Open Text RightFax Secure Documents Module

Implementation Guide

Fax and Document Distribution Group
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The Challenge

Information workers today face numerous challenges when it comes to collaborating and exchanging files with other parties. They would like to use email to exchange those files since the platform has become so easy and ubiquitous. They want to make sure the file is sent securely so that only the intended recipients can see the file and they want an audit trail showing when that recipient viewed it. And they have applications that generate files and documents to be exchanged with the same requirements as their personally created files.

Email, though convenient, fails on these requirements in many ways. The size limits placed on files in email systems often preclude them as a viable document exchange platform. There is little to no security on the lines between the sender and the receiver, so there is no way to know if someone on the way viewed the information. And the lack of an audit trail on attachments means that the sender won't know if even the smaller files ever reach their destinations.

Traditional fax is sometimes seen as a solution for these problems, but the ability to edit or leverage the text in those documents is lost without an additional OCR process. FTP could be a solution to some of the problems, but it is definitely not what anyone would call ubiquitous, requiring specialized knowledge to be able to use it. Corporate IT departments are also reluctant to setup FTP sites because the documents either stagnate, or it's too difficult to restrict who can upload to the site.

One Possible Solution: Managed File Transfer

One set of solutions that has arisen in the last few years is the use of free or low-cost web-based file sharing applications. These are websites that allow the anonymous sharing of a file or folder with anyone the uploader sends a link to. The sites use a something akin to "security through obscurity", not revealing a file without the specific URL. Typically they do not have any additional security: if you have the right URL, you have complete access to the document as well. These sites are not the same as often legitimate file sharing services like BitTorrent, but can be blocked by IT just the same. To make things worse, there is rarely any manageability of those documents. In essence, they bypass every single layer of security an IT group might put into place if the services are even allowed.

The Better Solution: OpenText RightFax Secure Documents Module

What is often surprising to IT departments is that they may have already implemented a solution to this problem when they added OpenText RightFax to their offering. One of its features is certified delivery, which is also known as OpenText RightFax Secure Documents Module (RightFax SecureDocs). SecureDocs provides all of the benefits of the file-sharing sites, with none of the weaknesses. It also leverages the ubiquity of email and the security and auditing features built in to RightFax. An internal user simply works with their normal faxing application to send a document. RightFax will email a URL pointing to an automatically generated web page hosting just that one document.

How to Send and Receive a Document

To send a certified delivery document the end user opens their usual faxing application. In this example we will use FaxUtil, but it could just as easily be Outlook or the Lotus Notes client. For more information about using certified delivery from other clients, refer to the technical documentation provided with RightFax. From the New Fax Addressing dialog, simply enter the recipient's email address and check the certified delivery checkbox.
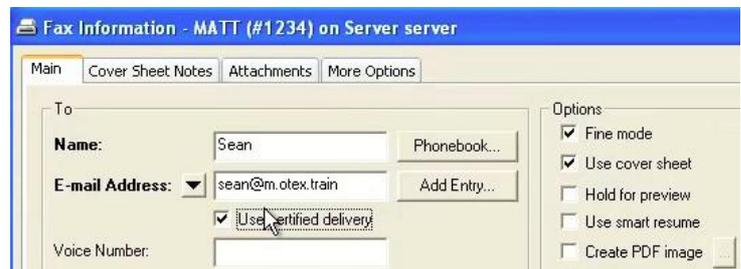
Depending on the options chosen on this tab and the attachments tab, the document can
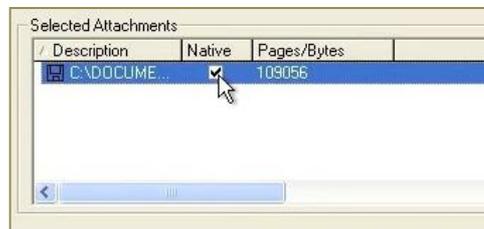
be sent in its original format, as a PDF document, a secured PDF, or as a standard TIFF file like any other fax. To get a PDF, check the Create PDF Image checkbox under Options on the right side. For the secured PDF, click the ellipsis button to the right of the checkbox. To have the original file sent, check the Native checkbox on the Attachments tab.

When Send is clicked, RightFax will create the site and send the URL. The document will then be added as a sent message in FaxUtil.

The recipient on the other end will receive a simple email telling them to visit a special website to retrieve their document. The website, which can be customized, asks for a password in order to let the user in.

After logging in, a list of documents sent to that address, which have not yet been deleted, will be presented to the recipient.
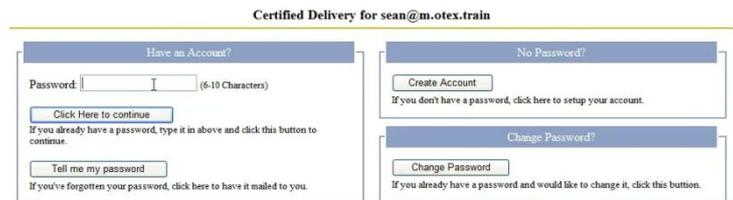
Any documents the recipient wishes to keep should be saved locally since the sender can delete documents from FaxUtil whenever they choose.

