ADVANTAGE
TECHNOLOGIES

opentext™

OpenText RightFax 20.2
Managed Services

Administrator Guide

Edition

OpenText RightFax 20.2 Managed Services

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Contents

Chapter 1: Introduction

As an administrator of a RightFax implementation managed by OpenText Professional Services, you can use Web-based RightFax Web Admin to define and manage items such as user accounts, cover pages, and billing codes, monitor statistics, run reports, and define settings for your multifunction printers (MFPs).

For mailbox tasks, you use the Web-based mailbox application FaxUtil Web. Specially trained administrators may need to use the Windows-based mailbox application FaxUtil for select tasks.

With the optional RightFax Analytics module you can monitor the usage of the RightFax server.

Chapter 2: Managing fax servers with RightFax Web Admin

Web Admin includes most of the functionality of Enterprise Fax Manager (EFM).

Use Web Admin to administer a RightFax server, stop and restart its services, define administrative components, monitor statistics, and manage MFPs.

For information about administering multiple servers, configuring RightFax services, and using EFM, refer to the *RightFax Administrator Guide.*

Starting Web Admin

To log on to Web Admin

1. Open http://<*servername*>/RightFax/Admin, where servername is either the name of the RightFax server or its IP address. You can also open http://<*servername*>/RightFax, and then click **Web Admin**.

2. In the **User ID** box, enter an administrator user ID. If required, enter the **Password**, and then click **Sign In**. When it is first installed, the default password for the Administrator account is **password**. Web Admin opens, the list of RightFax services appears in the right pane.

To enable dark mode

- On the <*username*> menu, select the **Dark mode** check box.

To log off

- On the <*username*> menu, click **Sign Out**.

The system will log you off after 15 minutes of inactivity.

Creating a list of RightFax servers

In Web Admin you can create a list of servers that you administer. From a server in the list, you can open Web Admin. This list is saved in cookies for each user.

To add a server

1. Open http://<*servername*>/RightFax/Servers, where servername is either the name of the RightFax server or its IP address. You can also open http://<*servername*>/RightFax, and then click **Servers**.

2. If the server list is empty, the **Add RightFax Server** dialog box opens.

   If the list has entries, click **Add** to add another server.

3. In the **RightFax Server Address** box, enter the server name or the IP address, and then click **Ok**.

To sign in to Web Admin from the list of servers

1. In the list of servers, click the link to the server.

2. In the **User ID** box, enter an administrator user ID. If required, enter the **Password**, and then click **Sign In**. Web Admin opens, and the dashboard appears in the right pane

Viewing the dashboard

The dashboard provides an overview of the usage of the RightFax server.

To change which charts appear

1. In the left pane, click **Dashboard**.

2. Click **Configure**, and as needed select and clear the check boxes of the charts you want to show or hide.

About the dashboard charts

Channels

- The **Channels** panel shows the number of fax channels that are in the process of sending, the number of fax channels that are in the process of receiving, and the number of fax channels that are idle.

- Click the panel to open the list of fax channels and view the status of each one.

Work Requests

- The **Work Requests** panel shows the total number of database work requests from the WorkServer modules and email gateway modules that are being processed by the server.

- WorkServer and email gateway work requests are shown as a percentage of the total.

- Click the panel to open the list of server statistics and queues and view the status of each one.

Services

- The **Services** panel shows the condition of the fax server services.

- Click the panel to open the list of services.

CPU Usage

- The **CPU Usage** panel shows the percentage of CPU that is in use by the fax server.

Fax by Volume

- The **Fax by Volume** panel shows the total number of faxes that have been received by the fax server and the number of faxes received by the two RightFax users with the most faxes.

Queues

- The **Queues** panel shows the current health of the work request queues. If one or more queues is out of the normal operating range, the chart shows the worst case.

Client Connections

- The **Client Connections** panel shows the current number of connections from the client applications to the RightFax server.

- Click the panel to open the list of client connections.

Fax Status

- The **Fax Status** panel shows the total number of faxes that are being processed for sending and the number of faxes in each sending process.

- Click the panel to open the list of server statistics and queues and view the status of each one.

Viewing fax channel information

To view fax channel information for the server

- In the left pane, click **Channels**. The right pane shows the following information for each fax channel that is available on the server:

Channel

Channel status, channel number, (channel capability), DocTransport.

Channel status:

⬆	Sending
⬇	Receiving
◯	Idle or waiting
⚠	Temporarily not available
⛔	Offline

Channel capability:

(N)	Reserved
(S)	Send (Dial)
(R)	Receive (Answer)
(B)	Both
(Vs) (Vr) or (Vb)	VM-Notify send, receive, or both
(Ss) (Sr) or (Sb)	Dial w/Ring Detect send, receive, or both

Operation

The current operational status of the channel.

Routing Code

The routing code for incoming faxes.

Phone Number

User ID

The destination user ID for incoming faxes.

State

Remote ID

Rate

Compression

About RightFax services

The RightFax services are configured and started during installation. If a service stops without user intervention, it is automatically restarted after 60 seconds.

Remote services appear in the list with (*servername*) appended to the service name. Monitoring services on remote servers requires network administrative access to the server as well as administrative access. See the *RightFax Administrator Guide*.

To open the list

- Click **Services**. The list of services appears with the status for each: 🟢 Running ⚠ Disabled ⛔ Stopped ⊖ Not configured or disconnected ⓘ Interactive

Monitoring server statistics and queues

Statistics and queues help you monitor your RightFax server. You can customize when the warning or alert icons appear for a queue on a server in Enterprise Fax Manager. See the *RightFax Administrator Guide*.

To view RightFax server statistics and queues

- Click **Statistics**. The available queues and statistics appear in the list, The following icons may appear:

  ⓘ Value is provided for informational purposes. No warning or alert threshold values defined.

  ◯ Stable amount of work in the queue. No warning or alert threshold values defined.

  ● Work is below the threshold values defined for this queue.

  ⚠ Work exceeds the threshold value defined for the warning icon and below that for the alert icon, if defined.

  ❗ Work exceeds the threshold value defined for the alert icon.

  ⊖ Queue could not be queried or does not apply to this server, or value is unavailable.

Fax Server

Statistic or Queue	Description
Total server events	Total number of events currently scheduled on a Server module.
Documents in queue on FaxServ(s)	Total number of document-related events currently scheduled on a Server module.
Total documents	All documents in the system.
Deleted documents	All documents flagged in the database as deleted. Associated value fluctuates based on the days to keep deleted fax records setting of each user group.

Transmission check events	Number of "Scheduled to be sent" and "Sending" documents that are pending Server module action.
System messages in the database	Messages from a Database module to a Server module that have deferred fax processing.
Quick kicks from Database module to Server module	Messages kicked by a Database module and passed to a Server module.
Gateway route requests	Number of requests from a Server module to gateways to pick up documents.
Fax Server Event Queue Usage	The percentage of the fax server's internal Event Queue currently in use.
All Faxes Scheduled	Number of documents on DocTransport scheduled to be sent.
All Transmission Statuses	Number of documents sent by DocTransport, but not yet processed by a Server module.
Deleted faxes queue depth	Number of items in the deleted faxes queue.
Notification queue depth	Number of items in the notifications queue.
Fax Server Events Processed on *servername*	The number of server events processed by the server. This statistic appears for each server in a collective.

Conversion

Statistic	Description
Conversion events	Number of events in the queue that are preparing an outbound fax to be scheduled for transmission.
PCL5 conversion requests	Number of requests to convert PCL documents.
Postscript conversion requests	Number of requests to convert Postscript documents.

General purpose conversion requests	Number of requests to convert documents from any format, including compound requests for multiple types of conversion.
Coversheet creation requests	Number of requests to create cover sheets.

DocTransport

Statistic	Description
Failsafe queue depth	Number of items in the failsafe queue.
Global queue depth	Number of items in the global queue.
RightFax queue depth	Number of items in the RightFax queue.
VM ntofiy queue depth	Number of items in the VM notify queue.
Remote send status queue depth	Number of items in the remote send status queue.
All-Time Send Attempts	The total number of faxes sent from this server since the **All-Time Counter Starting Date**.
All-Time Pages Sent	The total number of fax pages sent from this server since the **All-Time Counter Starting Date**.
All-Time Faxes Received	The total number of faxes received on this server since the **All-Time Counter Starting Date**.
All-Time Pages Received	The total number of fax pages received on this server since the **All-Time Counter Starting Date**.
All-Time Counter Starting Date	The starting date from which the "All-Time" statistics are calculated.

Fax Status

For each of the following fax statuses, the total number of faxes in each status:

- Initial Processing
- Waiting for Phone Expansion
- Waiting for Conversion
- In Conversion
- In Cover Conversion
- Waiting to be Sent
- Scheduled to be Sent
- Sending

Monitoring client connections

You can display a list of the current connections from the client applications to the RightFax server for all sessions where a user signed in but not out.

As an administrator you can remove client connections that appear to have ended. Removing a client connection from the list does not impact the user's connection even if it is still valid.

To open the list of client connections

- Click **Client Connections**. For each connection, the user ID, the date and time that user ID connected, and the application used to sign in appear in the right pane.

To refresh the view

- Click .

To remove client connections that appear to be invalid

- Select the check box next to one or more connections, and then click **Delete**. To delete all of the connections, click **Delete All**.

For each client connection that is deleted, the entry in the database will be marked as AdminLogOut.

Configuring the session timeout for FaxUtil Web

For security reasons, the system will sign out FaxUtil Web users after 15 minutes of inactivity. Administrators can change this setting.

To configure the session timeout

1. In the left pane, click **System**, and then in the right pane click **General**.

2. Click **Settings**, and the **Settings** dialog box opens. Enter the number of minutes of inactivity, and then click **OK**.

Chapter 3: Viewing RightFax Analytics

The optional RightFax Analytics module provides an overview of the usage of the RightFax server. It is helpful for assessing if fax channels are used at their capacity, for example. To troubleshoot the RightFax server, refer to the *RightFax Administrator Guide*.

Before you begin

- RightFax Analytics must be licensed and activated on the server, and the database must be installed and connected. See the *RightFax Administrator Guide*.

- Your user account permissions determine if you can view RightFax Analytics. See *Editing a user profile* on page 19.

To sign in

1. Open http://<*servername*>/RightFax/analytics, where servername is either the name of the RightFax server or its IP address.

2. In the **User ID** box, enter an administrator password. If required, enter the **Password**, and then click **Sign In**.

To return to the main Analytics page after viewing detailed data

- In the left pane, click **Analytics**

To sign out

- On the <*username*> menu, click **Sign Out**.

- The system will sign you out after 15 minutes of inactivity.

About the charts

The **Analytics** page provides an overview of server usage in charts.

Faxes

- The number of faxes that were successfully sent compared to the number of faxes that were successfully received during the specified time period.

- The total number of faxes that were sent and received appears in the center of the chart.

Pages

- The number of pages that were successfully sent compared to the number of pages that were successfully received during the specified time period.

- The total number of pages that were sent and received is shown in the center of the chart. This includes all pages, whether or not a fax was successfully sent.

Send Success Rate

- The number of faxes that were successfully sent compared to the number of faxes that were not successfully sent during the specified time period.

- The percentage of faxes that were successfully sent compared to faxes that were not successfully sent appears in the center of the chart.

Channel Usage

- The number of channels that were in use during peak usage of the specified time period. This includes all inbound and outbound calls regardless of the fax statuses during the specified time period.

- The number of channels at peak usage as a percentage of total channels appears the center of the chart.

- Click **Calculate** to view the chart.

Viewing and downloading Analytics data

To view the data behind a chart or graph

1. Click a chart to see the data in a graph on a timeline.

2. Click data in a graph to see the detailed data. Continue clicking for more details on successive pages.

   The list of records appears last and can be downloaded as a .csv file.

To print or download a chart

1. Find the chart you want to download.

2. Click ▽ to open the **Export or Print** menu, and do one of the following:

- To print the chart using the print function of the browser, click **Print chart**.

- To save the chart as a .png, .jpeg, .svg, or .pdf file, click the respective **Download...** option and specify the download location.

3. To return to the **Analytics** page, click **Analytics**.

To download a .csv file of the records

1. Click the chart and the data behind the chart until the list of records appears.

2. Click **Download**.

3. In the **Download** dialog box, click **Download** again.

4. Use the save function in the browser to save the file.

Customizing the charts

To specify a RightFax user group to analyze

1. On the **Analytics** page, click **Configure**.

2. Under **Group**, enter or search for the group ID. The charts will update with the data for the group.

To set channel usage thresholds

1. On the **Analytics** page, click **Configure**.

2. Under **Channel Usage Thresholds**, enter the number for the percentage at which the channel usage levels should change from green to yellow and from yellow to red.

3. Click **Ok**.

To change the time period for the data in the charts

1. On the **Analytics** page, click **Configure**.

2. Under **Configure Timeframes**, do one of the following:

   - To display data for the past 30 days including today, click **Month**.

   - To display data for the past 365 days including today, click **Year**.

3. Click **Ok**.

Chapter 4: Creating RightFax user accounts

Every RightFax user in your organization must be assigned a unique user ID and profile on the RightFax server. The RightFax server uses the user ID to assign ownership to sent faxes and route received faxes to their intended recipients. The user account settings determine each user's access to and usage of the system.

To open the list of users

- In Web Admin, in the left pane, click **Users**. The list of users appears in the right pane. The list always includes the DEFAULT user. For more information about this user, see *About the DEFAULT user* below.

  To select users in the list, select the check box next to their User ID.

The icons next to the user ID identify the type of user:

- **Administrator**. Can perform all administrative functions in RightFax.
- **Read-Only Administrator**. Can view the settings for administrative items, such as user accounts, billing codes, and cover sheets.

- **User Management Administrator**. Can create, edit, delete, enable, and disable user accounts.
- **User**. Can send and receive faxes.

- **Unprotected User**. Can send and receive faxes. Other users can view, manipulate, and delete faxes from this mailbox.
- **Disabled User**. Cannot send faxes or sign in to the mailbox. The mailbox continues to receive faxes
- **Synchronized Account**. Combined with the icon for a user or administrator, shows that the account was created from and is maintained by an external data source using the RightFax Sync module.

Any changes to users synchronized with another application, must be made in the other application, not in RightFax.

About the DEFAULT user

RightFax bases the creation of new users— including those created through importing, synchronization, or automatic enrollment — on the user profile of the DEFAULT user. It is good practice to customize the DEFAULT user profile with the attributes of the majority of your fax users.

> **Caution** Do not delete or rename the DEFAULT user ID. It is required for many functions and deleting or renaming it could lead to parts of RightFax not functioning as intended.

> **Note** If used, the profile settings for Active Directory synchronization override any user profile settings of the DEFAULT user. For more information, see the *RightFax Administrator Guide*.

Creating, deleting, copying, and editing users

To create a new user

1. Open the list of users.

2. Click **New**. The **New User** page opens.

3. In the **User ID** box enter a unique user ID for the new user. All other boxes are optional. For information about completing these options, see *Editing a user profile* on the next page.

   The new user has the same attributes as the DEFAULT user ID, except for **User ID**, **User Name**, **Password**, and **Distinguished Name**.

To edit the properties of an existing user

1. Select the user in the list.

2. Click **Edit**. The **Edit User** page opens. For more information, see *Editing a user profile* on the next page.

To delete a user account

1. Select the user or users in the list.

2. Click **Delete**, and confirm the deletion if there are faxes or phonebooks associated with a user.

Disabling a user account

At times you may need to disable a user's account. Disabling a user account means that:

- The user's outbound faxes will be blocked from sending.

- The user will not be able to send faxes from their fax mailbox (FaxUtil or FaxUtil Web), through the RightFax Fax control module (QuickFax, Send To, or from a native application), or from the RightFax Outlook Add-In.

- A user with administrative permissions will not be able to sign in to the administrator client (EFM or Web Admin).

- The user account will be excluded from Smart Fax distributions within groups they are part of.

  > **Caution** Smart Fax distribution may not work as intended after disabling users within a group. Verify that active users remain.

While disabling an account keeps the user from sending faxes and signing into their fax mailbox, the following does not change:

- The user's received faxes will continue to be placed into their mailbox, including faxes routed or forwarded to them using their RightFax user account.

- The user will continue to receive any faxes routed to their email address, fax notifications of certified delivery, and any other email notifications.

- Other users with delegate access to the user's account can still act on the disabled user account's behalf.

RightFax requires at least one enabled administrator account. Therefore, you cannot disable the last administrator account.

To disable a user account

- Select the user or users in the list, and then click **Disable**. The icon changes to the disabled icon.

To enable a disabled user account

- Select the user or users in the list, and then click **Enable**. The icon changes to the appropriate user or administrator icon.

Editing a user profile

In the Edit User window, as needed, click the heading of the section you want to edit.

Identification

User ID

Enter a unique identifier to be used throughout the RightFax system to identify the user. In most cases, this ID should be the same as the user's network login name. The ID can be up to 21 characters long.

Link to Domain Account

- Click to link this RightFax user to a Windows user account and use Windows authentication to access the user account. A RightFax password will not be used.

Username

Enter a descriptive name to identify the user.

Entering user names with diacritical or other characters requires the appropriate character sets and code pages be installed on the RightFax server. See the *RightFax Installation Guide*.

Password

If not using Windows Authentication, create a RightFax user password. To change a user's password, type the new password.

When it is first installed, the default password for the Administrator account is **password**.

If your organization requires strong passwords, enter a password that:

- Consists of 8 - 11 characters.

- Includes both upper- and lowercase characters.

- Includes at least one number or one of the following special character: ` - = [ ] \ ; ' , / ~ ! @ # $ % ^ & * _ + { } | : " < > ?

If you leave this box blank, the user will not be required to enter a password when accessing RightFax client applications.

Confirm password

If used, retype the RightFax password.

Distinguished name

Enter the Microsoft Exchange distinguished name used to confirm accurate RightFax and Exchange user synchronization.

Group ID

Select the name of a group. Every user must assigned to a RightFax group. For information on creating groups, see *Creating, deleting, copying, and editing groups of users* on page 36.

Voice mail subscriber ID

Enter the mailbox number to use when routing faxes to a telephony server. This box is also used to assign TeleConnect mailbox numbers to RightFax accounts (requires the TeleConnect module, purchased separately).

Email address

Enter the user's email address.

- The user will be able to send documents to email as well as fax addresses.

- If configured, notifications about the user's sent and received faxes will be sent to this address.

- When using email gateways, RightFax can determine the correct RightFax user as the sender .

SMS/Mobile Address

Enter the user's SMS phone number. If configured, SMS notifications about sent and received faxes can be sent to this number.

Permissions

- Under **User Permission Attributes**, select or clear the permission check boxes.

Setting	Description
Permissions	

Setting	Description
Can Change Cover Sheets	If selected, the user can change cover sheets and is not restricted to use the cover sheet specified under **Default Outbound Settings** (*Default Outbound Settings* on page 23).
Can Edit/Add Forms	If selected, the user can add new overlay forms to the RightFax system using the client applications.
Can Edit/Add Library Docs	If selected, the user can add new library documents to the RightFax system using the client applications.
Can OCR Faxes	If selected, the user can OCR faxes, either manually or automatically, as defined in FaxUtil. This attribute is not required for OCR routing. All OCR functionsRightFax OCR Converter module.
Can Run Reports	If selected, the user can run RightFax reports.
Can Send SMS Messages	If selected, the user can send documents to SMS addresses from within the RightFax client applications.
Can Use High Priority	If selected, the user can send faxes using "high" priority. If not selected, the user can use only "normal" and "low" priorities.
Can View Prior Versions of Fax Pages	If selected, the user can view previously saved versions of fax pages.
Can View Analytics	If selected, the user can view RightFax Analytics.
Restrictions	

Setting	Description
Disallow Billing Code Lookup	If selected, the user cannot view the list of valid billing codes. This requires the user to know at least one valid billing code. **Note** You must select both **Disallow Billing Code Lookup** and **Disallow Editing of Billing Codes** to ensure that users cannot modify their default billing code settings.
Disallow Changing of Notification Options	If selected, the user cannot change his or her notification options.
Disallow Creating and Editing of Phonebooks	If selected, the user cannot create or edit phonebook entries and phonebook groups, or configure MAPI, LDAP, and ODBC phonebooks.
Disallow Delegating to Groups	If selected, the user cannot add groups of users as delegates. This permission applies only if the Disallow Modification of Delegates permission is not selected.
Disallow Editing of Billing Codes	If selected, the user cannot change the default billing code settings for outgoing faxes. In addition, any billing codes specified in phonebook entries are ignored as are any <BILLINFO> embedded codes.
Disallow Fax Annotations	If selected, the user cannot add notes to faxes and cannot create stamps.
Disallow Fax Deleting	If selected, the user cannot delete faxes. This setting can be useful for persons doing manual fax routing.
Disallow Modification of Delegates	If selected, the user cannot modify their delegates. The current delegate settings are honored.
Disallow Outbound Email	If selected, when the user sends a fax addressed to an email address, the fax server fails the fax.

Setting	Description
Disallow Server Printing	If selected, the user cannot print to network printers configured on the fax server for automated network print functions.
View Only First Page of Received Faxes	If selected, the user can view or print only the first page of a received fax. This is useful when manual routing is employed. The restriction applies to the mailbox regardless of the permissions of the user viewing the mailbox. Faxes must be routed out of the restricted mailbox before subsequent pages can be viewed or printed.
Requirements	
Must Have Faxes Approved	If selected, every fax sent by the user must be approved by a full administrator, or a group or alternate group monitor.
Must Have Password	If selected, the user must have a password. This does not restrict the ability to change the password.
Must Select Recipients from Phonebook	If selected, the user can only enter recipients by selecting them from a phone book when sending a fax from a Windows-based client. Use this permission in conjunction with **Disallow Creating and Editing of Phonebooks** to ensure that the user cannot add entries to the phonebook.
Add Sent Faxes to External Processing Repository	If selected, the user's outbound faxes are archived by a WorkServer. To configure WorkServer archiving, see the *RightFax Administrator Guide*. **Note** This check box applies only to WorkServer archiving of outbound faxes. WorkServer archiving is disabled when the optional XML Generator or Vault module is configured.

Setting	Description
Assign Default Billing Codes to Received Faxes	If selected, the user's default billing code settings (see *Other* on page 32) are applied to all received faxes. This is most useful if RightFax is set up to require billing codes on received faxes. See *Customizing the use of billing codes* on page 55.
Stamp Pages of Received Faxes with Audit Stamp	If selected, printing of the RTI line is enabled and one line of text will be added to the bottom of each received fax page listing total pages, date and time received, fax server used, routing code used, CSID (caller subscriber identification) of sender, and transmission duration.
Exceptions	
Bypass Billing Code Verification	If selected, the user can send faxes without supplying correct billing codes. This does not exclude the user from having to supply other required fields to send faxes. This attribute is only effective if billing code verification is required system-wide.
Excluded from Group Fax Aging	If selected, the user's faxes are not subject to the automatic fax aging (image deletion) attributes of the group to which the user belongs.
Excluded from RightFax Archive	If the server is licensed for RightFax Archive, then all of the faxes for all RightFax users are subject to archiving. If selected, the user's faxes will not be archived with RightFax Archive.
Unprotected Mailbox	If selected, all other RightFax users can view, manipulate and delete documents in this user's mailbox. This does not affect the security of phonebook entries belonging to the user.

Granting administrative access

You can grant a user limited or full administrative access:

- A **Read-Only Administrator** can view the settings for administrative items in EFM and Web Admin, but cannot create, edit, or delete any items or settings.

- A **User Management Administrator** can create, edit, delete, disable and enable user accounts, and—like the read-only administrator—can view the settings for other administrative items in EFM and Web Admin, but cannot create, edit, or delete any of these items or settings. The ability to create and edit users does not include the ability to copy users between servers.

- An **Administrator** can perform all administrative functions in RightFax, including creating, editing, and deleting administrative items in EFM and Web Admin and performing administrative tasks on the mailboxes of other users.

> **Important** The administrative access permissions do not control the ability to access the RightFax Services in EFM. This is controlled by the user's Windows permissions. However, you can grant an administrative user access to RightFax Services in EFM and Web Admin.

In addition to the above administrative roles, you could define a Services Administrator where the user would have sufficient Windows permissions to access the RightFax Services and be granted Read-Only Administrator access to be able to run Enterprise Fax Manager.

To grant a user limited administrative access
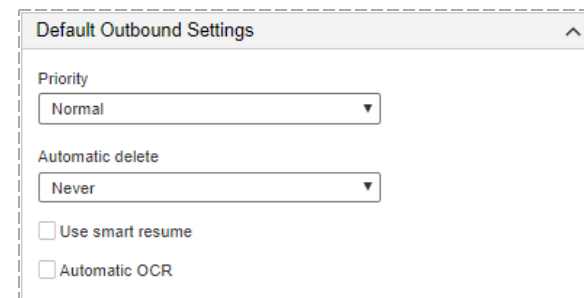
1. In the **Client Permissions and Attributes** list, select the check boxes for the appropriate user permissions.

2. Select the **Administrative Access** check box.

3. Click one of the limited administrator roles:

- For read-only access to EFM and Web Admin, click **Read-Only Administrator**.

- For user management access to EFM and Web Admin, click **User Management Administrator**.

To grant a user full administrative access

1. In the **User Permissions and Attributes** list, select the check boxes for the appropriate user permissions.

2. Select the **Administrative Access** check box.

3. Click **Administrator**.

4. Select the **Can Bypass Privacy Restrictions** check box if the administrator should have access to faxes in other users' mailboxes and be able to manage user delegates in EFM and Web Admin.

Default Outbound Settings

Priority

Select the default priority (**Normal**, **Low**, or **High**) for the user's faxes. Users can set a different priority when creating a fax.

Automatic delete

> **Caution** Auto-deleting sent faxes prevents users from reviewing or forwarding their sent faxes, and notifications of sent faxes will not be sent.

