

OPENTEXT

OpenText RightFax 10.6
Connector for Microsoft Exchange

Administrator Guide

Edition

OpenText RightFax 10.6 Connector for Microsoft Exchange.

This document was last updated January 22, 2014.

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Chapter 1: Configuring the RightFax Microsoft Exchange Gateway

Overview

The Connector for Microsoft Exchange consists of software components that are installed on the RightFax server and the Exchange server. Or, for Exchange 2010 SP2 or later, you can use the Exchange Web Services option that does not require installing software on the Exchange server. A brief description of each component follows:

The **RightFax Microsoft Exchange Gateway** is a configurable RightFax service that functions as a communication link between RightFax and Exchange. You must enable one or more gateways on a RightFax server. The gateway is installed on the RightFax server and is configured by using Windows Control Panel.

The **RightFax Connector for Exchange** is an Exchange service that handles all communication between the Exchange and RightFax servers. The connector service is installed on Exchange server and is configured by using Windows Control Panel.

As an alternative to the RightFax Connector for Exchange, the **RightFax Exchange Web Services (EWS) Connector** is a RightFax service that handles all communications between Exchange and the RightFax server. The EWS Connector is installed on the RightFax server and is configured by using

Windows Control Panel. (Works with Exchange 2010 SP2 or later only.)

The **RightFax advanced form for Outlook** allows Microsoft Outlook clients to create and send faxes from a RightFax advanced form built into and launched from Outlook. The advanced form includes a fax viewer.

When you install the RightFax advanced form for Outlook, a custom fax button is added to the Outlook toolbar so users can easily create and address new faxes.

The **RightFax Synchronization Module** allows RightFax administrators to create and synchronize users from Active Directory domains, groups, and organizational units. An Exchange-specific profile is included with the synchronization module and maps Active Directory and Exchange user attributes to RightFax user attributes. For more information, see the *RightFax Administrator Guide*.

Supported versions

Connector for Microsoft Exchange supports the following versions of Microsoft Exchange on Windows Server 2008 or later, depending on which connector option you choose.

With the RightFax Connector installed on the Exchange server:

- Microsoft Exchange 2007
- Microsoft Exchange 2010
- Microsoft Exchange 2013

With the RightFax EWS Connector installed on the RightFax server:

- Microsoft Exchange 2010 SP2 or later
- Microsoft Exchange 2013

Licensing and activation

The Connector for Microsoft Exchange is included in the RightFax setup program but must be installed and activated before you can use it.

To activate the Connector for Microsoft Exchange, license a RightFax server type that includes this module, or license this module separately. For information on installing and activating new components, see the *RightFax Installation Guide*.

Adding and configuring the RightFax Microsoft Exchange Gateway Service

To add and configure the Gateway

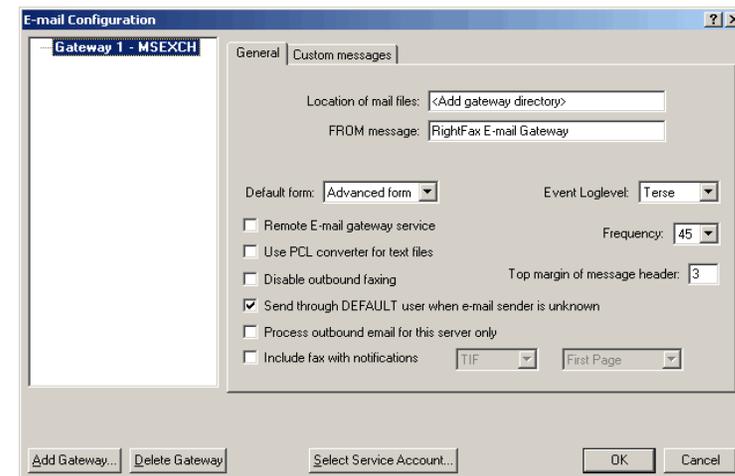
1. Log on to the RightFax server as an Administrator.
2. In Windows Control Panel, double-click **RightFax Email Gateway**.
3. To add a gateway, in the **Email Configuration** window, click **Add Gateway**.
4. In the **Email Gateway Selection** window, in the list of gateways, click **Microsoft Exchange**, and then click **Select**.

Tip You can install multiple email gateways. Each gateway is listed in the tree in the left pane, and separately configured to work with your Exchange server and your network environment. To view its configuration options, click a gateway in the list.

5. Click **MSEXCH** to view the configuration options for the RightFax Microsoft Exchange Gateway service.
6. Configure the gateway service using the options described in the next section. When finished, click **OK**.

Configuring the options on the General tab

On the **Email Configuration** window, click the **General** tab.



Location of mail files

What you enter here depends on whether you are using the RightFax Connector installed on the Exchange server, or the RightFax EWS Connector.

RightFax Connector:

In the **Location of mail files** box, enter the the UNC path to the message transfer directory located on your Exchange server.

The message transfer directory is a Windows folder created when the RightFax Connector for Exchange is installed on the Exchange server. After installing the RightFax Connector, share the message transfer directory and grant the email gateway service account (see [Selecting a service account on page 9](#)), share access and the security permission of "modify." You can specify any folder on the Exchange server, but the default location `\\<Exchange Server>\RFaxGate` is recommended.

EWS Connector:

In the **Location of mail files** box, enter `c:\RFaxGate`. This is the recommended location for the EWS connector on the RightFax server. The gateway service account must have "modify" permission on this folder. (See [Selecting a service account on page 9](#).)

FROM message

Enter a descriptive name that appears in the **From** field of all inbound documents sent to Exchange from the Fax Server.

With the RightFax EWS Connector, this field is not used.

Default form

Choose **Advanced form** to show the RightFax form for Outlook as the default for all users sending email. Choose **None** to show only the standard Outlook messaging window.

Remote Email gateway service

Allows the email gateway processes to execute on a remote computer rather than on the local computer. It also prevents the email gateway service from being started by the RightFax server, so select this box if you intend to run the gateway remotely. For more information on running the gateway

remotely see [Running the RightFax Microsoft Exchange Gateway Service Remotely on page 9](#).

Use PCL convertor for text files

Select this option to allow messages that contain Fax Server embedded codes (see [E-mail Compatible Embedded Codes on page 41](#)). This option also enables a specialized PCL conversion engine to convert email messages to fax format. This method produces the most accurate representation of ASCII text. If you notice that email messages are not converting to fax format as accurately as you expect, clear this box to return to using the native document conversion engine.

Disable outbound faxing

Prevents Outlook clients from sending mail messages to fax addresses. When you select this option, the Connector for Microsoft Exchange only routes received faxes and notifications to Outlook clients.

Send through DEFAULT user when email sender is unknown

If the Outlook sender does not have a RightFax account, this option specifies that the RightFax "Default" user ID will be used to send the fax. The cover sheet will include the sender's email address.

If this option is not selected, faxes sent from Outlook clients that have no matching RightFax user ID will not be sent.

Process outbound email for this server only

This option is only for use in organizations that use multiple RightFax Exchange Gateways. In a multiple gateway environment, each gateway can process faxes.

If enabled, this option restricts all other gateways from processing faxes sent from Outlook clients using the RightFax form. Disabling this option allows all RightFax Exchange

Gateways within your organization to process RightFax email. For more information, see [Configuring processing timeouts with multiple gateways](#) on page 13.

Include fax with notifications

This option applies to notifications of successfully sent faxes and faxes that failed to send. Select the check box to include a viewable copy of the fax with these types of notifications and specify the format of the copy:

- Select **TIF** or **PDF** format.
- Select **First Page** to include a copy of the first page only or **All Pages** to include a copy of all pages.

Event Log level

Select the level of information logged in the Application Event Log under the service name "RightFax Email Gateway Module."

You can select the following options:

- **None.** No information is saved.
- **Terse.** Records critical errors only.
- **Normal.** Records errors and major events only.
- **Verbose.** Records all significant events and is most useful for tracking and resolving problems.

Caution If you leave this value set to "Verbose" for long periods of time, the Event Log can become full which may prevent new events from being logged.

Note If you have a problem that can be duplicated, set the LogLevel for all RightFax server applications temporarily to **Verbose** and go through the steps to duplicate the problem.

Frequency

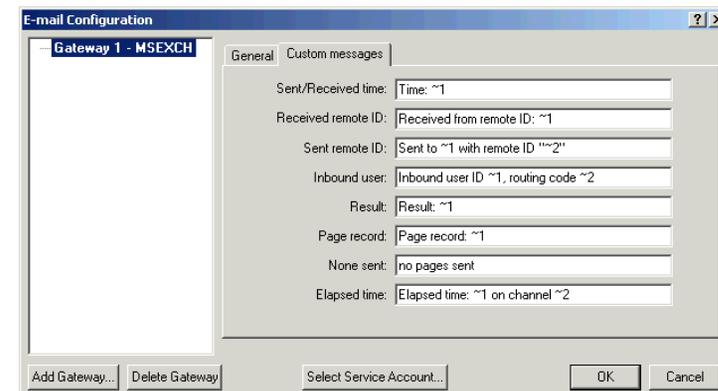
Sets the interval, in seconds, between checks to the Exchange server and the Fax Server for work to do (such as received faxes to route or email to convert to faxes). Decreasing this value is not recommended. It increases the load on the fax server.

Top margin of message header

Enter the number of lines to add to the top margin of mail messages when converting to fax format. Adding a few lines to the top margin prevents some plain paper fax machines from cutting off the top of the message.

Configuring the options on the Custom Messages tab

When a fax is received as an email attachment and when an email notification about the status of a fax is received, the received mail message includes one or more customizable messages providing information about the status of the fax. To customize the text of these messages, click the **Custom Messages** tab.



