



## Business insights, monitoring, and alerting for RightFax



**FaxPulse Business Intelligence** provides organizations with a detailed macro and micro view of the fax metadata for their RightFax system(s). Data is aggregated for quick consumption into intuitive dashboards along 3 different dimensions: Volume, Health, and Usage. The individual data points are also made available for in-depth analysis, and the analytics portion of FaxPulse extracts metadata from the RightFax database and stores it in a data warehouse for reporting. For security and compliance reasons, fax images are not stored.



**FaxPulse Monitoring and Alerting** provides real-time monitoring of over 100 RightFax metrics and generates administrative email alerts should a metric fall outside of the customizable thresholds. Fax volume can be tracked by many different attributes including user, group, result, error code, and timeframe. Errors can be tracked through all the different stages of the fax lifecycle, with alert emails sent should the error rate exceed expectations.



**FaxPulse Automated Inbound** provides organizations with 24/7 inbound availability monitoring to ensure RightFax systems are always available to external partners and vendors. Pulses are sent through the RightFax server on a configurable schedule, and FaxPulse alerts administrators if any transmission errors occur.

## FaxPulse 2023



FaxPulse does monitoring, error detection, and business intelligence for you, making it easy to monitor and manage your RightFax system with less workload and resources. Speak with a representative to learn more of how FaxPulse helps organizations reduce cost of ownership and improve system performance for any sized system.



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# User Guide

## FaxPulse BI Overview

FaxPulse Business Intelligence consists of a series of dashboard and insights screens that allow users to perform routine and exploratory analysis on their RightFax system(s).

Routine analysis typically involves reviewing key metrics (KPI) and might include:

- Daily check on fax volume compared to specific dates and points in time
- Weekly failure rate and error code review
- Channel utilization tracking to ensure appropriate system sizing

Exploratory analysis typically requires filtering and exploring of data and might include:

- Root cause analysis on a system outage
- Discovery of usage by users for DID reclamation
- Phonebook review to find numbers that need to be updated

### Application Architecture

FaxPulse BI is designed to run on a separate server from RightFax. The Dashboards and Pages are accessible by web browser. The pages are secured, and users must log in using their Active Directory credentials to access the system. Configuration is also web based.

### Data Loading and Storage

Data is extracted from the RightFax database on a configurable schedule and supplements the data stored locally on the FaxPulse Server. This means that even if extracted data is purged from the RightFax database, it is available for analysis in FaxPulse. Data refresh is configurable according to system needs.

The **Tactical Dashboard** holds 90 days of data by default (**the Tactical Time Period**) in its repository compared to unlimited data storage and loading available in the **Annual Dashboard** for long-term insights.

## Tactical Dashboard

The Tactical Dashboard provides a bird's eye view of current critical metrics throughout your system, including: windows for system volume, health, usage, and insights. Depending on overall volume and maintenance needs, you can set custom refresh rates for your data.



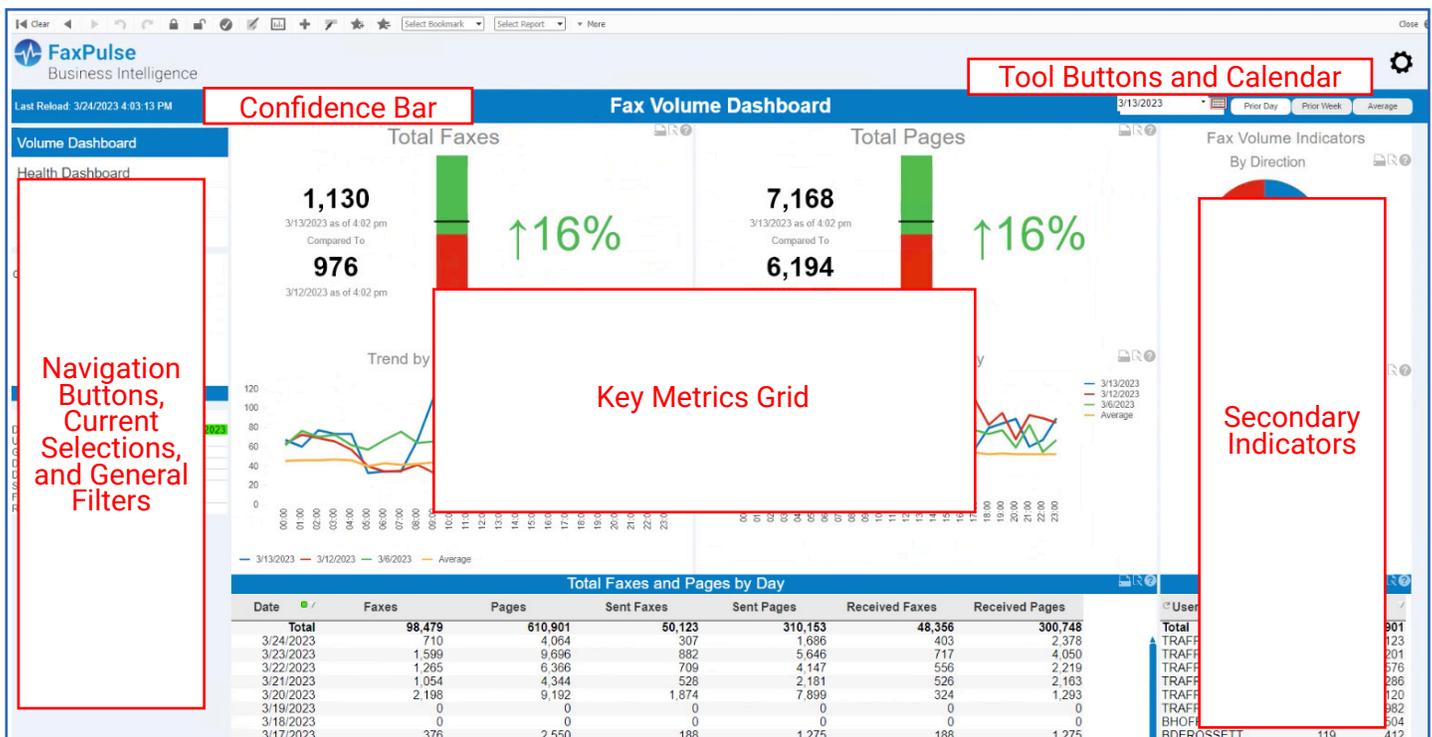
The Tactical Dashboard serves as a day-to-day metrics grid for in-depth insights into daily usage when compared to other points in time, whether it be the previous day or week.

## Page Layout

The pages in the FaxPulse Tactical Dashboard have a consistent design. The top left corner of each page has navigation buttons, allowing the user to move from page to page. Above that menu, there is a confidence bar that shows when the data was last loaded into the system. Tools and settings are located at the very top right of the page with the Calendar and date selection just below. Down the left-hand side is the Current Selections box, and General Filters. The content on the rest of the page depends on whether it is a FaxPulse Dashboard or an Insights page.

## Dashboards

The FaxPulse Tactical dashboard(s) can be broken down into three principal areas: the Key Metrics Grid (top center), Secondary Indicators (right column), and the Total Faxes Chart (bottom center). The data on the Dashboard pages has been aggregated over different dimensions, such as time, users, and systems.



The Key Metrics Grid presents the top KPIs for the selected dashboard, for example: Total Faxes and Total Pages on the Volume Dashboard. The Key Metrics Grid presents the data for the current date or the date selected. This data is compared to the same point in time the previous day or a selected date.

Secondary Indicators provide additional information that might be useful when understanding the Key Metrics. For example, when reviewing the total faxes for a day, it might help to understand which users are using the system the most – so FaxPulse provides a view of users by volume.



## Insights

The body of the Insights pages are different from the Dashboard pages in that they present the underlying data in an unaggregated format. Down the left-hand side of the Insights panel is the Current Selections section, allowing the user to select which report to view, and in the center of the page is the Data Grid, showing the actual data.

Group ID	User ID	User Name	Route Code	Total Faxes	Faxes Received	Received Sent	Total Pages	Earliest Fax	Most Recent Fax	Route
I_NEW_USER_NEED_GRO...	ROI			6789	1	1	4	2/10/2023 3:43:15 PM	2/10/2023 3:43:15 PM	Route to RightFa
DEMO_TESTING	BDEROSSETT	Ben Squared		100	258	258	858	1/6/2023 4:39:23 PM	4/5/2023 4:46:49 PM	Route to Exchan
DEMO_TESTING	BDEROSSETT@...	Ben Derossett		100	30	30	91	2/2/2023 5:07:13 PM	4/5/2023 4:43:57 PM	Route to Exchan
DOUG_DEMO	DOUG	Doug Byrne	5001	28	28	28	77	1/31/2023 12:48:18 PM	3/2/2023 10:36:55 AM	Route to Exchan
DOUG_DEMO	DOUG_H							1/31/2023 12:51:09 PM	3/2/2023 9:45:55 AM	Route to SMTP
DOUG_DEMO	DOUG_N							1/31/2023 12:50:34 PM	3/2/2023 10:36:55 AM	Route to file
DOUG_DEMO1	DOUG_D							1/31/2023 12:52:19 PM	3/2/2023 10:39:44 AM	Route to SMTP
EVERYONE	ADMINIS							1/6/2023 5:10:44 PM	3/9/2023 12:47:45 PM	Route to RightFa
EVERYONE	AHPROD							2/10/2023 3:41:03 PM	2/10/2023 3:41:03 PM	Route to RightFa
EVERYONE	BHOFFM							1/6/2023 4:39:23 PM	4/5/2023 4:46:49 PM	Route to Exchan
EVERYONE	EPHESQ							1/9/2023 2:32:24 PM	3/31/2023 12:18:51 PM	Route to file
EVERYONE	JANDRE							1/20/2023 2:31:32 PM	3/31/2023 12:18:14 PM	Route to Exchan
EVERYONE	JTA							2/14/2023 5:05:44 PM	2/14/2023 5:05:44 PM	Route to Exchan
EVERYONE	NETDIR							1/9/2023 2:32:24 PM	3/31/2023 12:18:51 PM	Route to file
EVERYONE	TRAININ							1/6/2023 5:10:20 PM	1/6/2023 5:14:18 PM	Route to RightFa
EVERYONE	WALKUP							3/30/2023 5:02:24 PM	3/30/2023 5:02:24 PM	Route to RightFa
INTAKE_GRP	INTAKE							3/9/2023 12:47:30 PM	3/9/2023 12:47:30 PM	Route to RightFa
JBB	JEFF							1/9/2023 2:30:47 PM	3/31/2023 12:18:51 PM	Route to SMTP
MEMORIAL_HOSPITAL	MM_FQ							2/16/2023 1:58:04 PM	2/16/2023 1:58:04 PM	Route to file
PCI_DSS_TEST	SAM							1/6/2023 4:38:40 PM	3/30/2023 11:36:11 AM	Route to Exchan
TRAFFICUSER	TRAFFICUSER0	Jack Bauer	3000	19616	19616	19616	120078	1/24/2023 6:28:50 PM	4/6/2023 9:39:05 AM	Route to RightFa
TRAFFICUSER	TRAFFICUSER1	Walter White	3001	19698	19698	19698	121656	1/24/2023 6:35:43 PM	4/6/2023 9:19:02 AM	Route to RightFa
TRAFFICUSER	TRAFFICUSER2	Dr. Gregory Ho...	3002	19413	19413	19413	119514	1/24/2023 6:26:30 PM	4/6/2023 9:39:38 AM	Route to RightFa
TRAFFICUSER	TRAFFICUSER3	Ron Swanson	3003	19811	19811	19811	123184	1/24/2023 6:26:29 PM	4/6/2023 9:47:35 AM	Route to RightFa
TRAFFICUSER	TRAFFICUSER4	Olivia Benson	3004	19589	19589	19589	119819	1/24/2023 6:27:29 PM	4/6/2023 9:52:37 AM	Route to RightFa
TRAFFICUSER	TRAFFICUSER5	Randy Marsh	3005	19532	19532	19532	120677	1/24/2023 6:26:30 PM	4/6/2023 9:47:16 AM	Route to RightFa
				6296	6296	6296	0			

The headers in the Data Grid allow for sorting, searching, and selecting data in the grid. Any cell can be selected to filter the data as well. This is extremely helpful when performing exploratory analysis to discover important insights. Filtered data in the Data Grid can be exported to Excel.

## Annual Dashboard

The Annual Dashboard provides users with long-term analytics and planning capabilities through a robust analytics and platform built on system data over the lifespan of your RightFax system. Additionally, it provides administrators with extensive reporting and data export capabilities. Data is refreshed on a configurable schedule.

## Page Layout

The pages in the FaxPulse Annual Dashboard have a consistent design. The top left corner of each page has navigation buttons, allowing the user to move from page to page. Above that menu, there is a confidence bar that shows when the data was last loaded into the system. Tools and settings are located at the very top right of the page with the Calendar and date selection just below. Down the left-hand side is the Current Selections box, and General Filters. The content on the rest of the page depends on whether it is a FaxPulse Dashboard or an Insights page.



## Dashboards

The FaxPulse Annual dashboard can be broken down into three principal areas: the Key Metrics Grid (top center), Secondary Indicators (right column), and the Trend Chart (bottom center). The data on the Dashboard pages has been aggregated over different dimensions, such as time, users, and systems.

