the Zetafax Backup Server as a service, you may see the following message:



Please click 'OK' to dismiss the message – it is safe to do so. The Zetafax Backup server has a startup delay (by default 5 minutes) built in, so the Operating System will think that the service did not start.

7. To verify that the Backup server has started, start the Task manager and go to the processes tab. SYSMAN.EXE process should be running.



8. When you start the Zetafax Server Monitor on the Backup Zetafax Server, sometimes you might see the dialog below. Please click 'OK'. This is a known user interface issue, and can be safely ignored.



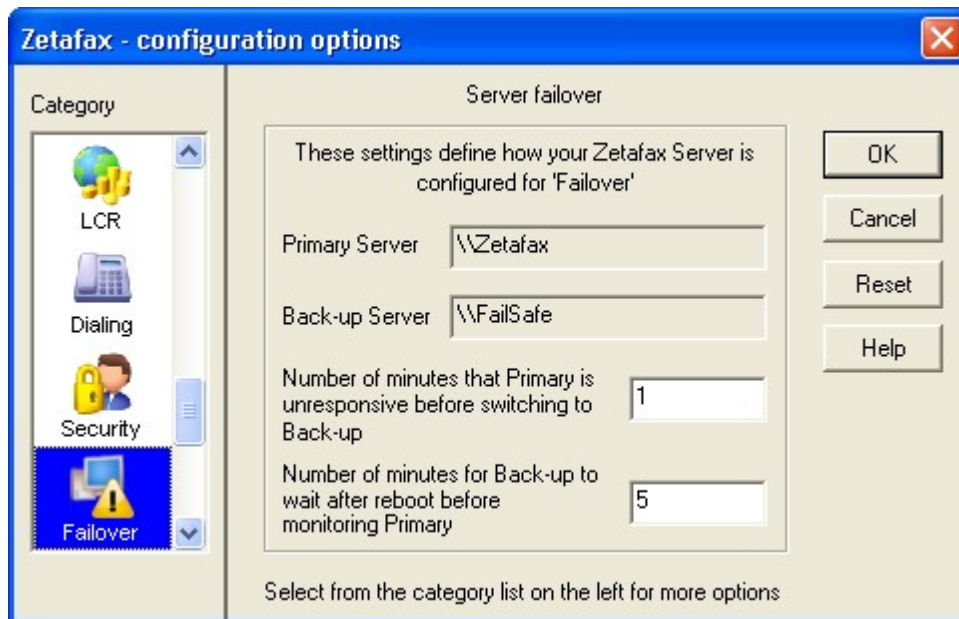
**Related Topic:**  
[Installing a failover system](#)



## Zetafax failover - configuring a failover system

Having installed your failover system, you will need to adjust your failover configuration to match your needs.

1. Open your **Zetafax configuration** program.
2. Open the **Server failover** screen, found within the **Server Settings**:



3. From here you can:
  - Check your primary and back-up server locations
  - Set the number of minutes your primary sever can be unresponsive before starting the back-up system
  - Set the number of minutes your back-up server should wait on start up before monitoring the primary server

### Checking your server locations

At the top of the Configuration Options - Server failover screen, the names of both your primary and back-up Servers are displayed. If at any time you need to change these locations, you will need to modify your **Setup.ini** file following the instructions in the [installing a failover system](#) section.

### Setting the check time

The check time, is the number of minutes the back-up server will wait before checking that the primary server is active.

The default setting for the check time is 2 minutes, but by modifying this number you can change this frequency to anywhere between 1 and 30 minutes. The more frequent these checks, the quicker your back-up server will be activated in the case of issues with your primary server. However, increased check times may lead to marginally decreased server productivity.

### Setting the back-up standby time

In some situations, for example power failure, both your primary and back-up server may restart at the same time.

The back-up standby time is a method of preventing the back-up server from activating immediately on

start up, to allow the primary server enough time to restart and activate Zetafax.

The default setting for the check time is 5 minutes, but by modifying this number you can change this frequency to anywhere between 5 and 20 minutes. The more frequent these checks, the quicker your back-up server will be activated after a restart.

**Note:** For both the check time and the standby time, if no value or a number outside the range has been added, the default value will be used.



## Zetafax failover - normal operation and application start-up

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Once your system is set up

Having set up and configured your system for failover, it is important to test both servers are working correctly both immediately after setup and at regular intervals.

At the very least, the following maintenance routine should be followed once every six months.

On the **Primary Zetafax Server** check for updates to your server, using the **Check for Updates** option found on the **Help** menu of your **Zetafax Server Console**.

If any updates are found, the steps below should be followed:

### Applying updates to a failover system

1. All available updates should be downloaded to a convenient location for use (for example on the desktop).
2. On the **Back-up Zetafax Server** select the **Go Active** option from the **Options** menu.

You will be prompted with the following message:

```
'Are you sure you wish to shutdown the Primary Server (<<Primary Zetafax Server machine name>>)
and continue processing on this machine (<<Back-up Zetafax Server machine name>>)?'
```

3. Select **OK** and your **Primary Zetafax Server** will close down.
4. Open each update and apply to your **Primary Zetafax Server** following the instructions in the related technotes.
5. When all updates have been applied, close down the **Back-up Zetafax Server**.
6. Restart the **Primary Zetafax Server** and ensure that all services are functioning normally.
7. Apply the updates to the **Back-up Zetafax Server** and then restart it.



## Zetafax failover - automatic failover

Once your system is correctly configured, your Zetafax system will automatically start using your Back-up Zetafax Server as soon as it detects that the primary Zetafax Server is no longer functioning.

There are several ways that you can tell that your Back-up has replaced your **Primary Zetafax Server**:

- The **Back-up Zetafax Server Monitor** will stop displaying a (Passive) message
- On startup, the **Back-up Zetafax Server** will post a message to the server.log:

'Back-up Server now handling all messages'

- On startup, the **Back-up Zetafax Server** will post a message to the application event log:

'Back-up Server now handling all messages'

- Every 15 minutes, a message from the **Back-up Zetafax Server** will be posted to the server.log:

'Back-up server is currently active and handling all messages'

It is important, having noticed that an automatic failover has occurred, to determine the reason behind your system failure. To do this, check the server.log on your Primary Zetafax Server for error messages.

Once you are sure that your system is stable, follow the instructions on how to [revert back to the original configuration](#).



## Zetafax failover - manual failover

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There are several reasons why a manual failover of your Zetafax system might be necessary:

- Routine Maintenance
- Addition of extra software
- Addition of extra hardware
- Testing of your failover system

To manually failover your system follow these steps:

1. On the **Back-up Zetafax Server** select the **Go Active** option from the **Options** menu.

You will be prompted with the following message:

```
'Are you sure you wish to shutdown the Primary Server (<<Primary Zetafax Server machine name>>)
and continue processing on this machine (<<Back-up Zetafax Server machine name>>)?'
```

2. Select **OK** and your **Primary Zetafax Server** will close down.

**Note:** If you want for any reason to shut down both your Primary Zetafax Server and your Back-up Zetafax Server you must close down your Back-up server first.





## Zetafax failover - reverting back to the original configuration

---

When you are ready for your system to revert the original configuration follow these steps:

1. Ensure that all users are logged out, and that no faxes are queued to be sent.
2. Shut-down your **Back-up Zetafax Server**.
3. Start your **Primary Zetafax Server**.
4. Ensure that your **Primary Zetafax Server** is operating normally and has fully initialized.
5. Restart your **Back-up Zetafax Server**.
6. Ensure that your **Back-up Zetafax Server** has started in '**Passive**' mode.



## cover sheets, letterheads and attachments

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Zetafax allows you to create and use your own [cover sheets](#), [letterheads](#) and [attachment files](#) which can then be added to your faxes to help maintain your corporate identity.

When you first install Zetafax you will find that a number of samples of each file type have been provided for you, this is to help you to get started using Zetafax. It is worthwhile taking the time to set up your own versions of these files which can then be used by all Zetafax users across your network.

Select one of the topics below for further instructions on how to do this:

[Creating a cover sheet](#)

[Creating a letterhead](#)

[Creating a document attachment](#)

### cover sheets

A cover sheet provides the fax recipient with information about the fax they are receiving. It is usually the first sheet of a fax that gets sent, and contains information both for the recipient and also to help the fax reach its destination.

Each cover sheet consists of two files: a foreground file which contains text which is different for each fax (such as the name and organization), and a background file, containing fixed information such as the company logo. The background file is optional, and can be omitted if all the fixed information is in the foreground file.

Cover sheets are stored in the SYSTEM\Z-COVER sub directory of your Zetafax home directory. The foreground is stored and is given an extension of .EPN. The background is a graphics file, with extension .G3F for fine mode faxing, or .G3N for standard mode.

[Click here for instructions on how to create your own cover sheets](#)

### Letterheads

Each letterhead for use with Zetafax is stored as a multi page graphics file, in the SYSTEM\Z-LETTER sub directory.

When sending a fax, the pages of the document being sent are merged with the letterhead pages in order (as when you print a document onto letterhead and continuation paper). If there are more pages in the document file than in the letterhead, the last page of the letterhead is used for all remaining pages.

Most companies have letterhead paper (with their address and logo) for the first page of letters, and continuation paper (with just a logo, or perhaps blank) for all other pages. To mirror this with Zetafax the letterhead file should contain two pages, with the letterhead sheet as the first page and the continuation sheet as the second.

### Attachment files

Attachment files are multi page graphics files which can be added to the end of a fax being sent.

There are two types of attachment files: system attachments, which are available to all users, and private attachments which can only be used by a given user. System files are stored in the C:\Program Files\Zetafax Server\SYSTEM\Z-GRAPH directory, while private files are stored in each user's graphics sub

directory USERS\\{\i username} \\Z-GRAPH.

Any document or image which you could send as a fax, or any received fax, can be saved as an attachment file. This includes images in any of the supported graphics formats (TIFF, DCX, PCX, etc.) as well as any word processor or text file.

### Resolutions used

You can send faxes at two different resolutions: standard mode (200 x 100 dpi), and fine mode (200 x 200 dpi). Usually graphics files for sending - letterhead, cover sheet backgrounds and attachment files - are stored in one resolution only, and Zetafax converts formats automatically if sending at a different resolution.

Most Zetafax systems are configured to send faxes at the higher resolution (fine mode), and this is the default setting if you specify **Normal** as the resolution unless the network administrator has used **Zetafax Configuration** to alter the system default. Therefore it is usual to store fine mode versions of the graphics files only, and the instructions in the sections below tell you how to do this.

However, if you wish, you can create separate versions of the files for the two different resolutions. Although rare, you might do this if you send at both resolutions, and want to fine tune the lower resolution version of the file to improve the image quality, or to reduce the preparation overhead in converting between formats. The different versions have the same file name, but with an extension of .G3N for standard mode and .G3F for fine mode versions.

### Using cover sheets, letterheads, or attachments

The next section explains how to create custom cover sheets, using the cover sheet Editor provided with Zetafax. You can also create a letterhead or attachment file by faxing the document and then saving the fax preview in an appropriate format; for more information, see [Faxing a cover sheet, letterhead, or attachment](#).

#### Related topics

[The cover sheet Editor](#)

[Using letterheads](#)

[Faxing a cover sheet, letterhead, or attachment cover sheets](#)

[Add new cover sheet](#)

[Letterheads](#)

[Add new letterhead](#)

[Letterhead file](#)



## Creating a cover sheet

Before creating your own cover sheet, it is important to give some thought into what you wish your cover sheet to look like. If you have a company logo, and would like to display this on your cover sheet, you will need a copy of this either in graphical form or on paper if you possess a scanner.

Personalized cover sheets can help your business identity. Allowing you to increase awareness of your corporate branding without incurring any extra costs.

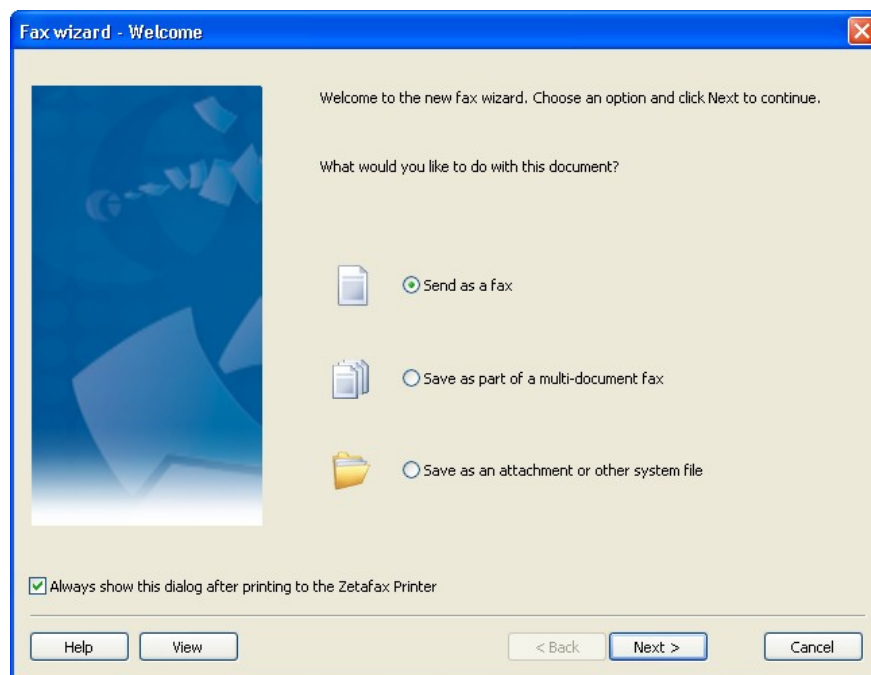
**Note:** cover sheet creation can only be done by users that have **Administrator** status.

cover sheet Creation is done in two stages. This allows you to add both background data such as images, lines and words that you do not intend to change on a fax to fax basis and also foreground data such as fax addresses, names and dates that will differ for each fax.

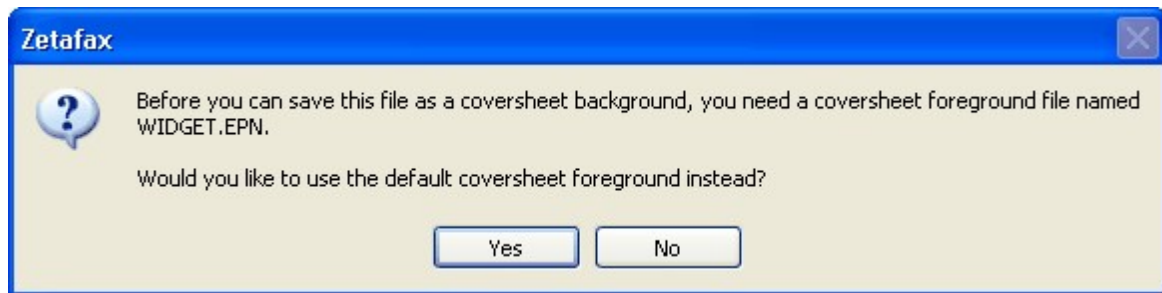
### Create the cover sheet background file

1. Open Word.
2. Add your corporate logos, and design the layout for the background of your cover sheet.
3. Print your document to the **Zetafax Printer**.

The **Zetafax Client** will open and the **Fax Wizard** will be displayed:



4. Choose the **cover sheet, letterhead or attachment file** option.
5. Select the **cover sheet background - optional** checkbox.
6. Provide a name for your cover sheet within the **File name** text box.
7. Add a description in the **Description** text box.
8. Select the **OK** button to save the background of your cover sheet.



9. Select Yes to add variable fields to your fax form.

### Create the cover sheet foreground file

1. Open the cover sheet editor program.
2. Open the cover sheet you wish to modify, or select **New** to create a blank cover sheet or use one of the standard cover sheet templates.

### Add a text field

Adding a text field allows you to add information to your cover sheet that is going to remain the same between faxes.

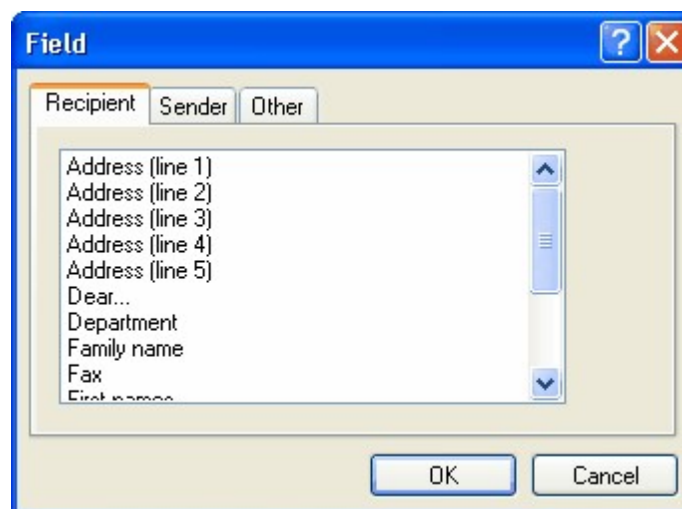
1. Click on the **Insert Text** button:
2. Choose where on your fax you would like this information to appear, and click the left button on your mouse.
3. Type the text you want to add.

### Add a merge field

Adding a merge field to your cover sheet allows you to add fields that will personalize your cover sheet.

1. Click on the **Insert Field** button:

The Field menu will be displayed:



2. Select the field you would like to add to the cover sheet.
3. Choose where on your fax you would like this information to appear, and click the left button on your mouse.

Your field is now added to your cover sheet.

### Insert a line

One or more lines can be added to your cover sheet to separate sections.

1. Click on the **Insert Line** button:
2. Draw your line by holding down the left button on your mouse and moving the mouse till you get a line of the desired size.

Your line is now added to your cover sheet.

#### **Insert a box**

Boxes can be added to your cover sheet to allow information such as any notes you may wish to be add to be separated from the rest of the information on the cover sheet.

1. Click on the **Insert Box** button:
2. Draw your box by holding down the left button on your mouse and moving the mouse till you get a box of the desired size.

Your box is now added to your cover sheet.

#### **Editing your cover sheet**

Having added fields to your cover sheet, these can be edited using the **cover sheet Editor** at anytime.

Having loaded the cover sheet you wish to edit into the **cover sheet Editor** you can:

##### **Edit text**

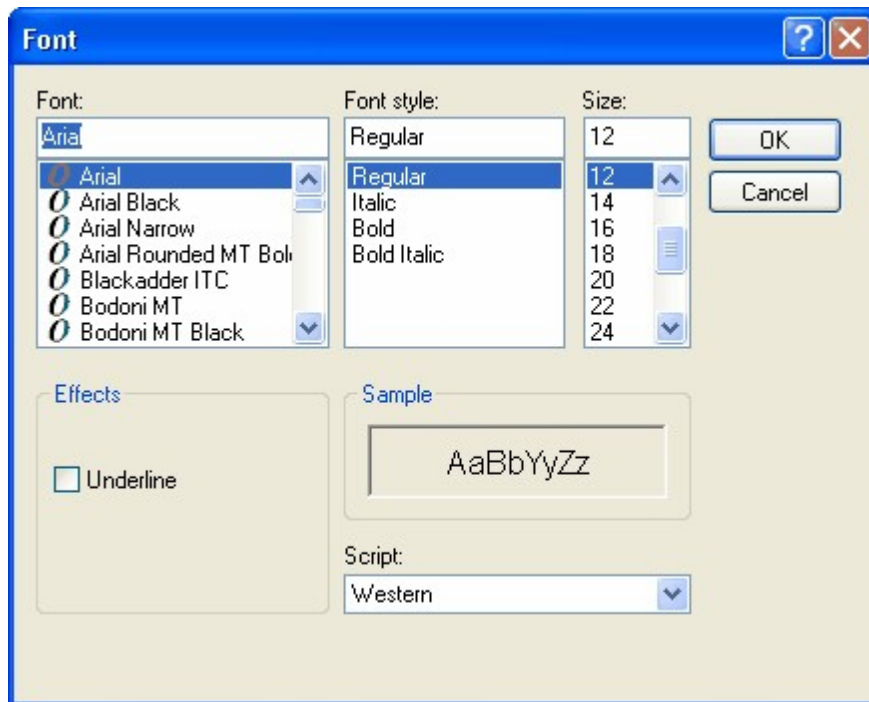
Any text fields added to your cover sheet can be changed by selecting them with you left mouse button. This will move your cursor to the field and allow you to add, delete or change text as required.

##### **Format text**

By clicking the right button of your mouse over any text or fax field, you will be given options to edit the formatting of that text. You can:

- Change the font.
- Edit the text or change the fax field.
- Justify the text or fax field.
- Delete the item.

If you choose to change the font, the following menu will be displayed:



This allows you to change the appearance of your selected text.

#### Move fields

All fields can be moved by selecting them with your left mouse button and either dragging them or using the arrow keys on your keyboard.

#### Change line thickness

For both lines and boxes that have been added you can change the thickness of lines by clicking the right button of your mouse on the object and selecting the **Properties** option. This will provide you with a **Properties** menu for that item, allowing you to change the line thickness. In addition, you can add a shadow to any boxes you might have added.

#### Saving your cover sheet

Having created a cover sheet you are happy with, simply select the **Save As** option from the **File** menu and provide a name and description of your cover sheet. You can now use your cover sheet the next time that you send a fax.



## Creating a letterhead

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### Using a word processor

If you have the letterhead available in a word processor or other application program, this will generally give the best results.

- With the server and client running, print the document using the Zetafax printer driver.

After a short time the Zetafax Addressing window will appear.

- Click **Save As** then click **cover sheet, letterhead or attachment file** and then click **OK**.

This will display the **Save as system file** dialog.

- Select **Letterhead background - letterhead and continuation**.

The option will be disabled if the Zetafax printer driver was set to the wrong format before printing or if you have not correctly followed the instructions above.

- In **Filename**, enter a filename without any extension (e.g. LETTHEAD if you want to overwrite the default file), and a short description to help users.
- Click **OK**.
- The letterhead will be created.





## Creating shared document attachments

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In order to allow all Zetafax users to access an attachment, they need to be stored in a suitable format in the shared document folder.

Any document or image which you could send as a fax, or any received fax, can be saved as an attachment file. This includes images in any of the supported graphics formats (TIFF, DCX, PCX, etc.) as well as any word processor or text file.

When you have a document you wish to allow other users to access, simply save it to the C:\\Program Files\\Zetafax Server\\SYSTEM\\Z-GRAPH directory.



## The cover sheet Editor

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The Zetafax cover sheet Editor allows you to create and edit a cover sheet in a single window. It works in a similar way to desktop publishing applications, so many of its features should be familiar to most users.

The cover sheet Editor allows you to import image files, such as a company logo, position and resize them, and overlay text and field objects. In addition, you can add boxes and lines to further enhance the presentation.

### Foreground and background files

Zetafax cover sheets consist of two files: a [foreground](#) file which contains text which is different for each fax (such as the name and organization), and a [background](#) file, containing fixed information such as the company logo. The background file is optional, and can be omitted if all the fixed information is contained in the foreground file.

When you save the changes you make to your cover sheet design, the cover sheet Editor creates two separate files. The foreground is stored and is given an extension of .EPN. The background is a graphics file, with extension .G3F for fine mode faxing, or .G3N for standard mode.

### Running the cover sheet Editor

To run the cover sheet Editor: Launch the **Zetafax client** program (**Start** menu, **Programs** submenu, **Zetafax** submenu). On the **Tools** menu, click **cover sheet Editor**.

Zetafax users must be assigned administrator privileges in order to create cover sheets. Refer to [User edit - permissions](#) for more information.

Alternatively, the network administrator can launch the cover sheet Editor using the **cover sheets and Letterheads** option in the **Zetafax Configuration** program, ZFSETUP.

1. Launch the **Zetafax Configuration** program (**Start** menu, **Programs** submenu, **Zetafax** submenu).
2. In the left pane, double-click the **Zetafax** folder, and then click **cover sheets**.
3. On the **Action** menu, click **Add**.

When you first run the cover sheet Editor you are prompted whether you wish to create a new cover sheet or open an existing cover sheet. The installation process installs some example cover sheets. The simplest way of creating a custom cover sheet is to modify one of the examples, and to replace the background with your company logo or letterhead.

### Creating a new cover sheet

To create a new cover sheet from within the cover sheet Editor:

1. On the **Zetafax Tools** menu, click **cover sheet editor**.
2. You will then be prompted to select one of the installed cover sheet templates. Ensure **New blank cover sheet** is selected. Click **OK**.

The cover sheet Editor window will be displayed, showing the new cover sheet as a blank page.

### Creating the background file

The first stage in creating a new Zetafax cover sheet is to create the cover sheet background file. This will make it easier to insert foreground objects later.

The cover sheet background file is similar to a company letterhead. It is stored as a TIFF FAX format

graphics file, and contains the fixed part of the cover sheet, like a company logo and address of the sender.

As background files are an optional component of the Zetafax cover sheet, you can skip this section if you do not wish to use a background file, and go straight to the section [Creating the foreground file](#).

To edit the background file:

- On the **View** menu, click **Edit Background**.

When you switch to editing the background file, any foreground objects you have already inserted will appear grayed and you will be unable to select or change them.

When editing the background file, you can insert bitmap images as well as cut, move, or resize areas of the graphics file.

### Inserting bitmaps

To insert a bitmap:

- On the **Insert** menu, click **Bitmap...**

You will be prompted for the file to insert.

You may insert a Windows bitmap file (.BMP) or any Zetafax format TIFF files (.G3N or .G3F).

- Browse to the file you wish to insert and click **Open**.

The mouse cursor will change to a + cross-hair to allow you to position the image.

- If you want a 3D shadow or watermark effect, click the **Effects** menu item of your choice.
- Drag the selected bitmap to the required position.

**Note:** If you attempt to insert a color bitmap file, the cover sheet Editor will try to dither the colors to gray scales. For best results you should convert color bitmap images to gray scale bitmap images prior to importing them into the cover sheet Editor.

### Creating the foreground file

To edit the foreground file:

- On the **View** menu click **Edit Foreground**.

**Note:** When you open the cover sheet Editor, you will initially be in edit foreground mode.

When you switch to editing the foreground file, any background objects such as bitmap images you have already inserted will appear grayed and you will be unable to select or change them.

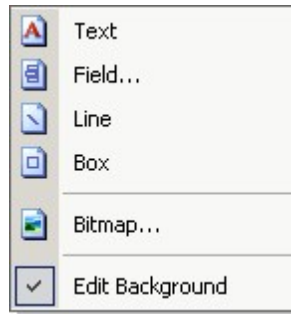
Foreground objects are used for the variable information which is different for each fax sent, such as the name and organization of the recipient. The cover sheet Editor also includes other objects such as text lines and boxes as foreground objects. When using the cover sheet Editor, foreground objects appear as 'floating' objects above the background TIFF image.

When you save changes to your cover sheet design, these objects are saved in the foreground file.

To insert a Text, Field, Line or Box object:

- On the **Insert** menu, click **Text**, **Field...**, **Line**, or **Box**.

Alternatively, you may insert an object using the toolbar or the pop-up menu which is displayed on a right-hand mouse click.



**Note:** The bitmap object may only be used while editing the background file. If you are currently editing the foreground file and select **Bitmap**, the cover sheet Editor will prompt you whether you wish to switch to editing the background file.

The following sections describe object insertion in more detail.

### Inserting text

To insert text:

- On the **Insert** menu, click **Text**.
- Click the position on the page at which you want the text.
- Type the text.
- If you want to insert a further line of text aligned below the first, press the **Enter** key and type the text.
- If you want to reposition any item, click on the text and drag the shaded outline box to the new position.

### Formatting text

The first time you insert text using the insert text command, the cover sheet Editor uses the 12pt Arial typeface. To change the typeface you use or the appearance of the typeface used in text and field objects:

- Click the object you want to format.
- On the **Format** menu, click **Font**.
- Make the required changes.
- Click the **OK** button.

The cover sheet Editor will remember and use the new typeface and style you have selected for subsequent text and field objects.

### Inserting a field

To insert a field:

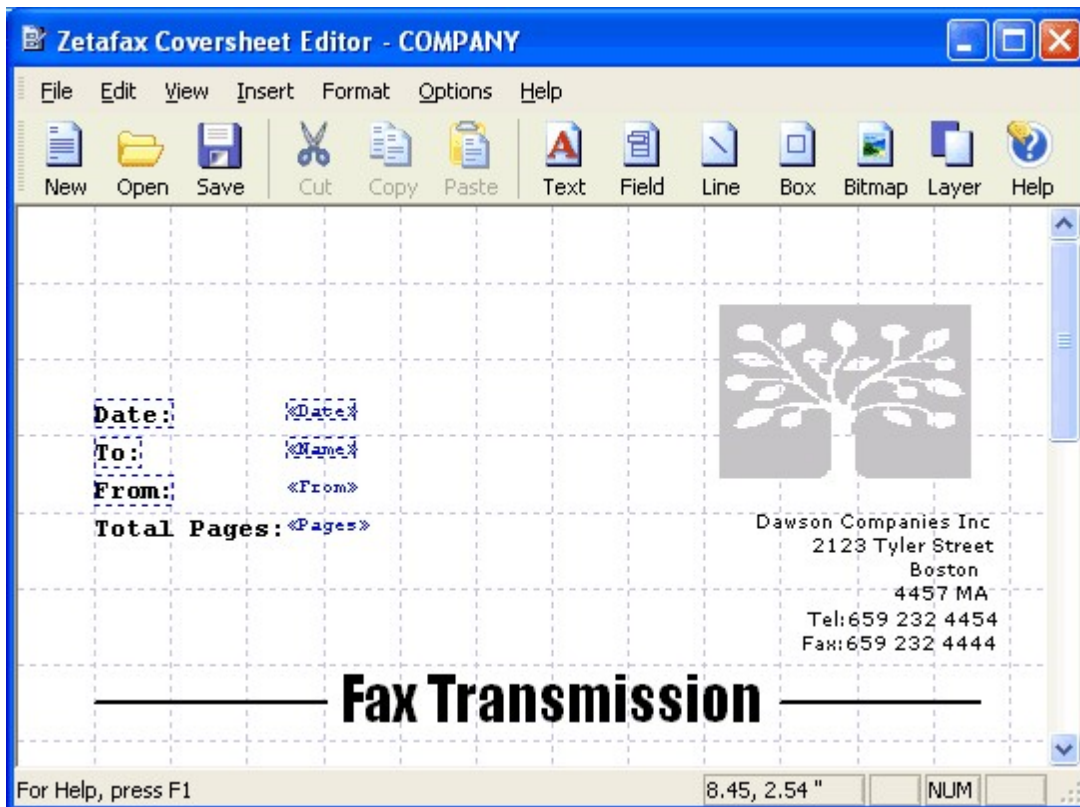
- On the **Insert** menu, click **Field**.

The cover sheet Editor displays a tabbed dialog to allow you to select from the available fields.

- Click the tab corresponding to the type of field you wish to insert.
- Click the type of field you wish to insert.
- Click **OK**. Click the position on the page at which you want the field.

The **Note** field behaves slightly differently from the other fields and is described separately below.

You may change the formatting and style of cover sheet fields. If you choose to format a cover sheet field using a non-standard typeface, you must ensure that this typeface is installed on the Zetafax Server computer which is responsible for generating the cover sheet.



### Aligning text

cover sheet field objects appear in blue text in the cover sheet Editor and they will normally appear alongside some descriptive text you have already inserted. When a fax is actually sent the field text will be replaced with real values which are meaningless unless they are qualified with such descriptive text.

For example, the field **Full Name (Recipient tab)** will be replaced by the name of the addressee as entered in the Zetafax client. It is advisable to use descriptive text such as the word "To" in order to identify the recipient clearly on the cover sheet.

To make this task simpler, the cover sheet Editor allows you to select multiple cover sheet fields and align them along one of their borders.

To align fields:

- Click a foreground text field.
- Hold down the **Shift** key and click one or more additional fields.

The fields you have selected will appear with a dotted line as a border.

- Drag the selected fields to reposition them on the page.

Once you have positioned the fields:

- On the **Format** menu, click **Align** and then the menu item of your choice.

### Note fields

A cover sheet **Notebox** field (**Other** tab) is a special type of field used to insert cover sheet notes which may span several lines of cover sheet text.

Once you have placed the field, you can select one of the edges and drag it to resize the box. The box may be as large or as small as you like; however as a typical cover sheet note may contain up to 10 lines or

more of message text, it may be sensible to be as generous as possible.

### Inserting lines and boxes

The Zetafax cover sheet Editor allows you to insert lines and boxes to make the appearance of your cover sheet more professional. You may wish to insert a line to separate cover sheet text from your company address details, or insert a box to enclose the sender's or recipient's contact details.

To insert a line or box:

- On the **Insert** menu, click **Line** or **Box** .

The mouse cursor changes to a + cross hair to allow you to select a position for the object.

- Drag on the page to specify the start and end positions of the object.

### Formatting drawing objects

To further enhance the look of your cover sheet design, you can modify the appearance of a drawing object:

- Click the object you wish to modify.
- Resize or reposition the object by dragging one of its edges.

To change the object's properties:

- On the **Format** menu, click **Properties...** .
- In the properties dialog that appears make any changes you require.
- Click **OK**.

### Further features

Like most desktop publishing or word processing applications, the cover sheet Editor lets you change the view of the working area. This is controlled by the **View** menu:

- To display the page at 1:1, click **1:1**.
- To display the page in the full window width, click **Fit to Width**.
- To display the whole page in the window, click **Whole Page** .

The cover sheet Editor is capable of supporting several different page sizes. A4, US Letter, and US Legal page sizes may be selected from the Page setup command (File menu). In addition, custom page sizes may also be specified.

To set a specific page size as the default page size for all new cover sheets:

- On the **File** menu, click **Page Setup**.
- Check the **Set as default** check box.

By default, the cover sheet Editor uses inches as the units of measurement. When the mouse cursor is positioned over the working area, the exact (X,Y) location is displayed in the status bar. You can change the units of measurement to centimeters or pixels by clicking **Settings (Options menu)**.



## Using letterheads

### Letterhead file

Each letterhead for use with Zetafax is stored as a multi page graphics file, in the C:\Program Files\Zetafax Server\SYSTEM\Z-LETTER directory.

The pages of the document being sent are merged with the letterhead pages in order (as when you print a document onto letterhead and continuation paper). If there are more pages in the document file than in the letterhead, the last page of the letterhead is used for all remaining pages.

Most companies have letterhead paper (with their address and logo) for the first page of letters, and continuation paper (with just a logo, or perhaps blank) for all other pages. To mirror this with Zetafax the letterhead file should contain two pages, with the letterhead sheet as the first page and the continuation sheet as the second.

### Print setup

Ensure that the word processor letterhead has your continuation paper (or a blank sheet) as its second page. Configure the Zetafax printer using the following procedure:

#### Windows 2003 or later

- Within the word processor program on the **File** menu, click **Print....**
- Set the **Printer Name** to **Zetafax Printer**.
- Click **Properties**.
- Click the **Advanced** tab.
- In the upper list, under **Graphic**, click **Resolution**.
- In the lower list, click **Fine Fax** (204 x 196 dpi).

### Using a word processor

If you have the letterhead available in a word processor or other application program, this will generally give the best results.

- With the server and client running, print the document using the Zetafax printer driver.

After a short time the Zetafax Addressing window will appear.

- Click **Save As** then click **cover sheet, letterhead or attachment file** and then click **OK**.

This will display the **Save as system file** dialog.

- Select **Letterhead background - letterhead and continuation**.

The option will be disabled if the Zetafax printer driver was set to the wrong format before printing or if you have not correctly followed the instructions above.

- In **Filename**, enter a filename without any extension (e.g. LETTHEAD if you want to overwrite the default file), and a short description to help users.
- Click **OK**.
- The letterhead will be created.



## Faxing a cover sheet, letterhead, or attachment

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If you do not have a word processor version of your file, you can still create a new Zetafax cover sheet background image, letterhead, or attachment simply by sending from another fax machine (effectively using the other fax machine as a scanner).

- Ensure that you are logged in to the Zetafax Client as the user you have configured to receive incoming faxes.
- From another fax machine send Zetafax your file and continuation paper as a two page fax, in **Fine** resolution.

You should get a notification that a new fax has been received, and see an entry for the new fax in your **In** window.

- Select the entry, then click **View** (**File** menu) to check it has been received correctly.

The file resolution (displayed on the status bar) should be 200 x 200 dpi - otherwise you should resend it in **Fine** mode.

- Exit the viewer by clicking on **Exit** (**File** menu).
- Quit from view, then choose **Save as** (**File** menu) to save the file.
- Continue as described above to use the file.

You may wish to tidy up the file, for example to remove any transmission specks from it. You can do this by viewing it (either in the C:\Program Files\Zetafax Server\SYSTEM\Z-LETTER directory or while still in the **In** window), exporting it to another graphics format file, tidying it using an image editing program such as Paint, then importing it again into the Zetafax viewer.





## Automatic inward routing

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Zetafax can use a number of methods for delivering received faxes automatically to their intended recipient. These include giving each user their own fax number, or specifying that all faxes from a given company should be sent to a particular user.

These topics describe the various techniques used, explaining any specific hardware requirements, and explains how to configure and use the different methods.

### **Related topics**

[Automatic routing options](#)

[Sub-address routing](#)

[Sender ID routing](#)

[Automatic forwarding](#)

[Hardware requirements](#)

[Software configuration](#)

[Use from the Zetafax client](#)

[Automatic inward routing dialog](#)

[Server settings](#)



## Automatic routing options

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### Routing types

When you add a new fax line to a Zetafax Server you specify the user to receive incoming faxes. This is the person who is notified when faxes are received without any specific information about for whom they are intended. The person who is notified can view the new faxes then either print them or forward them to the correct user, using the Zetafax Client menu commands **Forward** (**File** menu) or **Forward to mail** (**File** menu). This is called manual routing.

There are three types of automatic inward routing which are configured and used independently:

#### Sub-address routing

This is the most direct type, in which the sender identifies the recipient directly, for example by dialing a specific fax number. Zetafax supports four different methods of sub-address routing, as described in the [Sub-address routing](#) topic.

#### Sender ID routing

This looks at who sent the fax to determine the intended recipient.

#### Automatic forwarding

In this type of routing all faxes for a specific user will be forwarded to another user. This might be used when someone is sick or away on vacation.

Each of these types are explained in greater detail in the following sections.

**Note:** Some of the routing types require additional hardware and software options to be purchased.

#### Related topics

[Sub-address routing](#)

[Sender ID routing](#)

[Automatic forwarding](#)

[Hardware requirements](#)

[Software configuration](#)

[Use from the Zetafax Client](#)



## Sub-address routing

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Sub-address routing is the most direct of the automatic routing methods available, allowing the sender to specify the intended recipient directly. There are four different methods of doing this.

### DID routing

Many companies already have a phone system (PBX) where each extension can be dialed directly from outside the company, rather than having to go via the switchboard. The technology behind this is called Direct Dialing Inwards (DDI) or Direct Inward Dialing (DID), and is as applicable to fax as it is to voice calls.

This is the most direct of the inward routing methods. Each user is given their own fax number - not a separate fax line, just their own number. Faxes sent to that number are routed directly to the user.

The number of fax *numbers* allocated is independent of the number of fax *lines* on your Zetafax system - all you do is define a table of fax numbers, giving the Zetafax user account corresponding to each one.

If your phone system supports DDI/DID for telephone calls already, it can probably be configured simply to allow DDI/DID for fax. If you do not already have DDI/DID you can install a separate digital telephone line (ISDN) or analogue DID telephone line to support it just for fax. Details of both these methods are given below.

### DTMF routing

The method Zetafax uses for DDI/DID routing is to recognize DTMF tones sent to the Zetafax Server just after it answers the call, telling it what number was dialed. These are the musical tones generated by modern phones when the number keys are pressed.

Even without giving each user their own fax number, you can still get the same effect by getting the sender to key in extra digits after Zetafax answers the call. This is normally done by adding them to the fax number, after a few *pause* characters. Because of the relatively high level of sophistication required this is suitable for expert fax senders only!

### Station ID suffix

If you are sending a fax to another Zetafax system, you can specify the recipient's username to cause the fax to be routed directly to that user. This is done by adding the username to the end of the destination fax number, separated by a colon; for example 123 4567:Brian. You can also set up other routing names for use with this mechanism such as extension numbers or descriptive names such as SALES.

