

# MiCollab Advanced Messaging RightFax Integration Guide

For version 6.1 and above

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# Preface

This document is intended for administrators and technicians who are familiar with MiCollab Advanced Messaging (MiCollab AM), MiCollab AM terminology, and navigating through MiCollab AM Admin. This document assumes you have a basic understanding of MiCollab AM Admin, MiCollab AM Configuration, and RightFax.

## References

A catalog of technical documentation is included on the MiCollab AM Installation Media. If you are installing any advanced applications, such as Networking and Fax Server applications, you should refer to the appropriate technical documentation for application and installation information.

## Documentation

The technical documentation is produced in the PDF format and requires the PDF reader to view it. The documentation set for this MiCollab AM includes the following documents and resources:

- **Developer Resources.** Contains programming guides and API references for developers for integrating the server clients and web applications with MiCollab AM.
- **Integration Technical Notes (ITN).** Contains a set of guides that describe the integration methods and instructions for a variety of phone systems to work with MiCollab AM. The ITNs are generally used by resellers or administrators who are experienced with MiCollab AM and familiar with the integration procedures and terminology.
- **Quick Reference Card (QRC).** Contains shortcuts and quick instructions telling subscribers how to access and use the messaging system.
- **Server Documentation.** Available as a PDF only. Contains administrative guides for administrators about installing, configuring, and administering the messaging system, and user guides for subscribers about accessing the messaging system and checking and sending messages.
- **Spare Parts Documentation.** Contains a set of guides that describe the instructions for installing and configuring hardware parts to work with MiCollab AM. These documents are written for Mitel certified MiCollab AM technicians who are experienced with MiCollab AM and familiar with the procedures and terminology.
- **Software Release Notice (SRN).** This notice introduces the new features, capabilities, and hardware/software requirements for the corresponding MiCollab AM version.

## Documentation Updates

Documentation updates may be available from the following sources:

- Mitel certified technicians can view or download documents and program files from our partner web site: [connect.mitel.com/connect](https://connect.mitel.com/connect)

## Help

The primary source of information about MiCollab AM is the online help available within any of its administrative utilities. You can access **Help** as follows:

- Click the **Help** button in the dialog box or window in which you are working
- Press the **F1** key at any time.

## Document Conventions

The following conventions are used in this document:

- **Key Names.** Names of keys on the keyboard are shown in a box.

Example: **Enter**

When two keys must be pressed simultaneously, they are joined by a + sign.

Example: **Alt** + **Tab**

- **Reference to Document.** *Italics* fonts can also signify the titles of other documents.

Example: Refer to *System Installation Guide*.

- **UI Element Names.** Names of UI elements such as dialog windows, screens, menu items, tabs, buttons, icons, etc. are shown in bold.

Example: On the **Startup** screen, click the **Start** icon.

- **User Input.** Information required to be typed is shown in italics.

Example: Type the password *voicemail*.

- **Warning, Caution, Important, and Notes.** Text for the contents that require attention are shown as follows:

**WARNING** A warning paragraph advises you of circumstances that can result in the loss of data, harm to the system server platform, or personal harm.

**CAUTION** Failure to follow these recommendations can result in unauthorized access to the system and consequent loss of data.

**IMPORTANT** An important paragraph gives decision-making information or informs you of the order in which tasks need to be completed.

**NOTE** A note gives additional information, provides an explanation, or indicates an exception to the information in the preceding text.

# RightFax Integration Overview

Fax functionality for MiCollab Advanced Messaging (MiCollab AM) is supplied through integration with a RightFax 10.6 server from Open Text. This document outlines how to integrate a RightFax server with MiCollab AM. Before doing the integration, you must have the RightFax server installed and running as instructed in the RightFax documentation. You also need to have MiCollab AM installed as described in System Installation Guide.

**IMPORTANT** RightFax is required to support Fax Over IP (FoIP). MiCollab AM does not natively support FoIP.

## Important Facts You Should Know

This section lists known benefits and limitations that affect the integration and its use. Be sure to review this information before continuing.