Specify whether to automatically delete faxes:

- **Never**. Sent faxes are never automatically deleted. The user can review and forward sent faxes and notifications of sent faxes are sent. Select this option for most users.

- **Only If Successfully Sent**. Select this option if the account will be used to send large broadcast faxes.

- **All Faxes (successful & unsuccessful)**. Select this option to prevent large numbers of faxes from accumulating in the user's fax inbox and to save disk space. Fax image files, not original documents created in other applications, are deleted.

  With this option enabled, sent faxes will not be automatically deleted if either of the following options is configured:

  - If the permission **Add Sent Faxes to External Processing Repository** is enabled for the user.

  - If autoprinting of sent faxes is enabled for the user in FaxUtil.
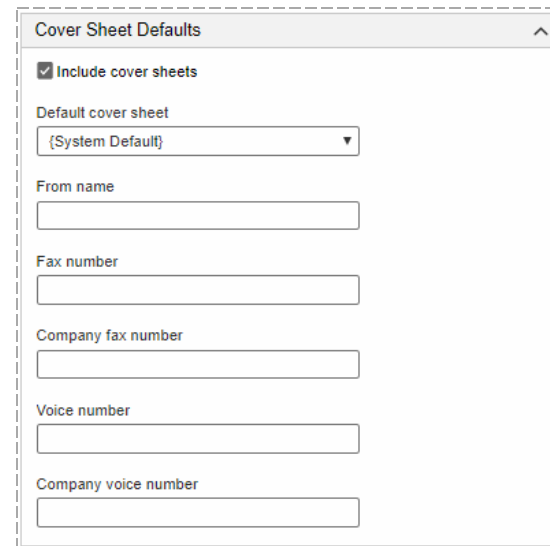
Use smart resume

Select this check box to have the fax server resend only the portion of a fax that failed to send. Users can also set this option when they send a fax.

Automatic OCR

Select this check box to convert the text of the user's outbound faxes to text files with optical character recognition (requires the OCR Converter Module).

Cover Sheets Defaults

- For a user that should be able to send cover sheets with faxes, select the **Include cover sheets** check box and specify the cover sheet defaults.

Default cover sheet

Select the default fax cover sheet file to use for this user. The list shows the fax cover sheet files added in EFM or Web Admin. Select **System Default** to use the fax cover sheet specified for the user's group or, if no group cover sheet is assigned, the cover sheet set as the system default in Cover Sheets.

Default sender information

In the remaining boxes, enter the default sender information that will appear on fax cover sheets for this user, including the name, fax number, company fax and voice numbers. A fax number assigned from the Fax Numbers list for routing may appear as the default fax number.

Default Inbound Settings

The Automatic OCR (optical character recognition) option requires the RightFax OCR Converter module.

Default Inbound Settings

☐ Automatic forwarding

Forwarding type

Forward to fax machine ▾

Fax number

☐ Automatic OCR

Extension

TXT

Format

ASCII ▾

Layout

Left Justified ▾

To forward the user's faxes as soon as the faxes are received

1. Select the **Automatic forwarding** check box.

2. In the **Forwarding type** list, select whether to forward to a fax machine or network users:

    - To forward to a fax machine, select **Forward to fax machine** and in the **Fax number** box, enter the fax number.

    - To forward to one or more RightFax user IDs, select **Forward to RightFax user(s)** and in the **User IDs** box, enter the user IDs. Separate multiple user IDs by comma.

To convert all received faxes to text using OCR
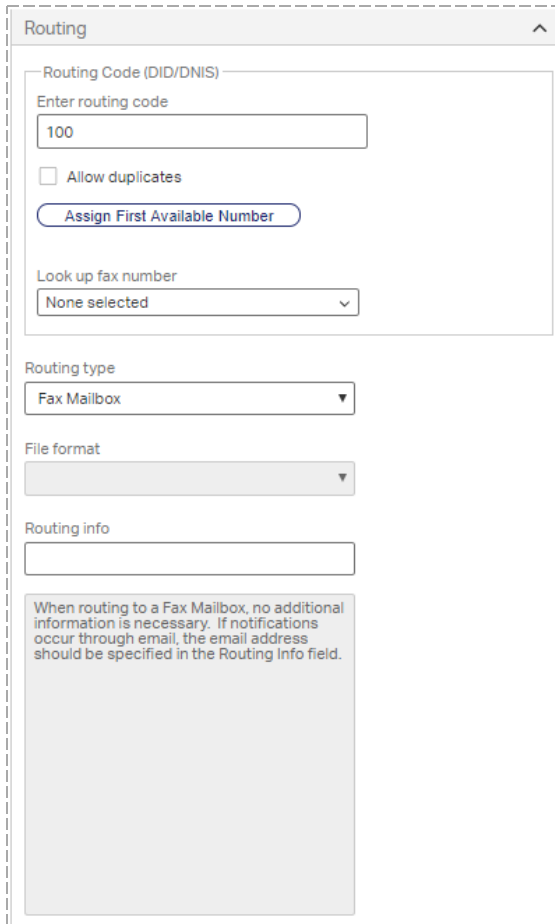
1. Select the **Automatic OCR** check box.

2. In the **Extension** box, enter a three-letter file extension for the

output file.

3. In the **Format** list, click the text format used to interpret your fax pages:

    - **ASCII** produces a plain text file.

    - **RTF** (rich text format) preserves fonts and formatting but is only available for Windows clients.

4. In the **Layout** box, **Left Justified** means that left justified text starts from the left margin of the fax.

Routing

When a fax is received by the server, RightFax attempts to match any included routing information to a RightFax user. If a match is found, the fax is routed to the user's mailbox. For more information, see the *RightFax Administrator Guide*.

Routing code (DID/DNIS)

Enter a unique number to which to route received faxes for this user. Enter the DTMF extension, DID phone number, or channel number.

If your organization maintains fax numbers in RightFax, you may be able to do one of the following:

- To assign the next fax number available, click **Assign First Available Number**. A message informs you if all numbers have been assigned. To view the list of fax numbers and their assignees, click **Look Up Fax Number**.

- To select a fax number from the list of fax numbers available to the user's group, click **Look up fax number**, click a number not associated with a user ID, and then click **OK**.

- To disassociate the current number from this user, delete the number from the **Routing Code** box.

If you enter a number from the Fax Numbers list, the number will be copied to the **Fax number** box—if currently blank—in the **Cover Sheets Defaults** section upon saving, and the Fax Numbers list will be updated to show this user's ID.

> **Note** Each routing code is best assigned to only one user or group. If you assign a routing code to multiple users or groups, only the initial assignee will receive the faxes for the code and will appear as the assignee in the fax number list.

Routing type

Select where incoming faxes will be routed after they arrive in the user's fax mailbox.

File format

Select the file format in which faxes are delivered when routed. The available formats vary depending on the routing type you choose.

Format	Description
DCX	DCX combines multiple PCX pages into a single file. It solves the multiple attachment problem of PCX files but maintains the large file size (average of 135 Kb per page).
GIF	The graphics interchange format is available for routing in Microsoft Exchange.

PCX	PCX produces a single page per file with an average fax page size of 135 Kb. It is useful for routing received faxes to DOS and Macintosh users because DOS and Macintosh have built-in capabilities to view PCX-formatted fax pages.
	This format is not recommended for Windows client applications, because PCX is a large format and users have to sift through multiple attachments when viewing multiple page faxes.
PDF	The portable document format.
PDF (searchable)	The searchable portable document format includes a searchable text component. It requires additional licensing. When licensed, all received PDFs are searchable regardless of which PDF format is selected.
TIFF-G3/ TIFF-G4	TIFF-G3 is a structured file type that is best for monochromatic images like fax pages (average of 35 Kb per page). Most email systems can read TIFF-G3 files, and you can associate the RightFax Fax Viewer with TIFF-G3 files to view these faxes in any application.
	TIFF-G4 is a more compressed file format.
TIFF (Enhanced)	TIFF (Enhanced) can help improve the readability of text by straightening skewed pages and removing background noise. It does not improve the appearance of graphics.
WebDelivery	Instead of the fax, only the URL for Web Delivery is sent for inbound faxes routed via SMTP or Microsoft Exchange.

Routing info

Specify how to route the fax to the correct destination for the specified routing type. If you route faxes to an email mailbox, you must enter the email address here. For information on the required routing info for each routing type see the *RightFax Administrator Guide*.

Routing Filename Format

If faxes will be routed to a network directory, you have the option to define the format of the file name. For information on the options for naming files, see the *RightFax Administrator Guide*.

Received fax routing form

If you selected Exchange Mailbox as the routing type, select the Outlook form to which you want to route incoming faxes. Select **System Default** to use the form set in the Email Gateway configuration program. For more information, see the *RightFax Connector for Microsoft Exchange Administrator Guide*.

Include Web Delivery URL

Select this check box to include the URL for Web Delivery together with the fax image for inbound routed faxes. If the user's routing format is set to WebDelivery, only the URL is sent.

Delete after routing

Select this check box to delete a received fax from the user's mailbox after the fax has been successfully routed to the application specified in the **Routing Type** list.

Automatic Printing

You can enable automatic printing if you have defined at least one RightFax printer. See *Creating, deleting, and copying a printer* on page 52.

To automatically print the user's outbound faxes

1. Select the **Automatically print outbound faxes** check box.

2. Under **When to Print**, select whether to print only successfully sent faxes, only faxes that cannot be successfully delivered, or both.

3. Under **What to Print**, select the check boxes next to the items that should print: the fax **History**, **Cover sheet**, and **Body**.

   When printing the fax history, you can include a small image of the first fax page by selecting the **Include thumbnail of first page** check box. Alternatively, to include a small image of the second page of the fax, select the **Skip cover sheet** check box.

4. In the **Printer** box, select a printer.

To automatically print the user's inbound faxes

1. Select the **Automatically print inbound faxes** check box.

2. To only print successfully received faxes, select the **Successful**

receives only check box.

3. In the **Printer** box, select a printer.

Messaging

These settings determine how and when messages are sent to RightFax users to notify them about the status of sent and received faxes. The messages can be sent by email or SMS. The text of these status messages can be customized. For more information, see the *RightFax Administrator Guide*.

Before completing this information, you must configure the messaging service providers in RightFax. See the *RightFax Administrator Guide*.

General Messages

Messaging service

Select the email or SMS messaging service that will send the notification.

To not send notifications of received faxes to this user, select **None for received faxes**.

Fax received

Select this check box to send a message to the user each time a new fax is received. If the TeleConnect module is installed, the RightFax server includes the TeleConnect ID with all notifications of incoming faxes. Users can retrieve faxes without first requesting a fax list.

Fax received from specific CSID/ANI

Select this check box to send a message to the user each time a new fax is received from the specific sender or senders that you enter in the **CSID/ANI to match** box.

CSID/ANI to match

To send a message to the user each time a new fax is received from a specific sender or senders, enter the CSID or ANI numbers for the senders. Separate multiple entries with semicolons.

Outbound fax has been abandoned

Select this check box to send a message to the user each time one of the user's outbound faxes fails to send.

Workflow Messages

Select the messaging services that will send reminders and warnings to this user that a workflow for a fax is due to be completed. For more information, see *Setting up workflows* on page 128.

Reminder Messaging Service

Select the email or SMS messaging service that will send the reminder.

Warning Messaging Service

Select the email or SMS messaging service that will send the warning.

Administrative Alerts

You can define SMS or email alerts for RightFax administrators about specific RightFax events. The text of these status messages can be customized. See the *RightFax Administrator Guide*.

Before completing this information, you must configure the messaging service providers in RightFax. See the *RightFax Administrator Guide*.

In addition to these alerts, you can use the RightFax Alerting and Monitoring service to select from hundreds of server statistics to monitor and define the event thresholds, alert types, and alert messages to send. See the *RightFax Administrator Guide*.

Messaging service

Select the email or SMS messaging service that will send the notification.

Select the check boxes next to the events for which to generate alert messages.

Low disk space (<150MB)

If selected, an alert is sent when free hard drive space on the RightFax server falls below 150 MB.

Critically low disk space (<50MB)

If selected, an alert is sent when free hard drive space on the RightFax server falls below 50 MB.

Event queue full (>90%)

If selected, an alert is sent when the percentage of the fax server's internal Event Queue reaches 90%. For information about RightFax queues, see .the *RightFax Administrator Guide*.

DocTransport service down

If selected, an alert is sent when one of the DocTransports are unable to send or receive faxes.

All DocTransport services down

If selected, an alert is sent when all DocTransports are unable to send or receive faxes.

Probable line failure

If selected, an alert is sent when an error or a series of errors has indicated to the DocTransport that a phone line is not operating correctly.

Probable T1 failure

If selected, an alert is sent when multiple phone lines have failed in such a way that the DocTransport suspects a T1 line is not operating correctly.

Server improperly shut down

If selected, an alert is sent when the RightFax Server module shut down unexpectedly. This may indicate that the operating system has failed or the server has lost power.

Periodic server heartbeat

If selected, a brief notification of the RightFax server's status is sent periodically, including statistics on fax activity. When you select this check box, in the **Interval in minutes** box, enter the number of minutes for the interval at which to take the server's heartbeat.

Received fax failures

If selected, an alert is sent if a received fax has a transmission error or is received with partial pages.

Received with too few DID digits

If selected, an alert is sent if a fax is received with fewer DID digits than are needed to route it. Enter the required number of digits in the **Expected number of digits** box.

About alert frequencies

After an alert is triggered, the problem causing the alert must be remedied within a set length of time before a fault of the same type causes another alert. For example, this prevents free disk space fluctuating around 50 Mb from causing repeated alerts. If an alert condition persists, the alert is repeated periodically. Different types of alerts have different delays and repeat intervals as listed in the following table.

Alerts that are not listed here are sent only one time, when the alert condition occurs.

Alert	Delay	Repeat interval
All DocTransports down.	10 min	60 min
Disk space is critically low (<50MB).	10 min	30min
Disk space is getting low (<150MB).	20 min	60 min
DocTransport service down.	10 min	60 min
RightFax internal queue has reached 90% utilization.	30 min	90 min

Notification

The Notification settings determine whether to notify RightFax users about the status of sent and received faxes. Notifications can be sent by email or SMS. Before you begin, you must configure the messaging service providers in RightFax. See the *RightFax Administrator Guide*.

To customize the text of the notification messages, see the *RightFax Administrator Guide*.

Method

Select a notification method for the user:

- **Use Group's Method**. Use the notification method defined for the group to which the user belongs.

- **SMS**. Send the notification to an SMS-capable device.

- **Email Systems**. Send the notification to the user's email box.

> **Note** Notifications for Notes and Exchange require you to purchase and license a separate module.

- **Custom notification methods**. Custom notification methods are created using the RightFax API. For more information, see the *RightFax API Reference Guide*.

Notification address

Enter an address or other information that specifies where notifcations will be sent for this user. For example, enter the user's email address for email notifications or phone number for SMS messages.

Reroute to another user

- To reroute received fax notifications to another user, select this check box. In the **User ID** box, enter the RightFax user ID.

- To also reroute sent fax notifications to the same user, select the **Include sent fax notifications** check box.

Sent

1. Select the check boxes next to the events about which to notify this user.

2. In the **During transmission** list, select when this user should be notified about sent faxes in transmission: **Never**, **Once Only**, or **Periodically**.

3. In the **Incomplete faxes** list, select when this user should be notified about incomplete faxes: **Never**, **Once Only**, or **Periodically**.

4. To include the fax with email notifications, select the **Include fax with email notifications** check box, and in the lists below, select the format (**TIF** or **PDF**) and whether to include only the **First Page** of the fax or **All Pages**.

Received

1. Select when this user should be notified about received faxes: **Never**, **Once Only - When initially received**, or **Periodically - While fax has not been viewed or printed**.

2. To include the fax with email notifications, select the **Include fax with email notifications** check box, and in the lists below, select the format (**TIF** or **PDF**) and whether to include only the **First Page** of the fax or **All Pages**.

> **Note** If you select All Pages and the user account includes the permission View First Page Only, only the first page will be included.

Other

Update fax list automatically

If selected, the user's mailbox in FaxUtil or FaxUtil Web will be automatically refreshed (scanned for new faxes).

Update interval in seconds

Enter the number of seconds to specify the interval at which automatic fax list updates will occur.

Default Billing Codes

In the respective boxes, specify the Billing Code #1 and Billing Code #2 that will appear in the **Fax Information** dialog box each time the user

sends a fax.

Default printer

Specify a default printer.

Description

Enter any information you want to record about this user account.

Compute Disk Usage

Click to calculate the space on the server that is used by this user's faxes.

Managing user delegates

As an administrator you can manage delegates—users with access to a user's fax mailbox—for a user independent of whether the user has permission to modify delegates. You can assign delegate permissions from system-defined roles or by defining custom roles. For more information about delegate permissions and roles, see *Default delegate permissions by role* on the next page.

- On the **Delegates** menu, select whether to add, edit, or remove delegates. You can also create, edit, and delete custom delegate roles.

Adding and removing delegates

To add delegates for a user

1. Select one or more users in the list.

2. On the **Delegates** menu, click **Manage Delegates**. The **Delegates** dialog box opens with the list of the user's delegates.

3. Click **New**, and the **Add Delegates** dialog box opens.

4. In the **User or group** box, select one or more user or group IDs.

5. In the **Role** list, select the role for the delegate.

6. In the lists of permissions, as needed, select and clear access options.

7. To save the selections as a custom role, select the check box **Save these permissions as a custom** role, and enter a name in the **Custom role ID** box.

8. Click **OK**.

To remove delegates

- Select one or more users in the list, and then click **Delete**.

Managing custom delegate roles

To create or edit a custom role

1. On the **Delegates** menu, click **New Custom Role** or **Edit Custom Role**.

2. In the **Custom role ID** box, enter a name or select a role.

3. To create the role from an existing role, in the **Based on role** list, select the role.

4. In the lists of permissions, select and clear access options.

5. Click **OK**.

To save a custom role

1. With a delegate selected, select a role in the **Role** list.

2. In the lists of permissions, select and clear access options. The

selection in the **Role** list changes to **Custom**.

3. In the **Custom role ID** box, enter a name, and then click **OK**.

To delete a custom delegate role

1. On the **Delegates** menu, click **Delete Custom Role**.

2. In the **Custom Role ID** list, select the role. The permissions for the role appear, but cannot be edited.

3. To confirm the deletion, click **Ok**.

Default delegate permissions by role

Read permissions

	Owner	Editor	Reviewer
Can view faxes.	x	x	x
Can view first page of received faxes.	x	x	x
Can print faxes.	x	x	x
Can view fax history.	x	x	x
Can browse all folders.	x	x	x
Can use phone entries.	x	x	x
Can export images.	x	x	x
Can mail images.	x	x	x

Write permissions

	Owner	Editor	Reviewer
Can create faxes.	x	x	--
Can edit faxes.	x	x	--
Can update fax status.	x	x	--
Can forward faxes.	x	x	--

Can OCR faxes.	x	x	--
Can create folders	x	x	--
Can rename folders.	x	x	--
Can create phone items.	x	x	--
Can edit phone items.	x	x	--
Can annotate faxes.	x	x	--
Can move faxes.	x	x	--
Can route faxes.	x	x	--
Can route faxes	x	x	--
Can annotate faxes with personal stamp	x	x	--

Delete permissions

	Owner	Editor	Reviewer
Can delete faxes.	x	--	--
Can delete folders.	x	--	--
Can delete phone items.	x	--	--

Miscellaneous permissions

	Owner	Editor	Reviewer
Can approve faxes.	x	x	--
Can modify user options.	x	--	--
Can modify delegates.	x	--	--
Can toggle refuse fax distributions.	x	x	--
Requires fax approval. This permission does not apply to faxes that the user creates, including faxes that the user creates as a delegate on behalf of another user.	--	--	--

Chapter 5: Creating groups of users

Every RightFax user must be assigned to a group of users. Group settings determine fax options, cover sheets, and notification options for all of the users in the group.

To open the list of user groups

- In Web Admin, in the left pane, click **Groups**. The list of groups appears in the right pane.

Creating, deleting, copying, and editing groups of users

To create a new group

1. Open the list of groups.

2. Click **New**. The **New Group** page opens.

3. In the **Group ID** box, enter a unique group ID.

   All remaining options are optional. For information on completing these options, see *Editing group properties* on the next page.

To create a new group from an existing group

1. In the list of groups, select the group you wish to copy.

2. Click **New From Selected**. The **New Group** window opens.

3. In the **Group ID** box, enter a unique group ID

   All remaining options are optional. For information on completing these options, see *Editing group properties* on the next page.

To delete a group

1. Select the group or groups in the list.

2. Click **Delete**, and then confirm the deletion.

   > **Note** If you delete the only group assigned a specific library document, then that library document will be marked as expired. It can be deleted, edited, or reassigned to another group.

To edit the properties of an existing group

- Select the group in the list, and then click **Edit**. The **Edit Group** page opens.

Editing group properties

To edit the properties of an existing group

1. Select the group in the list.

2. Click **Edit**. The **Edit Group** page opens.

3. As needed, click the heading of the section you want to edit.

General

General

Group ID

Monitor

Alternate monitors

Maximum body pages

999

☐ Exclusive group
☐ All faxes must be held for preview
☐ Prompt to view all pages
☐ Group members cannot edit delegates
☐ Group members can set their own conversion bias defaults
☐ Group members can upload a user profile picture
☐ Include Web Delivery URL for inbound faxes routed to email
☐ Can import phonebooks

Group ID

Enter a unique ID for the group.

Monitor

Enter the user ID of the primary monitor of this group. The primary monitor has access to all the mailboxes in the group and receives alerts when a user has not printed or viewed a fax before the time specified in **User Notify Time** in the RightFax Server configuration program expires. See the *RightFax Administrator Guide*.

Alternate monitors

Enter up to 9 user IDs of alternate monitors of this group, each in a separate box. When you press TAB to advance to the next box or type an ID in the next box, another entry box is added. Alternate monitors have access to all the mailboxes in the group and receive messages

about faxes belonging to group members if neither the user nor the primary monitor have printed or viewed a fax in the designated interval.

Maximum Body Pages

Specify the maximum number of body pages that a member of the group can send in one fax. This number does not include the cover sheet.

Exclusive group

This option only is available if it is licensed. If selected, the following restrictions apply to all members of this group that are not full administrators:

- When selecting or searching for users, only fellow group members appear.

- When selecting or searching for groups, only this group appears.

Full administrators can view and select all users and groups.

If not selected, all members can see and select all users and groups.

Prompt to view all pages

If the user attempts to close a received fax before all of the pages have been viewed, the system can detect it. Select this option to prompt the user to view all of the pages. If the user doesn't view all of the pages, it will be logged in the fax history.

All faxes must be held for preview

If selected, all faxes for users in the group will be held for preview before they are sent. Users must view the faxes and verify that they should be sent.

Group members can set their own conversion bias defaults

Before documents are rendered in the selected fax resolution, they can be converted with a bias toward improved text legibility, toward improved graphical fidelity, or a bias toward both. If selected, members of the group can select to override the defaults that are set in the RightFax Conversion Engine by setting their own defaults for conversion bias in the client application.

Group members cannot edit delegates

If selected, members of the group can view delegate information but cannot change it.

Group members can upload a user profile picture

With this setting, users can upload profile pictures so that they appear in the header of RightFax applications. The picture shows which user is logged in. When a profile picture has not been uploaded, then the default image is the first two letters of the user name. Select this check box to allow each member of the group to upload a profile picture.

Include Web Delivery URL for inbound faxes routed to e-mail

Select this check box to include the URL for Web Delivery together with the fax image for inbound routed faxes. If the routing format for the user group is set to Web Delivery, only the URL is sent.

Can import phonebooks

Select this check box to allow the users in this group to import phonebooks from text files.

Notification

Notification type

Select the default notification method for the group.

Email notifications

These settings apply if the user's notification method is set to Use Group's Method.

To include the fax in the email notification of successfully sent or received faxes, select the **Include fax with sent fax notifications** or the **Include fax with received fax notifications** check box, select the format (**TIF** or **PDF**), and then select whether to include only the **First Page** of the fax or **All Pages**.

Notify group monitors about faxes that need approval

If selected, the group monitor and the alternate group monitors are notified about all faxes that need approval.

Cover Sheets

You can control the group members' access to specific cover sheets. You can also require the use of a cover sheet and set a default cover sheet.

Cover sheets available to this group

The currently available cover sheets appear in the list. Select or clear check boxes:

- To make an item available, select its check box.

- To make an item unavailable, clear its check box.

To search for items, in the **All selected** or **None selected** box, enter the full or partial name of the item.

Default cover sheet

In the **Default cover sheet** list, select the cover sheet to use as the default cover sheet. To use the default cover sheet assigned by the administrator, select **System Default**. See *Setting default cover sheets on page 63*.

All faxes must have cover sheets

To require members of the group to use a cover sheet on outbound faxes, select the **All faxes must have cover sheets** check box.

Library Documents

You can control the group members' access to specific library documents. You can also specify a library document that will be attached to all faxes by default.

Library documents available to this group

The currently available library documents appear in the list. Select or clear check boxes:

- To make an item available, select its check box.

- To make an item unavailable, clear its check box.

Note that the list of library documents includes expired and inactive documents.

To search for items, in the **All selected** or **None selected** box, enter the full or partial name of the item.

Automatically attach a library document to all faxes

To specify a library document that will be attached to all faxes by default, select this check box. Under **Library document**, select the required library document.

The selected document will be inserted at the front of the body of all sent faxes.

Fax Numbers

You can control the group members' access to specific fax numbers.

Fax numbers available to this group

The currently available fax numbers appear in the list. Select or clear check boxes:

- To make an item available, select its check box.

- To make an item unavailable, clear its check box.

To search for items, in the **All selected** or **None selected** box, enter the full or partial name of the item.