The screenshot shows the FaxPulse Business Intelligence dashboard. At the top, there are navigation buttons for 'Volume Dashboard', 'Health Dashboard', 'Usage Dashboard', 'Fax Insight', 'Delegate Roles', and 'Custom Reports'. A 'Confidence Bar / Tool Buttons' area shows 'Last Reload: 3/24/2023 4:07:36 PM' and 'License: OK - License Verified'. The main content area is divided into several sections:

- Current Selections, General Filters, and Calendar:** A vertical sidebar on the left containing filters and a calendar.
- Key Metrics Grid:** A central table with columns for 'Day View', 'Week View', 'Month View', and 'Year View'. It displays metrics like 'Total Faxes' and 'Total Document Pages'.
- Trend Chart:** A line chart below the Key Metrics Grid showing 'Fax Pages vs. Avg Seconds / Page vs. Avg. Pages / Fax' over time.
- Secondary Indicators:** A table on the right titled 'Top 10 List - Faxes / Pages' showing user IDs, total faxes, and total pages.

The Key Metrics Grid presents the top KPIs for the selected dashboard, for example: Total Faxes and Total Document Pages on the Volume Dashboard. The Key Metrics Grid presents the data by Day, Week, Month and Year. When one of the columns is highlighted (by clicking on the header), the Secondary Indicators and Trend Chart show only the data for that column. For example, if the Day View column is selected, the Secondary Indicators and the Trend Chart will show data for that day.

Secondary Indicators provide additional information that might be useful when understanding the Key Metrics. For example, when reviewing the total faxes for a day, it might help to understand which users are using the system the most – so FaxPulse provides a view of the top 10 users by volume.

The Trend Chart shows the data over time, breaking it down by the next smallest interval. For example, if the Year View is selected in the Key Metrics Grid, the trend chart will show the data by Month. This allows the user to understand how the data is changing over time.





# Using FaxPulse BI

## Discovering and Analyzing Data

### Selections and Filters

Making selections is the main interaction method in FaxPulse. Selections filter out a subset of the data that has been loaded into FaxPulse. You use selections to investigate something you want to know more about, and FaxPulse responds by color-coding the possible and excluded values associated with your selections.

### Making Selections

To select a value from a field, simply click the value. Once selected, the cell turns green to indicate its new state, selected. The selection may affect the states of many values in the other sheet objects, on the current sheet and on other sheets. White cells represent optional field values, and gray cells represent field values excluded by selections. When a selection is made, natural joins are dynamically evaluated between all the associated tables. Selections can be made in most kinds of sheet objects.

To deselect a previously made selection, click it again. Alternatively, choose Clear from the Object menu, or choose one of the Clear commands in the Selections menu. When an excluded value is clicked, selections in conflict with this value are canceled, and the value clicked becomes selected. Selections can also be made by searching for the wanted values.

### Multiple Selections Within a Field

Multiple selections within a field, i.e., allowing several values from a field, can be made in several ways:

- Position the cursor in the list box and drag it over several field values while pressing the mouse button.
- Click the first field value to be selected, then Ctrl-click each additional selection.
- Click the top item to be selected, then Shift-click the bottom item to be selected. This way all the items in between will be selected. However, if the sorting mechanism is on, the first selection may cause the order to change, which makes it difficult to make a correct second selection.
- Confirm a text search and then press Enter. This will result in all matching field values being selected. By keeping the Ctrl key depressed while pressing Enter, the selections from the text search will be added to previous selections.

To deselect a previously made additional selection, Ctrl-click it.

If you have made multiple selections in one list box and make a new selection from the available optional values in another list box, some of the selected values in the first list box may get excluded. However, when the selection in the second list box is canceled, the previous selections will, by default, be recovered. Multiple selections are normally interpreted as a logical OR, which means that FaxPulse will find a solution that is associated to either one



normally interpreted as a logical OR, which means that FaxPulse will find a solution that is associated to either one of the selected field values.

## Searching for a Selection

You can search data and make selections in table boxes by using the Drop-down Select, an arrow that is displayed in the column heading. Clicking on the arrow displays a list of the values that belong to this field. You can make selections and searches in this list just as in a list box.

To search for a specific value, click on the arrow and start typing. A search box will be displayed and the values in the list will be filtered based on the text that is entered. Matches will be highlighted in yellow.

Wildcard characters can be used when searching for values:

- \* - Matches 0 or more characters
- ? - Matches exactly 1 character

This can be helpful when fax numbers have parenthesis or dashes in the data. For example, to find the number (212) 555-1234 and 2125551234, search for \*212\*555\*1234. normally interpreted as a logical OR, which means that FaxPulse will find a solution that is associated to either one of the selected field values.

## Locking Selected Field Values

When selecting an excluded field value, previous selections in conflict with the new choice are canceled. To prevent a previous selection from getting canceled this way, it is possible to lock a selection by right clicking on the selection and choosing the Lock command.

To unlock a previously set lock, right-click on a locked selection and select Unlock. General locks and unlocks of all the selections can be made from the Selections menu. When trying to select a value which is incompatible with a locked selection in another field, the selection will fail.

By means of the Override Locked Field setting for list boxes, multi boxes and slider objects it is possible to override a locked selection in a field from a specific sheet object. The field will still be locked for logical changes stemming from selections in other fields. This option is on by default for slider objects.

## Locking Selected Field Values

Indicators (or beacons) are colored dots that sometimes appear in tables. Indicators are there simply to remind you of selections that have been made in fields that are not available on the sheet that you are currently viewing. Since all sheets of a FaxPulse document are fully interconnected, such selections will affect what is displayed on the active sheet - even when not immediately apparent.

This is the main reason for having indicators. Selection indicators may also appear in the upper right-hand corner of the data fields in the FaxPulse tables. Selection indicators will appear in the current selections box window to distinguish between selected and locked values.



## Color Scheme

The state of a field value is shown by the color of its cell. The following color scheme is used by default:

- Green – Selected
- White – Optional
- Gray – Excluded

There are also other color codes that can be used under special circumstances:

- White / Yellow – Alternative
- Blue – Locked
- Red – Result of forced exclusion

## Current Selections Window

In the **Current Selections** window, selections are listed by field name and field value. This window remains in the top left of every sheet and helps keep track of the selection status in the document. In the Status column, indicators are used for distinguishing between selected and locked values. It is opened from the View menu or the Current Selections button in the toolbar. When you right-click in the Current Selections window without having highlighted a field, the float menu that contains the following commands is displayed:

- **Clear All Selections:** Deselects all the selected values of the document.
- **Lock All Selections:** Locks all the selected values of the document.
- **Unlock All Selections:** Unlocks all the locked values of the document.

The Current Selections window is dynamically updated as soon as new selections are made, which gives you an overview of the current selections at any time. The maximum number of distinct selected values to be shown in the Current Selections windows is specified in the User Preferences dialog.

When more values are selected, they will only be displayed as '**x values of y**' for the respective field. Selections made in AND-boxes are preceded by **&** or **!**, depending on whether it is a selection or an exclusion.

## Bookmarking Selections

The current state of selections can be saved as bookmarks for later use. Bookmarks capture selections in all states defined in a FaxPulse document. When recalling a bookmark, the selections in all states will be applied.

### Adding a Bookmark Dialog

The current state of selections can be saved as a bookmark by choosing the Add Bookmark button from the toolbar. This opens the Add Bookmark dialog box:



★ Add Bookmark

**Bookmark Name:**

Share Bookmark with Other Users  
 Include Selections in Bookmark  
      Make bookmark apply on top of current selection  
 Include Layout State  
 Include Scroll positions  
 Include Input Field Values

**Description:**

Show description as a pop-up message

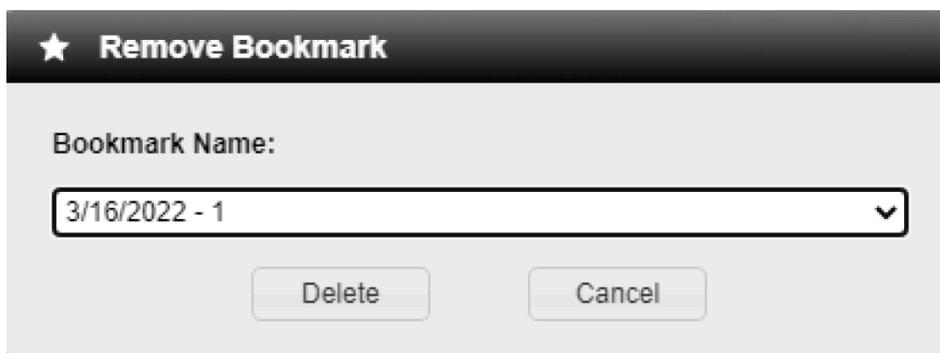
Bookmark Name	The default name for the created bookmark is that of the current date. In addition, the first bookmark created on a specific day gets number 1, the second number 2, etc. However, it is possible to change the default name to a more explanatory text by entering an optional name.
Share Bookmark with Others	Marking this check box will immediately share the bookmark for use by other authenticated users of the same server document. It is possible to revoke the sharing by deselecting the Share check box in the My Server Bookmarks page of the Bookmarks dialog.
Include Selections in Bookmark	By marking the check box, the bookmark will include the selections made in the application.
Make Bookmark Apply on top of Current Selection	By marking the check box, the bookmark will be applied without first clearing existing selections in the document.
Include Layout State	By marking the check box, the bookmark will store the layout state of all sheet objects on the active sheet at the time of the bookmark's creation. This includes, for example, the cycling position of a chart. When recalling a bookmark with layout information, FaxPulse will attempt to activate and restore sheet objects to that state. The layout state in bookmarks includes only show state (minimized/maximized) and expansion state, not the entire property of the object. Layout of all straight tables and pivot tables on the active sheet will be preserved unless they are located inside container objects. However, straight tables and pivot table column positions will not be preserved. There is no reset option for straight tables and pivot table layout. A workaround would be to create a document bookmark in the document clear state with the original layout of the pivot table.
Include Scroll Positions	Marking this check box will include the current vertical scroll position in table objects in the bookmark.



Include Input Field Values	By marking this check box, the values in input fields will be stored in the bookmark.
Description	In the edit box, you can enter a text describing this bookmark or a message to be shown when recalling it.
Popup Message	If the check box is marked, the bookmark info text (if it exists) will be displayed in a popup window each time the bookmark is recalled.

## Removing a Bookmark

Bookmarks can be deleted by choosing the **Delete Bookmark button** from the tool bar. This opens the Remove Bookmark dialog box. To delete the bookmark, select a bookmark from the list and click the Delete button.



## Applying a Bookmark

Saved bookmarks can be chosen from the **Select Bookmark** drop down list in the tool bar:



# Exporting Data

## Dashboard Pages

To export a full dashboard page, simply print the page to a PDF. Typical print settings are:

- Layout: Landscape
- Include background graphics



## Charts

There are two options when exporting data that is presented as a chart in FaxPulse BI.

First, to export the chart as a graphic, right-click on the chart and select **Print**. This will open a new browser tab with just the chart displayed. Also, the page will include the **Selection Status** that shows the current selections in the dashboard.

Alternatively, it might be necessary to export the data that defines the chart. To do this, right-click on the chart and select **Send to Excel**. This will generate an Excel document with all the underlying data for the chart.

## Data Tables

To export the filtered data in any data table, right-click on the table and select **Send to Excel**. This will generate an Excel file with the columns and rows for the current data table.

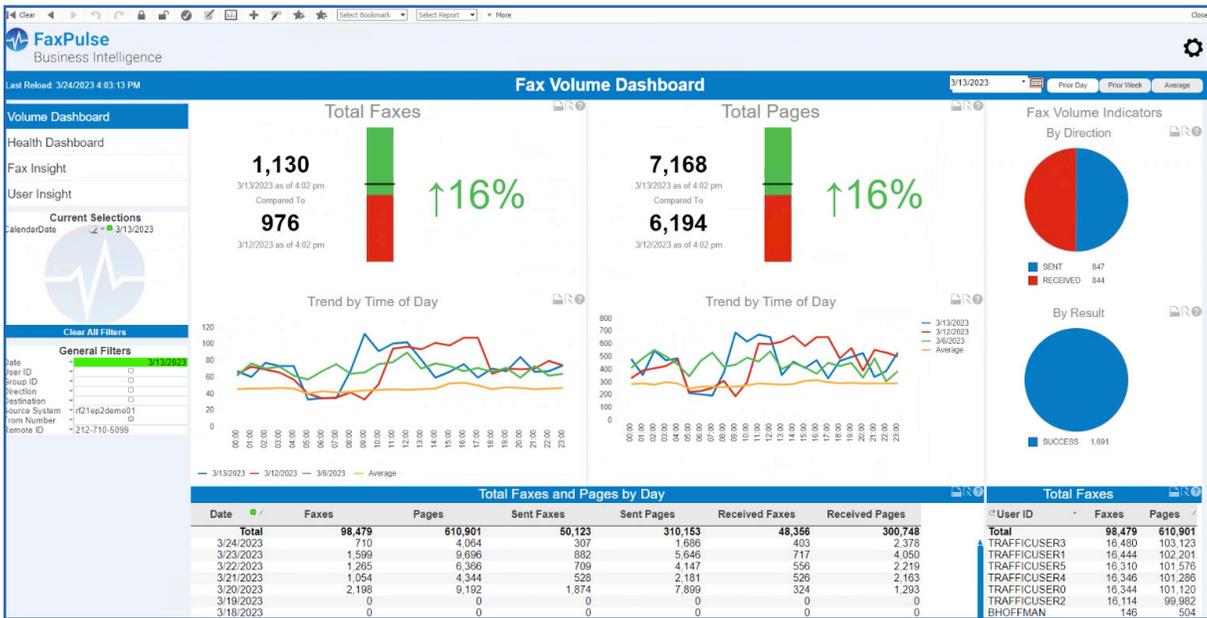


# Page Elements

## FaxPulse Business Intelligence

### Tactical Dashboard

### Volume Dashboard



The Volume Dashboard provides in-depth and near real-time information regarding the number of faxes and fax pages sent and received by a RightFax system (or multiple systems) by Time of Day, presenting percentage and numeric changes in time.

