ESKER VSI-FAX®

VSI Windows Client

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VSI Windows Client

This document explains how to install, configure, and use the VSI Windows Client. The VSI Windows Client is an easy-to-use front end to the VSI Fax server. It is designed to provide an easy way for desktop users to use VSI-FAX. The Windows client allows users to send faxes, view sent faxes through an Outbox, and view received faxes through an Inbox.

Using the VSI Windows Client, you can send faxes using either of two methods:

- Send a fax from an application that allows you to print
- Send a fax directly from the Windows client

The VSI Windows Client offers is composed of three components: Inbox, Outbox, and Send Fax. The Inbox allows you to view, route, and copy faxes that you receive. The Outbox utility allows you to view sent and pending fax jobs. It also allows a job to be modified and resent. The send dialog allows you to send faxes, based on your sending profile as set on the fax server. It also allows you to attach both local files and server-side files to a fax. It offers access to both public and private Address Books.

Requirements

The computer you're installing the VSI Windows Client on needs to meet the following requirements:

- Windows 98 or greater
- 5mb of hard drive space
- Network connection to the VSI-Fax Server
- Internet Explorer 5.5 or greater

Installation and configuration

To install the client, run the setup program and follow the prompts.

After installing, you will need three pieces of information to login:

- The VSI-FAX username/client id of the user
- The password for the specified user as setup on the fax server--this is not the OS password
- The Fax Server hostname or IP address

The install program adds the Inbox, Outbox, and Send Fax shortcuts to the start menu under Programs\VSI.

In order to use the print to fax functionality, you will need to start the VSIPtoF.exe program. To start the program, you can either reboot the computer, or you can start it by double-clicking the program icon in `c:\program files\VSI\VSI Windows Client\VSIPtoF.exe`.

You can verify that VSIPtoF.exe is running by looking in the Windows Task Manager.

To view or modify a fax job, server side archiving of sent jobs must be turned on.

⏩ For more information, refer to Server side archiving of sent jobs in the *VSI-FAX Installation and Administration Guide*.

Alt box

The Alt box is an alternate inbox that allows a user access to another inbox. The user logged in can either view their own inbox or click the Alt box button to view their alternate inbox. In order for another person to view the faxes in another inbox, they be granted permission by the owner of that inbox. To grant permission:

1. Open the Preferences menu

2. Double-click the user you wish to grant permission to
3. Check the Allow viewing rcvd faxes checkbox
4. Click OK

   For example, all customer service faxes go into the customer service inbox. All users have their own inbox, and they can access the customer service inbox as their alternate.

Logging in

Every time you run a component of the Windows Client, the login dialog will display. You will need to enter the following information to log into the VSI server:

- Username
- Password
- Hostname

The username must be a registered and licensed user of the VSI system. The hostname field is the TCIP/IP hostname or IP address of the VSI server.

Hide the login

If you check the Hide login box, the login dialog will not be displayed. It will automatically log you in, using the last successfully connected username, password, and hostname.

Inbox

The inbox program displays a list of your received faxes and allows you to view, delete, route, and copy these faxes.

You can switch between your own inbox and an alternate inbox by clicking the Home box button and the Alt box button, respectively. In order to view an alternate inbox, you will first need to select one.

▸▸ See “Selecting an Alternate inbox” on page 8.

The inbox you are currently viewing is displayed in the lower left hand corner of the program.

You can refresh your list of faxes in the inbox by clicking the Refresh button.

The inbox contains four fields:

- Request IDS
- Received
- Pages
- Received From

You can change the order of these fields by dragging the field names. This order will be saved when you exit the Inbox program so the next time you open the Inbox, that order will be maintained. If you click a field name, the fax list will be sorted by that category.

Viewing a fax

From the Inbox, you can view your received faxes.

To view a fax:

1. Select a fax
2. Double-click it

When you double-click a fax, it launches your default fax viewer.

