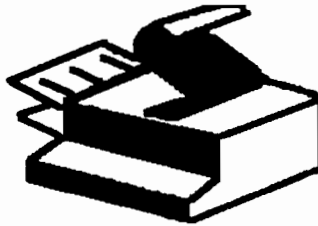


HP OfficeFax Installation



HP Part No. 5959-9669
Printed in USA June 1990

First Edition
E0690

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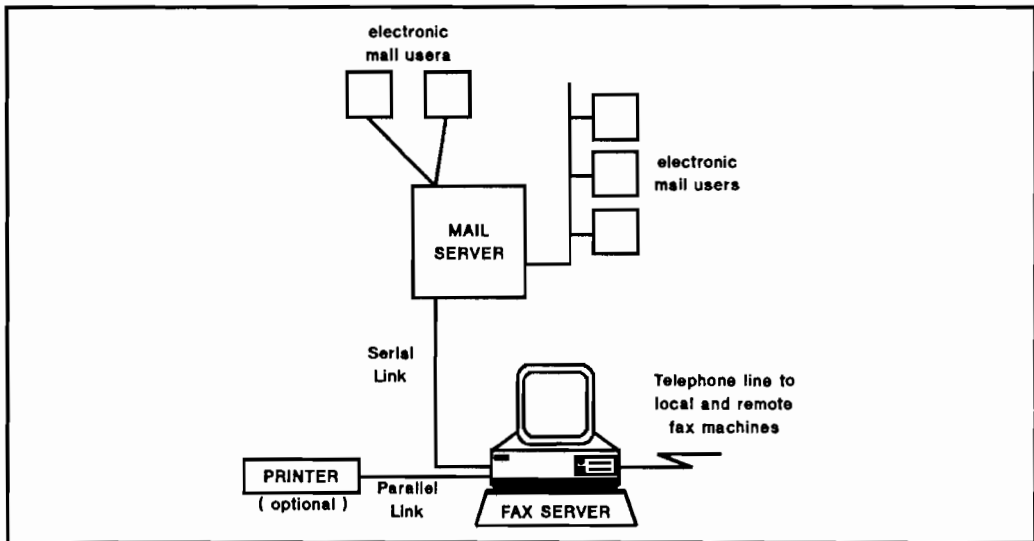
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About this Manual

Use this manual to install and set up HP OfficeFax. It tells you how to:

- Prepare the mail server.
- Prepare the fax server.
- Install the fax server software.
- Establish a connection between the fax server and mail server.
- Configure the fax server.
- Create a customized title page for outgoing faxes.
- Tell your users of the new service available to them.



The HP OfficeFax System

To prepare the mail server, you need *System Administrator* capabilities, and some knowledge of configuring gateways and routing messages.

To prepare the fax server, you need some knowledge of the MS-DOS operating system.

After working through this manual, refer to the *HP OfficeFax Administration* manual for information on the day-to-day administration of HP OfficeFax.

Your Comments

If you have any suggestions on ways in which we can improve this manual, please write to:

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System Overview

HP OfficeFax provides existing electronic mail users with direct access to the Group III facsimile network, worldwide.

Users no longer need to print off their messages and take them to a conventional fax machine for transmission. With HP OfficeFax, existing electronic mail users simply include fax addresses (telephone numbers) as foreign addresses in the distribution list of their message and mail it in the normal way. The message is then transferred to the fax server through the mail server's fax gateway.

On the fax server, the message is converted to Group III facsimile format and a pre-configured title page added. The fax joins the queue of faxes waiting to be transmitted. If the receiving fax machine is busy, or the line is noisy, the fax server will try to send the fax again. If the fax cannot be sent, the original message is returned to the sender with an explanatory message.

The fax server can be used to receive incoming faxes from other fax machines. If a printer is attached to the fax server, the incoming faxes can be printed. Alternatively, incoming faxes can be routed to a local fax machine for printing.