### Key Metrics

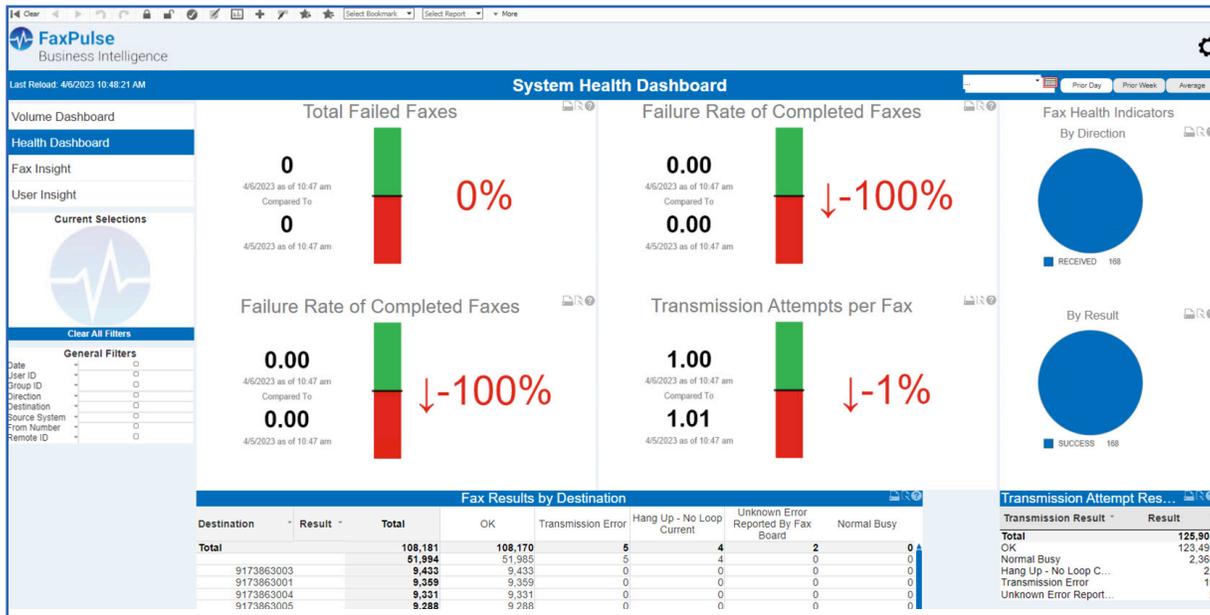
- Total Number of Faxes
- Percent Variation in Faxes

### Key Data Points

- Faxes / Pages by Time of Day
- Faxes / Pages by Day
- Sent / Received Pages by Day
- Total Faxes by User



## Health Dashboard



The Health Dashboard provides in-depth and near real-time information regarding the number of failed faxes, fax failure rates, and fax results by destination.

## Key Performance Indicators

- Successful Faxes (Sent / Received)
- Failed Faxes (Sent / Received)
- Failure Rate (Sent / Received)
- Fax Results by Destination
- Transmission Attempt Results

## Trend Information

- Total Faxes
- Successful Faxes
- Failed Faxes

## Trend Information

- Direction (Sent / Received)
- Result (Success / Failure)
- Failure Reasons



## Fax Insight

D	V	P	Fax Creation Date & Time	Fax Status	Status Details	Destination	Owner	Pages	Unique ID	Fax Handle	To Number	To Name	To Company
4/6/2023	9:52:37 AM	Initial Processing	OK	TRAFFICUSER4	2 pgs	TRA642E9687C...	129125						
4/6/2023	9:47:35 AM	Initial Processing	OK	TRAFFICUSER3	2 pgs	TRA642E9559C...	129117						
4/6/2023	9:46:22 AM	Initial Processing	OK	TRAFFICUSER3	2 pgs	TRA642E9515C...	129113						
4/6/2023	9:46:03 AM	Initial Processing	OK	TRAFFICUSER4	2 pgs	TRA642E94F6C...	129112						
4/6/2023	9:43:43 AM	Initial Processing	OK	TRAFFICUSER5	8 pgs	TRA642E94F6C...	129111						
4/6/2023	9:39:38 AM	Initial Processing	OK	TRAFFICUSER2	2 pgs	TRA642E9367C...	129103						
4/6/2023	9:39:19 AM	Initial Processing	OK	TRAFFICUSER5	2 pgs	TRA642E936EC...	129102						
4/6/2023	9:39:05 AM	Initial Processing	OK	TRAFFICUSER0	8 pgs	TRA642E93C9C...	129104						
4/6/2023	9:39:00 AM	Initial Processing	OK	TRAFFICUSER0	8 pgs	TRA642E9350C...	129101						
4/6/2023	9:36:20 AM	Initial Processing	OK	TRAFFICUSER4	2 pgs	TRA642E9296C...	129098						
4/6/2023	9:34:01 AM	Initial Processing	OK	TRAFFICUSER5	8 pgs	TRA642E9296C...	129096						
4/6/2023	9:29:33 AM	Initial Processing	OK	TRAFFICUSER5	8 pgs	TRA642E918BC...	129092						
4/6/2023	9:29:00 AM	Initial Processing	OK	TRAFFICUSER0	2 pgs	TRA642E90F5C...	129088						
4/6/2023	9:27:07 AM	Initial Processing	OK	TRAFFICUSER3	4 pgs	TRA642E9113C...	129089						
4/6/2023	9:25:27 AM	Initial Processing	OK	TRAFFICUSER0	6 pgs	TRA642E905EC...	129085						
4/6/2023	9:23:08 AM	Initial Processing	OK	TRAFFICUSER4	8 pgs	TRA642E9021C...	129084						
4/6/2023	9:22:50 AM	Initial Processing	OK	TRAFFICUSER0	2 pgs	TRA642E8F86C...	129077						
4/6/2023	9:20:08 AM	Initial Processing	OK	TRAFFICUSER2	6 pgs	TRA642E8F2DC...	129073						
4/6/2023	9:19:48 AM	Initial Processing	OK	TRAFFICUSER5	2 pgs	TRA642E8ED2C...	129072						
4/6/2023	9:19:21 AM	Initial Processing	OK	TRAFFICUSER4	8 pgs	TRA642E8F2DC...	129074						
4/6/2023	9:19:02 AM	Initial Processing	OK	TRAFFICUSER1	2 pgs	TRA642E8E46C...	129070						
4/6/2023	9:17:22 AM	Initial Processing	OK	TRAFFICUSER0	4 pgs	TRA642E8E46C...	129071						
4/6/2023	9:17:03 AM	Initial Processing	OK	TRAFFICUSER0	2 pgs	TRA642E8E3BC...	129064						
4/6/2023	9:16:17 AM	Initial Processing	OK	TRAFFICUSER0	2 pgs	TRA642E8D9DC...	129062						
4/6/2023	9:14:56 AM	Initial Processing	OK	TRAFFICUSER0	2 pgs	TRA642E8D9DC...	129061						
4/6/2023	9:14:25 AM	Initial Processing	OK	TRAFFICUSER0	2 pgs	TRA642E8D9DC...	129059						
4/6/2023	9:14:06 AM	Initial Processing	OK	TRAFFICUSER3	2 pgs	TRA642E8D7FC...	129058						
4/6/2023	9:13:47 AM	Initial Processing	OK	TRAFFICUSER0	2 pgs	TRA642E8D9DC...	129057						
4/6/2023	9:12:30 AM	Initial Processing	OK	TRAFFICUSER4	4 pgs	TRA642E8D9DC...	129060						
4/6/2023	9:10:50 AM	Initial Processing	OK	TRAFFICUSER0	2 pgs	TRA642E8C7CC...	129050						
4/6/2023	9:08:24 AM	Initial Processing	OK	TRAFFICUSER4	4 pgs	TRA642E8CA9C...	129049						
4/6/2023	9:05:05 AM	Initial Processing	OK	TRAFFICUSER5	2 pgs	TRA642E8E3BC...	129047						

Fax Insight provides administrators with metadata and historical information on all faxes within the Tactical Time Period. All data points can be used to filter down the required information for root cause analysis.

## Key Data Points

- Faxes - List of all faxes including status during Tactical Time Period
- Fax History - A flexible report that shows all records for faxes sent / received during Tactical Time Period

## User Insight

Group ID	User ID	User Name	Route Code	Total Faxes	Faxes Received	Received Sent	Total Pages	Earliest Fax	Most Recent Fax	Route
LNEW_USER_NEED_GRP...	ROI			6789	1	1	4	2/10/2023 3:43:15 PM	2/10/2023 3:43:15 PM	Route to RightFa
DEMO_TESTING	BDEROSSETT	Ben Squared		100	258	258	858	1/6/2023 4:39:23 PM	4/5/2023 4:46:49 PM	Route to Exchang
DEMO_TESTING	BDEROSSETT@	Ben Derossett		100	30	30	91	4/5/2023 4:43:57 PM	4/5/2023 4:43:57 PM	Route to Exchang
DOUG_DEMO	DOUG	Doug Byrne		5001	28	28	77	1/31/2023 12:48:18 PM	3/2/2023 10:36:55 AM	Route to Exchang
DOUG_DEMO	DOUG_HIPAA	Doug Hipaa		5015	2	2	4	1/31/2023 12:51:09 PM	3/2/2023 9:45:55 AM	Route to SMTP
DOUG_DEMO	DOUG_NETDIR	DOUG NETW...		5100	12	12	36	1/31/2023 12:50:34 PM	3/2/2023 10:36:55 AM	Route to file
DOUG_DEMO1	DOUG_DEMO_2	DOUG Exchan...		5013	5	5	13	1/31/2023 12:52:19 PM	3/2/2023 10:39:44 AM	Route to SMTP
EVERYONE	ADMINISTRATOR	Administrator		0	14	14	88	1/6/2023 5:10:44 PM	3/9/2023 12:47:45 PM	Route to RightFa
EVERYONE	AMPROD2			100	1	1	4	2/10/2023 3:41:03 PM	2/10/2023 3:41:03 PM	Route to RightFa
EVERYONE	BHOFFMAN			1776	145	145	484	1/6/2023 4:39:23 PM	4/5/2023 4:46:49 PM	Route to Exchang
EVERYONE	EPHESOFF_HE...	Ephesoff Healt...		5104	38	38	155	1/9/2023 2:32:24 PM	3/31/2023 12:18:51 PM	Route to file
EVERYONE	JANDREWS	Jonathan Andr...		1759	6	6	28	1/20/2023 2:31:32 PM	3/31/2023 12:18:14 PM	Route to Exchang
EVERYONE	JTA	Jonathan T. An...		1759	1	1	1	2/14/2023 5:05:44 PM	2/14/2023 5:05:44 PM	Route to Exchang
EVERYONE	NETDIR			100	30	30	90	1/9/2023 2:32:24 PM	3/31/2023 12:18:51 PM	Route to file
EVERYONE	TRAINING_USE...	Training User 1		1234	2	2	6	1/6/2023 5:10:20 PM	1/6/2023 5:14:18 PM	Route to RightFa
EVERYONE	WALKUP	Walkup		1000	1	1	2	3/30/2023 5:02:24 PM	3/30/2023 5:02:24 PM	Route to RightFa
EVERYONE	INTAKE_GRP	INTAKE_PHONE...		100	1	1	1	3/9/2023 12:47:30 PM	3/9/2023 12:47:30 PM	Route to RightFa
J&B	JEFF	Jeff Kunstler		5098	78	78	285	1/9/2023 2:30:47 PM	3/31/2023 12:18:51 PM	Route to SMTP
MEMORIAL_HOSPITAL	MM_FQ_3	MM_FQ_3		9993	1	1	1	2/16/2023 1:58:04 PM	2/16/2023 1:58:04 PM	Route to file
PCL_DSS_TEST	SAM	Sami Krasznai		5000	19	19	101	1/6/2023 4:38:40 PM	3/30/2023 11:36:11 AM	Route to Exchang
TRAFFICUSER	TRAFFICUSER0	Jack Bauer		3000	19616	19616	120078	1/24/2023 6:26:50 PM	4/6/2023 9:39:05 AM	Route to RightFa
TRAFFICUSER	TRAFFICUSER1	Walter White		3001	19698	19698	121656	1/24/2023 6:35:43 PM	4/6/2023 9:19:02 AM	Route to RightFa
TRAFFICUSER	TRAFFICUSER2	Dr. Gregory Ho...		3002	19413	19413	119514	1/24/2023 6:26:30 PM	4/6/2023 9:39:38 AM	Route to RightFa
TRAFFICUSER	TRAFFICUSER3	Ron Swanson		3003	19811	19811	123184	1/24/2023 6:25:29 PM	4/6/2023 9:47:35 AM	Route to RightFa
TRAFFICUSER	TRAFFICUSER4	Olivia Benson		3004	19589	19589	119819	1/24/2023 6:27:29 PM	4/6/2023 9:52:37 AM	Route to RightFa
TRAFFICUSER	TRAFFICUSER5	Randy Marsh		3005	19532	19532	120677	1/24/2023 6:26:30 PM	4/6/2023 9:47:16 AM	Route to RightFa
				6296	6296	6296	0			



User Insight provides information on which users are using the RightFax system (or systems). Delegate Roles provides a one stop view for seeing all delegate access and assigned rights for users.

