

Lotus Notes 5, 6.0 and 6.5 Step-by-Step Installation With FACSys 4.7 SP4a or higher

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Introduction

FACSys plays a Gateway role in communicating with Lotus Notes for both inbound and outbound faxing. This means that FACSys acts as another Post Office as opposed to a User entity in the Notes environment. This gives Notes users the ability to send and receive fax messages from within Notes.

This document discusses the configuration of the Lotus Notes gateway for use with FACSys v4.7 and later. For detailed instructions on installing and configuring Notes, refer to your Lotus documentation.

This document provides set-up and configuration for a Lotus Notes Domino server with the EmFAST FACSys software.

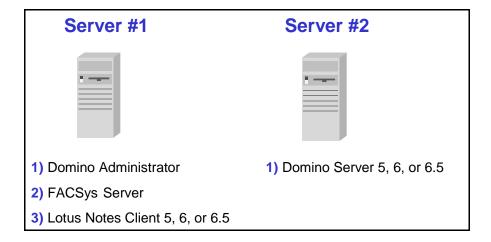
Prerequisites

Be sure to have the following installed and working before proceeding:

FACSys 4.7SP4a or higher FAX Messaging Gateway Software for Window NT Lotus Notes Domino Server 5, 6.0 or 6.5 Lotus Notes Administrator 5, 6.0 or 6.5 Lotus Notes Client 5, 6.0 or 6.5 Platform Windows NT/2000

NOTE: Each user who is "fax-enabled" through a Lotus Notes-FACSys Gateway combination requires a FACSys client license.

You must make sure that the FACSys server has been installed and configured correctly for the following configuration to work correctly. You should make sure that the Optus Fax Server service and the Optus Fax Device Manager service have been associated to a Windows NT User Account that has both Administrator and Domain Administrator privileges.



The diagram above suggests the location of each of the above software installations as they relate to the actual physical machine used:

Order of Installation

The control library files shipped with the FACSys software may conflict with the Lotus Notes client installation program. Because of this possible conflict, we recommend that you install the applications on the fax server in the following order:

- a. (If required by your configuration) Install Internet Explorer 5 or later
- b. Then install the Lotus Notes client.
- c. Then install the FACSys fax server software.

NOTE: If you are having problems sending fax messages from Lotus Notes, add the <Notes_messagefile>.nsf file to the Notes client desktop installed on the fax server (make sure you have sufficient rights to the gateway database). Do not open any jobs, but verify that you can view the jobs being submitted by Notes users.

Before starting, you will need to have met certain system requirements. Below are the system requirements for installing a Lotus Notes Gateway.

FACSys Installation Requirements

Install the FACSys Fax Messaging Gateway software as per the instructions in the FACSys Fax Messaging Gateway for Microsoft Windows NT Administrative Guide and Desktop Client Guide.

If your FACSys server is version 4.7 SP4a, you will need to update the vimget32.exe file. Please download it from www.faxserversupport.com, and replace it in the root of X:\FACSys (where X: is the drive where your FACSys server is installed). The latest version is already present in FACSys 4.8, there is no need to replace it.

Lotus Notes and Domino Administrator Client, Client, Server platforms and system requirements

Operating system patches, service packs, and other updates are not specified in the tables that follow. Note that operating system vendors frequently release updates. For the most recent information regarding updates, see the Lotus Knowledge Base online at http://www.support.lotus.com/ or contact your local Lotus Support representative. (Source of table below found in http://doc.notes.net/domino_notes/Rnext/readme14.nsf)

Notes and Domino Administrator Clients

Platform	Windows 95/98	Macintosh	Windows NT/XP
Supported operating system versions	Windows 95	Macintosh OS9	Windows NT4
	Windows 98	Macintosh OS10	Windows 2000
			Windows XP Professional
Processors supported	Intel Pentium	Power PC	Intel Pentium
Protocols supported			

NetBEUI/NetBIOS(1)	Yes	No	Yes	
NetBIOS over IP(2)	Yes	No Yes		
NetBIOS over IPX	Yes(3)	No	Yes	
SPX	Yes	No	Yes	
SPX II	No	No	Yes(4)	
TCP/IP	Yes	Yes	Yes	
X.PC	Yes	Yes	Yes	

Domino Server

Platform	AIX	Solaris	Windows NT	Linux
Supported operating system versions	AIX 4.3.3 - 006	Solaris/SPARC 2.8	Windows 2000 Intel	Red Hat 7.1 Intel
			Windows NT4 Intel(1)	Red Hat 7.2 Intel
Protocols supported				
NetBEUI/NetBIOS(2)	No	No	Yes	No
NetBIOS over IP(3)	No	No	Yes	No
NetBIOS over IPX	No	No	Yes	No
SPX(4)	Yes	No	Yes	No
SPX II	Yes(5)	Yes(6)	Yes(7)	No
TCP/IP	Yes	Yes	Yes	Yes
X.PC	Yes	Yes	Yes	Yes

Footnotes

¹ Do not install a Domino server on a Domain Controller. The processing of NT domain logons by Domain Controllers can consume large amounts of processing resources, especially for larger domains, and thus can affect Domino server performance. If the Domino server is to be within an NT domain, the server should be a member server within the domain.

² Only Microsoft NetBEUI is supported.

³ Only Microsoft TCP/IP is supported.

