Replix®

Delivery Manager

Admin Guide

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Softlinx®

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Table of Contents

INTRODUCTION 1
INSTALLATION OVERVIEW 2
CONFIGURING THE REPLIXFAX DELIVERY MANAGER 3
START THE CONFIGURATOR 3
USING THE CONFIGURATOR 4
MANAGING THE DELIVERY MANAGER SERVICE 9
FOLDER AND FILE NAMING SCENARIOS 10
Formatting Metadata 12
TROUBLESHOOTING 13
Credential Validation 13

Introduction

ReplixFax Delivery Manager is a Windows service that polls for newly received and sent faxes, captures fax information and routes them to a file system. Optionally, the fax can be printed to a network printer.

Multiple incoming fax numbers (ReplixFax users) can be polled. Each fax file can be named and placed into a folder based on available fax information such as job id, sender fax number, time received, TSI, etc.

This documentation will guide you through the setup and operation of the ReplixFax Delivery Manager application.

Installation Overview

In order for the ReplixFax Delivery Manager to install properly, the following prerequisites must be met:

- Supported Operating System: Microsoft Windows 2012 and 2008
- User has Windows administration privileges
- Microsoft Dot Net 4.0 is installed on the system

To start the installation, run the setup.exe application. Accept the default installation options. For customers that are using an on-premise version of ReplixFax, this program can be installed and run on a separate system than the ReplixFax server system, or can be located on the same machine as the fax server.

The installation creates a Windows service "Replix Fax Delivery Manager" which is set to Automatic startup.

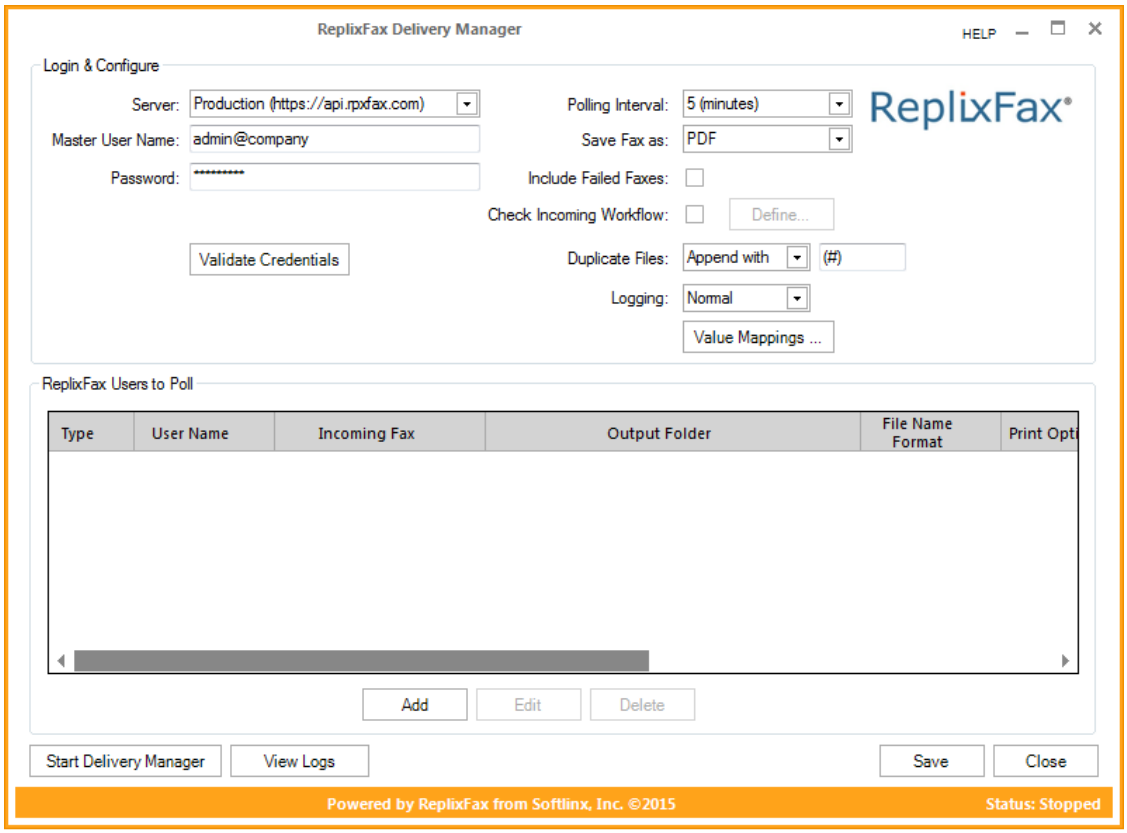
Do not start the service until you have configured the Service using the Configurator Application.

