



opentext™

OpenText RightFax CE 21.2
Managed Services

Administrator Guide

Edition

OpenText RightFax CE 21.2 Managed Services

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Chapter 1: Introduction

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

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

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

Chapter 2: Managing and configuring fax servers

The RightFax web applications include most of the functionality of Enterprise Fax Manager (EFM).

Use the Servers application to create a list of servers that you administer. Once you create the list of servers, you can open RightFax Web Admin from the list.

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

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

Creating a list of RightFax servers that you administer

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

To add a server

1. Open `http://<servername>/RightFax/Servers`, where `servername` is either the name of the RightFax server or its IP address. You can also open `http://<servername>/RightFax`, and then click **Servers** in the application switcher in the title bar. The Servers application opens.

2. If the server list is empty, the **Add RightFax Server** dialog box opens.
If the list has entries, click **Add** to add another server.
3. In the **RightFax Server Address** box, enter the server name or the IP address, and then click **Ok**.

To open Web Admin from the list of servers

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


Viewing summary information for your RightFax servers

In the Servers application, the following information appears for each server.

Server name

The name of the RightFax server, including the network protocol.

An icon showing the status of the services:

-  All services are running normally.

- ❗ One or more services are not running. Normal fax operations are not available.
- ⚠ Queue usage may be high. Normal fax operations are available.

Version

The version of the RightFax server software.

Licensed channels

Total number of channels licensed for this server.

Time running

The length of time that has elapsed since the RightFax Server service was last started. Display is in the format DDDD:HH:MM:SS.

Queue usage

The fax server's internal processes are collectively called the server's internal Event Queue. The Event Queue is represented as the ratio of fax traffic volume to server resources. The higher the traffic volume, the higher this number will be.

When the Event Queue of a RightFax server reaches 90 percent, the server will suspend certain functions. At 90 percent, all new outbound and inbound faxes will be temporarily set aside while the server processes the existing workload. After the Event Queue falls to 75 percent, the held faxes will be scheduled for processing along with all new fax traffic.

This internal workload regulation is handled by the Server module and cannot be overridden. If the fax server is consistently reaching the 90 percent capacity level, consider upgrading the fax server's system resources and/or fax channels.

Availability index

The relative availability of the server's faxboards. The higher the number, the more available the server is for sending faxes.

RightFax uses this value when an outgoing fax number has two equally weighted dialing rules that send it to two different servers.

RightFax sends the fax via the server with the highest availability index.

Character set mode

The OEM or ANSI code page being used by the server. The code page determines the language character sets that are supported for fax conversion.

Server Identifier

The SUID (System Unique ID or System ID) used to activate this server license. You must provide this identifier when you contact OpenText Customer Support.

Starting Web Admin

To log on to Web Admin

1. Open `http://<servername>/RightFax/Admin`, where `servername` is either the name of the RightFax server or its IP address. You can also open `http://<servername>/RightFax`, and then click **Web Admin**.
2. In the **User ID** box, enter an administrator user ID. If required, enter the **Password**, and then click **Sign In**. When it is first installed, the default password for the Administrator account is **password**. Web Admin opens, the list of RightFax services appears in the right pane.

To enable dark mode

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

To log off

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

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

Viewing the dashboard

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

To change which charts appear

1. In the left pane, click **Dashboard**.
2. Click **Configure**, and as needed select and clear the check boxes of the charts you want to show or hide.

About the dashboard charts

Channels

- The **Channels** panel shows the number of fax channels that are in the process of sending, the number of fax channels that are in the process of receiving, and the number of fax channels that are idle.
- Click the panel to open the list of fax channels and view the status of each one.

Work Requests

- The **Work Requests** panel shows the total number of database work requests from the WorkServer modules and email gateway modules that are being processed by the server.
- WorkServer and email gateway work requests are shown as a percentage of the total.
- Click the panel to open the list of server statistics and queues and view the status of each one.

Services

- The **Services** panel shows the condition of the fax server services.
- Click the panel to open the list of services.

CPU Usage

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

Fax by Volume

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

Queues

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

Client Connections

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

Fax Status

- The **Fax Status** panel shows the total number of faxes that are being processed for sending and the number of faxes in each sending process.
- Click the panel to open the list of server statistics and queues and view the status of each one.






Viewing fax channel information

To view fax channel information for the server

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

server.

The following table describes each column in the right pane.

| Column | Description |
|--------------|--|
| Channel | Channel status, channel number, (channel capability), DocTransport. Channel status:  Sending  Receiving  Idle or waiting  Temporarily not available  Offline Channel capability: (N) Reserved (S) Send (Dial) (R) Receive (Answer) (B) Both (Vs) (Vr) or (Vb) VM-Notify send, receive, or both (Ss) (Sr) or (Sb) Dial w/Ring Detect send, receive, or both |
| Operation | The current operational status of the channel. |
| Routing Code | The routing code for incoming faxes. |
| Phone Number | The destination phone number for outgoing faxes. |
| User ID | The user ID for the user that is sending the fax. |
| State | The channel state. |

| Column | Description |
|----------------------------------|---|
| Remote ID | The CSID of the remote fax machine that sent the fax. |
| Rate | The current rate of transmission. |
| Compression | The method of fax compression. |
| Pages in Call | The number of pages that were transmitted in the call. |
| Remaining (est.)/Elapsed Minutes | The time remaining to complete the transmission or the duration of the transmission. |
| Detail | While at rest, the type of channel (such as Brooktrout IP or RightFax Connect). While processing, the most recent channel status such as Receiving or Sending. |






About RightFax services

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

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

To start and stop services, you must be granted the user permission "Can configure Services in Web Admin." See [Permissions on page 27](#).







To open the list

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

Monitoring server statistics and queues

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

To view RightFax server statistics and queues

- Click **Statistics**. The available queues and statistics appear in the list, The following icons may appear:
 -  Value is provided for informational purposes. No warning or alert threshold values defined.
 -  Stable amount of work in the queue. No warning or alert threshold values defined.
 -  Work is below the threshold values defined for this queue.
 -  Work exceeds the threshold value defined for the warning icon and below that for the alert icon, if defined.
 -  Work exceeds the threshold value defined for the alert icon.
 -  Queue could not be queried or does not apply to this server, or value is unavailable.

Fax Server

| Statistic or Queue | Description |
|----------------------------------|---|
| Total server events | Total number of events currently scheduled on a Server module. |
| Documents in queue on FaxServ(s) | Total number of document-related events currently scheduled on a Server module. |
| Total documents | All documents in the system. |

| | |
|---|---|
| Deleted documents | All documents flagged in the database as deleted. Associated value fluctuates based on the days to keep deleted fax records setting of each user group. |
| Transmission check events | Number of "Scheduled to be sent" and "Sending" documents that are pending Server module action. |
| System messages in the database | Messages from a Database module to a Server module that have deferred fax processing. |
| Quick kicks from Database module to Server module | Messages kicked by a Database module and passed to a Server module. |
| Gateway route requests | Number of requests from a Server module to gateways to pick up documents. |
| Fax Server Event Queue Usage | The percentage of the fax server's internal Event Queue currently in use. |
| All Faxes Scheduled | Number of documents on DocTransport scheduled to be sent. |
| All Transmission Statuses | Number of documents sent by DocTransport, but not yet processed by a Server module. |
| Deleted faxes queue depth | Number of items in the deleted faxes queue. |
| Notification queue depth | Number of items in the notifications queue. |
| Fax Server Events Processed on <i>servername</i> | The number of server events processed by the server. This statistic appears for each server in a Shared Services system. |

Conversion

| Statistic | Description |
|-----------|-------------|
|-----------|-------------|

| | |
|-------------------------------------|--|
| Conversion events | Number of events in the queue that are preparing an outbound fax to be scheduled for transmission. |
| PCL5 conversion requests | Number of requests to convert PCL documents. |
| Postscript conversion requests | Number of requests to convert Postscript documents. |
| General purpose conversion requests | Number of requests to convert documents from any format, including compound requests for multiple types of conversion. |
| Coversheet creation requests | Number of requests to create cover sheets. |

DocTransport

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

| | |
|--------------------------------|---|
| All-Time Pages Received | The total number of fax pages received on this server since the All-Time Counter Starting Date . |
| All-Time Counter Starting Date | The starting date from which the “All-Time” statistics are calculated. |

Fax Status

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

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

Monitoring client connections

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

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

To open the list of client connections

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

To refresh the view

- Click .

To remove client connections that appear to be invalid

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

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

To view error logs for web client connections

1. Click **Client Connections**, and the **Client Connections** page appears.
2. Click **View Logs**. If no connection is selected, then the logs for all web client connections appear. If a connection is selected, the log for the selected connection appears.

Selecting a service account

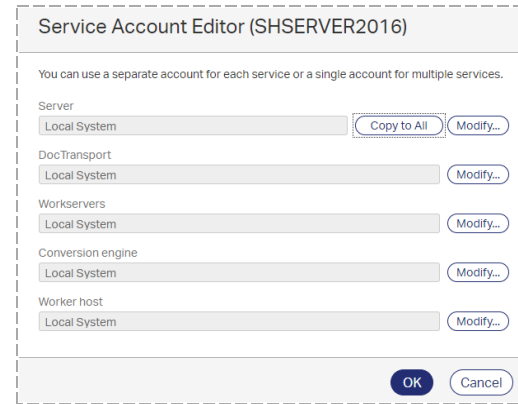
RightFax services log on to the network using a Windows user account that you specify. The user account for a service must have access to all the network resources that the tasks managed by that service require. This account is initially selected during the RightFax installation.

To change service accounts, you can set the account for the Server service and then copy these settings to the other services.

To view service account settings

- Click **Select Service Account** or **Service Account**. The **Service Account Editor** window opens, showing the currently defined account for each service. The default is to use one of the

predefined accounts.



To change service accounts

1. In the **Service Account Editor** dialog box, next to the account you want to change, click **Modify**. To define account settings once and then copy them to all other services, first modify the Server service account.
2. In the **Modify Service Account** dialog box, do one of the following:
 - Click **Local System**, **Local Service**, or **Network Service**.
 - Click **Specified account**, and enter the service account name in the format *domain\username* or *machine\username*. If needed, enter the password, and then click **OK**.
3. To copy the Server service account information to the other services, click **Copy to all**.
4. Click **OK**.

Configuring the domain account for Microsoft Kerberos

The Microsoft Kerberos security package adds greater security than Windows NT LAN Manager (NTLM) to systems on a network. Service principal names (SPNs) are used by Kerberos authentication to associate a service instance with a service logon account.

If NTLM is disabled on the network and if the RightFax service account is not a Domain Administrator, then you must edit the service principal name to associate the service with a service logon account.

To edit the service principal name

1. Run ADSIEdit.exe and connect to the domain.
2. Under **CN=Users**, right-click the service account user. On the shortcut menu, click **Properties**. The user properties dialog box opens.
3. On the **Attribute Editor** tab, edit the **servicePrincipalName**. Enter the name **remote/rfserver**, where *rfserver* is the name of the RightFax server.

Configuring the session timeout for FaxUtil Web

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

To configure the session timeout

1. In the left pane, click **System**, and then in the right pane click **General**.
2. Click **Settings**, and the **Settings** dialog box opens. Under **FaxUtil Web inactivity timeout**, enter the number of minutes of inactivity, and then click **OK**.

Chapter 3: Viewing RightFax Analytics

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

Before you begin

- RightFax Analytics must be licensed and activated on the server, and the database must be installed and connected. See the *RightFax Administrator Guide*.
- Your user account permissions determine if you can view RightFax Analytics. See [Editing a user profile on page 25](#).

To sign in

1. Open `http://<servername>/RightFax/analytics`, where `servername` is either the name of the RightFax server or its IP address.
2. In the **User ID** box, enter your RightFax user ID. If required, enter the **Password**, and then click **Sign In**.

To return to the main Analytics page after viewing detailed data

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

To sign out

- On the `<username>` menu, click **Sign Out**.
- The system will sign you out after 15 minutes of inactivity.

About the charts

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

Faxes

- The number of faxes that were successfully sent compared to the number of faxes that were successfully received during the specified time period.
- The total number of faxes that were sent and received appears in the center of the chart.

Pages

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

Send Success Rate

- The number of faxes that were successfully sent compared to the number of faxes that were not successfully sent during the specified time period.
- The percentage of faxes that were successfully sent compared to faxes that were not successfully sent appears in the center of the chart.

Channel Usage

- The number of channels that were in use during peak usage of the specified time period. This includes all inbound and outbound calls regardless of the fax statuses during the specified time period.
- The number of channels at peak usage as a percentage of total channels appears the center of the chart.
- Click **Calculate** to view the chart.


Viewing and downloading Analytics data

To view the data behind a chart or graph

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

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

To print or download a chart

1. Find the chart you want to download.
2. Click  to open the **Export or Print** menu, and do one of the following:

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

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

To download a .csv file of the records

1. Click the chart and the data behind the chart until the list of records appears.
2. Click **Download**.
3. In the **Download** dialog box, click **Download** again.
4. Use the save function in the browser to save the file.

Customizing the charts

To specify a RightFax user group to analyze

1. On the **Analytics** page, click **Configure**.
2. Under **Group**, enter or search for the group ID. The charts will update with the data for the group.

To set channel usage thresholds

1. On the **Analytics** page, click **Configure**.
2. Under **Channel Usage Thresholds**, enter the number for the percentage at which the channel usage levels should change from green to yellow and from yellow to red.
3. Click **Ok**.

To change the time period for the data in the charts

1. On the **Analytics** page, click **Configure**.
2. Under **Configure Timeframes**, do one of the following:
 - To display data for the past 30 days including today, click **Month**.
 - To display data for the past 365 days including today, click **Year**.
3. Click **Ok**.

Chapter 4: Configuring document conversion

The RightFax server uses the RightFax Conversion Engine to generate fax images from the original file format.

When a document is printed directly from a native application to the RightFax print-to-fax driver, the conversion is handled by the native application on the client computer.

Configuring the RightFax Conversion Engine service

The RightFax Conversion Engine service detects when a document is passed to the RightFax server and converts the file.

Opening the RightFax Conversion Engine configuration

Note The RightFax Conversion Engine configuration program cannot be opened from a remote computer.

To open the RightFax Conversion Engine configuration window

1. In Web Admin, in the left pane, click **System**.
2. In the right pane, click **Configuration**, and then click **RightFax Conversion Engine**.

Configuring OCR conversions

You can adjust settings to optimize OCR conversion.

To configure optical character recognition

1. Open the RightFax Conversion Engine Configuration window. See [Opening the RightFax Conversion Engine configuration above](#).
2. On the **OCR** tab, complete the following fields, and then click **OK**:
 - **Maximum Conversion Time (factor)**. Adjust this setting based on the size of the largest document (page and word count) sent for this conversion. The default value of 1 minute is usually adequate for all but the largest documents. Local testing ultimately determines the optimal setting for your environment.
 - **Maximum number of retries**. The maximum number of conversion attempts per document is controlled by this setting. Documents that fail conversion are marked as Problem Converting Fax Body or Coversheet.
 - **Country**. Select an option from the list. This list contains all supported languages, as well as some country and region codes that incorporate multiple languages with similar character sets (such as Western Europe).

Configuring HTML conversions

RightFax uses a dedicated HTML conversion engine to fax HTML files.

To configure HTM and HTML conversions

1. Open the Conversion Engine Configuration window. See [Opening the RightFax Conversion Engine configuration on the previous page](#).
2. On the **Html** tab, complete the following fields. Local testing will ultimately determine the optimal settings for your environment.

Application Monitoring

Use this setting to allocate memory (in megabytes) as needed. The default value of 70 MB is usually adequate for all but the largest documents.

Document Monitoring

- **Maximum conversion time (factor)**

Move the slider to the right to use a multiplication factor that increases the estimated conversion time. This is useful to troubleshoot documents that appear to have stopped responding, but may just require more time.

The Conversion Engine estimates the conversion time based on the size of the document. You can increase this time by specifying a multiplication factor on a scale between 1.0 (less) and 2.0 (more).

- **Maximum number of retries**

Specify the maximum number of conversion attempts per document. Documents that fail conversion are marked as Problem Converting Fax Body or Coversheet.

Page Headers and Footers

If your conversions require header and footer print codes, you must add them to the Header and Footer fields.

Page Margins

Use the up and down arrows to configure page margins. Number format varies with regional settings. If the format

includes a period as a decimal separator, the values are in inches (.75 inches). If the format includes a comma as a decimal separator, the values are in millimeters (19,0 millimeters).

Configuring Microsoft Office conversions

You can adjust settings to optimize the conversion of Microsoft Office files.

To configure Microsoft Office conversion

1. Open the Conversion Engine Configuration window. See [Opening the RightFax Conversion Engine configuration on the previous page](#).
2. On the **Office** tab, configure the following fields. Local testing will ultimately determine the optimal settings for your environment.

- **Application Monitoring.** Use this setting to allocate memory (in megabytes) as needed.

- **Document Monitoring.**

- **Maximum conversion time (factor)**

Move the slider to the right to use a multiplication factor that increases the estimated conversion time. This is useful to troubleshoot documents that appear to have stopped responding but may just require more time.

The Conversion Engine estimates the conversion time based on the size of the document. You can increase this time by specifying a multiplication factor on a scale between 1.0 (less) and 2.0 (more).

- **Maximum number of retries**

Controls the maximum number of conversion attempts per document. Documents that fail conversion are

marked as Problem Converting Fax Body or Coversheet.

3. Click **OK**.

Configuring XPS conversions

RightFax uses a dedicated XPS conversion engine to convert Microsoft XPS files.

To configure XPS conversions

1. Open the Conversion Engine Configuration window. See [Opening the RightFax Conversion Engine configuration on page 19](#).
2. On the **XPS** tab, configure the following fields. Local testing will ultimately determine the optimal settings for your environment.
 - **Application Monitoring.** Use this setting to allocate memory (in megabytes) as needed. The default value of 70 MB is usually adequate for all but the largest documents.
 - **Document Monitoring.**
 - **Maximum conversion time (factor)**

Move the slider to the right to use a multiplication factor that increases the estimated conversion time. This is useful to troubleshoot documents that appear to have stopped responding but may just require more time.

The Conversion Engine estimates the conversion time based on the size of the document. You can increase this time by specifying a multiplication factor on a scale between 1.0 (less) and 2.0 (more).
 - **Maximum number of retries**

Controls the maximum number of conversion attempts per document. Documents that fail conversion are

marked as Problem Converting Fax Body or Coversheet.

3. Click **OK**.

Configuring event logging

By default, all output is written to the Windows Event Logs. When the service is running in debug mode, errors and warnings are written to the Windows Event Logs based on event log settings, while the diagnostics window shows all messages in real time.

For more information about debug mode, see [Troubleshooting the Conversion Engine on page 1](#).

To configure event logging

1. Open the Conversion Engine Configuration window. See [Opening the RightFax Conversion Engine configuration on page 19](#).
2. Click the **General** tab.
3. In the **Log level** list, click the level of logging for the type of log.
 - **Critical** records events of critical importance. Typically this includes unexpected events such as a service interruption.
 - **Normal** records events of normal importance, such as scheduling a document.
 - **Verbose** records more details of events of normal importance.

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.
 - **Diagnostic** records events that are useful for tracking and resolving problems.

Improving the conversion quality

The quality of fax conversions depends on many factors. You can test different options for improving the quality by using the Hold for Preview option in FaxUtil or FaxUtil Web and then deleting the fax.

Before documents are down-scaled to the selected fax resolution, they can be converted with a bias toward improved text legibility, toward improved graphical fidelity, or a bias toward both. The conversion bias you select here will be the server default. A user sending a fax can select to use this default, another conversion bias, or no optimization.

You can also select a postscript driver for the automation printer. Before doing so, verify that the application is not running. As needed, end the task in Task Manager.

To set a default conversion bias

1. Open the Conversion Engine Configuration window. See [Opening the RightFax Conversion Engine configuration on page 19](#).
2. On the **General** tab, specify the default quality of the conversion:
 - To not optimize the conversion, select **None**.
 - To optimize for graphical fidelity, select **Optimize for Images**.
 - To optimize for legibility of text, select **Optimize for Text**.
 - To optimize for both text and images, select **High Contrast**.
3. You may be able to improve PostScript conversions by selecting the **Show all text as black** check box.

Chapter 5: Creating RightFax user accounts

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

To open the list of users

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

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

| ID | Name | Route Code | Group | Faxes | Route Type | Route Format |
|--------------|--------------|------------|---------------|-------------|-------------|--------------|
| ACTIVEUSER0 | ACTIVEUSER0 | 9001 | ACTIVEUSER_G0 | Fax Mailbox | TIFF(G3-1D) | |
| ACTIVEUSER1 | ACTIVEUSER1 | 9002 | ACTIVEUSER_G0 | Fax Mailbox | TIFF(G3-1D) | |
| ACTIVEUSER10 | ACTIVEUSER10 | 9011 | ACTIVEUSER_G0 | Fax Mailbox | TIFF(G3-1D) | |

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

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

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

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

About the DEFAULT user

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

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

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

Creating, deleting, copying, and editing users

To create a new user

1. Open the list of users.
2. Click **New**. The **New User** page opens.

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

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

To edit the properties of an existing user

1. Select the user in the list.
2. Click **Edit**. The **Edit User** page opens. For more information, see [Editing a user profile on the next page](#).

To delete a user account

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

Disabling a user account

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

- The user's outbound faxes will be blocked from sending.
- The user will not be able to send faxes from their fax mailbox (FaxUtil or FaxUtil Web), through the RightFax Fax control module (QuickFax, Send To, or from a native application), or from the RightFax Outlook Add-In.
- A user with administrative permissions will not be able to sign in to the administrator client (EFM or Web Admin).
- The user account will be excluded from Smart Fax distributions within groups they are part of.

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

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

- The user's received faxes will continue to be placed into their mailbox, including faxes routed or forwarded to them using their RightFax user account.
- The user will continue to receive any faxes routed to their email address, fax notifications of certified delivery, and any other email notifications.
- Other users with delegate access to the user's account can still act on the disabled user account's behalf.

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

To disable a user account

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

To enable a disabled user account

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

Editing a user profile

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

Identification

The screenshot shows the 'Edit User' window with the 'Identification' section expanded. At the top left is a profile icon with 'De' and a 'Delete' button. Below it is the 'User ID' field containing 'DEFAULT'. The 'Authentication' section has three radio buttons: 'OpenID Connect' (unselected), 'RightFax' (selected), and 'Windows' (unselected). A 'Change password...' button is next to the 'RightFax' option. Below are text input fields for 'Username' (containing 'Default for new user'), 'Distinguished name', 'Group ID' (a dropdown menu showing 'EVERYONE'), 'Voice mail subscriber ID' (containing '100'), 'Email address', and 'SMS/Mobile address'.

User ID

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

Authentication

You have the following options for user authentication.

To use OpenID Connect authentication

OpenID Connect authentication must be configured for users in Enterprise Fax Manager.

To use RightFax basic authentication

1. Click **RightFax**.
2. To set a password for the user, click **Set Password**. The **Change Password** dialog box opens.

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

- Consists of 8 - 40 characters.
- Includes both upper- and lowercase characters.
- Includes at least one number or one of the following special character: ` - = [] \ ; ' , / ~ ! @ # \$ % ^ & * _ + { } | : " < > ?

If you do not enter a password, the user will not be required to enter a password when accessing RightFax client applications.

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

To use both basic and OpenID Connect authentication in RightFax web applications

If you have configured OpenID Connect authentication for RightFax web applications, you have the option to also enable basic authentication for RightFax web applications.

1. On the RightFax server, navigate to **Program Files (x86)\RightFax\WebApps\WebAPI\API** (or the location where RightFax is installed). Open the file **Web.config** in a text editor. Under **<appSettings>**, add the the entry **<add key="signin:AlwaysShowCredentialsFirst" value="true"/>**.
2. Save the Web.config file.
3. Restart IIS.

To use Integrated Windows Authentication

1. Click **Windows** to link this RightFax user to a Windows user account and use Windows authentication to access the account. A RightFax password will not be used.
2. Click **Select Account** and select the user's Windows user account. You can also select from a list of all user accounts in each domain.

Username

Enter a descriptive name to identify the user.

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

Distinguished name

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

Group ID

Select the name of a group. Every user must be assigned to a RightFax group. For information on creating groups, see [Creating, deleting, copying, and editing groups of users on page 46](#).

