

CASTELLE®

White Paper

Email Integration for Microsoft Outlook

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Executive Summary

Castelle's Email Gateways provide a variety of fax and email integration options for both the FaxPress and FaxPress Premier product lines. Serving as a link between the Castelle fax server and your network's mail server, the Gateways allow fax messages to be sent and received as easily as email, right from the user's mail client. Castelle's Email Gateways provide email integration solutions for most email environments, including Microsoft Exchange and Outlook, Lotus Notes and Novell GroupWise, as well as most SMTP-compliant mail systems. With the exception of the FaxPress Small Business Edition (SBE), Castelle's email integration solutions are standard, no-charge features for the FaxPress and FaxPress Premier product lines.

Your organization's email environment will determine the email integration option you decide to implement. The client-based **Outlook Direct**, installed on the user workstation, works independently of your network's mail server. For this reason, Outlook Direct is the ideal email integration solution in Microsoft Outlook environments operating without an Exchange server. Although no Exchange server is required, Outlook Direct does support Exchange 5.5 or 2000/2003, and is a good solution for Exchange environments where a client-based rather than server-based solution is preferred. Since Outlook Direct runs as a Microsoft Messaging Transport Service on the user workstations, and no connector is installed on the mail server, Outlook Direct leaves the mail server free for processes unrelated to faxing.

With Outlook Direct, familiar email commands are used to create, address, and send faxes, making fax messaging very similar to sending and receiving email. Attachments are rendered into fax file format for most applications, allowing attached files to be sent to fax and email recipients simultaneously. Faxes can be easily addressed using the existing Business Fax entries in the user's Contacts list. Incoming faxes can be received as attached TIF, DCX, or PDF files.

Outlook Direct is not suitable for a remote, dial-up or Virtual Private Network connection. For remote, dial-up or Virtual Private Network connections, either Castelle's Exchange Connector/Email Gateway or Castelle's Generic Gateway for SMTP option should be considered. And, although Outlook Direct does support Microsoft Outlook and Exchange, Outlook Direct does not support Microsoft Outlook Express.

For a server-based email integration solution for Microsoft Exchange, see the Email Integration for Microsoft Exchange White Paper. Or, if you'd rather not have any fax-related services running on your Exchange server, but would still prefer a server-based solution rather than the client-based Outlook Direct, see the Email Integration for SMTP Mail Systems White Paper.

Who Should Read This Document?

Network Administrators, IT Managers, Systems Integrators and consultants who will be implementing FaxPress or FaxPress Premier in a Microsoft Outlook environment.

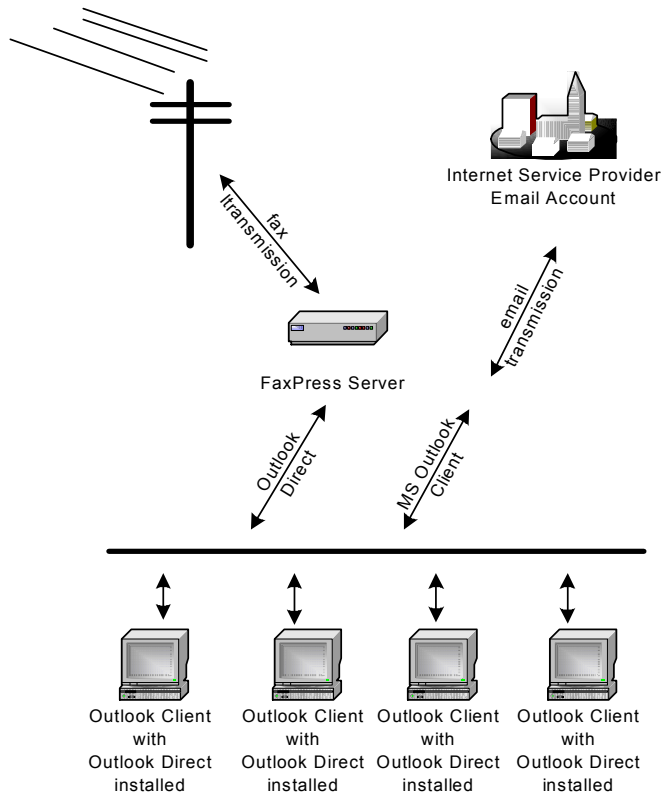
Outlook Direct: Integrating Microsoft Outlook with FaxPress and FaxPress Premier

Castelle's client-side FaxPress Outlook Direct service software, designed to operate in network environments running Microsoft Outlook, provides a convenient way for Outlook users to send and receive faxes using the FaxPress or FaxPress Premier. Client rather than server-based, Outlook Direct is able to operate independently of an Exchange server, making it ideal for smaller networks running Microsoft's most basic Exchange or Outlook email system.

For both the FaxPress and FaxPress Premier, the Outlook Direct service software is installed from the product CD onto the user workstations, and plugs in as a fax transport and a fax extension for Microsoft Outlook. The Castelle FaxPress Transport, a service added to the user's email profile, creates a seamless connection between Outlook and the FaxPress or FaxPress Premier server. Outlook Direct also extends the Outlook user interface by adding a FaxPress menu. The FaxPress menu allows the user to directly view and manipulate the incoming or outgoing fax queue and configure the properties of the fax transport.