The username or parameter is sent to the remote fax system by adding it to the end of the *station identifier*, or *CSID*. This is the identifier programmed into all fax machines and printed on the top line of faxes they send, and is usually set to the sender's fax number. Sometimes called colon routing, this routing method is also supported for faxes sent to and from other PC fax systems.

### T.30 sub-addressing

The ITU Group 3 fax T.30 specification has been extended to allow for sub-addressing in addition to the basic fax number. At first only fax software will support this, but in the future expect to see fax machines with an extra button or two. It works in the same way as [Sender ID extension routing](#).

#### Related topics

[Automatic routing options](#)

[Sub-addresses](#)

[Sender ID routing](#)

[Automatic forwarding](#)

[Hardware requirements](#)

[Software configuration](#)

[Use from the Zetafax Client](#)



## Sub-addresses

Contains rules that automatically route incoming messages according to their sub-addresses.

While this folder is selected in the left pane, the **Action** and **Right-click** menus provide commands that work on this folder.

The right pane shows the routing rules within this folder, with the following columns of information:

### Sub-address

The sub-address of the number to which the message was sent.

### Route to

The name of the user to which messages with the specified sub-address are to be sent.

While an item is selected in the right pane, the **Action** and **Right-click** menus provide commands that work on this item.

### Related topics

[Automatic inward routing folder](#)

[New sub-address routing rule](#)

[Edit sub-address routing rule](#)

[Sender ID's](#)

[Forwarding](#)

[Sub-address routing](#)

[Automatic inward routing](#)



## New sub-address routing rule

---

Lets you enter the details of the new sub-address routing rule.

### Sub-address

The sub-address of the number to which the message was sent.

### Route to

The name of the user to which messages with the specified sub-address are to be sent.

### Related topics

[Sub-addresses](#)

[Edit sub-address routing rule](#)

[Sub-address routing](#)



## Edit sub-address routing rule

---

Lets you edit the details of an existing sub-address routing rule.

### Sub-address

The sub-address of the number to which the message was sent.

### Route to

The name of the user to which messages with the specified sub-address are to be sent.

**Related topics**[Sub-addresses](#)[New sub-address routing rule](#)[Sub-address routing](#)

## Sender ID routing

Each fax machine (or other fax system) has a *signature* which allows the recipient to recognize who sent the fax. This is called the *Station Identifier* or *CSID*, and is usually set to the sending machine's own fax number. As an alternative, Calling Line Identification (CLI) is being introduced by most telephone companies to identify the phone number of the sender. The CLI can be used if the CSID is not configured for a received fax.

Often only one person in your company deals with a particular sender, and so wants all faxes from that company to be routed directly to them. Zetafax allows you to set up a list of sender IDs with the users to which faxes from those companies should be routed.

**Related topics**[Automatic inward routing folder](#)[New Sender ID's routing rule](#)[Edit sender ID routing rule](#)[Sub-addresses](#)[Forwarding](#)[Automatic inward routing](#)

## Sender IDs

Contains rules that automatically route incoming messages according to their sender IDs.

While the **Sender IDs** folder is selected in the left pane, the **Action** and **Right-click** menus provide commands that work on the folder.

- Select **Add** to add a new Sender IDs routing rule, displaying the [New Sender IDs routing rule](#) dialog.

The right pane shows the routing rules within this folder, with the following columns of information:

**Messages for**

The name of the user to whom the message was sent.

**Sender ID**

The sending fax machine's station identifier (CSID) or the sending line's Calling Line Identification (CLI).

**Organization**

The name of the sender's organization. The Zetafax Client In folder displays this to aid identification of the fax sender.

**Route to**

The name of the user to which messages to the specified user and with the specified Sender ID will be routed.

While an item is selected in the right pane, the **Action** and **Right-click** menus provide commands that work on the item.

**Related topics**[Automatic inward routing folder](#)[New Sender IDs routing rule](#)[Edit sender ID routing rule](#)[Sub-addresses](#)[Forwarding](#)[Sender ID routing](#)[Automatic inward routing](#)

## New Sender IDs routing rule

---

This dialog lets you enter the details of the new sender ID routing rule.

**Messages for**

The name of the user to whom the message was sent. If you want the rule to match messages regardless of the user to which they were sent, select **(unaddressed)**. Such rules takes lower precedence than rules that do specify a user.

**Sender ID**

The sending fax machine's station identifier (CSID) or the sending line's Calling Line Identification (CLI). Only digits and letters are significant. You may also enter spaces and other formatting characters, and those there are retained, they are ignored.

**Organization**

The name of the sender's organization. The Zetafax Client In folder displays this to aid identification of the fax sender.

**Route to**

The name of the user to which messages to the specified user and with the specified Sender ID will be routed. To cause the rule to simply add the organization name and not reroute the message, select **(none)**.

**Related topics**[Sender IDs](#)[Edit sender ID routing rule](#)[Sender ID routing](#)

## Edit sender ID routing rule

---

Lets you edit the details of an existing sender ID routing rule.

## Messages for

The name of the user to whom the message was sent. If you want the rule to match messages regardless of the user to which they were sent, select **(unaddressed)** . Such rules takes lower precedence than rules that do specify a user.

## Sender ID

The sending fax machine's station identifier (CSID) or the sending line's Calling Line Identification (CLI). Only digits and letters are significant. You may also enter spaces and other formatting characters, but Zetafax ignores these.

## Organization

The name of the sender's organization. The Zetafax Client In folder displays this to aid identification of the fax sender.

## Route to

The name of the user to which messages to the specified user and with the specified Sender ID will be routed. To cause the rule to simply add the organization name and not reroute the message, select **(none)** .

## Related topics

[Sender IDs](#)

[New Sender IDs routing rule](#)

[Sender ID routing](#)



## Delete

Deletes the sender ID rule.



## Automatic forwarding

If you are going away on vacation, you can tell Zetafax to forward all faxes sent to you to another user. You can even choose whether to keep your own copy of the faxes for when you return.

The automatic forwarding option can work repeatedly in a chain if necessary. For example, if the person looking after your messages also goes on vacation, their messages (including those forwarded from your account) can be forwarded on to someone else.

## Related topics

[Forwarding](#)

[Add Forwarding rule](#)

[Edit Forwarding rule](#)

[Inward routing rules - Forwarding](#)

[Automatic inward routing](#)

[Inward routing rules](#)

[Automatic inward routing folder](#)

[Sub-address routing](#)

[Sender ID routing](#)

## Forwarding

---

Contains rules that automatically route incoming messages according to the name of the recipient.

While this folder is selected in the left pane, the **Action** and **Right-click** menus provide commands that work on this folder.

The right pane shows the routing rules within this folder, with the following columns of information:

### Messages for

The name of the user to whom the message was sent. Route to

The name of the user to whom the message is to be forwarded.

While an item is selected in the right pane, the **Action** and **Right-click** menus provide commands that work on this item.

### Related topics

[Automatic inward routing folder](#)[Add Forwarding rule](#)[Edit Forwarding rule](#)[Sub-addresses](#)[Sender IDs](#)[Automatic forwarding](#)[Automatic inward routing](#)[Inward routing rules](#)[Automatic Inward Routing - Software configuration](#)

## Add Forwarding rule

---

### Messages for

The name of the user to whom the message was sent.

### Route to

The name of the user to whom the message is to be forwarded.

### Related topics

[Forwarding](#)[Edit Forwarding rule](#)[Automatic forwarding](#)





## Edit Forwarding rule

---

Lets you edit the details of an existing Forwarding routing rule.

### Messages for

The name of the user to whom the message was sent.

### Route to

The name of the user to whom the message is to be forwarded.

### Related topics

[Forwarding](#)

[Add Forwarding rule](#)

[Automatic forwarding](#)



## Software configuration

### Zetafax Configuration

Configuring the automatic routing options is done by the system administrator using **Zetafax Configuration**. The **Automatic Inward Routing** item (**Server Settings** folder) controls whether sub-address and/or sender ID routing will be used. They are enabled by default.

Additionally there is a separate **Automatic Inward Routing** item in the **Zetafax** folder itself, and this contains the rules that control inward routing.

You can configure each of the three types of routing listed below.

### Adding a routing rule

To add a routing rule of any one of the three types:

- Click **Automatic Inward Routing** (**Zetafax** folder).
- Click the type of rule required - **Sub-address**, **Sender ID**, or **Forwarding**.
- On the **Action** menu, click **Add**.
- Fill in the rule dialog's controls.
- Click **OK**.

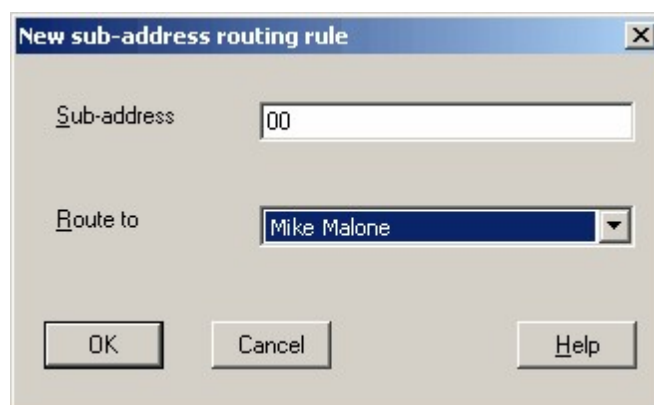
To edit an existing routing rule:

- Click the rule type item.
- In the right pane, click the rule.
- On the **Action** menu, click **Edit**.
- Make the required changes.
- Click **OK**.

### Sub-address

The sub-address option configures the rules for DID and DTMF routing, as well as for the other sub-address options (Station Identifier Suffix and ITU sub-addressing).

Each rule comprises a sub-address and a user to route the message to. For DID routing the sub-address should be the number reported to the fax modem on answering (usually the extension number or last few digits of the phone number dialed).



For example, if user FRED has a DID number of 020 7378 4122, HARRY's DID number is 020 7378 4123,

and HARRY is also looking after faxes directed to SALES (using the station ID suffix method), the rules might appear as:

4122 FRED  
4123 HARRY  
SALES HARRY

It is not necessary to add an explicit rule for each user if their name is specified in a station ID suffix; this is done automatically, though can be disabled by adding a blank rule for that name; i.e. routing to (**none**).

### Sender ID

Sender ID rules store two pieces of information for each sender: the organization name, and the person to receive faxes from that sender. Both these items can be set from the Zetafax Client program as well as from the **Zetafax Configuration** program.

The organization name is used for labeling the message in the client's **In** window when a fax is received; for example, **From: Smith and Sons** instead of **From: 012 345 9876**.

**Note:** Changing the organization name using **Zetafax Configuration** affects only messages received from that time onwards.

The new person to receive the fax depends on whom it was originally sent to. For example, suppose you have two general fax numbers for SALES and ACCOUNTS. Faxes from Smith and Sons for SALES are being handled by FRED, while faxes from Smith and Sons for ACCOUNTS are looked after by JIM. The rules would then be:

SALES Smith and Sons (012 345 9876) to FRED  
ACCOUNTS Smith and Sons (012 345 9876) to JIM

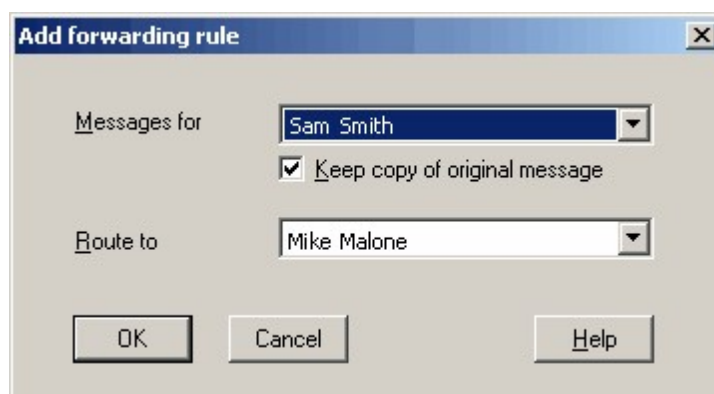
When adding rules using the **Zetafax Configuration** program you can set the **Messages for** field (the name of the person who originally received the fax) to (**unaddressed**). This means that the rule will be applied to messages from that company sent to any user, rather than just for a specific user. Any rules for specific users are applied in preference to the general rule.

You can also have rules which just give the company name, without specifying a user to forward messages on to. These appear in the list with the two username fields left blank.

Generally most sender ID rules are added by the user who receives unaddressed incoming faxes, using the **Zetafax Client** program (see [Use from the Zetafax Client](#)). The **Zetafax Configuration** program is then used for reviewing and adjusting the rules when required.

### Forwarding

The third routing option is for automatic forwarding when a user is away, such as on vacation. To configure this you specify the original recipient of the messages (the person going away), and the user to receive their faxes. For each rule configured, you can specify whether the original user keeps a copy of the original message (**copied to** in the list), instead of deleting the original (**forwarded to**).



For example, if messages for SUE and JIM are being looked after by MIKE and HARRY respectively, and SUE wants to keep a copy for her records while JIM does not, the rules would be:

SUE copied to MIKE  
JIM forwarded to HARRY

**Related topics**[LCR - Edit rules](#)[Sub-addresses](#)[Sender ID's](#)[Forwarding](#)[Automatic inward routing](#)



## Use from the Zetafax Client

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### Forwarding messages

Sender ID forwarding may be configured from the Zetafax Client Program by using the **Forward (File menu)** command. If you select the **Forward all future messages** check box on the forwarding dialog, a new Sender ID rule will be added. Any future faxes received from the same sender for this user will be routed to the user you are forwarding to instead.

Once a rule is configured, it can be changed using the **Zetafax Configuration** program. See [Edit sender ID routing rule](#) or [Software Configuration](#) for more information.

### Organization name

The organization name is displayed in the Zetafax client's **In** window when a fax is received. After viewing a fax received from an unknown organization, you are prompted for the organization name (provided you have administrator privilege, and the fax has not been forwarded to you by another Zetafax user).

When you set the organization name for a received fax, the **In** window entry is updated, and any future faxes from this company will be labeled with the company name; for example **From: First Fisheries** instead of **From: 012 666 7888**.

To change the organization name for a message in your **In** window, click **Name of Sender (Tools menu)** when viewing it. Other entries may be edited using the **Zetafax Configuration** program.



## Least Cost Routing

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These topics explain how to configure the Zetafax Least Cost Routing module, which allows you to route faxes between two or more Zetafax Servers in different locations.

They also explain how to configure a Least Cost Routing network and the complex routing rules on Zetafax Servers so that they can make intelligent decisions on the most efficient way to send a fax to its final destination.

### **Related topics**

[Least Cost Routing - Introduction](#)

[Configuring Least Cost Routing](#)

[Dialing properties](#)

[Enabling LCR](#)

[Setting up links to other Zetafax Servers](#)

[Providing information about fax destinations](#)

[Least Cost Routing dialog](#)



## Least Cost Routing - Introduction

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The Least Cost Routing ("LCR") module allows you to reduce the cost of sending faxes by linking two or more Zetafax Servers in different locations. Faxes can be routed at minimal cost, using email or a Wide Area Network (WAN) link, from their origin on a desktop in one location to a Zetafax Server in another location, which may be closer to the final destination of the fax.

For example, a company with offices in London and New York may choose to configure its London server to route all faxes to North American destinations via the New York server.

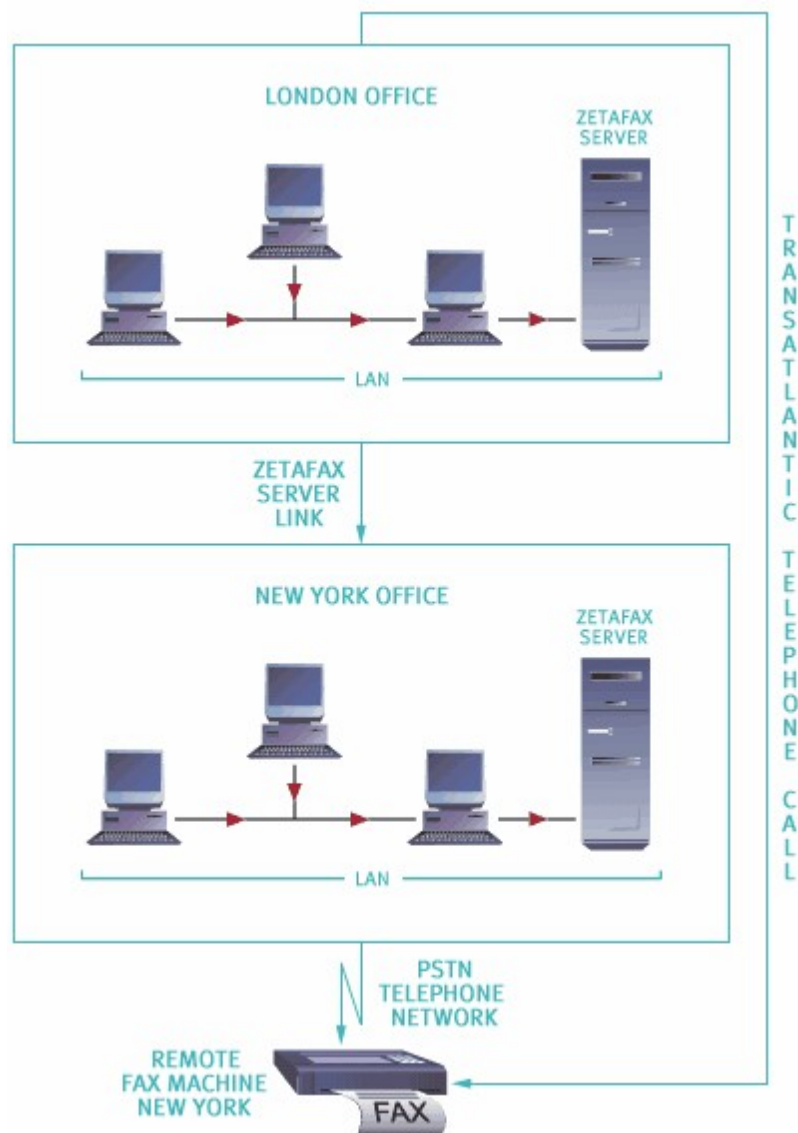
Transmission of the fax to its final destination over the telephone network from the New York server may give a considerable saving compared with the cost of long-distance transmission from the point of origin of the fax in London.

A number of other factors besides the destination of the fax may be important in deciding which server a fax is to be sent from. For some slower network links, the time taken for network transmission may represent an unacceptable delay for urgent faxes, so the server may be configured to send all urgent faxes directly, rather than via a distant server.

Faxes from certain users may be deemed too sensitive for transmission over the Internet, and may be sent directly.

The size and time of sending of faxes may have an effect on network and Zetafax Server traffic. The time of sending may also have additional effects on telephone call rates, so these parameters may also be reflected in the routing rules.

For example, the London server may be configured to route faxes to North American destinations via the New York server only between 08:00 and 12:00. At these times the call rate is peak in London, but the New York server is not yet busy.

**Related topics**[Configuring Least Cost Routing](#)[Enabling LCR](#)[Setting up links to other Zetafax Servers](#)[Setting up routing rules](#)





## Configuring Least Cost Routing

Least Cost Routing is configured using the Zetafax Server Configuration program. To open the LCR configuration dialog:

- Launch the **Zetafax Configuration** program (**Start** menu, **Programs** submenu, **Zetafax** submenu).
- In the right pane, click **Server Settings**.
- In the right pane, double-click on **Least Cost Routing of faxes**.

### Overview

To configure the Zetafax LCR module on a given fax server you will need to carry out the following steps, which are described in greater detail later in this section. See the [Related topics](#) for more information.

- Configure dialing properties to inform the Zetafax Server how to handle different types of telephone numbers.
- Configure your Zetafax Server to use LCR.
- Set up links to other Zetafax Servers.
- Provide information about the destinations of your faxes.
- Set up rules for routing your faxes to other Zetafax Servers on the network.

It is important that you proceed through the set up in this order. The final stage of setting up rules for routing faxes requires that links to remote servers have been set up, and that some categories for fax destinations have already been defined.

If changes are made to fax destinations and the properties of links to remote servers *after* routing rules have been set up, you may need to adjust the currently configured routing rules.

### LCR rollout strategy

Configuring multiple Zetafax Servers to perform LCR can be a complex operation. We recommend that when setting up a link on your LCR network, you carry out the following steps:

- Use the **Zetafax Configuration** program to create the link between the two sites.
- Use the Zetafax Server program to ensure that the link is operational and is 'online'.
- Add a single rule, routing all faxes for a single specified user (the network administrator) over the link.
- Send a fax over the link.
- Configure routing rules for this link to apply for a single, specified user (the network administrator).
- Send several test faxes to ensure that the Zetafax Server rules function as intended and that faxes which are meant to go over the link do so. Equally, you should ensure that faxes which are meant to be sent locally are sent locally.
- Enable the routing rules for all network users.

This will ensure minimum disruption to your Zetafax users' faxes while you configure LCR.

### Requirements for LCR

Before you proceed to configure Least Cost Routing rules between two or more Zetafax Servers, the servers must be able to communicate using one or more (for multiple links) of the following methods.

#### Basic link requirements

LAN connection moving files between shared folders (protocol independent). WAN connection moving files between shared folders (protocol independent).

WAN connection using email.

Email connection over the Internet using a MAPI compliant email system (not POP3/SMTP).

### Email link requirements

The following email systems are supported:

- Microsoft Exchange 2003 or later.
- Lotus Notes v5 and later.
- Other MAPI compliant email systems.

The Zetafax Servers on an LCR network communicate using email accounts created for their own exclusive use. It will also be necessary to install client software on the Zetafax Server computer for whichever email system you are using.

### Related topics

[Dialing properties](#)

[Enabling LCR](#)

[Setting up links to other Zetafax Servers](#)

[Providing information about fax destinations](#)

[Setting up routing rules](#)

[Least Cost Routing dialog](#)



## Dialing properties

The dialing properties determine how the Zetafax Server converts numbers which are entered at the fax addressing stage at the Zetafax Client into a format that can be dialed. The conversion rules are vital if LCR is to be used, since numbers entered at a client in one location will probably be passed to a server in another geographical location. As LCR may be installed between servers in different countries, or different areas within a country, it is possible that each server requires numbers to be dialed differently. To cope with these differences Zetafax first converts telephone numbers into a universal (canonical) format, and then into the correct format for dialing.

### Configuring the dialing properties

If you intend to use LCR between one or more remote Zetafax Servers, then you must configure the dialing properties. To do so:

- In the LCR configuration dialog, click **Dialing** in the **Category** list.
- Select the **Dialing** option and click **Configure...**

The **Dialing properties** dialog allows you to specify settings which help the Zetafax Server convert the fax number entered by a user into an international format, adding area and country codes if necessary. It also tells the fax server how to dial an international format number from this fax server.

To disable dialing properties at any time:

- Select **Dial numbers as entered**.

The Zetafax Server will not perform any conversion of the fax number entered by a user when addressing a fax at the Zetafax client.

The **Dialing properties** dialog allows you to specify the dialing properties.

To use the standard Windows dialing properties:

- Click **Use standard TAPI dialing properties**.

Under Windows 2003, these settings can be adjusted in the **Telephony** control panel, or by clicking **Edit TAPI settings...** in this dialog.

To use the Zetafax dialing properties:

In some cases, particularly for earlier versions of Windows, TAPI settings may not give reliable results all of the time. In this case we recommend that you use the Zetafax settings instead:

- Select **Use Zetafax dialing properties**.

### Server location

The **Server location** section allows you to specify the country and the area code where your server is located, and list the national and international dialing prefixes.

For example:

UK	International	00
	National	0
US	International	011
	National	1

### Area rules

In some countries, numbers with the same area code are treated as "local" - you omit the area code for local numbers, and you dial the area code for all other numbers, often with an added digit at the start (the national access code). However, in certain countries, such as the USA and Canada, it may be necessary to dial certain area codes as local area codes, i.e. without the national dialing code prefix.

For example, in Atlanta, numbers beginning (770) and (404) are treated as local calls when dialed from within the Atlanta area. The **Server location** section specifies that the fax server can only be located in one of these locations, e.g. (770), therefore it is necessary to dial all numbers beginning (404) as if they were local and without the national access code. Click **Area rules...** to specify such telephone numbers that must be treated as special cases.

#### National area codes

The **Identifying national numbers** section allows you to tell the Zetafax Server how it can recognize a telephone number which contains a national area code.

For some countries, such as the UK and most of Europe, telephone numbers are normally quoted with the national access code, for example in the UK a central London number normally begins 020 7 where zero is the national access code. For other countries, where the area code is not normally quoted, e.g. the US and Canada, the only way to recognize a local telephone number is by its length.

The **Zetafax Configuration** program can deal with both of these scenarios. Zetafax can be configured to count the number of digits in a given telephone number, to determine whether the telephone number includes an area code. It does this by comparing the number of digits with the **Numbers of more than** field. If the telephone number contains more digits than this field, Zetafax will assume that the area code is not included and will add it while converting to canonical format.

This setting can be used if it is common for network users to enter fax numbers without entering an area code, for example if they are dialing to another local number within their local area code.

Alternatively, you can configure Zetafax to identify whether a national number has been entered by reading the first digit of the telephone number and matching it to the national access code. Numbers of any length without the National access code prefix are treated as local numbers.

#### Local area codes

This section allows you to specify how Zetafax handles local telephone numbers. It allows you to define whether the fax server should always dial the area code (called 10-digit dialing in the USA) and whether it should always dial local numbers using the national access code.

#### Test dialing properties

Whichever method you use to resolve telephone numbers you should use the Test dialing properties facility before you leave this dialog. This utility allows you to test and confirm that both Windows settings and any Zetafax settings behave as intended and they convert the different types of telephone numbers to a valid format for this fax server.

The list of numbers included should test all cases; however you can also enter any number by hand.

The canonical format and dial able number conversions for the test number are displayed so that your settings can be checked.

#### Example 1 - Atlanta, USA

The following example highlights some valid dialing properties for a fax server based in the (770) area code in Atlanta, USA. It is intended as a guideline to help network administrators configure LCR for a fax server within North America.

**Dialing properties**

☒ Use Zetafax dialing properties
 ☐ Use standard TAPI dialing properties
 [Edit TAPI settings...](#)

**Server location**

Server is in this country: USA and Canada
 Area code: 770
[Area rules...](#)

International access code: 011
 National access code: 1
[Restore defaults](#)

**Identifying national numbers**

To build numbers into full international (canonical) format, numbers already containing an area code need to be distinguished from those without an area code

☒ Numbers of more than 7 digits contain an Area code
 ☐ Numbers with area codes always begin with the National access code

**When dialing local numbers**

☐ Always dial area code (10-digit dial)
 ☒ Include the National access code

**Test dialing properties**

Number to test	Canonical	Dialable
<span>1 770 444 5555</span>	+17704445555	4445555

[OK](#)
[Cancel](#)
[Help](#)

- Select **USA and Canada** from the list of countries for **Server location** and enter 770 for the **Area code**.

This informs Zetafax that the fax server is located in the US, but more specifically within the Atlanta (770) region.

**Zetafax Configuration** will complete the National access code and International access codes as 1 and 011 respectively.

- Enter 7 in **Numbers of more than** for identifying local numbers.

As numbers within North America contain 7 digits, the Zetafax Server will recognize all telephone numbers which it receives containing more than 7 digits in an area code, and will deal with them appropriately.

- Finally check **Always dial area code (10-digit dialing)** and leave the **Include the National access code** box unchecked.

This ensures that the fax server always dials 10 digits when calling a local telephone number and does not prefix local telephone numbers with the national access code 1.

- Use the test function to check that numbers are converted as expected.

For Atlanta, numbers with area code 404 are also treated as local telephone numbers and must not be prefixed with the national access code when dialed. To configure this:

- Click **Area rules...** to display the **Area rules** dialog.

- In the **Do not dial National access for numbers with these Area codes** dialog, click **Add** to display the **Add number** dialog and type 404 in **Number**.

This configures Zetafax to treat telephone numbers to the (404) area as local calls so they are not prefixed with the national access code 1.

- Click **OK** to add the new area code to the list and click **OK** to close the **Area rules** dialog.

#### Example 2 - London, UK

The following example highlights some valid dialing properties for a fax server based in the 020 area code in London, UK. It is intended as a guideline to help network administrators configure LCR for a fax server in the UK, and may also be applied to most European countries.

- Select **United Kingdom** from the list of countries for **Server location** and enter 020 for the **Area code**.

This informs Zetafax that the fax server is located in the UK, but more specifically within the Inner London (020) region.

**Zetafax Configuration** will complete the National access code and International access codes as 0 and 00 respectively.

- Select **Numbers with area codes always begin with the National access code** for identifying local numbers.

This setting makes Zetafax recognize telephone numbers which are prefixed with the national access code, in this case a 0 as containing the area code.

- Leave **Always dial area code** and **Include the National access code** unchecked.

In the UK, it is possible to call telephone numbers in the same area code without prefixing the number with the area code.

- Use the test function to check that numbers are converted as expected.

#### **Related topics**

[Least Cost Routing](#)

[Telephone dialing properties](#)

[Least Cost Routing - Introduction](#)

[Configuring Least Cost Routing](#)

[Enabling LCR](#)

[Setting up links to other Zetafax Servers](#)

[Setting up routing rules](#)



## Enabling LCR

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Once you have specified dialing properties for your Zetafax Server, you can proceed to the next stage of the setup process. The **LCR** option in the **Zetafax Configuration** program takes you through a four-stage process in preparing and then configuring the fax server to send and receive messages between other Zetafax Servers.

This procedure is as follows:

- Configure your Zetafax Server to use LCR (**General...** button).
- Set up links to other Zetafax Servers (**Links...** button).
- Provide information about the fax destinations (**Destinations...** button).
- Set up rules for routing your faxes to other Zetafax Servers on the network (**Rules...** button).

It is important that you proceed through the setup in this order. Each stage is described in turn in the sections which follow.

### Configuring the Zetafax Server to use LCR

To configure the Zetafax Server to use LCR:

- Click **General...** to display the **General settings** dialog.

This is where you configure this Zetafax Server to use the LCR network.



**General settings**

Local server ID: NewYork1

Local server description: NewYork fax server

**Email links**

☒ Allow Email links

Email type: Microsoft Exchange

Email profile: Exchange settings

Password:

Check inbox every (hh:mm): 00:00 Test

**WAN links**

☒ Allow WAN links

WAN Inbox folder: C:\ZFAX\SERVER\LCRIN

Check inbox every (hh:mm): 00:00 Test

OK Cancel Help

The **Local server ID** is the unique identifier for your Zetafax Server on the LCR network, and must contain only letters and numbers, with no spaces. You may also enter a **Local server description**, which can be more informative, and will be used to refer to the local server elsewhere in the setup procedure.

#### Using email links

The next stage is to specify all of the possible methods your server is capable of using to communicate with other servers on the LCR network. To use email to submit and receive faxes from remote servers you must select the **Allow Email links** option, and provide details about an email account on the Zetafax Server computer for the LCR module to use.

#### Microsoft Exchange and MAPI email systems

If you are using Microsoft Exchange, select **Microsoft Exchange** from the **Email** list. For any other MAPI compliant email system, except Lotus Notes, select **Other (MAPI compliant)**. You must now specify the **Email account or profile** name (profile for Microsoft Exchange) and the **Password** that you would normally use to log in to the account.

#### Lotus Notes

If you are using a Lotus Notes email system, it is important that you select the correct version of Lotus Notes. For more recent systems, version 4.1.1 or later, select **Lotus Notes (V4.1.1 or later)** from the **Email types** list. For earlier versions, select **Lotus Notes (pre V4.1.1)**.

As well as the **Email account or profile** and **Password** , Lotus Notes systems also require the Lotus Notes email server name to be specified. Zetafax will try to find both the email server name, and the account profile, and will suggest these as default settings.

**Note:** On Lotus Notes 4.11 or later, provided the fax server is running on Windows 2003 or later a password can be specified for the Notes Inbox.

#### Testing email settings

You can test your account details by clicking **Test** . Zetafax will attempt to log onto the account specified, and will report the outcome.

This process may affect other email programs that are logged into the account at the same time, including the Zetafax Server if it is running. We recommend that you stop the Zetafax Server before clicking the **Test** button.

#### Email check frequency

**Check Inbox every (hh:mm)** determines how often Zetafax will check the email account for messages from other servers on the network. The default setting is 00:00, for most frequent checking. If you are concerned about overloading your email server by frequent monitoring of the account, you may wish to set a longer check interval. Be aware that a large value here will affect the amount of time taken for messages to travel between servers, and values for **Link delay** must be chosen accordingly; see [Link delay](#).

#### Using WAN links

Servers communicating using WAN links copy files into shared folders on the network. To use WAN links, you must first check the **Allow WAN links** box. You must then specify the **WAN Inbox** folder, where the local server is to look for messages from other servers on the network.

You can enter the folder path either as a Universal (UNC) address (e.g. \\Server\_Name\Folder\WANInbox), a network drive mapping, which Zetafax will convert (e.g. Z:\Folder\WANInbox), or a local drive path (e.g. C:\Folder\WANInbox).

#### Testing WAN Inbox

The **Test** button ensures that the folder path has been typed correctly, and that the server has the necessary access rights. Zetafax will attempt to find the folder, test reading and writing in the folder, and will then report the outcome.

#### WAN Inbox check frequency

**Check Inbox every (hh:mm)** is equivalent to the setting for email links, and determines how frequently the Inbox is scanned for new messages. The default is 00:00 for frequent checking, but this can be increased to a larger value if you are concerned about causing extra network traffic. Again, care must be taken when specifying large values, as this will affect the amount of time taken for messages to travel between servers; see [Link delay](#).

#### Related topic

[Least Cost Routing dialog](#)



## Setting up links to other Zetafax Servers

The next stage in setting up the Zetafax Server for LCR is to enter some information about other servers on the network.

- Select **Links** from the **LCR options** dialog to display the **Links to remote servers** dialog.

The display shows a list of the currently configured links.

### To add a new link

- Click **New** to display the **Edit link properties** dialog.

The first field in the dialog allows you to enter an informative **Link description**, 'New York server' for example. The tabbed section allows you to configure the other properties of the link.

When setting up a link between two LCR servers, there are several settings which must be identical on both servers in order for the link to perform properly. It may sometimes be a good idea to configure both ends of the links simultaneously, or make note of the important settings so they can be entered identically later.

### General tab

The **General** tab allows you to specify what the link is and how it should behave.

The **Remote server ID** is the identity of the remote server to be linked to, and will be used in all communications on the link. It must be identical to the remote server's **Local ID**, defined in the **General settings** dialog on the remote server. This field must contain letters and numbers only, without spaces.

You can specify a **Link password** which Zetafax uses to secure all transactions on the link. It is vital that the same password is entered at both ends of the link, otherwise communication will not be possible. When you exit from this dialog and reopen it, the **Zetafax Configuration** program will hide the password.

**Please note:** The password field is an optional field, and may be left blank if you are not concerned about security.

### Link functions

The next stage in setting up the link is to define what functions it will perform. Each link can be configured to submit outgoing faxes to the remote server and to accept faxes from the remote server which will be sent by this local server.

One or both of these boxes must be checked or the link is rendered redundant. If either of these boxes is left unchecked, care must be taken to ensure that the complementary box is also unchecked at the remote server so that the settings are compatible. For example, configuring both servers to allow sending but not receiving will result in a deadlock where no faxes are sent over the link in either direction.

### Zetafax user account

If the link is configured to process incoming messages a **Zetafax user account** must be configured locally which will be used to send faxes submitted to this server by other remote servers on the LCR network. You may wish to set up a new Zetafax user for each link, or to use a single account for all links. In either case, a new account can be set up now by selecting **(new)** from the top of the list of available Zetafax accounts. When you close the dialog, or attempt to move to a different tab, you will be taken to the **Add new Zetafax user** dialog and prompted to enter some more information about the new account.

### Link status

The final setting on this tab allows you to select whether or not you wish to start the link in a SHUTDOWN

state. If the Zetafax Server is currently running, new links will normally be started up as soon as the setup is finished. You may set up a new link, but leave it shut down initially by checking this option. The link can then be opened later using the Zetafax Server (ZSERVER) program; see [Using ZSERVER to monitor links](#).

### WAN or email links

Use the **Communications** tab to specify whether you want the two Zetafax Servers to communicate using a WAN, or email connection. This choice is dependent on whether you enabled either WAN or email links in the **General settings** dialog when you enabled this LCR server; see [Configuring the Zetafax Server to use LCR](#).

#### WAN links

To configure the link to use a WAN connection, you must complete the **WAN Inbox** field by entering the path of the remote server's Inbox on the network, as defined in the **General settings** dialog on the remote server. You may enter the path either as a Universal name (UNC) (e.g. \\Server\_Name\Folder\WANInbox) or you can enter a network drive mapping (e.g. Z:\Folder\WANInbox), which Zetafax will convert to UNC format. The **Test** button behaves in a similar manner to that of the **General settings** WAN Inbox test, and can be used to ensure that the path is typed correctly, and that the server has the necessary access rights to copy files to the folder.

#### Email links

To configure an email link, you must first select the appropriate type of email from the **Link type** list. **Internet mail** is self explanatory and can be referred to as "slow" email, as it is less reliable and messages tend to take longer to reach their final destination than an internal email system, which can be referred to as **fast** email.

Whichever email link type you choose, you must specify the **Email address of the remote fax server**. This can either be a name from the email system's address book, or a standard SMTP type address of the form *name@host.com*. Use the **Test** button to check the email settings are working. Zetafax will attempt to log into the email account that was specified in the **General settings** dialog, and send a test message to the address of the remote server. Zetafax will report any problems logging in or attempting to send the message.

When you have used the test function, you should also check the email account itself to make sure that the message was processed and sent successfully and it was not rejected for any reason. You can do this by manually logging on to the specified account from the computer where the Zetafax Server is running.

#### Link delay

For both WAN and email links, Zetafax requires some information about the speed of transmission of messages over the link for LCR to work effectively. The **Link delay** should be an estimate of the *maximum* length of time it should take a message to pass from one server to the other. The **Zetafax Configuration** program suggests a default value, the length of which depends on the type of link configured, i.e. the delay for a slow email link will be longer than a WAN link.

### Priority tab

The **Priority** tab allows you to control the type of fax traffic allowed over the link depending on the importance of the fax. It is only necessary to specify a setting here if you know that the remote server to which you are connecting has restrictions on the maximum message priority it can accept for incoming requests. This setting has the effect of preventing faxes above a specific priority ever being sent over the link to a remote server only to be rejected.

This setting may be used if the delay in transmission of a fax marked as Urgent caused by a slow email link may be unacceptable to the user. You can configure which types of faxes should be sent over this link to a remote fax server by changing the **Maximum priority** setting in the **Messages submitted to remote server for sending** section.

Messages with higher priority than specified will not be routed via this link but they may be routed via another link if there is a rule permitting it.

#### Protecting locally submitted faxes

The other purpose of the **Priority** tab is to allow the network administrator to restrict certain faxes from being submitted to your server from other servers. You can use the **Maximum message priority** box in the same way as for submitted messages. In addition, you can reject or reduce the priority of higher priority messages submitted to your server. This protects any messages submitted by this fax servers own Zetafax users, ensuring that they are sent first. For example, you may choose that any messages submitted from a remote server is given background priority.

### Watchdog tab

The **Watchdog** tab allows you to set up a link watchdog, which sends regular check messages to the remote server so that the integrity of the link can be monitored. If an expected message is not received, the remote server will mark the link as failed and route faxes elsewhere to other LCR servers or send them itself. Using the watchdog on unreliable links is not recommended, since the link may be closed unnecessarily (although it will restart automatically as soon as messages are received again).

To start the link watchdog, check the **Enable link watchdog** box on the **Watchdog** tab. You will also be prompted for a **Watchdog message frequency** . This is the maximum amount of time that the remote server cannot be contacted before the link is marked as failed by the remote server. A default value of 15 minutes is suggested, which would allow an administrator to restart the remote computer if they wanted, without affecting the link.

As with many of the link settings configured using the **Edit link properties** dialog, it is necessary to configure the remote server with identical settings to successfully monitor link integrity.

### Managing links

Once you have set up a new link you will see it listed in the **Links to remote servers** dialog. From within this dialog you can change the link properties by selecting it and clicking on **Edit** , or by double-clicking on the link description.

To create a new link based on a previously configured link, select the link from the list of remote servers, and click **Copy** . This will copy all the information from the selected link to a new link definition. It will not copy the **Remote server ID information** , as each link must be to a unique remote server. You will be prompted to change this.