Voice mail subscriber ID

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

Email address

Enter the user's email address.

- The user will be able to send documents to email as well as fax addresses.
- If configured, notifications about the user's sent and received faxes will be sent to this address.

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

SMS/Mobile Address

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

Permissions

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

| Setting | Description |
|--------------------------------------|---|
| Permissions | |
| Can Change Cover Sheets | If selected, the user can change cover sheets and is not restricted to use the cover sheet specified under Default Outbound Settings (Default Outbound Settings on page 30). |
| Can Edit/Add Forms | If selected, the user can add new overlay forms to the RightFax system using the client applications. |
| Can Edit/Add Library Docs | If selected, the user can add new library documents to the RightFax system using the client applications. |
| Can Edit/Add Workflows | If selected, the user can create, edit, and delete workflows in Enterprise Fax Manager and Web Admin. |
| Can OCR Faxes | If selected, the user can OCR faxes, either manually or automatically, as defined in FaxUtil. This attribute is not required for OCR routing. All OCR functionsRightFax OCR Converter module. |
| Can Run Reports | If selected, the user can run RightFax reports. |
| Can Send SMS Messages | If selected, the user can send documents to SMS addresses from within the RightFax client applications. |
| Can Use High Priority | If selected, the user can send faxes using “high” priority. If not selected, the user can use only “normal” and “low” priorities. |
| Can View Prior Versions of Fax Pages | If selected, the user can view previously saved versions of fax pages. |
| Can View Analytics | If selected, the user can view RightFax Analytics. |
| Restrictions | |

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

| Setting | Description |
|--|---|
| Disallow Outbound Email | If selected, when the user sends a fax addressed to an email address, the fax server fails the fax. |
| Disallow Server Printing | If selected, the user cannot print to network printers configured on the fax server for automated network print functions. |
| View Only First Page of Received Faxes | If selected, the user can view or print only the first page of a received fax. This is useful when manual routing is employed. The restriction applies to the mailbox regardless of the permissions of the user viewing the mailbox. Faxes must be routed out of the restricted mailbox before subsequent pages can be viewed or printed. |
| Requirements | |
| Must Have Faxes Approved | If selected, every fax sent by the user must be approved by a full administrator, or a group or alternate group monitor. |
| Must Have Password | If selected, the user must have a password. This does not restrict the ability to change the password. |
| Must Select Recipients from Phonebook | <p>If selected, the user can only enter recipients by selecting them from a phone book when sending a fax from a Windows-based client.</p> <p>Use this permission in conjunction with Disallow Creating and Editing of Phonebooks to ensure that the user cannot add entries to the phonebook.</p> |

| Setting | Description |
|--|---|
| Add Sent Faxes to External Processing Repository | <p>If selected, the user's outbound faxes are archived by a WorkServer. To configure WorkServer archiving, see the <i>RightFax Administrator Guide</i>.</p> <p>Note This check box applies only to WorkServer archiving of outbound faxes. WorkServer archiving is disabled when the optional XML Generator or Vault module is configured.</p> |
| Assign Default Billing Codes to Received Faxes | <p>If selected, the user's default billing code settings (see <i>Other on page 41</i>) are applied to all received faxes. This is most useful if RightFax is set up to require billing codes on received faxes. See <i>Customizing the use of billing codes on page 73</i>.</p> |
| Stamp Pages of Received Faxes with Audit Stamp | <p>If selected, printing of the RTI line is enabled and one line of text will be added to the bottom of each received fax page listing total pages, date and time received, fax server used, routing code used, CSID (caller subscriber identification) of sender, and transmission duration.</p> |
| Exceptions | |
| Bypass Billing Code Verification | <p>If selected, the user can send faxes without supplying correct billing codes. This does not exclude the user from having to supply other required fields to send faxes. This attribute is only effective if billing code verification is required system-wide.</p> |
| Excluded from Group Fax Aging | <p>If selected, the user's faxes are not subject to the automatic fax aging (image deletion) attributes of the group to which the user belongs.</p> |

| Setting | Description |
|--------------------------------|---|
| Excluded from RightFax Archive | <p>If the server is licensed for RightFax Archive, then all of the faxes for all RightFax users are subject to archiving. If selected, the user's faxes will not be archived with RightFax Archive.</p> |
| Unprotected Mailbox | <p>If selected, all other RightFax users can view, manipulate and delete documents in this user's mailbox. This does not affect the security of phonebook entries belonging to the user.</p> |

Granting administrative access

You can grant a user limited or full administrative access:

- A **Read-Only Administrator** can view the settings for administrative items in EFM and Web Admin, but cannot create, edit, or delete any items or settings.
- A **User Management Administrator** can create, edit, delete, disable and enable user accounts, and—like the read-only administrator—can view the settings for other administrative items in EFM and Web Admin, but cannot create, edit, or delete any of these items or settings. The ability to create and edit users does not include the ability to copy users between servers.
- An **Administrator** can perform all administrative functions in RightFax, including creating, editing, and deleting administrative items in EFM and Web Admin and performing administrative tasks on the mailboxes of other users.

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

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

To grant a user limited administrative access

1. In the **Client Permissions and Attributes** list, select the check boxes for the appropriate user permissions.
2. Select the **Administrative Access** check box.
3. Click one of the limited administrator roles:
 - For read-only access to EFM and Web Admin, click **Read-Only Administrator**.
 - For user management access to EFM and Web Admin, click **User Management Administrator**.

To grant a user full administrative access

1. In the **User Permissions and Attributes** list, select the check boxes for the appropriate user permissions.
2. Select the **Administrative Access** check box.
3. Click **Administrator**.
4. Select the **Can Bypass Privacy Restrictions** check box if the administrator should have access to faxes in other users' mailboxes and be able to manage user delegates in EFM and Web Admin.

Default Outbound Settings

The screenshot shows a dialog box titled "Default Outbound Settings". It contains the following elements:

- Priority:** A dropdown menu currently showing "Normal".
- Automatic delete:** A dropdown menu currently showing "Never".
- Use smart resume
- Automatic OCR

Priority

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

Automatic delete

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

Specify whether to automatically delete faxes:

- **Never.** Sent faxes are never automatically deleted. The user can review and forward sent faxes and notifications of sent faxes are sent. Select this option for most users.
- **Only If Successfully Sent.** Select this option if the account will be used to send large broadcast faxes.
- **All Faxes (successful & unsuccessful).** Select this option to prevent large numbers of faxes from accumulating in the user's fax inbox and to save disk space. Fax image files, not original documents created in other applications, are deleted.

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

- If the permission **Add Sent Faxes to External Processing Repository** is enabled for the user.
- If autoprinting of sent faxes is enabled for the user in FaxUtil.

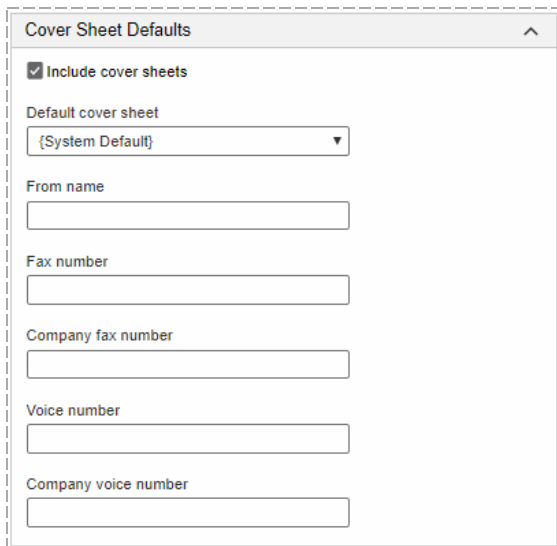
Use smart resume

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

Automatic OCR

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

Cover Sheets Defaults



Cover Sheet Defaults

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

defaults.

Default cover sheet

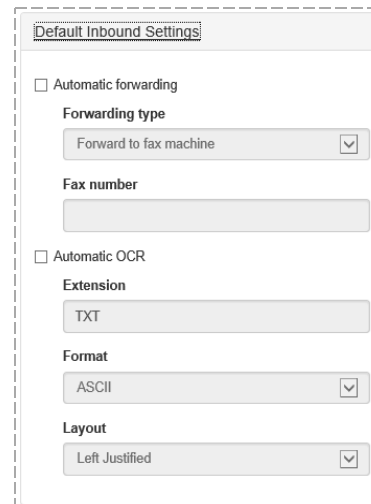
Select the default fax cover sheet file to use for this user. The list shows the fax cover sheet files added in EFM or Web Admin. Select **System Default** to use the fax cover sheet specified for the user's group or, if no group cover sheet is assigned, the cover sheet set as the system default in Cover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

Default sender information

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

Default Inbound Settings

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



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

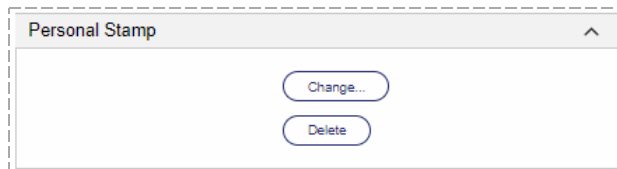
1. Select the **Automatic forwarding** check box.
2. In the **Forwarding type** list, select whether to forward to a fax machine or network users:
 - To forward to a fax machine, select **Forward to fax machine** and in the **Fax number** box, enter the fax number.
 - To forward to one or more RightFax user IDs, select **Forward to RightFax user(s)** and in the **User IDs** box, enter the user IDs. Separate multiple user IDs by comma.

To convert all received faxes to text using OCR

1. Select the **Automatic OCR** check box.
2. In the **Extension** box, enter a three-letter file extension for the output file.
3. In the **Format** list, click the text format used to interpret your fax pages:
 - **ASCII** produces a plain text file.
 - **RTF** (rich text format) preserves fonts and formatting but is only available for Windows clients.
4. In the **Layout** box, **Left Justified** means that left justified text starts from the left margin of the fax.

Personal Stamp

Stamps can be created by and for users (known as personal stamps). Each user can have one personal stamp. Personal stamps are not included in the library of stamp images.



To create, edit, or replace a personal stamp file

1. Using a graphics program, create a .gif, .tiff, .jpg, .png, or .bmp image. The maximum file size is 1 MB.
2. In Web Admin, open the list of users, select the user in the list, and then click **Edit**. The **Edit User** page opens.
3. Under **Personal Stamp**, click **Change**. The **Edit Personal Stamp** dialog box opens.
4. In the **Description** box, enter or change the description of the stamp.
5. Click **File**, and browse to the location of the image file. Select the file, and then click **Open**.
6. In the **Edit Personal Stamp** dialog box, click **OK**.

If you entered an existing description, confirm that you want to overwrite the existing stamp file.

Routing

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

Routing code (DID/DNIS)

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

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

- To assign the next fax number available, click **Assign First Available Number**. A message informs you if all numbers have been assigned. To view the list of fax numbers and their assignees, click **Look Up Fax Number**.
- To select a fax number from the list of fax numbers available to the user’s group, click **Look up fax number**, click a number not associated with a user ID, and then click **OK**.
- To disassociate the current number from this user, delete the number from the **Routing Code** box.

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

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

Routing type

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

File format

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

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

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

Routing info

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

Routing Filename Format

If faxes will be routed to a network directory, you have the option to define the format of the file name. For information on the options for

naming files, see the *RightFax Administrator Guide*.

Received fax routing form

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

Include Web Delivery URL

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

Delete after routing

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

Turning off the warning about duplicate routing codes

When users or user groups are created in RightFax, a warning message appears when a user is created with a fax number or routing code that is already assigned to another user. This warning can be disabled.

- In the upper-right corner, on the <username> menu, clear the check box **Warn about duplicate fax numbers/routing codes**.

Automatic Printing

You can enable automatic printing if you have defined at least one RightFax printer. See *Creating, deleting, and copying a printer on page 63*.

To automatically print the user's outbound faxes

1. Select the **Automatically print outbound faxes** check box.
2. Under **When to Print**, select whether to print only successfully sent faxes, only faxes that cannot be successfully delivered, or both.
3. Under **What to Print**, select the check boxes next to the items that should print: the fax **History**, **Cover sheet**, and **Body**.

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

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

To automatically print the user's inbound faxes

1. Select the **Automatically print inbound faxes** check box.
2. To only print successfully received faxes, select the **Successful receives only** check box.
3. In the **Printer** box, select a printer.

Messaging

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

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

General Messages

Messaging service

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

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

Fax received

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

Fax received from specific CSID/ANI

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

CSID/ANI to match

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

Outbound fax has been abandoned

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

Workflow Messages

Select the messaging services that will send reminders and warnings to this user that a workflow for a fax is due to be completed. For more information, see [Setting up workflows on page 147](#).

Reminder Messaging Service

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

Warning Messaging Service

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

Administrative Alerts

You can define SMS or email alerts for RightFax administrators about specific RightFax events. The text of these status messages can be

customized. See the *RightFax Administrator Guide*.

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

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

The screenshot shows a window titled "Administrative Alerts". At the top, there is a "Messaging service" dropdown menu. Below it is a list of checkboxes for various system events: "Low disk space (<150MB)", "Critically low disk space (<50MB)", "Event queue full (>90%)", "DocTransport service down", "All DocTransport services down", "Probable line failure", "Probable T1 failure", "Server improperly shut down", and "Periodic server heartbeat". Below the list is an "Interval in minutes" input field with the value "60". At the bottom, there are checkboxes for "Received fax failures" and "Received with too few DID digits", and an "Expected number of digits" input field with the value "0".

Messaging service

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

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

Low disk space (<150MB)

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

Critically low disk space (<50MB)

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

Event queue full (>90%)

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

DocTransport service down

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

All DocTransport services down

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

Probable line failure

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

Probable T1 failure

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

Server improperly shut down

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

Periodic server heartbeat

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

Received fax failures

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

Received with too few DID digits

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

About alert frequencies

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

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

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

Messaging

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

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

General Messages

Messaging service

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

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

Fax received

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

Fax received from specific CSID/ANI

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

CSID/ANI to match

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

Outbound fax has been abandoned

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

Workflow Messages

Select the messaging services that will send reminders and warnings to this user that a workflow for a fax is due to be completed. For more information, see [Setting up workflows on page 147](#).

Reminder Messaging Service

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

Warning Messaging Service

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

Notification

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

To customize the text of the notification messages, see [Configuring custom messages on page 67](#).

Method

Select a notification method for the user:

- **Use Group's Method.** Use the notification method defined for the group to which the user belongs.
- **Messaging.** Send the notification via a messaging service. To add a messaging service, see [Adding messaging services for notification messages on page 87](#).
- **Email Systems.** Send the notification to the user's email box.

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

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

Notification address

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

Reroute to another user

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

Sent

1. Select the check boxes next to the events about which to notify this user.
2. In the **During transmission** list, select when this user should be notified about sent faxes in transmission: **Never**, **Once Only**, or **Periodically**.
3. In the **Incomplete faxes** list, select when this user should be notified about incomplete faxes: **Never**, **Once Only**, or **Periodically**.
4. To include the fax with email notifications, select the **Include fax with email notifications** check box, and in the lists below, select the format (**TIF** or **PDF**) and whether to include only the **First Page** of the fax or **All Pages**.

Received

1. Select when this user should be notified about received faxes: **Never**, **Once Only - When initially received**, or **Periodically - While fax has not been viewed or printed**.
2. To include the fax with email notifications, select the **Include fax with email notifications** check box, and in the lists below, select the format (**TIF** or **PDF**) and whether to include only the **First Page** of the fax or **All Pages**.

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

Post Fax Processing

Faxes to process

When using the XML Generator module , Vault module, or Connector for IBM FileNet you can specify which of this user's faxes will be processed by the module. Select **Sent**, **Received**, **Routed**, **Forwarded**, or **Deleted**. See *RightFax XML Generator Administrator Guide*, *RightFax Vault Administrator Guide*, or *RightFax Connector for IBM FileNet Administrator Guide*.

Enabling external processors

When using the XML Generator module or the Vault module, you can specify the module that will process this user's faxes. For each module you can modify the default configuration per user. See the *RightFax*

XML Generator Administrator Guide or the *RightFax Vault Administrator Guide*.

Other

Update fax list automatically

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

Update interval in seconds

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

Default Billing Codes

In the respective boxes, specify the Billing Code #1 and Billing Code #2 that will appear in the **New Fax** dialog box each time the user sends a fax.

Default printer

Specify a default printer.

Description

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

Compute Disk Usage

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

Managing user profile pictures

Users with permission can upload a profile picture so that it appears in the header of RightFax applications. User group permissions determine if users can upload a profile picture. The picture shows which user is logged in. When a profile picture has not been uploaded, then the default image is the first two letters of the user name. Administrator user names appear with a red background, and non-administrator user names appear with a blue background.

To give permission to upload profile pictures

- You can allow groups of users to upload profile pictures. See [Editing group properties on page 47](#).

To remove a user's profile picture

- Select the user in the list, and then click **Edit**.
- Under **Identification**, next to the profile picture click **Delete**.

Managing user delegates

As an administrator you can manage delegates—users with access to a user's fax mailbox—for a user independent of whether the user has

permission to modify delegates. You can assign delegate permissions from system-defined roles or by defining custom roles. For more information about delegate permissions and roles, see [Default delegate permissions by role on the next page](#).

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

Adding and removing delegates

To add delegates for a user

1. Select one or more users in the list.
2. On the **Delegates** menu, click **Manage Delegates**. The **Delegates** dialog box opens with the list of the user's delegates.
3. Click **New**, and the **Add Delegates** dialog box opens.

4. In the **User or group** box, select one or more user or group IDs.
5. In the **Role** list, select the role for the delegate.
6. In the lists of permissions, as needed, select and clear access options.
7. To save the selections as a custom role, select the check box **Save these permissions as a custom role**, and enter a name in the **Custom role ID** box.
8. Click **OK**.

To remove delegates

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

Managing custom delegate roles

To create or edit a custom role

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

2. In the **Custom role ID** box, enter a name or select a role.
3. To create the role from an existing role, in the **Based on role** list, select the role.
4. In the lists of permissions, select and clear access options.
5. Click **OK**.

To save a custom role

1. With a delegate selected, select a role in the **Role** list.
2. In the lists of permissions, select and clear access options. The selection in the **Role** list changes to **Custom**.
3. In the **Custom role ID** box, enter a name, and then click **OK**.

To delete a custom delegate role

1. On the **Delegates** menu, click **Delete Custom Role**.
2. In the **Custom Role ID** list, select the role. The permissions for the role appear, but cannot be edited.
3. To confirm the deletion, click **Ok**.

Default delegate permissions by role

Read permissions

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

Write permissions

| | Owner | Editor | Reviewer |
|-------------------|-------|--------|----------|
| Can create faxes. | X | X | -- |
| Can edit faxes. | X | X | -- |

| | | | |
|--|---|---|----|
| Can update fax status. | X | X | -- |
| Can forward faxes. | X | X | -- |
| Can OCR faxes. | X | X | -- |
| Can create folders | X | X | -- |
| Can rename folders. | X | X | -- |
| Can create phone items. | X | X | -- |
| Can edit phone items. | X | X | -- |
| Can annotate faxes. | X | X | -- |
| Can move faxes. | X | X | -- |
| Can route faxes. | X | X | -- |
| Can route faxes | X | X | -- |
| Can annotate faxes with personal stamp | X | X | -- |

Delete permissions

| | Owner | Editor | Reviewer |
|-------------------------|-------|--------|----------|
| Can delete faxes. | X | -- | -- |
| Can delete folders. | X | -- | -- |
| Can delete phone items. | X | -- | -- |

Miscellaneous permissions

| | Owner | Editor | Reviewer |
|--------------------------------------|-------|--------|----------|
| Can approve faxes. | X | X | -- |
| Can modify user options. | X | -- | -- |
| Can modify delegates. | X | -- | -- |
| Can toggle refuse fax distributions. | X | X | -- |

| | | | |
|--|----|----|----|
| Requires fax approval. This permission does not apply to faxes that the user creates, including faxes that the user creates as a delegate on behalf of another user. | -- | -- | -- |
|--|----|----|----|

Using Integrated Windows Authentication

With RightFax Enterprise server you can link each RightFax user ID to a Windows user account to take advantage of your network's established Windows authentication.

When a user logs on to a web or client application that requires authentication, RightFax will attempt to use the Windows account name and password with which the user is currently logged on:

- If the RightFax user ID is linked to a domain account, the user will be logged on automatically with their RightFax ID using Windows authentication.
- If RightFax user ID is not linked to a domain account, the user must enter the RightFax user name and password. For FaxUtil Web, users can enter the user ID in the format `domain\username`.


The **NT Account** column in the list of users shows *Domain\username* if the user ID is linked to a domain account. If not, the column entry is **N/A**.

Linking RightFax user IDs to Windows accounts

RightFax Enterprise server provides several methods for linking one or more RightFax user IDs to existing Windows accounts.

To manually select a Windows account to which to link

1. Select the user in the list.
2. Click **Edit**.
3. On the **Identification** tab, click **Select account**, and the **Look Up Domain Account** dialog box opens.

4. Click **Look Up Domain Account**, and the **Look Up Domain Account** dialog box opens.
5. In the **Domain** box, enter the domain.
6. Click **Select Account**, enter part of the account name, and then click . In the list, select the check box of the account. The account appears in the **Select Account** box.
7. Click **Ok**.

To link new users to a Windows account by default

All new RightFax users are created based on the DEFAULT user ID .

1. Select the **DEFAULT** user ID in the list.
2. On the **Edit** menu, click **Edit**.
3. On the **Identification** tab, click **Windows**.

Each new RightFax user ID will link to the matching Windows account in the domain you are currently logged in to. If there is no matching Windows account name in the current domain, a link is not created.

Chapter 6: Creating groups of users

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

To open the list of user groups

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

Creating, deleting, copying, and editing groups of users

To create a new group

1. Open the list of groups.
2. Click **New**. The **New Group** page opens.

3. In the **Group ID** box, enter a unique group ID.
All remaining options are optional. For information on completing these options, see [Editing group properties on the next page](#).

To create a new group from an existing group

1. In the list of groups, select the group you wish to copy.
2. Click **New From Selected**. The **New Group** window opens.
3. In the **Group ID** box, enter a unique group ID

All remaining options are optional. For information on completing these options, see [Editing group properties on the next page](#).

To delete a group

1. Select the group or groups in the list.
2. Click **Delete**, and then confirm the deletion.

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

To edit the properties of an existing group

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

Editing group properties

To edit the properties of an existing group

1. Select the group in the list.
2. Click **Edit**. The **Edit Group** page opens.
3. As needed, click the heading of the section you want to edit.

General

The screenshot shows the 'General' tab of the 'Edit Group' page. It features the following elements:

- Group ID:** A single-line text input field.
- Monitor:** A single-line text input field.
- Alternate monitors:** Two stacked single-line text input fields.
- Maximum body pages:** A single-line text input field containing the value '999'.
- Checkboxes:** A list of optional settings, each with an unchecked checkbox:
 - Exclusive group
 - All faxes must be held for preview
 - Prompt to view all pages
 - Group members cannot edit delegates
 - Group members can set their own conversion bias defaults
 - Group members can upload a user profile picture
 - Include Web Delivery URL for inbound faxes routed to email
 - Can import phonebooks

Group ID

Enter a unique ID for the group.

Monitor

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

Alternate monitors

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

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

Maximum Body Pages

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

Exclusive group

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

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

Full administrators can view and select all users and groups.

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

Prompt to view all pages

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

All faxes must be held for preview

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

Group members can set their own conversion bias defaults

Before documents are rendered in the selected fax resolution, they can be converted with a bias toward improved text legibility, toward improved graphical fidelity, or a bias toward both. If selected, members of the group can select to override the defaults that are set in

the RightFax Conversion Engine by setting their own defaults for conversion bias in the client application.

Group members cannot edit delegates

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

Group members can upload a user profile picture

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

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

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

Can import phonebooks

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

Notification

Notification type

Select the default notification method for the group.

Email notifications

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

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

Notify group monitors about faxes that need approval

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

Cover Sheets

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

Cover sheets available to this group

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

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

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

Default cover sheet

In the **Default cover sheet** list, select the cover sheet to use as the default cover sheet. To use the default cover sheet assigned by the administrator, select **System Default**. See [Setting default cover sheets on page 82](#).