## Key Data Points

- User Metrics - KPIs regarding users, including usage, fax history, and routing during Tactical Time Period
- Delegate Roles - A list of permissions by delegators and delegate roles (delegates)

# Annual Dashboard

## Volume Dashboard



The Volume Dashboard provides in-depth and near real-time information regarding the number of faxes and fax pages sent and received by a RightFax system (or multiple systems).

## Key Performance Indicators

- Total Faxes
- Total Document Pages
- Average Pages / Fax
- Average Seconds / Document Page
- Faxes Sent vs. Received

## Key Performance Indicators

- Fax Pages
- Average Pages / Fax
- Average Seconds / Page



- Transmitted Fax Pages

## Volume Indicators

- Top 10 Users
- Top 10 Groups
- Top 10 Destinations (for Sent Faxes)
- Top 10 Remote IDs (for Received Faxes)

## Health Dashboard



The Health Dashboard provides information regarding how well the RightFax system (or multiple systems) are processing faxes, including information on all failures and failure reasons.

## Key Performance Indicators

- Successful Faxes (Sent / Received)
- Failed Faxes (Sent / Received)
- Failure Rate (Sent / Received)
- Total Transmission Attempts
- Average Transmission Attempts per Fax

## Trend Information

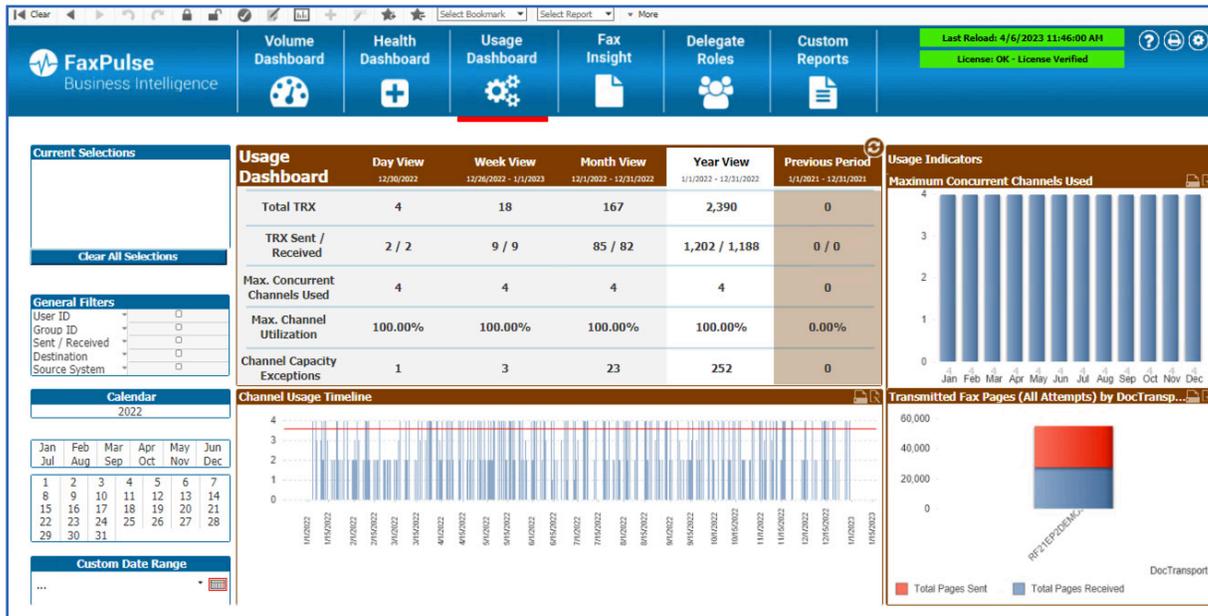
- Total Faxes
- Successful Faxes
- Failed Faxes



## Health Indicators

- Direction (Sent / Received)
- Result (Success / Failure)
- Failure Reasons

## Usage Dashboard



The Usage Dashboard provides information on how much of the RightFax system (or multiple systems) are in use as well as the peak traffic periods. It also provides the ability to set a Maximum Channel Utilization Threshold and count the number of capacity exceptions for a given time period.

## Key Performance Indicators

- Total Transmissions
- Transmissions (Sent / Received)
- Maximum Concurrent Channels Used
- Max. Channel Utilization (%)
- Channel Capacity Exceptions

## Trend Information

- Channel Usage

## Usage Indicators

- Maximum Concurrent Channels Used
- Transmitted Fax Pages by DocTransport (or Board Server)



## Fax Insight

Fax Insight provides administrators with information on all the fax metadata and fax history information, that can be used for ad-hoc reporting. All data points can be used to filter down the required information for root cause analysis.

## Reports

- Faxes
- Stats / Bill Codes
- Comments
- Fax History
- History – Approvals
- History – Conversions
- History – Denials
- History – File Routes
- History – Generic
- History – InterConnect
- History – Net Forward
- History – OCR
- History – Print
- History – Secure Docs
- History – Transmissions



## User Insight / Delegate Roles

**User Insight**

Group ID	User ID	Route Details	Route Type	Route Format	Route Format
!_A_TEST	TEST_DOCX_FCS	BDEROSSETT@ATIDEMO...	11 Route to Exchange		2 TIFF-G3
!_NEW_USER_NEED_GROUP	9175559776		0 Route to RightFax mailbox		2 TIFF-G3
!_NEW_USER_NEED_GROUP	BANK_ID		0 Route to RightFax mailbox		2 TIFF-G3
!_NEW_USER_NEED_GROUP	DID_ROUTING		0 Route to RightFax mailbox		2 TIFF-G3
!_NEW_USER_NEED_GROUP	JEFF2	JEFF@ATIDEMO.LOCAL	11 Route to Exchange		5 PDF
!_NEW_USER_NEED_GROUP	WEBINAR-WORKFLOW		74 -		2 TIFF-G3
ADMINS	BBELL	bbell@atidemo.local	11 Route to Exchange		5 PDF
ATHENA	ATHENA_INBOX	UNC//ATHENA_EMF_FAXES	4 Route to file		2 TIFF-G3
DEMO TESTING	BDEROSSETT	bderossett@atidemo.local	11 Route to Exchange		5 PDF
DOUG DEMO	DOUG	doug@atidemo.local	11 Route to Exchange		2 TIFF-G3
DOUG DEMO	DOUG_APPROVED		0 Route to RightFax mailbox		2 TIFF-G3
DOUG DEMO	DOUG_HIPAA	DOUG@ATIDEMO.LOCAL	12 Route to SMTP		13 WebDeliveryoption
DOUG DEMO	DOUG_NETDIR	\\ATIDEMORDS01\C\$\US...	4 Route to file		5 PDF
DOUG DEMO	DOUG_WF		74 -		2 TIFF-G3
DOUG DEMO1	DOUG DEMO 2	DOUG@ATIDEMO.LOCAL	12 Route to SMTP		5 PDF
EVERYONE	2068121247	C:\_SCAN_TO_NEXTGEN...	4 Route to file		5 PDF
EVERYONE	ADMINISTRATOR		0 Route to RightFax mailbox		2 TIFF-G3
EVERYONE	BHOFFMAN	BHOFFMAN@ATIDEMO.L...	11 Route to Exchange		2 TIFF-G3
EVERYONE	BSOLLARS@ATIDEMO.L...		74 -		2 TIFF-G3
EVERYONE	DEMOSERVICES		0 Route to RightFax mailbox		2 TIFF-G3
EVERYONE	EPHESOFTHALTHCARE	\\EP20DEMO01\HEALTHC...	4 Route to file		5 PDF
EVERYONE	EPHESOFTHALTHCAR...	\\EP20DEMO01\HEALTHC...	4 Route to file		5 PDF
EVERYONE	EPICSYS		0 Route to RightFax mailbox		2 TIFF-G3
EVERYONE	FORM_INTAKE		0 Route to RightFax mailbox		2 TIFF-G3
EVERYONE	JANDREWS	jandrews@atidemo.local	11 Route to Exchange		5 PDF
EVERYONE	JEFF-WF1	\\ATIDEMORDS01\SHARE...	4 Route to file		5 PDF
EVERYONE	MEDELMAN	medelman@atidemo.local	11 Route to Exchange		5 PDF
EVERYONE	MSKAIKAY	mskikay@atidemo.local	11 Route to Exchange		5 PDF

User Insight provides information on which users are using the RightFax system (or systems). Delegate Roles provides a one stop view for seeing all delegate access and assigned rights for users.

## Reports

- User Metrics
- User Routing
- User Usage



## Ad-Hoc Reporting / Export to Excel

All fields in FaxPulse are available as filters for narrowing down on important data, especially for root cause analysis. All data grids and data from charts can be exported to excel by right-clicking anywhere on the grid and choosing **“Send to Excel”**.

D	V	P	Date / Time	Unique ID	Status	Error	Fax Number / Email / ID	Pages	Owner ID	Fax Handle	Is Deleted?
8/18/2022	6:05:08 PM		BHO62FE7F87015F	OK	OK			4 pgs	BHOFFMAN	3274 N	
8/18/2022	3:25:56 PM		BHO62FE5A1F015D	OK	OK			4 pgs	BHOFFMAN	3270 N	
8/18/2022	3:25:55 PM		BHO62FE5A1F015C	OK	OK			4 pgs	BHOFFMAN	3269 N	
8/18/2022	10:44:00 AM		BHO62FE18170148	OK	OK			4 pgs	BHOFFMAN	3246 N	
8/18/2022	10:43:30 AM		BHO62FE17F80147	OK	OK			2 pgs	BHOFFMAN	3244 N	
8/18/2022	10:43:11 AM		BHO62FE17DA0145	OK	OK			2 pgs	BHOFFMAN	3242 N	
7/18/2022	5:14:18 PM		BHO62D59518004B	OK	OK			4 pgs	BHOFFMAN	2945 N	
7/18/2022	5:14:18 PM		BHO62D59519004C	OK	OK			4 pgs	BHOFFMAN	2946 N	
7/18/2022	4:01:00 PM		BHO62D583DA0046	OK	OK			2 pgs	BHOFFMAN	2940 N	
7/18/2022	3:47:01 PM		BHO62D580910043	OK	OK			2 pgs	BHOFFMAN	2937 N	
7/18/2022	2:07:19 PM		BHO62D5693A003F	OK	OK			4 pgs	BHOFFMAN	2932 N	
7/18/2022	2:07:19 PM		BHO62D5693B0040	OK	OK			4 pgs	BHOFFMAN	2933 N	
7/18/2022	2:06:57 PM		BHO62D5691C003D	OK	OK			4 pgs	BHOFFMAN	2928 N	
7/18/2022	2:06:57 PM		BHO62D5691C003E	OK	OK			4 pgs	BHOFFMAN	2929 N	
3/18/2022	5:31:04 PM		BHO6234C1FB669C	OK	OK			4 pgs	BHOFFMAN	1132 N	
3/18/2022	5:31:03 PM		BHO6234C1FB669B	OK	OK			4 pgs	BHOFFMAN	1131 N	
3/18/2022	5:29:12 PM		BHO6234C1826696	OK	OK			4 pgs	BHOFFMAN	1127 N	
3/18/2022	5:18:44 PM		BHO62348F296693	OK	OK			4 pgs	BHOFFMAN	1124 N	
3/18/2022	5:16:50 PM		BHO62348EB16691	OK	OK			4 pgs	BHOFFMAN	1121 N	
2/18/2022	8:13:07 AM		BHO620F552E3631	OK	OK			4 pgs	BHOFFMAN	896 N	
2/18/2022	8:12:46 AM		BHO620F552D3630	OK	OK			4 pgs	BHOFFMAN	895 N	



# FaxPulse MA Overview

FaxPulse Monitoring and Alerting provides a single pane of glass through which administrators can review the current system status. Monitoring includes RightFax services and processes, fax indicators (volume, status, age) and more.

Thresholds for all metrics can be customized for the client's specific requirements. Administrative emails are generated whenever a metric falls outside of the accepted range and (optional) when metrics fall back into their accepted range or issues are resolved in the RightFax system.

## Application Architecture

FaxPulse MA is designed to run on a separate server from RightFax. The Cards and System Monitors are all accessible via web browser. The pages are secured, but users are not bound by number of licenses, meaning multiple administrators can access the monitors.

## Data Loading and Storage

FaxPulse MA works by reading critical data from selected meters in the RightFax system. It does not store data locally. These readings are refreshed on a configurable schedule. The status of alerts in the Current Alerts Card is refreshed once metrics go back to their accepted thresholds or issues are resolved.

# FaxPulse MA Dashboards

FaxPulse MA dashboards consist of a series of Cards which monitor key metrics from the RightFax system(s), FaxPulse system, and alert statuses for failed or at-risk processes.