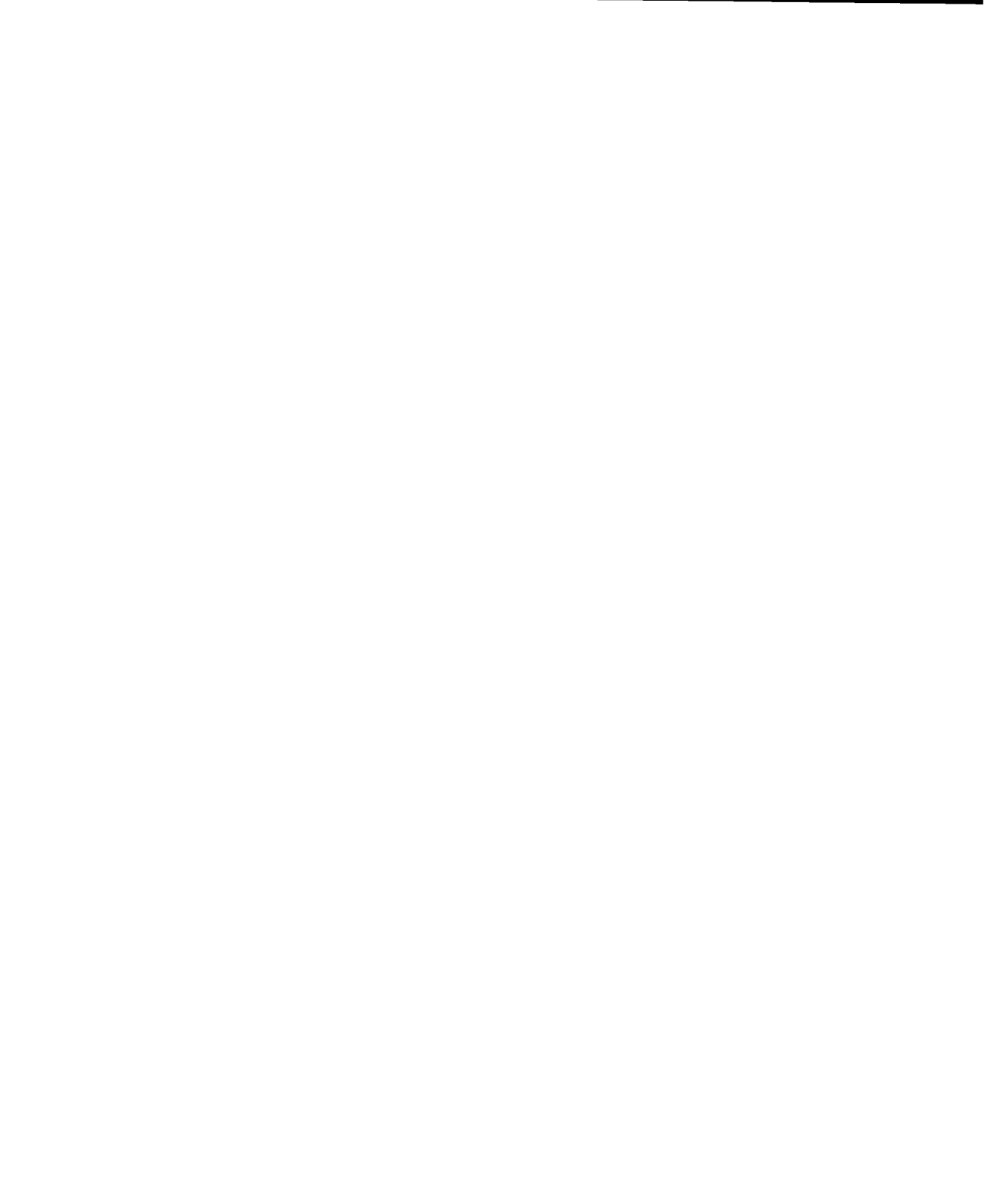
The fax server works in two modes. Normally it is in Server Mode where the status of outgoing and incoming faxes are displayed. Occasionally, you may need to change to Administration Mode where individual faxes can be manipulated.





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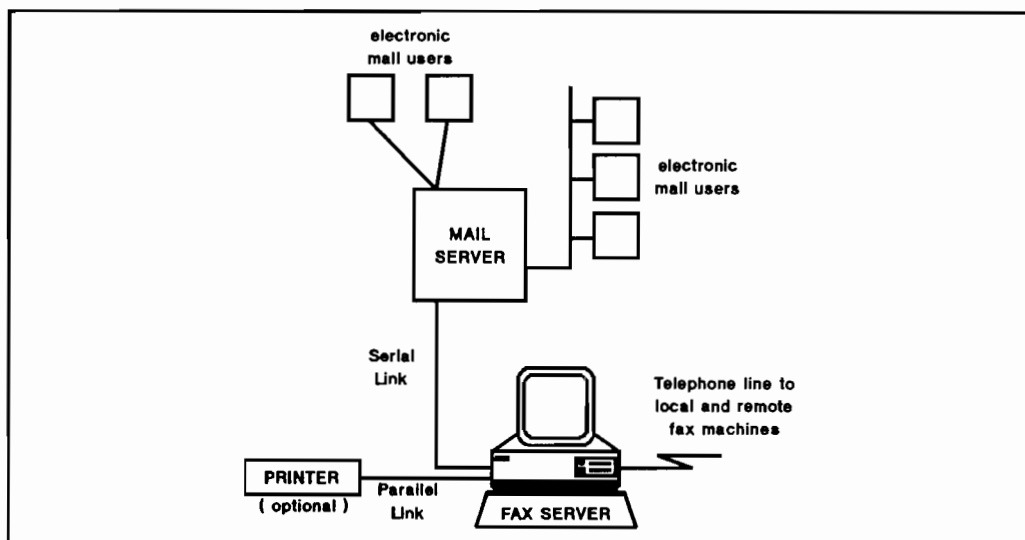


