

RightFAX 6.0

User's Guide

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Introduction to RightFAX

In this chapter:

- Welcome to RightFAX!
- How RightFAX Works
- RightFAX Components
- Installing RightFAX
- Using This Guide and Other Learning Tools
- Technical Support

Welcome to RightFAX!

Thank you for choosing RightFAX professional fax server software. You are now in command of a suite of superior tools for faxing directly from your desktop computer, saving your organization time, money, and manpower. Daily routines of waiting for an open fax machine, manually dialing numbers, feeding and unjamming pages, waiting for fax confirmation, and constantly replacing rolls or reams of paper are behind you!

With RightFAX, you will be able to easily:

- Create, send, and receive faxes
- View incoming and outgoing faxes
- Track the status of a fax and review its history
- Forward faxes to your home, hotel, or to another network user
- Send urgent faxes quickly by assigning priority
- Import signatures, logos, clipart and other images using a scanner
- Use billing codes to manage client information
- Import hundreds of personal and group phonebook entries
- Broadcast faxes to large numbers of recipients

How RightFAX Works

Your computer is linked to others in your organization via a network. The computers that control the network, known as servers, run RightFAX.

With RightFAX, you can fax a document created in almost any application simply by printing it to a special "fax printer." The fax printer, which appears as a normal printer on your network or a port on your local computer, automatically redirects your fax to the RightFAX server. A dialog pops up requesting the recipient's name, fax number, and other key information. RightFAX then converts your document into a format that can be sent to other fax machines. As the document is converted, RightFAX uses the information you entered to create a cover sheet. The fax is then sent out. And RightFAX can periodically notify you about the status of your fax.

Receiving faxes with RightFAX is even easier than sending. Because you can be assigned your own routing code, your faxes are sent directly to your computer's fax mailbox (called FaxUtil). The fax server periodically notifies you that you have received a new fax. You can view your faxes right on your computer screen, print them, organize them in folders, and even (with RightFAX's optional Optical Character Recognition module) convert them back into text for editing!

RightFAX performs most fax processing and conversions at the server, so your workstation (called the "client") remains free to let you do your work.

RightFAX Components

RightFAX consists of several distinct modules including FaxUtil, Enterprise Fax Manager, and Fax Reporter. As a RightFAX client, you will primarily use RightFAX's FaxUtil module to create, send, receive, and manage faxes. Enterprise Fax Manager is RightFAX's administrative module from which each RightFAX user is managed. Fax Reporter lets you analyze and track faxes, users, groups, and other database information on the RightFAX server.

If you use a Windows 3.x or Windows for Workgroups workstation, your administrator will install and configure the RightFAX PowerBar. The PowerBar can include up to 40 frequently used network printers, fax printers, and application icons. You can fax, print, and launch programs simply by clicking on the desired PowerBar icon. Leave the PowerBar on your desktop so you can easily access it from any application.

If you have a Windows 95 or Windows NT client, your administrator will install and configure the RightFAX Client applet in your Control Panel. In addition, the RightFAX tray icon will be installed in the corner of your taskbar. Both the RightFAX Client applet and the RightFAX tray icon are discussed in detail in Chapter 3, [Creating and Sending Faxes](#).

The RightFAX Fax Reporter utility lets you access and analyze fax statistics in order to create reports. RightFAX Reporter also lets you save data sets as Microsoft Access (.MDB) files and export fax reports to other file formats including HTML, Word, Excel, ASCII, RTF, and e-mail through MAPI/Exchange. RightFAX Reporter can be run from any Windows NT 4.0 or Windows 95 workstation, and does not require other RightFAX client software be installed. You must be granted permission by the RightFAX administrator to use RightFAX Reporter, and you must be able to provide a valid user ID and password.



RightFAX Client

RightFAX Client icon in the Control Panel



RightFAX tray icon on the Windows 95/NT taskbar

Installing RightFAX

Before you can use RightFAX to create, send, receive, and manage your faxes, the RightFAX client software must be completely and correctly installed on your computer by your organization's RightFAX administrator. Installing RightFAX on client computers is described in Chapter 7 of the [RightFAX Administrator's Guide](#).

Using This Guide and Other Learning Tools

The [RightFAX User's Guide](#) is designed for use by RightFAX clients whose main concern on a day to day basis will be creating, sending, and receiving faxes. However, RightFAX also includes several useful utilities that are accessible by RightFAX clients who have been granted sufficient access rights by the RightFAX administrator. Instructions on using these utilities are included in this guide. Instructions on how to grant access rights to clients are found in the [RightFAX Administrator's Guide](#).

This guide assumes that you have a basic working knowledge of your computer and the conventions used in most software applications for your workstation type. Instructions and examples for Windows 3.x, Windows for Workgroups, Windows NT, and Windows 95 are included in most cases. Please follow only the instructions specific to your operating system type.

In addition to this User's Guide, RightFAX provides several additional sources for information on getting the most out of your RightFAX software:

RightFAX Administrator's Guide

The [RightFAX Administrator's Guide](#) contains detailed instructions on installing and configuring RightFAX for both the server and the client workstations. This guide is specifically designed for RightFAX administrators and includes the technical information necessary to manage the RightFAX fax server.

RightFAX Optional Modules Guide

The RightFAX Optional Modules Guide is included when you purchase RightFAX Enterprise Suite or any one or more of the optional RightFAX modules (which can be purchased separately). This guide provides information on installing, using, managing, and integrating the following utilities with your RightFAX software:

- RightFAX E-mail Gateway
- RightFAX Web Client
- RightFAX Docs on Demand
- RightFAX TeleConnect
- Optical Character Recognition (OCR)
- PostScript/PDF Conversion

Please contact RightFAX's Sales department at (520) 320-7000 for more information on using or purchasing these or any of RightFAX's powerful, fully integrated utilities.

RightFAX Fax Board Guide

The RightFAX Fax Board Guide provides installation, testing, and configuration instructions for all supported fax hardware.

Quick Reference Card

Keep this card close to your computer for quick and easy access to all the most common FaxUtil functions and features.

Online Help

RightFAX's Online Help is a convenient and easy-to-use source of assistance. You can access the Online Help by selecting the Help menu in any FaxUtil or Enterprise Fax Manager window. Online help lets you scan for help by topic, or search for key words and terms.

RightFAX Training

Count on RightFAX's classroom training to enhance your RightFAX product knowledge. Technical, administrative, and user training programs provide you with the tools to optimize your RightFAX solution, and provide you with the knowledge to fully utilize RightFAX in your environment. Customized training is also available to meet your organization's specific needs. Classes are held throughout the year at the RightFAX corporate office in Tucson, Arizona. You may also choose the convenience of RightFAX training at your own location. For more information on RightFAX training classes and schedules, please visit our website at www.rightfax.com.

Technical Support

Your Customer Support Guide (enclosed in the product box) includes detailed information about the support options available to RightFAX customers. Please fill out the *RightFAX Software Warranty & Registration Card* and return it immediately. If you have questions of a technical nature, please contact your organization's RightFAX administrator or network administrator before calling our technical support department.

RightFAX Technical Support

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FaxUtil Overview

In this chapter:

- What is FaxUtil?
- Starting FaxUtil
- Using Your Fax Mailbox
- Sorting Faxes
- Selecting Faxes
- Deleting Faxes
- Activating Commands
- Command List
- Setting Your Preferences
- Switching Mailboxes
- Administrative Mode

What is FaxUtil?

