

VSI-FAX 4

**UPGRADE GUIDE
FOR VSI-FAX GOLD SERIES CUSTOMERS**

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FOREWORD

Scope and Intended Audience

This manual provides detailed information about upgrading an existing VSI-FAX Gold Series server and fax clients to VSI-FAX 4.

Typeface Conventions

The following tables show examples of standard typeface styles used in this manual to convey various kinds of information.

EXAMPLE	DESCRIPTION
Click OK . - or - Choose File > Close .	Bold text is used to show actual Graphical User Interface (GUI) menus, commands and buttons. Also note that in the second example, sequential commands are separated by a greater-than (>) character.
Enter vfxadmin...	Bold monospaced text is used to show literal user input that must be entered exactly as it appears in the manual.
<my_filename> - or - <my_password>	Bold monospaced text inside angle brackets shows a type of user input (not a literal user input). Your actual entry will be your file or your personal password.

EXAMPLE	DESCRIPTION
Installation Complete. - or - ...set the VSIFAX variable... - or - ...are stored in \$VSIFAX/spool/dbs	Regular monospaced text is used for file, directory and environment variable names, as well as file entries and displayed messages.

A Word About Unix, Linux and Windows Notation

This manual supports Unix, Linux and Windows platforms. Whenever possible, meaningful examples are provided in all applicable formats. However, in the interest of clarity, directories and filenames are usually given in only one format. In most cases, these are interchangeable between platforms if you remember the following:

Unix and Linux environment variables are prefixed with a dollar sign (\$) ; Windows environment variables are enclosed in percent signs (%).

Unix and Linux path statements use forward slashes (/) ; Windows path statements use backslashes (\).

The following path statements are equivalent:

\$VSIFAX/MY_DIR/my_file	Unix and Linux
%VSIFAX%\MY_DIR\my_file	Windows

Notes

The following kinds of notes appear in this manual:

NOTE: This is a general note. We strongly suggest that you read these as they always contain important information you should be aware of before performing some action.

IMPORTANT: This is a warning. Warnings always contain information that if not heeded could result in unpredictable behavior or loss of data.

TIP: Tips present optional information intended to speed up your work or otherwise enhance your experience with our product. Tips never contain information that will cause a failure if ignored

Obtaining Additional Manuals

The VSI-FAX manuals are available in Adobe Acrobat (.pdf) format in the /docs directory of your installation CD. You can also download manuals in Acrobat format from the VSI FTP site as follows:

1. Connect to ftp.vsi.com.
2. Login in as anonymous
3. Go the /pub/releases/vsifax4 directory.
4. Go the directory for your version (e.g., /latest or /V400).
5. Go to the /docs directory.
6. Download the .pdf files.
7. Complete.

You must have Adobe Acrobat Reader 4.0 installed on your system to view these .pdf files. The Acrobat Reader is available free of charge from the Adobe web site at <http://www.adobe.com>

You can also contact VSI (sales@vsi.com) if you would like to purchase additional printed manuals.

Additional Technical Information

Additional technical information is available from the Technical Support area of the VSI web site. Point your browser to <http://www.vsi.com/support>, then go to the Knowledge Base.

INTRODUCTION

This manual presents important information for persons upgrading their fax server, application integrations or fax clients from VSI-FAX Gold Series to VSI-FAX 4.

IMPORTANT: If you are installing VSI-FAX 4 on a new system, the information in this manual does not pertain to you. Instead, go to the *VSI-FAX Getting Started Manual* for installation and setup information.

You can only upgrade to VSI-FAX 4 from VSI-FAX Gold Series. Direct upgrades from earlier VSI-FAX releases are not supported. Furthermore, this upgrade is only offered to customers participating in a current Premium Care or End User maintenance program.

In order to upgrade, you must obtain a special maintenance key in addition to your existing VSI-FAX Gold Series licenses. For additional information, contact your authorized VSI reseller or VSI Sales at:

(800) 556-4874
sales@vsi.com

Upgrade Overview

IMPORTANT: VSI strongly urges you to read this topic as well as any applicable “see also” information before you perform your upgrade procedure. VSI has spent a great deal of time anticipating your needs and providing answers to commonly-asked questions. If you still have questions after reading this material, contact VSI Technical Support or visit our web site (www.vsi.com).

Fax Server Integrations

Every effort has been made to ensure that strictly server side fax integrations (e.g., command line, tag and batch file, virtual fax server, etc.) are completely unaffected by upgrading from VSI-FAX Gold Series to VSI-FAX 4. In fact, VSI-FAX 4 contains many significant improvements and enhancements specifically designed to improve server side fax integrations.

One important consideration is potential web server port conflicts. VSI-FAX 4 now includes an integrated web server. Our installation program will prompt you for the VSI-FAX web server port assignment. Ensure that the port you enter does not conflict with any existing web servers.

TIP: If you have an existing web server, it may be running on port 80; port 80 is the default port assignment for most web servers. Port 8080 is a common alternate port assignment when two web servers are running concurrently on the same computer or workstation.

See Also

- *Fax Server* (page 7)
- *Profiles* (page 19)

VSI-X Users

The VSI-X fax client is in the process of being phased out in favor of our new cross-platform “universal” fax client.

Our original fax client strategy involved using commercial web browsers to provide a cross-platform faxing solution. Unfortunately, issues relating to Netscape’s Java implementation currently prevent us from certifying our VSI Web Fax Client software for use with Netscape. You may find that it works adequately with your version of Netscape. However, we do not condone nor do we support use of our VSI Web Fax Client software with any version of Netscape.

We recognize that our valued Unix customers still require a graphical fax client. Therefore, we are supporting the use of VSI-X 3.x against a VSI-FAX 4 server. We are not however shipping VSI-X with VSI-FAX 4. You must use the version from your VSI-FAX Gold Series CDROM.

Any defects reported against VSI-X will be fixed by upgrading to the VSI Universal Fax Client. Furthermore, we are not furnishing any new documentation for VSI-X. Please continue using your existing *VSI-FAX Clients Manual*.