Viewing fax properties

You can view the properties of any fax that you receive. To view fax properties:

1. Right click a fax
2. Select Properties

Deleting a fax

Once you no longer need a fax in your inbox, you can delete it. To delete a fax:

1. Right click a fax
2. Select Delete Fax

Note: Once you delete a fax, it is permanent.

Routing a fax

You can route a fax to another user. There are two ways to route a fax. You can either use the Route to button, or you can route using the right click menu. You can only route to users, not departments. Inboxes that are marked as departments will not show up in the list of possible routes.

To Route a fax using the route to button:

1. Click a fax that you want to route
2. Click the Route To button
3. Select a user to send the fax to from the list of users that is displayed

To route a fax using the right click menu:

1. Right click a fax
2. Select Route
3. Choose the user you wish to route the fax to
4. Enter a cost code and comment, if necessary
5. Click Route

When you route a fax, the server forwards it to a user and removes it from your inbox.

Filtering the list of routes

If an inbox is marked as a department, it does not show up in the list of routes. You can change users to individuals or departments, depending on whether you want them in your list of routes.

To change a user from an individual to a department, issue the following command on the VSI Server:

```
vfxadmin user -t utp=usr-dept <username>
```

where <username> is a user.

To change a user from a department to an individual, issue the following command on the VSI Server:

```
vfxadmin user -t utp=usr-ind <username>
```

where <username> is a user.

Copying a fax

You can send a copy of any fax that you receive to a user. When you copy a fax, it leaves a copy in your Inbox. You can only copy a fax to an individual, not a department.

1. Right click a fax
2. Select Route
3. Choose the user you wish to send a copy to
4. Enter a cost code and comment, if necessary
5. Click Copy

Preferences

The preferences dialog is used to select an Alternate inbox, grant permission to other users, and show or hide the login.

Selecting an Alternate inbox

An Alternate inbox is the inbox of another user. You can only view another user's inbox if that user gives you permission to view it. To select an Alternate inbox:

1. Options>Preferences
2. Select an Alternate inbox from the drop-down list

3. Click OK

▸▸ See “Selecting an Alternate inbox” on page 8 for more information on granting another user permission to view your inbox.

Granting permission to other users

A user can choose to allow other users to access their inbox by selecting a user in the list and then checking or unchecking which access rights they wish to delegate to other users.

To grant permission:

1. Options>Preferences
2. From the User List, double-click the user you wish to grant permission to
3. Check the Allow viewing rcvd faxes checkbox
4. Click OK

Show login

If you check this box, the login dialog will be displayed. If you uncheck it, the login will not be displayed.

▸▸ See “Logging in” on page 6.

Outbox

The outbox program allows you to view your sent faxes and the status of these faxes. If the fax has been archived, you can choose to view, modify, and resend the fax.

⏩ For more information on archiving, see “Archive” on page 14.

The outbox program displays a list of the faxes of whomever is logged in. If you log in as vsifax, you can then view all faxes sent by all users. Otherwise, you can only see the faxes that you have sent. You can update your list at any time by clicking the Refresh button. The Exit button closes the Outbox program.

Show login

To change your login option:

1. Options>preferences
2. Either check or uncheck Show Login Dialog

   If you check this box, the login dialog will be displayed. If you uncheck it, the login will not be displayed.

⏩ See “Logging in” on page 6.

Viewing a sent fax

When you view a fax, it will be displayed in your default fax viewer. If the fax was not archived when it was sent, an error message will display, telling you that the file does not exist. To view a fax:

1. Select a fax
2. Press the View button

Note: If you double-click a fax, the fax details dialog will be displayed.

Resending a fax

You can resend and modify any fax that you have sent. However, you must have first archived the fax when you sent it. Otherwise, you will get an error message telling you that there are no archive files. To resend a fax:

1. Select a fax
2. Click the Resend button
3. Enter values in the To and Subject fields

Viewing fax details

To view fax details, double-click a fax. The fax details dialog shows details in the following categories:

- Recipient information
- User defined information
- Transmission details

Deleting a fax

If you no longer need a fax in your outbox, you can delete it. To delete a fax:

1. Select a fax

2. Click the Delete button
3. Click Yes

Note: You can also view, resend, and delete by using the right click menu.

