

Batch Faxing from IBSWIN

IBSWIN provides a simple way to batch fax Work Orders and Options PO's to your subcontractors. Although there are only a few minor setup requirements in IBSWIN, the initial setup of Zetafax can be tricky especially over a network or in a Citrix/Terminal Services environment. The purpose of this document is to guide you through the installation and basic setup and configuration of Zetafax for use with IBSWIN. There are many other useful features in Zetafax that are outside the scope of this manual. For additional information on any of the sections of this user guide please refer to the Zetafax documentation that came with your software.

Note: Out of the box Zetafax allows one modem to be configured for faxing with up to 5 users/workstations to fax from that one modem.

Table of Contents

Installing Zetafax	2
Configuring Zetafax	2
Setting up your Modem	2
Setting up Multiple Workstations	3
Creating Multiple Users	3
Setting up a Workstation	3
Configuring the Client Workstation	3
IBSWIN Setup and Configuration	4
Configuring Fax Modem Com Port	4
Subcontractor Fax Numbers	4
Batch Faxing from within IBSWIN	5
APPENDIX 1 – Using Zetafax in an application server environment	6
APPENDIX 2 – Zetafax with terminal services & Citrix Metaframe	8

Installing Zetafax

The initial installation of Zetafax is the same whether you are using it on one computer or on multiple workstations.

When choosing the computer from where you will fax make sure that it has a dialup fax modem installed with a phone connection. This will need to have the fax server software installed on it will be known as the Zetafax server.

To begin the installation process, insert the Zetafax CD and wait for the main installation screen to open. If it does not open automatically go to **Start: Run: Browse** in windows and select the CD drive to run the **runme.exe** file. When given the option select to install Zetafax. The screen pictured (right) will open. Install the *fax server* using the **Full Server Installation** option. Then continue through the installation screens and enter your license and contact details, etc, as prompted. *Please refer to the Zetafax Software Guide (pages 24-37) for assistance.*

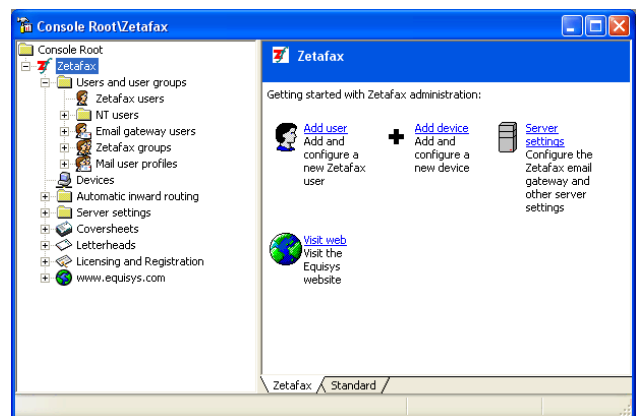


Configuring Zetafax

Next you will need to configure any network printers or fax modems for use with Zetafax. You may be prompted to do this during the initial installation otherwise you can do this from **Start: Programs: Zetafax: Zetafax Configuration** within in windows. This menu item will only be available on the computer designated as the Zetafax server.

Setting up your Modem

To setup your modem select **Add Device** in the configuration screen pictured on the previous page. A window will open listing your currently configured devices at the bottom and a drop down list at the top. To add a modem select the drop down list and pick the modem applicable for your Zetafax server. Once you select the applicable modem a new window will open where you can enter additional about your modem including the Com Port.



Note: If you do not know which modem is installed in your computer and on which com port you can find out by going to the control panel in Windows and selecting **Phones & Modems**. Under the **Modems** tab it will display the modem name and next to it the port. If you cannot find your modem in the drop down list then select the **Generic Class 1 or 2 fax modem**.

Setting up Multiple Workstations

To setup multiple workstations for use with Zetafax you will first need to create additional user accounts on the Zetafax server, run the client setup files from the workstation/s, and finally configure the workstation/s for faxing. These steps are outlined below.