Configuring the ReplixFax Delivery Manager

The ReplixFax Delivery Manager will poll the ReplixFax Cloud Service for newly arrived faxes. The fax images will be retrieved over a secure connection to the ReplixFax Cloud Service and stored on a locally accessible folder.

Start the Configurator

The Configurator can be accessed by clicking on the icon in the desktop tray. "Right mouse click" the icon and then select the configure menu item. The main screen of the Configurator will appear:

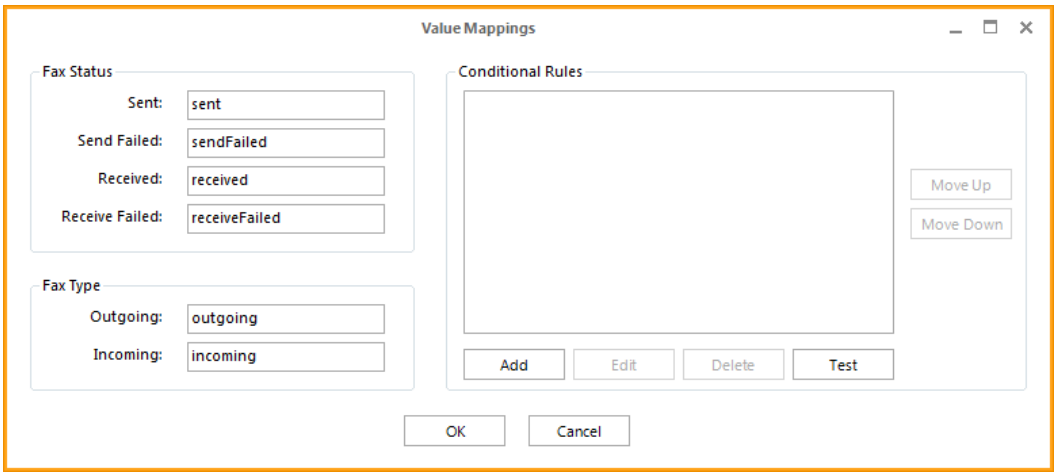


Using the Configurator

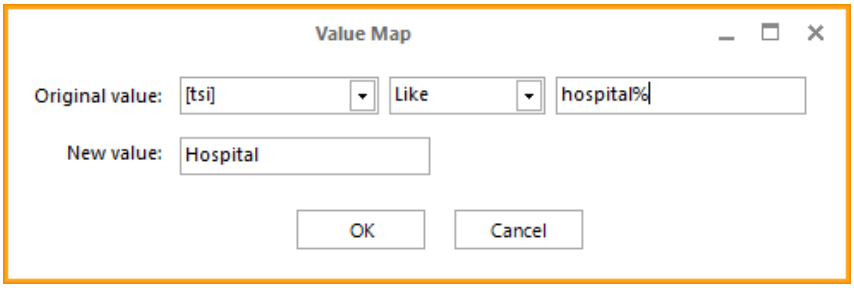
In order for the Delivery Manager to work correctly, master user credentials must be set and the PC running the Delivery Manager must be registered in the Cloud Fax service. Take the following steps to set up the Delivery Manager:

- **Select the Server -** Select either the production cloud service or the test cloud service. Softlinx support will provide instructions as to which server you should use.
- **Enter valid master user credentials -** The Master User Name should be a valid ReplixFax user. If the Delivery Manager will be used to poll for multiple fax numbers (ReplixFax users), then the master user must have the proxy permission. Obtain the appropriate user credentials from your administrator.
- **Validate Credentials -** After entering the username and password, press the "Validate Credentials" button to confirm that the user credentials are correct and the user has the appropriate permission. If a server license is not set for this PC, you will see a message indicating this and you must provide Softlinx support with the unique key associated with the PC. The key is automatically copied into your clipboard. Paste this string into an email and send it to help@softlinx.com. Softlinx support will use this key to enable the Delivery Manager to run on this PC.
- **Select Polling Interval -** The polling interval is the number of minutes at which the Delivery Manager will poll for new faxes. The minimum polling interval is 5 minutes.
- **Select Output File Format -** The Fax images can be stored as PDF or TIFF. If PDF is selected, then one PDF file will be created per fax. If TIFF is selected, then either one TIFF file can be created per Fax or the TIFF file can be split into individual page TIFF files. See the File Naming Scenarios section below for more details.
- **Include Failed Faxes -** If "Include Failed Faxes" is checked, then faxes that did not get sent completely or faxes that were only partially received will be returned by the Delivery Manager.
- **Check Incoming Workflow -** Retrieve faxes with or without a specific workflow status. This typically is only applicable for incoming faxes where barcode reading is enabled.

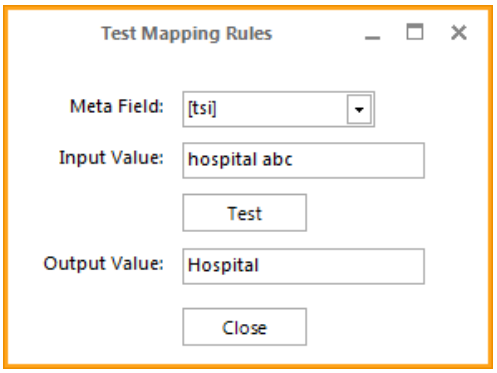
- **Duplicate Files -** If Fax is downloaded and there is already a file with the same name, then the new file name will be prepended or appended with a counter. The format of the counter must contain "#", which is replaced with an increasing counter value.
- **Logging -** The two options for logging are normal or high. Typically, the Delivery Manager should be run with normal logging. High logging should only be selected if there is an issue and it is being actively investigated.
- **Change Mappings -** Use the Mapping dialog to map fax status and fax type to static text that can be used in the filename or folder path. For example, if [status] is part of the folder path, then faxes that were received would be placed in the folder called "received". Faxes that were not completely received would be put in a folder called "receiveFailed". You can also create rules based on non-static metadata.



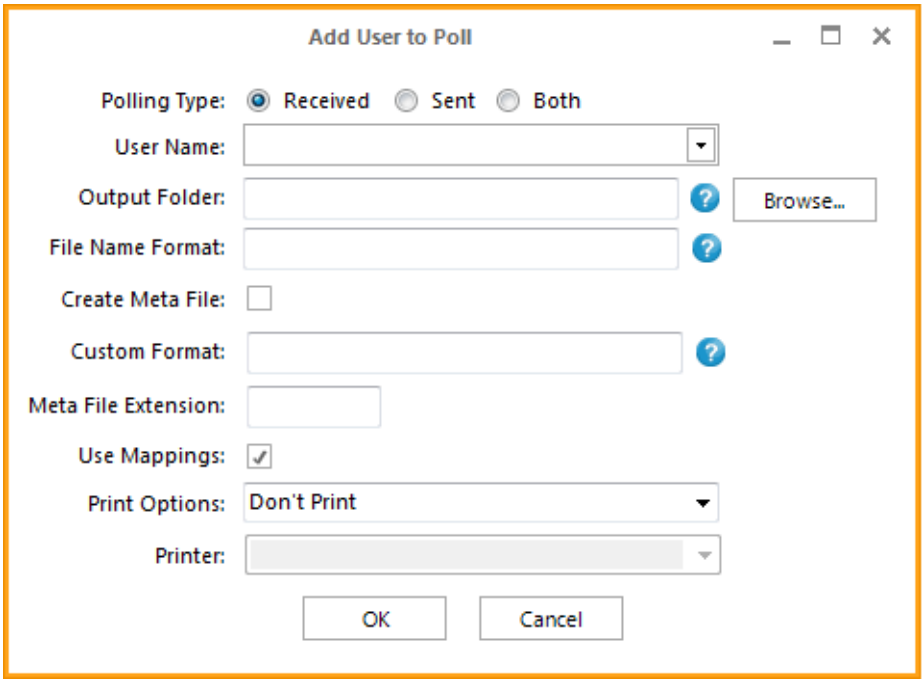
  - **Conditional Rules -** If you need to group faxes based on data from dynamic metadata like TSI, then you can add condition rules. When creating a rule, pick the metadata field, the operator (equal, not equal, or like) and the pattern. Use "%" to match any number of characters and "_" to match a single character. If the value in the fax metadata field matches the rule, then the "new value" is used when constructing the folder name or file name. Rules are tried in order.