Installation—An Overview

This chapter gives a brief overview of what is involved in installing and configuring HP OfficeFax.

The HP OfficeFax system uses an existing mail server and a dedicated personal computer (the fax server).

A gateway is set up on the mail server to handle the messages that are sent to the fax server. The fax server is connected to the mail server using a serial connection. The fax server is also connected to the telephone system, using one or more GammaFax CP/T boards and software. In addition, one or two printers can be connected to the fax server for printing incoming faxes. Alternatively, if no printer is connected to the fax server, incoming faxes can be routed to a local fax machine for printing.



The HP OfficeFax System

To install HP OfficeFax:

1. Set up a fax gateway on the mail server.
2. *Optional*—Set up routes from remote mail servers to the fax gateway.
3. Install, configure, and test one or more GammaFax CP/T boards and software on the fax server. (The number of boards you install will depend on the number of available expansion slots on the fax server and the volume of faxes you expect to send and receive.)
4. Connect the fax server to the mail server with a serial cable.
5. *Optional*—Connect one or two printers to the fax server.
6. Install the HP OfficeFax software on the fax server.
7. Check the connection between the fax server and the mail server.
8. Configure the following on the fax server:
 - How incoming faxes are processed.
 - How outgoing faxes are processed.
 - Any printers that are connected.
 - The size of the Sent and Received Logs.
9. *Optional*—Create a customized title page to be added to all outgoing faxes.
10. Tell your users of the new service available to them.

Preparing the Mail Server

This chapter tells you what must be done to the mail server before HP OfficeFax can be used with it.

HP OfficeFax can be used with either the HP DeskManager or the HP OpenMail mail server. The installation procedure varies depending on which version of the software you have purchased—*HP OfficeFax for HP DeskManager* or *HP OfficeFax for HP OpenMail*.

To prepare the mail server you must set up a fax gateway. A gateway is a means of allowing messages to enter and leave the mail system. You may also want to configure routes from other mail servers in your system to the fax gateway.

The remainder of this chapter is divided into two sections:

- Preparing the HP DeskManager mail server.
- Preparing the HP OpenMail mail server.

Preparing the HP DeskManager Mail Server

HP OfficeFax is supported on HP DeskManager version B.03.B0 or later running on MPE/V or MPE/XL.

For the serial connection to the fax server, Advanced Terminal Processor (ATP) ports or Distributed Terminal Control (DTC) ports are required for MPE/V and MPE/XL based machines respectively. The port should be configured as Term Type 10, SubType 0. That is, a hardwired rather than a modem type port.

Note



Before continuing, read the text file `DESKINFO.TXT` on the HP OfficeFax *Setup/Windows Build Disk* for version specific information.

The remainder of this section *outlines* the procedure for setting up a fax gateway in HP DeskManager and routing messages through this gateway. Refer to your *HP DeskManager Administration* manuals for detailed instructions.

To configure a fax gateway in HP DeskManager:

1. Create an empty file called `INTRNFLG.MAILDB.HPOFFICE` if it does not already exist. This file must exist before you can configure a fax gateway. For example, as `MGR.HPOFFICE`, type:

```
BUILD INTRNFLG.MAILDB.HPOFFICE
```

If you have to create this file, you must shutdown and then restart HP DeskManager before the existence of the file will have any effect.

2. Ensure that the User Defined Command (UDC) `MAILGATEINTON` has been issued by `MGR.HPOFFICE`.

The UDC `MAILGATEINTON` must be run each time HP DeskManager is started.

