

INSTALLATION GUIDE



HI FREAKS!

Obviously, you are an impatient word processing profi who does not want to waste time with too long and detailed installation guides. We have written these short instructions especially for you. If you have the right system environment and if you are lucky, you will install FaxWare 4 ready for operation by taking these few steps.

Of course, this folder is no substitute for the detailed installation instructions in our documentation. On the contrary. If you have time, you should in any case consult the manual. However, even if everything works out fine, we would recommend that you read the complete explanation in the manual.

It is very important, that you carry out the individual steps in the order indicated. This is the only way to ensure a good installation.

1. Checking the standard contents

As standard, FaxWare 4 contains this short installation guide as well as the following components.

- ◆ Six installation disks in the format 3 ½ HD (files are compressed).
- ◆ Documentation containing a detailed description concerning the FaxWare installation, configuration and operation, as well as a reference chapter.
- ◆ Five user leaflets »Introduction for users«.
- ◆ A reference leaflet showing all FaxWare commands.

2. Making preparations

Please check first of all, if the following installation conditions apply to your system environment.

- ◆ File server under Novell NetWare 3.1x or 4.1 with a free memory capacity of at least 15 MB on the volume SYS:
- ◆ Installed fax hardware on or in the file server.
- ◆ Interface board with UART 16550 (FIFO) if you use a fax modem.
- ◆ Correct connection between fax hardware and telephone connection.
- ◆ Workstation with 3 ½“ disk drive for the FaxWare installation.

3. Starting the installation program

- ◆ Log in from your workstation on the file server on which FaxWare is to be installed as user with SUPERVISOR equivalent rights.
- ◆ Please insert the disk with the name »Install Disk« into the disk drive of the workstation and start the installation program by entering

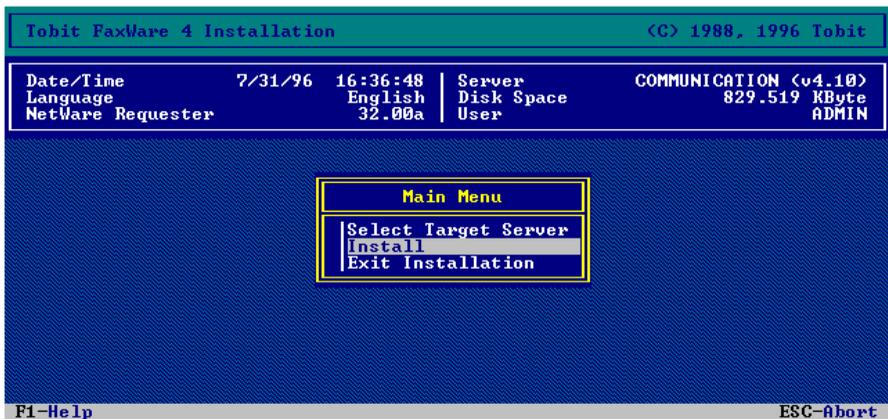
INSTALL

If there are any reading errors during installation, the reason can be a defective disk. In this case, please ask the FaxWare supplier for a new disk set. However, before you do this, you should try to make the installation on another workstation to be sure that the disk drive is not out of order.

After you have selected a language, the main screen of the installation program will be displayed. By pressing the F1 key, you will always obtain an »on-line help«.

- ◆ If the menu item »Current Notes« is emphasized, please note this information first.
- ◆ The name of the file server on which you are logged in is displayed in the top screen area. If you wish to install FaxWare on another server, please select this file server by selecting the menu item »Select Target Server«. By pressing the INS key, you can log in on further network servers.
- ◆ Please now start the FaxWare installation on the selected file server by means of the menu item »Install«.

The installation program



- ◆ First enter your company data. This data will be used later for an »on-line registration« of your FaxWare installation. In addition, you can also integrate this data as variables in fax documents (e.g. on a coverage page).
- ◆ The FaxWare program files are copied into the directory SYS:FAXWARE on the target server.
- ◆ Perhaps you will receive a message telling you that some NetWare files on your file server are obsolete. In this case, you should adopt the new ones to avoid future problems.
- ◆ Select your installed fax hardware from the hardware list.
- ◆ If your type is not stated, please select the respective »native« driver (marked with a *) at the list end.
- ◆ Please answer the further questions for the line configuration which can vary depending on the hardware. By pressing the F1 key, you will obtain further notes about this topic.
- ◆ When the copying procedure is complete, a corresponding note will be displayed on the workstation screen and you can exit the program.

4. Starting the main module on the server

The FaxWare main program, the »Service Layer«, runs as a NLM on the file server. Please carry out the following steps directly on the file server.