FaxUtil, RightFAX's user interface, serves as the central mailbox from which you can send, receive, view, edit, and manage your faxes.

Installing FaxUtil

Instructions for installing the RightFAX client software are provided in the [RightFAX Administrator's Guide](#).



FaxUtil icon

Starting FaxUtil

Your RightFAX administrator must assign a user ID and password (if required) for your account before you can start FaxUtil. The procedures for starting FaxUtil will vary based on your client type.



PowerBar

Windows 3.x and Windows for Workgroups clients

FaxUtil can be started by double-clicking on the FaxUtil icon in the Program Manager window. If your administrator has installed the RightFAX PowerBar, you may simply click once on the FaxUtil icon in the PowerBar to start the application.

Windows NT 4.0 clients



RightFAX tray icon

FaxUtil can be started by selecting FaxUtil from the **Programs** menu under the **Start** menu. You can also select FaxUtil from the RightFAX tray icon menu in the corner of your taskbar.

Windows NT 3.51 clients

FaxUtil is also compatible with Windows NT 3.51 workstations. The Print-to-Fax Driver is not incorporated into the tray icon as it is in Windows NT 4.0 because NT 3.51 does not support tray icons. Instead, the Print-to-Fax Driver remains minimized on the desktop, awaiting fax operations.

Windows 95 clients

FaxUtil can be started by selecting FaxUtil from the **Programs** menu under the **Start** menu. You can also click on the RightFAX tray icon in the corner of your taskbar to start FaxUtil.

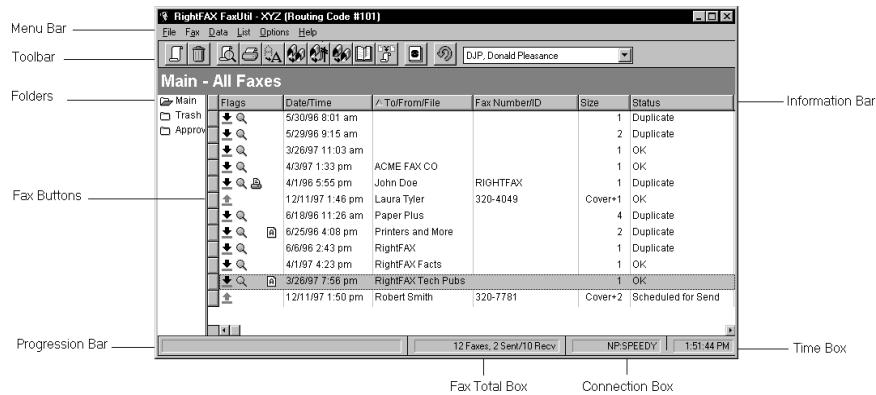
Initial "From Information" Prompt

This feature, which will appear only once, serves as a reminder to complete the sender information on the fax cover sheet. The first time you log into FaxUtil, the **Cover Sheet Information** dialog will appear over the fax mailbox list. Information entered in this dialog will automatically be entered on the cover sheet of each fax sent. You are not required to enter any information and can bypass this dialog simply by clicking OK. Default cover sheet information can be edited at a later time by selecting **Cover Sheet Information** from the **Options** menu.

Using Your Fax Mailbox

The appearance of the FaxUtil mailbox varies slightly depending on your operating system and/or version of RightFAX. In general, the same functions and commands are available, but they may be activated in different ways. By way of example, we describe the Windows FaxUtil in detail.

In Windows, the sections of the FaxUtil mailbox are:



Menu Bar

The menu bar contains pull-down lists of commands that you can use in FaxUtil.

Toolbar

The buttons in this toolbar represent shortcuts for several FaxUtil tasks. For example, you can create a new fax by clicking once on the **New** button instead of choosing the **New** option from the **Fax** menu. If you rest the mouse pointer on a toolbar button for a few seconds, Tooltips, describing the function of the button, will appear. The function of these buttons are discussed in greater detail in "Using the Toolbar" later in this chapter.

Folders

Your fax mailbox can be organized into different folders, which you can create and delete as needed. More information about folders is provided in "Setting Your Preferences" later in this chapter.

Fax Buttons

Each fax is displayed on a separate line. You can select a fax by clicking on the button to the left of the fax; this will highlight it across the entire line. The top left corner of the fax list contains the Select/Deselect All button which will highlight or unhighlight all the faxes in the list at one time.

Progression Bar

This bar displays information about the status of any processes performed by RightFAX.

Network/Group Users

This box only appears to the right of your toolbar if your administrator has assigned full, group, or alternate administrator privileges to your account. The drop-down list gives you access to either all the users on your network or all the users in your group, depending on the type of permissions assigned.

Information Bar

The information bar provides useful information about the faxes in your mailbox. It is discussed in greater detail in “Using the Information Bar” later in this chapter.

Time Box

The time box indicates the current time for the user.

Connection Box

This box displays the type of network connection and the name of the fax server in use.

Fax Total Box

This box contains the number of faxes/entries currently displayed in your mailbox. This will vary depending on the list-type you have selected in the **List** menu.

Using the Information Bar

Following are the sections of the FaxUtil information bar.

Flags

At the left of the information bar is a column containing several icons. The icons indicate whether a fax was sent or received, viewed, printed, contains annotations, and/or has had OCR or binary file transfer output.

Date/Time Indicator

The second column indicates the date and time a fax was created or when it was received.

To/From/File Column

This column displays the remote recipient of a sent fax or the remote sender of a received fax. The “to” and “from” names are taken from the cover sheet information. The “from” name will not appear unless the cover sheet information is manually completed for the received fax after it arrives (see “Assign From Info,” Chapter 5, [Viewing and Annotating Faxes](#)). If your fax is actually a binary file, the file name will appear here.

Fax Number/ID Column

This column contains one of two possible values: a fax number or a remote fax ID. The fax number is the fax telephone number to which a fax was sent. The remote fax ID is the CSID (caller subscriber identification) and refers to the origin of a received fax. This value is often the fax number or company name of the sender.

Size

The size column indicates the number of pages that were transmitted or received by fax, or the size of a file if you sent or received a binary file. It is important to note that there is a difference in the display of sent and received faxes. Page counts for sent faxes may include the cover sheet and will appear as “Cover+number-of-pages.” If only a cover sheet is sent, this column will contain “Cover only.” You may send a fax without a cover sheet, in which case the size column will only show “number-of-pages.” There is no way to distinguish whether or not a received fax has a cover sheet. Consequently, for received faxes, the size column simply displays the total number of pages received.

Status

The status column indicates the current status of the fax in the RightFAX system. This status is periodically updated by the system. To learn how to manually request an update and how to change the frequency of updates, see "Updates" later in this chapter. A complete list of possible fax status messages are listed in [Appendix A](#).

Billing Code 1 and 2

These two columns display the billing code(s) associated with each fax. (These fields may have been renamed by your administrator to reflect the needs of your organization.) This information is obtained from data entered in the billing codes fields in the **Fax Information** dialog or from the <Billinfo1:> and <Billinfo2:> embedded codes.

Unique ID

RightFAX generates a unique number to associate with every fax that is sent or received. This column displays that number for identification purposes.

Sorting Faxes

You can sort faxes in your mailbox by selecting **Sort** from the **List** menu and then choosing the column heading by which you wish to sort your faxes. The column heading used for the sort will display a triangle indicator to the left of the column name. If the triangle is pointing up, it indicates that the sort is in ascending order. If the triangle is pointing down, it indicates that the sort is in descending order.