## Page Layout

The pages in FaxPulse Monitoring and Alerting have a consistent design. The top left corner of each page has navigation buttons, allowing users to move from the home page to FaxPulse MA system status and to each RightFax system(s). On the top right of the page, there are navigation buttons to access other FaxPulse apps on your account as well as the FaxPulse Configurator. The content on the rest of the page depends on whether you are on the home page, FaxPulse MA system status page, or a specific RightFax system page.

## Dashboards

The system dashboards can be broken down into three principal areas: the Status Card (top center), the Current Alerts Card in the Overview and System Dashboards (just below), and Monitor Cards (below the Alerts Card). Statuses throughout the dashboards are color coded: green means active or running correctly; blue means loading; and red indicates an error.



## Alerts

Every monitor within FaxPulse MA comes with configurable alerts. These can be set up within each monitor and customized in the FaxPulse Configurator (see page 49 for Alert Groups settings). Alerts in FaxPulse MA notify administrators when a meter’s value goes beyond a specified threshold or when a system failure occurs. Alerts can also be set to notify users when issues are resolved and monitors are back to their correct status. FaxPulse 2023 alerts can be configured along the following settings in the Configurator:

- **Alerts:** This defines what alerts are sent to users (upon detecting issues and/or resolution). They are set up within each monitor configuration form.
- **Alert Groups:** This defines which groups of users are alerted to the configured alerts. Alert groups can be configured by Email Address(es), Alert Email Subject, Alert Email Body, Resolution Email Subject, Resolution Email Body.
- **Alert Schedules:** This defines at what dates and times alerts can be sent to users (upon detecting issues and/or resolution). They are set up within the Configurator.
- **Holidays:** This setting found within the Configurator can be set up to mute alerts during holidays.

## Alert Emails

Alert emails for FaxPulse MA contain critical information about specific alerts within a data reload. This information includes the monitor name, value, date/time of alert, and the target or source.


FaxPulse

Attention! The following alerts have been generated for your RightFax systems:

[Go to FaxPulse MA](#)

Monitor Name	Monitor Value	Raised	Target
In conversion	171	3/23/2023 3:55:30 PM	rf21ep2demo011050
In conversion	183	3/23/2023 3:55:33 PM	rf21ep2demo011141

To check health of your services monitored by FaxPulse Monitoring & Alerting, visit the [FaxPulse MA Dashboard](#).

If you no longer wish to receive these notifications, please open the [Fax Pulse Configurator](#) and change your alert settings. Only FaxPulse Administrators can change these settings.



## Resolution Emails

Alert emails for FaxPulse MA contain critical information about specific alerts after they have fallen within their threshold or when system errors have been resolved. This information includes the monitor name, value, date/time of alert, date/time of resolution, and the target or source. They may also contain Active Alerts that have yet to be resolved.

 **FaxPulse**

The following alerts have been generated for your RightFax systems:

[Go to FaxPulse MA](#)

### Resolved Alerts

Monitor Name	Monitor Value	Raised	Resolution	Target
In conversion	0	3/23/2023 3:55:33 PM	3/23/2023 4:23:33 PM	rf21ep2demo011141

### Active Alerts

Monitor Name	Monitor Value	Raised	Target
Scheduled to be sent	710	3/23/2023 10:52:28 AM	rf21ep2demo011050
Scheduled to be sent	710	3/23/2023 11:43:28 AM	rf21ep2demo011141

To check health of your services monitored by FaxPulse Monitoring & Alerting, visit the [FaxPulse MA Dashboard](#).

If you no longer wish to receive these notifications, please open the [Fax Pulse Configurator](#) and change your alert settings. Only FaxPulse Administrators can change these settings.



# Overview Dashboard

The screenshot shows the FaxPulse Monitoring & Alerting dashboard. Key components are highlighted with red boxes:

- App Navigation / Configurator Buttons:** Located in the top right corner, containing a grid icon and a settings gear icon.
- Navigation Buttons:** Located in the top left corner, containing a home icon, a list icon, and a settings icon.
- FaxPulse MA System Status:** A central card displaying system status information.
- System Status:** A card in the top right showing Service Status (All Systems Go), Meter Status (All Systems Go), and Card Status (Cards Updated), with a Details button.
- Current Alerts Grid:** A table listing alerts with columns for Name, Status, and Alert Created On. It shows two entries: "Scheduled to be sent" (4/3/2023 6:19:37 PM) and "Initializing" (4/6/2023 5:04:26 AM).
- View System Button:** A button located under the "Systems" section for the "rf2lep2demo01" system.
- Confidence Bar:** A bar indicating the last refresh time of the data, shown as "4/6/2023 1:27:57 PM".
- Channel Utilization Grid:** A line graph showing channel utilization over time, with a grid overlay.
- In Process Faxes:** A card showing 1355 in process faxes with a "See all" link.
- Documents Queued:** A card showing 0 documents queued with a "See all" link.

The Overview Dashboard provides a bird's eye view of Alerts and FaxPulse MA system status as well as a real-time view of Channel Utilization. Each Card comes with a Confidence Bar which tells users when the data was last refreshed.

## Navigation

The Home Page provides a bird's eye view of Alerts and FaxPulse MA system status as well as a real-time view of Channel Utilization. Each Card comes with a Confidence Bar which tells users when the data was last refreshed.

To navigate to another FaxPulse app, there is an App Navigation Button in the top right corner. To navigate to the FaxPulse Configurator, click the Settings Button in the top right corner next to the App Navigation Button. To navigate to a System Dashboard, users can use the View System Button located under the Home Page Button and FaxPulse MA System Status Button in the top left corner. They can also select "View System" from the Systems Card (bottom center of the page). To navigate to the FaxPulse MA System Dashboard, users can select the button under the Overview Button on the top corner of the page.



# System Dashboard(s)

## Monitors

Each System Dashboard displays information pertaining to one RightFax server. It is organized with Cards. These individual sections on the dashboard display key information pertaining to the **monitors** set up in your FaxPulse Configurator (see page 35 for the Configurator and settings for Monitors). Cards have a consistent layout throughout and come with their own Confidence Bars to let users know when the data was last read by the monitor.

## System Status

The System Status Monitor sits at the top right corner of the dashboard. The Card displays three items:

- **System Status** tells administrators FaxPulse MA is running correctly.
- **Meter Status** tells administrators FaxPulse MA meters are running correctly.
- **Card Status** tells administrators their Cards are updated with the current data load.

## Current Alerts

The Current Alerts Monitor acts as the diagnostic display in FaxPulse MA. It displays all current meters that are not within their configured thresholds as well as system service errors from RightFax. It contains all of these Alerts as long as they are active. If a meter falls back into the configured threshold, the alert will no longer be on the Card. The Card also shows exactly when the alert was first created and contains a Confidence Bar.

## Channel Utilization

The Channel Utilization Monitor is another diagnostic display showing the amount of channels in use in near-real time. It also distinguishes channel use by Sending and Receiving, so administrators can accurately see how much of their channel capacity is being used for each.

## System Metrics

The System Metrics Monitor displays three key items for keeping track of your fax transmissions:

- **Documents Queued** monitors the number of documents that are queued for transmission but have not made an attempt to be sent.
- **Status Records Queued** monitors the number of Doc Transport status records (details about Doc Transport actions) queued for transmission to the RightFax Server Module.
- **File Route** monitors the File Route History for any file routing errors.

## Fax Volume

The Fax Volume Monitor tracks the number of faxes that match a given criteria. You can define various criteria to get alerts if the number of faxes during a specific time period is out of range.



## File Count

The File Count Monitor looks over a specific path or directory. It is configured to monitor files with a specific file extension (like .fcl) and count how many are present in that path.

## File Age

The File Age Monitor also looks over a specific path or directory. It is configured to monitor files with a specific file extension (like .fcl) and count how long they have been present in that path.

## In Process Faxes

The In Process Faxes Monitor gives administrators an inside-view of key processes in the RightFax system. The Card displays each individual process monitor as well as the volume of faxes currently in that process. It can be configured with up to 19 specific monitors with configurable thresholds.

## Services

Part of the Server Metrics section of the dashboard, the Services Monitor displays the uptime status of key RightFax services. These include 20+ specific modules and work servers.

## Server Metrics

The Server Metrics Monitor displays two key points of data: CPU Usage and Image Folder Space in the RightFax server. It can be configured to alert users at specified thresholds just like every other monitor.

## Channels

The Channels Monitor displays the current number of channels as well as their status. It can be configured to display Active Channels, Offline Channels, Receiving Channels, Sending Channels, and Total Channels.



# FaxPulse System Status Dashboard

## Monitors

The Fax Pulse System Status Dashboard displays information pertaining to the FaxPulse system. It is organized with Cards. Cards have a consistent layout throughout and come with their own Confidence Bars to let users know when the data was last read by the monitor.

## Services Status

The Services Status Monitor displays the status of four FaxPulse system services: FaxPulse Monitor Service, QlikView Distribution Service, QlikView Management Service, and the FaxPulse Maintenance Service.

## Meter Status

The Meter Status Monitor displays the status of every meter configured for monitoring in FaxPulse MA. This status information includes: Status, Meter Name, Source (Server), and Details (last reading, next reading, and warning threshold).

Meter Status <span style="color: green; font-weight: bold;">OK</span>		Card Load: <span style="color: green; font-weight: bold;">4/18/2023 11:34:49 AM</span>	
Status	Name	Source	Details
<span style="color: blue;">🔔</span> Waiting to Run	Documents Queued	rf21ep2demo01	<ul style="list-style-type: none"> <li>Last: 4/18/2023 11:34:39 AM</li> <li>Next: 4/18/2023 11:35:39 AM</li> <li>Warning: 4/18/2023 11:39:39 AM</li> </ul>
<span style="color: blue;">🔔</span> Waiting to Run	Status Records Queued	rf21ep2demo01	<ul style="list-style-type: none"> <li>Last: 4/18/2023 11:34:39 AM</li> <li>Next: 4/18/2023 11:35:39 AM</li> <li>Warning: 4/18/2023 11:39:39 AM</li> </ul>
<span style="color: blue;">🔔</span> Waiting to Run	File Route	rf21ep2demo01	<ul style="list-style-type: none"> <li>Last: 4/18/2023 11:34:38 AM</li> <li>Next: 4/18/2023 11:44:38 AM</li> <li>Warning: 4/18/2023 11:49:38 AM</li> </ul>
<span style="color: blue;">🔔</span> Waiting to Run	Initializing	rf21ep2demo01	<ul style="list-style-type: none"> <li>Last: 4/18/2023 11:34:38 AM</li> <li>Next: 4/18/2023 11:35:38 AM</li> <li>Warning: 4/18/2023 11:39:38 AM</li> </ul>
<span style="color: blue;">🔔</span> Waiting to Run	Information Incomplete	rf21ep2demo01	<ul style="list-style-type: none"> <li>Last: 4/18/2023 11:34:38 AM</li> <li>Next: 4/18/2023 11:35:38 AM</li> <li>Warning: 4/18/2023 11:39:38 AM</li> </ul>

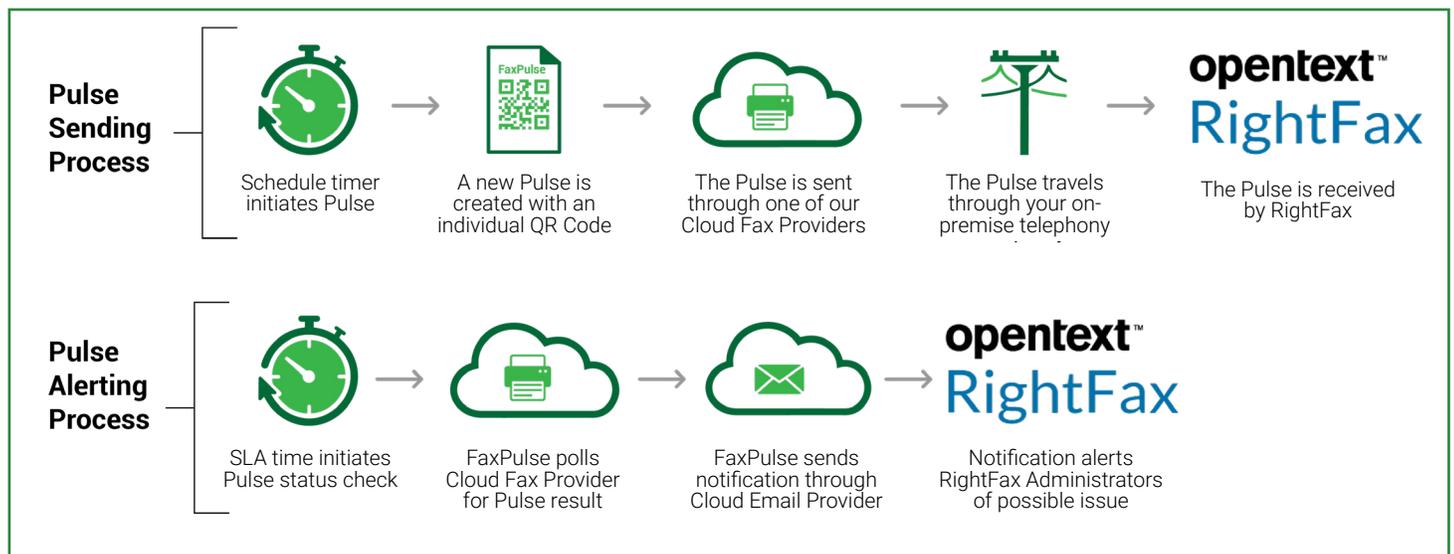


# FaxPulse AI Overview

FaxPulse Automated Inbound is an monitoring service designed specifically to monitor inbound fax availability. It allows administrators to automate their inbound testing in order to resolve issues as they occur.