See Also

- *Fax Client Overview* (page 10)
- *VSI-X* (page 17)

VSI-WIN Users

The preferred upgrade path for our existing VSI-WIN users is to use version 2.0 of the VSI Outlook Fax Client or VSI Web Fax Client. Both products work well on supported Windows platforms and provide advanced faxing capabilities and tighter integration with the fax server than VSI-WIN provides.

VSI-FAX phone books (directories) are now stored on the fax server. A conversion utility is provided for converting client-side VSI-WIN phone books to server-side VSI-FAX 4 user directories. This conversion takes place during a typical Outlook or web client installation and can also be run standalone after fax client installations.

Because a few VSI-WIN features (client-side tag and batch file integrations, routing to alternate inboxes) were not included in the latest Outlook or web clients, we are supporting using VSI-WIN 3.x with a VSI-FAX 4 server. However, we are not shipping VSI-WIN with VSI-FAX 4 - you must use the version from your VSI-FAX Gold Series CDROM.

Any defects reported against VSI-WIN will be fixed by upgrading to the VSI Universal Fax Client. Furthermore, we are not furnishing any new documentation for VSI-WIN. Please continue using your existing *VSI-FAX Clients Manual*.

IMPORTANT: VSI-WIN uses a client-side fax merge mechanism. Because of a change to the printer driver in version 3.5, client-side fax merge is no longer supported. However, older versions of VSI-WIN do still provide this functionality.

See Also

- *Fax Client Overview* (page 10)
- *VSI-WIN* (page 13)
- *Profiles* (page 19)

VSI-TERM Users

Strictly character-based platforms are dwindling in popularity. For this reason, VSI has made a strategic decision to focus on graphical fax clients in order to better serve our entire customer base. Therefore, VSI-TERM has been discontinued. If you still require a character-based fax client, use FxMemo.

Be aware that FxMemo phone books are completely incompatible with server-side VSI-FAX 4 directories. For this and many other reasons, we strongly urge our customers to move to one of our graphical fax clients.

See Also

- *Fax Client Overview* (page 10)
- *VSI-TERM* (page 13)
- *Appendix A - FxMemo* (page 23)

Outlook Users

Your VSI-FAX 4 CDROM includes a new version of our VSI Outlook Fax Client. Version 2.0 provides a fax printer driver (for printing to fax from within Windows applications), a custom Outlook form for composing faxes directly from Outlook and a fax status applet.

You can only use Outlook in “Corporate or Workgroup” mode; “Internet Only” mode is not supported under any circumstances. Use of a Microsoft Exchange Server is optional. However, if you want to use the custom fax form you must be using Outlook with an Exchange server.

Upgrades to version 2.0 are seamless and highly recommended. Version 1.0 (also known as “VSI Outlook Fax Integration”) will not work with VSI-FAX 4.

See Also

- *Fax Client Overview* (page 10)
- *VSI-FAX Outlook Fax Integration* (page 12)

VSI-Web Users

Your VSI-FAX 4 CDROM includes a new version of our VSI Web Fax Client. Version 2.0 provides advanced fax feature and functions.

Upgrades to version 2.0 are seamless and highly recommended. Version 1.0 (also known as “VSI-WEB”) will not work with VSI-FAX 4.

VSI-FAX 4 includes an integrated web server. Therefore, any existing web server previously setup for exclusive use of VSI-WEB is no longer required. You may uninstall it at your discretion.

See Also

- *Fax Client Overview* (page 10)
- *VSI-WEB* (page 13)

Documentation

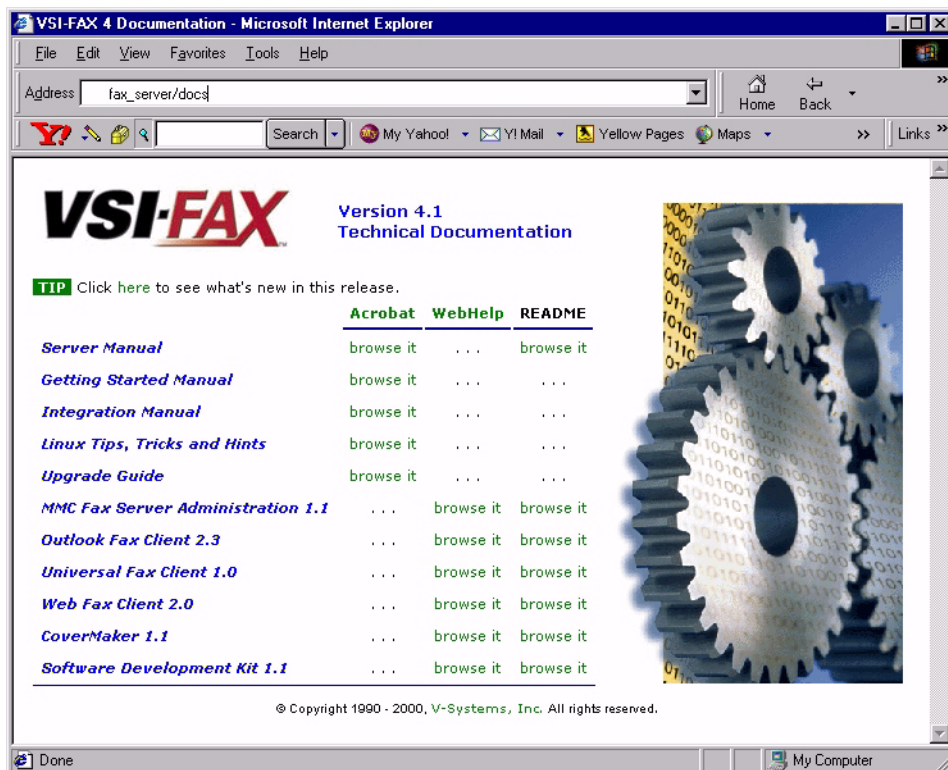
VSI-FAX 4 introduces many important changes to the technical documentation.