The Automatic Fax Aging tab

RightFax Managed Services includes automatic fax aging. You can also perform manual fax aging using the Faxage.exe utility program. For more information, see the *RightFax Administrative Utilities Guide*.

With automatic fax aging you specify how many days after having been sent or received faxes will be removed from the group members' FaxUtil mailboxes. Automatic fax aging does not delete the fax records from the RightFax database. You can still run reports about the faxes.

To set automatic fax aging

1. To apply these settings to all the user folders, select the check box **Settings apply to all user folders**. To disable fax aging in folders other than Main, clear the check box.

2. For each type of fax, enter the number of days the fax will remain before it is considered aged. To specify that faxes should not be aged, enter 0 (zero).

Option	Description
Deleted fax records	All sent and received faxes that have been deleted.
Received faxes (viewed or printed)	All received faxes that have been viewed or printed.
Received faxes (unviewed and unprinted)	All received faxes that have not been viewed or printed.
Sent faxes (successful)	All faxes that have been successfully sent.
Sent faxes (abandoned)	All faxes that failed to send.
Outbound incomplete faxes	All faxes with the status Information Incomplete.
Certified delivery (SecureDocs website)	All faxes that were sent for Certified Delivery. The faxes will be deleted from the Certified Delivery website. Certified Delivery is a feature of the optional RightFax SecureDocs Module.
Completed with error (red status)	All sent faxes that failed to send. The status indicator for these faxes in the RightFax client applications is red.

Option	Description
Permanent problem (yellow status)	All faxes that encountered a problem in sending that caused the faxes to be retried. The status indicator for these faxes in the RightFax client applications is yellow. (If the fax fails to send after all attempts, then the status changes to red.) For example: - Sent faxes that are in the process of retrying to send. - Faxes that are held for preview. - Faxes with the status Needs Approval. - Faxes with the status Bad Paper. A fax with an overlay form that failed. - Invalid recipient fax phone number. - Invalid billing code.

The Restrictions tab

Forced Scheduling

With forced scheduling, you can restrict the total number of pages or total number of faxes that can be sent simultaneously by group members during a specified time period. The restriction applies to simultaneously scheduled faxes within a time period only. You can reschedule delayed faxes at any time in FaxUtil and Web Admin.

Example The 50 representatives in your organization's Sales group each send 100 faxes per hour, causing delays of more important faxes from other departments and blocking incoming faxes. To avoid this, you define that between 8 A.M. and 5 P.M. members of the Sales group can only send up to 20 pages at a time and that all faxes exceeding that limit will be delayed until 6 P.M.

Enable forced scheduling

Select to enable the forced scheduling feature.

Maximum concurrent pages

Specify the maximum number of fax pages that can be scheduled at one time by all the users in the group.

Maximum concurrent faxes

Specify the maximum number of faxes that can be scheduled at one time by all the users in the group.

Starting time/Ending time

The starting and ending times for the period that the restriction applies. This is written in 24-hour HHMM format. For example, to set the restriction from 8:00 A.M. to 5:30 P.M., set the **Starting time** to 0800, and set the **Ending time** to 1730.

Delay until time

Enter a time after the **Ending** time at which to send delayed faxes. Enter the time in 24-hour HHMM format.

Example If you enter 0800-1730 for the Start/Ending time and 1800 for the Delay until time, all faxes exceeding the limit between 8 A.M. and 5:30 P.M. will be delayed until 6:00 P.M.

> **Note** Do not enter a Delay Until Time that falls between the Starting and Ending times. Doing so will cause delayed faxes to never be sent as they are continuously bumped to the next day.
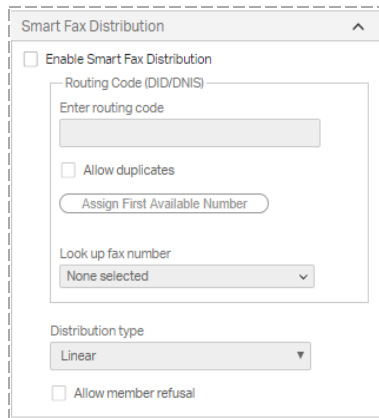
Preferred Email Gateway

You can assign email gateways to process the received faxes and email notifications to user groups. Consider the following constraints:

- If group members are configured for email routing, then email gateways only will route received faxes to the group members that are assigned to the email gateway.

- If group members are configured for email notifications, then email gateways only will process email notifications for the group members that are assigned to the email gateway.

- Once a gateway has been assigned to one or more groups, that gateway only will receive faxes and email notifications for group members that are assigned to the email gateway.

- You must assign all groups to email gateways, or you can create a gateway to receive faxes and email notifications for groups that are not assigned to gateways.

- In the **Preferred Email Gateway** list, select the email gateway to receive the faxes and email notifications for the group.

Smart Fax Distribution

With Smart Fax Distribution, you assign a fax number or routing code to the group. All faxes received by the group will be distributed between the users in the group according to the selected distribution type.

Enable Smart Fax Distribution

Select to enable smart fax distribution for the group.

Routing code (DID/DNIS)

Enter a fax number or routing code for the group.

- To use the next available fax number, click .**Assign First Available Number**.

- To select from the list of fax numbers, click **Look Up Fax Number**, search for the number and select it.

- To disassociate the current number from this group, delete the number from the **Routing Code** box.

> **Note** Each routing code is best assigned to only one user or group. If you assign a routing code to multiple users or groups, only the initial assignee will receive the faxes for the code and will appear as the assignee in the fax number list.

Allow duplicates

Select to allow duplicate routing codes.

Distribution type

Select one of the following:
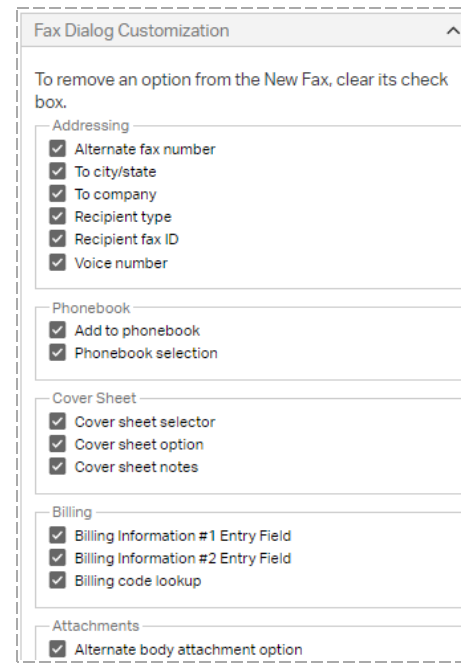
- **Linear**. Faxes are distributed to group members one after the other.

- **Balanced**. Faxes are distributed to group members according to their processing speed, with distribution going first to the user with the fewest unopened faxes.

Allow member refusal

If selected, users can take themselves temporarily out of the distribution loop by selecting **Refuse Distributions** on the **Tools** menu in FaxUtil.

Fax Dialog Customization

Use these settings to customize the appearance of the New Fax dialog box that is used to create and address outgoing faxes. You can hide options that do not apply or are off-limits to users in this group. For more information on the options in the **New Fax** dialog box, see the *RightFax FaxUtil Web User Guide*.

- Clear the check box for each option that you wish to hide.

Chapter 6: Creating signatures

Signature files are specially formatted graphic images (typically of signatures) that RightFax users can use to personalize outbound faxes.

To create a signature file, a user with administrative access and access to FaxUtil selects parts of an image in FaxUtil and stores it as a signature together with identifying information and authorized user information. To add signature files created outside of FaxUtil, refer to the *RightFax Administrator Guide*.

Each signature file is stored in the RightFax database and appears in the Signature list. You can modify file names, descriptions, and authorized user information.

> **Note** RightFax signature files are not supported in outbound PDF documents and do not appear correctly in documents converted using a PostScript driver. Use a PCL driver instead.

To open the list of signatures

- In Web Admin, in the left pane, click **Signatures**. The list of signatures appears in the right pane.

Editing and deleting signature files

To add signature files, refer to the *RightFax Administrator Guide*.

To edit the properties of an existing signature

1. Select the signature in the list.

2. Click **Edit**. The **Edit Signature** page opens. For more information, see *Editing signature file properties* below.
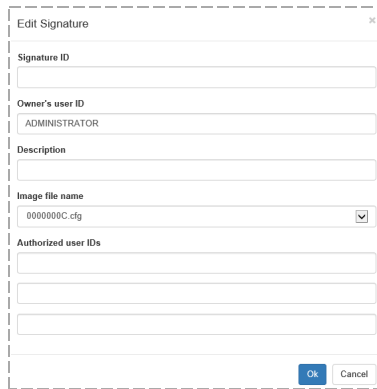
To delete a signature

1. Select the signature in the list.

2. Click **Delete**.

3. Do one of the following to confirm the deletion:

   - To only delete the entry, but not the image file, clear the **Delete associated image file** check box, and then click **Delete**.

   - To delete both the entry and the associated image file, select the check box, and then click **Delete**.

Editing signature file properties

To edit the properties of an existing signature

1. Select the signature in the list.

2. Click **Edit**.

Signature ID

The name of the signature file that appears in the list of signatures.

Owner's user ID

The user ID of the owner of the signature file.

Description

A description of the signature file.

Image file name

The name of the signature image file. This file name is automatically generated and stored in the RightFax database.

Authorized user IDs

Up to three RightFax user IDs or group IDs who are authorized to use this signature in addition to the owner of the signature.

Chapter 7: Creating a stamp library

Stamps are graphic images that can be used to personalize outbound and inbound faxes.

- The library of stamp images is maintained by a RightFax administrator.

- Stamp image files only are available to users who do not have the Disallow Fax Annotations permission.

- Users can create stamps, unless they have the Disallow Fax Annotations permission.

- People who have delegate access to faxes cannot use or edit the personal stamp files of other users.

To open the list of stamp image files

- In Web Admin, in the left pane, click **Stamps**. The list of stamps appears in the right pane.

Creating, deleting, and editing stamps

Administrators can create a library of stamps, and stamps can be created by and for users (known as personal stamps).

Each user can have one personal stamp. Library stamps are listed in alphabetical order, and the personal stamp appears first in the user's list. Personal stamps are not included in the library of stamp images.

To create a library stamp image file

1. Using a graphics program, create a .gif, .tiff, .jpg, .png, or .bmp image. The maximum file size is 1 MB.

2. Click **New**. The **New Stamp** dialog box opens.

3. In the **Description** box, enter a description of the stamp.

4. Click **Select** and select the stamp image file.

5. Click **Ok**.

To import library stamp image files

1. Using a graphics program, create one or more .gif, .tiff, .jpg, .png, or .bmp images. Save the images in a folder that is accessible from the RightFax server. The maximum file size is 1 MB.

2. Click **Import**, and the **Import Stamps** dialog box opens.

3. Browse to locate the image files. Select the files, and then click **Open**.

4. In the **Import Stamp** dialog box, click **Import**.

To delete a library stamp image file

1. Select the stamp image file in the list.

2. Click **Delete**.

To edit the properties of a library stamp image file

1. Select the stamp image file in the list.

2. Click **Edit**. The **Edit Stamp** dialog box opens.

3. You have the following options:

   - In the **Description** box, edit the description of the stamp image.

   - In the **Select** box, import a different stamp image file.

4. Click **Ok**.

To create, edit, or replace a personal stamp file

Chapter 8: Creating overlay forms

Overlay forms are fax image files that RightFax can superimpose over outgoing faxes to give them the appearance of having been printed on the form prior to faxing. Typically they are replicas of documents that your organization uses such as the company letterhead.

You can create and edit forms if your user profile includes the **Can Edit/Add Forms** permission. To create forms, you must also have access to FaxUtil.

After you create an overlay form file, it appears in the list of forms. Each overlay form file is stored in the RightFax database.

To open the list of forms

- In Web Admin, in the left pane, click **Forms**. The list of forms appears in the right pane.

Creating and deleting form files

You can create and edit overlay forms if your user profile includes that permission. For more information, see *Permissions* on page 20.

To create an overlay form

To create an overlay form, refer to the *RightFax FaxUtil User Guide* or *RightFax FaxUtil Web User Guide*.

To edit an overlay form

1. Select the form in the list.

2. Click **Edit**. The **Edit Form** dialog box opens.

3. See *Editing form file properties* on the next page.

4. Click **OK**. The new form appears in the list of forms in EFM and Web Admin.

To delete a form

1. Select the form in the list.

2. Click **Delete**.

3. Do one of the following to confirm the deletion:

- To only delete the entry, but not the image file, clear the
  Delete associated image file check box, and then click
  Delete.
- To delete both the entry and the associated image file, select
  the check box, and then click **Delete**.

Editing form file properties

You can use two overlay forms in a single fax. For example, you might
use a form with the company letterhead for page 1 and an invoice form
for all subsequent pages. See *Configuring two forms for use in a single
fax* on the next page.

To edit the properties of an existing form

1. Select the form in the list.

2. Click **Edit**.

Form number

The number that identifies the form. This is assigned by RightFax when
the form is created.

Form ID

Enter a unique name to identify the form.

Description

Enter a short description of the form.

Image file name

Select the name of the image file of the form. The image file is
generated automatically when the form file is created and stored in the
RightFax database.

Start page

Enter the first page after the cover sheet to which to apply the form. If you enter **1**, the form will appear on the first body page.

> **Note** Page numbers are absolute. If you set the start page to **3** and a document only has two pages, none of the pages will include the form.

Number of pages

To overlay each page of the fax with the form, enter **0** (zero). Otherwise, enter the number of fax pages to which to apply the form.

Next form number

To use a second form, enter its form number.

Secure form

Select this check box to restrict the form to specific groups or users. Click **Authorized group** or **Authorized user**, and then enter the user or group authorized to use the form.

Configuring two forms for use in a single fax

You can set up two forms to be applied one after the other in a single document. For example, the first form might be a form with your company letterhead for the first page and the second form an invoice form for all remaining pages of the document.

To configure two forms for use in a single fax document

1. Create two forms. See *Creating and deleting form files* on page 49.

2. Edit the first and second form according to the instructions in *Editing form file properties* on the previous page.

   - To edit the properties of the first form:

     a. In the **Startpage** box, enter the first page after the cover sheet to which to apply the first form. If you enter **1**, the form will appear on the first body page.

     b. In the **Number of pages** box, enter the number of pages to which to apply the first form. If the first form is only used on the first page, enter **1**.

     c. In the **Next form number** box, enter the form number of the second form.

     d. Click **OK**.

   - To edit the properties of the second form:

     a. In the **Start page** box, enter the first page number to which to apply the second form. In most cases, this value is set to **2**.

     b. In the **Number of pages** box, to have the second form appear on all subsequent pages, enter **0** (zero). Otherwise, enter the number of pages to which to apply the second form.

     c. Click **OK**.

Chapter 9: Connecting printers and scanners

You can define an unlimited number of network printers in RightFax and make them available for automatic printing of faxes and other automated network print functions. Printers can be added individually or imported in groups from your network.

To configure printers and print-to-fax devices that allow RightFax users to fax documents from native applications, see the *RightFax Administrator Guide*.

To open the list of printers

- In Web Admin, in the left pane, click **Printers**. The list of printers appears in the right pane.

Creating, deleting, and copying a printer

To add a new printer to RightFax

1. Click **New.**

2. Enter a **Printer ID** and the remaining printer properties. For more information, see *Editing printer properties* below.

To delete a printer

1. Select the printer in the list.

2. Click **Delete**. Confirm that you want to delete the printer.

Editing printer properties

To edit the properties of an existing printer

1. Select the printer in the list.

2. Click **Edit**.

Printer ID
The printer's network ID.

Description

Enter a description of the printer. To show only the **Printer ID** in the **Print** dialog box, leave this box blank.

Printer type

Select the printer driver used by RightFax to format faxes printed to this printer. Choose the one that most closely corresponds to your printer.

Direct TCP/IP printing

Select this check box to allow faxes to be printed to an IP port on a printer using the LPR, a TCP/IP utility.

Server name

Indicate on which file server the queue exists. If the queue is in NDS, this is the value at the top of the tree.

Queue name

Depending on your network operating system, this can be one of the following:

- The share name of the queue (LAN Server and Windows-based networks)

- The Bindery name of the queue, for example "LASER1." (Netware)

- The Distinguished Name of the queue object, for example "LASER1.SALES.ACME." (NetWare servers using NDS)

Default paper size

Select how RightFax scales a fax page to fit onto the printable area of a laser printer and the paper size:

- **No Scaling**. The image is not scaled which can result in some portion of the page being truncated.

- **Fit Letter**, **Fit Legal**, **Fit A4**. The fax page is scaled to fit onto the printable area of the indicated paper size: U.S. letter (8.5 × 11 in.), U.S. legal (8.5 × 14 in.), or A4 (210 × 297 mm).

If you receive faxes in a mix of letter and legal sizes and use dual-bin laser printers, select **Fit Letter/Legal** or **Fit A4/Legal** to let the laser printer select the size paper that corresponds to the size of the fax page.

Default paper source

Determines which paper tray selection command RightFax sends to the printer. Select **None** if the default paper size is set to **Fit Letter/Legal** or **Fit A4/Legal**.

Importing printers into RightFax

You can import printers from your network into RightFax. To appear in the network, printers must be shared in Windows Active Directory.

To import printers

1. Click **Import**.

2. Select the **Domain** from which to import.

3. To change the default printer characteristics by which to search,

under **Default Printer Settings**, select the printer driver, paper size, and paper source, and whether to search for printers set to print to an IP port.

4. Click **Select Printers**. Depending on the size of the network, this scan can take several minutes.

   The list of available printers appears.

5. In the **Printer type** box, select **PCL** or **Postscript**.

6. Select the printers, and then click **OK**.

Configuring RightFax to automatically print faxes

After defining at least one network printer, you can configure RightFax user profiles to automatically print sent or received faxes.

> **Note** The ability to automatically print sent and received faxes can also be configured by individual users in the FaxUtil client application.

To configure a user to automatically print sent and received faxes

1. Add at least one network printer. For more information, see *Creating, deleting, and copying a printer* on page 52.

2. Open the user ID you want to configure. For more information, see *Creating, deleting, copying, and editing users* on page 18.

3. Configure the user profile settings to automatically print sent and received faxes. For more information, see *Automatic Printing* on page 27.

Chapter 10: Creating billing codes

RightFax can track and report about faxes with billing codes. Users can be required to enter one or two codes for every fax before it can be sent or deleted. RightFax provides two billing code fields (Billing Code 1 and Billing Code 2) for each faxed document.

Billing codes can be validated internally against a master table or externally using a separate application, such as an accounting program. To validate billing codes internally, you must create a list of valid billing codes in RightFax. Your organization can use:

- Both billing codes on faxes, such as one code for account number and one for a matter number.

- Only one billing code, for example to track the individual or department sending the fax.

- No billing codes.

To open the list of billing codes

- In Web Admin, in the left pane, click **Billing Codes**. The list of billing codes appears in the right pane.

Customizing the use of billing codes

You can do any of the following:

- Change the labels for billing codes 1 and 2. By default they appear in the RightFax client applications as **Account** and **Matter**.

- Require that all users enter one or both billing codes with each fax sent.

- Require billing codes for received faxes to track information about received faxes.

- Validate billing codes against the RightFax billing code list or against a list in an external application. If a supplied billing code does not match a billing code in the list, it is rejected and the fax is not sent.

  Validating against a list in an external application requires creating a custom utility using the RightFax API. For more information, see https://mysupport.opentext.com or contact OpenText for implementation services.

To change the Account and Matter (billing code 1 and 2) labels

1. Click **Options**.

2. Enter the new descriptions in the **Label for billing code 1** and **Label for billing code 2** boxes.

To require billing codes before a fax can be sent

1. Click **Options**.

2. Select the **Required for sending** check box under either or both **Label for billing code 1** and **Label for billing code 2**.

Fields that you have marked as required will appear bold in the **Fax Information** dialog box.

To require billing codes on received faxes

1. Click **Options**.

2. Select the **Required for receiving** check box under either or both **Label for billing code 1** and **Label for billing code 2**.

   Users can manually assign billing codes to their received faxes in the client applications.

To validate billing codes

1. Click **Options**.

2. Select the **Validate billing codes** check box.

Creating, deleting, and copying billing codes

To create a billing code

- Click **New**. The **Edit Billing Code** dialog box opens. For information on completing each of the options, see *Editing billing code properties* below.
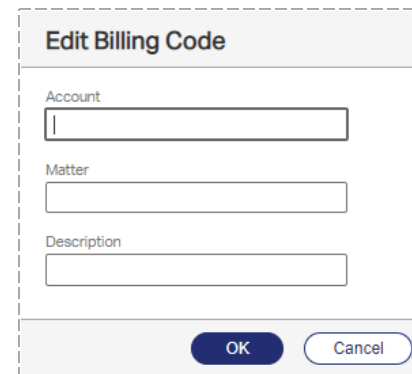
To delete a billing code

- Select the billing code or codes in the list, click **Delete,** and then confirm the deletion.

Editing billing code properties

To edit the properties of an existing billing code

- In the list, select the billing code, and then click **Edit**.

Account, Matter
Enter one or two billing codes.

Description
Enter a descriptive name for the billing code.

Making ODBC billing codes available in FaxUtil

You can make billing codes from an external ODBC source available to your users so they can use them in their outbound faxes.

Each client workstation must be configured individually. After you configure the ODBC information on a user's workstation that has FaxUtil installed, that user can look up ODBC billing codes when sending faxes from FaxUtil.

To access the ODBC billing codes

1. In the Windows task bar, right-click the RightFax tray icon, and click **ODBC Configuration**. The **Configure ODBC Tables** window opens.
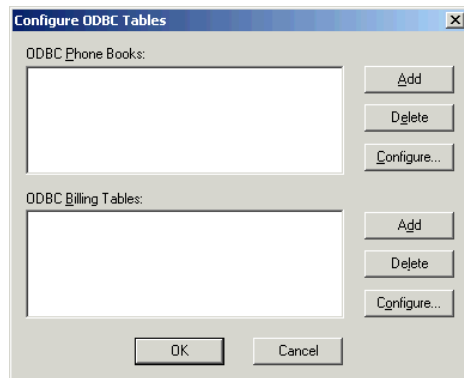
2. Under **ODBC Billing Tables**, click **Add**. The **Configure ODBC Billing Table** window opens.
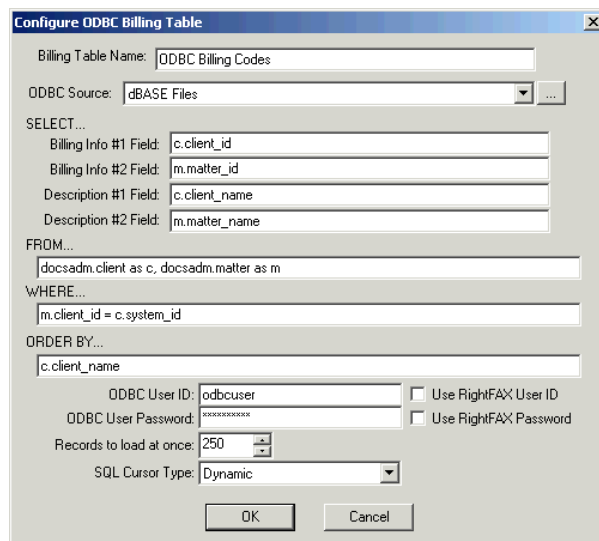
3. Fill in the information according to your ODBC database specifications.

Billing Table Name

Enter a descriptive name for this billing codes table.

ODBC Source

Enter the name of your ODBC billing codes data source.

ODBC Field Names

Relates the fields of the ODBC database to the standard RightFax billing code fields. This is done with simple SQL query statements.

ODBC User ID and Password

Enter the ID and password to access the ODBC database. If the ID and password match those used to log into RightFax, you can select those check boxes instead.

Records to Load at once

Select a number to limits the number of records listed at one time during billing code lookup.

SQL Cursor Type

Select an SQL cursor type. In most cases, this option should be set to **Dynamic**.

Chapter 11: Creating fax cover sheet templates

Fax cover sheet templates determine the information included on the cover sheet for each outgoing fax. They usually include information about your organization—such as logo, address, and phone number—and codes that represent specific sender and destination information.

The information on a RightFax cover sheet must fit on one page. Any cover sheet information appearing on subsequent pages will be ignored.

The RightFax server includes cover sheet template files that you can modify or use as examples when creating your own templates. The template files are located in RightFax\FCS\Imported.

You can create multiple cover sheet templates, such as a cover sheet for each department or separate cover sheets for different types of fax documents.

You can create the following types of cover sheet templates:

- HTML. See *Creating an HTML cover sheet template* below.

- Microsoft Word. See *Creating a Microsoft Word cover sheet template* on the next page.

- PostScript. See *Creating a PostScript cover sheet template* on the next page.

- Printer control language (PCL). See *Creating a PCL cover sheet template* on the next page.

In general, PostScript and PCL cover sheet templates convert to fax format more quickly than HTML and Microsoft Word cover sheet templates.

After you create the cover sheets you need, import the files into RightFax. See *Managing cover sheet template files* on page 62.

To open the list of cover sheets

- In Web Admin, in the left pane, click **Cover Sheets**. The list of currently available cover sheets appears in the right pane. The default cover sheet is highlighted in bold text.

Creating an HTML cover sheet template

Use an HTML editor or a text editor to create HTML and HTM cover sheet templates. The templates can include any text and graphic supported by these file types.

When creating an HTML cover sheet template, follow these guidelines:

- Use absolute paths to reference other files, such as graphics.

- Use cover sheet codes to specify information such as sender and destination data. For instructions, see *Inserting cover sheet codes* on the next page for a list of valid codes, see *Cover sheet codes* on page 60.

- Save the file with a file name extension of .htm or .html.

Creating a Microsoft Word cover sheet template

When creating a Microsoft Word cover sheet template, follow these guidelines:

- Word cover sheets support all language character sets supported by Word and Windows, including Hebrew. To show special characters, such as French accents, verify that ANSI mode is enabled on the code page of the server. See the *RightFax Administrator Guide*. Word cover sheet codes can also use any TrueType font.