- Dialogic® Brooktrout® fax boards are the only fax boards supported on RightFax servers that are integrated with MiCollab AM servers. Any RightFax BoardServer that is integrated to MiCollab AM must drive Brooktrout fax boards only.
- You must install the latest RightFax server hot fix, which is available for download at [www.opentext.com](http://www.opentext.com).
- The MiCollab AM and RightFax services need to be assigned separate logon accounts. If this has not already been done, refer to the *MiCollab AM and RightFax installation documentation*.
- If MiCollab AM and RightFax are not a part of a domain, the account that MiCollab AM logs on with must exist and be enabled on the RightFax server.
- Users can select the Contact Information command from the Help menu in FaxUtility to find out whom to contact if they encounter difficulties with their RightFax accounts. This contact information is stored in the Program Files\RightFax\Bin directory on the fax server platform, in a file called Contact.txt. By default, this file contains instructions on contacting RightFax technical support. However, if you prefer, you can edit it to provide the names and email addresses of your system administrators, their extensions or telephone numbers, and the times at which they are available. The fax server must be restarted for your changes to take effect.

**IMPORTANT** The Customize Cover Sheet Information dialog box in the fax server must have only To Name and To Fax Number selected. (You can reach this dialog box by clicking Customize Coversheets on the Enterprise Fax Manager Utility menu.)

The telephony gateway submits faxes to RightFax with name and fax number data. When a custom cover sheet requires additional information beside the contents of these two fields, RightFax requests that additional information, which MiCollab AM cannot provide. When this happens, the fax remains undelivered.

# Setting Up Fax Support in MiCollab AM

The Telephony Gateway enables the MiCollab AM fax features and allows MiCollab AM to be integrated with the fax server. To set up the gateway, you must perform the following steps:

- Review installation requirements.
- Install the MiCollab AM feature file.
- Establish LAN connections between the two platforms.
- Specify the RightFax server name and LAN protocol in the MiCollab AM Configuration utility.
- Configure the MiCollab AM system's dialing plans.
- Create a source mailbox that will be used to receive faxes from the fax server then to forward them to the appropriate destinations.
- Install or create cover pages.

## Reviewing Installation Requirements

This section lists the requirements for successfully installing fax support for MiCollab AM. Be sure to review and meet these requirements before continuing in this book.

### Server Requirements

- RightFax server software version 10.6 Feature Pack 3 with the current RightFax server hot fix, if any
- A MiCollab AM feature file that is enabled with the fax applications you have purchased, emailed from Mitel. Place this file on your network or on a removable media such as CD-R so that it is accessible by the MiCollab AM server.

### Document Storage Requirements

The MiCollab AM server expects fax cover pages to be stored in Hewlett-Packard's Printer Control Language, version 5.0 (PCL 5). Storing the cover pages in this format allows RightFax to insert new information to cover pages when it sends them out. The fax server normally stores FaxText library documents and other faxes as Group 3 TIFF bitmap files.

Before setting up a FaxText application, you will need to make sure that the fax server platform has enough free disk space for all of the library documents, cover pages, and subscriber faxes it must store. 1. Estimating fax document storage requirements provides guidelines for calculating how many kilobytes (KB) of space the fax server will need.

**IMPORTANT** You must leave at least 50 megabytes (MB) of hard disk space open on the fax server's working drive (normally D). If there is less than 50 MB of space on this drive, the fax server will not be able to send faxes.

Table 1. Estimating fax document storage requirements

Type of Document	Space Required	File Extension
Text documents, as PCL 5	100 KB per page	.pcl
Full-page graphics, as PCL 5	350 KB per page	.pcl
Microsoft Word documents	50 KB per page	.doc
TIFF documents with Group 3 compression	35 KB per page	.tif
Temporary files	50 MB	Not applicable

**NOTE** The guidelines in [Table 1](#) assume a resolution of 300 dpi.

For example, by the guidelines in [Table 1](#), you could estimate the disk space required for a document library consisting of 50 cover pages in PCL 5 format, plus 200 pages of graphics in TIFF format:

$$50 \text{ MB} + (50 \times 350 \text{ KB}) + (200 \times 35 \text{ KB}) = 74,500 \text{ KB (72.75 MB)}$$

In addition to meeting your current requirements, be sure to leave enough space for your fax server's future needs.

**NOTE** Many current PCL printer drivers assume that the printer has an output resolution of 600 dots per inch (dpi) or higher. The fax server can transmit a page of this resolution, but since the resulting fax cannot be greater than 200 dpi, the original page wastes disk space. For example, each full-page, 600 dpi PCL 5 page takes up more than one megabyte.

Most PCL 5 printer drivers have an option to limit output resolution to 300 dpi if their printers are capable of higher resolution levels. If you use a high-resolution PCL 5 driver to create library documents or cover pages, be sure to select the 300 dpi option.