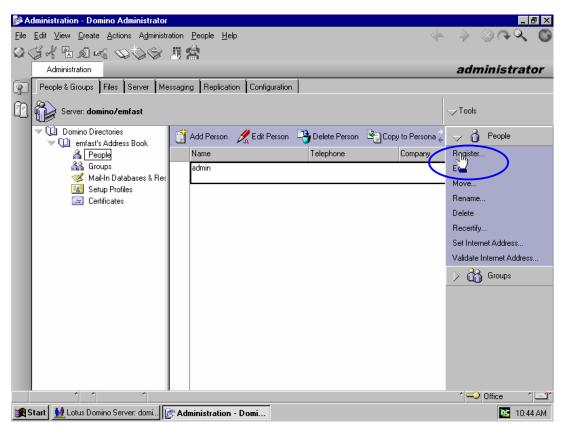
- $4\ Domino\ clusters\ and\ partitioned\ server\ configurations\ do\ not\ support\ the\ IPX/SPX\ protocol.\ At\ this\ time,\ Lotus\ does\ not\ plan\ to\ provide\ IPX/SPX\ network\ support\ for\ future\ releases\ of\ these\ features.$
- 5 Using ipx.case file sets and IBM AIX Connections.
- 6 Using TotalNET Advanced Server and Solaris PC Protocol Services.
- 7 Using Microsoft's NWLink IPX/SPX stack.

Step 1: Creating a Lotus Notes User Account for Faxing.

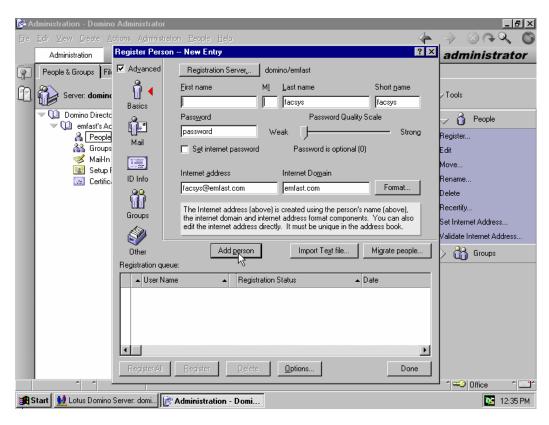
You will need to be running the Domino Administrator for the following instructions.

 Launch the Domino Administrator, Select: People & Groups -> People -> Tools -> Register Person

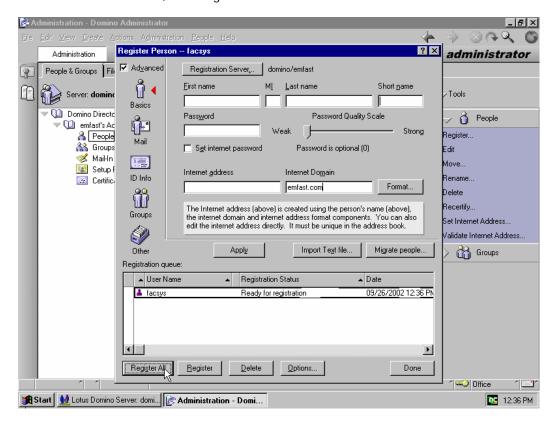
Leave the default settings and continue, fill in the details as in the following screen shots:



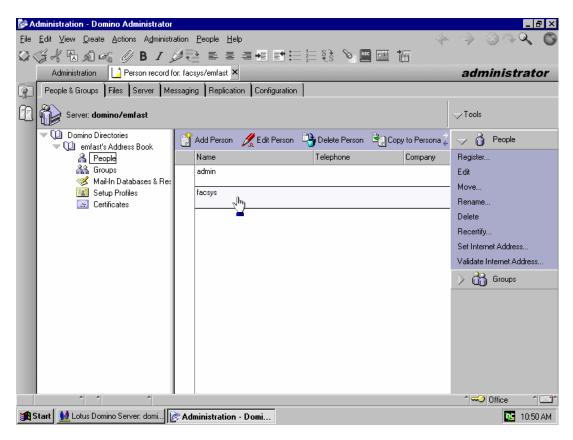
- 2. In the Register Person New Entry Screen complete the following:
 - a. Registration server = <<the name of your Domino Server>>
 - b. Last name = <<any name you want>> for example facsys
 - c. Short name = the same as you entered in Last Name
 - d. Password = <<any password you want>>
 - e. Leave the defaults for Internet address and Internet domain



3. Next Click Add Person, then Register All:

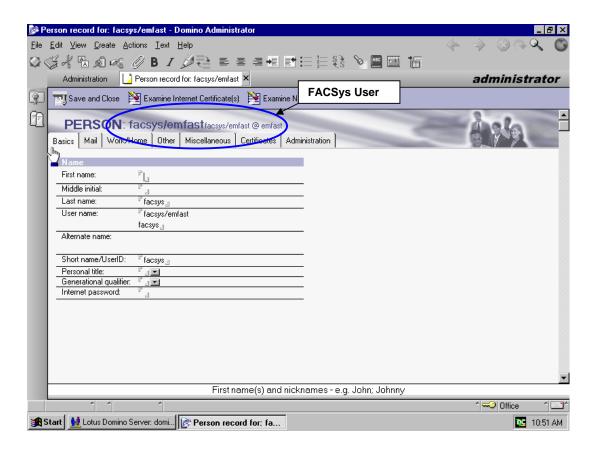


Next you will need to edit the new user by clicking on the user (in this case facsys):

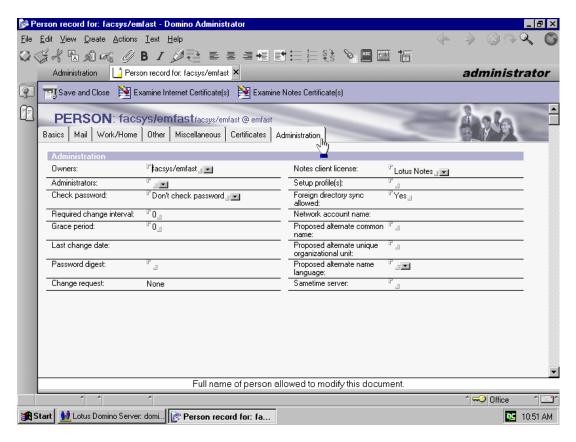


Be sure you have the following settings under Basic and Administration Tabs as shown in the screen shots below:

5. Navigate to the Basics Tab. Be sure to fill in the information under the Basics and Mail fields as shown below.



Navigate to the Administration Tab. Be sure to fill in the information as shown below.