- **Testing Conditional Rules** - To see if your rules result in the desired behavior, press the "Test" button. Select the metadata field you want to simulate. Enter the input value which represents what is found in the fax. Press "Test". The Output value is the result of processing the rules.



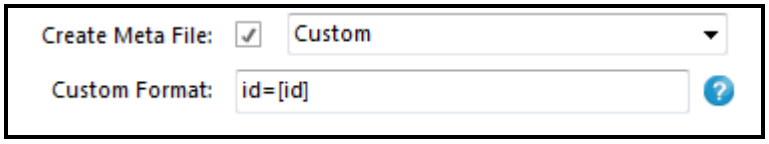
- Add ReplixFax Users to poll - Press the “Add” button and the Add User Dialog will appear:



For each user, specify the following information:

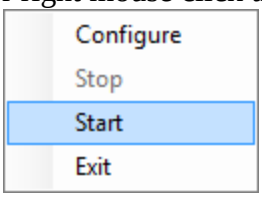
- **Select the type of fax to be polled.** Sent and/or Received faxes can be polled and retrieved. Only successfully sent or received faxes will be retrieved. Failed faxes will not be retrieved.
- **Specify a valid user.** Select from the list. If the Master User does not have sufficient privileges, then only the master user will be in the list.
- **Specify the output folder.** When fax images are retrieved, they are put into a folder. This can be a static folder or a dynamically created one based on fax metadata. See the Folder and File Naming Scenarios section for examples of how to configure the output folder. Meta placeholders are replaced with real fax metadata. To access these placeholders, put the cursor on the text field and then right-click. Select a value. The placeholder will be added to the value.
- **Specify the filename format**. The name should not be static, but it must be based on fax metadata. To set the placeholder values, follow the previous instructions for output folder.

- **Optionally create a meta value file**. If selected, select the type of metadata file to create: XML, JSON, name/value, or custom. A metadata file will be created in the same folder where the fax file is created with the same name as the fax file except with the different extension. The default file extension is "meta", but can be changed by entering the extension in the meta extension field.
  - If custom is selected, then the Custom Format field will be editable. Right mouse click in this field to see the list of metadata fields available to include in the file. Static text can also be added. The static test and variable metadata will be added to the meta file. Add "\n" to the Custom Format field where new line characters are required.



- Optionally set Meta File Extension. If a metafile is being created the default extension is "meta". To change this, enter the desired value in the Meta File Extension field. Do not include the leading period.
- Optionally use the mapping rules. If selected, the static and conditional mapping rules will be used when processing faxes for this user.
- Select a Print Option. Optionally, a fax can be printed. Select whether sent and/or received faxes should be printed.
- Select a printer. If a fax should be printed, then select an installed printer to use.
- Press Ok when done Select a printer. If a fax should be printed, then select an installed printer to use.

- **Save your changes.** After making changes, press the “Save” button at the bottom right of the window.
- **Starting/Stopping the Delivery Manager.** Click the "Start Delivery Manager" to start the Delivery Manager Windows service. If the service is already running, then the button's text will become "Stop Delivery Manager".