The **Links to remote servers** dialog also allows you to delete any of the configured links, by highlighting them and clicking **Delete**.

### Testing links

Before you proceed to the next stage of the setup process, you should first test the links you have configured in this section to ensure that you can establish connections to remote servers. In order for the link to work, both ends of the link need to have been configured. That is to say, it is necessary to have created an identical link to your server from the remote server.

To test the link successfully, you will learn about monitoring links using the Zetafax ZSERVER program and setting up a simple rule to route one Zetafax user's faxes (the network administrator) over the link.

### Using ZSERVER to monitor links

The Zetafax Server monitor program, ZSERVER, allows you to monitor and control the link status of all of the links you have configured using the Zetafax Server configuration program.

When you start the Zetafax Server, the ROUTER program checks the status of each link in turn and displays the status next to the link icon in the main screen. When you create a new link a new icon will be displayed automatically without the need to restart the Zetafax Server.

New links appear in an **Initializing** state. This means that they have sent an initialization message to the remote server and are awaiting a response. The link will remain in this state indefinitely until it receives a response from the remote server. When a response has been received from the remote server, the link is put into an **ONLINE** state whereupon it can begin to forward messages.

The following table summarizes the various link statuses:

Status	Meaning
Initializing	The link has been successfully configured - an initialization message has been sent to the remote server and it is awaiting a response.
Online	The link between the servers is active and messages will be transmitted over this link.
Offline	The link has been disabled either locally or at the remote server. If it has been disabled at the remote server, it may come back online pending user intervention at the remote server.
Failed	There is an error on the link, such as a watchdog timeout.
Shutdown	Link has been disabled by local network administrator. The link can only return to an online state by issuing an online command at the local fax server.

For more detailed information about a link or to change the status of a link, click **Links (Options menu)** in the main ZSERVER program. The **Link status** dialog will be displayed, showing the status of all of the currently configured links together with logged information, such as the number of messages which have been sent and received over the link.

The **Link status** dialog also allows you to send an offline or online request to a specific link. The online request can be used to attempt to reestablish communications with a remote server. The **Offline...** button should be used to close down server links gracefully if you intend to close down the Zetafax Server for any amount of time. This ensures that all links are marked as failed at remote servers which will not attempt to route faxes over these failed links. The **Offline All...** button can be used to offline all links simultaneously.

### Creating a simple rule

If the link successfully establishes a connection with the remote server and shows an **Online** status, the next stage of testing is to route a fax over the link to the remote fax server and have it submit a fax for you. To do this, you need to configure a simple rule which will route to all faxes sent by a specific user, the network administrator over the link. This will allow you to test the link without interfering with other Zetafax users' faxes. See [Setting up routing rules](#) to configure more complex rules that allow sophisticated choices of which messages will be submitted over the link.

Return to the **Zetafax - configuration options** dialog and click **Rules...** from the **LCR** panel. The **Routing Rules** dialog will be displayed, and this will initially be empty as you have not previously created any rules on this server.

To create a new rule:

- Click **New**.

The **Edit Routing Rule** dialog will be displayed.

- Type a description in the **Rule description** field.
- Select the **Users** tab and select the **Rule applies to the following users only** option; then select your Zetafax user name from the list.
- Click the **Servers** tab and select the Zetafax Server to which you want to route your test fax.

This should be the same server to which you configured a link earlier.

- Click the **Summary** tab and check that it looks similar to the screen above.

The rule has been configured to route all faxes for your Zetafax user over the new link.

- Click **OK** to accept the new rule and open the Zetafax client.
- Send a fax to your own office fax number.

You can monitor the status of the fax in the Zetafax Client **Out** window. The fax status icons will change at each stage of the fax transmission to record the progress. If the link has been configured correctly, the fax should get submitted to your remote server and sent by one of its devices.



## Providing information about fax destinations

Before moving onto the final stage of LCR setup and configuring routing rules, you must first tell Zetafax about possible destinations for any faxes which Zetafax users might submit to their fax server.

- Click **Destinations** from the **LCR** panel.

The **Edit destinations** dialog will be displayed. There are three levels of destinations: Countries, Areas, and Regions.

The **Edit destinations** dialog has two tabs. The first allows you to configure **Countries and Areas**, and the second tab allows you to configure **Regions**.

All country, area, and region definitions require a description, which will be used to refer to the destination when setting up routing rules. This may consist of any text, and may be changed at any time which is useful, if the destination definitions are exported to a server in another country. A unique ID is also required for use by the Zetafax Server only. This may contain letters and numbers only, and a suggestion will automatically be produced when you type in your description. This ID may not be changed later.

### Countries

A list of countries and their dialing codes is supplied with Zetafax. These countries will be displayed in the **Countries** list at the top of the **Countries and Areas** tab. The list is compiled from the International Telecommunications Union (ITU) list, and should not require frequent modification.

If you do need to change the list you can edit an existing country by selecting the country in the list and clicking the **Edit** button, or by double clicking the country.

This will display the **Edit country** dialog, with fields that allow you to edit the **Description** and **Dialing code** of the country. The dialing code must be unique for each country definition. Countries sharing the same dialing code must also share an entry in the country list (e.g. **USA and Canada** ).

To add a new country, click the **New Country** button from the **Countries and Areas** tab, and the **Edit country** dialog will appear as before. This time you must also type a unique ID for the new country.

### Areas

LCR rules can be designed so that faxes destined for different areas within the same country can be routed to different servers for sending. For example, a company with offices in New York and Atlanta may want all of its faxes from the New York office destined for the Atlanta area, to be submitted to the Atlanta server for sending. This allows the company to take advantage of the reduced local call rates the Atlanta server enjoys when sending to local numbers.

To define an **Area** within a country, select the relevant country from the **Country** list. Any previously defined areas within that country will be displayed in the **Area** list. Now you can add a new area by clicking the **New area** button, or edit an existing area by selecting the area and clicking the **Edit** button. In either case the **Edit Area** dialog will be displayed.

You can type a convenient **Area Description** , and for new areas you must also specify a unique identifier in the **Area ID** box.

Type a number that is to be considered part of the area in the **Match numbers starting** box. By default Zetafax will match all numbers starting with the digits you type, so the area New York, matching all United States numbers starting 212, may be defined by typing 212 in the **Match numbers starting** box. Now click the **Add** button to add the number to the list below.

Area definitions will often be similar to the country's standard area dialing codes, but this need not always be the case. An area definition may be as precise as to match a single number only. To define an exact

match, type the number to match, then check the **Match whole number** box before clicking the **Add** button to add it to the list.

To remove a number from the list, select it, then click the **Remove** button.

To change a number, first select it in the list. This will copy the number to the **Match number** box, where you can make the necessary changes. Now click the **Modify** button to replace the number with your modified version.

You can add as many numbers as necessary in this way, so for example you may create an area as diverse as 'All mobile phone numbers' by adding all of the dialing codes for mobile phones to the list. When you are happy with the list of numbers to match for your area, click **OK** to exit from the dialog.

## Regions

Regions provide a mechanism for increasing the flexibility of country and area definitions, and simplifying rule definitions. A region may comprise any combination of countries and areas. A region **Europe** may be defined to include all European countries, and used in a rule to route all faxes originating at a server in the USA, but destined for European countries, via the London fax server for example.

In a similar manner, a region **East Coast USA** may be defined to include a number of areas within country dialing code **USA and Canada** which lie on the East coast of the USA. This type of region may be used in a rule to route faxes within a country where more than one fax server exists. For example, a company with Zetafax Servers in Los Angeles and New York may want all faxes destined for the West Coast USA to be routed via the Zetafax Server in LA, and those bound for the East Coast to be handled by the Zetafax Server in New York. Defining regions makes it simpler to handle larger groups of areas and countries by treating them as a single unit.

Since regions consist of a combination of countries and areas, its important that you have made all the necessary changes to the countries and areas before attempting to create regions.

To define a region:

- Click the **Regions** tab in the **Edit destinations** dialog.

A list of the previously defined regions will be displayed.

To create a new region:

- Click **New Region**.

This will display the **Edit Region** dialog, which allows you to enter a description of the region, and a unique identifier. A list of the countries that have been defined will be displayed, and selecting a country from the list will also bring up a list of all the areas within that country in the **Area** window.

You can add a country or an area to the list by selecting the item, and clicking the **Add** button, or by double-clicking the item. Added items will appear in the **Destinations** window, and can be removed again by selecting the item, and clicking the **Remove** button, or by double-clicking the item. Any combination of countries and areas may be added to your region definition.

When you are happy with your selection, click **OK** to return to the **Regions** tab. Your new region will now have been added to the list of regions. You can now **Edit** or **Delete** the region, and add more **New** regions.





## Setting up routing rules

The final stage in the setup process is configuring the routing rules which allow the Zetafax Server to make decisions on how to submit each fax. The routing rules are defined based on the information we have supplied in the previous stages of LCR setup, such as server information, link information and information about where faxes may be destined. Other criteria, such as message size, time of day, priority and network user may also be defined within LCR rules.

### Related topics

[Adding criteria to a rule](#)  
[Centralized management of LCR rules](#)  
[Configuring Least Cost Routing](#)  
[Configuring LCR for more than one site](#)  
[Creating LCR rules](#)  
[Edit rules](#)  
[Least Cost Routing](#)  
[Least Cost Routing - Rules](#)  
[Least Cost Routing - Troubleshooting](#)  
[Prioritizing rules](#)  
[Programs on the Zetafax Server](#)  
[Rule filter](#)  
[Server settings](#)



## Creating LCR rules

### Understanding LCR rules

When the Zetafax Server receives a fax from a network user, it checks the fax against each rule in turn. If the criteria of the fax match those of the rule, the server attempts to submit the fax to the first remote LCR server in the rules list. If that server is not available on the network, the other servers in the list are tried in turn. If the end of the list is reached and the fax does not match any of the rules, the fax is sent directly from the local server.

### Creating LCR rules

- Click **Rules** from the **LCR** panel and you will be taken to the **Routing rules** window, which contains a list of the rules that are currently operating on your server.

#### To create a new rule

- Click **New**.

This displays the **Edit Routing Rule** dialog that includes a field to enter a **Rule description**, and several tabbed boxes containing rule information.

Typing an informative description of the rule will simplify the stages of defining the rule, and help you to understand your rules later when you come to prioritize them. Example descriptions include **Send all urgent faxes via the local server** and **Send all faxes for North America via the New York server**.



## Adding criteria to a rule

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The **Summary** tab contains a summary of all of the criteria the rule follows so far. When all of these fields are blank, the rule is effectively saying that faxes to any destination, satisfying no other criteria, are to be sent via the local server. Use the remaining tabs to add criteria and a list of servers for the rule.

### Related topics

[Rules - Destinations](#)

[Rules - Zetafax users](#)

[Rules - Fax priority](#)

[Rules - Size of fax](#)

[Rules - Time of day](#)

[Rules - Remote servers](#)



## Rules - Destinations

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The **Destinations** tab shows a list of the destinations for which the rule is effective, and contains a list of the countries and regions that have previously been defined. Selecting a country from the list will also bring up a list of the areas defined within that country in the **Areas** window. Any combination of regions, countries and areas may be added to the rule by selecting the item, and then clicking the **Add** button. Alternatively you can double-click on the item itself. The added items will appear in the list of the rule's destinations above. An item can be removed from the rule's list by selecting it then clicking the **Remove** button, or by double-clicking the item.

You may want to configure rules that apply to faxes regardless of their destination, in which case no destinations should be added to the rule on this screen.

### Related topics

[Setting up routing rules](#)

[Adding criteria to a rule](#)



## Rules - Zetafax users

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The **Users** tab allows you to define which Zetafax users the rule applies for. By default the rule will apply to faxes from any user. To make the rule apply only to particular users, select **Rule applies to the following users only**. This will allow you to add users to the rule from the list of all users, in the same way that destinations were added in [Rules - Destinations](#).

### Related topics

[Setting up routing rules](#)

[Adding criteria to a rule](#)



## Rules - Fax priority

The **Priority** tab allows you to define specific priorities of faxes for which the rule applies. By default the rule will apply to all faxes, regardless of priority. To make a rule that only applies to faxes of particular priority, select **Rule applies to these priorities only**. This will allow you to check any combination of the priorities given, so that a rule may apply only to urgent faxes, or to urgent and background faxes, etc.

### Related topics

[Setting up routing rules](#)

[Adding criteria to a rule](#)



## Rules - Size of fax

The **Size** tab allows you to include or exclude faxes of a specific size for the rule. By default your rule will apply to faxes of any size. To make a rule that only applies for small faxes, select **Rule only applies to small faxes**, and enter the maximum number of pages for a fax to be matched to the rule. To make a rule that only applies to large faxes, select **Rule only applies to large faxes** and enter the minimum number of pages for a fax to be matched to the rule.

### Related topics

[Setting up routing rules](#)

[Adding criteria to a rule](#)



## Rules - Time of day

The **Time** tab allows you to define specific times of day when the rule should or should not operate. By default your rule will apply to faxes sent at any time. You can also configure your rule to apply to faxes sent at off peak times, or peak times by selecting the appropriate button. The off peak time here refers to the off peak setting in **Server settings** dialog.

You can also specify other times for your rule to apply, perhaps to take advantage of off peak times at a remote server. This can be done by selecting **Rule applies at the following times only** button. You can now select any combination of days of the week, and a time window during which the rule is to apply on the selected days. Times must be in 24 hour format, and may be adjusted either by typing directly, or by using the up and down arrows. For example, selecting Fri, From: 08:00 To: 18:00 will produce a rule that only applies on Fridays between 8am and 6pm. Selecting Mon Tue Wed, From: 13:00 To: 09:00 will produce a rule that only on Mondays, Tuesdays and Wednesdays any time except between 9am and 1pm.

### Related topics

[Setting up routing rules](#)

[Adding criteria to a rule](#)



## Rules - Remote servers

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The final part of setting up a rule is to provide the list of remote servers to which faxes matching the rule criteria should be submitted. Servers are added to the rule using the **Servers** tab. This provides a list of the servers currently in the rule, and a list of all the remote servers to which you have configured a link. For more information, see [Setting up links to other Zetafax Servers](#).

You can add and remove servers from the list in much the same way that destinations and users were added and removed in [Rules - Destinations](#). This time the *order* of the list is very important, since Zetafax will try submitting to the remote servers in the order that they are listed. Once some servers have been added to the list you can move a server up or down in the list by selecting it, then clicking the up or down arrows next to the list.

By default, if a fax matches a rule, but none of the remote servers for this rule are available on the network, the fax will be sent directly from the local server. To prevent this, uncheck the **Use local server** box.

### Related topics

[Setting up routing rules](#)

[Adding criteria to a rule](#)



## Prioritizing rules

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Once you have configured a rule, its description will appear in the **Rules** list in the **Routing Rules** dialog.

### To change a rule's criteria

- Select the rule and click **Edit**, or double-click the rule to display the **Edit Routing Rule** dialog.

If you have more than one rule defined you will also be able to move between rules from within the **Edit Routing Rule** dialog using the **Next rule** and **Previous rule** buttons. You may delete the selected rule from the **Rules** list by clicking the **Delete** button.

The *order* of the rules in the list is very important, because when Zetafax is deciding which rule to use it starts from the top, and picks the first rule that matches the submitted fax. If, for example, you configure a rule to send all urgent faxes via the local server, and another rule to send all faxes to North America via the New York server, the 'Urgent faxes' rule must come first. If the 'North America' rule comes first, an urgent fax destined for North America would be matched against the North America rule first, and routed via the New York server. If the 'Urgent faxes' rule was first, the fax would be sent directly from the local server.

To move a rule up or down in the list, select the rule, then click on the up or down arrow next to the list. This will swap the positions of the selected rule and the one above or below it.



## Rule filter

The rule filter facility allows you to check that the rules you have configured will behave as intended. The filter works by showing you which rules in your list will apply to faxes with certain parameters. For example, you may set up the filter to show which rules affect faxes to New York, or which rules affect Urgent faxes. You can also see which rules would cause faxes to be routed to a particular remote server.

To set up the filter:

- Click **Set filter parameters...**

The resulting dialog allows you to define the filter.

This allows you to specify which category you want to filter by - you must select one of **Destination** , **Priority** , **Size** , **Time** , **User** , or **Server** from the **Filter category** list. You can choose either to **Display all rules which include any requirements in that category** (for example, any rules that have a **Priority** specified), or to **Display rules which match these requirements** (for example, any rules that affect **Urgent** faxes).

The rule filter will allow you to select specific requirements within the appropriate category. For example, you could select a particular country, region, or area for **Destination** filters, or **Urgent** , **Normal** , or **Background** for **Priority** filters.

These filters will also show up any 'catchall' rules that may apply. For example, a filter on Destination New York would match rules directly affecting destination New York, *and* rules such as 'Send all urgent faxes locally', which applies to faxes regardless of destination.

To see which rules result in faxes being routed via a particular Zetafax Server, select **Server** from the **Filter category** list, then choose the name of the appropriate server from the **Server** list.

When you have set the filter as desired, click **OK** to return to the main **Routing Rules** dialog. You can view the results of the filter using the **Display criteria** options.

The **Mark filtered rules** option marks each rule that matches the message criteria specified in the filter with an asterisk. This option allows you to see where filtered rules are in relation to all the other rules in the list. The **Show filtered rules only** option removes all rules that don't match the filter from the list. It also numbers the remaining rules according to their position in the complete list. In this mode the rules can't be moved up or down, and new rules cannot be added.

You may want to test with a number of different filters to make sure the rules are performing as required.



## Centralized management of LCR rules

Zetafax LCR is normally configured by the network administrator responsible for the Zetafax Server at each site; however it is possible to specify your routing strategy across an LCR network from a single location.

While configuring local servers for LCR and setting up links to other servers on the network requires information specific to each server and must be done locally, fax destinations and routing rules may be defined by a head office, and distributed to all of the servers on the network.

This requires that the rules and destinations must function appropriately for all of the LCR servers. One way

to achieve this might be to imagine an extra server on the network that has links to all of the others, and to develop rules and location definitions for sending faxes from that server.

### Destinations

Work through the servers on the network, and define all the necessary areas and regions that will be required to produce efficient rules to and from them all. This may require the definition of areas in a number of countries.

### Use local server

When adding servers to rules, you may have noticed that the ID of your local server appears in the list of all the servers to which you have configured links. The ID of your local server is used when rules are exported to other servers, but the distinction between this and the **Use local server** option is very important.

The **Use local server** option always refers to the local server, regardless of where the rules are installed. You may want to use this for rules such as **Send all urgent faxes directly from the local server**. Choosing your local server from the list of remote servers will have a different effect depending on where the rules are installed. If you were configuring rules on a server in New York to **Send all faxes to North America via the New York server**, you would select your local server (New York) from the list of Zetafax Servers. Now when the same rule is used in London for example, faxes for North America will still be routed via New York.

Once the setup procedure is complete, Zetafax will have created a number of files containing all of your definitions. The files REGION.INI, COUNTRY.INI, several area definitions files AREAXXX.INI, and LCRRULES.INI may be found in C:\Program Files\Zetafax Server\SYSTEM\Z-DB. All of these may be copied directly into the same directory on fax servers across the network.



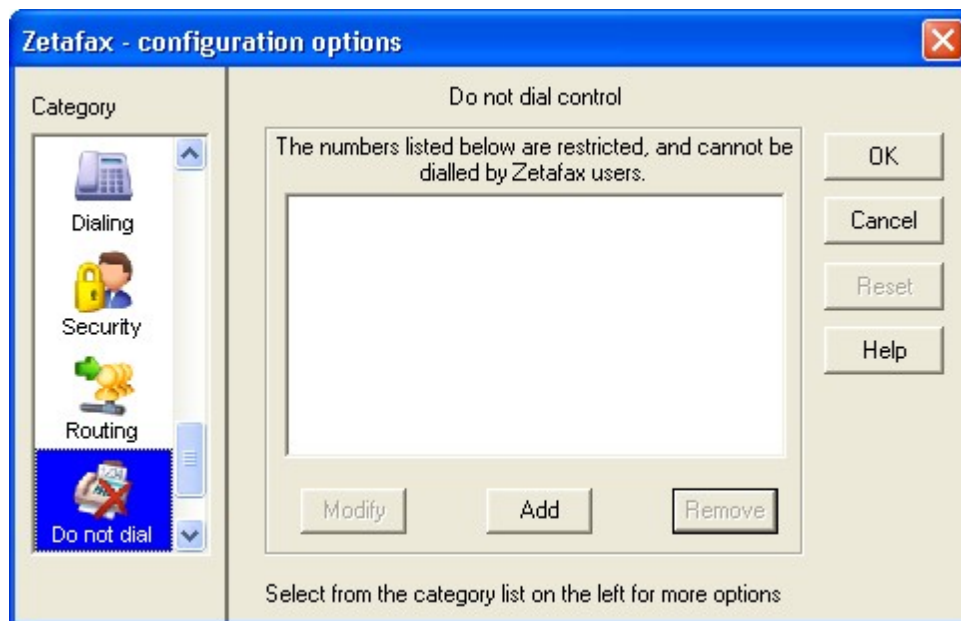
## Do not dial number restriction

The **Do not dial number restriction** option allows you to specify numbers that you do not wish to be dialed by members of your company. You can specify:

- Individual numbers that should not be dialed.
- All International communications to be blocked.
- Local area codes that should be barred such as premium rate fax lines.

To set up your Zetafax Do not dial list, follow the instructions below:

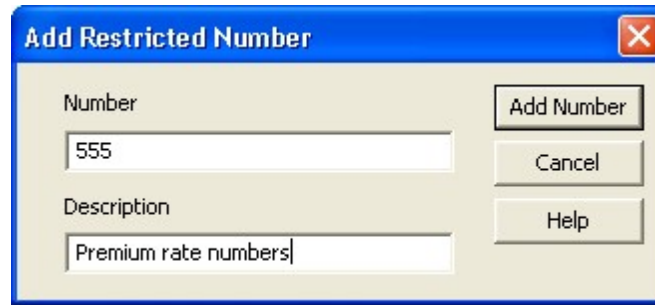
1. Open the Zetafax Configuration program.
2. Select the **Server settings** option and select the **Do not dial** Category. The control will be displayed:



Any numbers that have already been added will be displayed in this list, along with any descriptions you may have added.

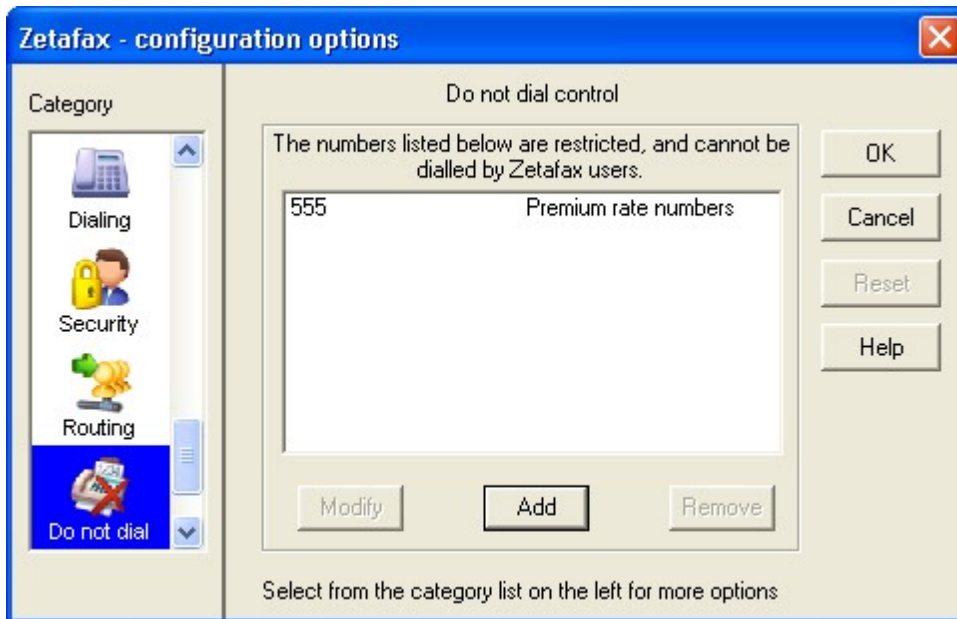
### To add a new restricted number

1. Click on the **Add** button, the **Add restricted number** dialog is displayed:



The 'Add Restricted Number' dialog box has a blue title bar with a close button. It contains two text input fields: 'Number' with the value '555' and 'Description' with the value 'Premium rate numbers'. To the right of these fields are three buttons: 'Add Number', 'Cancel', and 'Help'.

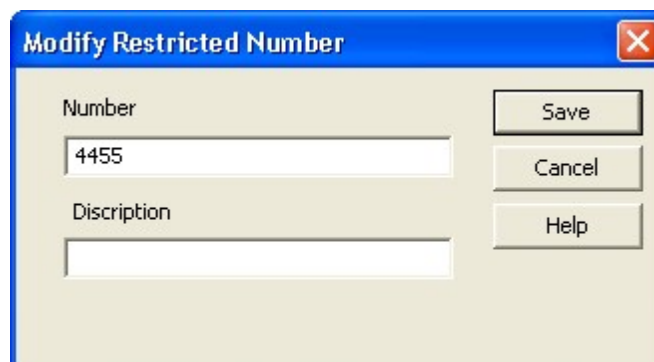
2. Type the number that you wish restrict in the **Number** box.
3. Add a description of that number if required in the **Description** box.
4. Select the **Add Number** button to save this number to your **Do not dial** list:



The 'Zetafax - configuration options' dialog box has a blue title bar with a close button. On the left is a 'Category' list with icons and labels: 'Dialing', 'Security', 'Routing', and 'Do not dial' (which is selected and highlighted in blue). The main area is titled 'Do not dial control' and contains a text box with the message 'The numbers listed below are restricted, and cannot be dialled by Zetafax users.' Below this is a list box containing '555' and 'Premium rate numbers'. At the bottom of the list box are three buttons: 'Modify', 'Add', and 'Remove'. To the right of the list box are four buttons: 'OK', 'Cancel', 'Reset', and 'Help'. At the bottom of the dialog is the text 'Select from the category list on the left for more options'.

#### To modify an existing number

1. Highlight the number you wish to change by selecting it with your left mouse button.
2. Select the **Modify** button, the **Modify restricted number** dialog is displayed:



The 'Modify Restricted Number' dialog box has a blue title bar with a close button. It contains two text input fields: 'Number' with the value '4455' and 'Discription' (note the spelling) which is empty. To the right of these fields are three buttons: 'Save', 'Cancel', and 'Help'.

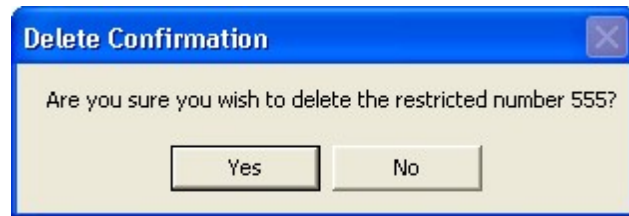
3. At this point you can make changes to either the **Number** or the **Description**.



4. When you have made your changes, select the **Save** option to save your modifications.

#### To remove a number

1. Highlight the number or numbers you wish to remove from the list by selecting them with your left mouse button.
2. Select the **Remove** button, the **Delete Confirmation** is displayed:

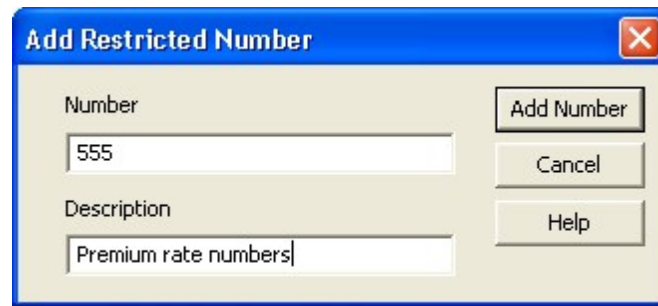


3. Select the **Yes** option to delete the numbers.

## Add restricted number

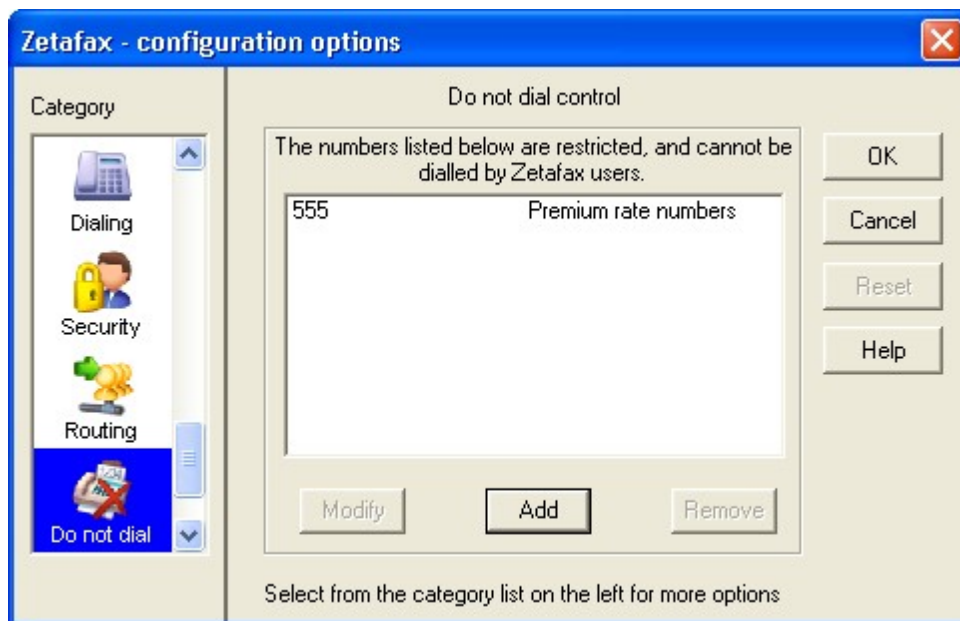
### To add a new restricted number

1. Click on the **Add** button, the **Add restricted number** dialog is displayed:



The 'Add Restricted Number' dialog box has a blue title bar with a close button. It contains two text input fields: 'Number' with the value '555' and 'Description' with the value 'Premium rate numbers'. To the right of these fields are three buttons: 'Add Number', 'Cancel', and 'Help'.

2. Type the number that you wish restrict in the **Number** box.
3. Add a description of that number if required in the **Description** box.
4. Select the **Add Number** button to save this number to your **Do not dial** list:



The 'Zetafax - configuration options' dialog box has a blue title bar with a close button. On the left is a 'Category' list with icons and labels: 'Dialing', 'Security', 'Routing', and 'Do not dial' (which is selected and highlighted in blue). The main area is titled 'Do not dial control' and contains a text box with the message 'The numbers listed below are restricted, and cannot be dialled by Zetafax users.' Below this message is a list box containing '555' and 'Premium rate numbers'. At the bottom of the list box are three buttons: 'Modify', 'Add', and 'Remove'. To the right of the list box are four buttons: 'OK', 'Cancel', 'Reset', and 'Help'. At the bottom of the dialog is the text 'Select from the category list on the left for more options'.



## Modify a restricted number

### To modify an existing number

1. Highlight the number you wish to change by selecting it with your left mouse button.
2. Select the **Modify** button, the **Modify restricted number** dialog is displayed:

A screenshot of the 'Modify Restricted Number' dialog box. It has a blue title bar with the text 'Modify Restricted Number' and a close button (X). The dialog contains two text input fields: 'Number' with the value '555 444' and 'Description' with the value 'Smith & Sons'. To the right of these fields are three buttons: 'Save', 'Cancel', and 'Help'.

3. At this point you can make changes to either the **Number** or the **Description**.
4. When you have made your changes, select the **Save** option to save your modifications.



## Junk Message Filtering

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The Junk message filter enables you to specify fax and SMS telephone numbers from which you do not want to distribute messages to your Zetafax users. It operates in the same way as the 'Automatic inward routing' based on a Sender ID (i.e. the senders fax or mobile number). You can choose from 4 different ways to deal with these messages. These are:

- Delete messages
- Archive messages
- Store the messages in a designated 'Junk' Folder.
- Archive and store messages in a designated 'Junk' Folder.

[Next >](#)

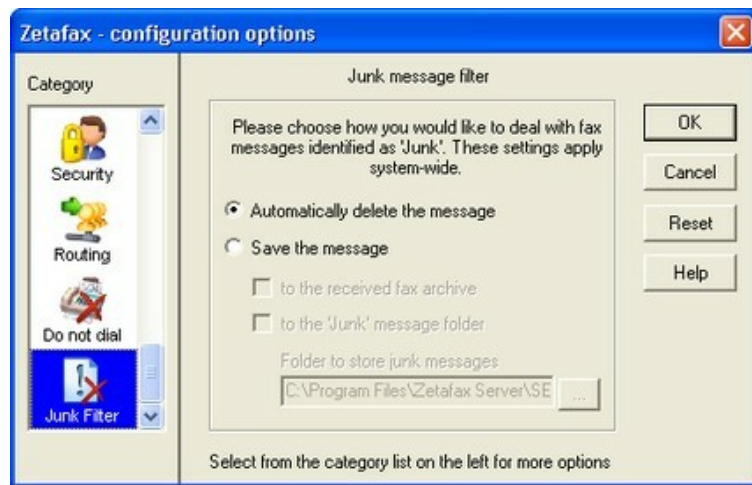


## Setting up junk message filtering

To enable junk message filtering start up the Zetafax Configuration program and navigate to 'Junk message filter' in the 'Server Settings' list.



Double clicking this will display the 'Junk message filter' options dialog. This allows you to specify what action you want to take with junk messages.



### Automatically delete the message

Selecting this option deletes all junk messages.

### Copy the message to the received fax archive

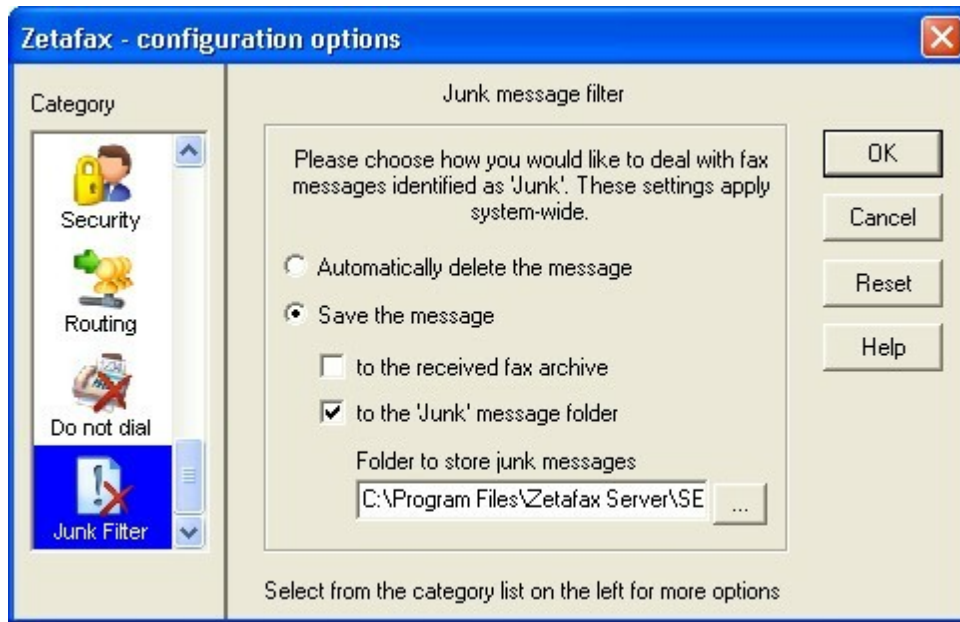
Selecting this option archives junk messages.

In order for this setting to work, archiving of received messages must be enabled. To do this, you must navigate to the 'Archiving of sent and received messages' in the 'Server Settings' and enable receiving of received messages. [Click here for information on how to do this.](#)

### Copy the message to the 'Junk' message folder

Selecting this option allow you to specify a specific folder for storing junk messages.

On selecting this option the 'Folder to store junk messages' edit box will become enabled and you can browse to the desired folder using the browse button "..." or simply type in the full folder path.



#### Archive and Copy Junk Messages to 'Junk' folder

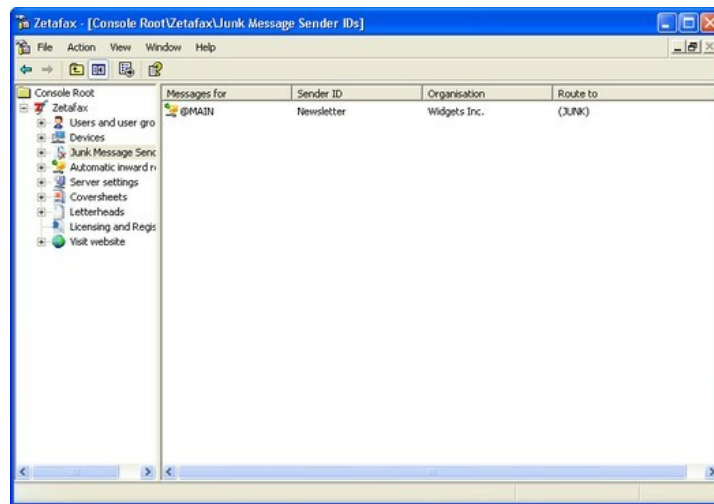
It is possible to both archive and copy a junk message to the 'Junk' folder. This allows you to keep a record of a received junk fax, whilst preventing that fax from reaching it's desired destination.

[Next >](#)



## Creating junk message filter rules

To identify messages as junk you must specify a junk message filter rule for each sender you have identified as a junk sender. This is done in the 'Junk' rules list.



### Adding a junk rule

To add a junk rule simply right click on the 'Junk' node or right click in empty space on the junk rules list. This will display the 'New junk message routing rule' dialog shown below.



### Message for

In this drop down you specify for whom this rule applies. It will contain a list of all Zetafax users and groups as well as an 'All' users option and an '(unaddressed)' option. Rules can be specific to an individual user, for example, by selecting an individual user from the Message for drop down, then messages for USER1 from 5551234 would be routed to '(junk)' whereas all other users faxes from that number to other users would be delivered as normal.

### Sender ID

Enter the FAX or SMS telephone number from which you wish to identify messages as junk.

**Organization name**

The Organization name allows you to specify an alias for the Sender ID number.

**Route to**

This is always '(junk)' and indicates that this routing rule is routed depending on the junk action setting described in section 1.

**Editing a Junk Rule**

To edit a junk rule simply right click on the rule you wish to edit in the junk rules list and select 'Edit' from the drop down list. This will display the 'Edit junk message routing rule' dialog shown below.



The screenshot shows a dialog box titled "Edit junk message routing rule" with a close button (X) in the top right corner. The dialog contains four fields: "Messages for" with a dropdown menu showing "(unaddressed)", "Sender ID" with a text box containing "555 787 5645", "Organization name" with a text box containing "Spammers Plc.", and "Route to" with a dropdown menu showing "(JUNK)". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

**Deleting a Junk Rule**

To delete a junk rule simply right click on the rule you wish to delete in the junk rules list and select 'Delete' from the drop down list. Alternatively, select the junk rule and press the delete key on your keyboard.

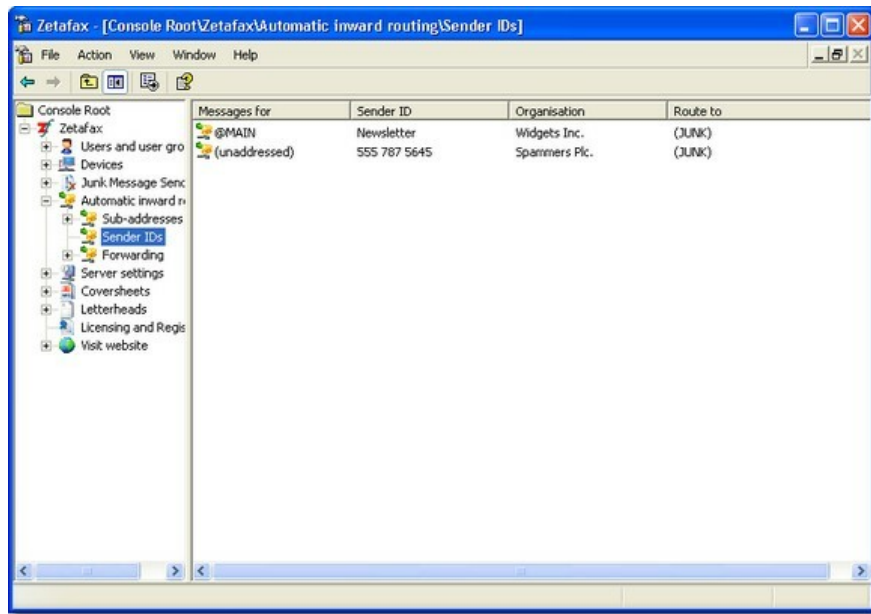
[Next >](#)





## Automatic inward routing of junk messages

As mentioned before a junk message filter rule is actually a specialized type of sender ID routing rule. This means that you can view all your routing rules, regular and junk, in the sender ID routing rule list in the 'Automatic inward routing' settings. To find this list navigate to the 'Automatic inward routing' node and select 'Sender ID' from the sub nodes (shown below).