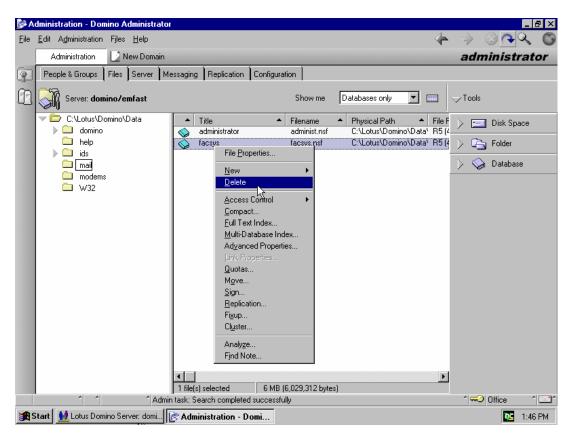


Be sure to Save and Close any changes in these settings.

Step 2: Creating a Lotus Notes Database for Faxing.

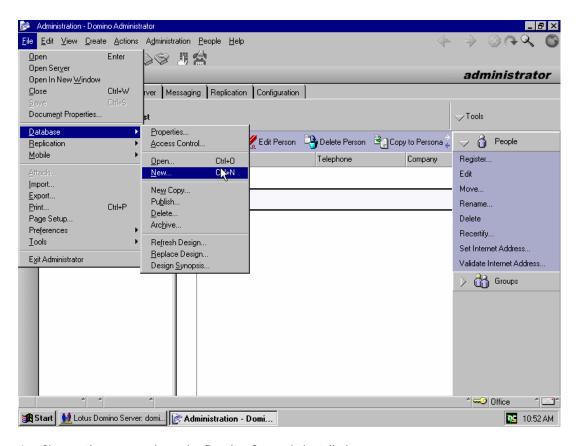
To create the Lotus Notes Database, follow the instructions below: From within the Domino Administrator select Files and go to the Mail folder under Domino's database folder

Note: If a database is already in place you will need to delete it. Depending on the settings on your Domino server, a mail database may be created when a new person is registered. To delete the database, right click on the database name then choose "Delete".



1. From within the Domino Administrator select:

FILE -> DATABASE -> NEW



- 1. Choose the server where the Domino Server is installed.
- 2. Add Title and File Name (do not use Local)
- 3. Enable the Show Advanced templates check box.
- 4. Enable the Inherit future design changes

Example:

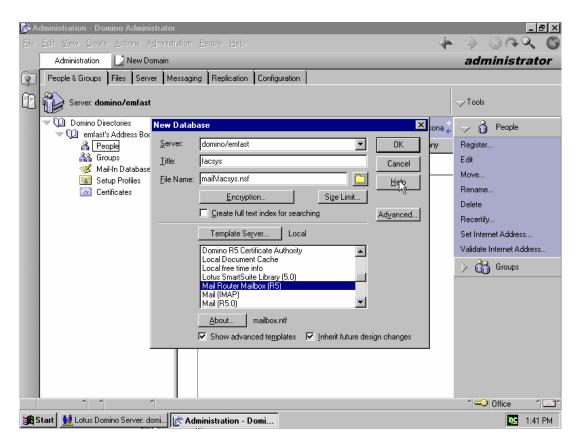
Server: <<the name of your Domino Server>>

Title: <<the same as the name you entered for the user in Step 1>> - ex "facsys".

Please make sure you enter the same name for filename.

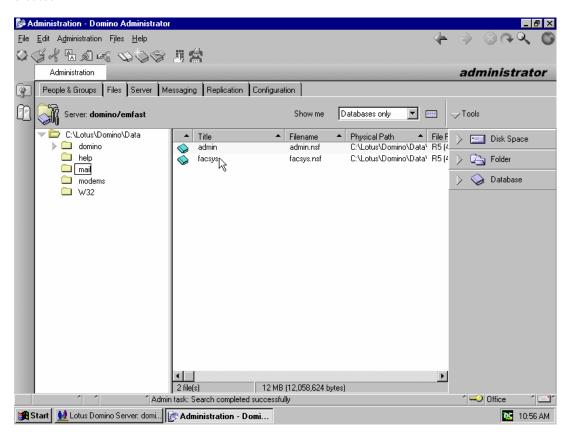
Filename: mail\facsys.NSF (Make sure the .NSF extension exists)

Within the templates make sure that you select: "Mail Router Mailbox (5)" (the number between brackets may be different depending on your Domino server version)