Purging databases

If the olog contains many records, it will take a long time to start the application. Since this is a server call, the amount of data coming over the wire can take a bit of time. Purge the olog on a regular basis.

Note: It is best to purge once a day.

⏩ See "Server Maintenance" in the VSI-FAX Server Manual for more information on purging the olog.

Send Fax

There are two ways to send a fax, using the Windows Client. You can either send a fax, using the Send Fax component of the Windows Client, or you can print to fax from another program.

When you send a fax, there are two basic ways you can enter your fax recipients:

- Select a recipient with a valid fax number from your fax Address Book
- Manually enter a fax recipient using manual fax notation

Sending a fax using the Send Fax component

1. Run the VSI Windows Client Send fax program from Start>Programs>VSI>Send Fax
2. Enter a recipient in the Fax Number field. You can either enter recipients by selecting then from the Address Book or entering them manually using fax notation.

▶▶ See “Entering recipients” on page 13.

3. Enter a subject in the subject field
4. Type a message in the Memo/body field. This text will be displayed on the fax coversheet
5. Add any attachments

▶▶ See “Attachments” on page 14.

6. Click Preview to view your fax

   The fax will open in your default fax viewer.

7. Click Send

Print to Fax

You can print a document from another program to the VSI Windows Client. The document will be attached to a fax that you can then send like usual. To print to fax:

1. In another program, such as Microsoft Word, select File>Print.
2. Select VSI Windows Client as the printer.
3. Click Print or OK, depending on the program.
4. Send the fax as you would, using the Send Fax component.

▶▶ See “Sending a fax using the Send Fax component” on page 13.

Entering recipients

You can either select recipients from the Address Book, or you can manually add the recipient, using manual fax notation.

Selecting a recipient from the Address Book

Perform the following steps to select a recipient from the Address Book:

1. Click the Address book button
2. Select a Address Book from the drop down menu
3. Select a recipient by clicking on their name
4. Click on the right arrow button to add them to the recipient list

5. When you are done adding recipients, click Done

Finding a person in the Address Book

You can search for recipients by Company using the Find function. Perform the following steps to Find a person in the Address Book:

1. Click the Address book button.
2. Enter the Company name in the Find field.

   When the Company name is found, it will move to the top of the Address book list.

Manual fax notation

Manually entering a fax recipient is useful when you want to send a fax without adding someone to your user Address Book. You can enter recipient information directly into the To field using any of the following formats:

<fax_number>

<fax_number>@<company>

<name>@<fax_number>

<name>@<fax_number>@<company>

<email_address>

<name>@<email_address>

<name>@<email_address>@<company>

Where <fax_number> is a valid fax number, <company> is a company name, <name> is a person's name and <email_address> is a valid internet email address (e.g., sales@esker.com).

Mixed recipients

When you send a fax, your recipient list can be a mixture of fax recipients and email recipients.

Archive

The Archive button sets whether a fax that you send is saved on the server. Archived faxes are stored on the server, never locally. If the button is depressed, then the fax is saved. If not, then the fax is not saved. If you archive a fax, then you can view it in your outbox and resend it, if necessary.

Attachments

The Attach button allows you to add files to a fax. You can either attach system files or local files to a fax.

Attaching a system file

System attachments are created on the server by the administrator. Although anybody who has access to the server cn access and use these files, only an administrator can create or save system files. To attach a system file:

1. Click the Attach button
2. Select a file in the Server Files box
3. Click the right arrow to place the file in your list of Current Attachments
4. When you have finished attaching files, click OK

Attaching a local file

You can attach any file from any local or network drive that you have access to. However, the file must be a file type that is supported by the VSI-FAX Server, such as an ASCII text file.