How to Implement

Although certified delivery can be installed on the same server as RightFax, it is always recommended to run web-based applications on separate hardware. You will need to make sure that the web server on which you install certified delivery is directly accessible from the Internet.

Implementation of Certified delivery is extremely simple. First make sure your license covers certified delivery. If you choose to install the feature but you are not licensed for it, certified delivery will not run. If your license includes certified delivery, choose RightFax certified delivery under Web Applications from the Select Features dialog.

After your RightFax installation is complete and you have verified you can send and receive faxes, go to the eTransport settings in the Server module. Here you can enter your SMTP server address and a username and password if they are required. Below that you can enter the Web Server address. The text you enter here will be part of the

URL that the recipient gets in an email when you send a certified delivery document.
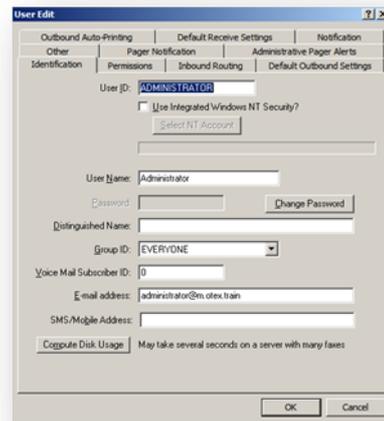

The final step is configuring an email address for the person sending a certified delivery document. This is done from the User Edit dialog in Enterprise Fax Manager. Go down to the E-mail address field and enter the appropriate email address.

Now the user can send a document using certified delivery to anyone in the world. Just follow the steps at the top of this document to send a certified delivery fax.

Customization of the certified delivery Web Site

At first glance, you might think that the default certified delivery website is a bit plain and uninteresting. It is in fact, extremely flexible and customizable as can be seen in these
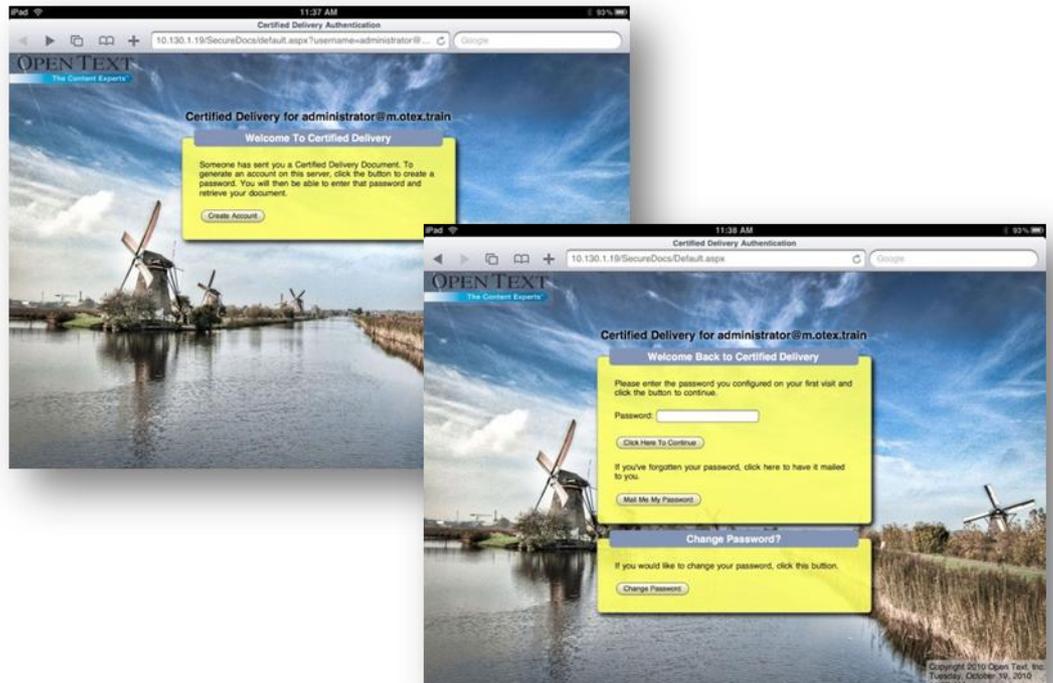
screen shots.

To achieve something like this, only a few changes need to be made to a few files. Before making any changes though, make sure you have a backup of the entire RightFax WebApps directory, just in case. Also, if you implement any of the changes listed below, make sure you change just one thing at a time and then test it immediately. If you change a dozen things and then the site breaks, it's very difficult to figure out what exactly caused things to stop working. Sometimes a very simple typo in the wrong spot can cause major problems. Never make any changes like this on a live system unless you have tested it on a non-production system first.

The rest of this document will cover some of the different changes that can be made to the certified delivery site. They will be listed in the order of complexity starting with the easiest modifications first.

All of the files you will want to change can be found at this path (assuming you did not change the installation directory).