- **Viewing Log Files.** The Delivery Manger will always log errors. It can optionally log informational messages. Both types of messages are written to the same file. Select the "View Logs" button to open a dialog that will show the current log files. The Delivery Manger will roll over the current log file after it reaches a certain size. It will only keep a certain number of files. You can open each of the log files by selecting the log and pressing the "View" button.
- **Start the Delivery Manager.** Once the configuration is saved, start the Delivery Manager Service. Either select the "Start Delivery Manager" button or right mouse click the icon and then select the "start" menu item. 

The status shown on the bottom right corner of the configurator should change from "Stopped" to "Running" if the service started successfully.

Managing the Delivery Manager Service

- Right-click the icon to see the available options. Select “Configure” to display the Delivery Manager Configurator.
- Select “Stop” or “Start” to stop or start the Windows service.

  Note: If the Delivery Manager Service is running, then the "Start" menu option will be disabled.
- Select “Exit” to exit the Delivery Manager Configurator.

  Note: Closing the Delivery Manager Configurator dialog does not terminate the application, but it is still running and in the system tray. Exiting the configurator, does NOT stop the Delivery Manager Windows service.

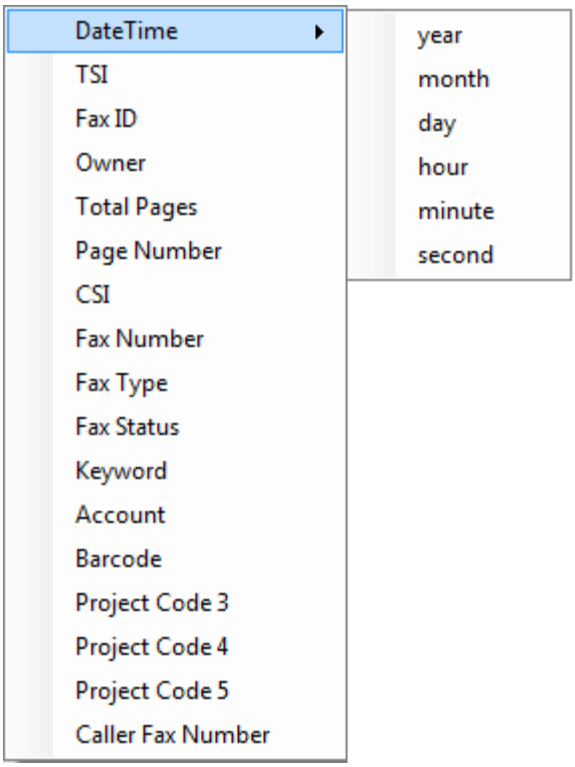
If the Delivery Manager Windows Service is running, the desktop tray icon will change and have a green arrow.

You can also use the Stop/Start Delivery Manager button on the configurator.

Folder and File Naming Scenarios

As described in the previous sections, the location of the faxes and the name of the fax files are dynamic. Metadata related to the fax can be included in the folder path and/or file name. This is accomplished with placeholders.

- To select a placeholder value that will be substituted for fax metadata, put the cursor on the field and right-click. A menu should appear:



- Select the placeholder and it will be entered in the text field surrounded by brackets "[ ]".
- To remove the placeholder, make sure the brackets are deleted along with the placeholder value.

  Note: When the substitution is done, any characters in the Keyword and Account field that is not allowed in a folder path or file name will be removed.

Folders and file names can also have static text. You can simply add the text to the text field.

Shown below is a list of metadata fields with descriptions.

Metadata Field	Incoming or Outgoing	Description
DateTime	both	date/time sent or received
TSI	both	Transmitting Station Identifier
Fax ID	both	Unique identifier for a fax. An incoming fax can have the same Fax ID as an outgoing fax.
Owner	both	Fax user that send fax or fax user that is the recipient of the fax
Total Pages	both	Pages sent or pages received.
Page Number	both	The Page Number placeholder will force the TIFF file to be split into individual page TIFF files. This placeholder is not supported in folder name format or if the output file will be in PDF format.
CSI	both	Called Station Identifier
Fax Number	both	For outgoing faxes, it is the fax number sent to. For incoming faxes, it is the fax number the sender used.
Fax Type	both	Incoming or outgoing. Can be mapped to other text.
Fax Status	both	Sent, Send Failed, Received, Receive Failed. Can be mapped to other text.
Keyword	outgoing	Specified when sending a fax.
Account	outgoing	Specified when sending a fax.
Barcode	incoming	If barcode reading is enabled, then the barcode value can be used as part of the filename. If barcode triage is being used, then multiple barcode values can be used to split the fax document. Splitting is only supported if the output format is PDF, not TIFF.
Project Code 3	outgoing	Specified when sending a fax.
Project Code 4	outgoing	Specified when sending a fax.
Project Code 5	outgoing	Specified when sending a fax.
Caller Fax Number	incoming	ANI string for the sender. This value may not be available.