⏩ Refer to Automatic file conversion in Appendix A of the VSI-FAX Installation and Administration Guide for more information on supported file formats.

To attach a local file:

1. Click the Attach button
2. Click the Local Files button
3. Browse to select the file you want
4. When you've selected a file, click Open
5. When you have finished attaching files, click OK

If you want to attach a non-supported file type to the fax, you must use the Print to Fax operation.

⏩ For more information on printing to fax, see "Print to Fax" on page 13.

Address Books

The Address book is composed of several Address Books, including a Public Address Book, a Private Address Book, and any groups that you create. The Public Address Book can be seen by everybody, and the private is seen only by the user logged in. You can perform the following actions, using the Address book:

- Select a recipient from the Address book
- Add a person to the Address book
- Delete a person from the Address book
- Modify an entry

Note: Whether you can add, delete, or modify a public Address Book is determined by your administrator

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⏩ For more information on selecting a recipient, see "Selecting a recipient from the Address Book" on page 13.

Adding a person

To add a person to your Address book:

1. Click the Address book button
2. Click the Add Person button
3. Select whether they will be in your Private or Public Address Book
4. Enter their information, such as First Name, Last Name, and Fax number
5. Click OK

Deleting a person

To delete a person from your Address Book

1. Click the Address book button
2. Select a person to delete
3. Click the Delete Person button

4. Click Yes to confirm that you want to delete that person

Modifying an entry

To Modify an entry in your Address book

1. Right click a person in your Address book
2. Select Modify Entry
3. Make your changes
4. Click OK

Send options

The Send options dialog is found under Options>Send options and Options>Preferences. The only difference between the two is that they highlight different tabs. Send options allows you to change the following:

- Cover page options
- Send options
- Directories
- Application settings

Any changes that you make in the Send options dialog will be maintained as long as the Send component is running. However, when you quit the program, all the changes you made will be reset.

Cover page options

The cover page options tab allows you to set what will be displayed on the cover page of the fax. You can enter your name, address, phone number, fax number, etc, and these values will be used in the fax cover page.

Note: You can only change fields that the administrator has given you permission to change.

To use a cover page:

1. Options>Send Options>Cover page tab
2. Check the Use coverpage checkbox
3. Select a coverpage from the drop-down list

Send options

Using the Send Options tab, you can change the following fields:

- Email notification
- Priority
- Resolution
- Cost Code
- Overlay
- Page Size
- Page Orientation
- Retry method
- Queue

- Dial Prefix
- Dial Suffix

Overlay

Overlays work with faxes in much the same as printing documents onto letterhead. When you select an overlay, it and your document are merged into a single TIFF file. The overlay file must be a TIFF file, and the document can be any supported format but PDF. The overlay files must be stored on the server in the /image directory of the VSI server. Since overlays use a 196x204 resolution, it is difficult to line up data. Therefore, overlays are best suited to headers and footers.

Note: Overlays are not a forms package, and they are not suited to complex formatting.

Since overlays are file-specific and not stored as a user profile setting, the overlay you choose for a particular fax is not saved when you exit the Send program.

Address Book

This tab allows you to manage your Address Books. You can add a new person, create a new group, or edit a group. You can also add ODBC Address Books to the list of Address Books.

Creating groups

To create a new group:

1. Press the New group button
2. Enter a name and descirption of the group
3. Select whether this group is Private or Public

Note: If you select Public, you can only choose group members from your Public Address Book. If you choose Private, you can only choose group memebers from your private Address Book.

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4. Click OK

Editing Groups

You can either edit pre-existing groups or create a new group.

▶▶ For information on creating a new group see “Creating groups” on page 17.