## Telephone System Requirements

On the telephone system, make sure that the following conditions have been properly configured on lines supporting RightFax and MiCollab AM:

- Telephone lines connected to fax ports do not hunt and do not forward.
- MiCollab AM can transfer calls to RightFax ports.

**NOTE** The telephone company may require the FCC registration and Ringer Equivalency Number (REN) for any devices directly connected to their lines, including MiCollab AM voice, fax, and modem ports. To locate the FCC registration and REN, refer to the mounting bracket on the linecard or the documentation provided with the card.



## Installing the Feature File

There are three fax features: FaxText, FaxMail and FaxLines. Telephony Server Routing requires FaxMail and FaxLines. Proceed according to the software or feature you are installing.

Table 2. Feature File Installation

If you are installing...	Then...
A new MiCollab AM server	No installation is necessary; you have already installed the file during the setup sequence for MiCollab AM.
Fax support on an existing system	<ol style="list-style-type: none"><li>1 Open <b>MiCollab AM Configuration</b>.</li><li>2 In the <b>Main</b> tab, click <b>Shutdown</b> to stop MiCollab AM.</li><li>3 In the <b>Feature</b> tab, run the <b>License Import</b> program and install the feature file.</li><li>4 In the <b>Main</b> tab, click <b>Startup</b> to run MiCollab AM.</li></ol> <p>For information on shutting down and restarting MiCollab AM properly, see <i>System Installation Guide</i>.</p>

## Establishing LAN Connections

MiCollab AM and RightFax are installed on separate platforms and use a LAN connection to coordinate their handling of calls that involve both voice and fax signals, such as voice-annotated faxes and FaxText document orders. Because of this coordination, it is crucial that the LAN connections between the two platforms work properly.

The fax server can use either TCP/IP or NetBEUI/Named Pipes protocols to integrate the WorkServer modules with MiCollab AM, so one of these must be installed on both servers.

For Enterprise Fax Manager to function correctly, you must use either TCP/IP or IPX/SPX. Most customer site installations use TCP/IP. Ensure that the selected protocol is enabled on the fax server platform before you install RightFax.

The Service Accounts that MiCollab AM and RightFax use must be trusted to interact with each other's server using Local Administrator Group membership assignment. For more information on setting up service accounts, refer to the MiCollab AM and RightFax Installation Guides.

## Specifying the RightFax Name and LAN Protocol

On the Fax tab in MiCollab AM Configuration, select RightFax as the fax server, and specify the name of the RightFax server and the network protocol in the Name and Protocol boxes, as shown in Figure 1.

- If the TCP/IP protocol is used, you must type the IP address of the main fax server in the Server Name box. If the fax server also has a BoardServer installed on a third platform, type the IP address of that platform in the Board Name box. We recommend that you use dedicated IP addresses to streamline communications between the telephony and fax servers.

- If you are using Named Pipes (NetBEUI), type the computer names given to the fax server platforms in Windows. The protocol you select here must match the protocol you select in the WorkServer module configuration when you enable Telephony Server Routing.
- To integrate MiCollab AM with RightFax, you must first create an Administrator account in RightFax. Those credentials must then be entered into the **RightFax User ID** and **RightFax Password** fields on the **Fax** tab of MiCollab AM Configuration.

**NOTE** The account used should not be the default RightFax administrator account. For security the account used should have a password. The **Test Connection** button will verify that the connection and account are valid.

For additional information on completing the Server Name and Server Protocol boxes, refer to the online help.

Figure 1. Fax Tab, MiCollab AM Configuration

## Configuring the MiCollab AM Dialing Plans

Both FaxText and fax messaging use dialing plans that let MiCollab AM validate telephone numbers entered by outside callers and subscribers when they want to transmit faxes.

### For example:

If a caller enters only six digits for their telephone number, MiCollab AM can look up the number on the dialing plan, and then prompt the caller that the number is invalid. The caller then can re-enter the correct seven-digit telephone number.

The dialing plan also gives MiCollab AM dialing instructions for telephone numbers and indicates the call type: international, long distance, local, or extension. With the information from the dialing plan, the server can correctly place calls to any telephone number.

MiCollab AM uses the call type information it receives from the dialing plan to determine whether or not the call is allowed.