Clients Manual Discontinued

The *Clients Manual* has been discontinued in favor of online help. VSI felt that this was a better overall information delivery strategy because online help files are always installed on each user's computer, whereas a single printed manual might not be readily available to the user needing immediate technical assistance.

Integrated Online Help

VSI-FAX 4 provides integrated browser-based online help as part of the basic fax server installation. Following successful fax server installation, simply point your web browser to `<fax_server>/docs` to view our manuals and online help from any computer networked to the fax server.



TIP: You can also access the online help prior to installation by pointing your browser to the /docs directory of your VSI-FAX 4 CD-ROM.

Adobe Acrobat

Adobe Acrobat Portable Document Format (PDF) is an online file format that maintains complete page fidelity (layout, fonts, etc.) with the original printed document. VSI has chosen this format as the best way to include our hardcopy manuals in the online documentation set.

WebHelp

WebHelp is an HTML-based cross-platform help format that uses either ActiveX (for Internet Explorer 4.x and higher) or Java controls to provide table of contents, index and search capabilities. WebHelp look and feel is nearly identical to the Windows online help files provided with each fax client and the help content is identical.

You must be running an ActiveX or Java-enabled browser in order to view WebHelp. Microsoft Internet Explorer 5.0 or higher is recommended. Microsoft Internet Explorer 3.x thru 4.x and Netscape 4.x are also supported.

PRODUCTS

This chapter discusses various issues and considerations regarding upgrades of your existing VSI-FAX products to the latest versions provided on your VSI-FAX 4 CD-ROM.

Fax Server

While VSI-FAX 4 introduces many new features and improvements to the VSI-FAX engine, VSI has made every effort to ensure that existing fax server integrations are not adversely impacted by upgrading from VSI-FAX Gold Series to VSI-FAX 4.

The remainder of this topic discusses the differences between VSI-FAX Gold Series to VSI-FAX 4 servers.

Installation

VSI-FAX 4 server installs directly on top of an existing VSI-FAX Gold Series server without any known issues and one caveat for customers using more than four fax ports on the same fax server.

If you have more than four fax ports installed and configured on the same fax server, you will need additional port licenses. Contact the VSI sales team (sales@vsi.com) for additional information.

All VSI-FAX Gold Series server phone books, dial string parameters, databases and user information is preserved during the upgrade.

Web Servers

VSI-FAX 4 includes an integrated web server. If you already have an existing web server running on the fax server host, be aware that port conflicts could be an issue. Our installation program will prompt you for the VSI-FAX web server port assignment. Ensure that the port you enter does not conflict with any existing web servers. The VSI-FAX web server port assignment is set in the `$VSI_FAX/webserver/conf/httpd.conf` file.

This is an example `httpd.conf` port entry that assigns a web server to port 80:

```
Port 80
```

Administration Tools

VSI-FAX 4 introduces many new features and functions that cannot be adequately administered via VSI-MENU. Instead, VSI-FAX 4 introduces an entirely new fax server administration tool, VSI MMC Fax Server Administration.

VSI MMC Fax Server Administration uses the open architecture of the Microsoft Management Console (MMC) to administer *any* VSI-FAX server on your network (even Unix fax servers) from any Windows NT computer on your network. You can also save your MMC configuration file and share it with others. This is extremely useful for administering multiple fax servers for large enterprises.

As with previous versions of VSI-FAX, you can still administer your fax server via the command line on any platform. Furthermore, VSI-MENU is still provided so that Unix and Linux users can still administer some fax server features and functions via a graphical user interface.

Obsolete Tags

VSI-FAX has implemented a robust and expanded printing and email functionality. You can now independently control automatic printing of routed faxes, sent fax status and received faxes. You can also independently set the email attachment format for routed faxes, sent back faxes and email received faxes.

This required the introduction of new and separate tags for each of these features. It also required eliminating support for the following tags:

TAG	DESCRIPTION
aps	Formerly, “auto-print sent faxes.” Replacement tags are: apr and vpr to control auto-printing of routed faxes and received faxes, respectively.
cfm	Formerly “print sent fax status.” Replacement tag is spn .
gif	Formerly “email as separate GIF files.” Replacement tags are: rfm , sfm and vfm to control routed fax format, sent back fax format and email received fax formats, respectively.

Important Windows File Types Information

Beginning with version 4.1, VSI-FAX servers running on Windows NT/2000 implement an important enhancement - native imaging for all registered Windows file types. In other words, rather than use file viewers to image files for faxing, VSI-FAX now images faxes using the native windows application via Dynamic Date Exchange (DDE). This is accomplished via the windows “registration” mechanism that associates an application with a particular file extension in the Windows registry.

This new imaging mechanism is more reliable and accurate. However, problems can occur if your existing fax integration uses a file extension that Windows associates with another application. If this is the case, your faxes will not image properly and may “hang” during imaging. Therefore, it is essential that you eliminate all conflicts between your fax integration file types and file associations in the Windows environment. You can do this two ways:

- Ensure that all file extensions used by your integrations conform to the file associations in the Windows registry
- Use unregistered file extensions for your fax integrations

TIP: Command line integrations can force the fax server to image a file as a particular file type by including the **-F <file_type>** on the **vfx** command line. Tag and batch file integrations can accomplish this by including the **ftp=<file_type>** tag. Note however that your choice of file type is limited to the basic imaging file types (i.e., ASCII text files, PCL 5e files, Epson printer files, PostScript Level 1 files and TIFF group 3 or group 4 files).

Refer to the *VSI-FAX Integration Manual* for additional information about command line, tag and batch file fax integrations.

vfxpb Utility

In order to implement several advanced directory (phone book) features in VSI-FAX 4.1, the **vfxpb** utility has been obsoleted in favor of a new utility - **vfxadmin pb**.

IMPORTANT: Do not run **vfxpb** against VSI-FAX 4 servers - loss of data could result.