When the installation is complete, a message will be displayed on the server console, stating the parameter to start FaxWare. If there is no message, please check if you have selected the correct server for the installation!

When you install FaxWare on a NetWare 4 server with NDS support, a special module must be loaded on the server. Please read firstly the notes in the FaxWare documentation (section »Installation/Configuring FaxWare under Novell NetWare 4«).

- ◆ Please enter the following on the server console:

```
FAXWARE
```

- ◆ Now you will be asked to enter your FaxWare license number. You will find this number on the enclosed Licensee Card. After this, the FaxWare main menu will be displayed.

5. Carrying out the basic configuration

The FaxWare configuration is carried out directly in the FAXWARE.NLM on the server. By pressing the F1 key, you will obtain an »on-line help« for every menu item. To ensure smooth operation, you have to make the following settings once.

- ◆ Indicating the general send identifier
Please enter your CSID in the menu item »Configuration/System«.
- ◆ Selecting a recipient of undistributed faxes
Please select in the menu »Configuration/System« a »Recipient of Undistributed Faxes«.
- ◆ Configuring the FaxWare users
Please adopt users in the network as FaxWare users in the menu item »Configuration/Users«. You can configure so many users, that the user number corresponds to the number of user licenses. If you wish to configure further user licenses, please have a look at the notes in the respective license packs.
- ◆ Configuring a printer filter for the printout of fax files
Please go to the menu »Configuration/Printer/Fax Printer/Print Queues (PCL) and select at least one print queue of the file server for the printout of fax files.

The Main menu



- ◆ **Configuring a fax queue**
If you wish to create faxes with DOS applications by using a »queue diversion« (»capture«), you have to configure a fax queue (menu item »Configuration/Services/Queue Services«). If you work with Novell NetWare 4, you afterwards have to use the NetWare utility PCONSOLE to assign those users to the queue who are allowed to use it.
- ◆ **Configuring the FileFax Services**
You have to configure a FileFax Service (menu »Configuration/Services/FileFax Services«) to search fax jobs (»filescan«) in certain directories under DOS.
- ◆ **Configuring the PCL Conversion Server**
If you wish to use a HP Laserjet printer driver from DOS applications to create faxes, you first have to configure the PCL Conversion Server (see manual). After this, you should configure a fax queue (menu »Configuration/Services/Queue Services«) or a FileFax Service (menu »Configuration/Services/FileFax Services«) accordingly.

Please consult the detailed documentation for further details, such as insertion of signatures and graphics or the use of coverpages.

6. Loading drivers for the fax hardware

For every fax hardware (e.g. ISDN board, modem) installed on the server, you have to install a driver creating the connection between FaxWare and the fax hardware. This driver, the »Transport Layer Driver« (short TLD), is loaded as a NLM on the server.

FaxWare 4 supports up to 64 exchange lines per server. However, this installation guide only describes how the first line is configured and put into operation. In the manual there are notes concerning the multi-line support.

Please make sure that the fax hardware has been installed correctly. It is particularly important that the settings for interrupts and port addresses are correct, so that conflicts with other hardware products are avoided! Please consult the FaxWare documentation for further notes.

Use of a fax modem

- ◆ Please load the driver for the serial interface of the file server to which the modem is connected (AIO.NLM and AIOCOMX.NLM for COM1 to COM4) or use the »AIO Auto Driver Load« feature. Then, these drivers are automatically loaded when the TLD is started.
- ◆ Please start the TLD by entering the following on the server console:

```
TLD01
```

If an error occurs, this is due to a defective connection between the modem and the interface or the modem has not been initialized correctly. Please refer to the notes in the documentation.

If the loading procedure has been carried out correctly, the TLD screen will appear. The configured line in the Service Layer, the FAXWARE.NLM (menu item »Monitor/Lines«) will have the status »active«.

Use of an ISDN board

- ◆ Please configure the ISDN board with the respective software drivers for fax operation under Novell NetWare and configure the ISDN board for your telephone connection.
- ◆ Please load the TLD by entering the following on the server console:

```
TLD01
```

If error messages are displayed (»Loader cannot find public symbol«...), the CAPI driver has not been loaded (correctly).

If the loading procedure has been carried out correctly, the TLD screen will appear. The configured line in the Service Layer, the FAXWARE.NLM (menu item »Monitor/Lines«) will have the status »active«.

Use of an intelligent fax board

- ◆ Please configure the fax board for fax operation under NetWare and configure the board for a smooth operation in your server (IRQ and port conflicts should be avoided!).
- ◆ Load the TLD by entering the following on the server console:

```
TLD01
```

If the loading procedure has been carried out correctly, the TLD screen will appear. The configured line in the Service Layer, the FAXWARE.NLM (menu item »Monitor/Lines«) will have the status »active«.