- Use cover sheet codes to specify information such as sender and destination data. For instructions, see *Inserting cover sheet codes* below. For a list of valid codes, see *Cover sheet codes* on the next page.

- Save the file with a .docx extension.

Creating a PostScript cover sheet template

To create a PostScript cover sheet template, start with a Microsoft Word 2016 or later source file.

In the Word file, you can use cover sheet codes to specify information such as sender and destination data. For instructions, see *Inserting cover sheet codes* below for a list of valid codes, see *Cover sheet codes* on the next page.

RightFax is shipped with a sample PostScript cover sheet template, located in the folder RightFax\FCS.

To create a PostScript cover sheet template

1. On the RightFax server in Windows Control Panel, add a local printer and choose the RightFax printer driver. See your Microsoft documentation for instructions.

2. Print the .docx file to the RightFax printer.

3. Save the file with the file name extension .ps.

Creating a PCL cover sheet template

To create a printer control language (PCL) cover sheet template, use an application that can print to PCL5 . First create a source file (such as a .doc or .txt file), and then output this file to PCL. Store both the source file and the PCL output on the RightFax server. This is recommended so that you can modify the template at a later time. The PCL file cannot be edited.

When creating a PCL 5-compatible cover sheet template, follow these guidelines:

- For .doc source files, PCL cover sheets only can be created for Microsoft Word 2010 and previous versions. For later versions of Microsoft Word, convert the file to PostScript. See *Creating a PostScript cover sheet template* above.

- Use cover sheet codes to specify information such as sender and destination data. For instructions, see *Inserting cover sheet codes* below for a list of valid codes, see *Cover sheet codes* on the next page.

- To save the source file as a PCL file, print the document to a file, and select a printer driver that supports PCL 5 or later.

- Save the file with the file name extension .pcl.

RightFax is shipped with sample PCL cover sheet files, located in the folder RightFax\FCS\PCL_Source.

Inserting cover sheet codes

When the RightFax server generates a cover sheet for an outgoing fax, it replaces the cover sheet codes in the template with the data they represent. For a list of codes, see *Cover sheet codes* on the next page.

To insert a code in an htm and html cover sheet template

- In the desired location of the html cover sheet, type **{*coversheetcode*}**.

Example For the recipient's company name, you would type **{FROMPHONENUM}**.

To insert a code in a PCL cover sheet template

- In the desired location of the PCL cover sheet, in the source file, type **<coversheetcode>** and apply a native printer font to both the angle brackets and the code.

  > **Note** The remaining text can use any font. When the cover sheet template is printed to PCL format, only text formatted with native printer fonts is stored in text format. All other font types are converted to graphic images. Any cover sheet code not formatted in a native font will appear on the cover sheet instead of being replaced by its associated data.

  Example For the recipient's company name, you would type and apply a native printer font to **<FROMPHONENUM>**.

To insert a code in a Microsoft Word cover sheet template

1. In the desired location of the Word cover sheet, insert the Document Automation field **DocVariable**, and then click **Field Codes**.

   > **Note** If you place a cover sheet code in a Word text box, make sure the box is large enough to fit all of the text that replaces the codes.

2. In the **Field codes** box, type **"coversheetcode"** so that the text in the box appears as DOCVARIABLE "*coversheetcode*".

   > **Note** Do not use double-byte characters into the DocVariable field. While double-byte characters added to the text of a Microsoft Word cover sheet convert correctly, double-byte characters inserted into DocVariable fields do not.

Example For the recipient's company name, you would insert DOCVARIABLE "**FROMPHONENUM**".

3. Click **OK**. To view the added code, right-click in the location of the inserted DocVariable, and then click **Toggle Field Codes**. The inserted variable becomes visible.

4. Apply a TrueType or native printer font to {DOCVARIABLE "*coversheetcode*"*MERGEFORMAT}

Cover sheet codes

Not all cover sheet codes are supported in all formats. Refer to the following table for a list of available cover sheet codes.

Cover sheet code	Maximum characters	Description
BILLINFO1	15	Billing code 1 (if any).
BILLINFO2	15	Billing code 2 (if any).
CALL_BACK CALLBACK2	31	The callback information (if any). > **Note** Not for Microsoft Word cover sheets.
CCTEXT	69	All the listed recipients of a fax (including CC and BCC recipients) in this format: Name,FaxNum;Name,Faxnum;... You can include up to 21 {CCTEXT} codes on a cover sheet, each code representing one line of recipients up to 69 characters long. Include one {CCTEXT} code on each line that contains recipients. The cover sheet only lists the number of recipients for which space is provided.

Cover sheet code	Maximum characters	Description
DATEONLY	Variable	The date that the fax cover sheet was generated. The date format is determined by the default date format on the RightFax server. **Note** Not for Microsoft Word cover sheets.
EMAIL_ADDRESS	Variable	The sender's email address from the RightFax user properties (See *Editing a user profile* on page 19). **Note** Not for Microsoft Word cover sheets.
EMAILADDRESS	Variable	The sender's email address from the RightFax user properties. (See *Editing a user profile* on page 19.)
FAXDATE	Variable	The date that the fax is created. **Note** Not for HTML or PCL cover sheets.
FAXDIDNUM	31	The sender's fax number.
FAXSENDDATE	Variable	The date that the fax was sent. **Note** Not for HTML or PCL cover sheets.
FROMCOMPANY	59	The sender's company name.
FROMCITYSTATE	59	The sender's city and state.
FROM_NAME	59	The sender's name. **Note** Not for Microsoft Word cover sheets.
FROMNAME	59	The sender's name.
FROM_PHONENUM	31	The sender's phone number, **Note** Not for Microsoft Word cover sheets.

Cover sheet code	Maximum characters	Description
FROMPHONENUM	31	The sender's phone number, available for all three types of cover sheets.
FROMPHONE	31	The sender's phone number, **Note** Not for HTML or PCL cover sheets.
GENERALFAXNUM	31	The company fax number for the sender's organization.
NOTETEXT	69	The notes added to the fax when it was addressed. You can include up to 21 <NOTETEXT> codes on a cover sheet, each code representing one line of notes up to 69 characters long. Include one <NOTETEXT> code on each line that you want notes to be listed on. The cover sheet only includes as much note text as there is space allotted for. If the notes for a fax are shorter than the space provided by <NOTETEXT> codes, the remaining lines will be filled with blanks.
NUMPAGES	Variable	The number of pages in the fax body, not including the cover sheet. To include the cover sheet in the page count, use the <NUMPAGESC> code.
NUMPAGESC	Variable	The number of pages in the fax *including* the cover sheet. To exclude the cover sheet in the page count, use the <NUMPAGES> code.
OPERATORNUM	31	The general phone number for the sender's organization.
ROUTEINFO	Variable	The routing information entered in the user profile of the user creating the fax. (See *Routing* on page 25).

Cover sheet code	Maximum characters	Description
TIMEONLY	Variable	The time that the fax cover sheet was generated. The time format is determined by the default time format on the RightFax server. **Note** Not for Microsoft Word cover sheets.
TO_CITYSTATE	59	The recipient's city and state, **Note** Not for Microsoft Word cover sheets.
TOCITYSTATE	59	The recipient's city and state.
TO_COMPANY	59	The recipient's organization name. **Note** Not for Microsoft Word cover sheets.
TOCOMPANY	59	The recipient's organization name.
TO_CONTACTNUM	31	The recipient's phone number. **Note** Not for Microsoft Word cover sheets.
TOCONTACTNUM	31	The recipient's phone number.
TO_FAXNUM	31	The recipient's fax number. **Note** Not for Microsoft Word cover sheets.
TOFAXNUM	31	The recipient's fax number.
TO_NAME	59	The recipient's name. **Note** Not for Microsoft Word cover sheets.
TONAME	59	The recipient's name.
UNIQUEID	16	The unique ID assigned to the outgoing fax.

Cover sheet code	Maximum characters	Description
USERID	59	The RightFax User ID. **Note** Not for HTML or PCL cover sheets.
USERNAME	59	The RightFax User Name, **Note** Not for HTML or PCL cover sheets.
WHEN_FAXED	Variable	The date and time the document was generated by the fax server. The time the fax was processed by the fax server can differ largely from the time it is actually sent as recorded on the TTI line, especially if you are using the RightFax Delay Send feature. **Note** Not for HTML or Microsoft Word cover sheets.
WHENFAXED	Variable	The date and time the document was generated by the fax server. The time the fax was processed by the fax server can be very different from the time it is actually sent as recorded on the TTI line, especially if you are using the RightFax Delay Send feature.

Managing cover sheet template files

The list of cover sheets includes all cover sheet templates currently available in RightFax. You can import additional cover sheet files, edit information about existing files, and delete files no longer needed.

Note RightFax only imports the first 21 characters of cover sheet file names from the \FCS folder. File names of imported cover sheets must be unique within the first 21 characters.

To add a cover sheet to the list

1. Click **New**.

2. Enter the following information:

   - **ID**. The text string that will appear when a user selects a cover sheet.

   - **Description**. The text string that will appear in the cover sheet list.

   - Click **Select**, and browse to the location of the cover sheet file. Select the file and click OK.

3. Click **Ok**. The cover sheet is copied to RightFax and appears in the list of cover sheets.

To delete a cover sheet from the list

- Select the cover sheet or sheets in the list, click **Delete**, and then click **Delete** to confirm the deletion.

To edit a cover sheet ID, description, or file name

1. Select the cover sheet, and then click **Edit**.

2. You can change any of the following information:

   - **ID**. The text string that appears when a user is selecting a cover sheet.

   - **Description**.The text string that appears in the cover sheet list.

   - To choose a new file for the ID, click **Select,** and browse to the location of the new file. Select the file, and then click **Open**.

3. Click **Ok**.

To preview a cover sheet file

You can preview Word, PostScript, PCL, and HTML cover sheet files.

- Select the cover sheet in the list, and then click **View**. Word files open in Microsoft Word in read-only mode, and HTML files open in your browser.

Granting user permission to select a cover sheet

If your organization has several fax cover sheets for different types of faxes, users with the appropriate permission can select which cover sheet to use for any fax they send.

Users can also include the <FCSFILE> code in documents to specify a cover sheet file for that document. See the *RightFax Administrator Guide*.

To set the user permission Can Change Cover Sheets

- See *Cover Sheets Defaults* on page 24. Select the check box for the permission **Can Change Cover Sheets**.

Setting default cover sheets

When a user sends a fax, RightFax creates the cover sheet using the default template. You can define the following defaults settings:

- A default cover sheet for each user. The indicated file is used if the user does not select a cover sheet when sending a fax.

- A default cover sheet for a group of users. The indicated file is used if the user does not select a cover sheet and does not have a default user cover sheet.

- A default cover sheet for the entire system. The indicated file is used when the user does not select a cover sheet and has neither a default user or group cover sheet defined. The cover sheet template selected as the system default appears in bold text in the list of cover sheets.

To assign a default cover sheet to a RightFax user

- See *Cover Sheets Defaults* on page 24.

To assign a default cover sheet to a group of RightFax users

- See *Cover Sheets* on page 39.

To change the system default cover sheet

- Select the cover sheet in the list, and then click **Set default**.

Setting required cover sheet information

As the administrator, you can specify the cover sheet information that users must enter when sending or after receiving a fax.

To require cover sheet information

1. In the left pane, click **Cover Sheets**, and then click **Options**.

2. Under **Sending Required Fields**, select the check boxes next to the fields required for sending faxes. The **To fax number** option is always required. If a user sends a fax without filling in all required fields, the fax remains in the user's mailbox with the status *Information Incomplete*.

3. Under **Receive Required Fields**, select the check boxes next to the fields required for received faxes. If a fax arrives that does not include all required fields, the recipient will not be able to delete the fax until the required fields have been completed.

Chapter 12: Managing library documents

You can store frequently faxed documents (such as company literature, credit applications, or employment forms) in a fax document library for easy retrieval. Library documents are stored in a format that does not require document conversion before transmission.

Your server configuration determines whether library documents are stored in the default RightFax\Image folder on the RightFax server or in a SQL database, and whether they are encrypted.

Library documents can be added as attachments when sending a fax or specified in the embedded codes <LIBDOC> or <LIBDOC2> to be sent in addition or instead of other documents. See the *RightFax Administrator Guide*.

To create, edit, or manage library documents, your user profile must include the **Can Edit/Add Library Docs** permission. To create library documents, you must also have access to the FaxUtil application.

Creating a new library document

You create a library document by sending a fax to your mailbox and then saving it in the document library.

The new document will be available in the **Library Documents** list for all users except those in groups that do not have access to all library documents. For information about editing this group property, see *Cover Sheets* on page 39.

To create a new library document in FaxUtil Web

1. Create the document in a word processor or other application from which you can print to the RightFax fax printer.

2. Send the fax image to your fax mailbox.

3. Open the received fax in FaxUtil Web, and on the **Fax** menu, click **Add to Library**. The **Add to Library** dialog box opens.

4. Specify a **Document ID** and **Description** for the new library document. For information about these and the remaining options, see *Editing library document properties* on the next page.

5. Click **OK**.

   If you entered an existing document ID, confirm that you want to overwrite the existing document.

   The new document will be available in the **Library Documents** list for all users except those in groups that do not have access to all library documents. For information about editing this group property, see *Cover Sheets* on page 39.

To create a new library document in Web Admin

1. Create the document in a word processor or other application from which you can print to the RightFax fax printer.

2. Send the fax image to your fax mailbox.

3. In Web Admin, in the left pane, click **Library Documents**.

4. In the right pane, click **New**. The **New Library Document** dialog box opens.

5. Specify a **Document ID** and **Description** for the new library document. For information about these and the remaining options, see *Editing library document properties* below.

6. Click **OK**.

   If you entered an existing document ID, confirm that you want to overwrite the existing document.

To automate the creation of new library documents

- Use the NEWLIB and NEWLIB2 embedded codes. For information about using these and other embedded codes, see the *RightFax Administrator Guide*.

Editing library document properties

To edit the properties of an existing library document

1. In Web Admin, in the left pane, click **Library Documents**.

2. Select the document in the list, and on the **Edit** menu, click **Edit**.

Edit Library Document

Document ID
SAMPLELIBDOC

Description
Sample Library Document

Image file name
sample

Pages
1

Availability
- ☑ LAN access
- ☑ Web access
- ☐ Fax on Demand access

Password

☐ Include in catalog

☐ Activation date
3/24/2020

☐ Expiration date
3/24/2020

OK   Cancel

Document ID
Enter a unique code that identifies the library document.

To make the library document available via the Web or Fax-on-Demand, assign a numeric document ID. See *RightFax Docs-on-Demand Module Administrator Guide*.

Description

Enter a descriptive name for the library document.

Image file name

The name of the library document file. This is generated automatically when the library document is created and doesn't change.

Pages

Enter the number of pages in the document.

LAN access

Select to make the library document available on the local area network for faxing from client workstations.

Web access

Select to make the library document available to users via RightFax web client applications.

Fax on Demand access

Select to make the library document available to users via touch tone phone using Fax on Demand.

Password

Enter the numeric password that is required by Fax on Demand when users request this document.

Include in catalog

Select to include this document in the Fax on Demand catalog of available faxes.

Activation date

The library document becomes available immediately unless you select this check box to set a later activation date. After selecting the check box, enter the date when the library document will become available for use.

Expiration date

The library does not have an expiration date unless you select this check box to set an expiration date. After selecting the check box, enter the date when the library document will become unavailable.

Deleting library documents

To delete a library document

1. Select the document or documents in the list.

2. Click **Delete**, and then confirm the deletion. Select the check box **Delete associated image file** if you wish to delete the library document file.

Chapter 13: Adding messaging services for notification messages

The RightFax server can send emails or SMS messages to RightFax users and administrators to alert or notify them of specific RightFax events. To send these alerts and notifications from RightFax, you must configure the services and providers in RightFax.

To configure RightFax SMS Service, refer to the *RightFax Administrator Guide*.

Adding messaging services

To add a messaging service to RightFax

1. In Web Admin in the left pane, click **Messaging Services**.

2. Click **New**. The **New Messaging Service** dialog box opens. See *Editing messaging service properties* below.

After adding the necessary messaging services, you can configure the notifications and alerts:

- To configure fax status notifications and their mode of delivery for individual users, see *Notification* on page 30. You can also configure a default notification method per group of users. See *General* on page 37.

- To configure administrative alerts for individual administrative users, see *Administrative Alerts* on page 29).

- To use the RightFax Alerting and Monitoring service to create and

customize a list of server statistics to monitor and alert on, see the *RightFax Administrator Guide*.

Editing messaging service properties

Each type of service you add requires different configuration settings.

Configuring SMTP services

Service ID

Enter a descriptive ID for the service provider or type of service.

The service ID of an existing service cannot be changed. If you enter a new service ID for an existing service, RightFax creates a copy of the service with the new name.

Service type

Select **SMTP**.

External connection

Select the SMTP connection through which emails will be sent. If the SMTP connection is not listed, click **New**, and see *Configuring an SMTP connection* on page 101.

SMTP sender address

Some SMTP message servers require the sender's SMTP address to process transactions. If required, enter the SMTP email address from which the message will be sent.

Configuring SMS via Push-Proxy Gateway services

Service ID

Enter a descriptive ID for the service provider or type of service.

The service ID of an existing service cannot be changed. If you enter a new service ID for an existing service, RightFax creates a copy of the service with the new name.

Service type

Select **SMS**. In the **SMS Service selection** dialog box, select **Push Proxy Gateway**, and then click **OK**.

PPG host address

Use the default value for the PPG host.

PPG port number

Use the default value for the PPG port number.

Logging administrative alerts

Administrative alerts are logged in the Windows Event Log with a special event identifier. Using this identifier, Windows monitoring systems can identify when an alert has occurred without monitoring the contents of the event entry.

To ensure that logging occurs using the special event identifier

- For each alert type, set up at least one user to receive it.

If no users are set up to receive alerts, none are logged in the Event Log using the special event identifier.

To filter on these events

- Enter the following:
  source = "RightFax Server Module" and Category = "Administrative Alert"

Chapter 14: Managing fax numbers

You can maintain a list of your organization's fax numbers in RightFax. The list shows whether a number has been assigned as a routing code to a user id. The user ID can be that of a user or of a group.

To open the list of fax numbers

- In Web Admin, in the left pane, click **Fax Numbers**. The list of fax numbers appears in the right pane.

Adding and deleting fax numbers

You can add your organization's fax numbers as individual numbers, as a range of numbers, or import them from a .csv (comma-separated values) file. The numbers can then be added as routing codes to users and groups, with RightFax keeping track of which numbers are assigned and which are available.

> **Note** To assign a fax number to a group, Smart Fax Distribution must be enabled.

Any non-numeric characters in the import file, such as parentheses, will be stripped when imported. If an entry contains the user id of a user or group (*faxnumber*,*userid*), the fax number will be automatically added as the routing code to the user's or group's profile.

The length of the fax number depends on your telephone system.

To add individual fax numbers

1. Open the list of fax numbers.
2. Click **New**.
3. Click **Single number**.
4. In the box, type the fax number, and then click **Ok**.

To add a range of fax numbers

1. Open the list of fax numbers.
2. Click **New**.
3. Click **Range**.
4. In the first box, enter the lowest fax number in the range.
5. In the second box, enter the highest fax number in the range.

> **Note** You cannot create more than 5000 fax numbers at one time.

To import fax numbers from a .csv file

1. Open the list of fax numbers.
2. Click **Import**, and then click **Choose File**.
3. Find and select the .csv file, and then click **Import**.
4. A status message shows how many fax numbers were processed and how many of them were not imported.

To delete a fax number

1. Check if a number you want to delete is associated with a user or group. If yes, edit the user or group to disassociate the number.

2. Select the fax number or numbers in the list, and click **Delete**.

3. Click **Delete** to confirm the deletion.

Assigning a fax number to a user or group

Perform this task to assign a fax number as the routing code to a user's or group's profile. This may not be necessary if the fax numbers were imported from a file that included the associated user and group IDs.

> **Note** To assign a fax number to a group of users, Smart Fax Distribution must be enabled.

To assign a fax number to a user

- Under **Routing**, in the **Routing code (DID/DNIS)** box, enter the fax number. See *Routing* on page 25

To assign a fax number to a group of users

- Under **Smart Fax Distribution**, in the **Routing code (DID/DNIS)** box, enter the fax number. See *Smart Fax Distribution* on page 42.

To remove a fax number assignment

- Under **Routing** for the user or **Smart Fax Distribution** for the group, delete the fax number or enter a different number.

Activating fax numbers in the RightFax Connect Portal

If your RightFax implementation routes faxes to RightFax Connect and you plan to port fax numbers, you must activate the fax numbers in the RightFax Connect Portal prior to the scheduled port date.

To activate fax numbers in the RightFax Connect Portal

1. Log on to the RightFax Connect Portal.

2. Under **Action Menu**, click **Manage Fax Numbers**.

3. In the **Available Numbers** list, select the check boxes of the fax numbers.

   If the numbers do not appear in the list, click , fill in the necessary information of the range of fax numbers to receive, and then select the fax numbers to activate. The numbers must include the complete country code, region, and area/city code.

4. Click **Activate**, and then click **Save Changes**.

Chapter 15: Running RightFax reports

In Web Admin you can generate a variety of reports of the information stored in the RightFax database about sent and received faxes.

To schedule a report to run once on another day or to run on a recurring schedule, see the *RightFax Administrator Guide*.

To generate RightFax reports from Enterprise Fax Reporter or from a command line from the RightFax server or a client workstation, see the *RightFax Administrative Utilities Guide*.

Generating RightFax reports

To run reports, the permission Can Run Reports must be enabled for the logged in user.

To open a report

1. In Web Admin, in the left pane, click **Reports**.

2. In the right pane, click **Open**. In the **Select Report** dialog box, select the report, and then click **Next**.

3. In the **Parameters** dialog box, enter all required parameters, such as the time frame. The parameters vary by report. See *Entering report parameters* below.

Entering report parameters

After selecting a report to generate, you are prompted to enter the parameters for which to show data, most commonly a date range.

Specifying a date range

To enter a range of dates

1. Under **Select start date**, do one of the following:

   - Enter a start date.

   - To include all data up to a specified end date, select **No lower limit**.

2. Under **Select end date**, do one of the following:

   - Enter an end date.

   - To include all data after the specified start date, select **No upper limit**.

Specifying RightFax users

To enter RightFax users

- In the **User** box, do one of the following:

   - To select all users, enter an asterisk (*).

   - To specify a user or users, enter the RightFax user ID or part of a user ID. You can enter an asterisk (*) to search for any one or more characters and ? to search for any one character.

Specifying destinations

Destinations may be fax numbers, remote IDs (the name or telephone number of the sending fax machine), company, or recipient names.

To enter destinations

- Under **Destination**, do one of the following:
  - To select all fax numbers, remote IDs, companies, or names, enter an asterisk (*).
  - To specify one or more destinations, enter the fax number, remote ID, company name, or name. You can enter an asterisk (*) to search for any one or more characters and ? to search for any one character.

Specifying actions to audit

To select actions to audit

- Under **Action**, do one of the following:
  - To select all actions, click **All**.
  - To run the report on a specific action, click **Added**, **Deleted**, **Modified**, or **Login**.

To specify types of objects to audit

- Under **Object**, do one of the following:
  - To select all object types, click **All**.
  - To run the report on a specific type of object, click **Group**, **User**, or **Delegate**.

To specify values to audit

- Under **Users and groups**, do one of the following:
  - To select all RightFax users or groups, enter an asterisk (*).
  - To select a specific RightFax user or group, enter the user or group ID. You can enter an asterisk (*) to search for any one or more characters and ? to search for any one character.

Calculating phone costs

To specify phone time costs

- Under **Cost per minute for phone time**, enter the number.

Specifying the number of channels

To specify the number of channels

- Enter the number of channels in the box.

Specifying a log out action

The LogOut action is when the user logs out. The AdminLogOut action is when the administrator removes the connection from the list of connections in Web Admin.

To select a log out action

- Under **Corollary action**, click **All**, **LogOut**, or **AdminLogOut**.

Saving a report to file

To export fax report information to a specific file format

- In the **Parameters** dialog box, under **Export format**, select **CSV** (comma separate value) or **PDF** (portable document format).

RightFax Advanced Audit Report

The report shows an audit trail of additions, deletions, and modifications to user and group accounts and to delegates. You can also run the report for login and logout actions.

Data included

For each change of a user, group, or delegate:

- Date and time of the action
- Name of the user performing the action
- Action taken (added, deleted, or modified)
- Type of object modified (user, group, or delegate)
- Name of object modified (user, group, or delegate name)

For each login or logout action:

- Date and time of the action.
- Name of the user performing the action.
- Action (Login) and Corollary Action (LogOut, AdminLogOut). AdminLogOut appears if the connection was removed from the list of connections in Web Admin, and the user has not since signed off.
- Date and time of the corollary action.

To generate the Advanced Audit Report

1. Select **Advanced Audit**.
2. Specify the parameters user, date range, actions, objects, values, and log out action.

RightFax Deleted Inbound Faxes

Data included

For each day:

- Fax handle of the received fax, as assigned by the fax server
- Date and time the fax was received
- Date and time the fax was deleted
- RightFax user ID of the person who deleted the fax
- RightFax user ID of the"owner" of the fax
- Age of each fax

Fax page count

- Total number of faxes deleted
- Average age of the faxes

To generate the RightFax Deleted Inbound Faxes Report

1. Select **Faxes Deleted to Trash Inbound**.
2. Specify the parameter date range.

RightFax Deleted Outbound Faxes

Data included

For each day:

- Fax handle of the sent fax, as assigned by the fax server
- Date and time the fax was sent
- Date and time the fax was deleted
- RightFax user ID of the person who deleted the fax
- RightFax user ID of the "owner" of the fax
- Age of each fax

Fax page count

- Total number of faxes deleted

- Average age of the faxes

To generate the RightFax Deleted Outbound Faxes Report

1. Select **Faxes Deleted to Trash Outbound**.

2. Specify the parameter date range.

Failed Received Fax Report: Unsuccessful Inbound Faxes by User

Data included

For each RightFax user ID:

- Unique ID of the received fax, as assigned by the fax server.