You can also use a shortcut to sort faxes quickly. Just double-click the left mouse button anywhere in a column heading to toggle between ascending and descending sort order.

FaxUtil will "remember" the way the faxes were sorted when you exit it and return to this order the next time you open your mailbox.

Selecting Faxes

To work with a fax, you must select or highlight it from the list of faxes in your mailbox.

Selecting a Single Fax

Click on the fax button to the left of the desired fax or use the up and down arrows to move to the fax and press [Space] to highlight it. Deselect the fax by clicking on the fax button again.

Selecting Multiple Faxes

To select a continuous group, click and hold down the left mouse button while dragging the mouse pointer down the fax buttons (to the left of the faxes). If the desired faxes are not in a continuous group, merely click on each fax button. Deselect the faxes by clicking on the fax buttons again. The top left corner of the fax list contains the Select/Deselect All button which will highlight or unhighlight all the faxes in the list at one time.

Deleting Faxes



Delete button on toolbar

To delete a fax, select it as described above, then press the Delete key on the keyboard, select **Delete** from the **Fax** menu, or click on the **Delete** button in the toolbar. FaxUtil will ask for confirmation to protect against accidental deletion. Both sent and received faxes may be deleted, however, some restrictions may apply depending on your system's requirements.

If your system requires completion of received fax information, you may not delete an incomplete received fax. The status column of such faxes will read "Info Not Complete." If your system does not require this completion, the received fax is automatically considered to be complete and can be deleted.

If you forward a fax to another user on your network, deleting the fax from your mailbox DOES NOT affect the other user's copy.

There is no restriction on deleting incomplete outgoing faxes. You can delete sent faxes with the status "Info Not Complete" or "In Conversion." However, deleting a fax that is in the process of sending, or is scheduled to be sent will cancel the send. It should be noted that if the send process is far enough along, the delete operation may be too late to stop it and will have no effect.

Activating Commands

There are several different ways to activate commands in FaxUtil:

- Use the mouse to activate functions from menus and command buttons on the toolbar
- Enter commands from the keyboard
- Activate some commands with a combination of keystrokes and mouse movements

More instructions for using the mouse, keyboard, menus, and toolbar are described in the next few sections. For a list of common and alternative methods for activating commands, see “Command List” later in this chapter.

Using the Mouse

You can use the mouse to open menus and select commands, open and close faxes, and choose buttons on the toolbar. Mouse instructions are to be completed using the left mouse button, unless otherwise noted.

Using the Menus

A bar of pull-down menus appears at the top of the FaxUtil mailbox. Select the menu title to pull down the list of options, then choose an item to activate it.

Using the Toolbar

The toolbar consists of a series of buttons aligned horizontally across the top of the FaxUtil mailbox. These buttons represent shortcuts to common tasks. You can select a button by single-clicking on it with the mouse.

With the left mouse button:

- Single-click on the RightFAX tray icon to open the menu
- Double-click on a received fax to open it
- Double-click on a column heading to sort
- Click on a button on the toolbar to activate it.

With the right mouse button:

- Click on the RightFAX tray icon to open the menu
- Click on the title bar of the Power-Bar to configure it
- Click on a document and select Send To > Fax Destination via RightFAX to fax it.

Using the Keyboard

You can activate many FaxUtil features using the keyboard.

- **Keyboard Equivalents.** To open a menu, press the [Alt] key plus the underlined letter in the title of that menu. Choose an item from the menu by pressing the underlined letter in the command. For example, to pull down the **File** menu, press [Alt+F], then choose the **Edit** option by pressing [E].
- **Arrows.** To select a menu item, press [Alt], then use the arrow keys to highlight the item and press [Enter]. Press [Esc] to close the menu and [Esc] again to exit the menu bar.
- **Hot Keys.** You can activate some commands by pressing the key listed to the right of an option on its menu. For example, to create a new fax, press the [Insert] key instead of selecting **New** from the **Fax** menu or the **New** button on the toolbar.

Select, open, and delete faxes with the cursor, [Enter], and [Delete] keys, respectively. Standard Windows keyboard options are also available. For example, [Alt+Tab] switches between open windows.

Command List

This section provides a list of commands and their corresponding functions. Each command can be activated in several ways. As described earlier, you can choose a button from the toolbar, choose from a pull-down menu, or press a combination of keys on the keyboard to activate these commands.

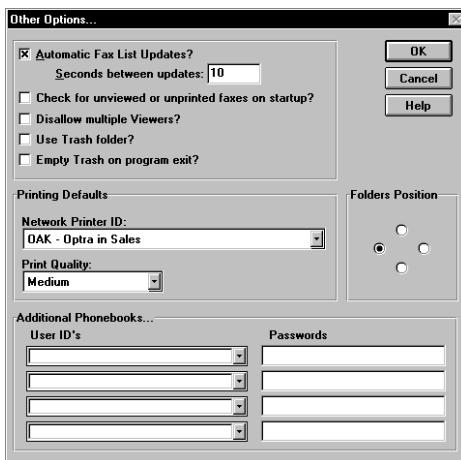
<u>Command</u>	<u>Button</u>	<u>Menu</u>	<u>Key</u>	<u>Function</u>
About Fax Utility FaxUtil		Help		Displays the version number and release date of FaxUtil
Administrative Mode		List		Displays all faxes for all users in group or universally (requires administrative privileges)
Approve Fax		File		Marks a fax as approved and allows it to be scheduled for sending
Change Password		Options		Changes the user's password
Choose Font		Options		Specifies the font, size, and style for mailbox display
Combine		Fax		Combines two or more faxes into one fax
Configure Scanner		Options		Sets up a scanner
Contact Information		Help		Displays custom information for your system as defined by your system administrator
Contents		Help		Displays the contents of the FaxUtil Help windows
Cover Sheet Information		Options		Sets the default values included on every sent fax's cover sheet
Create New Folder		File		Creates a new folder in the folder list
Delete		File	Delete	Deletes the selected fax
Delete Folder		File		Deletes the selected folder
Disapprove Fax		File		Marks a fax as disapproved and prevents it from being sent
Edit		File	Enter	Edits cover sheet information
Embedded Codes		Help		Describes all embedded codes
Empty Trash		File		Deletes all faxes stored in the Trash folder
Errors		Help		Describes fax transmission error and status messages
Exit		File	F3	Exits the FaxUtil application

<u>Command</u>	<u>Button</u>	<u>Menu</u>	<u>Key</u>	<u>Function</u>
Export		Data		Saves OCR or BFT output to local or network directory
Forward to Fax Machine		File		Forwards a copy of the selected fax to a new fax number
Forward to Network User		File		Forwards a copy of the selected fax to one or more users on the network
Full Fax List		List		Displays all faxes in your mailbox
In-process Fax List		List		Displays only the faxes which have not been completed or are in the process of sending
Kick		File		Updates "Scheduled for Send" faxes; immediately retries "error-retry" faxes; tries "error-dropped" faxes once more
Launch		Data		Starts the application with which a binary file transfer is associated and opens the BFT file
Move to Folder		File		Moves selected faxes to the specified folder
Needing Approval		List		Displays only the faxes which are awaiting approval
New		Data		Creates a new binary file transfer from a file created in another application
New		Fax	Insert	Creates a blank cover sheet ready to be sent on its own or combined with a scanned image and/or a library document
New Fax List		List		Displays unviewed or unprinted faxes in your mailbox
Notification		Options		Sets notification preferences.
OCR		Fax		Converts faxes from graphics to editable text files (optional module, purchased separately)
Other		Options		Specifies mailbox setup preferences
Phonebook		List		Displays Phonebook entries
Print		Fax		Prints the fax to a network printer
Print		Data		Starts the application with which the BFT is associated and prints the file