All faxes must have cover sheets

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

Library Documents

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

Library documents available to this group

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

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

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

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

Automatically attach a library document to all faxes

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

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

Fax Numbers

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

Fax numbers available to this group

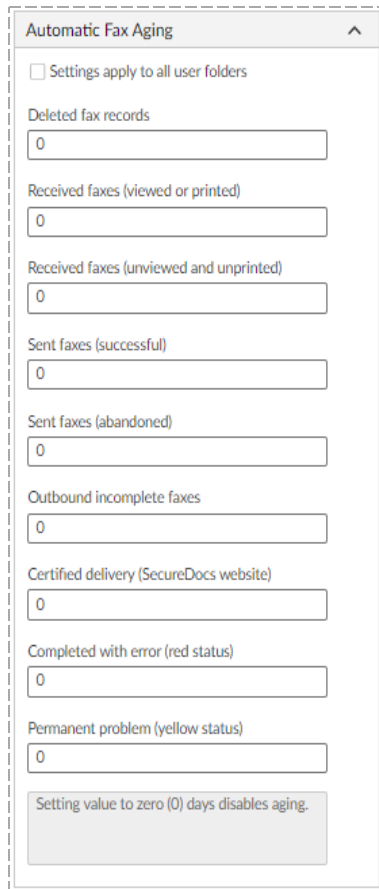
The currently available fax numbers appear in the list. Select or clear check boxes:

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

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

The Automatic Fax Aging tab

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



Automatic Fax Aging

Settings apply to all user folders

Deleted fax records
0

Received faxes (viewed or printed)
0

Received faxes (unviewed and unprinted)
0

Sent faxes (successful)
0

Sent faxes (abandoned)
0

Outbound incomplete faxes
0

Certified delivery (SecureDocs website)
0

Completed with error (red status)
0

Permanent problem (yellow status)
0

Setting value to zero (0) days disables aging.

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

To set automatic fax aging

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

folders other than Main, clear the check box.

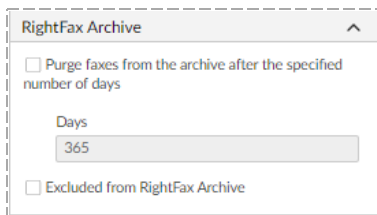
2. For each type of fax, enter the number of days the fax will remain before it is considered aged. To specify that faxes should not be aged, enter 0 (zero).

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

| Option | Description |
|--|---|
| Permanent problem (yellow status) | <p>All faxes that encountered a problem in sending that caused the faxes to be retried. The status indicator for these faxes in the RightFax client applications is yellow. (If the fax fails to send after all attempts, then the status changes to red.)</p> <p>For example:</p> <ul style="list-style-type: none"> • Sent faxes that are in the process of retrying to send. • Faxes that are held for preview. • Faxes with the status Needs Approval. • Faxes with the status Bad Paper. A fax with an overlay form that failed. • Invalid recipient fax phone number. • Invalid billing code. |

The RightFax Archive tab

If the server is licensed for RightFax Archive, then all of the faxes for all RightFax users are subject to archiving. You can exclude the faxes of a user group from the archive.



To set the schedule for purging faxes

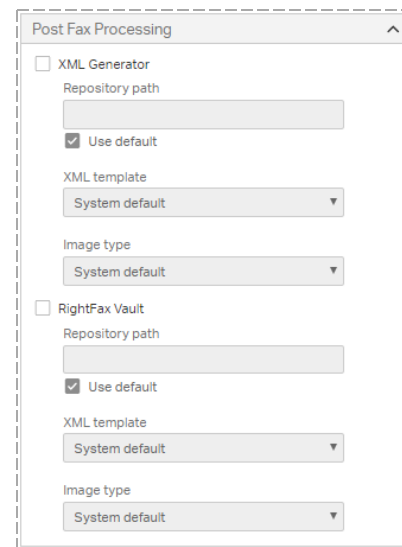
- Select the **Purge faxes that have been archived for more than** check box. In the **Days** box, enter the number of days after which faxes that have been archived with RightFax Archive will be deleted from the system. You can enter up to 999,999,999 days.

To exclude this group's faxes from RightFax Archive

- Select the **Excluded from RightFax Archive** check box.

Post Fax Processing

When using the XML Generator module or the Vault module, you can enable EDC processing so that this group's faxes can be saved with XML metadata. The XML metadata can then be used by an external archiving or document management system.



To enable this group's faxes in XML

- When using the XML Generator module or the Vault module, you can specify the module that will process this group's faxes. For each module you can modify the default configuration per group. See the *RightFax XML Generator Administrator Guide* or the *RightFax Vault Administrator Guide*.

The Restrictions tab

Forced Scheduling

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

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

Enable forced scheduling

Select to enable the forced scheduling feature.

Maximum concurrent pages

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

Maximum concurrent faxes

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

Starting time/Ending time

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

Delay until time

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

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

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

Preferred Email Gateway

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

- If group members are configured for email routing, then email gateways only will route received faxes to the group members that are assigned to the email gateway.
- If group members are configured for email notifications, then email gateways only will process email notifications for the group members that are assigned to the email gateway.
- Once a gateway has been assigned to one or more groups, that gateway only will receive faxes and email notifications for group members that are assigned to the email gateway.
- You must assign all groups to email gateways, or you can create a gateway to receive faxes and email notifications for groups that are not assigned to gateways.
- In the **Preferred Email Gateway** list, select the email gateway to receive the faxes and email notifications for the group.

Smart Fax Distribution

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

Enable Smart Fax Distribution

Select to enable smart fax distribution for the group.

Routing code (DID/DNIS)

Enter a fax number or routing code for the group.

- To use the next available fax number, click **Assign First Available Number**.
- To select from the list of fax numbers, click **Look Up Fax Number**, search for the number and select it.
- To disassociate the current number from this group, delete the number from the **Routing Code** box.

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

Allow duplicates

Select to allow duplicate routing codes.

Distribution type

Select one of the following:

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

Allow member refusal

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

Turning off the warning about duplicate routing codes

When users or user groups are created in RightFax, a warning message appears when a user is created with a fax number or routing code that is already assigned to another user. This warning can be disabled.

- In the upper-right corner, on the `<username>` menu, clear the check box **Warn about duplicate fax numbers/routing codes**.

New Fax Customization

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

The screenshot shows a dialog box titled "New Fax Customization" with a subtitle "Select the New Fax options that you want to make available to this group." The dialog is organized into several sections, each with a title and a list of options with checkboxes:

- Addressing:** Alternate fax number, To city/state, To company, Recipient type, Recipient fax ID, Voice number.
- Phonebook:** Add to phonebook, Phonebook selection.
- Cover Sheet:** Cover sheet selector, Cover sheet option, Cover sheet notes.
- Billing:** Billing Information #1 Entry Field, Billing Information #2 Entry Field, Billing code lookup.
- Attachments:** (The options are partially obscured by a scroll bar).

- Clear the check box for each option that you wish to hide. If required cover sheet information has been configured, then those fields cannot be edited here. To change them, see [Setting required cover sheet information on page 82](#).

Chapter 7: Creating signatures

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

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

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

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

To open the list of signatures

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

Editing and deleting signature files

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

To edit the properties of an existing signature

1. Select the signature in the list.
2. Click **Edit**. The **Edit Signature** page opens. For more information, see [Editing signature file properties below](#).

To delete a signature

1. Select the signature in the list.
2. Click **Delete**.
3. Do one of the following to confirm the deletion:
 - To only delete the entry, but not the image file, clear the **Delete associated image file** check box, and then click **Delete**.
 - To delete both the entry and the associated image file, select the check box, and then click **Delete**.

Editing signature file properties

To edit the properties of an existing signature

1. Select the signature in the list.
2. Click **Edit**.

The screenshot shows a dialog box titled "Edit Signature". It contains the following fields and controls:

- Signature ID:** An empty text input field.
- Owner's user ID:** A text input field containing the text "ADMINISTRATOR".
- Description:** An empty text input field.
- Image file name:** A text input field containing "0000000C.cfg" with a checkmark icon to its right.
- Authorized user IDs:** Three empty text input fields stacked vertically.
- Buttons:** "Ok" and "Cancel" buttons located at the bottom right of the dialog.

Signature ID

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

Owner's user ID

The user ID of the owner of the signature file.

Description

A description of the signature file.

Image file name

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

Authorized user IDs

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

Chapter 8: Creating a stamp library

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

- The library of stamp images is maintained by a RightFax administrator.
- Stamp image files only are available to users who do not have the Disallow Fax Annotations permission.
- Users can create stamps, unless they have the Disallow Fax Annotations permission.
- People who have delegate access to faxes cannot use or edit the personal stamp files of other users.

To open the list of stamp image files

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

Creating, deleting, and editing stamps

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

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

To create a library stamp image file

1. Using a graphics program, create a .gif, .tiff, .jpg, .png, or .bmp image. The maximum file size is 1 MB.
2. Click **New**. The **New Stamp** dialog box opens.
3. In the **Description** box, enter a description of the stamp.
4. Click **Select** and select the stamp image file.
5. Click **Ok**.

To import library stamp image files

1. Using a graphics program, create one or more .gif, .tiff, .jpg, .png, or .bmp images. Save the images in a folder that is accessible from the RightFax server. The maximum file size is 1 MB.
2. Click **Import**, and the **Import Stamps** dialog box opens.
3. Browse to locate the image files. Select the files, and then click **Open**.
4. In the **Import Stamp** dialog box, click **Import**.

To delete a library stamp image file

1. Select the stamp image file in the list.
2. Click **Delete**.

To edit the properties of a library stamp image file

1. Select the stamp image file in the list.
2. Click **Edit**. The **Edit Stamp** dialog box opens.
3. You have the following options:
 - In the **Description** box, edit the description of the stamp image.
 - In the **Select** box, import a different stamp image file.
4. Click **Ok**.

To create, edit, or replace a personal stamp file

1. Using a graphics program, create a .gif, .tiff, .jpg, .png, or .bmp image. The maximum file size is 1 MB.
2. In Web Admin, in the left pane, click **Users**. The list of users appears in the right pane.
3. Select the user in the list, and then click **Edit**.
4. In the **Edit User** dialog box, click **Personal Stamp**. The **Edit Personal Stamp** dialog box opens.
5. In the **Description** box, enter or change the description of the stamp.
6. Click **File**.
7. Browse to locate the image file. Select the file, and then click **Open**.
8. In the **Edit Stamp** dialog box, click **OK**.

Chapter 9: Creating overlay forms

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

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

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

To open the list of forms

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

Creating and deleting form files

You can create and edit overlay forms if your user profile includes that permission. For more information, see [Permissions on page 27](#).

To create an overlay form

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

To edit an overlay form

1. Select the form in the list.
2. Click **Edit**. The **Edit Form** dialog box opens.

3. See [Editing form file properties on the next page](#).
4. Click **OK**. The new form appears in the list of forms in EFM and Web Admin.

To delete a form

1. Select the form in the list.
2. Click **Delete**.
3. Do one of the following to confirm the deletion:

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

Editing form file properties

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

To edit the properties of an existing form

1. Select the form in the list.
2. Click **Edit**.

The 'Edit Form' dialog box is shown with the following fields and options:

- Form number: 1
- Form ID: COPY
- Description: Copy back ground
- Image file name: COPY:301
- Start page: 0
- Number of pages: 0
- Next form number: 0
- Secure form:
- Authorized group:
- Authorized user:

Form number

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

Form ID

Enter a unique name to identify the form.

Description

Enter a short description of the form.

Image file name

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

Start page

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

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

Number of pages

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

Next form number

To use a second form, enter its form number.

Secure form

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

Configuring two forms for use in a single fax

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

To configure two forms for use in a single fax document

1. Create two forms. See [Creating and deleting form files on page 60](#).
2. Edit the first and second form according to the instructions in [Editing form file properties on the previous page](#).

- To edit the properties of the first form:
 - a. In the **Start page** box, enter the first page after the cover sheet to which to apply the first form. If you enter **1**, the form will appear on the first body page.
 - b. In the **Number of pages** box, enter the number of pages to which to apply the first form. If the first form is only used on the first page, enter **1**.
 - c. In the **Next form number** box, enter the form number of the second form.
 - d. Click **OK**.
- To edit the properties of the second form:
 - a. In the **Start page** box, enter the first page number to which to apply the second form. In most cases, this value is set to **2**.
 - b. In the **Number of pages** box, to have the second form appear on all subsequent pages, enter **0** (zero). Otherwise, enter the number of pages to which to apply the second form.
 - c. Click **OK**.

Chapter 10: Connecting printers and scanners

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

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

To open the list of printers

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

Creating, deleting, and copying a printer

To add a new printer to RightFax

1. Click **New**.
2. Enter a **Printer ID** and the remaining printer properties. For more information, see [Editing printer properties below](#).

To delete a printer

1. Select the printer in the list.
2. Click **Delete**. Confirm that you want to delete the printer.

Editing printer properties

To edit the properties of an existing printer

1. Select the printer in the list.
2. Click **Edit**.

Printer ID

The printer's network ID.

Description

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

Printer type

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

Direct TCP/IP printing

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

Server name

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

Queue name

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

- The share name of the queue (LAN Server and Windows-based networks)
- The Bindery name of the queue, for example "LASER1." (Netware)
- The Distinguished Name of the queue object, for example "LASER1.SALES.ACME." (NetWare servers using NDS)

Default paper size

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

- **No Scaling.** The image is not scaled which can result in some portion of the page being truncated.
- **Fit Letter, Fit Legal, Fit A4.** The fax page is scaled to fit onto the printable area of the indicated paper size: U.S. letter (8.5 × 11 in.), U.S. legal (8.5 × 14 in.), or A4 (210 × 297 mm).

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

Default paper source

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

Importing printers into RightFax

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

To import printers

1. Click **Import**.

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

3. To change the default printer characteristics by which to search, under **Default Printer Settings**, select the printer driver, paper size, and paper source, and whether to search for printers set to print to an IP port.
4. Click **Select Printers**. Depending on the size of the network, this scan can take several minutes.
The list of available printers appears.
5. In the **Printer type** box, select **PCL** or **Postscript**.
6. Select the printers, and then click **OK**.

Configuring RightFax to automatically print faxes

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

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

To configure a user to automatically print sent and received faxes

1. Add at least one network printer. For more information, see [Creating, deleting, and copying a printer on page 63](#).
2. Open the user ID you want to configure. For more information, see [Creating, deleting, copying, and editing users on page 24](#).
3. Configure the user profile settings to automatically print sent and received faxes. For more information, see [Automatic Printing on page 34](#).

Chapter 11: Configuring the RightFax Server module

The RightFax Server module manages the network print queues assigned to faxing, controls the conversion of outgoing faxes, and works with the RightFax DocTransport module to schedule outgoing faxes and route inbound faxes.

To configure the RightFax Server module

- In Web Admin, in the left pane, click **System**, and then click **Configuration**.

In a Shared Services system, if you change the configuration of the RightFax Server module, then you must restart all of the RightFax services in order for the changes to take effect on all nodes of the system. To restart the services, see the *RightFax Administrator Guide*.

Configuring eTransport

The eTransport options configure the server to send outbound fax documents to email addresses in addition to fax numbers.

Enable outbound email

Select this check box to send outbound fax documents to email addresses in addition to fax numbers

SMTP connection

In the **SMTP connection** box, select the SMTP connection through which emails will be sent. If the SMTP connection is not listed, click **New**, and see [Configuring an SMTP connection for basic authentication on page 120](#).

SMTP service extensions

If the SMTP mail server uses SMTP service extensions, select this check box. SMTP service extensions start an SMTP session by issuing the EHLO command instead of the HELO command.

Email subject

You can customize the subject line of messages sent through the eTransport module. Use the following variables:

- ~1 = Page count
- ~2 = Sender's name.

The default message is: E-Document: ~1 page from ~2.

SecureDocs web server

Enter the Internet host name of the IIS server where the RightFax SecureDocs module is installed. This field is required if you have installed the RightFax SecureDocs module. For more information on

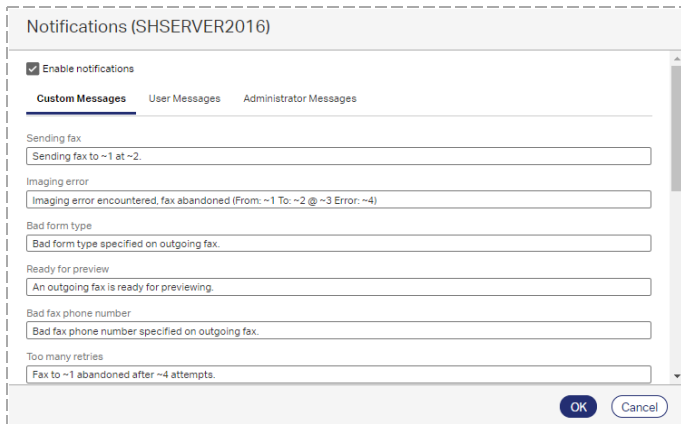
this option and configuring RightFax for certified document delivery, refer to the *RightFax SecureDocs Module Administrator Guide*.

To verify that eTransport is configured correctly

1. In Enterprise Fax Manager, stop the RightFax eTransport service.
2. Right-click the eTransport service, and select **Debug** to open a command prompt window. Leave this window open.
3. In FaxUtil, submit an email.
4. Check the open debug window for potential error messages.

Configuring custom messages

You can customize the text of messages that are sent for fax status notifications for users (described in [Notification on page 38](#)).



Notification messages can contain a combination of text and variable data. The maximum length of a notification message is 200 characters. If you include a URL, the maximum length is for both the URL and the message text. The maximum length of the URL is 80 characters.

The variable options for each message are described in the following table.

| Notification message | Variable options | When used |
|----------------------|--|---|
| Sending fax | ~1 = Recipient's name ~2 = Recipient's fax number ~3 = User ID ~4 = Recipient's company | The fax starts to send or is still sending after a few minutes. |
| Imaging error | ~1 = User ID ~2 = Recipient's name ~3 = Recipient's fax number ~4 = Error encountered ~5 = Unique ID of the fax ~6 = Subject line of original fax email | The server cannot generate a fax image. |
| Bad form type | ~1 = User ID ~2 = Unique ID of the fax | A bad form was specified. |
| Ready for preview | ~1 = User ID ~2 = Recipient's name ~3 = Recipient's fax number ~4 = Billing code 1 ~5 = Billing code 2 ~6 = Unique ID of the fax ~7 = Subject line of original fax email | The fax was held for preview and is now ready. |

| Notification message | Variable options | When used |
|----------------------|---|--|
| Bad fax phone number | ~1 = User ID ~2 = Fax phone number ~3 = Unique ID of the fax ~4 = Subject line of original fax | The fax number contains invalid characters. |
| Too many retries | ~0 = Unique ID of the fax ~1 = Recipient's name ~2 = Recipient's fax number ~3 = Fax error code ~4 = Number of retries ~5 = User ID ~6 = Billing code 1 ~7 = Billing code 2 ~8 = Recipient's company ~9 = URL link to the fax on the RightFax server (this option can only be used with RightFax email gateway) ~A = Subject line of original fax email | The fax was abandoned after the maximum number of send attempts. |

| Notification message | Variable options | When used |
|----------------------|---|---|
| Sending error | ~0 = Subject line of original fax email ~1 = Recipient's name ~2 = Recipient's fax number ~3 = Fax error code ~4 = Number of retries ~5 = User ID ~6 = Billing code 1 ~7 = Billing code 2 ~8 = Recipient's company ~9 = Unique ID of the fax | The fax could not be sent. |
| Incomplete fax | ~1 = User ID ~2 = Unique ID of the fax ~3 = Subject line of original fax email | The sender did not complete all of the required fax information fields. |
| Invalid billing code | ~1 = User ID ~2 = Billing code 1 ~3 = Billing code 2 ~4 = Unique ID of the fax ~5 = Subject line of original fax email | The sender did not provide a valid billing code. |

| Notification message | Variable options | When used |
|-----------------------|---|--|
| New fax | ~1 = Number of pages received ~2 = User ID ~3 = Received remote ID ~4 = TeleConnect ID ~5 = Unique ID of the fax ~6 = URL link to the fax on theRightFax server (this option can only be used with a RightFax email gateway) ~7 = Fax transmission speed ~8 = Fax status | A new fax was received. |
| Viewed or printed fax | ~1 = User ID ~2 = Unique ID of the fax | A received fax has not been viewed or printed. |
| Successful send | ~1 = Recipient's name ~2 = Recipient's fax number ~3 = Recipient's company ~4 = URL link to the fax on the RightFax server (this option can only be used with a RightFax email gateway) ~5 = Unique ID of the fax ~6 = Fax transmission speed ~7 = Subject line of original fax email | The fax transmission was successful. |

| Notification message | Variable options | When used |
|----------------------|--|--|
| Fax needs approval | ~1 = User ID ~2 = Recipient's name ~3 = Recipient's fax number ~4 = Unique ID of the fax ~5 = Subject line of original fax email | One of the sender's outgoing faxes needs approval. |
| Fax number blocked | ~1 = Recipient's name ~2 = Recipient's fax number ~3 = Fax error code ~4 = Number of retries ~5 = Billing code 1 ~6 = Billing code 2 ~7 = URL link to the fax on theRightFax server (this option can only be used with RightFax email gateway) ~8 = Unique ID of the fax ~9 = Subject line of original fax email | The recipient's fax number is blocked by the RightFax DocTransport. Fax numbers can be blocked using either dialing rules or the call blocking Windows Registry entry on the DocTransport. |

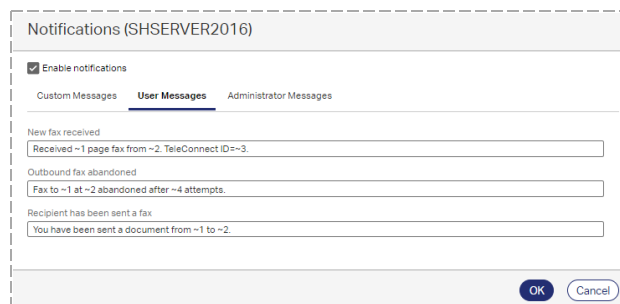
| Notification message | Variable options | When used |
|----------------------------|--|--|
| Human Answered Fax | ~1 = Recipient's name ~2 = Recipient's fax number ~3 = Fax error code ~4 = Number of retries ~5 = User ID ~6 = Unique ID of the fax ~7 = Subject line of original fax email | The fax was canceled (not accepted) by the recipient when the recipient responded to the RightFax voice prompt. |
| Fax blocked by Do Not Dial | ~0 = Subject line of original fax email ~1 = Recipient's name ~2 = Recipient's fax number ~3 = Fax error code ~4 = Sender's user ID ~5 = Billing code 1 ~6 = Billing code 2 ~7 = Recipient's company ~8 = URL link to the fax on the RightFax server (this option can only be used with RightFax email gateway) ~9 = Unique ID of the fax | A fax was not sent because the destination fax number was blocked by the Do Not Dial feature. (described on DnD Notifications on page 133.) |

To return a notification message to the default setting, select the text, delete it, and then click **OK**. The next time you open the dialog box, the default message will be listed.

Configuring user messages

Users can receive fax notifications via a messaging service such as SMS if they have been configured to do so in their user profiles (described in [Editing a user profile on page 25](#)). You can customize these fax notification messages.

For more information on configuring messaging services, see [Adding messaging services for notification messages on page 87](#).