Creating Multiple Users

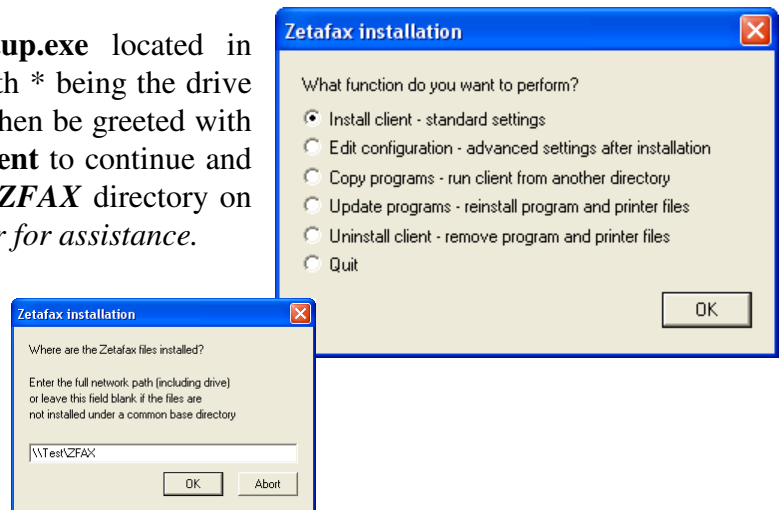
In the main configuration screen (pictured on the previous page and found under **Setup: Programs: Zetafax: Zetafax Configuration** in windows) select **Add User**. Then, when prompted, enter the user name to be used for the new account. After selecting **OK** you will be forwarded to the user setup screen where you will need to enter the full name of the user. No other settings need be altered.

Setting up a Workstation

To set up a workstation you will need to map the **ZFAX** directory (C:\ZFAX by default) from the Zetafax server to the new workstation and assign it a drive letter. Please call your system administrator for assistance. Once a drive has been assigned this drive should contain the following Folders: **Request**, **Server**, **System**, and **Users**. If these are visible then you are ready to run the **Workstation Setup** program.

Once the mapping is complete, run **Wksetup.exe** located in ***:\ZFAX\SYSTEM** from each workstation (with * being the drive letter pointing to the Zetafax server). You will then be greeted with the menu pictured to the right. Select **Install client** to continue and when prompted enter the network path for the **ZFAX** directory on the server. *Please ask your network administrator for assistance.*

Upon completion you will be returned to the main menu. From here you will be able to configure the client installation.



Configuring the Client Workstation

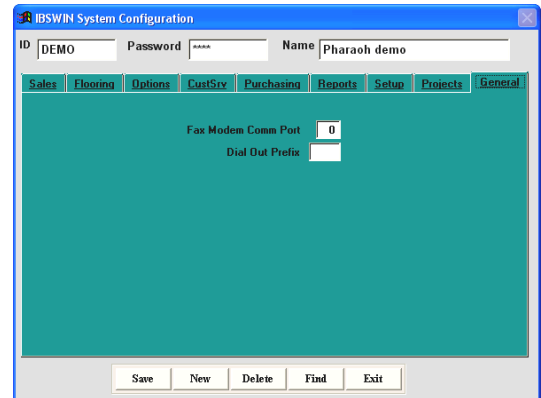
If you have just completed the client installation you will already have the client setup menu open, otherwise go to **Start: Programs: Zetafax: Workstation Setup** in windows. Select the **Edit configuration** option. You will then be presented with three options to determine the user name to be used on this workstation. Select the third option **Neither of the above** and enter the user name that was setup for this workstation on the Zetafax server and follow the prompts without making any changes. Exit the client setup menu once you return to it.

IBSWIN Setup and Configuration

Configuring the Fax Modem Com Port

The first item to configure in IBSWIN is the modem port. By going to **Setup: Setup Users: Edit** and then selecting the **General** tab you will be able to enter in the port number under which your modem is configured and also enter any **Dial Out Prefix** if you have one.

Note: If you do not know which port your modem is connected to you can find out by going to your control panel (in Windows) and selecting **Phones & Modems**. Under the **Modems** Tab it will tell the which Com port your modem is connected to.



Subcontractor Fax Numbers

IBSWIN has a database of subcontractors with whom you do business with. In order for Batch Faxing to work correctly you will need to make sure that the fax number of each subcontractor is entered correctly.