3. Run the HP DeskManager Configurator by typing `MAILCONFIG`.

4. At the Location Information screen, add a remote location (mailnode) for the fax gateway. The location code you use must be unique in the network. If possible, use the location code **FAX**.
5. At the Hierarchically Addressed Locations screen, make the location hierarchically addressed.
6. If other mail servers in your network want to use the fax gateway:
 - The new fax mailnode must be added to their database.
 - A route must be configured to the fax mailnode through the computer on which the fax gateway is configured.
7. From the Network menu, press **Other Options** and display the IGateway menu, and configure a “Programmatically Accessible Gateway”—an intrinsics gateway.
 - Give the gateway a name, for example **FAX**
 - *Optional*—Assign a password for the gateway (8 characters).
 - Add the gateway.
8. At the Route Information screen, route the mailnode to the fax gateway.
9. If there is no Default User for undeliverable messages already configured for the local system, go to the Local Control Data Information screen and specify one.
10. Return through the menus and exit the Configurator.

Preparing the HP OpenMail Mail Server

HP OfficeFax is supported on HP OpenMail version A.00.01 or later, running on HP-UX. To use HP OfficeFax with HP OpenMail version A.00.00 additional files are required. These are available from your Hewlett-Packard representative. Further information is given in the text file **OMINFO.TXT** on the HP OfficeFax *Setup/Windows Build Disk*.

Note



Before continuing, read the text file **OMINFO.TXT** on the HP OfficeFax *Setup/Windows Build Disk* for version specific information.

The fax gateway used by HP OfficeFax is available on the HP OpenMail installation tape or cartridge. The gateway will normally be installed automatically when HP OpenMail is installed or updated. To check which gateways are already on your system, use the following command (you will need to be logged in as either an HP OpenMail Administrator or superuser):

```
/usr/openmail/bin/omstat -s
```

If **Fax Gateway** is not listed, you must install it from the HP OpenMail installation tape or cartridge. Refer to your HP OpenMail installation manual for details.

The fax gateway must also be enabled. To enable the gateway, use the following command (you will need to be logged in as either an HP OpenMail Administrator or superuser):

```
/usr/openmail/bin/omon -s FAX
```

After ensuring that the fax gateway is on your HP OpenMail system and enabled, give the user **fax** a password—this will be used later by the fax server. For example, as superuser, type the following and respond to the prompts:

```
passwd fax
New password:
```

If other mail servers in your network want to use the fax gateway, then those mail servers must have a route to the fax gateway added to their system.

Note

The fax server is connected to the mail server using a serial connection. You must ensure that a terminal port (not a modem type port) using a line speed of 9600 baud is configured in your Unix system. Refer to your Unix manuals for information about configuring ports.

The line characteristics used by the port are given in the file `/etc/gettydefs`. These line characteristics must match those used by the HP OfficeFAX command files. Search for the first line in this file that begins 9600. For the line characteristics to match those of the default command files supplied with HP OfficeFAX, the line should be as follows:

```
9600# B9600 HUPCL PARENB CS7 # B9600 SANE PARENB \  
CS7 ISTRIP IXANY TAB3 #login: #a number
```

If the line in your `/etc/gettydefs` file does not match the above line exactly, you should add the following line to the file:

```
FAX# B9600 HUPCL PARENB CS7 # B9600 SANE PARENB \  
CS7 ISTRIP IXANY TAB3 #login: #FAX
```

You must then edit your `/etc/inittab` file to reflect this change. Search for the lines with the string `/etc/getty` and 9600 in them. Of these lines, identify the line referring to the device you will use for the serial connection and replace 9600 with FAX. After making these changes, kill the process `getty` for this device. When the process restarts, the new values will take effect.



The default configuration for the fax gateway is as follows:

- The mailnode associated with the fax gateway is **FAX**.
- The route to the fax gateway is **FAX**.
- The gateway is enabled.

You can change the default configuration. The following commands and options can be used:

Command	Explanation
<code>omstat -s</code>	Shows the status of all HP OpenMail services, including which gateways are installed.
<code>omon -s FAX</code>	Enables the fax gateway.
<code>omoff -s FAX</code>	Disables the fax gateway.
<code>omshowfax -m</code>	Displays the current fax gateway mailnode, as set using <code>omconf fax</code> .
<code>omconf fax -m "new mailnode"</code>	Changes the mailnode used by HP OfficeFax to <i>new mailnode</i> .
<code>omshowrt -q "#FAX"</code>	Lists all routes to the fax gateway.
<code>omaddrtrt -m "mailnode" -q "#FAX"</code>	Routes <i>mailnode</i> through to the fax gateway.
<code>omdelrt -m "mailnode"</code>	Deletes a route (<i>mailnode</i>) from the HP OpenMail system.