For each user message type, enter the custom message text you want. Each message type has its own set of variables, described in the following table.

| Alert | Variables | When used |
|------------------|---|---|
| New fax received | ~1 = Page count ~2 = CSID or ANI of sender ~3 = TeleConnect ID ~4 = CSID ~5 = ANI | Sent to a RightFax user when a new fax is received. |

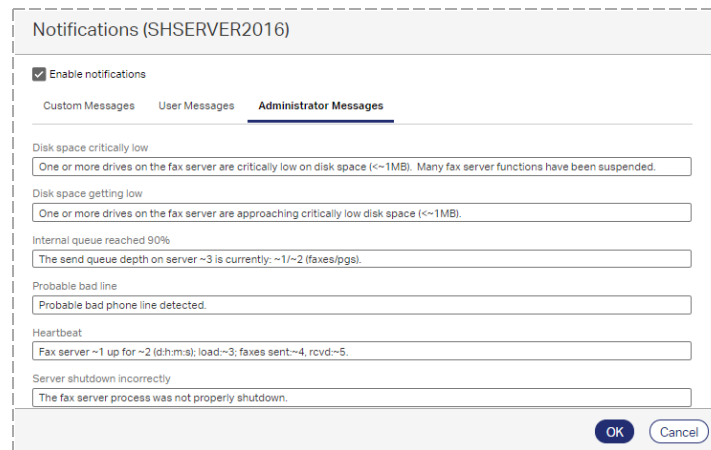
| Alert | Variables | When used |
|-------------------------------|--|--|
| Outgoing fax abandoned | ~1 = Recipient's name ~2 = Recipient's fax number ~3 = Short error description (last attempt) ~4 = Send attempts ~5 = Owner ID ~6 = Billing code 1 ~7 = Billing code 2 ~8 = Recipient's company ~9 = URL link to the fax on the RightFax server (this option can only be used with RightFax email gateway) | Sent to a RightFax user whose outbound fax has failed to send for any reason. |
| Recipient has been sent a fax | ~1 = From name ~2 = To name | Sent to the fax recipient to notify that a fax has been sent from the RightFax server. The fax recipient notification address is entered by the RightFax client user when creating a new outbound fax. |

To return a notification message to the default setting, select the text, delete it, and then click **OK**. The next time you open the dialog box, the default message will be listed.

Configuring administrator messages

Administrators can receive fax notifications via a messaging service such as SMS if notifications have been configured in their user profiles (described in [Editing a user profile on page 25](#)). You can customize these fax notification messages.

For more information on configuring messaging services, see [Adding messaging services for notification messages on page 87](#).



RightFax Enterprise edition includes a more comprehensive Alerting and Monitoring service where you can select from hundreds of server statistics to monitor and define the event thresholds, alert types, and alert messages to send. For more information about the RightFax Alerting and Monitoring service, see [Using the Alerting and Monitoring service on page 1](#).

For each admin message type, enter the custom message text that you want. Each message type has its own set of available variables, described in the following table.

| Alert | Default message | Variables |
|---------------------------|---|---|
| Disk space critically low | One or more drives on the fax server are critically low on disk space (<50MB). Many fax server functions have been suspended. | To change the default value for low disk space, see the <i>RightFax Administrator Guide</i> . |

| Alert | Default message | Variables |
|---|---|--|
| Disk space getting low | One or more drives on the fax server are approaching critically low disk space (<150MB). | To change the default value for critically low disk space, see the <i>RightFax Administrator Guide</i> . |
| Internal queue reached 90% | The fax server internal queue is more than 90% utilized. | None |
| Probable bad line | Probable bad phone line detected. | None |
| Heartbeat (periodic status including statistics on fax activity). | Fax server ~1 up for ~2 (d:h:m:s); load:~3; faxes sent:~4, rcvd:~5. | ~1 = Fax server name ~2 = Up time (dd:hh:mm:ss) ~3 = Fax server internal queue usage ~4 = Total faxes sent since install date ~5 = Total faxes received since install date |
| Server shutdown incorrectly | The fax server process was not properly shut down. | ~1 = Fax server name |
| DocTransport failed, one running | The DocTransport on ~1 is no longer running. Fax sending and receiving operations are functioning on other DocTransports. | ~1 = DocTransport machine |
| DocTransport failed, none running | All DocTransports are down. Fax sending and receiving is not currently operating. | None |

| Alert | Default message | Variables |
|---------------------------------------|--|---|
| Failed received fax | ~1 Inbound fax from ~2 to ~3. Pages received: ~4. Pages expected: ~5. Error (status=~6 line_status=~7) | ~1 = Time of the failure ~2 = Sender's fax number (ANI) ~3 = Recipient's fax number ~4 = Number of successfully received pages ~5 = Expected number of pages ~6 = Fax status ~7 = Fax line status |
| Cannot route a fax to a RightFax user | A fax was received with too few DID digits. | None |

To return a notification message to the default setting, select the text, delete it, and then click **OK**. The next time you open the dialog box, the default message will be listed.

Chapter 12: Creating billing codes

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

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

- Both billing codes on faxes, such as one code for account number and one for a matter number.
- Only one billing code, for example to track the individual or department sending the fax.
- No billing codes.

To open the list of billing codes

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

Customizing the use of billing codes

You can do any of the following:

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

- Require that all users enter one or both billing codes with each fax sent.
- Require billing codes for received faxes to track information about received faxes.
- Validate billing codes against the RightFax billing code list or against a list in an external application. If a supplied billing code does not match a billing code in the list, it is rejected and the fax is not sent.

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

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

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

To require billing codes before a fax can be sent

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

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

To require billing codes on received faxes

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

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

To validate billing codes

1. Click **Options**.
2. Select the **Validate billing codes** check box.

Creating, deleting, and copying billing codes

To create a billing code

- Click **New**. The **Edit Billing Code** dialog box opens. For information on completing each of the options, see [Editing billing code properties below](#).

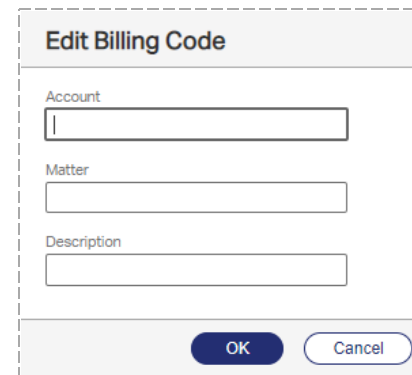
To delete a billing code

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

Editing billing code properties

To edit the properties of an existing billing code

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



The screenshot shows a dialog box titled "Edit Billing Code". It contains three text input fields: "Account", "Matter", and "Description". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Account, Matter

Enter one or two billing codes.

Description

Enter a descriptive name for the billing code.

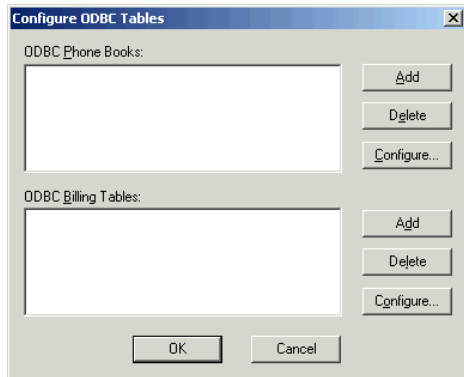
Making ODBC billing codes available in FaxUtil

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

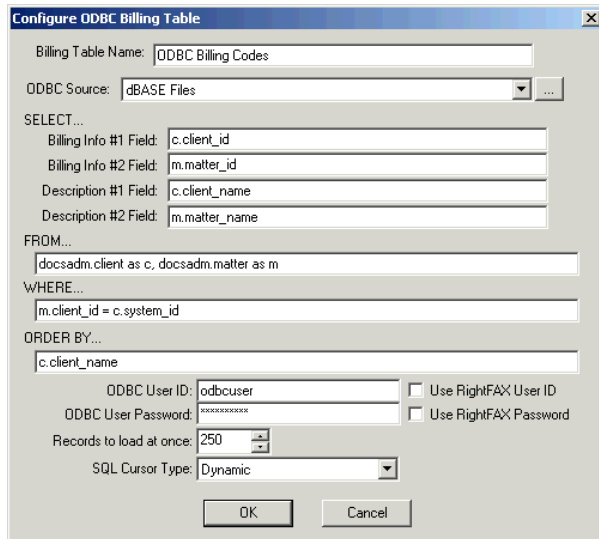
Each client workstation must be configured individually. After you configure the ODBC information on a user's workstation that has FaxUtil installed, that user can look up ODBC billing codes when sending faxes from FaxUtil.

To access the ODBC billing codes

1. In the Windows task bar, right-click the RightFax tray icon, and click **ODBC Configuration**. The **Configure ODBC Tables** window opens.



2. Under **ODBC Billing Tables**, click **Add**. The **Configure ODBC Billing Table** window opens.



3. Fill in the information according to your ODBC database specifications.

Billing Table Name

Enter a descriptive name for this billing codes table.

ODBC Source

Enter the name of your ODBC billing codes data source.

ODBC Field Names

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

ODBC User ID and Password

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

Records to Load at once

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

SQL Cursor Type

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

Chapter 13: Creating fax cover sheet templates

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

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

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

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

You can create the following types of cover sheet templates:

- HTML. See [Creating an HTML cover sheet template below](#).
- Microsoft Word. See [Creating a Microsoft Word cover sheet template on the next page](#).
- PostScript. See [Creating a PostScript cover sheet template on the next page](#).
- Printer control language (PCL). See [Creating a PCL cover sheet template on the next page](#).

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

After you create the cover sheets you need, import the files into RightFax. See [Managing cover sheet template files on page 81](#).

To open the list of cover sheets

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

Creating an HTML cover sheet template

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

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

- Use absolute paths to reference other files, such as graphics.
- Use cover sheet codes to specify information such as sender and destination data. For instructions, see [Inserting cover sheet codes on the next page](#) for a list of valid codes, see [Cover sheet codes on page 78](#).
- Save the file with a file name extension of .htm or .html.

Creating a Microsoft Word cover sheet template

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

- Word cover sheets support all language character sets supported by Word and Windows, including Hebrew. To show special characters, such as French accents, verify that ANSI mode is enabled on the code page of the server. See the *RightFax Administrator Guide*. Word cover sheet codes can also use any TrueType font.
- Use cover sheet codes to specify information such as sender and destination data. For instructions, see [Inserting cover sheet codes below](#). For a list of valid codes, see [Cover sheet codes on the next page](#).
- Save the file with a .docx extension.

Creating a PostScript cover sheet template

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

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

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

To create a PostScript cover sheet template

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

2. Print the .docx file to the RightFax printer.
3. Save the file with the file name extension .ps.

Creating a PCL cover sheet template

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

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

- For .doc source files, PCL cover sheets only can be created for Microsoft Word 2010 and previous versions. For later versions of Microsoft Word, convert the file to PostScript. See [Creating a PostScript cover sheet template above](#).
- Use cover sheet codes to specify information such as sender and destination data. For instructions, see [Inserting cover sheet codes below](#) for a list of valid codes, see [Cover sheet codes on the next page](#).
- To save the source file as a PCL file, print the document to a file, and select a printer driver that supports PCL 5 or later.
- Save the file with the file name extension .pcl.

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

Inserting cover sheet codes

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

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

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

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

To insert a code in a PCL cover sheet template

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

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

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

To insert a code in a Microsoft Word cover sheet template

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

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

- In the **Field codes** box, type **“coversheetcode”** so that the text in the box appears as **DOCVARIABLE “coversheetcode”**.

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

Example For the recipient’s company name, you would insert **DOCVARIABLE “FROMPHONENUM”**.

- Click **OK**. To view the added code, right-click in the location of the inserted DocVariable, and then click **Toggle Field Codes**. The inserted variable becomes visible.
- Apply a TrueType or native printer font to **{DOCVARIABLE “coversheetcode”*MERGEFORMAT}**

Cover sheet codes

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

| Cover sheet code | Maximum characters | Description |
|------------------------|--------------------|--|
| BILLINFO1 | 15 | Billing code 1 (if any). |
| BILLINFO2 | 15 | Billing code 2 (if any). |
| CALL_BACK CALLBACK2 | 31 | The callback information (if any). Note Not for Microsoft Word cover sheets. |

| Cover sheet code | Maximum characters | Description |
|------------------|--------------------|--|
| CCTEXT | 69 | <p>All the listed recipients of a fax (including CC and BCC recipients) in this format: Name,FaxNum;Name,Faxnum;...</p> <p>You can include up to 21 {CCTEXT} codes on a cover sheet, each code representing one line of recipients up to 69 characters long. Include one {CCTEXT} code on each line that contains recipients. The cover sheet only lists the number of recipients for which space is provided.</p> |
| DATEONLY | Variable | <p>The date that the fax cover sheet was generated. The date format is determined by the default date format on the RightFax server.</p> <p>Note Not for Microsoft Word cover sheets.</p> |
| EMAIL_ADDRESS | Variable | <p>The sender's email address from the RightFax user properties (See Editing a user profile on page 25).</p> <p>Note Not for Microsoft Word cover sheets.</p> |
| EMAILADDRESS | Variable | <p>The sender's email address from the RightFax user properties. (See Editing a user profile on page 25.)</p> |
| FAXDATE | Variable | <p>The date that the fax is created.</p> <p>Note Not for HTML or PCL cover sheets.</p> |
| FAXDIDNUM | 31 | The sender's fax number. |

| Cover sheet code | Maximum characters | Description |
|------------------|--------------------|---|
| FAXSENDDATE | Variable | <p>The date that the fax was sent.</p> <p>Note Not for HTML or PCL cover sheets.</p> |
| FROMCOMPANY | 59 | The sender's company name. |
| FROMCITYSTATE | 59 | The sender's city and state. |
| FROM_NAME | 59 | <p>The sender's name.</p> <p>Note Not for Microsoft Word cover sheets.</p> |
| FROMNAME | 59 | The sender's name. |
| FROM_PHONENUM | 31 | <p>The sender's phone number,</p> <p>Note Not for Microsoft Word cover sheets.</p> |
| FROMPHONENUM | 31 | The sender's phone number, available for all three types of cover sheets. |
| FROMPHONE | 31 | <p>The sender's phone number,</p> <p>Note Not for HTML or PCL cover sheets.</p> |
| GENERALFAXNUM | 31 | The company fax number for the sender's organization. |

| Cover sheet code | Maximum characters | Description |
|------------------|--------------------|--|
| NOTETEXT | 69 | The notes added to the fax when it was addressed. You can include up to 21 <NOTETEXT> codes on a cover sheet, each code representing one line of notes up to 69 characters long. Include one <NOTETEXT> code on each line that you want notes to be listed on. The cover sheet only includes as much note text as there is space allotted for. If the notes for a fax are shorter than the space provided by <NOTETEXT> codes, the remaining lines will be filled with blanks. |
| NUMPAGES | Variable | The number of pages in the fax body, not including the cover sheet. To include the cover sheet in the page count, use the <NUMPAGEESC> code. |
| NUMPAGEESC | Variable | The number of pages in the fax <i>including</i> the cover sheet. To exclude the cover sheet in the page count, use the <NUMPAGES> code. |
| OPERATORNUM | 31 | The general phone number for the sender's organization. |
| ROUTEINFO | Variable | The routing information entered in the user profile of the user creating the fax. (See Routing on page 32). |

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

| Cover sheet code | Maximum characters | Description |
|------------------|--------------------|---|
| TO_NAME | 59 | The recipient's name. Note Not for Microsoft Word cover sheets. |
| TONAME | 59 | The recipient's name. |
| UNIQUEID | 16 | The unique ID assigned to the outgoing fax. |
| USERID | 59 | The RightFax User ID. Note Not for HTML or PCL cover sheets. |
| USERNAME | 59 | The RightFax User Name, Note Not for HTML or PCL cover sheets. |
| WHEN_FAXED | Variable | The date and time the document was generated by the fax server. The time the fax was processed by the fax server can differ largely from the time it is actually sent as recorded on the TTI line, especially if you are using the RightFax Delay Send feature. Note Not for HTML or Microsoft Word cover sheets. |
| WHENFAXED | Variable | The date and time the document was generated by the fax server. The time the fax was processed by the fax server can be very different from the time it is actually sent as recorded on the TTI line, especially if you are using the RightFax Delay Send feature. |

Managing cover sheet template files

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

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

To add a cover sheet to the list

1. Click **New**.
2. Enter the following information:
 - **ID**. The text string that will appear when a user selects a cover sheet.
 - **Description**. The text string that will appear in the cover sheet list.
 - Click **Select**, and browse to the location of the cover sheet file. Select the file and click OK.
3. Click **Ok**. The cover sheet is copied to RightFax and appears in the list of cover sheets.

To delete a cover sheet from the list

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

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

1. Select the cover sheet, and then click **Edit**.
2. You can change any of the following information:
 - **ID**. The text string that appears when a user is selecting a cover sheet.

- **Description.** The text string that appears in the cover sheet list.
- To choose a new file for the ID, click **Select**, and browse to the location of the new file. Select the file, and then click **Open**.

3. Click **Ok**.

To preview a cover sheet file

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

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

Granting user permission to select a cover sheet

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

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

To set the user permission Can Change Cover Sheets

- See [Cover Sheets Defaults on page 31](#). Select the check box for the permission **Can Change Cover Sheets**.

Setting default cover sheets

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

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

To assign a default cover sheet to a RightFax user

- See [Cover Sheets Defaults on page 31](#).

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

- See [Cover Sheets on page 49](#).

To change the system default cover sheet

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

Setting required cover sheet information

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

To require cover sheet information

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

Cover Sheet Options

Sending Required Fields ^

- To name
- To fax number
- To contact number
- To company
- To city/state
- From name
- From voice phone number
- Fax number
- Company voice number
- Company fax number

Receive Required Fields v

OK Cancel

2. Under **Sending Required Fields**, select the check boxes next to the fields required for sending faxes. The **To fax number** option is always required. If a user sends a fax without filling in all required fields, the fax remains in the user's mailbox with the status *Information Incomplete*.
3. Under **Receive Required Fields**, select the check boxes next to the fields required for received faxes. If a fax arrives that does not include all required fields, the recipient will not be able to delete the fax until the required fields have been completed.

Chapter 14: Managing library documents

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

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

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

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

Creating a new library document

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

The new document will be available in the **Library Documents** list for all users except those in groups that do not have access to all library documents. For information about editing this group property, see [Cover Sheets on page 49](#).

To create a new library document in FaxUtil Web

1. Create the document in a word processor or other application from which you can print to the RightFax fax printer.
2. Send the fax image to your fax mailbox.
3. Open the received fax in FaxUtil Web, and on the **Fax** menu, click **Add to Library**. The **Add to Library** dialog box opens.
4. Specify a **Document ID** and **Description** for the new library document. For information about these and the remaining options, see [Editing library document properties on the next page](#).
5. Click **OK**.

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

The new document will be available in the **Library Documents** list for all users except those in groups that do not have access to all library documents. For information about editing this group property, see [Cover Sheets on page 49](#).

To create a new library document in Web Admin

1. Create the document in a word processor or other application from which you can print to the RightFax fax printer.
2. Send the fax image to your fax mailbox.
3. In Web Admin, in the left pane, click **Library Documents**.

4. In the right pane, click **New**. The **New Library Document** dialog box opens.
5. Specify a **Document ID** and **Description** for the new library document. For information about these and the remaining options, see [Editing library document properties below](#).
6. Click **OK**.

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

To automate the creation of new library documents

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

Editing library document properties

To edit the properties of an existing library document

1. In Web Admin, in the left pane, click **Library Documents**.
2. Select the document in the list, and on the **Edit** menu, click

Edit.

Edit Library Document

Document ID

Description

Image file name

Pages

Availability

LAN access

Web access

Fax on Demand access

Password

Include in catalog

Activation date

Expiration date

Document ID

Enter a unique code that identifies the library document.

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

Description

Enter a descriptive name for the library document.

Image file name

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

Pages

Enter the number of pages in the document.

LAN access

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

Web access

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

Fax on Demand access

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

Password

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

Include in catalog

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

Activation date

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

Expiration date

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

Deleting library documents

To delete a library document

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

Chapter 15: Adding messaging services for notification messages

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

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

Adding messaging services

To add a messaging service to RightFax

1. In Web Admin in the left pane, click **Messaging Services**.
2. Click **New**. The **New Messaging Service** dialog box opens. See [Editing messaging service properties](#) below.

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

- To configure fax status notifications and their mode of delivery for individual users, see [Notification on page 38](#). You can also configure a default notification method per group of users. See [General on page 47](#).
- To configure administrative alerts for individual administrative users, see [Administrative Alerts on page 36](#)).
- To use the RightFax Alerting and Monitoring service to create and

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

Editing messaging service properties

Each type of service you add requires different configuration settings.

Configuring SMTP services

Service ID

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

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

Service type

Select **SMTP**.

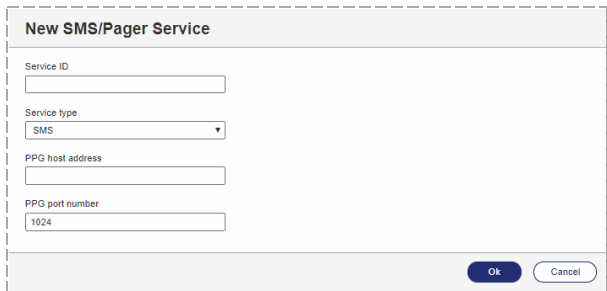
External connection

Select the SMTP connection through which emails will be sent. If the SMTP connection is not listed, click **New**, and see [Configuring an SMTP connection for basic authentication on page 120](#).

SMTP sender address

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

Configuring SMS via Push-Proxy Gateway services



Service ID

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

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

Service type

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

PPG host address

Use the default value for the PPG host.

PPG port number

Use the default value for the PPG port number.

Logging administrative alerts

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

To ensure that logging occurs using the special event identifier

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

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

To filter on these events

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

Chapter 16: Managing fax numbers

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

To open the list of fax numbers

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

Adding and deleting fax numbers

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

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

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

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

To add individual fax numbers

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

To add a range of fax numbers

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

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

To import fax numbers from a .csv file

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

To delete a fax number

1. Check if a number you want to delete is associated with a user or group. If yes, edit the user or group to disassociate the number.
2. Select the fax number or numbers in the list, and click **Delete**.
3. Click **Delete** to confirm the deletion.

Assigning a fax number to a user or group

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

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

To assign a fax number to a user

- Under **Routing**, in the **Routing code (DID/DNIS)** box, enter the fax number. See [Routing on page 32](#)

To assign a fax number to a group of users

- Under **Smart Fax Distribution**, in the **Routing code (DID/DNIS)** box, enter the fax number. See [Smart Fax Distribution on page 54](#).

To remove a fax number assignment

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


Activating fax numbers in the RightFax Connect Portal

If your RightFax implementation routes faxes to RightFax Connect and you plan to port fax numbers, you must activate the fax numbers

in the RightFax Connect Portal prior to the scheduled port date.

To activate fax numbers in the RightFax Connect Portal

1. Log on to the RightFax Connect Portal.
2. Under **Action Menu**, click **Manage Fax Numbers**.
3. In the **Available Numbers** list, select the check boxes of the fax numbers.

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

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

Chapter 17: Registering RightFax on MFPs

You must register RightFax on each MFP that you will use with the RightFax server. Registering detects the type of MFP and adds the appropriate RightFax application interface (the MFP app) to the device. Registering requires that you know the IP address of the MFP.

For more information about using an MFP with RightFax, see the RightFax Connector Administrator Guide for the MFP.

Step 1: Defining global MFP settings

Before adding MFPs, you must specify global settings that will apply to all MFPs that you add.

To define general MFP settings

1. In Web Admin, in the left pane, click **MFPs**.
2. In the right pane, click **Global MFP Settings**, and then click the **General** tab.
3. Enter the **RightFax server address**.
4. In the **Port** box, enter the port for the RightFax server.
5. To use TLS/SSL for the MFP app, select the **Connect securely** check box. Use this only if you have installed a certificate on the device. For information, see the documentation for your MFP.
6. Defaults for notifications for users about the status of faxes that are sent from MFPs can be configured under **Notification**

Defaults.

- In the **Condition** list, select the status of the faxes for which users will be notified: **Success**, **Failure**, or **Success and failure**.
 - Click **Print** to print a notification at the MFP.
 - Click **Email** to send a notification to the email address of the user who logs in at the MFP. In the **Email address** box, enter the email address where notifications will be sent if a user doesn't have an email address.
 - By default, an image of the first page of the fax is included with each notification about sent faxes. If you wish to include the second page of the fax instead of the first page, select the check box **Skip cover sheet on sent faxes (Show first body page)**.
7. Click **OK**. If you have modified the global settings, and you are prompted to re-register the devices, click **OK**. If you wish to re-register the devices at a later time, click **Cancel**. When you are ready to re-register all devices, click **Update All**.

Step 2: Adding MFPs

When you add an MFP, the RightFax server detects the MFP and adds the appropriate RightFax application interface (the MFP app) to the device.

To add an MFP

1. In Web Admin, in the left pane, click **MFPs**.
2. In the right pane, click **New**.
3. Enter a **Description**, and in the **Network address** box, enter the IP address or network name of the MFP.