**For example:**

If a subscriber sends a fax to a long-distance number, the server uses the dialing plan to determine the call type. MiCollab AM then checks for the subscriber's mailbox to see if the subscriber has long-distance callouts allowed. If they are allowed, MiCollab AM places the call; if not, it advises the subscriber that the call is not allowed.

The fax server uses a similar dialing plan for its own outgoing calls, such as outbound faxes from subscribers. Using a sophisticated set of routing rules, the fax server can calculate the least-costly time of day to send a low-priority or medium-priority fax. If a network has more than one fax server, the dialing plans of the fax servers can be coordinated to share the total load of outgoing faxes.

When setting up the fax server's dialing plan, keep in mind that MiCollab AM output to the fax server must be determined, as well as client-generated telephone numbers for outgoing calls.

**For example:** Adding 9 to the beginning of local or long-distance calls.

Be sure to coordinate the two dialing plans to work together.

To configure MiCollab AM's dialing plan, refer to the **MiCollab AM Admin** utility's online help. The RightFax Administrator's Guide contains the corresponding instructions for setting up the fax server's dialing plan.

**IMPORTANT** The telephone system at your site may offer the sophisticated cost-effective routing features of its own. If so, you may want to use your MiCollab AM and RightFax dialing plans only to validate extension, local, and long-distance numbers. To provide the least-cost routing, set up your telephone system so that it processes all outbound calls and faxes according to its dialing plan.

## Creating a Source Mailbox for Delivering Faxes

You must create a mailbox that the fax server can use to deliver faxes to MiCollab AM recipients. MiCollab AM uses the name of this mailbox as the sender's name on faxes routed from the fax server to destinations within MiCollab AM.

**NOTE** While this mailbox can be a subscriber mailbox, we strongly recommend that you use a Call Processor mailbox, which does not require a security code.

MiCollab AM uses the name that you record for this mailbox as the information prompt subscribers hear when a fax message is received from outside the system. When you record the name, use a generic phrase, such as "... the fax server" that will make sense when it follows such system prompts as "*This fax was sent on June 15th at 2:23 PM by ...*".

**NOTE** When using this method of routing, no caller ID information can be passed on to the server.

## To provide a call processor for fax messaging:

- 1 Create the call processor mailbox and specify a name that identifies the source of the fax, such as **Fax Server**.

**NOTE** It is not necessary to configure any key actions for this call processor, because the fax server will be interacting with it over a LAN connection rather than by telephone.

However, to ensure that any caller who gains access to this mailbox by accident is returned safely to MiCollab AM's current initial call processor, we recommend that you set all key actions to **Go To Ans Mode**. Set the timeout for this mailbox to **0** (zero).

- 2 Record the name for this mailbox. For more information about recording mailbox names, see *System Administration Guide*.

## Installing or Creating Cover Pages

For your fax application to work properly, your system must have at least one cover page available. This is especially true for FaxText applications, which will not work if the cover page is missing, but it is important for fax messaging as well.

Mitel supplies five standard cover pages – four for fax messaging and one for FaxText – on the MiCollab AM Installation Media in the **\Utilities\FaxCover** folder.

The cover-page file used for FaxText must be called **faxtext.doc** or **faxtext.pcl** and must be located in the cover-page directory **Program Files\RightFax\Fcs** on the fax server.

**NOTE** Mitel highly recommends using Microsoft Word files (.doc) for cover pages, but .pcl files are still supported.

You can use Microsoft Word to create your own cover pages. Once you have finished making a cover page, simply save it as **faxtext.doc** and move it into the **Program Files\RightFax\Fcs** directory.

**IMPORTANT** If you make your own cover page, make sure to rename the **faxtext.pcl** file. Doing so enables you to troubleshoot cover page issues that may arise.

# Integrating RightFax with MiCollab AM

To ensure that the RightFax server can communicate with MiCollab AM, you must:

- Install the current hot fix for RightFax 10.6 (if any) on the RightFax server.
- Set up two new WorkServers with the Enable Telephony Server Routing option and the File Route capability enabled.
- Assign channel capability to the board servers.
- Set up the fax default user account.
- Set up subscriber accounts in MiCollab AM that will use fax messaging.
- Make sure the MiCollab AM Service and RightFax Service are set to logon with their own Service Account.

## Assigning MiCollab AM to Two WorkServers

You must assign MiCollab AM to exactly two RightFax WorkServers, typically WorkServers 4 and 5. These WorkServers must have Telephony Server Routing enabled and must be assigned exclusively to the FileRoute service.

