



Fax Loader

Admin Guide

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Introduction

Replix[®] Fax Loader is a Windows service that polls Microsoft Windows file system folders for files to send as faxes using the ReplixFax cloud service or an on-premise ReplixFax fax server.

Replix Fax Loader can monitor folders for individual files to fax or for control files that identify batches of faxes with fax metadata to fax. Configuration options allow the Replix Fax Loader to work with varying control file formats. Fax requests are submitted securely using the ReplixFax Web Services API, so that the Replix Fax Loader can be installed on a server that is not running ReplixFax.

This documentation will guide you through the setup and operation of the Replix Fax Loader application.

Installation Overview

In order for the Replix Fax Loader to install properly, the following prerequisites must be met:

- Supported Operating Systems: Microsoft Windows 2012 and 2008
- User has Windows administration privileges
- Microsoft .Net 4.0 (or higher) is installed on the system

To start the installation, run the Replix Fax Loader setup.exe application. Accept the default installation options. You may install this program and run it on a separate system other than the ReplixFax server system, or on the same machine.

The installation creates a Windows service “Replix Fax Loader” which is set to Automatic startup.

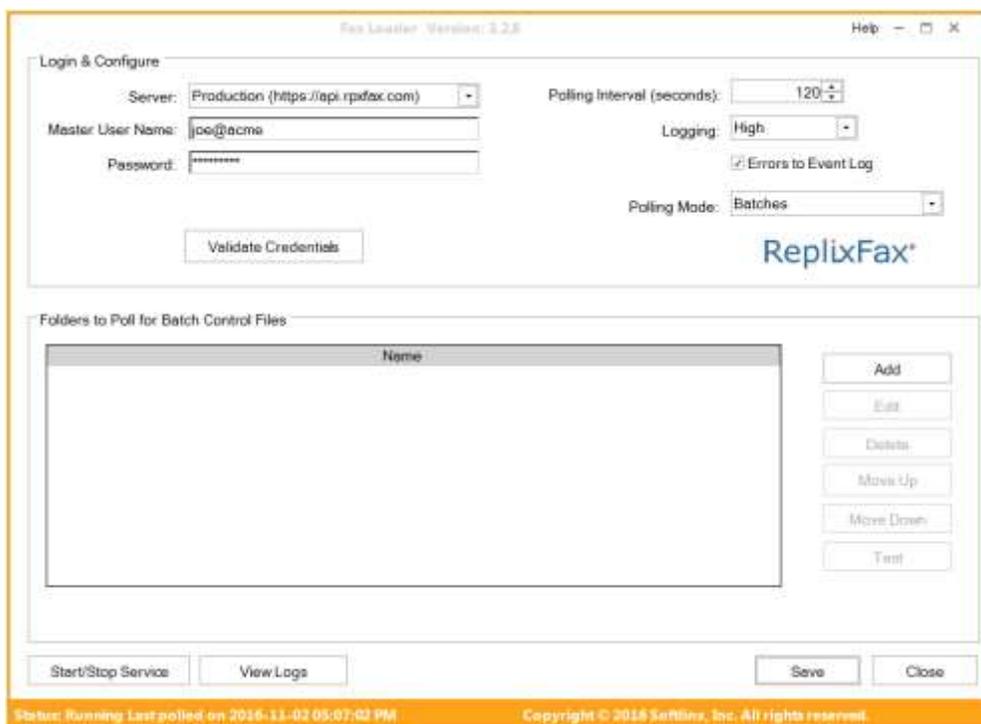
Do not start the service until you have completed all configuration steps.

Configuring the Replix Fax Loader

The Replix Fax Loader will poll folders for batches of faxes or for individual fax files. The fax files will be sent over a secure connection to the ReplixFax cloud service or an on-premise fax server for processing. Follow the steps below to configure the Fax Loader.

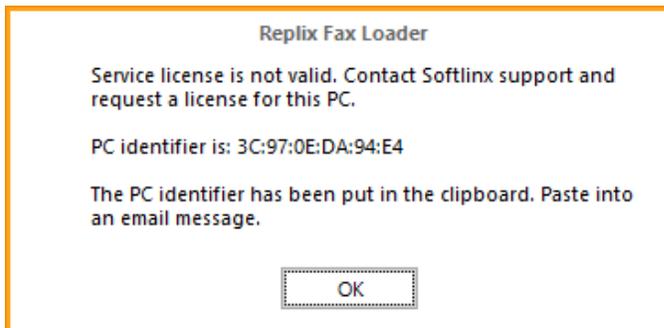
Configuration Steps

1. Start the Fax Loader Configurator Application



2. Select the **Server** to use. You must have an account set up on the server in order for the Fax Loader to submit fax requests to the server.
3. Enter credential into the **Master User Name** and **Password** fields. This name should be in the format: <user>@<company>. These credentials will be provided by Softlinx support.
4. Press the **Validate Credentials** button. If the Fax Loader can contact the server and verify the credentials, it will then check to see if there is a license on the server for the PC running the Fax Loader. If there is no