If you use a non-standard port, append the port to the IP address separated by a colon. For example, *IP:port#*
4. Click **Detect**. The device type appears in the dialog box. The device type determines which options are available when registering RightFax on the device.
5. In the right pane, under **Register RightFax Connector**, if available, in the **Fax addressing restrictions** list, select **None** to not apply any addressing restrictions or **Phonebook Only** to require that users select recipients from the phonebook.
6. If available, select a **Default scanned page size**.
7. If available, you can change the default **Guest user account** (WALKUP) to any RightFax user account. This account will be the guest account for all users that wish to send faxes via RightFax.
8. Under **Notification Defaults**, select the defaults for notifying users about the status of faxes that are sent from the MFP.
 - In the **Condition** list, select the status of the faxes for which users will be notified: **Success**, **Failure**, or **Success and failure**.
 - Click **Print** to print a notification at the MFP.
 - Click **Email** to send a notification to the email address of the user who logs in at the MFP. In the **Email address** box, enter the email address where notifications will be sent if a user doesn't have an email address.

9. Under **Other**, if you wish to designate this printer for automated network print functions, select the **Also add a server printer** check box.
10. If you are modifying the settings for an MFP that was registered previously, select the **Update registration** check box.
11. Click **OK**. The device is added to the MFP list. If registration fails, the **Registered** column shows that the device is not registered.

To import MFPs from a .csv file

1. Create a .csv file. For each MFP, the file must include a line of text in the following format:

Description,NetworkAddress,Username>Password,GuestUser name,AddressingType,Skip,AddServerPrinter

The variables are described in the following list:

- **Description**. A description of the MFP.
- **NetworkAddress**. The IP address of the MFP.
- **Username**. The user name with administrative rights to the MFP. The user name will be used to install the RightFax software on the MFP.
- **Password**. The password for the user name with administrative rights to the MFP.
- **GuestUsername**. The user ID for the guest user account. Typically this is WALKUP.
- **AddressingType**. Restrictions for users when they address faxes on the MFP.
 - Enter **None** or **0** for no addressing restrictions.
 - Enter **Phonebook Only** or **2** to require the user to select recipients from the phonebook.
- **Skip**.

- Enter **True** or **1** to skip this MFP.
 - Enter **False** or **0** to install the MFP.
- **AddServerPrinter**. Designate this printer for automated network print functions.
 - Enter **True** to designate this printer for automated network print functions.
 - Enter **False** if you do not wish to designate this printer for automated network print functions.
2. In Web Admin, in the list of items, click **MFPs**.
 3. Click **Import**, and then click **Choose File**.
 4. Find and select the .csv file, and then click **Import**.
 5. To check the status of the device import task, on the `<username>` menu, click **View Task Monitor**. The Status column shows one of the following:
 - **In progress**. The task has not yet completed.
 - **Warning**. The process completed, but not all of the devices were successfully imported or created.
 - **Error**. The tasks did not complete. The associated error message appears in the **Output** column.
 - **Ok**. The task completed.
 6. If the task completed, click **View** to check how many devices were created. If there were problems, a **Download** link appears in the **Output** column. Click the link to download a file containing detailed information for each device not created.

To delete and unregister an MFP

1. In Web Admin, in the left pane, click **MFPs**.
2. In the right pane, click the MFP in the list, click **Delete**, and click **OK** to confirm the deletion. This deletes the MFP from the list and attempts to remove the RightFax application interface from the device.

If the device is deleted from the list but the device could not be reached, then you must re-add the device in Web Admin and delete it again.

To edit an MFP

1. In Web Admin, in the left pane, click **MFPs**.
2. In the right pane, click the MFP in the list, and then click **Edit**. The **Edit MFP** dialog box opens in the right pane.
3. Make any necessary changes, and under **Other**, select the **Update registration** check box.

If you change the network address, the MFP is considered new. The license will be transferred to the MFP, and RightFax will be registered on the device.
4. Click **OK**.

Chapter 18: Running RightFax reports

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

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

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

Generating RightFax reports

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

To open a report

1. In Web Admin, in the left pane, click **Reports**.
2. In the right pane, click **Open**. In the **Select Report** dialog box, select the report, and then click **Next**.
3. In the **Parameters** dialog box, enter all required parameters, such as the time frame. The parameters vary by report. See [Entering report parameters below](#).

Entering report parameters

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

Specifying a date range

To enter a range of dates

1. Under **Select start date**, do one of the following:
 - Enter a start date.
 - To include all data up to a specified end date, select **No lower limit**.
2. Under **Select end date**, do one of the following:
 - Enter an end date.
 - To include all data after the specified start date, select **No upper limit**.

Specifying RightFax users

To enter RightFax users

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

Specifying destinations

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

To enter destinations

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

Specifying actions to audit

To select actions to audit

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

To specify types of objects to audit

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

To specify values to audit

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

Calculating phone costs

To specify phone time costs

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

Specifying the number of channels

To specify the number of channels

- Enter the number of channels in the box.

Specifying a log out action

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

To select a log out action

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

Saving a report to file

To export fax report information to a specific file format

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

RightFax Advanced Audit Report

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

Data included

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

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

For each login or logout action:

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

To generate the Advanced Audit Report

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

RightFax Deleted Inbound Faxes

Data included

For each day:

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

Fax page count

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

To generate the RightFax Deleted Inbound Faxes Report

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

RightFax Deleted Outbound Faxes

Data included

For each day:

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

Fax page count

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

To generate the RightFax Deleted Outbound Faxes Report

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

Failed Received Fax Report: Unsuccessful Inbound Faxes by User

Data included

For each RightFax user ID:

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

Fax page count

- Total number of failed pages per user.
- Overall total number of failed pages for all users.

To generate the Received Fax Report: Inbound Faxes by User

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

Received Fax Report: Inbound Faxes by Day

Data included

For each day:

- RightFax user ID.
- Date and time the fax was received.
- Status of the fax (viewed or printed).
- DID number that the fax was sent to.
- Name or telephone number of the sending fax machine (remote ID).
- Status of the fax transmission.
- Number of pages in the fax.
- Length of time of the transmission.

Fax page count

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

To generate the Received Fax Report: Inbound Faxes by Day

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

Received Fax Report: Inbound Faxes by Remote ID

Data included

For each sending fax machine:

- Name or telephone number of the sending fax machine (remote ID).
- RightFax user ID of the user who received the fax.
- Date and time the fax was received.
- Status of the fax (viewed or printed).
- DID number that the fax was sent to.
- Status of the fax transmission.
- Number of pages in the fax.
- Length of time of the transmission.
- Overall total number of fax pages received by the user.

Fax page count

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

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

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

Received Fax Report: Inbound Faxes by User

Data included

For each RightFax user ID:

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

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

Fax page count

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

To generate the Received Fax Report: Inbound Faxes by User

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

Sent Fax Report: Outbound Faxes by Day

Data included

For each day:

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

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

Fax page count

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

To generate the Sent Fax Report: Outbound Faxes by Day

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

Failed Fax Report: Unsuccessful Outbound Faxes by User

Data included

For each sent fax that failed in transmission:

- RightFax user ID of the person who attempted to send the fax.
- Unique ID of the fax, as assigned by the fax server.
- The initial date and time that the server attempted to send the fax.
- The final date and time that the server attempted to send the fax.
- Name of the recipient.
- Name of the recipient company.
- Fax number of the recipient.
- Name or phone number of the recipient fax machine (remote ID).
- Status of the fax transmission.
- Length of time of the attempted transmission.

Fax page count

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

To generate the Failed Fax Report Unsuccessful Outbound Faxes by User

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

Fax Report: Outbound Faxes by Unique ID

Data included

For each sent fax:

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

Fax page count

- Overall total number of pages sent.

To generate the Fax Report: Outbound Faxes by Unique ID

1. Select **Outbound Unique ID**.
2. Specify the parameter date range.

Fax Report: Outbound Faxes by User

Data included

For each RightFax user:

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

Fax page count

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

To generate the Fax Report: Outbound Faxes by User

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

Detailed Billing Report - Billing Code 1: Outbound Faxes Only

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

Data included

For each fax:

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

Fax page count

- The overall total number of pages sent.

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

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

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

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

codes 1 and 2. Unless custom field names have been defined, billing code 1 appears as Account and billing code 2 as Matter.

Data included

For each fax:

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

Fax page count

- The overall total number of pages sent.

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

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

Detailed Billing Report - Billing Code 2: Outbound Faxes Only

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

Data included

For each fax:

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

Fax page count

- The overall total number of pages sent.

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

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

Summary Billing Report - Billing Code 1: Outbound Faxes Only

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

Data included

For each billing code 1:

- Number of pages.
- Elapsed time .

For all billing codes 1:

- Number of pages.
- Elapsed time.

Fax page count

- The overall total number of pages and elapsed time.

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

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

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

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

Data included

For each and all billing codes 1 and 2:

- Number of pages.
- Elapsed time .

For all billing codes 1 and 2:

- Number of pages.
- Elapsed time.

Fax page count

- The overall total number of pages and elapsed time.

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

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

Summary Billing Report - Billing Code 2: Outbound Faxes Only

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

Data included

For each billing code 2:

- Number of pages.
- Elapsed time .

For all billing codes 2:

- Number of pages.
- Elapsed time .

Fax page count

- The overall total number of pages and elapsed time.

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

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

Channel Usage Report: by Day

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

Data included

For each fax channel:

- Total minutes.
- Receive minutes.
- Send minutes.
- Utilization percentage.

For each DocTransport:

- Total minutes.
- Total receive minutes.
- Total send minutes.

For all DocTransports for each day:

- Overall total minutes.
- Overall total receive minutes.
- Overall total send minutes.

For all DocTransports and all days in the reporting period:

- Overall total minutes.
- Overall total receive minutes.
- Overall total send minutes.

To generate the Channel Usage Report: by Day

1. Select **Channel Usage**.
2. Specify the parameter date range.

Channel Usage Summary Report

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

Data included

For each fax channel:

- Total minutes.
- Receive minutes.
- Send minutes.
- Utilization percentage.

For each board server:

- Total minutes.
- Total receive minutes.
- Total send minutes.

For all board servers:

- Overall total minutes.
- Overall total receive minutes.
- Overall total send minutes.

To generate the Channel Usage Summary Report

1. Select **Channel Usage Summary**.
2. Specify the parameter date range.

RightFax Conversion Error Report

Data included

For each sent fax that failed to convert:

- The initial date and time that the server attempted to convert the fax.
- Unique ID of the fax, as assigned by the fax server.
- RightFax user ID of the person who attempted to send the fax.
- Error message.

To generate the Conversion Error Report

1. Select **Conversion Errors**.
2. Specify the parameter date range.

Delegates by User

Data included

For each RightFax user ID:

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

To generate the Delegates by User report

1. Select **Delegates by User**.
2. Specify the parameter user.

Destination Report: Outbound Faxes by Fax Number

This report lists faxes sent to a specific fax number.

Data included

For each fax number:

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

- Date the fax was sent.
- Name of the recipient.
- Name of the recipient company.
- Fax number of the recipient.
- Name or telephone number of the recipient fax machine (remote ID).
- Status of the fax.
- Number of pages in the fax.
- Unique ID of the fax, as assigned by the fax server.

Fax page count

- The overall total number of pages sent.

To generate the Destination Report: Outbound Faxes by Fax Number

1. Select **Destination Fax Number**.
2. Specify the parameters destination and date range.

Destination Report: Outbound Faxes by Remote ID

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

Data included

For each fax machine:

- RightFax user ID of the person who sent the fax.
- The user group of the user.
- Date the fax was sent.

- Name of the recipient.
- Name of the recipient company.
- Fax number of the recipient.
- Name or telephone number of the recipient fax machine (remote ID).
- Status of the fax.
- Number of pages in the fax.
- Unique ID of the fax, as assigned by the fax server.

Fax page count

- The overall total number of pages sent.

To generate the Destination Report: Outbound Faxes by Remote ID

1. Select **Destination Remote ID**.
2. Specify the parameters destination and date range.

Destination Report: Outbound Faxes by To-Company

This report lists faxes sent to a specific recipient company.

Data included

For each company:

- RightFax user ID of the person who sent the fax.
- The user group of the user.
- Date the fax was sent.
- Name of the recipient.
- Name of the recipient company.

- Fax number of the recipient.
- Name or telephone number of the recipient fax machine (remote ID).
- Status of the fax.
- Number of pages in the fax.
- Unique ID of the fax, as assigned by the fax server.

Fax page count

- The overall total number of pages sent.

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

1. Open **Destination_ToCompany.rpt**. Select **Destination To Company**.
2. Specify the parameters destination and date range.

Destination Report: Outbound Faxes by To-Name

This report lists faxes sent to a specific recipient.

Data included

The report shows for each recipient:

- RightFax user ID of the person who sent the fax.
- The user group of the user.
- Date the fax was sent.
- Name of the recipient.
- Name of the recipient company.
- Fax number of the recipient.

- Name or telephone number of the recipient fax machine (remote ID).
- Status of the fax.
- Number of pages in the fax.
- Unique ID of the fax, as assigned by the fax server.

Fax page count

- The overall total number of pages sent.

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

1. Open **Destination_ToName.rpt**. Select **Destination To Name**.
2. Specify the parameters destination and date range.

Failed Login Report

Lists the failed login attempts by user.

Data included

- Date of login.
- Time of login.
- RightFax user ID of the person who attempted to log in.
- Client application.
- Count of successive failed attempts.

To generate the Failed Login Report

1. Select **Failed Logins**.
2. Specify the parameters user and date range.

Fax Inactivity by User with Delegates

Data included

For each user with delegates:

- Date of last login
- User ID
- For each user ID: delegate count and list, delegator count and list
- User name
- Number of days inactive

To generate the Fax Inactivity report

1. Select **Fax Inactivity User**.
2. Specify the number of elapsed days since the last login.

Fax Printing Report: Faxes Printed by Group (s)

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

Data included

- Event date
- Printer ID
- Pages
- Copies
- Print time
- Notes

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

1. Select **Fax Printing Group**.
2. Specify the parameters groups on which to report and date range.

Fax Printing Report: Faxes Printed by User(s)

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

Data included

- Event date
- Printer ID
- Pages
- Copies
- Print time
- Notes

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

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

Fax Volume Report

The Fax Volume Report only can be run on RightFax CE 21.2 and later.

Data included

For each RightFax group:

- The number of pages received from toll numbers.
- The number of toll-free pages received.

- The total number of received pages.
- The number of pages sent to toll numbers.
- The number of toll-free pages sent.
- The total number of sent pages.
- The total pages sent and received per group.

Fax page count

- The total number of all pages sent and received.

To generate the Fax Volume report

1. Select **Fax Volume by Group**.
2. Specify the parameter date range and the RightFax user group or groups on which to report.

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

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

Data included

For each RightFax user ID:

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

- Number of pages in the fax.
- Length of time of the transmission.
- Transmission history, which consists of:
 - event date and time
 - off hook time
- Name or telephone number of the recipient fax machine (remote ID).
- Fax channel used for the transmission
- Number of pages transmitted
- Board result

Fax page count

- Total pages faxed and cost for the user

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

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

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

This report lists the details of all completed faxes.

Required SQL permission

- datareader
- execute

Data included

For each RightFax user ID:

- Date and time the fax was sent
- RightFax user ID of the person who sent the fax
- Name of the recipient
- Name of the recipient company
- Fax number of the recipient.
- Estimated cost based on transmission time and standard rates
- Status of the fax transmission
- Number of pages in the fax
- Length of time of the transmission
- Transmission history, which consists of:
 - event date and time
 - off hook time
- Name or telephone number of the recipient fax machine (remote ID)
- Fax channel used for the transmission
- Number of pages transmitted
- Board result

Fax page count

- Total number of pages and total costs for each user

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

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

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

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

Data included

For each fax:

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

Fax page count

- The overall total number of pages sent.

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

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

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

This report lists all faxes that were successfully sent.

Data included

For each fax:

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

Fax page count

- The overall total number of pages sent

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

1. Select **Fax Lists Summary Completed Faxes**.
2. Specify the report parameters destination and date range.

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

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

Data included

For each activity:

- Date and time of the action
- RightFax user ID of the person who owns the fax
- Operation (the action performed)
- Fax number or remote ID of recipient
- Status of fax document
- Unique ID of fax document

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

1. Select **Fax Lists Summary Human Routed Received**.
2. Specify the parameters user and date range.

Documents Received report

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

To generate the Documents Received report

1. Select **Fax Lists Summary Human Routed Received - Received Count**.
2. Specify the parameters user and date range.

Received documents sent to post fax processing report

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

To generate the Received Documents sent to Post Fax Processing report

1. Select **Fax Lists Summary Human Routed Received - EDC Count**.
2. Specify the parameters user and date range.

Time-of-Day Usage by Group - Inbound

Data included

For each RightFax group:

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

Fax page count

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

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

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

Time-of-Day Usage by Group - Outbound

Data included

For each RightFax group:

- The time of day
- The number of pages

- The number of minutes the fax took to send

Fax page count

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

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

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

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

This report shows all outbound activities for selected users for all faxes, including deleted faxes. The fax information appears sorted by user. The report requires execute SQL permission in addition to datareader permission.

Data included

For each fax:

- Date and time the fax was sent
- RightFax user ID of the person who sent the fax
- Name of the recipient
- Fax number of the recipient
- Estimated cost per minute
- Status of the fax transmission
- Number of pages in the fax
- Length of time of the transmission
- Total off-hook time for this fax

- Transmission History for each transmission attempt:
 - Event date and time
 - Remote ID of recipient device
 - Pages transmitted
 - Off-hook time
 - RightFax server name/Channel number
 - Board result: call status from fax board

Fax page count

- Total number of pages with estimated cost for each user

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

1. Select **Outbound Activities Users**.
2. Specify the parameters user, cost per minute, and date range.

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

This report shows all outbound activities for selected users for completed faxes only, including deleted faxes. The information is sorted by user. The report requires execute SQL permission in addition to datareader permission.

Data included

For each fax:

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

- Estimated cost per minute
- Status of the fax transmission
- Number of pages in the fax
- Length of time of the transmission
- Total off-hook time for this fax
- Transmission history for each transmission attempt:
 - Event date and time
 - Remote ID of recipient device
 - Pages transmitted
 - Off-hook time
 - RightFax server name and channel number
 - Board result: call status from the fax board

Fax page count

- Total number of pages with estimated costs for each user

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

1. Select **Outbound Completed Activities Users**.
2. Specify the parameters user, cost per minute, and date range.

Permissions by User

Data included

For each RightFax user:

- A list of the permissions granted to this user

To generate the Permissions by User report

1. Select **Permissions by User**.
2. Specify the parameter user.

Fax Printing Report

Data included

For each system printer (and local printer, if selected in parameters):

- Printer ID (if a local printer, the printer ID will be Local User Printers)
- RightFax user ID for each user of the printer
- Printer use method
- Number of uses (number of times each print method was logged for the user)

To generate the Fax Printing Report

1. Select **Printer Usage**.
2. To include local and system printers in the report, select **Include local user printers**. These printers will be listed after all system printers.

Time-of-Day Inbound Faxes Channel Usage Report

This report shows the total number of minutes used by all inbound channels for each hour of the day, and calculates a utilization percentage for both a hypothetical number of receiving channels and for the actual number of inbound channels used.

Example You have a 16 channel board server that on a given day receives faxes for 120 minutes in the hour between noon and one pm. To find out the percentage of capacity if this volume had occurred across only 4 channels, run the report for 4 receive-capable channels.

The resulting report would show the actual minutes (120), a utilization of 50% on 4 channels, and the actual utilization of 12.5% across all 16 channels. If you ran the report for 1 receive-capable channel, the utilization percentage column would show 200% capacity. One channel can only receive for 60 minutes each hour and the actual volume was 120 minutes.

Data included

For each hour:

- Minutes elapsed. If the date range spans more than one day, this will reflect a total of the reception time for all days for each hour (not an average).
- Percentage of capacity for entered number of channels.
- Percentage of capacity for the actual number of channels.

For all channels:

- The grand total number of minutes

The channel numbers that were actually used during the specified date range.

To generate the Time-of-Day Inbound Faxes Channel Usage Report

1. Select **Time of Day Inbound**.
2. Specify the parameters the number of receive-capable channels and date range.

Time-of-Day Outbound Faxes Channel Usage Report

This report shows the total number of minutes used by all outbound channels for each hour of the day, and calculates a utilization percentage for both a hypothetical number of sending channels and for the actual number of outbound channels used.

Example A 16 channel board server sends faxes for 120 minutes in the hour between noon and one pm on a given day. To find out the percentage of capacity if this volume had occurred across only 4 channels, run the report using “4” for the Send-Capable Channels field. The resulting report would show the actual minutes (120), a utilization of 50% on 4 channels, and the actual utilization of 12.5% across all 16 channels. If you entered “1” for the Send-Capable Channels field, the utilization percentage column would show a 200% capacity. One channel can only transmit for 60 minutes each hour and the actual volume was 120 minutes.

Data included

For each hour:

- Minutes elapsed. If the date range spans more than one day, this will reflect a total of the transmission time for all days for each hour (not an average).
- Percentage of capacity for entered number of channels.
- Percentage of capacity for the actual number of channels.

For all channels:

- The grand total number of minutes

The channel numbers that were actually used during the specified date range.

To generate the Time-of-Day Outbound Faxes Channel Usage Report

1. Select **Time of Day Outbound**.
2. Specify the parameters the number of receive-capable channels and date range.

Time-of-Day Usage Report

This report shows the total number of minutes used by all outbound channels for each hour of the day, and calculates a utilization percentage for both a hypothetical number of sending and receiving channels and for the actual number of outbound and inbound channels used.

Data included

For each hour:

- Minutes elapsed. If the date range spans more than one day, this will reflect a total of the transmission time for all days for each hour (not an average).
- Percentage of capacity for entered number of channels.
- Percentage of capacity for the actual number of channels.

For all channels:

- The grand total number of minutes.

The channel numbers that were actually used during the specified date range.

To generate the Time-of-Day Usage Report

1. Select **Time of Day Usage**.
2. Specify the parameters the number of channels and date range.

Inbound Fax Users by Transmission Time

Data included

For each RightFax user ID:

- Date
- Number of minutes of transmission time for the user's received faxes that day
- Total number of minutes of transmission time for the user's received faxes for all days

For all users:

- The overall number of minutes of transmission receipt time

To generate the Inbound Fax Users by Transmission Time report

1. Select **Usage Inbound Transmission Time**.
2. Specify the parameter date range.

Inbound Fax Use by Pages

Data included

For each RightFax user ID:

- Date
- Number of pages received that day
- Total number of pages received for all days

Fax page count

- The overall total pages received for all users

To generate the Inbound Fax Use by Pages report

1. Select **Usage Inbound Users**.
2. Specify the parameter date range.

Outbound Fax Users by Transmission Time

Data included

For each RightFax user ID:

- Date
- Number of minutes of transmission time for the user's sent faxes that day
- Total number of minutes of transmission time for the user's sent faxes for all days

For all users:

- The overall number of minutes of transmission time for sent faxes

To generate the Outbound Fax Users by Transmission Time report

1. Select **Usage Outbound Transmission Time**.
2. Specify the parameter date range.

Outbound Fax Use by Pages

Data included

For each RightFax user ID:

- Date
- Number of pages sent that day
- Total number of pages sent for all days

Fax page count

- Overall total number of pages sent for all users

To generate the Outbound Fax Use by Pages report

1. Select **Usage Outbound Users**.
2. Specify the parameter date range.

Server Inbound and Outbound Usage

Data included

For the server, for each group of users, and for each user ID:

- Total number of inbound pages
- Total number of outbound pages
- Total number of all pages

To generate the Server Inbound and Outbound Usage report

1. Select **Usage Server**.
2. Specify the parameter date range.

Top-10 Inbound Fax Users by Transmission Time

This report lists the 10 RightFax users whose received faxes used the most transmission time during the reporting period.

Data included

For each of the top 10 RightFax user IDs:

- Date
- Number of minutes of transmission time for the user's received faxes that day
- Total number of minutes of transmission time for all days

For all top 10 users:

- The overall number of minutes of transmission receipt time
- A bar chart of their transmission receipt times

To generate the Top-10 Inbound Fax Users by Transmission Time report

1. Select **Usage Top 10 Inbound Transmission Time**.
2. Specify the parameter date range.

Top-10 Inbound Fax Users by Pages

This report lists the 10 RightFax users who received the most faxes during the reporting period.