- Date and time the fax was attempted.

- Status of the fax (viewed or printed).

- DID number the fax was sent to.

- Name or telephone number of the sending fax machine (remote ID).

- Status of the fax transmission.

- Number of pages in the attempted transmission.

- Length of time of the attempted transmission.

Fax page count

- Total number of failed pages per user.

- Overall total number of failed pages for all users.

To generate the Received Fax Report: Inbound Faxes by User

1. Select **Automation Inbound Failed User**.

2. Specify the parameter date range.

Received Fax Report: Inbound Faxes by Day

Data included

For each day:

- RightFax user ID.

- Date and time the fax was received.

- Status of the fax (viewed or printed).

- DID number that the fax was sent to.

- Name or telephone number of the sending fax machine (remote ID).

- Status of the fax transmission.

- Number of pages in the fax.

- Length of time of the transmission.

Fax page count

- The total number of pages received for the day.

- The overall total number of pages received for all users.

To generate the Received Fax Report: Inbound Faxes by Day

1. Select **Automation Inbound Day**.

2. Specify the parameter date range.

Received Fax Report: Inbound Faxes by Remote ID

Data included

For each sending fax machine:

- Name or telephone number of the sending fax machine (remote ID).

- RightFax user ID of the user who received the fax.

- Date and time the fax was received.
- Status of the fax (viewed or printed).
- DID number that the fax was sent to.
- Status of the fax transmission.
- Number of pages in the fax.
- Length of time of the transmission.
- Overall total number of fax pages received by the user.

Fax page count

- The total number of pages received for each sending fax machine.
- The overall total number of pages received.

To generate the Received Fax Report: Inbound Faxes by Remote ID

1. Select **Automation Inbound Remote ID**.
2. Specify the parameter date range.

Received Fax Report: Inbound Faxes by User

Data included

For each RightFax user ID:

- Unique ID of the received fax, as assigned by the fax server.
- Date and time the fax was received.
- Status of the fax (viewed or printed).
- DID number the fax was sent to.
- Name or telephone number of the sending fax machine (remote ID).
- Status of the fax transmission.

- Number of pages in the fax.
- Length of time of the transmission.

Fax page count

- Total number of pages received by each user.
- Overall total number of pages received by all users.

To generate the Received Fax Report: Inbound Faxes by User

1. Select **Automation Inbound User**.
2. Specify the parameter date range.

Sent Fax Report: Outbound Faxes by Day

Data included

For each day:

- Unique ID of the sent fax, as assigned by the fax server.
- Date and time the fax was sent.
- Date and time the fax was transmitted.
- RightFax user ID of the person who sent the fax.
- Name of the recipient.
- Name of the recipient company.
- Fax number of the recipient.
- Name or telephone number of the recipient fax machine (remote ID).
- Status of the fax transmission.
- Number of pages in the fax.
- Length of time of the transmission.

Fax page count

- Total number of pages sent for each user.

- Overall total number of pages sent.

To generate the Sent Fax Report: Outbound Faxes by Day

1. Select **Automation Outbound Day**.

2. Specify the parameter date range.

Failed Fax Report: Unsuccessful Outbound Faxes by User

Data included

For each sent fax that failed in transmission:

- RightFax user ID of the person who attempted to send the fax.

- Unique ID of the fax, as assigned by the fax server.

- The initial date and time that the server attempted to send the fax.

- The final date and time that the server attempted to send the fax.

- Name of the recipient.

- Name of the recipient company.

- Fax number of the recipient.

- Name or phone number of the recipient fax machine (remote ID).

- Status of the fax transmission.

- Length of time of the attempted transmission.

Fax page count

- Total number of pages sent for each user.

- Overall total number of pages sent.

To generate the Failed Fax Report Unsuccessful Outbound Faxes by User

1. Select **Automation Outbound Failed User**.

2. Specify the parameter date range.

Fax Report: Outbound Faxes by Unique ID

Data included

For each sent fax:

- Unique ID of the sent fax, as assigned by the fax server.

- Date and time the fax was sent.

- Date and time the fax was transmitted.

- RightFax user ID of the person who sent the fax.

- Name of the recipient.

- Name of the recipient company.

- Fax number of the recipient.

- Name or telephone number of the recipient fax machine (remote ID).

- Status of the fax transmission.

- Number of pages in the fax.

- Length of time of the transmission.

Fax page count

- Overall total number of pages sent.

To generate the Fax Report: Outbound Faxes by Unique ID

1. Select **Outbound Unique ID**.

2. Specify the parameter date range.

Fax Report: Outbound Faxes by User

Data included

For each RightFax user:

- RightFax user ID of the person who sent the fax.
- Unique ID of the sent fax, as assigned by the fax server.
- Date and time the fax was sent.
- Date and time the fax was received by the recipient.
- Name of the recipient.
- Name of the recipient company.
- Fax number of the recipient.
- Name or telephone number of the recipient fax machine (remote ID).
- Status of the fax transmission.
- Number of pages in the fax.
- Length of time of the transmission.

Fax page count

- Total number of pages sent for each user.
- Overall total number of pages sent.

To generate the Fax Report: Outbound Faxes by User

1. Select **Automation Outbound User**.
2. Specify the parameter date range.

Detailed Billing Report - Billing Code 1: Outbound Faxes Only

RightFax supports the use of two billing codes for each faxed document. This detailed report lists outbound faxes sorted by billing

code 1. Unless a custom field name has been defined, billing code 1 appears as Account.

Data included

For each fax:

- Date the fax was sent.
- Number of pages in the fax.
- Name of the recipient.
- Fax number of the recipient.
- Caller Subscriber Identification (CSID) from the recipient fax machine.
- RightFax user ID of the person who sent the fax.

Fax page count

- The overall total number of pages sent.

To generate the Detailed Billing Report - Billing Code 1: Outbound Faxes Only

1. Select **Billing Detailed Billing Code 1**.
2. Specify the parameter date range.

Detailed Billing Report - Billing Code 1 and Billing Code 2: Outbound Faxes Only

RightFax supports the use of two billing codes for each faxed document. This detailed report lists outbound faxes sorted by billing codes 1 and 2. Unless custom field names have been defined, billing code 1 appears as Account and billing code 2 as Matter.

Data included

For each fax:

- Date the fax was sent.

- Number of pages in the fax.

- Name of the recipient.

- Fax number of the recipient.

- Caller Subscriber Identification (CSID) from the recipient fax machine.

- RightFax user ID of the person who sent the fax.

Fax page count

- The overall total number of pages sent.

To generate the Detailed Billing Report - Billing Code 1 and Billing Code 2: Outbound Faxes Only

1. Select **Billing Detailed Billing Code 1 Billing Code 2**.

2. Specify the parameter date range.

Detailed Billing Report - Billing Code 2: Outbound Faxes Only

RightFax supports the use of two billing codes for each faxed document. This detailed report lists outbound faxes sorted by billing code 2. Unless a custom field name has been defined, billing code 2 appears as Matter.

Data included
For each fax:

- Date the fax was sent.

- Number of pages in the fax.

- Name of the recipient.

- Fax number of the recipient.

- Caller Subscriber Identification (CSID) from the recipient fax machine.

- RightFax user ID of the person who sent the fax.

Fax page count

- The overall total number of pages sent.

To generate the Detailed Billing Report - Billing Code 2: Outbound Faxes Only

1. Select **Billing Detailed Billing Code 2**.

2. Specify the parameter date range.

Summary Billing Report - Billing Code 1: Outbound Faxes Only

RightFax supports the use of two billing codes for each faxed document. This report shows a summary of outbound faxes sorted by billing code 1. Unless a custom field name has been defined, billing code 1 appears as Account.

Data included
For each billing code 1:

- Number of pages.

- Elapsed time .

For all billing codes 1:

- Number of pages.

- Elapsed time.

Fax page count

- The overall total number of pages and elapsed time.

To generate the Summary Billing Report - Billing Code 1: Outbound Faxes Only

1. Select **Billing Summary Billing Code 1**.

2. Specify the parameter date range.

Summary Billing Report - Billing Code 1 and Billing Code 2: Outbound Faxes Only

RightFax supports the use of two billing codes for each faxed document. This report shows a summary of outbound faxes sorted by billing codes 1 and 2. Unless custom field names have been defined, billing code 1 appears as Account and billing code 2 as Matter.

Data included

For each and all billing codes 1 and 2:

- Number of pages.
- Elapsed time .

For all billing codes 1 and 2:

- Number of pages.
- Elapsed time.

Fax page count

- The overall total number of pages and elapsed time.

To generate the Summary Billing Report - BillingCode 1 and Billing Code 2: Outbound Faxes Only

1. Select **Billing Summary Billing Code 1 Billing Code 2**.

2. Specify the parameter date range.

Summary Billing Report - Billing Code 2: Outbound Faxes Only

RightFax supports the use of two billing codes for each faxed document. This report shows a summary of outbound faxes sorted by billing code 2 Unless a custom field name has been defined, billing code 2 appears as Matter.

Data included

For each billing code 2:

- Number of pages.
- Elapsed time .

For all billing codes 2:

- Number of pages.
- Elapsed time .

Fax page count

- The overall total number of pages and elapsed time.

To generate the Summary Billing Report - Billing Code 2: Outbound Faxes Only

1. Select **Billing Summary Billing Code 2**.

2. Specify the parameter date range.

Channel Usage Report: by Day

The detailed report lists the usage of the fax channels on each board server for each day of the reporting period.

Data included

For each fax channel:

- Total minutes.

- Receive minutes.

- Send minutes.

- Utilization percentage.

For each DocTransport:

- Total minutes.

- Total receive minutes.

- Total send minutes.

For all DocTransports for each day:

- Overall total minutes.

- Overall total receive minutes.

- Overall total send minutes.

For all DocTransports and all days in the reporting period:

- Overall total minutes.

- Overall total receive minutes.

- Overall total send minutes.

To generate the Channel Usage Report: by Day

1. Select **Channel Usage**.

2. Specify the parameter date range.

Channel Usage Summary Report

The summary report lists the usage of the fax channels on each board server.

Data included
For each fax channel:

- Total minutes.

- Receive minutes.

- Send minutes.

- Utilization percentage.

For each board server:

- Total minutes.

- Total receive minutes.

- Total send minutes.

For all board servers:

- Overall total minutes.

- Overall total receive minutes.

- Overall total send minutes.

To generate the Channel Usage Summary Report

1. Select **Channel Usage Summary**.

2. Specify the parameter date range.

RightFax Conversion Error Report

Data included
For each sent fax that failed to convert:

- The initial date and time that the server attempted to convert the fax.

- Unique ID of the fax, as assigned by the fax server.

- RightFax user ID of the person who attempted to send the fax.

- Error message.

To generate the Conversion Error Report

1. Select **Conversion Errors**.

2. Specify the parameter date range.

Delegates by User

Data included

For each RightFax user ID:

- The users to which this user has granted delegate permissions.

- The groups to which this user has granted delegate permissions.

To generate the Delegates by User report

1. Select **Delegates by User**.

2. Specify the parameter user.

Destination Report: Outbound Faxes by Fax Number

This report lists faxes sent to a specific fax number.

Data included

For each fax number:

- RightFax user ID of the person who sent the fax.

- The user group of the user.

- Date the fax was sent.

- Name of the recipient.

- Name of the recipient company.

- Fax number of the recipient.

- Name or telephone number of the recipient fax machine (remote ID).

- Status of the fax.

- Number of pages in the fax.

- Unique ID of the fax, as assigned by the fax server.

Fax page count

- The overall total number of pages sent.

To generate the Destination Report: Outbound Faxes by Fax Number

1. Select **Destination Fax Number**.

2. Specify the parameters destination and date range.

Destination Report: Outbound Faxes by Remote ID

This report lists faxes sent to a specific recipient fax machine.

Data included

For each fax machine:

- RightFax user ID of the person who sent the fax.

- The user group of the user.

- Date the fax was sent.

- Name of the recipient.

- Name of the recipient company.

- Fax number of the recipient.

- Name or telephone number of the recipient fax machine (remote ID).

- Status of the fax.

- Number of pages in the fax.

- Unique ID of the fax, as assigned by the fax server.

Fax page count

- The overall total number of pages sent.

To generate the Destination Report: Outbound Faxes by Remote ID

1. Select **Destination Remote ID**.

2. Specify the parameters destination and date range.

Destination Report: Outbound Faxes by To-Company

This report lists faxes sent to a specific recipient company.

Data included

For each company:

- RightFax user ID of the person who sent the fax.

- The user group of he user.

- Date the fax was sent.

- Name of the recipient.

- Name of the recipient company.

- Fax number of the recipient.

- Name or telephone number of the recipient fax machine (remote ID).

- Status of the fax.

- Number of pages in the fax.

- Unique ID of the fax, as assigned by the fax server.

Fax page count

- The overall total number of pages sent.

To generate the Destination Report: Outbound Faxes by To-Company

1. Open **Destination_ToCompany.rpt**.Select **Destination To Company**.

2. Specify the parameters destination and date range.

Destination Report: Outbound Faxes by To-Name

This report lists faxes sent to a specific recipient.

Data included

The report shows for each recipient:

- RightFax user ID of the person who sent the fax.

- The user group of the user.

- Date the fax was sent.

- Name of the recipient.

- Name of the recipient company.

- Fax number of the recipient.

- Name or telephone number of the recipient fax machine (remote ID).

- Status of the fax.

- Number of pages in the fax.

- Unique ID of the fax, as assigned by the fax server.

Fax page count

- The overall total number of pages sent.

To generate the Destination Report: Outbound Faxes by To-Name

1. Open **Destination_ToName.rpt**.Select **Destination To Name**.

2. Specify the parameters destination and date range.

Failed Login Report

Lists the failed login attempts by user.

Data included

- Date of login.

- Time of login.

- RightFax user ID of the person who attempted to log in.

- Client application.

- Count of successive failed attempts.

To generate the Failed Login Report

1. Select **Failed Logins**.

2. Specify the parameters user and date range.

Fax Inactivity by User with Delegates

Data included

For each user with delegates:

- Date of last login

- User ID

- For each user ID: delegate count and list, delegator count and list

- User name

- Number of days inactive

To generate the Fax Inactivity report

1. Select **Fax Inactivity User**.

2. Specify the number of elapsed days since the last login.

Fax Printing Report: Faxes Printed by Group(s)

Lists the faxes that have been printed in order by group.

Data included

- Event date

- Printer ID

- Pages

- Copies

- Print time

- Notes

To generate the Fax Printing Report: Faxes Printed by Group(s)

1. Select **Fax Printing Group**.

2. Specify the parameters groups on which to report and date range.

Fax Printing Report: Faxes Printed by User(s)

Lists the faxes that have been printed in order by user.

Data included

- Event date

- Printer ID

- Pages

- Copies

- Print time
- Notes

To generate the Fax Printing Report: Faxes Printed by User(s)

1. Select **Fax Printing User**.
2. Specify the parameters destination and date range.

User History Report: All Outbound Faxes for User(s)

This report lists the details of all faxes. The report requires datareader and execute SQL permissions.

Data included

For each RightFax user ID:

- Date and time the fax was sent.
- RightFax user ID of the person who sent the fax.
- Name of the recipient.
- Name of the recipient company.
- Fax number of the recipient.
- Estimated cost based on transmission time and standard rates.
- Status of the fax transmission
- Number of pages in the fax.
- Length of time of the transmission.
- Transmission history, which consists of:
  - event date and time
  - off hook time

- Name or telephone number of the recipient fax machine (remote ID).

- Fax channel used for the transmission
- Number of pages transmitted
- Board result

Fax page count

- Total pages faxed and cost for the user

To generate the User History Report: All Outbound Faxes for User(s)

1. Select **Fax Lists Detailed All Faxes**.
2. Specify the parameters users, cost per minute, and date range.

User History Report: Completed Outbound Faxes for User(s)

This report lists the details of all completed faxes.

Required SQL permission

- datareader
- execute

Data included

For each RightFax user ID:

- Date and time the fax was sent
- RightFax user ID of the person who sent the fax
- Name of the recipient
- Name of the recipient company
- Fax number of the recipient.
- Estimated cost based on transmission time and standard rates

- Status of the fax transmission
- Number of pages in the fax
- Length of time of the transmission
- Transmission history, which consists of:
  - event date and time
  - off hook time

- Name or telephone number of the recipient fax machine (remote ID)
- Fax channel used for the transmission
- Number of pages transmitted
- Board result

Fax page count

- Total number of pages and total costs for each user

To generate the User History Report: Completed Outbound Faxes for User(s)

1. Select **Fax Lists Detailed Completed Faxes**.
2. Specify the parameters user, cost per minute, and date range.

User Fax Report: Outbound Summary of All Faxes for User(s)

This report lists all faxes that the fax server attempted to send.

Data included

For each fax:

- Date and time the fax was sent.
- RightFax user ID of the person who sent the fax.
- Name of the recipient.

- Name of the recipient company.
- Fax number of the recipient.
- Name or telephone number of the recipient fax machine (remote ID).
- Status of the fax transmission.
- Number of pages in the fax.
- Length of time of the transmission.

Fax page count

- The overall total number of pages sent.

To generate the User Fax Report: Outbound Summary of All Faxes for User(s)

1. Select **Fax Lists Summary All Faxes**.
2. Specify the parameters user and date range.

User Fax Report: Outbound Summary of Completed Faxes for User(s)

This report lists all faxes that were successfully sent.

Data included

For each fax:

- Date and time the fax was sent.
- RightFax user ID of the person who sent the fax
- Name of the recipient
- Name of the recipient company
- Fax number of the recipient
- Name or telephone number of the recipient fax machine (remote ID)
- Status of the fax transmission

- Number of pages in the fax

- Length of time of the transmission

Fax page count

- The overall total number of pages sent

To generate the User Fax Report: Outbound Summary of Completed Faxes for User(s)

1. Select **Fax Lists Summary Completed Faxes**.

2. Specify the report parameters destination and date range.

User Routed Received Documents Report: Activities on Received Documents Performed by User(s)

This report lists activities that users performed on received documents (such as viewing or forwarding).

Data included

For each activity:

- Date and time of the action

- RightFax user ID of the person who owns the fax

- Operation (the action performed)

- Fax number or remote ID of recipient

- Status of fax document

- Unique ID of fax document

To generate the User Routed Received Documents Report: Activities on Received Documents Performed by User(s)

1. Select **Fax Lists Summary Human Routed Received**.

2. Specify the parameters user and date range.

Documents Received report

This reports returns the number of documents received for the selected users and time frame. This number appears at the top of the report.

To generate the Documents Received report

1. Select **Fax Lists Summary Human Routed Received - Received Count**.

2. Specify the parameters user and date range.

Received documents sent to post fax processing report

This report returns a count of the number of documents received for the selected users and time frame that were sent for post fax processing by RightFax Vault or XML Generator. This number appears at the top of the report below the Documents Received total.

To generate the Received Documents sent to Post Fax Processing report

1. Select **Fax Lists Summary Human Routed Received - EDC Count**.

2. Specify the parameters user and date range.

Time-of-Day Usage by Group - Inbound

Data included

For each RightFax group:

- The time of day
- The number of pages
- The minutes elapsed

Fax page count

- The number of pages sent for each group on the specified day
- The overall total number of pages sent for all groups on the specified day

To generate the Time-of-Day Usage by Group - Inbound report

1. Select **Group Fax Usage Inbound**.
2. Specify the parameter date.

Time-of-Day Usage by Group - Outbound

Data included

For each RightFax group:

- The time of day
- The number of pages
- The number of minutes the fax took to send

Fax page count

- Total number of pages sent for each group on the specified day
- Overall total number of pages sent on the specified day

To generate the Time-of-Day Usage by Group - Outbound report

1. Select **Group Fax Usage Outbound**.
2. Specify the parameter date.

User History Report: All Outbound Activities for User(s)

This report shows all outbound activities for selected users for all faxes, including deleted faxes. The fax information appears sorted by user. The report requires execute SQL permission in addition to datareader permission.

Data included

For each fax:

- Date and time the fax was sent
- RightFax user ID of the person who sent the fax
- Name of the recipient
- Fax number of the recipient
- Estimated cost per minute
- Status of the fax transmission
- Number of pages in the fax
- Length of time of the transmission
- Total off-hook time for this fax
- Transmission History for each transmission attempt:
  - Event date and time
  - Remote ID of recipient device
  - Pages transmitted
  - Off-hook time
  - RightFax server name/Channel number
  - Board result: call status from fax board

Fax page count

- Total number of pages with estimated cost for each user

To generate the User History Report: All Outbound Activities for User(s)

1. Select **Outbound Activities Users**.

2. Specify the parameters user, cost per minute, and date range.

User History Report: Completed Outbound Activities for User(s)

This report shows all outbound activities for selected users for completed faxes only, including deleted faxes. The information is sorted by user. The report requires execute SQL permission in addition to datareader permission.

Data included
For each fax:

- Date and time the fax was sent

- RightFax user ID of the person who sent the fax

- Name of the recipient

- Fax number of the recipient

- Estimated cost per minute

- Status of the fax transmission

- Number of pages in the fax

- Length of time of the transmission

- Total off-hook time for this fax

- Transmission history for each transmission attempt:

  - Event date and time

  - Remote ID of recipient device

- Pages transmitted

- Off-hook time

- RightFax server name and channel number

- Board result: call status from the fax board

Fax page count

- Total number of pages with estimated costs for each user

To generate the User History Report: Completed Outbound Activities for User(s)

1. Select **Outbound Completed Activities Users**.

2. Specify the parameters user, cost per minute, and date range.

Permissions by User

Data included
For each RightFax user:

- A list of the permissions granted to this user

To generate the Permissions by User report

1. Select **Permissions by User**.

2. Specify the parameter user.

Fax Printing Report

Data included
For each system printer (and local printer, if selected in parameters):

- Printer ID (if a local printer, the printer ID will be Local User Printers)

- RightFax user ID for each user of the printer

- Printer use method

- Number of uses (number of times each print method was logged for the user)

To generate the Fax Printing Report

1. Select **Printer Usage**.

2. To include local and system printers in the report, select **Include local user printers**. These printers will be listed after all system printers.

Time-of-Day Inbound Faxes Channel Usage Report

This report shows the total number of minutes used by all inbound channels for each hour of the day, and calculates a utilization percentage for both a hypothetical number of receiving channels and for the actual number of inbound channels used.

Example You have a 16 channel board server that on a given day receives faxes for 120 minutes in the hour between noon and one pm. To find out the percentage of capacity if this volume had occurred across only 4 channels, run the report for 4 receive-capable channels. The resulting report would show the actual minutes (120), a utilization of 50% on 4 channels, and the actual utilization of 12.5% across all 16 channels. If you ran the report for 1 receive-capable channel, the utilization percentage column would show 200% capacity. One channel can only receive for 60 minutes each hour and the actual volume was 120 minutes.

Data included

For each hour:

- Minutes elapsed. If the date range spans more than one day, this will reflect a total of the reception time for all days for each hour (not an average).

- Percentage of capacity for entered number of channels.

- Percentage of capacity for the actual number of channels.

For all channels:

- The grand total number of minutes

The channel numbers that were actually used during the specified date range.

To generate the Time-of-Day Inbound Faxes Channel Usage Report

1. Select **Time of Day Inbound**.

2. Specify the parameters the number of receive-capable channels and date range.

Time-of-Day Outbound Faxes Channel Usage Report

This report shows the total number of minutes used by all outbound channels for each hour of the day, and calculates a utilization percentage for both a hypothetical number of sending channels and for the actual number of outbound channels used.

Example A 16 channel board server sends faxes for 120 minutes in the hour between noon and one pm on a given day. To find out the percentage of capacity if this volume had occurred across only 4 channels, run the report using "4" for the Send-Capable Channels field. The resulting report would show the actual minutes (120), a utilization of 50% on 4 channels, and the actual utilization of 12.5% across all 16 channels. If you entered "1" for the Send-Capable Channels field, the utilization percentage column would show a 200% capacity. One channel can only transmit for 60 minutes each hour and the actual volume was 120 minutes.

Data included

For each hour:

- Minutes elapsed. If the date range spans more than one day, this will reflect a total of the transmission time for all days for each hour (not an average).

- Percentage of capacity for entered number of channels.

- Percentage of capacity for the actual number of channels.

For all channels:

- The grand total number of minutes

The channel numbers that were actually used during the specified date range.

To generate the Time-of-Day Outbound Faxes Channel Usage Report

1. Select **Time of Day Outbound**.

2. Specify the parameters the number of receive-capable channels and date range.

Time-of-Day Usage Report Outbound Faxes

This report shows the total number of minutes used by all outbound channels for each hour of the day, and calculates a utilization percentage for both a hypothetical number of sending channels and for the actual number of outbound channels used.

Example A 16 channel board server sends faxes for 120 minutes in the hour between noon and one pm on a given day. To find out the percentage of capacity if this volume had occurred across only 4 channels, run the report using "4" for the Send-Capable Channels field. The resulting report would show the actual minutes (120), a utilization of 50% on 4 channels, and the actual utilization of 12.5% across all 16 channels. If you entered "1" for the Send-Capable Channels field, the utilization percentage column would show a 200% capacity. One channel can only transmit for 60 minutes each hour and the actual volume was 120 minutes.

Data included

For each hour:

- Minutes elapsed. If the date range spans more than one day, this will reflect a total of the transmission time for all days for each hour (not an average).

- Percentage of capacity for entered number of channels.

- Percentage of capacity for the actual number of channels.