**IMPORTANT** Be sure to create two new work servers to assign MiCollab AM to instead of re-configuring existing work servers. Failure to do so can result in an inability to send outbound faxes.

### To enable Telephony Server Routing for two WorkServers:

- 1 Start the RightFax Enterprise Fax Manager.
- 2 In the lower pane of the server status display in the main Enterprise Fax Manager window, locate the WorkServer you want to enable and double-click it.
- 3 In the Telephony Server Routing group box, select **Enable**.
- 4 Proceed according to whether this WorkServer is the first one you have configured.

Table 3. WorkServer configuration possibilities

If this WorkServer is...	Then...
The first WorkServer configured	Select <b>Route Documents</b> .
The second WorkServer configured	Clear <b>Route Documents</b> .

- 5 If you want RightFax to delete all incoming fax messages after routing them to MiCollab AM, select **Delete after route**.

- 6 In the Services list, select **FileRoute** and clear all other selected items.
- 7 Click **OK** to save your changes.
- 8 Repeat steps 2 through 7 for the second WorkServer that should support Telephony Server Routing.

For more information, refer to the online help or the RightFax documentation.

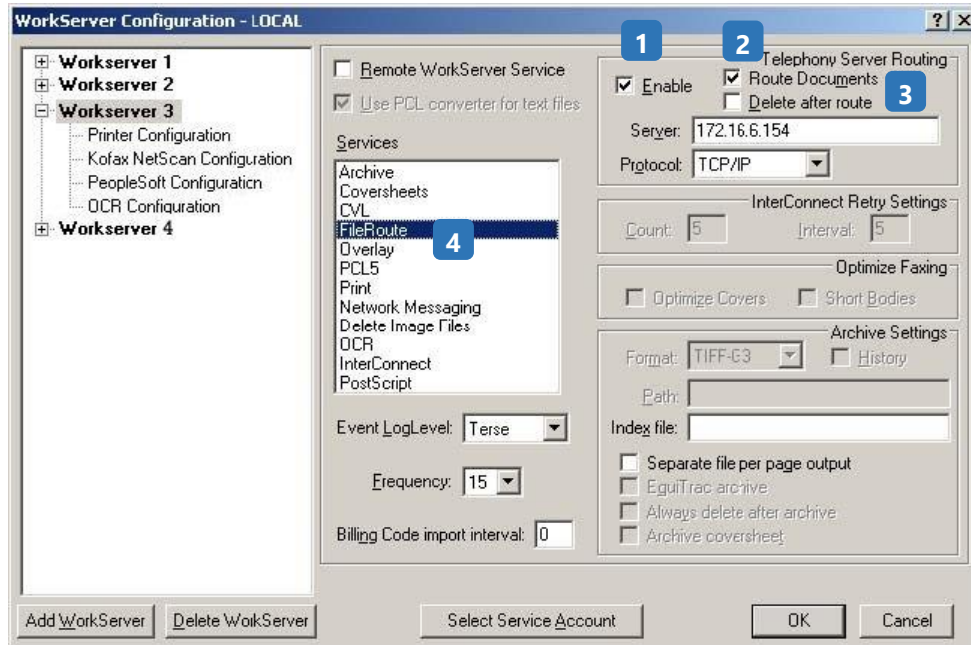


Figure 2. WorkServer Configuration

- 1 Click Here to enable Telephony Server Routing
- 2 Click here to designate this as the initial WorkServer assigned to Telephony Server Routing.
- 3 Click here to delete fax messages after routing them to MiCollab AM.
- 4 Select this option for both WorkServers.

## Assigning Channel Capability to the BroadServers

The Board Configuration screen in the RightFax Enterprise Fax Manager utility lets you configure the channels (ports) used for fax. Using the Capability box shown in Figure 4 and Figure 5, you can specify how each channel will be assigned. MiCollab AM can use only the **Dial w/ Ring Detect** setting, so that setting must be used for all RightFax BoardServer channels that will be used for communication between the telephony and fax servers. Setting the Capability box to **Dial w/ Ring Detect** allows MiCollab AM to receive and send faxes while allowing the fax server to use the channel as well.

### To edit the settings configured in the BoardServer module:

- 1 Start the RightFax Enterprise Fax Manager.