To add, change, delete, or list all the subcontractors on file, choose **Setup: Subcontractors** and select whether you want it sorted by **Name** or **Trade** sequence. Then enter the details as needed. For more information on the subcontractor screen and its importance please refer to our **Setup and Configuration User Guide**.

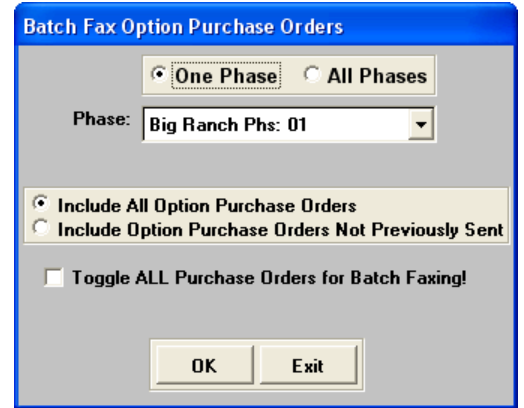
State	Zip	Contact	Phone	Fax
CA	91313			
CA	91651	KEN ROSS	(714)516-5151	(714)516-7871
CA	91651	KEN ROSS	(714)516-5151	(714)516-7871
CA	91651	KEN ROSS	(714)516-5151	(714)516-7871
CA	91451	GEORGE BREN	(818)988-1717	(818)771-6616
CA	91451	GEORGE BREN	(818)988-1717	(818)771-6616
CA	92341	BOB GAINS		
CA	92341	BOB GAINS		
CA	91321	RON GREEN	(949)817-7161	(949)817-7611
CA	92612	BILL BERKUS	(949)261-7171	(949)261-9981
CA	95414	HARRY GREER	(415)717-7117	(415)817-7171
CA	95414	HARRY GREER	(415)717-7117	(415)817-7171
CA	92091	RON GREER	(714)561-5587	(714)998-1001
CA	91881	BOB FREED		

Batch Faxing from within IBSWIN

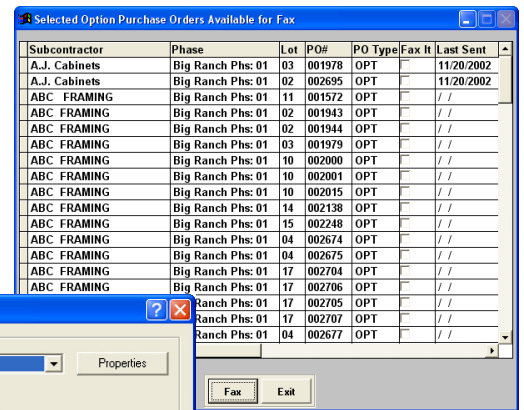
Before attempting to fax from IBSWIN you need to make sure that you have the Zetafax Client software running from the workstation, and the Zetafax Server application running from the appropriate computer. You cannot fax without these programs running in the background.

Sending faxes from within IBSWIN is as simple as printing any of the reports included in our system, however batch faxing is only available in the *Options Plus* and *Customer Service* modules.

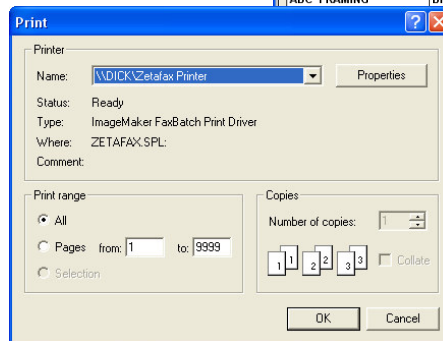
When going the main menu of either module you will see that the last menu item is dedicated to the batch faxing. From Options you can fax your *Options P.O.'s* and from Customer Service your *Work Orders*. Selecting either of these will open the window pictured to the right. Here you are offered various options to narrow down your list of subcontractors to fax to.



Once you have selected your criteria click on **OK** and for a new window to open. Listed will be a list of subcontractors based on your criteria. Select the P.O.'s or Work Orders to be faxed by checking the appropriate field in the *Fax It* column. When you have completed your selection, select the **Fax** button. The printing dialogue box will now open.



Before printing make sure that you select the Zetafax Printer using the properties button before hitting **OK**. Once a fax has been sent the send date will be recorded in the *Last Sent* column.