Data included

For each of the top 10 RightFax user IDs:

- Date
- Number of pages received that day
- Total number of pages received for all days

For all top 10 users:

- The overall total pages received by the top ten users
- A bar chart of their received faxes

To generate the Top-10 Inbound Fax Users by Pages report

1. Select **Usage Top 10 Inbound Users**.
2. Specify the parameter date range.

Top-10 Outbound Fax Users by Transmission Time

This report lists the 10 RightFax users whose sent faxes used the most transmission time during the reporting period.

Data included

For each of the top 10 RightFax user IDs:

- Date
- Number of minutes of transmission time for the user's sent faxes that day
- Total number of minutes of transmission time for all days

For all top 10 users:

- The overall number of minutes of transmission send time
- A bar chart of the transmission send times

To generate the Top-10 Outbound Fax Users by Transmission Time report

1. Select **Usage Top 10 Outbound Transmission Time**.
2. Specify the parameter date range.

Top 10 Outbound Fax Users by Pages

This report lists the 10 RightFax users who sent the most faxes during the reporting period.

Data included

For each of the top 10 RightFax user IDs:

- Date
- Number of pages sent that day
- Total number of pages sent for all days

For all top 10 users:

- The overall total pages sent by the top ten users
- A bar chart of their sent faxes

To generate the Top 10 Outbound Fax Users by Pages report

1. Select **Usage Top 10 Outbound Users**.
2. Specify the parameter date range.

User Inactivity

Data included

For each inactive user:

- Date of last login
- User ID
- User name
- Number of days inactive

To generate the User Inactivity report

1. Select **User Inactivity**.
2. Specify the elapsed number of days since the last login.

SQL queries

Delegate permissions audit report

The report shows when RightFax user's delegate permissions were changed, the users who made the changes, and the changes that were made.

```
SELECT ID, [Action], CreationTime AS [When
Changed UTC], Creator AS [Acting User],
CreatorModule AS [From Application],
AuditedValue AS [Changed Delegation
(Delegator/Delegate)], CorollaryAction AS
[Change]
FROM Audits
```

```
WHERE AuditedType = 'Delegate' AND
CorollaryAction <> ''
ORDER BY ID DESC
```

Disabled user audit report

These reports show when RightFax user accounts were disabled and the users who disabled them.

Option 1

This report only shows users that were disabled in RightFax CE 21.2 and later.

```
SELECT CreationTime AS [When Changed UTC],
Creator AS [Acting User], CreatorModule AS
[From Application],
AuditedValue AS [Changed User ID],
CorollaryAction AS [Change] FROM Audits
WHERE AuditedType = 'User' AND CorollaryAction
<> '' AND CorollaryAction LIKE '+Disabled'
ORDER BY ID DESC
```

Option 2

This report only shows users that were disabled in RightFax CE 21.2 and later.

```
SELECT * FROM Audits
WHERE AuditedType = 'User' AND CorollaryAction
<> '' AND CorollaryAction LIKE '+Disabled'
ORDER BY ID DESC
```

Option 3

This report shows all users that have been disabled regardless of the RightFax software version.

The following query lists all RightFax users that have been disabled. It does not show when the accounts were disabled or the users who disabled them.

```
SELECT * from Users
WHERE UserFlags & 0x00020000 > 0
```

Group properties audit report

The report shows when changes were made to properties of RightFax user groups, the users who made the changes, and the changes that were made. Note the following exceptions:

- Changes to cover sheets, library documents, fax numbers, and ODBC phonebooks that are associated with groups are not included in the report.
- Access control properties are not included in the report.
- Post fax processing properties are not included in the report.

SQL query

The dates in the following query are provided as an example.

```
DECLARE @StartDate DATETIME2 = '2017-10-31
05:00:00'
DECLARE @EndDate DATETIME2 = '2020-11-05
17:50:05.06'
SELECT TimeStart AS [When Changed UTC], Creator
AS [Acting User], [Action], CorollaryAction AS
FlagChanges, Groups.* FROM Groups
FOR SYSTEM_TIME FROM @StartDate TO @EndDate
JOIN Audits ON TimeStart = CorollaryTime AND
AuditedValue = GroupID AND AuditedType =
'Group'
ORDER BY TimeStart DESC
```

User permissions audit report

The report shows when changes were made to RightFax user permissions, the users who made the changes, and the changes that were made.

SQL query

```
SELECT CreationTime AS [When Changed UTC],
Creator AS [Acting User], CreatorModule AS
[From Application], AuditedValue AS [Changed
User ID], CorollaryAction AS [Change] FROM
Audits WHERE AuditedType = 'User' AND
CorollaryAction <> '' ORDER BY ID DESC
```

Chapter 19: Adding external connections

Connections to external services are required for sending and receiving emails, sending SMS messages, and routing to an FTP site.

To configure OAuth authentication for a connection to an SMTP or a POP3 email server, refer to the *RightFax Administrator Guide*. Connections with OAuth authentication must be created and managed in Enterprise Fax Manager.

Adding an external connection

To add an external connection

1. In Web Admin in the left pane, click **External Connections**.
2. Click **New**. The **New External Connection** dialog box opens. See [Configuring external connection properties](#) below.

Configuring external connection properties

Each type of external connection you add requires different configuration settings.

Configuring an FTP connection

To configure a connection to an FTP site

1. Click **New**. The **New External Connection** dialog box opens.

The screenshot shows a dialog box titled "New External Connection". It contains the following fields and controls:

- Name:** A text input field.
- Type:** A dropdown menu with "FTP" selected.
- Host name or IP address:** A text input field.
- Port number:** A text input field containing the value "21".
- Account:** A text input field.
- Authentication type:** A dropdown menu with "Basic" selected.
- Password:** A text input field.
- Test:** A button located below the password field.
- OK:** A button at the bottom right.
- Cancel:** A button at the bottom right.

2. In the **Name** box, enter a descriptive name for this connection.

3. In the **Type** box, select **FTP**, **FTP over SSL (FTPS)**, or **SSH File Transfer Protocol (SFTP)**.
4. In the **Host name or IP address** box, enter the IP address or the name of the server that is hosting the FTP site.
5. In the **Port number** box, enter the port number.
6. In the **Account** and **Password** boxes, enter the user name and password for the FTP site.
7. For FTP over SSL (FTPS), under **Certificate**, click the ellipsis button, browse to the location of the security certificate, and select it.
8. To test the connection, click **Test**.
9. Click **OK**.

Configuring an SMTP connection for basic authentication

You can configure an SMTP connection with basic authentication. To configure OAuth authentication for a connection to an SMTP email server, refer to the *RightFax Administrator Guide*.

To configure a connection to an SMTP email server for basic authentication

1. The **New External Connection** dialog box opens.

2. In the **Name** box, enter a descriptive name for this connection.
3. In the **Type** box, select **SMTP**. To send email messages with transport layer security (TLS), select **SMTP using TLS**.
4. In the **Host name or IP address** box, enter the IP address or the name of the SMTP server.
5. In the **Port number** box, enter the SMTP port number.

6. If an account is required by the SMTP server for basic authentication, then in the **Account** and **Password** boxes, enter the account and password.
7. Under **Authentication type**, select **Basic**.
8. To test the connection, click **Test**.
9. Click **OK**.

Configuring a POP3 connection

You can configure an POP3 connection with basic authentication. To configure OAuth authentication for a connection to a POP3 email server, refer to the *RightFax Administrator Guide*.

To configure a connection to a POP3 email server for basic authentication

1. Click **New**. The **New External Connection** dialog box opens.

The screenshot shows the 'New External Connection' dialog box with the following fields and values:

- Name: (empty text box)
- Type: POP3 (dropdown menu)
- Host name or IP address: (empty text box)
- Port number: 110 (text box)
- Account: (empty text box)
- Authentication type: Basic (dropdown menu)
- Password: (empty text box)
- Test: (button)
- Send password as: Auto (dropdown menu)
- OK: (button)
- Cancel: (button)

2. In the **Name** box, enter a descriptive name for this connection.
3. In the **Type** box, select **POP3** or **POP3 over SSL (POP3S)**.
4. In the **Host name or IP address** box, enter the IP address or the name of the POP server.
5. In the **Port number** box, enter the port number.
6. In the **Account** and **Password** boxes, enter the user name and password for the account on the POP server.

7. Under **Authentication Type**, select **Basic**.
8. If using POP3, under **Send passwords as**, select **Auto**, **Encrypted only (APOP)**, or **Clear text only**.
9. To test the connection, click **Test**.
10. Click **OK**.

Chapter 20: Configuring FTP routing

With FTP (File Transfer Protocol) routing, faxes are routed from the RightFax server to an FTP site.

Configuring RightFax for FTP routing

Configuring FTP routing includes the following tasks:

- Configure a connection to the FTP site.
- Configure users for FTP routing.

To configure a connection to an FTP site

1. In Web Admin, click **External Connections**. The list of connections appears in the right pane.
2. Click **New**. The **New External Connection** dialog box opens. See [Configuring an FTP connection on page 119](#).

To configure users for FTP routing

1. In Web Admin, click **Users**. The list of users appears in the right pane.
2. Select a user in the list, and then click **Edit**. The **Edit User** dialog box opens.
3. Under **Routing**, in the **Enter routing code box**, enter the user's fax number.
4. In the **Routing type** list, select **FTP**.

5. In the **External connection** list, select the network connection for the FTP site. If you have not configured a connection to an FTP site, click **New** and see [Configuring an FTP connection on page 119](#).
6. In the **File format** list, select the file format for the faxes. For more information, see [Routing on page 32](#).
7. In the **Routing info** box, enter the path to the folder on the FTP site. You have the option to use the following macros for the path.

| Macro | Definition |
|-------|---|
| ~1 | Date (YYYYMMDD) |
| ~2 | Day of the week (SUN-SAT) |
| ~3 | Month (JAN-DEC) |
| ~4 | Year (YYYY) |
| ~5 | Day of the month (DD) |
| ~6 | Month as decimal (01–12) |
| ~7 | User ID (up to 12 characters in 8.3 FAT format) |
| ~8 | Week as decimal (00–51) |
| ~9 | Billing Code #1 (up to 12 characters in 8.3 FAT format) |
| ~0 | Billing Code #2 (up to 12 characters in 8.3 FAT format) |

| Macro | Definition |
|-------|--|
| ~A | Remote ID (left to right, up to 12 characters in 8.3 FAT format) |
| ~B | Remote ID (right to left, up to 12 characters in 8.3 FAT format) |
| ~C | Group ID (up to 12 characters in 8.3 FAT format) |
| ~D | ANI (up to 12 characters in 8.3 FAT format) |
| ~E | Channel |
| ~F | Name of the fax server |
| ~G | Receive time hour (00-23) |
| ~H | Receive time minutes |
| ~I | Receive time seconds |
| ~J | Unique ID of the fax |

8. In the **Routing filename format** box, you have the option to define the format of the file name for each fax that is routed. Include one or more of the following macros in the path, and RightFax will dynamically name the files with the date, day of the week, user ID, etc. To ensure that file names are unique, it is recommended that you include the unique ID of the fax or a combination of macros that ensures that each file name is unique.

| Macro | Definition |
|-------|---------------------------|
| ~1 | Date (YYYYMMDD) |
| ~2 | Day of the week (SUN-SAT) |
| ~3 | Month (JAN-DEC) |
| ~4 | Year (YYYY) |
| ~5 | Day of the month (DD) |
| ~6 | Month as decimal (01-12) |

| Macro | Definition |
|-------|--|
| ~7 | User ID (up to 12 characters in 8.3 FAT format) |
| ~8 | Week as decimal (00-51) |
| ~9 | Billing Code #1 (up to 12 characters in 8.3 FAT format) |
| ~0 | Billing Code #2 (up to 12 characters in 8.3 FAT format) |
| ~A | Remote ID (left to right, up to 12 characters in 8.3 FAT format) |
| ~B | Remote ID (right to left, up to 12 characters in 8.3 FAT format) |
| ~C | Group ID (up to 12 characters in 8.3 FAT format) |
| ~D | ANI (up to 12 characters in 8.3 FAT format) |
| ~E | Channel |
| ~F | Name of the fax server |
| ~G | Receive time hour (00-23) |
| ~H | Receive time minutes |
| ~I | Receive time seconds |
| ~J | Unique ID of the fax |

9. Click **OK**.

Chapter 21: Creating dialing rules and Least-Cost Routing plans

When you use dialing rules you can precisely control outbound faxing by specifying rules and restrictions about how faxes are sent according to their destination fax numbers.

Example A dialing rule might specify that all faxes to a certain area code are sent via wide-area network (WAN) to another RightFax server, saving long-distance charges. Another dialing rule might specify that international faxes can only be sent at times of day when rates are lowest.

RightFax Least-Cost Routing (LCR) routes outbound faxes between RightFax Enterprise servers or RightFax Branch Office servers on a WAN to minimize long distance and other telephone charges. Least-Cost Routing includes dialing rules, load balancing, destination tables, InterConnect, and testing tools.

Creating, deleting, and copying dialing rules

Each dialing rule consists of the following parts:

- A number pattern of wildcard characters or a specific fax number. Outgoing faxes are checked if their destination fax numbers match this pattern or number.
- Rules and restrictions that will be applied if the destination fax number matches the pattern or number.

If one fax number matches multiple dialing rule patterns, the fax server weighs each rule according to how closely it matches the fax number, and then sends the fax according to the rule with the greatest weight.

Dialing rules are server-specific, allowing different rules for servers in different locations or serving groups with varying needs. If you have multiple RightFax servers, you can copy rules from one server to another. See the *RightFax Administrator Guide*.

To open dialing rules

- In Web Admin, click **Dialing Rules**. The list of dialing rules appears in the right pane of the window.

To add a new dialing rule

1. Click **New**. The **New Dialing Rule** page opens.
2. Complete the options, and then click **Ok**. See [Editing dialing rules below](#).

To delete a dialing rule

- Select the rule or rules in the list, and click **Delete**. To confirm the deletion, click **Delete**.

Editing dialing rules

To edit the properties of an existing dialing rule

1. Select the dialing rule and click **Edit**. The **Edit Dialing Rule** page opens.

2. In the **Comment** box, enter a comment about the rule.
3. As needed click the heading of the section you want to edit.

To temporarily disable the rule

- Select the **Disable rule** check box.

To enable the rule

- Clear the **Disable rule** check box.

To share with other nodes

- To share the rule on all nodes of a Shared Services system, select the **Share with other nodes** check box. Shared rules are shown with “(Shared)” after the rule number. The rule can be edited on any server where it appears.

To give the rule extra weight

When a fax number matches two or more dialing rules, RightFax weighs each rule according to how closely it matches the dialed number and uses the rule with the highest weight. This setting adds extra weight to the rule so it can be selected over another rule that has a better pattern match.

Dialing rule pattern characters are weighted as follows:

- digit match (0–9) = 10 points
- + (plus) = 0 points
- ? (question mark) = 5 points
- ~ (tilde) = 4 points

Matching

The Matching settings determine to which faxes the dialing rule will be applied. The main match is based on the destination fax number pattern, and additional matching options are available.

Pattern

The destination fax number pattern or number that the dialing rule applies to. RightFax ignores any hyphens, parentheses, or spaces in the pattern string. The pattern can include the digits 0–9, as well as the pound [#] and asterisk [*] keys.

You can use wildcard characters to define variables in the number pattern and thereby specify a range of numbers that the rule will apply to. The following table lists each wildcard character that can be used in the **Pattern** box and its definition.

| Wildcard | Definition | Examples | Weight |
|------------------|--|---|----------|
| + | Matches zero or more digits; must always appear at the end of number string. | + matches any fax number entered. 415+ matches any number that begins with 415, including 415-555-7000, 415-4455, and 4151. | 0 points |
| ~ | Matches zero or one digit; can be placed anywhere in the number string. | ~415+ matches any number beginning with 415 or [digit]415 including 415-555-7000, 415-3222, 1-415-555-7000, and 2415. ~~415+ matches 1-415-555-7000, 9-1-415-555-7000, and 415-555-7000. | 4 points |
| ? | Matches exactly one digit. | 415-555-7??? matches any number that starts with 415-555 and has its final four digits between 7000 and 7999. 415-???-???? matches any number within the area code 415. | 5 points |
| % [tableID,#] | Matches digits defined in a destination table to the number of digits specified (see Viewing destination tables on page 135). | 415-%[EAST,3]+ matches all numbers that begin with 415 and have a three-digit prefix defined in the destination table "EAST." | |
| N | Matches entries in the fax number list. N must be the only entry. | N matches all fax numbers that have been added to the fax number list in EFM, regardless of whether they are assigned. | |

Exact matches on the digits 0-9 have a weight of 10 points. Use of wildcard characters decreases the weight of a pattern match because wildcard character matching is always less specific than an exact match.

Example The fax number 520-555-7000 matches the patterns "520-555-700?" and "520+", but is always matched with the first rule because it is more specific.

Priorities

Matching based on priority can be useful when broadcasting faxes or other large volume faxing. It can also be useful for universal redirection of faxes (for example, to send all high priority faxes from Server2 instead of Server1).

Select the check boxes next to the priorities you want to match for this rule. Only faxes with the priority levels selected here will be considered for this rule.

Fax Traffic Type

Apply the dialing rule based on whether the fax or SMS was generated by the RightFax Integration Module for production faxing. You can restrict the rule to apply to:

- All traffic
- Production traffic only
- Non-production traffic only
- SMS traffic only

Minimum queue depth (in pages)

Specify the number of fax pages that must be waiting in the server's queue before this rule is considered. Use to define a dialing rule to offload outgoing fax traffic to another server when the load on the current server gets too high.

Minimum fax size (in pages)

Specify the minimum number of pages a fax must be before this rule is considered. Use to define a dialing rule to offload very large faxes to another server, leaving the local server free to send only smaller faxes.

Restrictions

You can restrict each dialing rule to specific servers, users, or groups in your organization.

Server Restrictions



All (Every)

The rule will be applied regardless of the origin of the fax.

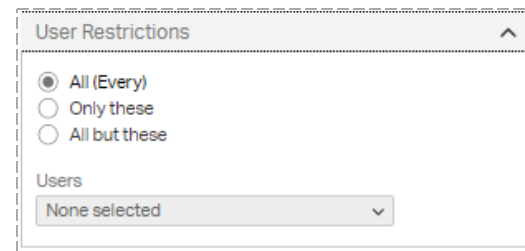
Only These

The rule will be applied to the servers you enter in the **Servers** box. Enter one or more server name or names. Use commas to separate multiple entries.

All But These

The rule will be applied to all servers except those you enter in the **Servers** box. Use commas to separate multiple entries.

User Restrictions



All (Every)

The rule will be applied regardless of the origin of the fax.

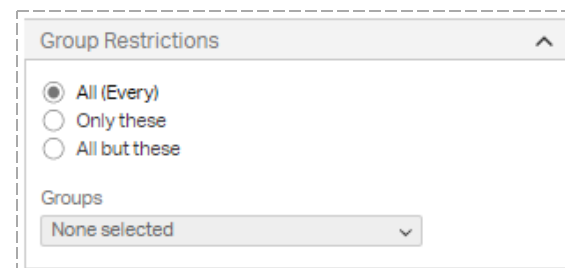
Only these

The rule will be applied to the users you enter in the **Select users** box. You can select one or more user IDs. Enter user IDs by selecting the check boxes next to the IDs in the list.

All but these

The rule will be applied to all users except those you enter in the **Select users** box. Enter one or more user IDs. Use commas to separate multiple entries. You can select one or more user IDs. Enter user IDs by selecting the check boxes next to the IDs in the list.

Group Restrictions



All (Every)

The rule will be applied regardless of the origin of the fax.

Only these

The rule will be applied to the users you enter in the **Select groups** box. You can select one or more group IDs. Enter group IDs by selecting the check boxes next to the IDs in the list.

All but these

The rule will be applied to all servers except those you enter in the **Select groups** box. You can select one or more group IDs. Enter group IDs by selecting the check boxes next to the IDs in the list.

Adjustments

The Adjustments settings determine how fax numbers that match the dialing rule can be modified to properly send from the specified destination.

You can add or remove digits from the beginning or end of the destination fax number (for example, to automatically add a 1 to long distance calls or a 9 if necessary to get an outside line).

You can also add a user’s international billing code or remove all but the last four digits of a number for internal routing.

Note If your organization requires a dialing prefix for all outgoing calls (including all outgoing faxes), specify the prefix in the Global Transport Settings of DocTransport Configuration. See the *RightFax Administrator Guide*. Do **not** specify the prefix in the dialing rules.

You can append or prepend any combination of dialable digits. You can also include special dialing characters that have special meaning to RightFax.

Dialing characters supported by dialing rules

The following table lists the dialable characters and their definitions. Characters are not case-sensitive.

| Character | Definition |
|-----------|---|
| 0–9 | Dialable phone digits. |
| ! | Hook-flash signal. |
| # | Pound button on phone. |
| * | Asterisk button on phone. |
| , (comma) | 1-second pause (you can combine several of these characters to increase the length of the pause). |
| A | Replaced in the dial string by the fax’s Billing Code 1 value. |
| B | Replaced in the dial string by the fax’s Billing Code 2 value. |
| C | Replaced in the dial string by the fax’s ToContactNum value (the recipient’s voice number). |
| D | Replaced in the dial string by the fax’s ToName value (the recipient’s name). Any undialable characters in this field are discarded. |
| E | Replaced in the dial string by the fax’s ToCompany value (the recipient’s company name). Any undialable characters in this field are discarded. |

| Character | Definition |
|-----------|---|
| F | Replaced in the dial string by the user's domestic long distance Auto Billing Code configured in DocTransport Configuration. See the <i>RightFax Administrator Guide</i> . |
| G | Replaced in the dial string by the user's international long distance Auto Billing Code configured in DocTransport Configuration. See the <i>RightFax Administrator Guide</i> . |
| I | 5-second pause (you can combine several of these characters to increase the length of the pause). |
| P | Pulse dialing mode. |
| T | Tone dialing mode (default). |
| W | Wait up to 15 seconds for a dial tone. |
| { | Do not prepend the dialing prefix. |
| } | Do not append the dialing postfix. |
| @ | Required for SR140 FoIP numbers. Appends the IP address of the FoIP router. |
| & | Indicates that a sequence of DTMF digits will follow. This applies to post-dialing for in-band FoIP calls using an SR140, The post-dial string can include PSTN Telephony characters such as 0-9, #, *, and a comma, but not p, t, w, and !. The digits will be dialed as soon as the SR140 receives a SIP 183 or SIP 200 response code or a H323 message from the gateway. Note To use DTMF post dialing, the <code>post_dialing_enable</code> parameter must be enabled on the SR140. |

Example For international calls, a dialing rule **001+wGii** (001=Pattern;wGii=Append) specifies that if the first three digits of an outgoing call are the international dialing prefix (pattern of **001+**), RightFax will wait for a dial tone (**w**), look up the user's international billing code to dial (**G**), and wait 10 seconds before dialing it (**ii**).

Example For post-dialing for in-band FoIP calls using an SR140, a dialing rule including **@172.17.9.225&5555** appended, specifies that if the gateway's IP address is **@172.17.9.225**, the SR140 will post-dial the digits 5555 as soon as one of the following has been received from the gateway: a SIP 183, SIP 200, or H.323 message.

Adjust fax priority

Enter **-2**, **-1**, **1**, or **2** to add or subtract priority points for all faxes that match the dialing rule pattern. Enter **0** to not change the priority. Priority is rated on a three-point scale: low priority ≤ 1 , normal priority = 2, high priority ≥ 3 .

Destination

The Destination settings determine where in your organization a fax matching the dialing rule pattern will be routed before the destination fax number is dialed.

Note Entries in the **name** boxes are limited to 47 characters. This means that you can enter fully qualified domain names that have 47 or fewer characters, including periods and backslashes. If the domain name is longer, use the IP address instead.

Send via fax server

Select this option to route the fax to any RightFax Enterprise or RightFax Branch Office server (including the local server) on your network. The new server evaluates the destination fax number against its own dialing rules and transmits or forwards the fax accordingly.

- After you select this option, in the **Server name** box, enter the destination server name to use for routing.

Note Take care not to create dialing rules on two or more servers that will cause a fax to loop between them. If this occurs, RightFax sends the fax after ten loops.

Receive into fax server

Select this option to route the fax to a RightFax Enterprise or RightFax Branch Office server (including the local server) on your network and deliver them as inbound faxes. You can use this option to define intra-office routing rules that let RightFax users in your organization send faxes to each other across different fax servers on the network.

If the fax number does not match a routing code on the receiving RightFax server, the fax is routed to the Default user ID on that server.