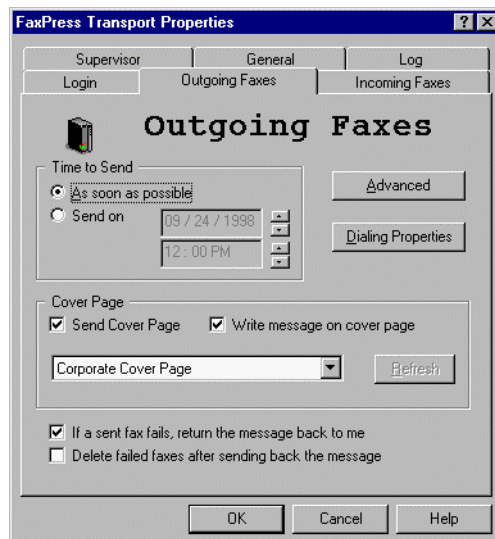
How It Works

The Castelle FaxPress Transport, a service added to the user's email profile, connects Outlook to the FaxPress or FaxPress Premier server. The FaxPress Transport delivers messages to the fax server for faxing, enables viewing of inbound and outbound faxes, provides real time fax status, allows the user to set faxing parameters and, if your phone system supports automatic routing, will also notify users of personal incoming faxes.



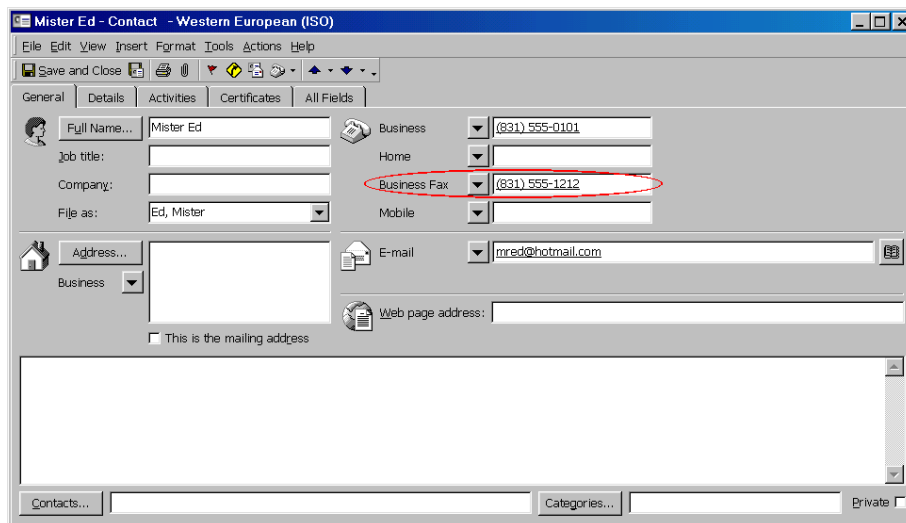
Administering Outlook Direct

Outlook Direct is administered on the client machine through the FaxPress Transport Properties added to the user's Outlook client profile. The FaxPress Transport Properties are used to customize incoming and outgoing transmission parameters, as well as configure the Outlook Direct settings according to your users' individual requirements.



Sending Faxes

Using Outlook Direct to send a fax message requires that you address your email to the recipient's fax number, rather than the email address. Fax messages can be addressed either by using the existing Business Fax entries from the Outlook Contacts list, or manually by entering the fax recipient's fax number according to the Outlook Direct fax addressing format.



Users can attach multiple files to a single fax message, or send one fax message to multiple recipients. Attachments are rendered into fax documents, and can be sent to both fax and email recipients simultaneously. Documents may also be sent as fax messages directly from within most third-party applications, using the **File>Send To>Castelle FaxPress** option. Outlook Direct's Fax Address template and real time fax status viewing tools further simplify your fax messaging.

Receiving Faxes

The FaxPress Outlook Direct transport periodically polls the FaxPress queues for incoming faxes, and can notify the user of personal faxes received on the FaxPress. If your telephone system employs some kind of automatic inbound routing that provides you with a personal fax number, the transport will send you an e-mail notice when a new fax is found in the user's mailbox. The fax can be converted to your choice of TIF, DCX or PDF format and attached to the email notice, or viewed from Faxmain. Your FaxPress transport's Incoming Faxes settings allow you to configure the email notices to be received with or without the fax attached, to specify the number of notices the transport can send in a specified amount of time, and also allow you to forward or simply print incoming faxes. If your network does not employ some kind of automatic or assigned line routing that provides you with a personal fax number, all incoming faxes will be stored in the FaxPress' Unaddressed mailbox. The administrator then assigns a router, operator, or supervisor-privileged user to route the Unaddressed faxes to the appropriate client mailbox.

Server-side vs. Client-side Email Integration Solutions

For small office environments, the client based Outlook Direct offers ideal fax and email integration. Able to operate independently of an Exchange server, Outlook Direct requires only simple workstation installations of the FaxPress client software in order to use the FaxPress or FaxPress Premier server.

For enterprises running an Exchange server with a large number of users, Castelle's server-based email integration solutions for Exchange and Outlook are ideal. The Exchange Connector/Email Gateway and the Email Gateway for Generic SMTP require deployment on the server side only, and consequently are ideal for large enterprises where client installations on individual user workstations are inconvenient.

For remote, dial-up or Virtual Private Network connections, either Castelle's Exchange Connector/Email Gateway or Castelle's Generic Gateway for SMTP option should be considered. Outlook Direct is not suitable for a remote, dial-up or Virtual Private Network connection. For fax/email integration via a remote, dial-up or Virtual Private Network connection, or for larger offices with an Exchange server and a large number of users, the Exchange Connector/Email Gateway or the Email Gateway for Generic SMTP are the more suitable options.

Pre-sales Support and Additional Information

For more help determining which email integration option will best serve your purposes, Castle sales staff is available to answer any questions you may have. For information on the FaxPress Exchange Connector/Email Gateway, please refer to the Email Integration for Microsoft Exchange White Paper. For more information on the Email Gateway for Generic SMTP email integration option, please refer to the Email Integration for SMTP Mail Systems White Paper.

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