Each message lets you combine text with one or more variables. Each message has its own available variables, described in the following table.

| Notification message | Variables |
|----------------------|--|
| Sent/Received time | ~1 = Date (in Windows locale format) and time (HH:MM) |
| Received remote ID | ~1 = Remote ID |
| Sent remote ID | ~1 = The destination fax number ~2 = The destination remote ID |
| Inbound user | ~1 = The RightFax user ID of the fax recipient ~2 = The fax recipient's routing code |
| Result | ~1 = The result code and any accompanying text as reported by the fax board (These codes and messages differ depending on your fax board type) |
| Page record | ~1 = The range of page numbers successfully sent or received |
| None sent | None. |
| Elapsed time | ~1 = The total fax processing time the fax board showed (MM:SS) ~2 = The fax channel used to send or receive the fax. |

Selecting a service account

Add a service account to run the gateway service. This account must be a domain user that belongs to the local admins group on the RightFax server. Adding an account

without these requirements may prevent the gateway from starting, or from accessing the message transfer directory if you are using the RightFax Connector on the Exchange server.

If you are using the EWS connector, the service account must have "modify" permission on the location of mail files that you specified on the General tab.

To change the gateway service account

1. In Windows Control Panel, double-click **RightFax Email Gateway**.
2. In the **Email Configuration** window, click **Select Service Account**.
3. In the **RightFax Service Account Editor** window, next to the Gateways Service Account box, click **Modify**.
4. Select **This account**, and in the box, type the service account information using the format of: *Domain\User Account* or *Local Computer\User Account*.
5. Enter the password for the selected user account in both the **Password** box and the **Confirm Password** box.
6. Click **OK** to apply the new service account.

Running the RightFax Microsoft Exchange Gateway Service Remotely

By default, the RightFax Microsoft Exchange Gateway service runs on the RightFax server. You can run the Exchange Gateway service on a different machine under these conditions:

- You want to decrease the workload on the Fax Server.
- You anticipate a high volume of gateway traffic and do not want the added workload to interfere with the routine operation of the Fax Server.

To run the RightFax Microsoft Exchange Gateway service remotely

1. On the Fax Server, in Windows Control Panel, double-click **Email Gateway**.
2. To add a new gateway:
 - a. Click **Add Gateway**. Select **Microsoft Exchange** and click **Select**.
 - b. Select the new gateway in the pane on the left and select the **Remote Email gateway service** check box.
 - c. In the **Location of mail files** box, enter the UNC path of the RightFax\Gateway folder (for example, \\Exchange Server\C\$\Program Files\RightFax\RFaxGate).
 - d. Click **Select Service Account**. Next to the Gateways Service Account box, click **Modify**. Make a note of the domain and user account used by your gateways. For security purposes, the password for the user account is not shown, but have the user name and password on hand for later steps.
 - e. Click **Cancel** to close the **Service Account** dialog box, and click **OK** to save and close the **Email Configuration** dialog box.
3. Add the gateway user account you noted above to the

Administrators group on both the RightFax server and the remote Email Gateway computer.

4. Log on to the remote Email Gateway computer using the Email Gateway service account user name and password.
5. Map a drive to the administrative share for the drive where the RightFax server is installed (for example, \\RFSERVER\C\$).
6. Open a command prompt and change to the RightFax\Bin folder on the drive you mapped and enter the following command:


```
addsrv RFEMAIL#"RightFax Remote Gateway# Module""\RFSERVER\C$\Program Files\RightFax\Gateway\EXCHGateway.exe"
```

Where # is the number of the Email Gateway you added on the RightFax server, and RFSERVER\C\$ is the name of the administrative share on the RightFax server. When complete, the message "Create Service Success" appears.

Close the command prompt window.
7. Open Windows Control Panel, click **Administrative Tools**, and start the **Services** program.
8. In the list of services, double-click "RightFax Remote Gateway# Module" (Where # is the Email Gateway number). This opens the **Properties** dialog box.
9. Under **Startup Type**, click **Automatic**.
10. Under **Log on as**, select **This account**, and then click the browse button to open a dialog box listing available user accounts.
11. Open a list of user IDs on the Email Gateway service

account domain, and double-click the Email Gateway service account user ID you noted earlier. Click **OK** to return to the **Services** dialog box.

12. In the **Password** and **Confirm Password** boxes, type the password for the selected service account. Click **OK**, and then click **Close**.
13. Close Windows Control Panel.
14. Open the registry editor and navigate to
HKEY_LOCAL_MACHINE\System\CurrentControlSet
\Services\GATEWAY#
Where # is the number of the Email Gateway.
15. On the **Edit** menu, click **New**, and select **String Value**. Type **AppParameters** and press Enter to name the new registry key.
16. Double-click the new AppParameters key to open the **Edit String** dialog box. In the **String** box, enter:
-fRFSERVER -sgateway# -
L\\RFSERVER\C\$\Progra~1\RightFax
Where *RFSERVER* is the name of the RightFax server, # is the Email Gateway number, and
\\RFSERVER\C\$\Progra~1\RightFax
is the UNC path to the RightFax folder on the RightFax server. (The short name format is required.)

Note Multiple email gateways are sequentially numbered, beginning with the second gateway listed in the Email Gateway Configuration. If you are configuring the first email gateway shown in the Email Gateway Configuration to run on a remote server, the number sign (#) shown in the syntax above is NOT required. This is also true if your Fax Server is configured for a single Email Gateway.

17. In the registry editor, navigate to HKEY_CLASSES_ROOT and add a new key called RightFax.
18. Under the RightFax key, add a new key called Server.
19. Add a new string value to the Server key called Path. In the **Data** value box enter the UNC path to the RightFax\Shared files folder on the RightFax server (for example, \\RFSERVER\C\$\Program Files\RightFax\Shared files).
20. Close the registry editor.
21. Run the **Services** program from Windows Control Panel.
22. Select the "RightFax Remote Gateway# Module" service. If the service is running, click **Stop**. When the service is stopped, click **Start**. The Fax Server will now begin using the remote Email Gateway service.

Troubleshooting the RightFax Microsoft Exchange Gateway

If you experience problems with your RightFax Microsoft Exchange Gateway service, check for errors in the Application log of the Windows Event Viewer.

To open the Event Viewer, click **Start > Programs > Administrative Tools > Event Viewer**.

In the Event Viewer, click **Application** from the **Log** menu to open the Application log. Email gateway-related problems will appear on the log in the **Source** column as "RightFax Email Gateway Module." Double-click the entry for a description of the error.

The information saved to the Event log is determined by the **LogLevel** setting in the RightFax Email Gateway configuration program (see Event Log level in [Configuring the options on the General tab on page 6](#)). With the log level set to **Terse**, only critical errors are recorded. Log levels **Normal** and **Verbose** record more information that help track down problems.

Running the RightFax Microsoft Exchange Gateway service in the Command Prompt window also gives a detailed account of what is happening with the gateway.

To run the gateway in the Command Prompt window

1. Open Enterprise Fax Manager.
2. In the list of RightFax services, right-click RightFax E-mail Gateway and choose **Debug**. The Command Prompt window opens.

To output debug information to a text file

1. Stop the RightFax Email Gateway Module service.
2. Open The Command Prompt window.
3. Change to the RightFax\Gateway folder on the RightFax server and enter this command:

```
exchgateway -d -1 -sgateway# >file.txt
```

Where # is the number of the email gateway. This number is zero-based, so your first email gateway is referred to as "gateway," your second email gateway is referred to as "gateway1," and so on.

To confirm the gateway number, open the Windows registry and check the Gateway keys under HKEY_LOCAL_MACHINE\SOFTWARE\RightFax\Gateways (64-bit: HKEY_LOCAL_MACHINE\Software\Wow6432Node\RightFax\Gateway).

Example

```
exchgateway -d -1 -sgateway >file.txt
```

When running the email gateway in the Command Prompt window, set the window properties to allow you to scroll backwards some distance. To set the Command Prompt window to sufficient size, click the Command Prompt icon in the top left of the Command Prompt window. Click **Properties** to open the **Command Prompt Properties** dialog box. Click the **Layout** tab, and set **Screen Buffer Size** height to 2000.

4. To stop debug and view your output, press Ctrl + C on your keyboard. Open the output file located in the \RightFax\Gateway folder.

Configuring processing timeouts with multiple gateways

When multiple RightFax gateways are in use, you can restrict a gateway to process faxes for a single RightFax server.

When this option is enabled, other gateways ignore the message in the drop directory until the specified gateway picks it up, or when a specified timeout elapses, whichever

comes first. After the timeout, any gateway can process the fax. This process delays faxes up to 20 minutes.

To specify the duration of the timeout, edit the Windows Registry.

To set the gateway processing timeout period in minutes

1. On the RightFax server, run the Windows Registry Editor and browse to the subkey:
HKLM\Software\RightFax\Gateway\Gateway
2. Set the PulseFileTimeout value to 0.
3. Create a new DWORD entry called ProcessingTimeout.
4. Enter the time (in minutes) to wait before allowing any gateway to process faxes.

Setting this value to zero always allows any gateway to process faxes.
5. Save and close the Windows Registry Editor.

Resolving error messages

Error 53

This is a Windows networking error indicating that the UNC name specified for the **Location of Mail Files** in the gateway configuration is invalid or unavailable. If the specified path is correct and valid, the account being used to start the RightFax Email Gateway Module service does not have access rights to that folder.

Error 85 The local device is already in use

This is a Windows networking error. The drive where RightFax is connecting the UNC name for the **Location of Mail Files** or **API Files** is already assigned.

Faxes are going out, but no email notifications are being sent

Normally, users who send faxes via mail do not have a RightFax account and the faxes are routed through the RightFax Default fax mailbox.