Appendix #1

Using Zetafax in an application server environment

The Zetafax client can operate in a multi-user application server environment allowing network users to send and receive faxes using software installed and running on an application server. This integration allows the Zetafax client software to operate seamlessly in an application server environment under Microsoft Windows 2000 Terminal Services, Microsoft Terminal Server for Windows NT 4.0, Citrix MetaFrame and Citrix WinFrame.

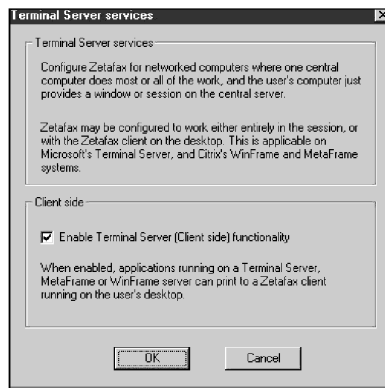
Simpler deployment

When used in an application server environment, Zetafax makes it simpler for network administrators to provide company-wide faxing capabilities to users on the LAN, to remote users and to branch offices.

By running the Zetafax client installation program (WKSETUP) one time on the application server computer, the network administrator can deploy the Zetafax client on each user's desktop.

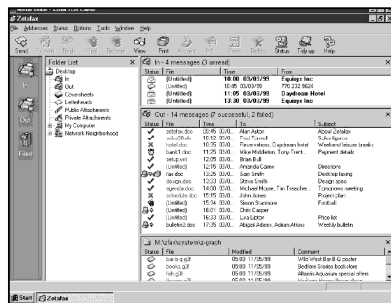
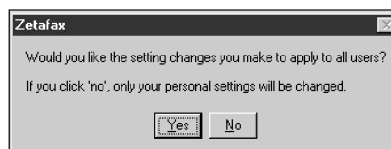
Each time a user logs on to a terminal server session, the user will be able to use the copy of the Zetafax client on the application server, if a Zetafax account has already been created for that user.

By upgrading the Zetafax client software on the application server, each Zetafax user sharing the software on the application server automatically runs the latest version, eliminating the need to upgrade every desktop within the company. Network administrators no longer need to worry about whether or not users are running the latest version of the Zetafax client software.



Application server integration at a glance

- **Submit faxes from applications running in a Terminal session as well as from applications running locally**
- **Simple to deploy company-wide by installing the client software once on the application server computer**
- **Provide faxing capabilities to remote users and users in branch offices**
- **Central management and deployment helps reduce overheads during installation and upgrading**
- **Mix and match - run the Zetafax client on thin and rich clients within your organization**
- **Cross platform support using Citrix ICA client**



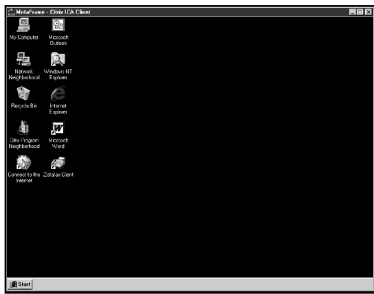
Easy account configuration

The network administrator can quickly enable user accounts on the network to send and receive faxes using the Zetafax client. Simply highlight a list of names from the Primary Windows NT user domain list in Zetafax and click Enable.

Zetafax will create new Zetafax accounts for names highlighted in the list. Each user can have their own personalized settings for the Zetafax client as well as private in-boxes and out-boxes, which can be protected by using file server permissions.

Cross platform support

Using MetaFrame and the Citrix ICA client, the Zetafax client can be used in an application server session on a wider range of operating systems such as Macintosh, UNIX, Handheld PCs and Network Terminals.



Technical specifications

Windows 2000 Terminal Services

Windows 2000, Windows NT, Windows 95/98, Windows 3.11 (Workgroups), Windows CE, Microsoft Internet Explorer 5.x

Microsoft Windows NT 4.0, Terminal Server Edition

Windows NT
Windows 95/98
Windows 3.11 (Workgroups)

Citrix MetaFrame XP

Windows 2000, Windows ME, Windows NT, Windows 95/98, Windows 3.11 (Workgroups), Windows 3.1, Windows CE, DOS
IBM OS/2 Warp
Macintosh (Motorola, PowerPC)
Browser - Internet Explorer
Browser - Netscape
Java JDK 1.1 or above compliant platform
EPOC
UNIX - Solaris/Sparc, Solaris/x86, SunOS, Compaq Tru64- (formerly Digital UNIX), HP/UX, IBM, SGI, Linux, SCO