For all channels:

- The grand total number of minutes.

The channel numbers that were actually used during the specified date range.

To generate the Time-of-Day Usage Report Outbound Faxes

1. Select **Time of Day Usage**.

2. Specify the parameters the number of receive-capable channels and date range.

Inbound Fax Users by Transmission Time

Data included

For each RightFax user ID:

- Date

- Number of minutes of transmission time for the user's received faxes that day

- Total number of minutes of transmission time for the user's received faxes for all days

For all users:

- The overall number of minutes of transmission receipt time

To generate the Inbound Fax Users by Transmission Time report

1. Select **Usage Inbound Transmission Time**.

2. Specify the parameter date range.

Inbound Fax Use by Pages

Data included

For each RightFax user ID:

- Date

- Number of pages received that day

- Total number of pages received for all days

Fax page count

- The overall total pages received for all users

To generate the Inbound Fax Use by Pages report

1. Select **Usage Inbound Users**.

2. Specify the parameter date range.

Outbound Fax Users by Transmission Time

Data included

For each RightFax user ID:

- Date

- Number of minutes of transmission time for the user's sent faxes that day

- Total number of minutes of transmission time for the user's sent faxes for all days

For all users:

- The overall number of minutes of transmission time for sent faxes

To generate the Outbound Fax Users by Transmission Time report

1. Select **Usage Outbound Transmission Time**.

2. Specify the parameter date range.

Outbound Fax Use by Pages

Data included

For each RightFax user ID:

- Date

- Number of pages sent that day

- Total number of pages sent for all days

Fax page count

- Overall total number of pages sent for all users

To generate the Outbound Fax Use by Pages report

1. Select **Usage Outbound Users**.

2. Specify the parameter date range.

Server Inbound and Outbound Usage

Data included

For the server, for each group of users, and for each user ID:

- Total number of inbound pages

- Total number of outbound pages

- Total number of all pages

To generate the Server Inbound and Outbound Usage report

1. Select **Usage Server**.

2. Specify the parameter date range.

Top-10 Inbound Fax Users by Transmission Time

This report lists the 10 RightFax users whose received faxes used the most transmission time during the reporting period.

Data included

For each of the top 10 RightFax user IDs:

- Date

- Number of minutes of transmission time for the user's received faxes that day

- Total number of minutes of transmission time for all days

For all top 10 users:

- The overall number of minutes of transmission receipt time

- A bar chart of their transmission receipt times

To generate the Top-10 Inbound Fax Users by Transmission Time report

1. Select **Usage Top 10 Inbound Transmission Time**.

2. Specify the parameter date range.

Top-10 Inbound Fax Users by Pages

This report lists the 10 RightFax users who received the most faxes during the reporting period.

Data included

For each of the top 10 RightFax user IDs:

- Date

- Number of pages received that day

- Total number of pages received for all days

For all top 10 users:

- The overall total pages received by the top ten users

- A bar chart of their received faxes

To generate the Top-10 Inbound Fax Users by Pages report

1. Select **Usage Top 10 Inbound Users**.

2. Specify the parameter date range.

Top-10 Outbound Fax Users by Transmission Time

This report lists the 10 RightFax users whose sent faxes used the most transmission time during the reporting period.

Data included

For each of the top 10 RightFax user IDs:

- Date

- Number of minutes of transmission time for the user's sent faxes that day

- Total number of minutes of transmission time for all days

For all top 10 users:

- The overall number of minutes of transmission send time

- A bar chart of the transmission send times

To generate the Top-10 Outbound Fax Users by Transmission Time report

1. Select **Usage Top 10 Outbound Transmission Time**.

2. Specify the parameter date range.

Top 10 Outbound Fax Users by Pages

This report lists the 10 RightFax users who sent the most faxes during the reporting period.

Data included

For each of the top 10 RightFax user IDs:

- Date

- Number of pages sent that day

- Total number of pages sent for all days

For all top 10 users:

- The overall total pages sent by the top ten users

- A bar chart of their sent faxes

To generate the Top 10 Outbound Fax Users by Pages report

1. Select **Usage Top 10 Outbound Users**.

2. Specify the parameter date range.

User Inactivity

Data included

For each inactive user:

- Date of last login

- User ID

- User name

- Number of days inactive

To generate the User Inactivity report

1. Select **User Inactivity**.

2. Specify the elapsed number of days since the last login.

Chapter 16: Configuring FTP routing

With FTP (File Transfer Protocol) routing, faxes are routed from the RightFax server to an FTP site.

Configuring RightFax for FTP routing

Configuring FTP routing includes the following tasks:

- Configure a connection to the FTP site.

- Configure users for FTP routing.

To configure a connection to an FTP site

1. In Web Admin, click **External Connections**. The list of connections appears in the right pane.

2. Click **New**. The **New External Connection** dialog box opens. See *Configuring an FTP connection* on page 100.

To configure users for FTP routing

1. In Web Admin, click **Users**. The list of users appears in the right pane.

2. Select a user in the list, and then click **Edit**. The **Edit User** dialog box opens.

3. Under **Routing**, in the **Enter routing code box**, enter the user's fax number.

4. In the **Routing type** list, select **FTP**.

5. In the **External connection** list, select the network connection for the FTP site. If you have not configured a connection to an FTP site, click **New** and see *Configuring an FTP connection* on page 100.

6. In the **File format** list, select the file format for the faxes. For more information, see *Routing* on page 25.

7. In the **Routing info** box, enter the path to the folder on the FTP site. You have the option to use the following macros for the path.

Macro	Definition
~1	Date (YYYYMMDD)
~2	Day of the week (SUN-SAT)
~3	Month (JAN-DEC)
~4	Year (YYYY)
~5	Day of the month (DD)
~6	Month as decimal (01–12)
~7	User ID (up to 12 characters in 8.3 FAT format)
~8	Week as decimal (00–51)
~9	Billing Code #1 (up to 12 characters in 8.3 FAT format)
~0	Billing Code #2 (up to 12 characters in 8.3 FAT format)

Macro	Definition
~A	Remote ID (left to right, up to 12 characters in 8.3 FAT format)
~B	Remote ID (right to left, up to 12 characters in 8.3 FAT format)
~C	Group ID (up to 12 characters in 8.3 FAT format)
~D	ANI (up to 12 characters in 8.3 FAT format)
~E	Channel
~F	Name of the fax server
~G	Receive time hour (00-23)
~H	Receive time minutes
~I	Receive time seconds
~J	Unique ID of the fax

Macro	Definition
~7	User ID (up to 12 characters in 8.3 FAT format)
~8	Week as decimal (00–51)
~9	Billing Code #1 (up to 12 characters in 8.3 FAT format)
~0	Billing Code #2 (up to 12 characters in 8.3 FAT format)
~A	Remote ID (left to right, up to 12 characters in 8.3 FAT format)
~B	Remote ID (right to left, up to 12 characters in 8.3 FAT format)
~C	Group ID (up to 12 characters in 8.3 FAT format)
~D	ANI (up to 12 characters in 8.3 FAT format)
~E	Channel
~F	Name of the fax server
~G	Receive time hour (00-23)
~H	Receive time minutes
~I	Receive time seconds
~J	Unique ID of the fax

8. In the **Routing filename format** box, you have the option to define the format of the file name for each fax that is routed. Include one or more of the following macros in the path, and RightFax will dynamically name the files with the date, day of the week, user ID, etc. To ensure that file names are unique, it is recommended that you include the unique ID of the fax or a combination of macros that ensures that each file name is unique.

9. Click **OK**.

Macro	Definition
~1	Date (YYYYMMDD)
~2	Day of the week (SUN-SAT)
~3	Month (JAN-DEC)
~4	Year (YYYY)
~5	Day of the month (DD)
~6	Month as decimal (01–12)

Chapter 17: Registering RightFax on MFPs

You must register RightFax on each MFP that you will use with the RightFax server. Registering detects the type of MFP and adds the appropriate RightFax interface to the device. Registering requires that you know the IP address of the MFP.

For more information about using an MFP with RightFax, see the RightFax Connector Administrator Guide for the MFP.

Step 1: Defining global MFP settings

Before adding MFPs, you must specify global settings that will apply to all MFPs that you add.

To define general MFP settings

1. In Web Admin, in the left pane, click **MFPs**.

2. In the right pane, click **Global MFP Settings**, and then click the **General** tab.

3. Enter the **RightFax server address**.

4. To use TLS/SSL for the MFP app, select the **Connect securely** check box. Use this only if you have installed a certificate on the device. For information, see the documentation for your MFP.

5. Defaults for notifications for users about the status of faxes that are sent from MFPs can be configured under **Notification Defaults**.

- In the **Condition** list, select the status of the faxes for which users will be notified: **Success**, **Failure**, or **Success and failure**.

- Click **Print** to print a notification at the MFP.

- Click **Email** to send a notification to the email address of the user who logs in at the MFP. In the **Email address** box, enter the email address where notifications will be sent if a user doesn't have an email address.

6. Click **OK**.

Step 2: Adding MFPs

When you add an MFP, the RightFax server detects the MFP and registers RightFax on the device.

To add an MFP

1. In Web Admin, in the left pane, click **MFPs**.

2. In the right pane, click **New**.

3. Enter a **Description**, and in the **Network address** box, enter the IP address or network name of the MFP.

   If you use a non-standard port, append the port to the IP address separated by a colon. For example, *IP*:*port#*

4. Click **Detect**. The device type appears in the dialog box. The

device type determines which options are available when registering RightFax on the device.

5. If available, in the **Fax addressing restrictions** list, select **None** to not apply any addressing restrictions, **Confirm Fax Address** to require that users enter the recipient's fax number twice, or **Phonebook Only** to require that users select recipients from the phonebook.

6. If available, select a **Default paper size**.

7. If available, you can change the default **Guest user account** (WALKUP) to any RightFax user account. This account will be the guest user account for all users.

8. If you wish to designate this printer for automated network print functions, select the **Also add a server printer** check box.

9. Click **OK**. The device is added to the MFP list. If registration fails, the Registered column shows that the device is not registered.

To import MFPs from a .csv file

1. Create a .csv file. For each MFP, the file must include a line of text in the following format:

   Description,NetworkAddress,Username,Password,GuestUsername,AddressingType,Skip

   The variables are described in the following list:

   - **Description**. A description of the MFP.

   - **NetworkAddress**. The IP address of the MFP.

   - **Username**. The user name with administrative rights to the MFP. The user name will be used to install the RightFax software on the MFP.

   - **Password**. The password for the user name with administrative rights to the MFP.

- **GuestUsername**. The user ID for the guest user account. Typically this is WALKUP.

- **AddressingType**. Restrictions for users when they address faxes on the MFP.
  - Enter **None** or **0** for no addressing restrictions.
  - Enter **Confirm Fax Address** or **1** to require that users enter the recipient's fax number twice.
  - Enter **Phonebook Only** or **2** to require the user to select recipients from the phonebook.

- **Skip**.
  - Enter **True** or **1** to skip this MFP.
  - Enter **False** or **0** to install the MFP.

- **AddServerPrinter**. Designate this printer for automated network print functions.
  - Enter **True** or **1** to designate this printer for automated network print functions.
  - Enter **False** or **0** to if you do not wish to designate this printer for automated network print functions.

2. In Web Admin, in the list of items, click **MFPs**.

3. Click **Import**, and then click **Choose File**.

4. Find and select the .csv file, and then click **Import**.

5. To check the status of the device import task, on the *<username>* menu, click **View Task Monitor**. The Status column shows one of the following:
   - **In progress**. The task has not yet completed.
   - **Warning**. The process completed, but not all of the devices were successfully imported or created.

- **Error**. The tasks did not complete. The associated error message appears in the **Output** column.

- **Ok**. The task completed.

6. If the task completed, click **View** to check how many devices were created. If there were problems, a **Download** link appears in the **Output** column. Click the link to download a file containing detailed information for each device not created.

To delete and unregister an MFP

1. In Web Admin, in the left pane, click **MFPs**.

2. In the right pane, click the MFP in the list, click **Delete**, and click **OK** to confirm the deletion. This deletes the MFP from the list and attempts to remove the RightFax interface from the device.

   If the device is deleted from the list but the device could not be reached, then you must re-add the device in Web Admin and delete it again.

To edit an MFP

1. In Web Admin, in the left pane, click **MFPs**.

2. In the right pane, click the MFP in the list, and then click **Edit**.

3. Make any necessary changes.

   If you change the network address, the MFP is considered new. The license will be transferred to the MFP, and RightFax will be registered on the device.

4. Click **OK**.

Chapter 18: Adding external connections

Connections to external services are required for sending and receiving emails, sending SMS messages, and routing to an FTP site.

Adding an external connection

To add an external connection

1. In Web Admin in the left pane, click **External Connections**.

2. Click **New**. The **New External Connection** dialog box opens. See *Configuring external connection properties* below.

Configuring external connection properties
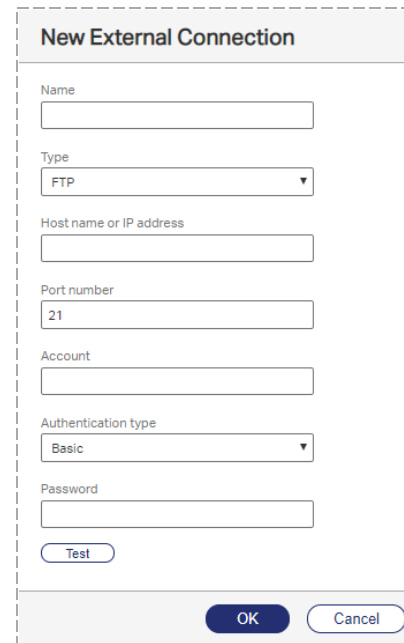
Each type of external connection you add requires different configuration settings.

Configuring an FTP connection

To configure a connection to an FTP site

1. Click **New**. The **New External Connection** dialog box opens.

2. In the **Name** box, enter a descriptive name for this connection.

3. In the **Type** box, select **FTP**, **FTP over FTP over SSL (FTPS)**,

or **SSH File Transfer Protocol (SFTP)**.

4. In the **Host name or IP address** box, enter the IP address or the name of the server that is hosting the FTP site.

5. In the **Port number** box, enter the port number.

6. In the **Account** and **Password** boxes, enter the user name and password for the FTP site.

7. For FTP over SSL (FTPS), under **Certificate**, click the ellipsis button, browse to the location of the security certificate, and select it.

8. To test the connection, click **Test**.

9. Click **OK**.

Configuring an SMTP connection

You can configure an SMTP connection with basic or OAuth authentication with the Client Credentials Flow.

To configure a connection to an SMTP email server for basic authentication

1. The **New External Connection** dialog box opens.

2. In the **Name** box, enter a descriptive name for this connection.

3. In the **Type** box, select **SMTP**. To send email messages with transport layer security (TLS), select **SMTP using TLS**.

4. In the **Host name or IP address** box, enter the IP address or the name of the SMTP server.

5. In the **Port number** box, enter the SMTP port number.

6. If an account is required by the SMTP server for basic

authentication, then in the **Account** and **Password** boxes, enter the account and password.

7. Under **Authentication type**, select **Basic**.

8. To test the connection, click **Test**.

9. Click **OK**.

To configure a connection to an SMTP email server for OAuth authentication

1. The **New External Connection** dialog box opens.

New External Connection

Name

Type

SMTP ▼

Host name or IP address

Port number

587

Account

Authentication type

OAuth ▼

Issuer

Client ID

Client secret
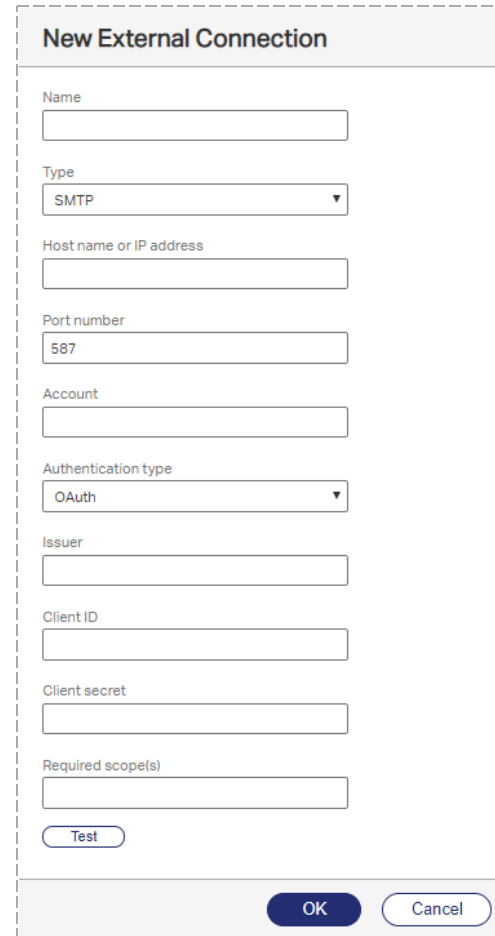
Required scope(s)

(Test)

OK   (Cancel)

2. In the **Name** box, enter a descriptive name for this connection.

3. In the **Type** box, select **SMTP**. To send email messages with

transport layer security (TLS), select **SMTP using TLS**.

4. In the **Host name or IP address** box, enter the IP address or the name of the SMTP server.

5. In the **Port number** box, enter the SMTP port number.

6. If an account is required by the SMTP server for OAuth authentication, then in the **Account** box, enter the account.

7. Under **Authentication type**, select **OAuth**.

8. In the **Issuer** box, enter the name of the authorization server that will issue the access token.

9. In the **Client ID** box, enter the client ID.

10. In the **Client secret** box, enter the client secret.

11. In the **Required scope(s)** box, enter the scope of access for the user account. To enter multiple scopes, separate each scope with a space as prescribed in the OAuth standards.

12. To test the connection, click **Test**.

13. Click **OK**.

Configuring a POP3 connection

You can configure an POP3 connection with basic or OAuth authentication with the Client Credentials Flow.

To configure a connection to a POP3 email server for basic authentication
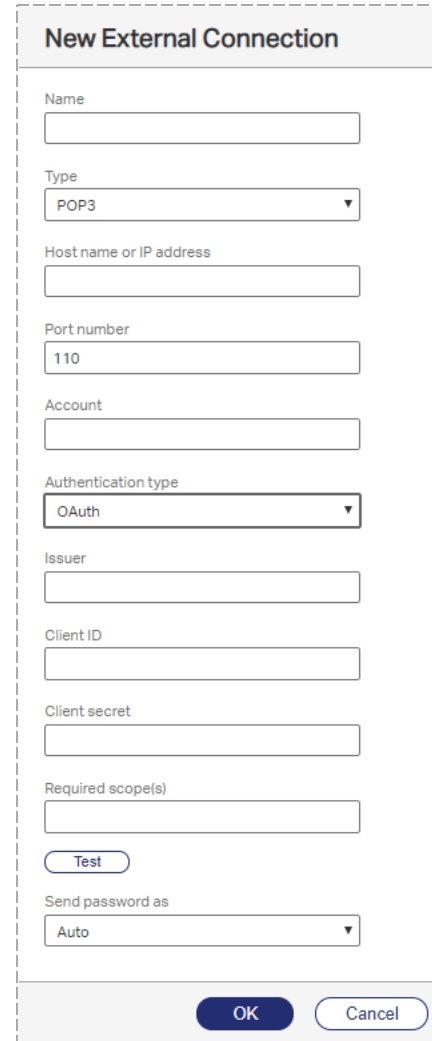
1. Click **New**. The **New External Connection** dialog box opens.

2. In the **Name** box, enter a descriptive name for this connection.

3. In the **Type** box, select **POP3** or **POP3 over SSL (POP3S)**.

4. In the **Host name or IP address** box, enter the IP address or the name of the POP server.

5. In the **Port number** box, enter the port number.

6. In the **Account** and **Password** boxes, enter the user name and password for the account on the POP server.

7. Under **Authentication Type**, select **Basic**.

8. If using POP3, under **Send passwords as**, select **Auto**, **Encrypted only (APOP)**, or **Clear text only**.

9. To test the connection, click **Test**.

10. Click **OK**.

To configure a connection to an POP3 email server for OAuth authentication

1. Click **New**. The **New External Connection** dialog box opens.

2. In the **Name** box, enter a descriptive name for this connection.

3. In the **Type** box, select **POP3** or **POP3 over SSL (POP3S)**.

4. In the **Host name or IP address** box, enter the IP address or the name of the POP server.

5. In the **Port number** box, enter the port number.

6. If an account is required by POP server for OAuth authentication, then in the **Account** box, enter the account.

7. Under **Authentication type**, select **OAuth**.

8. In the **Issuer** box, enter the name of the authorization server that will issue the access token.

9. In the **Client ID** box, enter the client ID.

10. In the **Client secret** box, enter the client secret.

11. In the **Required scope(s)** box, enter the scope of access for the user account. To enter multiple scopes, separate each scope with a space as prescribed in the OAuth standards.

12. If using POP3, under **Send passwords as**, select **Auto**, **Encrypted only (APOP)**, or **Clear text only**.

13. To test the connection, click **Test**.

14. Click **OK**.

Chapter 19: Creating dialing rules and Least-Cost Routing plans

When you use dialing rules you can precisely control outbound faxing by specifying rules and restrictions about how faxes are sent according to their destination fax numbers.

Example A dialing rule might specify that all faxes to a certain area code are sent via wide-area network (WAN) to another RightFax server, saving long-distance charges. Another dialing rule might specify that international faxes can only be sent at times of day when rates are lowest.

RightFax Least-Cost Routing (LCR) routes outbound faxes between RightFax Enterprise servers or RightFax Branch Office servers on a WAN to minimize long distance and other telephone charges. Least-Cost Routing includes dialing rules, load balancing, destination tables, InterConnect, and testing tools.

Creating, deleting, and copying dialing rules

Each dialing rule consists of the following parts:

- A number pattern of wildcard characters or a specific fax number. Outgoing faxes are checked if their destination fax numbers match this pattern or number.

- Rules and restrictions that will be applied if the destination fax number matches the pattern or number.

If one fax number matches multiple dialing rule patterns, the fax server weighs each rule according to how closely it matches the fax number, and then sends the fax according to the rule with the greatest weight.

Dialing rules are server-specific, allowing different rules for servers in different locations or serving groups with varying needs. If you have multiple RightFax servers, you can copy rules from one server to another. See the *RightFax Administrator Guide*.

To open dialing rules

- In Web Admin, click**Dialing Rules**. The list of dialing rules appears in the right pane of the window.

To add a new dialing rule

1. Click **New**. The **New Dialing Rule** page opens.

2. Complete the options, and then click **Ok**. See *Editing dialing rules* below.

To delete a dialing rule

- Select the rule or rules in the list, and click **Delete**. To confirm the deletion, click **Delete**.

Editing dialing rules

To edit the properties of an existing dialing rule

1. Select the dialing rule and click **Edit**. The **Edit Dialing Rule** page opens.

2. In the **Comment** box, enter a comment about the rule.

3. As needed click the heading of the section you want to edit.

To temporarily disable the rule

- Select the **Disable rule** check box.

To enable the rule

- Clear the **Disable rule** check box.

To share with other nodes

- To share the rule on all nodes of a Shared Services system, select the **Share with other nodes** check box. Shared rules are shown with "(Shared)" after the rule number. The rule can be edited on any server where it appears.

To give the rule extra weight

When a fax number matches two or more dialing rules, RightFax weighs each rule according to how closely it matches the dialed number and uses the rule with the highest weight. This setting adds extra weight to the rule so it can be selected over another rule that has a better pattern match.

Dialing rule pattern characters are weighted as follows:

- digit match (0–9) = 10 points

- + (plus) = 0 points

- ? (question mark) = 5 points

- ~ (tilde) = 4 points

Matching

The Matching settings determine to which faxes the dialing rule will be applied. The main match is based on the destination fax number pattern, and additional matching options are available.

Matching ⌃

Pattern

`+`

+ Matches zero or more digits (must be at end)
~ Matches zero or one digit
? Matches exactly one digit
%[tbl.#] Matches digits against destination table
N Matches any Fax Number list entry (must be the only character)

Priorities

☑ Applies to High priority faxes
☑ Applies to Normal priority faxes
☑ Applies to Low priority faxes

Fax Traffic Type

◉ Rule applies to all traffic
◯ Rule applies to Production traffic only
◯ Rule applies to Non-Production traffic only
◯ Rule applies to SMS traffic only

Minimum queue depth (in pages)

`0`

Minimum fax size (in pages)

`0`

Pattern

The destination fax number pattern or number that the dialing rule applies to. RightFax ignores any hyphens, parentheses, or spaces in the pattern string. The pattern can include the digits 0–9, as well as the pound [#] and asterisk [*] keys.

You can use wildcard characters to define variables in the number pattern and thereby specify a range of numbers that the rule will apply to. The following table lists each wildcard character that can be used in the **Pattern** box and its definition.

Wildcard	Definition	Examples	Weight
+	Matches zero or more digits; must always appear at the end of number string.	**+** matches any fax number entered. **415+** matches any number that begins with 415, including 415-555-7000, 415-4455, and 4151.	0 points
~	Matches zero or one digit; can be placed anywhere in the number string.	**~415+** matches any number beginning with 415 or [digit]415 including 415-555-7000, 415-3222, 1-415-555-7000, and 2415. **~~415+** matches 1-415-555-7000, 9-1-415-555-7000, and 415-555-7000.	4 points
?	Matches exactly one digit.	**415-555-7???** matches any number that starts with 415-555 and has its final four digits between 7000 and 7999. **415-???-????** matches any number within the area code 415.	5 points
% [tableID,#]	Matches digits defined in a destination table to the number of digits specified (see *Viewing destination tables* on page 116).	**415-%[EAST,3]+** matches all numbers that begin with 415 and have a three-digit prefix defined in the destination table "EAST."	
N	Matches entries in the fax number list. N must be the only entry.	**N** matches all fax numbers that have been added to the fax number list in EFM, regardless of whether they are assigned.	