When a fax goes out, RightFax tries to notify the user of the fax status. Because the fax went through the Default fax mailbox, RightFax notifies the network user Default, not the sender.

Cannot access inbound/outbound folder

The folder entered as the **Location of In/Out Directories** box on the **RightFax Connector** dialog box is invalid. The path specified does not exist, does not use proper UNC naming conventions, or is misspelled. Possibly, the user account specified for the RightFax Connector Service on the Exchange server does not have administrative access to the specified folder.

Error resolving destination mailbox: *MailBoxName*

An incoming fax from the Fax Server is converted incorrectly, usually because the user's **Routing Info** box in Enterprise Fax Manager does not match a user email address. Match the user's routing information to the user's Exchange Distinguished Name.

Chapter 2: Installing and Configuring the RightFax Connector

This chapter applies to the RightFax Connector installed on the RightFax server. If you want to use the RightFax EWS Connector instead, see [Installing and Configuring the EWS Connector](#) on [page 23](#).

Architectural overview

After installing and configuring the RightFax Microsoft Exchange Gateway on the RightFax server, install and configure the RightFax Connector for Exchange on the Exchange 2007 or 2010 Server.

The Connector is a Windows service that runs on Exchange Hub Transport servers using a Windows service account (the local system).

The connector service is one file (RFXchConn.exe) that directs RightFax messaging through Exchange. The connector is configured using **RightFax Exchange Connector** in the Control Panel.

About the RFXGate folder

The connector installation creates a folder on Exchange servers called RFXGate that contains two subfolders (IN and OUT). Both subfolders contain the heartbeat file, pulse.txt.

The default location of the RFXGate folder is \Program Files\RightFax.

The RFXGate folder and subfolders IN and OUT are used by both the connector and the Exchange Email Gateway (on the RightFax server) to process outbound and inbound faxes.

- The connector writes the pulse.txt file to the RFXGate\IN folder, and to ensure the gateway is running, verifies that the pulse.txt file is updated in the \RFXGate\OUT folder.
- The Exchange Email Gateway Module writes the pulse.txt file to the \RFXGate\OUT folder, and to ensure the connector service is running, verifies that the pulse.txt file in the RFXGate\IN folder is updated within the specified time interval (45 seconds by default).

Outbound faxing workflow

Outbound faxing process from a Microsoft Outlook client

1. A user addresses a fax using a format that is recognizable by the connector (see [Manually addressing Outlook messages to fax destinations](#) on [page 32](#)).
 - The subject of the email is converted to the notes field on the fax cover page, and the body of the email is the first page of the fax.

- Any attachments are converted and shown as additional fax pages.
2. The connector processes the fax and creates temporary files (listed below) that are placed in the \RFaxGate\OUT folder.
 - HXXXXXXXXX.tmp includes fax header information.
 - MXXXXXXXXX.tmp includes the message body and the first page of the fax.
 - AXXXXXXXXX.tmp includes attachments that are converted to additional fax pages.
 3. The Exchange Email Gateway module on the RightFax server scans for and processes new messages in the \RFaxGate\OUT folder.
 4. The gateway module notifies the RightFax Server module of a new outbound fax document and prepares the document for faxing.

Inbound faxing workflow

Inbound faxing process with Exchange 2007 or 2010

1. A fax is received into RightFax and matched to a recipient in the RightFax database.
2. If the user record in the database is associated with a routing type of Exchange, the system creates three temporary files:
 - HXXXXXXXXX.tmp includes fax header information.
 - MXXXXXXXXX.tmp includes the message body and the first page of the fax.

- AXXXXXXXXX.tmp includes attachments that are converted to additional fax pages.
3. The *.tmp files are moved by the Exchange Gateway into the \RFaxGate\IN folder on the Exchange server.
 4. The connector then passes the files to Exchange for processing.

Installing the RightFax Connector for Exchange

To verify that your RightFax Connector for Exchange installation goes smoothly and to avoid unnecessary delays, it is important to perform each step in the installation completely and correctly before proceeding to the next step.

To install the RightFax Connector

1. Log on to the computer using a Windows Administrator account that is a member of the **Exchange Organization Management** group. This role is required because the Connector is installed as a Foreign Connector to Exchange.
2. Run **Setup.exe**. The RightFax Product Suite Setup wizard opens.
3. The connector requires Microsoft .NET Framework 4.5. If this software is not installed on your system, Setup prompts you to install it.
 - To install, click **OK**.
 - To cancel Setup and install .NET Framework 4.5 yourself, click **Cancel**.
4. Review the welcome screen and click **Next**.
5. Carefully read and accept the license agreement and

click **Next**.

6. Select the **RightFax Exchange Connector Setup** component and click **Next**.
7. The **Preview Requirements** step lists third-party software required by the Exchange Connector and also lists the status of setup operations. Required software has a status of *Not Installed*. To continue, click **Next**.
8. To apply your settings and install required third-party software, click **Apply**. This may take several minutes. When finished, click **Next**.
9. To install RightFax software, click **Next**, and then click **Apply**. This may take several minutes.
10. When prompted, enter a Windows account to run the connector service, and then click **OK**.
The account you choose must:
 - Have access to the domain.
 - Be a member of the Organization Management group.
 - Have the right to log on as service on the local computer.
11. In the **RightFax Exchange Connector Configuration** window, click the button next to the **NDR Mailbox** field.
12. In the pop-up window, enter a valid Exchange mailbox used by the connector to deliver errant email, and then click **OK**.

Note Entering an invalid account halts the connector installation.

13. To complete the Exchange Connector installation, click

Next, and then click **Close**.

14. To enable the RightFax Gateway to communicate with the connector, share the \Program Files\RightFax\RFaxGate folder.

Set the share access permissions to include the Windows service account used to run the Exchange Email Gateway on the RightFax server. This account must have **Change** access to the share and the security permission of **Modify**.

Configuring the RightFax server to work with the connector

After installing the connector software on the Exchange server, configure the Exchange Gateway on the RightFax server.

To configure the Exchange gateway

1. Log on to the RightFax server as an administrator.
2. In Windows Control Panel, double-click **RightFax Email Gateway**.
3. On the **General** tab, in the **Location of mail files** box, enter the location of the message transfer directory you specified during the connector installation.

If you accepted the default folder location during the connector installation on the Exchange server, this is the \ExchServer\Program Files\RightFax\RFaxGate folder.

Configuring the RightFax Connector on the Microsoft Exchange Server

After the connector is installed, you can customize the connector configuration settings using the RightFax Exchange Connector control panel program.

To configure the RightFax Connector for Microsoft Exchange

1. In Windows Control Panel on the Exchange server, right-click **RightFax Exchange Connector**, and then click **Run as**.
2. In the RightFax Exchange Connector configuration window, configure each of the following:
 - [General options](#) on page 18.
 - [Address Space information](#) on page 19.
 - [Logging messages](#) on page 19.

General options

Exchange Install Directory

The folder where Exchange 2007, 2010, or 2013 is installed.

Gateway Directory

The Gateway Directory stores the mail messages that are en route to the RightFax server and fax image files that are en route to the Exchange server. Specify a Gateway Directory for each RightFax server that the RightFax Connector for Exchange communicates with. The Gateway Directory is a local folder on the Exchange server, and is specified as a local file path (for example, C:\Program Files\RightFax\RFaxGate).

Drop Directory

Each foreign connector installed on an Exchange server that does not transmit messages via SMTP uses a Drop directory for outbound messaging. Messages sent to the address space specified in the RightFax Exchange Connector configuration (RFAX by default) are placed into the connector's Drop directory where they are processed by the connector and passed to the Gateway Directory. The default location of the connector's Drop directory is on the Exchange server at \Program Files\Microsoft\Exchange Server\RightFax Exchange Connector.

Pickup Directory

Inbound messages taken from the \Gateway\In folder are processed by the connector and placed into the Exchange Server Pickup directory. The default location of the Pickup directory is on the Exchange server at \Program Files\Microsoft\Exchange Server\Transport Roles\Pickup.

Caution The pickup directory is an Exchange folder used by all foreign connectors. It should not be deleted, modified, or moved.

NDR Mailbox

Select an Exchange mailbox that receives undeliverable fax messages. This field is required by the connector, and is populated with a valid Exchange mailbox.

Source Transport Servers

Specifies Exchange Transport servers to route faxes to and from the RightFax Exchange Connector. Click the browse button to select from available Transport Servers.

If you specify multiple transport servers, configure the directories to allow the servers to share the files. See [Configuring multiple source transport servers](#) on page 21.

Message size

Click **No limit** to accept and forward messages of all sizes to the fax server. Click **Maximum (KB)** to specify the maximum file size of messages that the Exchange server passes to the fax server. Enter the maximum file size in kilobytes. Messages that exceed this file size is not forwarded to the fax server.

Caution By default, the Exchange Transport service is configured with a 10MB message size limit. If your organization sends or receives faxes that are greater than 10MB, set the Maximum receive size or Maximum send size limit on the Exchange Transport service settings to a value greater than the largest sent or received document. Messages greater than the message size limit generate an NDR message and are not processed. Inbound faxes are lost if their total size exceeds message (receive) size limits, and the recipient RightFax user is configured (in RightFax) with the option to **Delete After Routing**. For information on configuring Exchange message size limits, see Microsoft documentation.

Address Space information

Add, edit, or remove an address space

This is a list of the Exchange address spaces that are routed to the fax server. All messages within the address spaces specified here are routed to the fax server. By default, messages with the RFAX and FAX address spaces are routed by the connector.

An asterisk indicates that all address formats are accepted for this address type. Address spaces other than "FAX" must use the RFAX: format on address spaces other than "FAX." For more information about addressing formats, see

[Manually addressing Outlook messages to fax destinations on page 32.](#)

A cost value (1–100) for messages with this address type is relevant when using two or more Fax Servers. Exchange routes messages to the RightFax server with the lowest cost value.