For details of these commands, see the HP OpenMail man pages. You can also use the HP OpenMail administration interface (`omadmin`).

Preparing the Fax Server

This chapter tells you what you need and what must be done before you can install the HP OfficeFax software on the fax server.

You need one of the following personal computers running MS-DOS version 3.3 or 4.01:

- HP Vectra PC—Classic, CS, ES, RS, or QS.
- IBM PC/AT (8MHz or greater).

The personal computer should be used solely as a fax server and must have:

- A hard disk.
- A 1.2Mbyte flexible disk drive.
- 640Kbyte of RAM.
- CGA, EGA, VGA or another Microsoft Windows supported video display.
- A serial port and cable connecting it to the mail server.

Before installing the HP OfficeFax software on the fax server, you must first prepare the fax server, and install the GammaFax CP/T fax boards and software. The following points outline this procedure:

Preparing the fax server:

1. Remove any extended or expanded memory boards. HP OfficeFax does not use expanded or extended memory. Also remove any LAN (Local Area Network) boards.
2. Re-format the hard disk and install MS-DOS 3.3 or 4.01. This will ensure that you have no unnecessary applications on the fax server and the disk will be un-fragmented.

If you are using an HP Vectra, *do not* install PAM. If PAM has already been installed, you can ensure that it is not run when you reboot the machine by using the following command:

```
PAMINSTL C: /N
```

3. If you want, install your favorite text editor. (You will need to make small changes to a few ASCII text files later in the installation process.) Alternatively, you can use the DOS text editor EDLIN.

Installing the GammaFax boards and software

1. Install the GammaFax CP/T board. Refer to the GammaFax documentation for installation instructions. (More than one board may be installed. How many boards you install depends on the number of available expansion slots on the fax server and the volume of faxes you expect to send and receive.)
2. Make a note of the base I/O address of the GammaFax CP/T boards. You will need to know this for the HP OfficeFax installation. (The HP OfficeFax installation program will prompt you with the GammaFax default I/O address used when only one board is installed.)
3. Install the GammaFax software in the directory `C:\FAX`. Follow the installation instructions given in the GammaFax documentation.
4. Check that the GammaFax installation has been successful by using GammaFax to send and receive a fax. Refer to the GammaFax documentation for details.
5. After checking that the GammaFax installation was successful, remove the following lines from the `AUTOEXEC.BAT` file if they are present:

```
CD C:\FAX
GFQRESET + options . . .
GFDCCP + options . . .
```

Note—You should not use the GammaFax user interface to send faxes after having installed HP OfficeFax as this would corrupt the HP OfficeFax internal database.

6. Reboot the fax server.
7. You are now ready to install the HP OfficeFax software. See Chapter 4.

For plain paper printing of incoming faxes, the fax server can be directly connected with a parallel cable to one or two of the following printers:

- HP LaserJet
- HP DeskJet

The fax server can only print faxes to the parallel ports LPT1 and LPT2. The printer must have at least 1Mbyte of internal memory to print a full page fax at 300 dots per inch (dpi).





Installing the Software

This chapter tells you how to install the HP OfficeFAX software.

Before you install the HP OfficeFAX software, check:

- You are using MS-DOS 3.3 or 4.01.
- The GammaFAX software is installed in the C:\FAX directory and has been tested.
- There is no expanded memory, disk caching, or memory resident programs running.
- Only essential drivers are installed—see your CONFIG.SYS file.
- The fax server is connected to the mail server using a serial cable connection. (You can check the connection by using a terminal (or personal computer running a terminal emulation program) to log on to the mail server over the serial connection.)

The installation program **SETUP** installs a single application version of Microsoft Windows with the HP OfficeFAX software on the fax server. After this, you must run the program **CHECKFAX**. This program logs onto the mail server and checks that the system is running. If the program is successful, it will then encrypt the files used to log on to the mail server and update your **AUTOEXEC.BAT** file.

If you connect to an HP DeskManager mail server, you must also run the program **UPLOAD** before running **CHECKFAX**. This copies HP OfficeFAX program files to the mail server.

Note



You will not be able to run the HP OfficeFAX application until **CHECKFAX** has been successfully run.