In order to prevent loss of data, the **vfxpb** utility now displays a warning message and requires direct operator intervention in order to run. However, you can turn off the warning message by invoking **vfxpb** with the **-s** (silent) option. For example:

```
vfxpb -s create
```

Fax Client Overview

VSI-FAX 4 implements a new simplified fax client strategy. There are now three preferred fax clients:

- VSI Outlook Fax Client 2.2 (formerly VSI-FAX Outlook Integration)
- VSI Web Fax Client 2.0 (formerly VSI-WEB)
- VSI Universal Fax Client 1.0

Outlook Fax Client

We expect the VSI Outlook Fax Client (Outlook fax client) to be the desktop fax client of choice for Microsoft Exchange users. The Outlook fax client runs on all 32-bit Windows platforms (Windows 95, Windows 98, Windows NT 4.x and Windows 2000).

The Outlook fax client requires Outlook 97, 98 or 2000 running in “Corporate or Workgroup” mode; “Internet only” mode is not supported under any circumstances. Refer to your Outlook documentation for information about configuring Outlook for “Corporate or Workgroup” mode.

NOTE: The reason the Outlook fax client will not work with Outlook in “Internet only” mode is that our fax technology requires the full MAPI DLLs, which are only installed when you configure Outlook for “Corporate or Workgroup” mode.

The preferred way to use the Outlook fax client is to use Outlook with a Microsoft Exchange Server. Although this is the preferred configuration, the Exchange Server is not required. However, if you run Outlook without an Exchange Server, you will not have access to the custom fax form.

Universal Fax Client

The VSI Universal Fax Client (universal fax client) is feature-rich, cross-platform java-based desktop faxing application. Incorporating a design that facilitates easy deployment, coupled with performance comparable to a native desktop application, the universal fax client excels in environments where power users demand functionality and the administrator seeks centralized management.

The universal fax client runs on any platform that supports a version 1.1.7 or higher Java Runtime Environment (JRE). It requires VSI-FAX server 4.1 or higher and connects to the fax server via HTTP (i.e., the internet or your corporate intranet).

Web Fax Client

The VSI Web Fax Client (web fax client) runs on any platform that supports Microsoft Internet Explorer 4.x or higher. Although the web fax client provides a limited set of fax features, it is an excellent choice when these features will suffice because it is so easy to deploy - no installation is required unless you need print-to-fax capabilities. Also, the web fax client can fax from location with an internet connection to the fax server.

VSI-X and VSI-WIN

VSI-X and VSI-WIN will work against a VSI-FAX 4 server. However, VSI is in the process of phasing out these clients in favor of our new cross-platform “universal” fax client.

VSI-TERM is no longer supported. If you require a character-based fax client, use FxMemo. FxMemo (page 23) is a character-mode fax client that provides limited desktop faxing capabilities for users running in a character-mode (e.g., VT100) environments.

The following table shows which new fax client should be implemented to replace obsolete or soon to be obsolete VSI-FAX Gold Series fax clients:

GOLD SERIES CLIENT	VERSION 4 CLIENT	REMARKS
Outlook Fax Integration	Outlook Fax Client 2.2	Version 2.2 provides a new fax message form for faxing directly from Outlook.
VSI-WEB	Web Fax Client 2.0	Version 2.2 provides new features and functions as well as an enhanced user interface.
	Universal Fax Client 1.0	The universal fax client provides more features and functions than the web fax client and runs on nearly every platform that supports web browsers.
VSI-TERM	Web Fax Client 2.0	Use the web fax client on a graphical platform for desktop faxing.
	Fxmemo	Use FxMemo to access a limited subset of desktop faxing features directly from a character mode terminal.
VSI-WIN	Outlook Fax Client 2.2	If you use Outlook, use the Outlook fax client for desktop faxing.
	Universal Fax Client 1.0	If you do not use Outlook and want a full-featured desktop fax client, use the universal fax client for desktop faxing.
	Web Fax Client 2.0	If you do not use Outlook, do use Internet Explorer as your web browser and can use a limited fax feature set that is accessible anywhere you have an internet connection, use the web fax client for desktop faxing.

NOTE: You can also continue to use VSI-WIN with the VSI-FAX 4 server.

GOLD SERIES CLIENT	VERSION 4 CLIENT	REMARKS
VSI-X	Universal Fax Client 1.0	Use the universal fax client for desktop faxing.
NOTE: You can also continue to use VSI-X with the VSI-FAX 4 server.		

VSI-FAX Outlook Fax Integration

The new Outlook fax client is essentially version 2.2 of the VSI-FAX Outlook Fax Integration. It comprises a fax printer driver (for printing to fax from within Windows applications), a custom Outlook form for composing faxes directly from Outlook and a status applet.

The new fax form provides tighter integration to Microsoft Exchange directories and largely eliminates the need to know MAPI fax syntax when sending a fax.

Upgrades from version 1.x to version 2.2 should be seamless. However, if you want to use the new VSI fax form and status applet, you must be using Outlook in “Corporate Workgroup” mode with a Microsoft Exchange server on your network.

The Outlook fax client requires Outlook 97, 98 or 2000 running in “Corporate or Workgroup” mode; “Internet only” mode is not supported under any circumstances. Refer to your Outlook documentation for information about configuring Outlook for “Corporate or Workgroup” mode.

NOTE: The reason the Outlook fax client will not work with Outlook in “Internet only” mode is that our fax technology requires the full MAPI DLLs, which are only installed when you configure Outlook for “Corporate or Workgroup” mode.

The preferred way to use the Outlook fax client is to use Outlook with a Microsoft Exchange Server. Although this is the preferred configuration, the Exchange Server is not required. However, if you run Outlook without an Exchange Server, you will not have access to the custom fax form.

VSI-WEB

The new web fax client is essentially version 2.0 of VSI-WEB. It provides worldwide access to your enterprise's fax data. With the web fax client, you can create, send, track and view faxes from any supported web browser.

VSI-FAX 4 provides an integrated web server. Therefore, VSI-WEB's requirement of having an existing web server is no longer applicable.