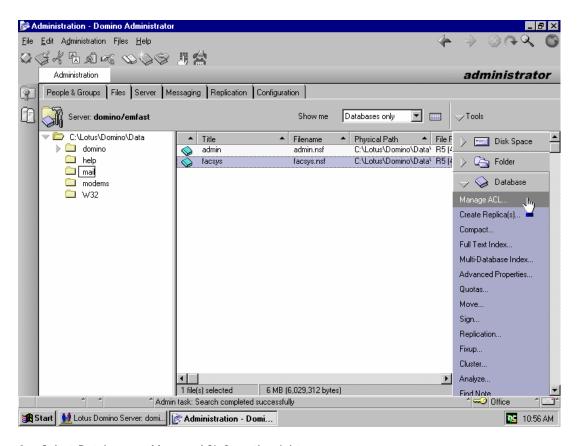


5. And then click OK to save all settings.

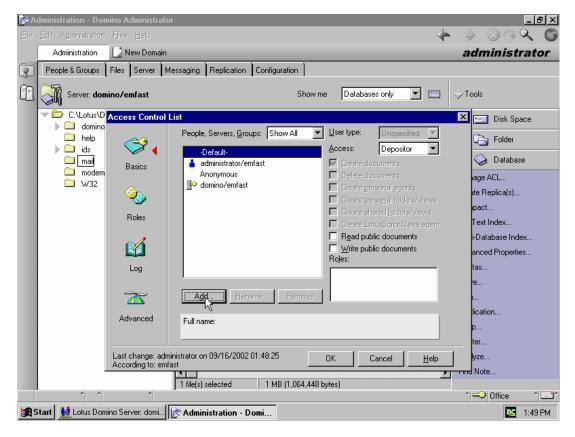
Next, the Access Control will need to be modified within the new database you have just created.



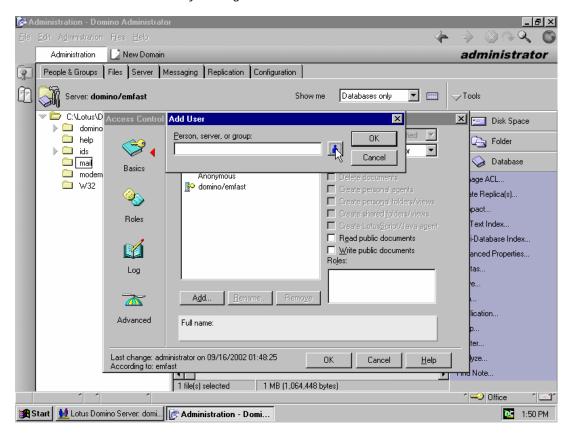
1. Highlight the newly created database (in this case facsys)

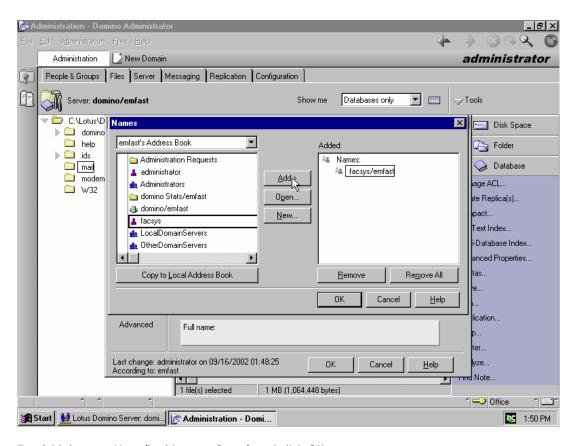


2. Select Database -> Manage ACL from the right menu.

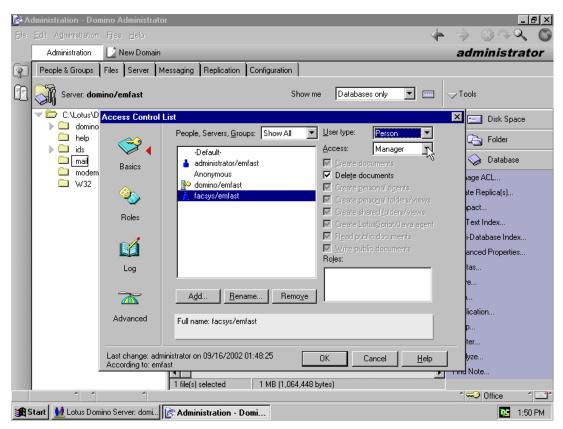


- 3. Click on Add.
- 4. Then browse for the user by clicking on the icon in the Add User Screen as shown below:





5. Add the new User (in this case facsys) and click OK.



1. In the Access Control List screen highlight the new user and configure the following settings:

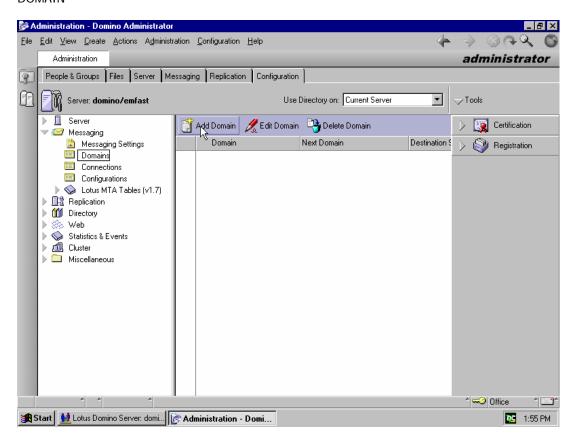
User Type: Person Access: Manger Enable Delete Documents

2. Then select OK to complete the Database creation.

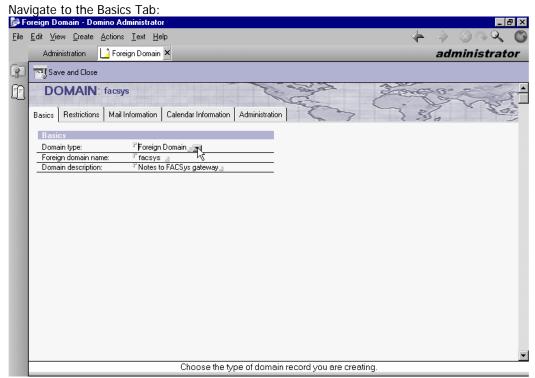
Step 3: Creating a Foreign Domain

To create a Foreign Domain you will need to be running the Domino Administrator to follow the following instructions.