This list operates in exactly the same way as the junk rule list described in section 2. You can 'Add', 'Edit' and 'Delete' routing rules including junk rules.

[Next >](#)



## User specific junk rules

As mentioned before routing rules and therefore junk routing rules can be user specific. To view the junk rules specific to a particular user navigate to 'Users and user groups', 'Zetafax Users', right click on the desired user and select 'Edit' from the pop-up menu. This displays the 'Zetafax User Details' dialog.

The 'Zetafax User Details' dialog box is shown. It contains the following fields and controls:

- Zetafax user name: SSMITH
- Network login id: SSMITH
- Full name: Sam Smith
- Member of group: @MAIN (dropdown menu) with a 'Routing...' button next to it.
- ☐ Allow sending from email gateway
  - ☐ Include faxes sent by Zetafax client in Outlook Zetafax Outbox - Exch 5.5 only
  - ☐ Forward received messages via email
- Email user name: (text field) with a 'Test' button.
- Buttons: Send time..., Dial allowed..., Permissions..., Printing..., Reset, Help, OK, Cancel.

Clicking the 'Routing...' button displays the users 'Inward routing rules' dialog. Selecting the 'Sender ID' radio button displays the Sender ID routing rules that include the junk message rules as shown below.

**Inward routing rules**

☐ Sub-address - Routing using addressing information sent with the fax

☒ Sender ID - Routing based on who the sender of the fax is

☐ Forwarding - Automatic forwarding from one user to another

Inward routing rules for user SSMITH

SSMITH	Spammers Plc. (555 787 5645)	to (JUNK)
--------	------------------------------	-----------

Sort by ☒ Message for ☐ Sender ID ☐ Organization ☐ Route to

Messages for: SSMITH - Sam Smith

Sender ID: 555 787 5645

Organization name: Spammers Plc.

Route to: (JUNK)

Modify Add Remove Help Close

This dialog, like the others before, allows you to 'Add', 'Edit' or 'Delete' junk routing rules. To add a junk rule, simply populate the 'Message for', 'Sender ID', 'Organization name' and set the 'Route to' drop down to '(junk)' and then click the Add key. If the rule is invalid or already exists the 'Add' button will not become enabled. Similarly editing a rule simply select the rule from the list, edit the details and click the 'Modify' button. Again the 'Modify' button will not become enabled if the edited rule is invalid or already exists. To delete a rule, select the rule from the list and click the 'Remove' button.



## Fax Relay

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Fax Relay functionality requires the optional [Fax Relay add-on](#), with Fax Relay configured faxes can be submitted from local fax machines or Multifunction Devices (MFD) for sending via the Zetafax Server. Systems using Fax Relay require the Zetafax FoIP Connector, either Standard Edition or SR140 Edition. The number of channels required depends on the number of concurrent calls which are required from Fax Relay devices – others users will receive a number busy tone if trying to send using Fax Relay.

Fax Relay works with any of the supported outbound fax devices – fax boards, fax modems and Fax over IP. Systems do not need to migrate to using Fax over IP for external calls, an existing Zetafax system using fax boards could implement Fax Relay simply by adding a Fax over IP Connector and suitable hardware for the fax machines, whilst retaining the existing fax boards and external fax lines.

**Note:** Systems using Fax over IP for external transmission must use the same edition of the Zetafax FoIP Connector for Fax Relay – installing both editions on the same Zetafax server is not currently supported.

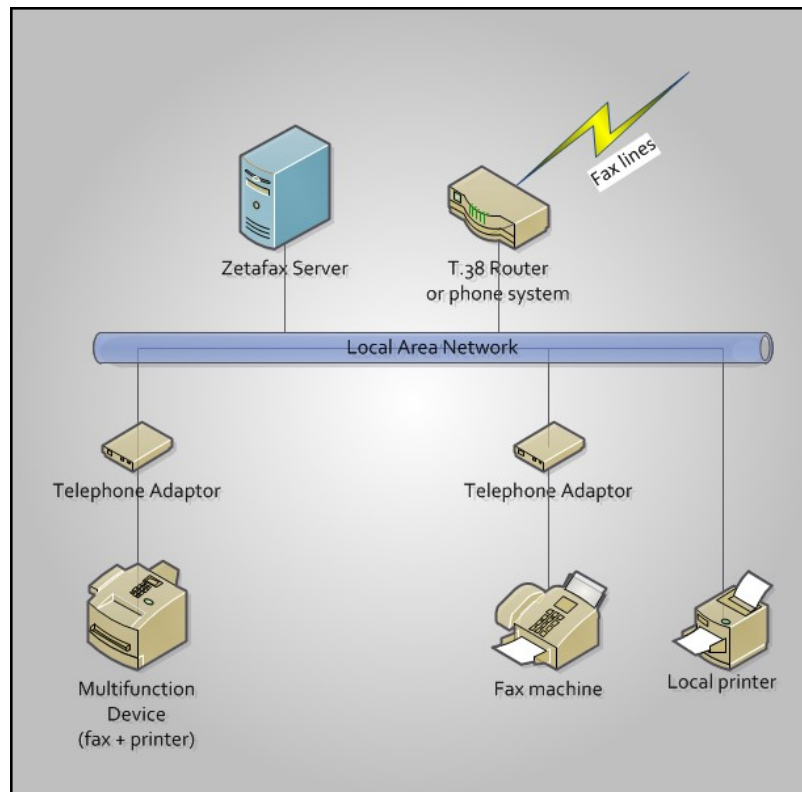
These gateway units are typically configured with the IP address of the Zetafax Server, so that all calls made from the fax machine are directed to the Zetafax Server for onward relay. The “dial plan” of each unit is configured to pass a device ID (used for anonymous sending) and to give initial validation for user IDs (for sending by Zetafax users). The list of supported units and setup instructions is available on the [Equisys website](#).

### Required Hardware Setup

The Fax Relay feature uses Fax over IP (FoIP or T.38) technology to enable each fax machine or Multifunction Device (MFD) to communicate with the Zetafax Server for sending faxes. Each fax machine or Multifunction Device needs to be connected to a T.38 router - either an individual telephone adapter unit situated next to each device, or using a shared router situated in a central location. Both options are shown in more detail below.

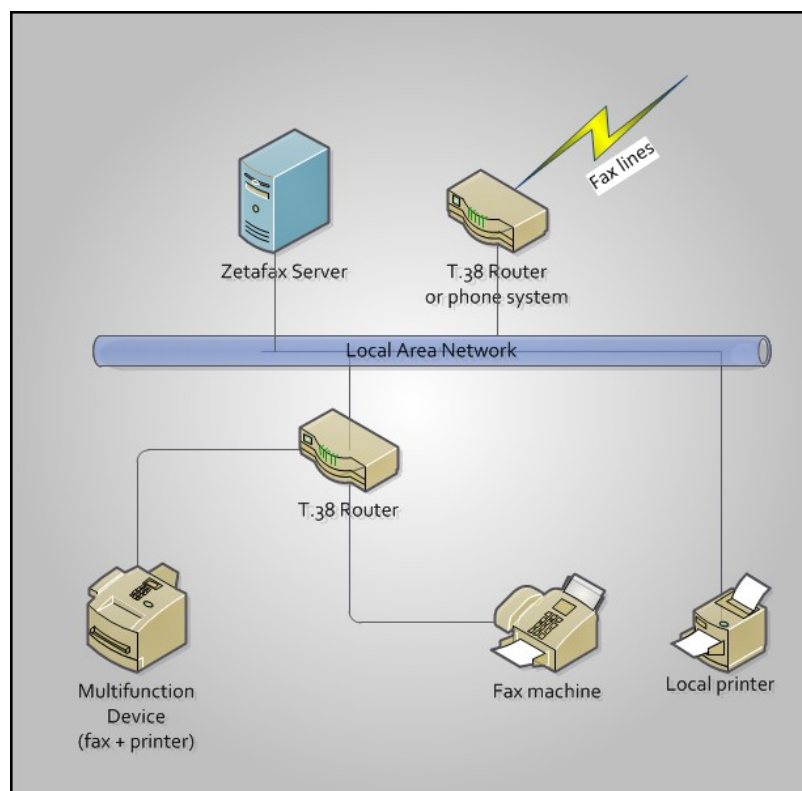
### Individual Telephone Adapter

For the individual unit configuration, a single or dual port T.38 Telephone Adaptor unit is required next to the fax machine or MFD, this needs to be connected to the phone line from the fax machine and a local area network (LAN) Ethernet connection. Each Telephone Adaptor unit will typically be used for a single fax machine, though in some cases two adjacent fax machines might be connected to the same Telephone Adaptor. The Zetafax Server may be configured to use conventional fax boards for sending and receiving external faxes (as shown at the start of this section), or to use the Zetafax FoIP Connector for external faxing.



#### Shared Unit

The shared unit configuration uses a multiple port T.38 gateway unit connected in a central location which is connected to the phone lines from multiple fax machines and a LAN Ethernet connection. In sites which are using Fax over IP for external faxing this may either use the same gateway unit for both functions (external faxing and fax relay), or use a separate gateway as shown below.



### Configuring Fax Relay

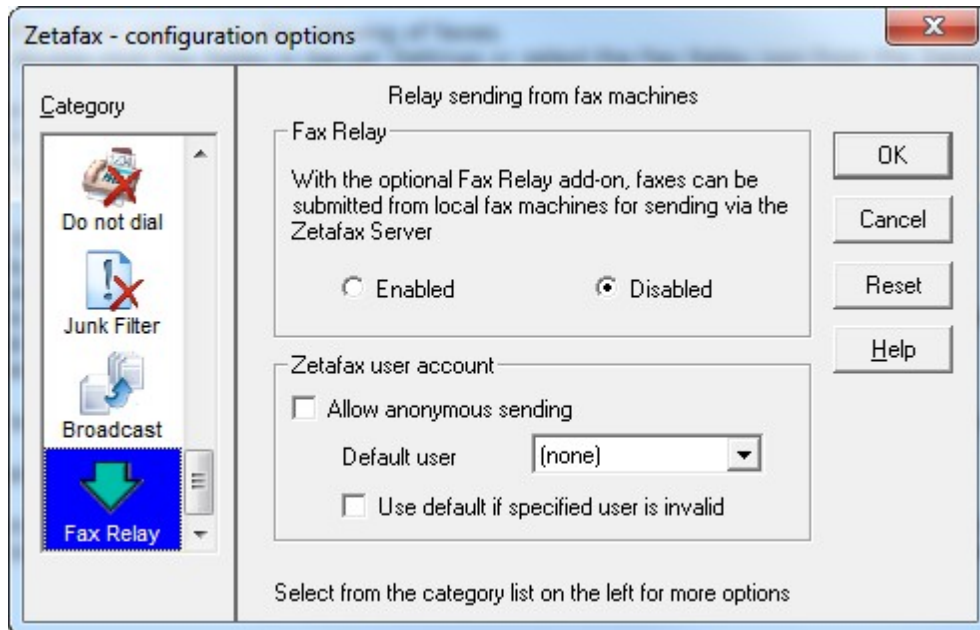
To configure Fax Relay you need to do the following:

- Activate the feature in the Zetafax Configuration [settings](#)
- Create the [Dial plan](#) for the specific device
- Create a Zetafax user account
- Configure Anonymous sending as required



## Fax Relay Settings

To access the Fax Relay settings open the **Zetafax Configuration program** and select **Server Settings** and then **Fax Relay**, the configuration options window will appear.



This provides configuration options for the relaying of faxes using Zetafax.

### Enabled or Disabled Fax Relay

These radio buttons allow fax relay to be enabled or disabled.

**Note:** A Fax Relay add-on licence must be applied before Fax Relay can be enabled.

### Allow anonymous sending

This option allows the submission of faxes from a local fax machine without specifying a user DID to use. This will result in the default user account being used, the standard behaviour is for Zetafax to store all sent messages in the user's outbox until cleared.

### Default user

This is the default Zetafax User that will be used when faxes are submitted anonymously from a local fax machine.

**Note:** To enable Fax Relay a default user must be selected.

### Use default if specified user is invalid

Check this box to use the fax relay default user to send faxes that are submitted from a local fax machine with an unrecognised user DID specified in the dialled number.

**Note:** If this box is not checked, faxes that are submitted with a DID that cannot be resolved to a valid Zetafax User will be rejected by the Zetafax Server. This will also happen if the DID entered is for a Zetafax Group instead of a Zetafax User.

### Reset

Sets the fax relay options to their default values.

**Note:** The settings are not saved until either OK is clicked or another category is selected from the

scrollable options on the left.





## Dial plans

The dial plan is the settings added to a specific gateway to enable the successful Fax Relay operation. Check the [Equisys website](#) for details on supported devices and how to configure that specific device.

For the Zetafax Server to process a Fax Relay transmission it requires a Device ID which is set using the dial plan in the router device used to connect the fax device to the network. Dial plans are rules used to modify phone numbers which are entered.

They are typically set independently for each device, and for each telephone port on a device (ie for each connected Fax Relay fax device). For Fax Relay, a typical dial plan is as follows:

Destination number entered	Number passed to Zetafax Server	Comment
<4 digit code> * <6 or more digits>	<4 digit code> * <digits>	Relay from Zetafax User
<4 digit code>	<4 digit code>	Network scan to Zetafax User Inbox
<6 or more digits>	<Device ID> * <digits>	Anonymous send
Other	(none)	Call not forwarded to Zetafax Server

In this example the dial plan imposes rules that all User IDs are exactly 4 digits, and that external phone numbers are at least 6 digits long. Users entering numbers outside those ranges will get immediate feedback of their mistake – typically by hearing a “number unobtainable” tone.

As an additional check, the Zetafax Server can be configured so that it will reject calls with an invalid (unrecognised) User ID or Device ID without answering the call.

It is recommended that Device IDs are a different length from User IDs to help with identifying them in the Zetafax Configuration program – eg on a system using 4 digit User IDs then the administrator may use Device IDs which are 3 digits.



## Device User Account Setup

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Having configured your gateway and fax device with a dial plan you need to configure a Zetafax user account for that device and provide the settings to enable the Zetafax Server to recognize it.

### Configuring the device account

- Create a Zetafax User Account using the [usual steps](#).
- On creating the Zetafax user you will be presented with the Zetafax users screen.
- Select the user by double clicking on it to display the Zetafax User Details screen.
- Click the Routing button and the Inward routing rules options will appear.
- select the Sub-address field and add the DID number you have specified in your Dial plan for the device.
- Click Add when finished and then Close.



## Anonymous Sending Setup

When Fax Relay messages are sent anonymously, the Zetafax Server requires an ID to identify the device from which the message was sent. This is provided by the [dial plan](#) set on the device from which the fax originated, please see the [Equisys Website](#) for further details on setting up specific devices.

Each device is configured so that a Device ID is added to the dialled number if no User ID has been specified. The administrator configures a Zetafax User account for each Fax Relay device, specifying the Device ID as the sub-address routing parameter for each user. The message is then sent from that account and the messages stored in the sent items for that account. Associating the device with a user account, in this way you can specify the printer used for printing status messages on message completion. It also helps in identifying messages sent anonymously in the sent message archive and billing log.

### Setting up sent fax confirmations

To ensure that users are notified of the status of the sent fax we need to setup the user account of the device to print a status report when sending anonymous faxes.

- On creating the Zetafax user you will be presented with the Zetafax users screen.
- Select the user by double clicking on it to display the Zetafax User Details screen.
- Select the Printing button and then in the Sent faxes section uncheck the Use default server settings option.
- Select Print fax status and then click the Select button.
- Select the device from the Printer to use drop down menu.

On sending a fax anonymously from this device a status report will now be printed.

### Archive management

As these users accounts are not managed by a user you may wish not to store these messages. As they can build up over time without a user viewing and clearing them in the Zetafax Client, to do this simply follow the steps below:

- Go to <ZFAX>\USERS\<USERNAME>\Z-DB
- Open the USER.INI file
- Add the following lines to the bottom of this file
  - [RELAY]
  - Delete: YES
- Save the file. Faxes are now deleted from this user's outbox if the Fax Relay feature is enabled.
- There is a second option that allows fax relay items to be saved to the sent archive. The additional INI file line can be added to the USER.INI as above (in the [RELAY] section):
  - SentItems: NO

**Note:** If sent items and delete functionality are not required, the lines can either be deleted from the INI file, or the options changed to read 'NO'



## Zetafax Duo

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Zetafax Duo adds the power and features of Zetadocs PDF to Zetafax 2012, providing a single interface that lets you build multi-part documents (such as sales quotations, orders and statements) as PDFs and then send them securely by email as well as fax.

You can merge documents from different sources into a single, personalized PDF which can then be sent to one or more recipients by email and by fax. Email documents are sent in PDF format using Microsoft Outlook, while fax documents are sent as TIFF images via the central Zetafax Server

For more information about Zetafax Duo, please see the [Equisys Website](#).



## How do I install the Zetafax Client Applications using group policy?

Using the following information, it is possible to remotely install the Zetafax Client Applications across a network using group policy in a Windows 2003 or later active directory domain.

### Before starting

Before you are able to install the Zetafax Client Applications using group policy, please ensure that the following steps have been carried out:

- Zetafax Server has been installed and configured on a machine within your network.
- [The Zetafax Server folder has been shared out using the Share wizard in Zetafax Server configuration.](#)
- Zetafax Client Applications has been correctly installed on the Zetafax Server system.
- Users on Windows Server 2012 and 2008 should ensure the .Net 3.5 Framework has been installed.

### Installing the Client:

1. Start up Active Directory Users and Computers on a system within your network (this is normally found on a Domain controller system and you need to login with Domain administrator privileges).
2. Right click domain, and select properties then click on the Group Policy tab.

Note: Users on Windows Server 2012 and 2008 R2 should instead go to Start > Administrative Tools > Group Policy Management.

3. Select default domain policy and click edit.
4. Browse to Computer configuration/Policies/Administrative templates/windows components/windows installer.
5. Double click "Always install with elevated privileges" and set it to enabled.
6. Browse to User configuration/Administrative templates/windows components/windows installer.
7. Double click "Always install with elevated privileges" and set it to enabled.

- (a) Browse to computer configuration/Software Settings/Software installations.
- (b) Click Action, New, Package...
- (c) Browse to the Zetafax Printer.msi in the \Zetafax\ZF Printer for Group Policy\ folder.

(NOTE: you must browse to it as a valid network path that can be resolved by all client Systems)

If you do not have the ZetafaxPrinter.msi, you can download it from the following link:

<http://download.equisys.com/pub/zetafax/v2012/ZFPrinterforGroupPolicy.zip>

8. Right click the Zetafax Printer package you have just created and select properties.
9. Click on the deployment tab and verify that "install this application at logon is checked (you may need to click the "assigned" radio button to enable this option).

- (a) Browse to user configuration/Software Settings/Software installations.
- (b) Click Action, New, Package...
- (c) Browse to \Zfax\system\folder

(NOTE: you must browse to it as a valid network path that can be resolved by all client Systems)

10. Add the ISScript1150.Msi and the Default.msi to the package and press ok.
11. Select assigned then click OK.
12. Right click the Zetafax Client Applications package you have just created and select properties.
13. Click on the deployment tab and verify that "install this application at logon" is checked (you may need to click the "assigned" radio button to enable this option).



## How do I install the Zetafax Client Applications updates using group policy?

Using the following information, it is possible to remotely install the Zetafax Client Applications updates using group policy in a Windows 2003 or later active directory domain.

### Before starting

Please assure that the following procedures have been completed:

- Zetafax Server has been installed and configured on a machine within your network. For more information on how to do this, please refer to the [Installation section](#).
- [The Zetafax Server folder has been shared out using the Share wizard in Zetafax Server configuration](#).
- The Zetafax update installation has been downloaded from the Updates website and shared out within your network.
- Users on Windows Server 2012 and 2008 should ensure the .Net 3.5 Framework has been installed.

**Note:** Before installing the Zetafax Client Applications updates, you need to remove the existing Zetafax Client Group Policy object. This will prevent two Zetafax Client instances appearing in the Add or Remove Programs list.

### Installing the client applications updates:

To roll out the Zetafax Client Applications updates into your active directory domain. Follow these steps:

1. Start up Active Directory Users and Computers on a system within your network (this is normal found on a Domain controller system and you need to login with Domain administrator privileges).
2. Right click **domain**, and select **properties** then click on the **Group Policy** tab.
3. Select default domain policy and click **edit**.
4. Browse to **Computer configuration/Policies/Administrative templates/windows components/ windows installer**.
5. Double click "**Always install with elevated privileges**" and set it to enabled.
6. Browse to **User configuration/Administrative templates/windows components/ windows installer**.
7. Double click "**Always install with elevated privileges**" and set it to **enabled**.
  - (a) Browse to **computer configuration/Software Settings/Software installations**,
  - (b) Click **Action, New, Package...**
  - (c) Browse to the **Zetafax Printer.msi** in the **\Zetafax\ZF Printer for Group Policy\** folder.

(NOTE: you must browse to it as a valid network path that can be resolved by all client Systems)

If you do not have the ZetafaxPrinter.msi, you can download it from the following link:

<http://download.equisys.com/pub/zetafax/v2012/ZFPrinterforGroupPolicy.zip>

8. Right click the **Zetafax Printer package** you have just created and select **properties**.
9. Click on the deployment tab and verify that "**install this application at logon**" is checked (you may need to click the "assigned" radio button to enable this option).
  - (a) Browse to **user configuration/Software Settings/Software installations**.
  - (b) Click **Action, New, Package...**
  - (c) Browse to **\Zfax\system\** folder

(NOTE: you must browse to it as a valid network path that can be resolved by all client Systems)

10. Add the **ISScript1150.Msi** and the **Default.msi** to the package and press **ok**.

11. Select **assigned** then click **OK**.
12. Right click the **Zetafax Client Applications package** you have just created and select **properties**.
13. Click on the **deployment tab** and verify that "**install this application at logon**" is checked (you may need to click the "**assigned**" radio button to enable this option).





## How to set up Direct Dial Inward routing

Companies with a PBX phone system where extensions can be dialed directly from outside, rather than via the switchboard, use technology called Direct Dial Inward (DDI) - sometimes called Direct Inward Dial (DID).

Zetafax supports DDI routing as standard.

### To set up Direct Dial Inward Routing

1. Open the Zetafax Configuration Program.
2. Select the **Automatic Inward Routing** option.
3. Select the **Sub-addresses** option.

This will display any Direct Dial accounts that have already been set up.

4. Right click your mouse button and select the **Add** option.
5. The sub-address routing rule dialog will be displayed.
6. Type in the extension number you wish a particular user or group to use in the **Sub-address** text box.
7. Select the user and group this number will be linked to from the **Route to** drop down list.
8. Click on **OK** to save this routing rule.

You can add as many different numbers as you require.



## Setup Custom Actions

Zetafax includes the ability to configure up to nine Custom Actions in the Zetafax Client. These actions are listed on a dedicated Custom button which is added to the Message ribbon tab in the Zetafax Client. Custom Actions are designed for users who need to perform additional processing on a received fax, for example, passing the fax to an electronic records management system for processing or storage.

The custom actions are specified independently for each user on each computer, allowing actions to be tailored for individual user roles, or for situations where the required application is not stored in the same location on each client computer.

### Configuring a Custom Action

- Locate the **ZFCLIENT.ini** file this is usually located at: **C:\Users\<userID>\AppData\Roaming\Equisys\Zetafax Client**
- Open the file using a text editor such as Notepad.
- At the bottom of the file, below the Help location entry, paste the code below for each Custom Action you wish to create.

#### **Tool1: Description, "Full program path" "Command line parameters"**

- This consists of four properties:
  1. Tool Number, Identifies the order of the Custom Actions 1-9
  2. Description, Text which is displayed in the button drop down list in the Zetafax Client
  3. Full program path, Full path of the program to be launched when the action is selected
  4. Command line parameters, parameters to be supplied to the application, which can include the full pathname of the fax image file
- For example should we wish to setup a Custom Action to open a selected item from the Zetafax client using Notepad we would adjust the code to:

#### **Tool1: Open as text with Notepad, "c:\windows\notepad.exe" "%file%"**

- Where **%file%** identifies the file currently selected in the Zetafax Client.
- Likewise if you wish to add another Custom Action to open the item using a Photo Editor you could adjust the code to:

Tool2: Open with Photo Editor, "C:\Program Files\Common Files\Microsoft Shared\PhotoEd\Photoed.exe" "%file%"

- Save the file when finished and restart the Zetafax Client, the new Custom Actions will then appear in the Custom drop down option on the Message ribbon tab.



## Troubleshooting Area

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These guides have been provided to help you diagnose and repair

[Modem troubleshooting](#)

[Email Gateway troubleshooting](#)

[Document Rendering troubleshooting](#)



## Email Gateway Troubleshooting

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This section is designed to address some of the most common problems people face when using the Email Gateway:

### Incoming faxes are being passed to the email gateway but not appearing in my Outlook client.

Is Zetafax running as a service or as an application? If you are unsure check the Zetafax Server window. Look at the top left hand corner of the window if it states **Zetafax Server'** then it will be running as an application. If it is running as a service then it will display **Zetafax Server monitor'**.

If Zetafax is running as a service then stop the service and run it as an application. If the messages are now appearing in your Inbox then you will need to check the account permissions that Zetafax is running under. The account needs to have specific rights to write/delete files in the Zetafax connector folder. This is especially important if the Zetafax Server is not on the same machine as your exchange server. Normally a domain administrator account should be used.

### Faxes are still not coming through even when Zetafax is running as an application and the interactive user account has domain admin rights.

Check directory `zfax \server\mailout` (where `zfax` is the location of your Zetafax installation). In this folder check to see if there are any files with a \$ extension e.g. `~MAIL080.$`. This file type is a corrupt fax.

Delete this file and restart the Zetafax Server, faxes should now start going through to the email gateway and appearing in your inbox.

### There are no files with a \$ extension but there are build up of .sin and .ini files in the Zfax\server\mailout folder.

Arrange these files by Date/Modified and move the oldest files out of the `zfax \server\mailout` directory to another location (e.g. into a temporary folder on the desktop).

If faxes start to go through move the files back again, however if after copying any of these files these files stop new faxes being processed then these files have been corrupted and should be deleted.

### When I send a fax it remains in my Outbox in my outlook client.

Check to see if the driver is enabled in Email gateway setting. This can be found in Zetafax configuration, Server setting, Mail Gateway, configure.



## Document Rendering Troubleshooting

When using the e-mail gateway to send faxes it is possible to send document attachments which are converted into faxes using the **Mail Rendering Subsystem'** printer on the Zetafax Server system. Some times the process used to convert attachments fails. This document describes the process and details procedures to troubleshoot problems that you may be experiencing with the mail rendering subsystem.

**Note:** for the purpose of this troubleshooting area we are using a Microsoft word document (<FileName.Doc>) as an example.

The process of converting an attached file (including **Rich Text Format .RTF** ) is as follows:

1. After the user sends the email containing the attachment, it passes from the email sever into the Zetafax Server application.
2. The Email is separated from the attachment which is then opened on the Zetafax Server system. When it does this it places the files temporarily into the **Zfax \Mail\ST** folder (where Zfax is the location of the Zetafax Server files).
3. Using an application that is able to view that particular file type, the attachment is printed to the Mail Rendering Subsystem printer e.g. Word is normally used to print .DOC and .RTF attachments.
4. The Mail Rendering Subsystem printer creates a **.TIFF** image of the attachment file in the **Zfax \MAIL\ST** folder.
5. Zetafax picks up the .TIFF image file and sends it as part of the final fax.

In most installations this process runs smoothly. However this document describes a process to troubleshoot rendering problems should they arise.

### What are the symptoms?

The most common symptoms of rendering issues (as opposed to, say, e-mail gateway problems) are the following:

- Sending a plain text message with no attachment works correctly.
- Messages in Rich text or HTML format, or messages with an attachment, are rejected with one of the following errors on the Zetafax Server or in the rejected message returned to your mailbox:
- "Unable to process message"
- "Internal error - invalid parameters"
- An error code number starting with 63 (e.g. 63254).

If the problem is a rendering problem, it will affect all e-mail gateway users. If only one user is affected, there may be a problem with that user's settings, with the file, or type of attachment they are sending.

### Are any messages sent successfully?

Before you troubleshoot rendering, you should ensure that the e-mail gateway is sending faxes correctly. Send a plain text e-mail as a fax (not "Rich Text" or "HTML" - see your mail client's documentation on how to do this), and verify that it is sent successfully.

If the plain text fax is not sent, then you probably have an e-mail gateway, Zetafax Server, or connector problem, which is not covered in this document. If the plain text fax is sent successfully, continue with this troubleshooting guide.

### Does rendering fail when the Zetafax Server runs as an application?

In some cases, rendering may only fail if the Zetafax Server is running as a service. If you are running Zetafax as a service, you should check whether rendering works when you run the Zetafax Server as an application:

1. Go to the **Control Panel** , and then open **Services**.
2. Highlight the **Zetafax Server service'** and click on the Stop button.
3. Close the **Services** window.
4. Go to **Start , Programs , Zetafax** , and click on **Zetafax Server'**.

5. The Zetafax Server screen will appear with **Zetafax Server'** in the title bar (not **Zetafax Server Monitor'** )

Test whether rendering works in this state. Please note that when Zetafax is running as an application, the rendering applications will open up on screen, which may disrupt any work you are doing on the server desktop.

If rendering works correctly with the Zetafax Server running as an application, check whether the account the service is using is causing problems:

1. Check what user account you are currently logged into Windows as.
2. Change the Zetafax Server service account to that same user, and start the service.
3. Test whether rendering now works. If it does, you either need to change the account used for the service, or you need to increase the permissions of the account the service currently uses.

**Note:** If your e-mail server is on a different machine than the Zetafax Server, the service will need to run with an account, which has access to other machines i.e. your mail server (so LocalSystem is not suitable).

### Does rendering fail for all attachments?

If a particular document fails to render, check rendering with a different document from the same application.

**Note:** Macros, small margins and non-conventional paper sizes in the document you are trying to send may stop the application from rendering correctly.

### Does rendering fail for all applications?

If you usually only send one type of attachment (for example, Microsoft Word documents), check whether other types of attachments fail as well. If only one type of attachment fails, there may be something wrong with that application's installation on the Zetafax Server.

Here are some known issues with the third-party applications Zetafax uses for rendering. If the Zetafax Server is running as a service, run it as an application to check if these problems are occurring:

- The Office Assistant or an error message appears when you open the application on the Zetafax Server. Disable the Office Assistant or troubleshoot the error message to solve the problem.
- Adobe Acrobat 4.05 has been installed on the server at some point. There was a flaw in this version of Acrobat which stopped rendering from working. Upgrading to Acrobat 5.0 does not fix this problem, because parts of 4.05 will remain intact. The solution is to install Acrobat 3.0. This problem does not affect clean installations of Acrobat 3.0, 4.0 and 5.0.
- Large Adobe Acrobat PDFs can cause problems. Use the Document conversion engine to render PDF documents. This add-on supports over 250 file extensions and is a purchasable add-on to Zetafax.

### Does printing to the Mail Rendering Subsystem printer work?

Open a document in the application that is failing, and print it to the Mail Rendering Subsystem printer. This should create a TIFF file in the *Zfax \MAIL\ST* folder.

If the Mail Rendering Subsystem printer is not available, or a TIFF image is not created when you print to it, then there is a problem with the Mail Rendering Subsystem printer. [Click here for help with the Mail Rendering Subsystem printer.](#)

### Does right-clicking on a file and selecting Fax Convert work?

If the Mail Rendering Subsystem is working correctly, then there may be a problem with the command used to print the document from the e-mail gateway.

In order to call the relevant application during rendering, the Zetafax Configuration normally adds a "verb" called Fax Convert to the enabled applications. In some cases, this verb may be incorrect or became corrupt.

To test whether this command is working:

1. Create a plain file from the application you are trying to render to a location on the Zetafax Server machine.
  2. Place the file in the *Zfax \MAIL\ST* folder, then close all applications that may still be open.
  3. Right-click on the file and select **Fax Convert** . You should see the file open, a print to an **"OEM Printer"** dialog box appear briefly (on some systems this may be too fast to notice), and then close.
  4. Check the contents of *Zfax \MAIL\ST* folder on the Zetafax Server. A new TIFF image should be in this folder. Open it and check that it is a copy of the file you printed.
- 
1. If the application doesn't open, or the file doesn't print, there may be something wrong with the Fax Convert command. You can check the contents of the Fax Convert command by checking the following:
    2. Open Windows Explorer. Go to **Tools , Folder Options....**
    3. Click on **File Types** , and then highlight the extension for the type of file you're having problems with (e.g. **.DOC Microsoft Word Document** if you're having problems with Microsoft Word). Click on **Advanced**.
    4. In the next dialog, highlight **Fax Convert** , and then click on **Edit....**
    5. Check the ensuing dialog for obvious errors, like the wrong path in the "Application to perform action".

If at this point, you are unable to fix the problem yourself, you will need to contact Technical Support for further assistance.

### Contacting Technical Support about rendering issues

Before contacting Technical Support, make sure you have run through every stage in this document. When you do contact Technical Support, you will need to provide the following items:

1. The version of the Zetafax Server, e-mail gateway, and Zetafax connector (if you are using Exchange), as well as the versions of all the applications you are rendering with. If you are using another mail server we require the version of the server, e-mail gateway and mail server as well as the applications you are rendering with.
2. The answers to all the questions asked in this document.
3. E-mail gateway trace logs covering a time where rendering failed. A server.log file covering a time where rendering failed. This can be found in *Zfax \SERVER\Z-DB* on the Zetafax Server.

This will allow the support team to better help you with your current problem.



## Least Cost Routing - Troubleshooting

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**Symptom:** Can't click the **Links...** button from the **LCR** page of **Server settings** to configure a link

**Solution:**

Make sure that the General settings have been configured first.

**Symptom:** When configuring a link, the wrong ID was typed and now it can't be changed

**Solution:**

Select the link from the list in the **Links** dialog. Choose **Copy** to create a new link, with all the settings from the old one. Correct the ID and save the link, then delete the original link.

**Symptom:** When trying to configure a **WAN** or **Email** link, the chosen link type is not available

**Solution:**

Check that **WAN** and **Email** links have been enabled in **LCR - General settings**.

**Symptom:** When clicking the **Test** button for a **Lotus Notes Email** link, an error 'Unable to locate Nnotes.dll' appears

**Solution:**

Check that the path of the main Lotus Notes folder has been included in your Windows environment settings.

**Symptom:** Link doesn't start up properly - **WAN** link

**Solution:**

Check that both servers are running. Check the **WAN Inbox** settings in **LCR General settings** at both ends. Check that both servers have the necessary access privileges for the folders (use the **Test** function in the **Edit link** dialog to test the link).

**Symptom:** Link doesn't start up properly - **Email** link

**Solution:**

Check that both servers are running. Check that the email account details for both servers in **LCR General settings**. Use the **Test** function in the **Link Edit** dialog to send a test message.

**Symptom:** Server program **ROUTER** reports that it received message files that failed a security check

**Solution:**

Check that the **link password** has been correctly entered at both ends of the link.

**Symptom:** Server program **ROUTER** reports it received messages from (or for) unrecognized servers.

**Solution:**

Check that the **server ID** 's have been entered correctly at both ends of the link.

**Symptom:** Server program **QUEJEMAN** times out messages sent to remote servers, or link status is regularly



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**'Watchdog failed link'****Solution:**

Increase the **Link delay** setting.

**Symptom:** Email link regularly goes to 'Watchdog failed link' at certain times (e.g. overnight)

**Solution:**

Check that the server's email connection is not turned off for parts of the day - some companies may set their email system to dial up the Internet at intervals during the day and not at all at night.

**Symptom:** No traffic over the link:

**Solution:**

Check that the link is 'Online' by looking at the Zetafax Server window. Check that both sending and receiving is allowed on the link, using the **General** tab of the **Edit link** dialog. Check that some routing rules have been configured, and use the **Rule filter** to test the rules.

**Symptom:** Rules don't behave as expected:

**Solution:**

Use the **Rule filter** to test the rules.

**Related topics**

[Least Cost Routing dialog](#)

[Least Cost Routing](#)



## Modem Troubleshooting

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This help file is designed to address some of the most common problems people face when using a modem:

### My modem is not hanging up after making a call.

Edit the following file using NOTEPAD: zfax\SYSTEM\Z-DB\SETUP.INI

- Scroll down the file until you find the FCLASS paragraph for your modem, e.g. [FCLASS-1].
- Locate the line following line:  
CheckInit1:

- Modify this line so that it looks like this:  
CheckInit1: ATH

**NOTE:** that there should be a space after the colon ': '.

### Zetafax is reporting the error 'No suitable device for addressee' when I try sending a fax.

This means that Zetafax is not able to locate a device that can be used for sending. If you have not configured a modem for use with Zetafax you should do so. If you have setup a modem using the Zetafax configuration program the above message will be reported if the modem has been configured for receive only. To allow sending from a device that has been setup within Zetafax perform the following tasks:

- Run the Zetafax configuration program
- Select the option 'Configure devices'
- Select your modem and click on the EDIT button
- Deselect the option 'Use for incoming calls only'
- Click on OK then choose QUIT from the configuration menu
- Restart the Zetafax Server

### Sending to or receiving from certain people always seems to fail. Why?

If you are experiencing difficulties with sending / receiving check if this is happening with all devices sent to or receiving from.

If you can successfully send to other devices it is most likely that there is an incompatibility between your fax modem and the other fax device.

Try the following:

- Check on the Equisys web site ([www.equisys.com](http://www.equisys.com)) that you have the latest version of the Zetafax FCLASS driver
- If using Zetafax 6 or later, use the Zetafax configuration program to change the modem settings to enable Class 1 operation this helps with many compatibility issues
- Check with the modem manufacturer that you have the latest version of the modem firmware.

### I have got an internal fax modem, how do I know which fax classes it supports.

Use HyperTerminal in the Accessories | Communications program group. When prompted for a connection name type in test' and click OK. You will then be asked which modem to connect with, choose COM'n', where n' is the com port number used by your modem. Click OK twice.

Type the following in the terminal window:

AT+FCLASS=?

The modem reply will give the class supported, and will be of the form:

0,1,2,2.0

Where 0 is for data, 1 is Class 1 fax, 2 is Class 2 fax and 2.0 is Class 2.0 fax. A reply of ERROR confirms that the modem does not support fax.

**I have tried everything what else can I attempt.**

- Check the phone line is OK by plugging in a normal phone (Analogue). Try dialling the telephone number for that line to check that the line works correctly (is the telephone cable OK? Make sure you are using the phone cable provided by the modem manufacturer).
- If you have another fax modem, try configuring that for use with Zetafax.
- If characters are being dropped or erroneous data received on receiving faxes, try reducing the ReceiveSpeed setting for your modem. This can be done by running the Zetafax Configuration program. From the main menu of the configuration program select 'Configure devices'. Edit your modem settings and click on the 'More' button.
- If you are using an intelligent serial card and/or special COM port drivers, remove them from the system.
- Try attaching the modem to a different PC on the network, and running the fax server from that PC.

**References**

For additional information on Modem issues, please refer to our website: [www.equisys.com](http://www.equisys.com)



## Action commands

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These remaining commands may be used within a document to split it into a number of faxes.

### Send

#### Syntax

%%[Send]

#### Description

Indicates that the document being printed should be split at the foot of this page and submitted as a fax. The remaining page or pages will be treated as a separate fax or faxes.

#### Example

%%[Send]

#### Preview

#### Syntax

%%[Preview]

#### Description

Indicates that the document being printed should be split at the foot of this page and submitted as a fax for preview. The remaining page or pages will be treated as a separate fax or faxes.