The web fax client requires no installation, simply point your browser at the fax server (by entering the fax server host name in the browser Address/Location field) and log on. You can immediately send and receive faxes. If you also want to print to fax from within other applications, download the fax printer driver.

Currently, the web fax client is supported on Microsoft Internet Explorer version 4.x or higher (version 5 recommended). Although the web fax client uses Java technology, it is intentionally designed to use only basic features and functions provided by most Java Runtime Environments (JREs).

VSI-TERM

VSI-TERM has been obsoleted and there is no direct replacement for it. FxMemo (page 23) provides some limited desktop faxing capabilities for character mode platforms. If you require additional desktop fax capabilities, you must run the web fax client from a graphical web-enabled computer or workstation.

All existing server side phone books and user configurations are retained during the fax server upgrade. All client side phone books will be lost unless you explicitly export them using **vfxpb unload** and upload them to user phone books on the fax server using **vfxpb load**.

VSI-WIN

There are three possible direct replacements for VSI-WIN: the Outlook fax client, the universal fax client and the web fax client.

If you use Outlook, use the Outlook fax client for desktop faxing.

If you do not use Outlook and want a full-featured desktop fax client, use the universal fax client for desktop faxing.

If you do not use Outlook, do use Internet Explorer as your web browser and can use a limited fax feature set that is accessible anywhere you have an internet connection, use the web fax client for desktop faxing.

You can also continue to use VSI-WIN with the VSI-FAX 4 server.

The remainder of this topic describes how various VSI-WIN features and functions are implemented in the new Outlook and web fax clients.

Send Applet

VSI-WIN	OUTLOOK FAX CLIENT	UNIVERSAL FAX CLIENT	WEB FAX CLIENT
To - Fax Number field	Recipient's fax number can be entered directly into the To... field using MAPI fax notation (i.e., <name> [fax:<fax_number>]). Refer to the Outlook fax client online help for additional information.	Recipient's fax number can be entered directly into the To... field using special notation (i.e., specially placed ampersand (@) symbols). Refer to the universal fax client online help for additional information.	Recipient's fax number can be entered directly into the To... field using special notation (i.e., specially placed ampersand (@) symbols). Refer to the web fax client online help for additional information.
To - Company field	Not supported.	Recipient's company name can be entered directly into the To... field using special notation (i.e., specially placed ampersand (@) symbols). Refer to the universal fax client online help for additional information.	Recipient's company name can be entered directly into the To... field using special notation (i.e., specially placed ampersand (@) symbols). Refer to the web fax client online help for additional information.
Coversheet	Fax Message form Cover Page tab.	Fax Options Cover Page tab.	Create! Fax form Cover Page tab.
Phonebook - Group	Outlook recipient lists.	Directory group entries.	Directory group entries.
Options	Fax Message form Sending Options tab.	Fax Options Sending Options Page tab.	Create! Fax form Sending Options tab.
Attachments	Fax Message form Attachments tab. User attachments are still available but they are called local attachments. System attachments are now called server attachments.	New fax message Local attach... and Server attach... buttons. User attachments are still available but they are called local attachments. System attachments are now called server attachments.	Create! Fax form Attachments tab. User attachments are still available but they are called local attachments. System attachments are now called server attachments.
Phonebooks	Outlook Address Book and Contacts folder.	Directory.	Directory.

VSI-WIN	OUTLOOK FAX CLIENT	UNIVERSAL FAX CLIENT	WEB FAX CLIENT
External Phonebooks	Not supported. If you are using the Outlook fax client, you must store your fax recipients in the Outlook Contacts folder or Personal Address Book.	Lightweight Directory Access Protocol (LDAP) directories are supported. Refer to the VSI MMC Fax Administration online help for additional information.	Not supported.
vsifax.ini File	Outlook fax client session preferences are stored on the fax server in the user profile (page 19).	Universal fax client session preferences are stored on the fax server in the user profile (page 19).	Web fax client session preferences are stored on the fax server in the user profile (page 19).
Save As Defaults button	Not supported.	Not supported.	Not supported.

Connection Applet

The connection applet is no longer required. The Outlook fax client automatically connects to the default fax server as required. The default fax server is specified during installation and maintained via the Outlook **Tools > Services** feature.

The universal fax client provides a log in dialog box so you can connect to the fax serve you want to use for that session.

The web fax client connects to any fax server the browser is pointed to. If you use several fax servers, you can bookmark these URLs for future use.

Status Applet

The Outlook fax client provides an improved fax status applet that is automatically launched whenever you send a fax. You can also view any sent fax via your Outlook Sent Items folder.

The universal fax client provides an Outbox. When you select a fax in the outbox, you get status on that fax but it is not continuously updated. You can also double-click a fax in the outbox to launch a standalone status applet that does provide continuously updated status for that fax.

The web fax client provides an Outbox. You can get fax status and initiate retries from this Outbox but you cannot view sent faxes.

Viewer Applet

The Outlook fax client uses the multi-page TIFF viewer supplied with Windows (e.g., Wang Image Viewer).

The universal fax client provides thumbnail views of your faxes. To view them full size, you must setup an external TIFF file viewer. This is extremely simple (browse to the file viewer executable and click **Save**) and free TIFF file viewers are available for most operating systems.

The web fax client provides an integrated viewer with zoom and rotate features.

Phone Books

Local user phone books are automatically converted and uploaded to the fax server during fax client installation or when the web fax client printer driver is installed.

The only consideration remaining is web fax client users who do not install the fax printer driver. If they want to use the information in their local phone books to send faxes, they must manually migrate their phone books to the fax server by running the VSI-WIN migration utility (page 29).

Refer to *Directories (Phone Books)* (page 19) for additional information.

Fax Merge

Fax merge has been implemented using new a form file syntax and transport mechanism. Existing fax merge implementations will not work with VSI-FAX 4. Refer to *Fax Merge* (page 20) for additional information.

Integrations

None of the new replacement fax clients can be invoked from the command line. If you have integrated VSI-WIN directly into another business application and invoke it from the command line, you must consider another solution (e.g., autosend directory, **vfx** commands, etc.) before upgrading to VSI-FAX 4.