The following notes will help you when running the installation program:

- Know what type of personal computer, display, keyboard, and pointing device (if any), you have.
- Do not use extended memory.
- Do not install a printer or plotter. You can use a printer with the fax server but this is configured later from within HP OfficeFax.
- Do not run MEMSET. HP OfficeFax does not make use of extended or expanded memory.
- *With an HP DeskManager mail server*—Know the name you have given the fax gateway on the mail server, its associated password, and location (mailnode). Also the user and account passwords for MANAGER.SYS,PUB and MGR.HPOFFICE,PUB.
- *With an HP OpenMail mail server*—Know the password for the user FAX. Also the login and password strings used during login, and the shell prompt.
- Know how many contiguous disks the fax server can use. For example, your fixed disk may be partitioned into C and D drives. The fax server could therefore use two contiguous disks.
- Know the CSID (Customer Subscriber Identification) number you want to use. This is usually the telephone number (with country code) of the fax server. It is included in outgoing faxes as a return address. Alternatively, you could give the telephone number of a local fax machine that is to be used for incoming faxes.
- Know how many GammaFax CP/T boards are installed in the fax server.
- Know the base I/O address for each GammaFax board and whether it should be used for only incoming or outgoing faxes or for both. (The HP OfficeFax installation program will prompt you with the GammaFax default I/O address used when only one board is installed.)
- Know whether your telephone system supports tone or pulse dialing.

Installation

To install the HP OfficeFax software on the fax server:

1. Insert the disk labelled *Setup/Windows Build Disk* into the flexible disk drive of the fax server.
2. At the DOS prompt, log on to your flexible disk drive. For example, type **A:** and press **Enter** to log on to the A drive.
3. Type **SETUP** and press **Enter**.

During the installation process, you will be prompted for information—see the notes at the beginning of this chapter.

4. The installation program will copy files to the fax server. When prompted, insert the next disk in the drive and press **Enter**.

When the **SETUP** program has finished, you are returned to the DOS prompt.

5. *If the fax gateway is on an HP OpenMail mail server, go to list item 6.*

From the DOS prompt, type **UPLOAD** and press **Enter**.

This program will log on to the mail server as **MANAGER.SYS,PUB** and copy HP OfficeFax program files to the mail server. If the program is unable to establish a connection with the mail server, see the section “Connecting to the Mail Server”.

6. From the DOS prompt, type **CHECKFAX** and press **Enter**.

This program logs on to the mail server and checks the system is running. If successful, it will encrypt the logon command file and update the **AUTOEXEC.BAT** file. If the program is unable to establish a connection, see the section “Connecting to the Mail Server”.

Note—If the **CHECKFAX** program does not complete successfully, you will be unable to start HP OfficeFax.

7. You are now ready to start the fax server. To do so, reboot the computer. The fax server will automatically start up.
8. Now configure the fax server. See Chapter 5.

Connecting to the Mail Server

Read this section if either the **CHECKFAX** or **UPLOAD** programs have been unsuccessful in logging you onto the mail server.

The default command files supplied with HP OfficeFAX assume that you have a direct hardwired serial connection between the fax server and mail server.

The command files use Basic Serial Connection commands. See your *Using Basic Serial Connection Files* manual for information about the commands used in these files.

The following command files are used. They are in the directory in which you installed HP OfficeFAX.

- LOGON.CMD** This file is used to log on to the mail server.
- If you are using an HP DeskManager mail server, the command file must log you on as **MGR.HPOFFICE,PUB**.
 - If you are using an HP OpenMail mail server, the command file must log you on as the user **FAX**.
- LOGOFF.CMD** This file is used to log off from the mail server.
- ABORT.CMD** This file is used if HP OfficeFAX has to unexpectedly shutdown.
- UPLOAD.CMD** This file is only used if you are connecting to an HP DeskManager mail server. The file is used by the installation program **UPLOAD** to log on as **MANAGER.SYS,PUB** and transfer HP OfficeFAX program files to the **PUB.SYS** account on the mail server. After **UPLOAD** has successfully completed, the file is deleted.

Edit these files if the serial connection to the mail server is anything other than a direct hardwired connection, or your logon procedure is different from that expected by the logon command file. Refer to your *Using Basic Serial Connection Files* manual.

When you have made the necessary changes to the command files, repeat the installation procedure given in this chapter starting from list item 5.

Note

When **CHECKFAX** is run successfully, it will encrypt your **LOGON.COMD** file. It will then be unreadable. This is done to protect any passwords used in the file. Therefore, if you develop your own **LOGON.COMD** command file, always keep a copy of the file on a flexible disk for future reference.

Also to protect your passwords, remember to delete any **.BAK** files that you may create when you use a text editor like **EDLIN** to edit the command files.





Configuration

This chapter briefly describes what needs to be configured in HP OfficeFax and then explains how you can create a customized title page for your faxes.