<u>Command</u>	<u>Button</u>	<u>Menu</u>	<u>Key</u>	<u>Function</u>
Received Fax List		List		Displays only the received faxes in your mailbox
Received Fax Options		Options		Specifies preferences for faxes as they are received
Record Thermal Fax		Fax		Records faxes sent and received through thermal fax machines for tracking/billing purposes
Refuse Fax Distributions		Options		Prevents faxes from being automatically distributed to your mailbox via Smart-Fax Distribution
Release		File		Releases and sends a selected fax that has been held for previewing before sending
Rename folder		File		Allows you to rename the selected folder
Return to Original Mailbox		List		Returns you from another user's to your own mailbox
Route to Network User		File	Ctrl+R	Routes the selected fax to another network user
Send Fax Options		Options		Specifies preferences for sent faxes
Sent Fax List		List		Displays your outbound faxes
Show History		File		Displays a detailed history of the selected fax, including whether it was sent or received, printed, OCR'ed, forwarded, routed, or encountered errors
Sort		List		Sorts faxes according to selected column
Split		Fax		Splits received faxes into separate documents.
Store as Form		Fax		Stores the selected fax as a form in the RightFAX system (must have privileges to add/edit forms)
Store in Library		Fax		Stores the selected fax in the library of frequently faxed documents (must have privileges to add/edit library docs)
Switch Mailboxes		List		Switches from your mailbox to another user's mailbox
Update List		List	ESC	Refreshes mailbox information
View Body		Fax		Displays the body of the selected fax in the Fax Viewer
View Cover Sheet	Fax			Displays the cover sheet of the selected fax in the Fax Viewer (valid only for outbound faxes with a cover sheet)

Setting Your Preferences

There are several features in RightFAX that you can customize to meet your needs. Before you start sending and receiving faxes, set the frequency of updates and notification, printing and sorting default and the tasks to perform on startup.



Fax List Updating

Because the information in your FaxUtil mailbox is merely a “snapshot” of information stored on the fax server, it is necessary to update the information periodically, especially when tasks are being performed.

Automatic Updates

It is impractical for the server to send constant updates to your FaxUtil because of the potentially heavy work load. Instead, by default, the status of your faxes is only refreshed every 60 seconds. If you want your mailbox updated more or less frequently, you can adjust the automatic update period to a minimum of 10 seconds and a maximum of 999 seconds. To change the update frequency, open the **Options** menu and select **Other**. Click in the **Automatic Fax List Updates** box and set the **Seconds between updates** field to the desired delay. You can also use this option to disable automatic updating, so that your mailbox is only updated when you delete and add faxes, when you press the **Update** button in the toolbar, or when you first start FaxUtil.

Manual Updates

If you want to update your mailbox without waiting for the automatic update, or if you have automatic updating disabled, you can update it manually. You can manually update by selecting the **Update** button from the toolbar or selecting **Update List** from the **List** menu.



Update button in toolbar

Check for Unviewed/Unprinted Faxes on Startup

To receive notification of new and unviewed/unprinted faxes in your fax mailbox each time you start FaxUtil, go to the **Options** menu and select **Other**. Click in the **Check for Unviewed/Unprinted Faxes on Startup** box.

Disallow Multiple Viewers

To disable the ability to open more than one fax viewer at a time, open the **Options** menu and select **Other**. Click in the **Disallow Multiple Viewers?** box.

Use Trash Folder/Empty Trash on Program Exit

To create a Trash Folder and automatically empty all faxes stored in that folder upon exiting FaxUtil, open the **Options** menu and select **Other**. Click in the **Use Trash Folder?** and **Empty Trash on program exit?** boxes.

Folders Position

Your fax mailbox can be organized into different folders, which you can create and delete as needed. To adjust the position of the folders in your FaxUtil window open the **Options** menu and select **Other**. Click the appropriate indicator to set the desired folder position.

Printing Defaults

To set the default printer, open the **Options** menu and select **Other**. In the **Network Printer ID** field select a printer from the drop-down box to display a list of all printers recognized by the network.

When setting the default printing resolution, it is important to take into account two things. First, RightFAX converts faxes in two modes: Normal: 100x200 DPI (dots per inch) and Fine: 200x200 DPI. You can change the image resolution on an individual basis each time you print. Second, different printers have different printing capabilities. Some print up to 300 DPI, while newer and faster ones may print at 600 DPI or more. Therefore, depending on your printer and your document, setting the default printing resolution at **High** or at **Low** may not give you the quality you need. Regardless of your printer or your document, you will get the best results at the fastest speeds if you use the **Medium** resolution, as it always falls within the acceptable range.

Additional Phonebooks

Create one group Phonebook that can be referenced by all the group members rather than entering the same entries in each user's Phonebook.

You can add the Phonebook entries of up to four users on your network to your Phonebook list. Use the drop-down list to specify the user ID. If you enter the user's password, you will have access to their private and published entries. If you do not enter a password, you can only access their published entries. The owner of individual or group phonebook entries can mark the entries as read-only to prevent modification by other users.

Notification

Your RightFAX administrator can configure the system to notify you of sent and received faxes, their status in the RightFAX system, and any errors encountered during transmission in a variety of ways. This feature allows you to work in other applications and still be aware of your fax mailbox activity.



To set notification preferences, open the **Options** menu and select the **Notification**. Select the desired notification (periodically, once, or never) when an outgoing fax needs more information, when a new fax arrives, or for your fax's status during transmission.

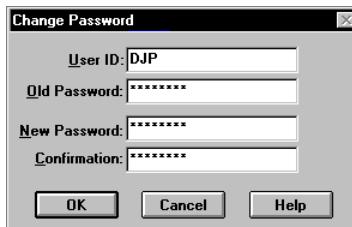
If you want notification of errors encountered during transmission, successfully sent faxes, or faxes abandoned because of errors, click in the appropriate boxes.

By clicking in the **Alternate Notification Active** box, you can reroute notifications so that another user will be notified of your incoming faxes when you're out of the office or on vacation. Use the drop-down list of users or type the user ID of an alternate. The alternate user will receive messages about your faxes according to your preferences as set above. This feature will not redirect messages about your outgoing faxes to the other user. Activating alternative notification DOES NOT give the alternate user access to your mailbox. If you wish the alternate user to view or have access to your fax mailbox, you must give them your user ID and password.

When alternate notification is enabled only the alternate user is notified.

Passwords

If your system requires a password, you should periodically change it. This is especially important if your fax materials are sensitive, proprietary, or classified. To change your password, go to the **Options** menu and select **Change Password**.



When the **Change Password** dialog box appears, enter your current password, then enter your new password. Enter your new password again in the **Confirmation** field to verify it. The new password will take effect the next time you open FaxUtil. To erase your password, enter your old password in the **Change Password** dialog and simply leave the **New Password** and **Confirmation** fields blank. If you forget your password, see your RightFAX administrator.