Citrix MetaFrame 1.8

Windows NT, Windows 95/98, Windows 3.11 (Workgroups), Windows 3.1
Windows CE, DOS
Macintosh (Motorola, PowerPC)
Browser - Internet Explorer
Browser - Netscape
UNIX - Solaris/Sparc, UNIX - Solaris/x86, UNIX - SunOS, UNIX - DEC, UNIX - HP/UX, UNIX - IBM, UNIX - SGI, UNIX - SCO, UNIX - Linux (Red Hat, Caldera, SuSE, Slackware)
Java JDK 1.0 or above compliant platform
DirectICA/MVGA, RISC OS, PSOS, NCI OS, Net OS, QNX OS

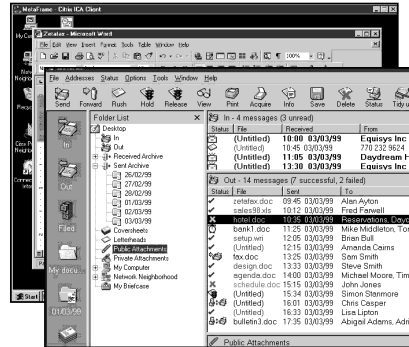
Application servers

Microsoft Windows 2000 Terminal Services
Microsoft Windows NT 4.0, Terminal Server Edition
Citrix WinFrame 1.8

Please note that embedded addressing is not supported in an application server environment

Easy to use, wherever you are

Using a Zetafax client on an application server, network users can be fax enabled in branch offices or at remote sites. Remote users can utilize Zetafax using existing thin client sessions over a wide area network or even remote access.



Support for mixed desktop environments

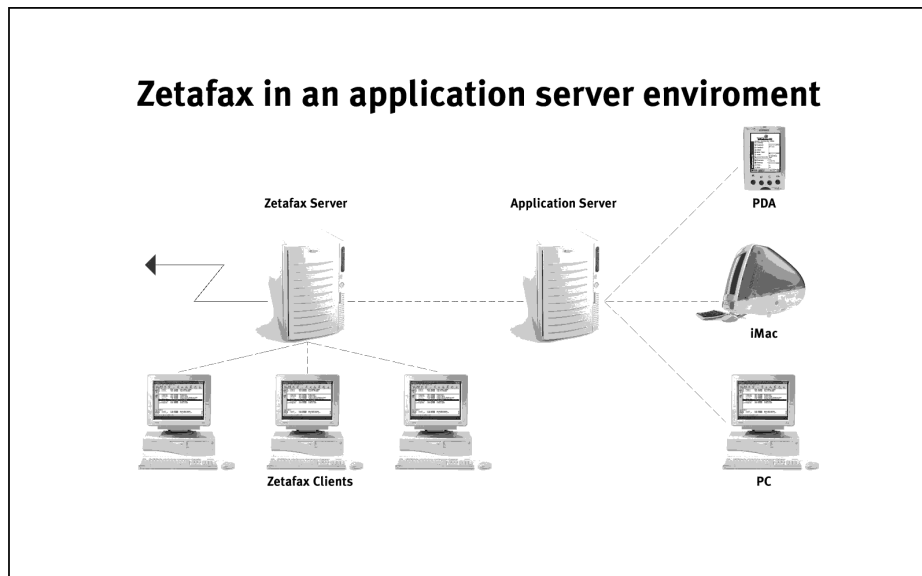
The Zetafax client can work seamlessly in a mixed desktop environment, where users run applications both on their local computer as well as on an application server. By installing the Zetafax client on the local computer, it is possible for users to submit faxes from an application that is run from an application server client, as well as from an application that is running locally.

Recommended set-up

When using a Zetafax server in an application server environment you should configure Zetafax in the following manner:

Zetafax server: install the Zetafax server on a dedicated server PC which is not the application server

Zetafax client: install on the server-based computing operating system that acts as the platform on which client and "user" applications are typically run. The client can also be installed directly onto desktop computers to support a mix of "thin" and "rich" clients.