license, the unique PC identifier will be copied to the clipboard. Paste this into an email and sent it to Softlinx Technical Support (email: help@softlinx.com) to have a valid license added to the server.



5. Specify the **Polling Interval** number of seconds, which is the number of seconds between polling attempts.
6. Set the **Logging** to “High” when first configuring the Fax Loader. This will allow the Fax Loader to log detailed information to facilitate troubleshooting.
7. Select **Errors to Event Log** only to help diagnose issues.
8. Select the **Polling Mode**. The Fax Loader can only operate in a single polling mode. The “Batches” polling mode indicates that the Fax Loader will look for control files in the folder(s). The control files will contain metadata for each fax and identify the location of the fax file. The “Individual Files” polling mode indicates that the Fax Loader will look for individual fax files to send. The metadata for the fax is preconfigured or can optionally be obtained via the fax filename.
9. Add a folder to poll. The information collected for each folder will depend on the polling mode. Each folder is polled sequentially in the order listed in the configurator.

Individual Fax File Processing

When the Replix Fax Loader is configured for Individual Fax File processing, it will poll a specific folder and look for files to send as faxes. Metadata for each fax, such as fax number destination, can be specified in the configuration or can be determined by the fax file name. After a fax file is submitted, it can be moved to another folder or deleted.

The screenshot shows the 'Individual Folder Polling Settings' dialog box. It is a standard Windows-style dialog with a title bar containing 'Individual Folder Polling Settings' and window control buttons (Help, minimize, maximize, close). The dialog is divided into two main sections. The left section contains: 'Folder To Poll:' with a text box and a 'Browse...' button; a checkbox for 'Parse Sub Folders'; two radio buttons for 'Move Files When Done' (selected) and 'Delete Files When Done'; 'Done Folder:' with a text box and a 'Browse...' button; 'Fax File Filter(s):' with a text box and the example '(example: *.*pdf)'; 'Fax File Format:' with a text box; and checkboxes for 'Continue On Error' and 'Auto Recover'. The right section contains: 'Fax Number:' with a text box; 'From:' with a 'Use Pseudo User' checkbox and a '- select user -' dropdown menu; 'Cover Page:' with a 'Use Cover Page Template' checkbox and a dropdown menu; 'Cover Page Message:' with a text box; 'Recipient Name:', 'Recipient Company:', 'Recipient Title:', and 'Recipient Voice:' each with a text box; 'Keyword:' with a text box; and 'Account:' with a text box. At the bottom center, there are 'OK' and 'Cancel' buttons.

Configuration Steps

1. Specify the **Folder to Poll** for fax files. Use the browse button to select the folder. If folders will be created dynamically, then specify a top level folder and select **Parse Sub Folders**.
2. Determine if fax files should be moved to a different folder or deleted after they are submitted. Select the corresponding radio button “**Move Files When Done**” or “**Delete Files When Done**”. If the files will be moved, then specify the **Done Folder**. When files are moved, their extension will be changed to “.success.<fax id>”. For example report.pdf will become report.pdf.success.12345.
3. Specify the **Fax File Filter** to use for identifying which files in the folder(s) should be sent as faxes. For example, if all files in the folder

should be sent as a fax, then use “*” as a filter. If only PDF files should be sent, then specify “*.pdf”. Multiple file filters can be separated by a semicolon “;”.