It works by sending Pulses (single-page faxes with a QR code) through the RightFax system on a configurable schedule. When transmissions fail, administrators receive email notifications alerting them to possible errors occurring in the RightFax system.

## How FaxPulse AI Works



## Pulses

FaxPulse AI sends Pulses (single-page faxes with a QR code) in order to test for inbound availability. To the right is a sample of a Pulse:





## Standard vs Advanced Check

FaxPulse AI sends Pulses on a configurable schedule, and alerts are generated at the end of each Pulse test. The standard FaxPulse AI check will only notify users of a Pass/Fail status of the Pulse, meaning the Pulse has passed or filed a Transmission Check. With Advanced Check configured, user can get information on several other inbound workflow results (see page 33).

Advanced Check requires that the FaxPulse AI Listener Service is installed on your RightFax Server. FaxPulse AI uses this Listener to ensure that a Pulse is in the RightFax Database, rather than just transmitting successfully into RightFax. The Listener is configured to watch a particular inbox and checks with FaxPulse AI via the FaxPulse API for new fax Pulses.

## Pass Notifications

Pass notifications let administrators know that the system is available to receive inbound faxes. There are 5 pieces of Information found within this notification: Account Name, Contact Name, Fax Number, Attempt Date, Pulse ID, and Results. Note, the results section will vary based on which Advanced Checks are configured.



**Sample Company**

**FaxPulse AI Pulse Results**  
Attempt Date: 04/01/2023 12:00:00

**Contact Name:**  
John Smith

**Fax Number:**  
555-555-5555

**Pulse Id:**  
<Unique Pulse GUID>

**Results:**  
Transmission Check: OK  
RightFax Server: OK  
RightFax Web API: OK  
XML Generator: OK  
Email Routing: OK  
File Routing: OK



## Failure Notifications

Failure notifications let administrators know that the system is unavailable to receive inbound faxes. There are 5 pieces of Information found within this notification: Account Name, Contact Name, Fax Number, Completion Date, Pulse ID, and Results. Note, the results section will vary based on which Advanced Checks are configured.


FaxPulse  
Automated Inbound

**Sample Company**

**FaxPulse AI Pulse Results**  
 Attempt Date: 04/01/2023 12:00:00

**Contact Name:**  
John Smith

**Fax Number:**  
555-555-5555

**Pulse Id:**  
<Unique Pulse GUID>

**Results:**  
 Transmission Check: Fail  
 RightFax Server: OK  
 RightFax Web API: Fail  
 XML Generator: Fail  
 Email Routing: Fail  
 File Routing: Fail

## Results

The Results section of FaxPulse AI notifications give administrators a view into where inbound workflow errors are occurring, whether that be faxes not reaching their final folder destination or not being emailed via RightFax routing to the right user. Below are the six checks available with Advanced Check.

- **Transmission Check** verifies that a Pulse has successfully transmitted into RightFax.
- **RightFax Server** checks that a Pulse has reached the Listeners Configured inbox and is available for processing.
- **RightFax Web API** verifies that the Web API is running by using it to check that the Pulse is in the Listener's inbox.
- **XML Generator** checks that a specific Pulse has had an XML generated by the XML Generator.
- **Email Routing** checks that a specific Pulse has been routed to a specified email inbox.
- **File Routing** checks that a specific Pulse has been routed to the configured directory.



## Rollup Emails

In addition to scheduled notification for Pass / Fail inbound testing, FaxPulse AI also sends a weekly email with the aggregated results of the previous seven days in order to help administrators review and report inbound availability as part of their maintenance. Below is an example of a weekly Rolling Email.



**Name** FaxPulse AI Roll Up

Contract Expiration Date: 2/17/2142 12:00 AM

**Service Summary**

8/24/2022 2:00:00 PM - 8/31/2022 2:00:00 PM (ET)

**Destination:**  
9173861759

- Pulse Frequency:  
Every 15 minutes

483	480	0	3
Sent	Received	Completed	Failed

**Definitions**

- **Pulse** : An attempt to reach the specified system
- **Sent** : The number of pulses sent out to the system.
- **Received** : The number of pulses that have been successfully received by the system.
- **Completed** : The number of pulses that have passed all the workflow checks if any.
- **Failed** : The number of pulses that failed during transmission or in any workflow checks.



# FaxPulse Configurator

## Overview

The FaxPulse Configurator works as the primary settings and administrative console for FaxPulse. From this one platform, administrators can: create monitors and alerts for FaxPulse MA; set up alert groups; set yearly data set for FaxPulse BI's Annual Dashboard, and more.

It is restricted to administrators, and it can be accessed view web in FaxPulse 2023.

### Overview Dashboard

The Overview Dashboard works as the “Home page” for the Configurator. This is where you can adjust account settings, alert groups, schedules, and add your systems and servers. There are easy navigation tools throughout the page. The menu is on the top left of the page and gives users access to settings, alerts, and each individual server currently onboarded into FaxPulse. The grid menu on the top right corner allows users to navigate to the FaxPulse applications. The settings button next to the grid opens up the account settings.

The screenshot displays the FaxPulse Account Overview dashboard. At the top left is the FaxPulse logo and a hamburger menu icon. At the top right are a grid icon and a settings gear icon. The main content area is titled "Account Overview" and is divided into two columns.

**Left Column: Account Info**

Item	Value
Customer Name	
License Code	
License Expiration	11/30/2025 12:00:00 AM
License Info	OK - License Verified
Product Code	Enterprise Server

There is a "+ System" button next to the Account Info section.

**Right Column: Account Settings, Alert Groups, and Alert Schedules**

- Account Settings** (gear icon) with an "Open" button.
- Alert Groups** (people icon) with an "Open" button.
- Alert Schedules** (calendar icon) with an "Open" button.



## FaxPulse Settings

Name	Value	Actions
Enable Alerts	Yes	<a href="#">✎</a>
Document Path	D:\FaxPulse\	<a href="#">✎</a>
Monitoring Server	dc1prfvap0001	<a href="#">✎</a>
Refresh Interval (minutes)	1	<a href="#">✎</a>
Logging Level	Normal	<a href="#">✎</a>
Time Zone	Eastern Time (US & Canada)	<a href="#">✎</a>
License Code	242455690	<a href="#">✎</a>
From Email	Faxpulse@atidemo.local	<a href="#">✎</a>
SMTP Host	atidemoex01	<a href="#">✎</a>
SMTP Port	25	<a href="#">✎</a>
Configurator Link	http://localhost:8080/FaxPulse	<a href="#">✎</a>
BI Link	http://fp23dev01/QvAJAXZfc/opendoc.htm?document=documentsdev%5Cfaxpulse%20bi.qvw	<a href="#">✎</a>
BI Link - Annual	http://fp23dev01/QvAJAXZfc/opendoc.htm?document=documentsdev%5Cfaxpulse%20bi_annual.qvw	<a href="#">✎</a>
MA Link	http://fp23dev01:8080/FaxPulseMA	<a href="#">✎</a>
Load Days	90	<a href="#">✎</a>
Maximum Channel Utilization	65%	<a href="#">✎</a>
Customer Name	ADP	<a href="#">✎</a>
Page Refresh Interval (minutes)	1	<a href="#">✎</a>
SMTP UserName	FaxPulse@atidemo.local	<a href="#">✎</a>
SMTP Password	pass	<a href="#">✎</a>
SMTP Secure Socket Option	Auto	<a href="#">✎</a>
Archive Year	2022	<a href="#">✎</a>
Certificate Override	All	<a href="#">✎</a>
Authenticate SMTP Connection	False	<a href="#">✎</a>
AI	FaxPulseAI	<a href="#">✎</a>

Basic settings and configurations options for FaxPulse.



Field / Button	Description
<b>Enable Alerts</b>	Allow alerts for system monitors
<b>Document Path</b>	Path to the FaxPulse files
<b>Monitoring Server</b>	Host name of server performing monitoring of RightFax systems (typically the FaxPulse server)
<b>Refresh Interval (in minutes)</b>	Amount of time FaxPulse waits between Meter reads
<b>Logging Level</b>	Amount of detail recorded into the Event Viewer <ul style="list-style-type: none"> <li>• None</li> <li>• Normal</li> <li>• Verbose</li> </ul>
<b>Time Zone</b>	The time zone adjustment that will translate RightFax dates / times into local format
<b>License Code</b>	FaxPulse license code
<b>From Email</b>	Email address used for sending email alerts to administrators
<b>SMTP Host</b>	SMTP host used for relaying email alerts
<b>SMTP Port</b>	Selected port number
<b>Configurator Link</b>	URL for Configurator homepage
<b>BI Link</b>	URL for FaxPulse Business Intelligence - Tactical Dashboard homepage
<b>BI Link Annual</b>	URL for FaxPulse Business Intelligence - Annual Dashboard homepage
<b>MA Link</b>	URL for FaxPulse Monitoring and Alerting
<b>Load Days</b>	Number of days recorded in Tactical Dashboard
<b>Maximum Channel Utilization</b>	Threshold for channel capacity exceptions
<b>Customer Name</b>	Company name
<b>Page Refresh Interval</b>	Amount of time FaxPulse waits between refreshing the page
<b>SMTP Username</b>	SMTP username used to send alerts
<b>SMTP Password</b>	SMTP password used to send alerts
<b>SMTP Secure Socket Option</b>	SMTP socket option to send alerts
<b>Archive Year</b>	Indicates what year reloads in FaxPulse BI Annual Dashboard
<b>Certificate Override</b>	Allows system to ignore common SSL errors
<b>Authenticate SMTP Connection</b>	Switch for authenticating SMTP Connection
<b>AI</b>	Link to FaxPulse AI



## Add RightFax System

Select the Add System Button **+ System** in the Account Overview section of the Configurator homepage to open the Add RightFax System form.

Field / Button	Description
<b>System Name</b>	Display name for the RightFax system. Available as a filter in FaxPulse BI and FaxPulse MA for selecting data from one system
<b>Total Channels</b>	Total number of channels on all RightFax servers for the system
<b>System Version</b>	RightFax version
<b>Start Date</b>	Earliest date that FaxPulse will pull data from the RightFax database
<b>ADO Connection String</b>	ADO Connection String for the RightFax database
<b>OLEDB Connection String</b>	OLEDB Connection String for the RightFax database



## Add System Monitor

The screenshot shows the 'Create System Meter' form in the FaxPulse interface. The form is titled 'Create System Meter' and is located in the main content area. The left sidebar contains navigation options: Overview, Settings, Alert Groups, Alert Schedules, and Systems. The Systems section is expanded, showing a list of systems: rf2lep2demo01, rfctest19041556, rfctest19041559, and rfctest19041610. The form fields are as follows:

- Meter Name: Documents Queued (dropdown)
- Meter Description Name: Documents Queued (text input)
- Error Threshold: (empty text input)
- Gauge Direction:  Over Threshold,  Under Threshold
- Email On Error:  Yes,  No
- Email On Resolution:  Yes,  No
- Alert Group: Default (dropdown)
- Alert Schedule: Default 24/7 (dropdown)

A blue 'Create' button is located at the bottom of the form. The footer of the page shows '2023 © FaxPulse'.

Select the Add System Monitor Button **+ System Monitor** from the Server homepage to open the Create System Meter form.

This menu allows you to set up 3 types of System Monitors:

- Documents Queued
- Status Records Queued
- File Route



## Add Fax Volume Monitor

Select the Add Fax Volume Monitor Button  from the Server homepage to open the Fax Volume Monitor form.

Fax Volume Monitors track the number of faxes that match the criteria entered over the requested period and compares it to the chosen threshold to make sure that RightFax is working as expected.

Field / Button	Description
<b>Name</b>	Friendly name of the Fax Volume Monitor
<b>Error Threshold</b>	Number of faxes that will indicate a system error
<b>Gauge Direction</b>	Direction used to compare the count to the chose thresholds: <ul style="list-style-type: none"> <li>• Over Threshold</li> <li>• Under Threshold</li> </ul>
<b>Email on Error</b>	Check the box to receive an email if a system error condition exists
<b>Email on Resolution</b>	Check the box to receive an email if a system error condition no longer exists



<b>RightFax User</b>	Select one RightFax User to monitor or choose ALL
<b>RightFax Group</b>	Select one RightFax Group to monitor or choose ALL
<b>Fax Direction</b>	Select the direction of the fax (relative to the PSTN): <ul style="list-style-type: none"> <li>• ALL</li> <li>• Received</li> <li>• Sent</li> </ul>
<b>Final Fax Status</b>	Select one final status of the faxes or choose ALL: <ul style="list-style-type: none"> <li>• ALL</li> <li>• OK</li> <li>• Error</li> </ul>
<b>Error Message</b>	Select one error message or choose ALL
<b>Time Frame</b>	Number and units indicating the timespan over which FaxPulse uses to calculate fax volume: <ul style="list-style-type: none"> <li>• Minute</li> <li>• Hour</li> <li>• Day</li> <li>• Month</li> <li>• Year</li> </ul>
<b>Time</b>	Units for indicating the time frame (ex. 5 minutes)
<b>Alert Group</b>	Alert Group(s) to receive alerts for monitor
<b>Alert Schedule</b>	Alert Schedule for receiving alerts for monitor



## Add In-Process Faxes System Monitor

The screenshot shows the 'Create In Process Faxes Meter' form. The 'Meter Name' is 'In Process Faxes'. The 'Status' is set to 'Initializing'. The 'Meter Description Name' is also 'Initializing'. The 'Error Threshold' field is empty. For 'Gauge Direction', both 'Over Threshold' and 'Under Threshold' are unselected. For 'Email On Error' and 'Email On Resolution', 'No' is selected. The 'Alert Group' is 'Default' and the 'Alert Schedule' is 'Default 24/7'. A blue 'Create' button is located at the bottom left of the form.