Switching Mailboxes

With RightFAX, you can view not only the contents of your own mailbox, but the mailboxes of other users on your network. (Only full, group, and alternate administrators can change mailboxes unless you know another user's password.) To change mailboxes, select **Switch Mailboxes** from the **List** menu. A dialog box will prompt you for a user ID and a password. After entering both press Enter or click OK. You will be able to work from this new mailbox just as you would your own. To return to your original mailbox, select **Return to Original Mailbox** from the **List** menu.

Users with administrative privileges will see a drop-down list of all users in the top right corner of their FaxUtil mailbox. Clicking on the arrow at the right of this box allows you to switch to another mailbox on your network.

Administrative Mode

Full administrators, group administrators, and alternate administrators may enable this function by selecting **Administrative Mode** from the **List** menu. This mode displays all faxes for all users (full administrators only) or all faxes of users in the group of which you are an administrator. Most of the list filters are available in this mode (e.g. all faxes, faxes needing approval, newly received faxes, etc.). This feature proves extremely useful for viewing large batches of faxes needing approval at one time.

There are three types of administrators: full, group, and alternate. A group or alternate group administrator can only change to mailboxes in the group to which they belong. A full administrator can change to ANY mailbox in the system.



Creating and Sending Faxes

In this chapter:

- Creating a Fax
- Sending a Fax
- Using Embedded Codes
- Diacritical Character Support
- Successful Transmissions
- Failed Transmissions
- Options for Sending
- Fax Approval System

Sending a fax with RightFAX is much easier than sending a fax by conventional fax machines. As described in Chapter 1, most of the process is automated. All you need is a document to fax and the fax number of the intended recipient.

Creating a Fax

There are two ways to create a fax. One way is to create a document in any application that can print to a network printer. This includes word processing, graphics, spreadsheet, and database programs. When you have finished creating the document, print it to the printer designated as the RightFAX Fax Printer. This is often HPFAX, PSFAX, or something similar. There are different ways to print to the fax printer and several ways to address and manipulate this document using embedded codes, the **Fax Information** dialog in FaxUtil, the popup print-to-fax driver or a combination of these methods. These options are discussed in greater detail below.



New button in toolbar

Windows 95 and Windows NT workstations can also select Quick Fax/Broadcast option in the RightFAX tray icon menu to create a new fax.

The other way to create a new fax is to press the **New** button on the toolbar or select the **New** option in the **Fax** menu of FaxUtil. The **Fax Information** dialog will create a cover sheet that can be sent by itself or can be combined with a scanned document and/or a document stored in the RightFAX library. Complete the necessary recipient information and press **OK** to send your fax. Your fax will be recorded in your fax mailbox.

Sending a Fax

There are three ways to send a fax using RightFAX:

- Using the **Fax Information** dialog in the FaxUtil mailbox or from the RightFAX tray icon (Quick Fax/Broadcast)
- Using the RightFAX print-to-fax drivers
- From within another application using embedded codes
- Using the **Send To** menu option (Windows 95 and Windows NT 4.0 only)

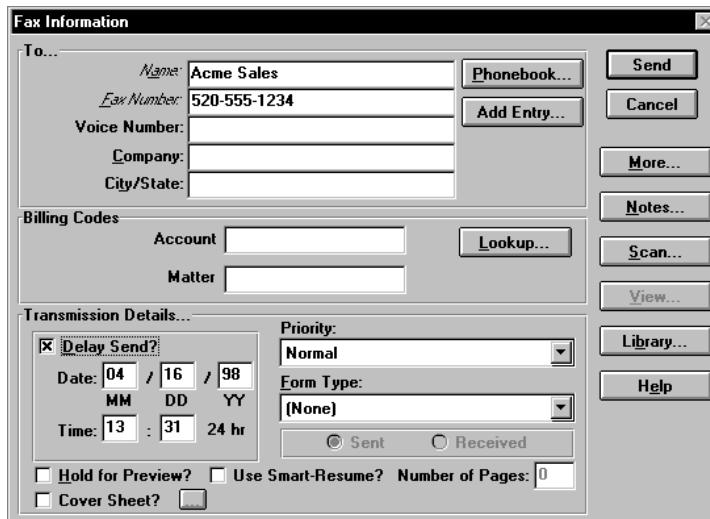
Each method is described in the following sections.

Using the Fax Information Dialog

The **Fax Information** dialog is perhaps the most powerful tool available to you in RightFAX. From it, you can create a cover sheet, address faxes, scan attachments, assign billing codes, attach library documents, and perform a host of optional features. By way of example, we describe the Windows features in detail.

To access the **Fax Information** dialog, you must either create a new fax by choosing **New** from the **Fax** menu (or clicking on the **New** button in the toolbar), or edit the fax you recently printed to the fax printer by double-clicking on it (or selecting **Edit** from the **File** menu). The only time that you can edit the information in the **Fax Information** dialog is when the fax status line reads "Info Not Complete."

Reminder!
Windows 95, Windows NT, Windows for Workgroups, and Windows 3.x clients should follow instructions for Windows clients, unless otherwise noted. Your FaxUtil dialogs may appear slightly different depending on your client workstation type.



The **Fax Information** dialog is divided into three sections. Often the only required fields are the name and number of the fax recipient, but your RightFAX administrator may have added more required fields to your cover sheet. If this is the case, your fax will not be sent and will remain in your mailbox with the status "Info Not Complete" until the required fields are completed.

Required fields are *italicized*.

To

Hyphens, parentheses, and spaces are acceptable when entering a destination fax number. You may also type the number without any spaces or separator characters

Enter the name, fax number, phone number, company, and address of the fax recipient. Verify with your RightFAX administrator whether you have to enter a "1" or "0" before long distance calls. However, you should only use hyphens or spaces to separate numbers. The **Phonebook** button and the **Add Entry** button are convenient for frequently used names and numbers. For more information, see Chapter 9, Phonebooks and Broadcast Faxing.

Billing Codes

Enter special codes, determined by your RightFAX administrator, such as client account and matter numbers. (These fields may have been renamed by your administrator to reflect the needs of your organization.) You can also use the **Lookup** button to view possible billing codes and their designations. You can search for billing codes by typing as many characters as you know in the field to be searched. Only one field can be searched at a time.

Transmission Details

Delay Send

To save money, use Delay Send to postpone transmission until after 11:00 PM when phone rates are usually lower

You can postpone the transmission of your fax to a later time or date. RightFAX normally sends outgoing faxes as soon as a phone line becomes available, but sometimes you may want to delay an outgoing fax to take advantage of off-peak phone rates or ensure that the recipient is available at the other end. If you wish to delay the fax, click in the **Delay Send** box, then specify the date and time.

Once you have completed the rest of the fields, RightFAX converts the document to fax format and holds it in your fax mailbox until the designated date and time with the status "Scheduled for Send."

Priority

Some fax boards do not support the priority feature of RightFAX

Specify the priority that is assigned to this fax within the queue of waiting faxes. Valid options (low, normal, and high) are listed in the drop-down box. If high priority does not appear as a choice, then your RightFAX administrator has not made it available to you.

Form Type

You can select a form that your administrator has entered into the RightFAX database to overlay or combine with your fax. For example, your company letterhead can be combined with your fax to present a professional image to the recipient. Click on the drop-down arrow to list all of the forms available.

Hold for Preview

If you want to look at the final version of your outgoing fax before you send it, click in the **Hold for Preview?** box. Your fax will remain in your mailbox with the status “Held for Preview.” You can view it with the Fax Viewer (see Chapter 5, Viewing and Annotating Faxes). This is a great way to see if your form overlaid correctly or to double-check which cover sheet you are using. To send your fax once you have previewed it, you **MUST** select **Release** from the **File** menu. The fax will then transmit as usual.