#### Example

%%[Preview]



## Add new cover sheet

A cover sheet is, by definition, one sheet only. However, a cover sheet consists of two files; a [background](#) and a [foreground](#) file. This dialog allows cover sheet background and foreground files to be added to the list of installed cover sheets available to Zetafax users when sending faxes. To display this dialog, double-click **cover sheets** in the **cover sheets** folder and click **New** in the **Zetafax - configuration options** dialog.

cover sheets can be created automatically using the Zetafax cover sheet editor, activated by clicking the **New** button.

Alternatively, cover sheets may be created manually, imported, or reinstalled if previously deleted.

The background file contains the fixed part of the cover sheet, like the logo, address etc. of the sending company.

The foreground file contains the variable information. A word processor may be used to manually prepare the background and foreground cover sheet files.

**Note:** The body of the filename for the foreground and background files must be the same. For example, a new cover sheet may comprise a background graphics file named NEWCOVER.G3F and a foreground file named NEWCOVER.EPN. Both files should be stored in the C:\Program Files\Zetafax Server\SYSTEM\ZCOVER directory.

### cover sheet name

The name of the cover sheet, selected from a list of cover sheets that Zetafax has found but which have not yet been installed.

### New...

Creates a new cover sheet, launching the **Zetafax cover sheet Editor**.

### Description

A description of the cover sheet used to aid identification in Zetafax displays. Currently installed cover sheets  
the list of cover sheets already installed.

### Related topics

[cover sheets](#)

[Background file](#)

[Foreground file](#)

[cover sheets, letterheads, and attachment files](#)



## Add new device

---

Lets you enter the details of the new device.

### Description

A description of the device used to aid identification in Zetafax displays.  
The further contents of this dialog depends on the type of the device.



## Add new letterhead

This dialog lets you add [letterhead files](#) to the list of installed letterheads available to Zetafax users when sending faxes, and lets you enter the details of new letterheads. To display this dialog, select the **Letterheads** item in the **Letterheads** folder and click **New** in the **Zetafax - cover sheets and letterheads** dialog.

The letterhead file is a multi-page graphics file that is merged onto a message at send time. Use a word processor to prepare the letterhead file. The file usually has a .G3F extension, and should be stored in the C:\Program Files\Zetafax Server \SYSTEM\Z-LETTER directory.

### Letterhead name

The name of the letterhead, selected from a list of letterheads that Zetafax has found but which have not yet been installed.

### Description

A description of the letterhead used to aid identification in Zetafax displays. Currently installed letterheads the list of letterheads already installed.

### Related topics

[Letterheads](#)

[Letterhead files](#)

[cover sheets, letterheads, and attachment files](#)



## Add new Zetafax email user profile

---

Lets you enter the name of the new email user profile.

An email user profile is created in your email system, and allows you to group users via company, specific task or department. By adding an email user profile to Zetafax, you will enable users of that group to send faxes, and for faxes to be received in a central location.

### Email user profile to add

The name of the email user profile - this should be exactly the same as has been added to the email system.

### Related topics

[Zetafax users](#)

[Email user profiles](#)





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## Add new Zetafax user

---

Lets you enter the name of the new user.

### Description

A Zetafax User is a licensed user of the Zetafax system. Each person that needs to send or receive faxes should be configured as a Zetafax User. The number of Zetafax Users you can configure depends on your licence, contact you distributor or [Equisys](#) direct for further details.

### Zetafax user name to add

The short name used to identify the user to the Zetafax programs. This name needs to be unique, or the system will not be able to determine the correct user to route faxes to.

Once your User name has been selected, press OK and your User will be added.

### Related Topics

[Adding a new Zetafax User group](#)

[Adding a new mail user profile](#)



## Add new Zetafax user group

---

Lets you enter the name of the new group.

### Description

Zetafax allows you to group your Zetafax users into groups, this enables you to manage users with similar needs and requirements.

### Zetafax user group name to add

The name used to identify the group. This may not be the name of an existing group. It must start with the '@' character.

### Currently configured user groups

The names of the existing groups.

### Related topics

[Zetafax user group details](#)

[Zetafax groups](#)

[Zetafax users](#)



## Advanced options

---

Lets you edit more details of the device.

The contents of this dialog depends on the type of the device.

To display this dialog, click the **More...** button in the **Device options - Fax modem** dialog.

### Action if transmission interrupted

Specify the redial and resending actions that are to be taken when a fax transmission has been interrupted.

#### Redial immediately

Check this box to specify that the device controller should attempt to dial the fax number twice if it fails whilst sending a page (rather than while dialing or connecting to the remote fax). If the device detects an error during or at the end of the page it will hang up and redial immediately. Leave this box unchecked to disable immediate redial - for example if your modem gets repeated problems when sending to certain fax machines, or if required for large faxshots.

See [Expert setup options](#) to specify that the device controller should redial more than once, and for details on resetting the retry counter to assist in sending long faxes.

#### Resend all pages

Select this option to resend the entire fax message, if a fax transmission is interrupted part way through sending.

#### Continue from last page sent

Select this option to continue sending the fax message from the last page that was successfully sent, if a fax transmission is interrupted part way through sending.

#### Resend first page then continue

Select this option to resend the first page (cover sheet) and then continue sending the fax message from the last page that was successfully sent, if a fax transmission is interrupted part way through sending.

### Speaker

Specifies whether the modem's internal speaker is to be enabled (if present) for outgoing calls. This setting is useful if problems are experienced with dialing when initially setting up the system.

#### On when connecting

Enable the speaker until the remote fax answers, or the few seconds of initial setup conversation has completed (depending on the modem).

#### On throughout call

Enable the speaker throughout the call.

#### Off

The speaker is switched off at all times.

### Volume

Specifies the volume setting for the modem's internal speaker (if supported by the modem). This parameter is ignored if the speaker is disabled (see the Speaker: parameter).

### Maximum baud rates

Specify the modem's send and receive baud rates, and the command baud rate.

### Sending faxes

Select the maximum line speed for sending faxes (if supported by the modem). The value is usually 9600 or 14400 (depending on the type of modem). If you are unsure, select (default). Zetafax will automatically switch down to a slower speed if required by the line quality or the remote fax machine.

### Receiving faxes

Select the maximum line speed for receiving faxes (if supported by the modem). The value is usually 9600 or 14400 (depending on the type of modem). If you are unsure, select (default). Zetafax will automatically switch down to a slower speed if required by the line quality or the remote fax machine. This parameter should be reduced if you experience data errors on incoming faxes (for example on a lower powered fax server PC).

### Command mode

Specifies the baud rate used between PC and modem when setting up a fax call - while sending the fax the baud rate is always 19200. If the fax modem supports 19200 bps in command mode then it is preferable to set this parameter to 19200. This can be checked using the Windows Terminal program. Some device types ignore this parameter.

### Fax protocol

Fax modems may operate in two different modes Class 1 or Class 2. In Class 2 the modem is responsible for controlling fax protocol, but in Class 1 Zetafax controls fax protocol. Use Class 1 (if available)

Check this box to use the modem in Class 1, allowing Zetafax to control the fax protocol. This may improve the performance of some modems.

### Flow control

Data flow between Zetafax and the modem may be controlled by software or hardware. Software flow control must be supported by all fax modems, and is used by default. Some COM port expansion systems only support hardware flow control.

### Use hardware flow control

Check this box to use hardware flow control. This is necessary for some COM port expansion systems, and may cure problems where blocks of the page data are missing from sent faxes.

### OK

Store the new advanced device configuration, and return to the [Device options](#) dialog. Cancel

Cancel the request to edit the advanced device configuration, and return to the Device options - Fax modem dialog.

### Related topics

[Configuring devices](#)

[Device Configuration Wizard](#)

[Expert setup options](#)

[Device options](#)

[Using Zetafax with Brooktrout fax boards](#)

[Using Zetafax with the HP Digital Sender](#)



## Advanced Printer Settings

---

These options enable you to configure how faxes containing legal pages or other longer page sizes are printed. Select from one of the four options below.

### Use main printer, printing on 2 pages

Choose this option if you want larger pages to be split and printed on two pages of the main printer (as chosen in the [Select Printer](#) options).

### Use main printer to fit on one page

Choose this option if you want larger pages to be compressed to fit on one page of the main printer.

### Reduce width to keep aspect ratio

Choose this option to maintain the aspect ratio of the fax when compressing the image to fit on the smaller paper size.

### Use main printer but print larger pages from a different tray

Choose this option if you want larger pages to be printed from a different tray of the main printer.

### Paper size

The drop-down list displays the available paper sizes for the selected printer. Choose a specific paper size to be used for printing the faxes on.

### Paper source

The drop-down list displays the available paper sources for the selected printer. Choose a specific paper source to be used for printing the faxes on.

### Use following printer and settings for all pages

Choose this option if you want larger pages to be printed from a different printer.

### Printer to use

Use the drop-down list to select the printer that Zetafax will use for all larger paper sizes.

### Paper size

The drop-down list displays the available paper sizes for the selected printer. Choose either the default paper size or choose a specific paper size to be used for printing.

### Paper source

The drop-down list displays the available paper sources for the selected printer. Choose either the default paper source or choose a specific paper source to be used for printing.

### Related topics

[Automatic printing](#)

[Automatic printing of received faxes](#)

[Automatic printing of sent faxes](#)

[Select printer](#)



## Archiving of messages received or sent

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Provides configuration options for the archiving of incoming and outgoing messages.

- To display this dialog, double-click **Archiving of messages received or sent** in **Server settings** or select the **Archiving** icon from the **Zetafax - configuration options** dialog.

### Archive received messages

Specifies whether faxes that are received are to be archived to the specified directory. Check this box to store the message history file (which gives details of the sender).

**Note:** The 'Server Logs' function on the Zetafax Client that displays a list of all faxes sent and received is independent from archiving, and will work correctly even with archiving disabled.

### Save fax images with transmission reports (for faxes received)

Check this box to store the contents of the fax (as a graphics file), in addition to the message history file (giving details of the sender).

**Note:** Archiving of graphics files can use considerable disk space.

### Directory to store files (for faxes received)

Specifies the directory name to use for archiving received faxes. The files are stored in subdirectories of this directory, with names of the form yymmdd (where yymmdd is the date the fax was received). This is only used if archiving of received messages is enabled.

### Archive sent messages

Specifies whether faxes that are sent are to be archived to a specified directory. Check this box to store the message history file (which gives details of the sender).

**Note:** The 'Server Logs' function on the Zetafax Client that displays a list of all faxes sent and received is independent from archiving, and will work correctly even with archiving disabled. Save fax images with transmission reports (for faxes sent)

Check this box to store the contents of the fax (as a graphics file), in addition to the message history file (giving details of the sender).

**Note:** Archiving of graphics files can use considerable disk space. Directory to store files (for faxes sent)

Specifies the directory name to use for archiving sent faxes. The files are stored in subdirectories of this directory, with names of the form yymmdd (where yymmdd is the date the fax was completed). This is only used if archiving of sent messages is enabled.

### OK

Save any changes that have been made to the archiving options, and exit the [Zetafax - configuration options](#) dialog.

### Cancel

Do not save changes made to the archiving options, and exit the [Zetafax - configuration options](#) dialog.

### Reset

Reset the archiving options displayed, to their default settings. The settings are not saved until either **OK** is clicked or another category icon is selected from the scroll (left).

---

If you use the scrolling icons on the left to move to another **Category** , any changes made to the archiving options are saved.

**Related topics**

[Archiving](#)

[Server settings](#)



## Automatic printing of received faxes

---

Provides configuration options for the automatic printing of incoming messages. This dialog allows the server default automatic printing options to be modified. These settings can be overwritten for individual users in the **User options - Printing** dialog.

To display this dialog, double-click **Automatic printing of received faxes** in **Server settings** , or select the **Print - Recd** icon from the **Zetafax - configuration options** dialog.

### Printer to use

Shows the main printer to use for printing received faxes which have been queued for automatic printing.

### Select

Clicking this button calls the Select printers dialog which selects the printers to use for the automatic printing of received faxes.

### Print fax message

Specifies whether faxes that are received are to be printed automatically.

### Print status report

Check this box to print a status page, giving details of the sender. If the Print fax message is not selected the first page of the fax will be included within the status report.

### Pages on each printed sheet

Specifies how many pages of a received fax are to be printed on sheet. The user can choose between 1, 2 or 4.

### Print header line on fax message

Specifies whether header information should be added to the printed fax messages. This setting has no effect if printing a status report as well as the fax message.

### Delete fax after spooling for printing

Check this box to delete faxes after a received fax has been printed.

### Border

Check this box to add a border to the pages printed.

### Shadow

Check this box to add shadow to the pages printed.

### OK

Save any changes that have been made to the printing options, and exit the Zetafax - configuration options dialog.

### Cancel

Do not save changes made to the printing options, and exit the Zetafax - configuration options dialog.

### Reset

Reset the printing options displayed, to their default settings. The settings are not saved until either **OK** is clicked or another category icon is selected from the scroll (left).

If you use the scrolling icons on the left to move to another **Category** , any changes made to the printing options are saved.

### Related topics

[Automatic printing](#)

[Advanced Printer Settings](#)



---

[Automatic printing of sent faxes](#)

[Select printer](#)

[User edit - printing](#)

[Server settings](#)



## Automatic printing of sent faxes

---

Provides configuration options for the automatic printing of outgoing messages. These settings can be overwritten for individual users in the **User options - Printing** dialog.

To display this dialog, double-click **Automatic printing of sent faxes** in **Server settings**, or select the **Print - Sent** icon from the **Zetafax - configuration options** dialog.

### Printer to use

Shows the main printer to use for printing sent faxes that have been queued for automatic printing.

### Select

Clicking this button calls the Select printers dialog which selects the printers to use for the automatic printing of sent faxes.

### Print sent fax message

Specifies whether faxes that are sent are to be printed automatically.

### Print status report

Check this box to print a status page, giving details of the sender. If the Print fax message is not selected the first page of the fax will be included within the status report.

### Print failed fax message

Specifies whether faxes that have failed are to be printed automatically.

### Print header line on fax message

Specifies whether header information should be added to the printed fax messages. This setting has no effect if printing a status report as well as the fax message.

### Pages on each printed sheet

Specifies how many pages of a sent fax are to be printed on sheet. The user can choose between 1, 2 or 4.

### Border

Check this box to add a border to the pages printed.

### Shadow

Check this box to add shadow to the pages printed.

### OK

Save any changes that have been made to the printing options, and exit the Zetafax - configuration options dialog.

### Cancel

Do not save changes made to the printing options, and exit the Zetafax - configuration options dialog.

### Reset

Reset the printing options displayed, to their default settings. The settings are not saved until either **OK** is clicked or another category icon is selected from the scroll (left).

If you use the scrolling icons on the left to move to another **Category**, any changes made to the printing options are saved.

### Related topics

[Automatic printing](#)

[Advanced Printer Settings](#)

[Automatic printing of received faxes](#)

[Select printer](#)  
[User edit - printing](#)  
[Server settings](#)



## Cover sheet background file

---

The background file contains the fixed part of the cover sheet, like the logo, address etc. of the sending company.

It is stored in TIFF FAX format, with a version for fine (with extension .G3F) mode faxing and optionally a version for normal (with extension .G3N) mode faxing. cover sheet files are stored in the C:\Program Files\Zetafax Server\SYSTEM\ZCOVER directory.

Use a word processor to prepare your cover sheet background. Then set up the Zetafax printer driver in High resolution mode, and print the background. On the addressing dialog click the Save as... button and save the .G3F file in the C:\Program Files\Zetafax Server\SYSTEM\ZCOVER directory.

Since only the first page of the cover sheet background file is used, if you require a cover sheet with your letterhead as the background, then you can use the same file for both (any continuation pages will be ignored). If you want the background of the cover sheet to be the same as your letterhead, then use the Windows File Manager program to copy the letterhead file from e.g. C:\Program Files\Zetafax Server\SYSTEM\ZLETTER\LETTHEAD.G3F to C:\Program Files\Zetafax Server\SYSTEM\ZCOVER\COVSHEET.G3F.



## Configure associations

---

This dialog allows you to choose the types of files that will be associated with an application program that performs rendering.

### Configuration of:

This displays the name of the application program that you are going to associate with one or more file extensions.

### Associations list: Standard

This list contains the standard file extensions that are associated with the application (for example, extensions of type DOC are associated with Word).

### Associations list: Customized

This list shows the list of non-standard file extensions that are currently associated with the application. If you wish to add an association, you should add the file extension in the input field at the top of this list.

### Add

This adds the file extension you have entered to the customized list of associations.

### Delete

This removes the association for the file extension that is currently highlighted.

### Related topics

[Email Gateway](#)

[Email Gateway enabled](#)

[Setting up Email Gateway user](#)



## Configuring dialing properties

---

[Example: Atlanta, USA](#)

[Example: London, UK](#)

### Use standard TAPI dialing properties

Select this option to use the standard Windows dialing properties. These settings can be adjusted from the Telephony control panel.

If this option is selected then some of the Zetafax dialing properties do not need to be set. The **Test numbers** will still work, and should be used to check that the settings behave as intended.

### Use Zetafax dialing properties

Select this option to set up dialing properties using the controls in this dialog. In some cases, particularly for versions of Windows earlier than Window '98, TAPI settings may not be sufficient to give reliable results, so Zetafax settings may be preferable.

Check the settings using the **Test numbers**.

### Server is in this country

Select the country where your server is located from the list.

### Area code

Enter your area code. If you normally include the **National access code** with area codes include it here (e.g. European area codes such as London 0171 are usually quoted with the national access '0').

### Area rules

This button starts the [Area rules](#) dialog to configure special treatment for specific area codes.

### National access code

Enter the prefix used when dialing a National area code. Zetafax will provide a default setting according to the country selected (e.g. '1' for USA, '0' for European countries). This default may be restored by clicking the **Restore defaults** button.

### International access code

Enter the prefix used when dialing an international number. Zetafax will provide a default based on the country selection (e.g. '011' for USA, '00' for European countries).

### Restore defaults

Clicking this button restores the default values for **National** and **International access codes**.

### Numbers of more than .. digits contain an area code

Select this option if numbers entered by users will contain area codes without the **National access code** (e.g. USA). Zetafax will determine whether a number includes an area code or not by looking at the length of the number. If the number is longer than the value entered here, Zetafax will assume that the area code is included.

### Numbers with area codes always begin with the national access code

Select this option if area codes always include the National access code. Numbers of any length without the National access are assumed to be local numbers.

### Always dial area code (10-digit dialing)

Check this box if the area code must be dialed for local numbers.

### Include the national access code

Check this box if the local area code should be dialed with the National access.

### Number to test

Select a number from the list to test. The list of numbers should test all cases, but any number can also be entered by hand.

The Canonical format and dial-able number conversions for the test number are displayed so that the settings can be checked.

### OK

Save the settings and exit the dialog.

### Cancel

Discard all changes to the settings and exit the dialog.

### Related topics

[Configuring Least Cost Routing](#)

[Dialing properties](#)

[Edit area](#)

[Least Cost Routing](#)

[Enabling LCR](#)

[Telephone dialing properties](#)



## Configuring LCR for more than one site

---

Routing strategy across a network can be controlled centrally with Zetafax.

While configuring local servers for LCR and setting up links to other servers on the network require information specific to each server and must be done locally, fax destinations and routing rules may be defined by a head office, and distributed to all of the servers on the network.

This requires that the rules and destinations must function appropriately for *all* of the LCR servers. One way to achieve this might be to imagine an extra server on the network that has links to all the others, and develop rules and location definitions for sending faxes from that server.

### Destinations

Work through the servers on the network, and define all the necessary areas and regions that will be required to produce efficient rules to and from them all. This may require the definition of areas in a number of countries.

### Routing rules 'Use local server' versus <local server ID>

When adding servers to rules, you may have noticed that the ID of your local server appears in the list of all the servers to which you have configured links. This is for use when rules are exported to other servers, but the distinction between this and the **Use local server** option below the list is very important.

The **Use local server** option always refers to the local server, regardless of where the rules are installed. You may want to use this for rules such as 'Send all urgent faxes directly from the local server'.

Choosing your local server from the list of remote servers will have a different effect depending on where the rules are installed. If you were configuring rules on a server in Chicago to 'Send all faxes to North America via the Chicago server' you would select your local server (Chicago) from the list of remote servers. Now when the same rule is used in Paris for example, faxes for North America will still be routed via Chicago.

### Distributing the settings

Once the setup procedure is complete, Zetafax will have created a number of files containing all of your definitions.

The files: REGION.INI, COUNTRY.INI, AREAXXX.INI, (several) LCRRULES.INI may be found in ..\Program Files\Zetafax Server\SYSTEM\Z-DB\. All of these may be copied directly into the same directory on servers across the network.

### Related topics

[Least Cost Routing dialog](#)

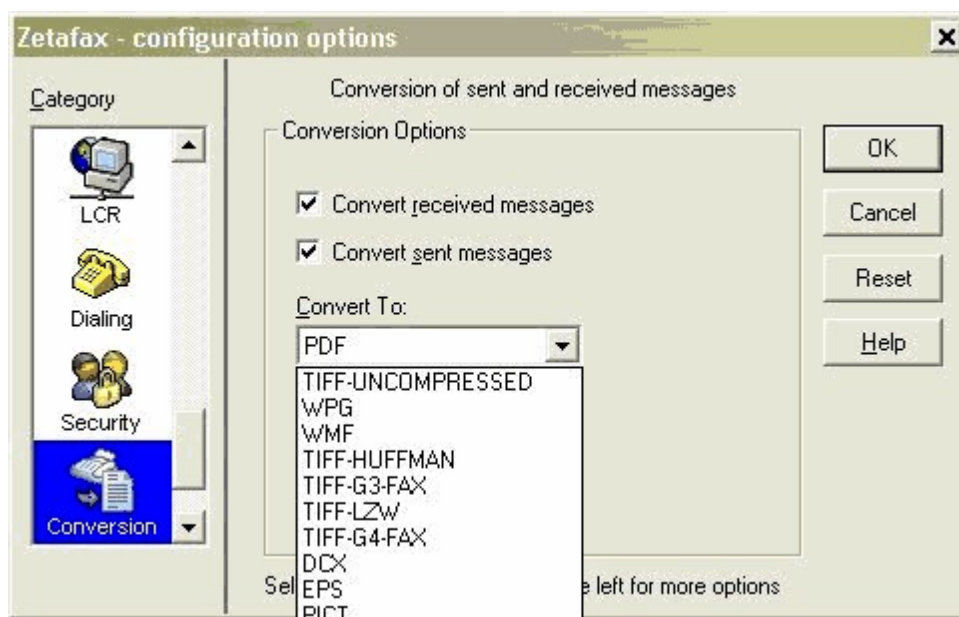
[Least Cost Routing](#)





## Conversion of sent and received messages

With the CommsEngine addon enabled, Zetafax contains the ability to automatically convert incoming and outgoing messages into a number of formats. Should this option be enabled, a copy of each message will be stored in the same location as the original message but in the specified format:



### Convert received messages

When this box is ticked, all received messages are converted to the specified format.

### Convert sent messages

When this box is ticked, all sent messages are converted to the specified format.

### Convert To:

Gives the file format that messages will be converted to.



## Cover sheets

---

Contains cover sheets for use in outgoing messages, installed in the **Zetafax Configuration** program to aid editing and management.

While this folder is selected in the left pane, the **Action** and **Right-click** menus provide commands that work on this folder.

The right pane shows the cover sheets within this folder, with the following columns of information:

### Description of the cover sheet

A description of the cover sheet used to aid identification in Zetafax displays.

### cover sheet

The name of the cover sheet, used to select it in Zetafax displays.

While a cover sheet is selected in the right pane, the **Action** and **Right-click** menus provide commands that work on this cover sheet.

### Exporting the cover sheets list

On the **Action** menu, or when you right-click, use the **Export list...** command to export the list of installed cover sheets to a tab delimited text file or a comma delimited CSV file. The exported list includes a name and description for each cover sheet.

### Related topics

[Add new cover sheet](#)

[cover sheets, letterheads, and attachment files](#)



## Data Protection

This dialog displays the data protection statement. To display this dialog, click **Next>** in the [License user details](#) dialog.

Please enter your preferences for how we may use the personal information that you have supplied. Click **Next>** to display the [License registration details](#).



## DDE commands

Applications such as word processors may communicate with the Zetafax client program directly using DDE commands. Provided adequate details have first been given using the DDE commands, when a document is "printed" using the Zetafax Windows printer driver no dialogs will be displayed and the fax or faxes will be submitted to the Zetafax server automatically.

### DDE conversation

Before issuing any addressing commands, a DDE conversation must be established between the application and the Zetafax client program. The name of the DDE server is Zetafax, and the topic for the purposes of addressing faxes is Addressing.

The Zetafax client program should be put under the control of DDE by issuing a DDEControl DDE Execute call.

Addressing commands can then be issued using DDE Poke calls. Details of the commands which may be used are given below.

A message file should be created by printing using the Zetafax Windows printer driver. Alternatively an ASCII file, or a suitable Epson or TIFF file, may be copied to the spool file location used by the Zetafax client program (usually C:\WINDOWS\ZETAFOX.SPL, set by the LogArea: entry in the ZETAFOX.INI file).

The message can be submitted to the Zetafax server for sending with a Send DDE Execute call, or for preview with a Preview DDE Execute call.

Further messages can be submitted by specifying a new addressee, organization, and fax number, creating a new message file, and then issuing a Send or Preview DDE Execute call.

**Note:** Each of the addressing settings, such as the choice of letterhead, will remain unchanged between messages until the appropriate DDE Poke call is made to alter it. If these settings need to be reset to their default values between messages, the Zetafax client program should be released from DDE control with a DDERelease DDE Execute call and then put back under DDE control with a DDEControl DDE Execute call.

After submitting the message or messages the Zetafax client program should be released from the control of DDE by issuing a DDERelease DDE Execute call.

The DDE conversation should finally be terminated properly.

### Commands

The following WM\_DDE\_EXECUTE commands may be issued using the Addressing topic:

Command	Description
DDEControl	Puts the Zetafax client program under DDE control for addressing.
Send	Submits a message to the Zetafax server for sending.
Preview	Submits a message to the Zetafax server for preview.
DDERelease	Releases the Zetafax client from DDE control.

### Poke items

The following table lists the items that may be poked (WM\_DDE\_POKE) using the Addressing topic whilst the Zetafax client program is under DDE control on all Zetafax configurations:

---

Item	Parameters
To	fax, recipientname, organization
Fax	fax
Name	recipientname
Organization	organization

For a description of each command and its parameters see the API help files.

With an API license the following additional items may be poked:

Item	Parameters
From	sendername
cover sheet	cover sheet
Letterhead	letterhead
Quality	quality
Priority	priority
After	time
Time	time
Header	header
Attach	files
Charge	charge code

For a full description of each command and its parameters, see the API help file.

**Related topic**

[Example DDE macros](#)



## Example DDE macros

### Windows 95/98

The following Microsoft Word macro demonstrates the use of DDE commands to submit the current document to the Zetafax server for sending by fax:

```
Sub MAIN
    REM Set up DDE control of Zetafax
        Conv1 = DDEInitiate("Zetafax", "Addressing")
        DDEExecute(Conv1, "[DDEControl]")
    REM Set the addressing options
        DDEPoke(Conv1, "To", "123 456 7890, Sam Smith, Smith and Sons")
    REM Set Zetafax to the default printer and print the document
        FilePrintSetup .Printer = "Zetafax printer on ZETAFAFAX.SPL"
        FilePrint
    REM Submit the fax and release DDE control
        DDEExecute(Conv1, "[Send][DDERelease]")
        DDETerminate(Conv1)
End Sub Background printing
```

Please note that this macro disables the background printing feature when printing to the Zetafax printer from within a Microsoft Word macro. This is done by adding the following line:

```
ToolsOptionsPrint .Background = 0
```

You can also re-activate background printing by adding the following line to the end of your macro:

```
ToolsOptionsPrint .Background = 1 Windows NT
```

Because Windows NT uses a different naming convention for its printer ports it is necessary to adjust the macro shown above to accommodate for this. The simplest way to do this is to record a new macro where you select your Zetafax printer. In the example above, you need to change the FilePrintSetup call to specify the spool file path which would look something like: e.g.

```
FilePrintSetup .Printer = "Zetafax printer on NE00:"
```

This is best done by recording a simple macro within Word of you selecting the Zetafax printer and copying the resulting

Word Basic code to your Zetafax DDE macro.

Here is an example Word for Windows macro which submits the current document to the fax server for sending by fax under Windows NT:

```
Sub MAIN
    REM Set up DDE control of Zetafax
        Conv1 = DDEInitiate("Zetafax", "Addressing")
        DDEExecute(Conv1, "[DDEControl]")
    REM Set Zetafax to the default printer and print the document
        FilePrintSetup .Printer = "Zetafax printer on NE00:"
    REM Disable background printing
        ToolsOptionsPrint .Background = 0
        FilePrint
End Sub
```

```
REM Set the addressing options
    DDEPoke(Conv1, "To", "123 456 7890, Sam Smith, Smith & Sons")
    DDEPoke(Conv1, "Quality", "High")
    DDEPoke(Conv1, "Time", "19:00:00")
    DDEPoke(Conv1, "Attach", "infopack")
REM Submit the fax and release DDE control
    DDEExecute(Conv1, "[Send][DDERelease]")
    DDETerminate(Conv1)
End Sub Microsoft Excel
```

In Microsoft Excel, the DDEPoke instructions do not support a constant string as data. It must be a range address. So, instead of using the line:

```
DDEPoke Conv1, "From", "John Doe"
```

The instruction should appear as:

```
DDEPoke Conv1, "From", Worksheets("Sheet1").Range("A1")
```

Here is an example Excel macro that will submit the current document to the fax server using addressing information contained in fields within an active worksheet.

```
Sub Macro1()
    ZetaTalk = DDEInitiate( _ app:="Zetafax", _ topic:="Addressing")
    Application.ActivePrinter = "Zetafax printer on NE00:"
    ActiveSheet.PrintOut
    DDEExecute ZetaTalk, "[DDEControl]"
    Set RecipientName = Worksheets("Sheet1").Range("A1")
    Set OrgName = Worksheets("Sheet1").Range("B1")
    Set FaxNumber = Worksheets("Sheet1").Range("C1")
    Application.DDEPoke ZetaTalk, "Name", RecipientName
    Application.DDEPoke ZetaTalk, "Organisation", OrgName
    Application.DDEPoke ZetaTalk, "Fax", FaxNumber

    Rem Submit the fax and release DDE control
    DDEExecute ZetaTalk, "[Send][DDERelease]"
    DDETerminate ZetaTalk
End Sub
```



## Expert setup options

---

Zetafax has a large number of setup options designed for use by advanced users and experts.

The SETUP.INI file is used to configure the Zetafax system, and is stored in the C:\Program Files\Zetafax Server\SYSTEM\ZDB directory. The settings that it contains are read by the server on startup, and also by the Zetafax Client program when it is run. The Zetafax SETUP program alters settings in this file (as well as other files) and we advise the use of the SETUP program wherever possible.

Expert users can find documentation on SETUP.INI in the SETUP.WRI (Windows WRITE format) file in the C:\Program Files\Zetafax Server\SYSTEM\ZDB directory.

Ensure that you backup your Zetafax files before editing SETUP.INI by hand.





## Device Configuration Wizard - Finish

---

You have now completed the configuration of Zetafax devices. For the changes to take effect, you need to restart the Zetafax Server.

### Back

Click **Back** to review or update previous information entered in the wizard.

### Finish

Click **Finish** to complete the configuration of devices.

### Cancel

Click **Cancel** to exit the wizard without making any changes to the Zetafax device configuration settings.

### Related topics

[Devices](#)

[Configuring devices](#)

[Device Configuration Wizard](#)

[Automatic printing](#)

[Using Zetafax with the HP Digital Sender](#)

[Using Zetafax with intelligent fax boards](#)

[Hardware requirements](#)



## Device Configuration Wizard - Found Devices

---

### Available modems

Listed at the top of the screen are all the devices that have been found and that can be configured with Zetafax.

### Add

Select a device from the list of found devices and click **Add** to configure the device.

### Configured devices

All devices that have been configured to be used with Zetafax are listed here.

### Remove

Click **Remove** to delete a configured Zetafax device.

### Edit

Click **Edit** the settings for a configured Zetafax device.

### Back

Click to return to the previous screen in the wizard.

### Next

Click to complete the device configuration. The [Device Configuration Wizard - Finish](#) dialog is displayed.

### Cancel

Click to exit the wizard without making any changes to the Zetafax device configuration settings.

### Related topics

[Devices](#)

[Configuring devices](#)

[Device Configuration Wizard](#)

[Automatic printing](#)

[Using Zetafax with the HP Digital Sender](#)

[Using Zetafax with intelligent fax boards](#)

[Hardware requirements](#)



## Device Configuration Wizard - Introduction

The **Device Configuration Wizard** will take you through the steps necessary to configure your fax modems, intelligent fax boards, active ISDN controllers or printers. This step is optional during the installation and can be completed at a later time, although you will be unable to send or receive a fax without configuring a device.

### Configure a device now?

Choose this option and click **Next** to proceed through the [wizard](#).

### Configure a device later?

Choose this option to defer configuration until later. Click **Next** to exit the wizard. Please run the **Zetafax Configuration** program to configure a device later.

### Cancel

Click **Cancel** to exit the wizard without making any changes to the Zetafax device configuration settings.

### Related topics

[Devices](#)

[Configuring devices](#)

[Device Configuration Wizard](#)

[Automatic printing](#)

[Using Zetafax with the HP Digital Sender](#)

[Using Zetafax with intelligent fax boards](#)

[Hardware requirements](#)



## Device Configuration Wizard - Other Device Types

---

Available device types

The **Device Type** list at the top of the screen displays the different device categories that can be configured with Zetafax.

### Add

Click **Add** to configure the device selected in the **Device Type** list.

### Configured devices

All devices that have been configured to be used with Zetafax are listed here.

### Remove

Click **Remove** to delete a configured Zetafax device.

### Edit

Click **Edit** to change the settings for a configured Zetafax device.

### Back

Click this button to return to the previous screen in the wizard.

### Next

Click to complete the device configuration. The [Device Configuration Wizard - Finish](#) dialog is displayed.

### Cancel

Click to exit the wizard without making any changes to the Zetafax device configuration settings.

### Related topics

[Devices](#)

[Configuring devices](#)

[Device Configuration Wizard](#)

[Automatic printing](#)

[Using Zetafax with the HP Digital Sender](#)

[Using Zetafax with intelligent fax boards](#)

[Hardware requirements](#)



## Device Configuration Wizard - Printer Settings

This screen allows configuration of the devices for printers that enable automatic printing of incoming and outgoing faxes. To configure automatic printing, see [Automatic printing of sent faxes](#) and [Automatic printing of received faxes](#).

### Device

Displays the device name.

### Description

Specify a text description for the device. The description is displayed in the device window of the Zetafax server application.

### Back

Click this button to return to the previous screen in the wizard.

### OK

Click to add this device. You can then configure further devices or complete the **Device Configuration Wizard**.

### Related topics

[Devices](#)

[Configuring devices](#)

[Device Configuration Wizard](#)

[Automatic printing](#)

[Using Zetafax with the HP Digital Sender](#)

[Using Zetafax with intelligent fax boards](#)

[Hardware requirements](#)



## Device Configuration Wizard - SMS Settings

---

This screen allows the configuration of GSM modems for Text Messaging (SMS).

### Device

Displays the Zetafax device name.

### Description

Specify a text description for the device. The description is displayed in the device window of the Zetafax Server application.

### Connected on port

From the drop down list, select the communications (COM) port that the device is connected to, or type the port name if it is not listed. The **Device Configuration Wizard** will complete this field if the device was successfully found.

### Sending

This shows device options for outgoing faxes.

### Service center number

Enter the phone number of the Service center used for text messaging.

### Port options

This shows device options for the communications port.

### Keep port closed

Select to ensure that the port is closed between calls.

### More

Click **More** to see a full list of settings for this device. The [Device Options](#) dialog is displayed.

### Reset

Click **Reset** to reset the device's details to the default settings.

### Back

Click this button to return to the previous screen in the wizard.

### OK

Click to add this device. You can then configure further devices or complete the **Device Configuration Wizard**.

### Cancel

Click to exit the wizard without making any changes to the Zetafax device configuration settings.

### Related topics

[Devices](#)[Configuring devices](#)[Device Configuration Wizard](#)[Automatic printing](#)[Using Zetafax with the HP Digital Sender](#)[Using Zetafax with intelligent fax boards](#)[Hardware requirements](#)



## Device Configuration Wizard - Settings

---

The wizard now requires you to enter any specific settings for this device.

### Device

Displays the Zetafax device name.

### Connected on port

From the drop down list, select the communications (COM) port that the device is connected to, or type the port name if it is not listed. The **Device Configuration Wizard** will complete this field if the device was successfully found.

### Description

Specify a text description for the device. The description is displayed in the device window of the Zetafax Server application.

### Sending

This contains device options for outgoing faxes.

#### Dial prefix for external calls

Specifies the characters to add to the start of any number that is dialed. This is typically the number to obtain an outside line (if the modem is connected to an internal extension). The user can disable this from the **Zetafax Client** by specifying a fax number that starts with an "x".

#### Organization name on header line

The name to put on the header line of each fax page (if the header line is enabled for the message in the **Zetafax Client**). This name also forms the CSID (called station identifier), which is sent to the remote fax machine at the start of an outgoing or incoming call for it to display or print in its reports.

### Receiving

This contains device options for incoming faxes.

#### User to receive incoming faxes

Specify the user or user group who is to receive incoming messages from this device. This user can pass messages across to other Zetafax users. Select **(disabled)** to prevent the modem being used for incoming messages.

#### Use for incoming calls only

Check this box to reserve this device for incoming calls. The device will not be used to send faxes.

### All settings

Click **All Settings** to see a full list of settings for this device. The [Device Options](#) dialog is displayed.

### Reset

Click **Reset** to reset the device's details to the default settings.



**Back**

Click this button to return to the previous screen in the wizard.

**OK**

Click to add this device. You can then configure further devices or complete the **Device Configuration Wizard** .

**Cancel**

Click to exit the wizard without making any changes to the Zetafax device configuration settings.

**Related topics**

[Devices](#)

[Configuring devices](#)

[Device Configuration Wizard](#)

[Automatic printing](#)

[Using Zetafax with the HP Digital Sender](#)

[Using Zetafax with intelligent fax boards](#)

[Hardware requirements](#)



## Device Configuration Wizard - Special Devices

---

This screen lists devices that have been identified as requiring special settings for them to work with Zetafax. If your device is not in the list, please select **(Not in list)** and proceed to the next stage in the wizard.

### Back

Click this button to return to the previous screen in the wizard.

### Next

Click to complete the device configuration. The [Device Configuration Wizard - Settings](#) dialog is displayed.

### Cancel

Click to exit the wizard without making any changes to the Zetafax device configuration settings.

### Related topics

[Devices](#)

[Configuring devices](#)

[Device Configuration Wizard](#)

[Automatic printing](#)

[Using Zetafax with the HP Digital Sender](#)

[Using Zetafax with intelligent fax boards](#)

[Hardware requirements](#)



## Device options

Lets you edit the details of an existing device. To display this dialog, click **All Settings** in the **Device Configuration Wizard - Settings** dialog.

The contents of this dialog depends on the type of the device.

### Device

Displays the Zetafax device name.

### Description

Specify a text description for the device. The description is displayed in the device window of the Zetafax server application.

### Connected on port

Select the communications (COM) port, that the device is connected to, from the drop down list or type the port name if it is not listed.

### Sending

Device options for outgoing faxes.

### Dial prefix for external calls (e.g. "9,")

Specifies the characters to add to the start of any number that is dialed. This is typically the number to obtain an outside line (if the modem is connected to an internal extension). The user can disable this by specifying a fax number that starts with an "x".

### Fax number on header line

Specifies the number to put on the header line of each fax page (if enabled for this message). This is normally the fax number the recipient should reply to (not necessarily the number the fax modem is on). This number also forms the CSID (called station identifier) which is sent to the remote fax machine at the start of an outgoing or incoming call for it to display or print in its reports.

### Use DTMF tone dialing

Specifies whether the modem should use tone or pulse dialing. Tone dialing is quicker if the phone line being used supports it.

### Detect busy (engaged) tone

Check this box to enable busy (engaged) tone detection, if supported by the modem. If the modem reports a number as busy to the device controller, the error code (as displayed on the Zetafax Client) is set to "phone number engaged".