`C:\Program Files\RightFax\WebApps\CertifiedDelivery`

Change the Logo

Out of the box, the certified delivery website has a Captaris RightFax logo on a white background. This can very easily be changed by uploading a new image in its place. The image you want to replace is in the Images subdirectory and is called CertDoc_Header.gif. Make sure you replace it with another GIF file. There is no required size for the header, but it should be roughly 200 pixels wide by 50 pixels high. When you replace the image, the site might not display your new image. If so, there may be a permissions error. Make sure the local Users group has access to read the file. This can be done by right clicking on the file and choosing Properties. From the Security tab, you should be able to add Users and accept the default permissions of Read and Read & Execute. Now the image should be displayed correctly.

Change the Copyright Text

The copyright text can be found in the CertifiedDelivery.Master file. Seven lines from the bottom is a line that starts with `<asp:Label`. Replace the text inside the quotes after `Text=` to show anything you want.

Add a Background Image

Adding a background image can be done by simply editing the Default.css file. At the top of the file is the word body followed by a {. Everything between the { and } defines the overall CSS styles in place for the website. To add a background image, enter the

following lines between the braces:

```
background-image:url('yourimagefile.jpg');
background-repeat:no-repeat;
background-size:auto auto;
```

To ensure that the page still loads quickly, resize the image to a size as small as possible that still has enough resolution to see the level of detail that you need. You should experiment to figure out what that is. Also, change the quality of the jpg file. Sometimes a lower quality setting doesn't make much difference in visible quality. If you want to use a smaller tiled pattern, you could change the background-repeat line accordingly. Do a search for background-repeat css on the Internet to learn about the different options for this setting.

Selectively Display Options Depending On Whether User Exists

This is a more advanced modification. If you are not familiar with modifying ASP.Net code-behind pages, its best to leave this to someone who is. That said, this modification only requires defining one function, and adding a few div tags to a web page.

The first step is to override the Page_Load method in the Default.aspx page. Rather than giving you the ability to easily break your system, the code has been provided as an image.

The first line of the method is to call the base.Page_Load method. This calls the Page_Load that is in the certified delivery DLL. Next is the connection string. You will need to change the connection string to something that is valid on your system. If the recipient has logged in to certified delivery before, there will be a row in the database with the corresponding email address. If we find an address, then the box that allows a person to create a password disappears. Otherwise the other two boxes disappear.

```
<%@ import Namespace="System.Data" %>
<%@ import Namespace="System.Data.SqlClient" %>
<script runat="server">
void Page_load(object sender, EventArgs e) {
  base.Page_Load(sender,e);
  string connString="server=server;database=rightfax;uid=sa;password=password";
  string commandText = "select count(*) from SecureDocsContacts where WM_EMail='" + SessionInfo.Destination +"'";
  SqlConnection connect = new SqlConnection(connString);
  SqlCommand command = new SqlCommand(commandText,connect);
  connect.Open();

  int UserExists = Convert.ToInt32(command.ExecuteScalar());

  if (UserExists>0)
    NoPassword.Visible = false;
  else{
    HasAccount.Visible = false;
    ChangePassword.Visible=false;
  }
  connect.Close();
}
</script>
```

Now add the correspond div tags around the fieldset tags in the ASP:Content. For example, the first PanelFrame fieldset is for entering a password when you already have an account. So enter `<div id="HasAccount" runat="server">` immediately before `<fieldset class="panelFrame">`. After the `</fieldset>` tag, add a `</div>` to close out that tag. If any of that didn't make sense, get an ASP.Net developer to do this for you.

Now add the corresponding div tags for the NoPassword and ChangePassword sections mentioned in the If block in the code above.

To change from two columns to one, change the two mentions of floatLeft in the file to floatCenter and add the following block to your default.css file:

```
.floatCenter
{
  margin-left:auto;
  margin-right:auto;
}
```

To change any of the text that shows up on the page, make the appropriate edits in the Default.aspx page.

Add Rounded Corners, Transparency, and Shadows to the Boxes

To add these features, the new options in CSS3 were leveraged. These are only visible to the newest browsers. For help, look online for the CSS keywords `border-radius, box-shadow, background:rgba`. Usually typing `css box-shadow` into a web search engine will get you plenty of help on the topic.

Summary

Certified delivery, or SecureDocs, is an incredibly powerful tool for sharing large amounts of information with colleagues and partners. It provides a level of security, auditing, and compliance that simply is not available with most ad-hoc file sharing tools available on the market. The fact that it's built in to OpenText RightFax, a solution you have already implemented, makes it even more powerful and accessible. With a few simple tweaks to the existing pages, you can make the existing out-of-the-box feature of the product into a completely customized and secure file sharing solution.

About OpenText

OpenText is the world's largest independent provider of Enterprise Content Management (ECM) software. The Company's solutions manage information for all types of business, compliance and industry requirements in the world's largest companies, government agencies and professional service firms. OpenText supports approximately 46,000 customers and millions of users in 114 countries and 12 languages. For more information about OpenText, visit www.opentext.com.

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