- 2 In the lower pane of the server status display in the main Enterprise Fax Manager window, locate the BoardServer module and double-click it.
- 3 In the tree diagram at the right of the DocTransport Configuration dialog box, expand Legacy and select **RightFax Boardserver**. Click Configure Boardserver to open the Board Configuration dialog box (see [Figure 3. Assigning channel capability at the board level](#)).

**IMPORTANT** MiCollab AM can interact with only one BoardServer. Make sure that the fax board associated with that BoardServer has enough ports to support communication between MiCollab AM and the fax server.

The type of board you use dictates how you may assign channel capability. For example, if you use a board such as the Brooktrout TR-1034+P4-4L, which has all loop-start channels, you may set the channel capability for all channels at the board level as shown in Figure 3.

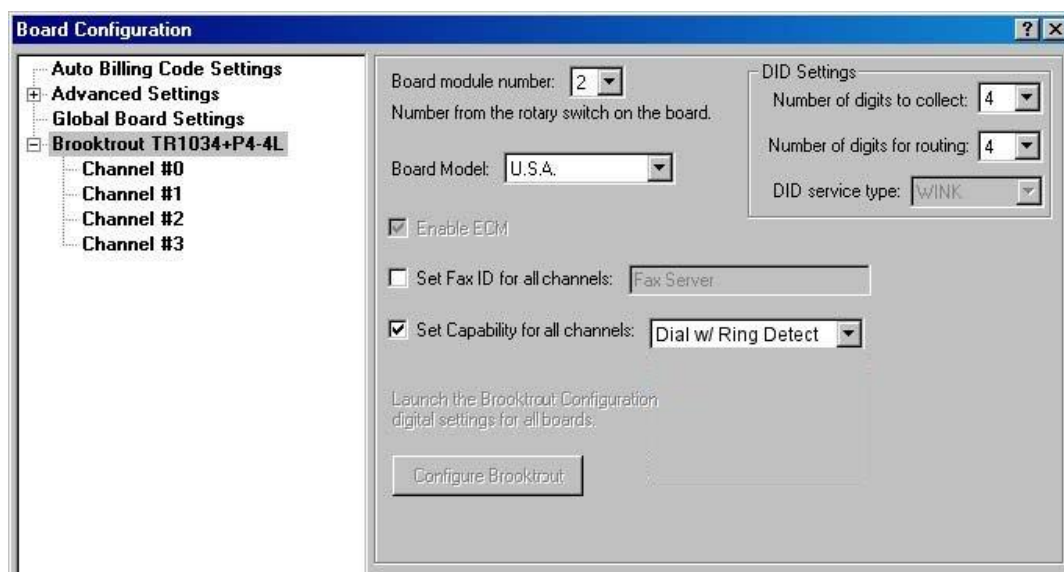


Figure 3. Assigning channel capability at the board level

## Setting Up the Default User

This section shows how to take advantage of the Default User account on the fax server to speed up subscriber configuration for MiCollab AM integration. The Default User account is installed with the RightFax software to contain the default settings that will be applied to all actual user accounts as they are created.

Adding routing information to the RightFax Default User ensures that new fax user accounts automatically contain the correct routing information. You can also create and manage fax user accounts using normal RightFax administration.

The fields outlined in this section are required to route faxes to MiCollab AM. You can use this information to set up the Default User or to configure subscriber fax user accounts individually.

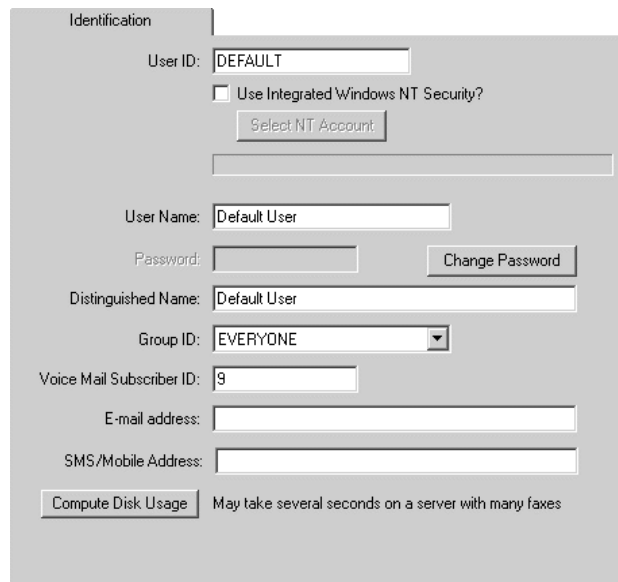
**IMPORTANT** Be sure to set up the Default User account correctly if you plan to use any MiCollab AM automatic mailbox creation feature, such as mailbox import, to create a large number of subscriber mailboxes.