**Note:** Some modems which support busy tone detection do not differentiate between busy and no answer when reporting an error to the device controller. For those devices Zetafax logs the error as "unable to connect or no answer" (as it would if busy tone detection were disabled); however it is still advantageous to enable the feature to save time when dialing busy numbers.

### Detect dial tone

Check this box to enable dial tone detection, if supported by the modem. If the modem returns the error

"no dial tone" the device controller logs a message to that effect, and sets the error code to "unable to connect or no answer". Certain PABX systems have dial tones that are not recognized by specific modems causing all calls to fail with this message, in which case this box should be left unchecked.

#### Receiving

Device options for incoming faxes.

#### User to receive incoming faxes

Specify the user or user group who is to receive incoming messages from this device. This user can pass messages across to other Zetafax users. Select (disabled) to prevent the modem being used for incoming messages.

#### Use for incoming calls only

Check this box to reserve this device for incoming calls. The device will not be used to send faxes.

#### Reset

Click to reset the device's details to the default settings.

#### More...

Lets you edit more details of the device, displaying the [Advanced options](#) dialog.

#### OK

Save the new device configuration, and return to the Zetafax - device configuration dialog.

#### Cancel

Cancel the request to configure a device, and return to the Zetafax - device configuration dialog.

#### Related topics

[Configuring devices](#)

[Device Configuration Wizard](#)

[Using Zetafax with Brooktrout fax boards](#)

[Using Zetafax with the HP Digital Sender](#)

[Advanced options](#)

[Automatic printing](#)

[Hardware requirements](#)



## Devices folder

---

Contains devices that have been configured to operate with Zetafax.

While this folder is selected in the left pane, use the **Action** menu or right-click your mouse to add a new device using the [Device Configuration Wizard](#).

The right pane shows the devices within this folder, with the following columns of information:

### Device

The type of the device.

### Device Name

The description given to the device for identification.

### Connected on

The port, channel or controller to which the device is connected.

### Recipient user

The user receiving messages from this device.

### Incoming calls only?

Whether the device is for incoming calls only.

While a device is selected in the right pane, use the **Action** menu or right-click your mouse to edit or delete the device.

### Related topics

[Configuring devices](#)

[Using Zetafax with intelligent fax boards](#)

[Using Zetafax with the HP Digital Sender](#)

[Automatic printing](#)

[Hardware requirements](#)



## Area rules

---

This dialog is primarily for use with USA-style telephone systems.

### Dial the area code with national access for numbers with the following prefixes

This is a list of number prefixes within your area code that must be dialed with both the Area code and National access code.

#### Add

Add a number prefix to the list.

#### Remove

Remove the selected number from the list.

### Do not dial the national access for numbers with the following area codes

This is a list of area codes that are treated as local when dialing from the server's location, and are to be dialed without the National access code.

#### Add

Add an area code to the list.

#### Remove

Remove the selected area code from the list.

#### OK

Save the settings and exit the dialog.

#### Cancel

Discard all changes to the settings and exit the dialog.

### Related topics

[Least Cost Routing](#)

[Configuring Least Cost Routing](#)

[Dialing properties](#)

[Edit area](#)

[Telephone dialing properties](#)

[Enabling LCR](#)



## Dialing properties - Example: Atlanta, USA

---

- Select **USA and Canada** from the list of countries for **Server location**.
- Enter '770' for the **Area code**.

The following information should then be set up automatically:

- '1' for the **National access code**. '011' for the **International access**.
- Select the **Numbers longer than...** option for identifying local numbers, and set the number length to '7'.
- Check the **Always dial Area code (10-digit dialing)** option.
- Leave the **Include the National access** box unchecked.

Now use the test function to check that numbers are converted as expected.

For Atlanta, numbers with area code 404 are also treated as local. To configure this:

- Click the **Area rules** button to enter the Area rules dialog.
- In the **Do not dial National access for numbers with these Area codes** window, click the **Add** button to start the Add number dialog and type '404' in the number field.
- Click **OK** to add the new area code to the list.
- Click **OK** to close the **Area rules** dialog.
- When you are happy with all the settings, click **OK** to leave the **Dialing properties** dialog.



## Dialing properties - Example: London UK

---

- Select **United Kingdom** from the list of countries for **Server location**.
- Enter '0171' for the **Area code**.

The following information should then be set up automatically:

- '0' for the **National access code**.
- '00' for the **International access**.
- Select the **Numbers with Area code always include the National access** option for identifying local numbers.
- Leave the **Always dial Area code** box unchecked.
- Leave the **Include the National access** box unchecked.

Now use the test function to check that numbers are converted as expected.





## Email Gateway Properties

This dialog tab allows you to configure the Email applications that will be connected to the gateway, and to set up the frequency of the service.

### Polling interval

This value represents the time (in seconds) that elapses between each occasion when the gateway looks for messages to transmit. Any value between 1 and 7200 seconds (120 minutes) is permissible. It is recommended that a small value is used to avoid delays in fax transmission. In particular with Exchange systems a value of less than 10 seconds is advised to allow Rush/Hold/Release/Abort commands to function correctly.

### Polling disabled - From:

This value represents the time at which the gateway will automatically go offline.

### Polling disabled - To:

This value represents the time at which the gateway will automatically come online. Leave these values blank for continuous operation.

### Log file creation

If you check this box, the gateway will log all events to a Microsoft Excel compatible file named SEND.LOG in the Z-MAIL/DATA subdirectory. The format of each entry is as follows:

*date / time / sender name / recipient name / fax number*

### Services list

This is a list of all email services that you currently have installed. A service must have a status of enabled if it is to be connected to the gateway. To enable a service, double-click on an entry, or select the entry and choose **Setup**. The dialog that configures the selected Email system will then appear. The following email services may be configured:

[Lotus Notes](#)

[Microsoft Exchange](#)

[SMTP](#)

### Related topics

[Email Gateway enabled](#)

[Email Gateway settings](#)

[Email gateway Installing the Zetafax email gateway](#)

[Setting up email gateway users](#)



## Email Gateway Properties - Applications

---

This dialog allows you to choose the applications that will be used to render email attachments so that they can be transmitted as faxes.

### Available Applications

This lists the applications that may be used to render email attachments as fax images. Double-click on an entry, or select the entry and choose **Install>>** to install the application.

### Installed Applications

This lists the applications that you have currently installed. Double-click on an entry, or select the entry and choose **Delete** to uninstall the application.

### Associate

This option allows you to add your own non-standard file extensions to the list of extensions that are rendered by the current application. It displays the [Configure associations](#) dialog.

### Related topics

[Email gateway](#)

[Email gateway enabled](#)

[Setting up email gateway users](#)

[Email gateway settings](#)



## Email Gateway Properties - Rendering

---

This dialog allows you to choose the quality of the image of rendered attachments.

### Intensity

This slider allows you to choose the intensity of the fax image.

### Quality: Definition

This allows you to choose the definition of the fax image (i.e. the dots per inch or *dpi*).

### Quality: Paper Size

This allows you to choose the paper size of the fax image.

### Related topics

[Email gateway](#)

[Email gateway enabled](#)

[Setting up email gateway users](#)

[Email gateway settings](#)



## Email Gateway Services Configuration

---

This dialog allows you to select the Email systems that will be used with the gateway. The following email systems are supported:

- Lotus Notes
- Microsoft Exchange
- SMTP generic email systems

### Available Drivers

This is a list of all Email systems that may be installed to work with the gateway. Double-click on an entry to install the gateway driver for the Email system you wish to use.

### Installed Drivers

This is a list of all Email systems that are currently installed to work with the gateway. Double-click on an entry if you wish to uninstall the driver.

### Add

This button allows you to install the entry currently highlighted in the **Available Drivers** list.

### Delete

This button allows you to uninstall the entry currently highlighted in the **Installed Drivers** list.

### Related topics

[Email gateway](#)

[Email gateway enabled](#)

[Setting up email gateway users](#)

[Email gateway settings](#)



## Fax over IP - Brooktrout boards

---

After installing your TRxStream Board following the instructions provided.

1. Start up your computer.
2. Cancel the hardware wizard if it automatically starts up.
3. Install the Zetafax Server

[Click here for instructions on how to do this](#)

4. Run the Zetafax configuration program, and



## Fax over IP - Eicon boards

---

The Eicon software fax offering: Eicon Diva SoftIP allows you to send faxes without having to install a separate fax modem. Follow the steps below to set up your fax over IP system.

1. Install your Diva SoftIP software.
2. Insert your USB dongle to register your product.
3. Configure your Diva SoftIP software using the Eicon configuration program that has been installed on your system.
4. Install the Zetafax Sever ([Click here for instructions on how to do this.](#))

When running **Device Configuration Wizard**, the Zetafax Server will automatically detect the Diva SoftIP software as a CAPI device.

5. Add the CAPI device, and continue through the Wizards until completion.



## FaxBroadcast Parameters

---

This dialog allows you to set up sending options specifically for use by the FaxBroadcast Client.

The FaxBroadcast Client allows users to send bulk fax jobs to contacts stored in a number of data formats. Due to the large number of faxes produced, you may wish to configure the server to always send these fax jobs with a background priority, or with a different number of retry attempts.

### Use Standard Server Settings

This is the default option for FaxBroadcast fax jobs, and means that all FaxBroadcast jobs will be treated the same as all other fax jobs.

### Always give Background Priority

All faxes sent via FaxBroadcast will be sent with a Background priority. Allowing fax jobs sent from the Zetafax Client to take priority. With this setting enabled, Users can no longer change the priority of FaxBroadcast fax job from within the FaxBroadcast wizard.

### Number of attempts to dial busy or unanswered fax machines

This option allows you to set the number of times Zetafax should retry a fax number in a FaxBroadcast list before marking the fax as failed. As with the **Background Priority** setting, this option will take precedence over FaxBroadcast wizard settings.



## Cover sheet foreground file

---

The foreground file contains the variable information. This is overlaid onto the background file at sending time. Items such as recipient, sender, date and page number are filled in automatically by Zetafax.

It is stored in a format with extension .EPN. cover sheet files are stored in the C:\Program Files\Zetafax Server\SYSTEM\ZCOVER directory.

The layout of the foreground information supplied with Zetafax is generally sufficient, but it may be changed if required.

To use the same foreground format as one of the example cover sheets, just copy the appropriate .EPN file to the name of your new cover sheet. Otherwise you can create a new foreground in any Word Processor, by using embedded command fields (which must be in one of the Zetafax fonts).

Then set up the Zetafax printer driver and print the foreground. In the addressing dialog, click the Save as... button and save the .EPN file in the C:\Program Files\Zetafax Server\SYSTEM\ZCOVER directory.

There are some example files (for use with the Windows WRITE program) in the C:\Program Files\Zetafax Server\SYSTEM\ZCOVER directory.

An example might be:

```
Date:%%[DATE]  
To:%%[NAME]  
Company:%%[ORGANISATION]  
From:%%[FROM]  
Total Pages:%%[PAGES] (including this)
```

Refer to [The API - Getting Started](#) for more details of the embedded commands.





## General configuration options

Provides general configuration options for the Zetafax Server. To display this dialog, double-click **General configuration options** in **Server settings**, or select the **General** icon from the **Zetafax - configuration options** dialog.

### Zetafax Client

General Zetafax Client configuration options.

#### Use charge codes

Specifies whether the charge code field is enabled on the addressing dialog when a fax is submitted. Charge codes, specified by the user for each message submitted, appear in the billing log when the message has been completed. If this box is checked, the user is always required to enter a charge code in the addressing dialog.

#### Optional

If this box is checked, the user may leave the charge code blank (omitted), in the addressing dialog.

#### Maximum number of previous recipients stored for each user

Specifies the maximum number of entries that will be stored in the list of previous recipients. This is the list that is displayed at the lower half of the addressing dialog when sending a fax. The list is stored in chronological order for each user. When the number of entries reaches this value the Zetafax Client will delete the oldest entries as new entries are added.

#### Allow Automatic Client Updates

If the **Allow automatic client updates** option is checked within the **Zetafax Configuration** program, the Client machines will detect that a new update has become available and allow users to update the next time their Zetafax Client is started.

#### Allow Zetafax Client automatic user creation

If the **Allow Zetafax Client automatic user creation** option is checked within the **Zetafax Configuration** program, new users of the Zetafax Client will be able to automatically create an account, i. e. without Administrator involvement.

### Server

General server configuration options.

#### Number of weekdays to keep the detailed server log files

Specifies the number of weekdays for which you want the detailed log files to be kept (or 0 to disable the detailed logging). These log files are stored in the C:\Program Files\Zetafax Server\SERVER\ZDB directory. The filename follows the format Zyymmdd.LOG, where yyymmdd is the date. Out of date log files are purged when the system is started or restarted.

#### File server supports DOS archive attribute

The Zetafax Client uses the DOS Archive attribute (as modified using the attrib command) to detect changed files. If the file server does not support this attribute (as is the case with some UNIX based systems) this option should not be checked, causing the Zetafax server and Zetafax Client to use an alternative method.

**OK**

Save any changes that have been made to the general configuration options, and exit the Zetafax - configuration options dialog.

**Cancel**

Do not save changes made to the advanced general configuration options, and exit the Zetafax - configuration options dialog.

**Reset**

Reset the general configuration options displayed, to their default settings. The settings are not saved until either **OK** is clicked or another category icon is selected from the scroll (left).

If you using the scrolling icons on the left to move to another **Category** , any changes made to the general configuration options are saved.

**Related topics**

[Zetafax Configuration](#)

[Server settings](#)



## Zetafax Configuration menu commands

To use the Zetafax Configuration program, double-click or open an item in the left pane and select an option in the right-pane. Either select a command from the **Action** menu or right-click on an item for menu shortcuts.

### Action

This menu provides commands to let you work with the selected Zetafax item, plus commands to manage the MMC. It presents Zetafax-specific commands that are appropriate to the currently selected Zetafax item.

### Edit

Lets you edit the item, displaying the dialog appropriate to the type of item. Pressing **RETURN** is equivalent.

### Favorites

Provides commands to let you access and manage the MMC 'favorites'. See the MMC Help for details.

### View

Provides commands to let you control the MMC display. See the MMC Help for details.

### Delete

Use this to delete the selected item.

### Rename

Use this to rename the selected item.

### Help

Use this command to launch context-sensitive help topics.

### Set new Zetafax user defaults

Right-click on **Zetafax users** to use this command, which enables you to set up users or groups of users. See [New user defaults](#) for more information.

### Modify/upgrade license details

Select **Licensing and Registration** in the left-hand pane and right-click to display this command. Use it to modify your license details or install an add-on or upgrade. See [Modify license details](#) for more information.

Export list...

When an item is selected in the left hand pane, use this command to export the list displayed in the right-hand pane. Select a location and name for the file and export as a tab delimited text file or a comma delimited CSV file.



## HPSCAN direct scan-to-fax program

---

Provides configuration options for the HPSCAN program supplied with the HP Network ScanJet 5 and HP Digital Sender devices.

- To display this dialog, double-click **HPSCAN direct scan-to-fax program** in **Server settings**, or select the **HP scanner** icon from the **Zetafax - configuration options** dialog.

### Enable HP Network scanner support

This options turns on the scanner support.

### Directory for files

Specifies the directory that the HPSCAN program polls for HPF files to be faxed. Any files found whose names match the given specification will be interpreted as HPF format files and submitted to the server for sending.

### Scan frequency

Specify the polling interval, in seconds. This is how often the program looks for HPF files in the directory of files that have been scanned to be sent as faxes.

### Delete successful messages

Check this box if faxes that have been sent successfully (i.e. faxes that would be displayed on the Zetafax Client with a tick) should be deleted automatically. This is useful in systems where a large number of faxes are being submitted automatically and you just want to check for any which have failed.

### Guest User

This is the default account the Zetafax server will use if the fax is sent anonymously from the Network Scanner. If this field isn't set, then the server will reject the fax.

### OK

Save any changes that have been made to the HP scanner SETTINGS configuration, and exit the Zetafax - configuration options dialog.

### Cancel

Do not save changes made to the HP scanner SETTINGS configuration, and exit the Zetafax - configuration options dialog.

### Reset

Reset the HP scanner SETTINGS configuration to its default settings. The settings are not saved until either **OK** is clicked or another category icon is selected from the scroll (left).

If you use the scrolling icons on the left to move to another **Category**, any changes made to the HP scanner SETTINGS configuration are saved.

### Related topics

[Using Zetafax with the HP Digital Sender](#)  
[Configuring devices](#)  
[Server settings](#)



## How to install the Zetafax SMTP server

- Insert the Zetafax CD into the CD drive.

The CD will automatically run the Welcome program, which will direct you to the installation files. If it does not run the program automatically:

- Click the Start button, and then click Run.
- Enter D:\RUNME, where D is the letter of your CD drive.
- Click the OK button.
- Follow the on-screen instructions to start the Zetafax SMTP server installation program.
- In the Choose destination location and Choose data location dialogs, click the Next button to use the recommended location, or click the Browse... button to specify an alternative location.
- Continue to follow the on-screen instructions.
- In the Setup Complete dialog, do not uncheck Launch the Zetafax SMTP Control Panel applet.
- Click the Finish button.

The Zetafax SMTP Server Configuration dialog is displayed:

- In the Domain name field enter the domain name of the SMTP email server; for example smtp.smithandsons.com
- In the DNS server field enter the IP address of the DNS server; for example 192.63.124.1
- Click the OK button.
- Continue to follow the on-screen instructions.

You will be prompted to restart the server.

- Click the Yes button.

This completes the installation of the Zetafax SMTP server. You can alter the configuration of the Zetafax SMTP server at a later time from the Zetafax SMTP Server Configuration control panel.

### Configuring the SMTP email system

- Configure your SMTP email system to direct messages addressed to the domain fax to the Zetafax SMTP server.

Since each SMTP email system has its own configuration procedure, if you need instructions on doing this please consult the SMTP email server's own documentation.

### Configuring the Zetafax email gateway for SMTP

The Zetafax email gateway is configured using the Email gateway configuration dialog, opened automatically at the end of the install sequence. If you subsequently need to change the configuration, you can open this dialog from the Zetafax Configuration program (Server Settings dialog).

- In the Email gateway configuration dialog, click the Add Mail... button.
- In the Email Gateway Services Configuration dialog, select SMTP Mail in the Available Drivers list, and click the Add>> button.
- Click the OK button to close the dialog.
- In the Email gateway configuration dialog, click the Configure... button.
- In the Email Gateway Properties dialog, select SMTP Mail, and then click the Setup button.
- In the SMTP Mail Setup Service dialog, enter the data location in the SMTP Mail Path field; for example:

C:\Program Files\Zetafax SMTP Server\Data

If during the installation of the Zetafax SMTP server you specified a different location in the Choose data

location dialog, instead enter the destination folder that you specified at that time.

- In the SMTP domain name field, enter the domain name of the SMTP email system; for example smtp.smithandsons.com
- Click the Test connection button.
- If the test fails, check that:
  - The Zetafax SMTP server has been installed
  - The SMTP Mail path entered above is correct
  - The Zetafax SMTP server service has been started - if necessary restart the operating system
- Click the OK button.

The Email gateway configuration dialog reappears.

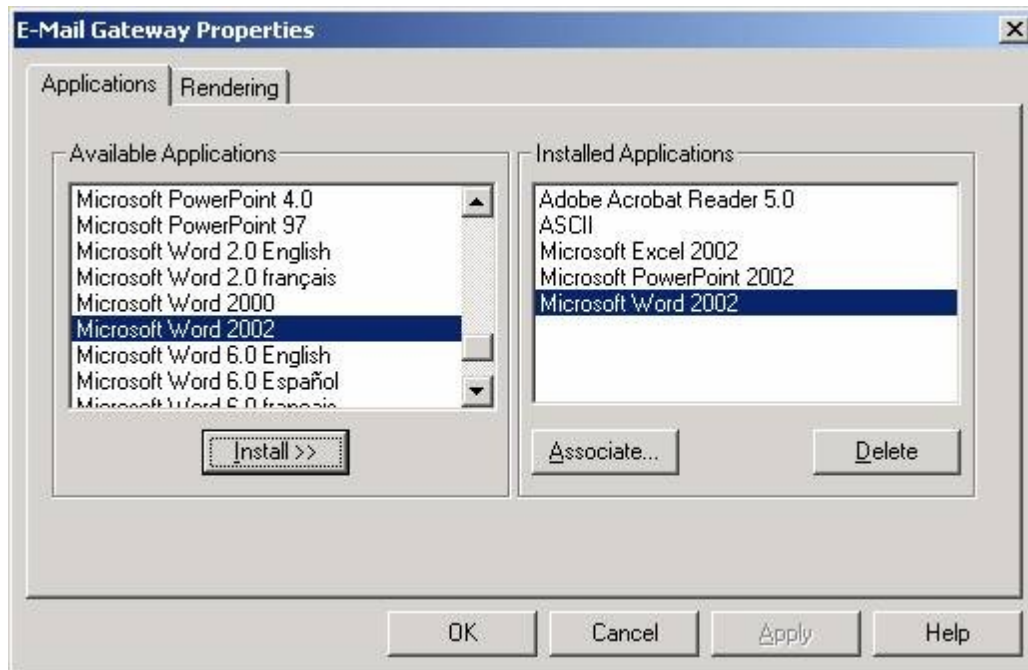
### Configure the rendering options for the email gateway

In the Email gateway configuration dialog, click the Rendering button.

The Email Gateway Properties dialog provides two panels of settings: Applications and Rendering.

#### Applications tab

The options on this tab allow you to register the applications you have installed on the Zetafax server PC with the gateway. Typically, these are the most common applications used by your network users to send faxes:



If a network user attempts to send an email message with an attachment created by an application which has not been registered or installed on the Zetafax server PC, the email gateway will be unable to process the message. You will not be allowed to register an application from this dialog unless it has already been installed on the Zetafax Server PC. You should check that any rendering application you configure can be run without any dialogs being invoked or errors displayed on start up or shut down.

**Note:** Within this dialog, numerous versions of the same program are listed. It is important that the version of each application you specify exactly matches the version you are using on the Zetafax server PC.

If users on your network are using multiple versions of the same applications, such as Office 97, or Office 2000, you should install the latest version of the software on the Zetafax server PC to generally ensure backwards compatibility.

You must install the ASCII driver as an absolute minimum. This is the driver which converts the text of the email message itself.

### Rendering tab

This allows you to select the quality of rendering you require.

You must click on this tab the first time to install the gateway's rendering printer driver. The email rendering subsystem printer driver will then become visible the next time you start the Print Manager.

The printer driver will not be installed successfully under Windows XP Professional, Windows 2000, or Windows NT 4 unless the user account which you are currently using has administrator privileges.

When you have configured the Applications and Rendering settings:

- Click the OK button.

The Email gateway configuration dialog reappears.

### Configuring Zetafax users to use the email gateway for SMTP

Zetafax supports a range of SMTP servers; unfortunately there is no common way to automatically import lists of email users from these email servers. To enable these users, follow the instructions below:

- Export the list of email addresses from the SMTP server.

Consult your email server documentation for information on how to obtain this list.

- Using Notepad or another suitable text editor, format each entry as follows:  
First name,Last name,email address

For example:

Jim,Jones,jjones@domain.com  
Brian,Bull,bbull@domain.com  
Sam,Smith,ssmith@domain.com

- Save the file as IMPORT.TXT.
- Launch the Zetafax Configuration program and navigate to Users and user groups.
- Select Email gateway users and click the Refresh button.
- Click the Browse... button and select the file IMPORT.TXT saved earlier.
- In the Import Domain Name field, enter the email domain for your SMTP server services, e.g. domain.com and click the OK button.

The imported users will now appear in the right pane of the Email gateway users list with an SMTP prefix. You now need to configure users that may use the email gateway. Each SMTP user can either use their own individual Zetafax account or they can share an account called a 'mail user profile' account.

### Private accounts

- Select one or more imported users in the right pane.
- Click with the right mouse button and choose Enable from the pop-up menu.
- In the Enable Email Users dialog, select Private accounts and click the OK button.
- In the Email Account Name Generation dialog, select the preferred Alias name generation option and click the OK button.

If you selected several users, they will now be enabled. If you selected a single user, the Zetafax user details dialog shows additional options for the user.

- Click the OK button to confirm the details.

The enabled users will now appear in the right pane of the Email gateway users list with their private account as the Zetafax user name.

### Email profile accounts – SMTP

Email profile accounts allow a number of SMTP users to share a Zetafax account. As a result, fax reporting will identify all faxes sent by SMTP users as from this profile, rather than from individual users.

**To configure this option:**

- Select one or more imported users in the right pane.
- Click with the right mouse button and choose Enable from the pop-up menu.
- In the Enable Email Users dialog, select Single shared account and click the OK button.
- In the Choose email user profile account to use dialog, leave (new) selected and click OK.
- In the Add new Zetafax email user profile dialog, enter SMTP and click OK.
- In the Zetafax user details dialog, click OK.

The enabled users will now appear in the right pane of the Email gateway users list with the email user profile account as their Zetafax name.

You can use email user profiles to group users into manageable units with identical user defaults.

**Sending a fax message**

Sending a fax message is simply a matter of sending the message by e-mail to an e-mail address consisting of the fax number, followed by @fax:

- Launch your e-mail client program.
- Create a new message.
- In the To: field, enter a fax number followed by @fax, for example 01234-865213-@fax.
- Complete the Subject and body fields of the message.
- Send the message.

The message is then sent via the SMTP gateway to the server for transmission. When the fax has been transmitted, the SMTP gateway sends you an acknowledgement.

The characters allowed in the fax number are:

- the digits 0-9 for example 17701234567@fax
- the international dialling character '+', for example +1770.123.5678@fax Zetafax automatically replaces this by the configured international dialling prefix upon dialling
- Zetafax ignores period '.' and minus '-'.

**Specifying the name**

When you address a fax using just the fax number as described above, the Name field on the cover sheet or letterhead will be blank. If you want to specify the text for the Name field, you use the following form of address:

Name<faxnumber@fax>

For example:

Sam Smith<123456789@fax>

In the Name position, the /, \, [, ], (, ) and ~ characters have special meaning, so you are unable to use them directly in a name. To include any of these in the name you must precede it by a \ character. For example, to set the name to: Sam Smith/Sally Smythe you use:

Sam Smith\ /Sally Smythe<123456789@fax>

Like addresses of all forms, this may be stored in your e-mail client program's address book.

**Specifying the organization**

Similarly unless you specify the Organization text, it will be blank on the cover sheet or letterhead. If you want to specify the Organization text for the Name field, you use the following form of address: name (organization)<faxnumber@fax>

For example:

Sam Smith (Smith and Sons)<123456789@fax>



### Specifying the cover sheet or letterhead

Normally when you send a message, Zetafax will use the default configured cover sheet. If instead you wish to specify the cover sheet to be used for the message, you can add a special option to the end of the message's Subject: text:

Subject line text /cov=cover sheet\_name

For example:

Project Outline /cov=formal

will cause the message to use the cover sheet named 'formal'.

Where Zetafax is configured to use a cover sheet by default for each message it sends but you wish to send a message without a cover sheet, you use the same option but omit the cover sheet name, for example:

Project Outline /cov=

You may specify a letterhead in a similar way:

Subject line text /let=letterhead\_name

For example:

Our meeting /let=corporate

to use the letterhead named corporate, and

Our meeting /let=

to use no letterhead instead of the default letterhead.

### Specifying send time and date

Normally your message is sent at a time that is configured for you or your user group - usually as soon as higher priority messages have been sent. You may delay the sending by specifying a send time option on the end of the Subject:

Subject line text /[option=value]

The available options are:

Option Description

/after=yy-mm-dd Send after the specified date

/after=hh:mm[:ss] Send after the specified time

/offpeak Send in the off-peak period.

For example:

Our meeting /letter=corporate /offpeak

causes the message to be sent in the off-peak period.

### Previewing

You may specify that the message be sent as a preview to you rather than to the recipient, allowing you to check it before resending it as normal. You specify a preview using an option on the end of the Subject:

Subject line text /preview

For example:

Our meeting /letter=corporate/preview

After viewing the preview, to send the message to the recipient, remove the /preview option and re-send it.



## Installing Remote Administration

This section explains how to install the Remote Administration program, allowing a network administrator to monitor and configure the Zetafax server programs from a remote computer, rather than from the computer running the server programs.

### Installing the program

The Remote Administration program should be installed on the computer on which you want to carry out the administration functions, such as the network administrator's own computer.

To install the Remote Administration program

- Put the Zetafax CD-ROM in to the drive.

If the CD does not automatically run a setup program:

- Click the **Start** button, and then click Run.
- Enter D:/RUNME, where D is the letter of your CD drive.
- Click the **OK** button.

When the CD setup program starts, follow the on-screen instructions to find and select the Remote Administration installation option. This will take you to the Equisys website from which you can download the Remote Administration installer. Follow the on-screen instructions to download the installer and run it on completion of the download.

If the computer does not already have Microsoft Management Console ('MMC') installed, the installation will offer to install it:

- Click **Yes**.
- Continue to follow the on-screen instructions to complete the installation.

### Configuring the program

Before the Remote Administration program can be run, it must be configured.

- Click the **Start** button, point to **Programs**, and then click **Zetafax Configuration**.
- Wait for the configuration program to start.
- In the left pane, click **Server settings**.
- In the right pane, double-click **Zetafax server remote administration**.
- In the **Zetafax server computer name** box, enter the name of the computer that is running the Zetafax server.
- Select the remote administration functions you wish to enable.

**Allow remote server monitoring** displays any server messages to the remote administrator.

**Allow remote server restart** lets the remote administrator restart the server.

**Allow remote device control** lets the remote administrator configure devices.

**Allow remote link control** lets the administrator set up Least-cost Routing.

The allow remote link control option is available only if Least-cost Routing is enabled, as described in the [Least-cost Routing](#) topics. If you wish to change the queue status update frequency (the period of time in seconds between updates to the display of the queue status), adjust the **Queue status update frequency** control. Click **OK**.

**Note:** Changes made to this section only affect Zetafax users with administrator privileges, and who have installed the remote administration software. No other users can administer the Zetafax server remotely.



## Installing the Zetafax API

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The Zetafax API offers five methods of automatically submitting messages to the Zetafax server, the automatic submission program, embedded addressing, DDE and the COM and C language libraries which are all independent. This section explains how each feature is installed on your system. You should refer to the appropriate section once you have decided which method you intend to use.

Licensing of the API depends on which API product you have purchased. For users of Zetafax network fax software, please refer to the section entitled "Zetafax API Toolkit", and for Equisys (Independent Software Vendor) ISV partners, please refer to section entitled "Zetafax engine".

### Zetafax API Toolkit

If Zetafax is currently up and running on your network, then the automatic submission, embedded addressing and DDE features of the Zetafax API are already installed! You only need to activate these features by adding the API toolkit license number in the modify license details dialog in the **Zetafax Configuration** program.

### Fax engine

If Zetafax has been supplied to you as an Equisys (Independent Software Vendor) ISV partner, there is no need to add a separate API license as described above. The Zetafax fax engine products supplied to ISV partners include the API license as standard within the starter system license number.

### ZSUBMIT

The ZSUBMIT program is distributed with the Zetafax server programs, and is stored in the same directory as the other programs (zfax \SERVER by default, where zfax is the server base directory specified when Zetafax was installed).

### Embedded addressing

Embedded addressing requires the Zetafax printer driver to be installed on all of the Zetafax clients wishing to use this feature. The Zetafax printer driver is installed by running the **Workstation Setup** program (WKSETUP) - refer to the *Installation and Configuration Guide* for detailed instructions on using this program. There is limited support for embedded addressing available without the API, and the full functionality is provided when the API toolkit has been purchased.

### DDE

Support for Dynamic Data Exchange (DDE) is built in to the Zetafax client software. As for embedded addressing, there is limited support for DDE in the standard Zetafax software. Full support is available only when the API toolkit has been purchased.

### C language API

The C language libraries and 32-bit dynamic link library are provided separately in a self-extracting executable. The appropriate libraries need to be copied into your development environment and if used, the DLL needs to be copied to the relevant location. Please refer to the API help for more detailed information.

Programs written using the Zetafax C language API may only be run on Zetafax systems with an API license.

### COM API

Like all COM components ZfAPI32.dll must be registered before it can be used. This is done using the

---

program regsvr32 as follows:

1. Change directory to location of ZfAPI32.dll.
2. Run %system32%\regsvr32 ZfAPI32.dll.
3. A dialog should appear confirming that the registration was successful.



## Inward routing rules

---

Lets you work with rules that control the routing of messages received by the current user or group.

The content of the dialog changes to reflect the rule type selected.

### **Sub-address - Routing using addressing information sent with the fax**

Selects Sub-address rules, displaying the [Inward routing rules \(Sub-address\)](#) options.

### **Sender ID - Routing based on who the sender of the fax is**

Selects Sender ID rules, displaying the [Inward routing rules \(Sender ID\)](#) options.

### **Forwarding - Automatic forwarding from one user to another**

Selects Forwarding rules, displaying the [Inward routing rules \(Forwarding\)](#) options.

### **Related topics**

[Zetafax users](#)

[Set new Zetafax user default](#)

[Zetafax user details](#)

[Inward routing rules \(Sub-address\)](#)

[Inward routing rules \(Sender ID\)](#)

[Inward routing rules \(Forwarding\)](#)



## Inward routing rules - Forwarding

---

Provides options to modify and add forwarding rules.

### Messages for

The name of the user to whom the message was sent.

### Keep copy of original messages

Select this option to keep a copy of the original message that is forwarded.

### Route to

The name of the user to whom the message is to be forwarded.

### Related topics

[Zetafax users](#)

[Set new Zetafax user default](#)

[Zetafax user details](#)

[Inward routing rules](#)

[Automatic inward routing](#)

[Software configuration](#)



## Inward routing rules - Sender ID

---

Provides options to modify and add sender ID rules.

### Messages for

The name of the user to whom the message was sent. If you want the rule to match messages regardless of the user to which they were sent, select **(unaddressed)**. Such rules takes lower precedence than rules that do specify a user.

### Sender ID

The sending fax machine's station identifier (CSID) or the sending line's Calling Line Identification (CLI). Only digits and letters are significant. You may also enter spaces and other formatting characters, and those there are retained, they are ignored.

### Organization

The name of the sender's organization. The Zetafax Client In folder displays this to aid identification of the fax sender.

### Route to

The name of the user to which messages to the specified user and with the specified Sender ID will be routed. To cause the rule to simply add the organization name and not reroute the message, select **(none)**.

### Related topics

[Zetafax users](#)  
[Set new Zetafax user default](#)  
[Zetafax user details](#)  
[Inward routing rules](#)  
[Automatic inward routing](#)  
[Software configuration](#)





## Inward routing rules - Sub-address

---

Provides options to modify and add sub-address rules.

### Sub-address

The sub-address of the number to which the message was sent.

### Route to

The name of the user to which messages with the specified sub-address are to be sent.

### Related topics

[Zetafax users](#)

[Set new Zetafax user default](#)

[Zetafax user details](#)

[Inward routing rules](#)

[Automatic inward routing](#)

[Software configuration](#)



## Least Cost Routing - Destinations

---

Before you can set up rules to route faxes to different servers on the network, you must first tell Zetafax about the possible destinations for faxes.

Destination definitions include **Countries**, **Areas** within countries, and **Regions** consisting of combinations of countries and areas.

### Countries and areas tab Country

This is a list of all the current country definitions, with dialing codes. A list of countries and their dialing codes is supplied with Zetafax. The list is compiled from the International Telecommunications Union (ITU) list, and should not require frequent modification.

#### New area

Click this button to define a new area within the selected country. The Edit area dialog is started.

#### Edit

Click this button to edit the currently selected destination. If an area is selected the Edit area dialog is started, otherwise the Edit country dialog is started.

#### Delete

Click this button to delete the selected area or country.

#### New country

This button starts the Edit country dialog to define a new country.

#### Area

This is a list of all the areas defined within the country selected in the Country list.

### Regions tab Regions

This is a list of all the currently defined regions.

#### New region

Click this to start the Edit region dialog and define a new region.

#### Edit

This button starts the Edit region dialog and allows you to edit the currently selected region.

#### Delete

This deletes the currently selected region definition.

#### OK

Saves the destination definitions, and closes the dialog.

#### Cancel

---

Discards the changes made to the destination definitions, and closes the dialog.

**Related topics**[Edit area](#)[Edit country](#)[Edit region](#)[Least Cost Routing dialog](#)[Least Cost Routing](#)



## Edit area

---

Area definitions will often be similar to the country's standard area dialing codes, but this need not always be the case. An area definition may be as precise as to match a single number only, or broad enough to include many standard dialing codes.

### Country

This displays the name of the country in which the area is defined.

### Area description

Type the display name of the area.

### Area ID

An ID will be auto-typed here as you enter the description, and is for internal use only. This can only be edited when a new area is being defined, and must contain only letters and numbers without spaces.

### Match numbers starting

Type a number prefix that is to be considered part of the area here. You must remove the National access code (usually '1' for USA numbers or '0' for European numbers, see [Dialing properties](#) for more information).

### Match whole number only

Check this box if the whole number is to be matched. By default this box is left unchecked, so that an area 171 matches 171 333 4444.

### Add to list

Click this button to add the number in **Match numbers starting** to the **Match numbers** list.

### Modify

Replaces the number selected in the **Match numbers** list with the entry in the **Match numbers starting** field.

### Remove

Removes the current selection from the **Match numbers** list.

### Match numbers

This is a list of all the numbers that are part of the area.

### OK

Save the area definition, and close the dialog. If there is a number in the **Match numbers starting** field which hasn't been added to the **Match numbers** list, it will be added first.

### Cancel

Discard changes to the area definition and close the dialog.

## Related topics

[Least Cost Routing dialog](#)  
[Least Cost Routing](#)



## Edit country

---

### Country description

Enter the name of the country.

### Country ID

An internal identifier will be auto-typed here as you enter the description. This field can only be edited when defining a new country, and must contain letters and numbers only without spaces.

### Dialing code

Enter the (unique) international dialing code for the country. Countries that share an international dialing code may only have a single entry in the list (e.g. USA and Canada both have dialing code '1', and must therefore share an entry in the list).

### OK

Save the settings and exit the dialog.

### Cancel

Discard changes to the country definition and close the dialog.

### Related topics

[Least Cost Routing dialog](#)

[Least Cost Routing](#)



## Edit region

---

### Region description

Enter a description of the region.

### Region ID

An internal identifier will be auto-typed here as you enter the description. This field can only be edited when defining a new region, and must contain letters and numbers only without spaces.

### Destinations

This is a list of all the countries and areas included in the current definition of the area. Double-click an item to remove it from the list.

### Add

Adds the current selection in the **Area** or **Country** list to the list of **Destinations** included in the region definition.

### Remove

Removes the area or country that is currently selected in the **Destinations** list.

### Country

This is a list of all the currently defined countries that are available to be added to the region definition. Double click a country to add it to the region definition. Selecting a country causes the areas defined within that country to be listed in the **Area** list.

### Area

This is a list of the areas defined within the selected **Country** . Double click an area to add it to the region definition.

### OK

Save the region settings and exit the dialog.

### Cancel

Discard changes to the region and exit the dialog.

### Related topics

[Least Cost Routing dialog](#)

[Least Cost Routing](#)



## Least Cost Routing - Edit Link

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### Link description

Enter an informative description of the link, 'New York server' for example.

### General tab Remote server ID

Enter the identity of the remote server to link to. This must be identical to the remote server's **Local ID**, defined in the remote server's General settings, and must contain letters and numbers only, without spaces. This field can only be changed for new links, so it is important that this ID is typed correctly when a new link is configured. If you need to change this field later, you must return to the Links window, and **Copy** the link. This will create a new link with all the original settings except the remote server ID. Type the corrected ID, then **Delete** the original link.

### Link password

Enter a password for encryption of all transactions on the link. It is vital that the same password is entered at both ends of the link, otherwise communication will not be possible.

This field will itself be encrypted when the dialog is closed.

If this field is left blank, transactions over the link will not be encrypted. Submit messages to remote server for it to send

Check this box to allow your server to submit faxes to the remote server for sending. If the box is left unchecked, the link may only be used for the remote server to submit faxes to your server.

### Accept messages from remote server for sending locally

Check this box if you want your server to process fax submissions from the remote server.