Exact matches on the digits 0-9 have a weight of 10 points. Use of wildcard characters decreases the weight of a pattern match because wildcard character matching is always less specific than an exact match.

Example The fax number 520-555-7000 matches the patterns "520-555-700?" and "520+", but is always matched with the first rule because it is more specific.

Priorities

Matching based on priority can be useful when broadcasting faxes or other large volume faxing. It can also be useful for universal redirection of faxes (for example, to send all high priority faxes from Server2 instead of Server1).

Select the check boxes next to the priorities you want to match for this rule. Only faxes with the priority levels selected here will be considered for this rule.

Fax Traffic Type

Apply the dialing rule based on whether the fax or SMS was generated by the RightFax Integration Module for production faxing. You can restrict the rule to apply to:

- All traffic
- Production traffic only
- Non-production traffic only
- SMS traffic only

Minimum queue depth (in pages)

Specify the number of fax pages that must be waiting in the server's queue before this rule is considered. Use to define a dialing rule to offload outgoing fax traffic to another server when the load on the current server gets too high.

Minimum fax size (in pages)

Specify the minimum number of pages a fax must be before this rule is considered. Use to define a dialing rule to offload very large faxes to another server, leaving the local server free to send only smaller faxes.

Restrictions

You can restrict each dialing rule to specific servers, users, or groups in your organization.

Server Restrictions

All (Every)

The rule will be applied regardless of the origin of the fax.

Only These

The rule will be applied to the servers you enter in the **Servers** box. Enter one or more server name or names. Use commas to separate multiple entries.

All But These

The rule will be applied to all servers except those you enter in the **Servers** box. Use commas to separate multiple entries.

User Restrictions

All (Every)

The rule will be applied regardless of the origin of the fax.

Only these

The rule will be applied to the users you enter in the **Select users** box. You can select one or more user IDs. Enter user IDs by selecting the check boxes next to the IDs in the list.

All but these

The rule will be applied to all servers except those you enter in the **Select users** box. Enter one or more user IDs. Use commas to separate multiple entries. You can select one or more user IDs. Enter user IDs by selecting the check boxes next to the IDs in the list.

Group Restrictions

All (Every)

The rule will be applied regardless of the origin of the fax.

Only these

The rule will be applied to the users you enter in the **Select groups** box. You can select one or more group IDs. Enter group IDs by selecting the check boxes next to the IDs in the list.

All but these

The rule will be applied to all servers except those you enter in the **Select groups** box. You can select one or more group IDs. Enter group IDs by selecting the check boxes next to the IDs in the list.

Adjustments

The Adjustments settings determine how fax numbers that match the dialing rule can be modified to properly send from the specified

destination.

You can add or remove digits from the beginning or end of the destination fax number (for example, to automatically add a 1 to long distance calls or a 9 if necessary to get an outside line).

You can also add a user's international billing code or remove all but the last four digits of a number for internal routing.

> **Note** If your organization requires a dialing prefix for all outgoing calls (including all outgoing faxes), specify the prefix in the Global Transport Settings of DocTransport Configuration. See the *RightFax Administrator Guide*. Do **not** specify the prefix in the dialing rules.

You can append or prepend any combination of dialable digits. You can also include special dialing characters that have special meaning to RightFax.

Dialing characters supported by dialing rules

The following table lists the dialable characters and their definitions. Characters are not case-sensitive.

Character	Definition
0–9	Dialable phone digits.

Character	Definition
!	Hook-flash signal.
#	Pound button on phone.
*	Asterisk button on phone.
, (comma)	1-second pause (you can combine several of these characters to increase the length of the pause).
A	Replaced in the dial string by the fax's Billing Code 1 value.
B	Replaced in the dial string by the fax's Billing Code 2 value.
C	Replaced in the dial string by the fax's ToContactNum value (the recipient's voice number).
D	Replaced in the dial string by the fax's ToName value (the recipient's name). Any undialable characters in this field are discarded.
E	Replaced in the dial string by the fax's ToCompany value (the recipient's company name). Any undialable characters in this field are discarded.
F	Replaced in the dial string by the user's domestic long distance Auto Billing Code configured in DocTransport Configuration. See the *RightFax Administrator Guide*.
G	Replaced in the dial string by the user's international long distance Auto Billing Code configured in DocTransport Configuration. See the *RightFax Administrator Guide*.
I	5-second pause (you can combine several of these characters to increase the length of the pause).
P	Pulse dialing mode.
T	Tone dialing mode (default).
W	Wait up to 15 seconds for a dial tone.
{	Do not prepend the dialing prefix.
}	Do not append the dialing postfix.

Character	Definition
@	Required for SR140 FoIP numbers. Appends the IP address of the FoIP router.
&	Indicates that a sequence of DTMF digits will follow. This applies to post-dialing for in-band FoIP calls using an SR140,
	The post-dial string can include PSTN Telephony characters such as 0-9, #, *, and a comma, but not p, t, w, and !.
	The digits will be dialed as soon as the SR140 receives a SIP 183 or SIP 200 response code or a H323 message from the gateway.
	Note To use DTMF post dialing, the post_dialing_enable parameter must be enabled on the SR140.

Example For international calls, a dialing rule **001+wGii** (001=Pattern;wGii=Append) specifies that if the first three digits of an outgoing call are the international dialing prefix (pattern of **001+**), RightFax will wait for a dial tone (**w**), look up the user's international billing code to dial (**G**), and wait 10 seconds before dialing it (**ii**).

Example For post-dialing for in-band FoIP calls using an SR140, a dialing rule including **@172.17.9.225&5555** appended, specifies that if the gateway's IP address is **@172.17.9.225**, the SR140 will post-dial the digits 5555 as soon as one of the following has been received from the gateway: a SIP 183, SIP 200, or H.323 message.

Adjust fax priority

Enter **-2**, **-1**, **1**, or **2** to add or subtract priority points for all faxes that match the dialing rule pattern. Enter **0** to not change the priority. Priority is rated on a three-point scale: low priority <= 1, normal priority = 2, high priority >= 3.

Destination

The Destination settings determine where in your organization a fax matching the dialing rule pattern will be routed before the destination fax number is dialed.

Note Entries in the **name** boxes are limited to 47 characters. This means that you can enter fully qualified domain names that have 47 or fewer characters, including periods and backslashes. If the domain name is longer, use the IP address instead.

Send via fax server

Select this option to route the fax to any RightFax Enterprise or RightFax Branch Office server (including the local server) on your network. The new server evaluates the destination fax number against its own dialing rules and transmits or forwards the fax accordingly.

- After you select this option, in the **Server name** box, enter the destination server name to use for routing.

Note Take care not to create dialing rules on two or more servers that will cause a fax to loop between them. If this occurs, RightFax sends the fax after ten loops.

Receive into fax server

Select this option to route the fax to a RightFax Enterprise or RightFax Branch Office server (including the local server) on your network and deliver them as inbound faxes. You can use this option to define intra-office routing rules that let RightFax users in your organization send faxes to each other across different fax servers on the network.

If the fax number does not match a routing code on the receiving RightFax server, the fax is routed to the Default user ID on that server.

1. After you select this option, in the **Server name** box, enter the destination server name to use for routing.

2. To include a TTI line on the fax, select the **Insert TTI** check box. By default, faxes received into the fax server do not include a TTI line.

3. In the **Fax ID** box, specify the fax ID that should appear in the TTI line.

Send via transport

Select this option to select one of the transport methods that you added and configured in the RightFax DocTransport module as the fax destination, rather than a specific RightFax server. See the *RightFax Administrator Guide*.

After you select this option, select a transport method in the **Transport name** list. The transport must have been added in the DocTransport module. You can select from the following transport methods:

- **FOIP**. The fax will be transmitted packaged as an email message with a TIFF attachment via your SMTP server via fax over IP (FoIP).

   To specify the email address of the destination device, click **Adjustments**, strip all of the digits from the destination fax number, and then prepend the destination email address.

- **RFCONNECT**. The fax will be routed to RightFax Connect. RightFax Connect requires a ten-digit phone number. Depending on

your incoming digits, you may need to make changes under Adjustments.

- **SMS**. The fax will be routed to an SMS number. When a fax is sent to an SMS device, only the cover page notes are transmitted.

   To specify the destination SMS number, under Adjustments, strip all of the digits from the destination fax number, and then prepend the desired SMS number. For information about making changes under Adjustments, see *Adjustments* on page 109.

Time and Day

The Time and Day settings determine for each day the time period to apply the rule. You can use these settings to take advantage of special off peak phone rates or to balance fax loads between servers at the times when your fax traffic is the highest.

Note If you enter a range that straddles two days, the system divides the time between the current and the next day, adding the time range for the next day to any existing time ranges. Verify that the time ranges for each day are correct.

Quick Sets

Click one of the following to quickly apply common time restriction settings:

- **All Times** applies 00-23 from 00:00:00 to 23:59:59 every day. This is the default.

- **Weekend** applies 00-23 to Saturday and Sunday and removes all weekday settings .

- **Weekdays** applies 00-23 to Monday through Friday and removes all weekend settings.

- **Peak Times** applies 00-18 to Monday through Friday and removes all weekend settings.

- **Never** removes all settings.

Special Actions

Use the Special Actions settings to set special sending options, such as sending at specific times or on specific channels, increase the weight of the rule, or disable it.

Days (listed separately)

For each day on which the rule should be applied, enter *hh-hh* to specify the time range. *hh* is the time in 24-hour format. Do not specify minutes. To change the hours that a rule is applied, do one of the following:

- To specify multiple time ranges, enter the time ranges separated by comma in the format *hh-hh*,*hh-hh*.

  Example To have a rule apply nights only between 7 P.M. and 2 A.M., enter **00-02,19-23** in each day of the week box.

- To not apply a rule during a given day, delete any entries and leave the box blank.

No special action

Click to process faxes without delay on any available channel.

Send on specific range of channels

Click to send the fax only on the channels you specify. The channel range specified here overrides any channel restriction placed on a specific fax using the <CHANNEL> embedded code. This parameter is not transferred with the fax if it is routed to another fax server for sending.

Disallow sending

Select this option to prevent faxes from sending based on attributes such as the number pattern, time of day, or sender. The user gets the message "Fax blocked from dialing phone number." This is sometimes referred to as the Do Not Dial or DnD feature. For information about setting notifications for disallowed faxes, see *DnD Notifications* below.

Reschedule after disallow sending

Select this option to prevent faxes from sending based on attributes such as the number pattern, time of day, or sender and then, based on the settings on the Time and Day tab, retries faxing at the same time each subsequent day until the fax is either sent or blocked altogether.

Example If a user tries to send a fax at 1 P.M. on Saturday and has weekend time restrictions in effect, the fax is not sent until 1 P.M. on Monday, when dialing rules no longer restrict sending.

Delay fax to specific time

Select this option to prevent the fax from sending before a specified time of day. If the specified time is earlier than the time the fax is received, the fax will be sent at that time on the next day.

In the **Delay until** box, enter the time using 24-hour notation (0000–2359).

> **Note** Least-Cost Routing rules are evaluated one time. If this setting delays transmission, other settings for the rule will not be evaluated.

Delay fax for specific interval

Select this option to delay the fax from sending for a specified number of minutes. In a Shared Services environment, using this option in conjunction with a dialing rule of greater weight that will send the faxes immediately, you can prevent faxes from being sent by a DocTransport with incompatible telephony settings in case the original DocTransport is down.

In the **Minutes to delay** box, enter the number of minutes to delay.

> **Note** Least-Cost Routing rules are evaluated one time. If this setting delays transmission, other settings for the rule will not be evaluated.

DnD Notifications

DnD notifications notify about faxes that were blocked by the Disallow Sending feature. Disallow Sending is also referred to as Do Not Dial (DnD). For more information, see *Special Actions* on the previous page.

Users to notify

Enter the RightFax user IDs to which to send notifications about faxes that are blocked by the Disallow Sending feature.

Under **Users to notify**, select the check box for each user to notify.

Notify the sender that the document was blocked

Select this check box if you want the sender to be notified after attempting to send a fax to a blocked number.

If this option is not selected, the sender will get the "Fax number blocked" custom message. To configure this message, see the *RightFax Administrator Guide*.

Example of dialing rules

Example A company with RightFax servers in New York and Seattle adds the following dialing rules on the New York server:

- 206-???-????
  Remove first three digits and send via Seattle server

- 206-820-50??
  Remove first six digits and receive into Seattle server

When someone in New York sends a fax to 206-820-7000 (a customer in Seattle) the server routes the fax to the Seattle server which sends it via a local call. When someone in New York sends a fax to a co-worker in Seattle at 206-820-5065, the server considers the fax a received fax and routes it to the appropriate internal fax mailbox (5065).

Testing dialing rules and fax routes

You can test and confirm your dialing rules and fax routing scheme without sending a fax.

To start testing

- In Web Admin, in the left pane, click **Dialing Rules**. The testing options appear in the right pane.

- Open the list of dialing rules, and then click **Test Dialing Plan**.

To verify the route of a fax

1. In the **Fax Number** box, enter a fax number. You can also enter a specific **User ID**, **Group ID**, **Fax priority**, and **Number of pages** to test how each affects the fax routing.

2. To test routing for production faxes, select the **Integration fax** check box. Production faxing is implemented with the optional Integration module.

3. If the dialing rule applies to SMS messaging, select the **SMS message** check box.

4. Click **Trace Route**. As the fax number passes one or more servers, the results box shows the following:

   - Which rules are being used.

   - How the fax number is manipulated along the way.

- The number of hops or jumps from server to server.

- The time it takes to route between servers. This does not include the time to transfer image data. That additional time depends on the size, resolution, and density of the fax.

To verify dialing rule execution

1. In the **Fax Number** box, enter a fax number. You can also enter a specific **User ID**, **Group ID**, **Fax priority**, and **Number of pages** to test how each affects the route and execution of the dialing plan.

2. To test the rule execution for production faxes, select the **Integration fax** check box. Production faxing is implemented with the optional Integration module.

3. If the dialing rule applies to SMS messaging, select the **SMS message** check box.

4. Click **Execute Rules**. As the fax is routed, the results box shows the following:

   - Each dialing rule against which the fax number is compared.

   - Information about the match weights and server availability.

Viewing destination tables

Destination tables contain groups of numbers such as dialing prefixes and area codes. You can use destination tables to create dialing rules for a range of numbers instead of creating a separate rules for each number pattern. For information about creating destination tables, see the *RightFax Administrator Guide*.

To open the list of destination tables

- In Web Admin, in the left pane, click **Destination tables**. The list of destination tables appears in the right pane.

Blocking outbound calls

You can prevent users from sending faxes to certain numbers by using dialing rules in combination with a destination table.

The DocTransport module by default blocks all outgoing calls to numbers beginning with 911 (the standard emergency number throughout the United States). All non-numeric characters are ignored by DocTransport.

Example If a user sends a fax to *,,911*, DocTransport ignores the two preceding commas, matches *911*, and then blocks the number.

> **Note** You can also use the Windows registry keys for DocTransport BlockedNumbers and BlockingFlags to further block faxes to specific numbers and control sending to 911. Entries added in the BlockedNumbers registry key are written to the database and applied to all DocTransports on all servers. See the *RightFax Administrator Guide*

To add or change blocked numbers

1. Create a destination table for the numbers you want to block. See the *RightFax Administrator Guide*.

2. Create a dialing rule that uses that table for the matching string.

3. Edit the dialing rule to **Disallow sending**.

4. Save the rule.

Full RightFax administrators can approve, disapprove, or delete faxes that were blocked by dialing rules. Approved faxes are immediately scheduled to send. Disap proved faxes are assigned a status of "Fax was disapproved" in the original sender's FaxUtil mailbox.

To approve or disapprove a fax blocked by a dialing rule

1. Sign on to FaxUtil as an administrator and on the **List** menu, click **Administrative Mode**

2. To view only faxes needing approval, on the **List** menu, click

Needing Approval.

3. Right-click the fax. On the shortcut menu, point to **Status**, and then click **Approve Fax** or **Disapprove Fax**. You can add a note (up to 450 characters) to be stored in the fax history together with the date and your user ID

Examples of Least-Cost Routing

This section describes several examples of Least-Cost Routing.

Scenario 1: Using LCR (a simple example)

PDQ Company has a RightFax server in New York City (NYSERVER) and one in Tucson (TSNSERVER).

PDQ determines that it would be cheaper to send New York faxes bound for Tucson and Southern Arizona numbers via TSNSERVER. It adds this rule to NYSERVER:

520+
Send via fax server TSNSERVER.

Scenario 2: Using dialing destination tables

PDQ Company wants to make sure that TSNSERVER will correctly dial Southern Arizona numbers outside of Tucson by prepending a 1.

PDQ could add rules to TSNSERVER that prepend all numbers that have a certain prefix, such as 458, with 1 and as needed strip the 520 area code before prepending the 1:

458+
Send via local fax server. Prepend 1.

520-458+
Send via local fax server. Strip 3 digits from beginning. Prepend 1.

But PDQ determines that area code 520 includes several prefixes for which similar rules would need to be created. To avoid having to create individual rules for each prefix, PDQ creates a destination table named SOUTHAZ that includes all necessary prefixes. And it creates the

following two rules on TSNSERVER referencing the SOUTHAZ destination table:

%[SOUTHAZ,3]+
Send via local fax server. Prepend 1.

520-%[SOUTHAZ,3]+
Send via local fax server. Strip 3 digits from beginning. Prepend 1.

Scenario 3: Distinguishing '+' wildcard rules from other local numbers

The PDQ system administrator for NYSERVER notices that faxes bound for internal four-digit PBX numbers in New York that begin with 520 are being inadvertently routed to Tucson. In addition, New York just added a prefix for the Tri-State area of 520 (requiring a 1 to be dialed first from the PDQ office.) Those calls too are going to Tucson. To correct this situation, the administrator adds these two rules to NYSERVER:

520?
Send via local fax server.

520-????
Send via local fax server. Prepend 1.

These two rules intercept 520 calls that would otherwise match the 520+ rule in Scenario #2. These rules would match the local destination numbers more specifically and therefore be weighted more heavily.

Scenario 4: Stripping unnecessary digits

The PDQ system administrator for NYSERVER has also noticed that recent transfers from the Tucson site out of habit still dial a 1 at the beginning of ten digit long distance numbers. Because the PDQ New York long distance carrier does not require it, the administrator adds a rule to NYSERVER to strip the 1 from these numbers:

1-???-???-????
Send via local fax server. Strip 1 beginning digit.

Scenario 5: Using LCR (an advanced example)

PDQ Company opens a sales office in Los Angeles with a new RightFax server (LASERVER). PDQ and the local phone companies in

L.A. have worked out a special low rate for all calls in the local Los Angeles/Orange County area. A similar deal was worked out for the New York metro area. This means PDQ can save money by routing all LA faxes to the LASERVER and all NY faxes to the NYSERVER. Because of charges related to the TCP/IP connection between L.A. and N.Y., it is still cheaper to send faxes during off-peak periods to L.A. and N.Y. via direct long distance dialing.

PDQ would first set up the following destination tables:

- On NYSERVER an LA area code table (LAACODE) and an LA area code+destination table (LAPREFIX).
- On LASERVER a NY area code table (NYACODE) and a NY area code+destination table (NYPREFIX).

LAACODE and NYACODE each contain a list of area codes that match the low-rate phone numbers in their respective regional areas. LAPREFIX and NYPREFIX match numbers with low rates in area codes where only certain prefixes in area code are included in the special low rate.

PDQ would define the following two rules on NYSERVER:

%[LAACODE,3]+
Time of day set to peak times. Send via fax server LASERVER.

1%[LAPREFIX,6]+
Time of day set to peak times. Send via fax server LASERVER.

LASERVER would have a matching set of rules referencing NYACODE and NYPREFIX and routing to NYSERVER. Peak times are specified because it is still cheaper to send in the evening and at night via long distance.

A local rule stripping off the unnecessary area code is required on both the NYSERVER and LASERVER. PDQ adds this rule on NYSERVER and a similar rule on LASERVER:

212+
Send via local fax server. Strip 3 digits.

To enable Least-Cost Routing for TSNSERVER to NY and LA, a copy of each of the four destination tables and each of the dialing rules would be entered on TSNSERVER.

Scenario 6: Boosting priority

PDQ Company is expanding and the load on the RightFax servers is increasing. PDQ decides to boost the priority of faxes from certain high priority Groups and Users on LASERVER to verify that their faxes are sent quickly. This rule is added to LASERVER:

+
Restricted only to Users: SALESMGR,CFO and to Group: TOPDOGS. Priority Delta +1.

Scenario 6: International routing

PDQ Company expands into the international market. Their first overseas site is London which has a RightFax server installed (UKSERVER). All faxes from LA, NY, and Tucson bound for England need to be routed to UKSERVER. This rule is added to each of these servers:

011-44+
Send via fax server UKSERVER.

Rules would need to be placed on UKSERVER to normalize the phone numbers for England (such as stripping area codes or adding digits if necessary).

Scenario 7: Load balancing

PDQ adds another RightFax server to its expanding NY site (NYSERVER2).Usage data indicates that during peak times, faxes on NYSERVER are taking on average several minutes longer to be sent than those on NYSERVER2. Upon analysis, PDQ finds that the users of NYSERVER are sending many more faxes than the users on NYSERVER2.

By entering these two rules on each server, new outgoing faxes on each server are routed to the one with the least load:

+
Send via local fax server.

+

Send via fax server NYSERVER2 (or NYSERVER).

Because each rule is weighted the same, RightFax load balances between the two servers.

Scenario 8: Backup servers

PDQ Company's system administrator for LASERVER hears about the new NYSERVER2 in New York and decides to make use of the additional server by replicating all the dialing rules on LASERVER for NYSERVER but this time referring them to NYSERVER2. This leads to a guaranteed path of Least-Cost Routing if one or the other of the N.Y. servers fail for any reason.

Upon hearing about the new NYSERVER2 in New York, PDQ Company's system administrator for LASERVER replicates all the dialing rules on LASERVER for NYSERVER but this time referring them to NYSERVER2. This leads to a guaranteed path of Least-Cost Routing should one or the other of the New York servers fail for any reason.

Chapter 20: Creating phonebook entries in FaxUtil Web

To sign in

1. Open http://*<servername>*/RightFax/User or
   https://*<servername>*/RightFax/User where servername is
   either the name of the RightFax server or its IP address.

2. In the **User ID** box, enter an administrator password. If required,
   enter the **Password**, and then click **Sign In**.

To sign out

- On the *<username>* menu, click **Sign Out**.

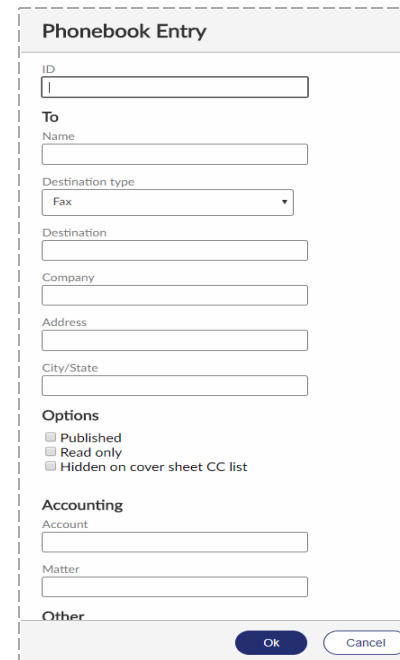## Creating a personal RightFax phonebook

Your RightFax phonebook can include entries for individual fax
recipients and groups of fax recipients.

To open your RightFax phonebook

- From your fax mailbox, click **Phonebook**. The **Phonebook** page
  opens.

To create an individual entry

1. On the **Phonebook** page, on the **New** menu, click **Phonebook
   Entry**. The **Phonebook Entry** dialog box opens.

2. In the **ID** box, type an ID for the entry.

3. Under **To**, enter addressing information for the recipient.

4. Under **Options**, select any of the following check boxes:

- **Published**. If selected, the entry will be available to other RightFax users. If your RightFax account is not password-protected, unpublished entries from your phonebook will be accessible to other users.

- **Read only**. If selected, only you can edit the entry.

- **Hidden on cover sheet CC list**. If selected, the item will not appear in the CC list on the cover sheet.

5. Under **Accounting**, enter billing codes to assign to all faxes sent to this recipient.

6. Under **Other**, enter optional contact information, such as a secondary fax number, voice numbers, and the recipient's fax ID. In the **Notes** box, enter notes about the recipient.

7. Click **Ok**. The new entry appears in your phonebook list.

To create a group entry

A group phonebook entry can consist of both individual and group entries.

1. On the **Phonebook** page, on the **New** menu, click **Phonebook Group**. The **Phonebook Group** dialog box opens.

2. In the **ID** box, type an ID for the group.

3. Under **Available users and groups**, select the users and groups to include in the group. To search for a user or group, in the search box, enter a full or partial user or group ID.

4. Click **Add**. The users and groups are added to the **Current group members** list. To remove an entry from the list, select the entry, and then click ☒.

5. Select any of the following check boxes to specify who can view and edit this group phonebook entry.

- **Published**. If selected, the entry will be available to other RightFax users. If your RightFax account is not password-protected, unpublished entries from your phonebook will be accessible to other users.

- **Read only**. If selected, only you can edit the entry.

6. Click **Ok**. The group appears in your phonebook list.
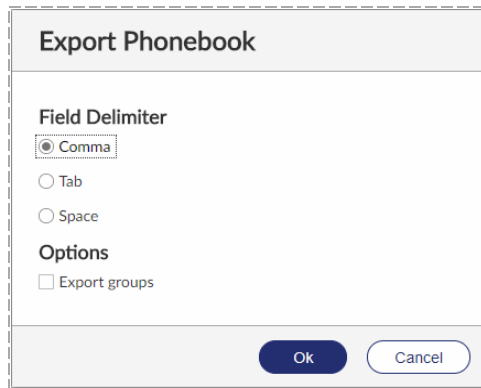
To print phonebook entries

Exporting phonebook entries

You can export your RightFax phonebook to a text file.