Cover Sheet

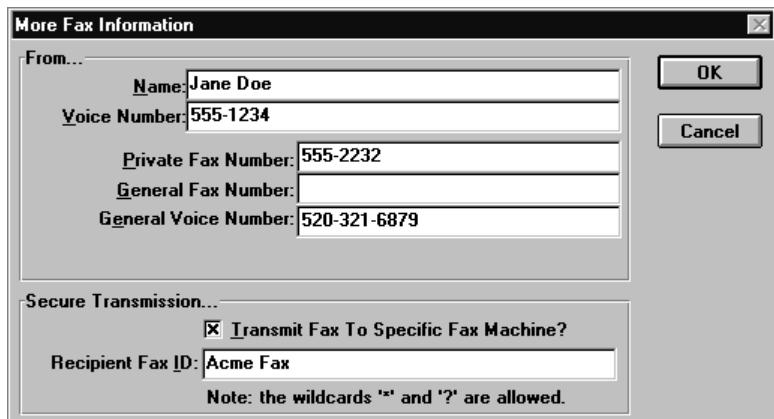
Your RightFAX administrator may require that you include a cover sheet with all your faxes. If a cover sheet is not required, you can choose to include one, by clicking in the **Cover sheet?** box. Whether you choose to include a cover page or not, all required information must be completed.

Smart-Resume

RightFAX incorporates technology that allows the fax server to intelligently resend only the portion of a fax which failed to be sent. For example, if you are sending a 50-page fax and the transmission is broken after 40 pages, normally all 50 pages would have to be resent. By enabling this feature, the server will only resend the last 10 pages. The server can also automatically add a page at the beginning of the retransmission which indicates that this is a continuation of a previous fax (must be configured by administrator). This feature can be configured on a per fax basis or can be set as the default in **Send Fax Options**.

More Button

The **More Fax Information** option serves two purposes. If you are editing an outgoing fax, you can change your sender contact information. This allows you to change the contact information for this fax only; it does not affect your default settings which you set in the **Cover Sheet Information** option of the **Options** menu. If you are editing a received fax, you can enter information about the person who sent the fax to you, so that their name will be displayed in the To/From/File column in the mailbox.



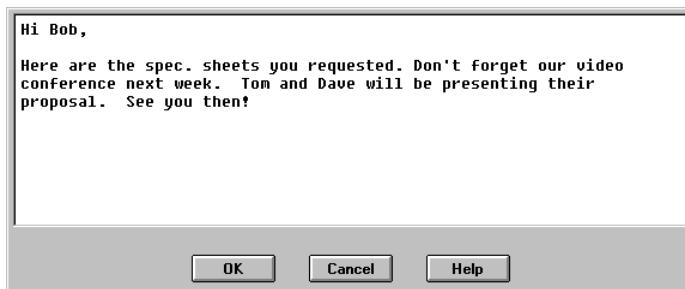
Secure Transmission

You can specify the remote fax ID of the intended recipient's fax machine or server. If you enable this feature, the fax will not be sent unless the remote ID matches the ID specified. You can use the asterisk (*) and question mark (?) wildcards if you are not sure of the exact ID. Asterisks represent zero or more characters or digits. Question marks represent exactly one digit or character each.

This feature was designed to ensure security for confidential faxes by making sure the intended recipient really is the recipient. Often fax numbers are outdated or are entered incorrectly by the user.

Notes Button

The **Notes** option allows you to add notes or comments to the fax cover sheet. The field accepts up to 21 lines of text, 69 characters per line. You can copy, cut, and paste; however, you cannot use embedded codes in this field.



Scan Button

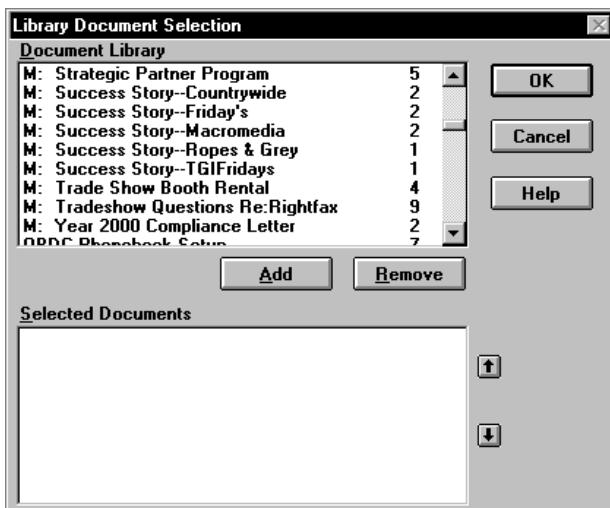
If your workstation is connected to a scanner, you can scan documents and attach them to cover sheets and/or faxes. For more information on scanning, see Chapter 8, [Managing Faxes and Attachments](#).

View Button

You can view the fax image with the RightFAX Fax Viewer by clicking on this button. This option only works if a fax image has already been generated. For more information, see Chapter 5, [Viewing and Annotating Faxes](#).

Library Button

The RightFAX library stores frequently-faxed documents for easy retrieval. Clicking on this button will display a list of all documents in the library.



Highlight the desired documents, click the **Add** button, and then click **OK**. The documents will be assembled into one fax, including any pages you have already created.

Using the PowerBar and Print-to-Fax Drivers

Windows 3.x and Windows for Workgroups

These clients can use the RightFAX PowerBar to send faxes quickly and easily. Before you print a document from its original application, simply switch from a network printer to the fax printer by clicking on its icon in the PowerBar. If you rest the mouse pointer on an icon for a few seconds, the name of the printer associated with that icon will popup. The small red triangle in the upper left corner of the icon will turn green indicating that it is the current default printer.



Printing the document from the original application will cause the **PopUp Fax Driver** dialog to appear. The PopUp Fax Driver is very similar to the Fax Information dialog in FaxUtil. You can complete all of the required fields here and the fax will be sent or you can choose to complete them later in FaxUtil. Either way, the fax will arrive in your FaxUtil mailbox.

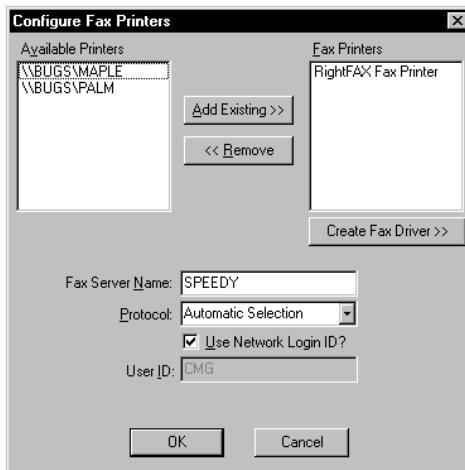


Using Right-Mouse Clicking

If you have Windows 95 or Windows NT 4.0 installed on your machine, you can fax a document by right-mouse clicking on the document, selecting **Send To > Fax Destination via RightFAX**, and completing the **Fax Information** dialog.