If either the **Submit messages..** or the **Accept messages..** box is left unchecked, care must be taken to ensure that the complementary box is also unchecked at the remote server so that the settings are compatible. For example, configuring both servers to allow sending but not receiving will result in a deadlock where no faxes are sent over the link in either direction. Zetafax user account to use for submitting messages locally

If the link is configured to process incoming messages a Zetafax user account must be specified. This account will be used to send faxes submitted to the local server by the remote server. You may wish to set up a new Zetafax user for each link, or to use a single account for all links. In either case, a new account can be set up now by selecting **(new)** from the top of the list of available Zetafax accounts. When you close the dialog, or attempt to move to a different tab, you will be prompted to enter some more information about the new account (see Adding a new user). Start link in SHUTDOWN state (new links only)

New links will normally be started up as soon as the setup is finished. Check this box to set up a new link, but leave it shut down initially. The link can then be opened later from the Zetafax server program.

### Reinitialize link (existing links only)

Select this option to reinitialize the link when the **Links** dialog is closed.

### Communications tab Link type

Select the method of communication for the link: WAN, Email (fast) for standard email systems, or Internet mail for slower or less reliable email systems.



### Remote server's WANInbox (WAN links)

Enter the path of the remote server's Inbox on the network, as set up in the remote server's **General settings**. You may enter the path either as a Universal name (UNC) (e.g. \\Server\_name\Folder\WANInbox), or you can enter a network drive mapping (e.g. K:\Folder\WANInbox), which Zetafax will convert. Click '...' to browse for a folder.

### Email address

This can either be a name from the email system's address book, or a standard SMTP type address of the form @.com. For other types of address please include the appropriate prefix (e.g. SMTP:).

### Maximum link delay

For both WAN and email links, Zetafax requires some information about the speed of transmission of messages over the link for LCR to work effectively. This should be an estimate of the *maximum* length of time it should take a message to pass from one server to the other. A default value, which depends on the type of link configured, will be suggested.

### Test

This function tests communication over the link, and reports the outcome.

For WAN links it ensures that the WAN Inbox folder can be found, and that the server has the necessary access privileges to copy files to the folder.

For email links Zetafax will attempt to log into the email account that was set up in General settings, and send a test message to the address of the remote server. Zetafax will report any problems logging in or attempting to send the message, but you must also check the email account itself to make sure that the message wasn't bounced back at a later stage because the address could not be found, for example.

### Priority tab Messages submitted to remote server for sending

#### Maximum message priority

Select the maximum priority of faxes to be sent via this link. Higher priority faxes will not be sent over this link. Messages received from remote server for sending locally

#### Maximum message priority

Select the maximum priority of faxes to accept from the remote server over this link.

#### Action on higher priority messages

Choose what to do for higher priority messages submitted over the link. Select **Reject** to reject the message, or **Reduce priority** to process the message with a reduced priority.

### Watchdog tab

The link watchdog sends regular check messages to the remote server so that the remote server can monitor the integrity of the link.

If an expected check message is not received, the remote server will assume that the link has failed, will route faxes elsewhere immediately.

Using the watchdog on unreliable links is not recommended, since the link may be closed unnecessarily (although it will restart automatically as soon as messages are received again).

#### Enable link watchdog

Check this box to start the link watchdog.

#### Watchdog message frequency

This is effectively the maximum amount of time that the link can be offline for (e.g. if you need to shut down the Zetafax server to reboot the machine) before it is failed by the remote server. A default value of 15 minutes is suggested.

The remote server must also be running the Link watchdog if the link integrity is to be monitored from your server.

[<< Previous link](#)

Save the settings for this link, and edit the settings for the previous link in the list.

[Next link >>](#)

Save the settings for this link, and edit the settings for the next link in the list.

**OK**

Save the settings for this link, and close the **Edit link** dialog.

**Cancel**

Lose all changes to the settings for the link, and close the **Edit link** dialog.

**Related topics**

[Least Cost Routing dialog](#)

[Least Cost Routing](#)



## Edit rules

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### Rule description

Type an informative description of the rule you would like to create. This will simplify the stages of defining the rule, and will help in understanding your rules later. Example descriptions include 'Send all urgent faxes via the local server' and 'Send all faxes for Europe via the Paris server'.

### Summary tab Faxes to these destinations

A list of destinations currently included in the rule. Double click an item here to jump to the **Destinations** tab.

### Which also fulfill these criteria

A list of the other criteria (e.g. Users, times) that are included in the rule definition. Double click an entry to jump to the relevant tab.

### Will be sent using these Zetafax servers

A list of the servers to be used to send faxes matching the rule.

### Destinations tab

#### Rule applies to messages to any destination

Select this button for a rule that matches any destination.

#### Rule applies to messages to the following destinations only

Select this option to define a rule that only applies to faxes to particular destinations.

This list then specifies the destinations to which the rule applies. Double-click an entry to remove it from the list.

#### Add

Add the item selected in the **Region** , **Country** or **Area** list to the rule.

#### Remove

Remove the selected item from the rule.

#### New location

Click this button to start the LCR Destinations dialog, allowing you to change **Area** , **Country** and **Region** definitions.

#### Region

This is a list of the Regions available for adding to the rule. Double-clicking an entry will add the region to the rule.

#### Country

This is a list of the Countries available for adding to the rule. Double-clicking an entry will add the country to the rule. Selecting a country will cause all of its area to be displayed in the **Area** list.

## Area

This is a list of the Areas in the selected country that are available for adding to the rule. Double-clicking an entry will add the area to the rule.

## Priority tab

### Rule applies to messages of any priority

Select this option for a rule that applies to messages of any priority.

### Rule applies to these priorities only

Select this option for a rule that applies to messages of specific priorities.

### Urgent, Normal, Background

Check any combination of these boxes to specify which message priorities the rule will apply for.

## Users tab

### Rule applies to messages sent by any Zetafax user

Select this option for a rule that applies to messages submitted by any user.

### Rule applies to the following users only

Select this option for a rule that applies only to specific users.

The list below then specifies the users for which the rule applies. Double-click an entry to remove it from the list.

### Add

Adds the selected user from the **Users not included in rule** list to the rule.

### Remove

Removes the selected user from the rule.

### Users not included in rule

A list of all the current Zetafax users that can be added to the rule definition.

## Time tab

### Rule applies at any time of day

Select this option for a rule that applies at any time of day.

### Rule applies at OFFPEAK times only

Select this option for a rule that only applies at OFFPEAK times. (See Off peak time options for definition of OFFPEAK times).

### Rule applies at all times except OFFPEAK times

Select this option for a rule that applies at all times except OFFPEAK times. (See Off peak time options for definition of OFFPEAK times).

### Rule applies at specific times given below

Select this option for a rule that applies at specific times, defined using the **From** , **To** and day boxes below.

#### Mon, Tues, Weds, Thurs, Fri, Sat, Sun

Check the days on which the rule should apply *all day*.

#### From, To

Specify the times during which the rule should apply (24-hour, 00:00 23:59) on all days *other* than those specified above. For example, for a rule to apply between 8am and 5pm, set **From** : 08:00 **To** : 17:00, and for a rule to apply between 6pm and 7am set **From** : 18:00 **To** : 07:00.

#### Size tab

##### Rule applies to messages of any size

Select this option for a rule that applies to messages of any size.

##### Rule applies to LARGE message only

Select this option for a rule that only applies to large messages. Now use the edit box to set the minimum number of pages for the rule to apply.

##### Rule applies to SMALL messages only

Select this option for a rule that only applies to small messages. Now use the edit box to set the maximum number of pages for the rule to apply.

#### Servers tab

##### The message will be submitted to the first available server in the following list

This is a list of the remote servers to which messages matching the rule will be submitted.

The order of the servers in the list is very important, because the Zetafax server will try submitting to the remote servers in the order that they are listed here.

Once some servers have been added you can move a server up or down in the list by selecting it, then clicking <<Up>> or <<Down>> .

Double-clicking an item removes it from the list. <<Up>>

Move the selected server up one place in the server list. <<Down>>

Move the selected server down one place in the server list.

#### Add

Add the selected server in the **Other servers available for sending messages** list to the rule.

#### Remove

Remove the selected server from the rule.

##### Other servers available for sending messages

This is a list of all of the remote servers to which links have been configured (see LCR Links).

The list will also include your local server. See Configuring LCR for more than one site for details about the difference between selecting your local server from this list and checking the **Use local server if no others are available** box.

##### Use local server if no others are available

If this box is checked, faxes matching a rule where no remote servers are specified, or where none of the servers specified are available on the network, will be sent directly from the local server. If this box is left unchecked messages matching the rule will never be submitted to the local server.

[<< Previous rule](#)

Save the settings for this rule, and edit the previous rule in the list.

[Next rule >>](#)

Save the settings for this rule, and edit the next rule in the list.

[OK](#)

Save the settings for this rule and exit the dialog.

[Cancel](#)

Discard changes to this rule and exit the dialog.

**Related topics**

[Least Cost Routing dialog](#)

[Least Cost Routing](#)



## Least Cost Routing - General Settings

### Local server ID

The unique identifier for your Zetafax server on the LCR network. This must contain only letters and numbers, with no spaces.

### Local server description

This is a more informative description of your server, and will be used to refer to the server at other points in the setup procedure.

### Allow email links

Check this box to use email to submit and receive faxes from remote servers. You must now enter the details of the account Zetafax will use to send and receive email:

#### Email type

Select the appropriate email system from the list. If your email system is **Microsoft Exchange**, select Microsoft Exchange. For any other MAPI compliant email system, except Lotus Notes, select **Other (MAPI compliant)**. If you are using a Lotus Notes email system, it is important that you select the correct version of Lotus Notes. For recent systems, version 4.1.1 or later, select **Lotus Notes (V4.1.1 or later)**. For earlier versions select **Lotus Notes (pre V4.1.1)**.

#### Email account or profile

Enter the account name or profile of the account to use. Zetafax will suggest an appropriate default according to the **Email type** setting.

#### Password

Enter the password for the account.

**Note:** For older versions of Lotus Notes (pre version 4.1.1) and for any version of Lotus Notes running on Windows 95, it is important that the account to be used does not have a password (leave the password field blank).

#### Notes userID file (Lotus Notes V4.1.1+ only)

Enter the name of the userID file to use to log into Lotus notes. Zetafax will suggest a default ID, or use the '...' button to browse for a userID file.

#### Notes location (Lotus Notes V4.1.1+ only)

Select the location to use with Lotus Notes. Zetafax will try to find the default location, and will suggest this as an initial setting.

#### Check Inbox every (hh:mm)

This setting determines how often Zetafax will check the account for messages from other servers on the network. The default setting is 00:00, for most frequent checking. If you are concerned about overloading your email server by frequent monitoring of the account, you may wish to set a longer check interval. Be aware that a large value here will affect the amount of time taken for messages to travel between servers, and values for Maximum link delay must be chosen accordingly (see Edit link).

**Test**

Click this button to test the Email settings. Zetafax will attempt to log onto the account, and will report the result. This may affect other email programs that are logged into the account at the time, including the Zetafax server if it is running.

**Allow WAN links**

Check this box to Submit and receive faxes from remote servers by copying files into shared folders on the network.

**WAN Inbox folder**

This is the path of the folder where the local server is to look for messages from other servers on the network. You can enter the folder path either as a Universal (UNC) address (e.g. \\Server\_Name\Folder\WANInbox), a network drive mapping, which Zetafax will convert (e.g. K:\Folder\WANInbox), or a local drive path (e.g. C:\Folder\WANInbox). Use the '...' button to browse for a folder.

**Check Inbox every (hh:mm)**

This determines how frequently the Inbox is checked for new messages. The default is 00:00 for frequent checking, but this can be increased to a larger value if there are concerns about frequent network access. Care must be taken when specifying large values, as this will affect the amount of time taken for messages to travel between servers (see Maximum link delay - Edit link).

**Test**

The test function ensures that the folder path has been typed correctly, and that the server has the necessary access privileges. Zetafax will attempt to find the folder, test reading and writing in the folder, and will then report the outcome.

**OK**

Save the settings and exit the dialog.

**Cancel**

Discard changes to the settings and exit the dialog.

**Related topics**

[Least Cost Routing dialog](#)

[Least Cost Routing](#)





## Least Cost Routing - Links

---

This section allows you to enter some information about other LCR servers on the network.

### Remote servers

This is a list of all of the remote servers to which a link is currently configured. Double clicking on a server brings up the Edit link dialog and allows you to edit the link properties.

#### New

Set up a new link to a remote server. Starts the Edit link dialog.

#### Copy

Copies the settings of the selected link, and enters the Edit link dialog.

#### Edit

Edit the settings for the selected link. Starts the Edit link dialog.

#### Delete

Removes the link to the selected remote server.

#### OK

Save the current settings and exit the dialog.

#### Apply

Save the current settings keeping the dialog open.

#### Cancel

Close the dialog losing all changes.

### Related topics

[Least Cost Routing dialog](#)

[Least Cost Routing](#)



## Least Cost Routing - Rules

---

Routing rules are of vital importance to LCR, since they determine which server on the LCR network each fax is submitted to for sending.

Each rule specifies a number of criteria for faxes, such as destination, priority, size, time of sending, and the user that is sending it. The rule also includes a list of remote servers to which faxes matching the rule's criteria should be routed.

The Zetafax server checks each fax prepared for sending against each rule in turn. If the criteria of the fax match those of the rule, the server attempts to submit the fax to the first remote server in the rule's list. If that server is not available on the network, the other servers in the list are tried in turn. If the end of the list is reached the fax may then be sent directly from the local server.

### Display criteria

#### Show all rules

When this option is selected, the **Rules** list displays all of the currently defined rules.

#### Mark filtered rules

When this option is selected, the **Rules** list displays all of the currently defined rules, but rules matching the filter are marked with an asterisk (\*).

#### Show filtered rules only

When this option is selected, the **Rules** list displays only the rules that match the current filter. Each rule is labeled with a number representing the position of the rule in the list of all rules for reference.

### Set filter parameters

This button starts the Rules filter dialog, to define the Rules filter.

### Rules

This is a list of rule definitions. The contents of the list are determined by the **Display criteria**. The *order* of the rules in the list is very important, because Zetafax starts from the top of the list, and uses the first rule that matches the submitted fax to decide which server to use.

You can change the order of the rules by selecting the rule to use, then clicking the <<**Up**>> and <<**Down**>> buttons.

Double-clicking a rule in the list opens the Rule edit dialog, allowing you to change the definition of the rule.

#### <<Up>>

Moves the selected rule in the **Rules** list up a place.

#### <<Down>>

Moves the selected rule in the **Rules** list down a place.

### New

---

Create a new rule. Opens the Edit rule dialog.

**Edit**

Opens the Edit rule dialog, allowing you to change the definition of the rule.

**Delete**

Delete the selected rule from the **Rules** list.

**OK**

Save the rules and exit the dialog.

**Apply**

Save the rules, keeping the dialog open for further editing.

**Cancel**

Discard all changes to rules, and exit the dialog.

**Related topics**

[Configuring LCR for more than one site](#)

[LCR - Rules filter](#)

[Edit rules](#)

[Least Cost Routing dialog](#)

[Least Cost Routing](#)



## Rules filter

---

This facility allows you to check that the rules will behave as intended.

The filter works by showing you which rules in your list will apply to faxes with certain parameters. For example you may set up the filter to show which rules affect faxes to New York, or which rules affect Urgent faxes.

You can also see which rules would cause faxes to be routed to a particular remote server.

### Filter category

This is a list of rule criteria that can be filtered - **Destination** , **Priority** , **Size** , **Time** , **User** , or **Server** . When you select a category another control is displayed, allowing you to specify the filter setting.

#### Display all rules which include any requirement in that category

Check this button to match all rules that have any requirements in the specified filter category. For example, if the **Filter category** is set to **User** , selecting this option will mean that the filter matches rules that have any users specified, but not rules that apply to any user.

#### Display rules which match these requirements

Check this button to match the requirements specified. For example, if the **Filter category** is set to **User** , and user Jim Jones is selected from the **User list** , the filter will only match rules that apply to Jim Jones. (This will include rules that have Jim Jones specified as a user *and* rules that apply to any user.)

## Destination filters

### Country or Region

Select a country or region from the list to filter for. Selecting a country will bring up the list of areas within that country in the **Area** list. If no area is selected the filter will match the entire country.

### Area

This will contain a list of the areas defined within the country selected in the **Country or Region** list. Select an area to filter for, or select (all areas) to match the entire country.

## Priority filters

### Priority

Select a priority of fax to match for.

## Server filters

### Server

Select a server to match for. The filter will match all rules that have the selected remote server in their server list.

## Size filters

### Size

---

Enter the number of pages. The filter will match all rules that apply to faxes of this size.

### Time filters

#### Time

Enter a time of day (24-hour clock format, 00:00 to 23:59).

#### Day

Select a day of the week. The filter will match all rules that apply at the given **Time** on this day of the week.

### User filters

#### User

Select a Zetafax user from the list. The filter will match all rules that apply to faxes submitted by this user.

#### OK

Save the filter settings and exit the dialog.

#### Cancel

Discard the changes to filter settings and exit the dialog.

#### Related topics

[Least Cost Routing dialog](#)

[Least Cost Routing](#)



## Least Cost Routing of faxes

---

Provides configuration options for Zetafax's **Least Cost Routing** facility.

- To display this dialog, double-click **Least Cost Routing options** in **Server settings** , or select the **LCR** icon from the **Zetafax - configuration options** dialog.

### LCR Enabled

Select this to enable LCR. When the Zetafax server is restarted LCR will be turned on.

[Dialing properties](#) must be configured and enabled before LCR can be enabled.

This option must be selected to change any of the LCR settings.

### LCR Disabled

Disables LCR. When the Zetafax server is restarted LCR will not be run.

### General settings

Displays the [General settings](#) dialog to configure your Zetafax server for the LCR network.

### Links

Displays the [Links](#) dialog to set up links to other Zetafax servers on the LCR network.

### Destinations

Displays the [Destinations](#) dialog to get information about the destinations of your faxes.

### Rules

Displays the [Routing rules](#) dialog to set up rules to determine how each fax is routed over the network.

It is important that you proceed through the setup in the order listed here. The final stage of setting up rules for routing faxes requires that some links to remote servers have been set up, and that some categories for fax destinations have already been defined. If changes are made to fax destinations and properties of links to remote servers after routing rules have been set up, it may be necessary to adjust the routing rules again.

Routing strategy across a network can also be controlled centrally; see [Configuring LCR for more than one site](#).

If you use the scrolling icons on the left to move to another **Category**, any changes made to the LCR options are saved.

### Related topics

[LCR Troubleshooting](#)

[LCR - General settings](#)

[LCR - Links](#)

[LCR - Destinations](#)

[LCR - Rules](#)

[LCR - Edit Link](#)

[Configuring LCR for more than one site](#)

[Least Cost Routing](#)

[Server settings](#)



## Letterhead file

A letterhead is a graphics file that is used as a background for a fax.

The letterhead is stored in a multi-page TIFF FAX format file, with a version for fine (with extension .G3F) mode faxing and optionally a version for normal (with extension .G3N) mode faxing. Letterhead files are stored in the C:\Program Files\Zetafax Server\SYSTEM\ZLETTER directory.

Use a word processor to prepare your letterhead, then set up the Zetafax printer in High resolution mode and print. In the addressing dialog, click the Save as... button and save the .G3F file in the C:\Program Files\Zetafax Server\SYSTEM\ZLETTER directory.

The number of pages used depends on the way you want faxes headed. If only one page exists in the letterhead file, it will be used for every page of a fax to be sent. If there are two pages, the first will be used for the first page of the fax (normally letterhead), and the second for the second and subsequent pages (usually continuation stationary).

Irrespective of the number of pages in the letterhead file, each will be used in order only once, then any additional pages of the fax will be merged onto the last page of the letterhead file. If you want only the first page to have a letterhead, and all other pages to be blank, then you should produce a two-page letterhead file with a blank second page.

If your letterhead is not in computer readable form (i.e. is on paper), and you do not have access to scanner, the simplest method to create the letterhead file is to send the letterhead from another fax machine (effectively using the other fax as a scanner). You should send the letterhead (one or two pages - as described above), with the fax machine set to FINE mode. The file can then be copied from the IN window on the Zetafax Client to the Z-LETTER directory using the **File |Save** menu option. See [Faxing a cover sheet, letterhead, or attachment](#) for further details.

### Related topics

[cover sheets, letterheads, and attachment files](#)

[Add new letterhead](#)

[Using letterheads](#)



## Letterheads

---

Contains letterheads for use in outgoing messages, installed in the **Zetafax Configuration** program to aid editing and management.

While this folder is selected in the left pane, the **Action** and **Right-click** menus provide commands that work on this folder.

The right pane shows the letterheads within this folder, with the following columns of information:

### Description of the letterhead

A description of the letterhead used to aid identification in Zetafax displays.

### Letterhead

The name of the letterhead, used to select it in Zetafax displays.

While a letterhead is selected in the right pane, the **Action** and **Right-click** menus provide commands that work on this letterhead.

### Exporting the letterheads list

On the **Action** menu, or when you right-click, use the **Export list...** command to export the list of installed letterheads to a tab delimited text file or a comma delimited CSV file. The exported list includes a name and description for each letterhead.

### Related topics

[Add new letterhead](#)  
[cover sheets, letterheads, and attachment files](#)





## Item commands menu

---

Provides commands that work on the selected letterhead.



## License and Registration Wizard - Contact Details

---

The **Contact Details** dialog displays information about the licensed company such as address, fax number and contact.

To display this dialog, click **Next>** in the [Software Assurance](#) dialog.

### Contact name or department

This is generally the name of the Zetafax system administrator.

### Organization

This is the company name that was entered using the Zetafax [License organization details](#) dialog.

### Address

The address of the company.

### Post code/ZIP

The post-code/ZIP of the company.

### Country

The country you wish to register from. This will automatically choose which fax numbers you can automatically register with. It also determines your telephone and fax prefix codes, although these can be manually changed if necessary.

### Phone

This is the phone number for the contact name.

### Fax

This is the fax number for the contact.

### Email address

This is the email address of the contact.

### Purchased from

The name of the company Zetafax was purchased from.

**Note:** Fields with marked with an \* must be completed.

### <Back

Take the user back to the previous screen in the registration wizard, the **Software Assurance** dialog.

### Next>

Confirm details and take user to the next screen of the registration wizard, the [Registration Center](#). Cancel Close the dialog and return to the **Zetafax Configuration** program.

### Related topics

[Installing the Zetafax Server](#)  
[License organization details](#)



## License organization details

---

- Please enter your company or organization name and a contact name or department. These details are needed for the successful registration of the software. Click **OK** to continue.

**Important:** Ensure your **Organization** name is correct - you cannot change this later without reinstalling the software. This field is compulsory. Next, confirm that the organization details are correct.

### Related topics

[Installing the Zetafax Server](#)  
[License organization details](#)



## Lotus Notes import service

---

This dialog allows you to create a list of users of Notes in order to be able to set up email addresses for Zetafax users who are email enabled.

### Server Name

Enter the full server name followed by the Notes domain name. For example, Notes Server/Equisys Limited.

### Main email domain name

This field may be left blank if you intend to import from the global address book. If you want to import from a local address book, you should enter the name of the foreign domain that has been created in the Notes server for routing fax messages. Normally, the name of this domain will be FAX.

### Name of the gateway mail file

When you use the Notes administrator to set up a foreign domain, you associate a file with this domain, and this name should be entered here. Normally, the name of this domain will be FAX.NSF.

### Address book import type

This option allows you to select either the global or local address book in Notes.

### Related topics

[Email Gateway settings](#)

[Email Gateway enabled](#)

[Email gateway Installing the Zetafax email gateway](#)

[Setting up email gateway users](#)



## Lotus Notes Setup Service

---

This dialog allows you to configure the gateway for Lotus Notes.

### Server Name:

Enter the full server name followed by the Notes domain name. For example, Notes Server/Equisys Limited.

### Foreign Domain name:

In order to use Notes, you must use the Notes administrator to set up a foreign domain that will act as the connector to the gateway. Normally, the name of this domain will be FAX.

### Name of the gateway mail file

When you use the Notes administrator to set up a foreign domain, you associate a file with this domain, and this name should be entered here. Normally, the name of this domain will be FAX.NSF.

### Test connection

Choose this option to test the connection to Notes. The gateway will not be configured until this connection is made.

### Cover page

When sending a fax message from an email client, the normal Zetafax cover sheets are available. These are attached to the message when it is passed to the Zetafax server. Choose the cover sheet you require from this list, or if you do not wish to send a cover sheet.

#### Cover page: always

Choose this option if you wish all users to use the cover sheet you have selected from the list.

#### Cover page: default

Choose this option if you wish each user to be able to use his own default cover sheet. A Zetafax user may select his default cover sheet by running the Zetafax workstation.

#### Omit cover page if no text

If this option is selected, attachment-only messages will not include a cover sheet, even though a cover sheet has been selected.

#### Return sent files after transmission

If this option is selected, when the gateway sends a response message to the email client that indicates the success or failure of the fax, all attachment files will be included in the response. If this option is not selected, the attachment files are only included if the message has been rejected by Zetafax.

### Related topics

[Email Gateway settings](#)

[Email Gateway enabled](#)

[Email gateway Installing the Zetafax email gateway](#)

[Setting up email gateway users](#)



## Email Gateway

Provides configuration options for the Email Gateway, allowing sending and receiving of fax messages by email.

You can display this dialog in two ways: Select **Email Gateway** in **Server settings** and click the **Action** menu, or right-click, and select **Edit**. Select the **Email** icon from the **Zetafax - configuration options** dialog. Email Gateway

When **Enabled** is selected, the Email gateway is enabled and the dialog options change: see [Email Gateway enabled](#) for more information.

### Email type

Allows the user to select the type of email system which they are using. If Microsoft Exchange is selected, then the Exchange profile is automatically selected. If **(disabled)** is selected then all of the other fields are reset, until a new email type is chosen.

### Email user account or profile

Set up the user account name or profile if Microsoft Exchange is selected. An account name must be provided in this field before exiting the dialog, unless the Email type is **(disabled)**.

### Password

Set up the password for the user account. If already set, a number of asterisks are displayed. These must all be deleted before typing a new password. Stay logged in while server running (more efficient)

Check this box to specify whether or not to stay logged in to email whilst the Zetafax server is running. It is recommended that this option is selected for efficiency reasons.

### Test

Click this button to test if the account name and password provided can be used to connect to the email facility. It is advised that you do not attempt this whilst the Zetafax server is running, as it may stop received faxes being forwarded.

### OK

Save any changes that have been made to the **Email gateway** configuration, and exit the **Zetafax - configuration options** dialog.

### Cancel

Do not save changes made to the **Email gateway** configuration, and exit the **Zetafax - configuration options** dialog.

### Reset

Reset the **Email gateway** configuration to its default settings. The settings are not saved until either **OK** is clicked or another category icon is selected from the scroll (left).

If you use the scrolling icons on the left to move to another **Category**, any changes made to the **Email gateway** configuration are saved.

### Related topics

[Email Gateway](#)

[Email Gateway enabled](#)

[Email Gateway Properties](#)

[Email Gateway Services Configuration](#)  
[Email Gateway Properties - Applications](#)  
[Email Gateway Properties - Rendering](#)  
[Setting up Email Gateway users](#)  
[Server settings](#)





## Email Gateway enabled

This dialog allows the user to enable and configure the Zetafax Email Gateway. This section of the dialog appears if you have selected Email gateway **Enabled** and allows you to configure the gateway. This should be done before configuring users who wish to use the Gateway.

### Email Gateway

Select **Disable** to disable the Email Gateway. The options in the lower part of the dialog change so that users can still have incoming messages forwarded to their email account via MAPI. See [Email gateway](#) for more information.

### Add Email...

This allows you to choose the email system with which the Email Gateway communicates. It displays the **Services Installation** dialog.

### Configure...

This button leads you through a sequence of operations: **Services Configuration** dialog. This allows you to configure the email system that you have chosen. Creation of a list of email users. This option allows you to create a list of users of the email systems that you have configured. It is used by Zetafax when configuring users so that they are enabled to use the gateway.

### Rendering...

This allows you to configure the rendering of attachment files by the gateway. It consists of a tabbed dialog with tabs that define Application Configuration and Rendering Configuration.

### OK

Save any changes that have been made to the **Email gateway** configuration, and exit the Zetafax - configuration options dialog.

### Cancel

Do not save changes made to the **Email gateway** configuration, and exit the Zetafax - configuration options dialog.

### Reset

Reset the **Email gateway** configuration to its default settings. The settings are not saved until either **OK** is clicked or another category icon is selected from the scroll (left).

If you use the scrolling icons on the left to move to another **Category**, any changes made to the **Email gateway** configuration are saved.

### Related topics

[Configure associations](#)

[Setting up Email Gateway users](#)

[Server settings](#)



## Email user profiles

---

Contains the email user profiles.

While this folder is selected in the left pane, the **Action** and **Right-click** menus provide commands that work on this folder.

The right pane shows the profiles within this folder, with the following columns of information:

### Email user profile

The name that has been given to the profile.

### Description

The description you have given to the profile.

While a profile is selected in the right pane, the **Action** and **Right-click** menus provide commands that work on this profile.

### Related topics

[Zetafax users](#)

[Add new Zetafax email user profile](#)

[Email profile accounts](#)



## Microsoft Exchange import service

This dialog allows you to create a list of users of Exchange in order to be able to set up email addresses for Zetafax users who are email enabled. If you are unsure which organization and site names you have used when you configured Exchange, they can be found by running the Microsoft Exchange administrator program.

You may not use this option if you are running this program on a computer that is not the Exchange Server PC - you should use the MAPIEXP program to do this.

By default, only users in the **Recipients** container are listed. If you wish to list users in a sub-container, you should add the container name to the site name - for example:

sitename/CN=container name

### Organization name

Enter the name of the organization that you used when setting up your Exchange server.

### Site name

Enter the name of the site that you used when setting up your Exchange server.

### Related topics

[Email Gateway settings](#)

[Email Gateway enabled](#)

[Email gateway Installing the Zetafax email gateway](#)

[Setting up email gateway users](#)



## Microsoft Exchange Setup Service

---

This dialog allows you to configure the gateway for Microsoft Exchange. It is necessary that both the Microsoft Exchange Server and the Zetafax Exchange Connector services have been installed and are running. The Connector installation directory should be marked as a shared directory, and mapped onto one of your logical drives.

### Exchange Connector Path:

Enter the full path name of the Exchange Connector. This should be a full UNC path name if Exchange is installed on another computer on the network.

### Connector address type name:

This must be set to **FAX**.

### Test connection

Choose this option to test the connection to Exchange. The gateway will not be configured until this connection is made.

### Cover page

When sending a fax message from an email client, the normal Zetafax cover sheets are available. These are attached to the message when it is passed to the Zetafax server. Choose the cover sheet you require from this list, or if you do not wish to send a cover sheet.

#### Cover page: always

Choose this option if you wish all users to use the cover sheet you have selected from the list.

#### Cover page: default

Choose this option if you wish each user to be able to use his/her own default cover sheet. A Zetafax user may select his/her default cover sheet by running the Zetafax workstation.

#### Omit cover page if no text

If this option is selected, attachment-only messages will not include a cover sheet, even though a cover sheet has been selected.

### Return sent files after transmission

If this option is selected, when the gateway sends a response message to the email client that indicates the success or failure of the fax, all attachment files will be included in the response. If this option is not selected, the attachment files are only included if the message has been rejected by Zetafax.

### Related topics

[Email Gateway settings](#)

[Email Gateway enabled](#)

[Email gateway Installing the Zetafax email gateway](#)

[Setting up email gateway users](#)



## Off peak time definition

Provides configuration options for the definition of 'off peak time', so that users can select to send a fax at off peak time, or be prohibited from sending at any other time.

- To display this dialog, double-click **Off peak time definition** in **Server settings** , or select the **Off peak times** icon from the **Zetafax - configuration options** dialog.

### All day

Specify the days that are considered to be off peak all day (e.g. weekends).

### Mon, Tue, Wed, Thurs, Fri, Sat, Sun

Selecting a check box makes the whole day off peak.

### Other days (24 hour clock)

The **From** and **To** times set the off peak time between the two times specified, for the remainder of the days.

For example, if the **From** time is set to 18:00, and the **To** time to 20:00, off peak time is between 6pm and 10pm. If the **From** time is set to 18:00, and the **To** time is set for 06:00, off peak time is from 6pm to 6am the next day.

### From

Specify the off peak from time, using the 24 hour clock. Valid range 00:00 to 23:59

### To

Specify the off peak until time, using the 24 hour clock. Valid range 00:00 to 24:00

### OK

Save any changes that have been made to the off peak time definition, and exit the Zetafax - configuration options dialog.

### Cancel

Do not save changes made to the off peak time definition, and exit the Zetafax - configuration options dialog.

### Reset

Reset the off peak times definition to its default settings. The settings are not saved until either **OK** is clicked or another category icon is selected from the scroll (left).

If you use the scrolling icons on the left to move to another **Category** , any changes made to the off peak time definition are saved.

### Related topics

[Zetafax Configuration](#)

[Server settings](#)



## Options commands

---

The following commands are available on all Zetafax configurations.

### To

#### Syntax

```
%%[To: fax, recipientname, organisation]
```

where fax is the fax number to send the fax to, recipientname is the person the fax is addressed to, and organisation is that person's company or organisation; fax, recipientname, and organisation may each appear in double quotation marks if required.

#### Description

Specifies the fax number to use and the details of the recipient which are put on the fax cover sheet and at the top of each page of the fax.

#### Example

```
%%[To: 123 456 7890, Sam Smith, Smith and Sons]
```

### Fax

#### Syntax

```
%%[Fax: fax]
```

where fax is the fax number to send the fax to.

#### Description

A subset of and alternative to the %%[To:] command above.

#### Example

```
%%[Fax: 123 456 7890]
```

### Name

#### Syntax

```
%%[Name: recipientname]
```

where recipientname is the person the fax is addressed to.

#### Description

A subset of and alternative to the %%[To:] command above; used with the %%[Fax] command.

#### Example

```
%%[Name: Sam Smith]
```

### Organisation

#### Syntax

```
%%[Organisation: organization]
```

where organisation is the recipient's company or organisation.

#### Description

A subset of and alternative to the %%[To:] command above; used with the %%[Fax] command.

**Example**

```
%%[Organisation: Smith and Sons]
```

**Send****Syntax**

```
%%[SEND]
```

**Description**

Indicates that the document being printed should be split at the foot of this page and submitted as a fax. The remaining page or pages will be treated as a separate fax or faxes.

**Example**

```
%%[Send]
```

The remaining options commands are only available if the API toolkit is licensed:

**From****Syntax**

```
%%[FROM: sendername]
```

where sendername is the originator of the fax - it may appear in double quotation marks.

**Description**

Specifies the name which is put on the fax cover sheet as the sender of the fax (cf the From: field on the Zetafax addressing dialog box).

**Example**

```
%%[From: Jim Jones]
```

**cover sheet****Syntax**

```
%%[cover sheet: cover sheet]
```

where cover sheet is the name of the file to be used to generate a cover sheet for the fax (1 to 8 characters long) or blank for no cover sheet - cover sheet may appear in double quotation marks.

**Description**

Specifies what cover sheet to generate for the fax onto before sending.

**Example**

```
%%[cover sheet: COVSHEET]
```

**Letterhead****Syntax**

```
%%[LETTERHEAD: letterhead]
```

where letterhead is the name of the file to be used as the letterhead (1 to 8 characters long) or blank for no letterhead - letterhead may appear in double quotation marks.

**Description**

Specifies what letterhead to merge the fax onto before sending.

**Example**

```
%%[Letterhead: LETTHEAD]
```

**Quality**

**Syntax**

%%[QUALITY: quality]

where quality is one of DRAFT, NORMAL or HIGH.

**Description**

Specifies the resolution to be used when sending the fax, in the same way as the Resolution button on the Zetafax client sending options dialog box. For fax, DRAFT and HIGH will normally force the fax to be sent at standard (200x100 dpi) and fine (200x200 dpi) resolutions respectively, whilst NORMAL will send at whichever resolution has been specified by the system administrator in the system initialization file.

**Example**

%%[Quality: NORMAL]

**Priority****Syntax**

%%[PRIORITY: priority]

where priority is one of URGENT, NORMAL or BACKGROUND.

**Description**

Specifies the priority to be used when queuing the fax, in the same way as the Priority radio button on the Zetafax client sending options dialog box.

**Example**

%%[Priority: NORMAL]

**Time****Syntax**

%%[AFTER: time] or %%[TIME: time]

where time specifies the earliest time that the message should be sent, for deferred sending. The format of the time field may be one of the following: hh:mm:ss (given time today) yy-mm-dd hh:mm:ss (date and time specified) OFFPEAK (as defined in SETUP.INI) If the time field is omitted the message is queued for sending immediately.

**Description**

Specifies when the message is to be sent.

**Example**

%%[After: 99-03-01 18:00:00]

**Header****Syntax**

%%[HEADER: header] where header is one or more of No, To, Fr, Da and Ti.

**Description**

Specifies the header to appear at the top of each page of the fax, in the same way as the Header radio button on the Zetafax client sending options dialog box. No page numbering (n/N) To name of recipient Fr name of sender Da date Ti time

**Example**

%%[Header: NoToFrDa]

**Attach****Syntax**

%%[ATTACH: files]



where files is a comma separated list of graphics files to attach to the fax.

**Description**

Specifies the attachment files in the user's private graphics directory (Z-GRAPH) or in the system graphics directory, in the same way as the Attach radio button on the Zetafax client sending options dialog box.

**Example**

%%[Attach: INFOPACK, PRICES]

**Charge****Syntax**

%%[CHARGE: charge code] where charge code is the charge code to be used for the fax

**Description**

Specifies the charge code to be used when queuing the fax, in the same way as the Charge combo box on the Zetafax client addressing dialog box.

**Example**

%%[Charge: SALES]

**Discard****Syntax**

%%[DISCARD]

**Description**

Specifies that this page will not be faxed. This command allows you to put all the embedded addressing commands on to one page and not have to worry about upsetting the formatting of the actual fax. Please note that this is not be available on Windows 95/98.

**Example**

%%[Discard]

**Subject****Syntax**

%%[SUBJECT: subject line]

where subject line is the subject of the fax.

**Description**

Specifies the subject field for the fax which can appear on the cover sheet.

**Example**

%%[Subject: About the new sales figures]

**Note****Syntax**

%%[NOTE: note text]

where note text is the text to appear in the cover sheet note field.

**Description**

Specifies the note field text that can appear on the cover sheet.

**Example**

%%[Note: Please find attached the price list]

**Delete****Syntax**

%%[DELETE: delete] where delete is YES, OK or NO.

#### Description

Specifies whether the fax should be deleted after sending. If delete is YES then the faxes are deleted after they have been sent (successful or failed). If delete is OK then the faxes are deleted after they have been sent successfully. If delete is NO then the faxes are **not** deleted after they have been sent (a blank line is equivalent).

#### Example

%%[Delete: YES]



## Phone number category rules

This dialog allows the Zetafax telephone number type rules to be set up. Zetafax will look at the telephone number of a fax and decide, from these rules, whether the call is local, national or international. Zetafax user accounts can specify the telephone number types which may be sent to, allowing specific users to be prohibited from making international calls, or calls to certain countries. See [User send time restrictions](#) for information on specifying allowed number types in individual user accounts.

- To display this dialog, double-click **Phone number category rules** in **Server settings**, or select the **Number types** icon from the **Zetafax - configuration options** dialog.

An example of a set of rules which might be used in London are as follows: 020 7...Local 020 8...Local 00...International (1) 0...National (1) x... Local ...Local

Up to 30 rules may be defined as required. The rules are evaluated by the system from top to bottom. Thus in the above example, if the number being called starts with "020 7" or "020 8" it is a local call, if it starts with "00" it is international. Any other number starting with 0 is national, while any internal extension ("x") calls, and indeed all other calls ("") are classified as local.

### Rules list

This displays a list of rules, containing the phone number categories currently configured. The start of the phone number (left) and the category name (right) are displayed. Click on an entry, and its details are entered into the **Start of number** and **Category** boxes. Here, the details can be modified, and either saved to the same rules entry by clicking the **Modify** button or to a new entry by clicking the **Add** button.

### Start of number

The start of number is matched against the first few characters of the addressee phone number - the addressee phone number is of the given type if the first characters (ignoring non alphanumeric characters) match.