From within the Domino Administrator select: Configuration \rightarrow DOMAINS \rightarrow ADD DOMAIN



You should then configure the domain as follows:

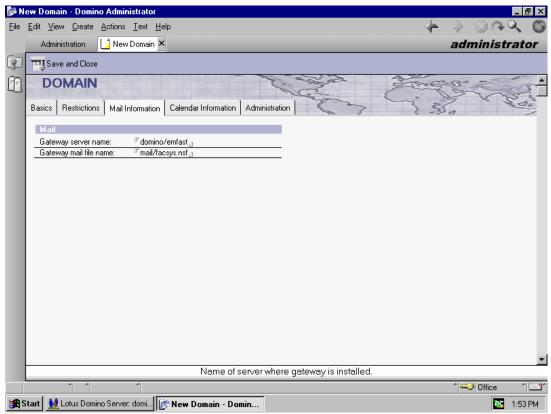


DOMAIN TYPE: Foreign Domain

FOREIGN DOMAIN NAME: <<Same as the username>> - facsys in this case DOMAIN DESCRIPTION: <<Any description you want>> - ex. Notes to Facsys

gateway

Add the following details Mail information Tab

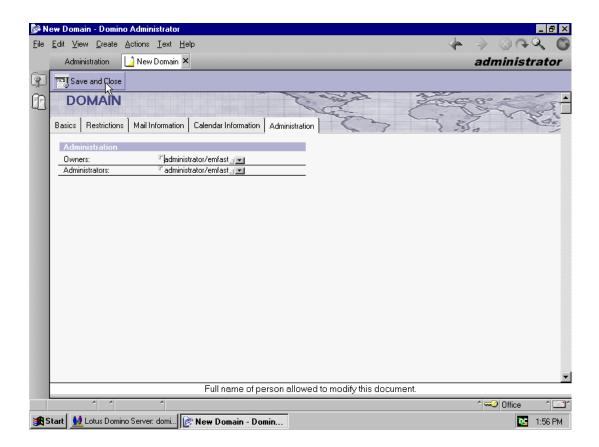


GATEWAY SERVER NAME: << the name of your Domino Server>>

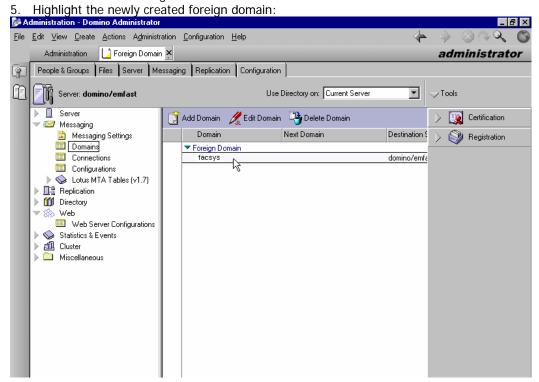
GATEWAY MAIL FILENAME: <<th>ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created in step 2>> - ex. 1/6 | Along the database you created you created in step 2>> - ex. 1/6 | Along the database you created you

mail/facsys.NSF

3. Next click on Save and Close to save your settings:

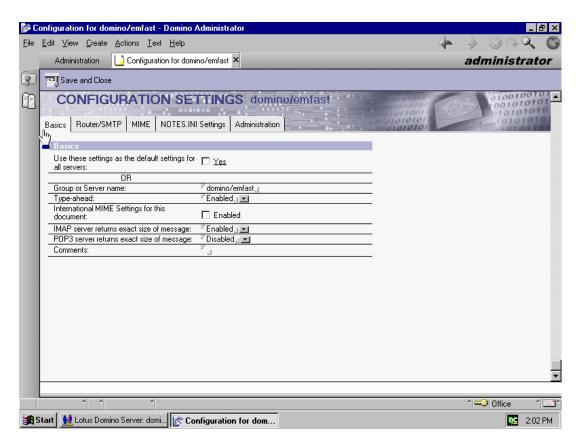


4. Next Click on the Configuration Tab



Finally, verify that the configurations exist for the Domino server as shown below in the two screen shots. If they do not exist you will need to add the information manually under Configuration Settings tab > Basics tab.

6. Under the Basics tab ensure the correct Configuration Settings have been enabled.



7. Then select SAVE and CLOSE to complete the Foreign Domain creation.

Step 4: FACSys Fax Server Configuration

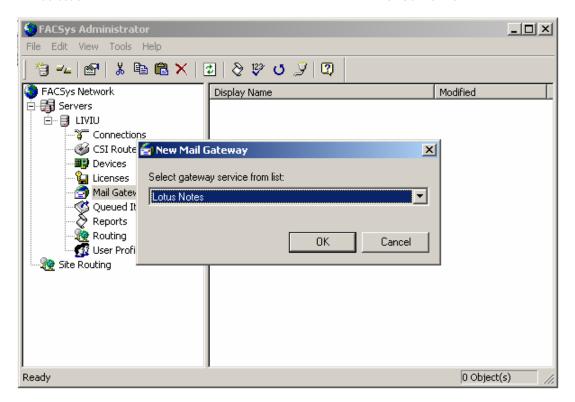
Before proceeding with the following configuration steps, be sure that you have the Lotus Notes client installed on the FACSys server. See <u>diagram</u> on page 5 of this manual. In addition, a FACSys client license is needed for each Lotus Notes user accessing the FACSys system. See licensing agreement at the beginning of this manual.

Please open the Lotus Notes and login with the user created in step 1. You may close the Lotus Notes client then but do not login with another account, otherwise the gateway will stop working.