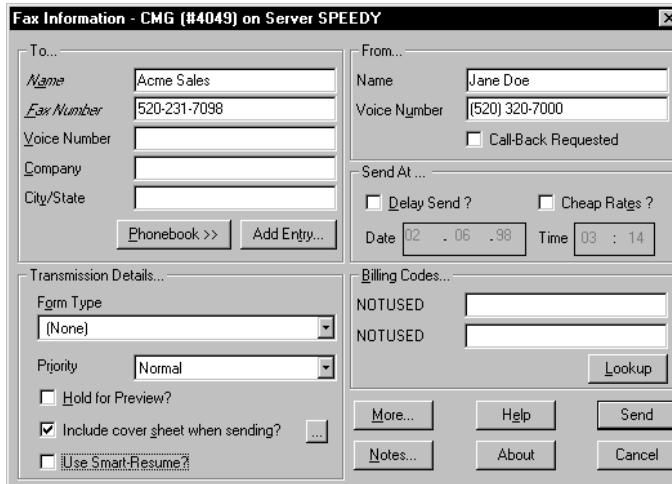
Windows 95 and Windows NT

Your RightFAX administrator has configured the RightFAX Client control panel on your machine so that the designated fax printer appears in the list of **Fax Printers** on the right as shown below.



Along with the Client Control Panel, Windows NT and Windows 95 clients also have the RightFAX tray icon installed in the corner of the taskbar. From this tray icon, you can launch FaxUtil, Enterprise Fax Manager, the Client control panel, and other RightFAX related functions. The tray icon plays an important part in sending faxes. Instead of using the PowerBar to switch to the fax printer, you can change to the fax printer on the fly by selecting it from the tray icon menu. Once the fax printer has been selected, you should print the document from its original application. Of course, in most Windows applications you can also simply select the fax printer in the application's **Print** dialog and then print the fax as usual.

Faxes printed to the fax printer will deploy the **PopUp Fax Driver** dialog, in which you can complete all of the required fields and send the fax immediately, or you can leave some blank and complete them later in FaxUtil. Either way, the fax will be recorded in your FaxUtil mailbox.



Quick Fax/Broadcast

This feature, accessible only from the RightFAX tray icon in Windows 95 and Windows NT taskbars, launches the PopUp Fax Driver to send a cover sheet with notes and/or library document attachments. This feature is especially handy for sending fax broadcasts in which you can automatically enter recipient information from Phonebooks and include fax bodies from documents stored in the RightFAX library.

Send To Menu

If you have a Windows NT 4.0 or Windows 95 workstation, you can send a document as a fax via the Send To menu. Simply right-mouse click on a document on the desktop or select Send To from the File menu of most Microsoft applications and choose to send to a fax address via RightFAX. This will launch the RightFAX addressing dialog and send your document to RightFAX for conversion to fax format. Note that the original document file must be one of the formats converted natively by RightFAX (i.e. MS Word, Excel, etc.). See [Appendix C](#) for a list of supported file formats.

Using Embedded Codes

Embedded codes are special faxing instructions that you insert into documents created in other applications. You can use embedded codes to include fax cover sheet information, attach library documents, add billing information, etc. Embedded codes let you to create and send faxes without using FaxUtil or the RightFAX PowerBar.

To add an embedded code to a document, type the code you want, along with any required parameters, between angle brackets. For example, an embedded code that tells RightFAX the destination fax number is written as:

<tofaxnum: 555-1212>

Because embedded codes only work in applications that treat characters as text (as opposed to graphics), some graphics programs will not accept embedded codes.

Tip: Create a style called RightFAX in your word processing application that uses a native printer font. This will make it easy to add embedded codes.

Embedded codes can be placed anywhere in the document that you will be faxing (top, middle, bottom), and can be used in any document that accepts text characters. Embedded codes work the same way regardless of your native application.

You must use only native printer fonts for embedded codes in your document (as opposed to True Type or Postscript fonts). RightFAX can create fax images of these other font types, but is not be able to "read" them as text. The entire embedded code must be in a native printer font, including the angle brackets.

Embedded codes cannot line wrap. If any embedded code statement is so long that it wraps to a second line, it will be ignored.

RightFAX removes all embedded codes from a document when it converts the document to fax form, so they don't appear in your final fax. If you type an embedded code incorrectly, it will be ignored by RightFAX and will be included in your fax. Embedded codes may be written in either upper or lower case.

The following is a complete list of embedded code keywords, descriptions, and their correct syntax:

ADDDOC

Examples:

```
<adddoc:x:\bin\xyz.tif>
<adddoc:\\server8\sys\bin\xyz.tif>
```

Tells RightFAX to add another file to the end of the fax. The specified file is not deleted after conversion. This additional file can be in one of over 45 of the most popular IBM and Macintosh native application file formats. If you have purchased the optional RightFAX PScript module, you can also attach PostScript and PDF files. See [Appendix C](#) for a complete list of supported formats. Be sure to specify the complete file path, including drive and directory and ensure that RightFAX has access privileges. More than one ADDDOC code can appear in the main document; the additional files will be appended in the order that they appear in the main document.

In the second example above, the file to attach is named with a UNC (Universal Naming Convention) specification. This is recommended instead of a drive letter, because the mapping or drive links may be different for the fax server versus the machine on which the fax output originates. For example, `\server8\sys\bin\xyz.tif` may appear to the user, Jane, when she is logged in as `H:\xyz.tif`. However, the fax server may not be able to find the file if it has a different mapping on its `H:` drive.

Maximum field length: N.A.

ADDDOC2

Examples:

```
<adddoc2:x:\bin\123.tif>
<adddoc2:\\server8\sys\bin\xyz.tif>
```

Tells RightFAX to replace the file with the specified file when preparing the fax. The specified file is deleted after conversion. This additional file can be in one of over 45 of the most popular IBM and Macintosh native application file formats. If you have purchased the optional RightFAX PScript module, you can also attach PostScript and PDF files.

Maximum field length: N.A.

ADDDOC3

Examples:

```
<adddoc3:x:\bin\xyz.tif>
<adddoc3:\server8\sys\bin\xyz.tif>
```

Tells RightFAX to add another file to the end of the fax. The specified file will be deleted after conversion. This additional file can be in one of over 45 of the most popular IBM and Macintosh native application file formats. If you have purchased the optional RightFAX PScript module, you can also attach PostScript and PDF files.

Maximum field length: N.A.

ADDDOC4

Examples:

```
<adddoc4:x:\bin\xyz.tif>
<adddoc4:\server8\sys\bin\xyz.tif>
```

Tells RightFAX to replace the output file with the specified file for conversion into a fax. The specified file is not deleted after conversion. This file can be in one of over 45 of the most popular IBM and Macintosh native application file formats. If you have purchased the optional RightFAX PScript module, you can also attach PostScript and PDF files.

Maximum field length: N.A.

ATDATE, AT_DATE

Examples:

```
<ATDate:9-15-96>
<at_date:+2>
```

Schedules the fax to be sent on a specific date. There are two different ways to express dates: relative or absolute. Relative dates give the number of days from today's date; for example, "+7" would be a week from today. Absolute dates are in the format: MM/DD/YY, MM-DD-YY, or MM-DD-YYYY. The absolute date format does not change for international countries.

ATDATE is often used in conjunction with ATTIME. If only a date is specified, i.e. no ATTIME is used, the time is assumed to be "now" (the current time of processing). For example, if a fax is sent to the queue at 3:30 p.m. and it contains <ATDATE:+1>, it will be scheduled for 3:30 p.m. tomorrow, not at midnight tomorrow.