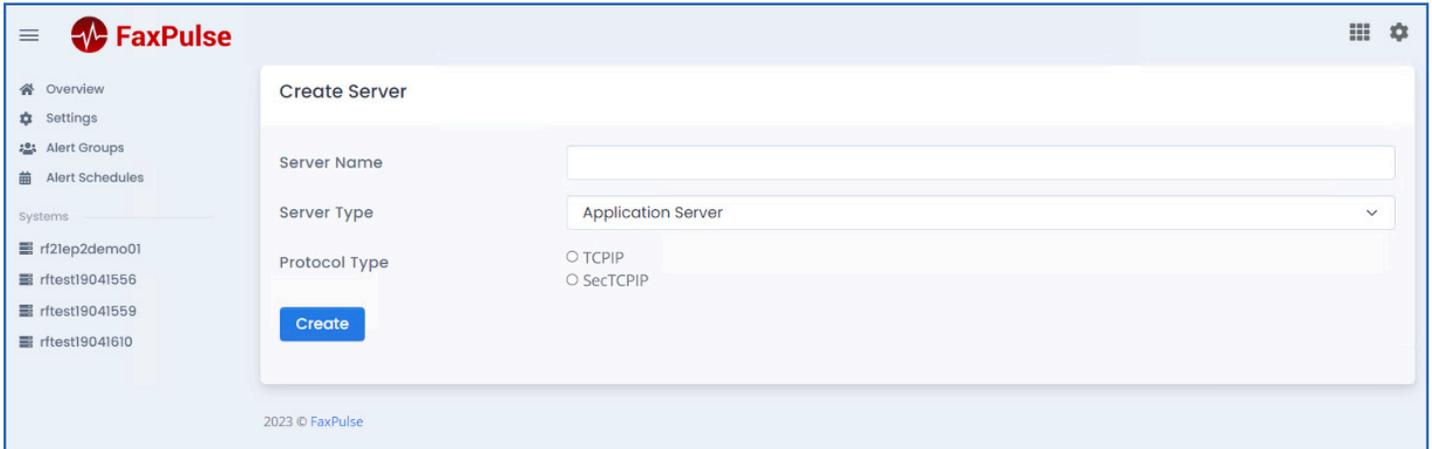
Select the Add In-Process Monitor Button + In Process Monitor from the Server homepage to open the Create In-Process Faxes Meter form.

The In-Process Faxes System Monitors track the number of faxes in every stage of their RightFax lifecycle.

Field / Button	Description
<b>Status</b>	The stage in the RightFax lifecycle of an in-process fax
<b>Error Threshold</b>	Number of faxes that will indicate a system error
<b>Gauge Direction</b>	Direction used to compare the count to the chose thresholds: <ul style="list-style-type: none"> <li>• Over Threshold</li> <li>• Under Threshold</li> </ul>
<b>Email on Error</b>	Check the box to receive an email if a system error condition exists
<b>Email on Resolution</b>	Check the box to receive an email if a system error condition no longer exists
<b>Alert Group</b>	Alert Group(s) to receive alerts for monitor
<b>Alert Schedule</b>	Alert Schedule for receiving alerts for monitor



## Add RightFax Server



Select the Add Server Button **+ Server** from the Server homepage to open the Create Server form.

Field / Button	Description
<b>Server Name</b>	Host name of the RightFax Server
<b>Server Type</b>	Role of the RightFax server in the system: <ul style="list-style-type: none"> <li>• Application Server</li> <li>• Remote DocTransport</li> <li>• Application Server (No DocTransport)</li> </ul>
<b>Protocol Type</b>	TCPIP or SecTCPIP



## Add File Count Monitor

**Create Server Meter**

Meter Name: Files Count

Meter Description Name: Files Count

Folder Path: [Empty]

File Extension: Ex: \*.fcl\*,\*.txt\*

Error Threshold: [Empty]

Gauge Direction:
   
 Over Threshold
   
 Under Threshold

Email On Error:
   
 Yes
   
 No

Email On Resolution:
   
 Yes
   
 No

Alert Group: Default

Alert Schedule: Default 24/7

**Create**

2023 © FaxPulse

Select the Add File Count Monitor Button **+ File Count Monitor** from the Server homepage to open the Create Server Meter form.

Field / Button	Description
<b>Meter Name</b>	Type of server monitor to add
<b>Meter Description Name</b>	Name of meter within dashboard
<b>Folder Path</b>	Path to the folder being monitored
<b>File Extension</b>	Extension of the files FaxPulse is counting
<b>Error Threshold</b>	Number of faxes that will indicate a system error
<b>Gauge Direction</b>	Direction used to compare the count to the chose thresholds: <ul style="list-style-type: none"> <li>• Over Threshold</li> <li>• Under Threshold</li> </ul>
<b>Email on Error</b>	Check the box to receive an email if a system error condition exists
<b>Email on Resolution</b>	Check the box to receive an email if a system error condition no longer exists
<b>Alert Group</b>	Alert Group(s) to receive alerts for monitor
<b>Alert Schedule</b>	Alert Schedule for receiving alerts for monitor



## Add File Age Monitor

**Create Server Meter**

Meter Name: File Age

Meter Description Name: File Age

Folder Path:

File Extension: Ex: \*.fcl\*,\*.bt\*

FileAge Interval (in minutes): Enter in minutes

Error Threshold:

Gauge Direction:  Over Threshold  Under Threshold

Email On Error:  Yes  No

Email On Resolution:  Yes  No

Alert Group: Default

Alert Schedule: Default 24/7

**Create**

Select the Add File Age Monitor Button **+ File Age Monitor** from the Server homepage to open the Create Server Meter Form.

Field / Button	Description
<b>Meter Name</b>	Type of server monitor to add
<b>Meter Description Name</b>	Name of meter within dashboard
<b>Folder Path</b>	Path to the folder being monitored
<b>File Extension</b>	Extension of the files FaxPulse is counting
<b>File Age Interval (in minutes)</b>	How often FaxPulse checks this monitor
<b>Error Threshold</b>	Number of faxes that will indicate a system error
<b>Gauge Direction</b>	Direction used to compare the count to the chose thresholds: <ul style="list-style-type: none"> <li>• Over Threshold</li> <li>• Under Threshold</li> </ul>
<b>Email on Error</b>	Check the box to receive an email if a system error condition exists
<b>Email on Resolution</b>	Check the box to receive an email if a system error condition no longer exists
<b>Alert Group</b>	Alert Group(s) to receive alerts for monitor
<b>Alert Schedule</b>	Alert Schedule for receiving alerts for monitor



## Add New Server Metric

The screenshot shows the 'Create Server Meter' form in the FaxPulse application. The form is titled 'Create Server Meter' and contains the following fields and options:

- Meter Name:** A dropdown menu with 'Image Folder Space' selected.
- Meter Description Name:** A text input field containing 'Image Folder Space'.
- Error Threshold:** An empty text input field.
- Gauge Direction:** Radio buttons for 'Over Threshold' and 'Under Threshold'.
- Email On Error:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Email On Resolution:** Radio buttons for 'Yes' and 'No'.
- Alert Group:** A dropdown menu with 'Default' selected.
- Alert Schedule:** A dropdown menu with 'Default 24/7' selected.

A blue 'Create' button is located at the bottom left of the form. The FaxPulse logo and navigation menu are visible on the left side of the interface.

Select the Add Server Metric Button **+ Server Metric** from the Server homepage to open the Create Server Meter form.

Field / Button	Description
<b>Meter Name</b>	Type of server monitor to add: <ul style="list-style-type: none"> <li>• Image Folder Space</li> <li>• CPU Usage</li> </ul>
<b>Meter Description Name</b>	Name of meter within dashboard
<b>Gauge Direction</b>	Direction used to compare the count to the chose thresholds: <ul style="list-style-type: none"> <li>• Over Threshold</li> <li>• Under Threshold</li> </ul>
<b>Email on Error</b>	Check the box to receive an email if a system error condition exists
<b>Email on Resolution</b>	Check the box to receive an email if a system error condition no longer exists
<b>Alert Group</b>	Alert Group(s) to receive alerts for monitor
<b>Alert Schedule</b>	Alert Schedule for receiving alerts for monitor



## Add RightFax Monitor

The screenshot shows the 'Create Server Meter' form in the FaxPulse interface. The form is titled 'Create Server Meter' and contains the following fields:

- RightFax Service:** A dropdown menu with 'RightFax Alert Module' selected.
- Meter Description Name:** A text input field containing 'RightFax Alert Module'.
- Email On Error:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Email On Resolution:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Alert Group:** A dropdown menu with 'Default' selected.
- Alert Schedule:** A dropdown menu with 'Default 24/7' selected.

A blue 'Create' button is located at the bottom left of the form. The FaxPulse logo and navigation menu are visible on the left side of the interface.

Select the Add RightFax Monitor Button  from the Server homepage to open the Create Server Meter form.

The RightFax Monitor tracks each Module and Service within your RightFax system.

Field / Button	Description
<b>Meter Name</b>	Type of server monitor to add
<b>Meter Description Name</b>	Name of meter within dashboard
<b>Email on Error</b>	Check the box to receive an email if a system error condition exists
<b>Email on Resolution</b>	Check the box to receive an email if a system error condition no longer exists
<b>Alert Group</b>	Alert Group(s) to receive alerts for monitor
<b>Alert Schedule</b>	Alert Schedule for receiving alerts for monitor



## Add Channel Monitor

The screenshot shows the 'Create Channel Meter' form in the FaxPulse interface. The form is titled 'Create Channel Meter' and contains the following fields and options:

- Meter Name:** A dropdown menu with 'Receiving Channels' selected.
- Meter Description Name:** A text input field containing 'Receiving Channels'.
- Error Threshold:** An empty text input field.
- Gauge Direction:** Radio buttons for 'Over Threshold' and 'Under Threshold'.
- Email On Error:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Email On Resolution:** Radio buttons for 'Yes' and 'No'.
- Alert Group:** A dropdown menu with 'Default' selected.
- Alert Schedule:** A dropdown menu with 'Default 24/7' selected.

A blue 'Create' button is located at the bottom left of the form. The FaxPulse logo and navigation menu are visible on the left side of the interface.

Select the Add Channel Monitor Button **+ Channel Monitor** from the Server homepage to open the Create Channel Meter form.

The Channel Monitor tracks the status of all of your system channels.

Field / Button	Description
<b>Meter Name</b>	Type of server monitor to add
<b>Meter Description Name</b>	Name of meter within dashboard
<b>Email on Error</b>	Check the box to receive an email if a system error condition exists
<b>Email on Resolution</b>	Check the box to receive an email if a system error condition no longer exists
<b>Alert Group</b>	Alert Group(s) to receive alerts for monitor
<b>Alert Schedule</b>	Alert Schedule for receiving alerts for monitor



## Add Alert Group

Select the Add Group Button + Group from the Alert Groups menu in the homepage to open the Edit Alert Group form.

Field / Button	Description
<b>Group Name</b>	Name for your alert group within the dashboard
<b>Email Address</b>	Email address where alerts will be sent
<b>Alert Email Subject</b>	Subject line for alert emails
<b>Alert Email Body</b>	Body text for alert emails
<b>Resolution Email Subject</b>	Subject line for resolution emails
<b>Resolution Email Body</b>	Body text for resolution emails



## Add Alert Schedule

Select the Add Schedule Button **+ Schedule** from the Alert Schedules menu in the homepage to open the Create Alert Schedules form.

Field / Button	Description
<b>Schedule Name</b>	Name for your alert schedule within the dashboard
<b>Alert Timing</b>	Designated timeframe for alerts to be sent out (muted on non-selected hours)
<b>Set Holiday Alert Schedule?</b>	Allows you to upload a CSV for a holiday schedule for muting alerts



# QlikView Management Console (QMC)

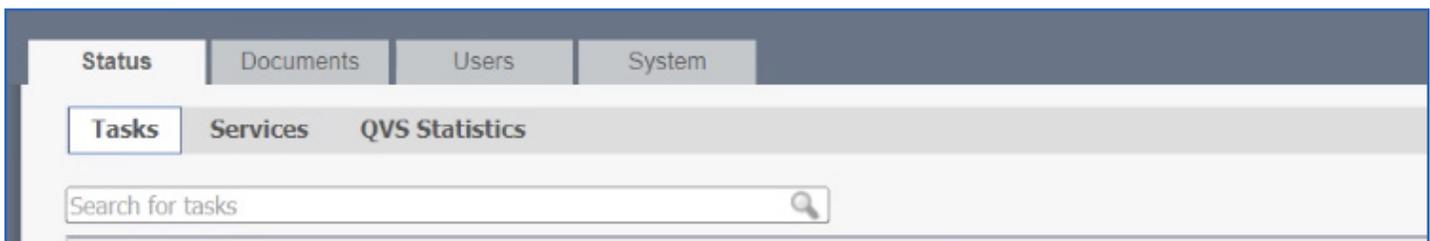
## Accessing the QlikView Management Console

- 1.) Log in to the FaxPulse Server as the FaxPulse Service Account
- 2.) Open the QMC in browser: <http://localhost:4780/qmc>

There are 4 main tabs in the QMC:

Tab	Description
Status	Current status of the QlikView system
Documents	Configure document settings
Users	Not used in FaxPulse
System	Initial configuration of the QlikView system

## Status Tab



The status tab contains information about the current status of the QlikView server. There are 3 sub tabs:

- Tasks
- Services
- QVS Statistics

## Status Tab > Tasks Sub Tab

The tasks sub tab provides information on the status of the data reloads with one row per document.