Before configuring the Lotus Notes gateway, you will need to create a Lotus Notes Gateway. Using the FACSys Administrator program, do the following:

- 1. Launch the FACSys Administrator program.
- 2. Connect to the FACSys Server name and select:
- 3. Right mouse button:
- 4. Selection:

GATEWAYS NEW MAIL GATEWAY LOTUS NOTES



Configure the Lotus Notes Email Gateway in FACSys as follows (see diagrams):

GENERAL menu tab configuration:



NAME: FACSYS (same as the user and foreign domain name you created)

DISPLAY NAME: << Any description you want>> - ex. FACSys connection to Notes

Gateway Services Check boxes:

Enable this Gateway for service

Process outgoing messages every 1 minutes

Allow messages to be received by this gateway

Cover Page Options Check Boxes (optional)

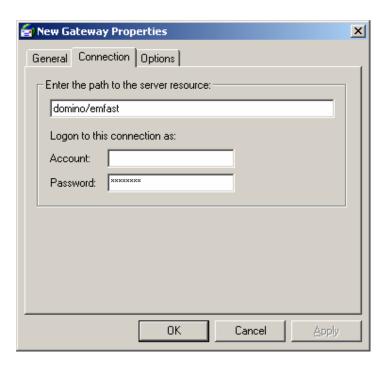
Enable Use a cover page when sending from this gateway

Enable Always place the message body on the cover page

Step 4: FACSys Fax Server Configuration (cont.)

CONNECTION menu tab configuration:

NOTE: In the example below **domino/emfast**: **domino** is where the Domino Server is installed and **emfast** is the domain.

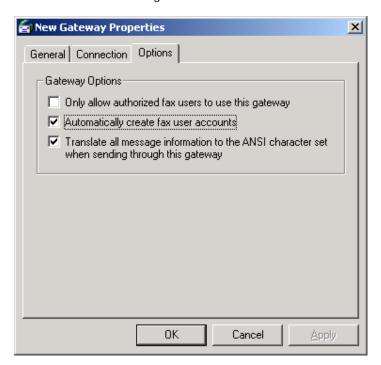


Path: <<Domino server name/domain>>

This can also be a server name or an IP address

Account:<<leave blank as this is set-up in the Lotus Notes client on the FACSys server>> Password:<<The password that was configured for the user account on Lotus Notes>>

OPTIONS menu tab configuration:



Then select the OK button to add the gateway to the FACSys server.

NOTE: At this point, you should check the NT EVENT VIEWER from within the NT Administration Tools or run: EVENTVWR.EXE. Under the application event logs if there are any problems establishing a connection to the Notes server from FACSys a YELLOW warning will appear for the FAXSERVER service. The information within this error should pinpoint any configuration issues.

Step 5 Setting the Path for Notes.ini

NOTES.INI is a customizable settings file that contains information about your use of Notes. Your NOTES.INI file is stored in your Notes program directory, unless you have a shared installation, then it is stored in the Windows directory. In order for Notes to run, the NOTES.INI file must be in the search path.

The Notes.ini (corresponding to Lotus notes Client) is usually found in C:\Lotus\Notes (for Notes R5) or C:\ Program Files\Lotus\Notes (for Notes R6.x)

The user has to set the path for this file. This is done by setting the Environment Variables (under system variables) to point to the location of the directory that contains the Notes.ini file. The user will need to add the directory pointing to notes.ini to the path.

Open System Properties > navigate to Environment Variables (the tab "Advanced" for Windows 2000, 2003 or XP). Under System Variables, Edit 'Path' and add the directory that contains the Notes.ini file.

Example: C:\Program Files\Lotus\Notes.

If this is not listed, then add this in the Path.

Updating this Path will take effect only after rebooting your FACSys server.

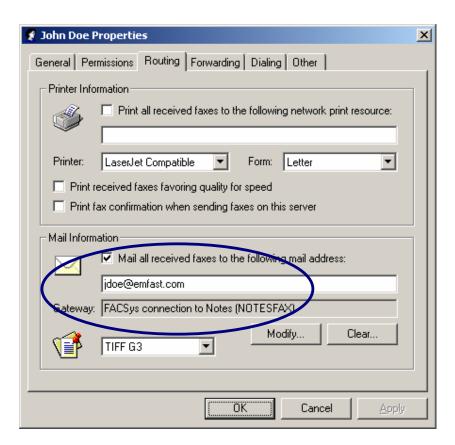
Step 6: User Profile settings for Lotus Notes users

For any User Receiving Faxes on Lotus Notes client change the following User Profiles settings in the FACSys Administrator program.

Launch the FACSys Administrator program > User Profiles > click on the User Profile.

Click on the Routing tab and complete the Mail and Gateway information as highlighted below:

1. Fill in the Mail information as shown below.



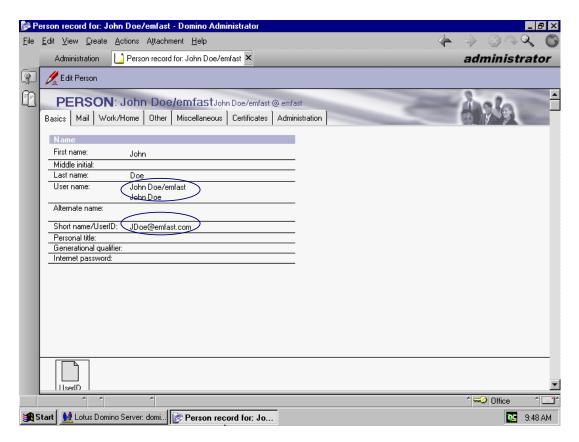
2. Click on Modify to select the Gateway:



- 3. Then Click OK to save and close the gateway selection.
- 4. Click OK to save and close the User Profile new Routing settings.