TIP: You may want to consider using the new VSI Software Development Kit (SDK) as in integration tool for these situations. The SDK provides sample Visual Basic and Visual C++ applications that demonstrate how to add basic fax functions to existing business applications.

Departmental (alt) Inboxes

None of the new replacement fax clients provide departmental (alt) inboxes nor do they support routing of faxes from one inbox to another.

VSI-X

The universal fax client is a full-featured desktop fax client that runs on any platform that supports a version 1.1.7 or higher Java Runtime Environment (JRE). It requires VSI-FAX server 4.1 or higher and connects to the fax server via HTTP (i.e., the internet or your corporate intranet).

You can also continue to use VSI-X with the VSI-FAX 4 server.

CoverMaker

CoverMaker 2.0 is an improved version of CoverMaker 1.0. There are some minor enhancements to cover pages.

All cover pages, created with any version of CoverMaker use the same underlying file format. Cover pages created with CoverMaker 1.x upgrade seamlessly to CoverMaker 2.0 and VSI-FAX 4.

TIP: Because all versions of CoverMaker write to the same underlying file format, you can use CoverMaker 2.0 to create cover pages for use with VSI-FAX Gold Series fax servers. However, be aware that if you include any new tags added in version 4 on your cover pages, that these cover pages will not work with VSI-FAX Gold Series fax servers.

FEATURES

This chapter discusses various issues and considerations related to key feature and function support between older VSI-FAX products and the new products provided on your VSI-FAX 4 CD-ROM.

Directories (Phone Books)

Phone books are called "directories" in some products in order to more closely agree with prevailing terminology.

All VSI-FAX directories (phone books) are now stored on the fax server. During new fax client installations, existing VSI-WIN phone books (previously stored on each client computer) are covered and automatically transferred to the server. Entries from existing user phone books are flagged as belonging to that user in order to ensure privacy.

Profiles

Profiles are a new way to view and administer a broad spectrum of user settings and privileges. Instead of storing all user settings and privileges in a user-by-user basis, profiles store these settings so that a small number of profiles can be applied to a much larger group of users.

Eventually, VSI-FAX will support group profiles. However, in this release, you are limited to user profiles and the (default) master profile. You can control which properties users inherit from the master profile and whether or not users can modify their' own profile settings, on a property-by-property basis.

Because profiles did not exist in previous versions of VSI-FAX, upgrade impact is minimal. The (default) master profile is created at installation time.

Fax Merge

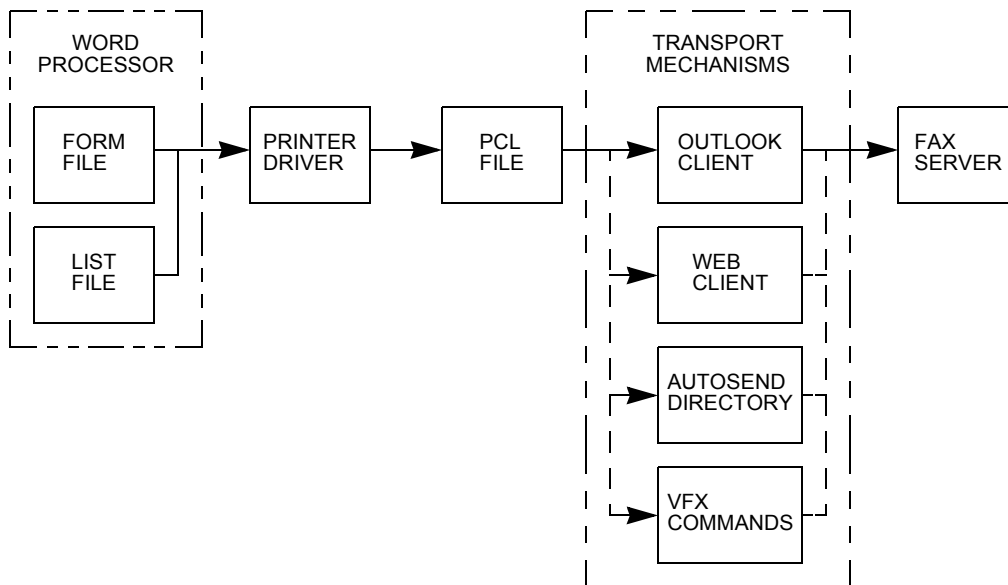
VSI-FAX 4 adds some important changes and enhancements to fax merge that are intended to make it more scalable.

The syntax of the form file has changed - you now must use embedded tags in your form files and only certain tags are supported. Embedded fax tags use this format:

```
@+TAG [<tag>=<value>]
```

Destination information, followed by a page break, must be embedded in the form file before any other content.

When you initiate the fax merge from your word processing application, a single PCL file is created containing all fax pages to all recipients.



This single file is sent to the fax server for processing, via any of the transport mechanisms, with “FAXMERGE” as the recipient. “FAXMERGE” is case-insensitive.

When the fax server receives a fax with the recipient “FAXMERGE,” it creates a group fax job, begins parsing the PCL file, stripping out the destination information and imaging the fax pages.

WordPerfect Macros

Because many of our customers want to fax enable WordPerfect on Unix, we have created two new WordPerfect macros for use with our fax printer driver.

IMPORTANT: WordPerfect macros provided with previous versions of VSI-FAX are not compatible with VSI-FAX 4.

X Windows Versions

This VSI integration for WordPerfect 7/8 is only designed to work with graphical X Windows versions of WordPerfect. Also earlier versions of WordPerfect may work but have not been tested.

The graphical integration consists of these files.

<code>faxwpx.sh</code>	Script that builds a UI and faxes document.
<code>vsipclx.prs</code>	Printer driver for WordPerfect.

Character-Based Versions

This VSI integration for WordPerfect 7/8 is only designed to work with non-graphical (character-based) versions of WordPerfect. Also earlier versions of WordPerfect may work but have not been tested.

The non-graphical integration consists of these files.