4. If the name of the fax file will contain metadata such as fax number, then specify the **Fax File Format**. Put the cursor on the Fax File Format field and right mouse click. A list of metadata that can be included in file names will be displayed. Select a metadata item. Each metadata item in the file **MUST** be separated with a “~” character. For example, if the fax file name will include fax number and account, then the file would look like: 15551231234~myaccount.pdf.
5. Select **Continue on Error** if all of the files in a folder should be attempted to be sent regardless of encountering an error. During processing, the fax file will be renamed with a “.processing” extension. If there is an error, then the file will be renamed with an “.error” extension.
6. Select **Auto Recover** to have the Fax Loader attempt to send *.error files when it polls the folder. If this option is not selected and there are errors sending the fax file to the ReplixFax system, then these *.error files will remain in the folder and must be manually dealt with.
7. Specify the **Fax Number** that will be used when sending the fax files. This is a required field unless the fax number will be determined via the fax file name as described in step 4 above.
8. If the faxes should be sent on behalf of a ReplixFax user that is different from the **Master User** specified in the configuration, then select **Use Pseudo User** and pick a user from the list. This option will work only if the Master User has the appropriate privileges to send faxes on behalf of a different user.
9. If you want to use a Softlinx cover page template, then select **Use Cover Page** and select the cover page to use. If you select a pseudo user, then you can optionally select the “Default” cover page. This will cause the default cover page for the user to be used when sending a fax. If a cover page is selected, then additional metadata (**Cover Page Message, Recipient Name, Recipient Company, Recipient Title, and Recipient Voice**) can be specified that will appear on the cover page.

10. Specify a **Keyword** and/or an **Account**. The keyword will be visible when searching for faxes using the web portal or desktop client. The account will be visible in usage reports.
11. Press the “OK” button to close the dialog. Additional folders can be polled. The order of polling will match the order shown in the Fax Loader Configurator. Each item in the list will correspond to a configuration file location in the installation directory.

Batch Processing

When the Replix Fax Loader is configured for batch processing, it will poll a specific folder and look for control files. The control file corresponds to a batch fax job. The format of the control files is determined by the configuration settings.

The control file must contain certain information, including the location of the fax file. Multiple fax files can be listed in the control file. After all of the fax files listed in the control file are processed, the control file is moved to a different folder.

Below are the steps to configure how the Fax Loader should process a folder in batch mode. This behavior is stored in a configuration file that contains **name/value** pairs. Since the Fax Loader can support slightly different control file formats, it is necessary to describe the format of the specific control file.

Configuration Steps (for control file format)

Each control file must be in the following format:

```
<key><delimiter><value>
<common section end>
<key><delimiter><value>
<fax section end>
...
<key><delimiter><value>
<fax section end>
```

All control files must have a common section at the top of the file, even if there are no keys in the common section. Common section can contain key/value pairs for ReplixFax user, cover page template name, and batch name. If present, these values will be used when sending ALL of the faxes identified in the control file.

The actual names of the keys are set via the configuration described below. The separator character between the key and value can also be specified. Typically, this will be the equal sign “=”.

Basic Settings for Processing Behavior

Follow the steps below to configure the basic settings for batch processing.

The screenshot shows the 'Batch Folder Polling Settings' dialog box. It includes the following elements:

- Folder To Poll:** A text input field with a 'Browse...' button to its right.
- File Action:** Two radio buttons: 'Move Files When Done' (selected) and 'Delete Files When Done'.
- Done Folder:** A text input field with a 'Browse...' button to its right.
- Control File Filter:** A text input field.
- Options:** Two checkboxes: 'Continue On Error' and 'Auto Recover'.
- Ignore Fax Number:** A text input field.
- Buttons:** 'OK', 'Cancel', and 'Details...' buttons at the bottom.

1. Specify the **Folder to Poll** for control files. Use the browse button to select the folder.
2. Determine if the control files and local fax files should be moved to a different folder or deleted after they are submitted. Select the corresponding radio button “**Move Files When Done**” or “**Delete Files When Done**”. If the files will be moved, then specify the **Done Folder**. If the fax files are not in the same folder as the control file, then the fax files will not be deleted.
3. Specify the **Control File Filter** to use for identifying which files in the folder are the control files. For example “*.dat”.
4. Select **Continue On Error** if the Fax Loader should continue processing other faxes identified in the control file after encountering an error. For example, a control file can list multiple files and one of them is not found in the folder. If this occurs, the Fax Loader can either stop processing the control file or continue. A control file is renamed to “*.working” while it is being processed. If there are any errors during processing of that control file, the filename will remain with the “.working” extension.

5. Select **Auto Recover** if “bad” control files will be reprocessed during subsequent polling cycles. If not selected, then the local administrator must manually address any control files with a “.working” extension.
6. If any fax number should be ignored, then enter the fax number in the **Ignore Fax Number** field.

Once the basic settings are configured, select the “Details” button to configure in the batch control file format.