The diagram above is an example for the configuration of a Lotus Notes profile within the FACSys Administrator/Users. You may use for the email address:

- The e-mail address configured under user properties in Domino Administrator. Example: "JDoe@emfast.com"
- The Domino user name. Example: "John Doe/emFAST" (See the screenshot below)



The Mail Received faxes option should be checked and the path to the Notes Account/Notes server and Domain should be entered accordingly. It is best to enable the Auto Creation option of accounts to begin with mentioned earlier in the document. This will make sure all configuration settings are set correctly.

You should preferably set the Received image format to TIFF G3 as well; some Notes Client Viewers have exhibited problems with TIFF G4.

Step 7: Addressing Fax Messages in Lotus Notes

FACSys destinations can be added to personal address books, the public Name & Address database or while creating a fax message.

When addressing messages to fax recipients from Lotus Notes, you may enter the address in the form of:

Username@faxnumber@foreigndomain

Example: Jane Doe @555-1234 @facsys

When attaching a Microsoft Word RTF, or graphics, or embedding tables file within the body of the message you will need to modify the registry key shown below:

Open Regedit > Hkey_Local_Machine > Software > Optus > ImageLibrary. Here you will need to create a WordRtf value. To do this: right click white space in right frame > New > DWORD Value. Type in WordRtf with a value of '1'.

When attaching a document, the attachment is on a separate page after the cover page.

Step 8: What Happens When a User Sends a Fax From Notes?

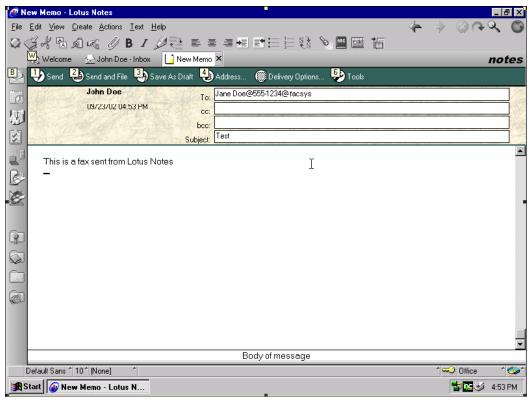
==>> A Notes user sends an e-mail message addressed TO: Jane Doe @555-1234 @facsys

- ==>> The message is routed to the Lotus Notes Server and Router
- ==>> Because the message has a FAX type address, the message is sent to the facsys.NSF (mailbox)
- ==>> The message is routed to the FACSys server (with Lotus Client installed)
- ==>> The FACSys server schedules the outbound fax for transmission

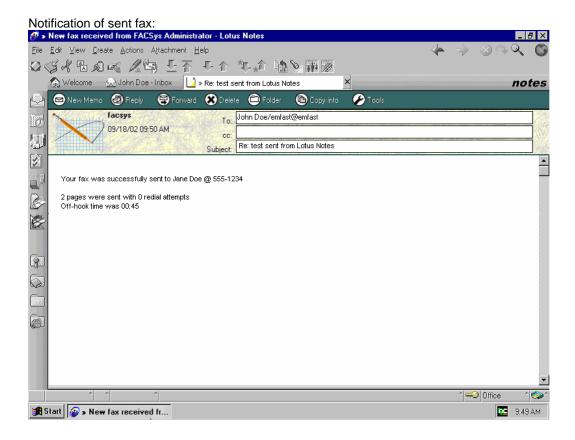
Below are examples of sending a fax from Notes:

From the Lotus Notes Client:

- 1. Open a New Memo
- 2. Fill in the TO: field using the fax syntax.



- 3. At this point, you may choose to
 - i. Send
 - ii. Send and File
 - iii. Save as Draft
 - iv. Address
 - v. Select Delivery Options
 - vi. Choose Tools
- 4. After Sending the message, you will receive a email Notification similar to the example below:



Step 9: How Does a FACSys User Receive Inbound Faxes in Notes?

To have FACSys route a user's inbound faxes to their Notes inbox, you must modify the user's FACSys User Profile as follows:

With FACSys 4.7x and Later

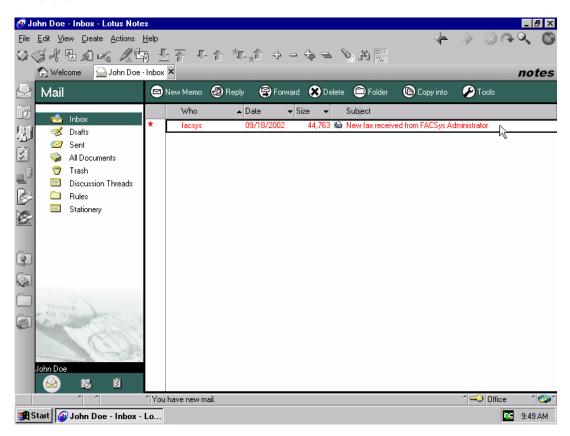
Enable the user's routing and forwarding options: See <u>Step 6</u> for screen shots.

In FACSys 4.7x, the option "Enable Inbound Routing Services" is on the General tab
of the user's FACSys profile.