<code>vsi.wpm</code>	WordPerfect macro that calls the imaging and faxing script.
<code>faxwpc.sh</code>	Script used for imaging and faxing.
<code>vsipcl.prs</code>	PCL printer driver for WordPerfect.
<code>wpc.config</code>	Configuration for defining <code>vsiwp.sh</code> .
<code>vsiwp.env</code>	Environment settings needed by <code>faxwpc.sh</code> ; created from the <code>wpc.config</code> script.

APPENDIX A - FxMEMO

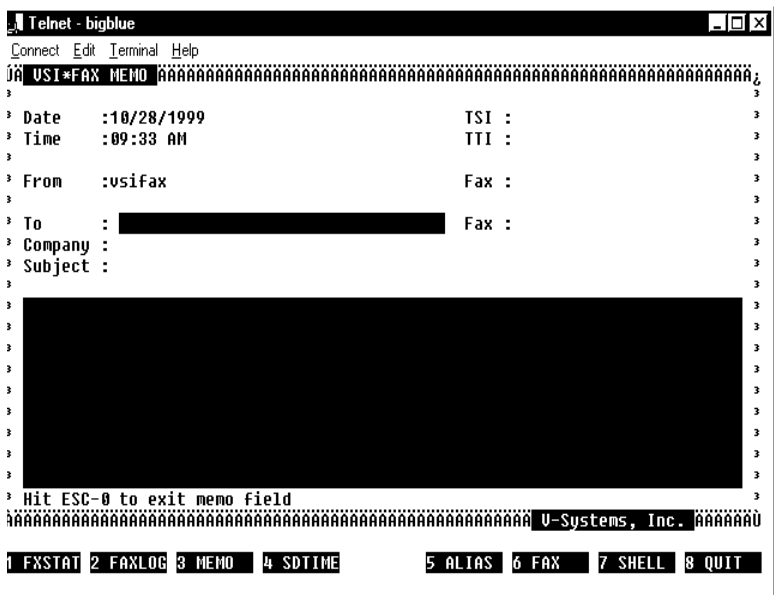
FxMemo is a character-mode fax client that provides limited desktop faxing capabilities for users running in a character-mode (e.g., VT100) environment.

You can:

- Send a fax to a single recipient
- Use “pre-saved memos” to create fax templates
- Assign recipient information to an “alias”

You cannot:

- Send a group fax
- Use VSI-FAX phonebooks



The screenshot shows a Telnet window titled "Telnet - bigblue". The interface is a character-mode application with a menu bar at the top: "Connect Edit Terminal Help". Below the menu bar is a header line: "JA VSI*FAX MEMO". The main area displays a form for creating a fax memo. The form fields are as follows:

Date	:10/28/1999	TSI	:
Time	:09:33 AM	TTI	:
From	:vsifax	Fax	:
To	:	Fax	:
Company	:		
Subject	:		

Below the form fields is a large black rectangular area, likely a placeholder for a memo or a redacted section. At the bottom of the main area, it says "Hit ESC-0 to exit memo field". The footer of the application shows a status bar with the text "U-Systems, Inc." and a series of numbered menu options: "1 FXSTAT 2 FAXLOG 3 MEMO 4 SDTIME 5 ALIAS 6 FAX 7 SHELL 8 QUIT".

Running FxMemo

1. If you are running on a remote client, telnet into the fax server.
2. Log on to the fax server using a valid fax user account.
3. Enter the following:

```
fxmemo
```

FxMemo appears.

4. Complete.

Function Keys

Eight function keys are displayed along the bottom of the screen. In most cases, you can access them by pressing the corresponding function key on your keyboard (e.g., **F1** thru **F8**). However, some telnet programs (e.g., Windows Telnet) don't support this. If you find that pressing your function keys does not work, try pressing **ESC**, then the function key number. For example, to quit your FxMemo session, press **ESC**, then **8**.

TIP: If neither of the two previous methods work for accessing function keys, this method always works: press **CTRL-F** plus the function key number (e.g., **1**). For example, the entire sequence for the **F1** key would be **CTRL-F-1**. You must complete the entire key press sequence within approximately three seconds.

Attaching Files

You can attach one or more files to your fax. However, the only way to do this is via one or more “include” statements in the Memo field. Each file you want to attach requires a separate include statement. Furthermore, file attachments must be local and the include statement must include the full file specification (i.e., full path and file name).

For example, to attach `MyFile.txt`, located in the `/Temp` directory to a fax, add this include statement to your Memo field:

```
// /Temp/MyFile.txt
```

Press **F0** when your fax message (including attachments) is completely entered in the Memo field.

Sending a Fax

1. Run FxMemo (page 24).
2. Enter a recipient name in the To field, then press **TAB**.
3. Enter a recipient fax number in the Fax field, then press **TAB**.
4. Enter a recipient company name in the Name field, then press **TAB** (optional).
5. Enter a short subject line in the Subject field, then press **TAB** (optional).
6. Enter a fax message in the Memo field, then press **F0** (optional).
7. Press **F6** to send the fax.

The following message appears in the status area:

FAX - Are you sure? (Y/N)

8. Press **Y** to send the fax or **N** to not send the fax.
9. Complete.

Pre-Saved Memos

Pre-saved memos provide a convenient way to save a fax so that you can send a similar fax another time.

Saving Memos

1. Run FxMemo (page 24).
2. Send your fax (page 25).
3. Press **F3**.

The memo function keys replace the standard function keys.

4. Press **F6** to save this memo.
5. Enter a name for this memo in the Save As field, then press **RETURN**.
6. Complete.

Recalling Memos

1. Run FxMemo (page 24).
2. Press **F3**.

The memo function keys replace the standard function keys.

3. Press **F3**.
4. Enter a directory in the Directory field.

To view pre-saved memos in the current working directory, enter:

./

A list of pre-saved memos in that directory appears on the right.

5. Press **TAB** until the memo you want to use is highlighted.
6. Press **F4**.

Your pre-saved memo is loaded.