Configuring the Fax Server

1. Turn on the fax server. After a few moments the Server Mode screen is displayed.
2. Press the **(Space Bar)** to change to Administration Mode. After one or two minutes the Administration Mode screen is displayed.
3. Select the Settings menu and choose the command for the setting you want to configure. Details of each command will be found in the *HP OfficeFax Administration* manual. You need to configure the following:
 - How incoming faxes are processed.
 - How outgoing faxes are processed.
 - Any printers you may have connected to the fax server.
 - The size of the Sent and Received Logs.
4. After configuring the fax server, return to Server Mode and test HP OfficeFax by using your electronic mail system to send a fax.

Creating a Fax Title Page

The installation program automatically installs a default title page that is attached to all outgoing faxes. This section tells you how to create a customized title page.

When a fax is sent, a title page is always added by the fax server. The title page is a combination of text and graphics. It can show the sender's and recipient's names, when it was sent, how many pages are in the fax, and so on. A default title page is supplied when you install HP OfficeFax. However, you can supply your own title page.

The title page is made up of two components, a graphic component and a text component. The text component overlays the graphic component. The text component must always be present. You can customize either component.

To create a fax title page:

1. Create the graphic component. See "The Graphic Component".
2. Create the text component. See "The Text Component".
3. Copy the graphic and text components to a flexible disk and insert the disk in the flexible disk drive of the fax server.
4. Put the fax server into Administration mode.
5. Choose the Title Page command from the Settings menu.
6. If you are adding a new graphic component, select Use TIFF file and type the full DOS name of the TIFF file.

If you are adding a new text component, select Use Text file and type the full DOS name of the text file.

If you are only changing one of the components, leave the other component as No Change.

7. Choose OK. The title page will be created. This may take a few minutes.
8. Choose Return to Server Mode from the Control menu.

The new title page will be added to the next message transferred from the mail server.

The Graphic Component

The graphic component of the title page can be any TIFF file (Tagged Image File Format). Many graphics applications will produce TIFF files, including HP Graphics Gallery.

When creating the TIFF file, follow these guidelines:

- The image should be black and white.
- It should be saved at 300 dots per inch (dpi).
- It should be saved at a size no larger than 7.5 inches wide and 11 inches high.

Note



If after adding your own graphic component to the title page, you want to re-use the graphic component supplied with HP OfficeFax, close HP OfficeFax and from DOS copy the file RJFORM from the *Setup/Windows Build Disk* to the \CONVERT directory on the fax server.

The Text Component

The text component is an ASCII file with substitution strings. The text in this file overlays the graphic component. The positioning of the text on the title page is as it is displayed in the ASCII file.

The following illustration shows an example text component for the title page:

```
FAX No :           @PHONENUMBER

For the attention of : @TOFORENAME1 @TOFORENAME2 @TOSURNAME

                @SUBJECT

From :            @SENDERFORENAME1 @SENDERFORENAME2 @SENDERSURNAME

Date & Time :    @DATEANDTIME    Pages to Follow : @PAGESTOFOLLOW
```

Example Text Component

The substitution strings are optional—you can have a text component that uses only fixed text.

The substitution strings must be in upper-case. They can be placed in any order.

The following substitution strings can be used:

String	Meaning
@TOFORENAME1	The name of the recipient. This is taken from the TO part of the distribution list of the message.
@TOFORENAME2	
@TOSURNAME	
@SENDERFORENAME1	The name of the person sending the fax. This is taken from the Sender part of the message. Note—This is the name of the person creating the message. It is not necessarily the same as the name that appears in the FROM part of the distribution list of the message.
@SENDERFORENAME2	
@SENDERSURNAME	
@PHONENUMBER	The telephone number of the recipient's fax machine. This is taken from the foreign address of the message.
@SUBJECT	The subject of the fax. This is taken from the subject of the message.
@PAGESTOFOLLOW	The number of pages in the fax, excluding the title page. This is calculated by the fax server.
@DATEANDTIME	The date and time the message was converted by the fax server to fax format. This is taken from the fax server's system date and time.

Note

If after adding your own text component to the title page, you want to re-use the text component supplied with HP OfficeFax, specify the file **TXFORM** on the *Setup/Windows Build Disk* in the Title Page dialog box.