Configuring the Batch Control File Format

The screenshot shows the 'Batch Control File Format' dialog box. It is organized into three main panels: 'General Options', 'Common Section', and 'Fax Section'.
- **General Options:** Includes a text field for '*Key/Value Delimiter:' (set to '='), '*Comment Indicator:' (set to '#'), a checkbox for 'Fax Files Have Full Path', a checkbox for 'Send From Different Users', a text field for 'Ignore Keys:', and a dropdown for 'Unique Fax Key:'.
- **Common Section:** Includes checkboxes for 'Cover Page Template', 'Batch Name', and 'From: (fax owner)', and a text field for '*Common Section End:' (set to '@=COMMON').
- **Fax Section:** Includes text fields for '*Fax Number:' (Fax_num) and '*Fax File:' (Fax_file), checkboxes for 'Cover Page Message', 'Keyword', 'Account', 'Unique Fax ID', and '*Fax Section End:' (set to '@=END').
- **Sample Control File:** A preview window showing a sample control file with keys like '@=COMMON', 'fax_num =', 'fax_file =', and '@=END'.
- **Bottom:** Buttons for 'OK', 'Cancel', 'Enable All Keys', and 'Minimum Keys'.
- **Right Side:** Checkboxes for 'Control File will contain Multiple Faxes', 'A Fax will contain multiple files', and 'Show sample data', along with a 'Save Sample File' button.

General Options

1. Typically name/value pairs in a control file are delimited by an equal “=” sign. This can be changed by specifying a different **Delimiter**.
2. A control file may contain comments. Use the **Comment Indicator** as the first character on a line in the control file in order for that line to be ignored.
3. If the fax files will not be in the same folder as the control files, then select **Fax Files Have Full Path**.

4. If faxes will be sent on behalf of specific ReplixFax users, then select **Send From Different Users** check box. If this is selected, then the Master User must have appropriate privileges. Also, each fax section or the common section must contain a key/value pair for the ReplixFax user. Enter the key name in the corresponding field.
5. If there are key/value pairs in the control file that should be ignored by the Fax Loader, list them in the **Ignore Keys** field. Separate each key with a semicolon “;”.
6. In order to uniquely identify a fax in a control file, a combination of one of the keys and the fax number can be used. This is helpful during recovery. For example, this is used when the same fax number can occur in a single control file. Enter the key name that will be in the control file in the **Unique Fax Key** field. The value of the corresponding key in the control file along with the fax number is concatenated to make a unique id.

Common Section

1. If Softlinx cover page templates will be used, then select the **Cover Page Template** check box. If this is selected, then a cover page template will be used. Enter the key name in the corresponding field.
2. If the common section will contain a key/value pair for the name of the batch corresponding to this control file, then select the **Batch Name** check box and enter the key name in the corresponding field.
3. If the fax sender key will appear in the common section, select the **From** check box.
4. **Common Section End** is a delimiter that will be on a line and indicates that the common section is done and subsequent lines will contain fax sections.

Fax Section

1. Enter the key for the destination fax number in the **Fax Number** field.
2. Enter the key for the fax file in the **Fax File** field. This key can be occurring multiple times in the fax section if there is more than one fax file for the fax. If the value in the key/value for the fax file contains

full path information, the **Fax Files Have Full Path** check box must be selected.

3. If the fax sender key will appear in the fax section, select the **From** check box.
4. Faxes can have a **keyword** or **account** associated with them. These values can be specified in the control file. Select the appropriate check box and enter the key names in the corresponding fields.
5. The **Unique Fax Id** is a key that, if set, will uniquely identify a fax in a control file. This should only be used if the generating application can guarantee that the value in the control file for this field is unique.
6. **Fax Section End** is a delimiter that will be on a line and indicates that the fax section is done and subsequent lines will contain additional fax sections.
7. You may specify additional information (**Cover Page Message, Recipient Name, Recipient Company, Recipient Title, and Recipient Voice**) for the recipient, which will appear on the cover page. Select the appropriate check boxes and enter the key names in the corresponding field.

Detailed Batch Processing

The Fax Loader will poll a fax folder for all control files. For each control file it finds it will parse the control file for keys and values representing fax information.

The keys are defined in the configuration file. There can be more than one fax defined in a single control file. As the control file is being processed, its name is changed to “*.working”.

When a control file is successfully completed, it is deleted along with the corresponding fax files. Optionally the control, sent file, and fax files can be moved to another folder and not be deleted. The sent file contains Fax job IDs so this file could be used for a fax completion verification process.

When the Fax Loader is done with all of the control files, it will repeat the above steps for the next folder to poll. Once all folders have been polled, it will stop and wait a configured amount of time before polling the folders again.