Connector scope

- Select **Entire Organization** to enable the connector for all Exchange servers on your network.
- Select **AD Site** to enable the connector for a specific routing group.

Logging messages

The Logging tab allows RightFax administrators to control the types of messages logged by the connector. Each of these messages can be customized using categories and a corresponding logging level. By default all output is written to the Windows Event Viewer Application Log.

Logging Categories

- ExchConnInbound logs inbound (fax-to-email) processes.
- ExchConnManager logs connector manager events that are associated with in- and outbound sub-processes.
- ExchConnOutbound logs outbound (email-to-fax) processes.
- RightFax Tools logs events associated with the connector configuration control panel.

Logging Output

Select the level of information logged in the Application Event Log under the service name "RightFax Exchange Connector."

- **Off** does not record information to the Event Log.
- **Error** records only critical errors.
- **Info** records informational events (such as normal starting and stopping of the connector), warnings, and errors.
- **Verbose** records all events and is most useful for tracking and resolving problems. If you leave this option set to Verbose for long periods of time, the Event Log can become full quickly, missing new event logs.
- **Warning** records only critical errors and warnings.

Changing the Connector Service Account

The RightFax Exchange Connector runs as a local service (RFExchConn.exe) on Exchange servers. The Windows local system account is used to run the connector service by default, but can be changed if necessary. All account types require read access to the Drop directory, read and write access to Pickup directory and Gateway directory, and must have permission to logon as a service.

To change the connector service account

1. To change the service account, click **Service Account**. The Service Account dialog box opens.
2. Select **This account**.
3. Type the service account information using the format: *Domain\User account or Local Computer\User account*.
4. Enter the password for the selected user account in both the **Password** and **Confirm Password** boxes.
5. Click **OK** to apply the new service account.

Configuring multiple source transport servers

For high availability or load balancing, you can specify more than one Exchange Transport Server on the General tab in the RightFax Exchange Connector control panel.

To share a drop directory among the transports:

- Create a shared folder
- Configure the path to the shared folder

Creating a shared folder

1. Create the drop directory folder (in the following examples, C:\DROP\RFDROP).
2. Set the sharing properties for the folder to grant Everyone full control, change, and read permissions.
3. Set the security properties for the folder to grant NETWORK SERVICE full permissions.

Configuring the path to the shared folder

Use the Exchange Management Shell program to configure the TransportServer and the RightFax Foreign Connector with the path to the shared drop directory you created.

To configure the path to the shared folder

1. From the command prompt, run the **Exchange Management Shell** program.
2. Set the transport path with the following command:

```
Set-TransportServer <HubTransportName> -
  RootDropDirectoryPath <Path or UNC Path>
```

Default values for the transport path:

- For Exchange 2007, C:\Program Files\Microsoft\Exchange Server
- For Exchange 2010, C:\Program Files\Microsoft\Exchange Server\V14
- For Exchange 2013, C:\Program Files\Microsoft\Exchange Server\V15

Example: `Set-TransportServer <EXCH2010> -
 RootDropDirectoryPath <\\exch2010\DROP>`

3. Set the foreign connector drop directory with the following command:

```
Set-ForeignConnector
  "ForeignConnectorName" -DropDirectory
  "DropDirectoryName"
```

Example: `Set-ForeignConnector "RightFax Exchange
 Connector EXCH2010" -DropDirectory "RFDROP"`

4. Restart the RightFax Exchange Connector and send a test email.

Synchronizing users from Active Directory to RightFax

All user synchronization between the RightFax server and Exchange 2007, 2010, and 2013 environments is managed by the RightFax Sync Module.

XML-based transform files (for synchronizing user information with RightFax) are available for Exchange 2007, 2010, and 2013 environments.

For information on user synchronization, refer to the *RightFax Administrator's Guide*.

Troubleshooting the RightFax Connector for Exchange

If you experience problems with your RightFax Connector for Exchange, check for errors in the Application log of the Windows Event Viewer.

To check for errors in the Application log of the Event Viewer

1. To open the Windows Event Viewer, select Start > Programs > Administrative Tools > Event Viewer.
2. In the Event Viewer, select Application from the Log menu to open the Application log.
Connector-related problems appear on the log under the Source column as "RightFax Exchange Connector."
3. Double-click the entry for a description of the error.
The information saved to the Event log is determined by the Logging output setting in the RightFax Connector configuration program.
Set the log level to Verbose to record debugging output that helps isolate a particular issue.

Chapter 3: Installing and Configuring the EWS Connector

Instead of installing the RightFax Connector on the Exchange server (see [Installing and Configuring the RightFax Connector on page 15](#)), you can install the RightFax EWS Connector on the RightFax server.

The EWS Connector works with:

- Exchange Server 2010 SP2 or later
- Exchange Server 2013

The EWS connector requires that you set up transport rules on the Exchange server. With Exchange Server 2013 the connector can create the transport rules automatically. Otherwise, you can create the rules yourself.

Adding and configuring the RightFax EWS Connector

Before you configure the EWS Connector

1. Create a dedicated Exchange mailbox to which the transport rule will redirect fax emails for processing by the RightFax EWS Connector.
2. (Exchange Server 2013 only) To enable the connector to automatically create the transport rule enable Basic authentication for the PowerShell virtual directory in

IIS on the Exchange server. For information, see your Microsoft documentation.

To add and configure the EWS Connector

1. Log on to the RightFax server as an Administrator
2. In Windows Control Panel, double-click **RightFax EWS Connector**. The EWS configuration window appears.
3. In the **RightFax Mailbox** section, enter the Email Address, User name, and Password of the dedicated fax mailbox you created previously.
4. In the **NDR Mailbox** section, enter an Exchange mailbox that handles Non-Delivery Report (undeliverable) emails.
5. If you are using Exchange Server 2013 and want the connector to create the required transport rule for you, select the **Automatically Create Transport Rule** check box and enter the Exchange Administrator Credentials.
 - In the **Message Size** section, select **No Limit** to accept and forward messages of any size. To specify a size limit, select **Maximum**, enter a value in the text box, and select KB, MB, or GB from the list.
 - The default values are listed in the Address Space

section. You can add, edit, or delete address spaces. For more information, see [Address Space information](#) on page 19.

- If you want to create the transport rule manually, (required for Exchange 2010 SP2) clear the **Automatically Create Transport Rule** check box. For instructions, see [Creating a transport rule manually](#) on page 24.

Note The Gateway Directory shown in this window is set in the Email Configuration control panel item when configuring the Exchange Gateway.

Creating a transport rule manually

You must manually create the transport rule for Exchange Server 2010 SP2 or later. With Exchange Server 2013, you can choose to have the connector create the transport rule for you, or create the transport rule yourself.

Manually creating a transport rule in Exchange Server is a two step process in the **Exchange Management Shell** program, in which you create the foreign connector and then the transport rule.

To create a foreign connector

- From the command prompt, run the **Exchange Management Shell** program.
- Enter the following command:

```
New-ForeignConnector -name
"RightFaxConnector" -AddressSpaces
("RFAX:*;1", "FAX:*;1")
```

To create a transport rule

- From the command prompt, run the **Exchange Management Shell** program.
- To redirect faxes less than a specified size from RightFax addresses RFAX and FAX to a dedicated RightFax mailbox account, enter the following command, including the message size limit in KB, MB, or GB and the RightFax Mailbox domain and username:

```
New-TransportRule -Name "RightFaxRule" -
RecipientAddressMatchesPatterns @("RFAX-
\w*", "FAX-\w*") -ExceptIfMessageSizeOver
"<size of message>" -RedirectMessageTo
"<domain\RFmailbox username>"
```

For example, to redirect messages less than 5MB to the opentext\xadmin account, enter:

```
New-TransportRule -Name "RightFaxRule" -
RecipientAddressMatchesPatterns @("RFAX-\w*", "FAX-\w*")
-ExceptIfMessageSizeOver "5MB" -RedirectMessageTo
"opentext\xadmin>"
```

Note You can also create a transport rule through the Exchange Control Panel for Exchange 2010 SP2 or SP3 or through the Exchange Admin Center for Exchange 2013. For information, see your Microsoft documentation.

Chapter 4: Configuring Outlook users to send and receive faxes

The Connector for Microsoft Exchange supports these versions of Microsoft Outlook:

- Outlook 2007
- Outlook 2010
- Outlook 2013

Sending an Outlook mail message to a fax number is similar to sending email, except the message must be specially addressed.

Text entered in the **Subject** field in an Outlook mail message appears in the Notes section of the cover sheet.

Text entered in the body of the email appears as the body of the fax.

Attached files are converted to fax images and added to the fax (see [File Formats that Convert to Fax Format](#) on [page 39](#)). Unsupported file attachments cannot be converted and will be ignored.

Important UTF-8 encoding (unicode) is required for the Euro symbol and some other special characters to appear properly in RightFax documents created in Microsoft Outlook. To support documents with these characters, Configure Microsoft Outlook for UTF-8 encoding. See the documentation for Microsoft Outlook for information.

Installing the RightFax Form for Outlook

RightFax provides a custom form for your Microsoft Outlook users that expands and simplifies the process of sending and receiving faxes with Outlook.

Features such as an embedded fax viewer and billing code lookup tables allow Outlook to act as a truly unified messaging client for your users.

With the RightFax form for Outlook (also called the RightFax Advanced form or Advance Faxing Options), users can:

- Look up and enter billing information.
- Send a cover sheet.
- Specify conversion options for PowerPoint, Excel, and Visio documents.
- Elect to preview a fax before sending, request a callback, and use smart-resume.
- Specify the resolution of the fax image.
- Select defaults for conversion options, cover sheets, and other sending information.