### Category

The category is one of the following: "Local", " National (1)" to " National (9)", " International (1)" to " International (9)". Hence, there are 19 categories available.

### Modify

Click this button to save the details in the **Start of number** and **Category** boxes to the currently selected rule (as highlighted in the **Rules list** ).

### Add

Click this button to save the details in the **Start of number** and **Category** boxes to a new entry in the **Rules list** . The new rule is inserted before the currently selected item in the list.

### Remove

Remove the currently selected item from the **Rules list**.

### OK

Save any changes that have been made to the phone number category rules, and exit the Zetafax - configuration options dialog.

### Cancel

Do not save changes made to the phone number category rules, and exit the Zetafax - configuration options dialog.

### Reset

Reset the phone number category rules to their default settings. The settings are not saved until either **OK** is clicked or another category icon is selected from the scroll (left).

If you use the scrolling icons on the left to move to another **Category** , any changes made to the phone number category rules are saved.

**Related topics**[Zetafax Configuration](#)[Server settings](#)



## Queuing and retry parameters

Provides configuration options for the queuing and retrying of outgoing messages. To display this dialog, double-click **Queuing and retry parameters** in **Server settings**, or select the **Queuing** icon from the **Zetafax - configuration options** dialog.

### Send "Normal" quality faxes at fine resolution

Select this option to specify that fax messages submitted with resolution set to "Normal", are sent in fine fax mode (200x200 dpi resolution), rather than standard fax mode (100x200 dpi).

### Fail all queued messages if all fax devices fail

If this box is checked, devices that have failed are removed from the list of available devices, and any messages waiting for that device (or subsequently queued for that device) are also set to failed. When the device controller gets no response from a device the device status is changed to `DEVICE_ERROR`. It continues checking the device, but if no response has been received after a given time (typically 15 minutes or more) the device status will be changed to `DEVICE_FAILED`.

If this option is unchecked, [QUEUEMAN](#) will leave messages queued for that device in the queue (and allow new messages to be queued for it), waiting indefinitely for the device to recover (or be deleted by the system administrator).

Checking this option causes these messages to be failed (with error code "No suitable devices available").

### Retry if voice answered call

This option is selected as standard, and allows retry attempts to be made if a person answers a number. By deselecting this option, if a voice is detected answering a fax number, this fax will fail immediately with no retry attempts.

### Number of attempts to dial busy or unanswered fax numbers

Specify the maximum number of times Zetafax will submit a fax to a device for sending before marking it as failed. For an incorrect fax number this will be the maximum number of dial attempts.

**Note:** The device controller may make additional (intermediate) redial attempts if the fax fails part way through sending (see Action if transmission interrupted for more details). Delay before redialing busy or unanswered fax numbers

Specify the minimum time (in seconds) for which [QUEUEMAN](#) will wait before re-submitting a message to a device for sending after a connection error (e.g. number engaged). Timers are kept independently for each recipient of each message, and do not affect the processing of other messages in the queue.

### OK

Save any changes that have been made to the queuing and retry parameters, and exit the Zetafax - configuration options dialog.

### Cancel

Do not save changes made to the queuing and retry parameters, and exit the Zetafax - configuration options dialog.

### Reset

Reset the queuing and retry parameters to their default settings. The settings are not saved until either **OK** is clicked or another category icon is selected from the scroll (left).

If you use the scrolling icons on the left to move to another **Category**, any changes made to the queuing and retry parameters are saved.

### Related topics

[Zetafax Configuration](#)  
[Server settings](#)



## Reinstalling the Mail Rendering Subsystem driver

Verify that you are able to send text messages O.K through the e-mail gateway before continuing and then check the following.

- The version number of Zetafax as reported by the workstation.
- Is Zetafax running as a service? If it is running as a service and it will not render attachments.

THEN

- Stop the Zetafax service.
- Start the Zetafax program as an application.

Now check to see if the e-mail gateway will render attachments.

**If Zetafax will still not render attachments check the following.**

- Is the Mail rendering subsystem (MRS) set as the default printer? (Pre 6.00b)
- What version of the application is installed on the Server, make sure that this application is installed under the rendering option of the e-mail gateway.

**If Zetafax still does not render...**

THEN

- Open a word document in WORD and print it to the Mail Rendering Subsystem printer (MRS)
- Check to see what is written to the zfax\MAIL\ST subdirectory, where 'zfax' is the name of the directory where the Zetafax server files are installed.

If a \*.TIF file is written to the ST directory file. Try and open the file with Imaging and see if the file opens O.K.

If the file does not open O.K record and error messages reported.

- Rename the file to a .g3f extension and try and open the file with the Zetafax viewer.

If you are not able to open the file O.K. and if it does not look like a fax of the document that you printed...

THEN

Open the document in word and this time print it to the Zetafax Printer... check to see that it prints O.K to the Zetafax Printer.

IF it does not print O.K to the Zetafax printer

THEN

You will need to re-install the Zetafax workstation on the Zetafax Server.

**To re-install the Zetafax Workstation on the Zetafax Server**

1. Make sure that the Zetafax server service is set to manual and that the service is stopped.
2. Run the workstation setup and choose the uninstall option.
3. Go to start menu / printers and delete MRS and Zetafax Printers if they are still there.

### USE CAUTION WHEN EDITING THE REGISTRY AS IT MAY LEAVE YOUR SYSTEM UNSTABLE

4. Run regedt32 and delete any keys that have references to Zetafax Printer and Mail Rendering Subsystem from the PRINTERS and MONITORS section.

This will normally be in

HKEY\_LOCAL\_MACHINE/SYSTEM/CurrentControlSet/Control/Print/Monitor

AND

HKEY\_LOCAL\_MACHINE/SYSTEM/CurrentControlSet/Control/Print/Printers

5. Now go to the WINNT directory and find the following files (THESE are the files that relate to NT4.0)

img32mfx.dll  
img32mm.dll  
imgfaxdr.dll  
imgfaxmn.dll  
imgfb4mn.dll  
imgfb4ui.dll  
imgfaxui.dll  
imgfax.hlp

6. Delete all occurrences of these files that appear in the \WINNT directory and \System32 subdirectory or any subdirectories of \system32. DO NOT delete any other files whose filenames begin with img, as these are part of the OS
7. RESTART the Zetafax server machine.
8. Reinstall the Zetafax Workstation - make sure that the Zetafax server is stopped and NOT running before you do this.
9. Run the Zetafax configuration program and reinstall the Mail Rendering Subsystem by clicking on the rendering Tab.
10. Verify that there are now three printers showing in the printer's section.
11. Restart the Zetafax server as an application and try and send an attachment from your e-mail client.



## Select printer

---

Choose the printer that Zetafax will use for Automatic printing.

**Please note:** You will need to choose a printer that is available from the server on which Zetafax is running. Printer to use

Use the drop-down list to select the printer that Zetafax will use.

### Paper size

The drop-down list displays the available paper sizes for the selected printer. Choose either the default paper size or choose a specific paper size to be used for printing the faxes on.

### Paper source

The drop-down list displays the available paper sources for the selected printer. Choose either the default paper source or choose a specific paper source to be used for printing the faxes on.

### Advanced

Click this button if you wish to select different settings or a second printer for faxes that are not standard sizes e.g. faxes that contain legal pages.

### Related topics

[Automatic printing](#)

[Advanced Printer Settings](#)

[Automatic printing of received faxes](#)

[Automatic printing of sent faxes](#)





## Sending a fax

In order to send a fax you need to tell Zetafax what it is that you want to send. There are four ways of doing this.

### Using the client program

This option is most convenient when the source is a file. A number of general file formats may be sent directly, including ASCII, DCX, EPS, bitmaps, Epson FX and LQ series, GIF, JPEG, PCX, PICT, Targa, TIFF, Windows metafile bitmaps, and WordPerfect metafile bitmaps. To send a file which is in the correct format you just select it on the main Zetafax window and click **Send...** (**File** menu). Alternatively you can drag the file from the Windows Explorer and drop it onto Zetafax.

### Using the fax printer

This option is most convenient when the source is a document open in an application program, such as a word processor or spreadsheet. To send the document, you use the applications Print facility to 'print' it to the Zetafax fax printer. If the client program is already running, it will then prompt for details of whom to send the fax to. If the program is not running then it will normally be started up automatically, or you will be prompted for the addressing details when you next run it.

### Using e mail

This option is most convenient when the source is an email message. If you have the Zetafax email gateway option installed, you send the email to a fax recipient which is passed to the Zetafax server for faxing onwards. Any attachments such as word processor files will be converted to graphics at the Zetafax server prior to faxing. This saves tying up clients preparing graphics attachments, but means that if you attach a document file, the application that created it must be installed on the Zetafax server PC (along with any fonts used in the document). The Zetafax email gateway is described in detail in the [Email gateway](#) topic.

### Faxing direct from Microsoft Office

Zetafax provides 'add-ins' for Microsoft Word, Excel, and PowerPoint that install a Zetafax toolbar button in each program. The Zetafax toolbar button provides a convenient way of faxing a document from each program at a single click.



## Server settings options for sending ASCII text files as messages

---

You can set up Zetafax to send ASCII text files as messages in the **Server settings** options of the Zetafax Configuration program. These options are used if a text file is sent directly using the Zetafax Client **File Send** option, rather than printed from a word processor (using the Zetafax printer driver).

- To display this dialog, double-click **Sending ASCII text files** in **Server settings** , or select the **Text files** icon from the **Zetafax - configuration options** dialog.

### Top margin

Range 0-15 lines.

Specifies the number of blank text lines at the top of the fax page when preparing an ASCII text file for sending.

### Bottom margin

Range 0-15 lines.

Specifies the number of blank text lines at the bottom of the fax page when preparing an ASCII text file for sending.

### Page length

Range 35-100 lines.

Specifies the number of text lines per page (including the top and bottom margins) when preparing an ASCII text file for sending. A value of 72 gives approximately an A4 page.

### OK

Save any changes that have been made to the ASCII text files configuration, and exit the Zetafax - configuration options dialog.

### Cancel

Do not save changes made to the ASCII text files configuration, and exit the Zetafax - configuration options dialog.

### Reset

Reset the ASCII text files configuration to its default settings. The settings are not saved until either **OK** is clicked or another category icon is selected from the scroll (left).

If you use the scrolling icons on the left to move to another **Category** , any changes made to the ASCII text files configuration are saved.

### Related topic

[Server settings](#)



## Sending SMS messages

The Zetafax server is capable of submitting Short Message Service (SMS) or text messages to mobile devices using the commands specified below. SMS messages are submitted via an SMS center before being delivered to the mobile device.

SMS messages are limited to 160 characters per short message. Longer messages can be sent using Zetafax, the Zetafax server handles longer SMS messages by breaking one long message into several smaller messages.

Preferences for handling longer messages can be modified in the **Zetafax Configuration** program under the **Devices** note for each SMS device you have configured.

### Message commands

SMS messages can handle message text only, and cannot be used to send graphics files or other file formats. As a result, several Message Option and Message Text commands that can be used to create fax messages are not relevant when sending SMS messages.

The following is a list of Message Option commands that are supported when sending SMS messages. For a detailed description of each command, refer to the API help file.

### Command Description

After	Specifies the earliest time that the message should be sent.
Charge	Specifies a charge code to use for a message.
Comment	Specifies the message description.
Delete	Specifies whether the Zetafax server should delete the message from the OUT directory after it has completed.
Format	Specifies what format the data file is in.
Hold	Specifies whether the message will be held once it in the queue, meaning that it will not be sent until the user releases it.
Priority	Specifies the priority to be used when queuing the message.
Subject	Specifies the message subject, as displayed in the client OUT window.
User	Specifies the Zetafax user submitting this file.

The following Message Option commands are not applicable and are therefore not supported when sending SMS messages using ZSUBMIT: ATTACH, cover sheet, COVERTEXT, FAX, FIELD, FROM, HEADER, LAN, LETTERHEAD, ORGANISATION, PREVIEW, QUALITY.

The following Message Text commands are not supported when submitting SMS messages using ZSUBMIT:

```
%%[APPEND]
%%[BOLD]
%%[DOWN]
%%[FONT]
%%[INSERT]
%%[LANDSCAPE]
%%[LMARGIN]
%%[PAGE]
%%[PORTRAIT]
%%[RIGHT]
%%[UNDERLINE]
```



## Server Configuration Wizard

---

The Server Configuration Wizard runs four other wizards:

- Licence and Registration Wizard
- Share Zetafax Folder Wizard
- Add User Wizard
- Device Configuration Wizard

The Server Configuration Wizard is started the first time the Zetafax Configuration program is run. It helps with the initial setup of your Zetafax Server.

### **Related topics**

[License and Registration Wizard](#)

[Share Wizard](#)

[User Wizard](#)

[Device Configuration Wizard](#)



## Server settings

Provides dialogs that control the configuration of a specific area of functionality of the Zetafax server programs. Double-click an option in **Server settings** to display the **Zetafax - configuration dialog**.

- You can control settings in the following categories:

### Email gateway

Setting email options for sending received faxes directly to a users email account. See [Email gateway settings](#) for options with the Zetafax email gateway disabled, or see [Email gateway enabled](#) for options when it is enabled.

### Archiving of messages received or sent

Allows a copy of any files sent or received to be stored. See [Archiving options](#).

### Automatic printing of sent faxes

Allows a hard copy of all sent faxes to be automatically produced for your records. See [Print - sent options](#).

### Automatic printing of received faxes

Allows a hard copy of all received faxes to be automatically produced for your records. See [Print - recd options](#).

### Zetafax server remote administration

Settings allowing you to control the level of access permitted by remote administrative machines. See [Zetafax server remote administration](#).

### General configuration options

Provides general configuration options for the Zetafax Server. See [General options](#).

### Phone number category rules

Allows the Zetafax telephone number type rules to be set up. See [Phone number category rules](#).

### Off peak time definition

Allows you to set the time period when off peak call charges apply. See [Off peak time definition](#).

### Sending ASCII text files

These options are used if a text file is sent directly using the Zetafax Client **File Send** option, rather than printed from a word processor (using the Zetafax printer driver). See [Text files options](#).

### Queuing and retry parameters

Queuing faxes waiting to be sent. See [Queuing and retry parameters options](#).

### ZSUBMIT automatic file submission program

Provides configuration options for the ZSUBMIT program used by Zetafax API programs to automatically submit messages for sending. See [Auto submit options](#).

### HPSCAN direct scan-to-fax program

Provides configuration options for the HPSCAN program supplied with the HP Network ScanJet 5 and HP Digital Sender devices. See [HP scanner options](#).

### Least Cost Routing of faxes

Provides configuration options for Zetafax's **Least Cost Routing** facility. See [Least Cost Routing options](#).

### Telephone dialing properties

Provides configuration options for the number format for dialing out from this server, and to international destinations. See [Dialing Properties options](#).

**Enhanced Security settings**

Applying security. See [Enhanced Security settings](#).

**Share Zetafax Folders**

Create folder shares to enable Zetafax client access. See [Share Zetafax Folder Wizard](#).

**Automatic inward routing**

Zetafax can use a number of methods for delivering received faxes automatically to their intended recipient. These include giving each user their own fax number, or specifying that all faxes from a given company should be sent to a particular user. See [Routing options](#) for more information.

**Do Not Dial Control**

Sets up a list of numbers that all Zetafax users are prevented from sending faxes to. These can be specific numbers or partial numbers for example area codes.

**Junk Message Filter**

Allows you to change the way in which messages marked as 'Junk' are dealt with for all users.

**Conversion of sent and received messages**

Allows you to convert sent and received messages into different file formats, only available if the CommsEngine addon has been added. See [Conversion of sent and received messages](#)

If you use the scrolling icons on the left to move to another **Category** , any changes made in the previous category are saved.



## How to create a fax report

1. From the Zetafax Server program, select **Fax Reports....** from the **Options** menu.

A dialog box will be displayed that allows you to set various options for your fax:

The screenshot shows the 'Fax Report' dialog box with the following settings:

- Report type:**
  - Fax log file: files\zetaetafax server\server\z-db\fax.log
  - Report type: Standard
  - Report subtype: User
- Time and date range:**
  - ☒ Date: From 29/09/2005 To 05/10/2005
  - ☐ Time: From 07:00:00 To 09:00:00
- Filter by:**
  - ☒ No filtering (use all data)
  - ☐ Specify data: Field: User, Value: (empty)

Buttons at the bottom: OK, Cancel, Print Setup..., Help.

### Report type

1. Choose the location that you have stored your log file (the default location will be automatically displayed in the **Fax log file:** text box, but you can set this to a different location should you wish by using the browse option).
2. Choose the **Report type** you require:

#### Type of report

Standard

#### Information

A table reporting the following fields:  
 User - Person who sent the fax.  
 Date - Date the fax was sent.  
 Time - Time the fax was sent.  
 Recipient - Who the fax was sent to.

Summary	Organisation - What company the fax was sent to. Fax number - The number the fax was sent to. Duration - The duration of the fax transfer. User - Person who sent the fax. No. Faxes - Number of faxes sent. Duration - Time taken to send these faxes.
International	Number of pages - Number of pages sent. Graphical representation of number of faxes and pages sent per country and time taken to send to each country.
Detailed	Date - Date the fax was sent. Time - Time the fax was sent. User - Person who sent the fax. Recipient - Who the fax was sent to. Organisation - What company the fax was sent to. Type - Resolution and type of message sent. Fax number - The number the fax was sent to. Error code - Any recorded error codes. Pages sent - Number of pages sent. Duration (h:m:s) - The duration of the fax transfer. From - Name in From field. Charge code - Charge code used. Remote server - Name of remote server used. Country - Country fax sent to if international.
Average usage per hour	Graphical representation of the number of faxes sent on average each hour over a set period of time.
Average usage per Weekday	Graphical representation of the number of faxes sent on average each weekday over a set period of time.

3. If required, Select a **Report Subtype**, this allows you to create reports that are divided up using one of the following categories:

- Charge Code
- Country
- Recipient
- Remote Server
- User

## Time and Date Range

Using these options, you can set the Date and time ranges for your fax reports.

## Filter by

This option allows you refine your report by:

- Charge code.
- Country.
- Recipient.
- Remote server.
- Username.

1. Select the **Specify data** option.
2. Select what type of filter you wish to apply.
3. Add the data value you wish to filter by in the **Value** text box

Select the OK option to produce your report.

Your report will be displayed in the fax report viewer program.





## Set new Zetafax user defaults

Lets you enter the details that will be used as the default values for each new user, displaying the [Zetafax user details](#) dialog.

### Related topics

[Zetafax users](#)

[Zetafax user details](#)

[Inward routing rules](#)

[Setting up email gateway users](#)



## Share Zetafax Folder Wizard

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The Share Zetafax Folder Wizard helps you complete the following: Create folder shares for Zetafax server folders so that Zetafax clients can send and receive faxes. Update Active Directory with the shared folders so that Zetafax clients can locate the server on the network. Make the Zetafax client installation program (WKSETUP.EXE) available on the network.

The Share Wizard will run the first time you start the Zetafax Configuration program. It is also accessible from the Server Settings folder.

### **Related topics**

[Server Settings](#)

[Server Configuration Wizard](#)



## SMTP import service

---

This dialog allows you to import a list of SMTP users from a text file.

### Import file name

Enter the file that contains a list of SMTP users.

### Import domain name

Enter the domain name of your users, this is also used to generate the wildcard user accounts.

### Related topics

[Email Gateway settings](#)

[Email Gateway enabled](#)

[Email gateway Installing the Zetafax email gateway](#)

[Setting up email gateway users](#)



## SMTP Email Setup Service

---

This dialog allows you to configure the gateway for SMTP servers. It is necessary that both your corporate SMTP Server and the Zetafax SMTP Server are installed and are running. The Zetafax SMTP Server data directory should be marked as a shared directory.

### SMTP Mail path:

Enter the full path name to the data directory of the Zetafax SMTP Server. This should be a full UNC path name if the Zetafax SMTP Server is installed on another computer on the network.

### SMTP domain name:

This must be the company domain name.

### Test connection

Choose this option to test the connection to the Zetafax SMTP Server. The gateway will not be configured until this connection is made.

### Cover Page

When sending a fax message from an email client, the normal Zetafax cover sheets are available. These are attached to the message when it is passed to the Zetafax server. Choose the cover sheet you require from this list, or if you do not wish to send a cover sheet.

### Cover page: Always

Choose this option if you wish all users to use the cover sheet you have selected from the list. Cover page: Default

Choose this option if you wish each user to be able to use his/her own default cover sheet. A Zetafax user may select his/her default cover sheet by running the Zetafax Client.

### Omit cover page if no text

If this option is selected, attachment-only messages will not include a cover sheet, even though a cover sheet has been selected.

### Return sent files after transmission

If this option is selected, when the gateway sends a response message to the email client that indicates the success or failure of the fax, all attachment files will be included in the response. If this option is not selected, the attachment files are only included if the message has been rejected by Zetafax.

### Related topics

[Email Gateway settings](#)

[Email Gateway enabled](#)

[Email gateway Installing the Zetafax email gateway](#)

[Setting up email gateway users](#)



## License and Registration Wizard - Software Assurance

This dialog displays details of the Software Assurance Program. To display this dialog, click **Next>** in the [License Number](#) dialog.

Membership of the Zetafax Software Assurance Program protects your investment in Zetafax software. The Program automatically provides member customers with all software version upgrades and updates for one year from the date of the agreement.

For a one-off fee, all upgrades are supplied to Software Assurance Program holders, and information on new releases and updates is communicated as a priority.

The Software Assurance Program is available for all Zetafax systems from 5 users to 100 user systems and above. One year's Software Assurance is included as standard in certain countries with the Zetafax Business Edition and in all countries with the Zetafax Corporate Edition.

If the license fields are blank and you have purchased a license for software assurance, please enter the license number. Click **Next>** to display the [Contact details](#) dialog.

### Related topics

[Installing the Zetafax Server](#)

[License organization details](#)



## Telephone dialing properties

---

Provides configuration options for the number format for dialing out from this server, and to international destinations.

Dialing properties determine how Zetafax converts numbers entered at the workstation into a format that can be dialed. This conversion is vital if LCR is used, since numbers entered at a workstation in one location will need to be dialed by a server in another location, so numbers must be converted into a universal (canonical) format.

### Use dialing properties

Select this option to use dialing properties to convert telephone numbers.

### Dial numbers as entered

Select this option to dial numbers exactly as they are entered at the workstation. (Not available if LCR is enabled).

### Configure

This starts the [Dialing properties](#) dialog to set up dialing properties.

### Related topics

[Configuring dialing properties](#)

[Dialing properties](#)

[Zetafax Configuration](#)

[Server settings](#)



## Uninstalling Zetafax

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- To uninstall Zetafax:

1. Double-click the **Add/Remove Programs** icon in the **Control Panel** folder.
2. The **Add/Remove Programs** dialog is displayed.
3. Select the component to remove and click **Add/Remove...** .

If you select **Zetafax Server** from the list, the Zetafax client software will also be removed during the uninstall process.



## User Configuration

---

This dialog allows Zetafax users, Zetafax email gateway users and user groups to be configured. A gateway user is allowed to send email messages as fax messages and may be configured either to be attached to a host Zetafax account or to be a full Zetafax user. A user group allows faxes to be viewed by more than one user. Users can each belong to a group, and faxes may be received by a group account rather than by a specific user.

### User type

Choose the type of user to configure.

You may configure Zetafax users, email gateway users or Zetafax groups. You may also choose NT users, in which case you can configure Zetafax users by browsing a list of NT users (either on your network or your local machine).

### Enabled users

This displays a list showing all the users who are enabled to use Zetafax for the user type you have chosen. The format of the display depends on the user type.

If you are configuring Zetafax users, the first entry in the list is always: (new). This represents the new user default settings.

If you are configuring email users, each entry shows the Zetafax account name to which it is attached. Select a user account to edit or delete by highlighting it with the mouse or cursor keys.

### New

This button is displayed if the user type is not an email gateway user. It allows you to create new user accounts provided that the licensed number of users has not been exceeded.

If there are multiple NT users highlighted in the 'Not enabled' window, then Zetafax accounts are created automatically for all these users and a Zetafax account name is used which is based on the NT account name. The new Zetafax users then become visible in the list of enabled users.

Otherwise, the **Add new Zetafax user** dialog box is displayed.

### Enable

This button is displayed if the user type is email gateway user. It allows you to enable users of your email system to use the Zetafax email gateway for sending emails, providing that the licensed number of Zetafax users is not exceeded.

The **Zetafax add email guest users** dialog box is displayed which allows you to select a host Zetafax account name. The currently highlighted users from the *Not enabled* window are added to the Enabled list as guest users of this Zetafax account.

### Edit

Edit the currently selected user account. Displays the **Zetafax user details** dialog box.

### Delete

Delete the currently selected Zetafax user account.

### Disable

Disable the currently selected user from using the email gateway.

### Not enabled

This displays a list showing users who are not configured to use Zetafax and are of the chosen user type. This option is available if the user type is NT users or Email users.

Select the user accounts to add by highlighting them with the mouse or cursor keys.



**Close**

Close the dialog box and save any user changes made.

**Related topics**

[Zetafax users](#)

[Creating Zetafax user accounts](#)

[Security](#)

[Setting up email gateway users](#)



## User edit - dial permissions

---

Your **User Dial Permissions** allow you to enable or disable certain sets of number for faxing for each user. This allows you to restrict the type of Fax sending that your users can send.

In order to set up these number types, it is first necessary to set up your **Phone number category rules** found within your **Server Settings**.

Lets you select that categories of fax numbers to which this user is permitted to send messages. The categories are defined in the **Phone number category rules** item (**Server Settings** folder).

### Local numbers

Specifies that this user may send to numbers in the local category.

### All national numbers

Specifies that this user may send to any national number, including numbers in all national categories.

### National 1-9

Specifies that this user may send to numbers in the particular national category.

### All international numbers

Specifies that this user may send to any international number, including numbers in all international categories.

### International 1-9

Specifies that this user may send to numbers in the particular international category.

### Related topics

[Phone number category rules](#)

[Zetafax users](#)

[Set new Zetafax user defaults](#)

[Creating Zetafax user accounts](#)

[Security](#)

[Setting up email gateway users](#)

[User edit - send time](#)

[User edit - permissions](#)



## User edit - permissions

---

Lets you specify whether the user has permission to acts as administrator, send urgent messages, edit address books, and send to non-address-book addressees.

### Administrator

Specifies that this user is an Administrator, and hence in the **Zetafax Client** program can view the logs of other users.

### Submit URGENT messages

Specified that this user may mark outgoing messages as Urgent. Urgent messages are sent before non-urgent messages.

### Edit network address book entries

Specifies that this user may edit network address book entries.

### Edit private address book entries

Specifies that this user may edit private network address book entries.

### Send to recipients not in address books

Specifies that this user may send messages to fax numbers that are not in any address book.

### Related topics

[Zetafax users](#)

[Set new Zetafax user defaults](#)

[Creating Zetafax user accounts](#)

[Security](#)

[Setting up email gateway users](#)

[User edit - dial permissions](#)

[User edit - send time](#)



## User edit - printing

---

Lets you specify whether and how messages sent and received by this user are automatically printed.

### Sent faxes

Provides the settings for sent messages.

#### Printer to use

Displays the name of the printer to use.

#### Select

Lets you select the printer to use.

#### Use default server settings

Specifies that the default server settings (set by **Automatic printing of sent faxes** in the **Server Settings** folder) should be used instead of the **Print fax message** and **Print fax status** settings below.

#### Print fax message

Specifies that the fax message be printed.

#### Print fax status

Specifies that a fax status report be printed, if the fax message itself is not being printed then the first page of the fax will be included with the report.

#### Print failed fax message

Specifies that failed fax messages will be printed.

### Received faxes

Provides the settings for received messages.

#### Printer to use

Displays the name of the printer to use.

#### Select

Lets you select the printer to use.

#### Use default server settings

Specifies that the default server settings (set by **Automatic printing of received faxes** in the **Server Settings** folder) should be used instead of the **Print fax message** and **Print fax status** settings below.

#### Print fax message

Specifies that the fax message be printed.

#### Print fax status

Specifies that a fax status report be printed, if the fax message itself is not being printed then the first page of the fax will be included with the report.

#### Delete fax after spooling for printing

Specifies that the message be deleted after it has been spooled for printing.

### Related topics

[Zetafax users](#)

[Set new Zetafax user defaults](#)

[Creating Zetafax user accounts](#)

[Automatic printing](#)

[Configuring devices](#)



## User edit - send time

---

Lets you set the days and times at which messages from this user will be sent. To display this dialog, click **Send time** in the [Zetafax user details](#) dialog.

### All day

Specifies the days of the week on which this user may send messages at any time of the day. **Mon, Tue, Wed, Thurs, Fri, Sat, Sun**

Select a check box to allow the user to send faxes at any time during that day.

### Other days (24 hour clock)

Specifies the period within the day during which this user may send messages on days excluded from **All day**.

### From

Specifies the send from time, using the 24-hour clock. Valid range 00:00 to 23:59

### To

Specifies the send until time, using the 24-hour clock. Valid range 00:00 to 24:00

### OK

Accepts the send times specified and return to the **Zetafax user details** dialog.

### Cancel

Cancel the request to edit the user's allowed send times, and return to the [Zetafax user details](#) dialog.

### Related topics

[Zetafax users](#)  
[Set new Zetafax user defaults](#)  
[Creating Zetafax user accounts](#)  
[Security](#)  
[Setting up email gateway users](#)  
[User edit - dial permissions](#)  
[User edit - permissions](#)



## User groups

---

You can create groups of Zetafax users to apply common settings to a number of Zetafax users, e.g. for a specific department. You can add a description of each group and configure [routing](#) and [printing](#) options.

### Related topics

[Zetafax users](#)

[Creating Zetafax user groups](#)

[Zetafax user group details](#)



## User Wizard

---

The User Wizard is designed to help you set up your initial set of Zetafax users. It will be run as part of the Server Configuration Wizard after a new install. Additionally it will be run separately when you start the Zetafax Configuration program if you have no Zetafax users configured.

The first page of the wizard tells you how many Zetafax users you have currently configured and how many users you are licensed for. Clicking **Next** takes you to the next page while clicking 'Cancel' exits the wizard. The second page displays a list of the users in your primary Windows domain, and allows you to browse to other domains if required. The third column shows the Zetafax User Name, indicating which Zetafax Users are currently configured. When the Zetafax Configuration is run for the first time after a new install a Zetafax User account will have been automatically created for the currently logged-in user and you will be able to see their Zetafax User Name in this column. You can highlight the user(s) you wish to configure and click 'Next' to configure them. A dialog box will appear telling you how many users you have just enabled and you are taken to the third page of the wizard. The third page of the wizard shows you how many Zetafax Users are now enabled.

**Note:** To change the domain that is currently displayed, select the **Browse...** button. This opens the **Select User and User** groups dialog. To change the domain, select on the **Locations...** button.

### Related topic

[Server Configuration Wizard](#)





## Zetafax users and user groups

The **Users and user groups** folder in the **Zetafax Configuration** program contains the users and groups that have been configured, and enables you to add to and edit them.

While this folder is selected in the left pane, use the **Action** menu or right-click your mouse to add or edit users. See below for a brief description of the **Zetafax Configuration** user interface:

### Zetafax users

The **Zetafax users** item lists the Zetafax users that have been created.

The right pane shows these columns headings:

**Network login ID** : The user's network login ID.

**Full Zetafax name** : The user's full name as displayed in the Zetafax programs.

**Zetafax user name** : The short name used to identify the user to Zetafax programs.

In addition, to displaying activated Zetafax users, all email users will be displayed if your email gateway has been set up correctly. This allows you create new Zetafax users from a list of users of your email systems. See [Setting up email gateway users](#) for more information.

### Related topics

[Creating Zetafax users](#)

[Enabling network users for Zetafax](#)

[Creating Zetafax user groups](#)

[Zetafax usernames](#)

[Security](#)



## Using Zetafax with a network scanning device

---

This section provides technical information about configuring various aspects of the Zetafax server software. It is intended for the network administrator or similar person who has a knowledge of Microsoft Windows.

### **Related topic**

[Using Zetafax with the HP Digital Sender](#)



[www.equisys.com](http://www.equisys.com)

The Equisys website offers online [technical support](#) to all customers any time they need it. This site contains a comprehensive and fully searchable knowledge base of [technical notes](#), giving quick and accurate answers to many common questions and problems, as well as access to software patches and maintenance releases.

UK purchasers of Zetafax starter systems are entitled to a 30-day period of free email technical support with Equisys. Once this period has expired, UK customers can purchase one of the support options listed in the [What to buy](#) section.

Customers outside the UK should contact their local distributor for technical support in their country. [Click here](#) for contact details of the distributor in your country.



## Zetafax folder

---

Contains in the left pane, the Zetafax Server configuration folders and items, and in the right pane, shortcuts to those that are most frequently used.

For help on the left-pane items, see the items in this **Zetafax** folder in the left pane of this Help display. The right-pane shortcuts are:

### Add user

Adds or configures a new Zetafax user. This is equivalent to the **Add new Zetafax user** command (on the **Action** menu) for the **Zetafax users** item (in the **Zetafax** folder, **Users and user groups** folder).

### Add device

Adds or configures a new device. This is equivalent to the **Add** command (on the **Action** menu) for the **Devices** item (in the **Zetafax** folder).

### Server settings

Configures the Zetafax email gateway or other server settings. This is equivalent to the **Server settings** folder (in the **Zetafax** folder).

### Visit web

Launches the Equisys web site in the right pane. This is equivalent to the **www.equisys.com** command (in the **Zetafax** folder).

Many folders within the Zetafax folder contain items which may be added and deleted, such as user accounts, cover sheets, letterheads etc. Right-clicking such an item provides a [menu of commands](#) that work on that item.

### Related topics

[Zetafax users](#)

[Devices](#)

[Automatic inward routing](#)

[Server settings](#)

[cover sheets](#)

[Letterheads](#)

[License and Registration](#)



## Zetafax groups

---

Contains the details of groups of Zetafax users.

While this folder is selected in the left pane, the **Action** and **Right-click** menus provide commands that work on this folder.

The right pane shows the users within this folder, with the following columns of information:

### Group name

The name of the group.

### Description

The description of the group.

While a group is selected in the right pane, the **Action** and **Right-click** menus provide commands that work on this group.

### Related topics

[Add new Zetafax user group](#)

[Zetafax user group details](#)

[Zetafax users](#)



## Zetafax user details

---

Lets you enter the details of a new user or edit the details of an existing user.

### Zetafax user name

The short name used to identify the user to the Zetafax programs. This name is chosen when the user is created and may not be changed subsequently.

### Network login id

The ID under which this user logs in to the network. This is usually the same as the **Zetafax user name** .

### Full name

The full name of this user as displayed by the Zetafax programs.

### Member of group

The group of which the user is a member.

### Routing...

Lets you add and edit routing rules for this user, displaying the [Inward routing rules](#) dialog.

### Allow sending from email gateway

Specifies whether this user may send messages through the email gateway. This check box is unavailable if the Email Gateway is not enabled (under **Email gateway** , **Server Settings** folder).

### Include faxes sent by Zetafax client in Outlook Zetafax Outbox

Specifies whether messages sent by this user are placed in the Zetafax Outbox of the Outlook email program. This check box is unavailable if the Email Gateway is not enabled and Microsoft Exchange is not the email type (under **Email gateway** , **Server Settings** folder).

### Forward received messages via email

Specifies whether received messages are to be forwarded to the user's email address. This check box is unavailable if the Email Gateway is not enabled (under **Email gateway** , **Server Settings** folder).

### Email user name

Specifies this user's email address, to be used for sending and forwarding of fax messages by email. Test Tests the user's email address by sending a test message to it.

### Send time...

Lets you set the send time options for this user, displaying the [User edit - send time](#) dialog. The current settings are displayed to the right of the button.

### Dial allowed...

Lets you set the dial permissions for this user, displaying the [User edit - dial permissions](#) dialog. The current settings are displayed to the right of the button.

### Permissions...

Lets you specify the general permissions given to this user, displaying the [User edit - permissions](#) dialog. The current settings are displayed to the right of the button.

### Printing...

Lets you specify the printing options for this user, displaying the [User edit - printing](#) dialog. The current settings are displayed to the right of the button.

### Cleanup...

Lets you specify the Auto Cleanup options for this user, these values override the system wide [Auto Cleanup settings](#) for this user's Inbox and Outbox.

### Reset

Resets the user's details to default values, set using the **Set new Zetafax user defaults** command (on the **Action** menu) of the **Zetafax users** folder (in the **Users and user groups** folder).

### Related topics

[Zetafax users](#)

[Set new Zetafax user defaults](#)

[User edit - send time](#)

[User edit - dial permissions](#)

[User edit - permissions](#)

[User edit - printing](#)



## Zetafax user group details

---

Lets you enter the details of a new group or edit the details of an existing group.

### User group name

The name used to identify the group. This name is chosen when the group is created and may not be changed subsequently.

### Description

The description of the group, displayed by Zetafax to aid identification of the group by the user.

### Routing...

Lets you add and edit routing rules for this user, displaying the [Inward routing rules](#) dialog.

### Members of group

The users that are currently members of the group.

### Add

Adds the user selected in **Not members of group** to the group.

### Remove

Removes the user selected in **Members of group** from the group.

### Printing...

Lets you specify the printing options for this group, displaying the [User edit - printing](#) dialog. The current settings are displayed to the right of the button.

### Related topics

[Add new Zetafax user group](#)

[Zetafax groups](#)

[Zetafax users](#)





## Zetafax users

---

Contains the account details of Zetafax users.

While this folder is selected in the left pane, the **Action** and **Right-click** menus provide commands that work on this folder.

The right pane shows the users within this folder, with the following columns of information:

### Network login ID

The ID under which this user logs in to the network.

### Full Zetafax name

The full name of this user as displayed by the Zetafax programs.

### Zetafax user name

The short name used to identify the user to the Zetafax programs.

While a user is selected in the right pane, the **Action** and **Right-click** menus provide commands that work on this user.

### Related topics

[Zetafax users](#)

[Add new Zetafax user](#)

[Set new Zetafax user defaults](#)



## ZSUBMIT automatic file submission program

---

Provides configuration options for the ZSUBMIT program used by Zetafax API programs to automatically submit messages for sending. To display this dialog, double-click **ZSUBMIT automatic file submission program** in **Server settings**, or select the **Auto submit** icon from the **Zetafax - configuration options** dialog.

### Directory for files

Specify the directory which the ZSUBMIT program looks in for SUBMIT files to send. Any files found whose names match the given specification (normally "\*.SUB" - see Expert setup options) will be interpreted as SUBMIT format files and submitted to the server for sending.

### Scan frequency

Specify the polling interval, in seconds. This is how often the program looks for SUBMIT files in the directory for sending and check the status of messages already queued. Reducing this value will increase the processing overhead of the program.

### Zetafax user account

Set up the user account details for use with auto submission of faxes.

### Default user

Specify the Zetafax user account to be used when submitting files. All messages will be sent as if by this user, unless a user name is specified in the SUBMIT file. If the user name is left blank then each SUBMIT file must specify a user name.

### Allow any user

Specify whether users can specify the Zetafax user name in the SUBMIT file, overriding the name given in the **Default user** field. Do not check this box if you want to ensure that messages can only be submitted as the given user when using the ZSUBMIT program (e.g. for permissions or security reasons).

### Delete successful messages

Check this box if faxes that have been sent successfully (i.e. faxes that would be displayed on the Zetafax Client with a tick) should be deleted automatically. This is useful in systems where a large number of faxes are being submitted automatically and you just want to check for any which have failed.

### Maximum queued messages allowed

Specify the maximum number of messages that may be active in the queue for this user at any one time. If the value is 0 then any SUBMIT file found in the directory will be submitted to the server immediately, when it is found. Otherwise the file is only submitted if the number of active messages is less than the specified value. The program will wait for one of the existing messages to complete, before submitting the file.

### OK

Save any changes that have been made to the ZSUBMIT automatic file submission program configuration, and exit the Zetafax - configuration options dialog.

### Cancel

Do not save changes made to the ZSUBMIT automatic file submission program configuration, and exit the Zetafax - configuration options dialog.

### Reset

Reset the ZSUBMIT automatic file submission program configuration to its default settings. The settings are not saved until either **OK** is clicked or another category icon is selected from the scroll (left).

If you use the scrolling icons on the left to move to another **Category**, any changes made to the ZSUBMIT automatic file submission program configuration are saved.

---

**Related topic**  
[Server settings](#)

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