A

Informing Your Users

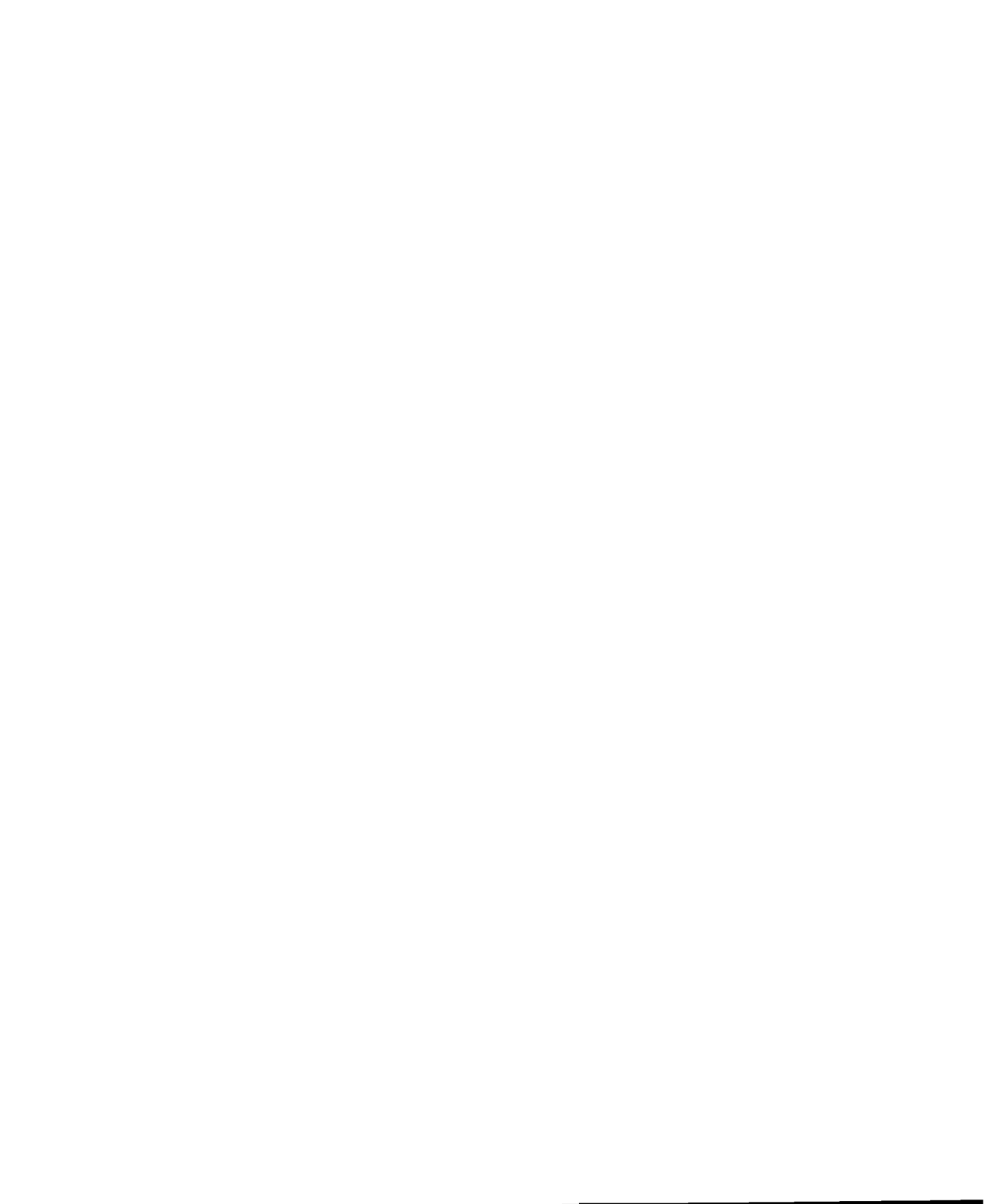
After you have set up HP OfficeFax, you should tell your users of the new service available to them.

Distribute the *HP OfficeFax* user cards to your users. Further packs of 30 cards can be ordered from Hewlett-Packard (Part Number 5959-9672).

In addition there is a text file called **FAXINFO.TXT** on the *HP OfficeFax Setup/Windows Build Disk*. The file reproduces the text of the *HP OfficeFax* user card. You can edit this file and use the mail system to mail it to all your users.

The card assumes that the location of the fax gateway is **FAX**. If you have used another name when setting up the gateway, edit the **FAXINFO.TXT** file accordingly.

You may also want to list all the specific file types that a user can send in a fax. HP OfficeFax will accept HP Graphics Gallery and TIFF graphics files, and any other file type that your mail system can convert to text.





HP Part No. 5959-9669
Printed in USA June 1990

E0690