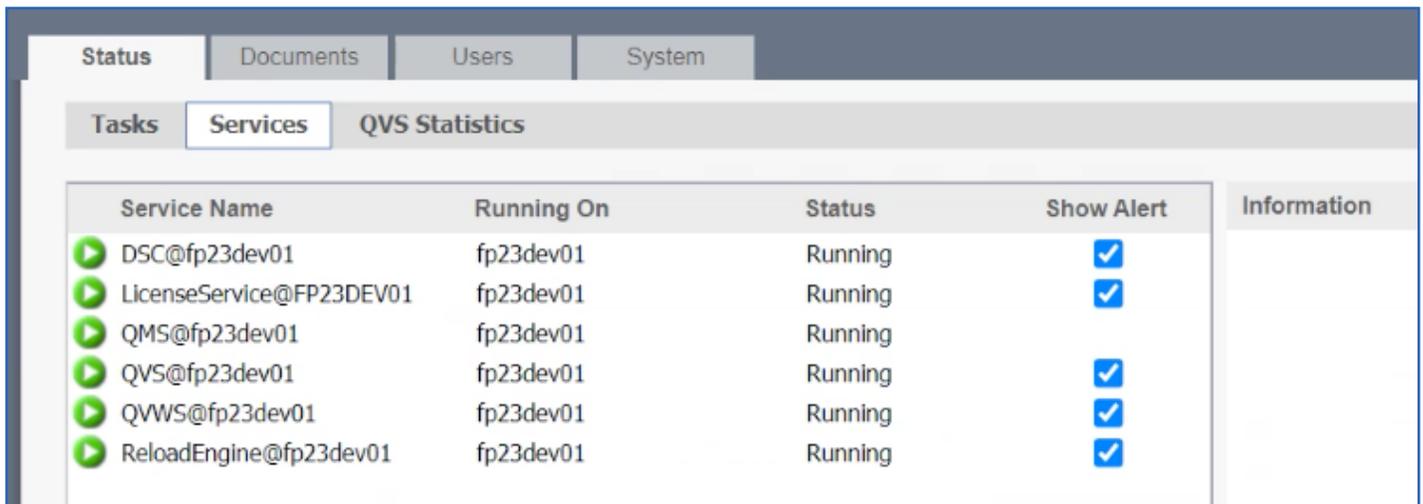


Tab	Description
<b>Name</b>	Name of the QlikView document
<b>Pencil Button</b>	Edit document properties
<b>Play Button</b>	Start an unscheduled reload
<b>Stop Button</b>	Stop a currently running reload
<b>Status</b>	Current document status
<b>Last Execution</b>	Timestamp when the task was last ran
<b>Started / Scheduled</b>	Either the timestamp when a currently running task started or the timestamp when a task is scheduled to run next

## Document Statuses

Task Status	Icon Description	Display Example
<b>Running</b>	Green Arrow	 FaxPulse MA.qwv (FaxPulse MA.qwv)
<b>Waiting</b>	Blue Check	 FaxPulse MA.qwv (FaxPulse MA.qwv)
<b>Failed</b>	Red X	 FaxPulse MA.qwv (FaxPulse MA.qwv)

## Status Tab > Services Sub Tab

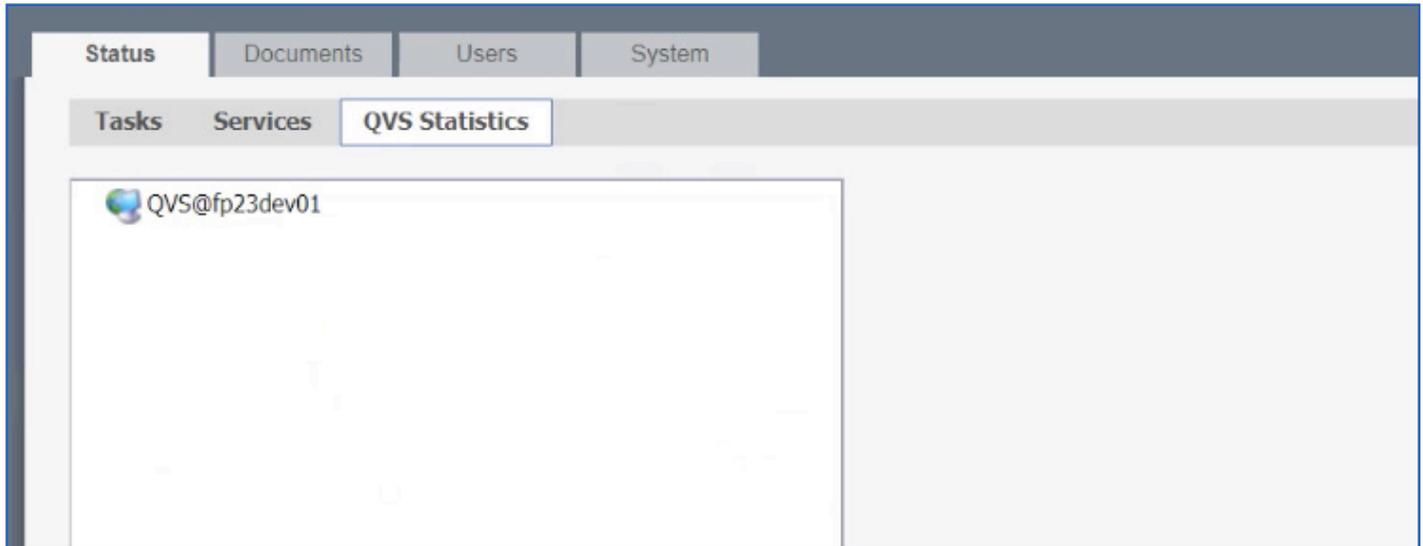


Service Name	Running On	Status	Show Alert	Information
 DSC@fp23dev01	fp23dev01	Running	<input checked="" type="checkbox"/>	
 LicenseService@FP23DEV01	fp23dev01	Running	<input checked="" type="checkbox"/>	
 QMS@fp23dev01	fp23dev01	Running	<input type="checkbox"/>	
 QVS@fp23dev01	fp23dev01	Running	<input checked="" type="checkbox"/>	
 QVWS@fp23dev01	fp23dev01	Running	<input checked="" type="checkbox"/>	
 ReloadEngine@fp23dev01	fp23dev01	Running	<input checked="" type="checkbox"/>	

Displays the current status of the QlikView Services. Selecting a service provides details in the right-hand pane.



## Status Tab > QVC Statistics Sub Tab

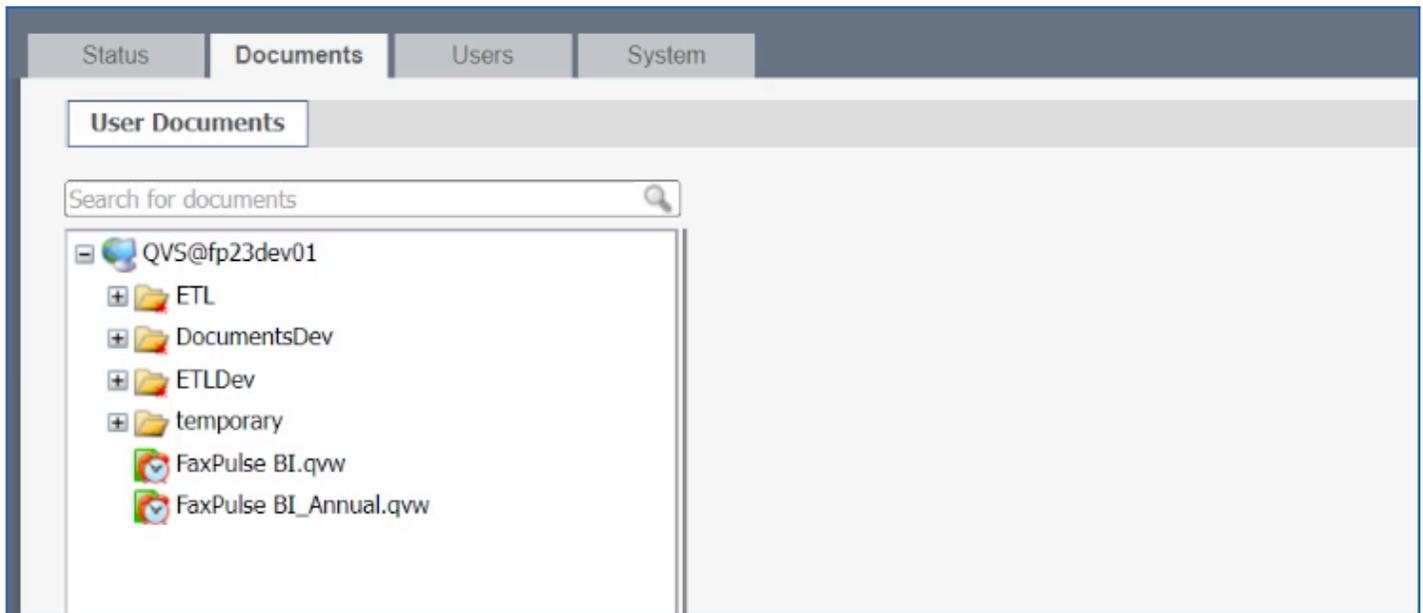


Displays current information for the QlikView server. Sub Tabs:

Tab	Description
<b>Open Documents</b>	List of documents that are currently open
<b>Active Users</b>	List of users that are currently using QlikView
<b>Performance</b>	Statistics for the QlikView server
<b>Documents and Users</b>	List of documents and users



## Documents Tab



The documents tab contains information about the current status of the QlikView server. Selecting a document will allow editing of the document properties.

There are 4 Sub Tabs:

Tab	Description
<b>Server</b>	Information on how the document is configured in the server
<b>Document Information</b>	List of users that are currently using QlikView
<b>Reload</b>	Configure reload task settings
<b>Document CALs</b>	Manage access to individual documents

### Documents Tab > Server Sub Tab

Not used in FaxPulse

### Documents Tab > Document Information Sub Tab

Not used in FaxPulse



## Documents Tab > Reload Sub Tab

The screenshot displays the 'Reload' configuration window in FaxPulse. On the left, a tree view shows the user's document structure under 'QVS@fp23dev01', with 'FaxPulse BI.qww' highlighted. The main panel is divided into 'Server', 'Document Information', and 'Reload' tabs, with 'Reload' active. The 'Reload Schedule' section includes an 'Enabled' checkbox (checked), radio buttons for 'None', 'Hourly', 'Daily', 'Weekly', 'Monthly', 'Continuously', 'On Event from Another Task' (selected), and 'On an External Event'. The 'Every' field is set to '1 hours and 0 minutes', and the 'Start' time is '4/11/2023 1:19:30 PM'. The 'Day' is set to '1' and the time is '00:00 (hh:mm)'. The 'Successful' dropdown is set to 'Successful' and the 'Dependency' dropdown is set to 'ETL/FaxPulse ETL-22.2.qww'. The 'Timeout seconds' field is set to '21600'. There are also fields for 'User name' and 'Password', and buttons for 'Abort reload', 'Apply', and 'Cancel'.

Configure reload task settings, including frequency of reload.



## Documents Tab > Document CALs Sub Tab

The screenshot shows the 'User Documents' interface with the 'Document CALs' sub-tab selected. The left sidebar shows a tree view with 'QVS@phrfaxpulse' expanded to show 'FaxPulse BL.qvw' and 'FaxPulse MA.qvw'. The main area displays the following information:

- Summary:**
  - Document CALs available on server: 12
  - Document CALs not allocated on server: 0
  - Document CALs allocated to this document: 6
  - Document CALs embedded in document: 0
  - Document CALs assigned to users: 0
- Document CALs:**
  - Number of CALs allocated to this Document: 6
  - Allow dynamic CAL assignment
- Assigned Users:** 3 items, 20 per page


Name	Last Used (UTC)	Quarantined Until (UTC) *	People Icon
andlan			👤
briker			👤
FaxMon.svc			👤

\* The CAL will be formally deleted after the quarantine time.

Buttons: Apply, Cancel

To manage users, click the green "People" icon on the right of the header of the Assigned Users data grid.



### Manage Users

Search for Users and Groups

Default Scope

Search Result

Selected Users

Search for users by username. Use the asterisk (\*) wildcard character at the end if users are not returned. Highlight the users in the search result pane and click the Add > button.

When all users have been added, click the OK button.

Remember to click the "Apply" button to save your changes.