The RightFax form for Outlook is installed on each Outlook client computer as a component of the RightFax client installation (described in the *RightFax Installation Guide*).

If you choose to not install this form on each individual client workstation, Outlook clients can still send faxes via RightFax using one of two custom addressing formats. For more information on these fax addressing formats, see [Manually addressing Outlook messages to fax destinations](#) on page 32.

The Outlook Fax Extension for Outlook 2007

The Outlook Fax Extension is installed as part of the RightFax form for Outlook. The extension adds a menu command and button to Outlook so that users can quickly address and send faxes. It also provides a command for viewing the status of faxes.

A button, **New Fax to Contact**, is added to the Outlook tool bar.



When the user clicks this button, a **Quick Fax Addressing** dialog box appears, relative to the user's RightFax configuration in Outlook (see [Configuring the Outlook Fax Extension](#) on page 26).

After the addressing dialog box is completed, the fax form opens for the user to supply the body of the fax message, attach files or library documents, and specify any desired fax transmission options.

The extension adds the menu command **Realtime Fax Status** to the **Actions** menu so that users can view the status of the faxes stored in the RightFax mailbox. This is useful for users who want to check the status of faxes sent to or from Outlook.

When this command is selected, a dialog box appears listing the folders and faxes in your mailbox.

- Click a folder name to view the faxes it contains.
- To view or delete the fax, right-click the fax entry to open a shortcut menu and select the appropriate menu option.
- Right-click in the fax list and click **Refresh List** to view the most current status of each fax.

Configuring the Outlook Fax Extension

Configure the Outlook Fax Extension individually on each Outlook client computer.

To configure the Fax Extension

1. On the client computer in Outlook, navigate to the **Tools** menu and select **Options**. The **Options** dialog box appears.
2. Click the **RightFax** tab and select the desired options.

Use Outlook fax addresses as RightFax addresses

Enables the gateway to send messages to Contacts who have a fax number only in the **Business Fax** field of their Contact information. If this box is not selected, use RightFax-specific fax addresses in the **Business Fax** field.

Remove "(Business Fax)" from cover sheet />display name

When faxing to Outlook clients, the name of the Contact information field where the fax number was retrieved (the **Business Fax** field) is automatically appended by Outlook to the fax recipient's name.

For example, your Outlook Contacts receive faxes addressed like this:

Jane Doe (Business Fax)

Select this check box to automatically remove this text from your fax cover sheets, leaving only the recipient's name in the **To** field.

Allow area codes in parentheses

Prevents Outlook from automatically converting numbers below 299 inside parentheses in fax-bound mail addresses to escape characters.

This check box must be selected if you want to send faxes via the RightFax Microsoft Exchange Module to area codes below 299.

Note Checking **Allow area codes in parentheses** prevents users from adding special characters to email addresses using escape codes.

Show Quick Fax Addressing dialog

When this option is selected, a **Quick Fax Addressing** dialog box appears each time you create a new fax in Outlook.

This dialog box lets you enter fax addressing information that is formatted automatically in the **To** line of your Outlook message.

Server options

Click this button to open a dialog that lets you specify the name of the RightFax server to connect to and your login information.

Create internet mail fax addresses

If you use the Outlook client with the SMTP/POP3 email gateway instead of the RightFax Microsoft Exchange Module, selecting this check box tells Outlook to create SMTP/POP3 compatible fax addresses instead of Exchange formatted addresses.

When this option is enabled, also enter the Internet mail address of the RightFax SMTP email gateway.

For example, if fax messages sent to the SMTP/POP3 gateway are formatted as:

fax=555-1212/pn=Jane.Doe@faxgateway.company.com,
this field must read:

faxgateway.company.com

Because this feature uses the IETF addressing convention, you must have the option **Use IETF Fax Addressing** checked in your SMTP/POP3 **Email Configuration** dialog box (described in the *RightFax Administrator's Guide*).

Sending Faxes with Outlook 2007

When users open the RightFax form for Outlook to send a fax (such as by clicking the **New Fax to Contact** button, described on [The Outlook Fax Extension for Outlook 2007](#) on page 26), the **Quick Fax Address** dialog box appears.

The screenshot shows the 'Quick Fax Address' dialog box with the following fields and values:

- Name: Jane Doe
- Fax Number: 555-1212
- Voice Number: 555-1000
- Company: Acme, Inc.
- City/State: Anywhere, USA

Buttons at the bottom: Done, Add Another >>, Cancel.

The user can enter all the required addressing information for one or more recipients. After adding one recipient, click **Add Another** to add additional recipients.

If RightFax is configured to send fax documents to email addresses or SMS numbers, you can select which of these delivery methods you want from a list.

Users can send a single document to any combination of fax, email, and SMS recipients. Email recipients receive an email message with the body of the fax as a separate file attachment. SMS recipients receive only the notes entered in the subject field of the email for the fax cover sheet.

After the information for all intended recipients is complete, click **Done**. The fax form opens, and the user can supply the body of the fax message, attach files or library documents, and specify any desired fax transmission options.

Note When sending faxes from Outlook, users can select fax recipients from the Outlook address book and Contacts list. In RightFax software, a name is limited to 99 characters. When faxes send successfully, the recipient name appears in distinguished name format in RightFax and on the fax cover sheet.

Sending faxes using the RightFax advanced form

When enabled, the RightFax Advanced form is available to users when they start a new email message. To access the Advanced Faxing Options, click **Show** in the Outlook 2007 ribbon, and click **Advanced Faxing Options**.

If the Advanced form is not enabled, users who want to send a fax through Outlook need to use the manual addressing scheme (see [Manually addressing Outlook messages to fax destinations](#) on page 32).

To send a fax

1. Select one of the following ways to use the RightFax form for Outlook to send a fax:
 - Click **New Fax to Contact**.
 - On the **Actions** menu, click **New Fax**.
 - To generate and send a new fax to a Microsoft Outlook Contact, click **Contacts** in your Outlook Folder List, select the contacts to receive the fax, and click **New Fax to Contact** on the tool bar.
2. The form appears addressed with the name and fax number of the contact.
 - The fax number is taken from the contact's **Business Fax** fields.
 - If the **Business Fax** field is empty, the **Home Fax** field is used.
 - If the **Home Fax** field is empty, the **Other Fax** field is used.

If available, the contact's company, city, state, billing information, and voice number are included in the fax

address on the cover sheet.

The Outlook Fax Extension for Outlook 2010 and 2013

Configure the Outlook Fax Extension individually on each Outlook client computer.

Note If the Outlook files are installed to a non-standard location, a prompt appears the first time each client software runs. Users must click **OK** to install the required files.

To configure RightFax Server

1. On the client computer in Outlook, navigate to the **File** menu and click **RightFax**.
2. Click **RightFax Server Options** to open the **Configure RightFax Server** dialog box.
3. Enter the name of the **RightFax Server** and specify whether the server requires NT Authentication.
4. Enter a valid **UserID** for the specified RightFax server.
5. Enter the password for the specified RightFax UserID.
6. Click **OK**.

Creating internet mail fax addresses

If you use the Outlook client with the SMTP/POP3 email gateway instead of the RightFax Microsoft Exchange Module, Outlook creates SMTP/POP3 compatible fax addresses instead of Exchange formatted addresses. When this option is enabled, enter the Internet mail address of the RightFax SMTP email gateway.

To create an internet mail fax address

1. On the client computer in Outlook, navigate to the **File** menu and click **RightFax**.
2. Click **SMTP Conversion Options** to show the **SMTP Conversion** dialog box.
3. Select the **Create internet mail fax addresses** check box.
4. Enter the name of the **Fax Gateway Internet Mailbox**.

For example, if fax messages sent to the SMTP/POP3 gateway are formatted as:

fax=555-
1212/pn=Jane.Doe@faxgateway.company.com,

this field reads as follows:

faxgateway.company.com

Because this feature uses IETF addressing convention, check the option **Use IETF Fax Addressing** in your SMTP/POP3 **Email Configuration** dialog box (described in the *RightFax Administrator's Guide*).

5. Click **OK**.

Sending faxes with Outlook 2010 and 2013

There are several ways to use the RightFax form for Outlook 2010 and 2013 to send a fax.

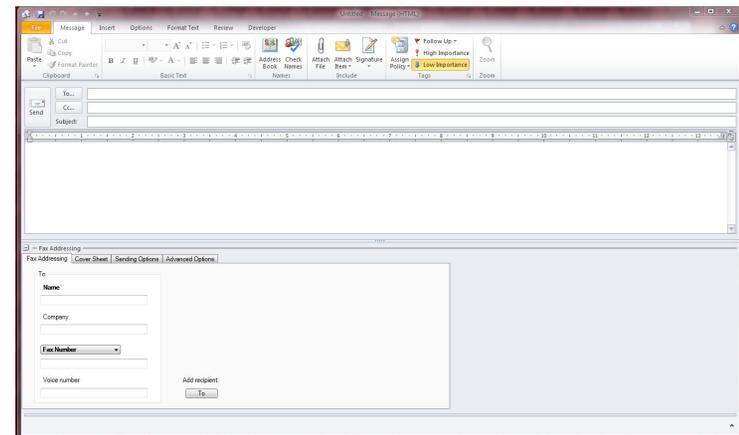
To send a fax

1. Start in either of these two ways:
 - Click the **Send a Fax** icon.
 - To send a new fax to a Microsoft Outlook Contact, click **Contacts** in your Outlook Folder List, select the contacts to receive the fax, and click **Send a Fax** on the tool bar.
2. The RightFax form appears with the selected contacts (if any) in fax addressing format on the **To** address line.
 - The fax number for each Outlook Contact is taken from the RightFax **Business Fax** field.
 - If the **Business Fax** field is empty, the **Home Fax** field is used.