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APPENDIX 2 - Zetafax with terminal services & Citrix Metaframe

This Zetafax technical note applies to:

Zetafax 7.00.0.26

Windows 2000 server (including the Citrix Metaframe 1.8/XP add-ons)

Summary

This document details how to deploy Zetafax in a Windows 2000 terminal services application server environment, and gives details of configuring Zetafax when using the Zetafax client and application within the terminal session.

Note: Equisys do not recommend that the Zetafax server program is installed and run on the application services computer, but rather on a separate computer accessible via a network share.

More information

The Zetafax client can be configured so that users can print, address and send a fax from an application in a terminal services session using the Zetafax client in the same session. Once the Zetafax server has been installed and configured on a computer, it must be updated using the terminal services client update (ZFW2KTS_700343.EXE). This is available on the Equisys web site www.equisys.com/updates as a separate download for Zetafax 7 users.

Once the update has been applied you must install the Zetafax client on the terminal services server so that the Zetafax printer is available in the terminal session for users to *Print to Fax*.

Installing the Zetafax Client:

1. Log onto the application server as the network administrator and run **wksetup.exe** from the `*:\ZFAX\SYSTEM\` directory where * is the mapped drive where the Zetafax files are installed.
2. Select **Install client - standard setting** and click **OK**.
3. You may now be presented with a dialog box asking whether you want the setting changes to apply to all users or just the user you are currently logged on as, click **Yes** so that all users will be able to use the Zetafax client. If you are not presented with a dialog box the install will automatically apply to all users. Confirm the path to the source files and the default target by clicking **OK**.
4. The Zetafax printer and Zetafax program group will now be installed and be available to all users that have Zetafax user accounts.

Testing the installation:

1. Start a terminal services client session, logging on as a user with a valid Zetafax account.
2. Browse to the printers folder in the terminal session, highlight the Zetafax printer and go to **File: Properties**, then print a test page.
3. The addressing dialog box will popup and the Zetafax client should be started once the spooling has been completed, address the fax with a test fax number, confirm the options and then send.

Note: if you have any problems please refer to the troubleshooting section of this technical note. (see next page)

How it works:

When the Zetafax client is installed on a standard Windows workstation, each user gets their own (local) installation of the Zetafax printer, which they can use to send documents to their (local) Zetafax client. In an application server environment the situation is different. The Zetafax printer is installed on the application server and although any user in a terminal session can print to the printer, the printer process itself runs on the server, rather than in the user's session. The printer therefore has no direct way of communicating with the user's Zetafax client, or of working out which directory to print its output file to.

To solve this problem we install a 'daemon' process, which is added to every user's start-up group so that it will always be running in any terminal session. The Zetafax printer is able to communicate with the daemon for the terminal session that requested the print job. The daemon in turn launches a control program in the user's session, which determines the correct directory for the print job and launches the Zetafax client for addressing if required. The printer prints to the user's individual 'temp' directory. This setting should not be changed under normal circumstances.

Troubleshooting**Is embedded addressing supported with terminal services?**

The embedded addressing feature is not supported with the Zetafax printer within a terminal session, however is supported in terminal services mixed mode. See the 'References' section below to enable this.

When using Zetafax within terminal services how do I install the office addins?

If users wish to install the Zetafax office addins, each user then needs to install them by following the instructions in the Word document titled 'Installing the Zetafax Office Addins'. This document can be found in the Zetafax program group.

When I print a document to the Zetafax printer I do not get the Zetafax addressing dialog box, even if the Zetafax client is running?

On printing the document to the Zetafax printer you should be presented with the Zetafax addressing dialog box, if not, this may be due to the 'daemon' process not running in the terminal session. To check for this, start Task Manager and check to see if ZFDAEMON.EXE is listed in the current processes. If it is not running then copy zfax\SYSTEM\386\ZFDAEMON.EXE to the 'All users' startup group and restart the session.

For further information, troubleshooting, or tech notes on running Zetafax in a Citrix/Terminal Services environment follow the links below or contact Equisys customer support for assistance:

<http://www.zetafax.com/teknotes/ZTN1132.htm>

<http://www.zetafax.com/teknotes/ztn1149.htm>