1. After you select this option, in the **Server name** box, enter the destination server name to use for routing.
2. To include a TTI line on the fax, select the **Insert TTI** check box. By default, faxes received into the fax server do not include a TTI line.
3. In the **Fax ID** box, specify the fax ID that should appear in the TTI line.

Send via transport

Select this option to select one of the transport methods that you added and configured in the RightFax DocTransport module as the fax destination, rather than a specific RightFax server. See the *RightFax Administrator Guide*.

After you select this option, select a transport method in the **Transport name** list. The transport must have been added in the DocTransport module. You can select from the following transport methods:

- **FOIP**. The fax will be transmitted packaged as an email message with a TIFF attachment via your SMTP server via fax over IP (FoIP).

To specify the email address of the destination device, click **Adjustments**, strip all of the digits from the destination fax number, and then prepend the destination email address.

- **RFCONNECT**. The fax will be routed to RightFax Connect. RightFax Connect requires a ten-digit phone number. Depending on your incoming digits, you may need to make changes under Adjustments.
- **SMS**. The fax will be routed to an SMS number. When a fax is sent to an SMS device, only the cover page notes are transmitted.

To specify the destination SMS number, under Adjustments, strip all of the digits from the destination fax number, and then prepend the desired SMS number. For information about making changes under Adjustments, see [Adjustments on page 129](#).

Time and Day

The Time and Day settings determine for each day the time period to apply the rule. You can use these settings to take advantage of special off peak phone rates or to balance fax loads between servers at the times when your fax traffic is the highest.

Time and Day

00-23 = rule is applied all day
Blank = rule is not applied all day

Monday
00-23

Tuesday
00-23

Wednesday
00-23

Thursday
00-23

Friday
00-23

Saturday
00-23

Sunday
00-23

Quick Sets

All Times Weekend Weekdays
Peak Times Never

Days (listed separately)

For each day on which the rule should be applied, enter *hh-hh* to specify the time range. *hh* is the time in 24-hour format. Do not specify minutes. To change the hours that a rule is applied, do one of the following:

- To specify multiple time ranges, enter the time ranges separated by comma in the format *hh-hh, hh-hh*.
Example To have a rule apply nights only between 7 P.M. and 2 A.M., enter **00-02,19-23** in each day of the week box.
- To not apply a rule during a given day, delete any entries and leave the box blank.

Note If you enter a range that straddles two days, the system divides the time between the current and the next day, adding the time range for the next day to any existing time ranges. Verify that the time ranges for each day are correct.

Quick Sets

Click one of the following to quickly apply common time restriction settings:

- All Times** applies 00-23 from 00:00:00 to 23:59:59 every day. This is the default.
- Weekend** applies 00-23 to Saturday and Sunday and removes all weekday settings .
- Weekdays** applies 00-23 to Monday through Friday and removes all weekend settings.
- Peak Times** applies 00-18 to Monday through Friday and removes all weekend settings.
- Never** removes all settings.

Special Actions

Use the Special Actions settings to set special sending options, such as sending at specific times or on specific channels, increase the weight of the rule, or disable it.

No special action

Click to process faxes without delay on any available channel.

Send on specific range of channels

Click to send the fax only on the channels you specify. The channel range specified here overrides any channel restriction placed on a specific fax using the <CHANNEL> embedded code. This parameter is not transferred with the fax if it is routed to another fax server for sending.

Disallow sending

Select this option to prevent faxes from sending based on attributes such as the number pattern, time of day, or sender. The user gets the message “Fax blocked from dialing phone number.” This is sometimes referred to as the Do Not Dial or DnD feature. For information about setting notifications for disallowed faxes, see [DnD Notifications below](#).

Reschedule after disallow sending

Select this option to prevent faxes from sending based on attributes such as the number pattern, time of day, or sender and then, based on the settings on the Time and Day tab, retries faxing at the same time each subsequent day until the fax is either sent or blocked altogether.

Example If a user tries to send a fax at 1 P.M. on Saturday and has weekend time restrictions in effect, the fax is not sent until 1 P.M. on Monday, when dialing rules no longer restrict sending.

Delay fax to specific time

Select this option to prevent the fax from sending before a specified time of day. If the specified time is earlier than the time the fax is received, the fax will be sent at that time on the next day.

In the **Delay until** box, enter the time using 24-hour notation (0000–2359).

Note Least-Cost Routing rules are evaluated one time. If this setting delays transmission, other settings for the rule will not be evaluated.

Delay fax for specific interval

Select this option to delay the fax from sending for a specified number of minutes. In a Shared Services environment, using this option in conjunction with a dialing rule of greater weight that will send the faxes immediately, you can prevent faxes from being sent by a DocTransport with incompatible telephony settings in case the original DocTransport is down.

In the **Minutes to delay** box, enter the number of minutes to delay.

Note Least-Cost Routing rules are evaluated one time. If this setting delays transmission, other settings for the rule will not be evaluated.

DnD Notifications

DnD notifications notify about faxes that were blocked by the Disallow Sending feature. Disallow Sending is also referred to as Do Not Dial (DnD). For more information, see [Special Actions on the previous page](#).

Users to notify

Enter the RightFax user IDs to which to send notifications about faxes that are blocked by the Disallow Sending feature.

Under **Users to notify**, select the check box for each user to notify.

Notify the sender that the document was blocked

Select this check box if you want the sender to be notified after attempting to send a fax to a blocked number.

If this option is not selected, the sender will get the “Fax number blocked” custom message. To configure this message, see the *RightFax Administrator Guide*.

Example of dialing rules

Example A company with RightFax servers in New York and Seattle adds the following dialing rules on the New York server:

- 206-???-????
Remove first three digits and send via Seattle server
- 206-820-50??
Remove first six digits and receive into Seattle server

When someone in New York sends a fax to 206-820-7000 (a customer in Seattle) the server routes the fax to the Seattle server which sends it via a local call. When someone in New York sends a fax to a co-worker in Seattle at 206-820-5065, the server considers the fax a received fax and routes it to the appropriate internal fax mailbox (5065).

Testing dialing rules and fax routes

You can test and confirm your dialing rules and fax routing scheme without sending a fax.

To start testing

- In Web Admin, in the left pane, click **Dialing Rules**. The testing options appear in the right pane.
- Open the list of dialing rules, and then click **Test Dialing Plan**.

To verify the route of a fax

1. In the **Fax Number** box, enter a fax number. You can also enter a specific **User ID**, **Group ID**, **Fax priority**, and **Number of pages** to test how each affects the fax routing.
2. To test routing for production faxes, select the **Integration fax** check box. Production faxing is implemented with the optional Integration module.

3. If the dialing rule applies to SMS messaging, select the **SMS message** check box.
4. Click **Trace Route**. As the fax number passes one or more servers, the results box shows the following:
 - Which rules are being used.
 - How the fax number is manipulated along the way.
 - The number of hops or jumps from server to server.
 - The time it takes to route between servers. This does not include the time to transfer image data. That additional time depends on the size, resolution, and density of the fax.

To verify dialing rule execution

1. In the **Fax Number** box, enter a fax number. You can also enter a specific **User ID**, **Group ID**, **Fax priority**, and **Number of pages** to test how each affects the route and execution of the dialing plan.
2. To test the rule execution for production faxes, select the **Integration fax** check box. Production faxing is implemented with the optional Integration module.
3. If the dialing rule applies to SMS messaging, select the **SMS message** check box.
4. Click **Execute Rules**. As the fax is routed, the results box shows the following:
 - Each dialing rule against which the fax number is compared.
 - Information about the match weights and server availability.

Viewing destination tables

Destination tables contain groups of numbers such as dialing prefixes and area codes. You can use destination tables to create dialing rules

for a range of numbers instead of creating a separate rules for each number pattern. For information about creating destination tables, see the *RightFax Administrator Guide*.

To open the list of destination tables

- In Web Admin, in the left pane, click **Destination tables**. The list of destination tables appears in the right pane.

Blocking outbound calls

You can prevent users from sending faxes to certain numbers by using dialing rules in combination with a destination table.

The DocTransport module by default blocks all outgoing calls to numbers beginning with 911 (the standard emergency number throughout the United States). All non-numeric characters are ignored by DocTransport.

Example If a user sends a fax to ,,911, DocTransport ignores the two preceding commas, matches 911, and then blocks the number.

Note You can also use the Windows registry keys for DocTransport BlockedNumbers and BlockingFlags to further block faxes to specific numbers and control sending to 911. Entries added in the BlockedNumbers registry key are written to the database and applied to all DocTransports on all servers. See the *RightFax Administrator Guide*

To add or change blocked numbers

1. Create a destination table for the numbers you want to block. See the *RightFax Administrator Guide*.
2. Create a dialing rule that uses that table for the matching string.
3. Edit the dialing rule to **Disallow sending**.
4. Save the rule.

Full RightFax administrators can approve, disapprove, or delete faxes that were blocked by dialing rules. Approved faxes are immediately scheduled to send. Disapproved faxes are assigned a status of “Fax was disapproved” in the original sender’s FaxUtil mailbox.

To approve or disapprove a fax blocked by a dialing rule

1. Sign on to FaxUtil as an administrator and on the **List** menu, click **Administrative Mode**
2. To view only faxes needing approval, on the **List** menu, click **Needing Approval**.
3. Right-click the fax. On the shortcut menu, point to **Status**, and then click **Approve Fax** or **Disapprove Fax**. You can add a note (up to 450 characters) to be stored in the fax history together with the date and your user ID

Examples of Least-Cost Routing

This section describes several examples of Least-Cost Routing.

Scenario 1: Using LCR (a simple example)

PDQ Company has a RightFax server in New York City (NYSERVER) and one in Tucson (TSNSERVER).

PDQ determines that it would be cheaper to send New York faxes bound for Tucson and Southern Arizona numbers via TSNSERVER. It adds this rule to NYSERVER:

```
520+
Send via fax server TSNSERVER.
```

Scenario 2: Using dialing destination tables

PDQ Company wants to make sure that TSNSERVER will correctly dial Southern Arizona numbers outside of Tucson by prepending a 1.

PDQ could add rules to TSNSERVER that prepend all numbers that have a certain prefix, such as 458, with 1 and as needed strip the 520 area code before prepending the 1:

```
458+
Send via local fax server. Prepend 1.
```

```
520-458+
Send via local fax server. Strip 3 digits from beginning. Prepend 1.
```

But PDQ determines that area code 520 includes several prefixes for which similar rules would need to be created. To avoid having to create individual rules for each prefix, PDQ creates a destination table named SOUTH AZ that includes all necessary prefixes. And it creates the following two rules on TSNSERVER referencing the SOUTH AZ destination table:

```
%[SOUTH AZ,3]+
Send via local fax server. Prepend 1.
```

```
520-%[SOUTH AZ,3]+
Send via local fax server. Strip 3 digits from beginning. Prepend 1.
```

Scenario 3: Distinguishing ‘+’ wildcard rules from other local numbers

The PDQ system administrator for NYSERVER notices that faxes bound for internal four-digit PBX numbers in New York that begin with 520 are being inadvertently routed to Tucson. In addition, New York just added a prefix for the Tri-State area of 520 (requiring a 1 to be dialed first from the PDQ office.) Those calls too are going to Tucson. To correct this situation, the administrator adds these two rules to NYSERVER:

```
520?
Send via local fax server.
```

```
520-????
Send via local fax server. Prepend 1.
```

These two rules intercept 520 calls that would otherwise match the 520+ rule in Scenario #2. These rules would match the local destination numbers more specifically and therefore be weighted more heavily.

Scenario 4: Stripping unnecessary digits

The PDQ system administrator for NYSERVER has also noticed that recent transfers from the Tucson site out of habit still dial a 1 at the beginning of ten digit long distance numbers. Because the PDQ New York long distance carrier does not require it, the administrator adds a rule to NYSERVER to strip the 1 from these numbers:

1-???-???-????

Send via local fax server. Strip 1 beginning digit.

Scenario 5: Using LCR (an advanced example)

PDQ Company opens a sales office in Los Angeles with a new RightFax server (LASERVER). PDQ and the local phone companies in L.A. have worked out a special low rate for all calls in the local Los Angeles/Orange County area. A similar deal was worked out for the New York metro area. This means PDQ can save money by routing all LA faxes to the LASERVER and all NY faxes to the NYSERVER. Because of charges related to the TCP/IP connection between L.A. and N.Y., it is still cheaper to send faxes during off-peak periods to L.A. and N.Y. via direct long distance dialing.

PDQ would first set up the following destination tables:

- On NYSERVER an LA area code table (LAACODE) and an LA area code+destination table (LAPREFIX).
- On LASERVER a NY area code table (NYACODE) and a NY area code+destination table (NYPREFIX).

LAACODE and NYACODE each contain a list of area codes that match the low-rate phone numbers in their respective regional areas. LAPREFIX and NYPREFIX match numbers with low rates in area codes where only certain prefixes in area code are included in the special low rate.

PDQ would define the following two rules on NYSERVER:

%[LAACODE,3]+

Time of day set to peak times. Send via fax server LASERVER.

1%[LAPREFIX,6]+

Time of day set to peak times. Send via fax server LASERVER.

LASERVER would have a matching set of rules referencing NYACODE and NYPREFIX and routing to NYSERVER. Peak times are specified because it is still cheaper to send in the evening and at night via long distance.

A local rule stripping off the unnecessary area code is required on both the NYSERVER and LASERVER. PDQ adds this rule on NYSERVER and a similar rule on LASERVER:

212+

Send via local fax server. Strip 3 digits.

To enable Least-Cost Routing for TSNSERVER to NY and LA, a copy of each of the four destination tables and each of the dialing rules would be entered on TSNSERVER.

Scenario 6: Boosting priority

PDQ Company is expanding and the load on the RightFax servers is increasing. PDQ decides to boost the priority of faxes from certain high priority Groups and Users on LASERVER to verify that their faxes are sent quickly. This rule is added to LASERVER:

+

Restricted only to Users: SALESMGR,CFO and to Group: TOPDOGS. Priority Delta +1.

Scenario 6: International routing

PDQ Company expands into the international market. Their first overseas site is London which has a RightFax server installed (UKSERVER). All faxes from LA, NY, and Tucson bound for England need to be routed to UKSERVER. This rule is added to each of these servers:

011-44+

Send via fax server UKSERVER.

Rules would need to be placed on UKSERVER to normalize the phone numbers for England (such as stripping area codes or adding digits if necessary).

Scenario 7: Load balancing

PDQ adds another RightFax server to its expanding NY site (NYSERVER2). Usage data indicates that during peak times, faxes on NYSERVER are taking on average several minutes longer to be sent than those on NYSERVER2. Upon analysis, PDQ finds that the users of NYSERVER are sending many more faxes than the users on NYSERVER2.

By entering these two rules on each server, new outgoing faxes on each server are routed to the one with the least load:

+

Send via local fax server.

+

Send via fax server NYSERVER2 (or NYSERVER).

Because each rule is weighted the same, RightFax load balances between the two servers.

Scenario 8: Backup servers

PDQ Company's system administrator for LASERVER hears about the new NYSERVER2 in New York and decides to make use of the additional server by replicating all the dialing rules on LASERVER for NYSERVER but this time referring them to NYSERVER2. This leads to a guaranteed path of Least-Cost Routing if one or the other of the N.Y. servers fail for any reason.

Upon hearing about the new NYSERVER2 in New York, PDQ Company's system administrator for LASERVER replicates all the dialing rules on LASERVER for NYSERVER but this time referring them to NYSERVER2. This leads to a guaranteed path of Least-Cost Routing should one or the other of the New York servers fail for any reason.

Chapter 22: Creating phonebook entries in FaxUtil Web

To sign in

1. Open `http://<servername>/RightFax/User` or `https://<servername>/RightFax/User` where `servername` is either the name of the RightFax server or its IP address.
2. In the **User ID** box, enter an administrator password. If required, enter the **Password**, and then click **Sign In**.

To sign out

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

Creating a personal RightFax phonebook

Your RightFax phonebook can include entries for individual fax recipients and groups of fax recipients.

To open your RightFax phonebook

- From your fax mailbox, click **Phonebook**. The **Phonebook** page opens.

To create an individual entry

1. On the **Phonebook** page, on the **New** menu, click **Phonebook Entry**. The **Phonebook Entry** dialog box opens.

The screenshot shows a 'Phonebook Entry' dialog box with the following fields and options:

- ID**: Text input field.
- To**: Name, text input field.
- Destination type**: Dropdown menu with 'Fax' selected.
- Destination**: Text input field.
- Company**: Text input field.
- Address**: Text input field.
- City/State**: Text input field.
- Options**:
 - Published
 - Read only
 - Hidden on cover sheet CC list
- Accounting**:
 - Account, text input field.
 - Matter, text input field.
- Other**: Text input field.

Buttons: **Ok** and **Cancel**.


2. In the **ID** box, type an ID for the entry.
3. Under **To**, enter addressing information for the recipient.
4. Under **Options**, select any of the following check boxes:

- **Published.** If selected, the entry will be available to other RightFax users. If your RightFax account is not password-protected, unpublished entries from your phonebook will be accessible to other users.
 - **Read only.** If selected, only you can edit the entry.
 - **Hidden on cover sheet CC list.** If selected, the item will not appear in the CC list on the cover sheet.
5. Under **Accounting**, enter billing codes to assign to all faxes sent to this recipient.
 6. Under **Other**, enter optional contact information, such as a secondary fax number, voice numbers, and the recipient's fax ID. In the **Notes** box, enter notes about the recipient.
 7. Click **Ok**. The new entry appears in your phonebook list.

To create a group entry

A group phonebook entry can consist of both individual and group entries.

1. On the **Phonebook** page, on the **New** menu, click **Phonebook Group**. The **Phonebook Group** dialog box opens.

2. In the **ID** box, type an ID for the group.
3. Under **Available users and groups**, select the users and groups to include in the group. To search for a user or group, in the search box, enter a full or partial user or group ID.
4. Click **Add**. The users and groups are added to the **Current group members** list. To remove an entry from the list, select the entry, and then click .
5. Select any of the following check boxes to specify who can view and edit this group phonebook entry.
 - **Published.** If selected, the entry will be available to other RightFax users. If your RightFax account is not password-protected, unpublished entries from your phonebook will be accessible to other users.
 - **Read only.** If selected, only you can edit the entry.
6. Click **Ok**. The group appears in your phonebook list.

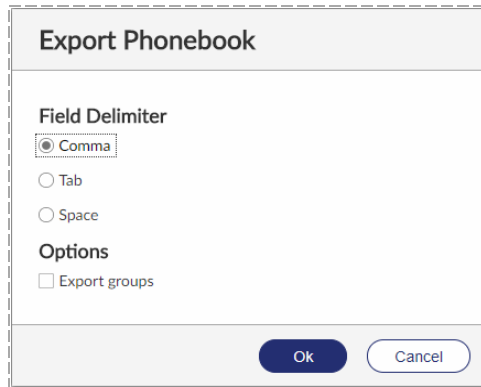
To print phonebook entries

Exporting phonebook entries

You can export your RightFax phonebook to a text file.

To export the phonebook

1. In your fax mailbox, click **Phonebook**. The **Phonebook** page opens.
2. On the **File** menu, click **Export**. The **Export Phonebook** dialog box opens.



The screenshot shows a dialog box titled "Export Phonebook". It contains two sections: "Field Delimiter" and "Options". In the "Field Delimiter" section, there are three radio buttons: "Comma" (which is selected), "Tab", and "Space". In the "Options" section, there is a checkbox labeled "Export groups" which is currently unchecked. At the bottom of the dialog, there are two buttons: "Ok" and "Cancel".

3. Under **Field Delimiter**, select the delimiter to use to separate fields within phonebook entries, **Comma**, **Tab**, or **Space**.
4. To include phonebook groups as separate entries in the file, select the **Export groups** check box. The text file shows groups at the bottom of the file, and the IDs of the users in each group are listed.
5. Click **Ok**.

Chapter 23: Managing phonebooks in FaxUtil

Depending on your user account configuration and access, you can store fax recipient information in a RightFax phonebook and link to existing ODBC, LDAP, or MAPI contact lists.

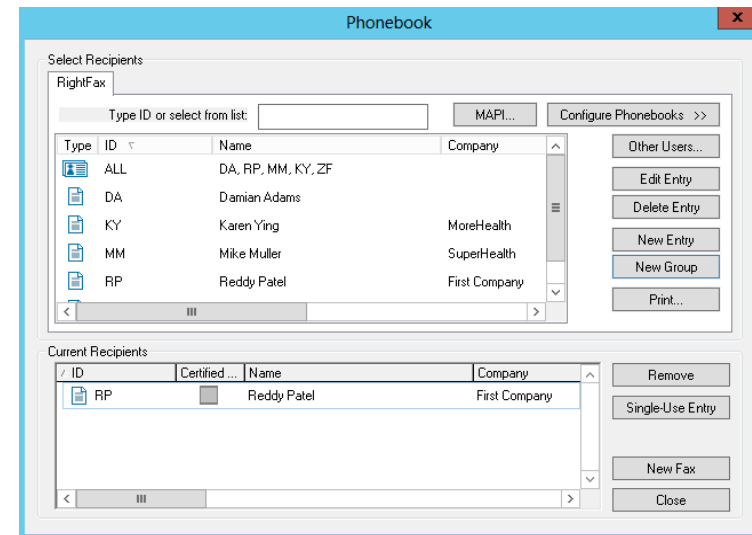
Creating a personal RightFax phonebook

Your RightFax phonebook can include entries for individual fax recipients and groups of fax recipients. When you add or edit an entry, you can select any of the following to specify who can view and edit the entry:

- **Published.** The entry will be available to other RightFax users.
- **Read Only.** Only you can edit the entry.
- **Externally available.** The entry will be available to applications other than RightFax software.
- **Hidden on cover sheet CC list.** The information for individual entries will not appear in the CC list on the cover sheet.

To open your RightFax phonebook

- From your mailbox, click **Phonebook**. The Phonebook window opens.



Creating RightFax phonebook entries

To create or edit an individual entry

1. In the **Phonebook** window, do one of the following:
 - Click **New Entry**.
 - Click the entry in the list, and then click **Edit Entry**.

2. In the **ID** box, type an ID for the entry.
3. Under **Address**, enter addressing information for the recipient; at a minimum, enter a name and a fax number.
4. Under **Other**, enter optional contact information, such as a secondary fax number, voice numbers, and the recipient's fax id.
5. Under **Options**, select any of the following check boxes:
 - **Published**. If selected, other RightFax users can view the item.
 - **Read Only**. If selected, only the owner can modify the item.
 - **Externally available**. If selected, the item is available to applications other than RightFax software.
 - **Hidden on cover sheet CC list**. If selected, the item does not appear in the CC list on the cover sheet.
6. Under **Billing Information**, enter billing codes and notes you want to assign to all faxes sent to this recipient.

7. Click **OK**. The new entry appears as an individual entry in your phonebook list.

To create or edit a group entry

A group phonebook entry can consist of both individual and group entries.



1. In the **Phonebook** window, do one of the following:
 - Click **New Group**.
 - Click the group in the list, and then click **Edit Entry**.
2. In the **ID** and **Type name or select from list** boxes, enter an ID and a description for the group.
3. Select any of the following check boxes to specify who can view and edit this group phonebook entry.
 - **Published**. If selected, other RightFax users can view this phonebook item.
 - **Read Only**. If selected, only the owner can modify this phonebook item.
 - **Externally available**. If selected, this phonebook item is available to applications other than RightFax software.
4. In the box on the left, select all individual and group items you want to add to the group, and then click the right arrow to move them to the **Group Members** box.
5. Click **OK**. The group appears in your phonebook list.

Importing phonebook entries

To load another user's public phonebook entries

1. In the **Phonebook** window, click **Other Users**.
2. In the **Search for Users** box, enter a full or partial user name or a RightFax user ID, and then click **Search**.

3. Select the user, and then click **Load**. Any public entries from this user's phonebook appear in your RightFax phonebook list.

 indicates if a user account is disabled,  if it is unprotected.

4. Repeat to load public phonebook entries from another user.

To import entries from a text file

If your user account permission allows creating and editing phonebooks, you can import entries into your personal phonebook from a specially formatted text file.

- To create the import file, see [Creating a text file to import below](#).
- To import the file, see [Importing entries from a text file on the next page](#).