Below are examples of how to set the Output folder and file format for certain common scenarios.

- Organize faxes by user and then type. Store fax file with fax job id and date:

```
Output Folder: c:/faxes/[owner]/[type]
File Name Format: [id]_[yyyy]-[MM]-[dd]-[HH]-[mm]
```

```
c:/faxes/jdoe/Sent/1_2014-03-01-10-33.pdf
c:/faxes/jdoe/Received/88_2014-02-01-09-55.pdf
```

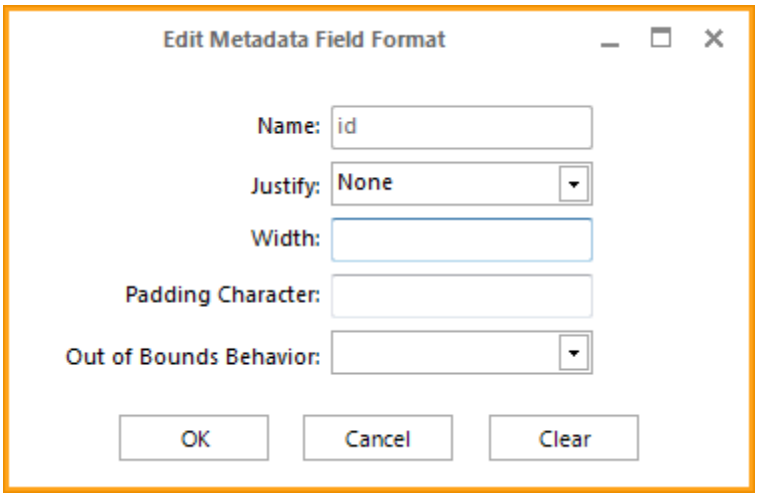
- Organize faxes by day and type. Store fax file with username and jobid.

```
Output Folder: c:/faxes/[yyyy]-[MM]-[dd]/[type]
File Name Format: [owner]_[id]

c:/faxes/2014-02-01/Sent/jsmith_100.pdf
c:/faxes/2014-02-01/Received/jsmith_201.pdf
```

Formatting Metadata

The format of placeholder data can be specified by double-clicking on a placeholder field in the edit box.



Below are examples of how to set the Output folder and file format for certain common scenarios.

- Right justify the fax ID with leading zeros and a width of 8. When the value exceeds 99,999,999 roll-over to 1:

```
File Name Format: [id:R:8:0:R:]
Fax ID of 12345 -> 00012345
```

- Right justify number of pages and fill the value with "X" if the page count exceeds 999:

```
File Name Format: [pages:R:3:0:F:X]
When page count is 10 -> 010
When page count is 1001 -> XXX
```

Troubleshooting

Credential Validation

Message	Cause
FaultCode=1034 FaultText=Invalid authentication credentials	Invalid username or password
There was no endpoint listening at XXXX that could accept the message. This is often caused by an incorrect address or SOAP action. See InnerException, if present, for more details.	Bad URL, Port, or network issue not allowing connection to server. Try running as administrator.
License expired on cloud server for this PC (MAC address: XXXX). Contact Softlinx support to request an extension to the license for this PC. The MAC identifier has been put in the clipboard. Paste into an email message.	Expired License. Contact Softlinx support.
No license on cloud server for this PC (MAC address: XXXX). License not found Contact Softlinx support and request a license for this PC. The MAC identifier has been put in the clipboard. Paste into an email message."	No License Found. Contact Softlinx support.

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