Use of a TCP/IP transport protocol (Internet)

- ◆ Load the NetWare support modules TCPIP.NLM and TLI.NLM on the file server. Make sure that the TCPIP.NLM is correctly bound to the network board. For detailed notes, please refer to your NetWare documentation.
- ◆ Load the TLD by entering the following on the server console:

```
TLD01
```

Should error messages occur when doing this (»Loader cannot find public symbol«...), the module TCPIP.NLM has not been loaded (correctly).

If the loading procedure has been carried out correctly, the TLD screen will appear. The configured line in the Service Layer, the FAXWARE.NLM (menu item »Monitor/Lines«) will have the status »active«.

As experience shows, the fax hardware configuration is the most difficult item during the installation. If the outputs described do not correspond to the results of your installation, please consult the manual.

7. Carrying out a system test

After installing FaxWare, you should carry out a system test. The entire system test checks fax dispatch and receipt (if the corresponding configurations have been made), as well as the printout of graphic documents on a printer.

7.1 Sending a test fax

- ◆ Please select the menu item »Information/Send Test Fax« in the FaxWare Service Layer. Enter the number of the distant station, write a short text and dispatch the fax.
- ◆ After a short time, the bar »Conversion« in the top screen area will move. The fax will now be converted into the fax format.
- ◆ After conversion, the job will appear in the FaxWare job log (menu item »Monitor/Jobs«) and have the status »Waiting«. Shortly afterwards, the job will be passed on for dispatch to the fax hardware (status »Being Processed«).
- ◆ If the job still has the status »Waiting« instead, please check if the driver for the fax hardware (TLD.NLM) has been loaded. Go to the menu item »Monitor/Lines«. The installed line must have the status »active« and »TX« (for send mode).

- ◆ After every transmission attempt, an entry will be made in the send log (menu item »View Logs/Send Log«). If the attempt did not succeed and if further redials have been terminated, the job will remain in the job log until the last attempt.

7.2 Receiving a test fax (optionally)

- ◆ Please check first, if the line for fax receipt has been configured and if the driver (TLD.NLM) has been loaded on the server. In the FAXWARE.NLM under menu item »Monitor/Lines«, the configured line must have the status »active« and »RX« for fax receipt.
- ◆ Please now send a fax from another distant station to the number of this line. As soon as the fax hardware accepts the call, the status »receiving« will be displayed in the menu item »Monitor/Lines« behind the respective line.
- ◆ After a short conversion (see below) the received fax should be printed out on the assigned printer.

7.3 Printing out a test document

- ◆ Please go to the menu item »Information/PrintTest Fax« on the FaxWare Service Layer.
- ◆ Please select a printer driver for the printout. If no printer filter is displayed, please have a look at paragraph no. 5 »Basic configuration« of this installation guide. Please note, that FaxWare 4 requires a PCL compatible printer.
- ◆ After a short time, the »Printing« bar in the top screen area will move. A test file will now be converted into a print file.
- ◆ A test page will be printed out via the print queue which is entered in the selected printer filter (e.g. »Fax Printer«), menu item »Configuration/Printer/Fax Printer/Print Queues (PCL)«.

The above-mentioned tests are used to check if FaxWare 4 is ready for operation on the server. If you do not achieve the results stated here, you should interrupt the installation and consult your manual.

8. Configuring Frontends on the clients

If a FaxWare user wishes to fax from an application, a »Frontend« has to be configured on his workstation. During the installation these programs (for DOS and Windows respectively) have been copied to the file server. They can be activated or installed at any time. For further notes, please consult the FaxWare documentation.

Configuring for text-orientated operating systems

The DOS Frontend does not have to be installed. It can be directly activated from the directory of the server on which FaxWare has been installed.

- ◆ Please activate the program (FWDOS.EXE) on the DOS level from the directory SYS:\FAXWARE\CLIENTS\DOS of the FaxWare server. Please insert the following at the DOS prompt:

```
FWDOS
```

The note »FWDOS Installed Resident « will be displayed.

- ◆ The program has now been loaded as resident and can also be loaded from other programs by using the stated key combination (Ctrl-Alt-F).

If any errors occur, the workstation has not been configured correctly for operation under Novell NetWare. Please have a look at the notes in the FaxWare documentation!