Deleting RightFax phonebook entries

To delete an entry

1. In the **Phonebook** window, in the list, click the entry.
2. Click **Delete Entry**, and then click **Yes** to confirm the deletion.

Printing RightFax phonebook entries

To print all or select phonebook entries:

1. Click **Phonebook**.
2. To print all entries in the phonebook, click **Print**. Otherwise select the entries in the list, and then click **Print Selected**.
3. Select the printer and specify any other print settings, and then click **Print**.

Creating a text file to import

The import file can be generated by an external source such as a contact database manager, exported from another RightFax phonebook, or generated by the RightFax PhnPrint administrative utility. For information about PhnPrint, see the *RightFax Administrative Utilities Guide*.

The file to import must be a comma-, tab-, or space-delimited ASCII text file where:

- The first line is made up of the RightFax field names shown in the table below. When exporting from an existing source, map each field name to the corresponding RightFax name.
- Each phonebook record is separated from the next by a line break.
- Each field is separated from the next by a comma, tab, or space, depending on the selected format.
- The field values in each record appear in the same order as the corresponding field names on the first line.
- Each blank field value appears as a single space surrounded by quotation marks (" ").
- If quotation marks are used to surround any field name or field value, they must be used for all fields in the file.

The following table lists each of the valid phonebook entry fields.

| Field name | Max length | Description |
|------------|------------|--|
| ID | 17 | A unique ID used only to reference the phonebook entry. It never appears on the fax. |
| Name | 59 | The recipient's name as it will appear on the fax cover sheet. |
| Company | 59 | The recipient's company name as it will appear on the fax cover sheet. |

| Field name | Max length | Description |
|------------|------------|--|
| Address | 59 | The recipient's address as it will appear on the fax cover sheet. |
| CityState | 59 | The recipient's city and state as they will appear on the fax cover sheet. |
| Fax1 | 31 | The recipient's primary fax number. This is used when dialing the fax destination and may appear on the fax cover sheet. |
| Fax2 | 31 | The recipient's alternate fax number. This is used when dialing the fax destination and may appear on the fax cover sheet. |
| Voice1 | 31 | The recipient's primary voice number as it will appear on the fax cover sheet. |
| Voice2 | 31 | The recipient's alternate voice number as it will appear on the fax cover sheet. |
| FaxID | | The recipient's fax ID. |
| BillCode1 | 17 | A code associated with the recipient used for billing or tracking purposes. It never appears on the fax. |
| BillCode2 | 17 | An additional code associated with the recipient used for billing or tracking purposes. It never appears on the fax. |
| Notes | 128 | Any additional information about the recipient. This will not appear on the fax and is for your information only. |

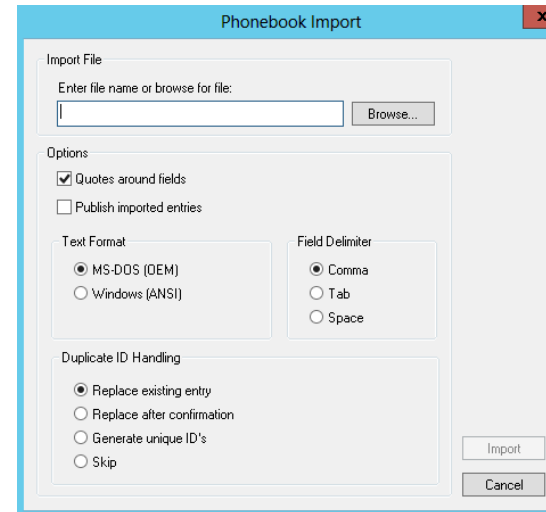
Example The following shows the first three lines and first three fields of an import file. Instead of (...), a usable import file would include all field names listed in the table and field values for each. For an example of a blank field value, see the value for Company in the second record.

```
"ID", "Name", "Company", (...)  
"Jan", "Jan Smith", "First Company", (...)  
"Reddy", "Reddy Patel", " ", (...)
```

Importing entries from a text file

To import entries from a text file

1. On the **Tools** menu, click **Phonebook Import**.



2. Enter the path and file name of the text file to import, or browse to it.
3. As needed, select the **Quotes around field** check box to specify that the entries in the import file include quotes and the **Publish imported entries** check box to make the imported phonebook entries available to other user.
4. Under **Text Format**, click the format of the import file.
5. Under **Field Delimiter**, click whether the fields within the import file are separated by comma, tab, or space.
6. Under **Duplicate ID Handling**, specify the action to take when a duplicate ID is encountered:
 - To import the entry and replace the existing entry, click **Replace the existing entry**.

- To import the entry and replace the existing entry if confirmed during import, click **Replace after confirmation**.
 - To import the entry and assign a unique ID, click **Generate unique IDs**.
 - To not import the entry, click **Skip**.
7. Click **Import** . As needed, respond to confirmation messages for duplicate entries.

Exporting the entries from your RightFax phonebook

You can export phonebook entries to a comma, tab, or space delimited text file.

To export the phonebook to a comma, tab, or space delimited text file

1. On the **Tools** menu, click **Phonebook Export**.
2. To include phonebook groups as separate entries in the file, select the **Export Groups** check box. The text file shows groups at the bottom of the file, listing the IDs of the users in each group.
3. Click the delimiter to use to separate fields within phonebook entries: **Comma**, **Tab**, or **Space**.

Selecting MAPI, LDAP, or ODBC phonebook entries

You can select entries from phonebooks other than the RightFax phonebook only if you have user permission to create and edit phonebooks. For information about configuring MAPI, LDAP, and ODBC phonebooks, see the *RightFax Administrator Guide*.

To select recipients from a MAPI source

1. Click **Phonebook**, and then click **MAPI**.
2. In the **Profile Name** box, select the MAPI profile name, and then click **OK**.
3. If prompted, enter your network user name, domain, and password, and then click **OK**.
4. In the contact list, double-click each contact entry you want to select, and then click **OK**. You can search for recipients by name only or by data in other columns.

The selected entries appear in the **Current Recipients** list of the Phonebook window.

To select recipients from an ODBC or LDAP phonebook

1. Click **Phonebook**.
2. On the tab of the phonebook, select the entries, and then click **OK**. Use the arrow keys to show more records.

Chapter 24: Setting up workflows

Workflows can be configured for handling faxes among different users or groups in an organization. For example, faxed invoices may be handled by several departments in an organization, such as the Sales department and then the Accounts Payable department.

Metadata helps describe an item and can be many kinds of information such as a location, a date, or an invoice number. Each sent and received fax is associated with a set of RightFax-specific metadata. With workflows, custom metadata fields can be configured for received faxes so that users in a workflow can associate faxes with additional descriptive information.

A workflow can capture unlimited metadata.

For example, faxed invoices may route to a workflow that is configured for RightFax Archive. In FaxUtil, the faxes appear in the workflow mailbox of all assigned users. These users collaborate to tag the faxed invoices with the required metadata. After a fax is tagged with metadata, it is removed from the workflow mailbox. When archiving occurs, the completed faxes move to RightFax Archive.

In the RightFax client applications, if a user is responsible for tagging faxes in a workflow, then a workflow mailbox appears in the tree view in the left pane of the RightFax client application.

Metadata only can be added to received faxes. If a user opens a fax to tag it with metadata, the fax is locked so that other users cannot open it.

Preparing to configure workflows for metadata tagging

Before you begin configuring workflows, prepare the following information.

- Identify the types of received faxes that will be tagged with metadata. For example, invoices and orders.
- For each type of received fax, create a list of the metadata that you wish to capture. For example, order date and ship date.
- Determine which users or groups of users should add metadata to faxes.
- Determine the workflow and the ultimate destination of the fax. For example,
 - Workflow step 1: Faxes are received in a central mailbox where a user evaluates each fax for appropriate action. One of the faxes is an order for the Sales department, so the user routes the fax to the Sales department to verify that the order is complete.
 - Workflow step 2: From the Sales department, the fax is routed to the Accounts Receivable department to initiate the invoice.
 - Workflow step 3: From the Accounts Receivable department, the fax is routed the fax to RightFax Archive.

- Identify exceptions to the workflows so that users can divert faxes from workflows. For example, if a Sales order is received with the incorrect price for goods sold, the order can be diverted in order to correct the price. Identify the steps in the exception workflows.
- For each type of received fax, determine the routing code that will route faxes to a workflow. For information about routing codes, see the *RightFax Administrator Guide*.
- To retrieve the metadata after the faxes have been tagged, you must license and configure RightFax XML Generator or RightFax Vault. For information, see the *RightFax XML Generator Administrator Guide* or the *RightFax Vault Administrator Guide*. Metadata for each fax in a workflow can be viewed in FaxUtil or FaxUtil Web.

Creating, editing, and deleting workflows for metadata tagging

To create new workflows, complete the following general steps:

1. Ensure that you have permission to create workflows. Only users with user account permission can create workflows. Administrators cannot create workflows unless they have user account permission. See [Creating RightFax user accounts on page 23](#).
2. Create exception workflows. Workflows can include subordinate workflows for handling exceptions (known as "exception workflows"). Exception workflows allow users to divert faxes from a workflow and then return them to the original workflow. You must create exception workflows before you create workflows.
3. Create the workflows.
4. After you create workflows, assign RightFax users to the

workflows. See the *RightFax Administrator Guide* to define delivery methods for users.

To create a workflow

- In Web Admin, in the left pane, click **Workflows**. The list of workflows appears in the right pane. Click **New**. You have the following options:
 - To create a workflow, click **New workflow**, see [Configuring the properties of a workflow on page 151](#).
 - To create an exception workflow, click **New exception workflow**, and see [Configuring the properties of an exception workflow below](#).

To delete a workflow

- Select the workflow in the list, and then click **Delete**.

Configuring the properties of an exception workflow

After you create exception workflows, they can be added to workflows, as described in [Configuring the properties of a workflow on page 151](#).

In the **New Exception Workflow** dialog box, click the tab you want to edit.

The General tab

1. In the **ID** box, enter the name of the exception workflow.
2. In the **Description** box, enter a description of the exception workflow.
3. In the **Responsible groups or users** box, select the users and groups that will be responsible for tagging faxes in the exception workflow with metadata. The responsible user of one workflow can edit the data from any previous workflow through which the fax has flowed.
4. Under **Metadata**, click **New**. The **New Metadata** dialog box opens.

5. In the **Name** box, enter a descriptive name for the metadata field. This name will appear in the fax viewer as a prompt for users who are tagging faxes with metadata.
6. Under **Type**, select one of the following:
 - To allow users to enter free form text, click **User entry**. If you wish to specify a default value, in the **Default** box enter the value. The user can change this text during data entry.

Use the following options to refine the text that users can enter as metadata.

Letters Allow the user to enter text in the metadata.

Numbers Allow the user to enter numbers in the metadata.

Symbols Allow the user to enter symbols in the metadata. Symbols include basic punctuation.

Spaces Allow the user to enter spaces in the metadata.

Check spelling During data entry, the system will check the spelling of the text that the user enters for metadata.

- To provide multiple choices, you can create up to five options from which users can select. Click **Multiple choice**. In the **Choices** box, enter the text for the first choice. Subsequent text boxes will appear after each entry. If you wish to select one of these as the default value, under **Default** click the selection.

Multiple choice entries will appear in the fax viewer in the order they are created.
 - To prompt users to enter a date, click **Date**.
7. If the metadata is required, select the **Required** check box.

The Actions tab

- The **Completion Action** determines the disposition of the fax when metadata tagging is completed. The fax will be re-submitted to the workflow that had the exception.
- Under **Removal Action**, select one of the following actions:
 - **Disabled**. The user cannot remove the fax from the workflow.
 - **Submit to another workflow**. The fax will be routed to another workflow. Under **Workflow**, select the name. If you wish to create a new workflow for this, click **New**.
 - **Route to RightFax user**. The fax will be routed to another RightFax user. Under **User ID**, select the user ID. (Note that if this user is deleted at a later time, the removal action will change to None.)

When a fax is removed from a workflow, the metadata for the current workflow is not saved.

The Time Limit tab

1. To set a time limit to complete each fax in the exception workflow, under **Completion Time Limit**, select the number of days or hours. The completion time is calculated from the time the fax arrives in the workflow.
2. Reminder and warning notifications can be set for faxes in the exception workflow. The time remaining for the reminder is calculated from the completion time (the time remaining before the workflow deadline). Select the check box **Send reminder (time remaining)** or **Send warning (time remaining)**, and then select the days, hours, or minutes before the completion time when the reminder or warning should be sent to the user.

A reminder or warning is sent once for each fax.

- Under **Notify this user**, select the RightFax user who will receive the reminder or warning.
- Configure the email or SMS service for the selected users who will receive notifications. See [Creating RightFax user accounts on page 23](#).

Configuring the properties of a workflow

In the **New Workflow** dialog box, click the tab you want to edit.

The General tab

- In the **ID** box, enter the name of the workflow.
- In the **Description** box, enter a description of the workflow.

- In the **Responsible groups or users** box, select the users and groups that will be responsible for tagging faxes in the workflow with metadata. The responsible user of one workflow can edit the data from any previous workflow through which the fax has flowed.
- Under **Metadata**, click **New**. The **New Metadata** dialog box opens.
- In the **Name** box, enter a descriptive name for the metadata field. This name will appear in the fax viewer as a prompt for users who are tagging faxes with metadata.
- Under **Type**, select one of the following:
 - To allow users to enter free form text, click **User entry**. If you wish to specify a default value, in the **Default** box enter the value. The user can change this text during data entry.

Use the following options to refine the text that users can enter as metadata.

Letters Allow the user to enter text in the metadata.

Numbers Allow the user to enter numbers in the metadata.

Symbols Allow the user to enter symbols in the metadata. Symbols include basic punctuation.

Spaces Allow the user to enter spaces in the metadata.

Check spelling Check the spelling of the text that the user enters for metadata.

- To provide multiple choices, you can create up to five options from which users can select. Click **Multiple choice**. In the **Choices** box, enter the text for the first choice. Subsequent text boxes will appear after each entry. If you wish to select one of these as the default value, under **Default** click the selection.

Multiple choice entries will appear in the fax viewer in the order they are created.

- To prompt users to enter a date, click **Date**.

7. If the metadata is required, select the **Required** check box.

The Actions tab

- The completion action determines the disposition of the fax when metadata tagging is completed. Under **Completion Action**, select one of the following:
 - **None**. The fax will be removed from the list of faxes that require metadata, and it will be aged or archived according to the configuration of the workflow mailbox.
 - **Submit to another workflow**. The fax will be routed to another workflow. Under **Workflow**, select the name. Exception workflows are not available for completion actions. If you wish to create a new workflow for this, click **New**.
 - **Allow responsible users to select another workflow**. Users in the workflow can choose another workflow for the fax. Under

Workflows, select up to four workflows. Exception workflows are not available for completion actions.

- **Route to RightFax user**. The fax will be routed to another RightFax user. Under **User ID**, select the user ID. (Note that if this user is deleted at a later time, the completion action will change to None.)
- Exception workflows allow users to divert faxes from a workflow and then return them to the original workflow. To provide this method, under **Exception Action**, select one of the following:
 - **Disabled**. The user cannot remove the fax from the workflow.
 - **Submit to an exception workflow**. The fax will be routed to another workflow. Under **Workflow**, select the name. If you wish to create a new workflow for this, click **New**.
- To provide a method for a user to remove a fax from the workflow, under **Removal Action**, select one of the following:
 - **Disabled**. The user cannot remove the fax from the workflow.
 - **Submit to another workflow**. The fax will be routed to another workflow. Under **Workflow**, select the name. Exception workflows are not available for removal actions. If you wish to create a new workflow for this, click **New**.
 - **Route to RightFax user**. The fax will be routed to another RightFax user. Under **User ID**, select the user ID. (Note that if this user is deleted at a later time, the removal action will be disabled.)

When a fax is removed from a workflow, the metadata for the current workflow is not saved.

The Time Limit tab

1. To set a time limit to complete each fax in the workflow, under **Completion Time Limit**, select the number of days or hours. The completion time is calculated from the time the fax arrives in the workflow.
2. Reminder and warning notifications can be set for faxes in the workflow. The time remaining for the reminder is calculated from the completion time (the time remaining before the workflow deadline). Select the check box **Send reminder (time remaining)** or **Send warning (time remaining)**, and then select the days, hours, or minutes before the completion time when the reminder or warning should be sent to the user.

A reminder or warning is sent once for each fax.

3. Under **Notify this user**, select the RightFax user who will receive the reminder or warning.
4. Configure the email or SMS service for the selected users who will receive notifications. See [Creating RightFax user accounts on page 23](#).

Managing workflows

The RightFax administrator can ensure that faxes in workflows are being processed in a timely manner.

To view the status of a workflow

1. In Web Admin, in the left pane, click **Workflows**. The list of workflows appears in the right pane.
2. Click **Status**. The status dialog box appears.
 - **Waiting**. The number of faxes in the workflow that are waiting to be viewed since they entered the workflow. Shows the number of faxes waiting, the average time waiting, and the longest time a fax has waited to be viewed.
 - **Processing**. The number of faxes in the workflow that are open in the fax viewer.
 - **Total**. The total number of faxes that are waiting and in processing in the workflow, the average total time in the workflow, and the longest time a fax has existed in the workflow.

To view the workflow in FaxUtil Web, select the workflow and click **Open in FaxUtil Web**. FaxUtil Web opens with the workflow folder open.

To view the faxes in a workflow in the client applications

1. In FaxUtil or FaxUtil Web, log in as the administrator or workflow mailbox user. The list of workflows appears in the left pane.
2. Click the workflow, and all of the faxes in the workflow appear in the fax list in the right pane. This includes available, unavailable, and completed workflow faxes. If a fax is locked by another RightFax user, then the user ID appears in the **Availability** column. If the administrator opens a fax that has not been completed (the "complete workflow" action is pending), then the user will see a message that the fax is in use by an administrator.

If a fax is unavailable, then a RightFax administrator can make it available. On the **Fax** menu, click **Make Available**.

Chapter 25: Configuring the Remoting Service for web applications

Web client applications such as FaxUtil Web and Web Admin connect to the RightFax server using the Remoting Service.

Configuring the RightFax Remoting Service

To configure RightFax Remoting

1. In Web Admin, in the left pane, click **System**.
2. In the right pane, click **Configuration**, and then click **Remoting**. The **RightFax Remoting** dialog box opens.

Default fax server

This is the fax server you specified when you installed the web applications.

Users can reset forgotten passwords

With RightFax basic authentication, if passwords are used to sign in to RightFax web applications, and users should be able to reset their passwords, then select the **Users can reset forgotten passwords** check box. This setting only applies to users with RightFax basic authentication.

Users must have email addresses in their RightFax user accounts. When resetting a password, the user must provide their RightFax user ID or the email address associated with it.

Password reset email sender address

When a user resets their password, an email will be sent to the user's email address that contains a link to a page where the user can save a new password. Enter the email address from which this email will be sent.

SMTP Connection

In the **SMTP Connection** box, select the SMTP connection through which emails will be sent. If the SMTP connection is not listed, click **New**, and see [Configuring an SMTP connection for basic authentication on page 120](#).

Log level

In the **Log level** list, click the level of logging.

- **Critical** records events of critical importance. Typically this includes unexpected events such as a service interruption.

- **Normal** records events of normal importance, such as scheduling a document.
- **Verbose** records more details of events of normal importance.

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.

- **Diagnostic** records events that are useful for tracking and resolving problems.

Chapter 26: Configuring faxing for the Epic Print Service

If your RightFax system will send faxes that are submitted by a system from Epic Systems Corporation via the Epic Print Service, enter the Epic authentication credentials in RightFax.

This option only is available if you have licensed the RightFax Integration Module.

To enter Epic system authentication credentials

1. In Web Admin, in the left pane, click **System**.
2. In the right pane, click **Integrations**, and then click **Configure Epic Authentication**.
3. In the **Configure Epic Authentication** dialog box, enter the user name, password, and client ID for the Epic system.

Chapter 27: Configuring faxing from Allscripts

Faxing from Allscripts Systems TouchWorks EHR and Professional EHR only is available if you have licensed the RightFax Integration Module.

To enter Allscripts authentication credentials

1. In Web Admin, in the left pane, click **System**.
2. In the right pane, click **Integrations**, and then click **Configure Allscripts**.
3. In the **Configure Allscripts** dialog box, enter the Allscripts Unity web service endpoint URL, the Unity application name, user name, and password.
4. In the **EHR username** and **EHR password** boxes, enter the user name and password for the electronic health record (EHR) application from which documents will be faxed.
5. Click **OK**.

To send a fax from Allscripts

1. Click **Send with RightFax**, and the RightFax web application opens in the browser.
2. Log in with the credentials provided by your system administrator. The list of documents appears in the right pane.
3. In the right pane, select the documents to fax.

4. In the left pane, in the **Fax number** field, enter the fax number. You can enter the number with or without hyphens, parentheses, or spaces.

To use post-dialing, enter an ampersand (&) followed by a sequence of DTMF digits. The post-dial string can include PSTN telephony characters such as 0-9, #, *, and a comma, but not p, t, w, and !. The digits will be dialed as soon as the SR140 receives a SIP 183 or SIP 200 response code or a H323 message from the gateway.

5. In the **Name** box, enter the name of the recipient.
6. To include a coversheet, select the **Include coversheet** check box, and select the coversheet in the list.
7. In the **Cover sheet notes** box, type the text that should appear on the coversheet of the fax. You can enter 21 lines of text.
8. Do one of the following:
 - To send the selected faxes, click **Send**.
 - To clear the entries, click **Clear**.

Chapter 28: Installing a TLS/SSL certificate

You can install digital code signing certificates on the IIS server for secure sessions via HTTPS.

You have the following options for installing and uploading a certificate.

- Create a self-signed certificate.
- Use a certificate from a third-party certificate authority. The certificate must be X.509 format, base-64 encoded.
- Use a private certificate authority.

To create a self-signed certificate

1. In Web Admin, in the left pane, click **System**.
2. In the right pane, click **TLS/SSL Certificate**.
3. Under **Self-Signed Certificate**, click **Create**. The **Create Self-Signed Certificate** dialog box opens.
4. In the **Common name** box, enter the unique, fully qualified domain name of the IIS server.
5. Enter the identifying organizational information in the **Organization**, **Organizational unit**, **City/Locality**, **State/Province**, and **Country/Region** boxes, and then click **Ok**.
6. After the certificate is created, under **Security**, click **Change**. In

the **Change Security** dialog box, select the certificate, and then select the **Use TLS/SSL** check box.

To use a certificate from a third-party certificate authority

1. In Web Admin, in the left pane, click **System**.
2. In the right pane, click **TLS/SSL Certificate**.
3. Under **Signing Request**, click **Create**. The **Create Signing Request** dialog box opens.
4. In the **Common name** box, enter the unique, fully qualified domain name of the IIS server.
5. Enter the identifying organizational information in the **Organization**, **Organizational unit**, **City/Locality**, **State/Province**, and **Country/Region** boxes, and then click **Ok**.
6. When you receive the third-party certificate, under **Certificate**, click **Upload**.
7. In the **Upload Certificate** dialog box, click **File name**, and select the third-party certificate. Select **Upload signed response**, and then click **Ok**.
8. Under **Security**, click **Change**. In the **Change Security** dialog box, select the certificate, and then select the **Use TLS/SSL** check box.

To use a private certificate authority

1. First, install the organization's root certificate on client computers.
2. In Web Admin, in the left pane, click **System**.
3. In the right pane, click **TLS/SSL Certificate**.
4. Under **Certificate**, click **Upload**. In the **Upload Certificate** dialog box, select **Upload root certificate**.
5. Click **File name**, and select the trusted root certificate, and then click **Ok**.
6. Second, create your signed response certificate. Under **Signing Request**, click **Create**. The **Create Signing Request** dialog box opens.
7. In the **Common name** box, enter the unique, fully qualified domain name of the IIS server.
8. Enter the identifying organizational information in the **Organization**, **Organizational unit**, **City/Locality**, **State/Province**, and **Country/Region** boxes, and then click **Ok**.
9. Third, after the certificate is prepared by your private certificate authority, install the signed response certificate on the IIS server. Under **Certificate**, click **Upload**. In the **Upload Certificate** dialog box, click **File name**, and select the signed response certificate.
10. Select **Upload signed response**, and then click **Ok**.
11. Under **Security**, click **Change**. In the **Change Security** dialog box, select the root certificate, and then select the **Use TLS/SSL** check box.