To edit a group:

1. Click Edit groups
2. Select a group from the drop-down menu
3. Either add or remove group members
4. Click Close

To add group members

1. Select a person from the Address Book members column
2. Click the left arrow button

To remove group members

1. Select a person from the Group Members column

2. Click the right arrow button

ODBC Address Books

To use ODBC Address Books with the Windows Client, you will first need to configure your computer.

▶▶ See “Configuring your computer to read ODBC” on page 23.

To add an ODBC Address Book:

1. Click New
2. Select a data source from either File Data Source or Machine Data Source
3. Click OK
4. Enter a name for your Address Book
5. Enter an ODBC query

▶▶ For more information, see “Select and Query statements” on page 23.

6. Click test

   The number of entries found will display. If the number is greater than zero, it means that you have successfully connected to the ODBC database and are reading the entries.

7. Click OK

If you no longer want an ODBC Address Book listed, you can delete it. To delete an ODBC Address Book:

1. Select the Address Book from the drop-down list
2. Click Delete
3. Click OK

You can edit the Address Book name, ODBC Connection, and ODBC Query fields of the ODBC configuration. To edit an ODBC Address Book:

1. Select a Address Book from the drop-down list
2. Click Edit
3. Edit the necessary fields
4. Click OK

Note: Although the program can read from an ODBC Address Book, it cannot write to it. Therefore, if you need to edit the entries in an ODBC Address Book, you will have to use your database client

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Application Settings

In this tab, there are two options you can set: Show login and Close on send

Show login

If you check this box, the login dialog will be displayed. If you uncheck it, the login will not be displayed.

▶▶ See “Logging in” on page 6.

Close on send

If you check this box, the Send component will be closed when you send a fax. This feature is particularly useful if you are using the print to fax functionality.

▸▸ See “Print to Fax” on page 13.

Enable delay send

If you check Enable delay send, a dialog will be displayed when you click the Send button asking if you want to Send Now. To send the fax immediately, click OK. Otherwise, click Set time to send and enter a date and time and click OK.

Appendix

This appendix describes program settings that might be of interest to an Administrator.

Registry Keys

The Windows Client creates two registry keys:

- HKEY_LOCAL_MACHINE\SOFTWARE\VSI\WinClient
- HKEY_CURRENT_USER\SOFTWARE\VSI\WINCLIENT

The local machine key is created by setup, and the current user key is created when you run the program. The current user fields are populated when you run the program.

Current user fields

The following fields are created by all three components, Inbox, Outbox, and Send:

- Default
- Hostname
- Password
- Showlogin
- Username

Inbox creates the following fields:

- Alternatebox
- Inorder
- Routeto

Outbox creates:

- Outorder

Send creates:

- CloseOnSend
- Useodbc

You can change the value data in the Registry. If you delete the Registry key, the Windows Client will recreate it when it is run next. However, the fields will not be populated.

Executables

The three mail executables for the program: inbox.exe, inbox.exe, and send.exe do not need to be run from the default program folder. For instance, they can be run off a network drive. However, the exe and the dll need to be in the same directory to run properly.

Terminal Server

The Windows Client can be installed under Terminal Server, both Citrix and Microsoft TSE. To install, run Add/ Remove Programs.

Appendix B

This appendix describes the technical information necessary to use ODBC phone books with the Windows Client.

Configuring your computer to read ODBC

In order to use an ODBC phone book, you will need to first configure your computer. To configure your computer:

1. Load, if necessary, the proper ODBC driver, using the ODBC management utility located in the Windows Control Panel
2. Decide how you are going to retrieve data from the data source. You can either specify an actual SQL Select statement, or you can invoke a database server query.
3. Set up the output from the database so that the fields are in the following order: Alias, First name, Last name, Company, Fax number.

Select and Query statements

When enter an ODBC query, you can either enter a Select or Query statement. The following is a sample Select statement:

```
SELECT alias, fname, lname, company, fax FROM table1
```

The following is a sample Query statement:

```
{ call query1 }
```

Curly braces are required if you enter a query name. If you enter a select statement, the closing semicolon is not required.