- If the **Home Fax** field is empty, the **Other Fax** field is used.

If available, the contact's company, city, state, billing information, and voice number are included in the fax address on the cover sheet.

3. To enter a new recipient for the fax, enter a recipient's name and the destination Fax Number in the Fax Addressing region and click **To**. Repeat this step for each recipient of the fax.



4. Enter any of the optional information you want for the fax.
5. When complete, click **Send**.

Adding cover sheets in Outlook 2010 and 2013

These settings are all optional and apply to all recipients listed on the **Fax Addressing** tab.

To add a cover sheet to the fax

1. Click the **Cover Sheet** tab.

2. Click the **Use cover sheet** box.
3. Choose a cover sheet from the list. The same cover sheet is used for all the recipients.
4. Enter any of the optional From information. The same From information is used for all recipients.

Sending options in Outlook 2010 and 2013

These settings are all optional and apply to all recipients listed on the **Fax Addressing** tab.

To set send options

1. Click the **Sending Options** tab.

2. Enter the Billing Codes, if any, to be stored with the fax transmission record. Note that the Billing Codes field labels (such as **Account** and **Matter**) can vary depending upon your RightFax configuration).
3. To change the resolution of your transmitted document, you can select the **Fine mode** box. This improves legibility, but also increases file size and transmission time.
4. You can add library documents to your fax by clicking the **Add library document** button. A list of available documents appears. You can:
 - Highlight a document name and click the paper clip icon to show the name in the lower region of the dialog box and add the document to the fax.
 - Click the up or down arrow keys to change the order of selected documents.
 - Highlight a document name in the lower region of the dialog box and click the **Delete (X)** button to remove the document from the fax. (This does not remove the document from the library, only from the current fax.)
5. Select the **Hold for preview** check box to prevent the fax from transmitting immediately when you click **Send**. The held fax is released for transmission after you have previewed it.
6. If transmission is interrupted, RightFax attempts to resend the entire fax.

Click **Use smart resume** to resend only the pages of the fax that were not sent successfully in the first transmission.
7. You can specify a time for the fax to be sent by

selecting the **Delay send until** check box. Enter a future time and date in the appropriate fields.

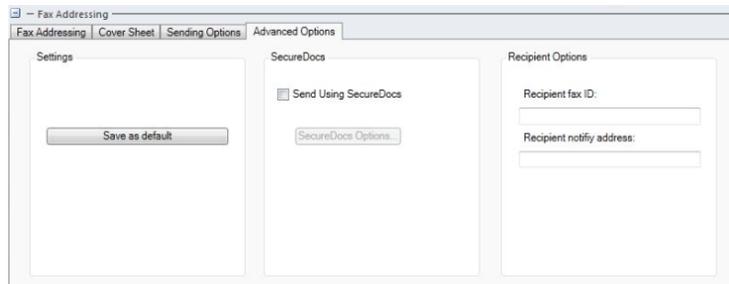
When you click **Send** for the current message, the fax is held and sent at the specified time.

Advanced Options in Outlook 2010 and 2013

These settings are all optional and apply to all recipients listed on the **Fax Addressing** tab.

To set addressing options

1. Click the **Advanced Options** tab.



2. Click **Save as default** to store all the settings you've entered for use in future fax transmissions.
3. SecureDocs allows you to create a fax and send it as encrypted Adobe® Acrobat® portable document format (PDF) files. To send a secure fax, select the **Send Using SecureDocs** check box and complete the required fields to specify passwords and functionality. See the *RightFax SecureDocs Guide* for more information.
4. You can restrict sending to only one fax machine by entering the CSID of the receiving machine in the **Recipient fax ID** field.

If the ID doesn't match, the fax is not sent. Leave blank to allow sending to any fax machine.

5. To send a text notification about this fax to the recipient's phone, enter their SMS number in the **Recipient notify address** field.

Leave blank to send no notification.

Troubleshooting Outlook 2010 and 2013

In some cases, where the Outlook 2010 or 2013 client loses connection with the RightFax server, you see this error message: "There are no name pipes instances" with an Outlook 2010 or 2013 message that extensions were not loaded.

To restore the extensions

1. From each affected client, open Outlook 2010.
2. On the **File** ribbon, choose **Options** to display a list of installed extensions.
3. Under **Add-ins**, click **Edit** for the COM add-ins and select the box for each disabled extension to re-enable it.

Manually addressing Outlook messages to fax destinations

Instead of using the RightFax form for Outlook:

- Outlook clients can address a fax by typing all the fax information (name, fax number, etc.) in the **To** field using one of two supported addressing formats.
- You can also create custom fax addresses in either your Personal Address Book or the Global Address List.

Using the FAX: addressing format

This is a simplified fax addressing type that lets users specify the destination name and fax number in the **To** field in Outlook.

Only the FAX address space can use this format. You can restrict the user's access to this addressing type in the Connector for Microsoft Exchange (see [Address Space information](#) on page 19).

Use the following format, and be sure to include the opening and closing square brackets:

```
[FAX:Name@FaxNumber]
```

Example

To send a fax from Outlook to Jane Doe at 555-1212, enter this address in the **To** field:

```
[FAX:Jane Doe@555-1212]
```

Using the RFAX: addressing format

This is an advanced fax addressing type that lets users specify the destination name and fax number in the **To** field in Outlook.

Custom address spaces use this addressing format. You can restrict users' access to this addressing type in the Connector for Microsoft Exchange (see [Address Space information](#) on page 19).

Use the following format, and be sure to include the opening and closing brackets.

```
[RFAX:Name@/FN=FaxNumber]
```

Example

To send a fax from Outlook to Jane Doe at 555-1212, enter this address in the **To** field:

```
[RFAX:Jane Doe@/FN=555-1212]
```

Additional parameters

You can also include one or more additional parameters.

Enter addressing parameters after the '@' symbol in the address. They can appear in any order.

The following table lists all fax destination parameters supported for Outlook.

| Parameter | Definition | Example |
|-----------|--|----------------|
| /AN= | Billing code 1 | /AN=1111 |
| /CI= | Recipient city/state | /CI=Tucson, AZ |
| /CO= | Recipient company name | /CO=Acme, Inc. |
| /FN= | Destination fax number | /FN=555-1212 |
| /MN= | Billing code 2 | /MN=2222 |
| /SMS | Send to an SMS number instead of a fax number (replaces the /FN parameter) | /SMS=555-1212 |
| /VN= | Recipient voice number | /VN=555-4567 |

Example

```
[RFAX:Jane Doe@/FN=555-1212/VN=555-4567/CI=Tucson, AZ/CO=Acme Inc./AN=1111/MN=2222]
```

Sending faxes using SecureDocs

When a document is sent using the optional SecureDocs module, it is saved as a file on your organization's Certified Delivery Web server.

The recipient is sent an email message with a link to the document. For information, see the *RightFax SecureDocs Guide*.

Sending SecureDocs messages with Outlook 2007

To send a document with SecureDocs, the user specifies an email address instead of a fax number for the recipient.

To address the fax by using the RightFax form

1. Enter the recipient's name and email address.
2. Click the **Convert SMTP Addresses To SecureDocs Recipients**.

The email address is converted to the proper format for sending via SecureDocs.

Sending SecureDocs messages with Outlook 2010 and 2013

To send a document with SecureDocs, the user specifies an email address instead of a fax number for the recipient.

To address the fax in the RightFax form

1. On the Fax Addressing tab, enter the recipient's name in the **Name** box. Click **email address** in the list, and enter the recipient's email address in the box.
2. Click the **Advanced Options** tab.

3. In the SecureDocs area, click **Send Using SecureDocs**. The email address is converted to the proper format for sending via SecureDocs.
4. To specify additional SecureDocs settings, such as PDF passwords, click **SecureDocs Options**.

For more information about these options, see the *RightFax SecureDocs Guide*.

Sending SecureDocs messages with the RFX addressing scheme

To send a SecureDocs message without using the RightFax form, enter the recipient's name and email address in Outlook's **To** or **Cc** boxes.

Note SecureDocs does not support blind copies (BCC).

Use the following syntax:

```
[RFX:Name@/SMTP=EmailAddress/SD]
```

Where *Name* is the recipient's display name and *EmailAddress* is the destination email address.

Example

To send a fax via Certified Delivery from Outlook to JaneDoe@Company.com, enter this address in the **To** field:

```
[RFX:Jane Doe@/SMTP=JaneDoe@Company.com/SD]
```

Receiving incoming faxes via email

The Connector for Microsoft Exchange lets RightFax users receive faxes as email message attachments instead of (or in addition to) receiving them in their FaxUtil mailboxes.

To configure a user to receive faxes in email

1. In Enterprise Fax Manager, double-click the user to open the **User Edit** dialog box, and click the **Inbound Routing** tab.

The screenshot shows the 'User Edit' dialog box with the 'Inbound Routing' tab selected. The fields are as follows:

- Routing Code (DID/DNIS number):** 5555
- Routing Type:** Microsoft Exchange
- File Format:** TIFF (G3-1D)
- Routing Info:** JANE DOE
- Received Fax Routing Form:** Advanced Outlook Form
- Delete after routing?

2. In the **Routing Type** box, select Microsoft Exchange.
3. In the **File Format** list, select the document format delivered to the user's email.
 - TIFF or TIFF (Enhanced): When TIFF (Enhanced) is selected, only the enhanced copy of the TIFF is delivered by email.
 - GIF: Graphics Interchange Format.
 - PDF or PDF(Searchable): Searchable PDF requires the optional Searchable PDF module. If this module

is activated, searchable PDF files are sent regardless of which PDF option is selected.