To export the phonebook

1. In your fax mailbox, click **Phonebook**. The **Phonebook** page opens.

2. On the **File** menu, click **Export**. The **Export Phonebook** dialog box opens.

Export Phonebook

Field Delimiter
- Comma
- Tab
- Space

Options
- Export groups

Ok   Cancel

3. Under **Field Delimiter**, select the delimiter to use to separate fields within phonebook entries, **Comma**, **Tab**, or **Space**.

4. To include phonebook groups as separate entries in the file, select the **Export groups** check box. The text file shows groups at the bottom of the file, and the IDs of the users in each group are listed.

5. Click **Ok**.

Chapter 21: Managing phonebooks in FaxUtil

Depending on your user account configuration and access, you can store fax recipient information in a RightFax phonebook and link to existing ODBC, LDAP, or MAPI contact lists.

Creating a personal RightFax phonebook

Your RightFax phonebook can include entries for individual fax recipients and groups of fax recipients. When you add or edit an entry, you can select any of the following to specify who can view and edit the entry:

- **Published**. The entry will be available to other RightFax users.

  > **Caution** If your RightFax account is not password-protected, unpublished entries from your phonebook will also be accessible to other users.

- **Read Only**. Only you can edit the entry.

- **Externally available**. The entry will be available outside of RightFax.

- **Hidden on cover sheet CC list**. The information for individual entries will not appear in the CC list on the cover sheet.

To open your RightFax phonebook

- From your mailbox, click **Phonebook**. The Phonebook window opens.
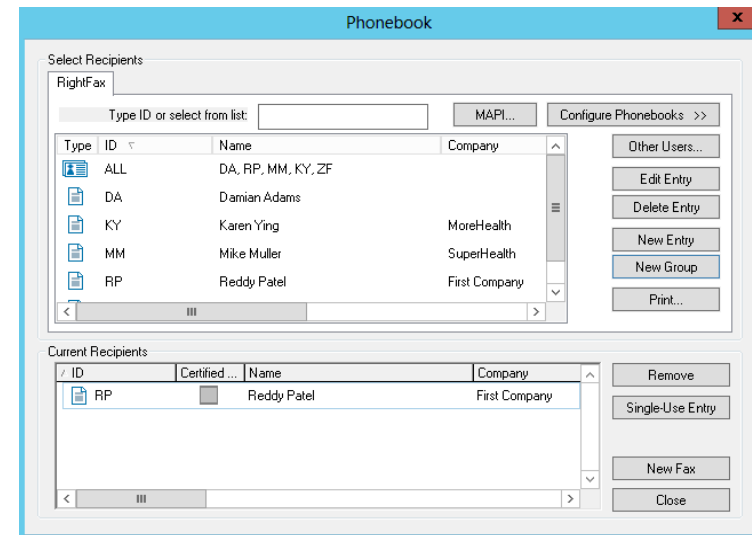
Creating RightFax phonebook entries

To create or edit an individual entry

1. In the **Phonebook** window, do one of the following:
   - Click **New Entry**.
   - Click the entry in the list, and then click **Edit Entry**.

2. In the **ID** box, type an ID for the entry.

3. Under **Address**, enter addressing information for the recipient; at a minimum, enter a name and a fax number.

4. Under **Other**, enter optional contact information, such as a secondary fax number, voice numbers, and the recipient's fax id.

5. Under **Options**, select any of the following check boxes:

   - **Published**. If selected, other RightFax users can view the item.

   - **Read Only**. If selected, only the owner can modify the item.

   - **Externally available**. If selected, the item is available to applications other than RightFax software.

   - **Hidden on cover sheet CC list**. If selected, the item does not appear in the CC list on the cover sheet.

6. Under **Billing Information**, enter billing codes and notes you want to assign to all faxes sent to this recipient.

7. Click **OK**. The new entry appears as an individual entry in your phonebook list.

To create or edit a group entry

A group phonebook entry can consist of both individual and group entries.

1. In the **Phonebook** window, do one of the following:

   - Click **New Group**.

   - Click the group in the list, and then click **Edit Entry**.

2. In the **ID** and **Type name or select from list** boxes, enter an ID and a description for the group.

3. Select any of the following check boxes to specify who can view and edit this group phonebook entry.

   - **Published**. If selected, other RightFax users can view this phonebook item.

   - **Read Only**. If selected, only the owner can modify this phonebook item.

   - **Externally available**. If selected, this phonebook item is available to applications other than RightFax software.

4. In the box on the left, select all individual and group items you want to add to the group, and then click the right arrow to move them to the **Group Members** box.

5. Click **OK**. The group appears in your phonebook list.

Importing phonebook entries

To load another user's public phonebook entries

1. In the **Phonebook** window, click **Other Users**.

2. In the **Search for Users** box, enter a full or partial user name or a RightFax user ID, and then click **Search**.

3. Select the user, and then click **Load**. Any public entries from this user's phonebook appear in your RightFax phonebook list.

    indicates if a user account is disabled,   if it is unprotected.

4. Repeat to load public phonebook entries from another user.

To import entries from a text file

If your user account permission allows creating and editing phonebooks, you can import entries into your personal phonebook from a specially formatted text file.

- To create the import file, see *Creating a text file to import* below.

- To import the file, see *Importing entries from a text file* on the next page.

Deleting RightFax phonebook entries

To delete an entry

1. In the **Phonebook** window, in the list, click the entry.

2. Click **Delete Entry**, and then click **Yes** to confirm the deletion.

Printing RightFax phonebook entries

To print all or select phonebook entries:

1. Click **Phonebook**.

2. To print all entries in the phonebook, click **Print**. Otherwise select the entries in the list, and then click **Print Selected**.

3. Select the printer and specify any other print settings, and then click **Print**.

Creating a text file to import

The import file can be generated by an external source such as a contact database manager, exported from another RightFax phonebook, or generated by the RightFax PhnPrint administrative utility. For information about PhnPrint, see the *RightFax Administrative Utilities Guide*.

The file to import must be a comma-, tab-, or space-delimited ASCII text file where:

- The first line is made up of the RightFax field names shown in the table below. When exporting from an existing source, map each field name to the corresponding RightFax name.

- Each phonebook record is separated from the next by a line break.

- Each field is separated from the next by a comma, tab, or space, depending on the selected format.

- The field values in each record appear in the same order as the corresponding field names on the first line.

- Each blank field value appears as a single space surrounded by quotation marks (" ").

- If quotation marks are used to surround any field name or field value, they must be used for all fields in the file.

The following table lists each of the valid phonebook entry fields.

Field name	Max length	Description
ID	17	A unique ID used only to reference the phonebook entry. It never appears on the fax.
Name	59	The recipient's name as it will appear on the fax cover sheet.
Company	59	The recipient's company name as it will appear on the fax cover sheet.
Address	59	The recipient's address as it will appear on the fax cover sheet.
CityState	59	The recipient's city and state as they will appear on the fax cover sheet.
Fax1	31	The recipient's primary fax number. This is used when dialing the fax destination and may appear on the fax cover sheet.

| Field name	Max length	Description
Fax2	31	The recipient's alternate fax number. This is used when dialing the fax destination and may appear on the fax cover sheet.
Voice1	31	The recipient's primary voice number as it will appear on the fax cover sheet.
Voice2	31	The recipient's alternate voice number as it will appear on the fax cover sheet.
FaxID		The recipient's fax ID.
BillCode1	17	A code associated with the recipient used for billing or tracking purposes. It never appears on the fax.
BillCode2	17	An additional code associated with the recipient used for billing or tracking purposes. It never appears on the fax.
Notes	128	Any additional information about the recipient. This will not appear on the fax and is for your information only.

Example The following shows the first three lines and first three fields of an import file. Instead of (…), a usable import file would include all field names listed in the table and field values for each. For an example of a blank field value, see the value for Company in the second record.

```
"ID","Name","Company",(...)

"Jan","Jan Smith","First Company",(...)

"Reddy","Reddy Patel"," ",(...)
```

Importing entries from a text file

To import entries from a text file

1. On the **Tools** menu, click **Phonebook Import**.
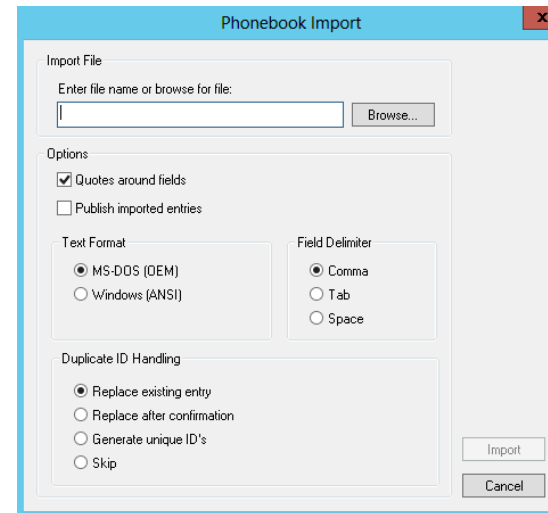
2. Enter the path and file name of the text file to import, or browse to it.

3. As needed, select the **Quotes around field** check box to specify that the entries in the import file include quotes and the **Publish imported entries** check box to make the imported phonebook entries available to other user.

4. Under **Text Format**, click the format of the import file.

5. Under **Field Delimiter**, click whether the fields within the import file are separated by comma, tab, or space.

6. Under **Duplicate ID Handling**, specify the action to take when a duplicate ID is encountered:

   - To import the entry and replace the existing entry, click **Replace the existing entry**.

   - To import the entry and replace the existing entry if confirmed during import, click **Replace after confirmation**.

   - To import the entry and assign a unique ID, click **Generate**

unique IDs.

- To not import the entry, click **Skip**.

7. Click **Import** . As needed, respond to confirmation messages for duplicate entries.

Exporting the entries from your RightFax phonebook

You can export phonebook entries to a comma, tab, or space delimited text file.

To export the phonebook to a comma, tab, or space delimited text file

1. On the **Tools** menu, click **Phonebook Export**.

2. To include phonebook groups as separate entries in the file, select the **Export Groups** check box. The text file shows groups at the bottom of the file, listing the IDs of the users in each group.

3. Click the delimiter to use to separate fields within phonebook entries: **Comma**, **Tab**, or **Space**.

Selecting MAPI, LDAP, or ODBC phonebook entries

You can select entries from phonebooks other than the RightFax phonebook only if you have user permission to create and edit phonebooks. For information about configuring MAPI, LDAP, and ODBC phonebooks, see the *RightFax Administrator Guide*.

To select recipients from a MAPI source

1. Click **Phonebook**, and then click **MAPI**.

2. In the **Profile Name** box, select the MAPI profile name, and then click **OK**.

3. If prompted, enter your network user name, domain, and password, and then click **OK**.

4. In the contact list, double-click each contact entry you want to select, and then click **OK**. You can search for recipients by name only or by data in other columns.

The selected entries appear in the **Current Recipients** list of the Phonebook window.

To select recipients from an ODBC or LDAP phonebook

1. Click **Phonebook**.

2. On the tab of the phonebook, select the entries, and then click **OK**. Use the arrow keys to show more records.

Chapter 22: Setting up workflows

Workflows can be configured for handling faxes among different users or groups in an organization. For example, faxed invoices may be handled by several departments in an organization, such as the Sales department and then the Accounts Payable department.

Metadata helps describe an item and can be many kinds of information such as a location, a date, or an invoice number. Each sent and received fax is associated with a set of RightFax-specific metadata. With workflows, custom metadata fields can be configured for received faxes so that users in a workflow can associate faxes with additional descriptive information.

A workflow can capture unlimited metadata.

For example, faxed invoices may route to a workflow that is configured for RightFax Archive. In FaxUtil, the faxes appear in the workflow mailbox of all assigned users. These users collaborate to tag the faxed invoices with the required metadata. After a fax is tagged with metadata, it is removed from the workflow mailbox. When archiving occurs, the completed faxes move to RightFax Archive.

In the RightFax client applications, if a user is responsible for tagging faxes in a workflow, then a workflow mailbox appears in the tree view in the left pane of the RightFax client application.

Metadata only can be added to received faxes. If a user opens a fax to tag it with metadata, the fax is locked so that other users cannot open it.

Preparing to configure workflows for metadata tagging

Before you begin configuring workflows, prepare the following information.

- Identify the types of received faxes that will be tagged with metadata. For example, invoices and orders.

- For each type of received fax, create a list of the metadata that you wish to capture. For example, order date and ship date.

- Determine which users or groups of users should add metadata to faxes.

- Determine the workflow and the ultimate destination of the fax. For example,
  - Workflow step 1: Faxes are received in a central mailbox where a user evaluates each fax for appropriate action. One of the faxes is an order for the Sales department, so the user routes the fax to the Sales department to verify that the order is complete.
  - Workflow step 2: From the Sales department, the fax is routed to the Accounts Receivable department to initiate the invoice.
  - Workflow step 3: From the Accounts Receivable department, the fax is routed the fax to RightFax Archive.

- Identify exceptions to the workflows so that users can divert faxes

from workflows. For example, if a Sales order is received with the incorrect price for goods sold, the order can be diverted in order to correct the price. Identify the steps in the exception workflows.

- For each type of received fax, determine the routing code that will route faxes to a workflow. For information about routing codes, see the *RightFax Administrator Guide*.

- To retrieve the metadata after the faxes have been tagged, you must license and configure RightFax XML Generator or RightFax Vault. For information, see the *RightFax XML Generator Administrator Guide* or the *RightFax Vault Administrator Guide*. Metadata for each fax in a workflow can be viewed in FaxUtil or FaxUtil Web.

Creating, editing, and deleting workflows for metadata tagging

To create new workflows, complete the following general steps:

1. Create exception workflows. Workflows can include subordinate workflows for handling exceptions (known as "exception workflows"). Exception workflows allow users to divert faxes from a workflow and then return them to the original workflow. You must create exception workflows before you create workflows.

2. Create workflows.

3. After you create workflows, assign RightFax users to the workflows. See the *RightFax Administrator Guide* to define delivery methods for users.

To create a workflow

- In Web Admin, in the left pane, click **Workflows**. The list of workflows appears in the right pane. Click **New**. You have the following options:

- To create a workflow, click **New workflow**, see *Configuring the properties of a workflow* on page 132.

- To create an exception workflow, click **New exception workflow**, and see *Configuring the properties of an exception workflow* below.

To delete a workflow

- Select the workflow in the list, and then click **Delete**.

Configuring the properties of an exception workflow

After you create exception workflows, they can be added to workflows, as described in *Configuring the properties of a workflow* on page 132.

In the **New Exception Workflow** dialog box, click the tab you want to edit.

The General tab

New Exception Workflow

General   Actions   Time Limit

ID

Description

Responsible groups or users

None selected

Metadata

New   Edit   Delete

Name   Default   Required

OK   Cancel

1. In the **ID** box, enter the name of the exception workflow.

2. In the **Description** box, enter a description of the exception workflow.

3. In the **Responsible groups or users** box, select the users and groups that will be responsible for tagging faxes in the exception workflow with metadata. The responsible user of one workflow can edit the data from any previous workflow through which the fax has flowed.

4. Under **Metadata**, click **New**. The **New Metadata** dialog box opens.

5. In the **Name** box, enter a descriptive name for the metadata field. This name will appear in the fax viewer as a prompt for users who are tagging faxes with metadata.

6. Select one of the following:

   - If you wish for users to enter free form text, click **User entry**. If you wish to specify a default value, in the **Default** box enter the value. The user can change this text during data entry.

   - If you wish to provide multiple choices, you can create up to five options from which users can select. Click **Multiple choice**. In the **Choices** box, enter the text for the first choice. Subsequent text boxes will appear after each entry. If you wish to select one of these as the default value, under **Default** click the selection.

     Multiple choice entries will appear in the fax viewer in the order they are created.

7. If the metadata is required, select the **Required** check box.

The Actions tab

- The **Completion Action** determines the disposition of the fax when metadata tagging is completed. The fax will be re-submitted to the workflow that had the exception.

- Under **Removal Action**, select one of the following actions:

  - **Disabled**. The user cannot remove the fax from the workflow.

  - **Submit to another workflow**. The fax will be routed to another workflow. Under **Workflow**, select the name.

  - **Route to RightFax user**. The fax will be routed to another RightFax user. Under **User ID**, select the user ID. (Note that if

this user is deleted at a later time, the removal action will change to None.)

When a fax is removed from a workflow, the metadata for the current workflow is not saved.

The Time Limit tab

1. To set a time limit to complete each fax in the exception workflow, under **Completion Time Limit**, select the number of days or hours. The completion time is calculated from the time the fax arrives in the workflow.

2. Reminder and warning notifications can be set for faxes in the exception workflow. The time remaining for the reminder is

calculated from the completion time (the time remaining before the workflow deadline). Select the check box **Send reminder (time remaining)** or **Send warning (time remaining)**, and then select the days, hours, or minutes before the completion time when the reminder or warning should be sent to the user. A reminder or warning is sent once for each fax.

3. Under **Notify this user**, select the RightFax user who will receive the reminder or warning.

4. Configure the email or SMS service for the selected users who will receive notifications. See *Creating RightFax user accounts on page 17*.

Configuring the properties of a workflow

In the **New Workflow** dialog box, click the tab you want to edit.

The General tab

1. In the **ID** box, enter the name of the workflow.

2. In the **Description** box, enter a description of the workflow.

3. In the **Responsible groups or users** box, select the users and groups that will be responsible for tagging faxes in the workflow with metadata. The responsible user of one workflow can edit the data from any previous workflow through which the fax has flowed.

4. Under **Metadata**, click **New**. The **New Metadata** dialog box opens.

5. In the **Name** box, enter a descriptive name for the metadata field. This name will appear in the fax viewer as a prompt for users who are tagging faxes with metadata.

6. Select one of the following:

   - If you wish for users to enter free form text, click **User entry**. If you wish to specify a default value, in the **Default** box enter the value. The user can change this text during data entry.

   - If you wish to provide multiple choices, you can create up to five options from which users can select. Click **Multiple choice**. In the **Choices** box, enter the text for the first choice. Subsequent text boxes will appear after each entry. If you wish to select one of these as the default value, under **Default** click the selection.

     Multiple choice entries will appear in the fax viewer in the order they are created.

7. If the metadata is required, select the **Required** check box.

The Actions tab

Workflows, select up to four workflows. Exception workflows are not available for completion actions.

- **Route to RightFax user**. The fax will be routed to another RightFax user. Under **User ID**, select the user ID. (Note that if this user is deleted at a later time, the completion action will change to None.)

- Exception workflows allow users to divert faxes from a workflow and then return them to the original workflow. To provide this method, under **Exception Action**, select one of the following:

  - **Disabled**. The user cannot remove the fax from the workflow.

  - **Submit to an exception workflow**. The fax will be routed to another workflow. Under **Workflow**, select the name.

- To provide a method for a user to remove a fax from the workflow, under **Removal Action**, select one of the following:

  - **Disabled**. The user cannot remove the fax from the workflow.

  - **Submit to another workflow**. The fax will be routed to another workflow. Under **Workflow**, select the name. Exception workflows are not available for removal actions.

  - **Route to RightFax user**. The fax will be routed to another RightFax user. Under **User ID**, select the user ID. (Note that if this user is deleted at a later time, the removal action will be disabled.)

When a fax is removed from a workflow, the metadata for the current workflow is not saved.

- The completion action determines the disposition of the fax when metadata tagging is completed. Under **Completion Action**, select one of the following:
  - **None**. The fax will be removed from the list of faxes that require metadata, and it will be aged or archived according to the configuration of the workflow mailbox.

  - **Submit to another workflow**. The fax will be routed to another workflow. Under **Workflow**, select the name. Exception workflows are not available for completion actions.

  - **Allow responsible users to select another workflow**. Users in the workflow can choose another workflow for the fax. Under

The Time Limit tab

New Workflow

General   Actions   **Time Limit**

Completion Time Limit

Days   Hours

0   0

For no time limit, set both to zero.

Notifications

☐ Send reminder (time remaining)

Days   Hours   Minutes

0   0   0

☐ Send warning (time remaining)

Days   Hours   Minutes

0   0   0

Notify this user

ADMINISTRATOR ✕   ▾

OK   Cancel

1. To set a time limit to complete each fax in the workflow, under **Completion Time Limit**, select the number of days or hours. The completion time is calculated from the time the fax arrives in the workflow.

2. Reminder and warning notifications can be set for faxes in the workflow. The time remaining for the reminder is calculated from the completion time (the time remaining before the workflow deadline). Select the check box **Send reminder (time remaining)** or **Send warning (time remaining)**, and then select the days, hours, or minutes before the completion time when the reminder or warning should be sent to the user. A reminder or warning is sent once for each fax.

3. Under **Notify this user**, select the RightFax user who will receive the reminder or warning.

4. Configure the email or SMS service for the selected users who will receive notifications. See *Creating RightFax user accounts on page 17*.

Managing workflows

The RightFax administrator can ensure that faxes in workflows are being processed in a timely manner.

To view the status of a workflow

1. In Web Admin, in the left pane, click **Workflows**. The list of workflows appears in the right pane.

2. Click **Status**. The status dialog box appears.

   - **Waiting**. The number of faxes in the workflow that are waiting to be viewed since they entered the workflow. Shows the number of faxes waiting , the average time waiting, and the longest time a fax has waited to be viewed.

   - **Processing**. The number of faxes in the workflow that are open in the fax viewer.

   - **Total**. The total number of faxes that are waiting and in processing in the workflow, the average total time in the workflow, and the longest time a fax has existed in the workflow.

To view the workflow in FaxUtil Web, select the workflow and click **Open in FaxUtil Web**. FaxUtil Web opens with the workflow folder open.

To view the faxes in a workflow in the client applications

1. In FaxUtil or FaxUtil Web, log in as the administrator or workflow mailbox user. The list of workflows appears in the left pane.

2. Click the workflow, and all of the faxes in the workflow appear in the fax list in the right pane. This includes available, unavailable, and completed workflow faxes. If a fax is locked by another RightFax user, then the user ID appears in the **Availability** column. If the administrator opens a fax that has not been completed (the "complete workflow" action is pending), then the user will see a message that the fax is in use by an administrator.

   If a fax is unavailable, then a RightFax administrator can make it available. On the **Fax** menu, click **Make Available**.

Chapter 23: Configuring faxing for the Epic Print Service

If your RightFax system will send faxes that are submitted by a system from Epic Systems Corporation via the Epic Print Service, enter the Epic authentication credentials in RightFax.

This option only is available if you have licensed the RightFax Integration Module.

To enter Epic system authentication credentials

1. In Web Admin, in the left pane, click **System**.

2. In the right pane, click **Integrations**, and then click **Configure Epic Authentication**.

3. In the **Configure Epic Authentication** dialog box, enter the user name, password, and client ID for the Epic system.

Chapter 24: Installing a TLS/SSL certificate

You can install digital code signing certificates on the IIS server for secure sessions via HTTPS.

You have the following options for installing and uploading a certificate.

- Create a self-signed certificate.
- Use a certificate from a third-party certificate authority. The certificate must be X.509 format, base-64 encoded.
- Use a private certificate authority.

To create a self-signed certificate

1. In Web Admin, in the left pane, click **System**.
2. In the right pane, click **TLS/SSL Certificate**.
3. Under **Self-Signed Certificate**, click **Create**. The **Create Self-Signed Certificate** dialog box opens.
4. In the **Common name** box, enter the unique, fully qualified domain name of the IIS server.
5. Enter the identifying organizational information in the **Organization**, **Organizational unit**, **City/Locality**, **State/Province**, and **Country/Region** boxes, and then click **Ok**.
6. After the certificate is created, under **Security**, click **Change**. In the **Change Security** dialog box, select the certificate, and then select the **Use TLS/SSL** check box.

To use a certificate from a third-party certificate authority

1. In Web Admin, in the left pane, click **System**.
2. In the right pane, click **TLS/SSL Certificate**.
3. Under **Signing Request**, click **Create**. The **Create Signing Request** dialog box opens.
4. In the **Common name** box, enter the unique, fully qualified domain name of the IIS server.
5. Enter the identifying organizational information in the **Organization**, **Organizational unit**, **City/Locality**, **State/Province**, and **Country/Region** boxes, and then click **Ok**.
6. When you receive the third-party certificate, under **Certificate**, click **Upload**.
7. In the **Upload Certificate** dialog box, click **File name**, and select the third-party certificate. Select **Upload signed response**, and then click **Ok**.
8. Under **Security**, click **Change**. In the **Change Security** dialog box, select the certificate, and then select the **Use TLS/SSL** check box.

To use a private certificate authority

1. First, install the organization's root certificate on client computers.
2. In Web Admin, in the left pane, click **System**.

3. In the right pane, click **TLS/SSL Certificate**.

4. Under **Certificate**, click **Upload**. In the **Upload Certificate** dialog box, select **Upload root certificate**.

5. Click **File name**, and select the trusted root certificate, and then click **Ok**.

6. Second, create your signed response certificate. Under **Signing Request**, click **Create**. The **Create Signing Request** dialog box opens.

7. In the **Common name** box, enter the unique, fully qualified domain name of the IIS server.

8. Enter the identifying organizational information in the **Organization**, **Organizational unit**, **City/Locality**, **State/Province**, and **Country/Region** boxes, and then click **Ok**.

9. Third, after the certificate is prepared by your private certificate authority, install the signed response certificate on the IIS server. Under **Certificate**, click **Upload**. In the **Upload Certificate** dialog box, click **File name**, and select the signed response certificate.

10. Select **Upload signed response**, and then click **Ok**.

11. Under **Security**, click **Change**. In the **Change Security** dialog box, select the root certificate, and then select the **Use TLS/SSL** check box.