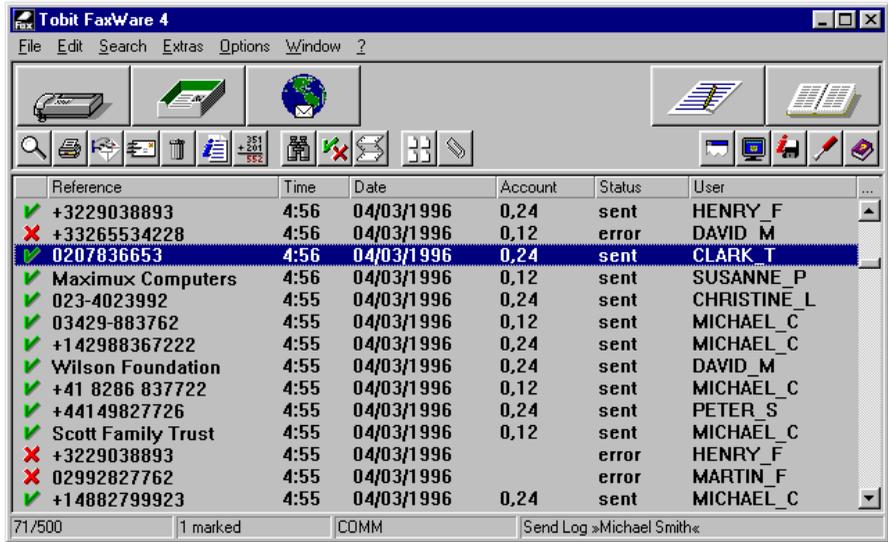
Configuring for graphic operating systems

The Frontend (FWWIN.EXE) and the FaxWare printer driver on the client of the FaxWare user have to be installed under graphic operating systems. The installation procedure is the same for all supported Windows versions (Windows 3.1x, Windows 95 and Windows NT).

- ◆ Please activate the installation program (SETUP.EXE) from the directory SYS:\FAXWARE of your FaxWare server. To do this, select the function »File/Run« in the program manager under Windows (or »Start/Run« under Windows 95) and enter the above-mentioned path as command line. If the volume SYS: bears the drive name F:, you should enter:

```
F: \FAXWARE\SETUP
```

- ◆ Make the desired settings for the Frontend configuration and start the installation procedure.



- ◆ Exit Windows after the installation, start Windows again and load the Frontend from the selected program group by double clicking on the program icon.

If any errors occur here, the workstation has not been configured correctly for operation under Novell NetWare. Please have a look at the FaxWare documentation!

After the Windows Frontend has been configured, you should give the FaxWare users the folder »Introduction for users«. It helps to understand how FaxWare works and to use it correctly.

If you wish to install further client programs for other operating systems (e.g. Apple Macintosh), please read the respective documentation enclosed with the software.

What you can do after the installation

You have carried out the basic FaxWare configuration. If the system runs correctly, you should optimize it step by step to use all FaxWare features and functions.

Below, you will find some suggestions. In the FaxWare documentation you will find further notes.

- ◆ Extend the FaxWare charge databases by regional tariff zones to assure a correct cost calculation and successful charge optimization.
- ◆ Please use the FaxWare backup function to back up important system files and to prevent loss of data if a server crashes.
- ◆ Configure the FaxWare data purge according to your requirements to avoid an unnecessary "file overflow" (menu »Configuration/System«).
- ◆ Please use the FWCONFIG.EXE utility to configure the FaxWare users and groups under Windows.
- ◆ Please create signature files for the FaxWare users and assign them to the corresponding users.
- ◆ Please create your company logo as graphic file and configure it as a form in the Form Manager.
- ◆ Please configure phonebooks for the existing NetWare groups.
- ◆ Please check the system utilization created by FaxWare when the system is running and set the optimum utilization. We recommend the use of the »Dynamic Server Load« feature.
- ◆ Please regularly check the entries in the FaxWare error log. Draw the users' attention to wrong FaxWare commands. See menu »View Logs/Error Log«.
- ◆ Use the »Userhold« function for fax jobs. Especially users having little experience with FaxWare should check the complete fax files before dispatch.
- ◆ Configure an individual printer filter for every user and every group. If you use the function provided for the graphic design of the fax margin of a printout, it will be easier for you to assign these printouts.
- ◆ Please enter the personal data of every user. By using variables, this data can for example be automatically integrated in coverpages.

- ◆ Particularly after fax broadcasts you should check the send entries containing errors and check the fax numbers dialed. When you dial such a fax number, you will often hear a “human” voice informing you that the number has changed.

By the way...

The FaxWare 4 licensing system is slightly different than that of other manufacturers. In the case of all products, the Licensee Card is used to prove that you have an original software (similar to a »vehicle registration document«). You should keep this card and other Licensee Cards in a safe place. If you wish to obtain product updates or additional components, this will be the only valid proof that you have an original license.