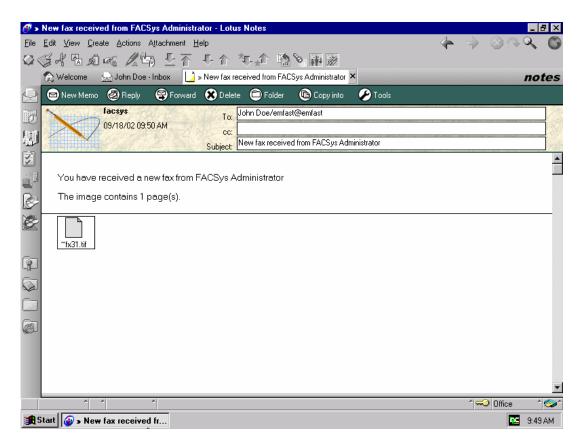
On the Routing tab of the user's FACSys profile, define the Mail Configuration fields as follows:

- Check the option "Send all received faxes to this profile's mail account."
- In the Mail Address field, specify the mail address to which the user's inbound faxes should be sent. For Lotus Notes, enter the address using the syntax: User'sNotesMailboxName. If you leave the Mail Address field blank, FACSys will attempt to find the user's mailbox via the user's FACSys logon name and full name.
- In the Attachment field, select the format into which the inbound fax files should be converted (none, TIF or DCX). Select an image format associated with an application to which the user has access. All faxes received by the user will be converted to the selected file format. The user must have the ability to "open" the attachment. The 'None' selection will exclude the attachment from the message.
- You should preferably set the Received image format to TIFF G3 as well; some Notes Client Viewers have exhibited problems with TIFF G4.

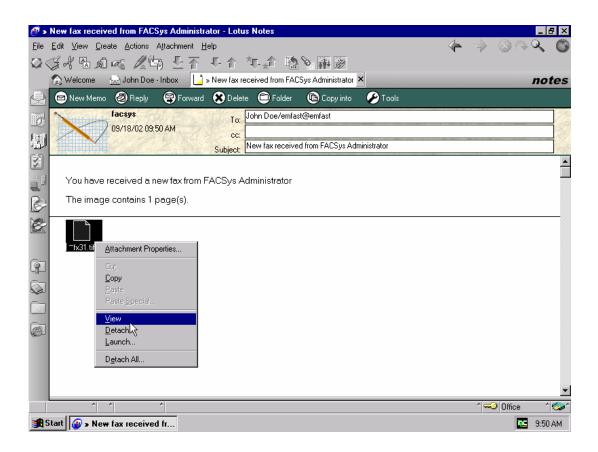
Below is an example of a notification for a received fax message through Lotus Notes Client:



Below is an example of opening up a received fax within the Inbox. This is done by clicking on the new memo:



To view the fax you will need to right click on the .tif file and click on View as shown below:



Step 10: Testing Your Configuration

To verify and test your FACSys/Notes integration, perform the following tests:

- You must make sure that the FACSys server has been installed and configured correctly for the following configuration to work correctly. You should make sure that the Optus Fax Server service and the Optus Fax Device Manager service have been associated to a Windows NT User Account that has both Administrator and Domain Administrator privileges.
- To ensure that Lotus Notes is working properly, send an email message from the Notes client installed on the FACSys fax server. Verify that the message is sent successfully.
- To ensure that the Notes foreign domain is configured correctly, send a fax message from a Notes client and verify that the fax message can be seen in the <Notes_messagefile>.nsf "sent" folder.
- To ensure that FACSys is working properly, send a fax message from a FACSys client. Verify that the fax is sent and appears in the FACSys Sent Items folder.

Step 11: Troubleshooting

If you are having trouble sending or receiving faxes through Lotus Notes, please check the following:

 Make sure the Microsoft NT user account that the Optus Fax Server service is logging in as has Admin and Domain Admin rights. For Novell networks, the same user must have an account on your Novell file server with the same name

- and password.
- Issues with the Optus Fax Server Service, routing, and sending events from Notes will all be reported in the Windows NT Event Log located at the FACSys server.
- The latest version of VIMGET32.EXE for FACSys 4.7SP4a is provided with the documentation (and is already part of FACSys 4.8) and VIMPUT32.EXE is included with FACSys 4.7 SP4a and later. The latest versions of Lotus' VIM32.DLL and VIM.DLL are also available for download from the Lotus web site at http://www.lotus.com.
- Download the latest dual-mode for VIM files (e.g., VDLW32.ZIP and VDLWIN.ZIP). Lotus recommends that you use their 32-bit DLLs on the server for both 32-bit and 16-bit clients. The updated files should resolve routing and memory issues.
- 5. After copying the new files, make sure that there are no older copies of the DLLs anywhere on the system.
- 6. Problems installing the Lotus Notes client on the FACSys fax server may be caused by conflicting drivers and common control libraries supplied with FACSys, Lotus Notes, Windows 2000/XP, and Internet Explorer. When there are conflicting files on the fax server system, the Notes installation program will not complete successfully (perhaps hang or disappear from the screen).
- International sites should consider installing the International Notes Server and Client software available from Lotus.
- 8. International sites have reported an issue related to special, national (8-bit) characters when FACSys user profiles are automatically created by sending a fax from Notes. If the international characters are not being translated properly in the FACSys user profile, enable the "ANSI character translation" option provided with the release of FACSys 4.7 or higher ANSI character translation is now a controllable feature for each and every gateway. The new option is located on the gateway's Options tab. Enabling the option "Translate all message information to the ANSI character set" instructs FACSys to translate all messages and fields before sending faxes via the gateway.
- 9. If you are having problems sending fax messages from Lotus Notes, add the <Notes_messagefile>.nsf file to the Notes client desktop installed on the fax server (make sure you have sufficient rights to the gateway database). Do not open any jobs, but verify that you can view the jobs being submitted by Notes users.
- 10. The FACSys fax server uses the VIM interfaces and DLLs to access the Notes message file (*.nsf) and uses the credentials associated with the Notes client installation on the fax server computer. Therefore, if you cannot access this file from the Notes client, then the fax server also will not be able to access this file and the problem lies in your Lotus Notes configuration. If you can access this file from the Notes desktop, then verify your fax server configuration.

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