4. For more information about inbound routing file formats, see the *RightFax Administrator's Guide*.
5. In the **Routing Info** box, enter the Outlook user's Display Name, Alias, Distinguished Name, or SMTP address.

To prevent possible duplication, the Distinguished Name is recommended.

Tip When synchronizing users from Active Directory, the routing info field is automatically populated with the SMTP address.

6. If you have installed Outlook forms (see [Installing the RightFax Form for Outlook](#) on page 25), select the form you want to route incoming faxes to in the **Received Fax Routing Form** box. Click **Default** to use the form set in the email gateway configuration in Enterprise Fax Manager (see [Adding and configuring the RightFax Microsoft Exchange Gateway Service](#) on page 6).
7. Select the **Delete After Routing** check box only if you want to delete the fax from the user's RightFax mailbox after it is routed to Exchange.

If RightFax cannot route a fax to the destination email mailbox, it leaves the fax in the user's RightFax mailbox regardless of how this option is set.

Breaking up large faxes

Some Exchange servers define a maximum file size for inbound messages.

By default, if a fax image attached to an inbound mail message exceeds this maximum file size, an error is logged and the message is not sent.

To bypass this limit, RightFax can be configured to automatically break fax images into multiple files and send them as separate mail messages.

To configure RightFax to break faxes into multiple files

1. Add a new DWORD Windows registry entry "MaxMessageSize" under HKEY_LOCAL_MACHINE\Software\RightFax\Gateway\Gateway# (64-bit: HKEY_LOCAL_MACHINE\Software\Wow6432Node\RightFax\Gateway).
2. Set the value of this key to the maximum file size in Kb.

Any faxes that exceed this size are automatically divided into multiple faxes and multiple mail messages.

Decreasing document load time

If opening faxes or other RightFax documents takes longer than expected, you can enable an option that prevents Outlook clients from contacting the RightFax server when opening a new fax.

To decrease document load time

1. Log on to the Outlook client workstation using an account that is a member of the local administrators group.
2. Open the Windows registry and create the following subkey:

HKEY_CURRENT_USER\software\rightfax client\OutlookExtension\

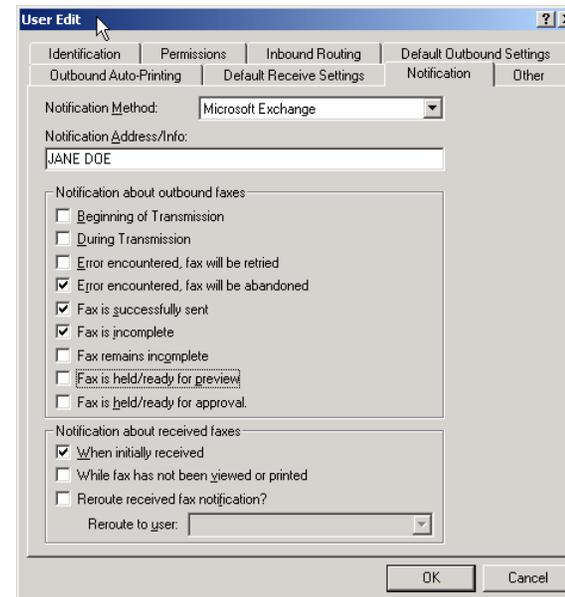
3. Create a new DWORD value called **ContactFaxServer** and set the value to 0.
4. Close the Windows registry.

Email notification of received faxes

The Connector for Microsoft Exchange can be used for notification of received faxes regardless of whether the gateway is configured to send and receive faxes.

To configure a user to receive fax notification in email

1. In Enterprise Fax Manager, double-click the user to open the **User Edit** dialog box, and click the **Notification** tab.



2. In the **Notification Method** list, click **Microsoft Exchange**.
3. In the **Notification Address/Info** box, enter the Outlook user's Display Name or Alias.
4. Click **OK** to save the new notification settings.

Group notification

The notification method can be configured for an entire RightFax group by editing the group ID properties in Enterprise Fax Manager and setting the group **Notification Type** to Microsoft Exchange.

Customizing the subject lines of Exchange user notifications

The subject line of each user notification message in Exchange can be customized by adding a Windows registry setting to the RightFax server.

For each message to customize, add a new string registry entry under HKEY_LOCAL_MACHINE\Software\RightFax\Gateway\Gateway# (64-bit: HKEY_LOCAL_MACHINE\Software\Wow6432Node\RightFax\Gateway).

The following table lists each registry entry, the type of notification the message applies to, and its default text value.

Some values let you include variables as part of the string. In each case the variable and its definition is listed.

Custom Exchange Subject Line Registry Settings

| Registry key | Defines the subject line of | Default value |
|----------------|-----------------------------|--|
| ExchangeMsgs_0 | Received Outlook | A new fax has arrived from ~1 (Part ~2 of ~3). |

| Registry key | Defines the subject line of | Default value |
|----------------|---|--|
| | messages that contain newly received faxes | ~1 = CSID of originating fax machine ~2 = Part of the fax (if fax is broken into multiple parts) ~3 = Total fax parts (if fax is broken into multiple parts) ~4 = The number of the fax channel that received the fax ~5 = The unique ID of the fax, assigned by the RightFax server ~6 = ANI information |
| ExchangeMsgs_1 | Notification that a sent fax had an incorrect fax address | Your fax has not been sent because the addressing information was incorrect. |
| ExchangeMsgs_2 | Notification that a sent fax had an invalid fax address | Valid fax destination information is not found in your mail message. The message is discarded. |
| ExchangeMsgs_3 | Notification that a sent fax had an invalid email address | The gateway was unable to validate the email address of the message sender. The message is discarded. |
| ExchangeMsgs_4 | Notification that a sent fax was not sent due to an error during processing | An error occurred processing your message. Please try again or contact your system administrator. The message is discarded. |
| ExchangeMsgs_5 | Notification that a sent fax was not sent due to | An error occurred sending your message. Please try again or contact your system |

| Registry key | Defines the subject line of | Default value |
|----------------|--|--|
| | an error during transmission | administrator. The message is discarded. |
| ExchangeMsgs_6 | Notification that a sent fax marked for preview is ready to view | Your fax to ~1 is ready for previewing. ~1 = Recipient's name |
| ExchangeMsgs_7 | Notification that a sent fax has not been sent | Your fax has not been sent. |
| ExchangeMsgs_8 | Notification that a sent fax had no body content | There is no message body. |

Including the Fax ID in the email notification

The email notification of a received fax in Microsoft Outlook can include the unique ID of the fax in the subject line of the email if you modify the notification messages on the RightFax server.

To change the format of the unique ID, see the section on routing inbound faxes in the *RightFax Administrator's Guide*.

To configure email notification messages to include the fax ID

1. In Enterprise Fax Manager, select the name of the RightFax server you want to modify.
2. Under **Service Name**, double-click **RightFax Server Module**. The **Server Configuration** dialog box opens.

3. On the **Custom Messages** tab, modify the **New Fax** message. Type a message that includes the ~5 variable, which is the unique ID of the fax. The maximum length of a notification message is 200 characters.

For example, enter the message **A new fax has arrived. Fax ID ~5**.

Chapter 5: File Formats that Convert to Fax Format

Before conversion, RightFax checks the whitelist.txt file (in the RIGHTFAX/bin directory) to determine whether attachments are converted to fax format. By default, this file contains all supported file types. To prevent a file type from converting, you can either delete the file type from whitelist.txt, or turn it into a comment by preceding the file type with a comma in the whitelist.txt file. Conversions handled through PCL are always processed, regardless of the white list contents.

The following table lists the supported software applications and document file formats that can be converted to faxes by the built-in conversion engine on the RightFax server. These file types can be converted from their native format by sending as file attachments to a fax message or by using the Send To function in Windows

Important Conversion of PDF attachments and Postscript requires the RightFax PDF Module.

| Application or file format | Supported versions | Common Extension |
|----------------------------|--------------------|------------------|
| Ami Pro | All versions | .SAM |
| ANSI text (7 & 8 bit) | All versions | .TXT |
| ASCII text (7 & 8 bit) | All versions | .TXT |

| Application or file format | Supported versions | Common Extension |
|----------------------------|----------------------------|------------------------|
| Bitmap | Windows versions | .BMP |
| Multi-page PCX | Microsoft Fax | .DCX |
| EPS | If TIFF image is embedded | .EPS |
| G3 | All versions | .G3 .BG3 |
| GIF | All versions | .GIF |
| HTML | Versions through 4.0 | .HTM .HTML |
| JPEG | All versions | .JPG .JPEG .EXIF |
| Lotus 1-2-3 | All versions | .123 |
| Lotus Wordpro | All versions | .LWP |
| Microsoft Excel | Versions 2000 through 2010 | .XLS .XLSX |
| Microsoft PowerPoint | Versions 2000 through 2010 | .PPT .PPTX |

| Application or file format | Supported versions | Common Extension |
|--|----------------------|----------------------|
| Microsoft Rich Text Format | All versions | .RTF |
| Microsoft Visio | 2000 through 2010 | .VSD |
| Microsoft Word (see note below) | 2000 through 2010 | .DOC .DOCX |
| Microsoft WordPad | All versions | .TXT .WPC |
| Microsoft Works | Versions through 8.0 | .WPS |
| Microsoft XML Paper specification | All versions | .XPS |
| MIME | All versions | .MHTML |
| PCX bitmap | All versions | .PCX |
| Portable Document Format (see note below) | All versions | .PDF |
| Portable Network Graphic | All versions | .PNG |
| Post Script | All versions | .PS .EPS |
| Text-based configuration files | Varies by product | .FTP .FRM .WPC |
| TIFF CCITT Group 3 & 4 | All versions | .TIFF |
| Unicode Text | UNI, UTF-8, UTF-8E | .TXT |
| UUencode | No specific version | .TXT |
| vCard | All versions | .VCF |
| Visio | All versions | .VSD |
| XML | All versions | .XML |

Chapter 6: E-mail Compatible Embedded Codes

Embedded codes are special faxing instructions that you insert into fax-bound e-mail messages. You can use embedded codes to include fax cover sheet information, attach library documents, specify a time to send the fax, and more.