7. Send your fax (page 25).
8. Complete.

Aliases

Aliases are a way to save fax recipient information in a simple database for later recall. When you define an alias, you save the recipient's name, company name and fax number and assign a alias name to it. When you recall that alias, these FxMemo fields are populated with that information.

Defining Aliases

1. Run FxMemo (page 24).
2. Enter a recipient name in the To field, then press **TAB**.
3. Enter a recipient fax number in the Fax field, then press **TAB**.
4. Enter a recipient company name in the Name field, then press **TAB** (optional).
5. Press **F5**.

The alias function keys replace the standard function keys.

6. Press **TAB** until the cursor is in the key field.
7. Enter a short alias name in the Key field.
8. Press **F6** to save this alias.
9. Complete.

Recalling Aliases

1. Run FxMemo (page 24).
2. In the To field, enter ! followed by the alias name.
3. Press **RETURN**.

The To, Name and Fax fields are populated with information.

4. Complete.

APPENDIX B - VSI-WIN MIGRATION UTILITY

Your VSI-FAX 4 CD-ROM includes a migration utility for converting and uploading local user phone books and user preferences to the fax server as part of an overall migration from VSI-WIN to either the Outlook fax client or the web fax client.

Typically, this utility runs in the background during web fax client and Outlook fax client installations. However, if the utility cannot locate the existing VSI-WIN installation, you will be asked to browse to that location. At that time you also have the option of not running the utility (by closing the common browse dialog box before you browse to the existing VSI-WIN installation).

If you decide to not run the utility during installation, you may have to run it standalone in order to convert and upload local user phone books and user preferences to the fax server, otherwise you will lose this information. The default location for this utility is:

```
C:\Program Files\Common Files\VSI Shared\PBConvert.exe
```

Requirements

In order to run the VSI-WIN migration utility, you need the following pieces of information:

- VSI-WIN directory
- Your fax account user ID
- Fax server host name

IMPORTANT: The VSI-FAX 4 server must be running.

If you run the utility standalone, you must also choose which fax client (i.e., Outlook fax client or web fax client) you want to use the existing VSI-WIN data. If you want to use VSI-WIN data with both clients, two utility sessions are required.

Synopsis

```
PBconvert.exe /User=<user_ID> /Server=<host_name> /Path=<VSI-WIN_dir>  
/Conversion={web | outlook} [/Silent={true | false}]  
[/UserProfile={true | false}] [/Help]
```

Options

NOTE: All command line options are optional. If you do not supply command line options, **PBconvert.exe** displays a Graphical User Interface (GUI).

PBconvert.exe accepts the following options:

<code>/User=<user_ID></code>	Fax account user ID.
<code>/Server=<host_name></code>	Fax server <host_name> .
<code>/Path=<VSI-WIN_dir></code>	Full path to the VSI-WIN directory.
<code>/Conversion={web outlook}</code>	If web , VSI-WIN phonebooks and user preferences are converted and uploaded to the fax server. If outlook , VSI-WIN phonebooks are converted and loaded into the Microsoft Exchange database and are visible in Outlook; user preferences are converted and uploaded to the fax server.
<code>/Silent={true false}</code>	Optional. If true , run utility in silent mode if all required information is supplied via command line options.
<code>/UserProfile={true false}</code>	Optional. If true , convert and upload VSI-WIN user preferences to the user profile on the fax server.
<code>/Help</code>	Optional. Displays online help for the utility.

Caveats and Notes

If the utility is called by the Outlook fax client installation program, Outlook cannot be running. This will cause the conversion to be very slow.

TIP: If you are running the utility standalone, start Outlook before running the utility. The conversion will be much faster.

Many installations of VSI-WIN do not have all the necessary registry entries required to locate the VSI-WIN directory. Therefore, it is likely that a Browse dialog box will appear asking for the location.

TIP: A fast way for you to locate the existing VSI-WIN directory is to choose **Find** from the **Start** menu and search your local hard drives for `vsifax.ini`.

VSI-WIN phonebook entries are exported to the following files:

<code>Persons.csv</code>	Comma-Separated Values (CSV) file containing the person entries from your VSI-WIN phonebook.
<code>Groups.csv</code>	CSV file containing the group names from your VSI-WIN phonebook.
<code>Members.csv</code>	CSV file defining which persons belong to which groups.
<code>OutlookPersons.csv</code>	Essentially <code>Persons.csv</code> formatted for cleaner import into the Outlook Contacts folder.

TIP: These CSV files are not deleted after the utility finishes the conversion. They are an excellent backup copy of the information in your VSI-WIN phonebook and can also be used to import this information into other programs.

Groups are imported as distribution lists in Outlook 98 and 2000 but not Outlook 97. If you want your groups to be imported as distribution lists, upgrade to Outlook 98 or 2000. However, each group member is imported as a Contact entry in all versions of Outlook.

Three error logs, `PersonsErrorLog.txt`, `MembersErrorLog.txt` and `GroupsErrorLog.txt`, are generated any time the utility is run. If these files are empty following completion of the conversion process, then conversion and upload to the fax server was successful. The `ConversionLog.txt` file details the progress of the entire conversion.

APPENDIX C - RUNNING CONCURRENT VERSIONS OF VSI-FAX SERVER

Some upgrade strategies may require running both the previous version and the latest version of VSI-FAX on the same machine. While this is not optimum, it can be accomplished.

Caveats

- This only works on Unix
- You *cannot* run both versions at the same time

Basic Procedure

IMPORTANT: This should only be attempted by advanced system administrators.

1. Shut down VSI-FAX Gold Series.
2. Install VSI-FAX 4 into a different location than 3.x.
The remaining steps explain how to switch from one version to the other.
3. Shutdown the currently-operating fax server.
4. Change the following environment variables and preference file entries to point to the version you want to run:
 - (a) PATH environment variable.
 - (b) VSIFAX environment variable.
 - (c) /etc/vsifax3.sh file.
 - (d) /etc/inetd.conf file.

5. Start the fax server.
6. Complete.