## Identification Tab and Inbound Routing Tab of the Edit User Dialog Box

When setting up the Default User account in RightFax, you do not need to enter data in the Voice Mail Subscriber ID box. This information will be added later through the Fax tab in the MiCollab AM subscriber mailbox for each new subscriber.

When setting up a user individually in RightFax, however, make sure the Voice Mail Subscriber ID box displays the correct information. *This is a required value.*

Be sure to configure the other boxes on the Identification and Inbound Routing tabs as shown in Figures 4 and 5, using the values provided in [Table 4](#).



The screenshot shows the 'Identification' tab of the 'Edit User' dialog box. The fields and their values are as follows:

- User ID: DEFAULT
- ☐ Use Integrated Windows NT Security? (with a 'Select NT Account' button below it)
- User Name: Default User
- Password: (empty field) with a 'Change Password' button
- Distinguished Name: Default User
- Group ID: EVERYONE (dropdown menu)
- Voice Mail Subscriber ID: 9
- E-mail address: (empty field)
- SMS/Mobile Address: (empty field)

At the bottom, there is a 'Compute Disk Usage' button and a note: 'May take several seconds on a server with many faxes'.

Figure 4. Identification Tab of Edit User screen



Figure 5. Inbound Routing Tab of Edit User dialog box

**IMPORTANT** The configuration specified in [Table 4](#) applies only if you are using Telephony Server Routing. If you are using email gateway routing, configure the values as appropriate for the gateway.

Table 4. Inbound Routing Tab of Edit User dialog box

Field	Description		
Routing Code box	Do <b>not</b> set to zero (0). Specify any other code that is appropriate to your telephone system.		
Routing Type box	Set to <b>Telephony Server</b> . This setting causes subscriber faxes to be routed to MiCollab AM.		
Routing Info box	<p>Specify the location of the MiCollab AM System Server, using the following format: <i>Protocol:Name/SourceMB/SecurityCode/SubscriberMB</i></p> <p>Example for the Default User: TCP:255.17.42.0/0100//</p> <p>Example for a fax user account: TCP:255.17.42.0/0100//3470</p> <p>The above examples assume that TCP/IP protocol is used on the LAN.</p> <table border="1"> <tr> <td><i>Protocol</i></td><td>Specify NP (Named Pipes) or TCP (TCP/IP) depending on the network protocol used. Follow with a colon (:).</td></tr> </table> <p><b>IMPORTANT</b> Mitel strongly recommends the use of TCP/IP because it is a routable LAN protocol and provides the best</p>	<i>Protocol</i>	Specify NP (Named Pipes) or TCP (TCP/IP) depending on the network protocol used. Follow with a colon (:).
<i>Protocol</i>	Specify NP (Named Pipes) or TCP (TCP/IP) depending on the network protocol used. Follow with a colon (:).		

	performance between the telephony and fax servers.
<i>Name</i>	Specify the name of the MiCollab AM System Server (Named Pipes) or the server's explicit IP address (TCP/IP).  <b>NOTE</b> Providing an explicit IP address prevents communication between the two servers from breaking down later due to a Domain Naming System (DNS) delay or failure.
<i>SourceMB</i>	Specify the call processor or subscriber mailbox number of the source mailbox used to distribute faxes to MiCollab AM mailboxes.
<i>Security Code</i>	Specify the security code of the source mailbox if it has one.
Delete after routing box  Delete after routing box (continued)	Select this box if the subscriber does not intend to use FaxUtility, the RightFax graphical user interface, to manage fax messages. Faxes can also be managed using Mitel unified messaging client software for Microsoft Exchange Server, Lotus Notes/Domino Server, or any IMAP compliant email server.  Selecting this box prevents duplicate faxes from accumulating and therefore saves space on the server.

## Setting Up Users in MiCollab AM

You can use the Fax tab in each MiCollab AM subscriber's mailbox to create and manage fax user accounts on the RightFax server. Because the settings in the RightFax Default User account automatically populate the fields on this tab for new users, you need only individualize the default settings for each new user as needed. For information about how to do this, refer to [Table 2. Feature File Installation](#).

**NOTE** The Delete after routing check box can be selected or cleared in individual subscriber mailboxes to meet the subscribers' messaging needs.