To add an embedded code to an e-mail message, type the code you want, along with any required parameters, between angle brackets. For example, an embedded code that tells RightFax to include the library document "Priceguide" along with the text of the e-mail is written as:

```
<LIBDOC2:PRICEGUIDE>
```

RightFax removes all embedded codes from the e-mail message when it converts it to fax form, so they don't appear in your final fax. If you type an embedded code incorrectly, it is ignored by RightFax and is included in your fax. Write embedded codes in upper or lower case. Embedded codes work consistently regardless of the e-mail applications used to create documents.

Although you can use any fonts you want in the text of your e-mail messages, embedded codes **must always** use a native printer font. This is because when the file is converted to PCL5 format, all other font types are encoded as graphic images. Only native printer fonts are stored in the PCL file in their original text format. It is this text in the PCL file that is replaced. If you do not use native printer fonts for your

embedded codes, the codes themselves appears in the instead of being replaced by the information or instruction they represent. All embedded codes are surrounded by angle brackets (< >) in the same native printer font.

Note For best results, consider using only the "Courier" native printer font for embedded codes.

Embedded codes can be placed anywhere in the e-mail message that you are faxing. They cannot line wrap and any embedded code statement that is so long that it wraps to a second line is ignored.

This section lists only embedded codes that are recognized by the e-mail gateways. RightFax supports several additional embedded codes when faxes are generated from native applications. For a complete list of embedded codes supported by RightFax, refer to the *RightFax Administrator's Guide*.

ATDATE

Format <ATDATE:date>

Schedules the fax to send on a specific date. Dates can be expressed as relative or absolute. Relative dates give the number of days from today's date. For example, "+7" represents one week from today. Absolute dates specify the exact date to send the fax. Absolute dates must be written in

one of these formats: MM/DD/YY, MM-DD-YY, or MM-DD-YYYY.

If no send time is specified with the <ATTIME> code ([ATTIME +](#) on [page 42](#)), the send time defaults to "now" (the current time of processing). For example, if a fax is sent to the queue at 3:30 p.m. and it contains only an <ATDATE:+1> code, it is scheduled to send at 3:30 p.m. tomorrow.

Maximum field length: 10 characters

Example <ATDATE:9-15-99>

Example <ATDATE:+2>

ATTIME

Format <ATTIME:*time*>

Schedules the fax to send at a specific time. The time can be relative or absolute.

Relative time is the number of hours or minutes from the current time. For example, "+2" is two hours from now. You can enter fractions of an hour in six-minute increments. Valid fractions of an hour are 0.1 through 0.9. You must enter at least one digit before and after the decimal point. For example, 1.5 and 0.3 are valid, and 1.50 and .3 are not valid.

Absolute time can be entered in 12-hour or 24-hour format. A colon separating hours and minutes is optional, and an "a" or "p" can be used to indicate A.M. or P.M. The fax server does not send the fax at exactly the minute specified. Rather, the fax becomes eligible for scheduling within 15 minutes of the specified time.

Specifying a time between the current time and midnight schedules the fax to send today. Specifying a time earlier than the current time schedules the fax tomorrow.

Maximum field length: 9 characters

Example <ATTIME:10:00p>

Example <ATTIME:+2>

BILLINFO1 (BI1)

Format <BILLINFO1:*code*>

Assigns a billing code to the fax. The billing code is sent but it is not validated by RightFax.

Maximum field length: 15 characters

Example <BILLINFO1:4444>

BILLINFO2 (BI2)

Format <BILLINFO2:*code*>

Assigns a second billing code to the fax. The billing code is sent but it is not validated by RightFax.

Maximum field length: 15 characters

Example

<BILLINFO2:5555>

CHANNEL

Format <CHANNEL:*channel#*>

Sends the fax only on the specified channel of the fax board. This code is useful if your organization uses one channel for priority faxing, and you want the fax to go out right away. You can also use this code to limit fax broadcasts to one channel only, leaving the other channels free for priority faxing.

Although your server's first fax channel is listed as number 0 (zero) in the RightFax DocTransport module, a value of 0 in this embedded code indicates that the server uses any available channel. For this reason, any channel you specify in

this embedded code must be numbered one higher than the channel as it is listed in the DocTransport (i.e., specify <CHANNEL:5> to use channel 4 as shown in the RightFax DocTransport. The DocTransport's channel 4 is actually the fifth channel because channels begin numbering at zero.)

Maximum field length: N/A

Example <CHANNEL:3>

COVER

Format <COVER>

Generates a RightFax cover sheet for the fax containing the code. If the user sending the fax containing this code is configured to automatically generate a cover sheet, only one cover sheet is generated.

Unless a cover sheet file name is specified using the <FCSFILE> embedded code ([FCSFILE](#) + on [page 43](#)), this code uses the default cover sheet file.

Maximum field length: N/A

DELETE

Format <DELETE>

Deletes the fax from the user's FaxUtil mailbox after it is successfully sent. This code overrides the default RightFax auto-delete setting.

Maximum field length: N/A

DELETEALL

Format <DELETEALL>

Deletes the fax from the user's FaxUtil mailbox after it is sent or attempted. This code overrides the default RightFax auto-delete setting.

Maximum field length: N/A

FCSFILE

Format <FCSFILE:*filename*>

Uses the specified file as the RightFax-generated cover sheet. The cover sheet file must exist in the RightFax\FCS folder on the RightFax server and must end with the extension .pcl. Do not specify a directory path.

Maximum field length: 12 characters

Example <FCSFILE:MYCOVER1.PCL>

FINE

Format <FINE>

Converts the body of the fax using "fine" resolution (200 × 200 DPI). This is recommended only for faxes with detailed graphics or faxes to be OCR'd. This code overrides the default fax resolution set in the user's FaxUtil mailbox.

Maximum field length: N/A

FROMFAXNUM

Format <FROMFAXNUM:*faxnumber*>

Specifies the sender's fax number on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code is ignored.

Maximum field length: 31 characters

Example <FROMFAXNUM:(520)555-1234>

FROMGENFAXNUM

Format <FROMGENFAXNUM:*faxnumber*>

Specifies the company's general fax number to be placed on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code is ignored.

Note The PCL Cover sheet code for this embedded code is <GENERALFAXNUM>.

Maximum field length: 31 characters

Example <FROMGENFAXNUM:(520)555-2345>

FROMGENPHONE

Format <FROMGENPHONE:*phonenumber*>

Specifies the company's general phone number to be placed on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code is ignored.

Note The PCL Cover sheet code for this embedded code is <OPERATORNUM>.

Maximum field length: 31 characters

Example <FROMGENPHONE:(520)555-3456>

FROMPHONE

Format <FROMPHONE:*phonenumber*>

Specifies the sender's phone number to be placed on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code is ignored.

Maximum field length: 31 characters

Example <FROMPHONE:(520)555-4567>

IGNORE

Format <IGNORE>

Causes all subsequent embedded codes to be ignored.

Maximum field length: N/A

LIBDOC

Format <LIBDOC:*documentID*>

Sends the specified RightFax library document instead of sending the document containing the code. Multiple library documents can be specified, each as a separate LIBDOC code.

Important When used with email gateways, this embedded code functions exactly the same as LIBDOC2.

Maximum field length: 21 characters

Example <LIBDOC:INFOPACK1>

LIBDOC2

Format <LIBDOC2:*documentID*>

Sends the specified RightFax library document in addition to sending the document containing the code. Multiple library documents can be specified, each as a separate LIBDOC2 code.

Maximum field length: 21 characters

Example <LIBDOC2:INFOPACK1>

NOCOVER

Format <NOCOVER>

Turns off automatic RightFax cover sheet generation for the document containing this code.

Maximum field length: N/A

NORMAL

Format <NORMAL>

Converts the body of the fax using “normal” resolution (200×100 DPI). Normal resolution faxes can be transmitted much faster than fine resolution faxes, saving time and phone charges. This code overrides the default fax resolution set in the user’s FaxUtil mailbox.

Maximum field length: N/A

PREVIEW

Format <PREVIEW>

Holds the fax for preview in your FaxUtil mailbox. You must view the fax in FaxUtil and select **Release** from the **File** menu before it sends.

Maximum field length: N/A

PRIORITY

Format <PRIORITY:priority>

Sets the priority of the outgoing fax. Allowed settings are: Low (L), Normal (N), and High (H). If a user specifies high priority and does not have the “Can use high priority” permission, the fax is sent with “normal” priority.

Maximum field length: N/A

Example

<PRIORITY:HIGH><PRIORITY:N><PRIORITY:LOW>

RETRYCOUNT

Format <RETRYCOUNT:#>

Specifies the number of times the fax is retried after encountering transmission errors (such as a busy signal or human answered line). A value of 0 (zero) tells the fax server to use the system defaults.

Maximum field length: 2 numeric digits

Example <RETRYCOUNT:3>

RETRYINTERVAL

Format <RETRYINTERVAL:#>

Specifies the length of time in minutes between retry attempts when transmission errors (such as a busy signal or human answered line) are encountered.

Maximum field length: 2 numeric digits

Example <RETRYINTERVAL:2>

SAVE

Format <SAVE>

Instructs RightFax to not delete the fax image from the user’s FaxUtil mailbox after being sent. This overrides any default auto-delete setting.

Maximum field length: N/A

SMARTRESUME

Format <SMARTRESUME>

Enables the Smart-resume feature.

Maximum field length: N/A