Batch Processing Error Handling and Recovery

The error recovery mechanism is controlled by the **auto_recover** parameter. If auto recovery is enabled, then each control file is appended with “.working” as it is processed. If there is an error, the control file’s name is unchanged. When the fax loader starts its next iteration, all *.working files will be processed again.

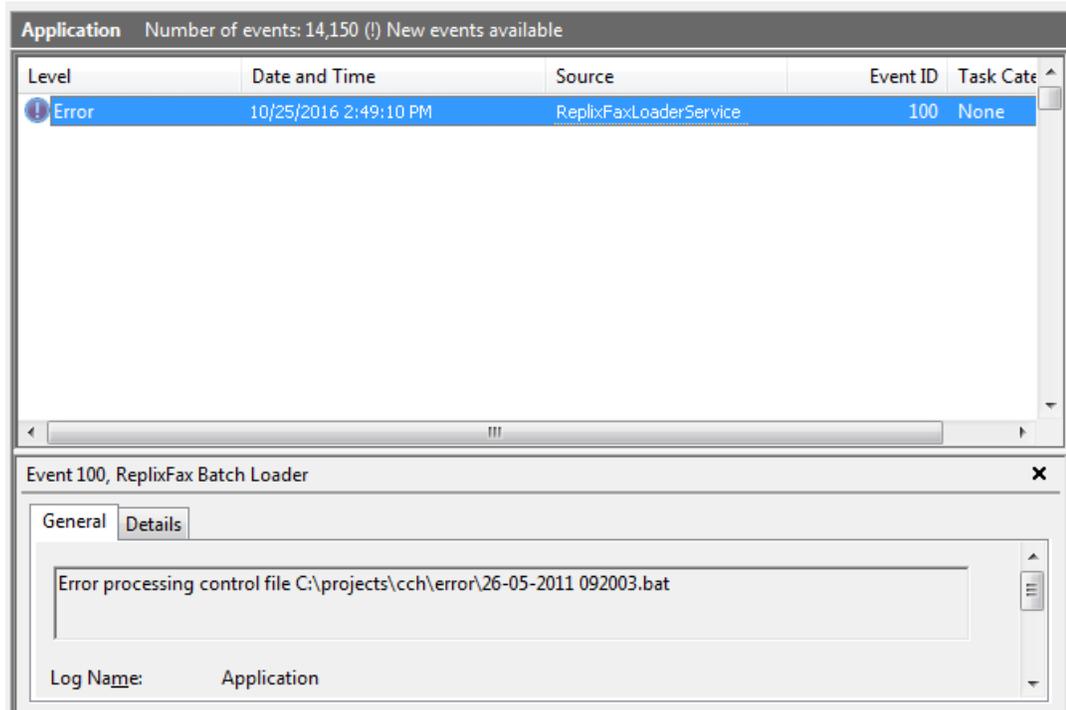
If auto recovery is disabled, then after a control file is processed, if there is an error, the file will be renamed to “*.error”. These error files need to be corrected and then renamed without the “.error” extension. Then they will be picked up by the Fax Loader on its next iteration.

If the configuration setting, **delete_when_done**, is set to false, and there is an issue while moving the control file to the “done” folder, then the control file will be renamed to *.error. An administrator will need to manually address this issue.

After a successful fax request is made to the Softlinx Cloud Service, a *.sent file is created that corresponds to the control file being processed. Contained in the *.sent file will be a line for each fax request made. The recipient fax number will be on each line unless the **key_unique_fax_key** or **key_unique_fax_id** parameters are set. Additionally each line will contain the Fax Job ID (Ex: [FAXID: 123]). If an error occurs when processing subsequent faxes from the same control file, this *.sent file is used to ensure duplicate faxes are not sent when the control file is reprocessed.

Logging is sent to the ReplixFaxLoader.log file. This file will contain all errors and may contain send, info and warning messages depending on the **logging_level** parameter.

The Windows Event Log will contain an Application error for every “bad” control file if the **errors_to_event_log** parameter is set to true.



Event ID will be “100” for control file issues. Event ID will be 200 for configuration or other issues.

A **ReplixFaxLoaderError.log** is also created when there is an error processing a control file. The specific control file with the issue is appended to the file. Note that if auto recovery is enabled and there are errors in a control file, this error file and the log file will grow in size.

On startup of the service, informational information will be added to the event viewer, such as registry values. If there are errors, these too will be in the event viewer.



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