Maximum field length: 10 characters

ATTIME, AT_TIME

Examples:

```
<AtTime:5:12p>
<at_time:+2>
```

Schedules the fax to be sent at a specific time. There are two ways to express the time value: relative and absolute. Relative time values are in the format '+#', i.e. <ATTIME:+1> schedules the fax for one hour from the time it is processed. An absolute time value is entered in either 12 or 24 hour format; a colon separating hours and minutes is optional. All the following are valid examples of absolute time values: <ATTIME:1722>
<ATTIME:0800><AtTime:8:00a><AT_TIME:10:00p><At_Time:0659p>. The fax server may not send the fax exactly at the minute specified. Rather, the fax becomes eligible for scheduling on an available outgoing fax line within 15 minutes of the time specified.

Scheduling a fax for a time between midnight and the current time will actually be scheduled on "today's" date, so the fax is immediately eligible for scheduling. You can use the ATDATE embedded code to change this. If, for example, you want to schedule the fax for 3 a.m. tomorrow morning, you need to use the codes: <ATDATE:+1><ATTIME:0300>.

Maximum field length: 9 characters

BILLINFO1, BI1

Examples:

```
<billinfo1:99999>
<bi1:99999>
```

Assigns a billing code to the fax. If your RightFAX administrator has set up the system to require billing codes, you must enter a valid billing code here or the fax will not be sent.

Maximum field length: 15 characters

BILLINFO2, BI2

Examples:

```
<billinfo2:87654-B>
<bi2:99999>
```

Assigns a second billing code to the fax if desired. If your RightFAX administrator has set up the system to require this field, you must enter a valid billing code here or the fax will not be sent.

Maximum field length: 15 characters

BREAK

Example:

```
<break>
```

This embedded code tells RightFAX to break a single the fax document into multiple faxes with multiple recipients. The break occurs at the point where the <BREAK> code is encountered. Each separate fax in the document must contain its own fax recipient information using the <TO_NAME> and <TO_FAXNUM> embedded codes.

When RightFAX encounters this embedded code, it automatically flushes any existing print formatting information that was contained in the file's print header. Because of this, the <BREAK> code should be used only within ASCII print stream files that do not have print headers associated with them (such as batch files, or files from mailframes)

Maximum field length: N.A.

BROADCAST

Example:

<broadcast>

Fine tunes the server for sending fax broadcasts. Including this embedded code in your fax eliminates unnecessary server processes, thereby increasing the speed at which a broadcast is sent. For example, using the **<BROADCAST>** code causes the server to increase the interval in which it polls for and returns status information (typically greater than 20 minutes). In addition, the server will not process requests for notification or automatic printing of sent faxes. However, the server will still automatically print failed faxes, if that option is selected.

Maximum field length: N.A.

CHANNEL

Example:

<channel:3>

Tells RightFAX to send this fax out on the specified channel on the fax board; 0 = any channel, 1 = first, 2 = second, etc. This code would be useful if your company uses one channel for priority faxing, and you want your fax to go out right away; with the **<CHANNEL>** code you can tell RightFAX to use that channel instead of the first available channel, which might take a while. You can also use this code for broadcasting. You can limit your broadcast to go out on only one channel, leaving the others free for single faxing.

In a broadcast, you can rotate amongst a set of channels for faster transmission.

Maximum field length: N.A.

COMPLETEEVENT, NOCOMPLETEEVENT

Examples:

```
<completeevent>
<nocompleteevent>
```

These codes are used to enable complete events which can be serviced from the RightFAX API. The new events are useful when writing code to feed back fax status to a database or host.

Maximum field length: N.A.

COVER

Example:

```
<cover>
```

This code may be invalid if your administrator has restricted your ability to change cover sheets.

Turns on automatic cover sheet generation *only* for the fax generated by the document containing this embedded code. This code is useful if the default setting is to send without cover sheets and you would like to send this particular fax with a cover sheet. The code temporarily overrides the default setting. Use FaxUtil to change the default permanently.

Maximum field length: N.A.

DELETE, AUTODELETE

Examples:

```
<delete>
<autodelete>
```

Specifies that the fax should be deleted from the fax mailbox after being sent *successfully*. This code overrides any default auto-delete setting.

Maximum field length: N.A.

DELETEALL, AUTODELETEALL

Examples:

```
<deleteall>
<autodeleteall>
```

Specifies that this fax should be deleted after being sent, whether or not the send was successful. This code overrides any default auto-delete setting.

Maximum field length: N.A.

DELETELASTPAGE

Example:

```
<deletelastpage>
```

Specifies that the last page of the fax contains embedded code information and should be removed.

Maximum field length: N.A.

FCSFILE

Example:

```
<FcsFile:MYCOVER1.PCL>
```

Instructs the fax server to use the file specified as the cover sheet. The cover sheet model specified must exist in the \RIGHTFAX\FCS directory on the server. If the FCSFILE code is not present in a document, the user's default will be selected automatically. If the user does not have a default cover sheet, the cover sheet of the group to which the user belongs will be selected. If the group does not have a cover sheet, then FCS.PCL will be used. The cover sheet model specified MUST always end with the .PCL extension. Only administrators can create cover sheets.

Maximum field length: 12 characters

FINE**Example:****<Fine>**

Tells the fax server to convert the body of this fax in Fine resolution (200 x 200 DPI) mode. Fine resolution is recommended for high quality and OCR documents. This code overrides the default mode set in FaxUtil.

Maximum field length: N.A.

FORMTYPE**Example:****<formtype:lthd>**

Causes the fax to be imaged onto a specific form or paper to give the effect that the document was printed on the form/paper and then faxed. Forms and paper-types must be setup by your system administrator.

Maximum field length: 15 characters

FROMFAXNUM, FROM_FAXNUM**Examples:****<FromFaxNum:520-555-1234>**
<from_faxnum:520-555-1234>

Specifies the sender's fax number. The data specified using this code is placed verbatim onto the fax cover sheet.

Maximum field length: 31 characters

FROMGENFAXNUM, FROM_GENFAXNUM**Examples:****<FromGenFaxNum:555-2000>**
<from_genfaxnum:520-555-1234>

Specifies the sender's company's fax number. The data specified using this code is placed verbatim onto the fax cover sheet.

Maximum field length: 31 characters

FROMGENPHONE, FROM_GENPHONE

Examples:

```
<FromGenPhone:602-555-1000>
<from_genphone:766-9889>
```

Specifies the sender's company's phone number. The data specified using this code is placed verbatim onto the fax cover sheet.

Maximum field length: 31 characters

FROMNAME, FROM_NAME

Examples:

```
<FromName:Fred Smith>
<from_name:John Doe>
```

Specifies the sender's name. The data specified using this code is placed verbatim onto the fax cover sheet.

Maximum field length: 59 characters

FROMPHONE, FROM_PHONE

Examples:

```
<FromPhone:555-1234>
<from_Phone:555-1234>
```

Specifies the sender's phone number. The data specified using this code is placed verbatim onto the fax cover sheet.

Maximum field length: 31 characters

IGNORE

Example:

```
<ignore>
```

Tells RightFAX to ignore all following embedded codes. This is useful for designing a sample document for other users.

Maximum field length: N.A.

LIBDOC

Example:

```
<libdoc:infopk1>
```

Instructs the fax server to send a library document instead of converting the printed output from the application into a fax. Any text from the document that contains this code is discarded. Multiple library documents may be named, or strung together, by including multiple codes, for example:

```
<LIBDOC:infopk1><LIBDOC:prices><LIBDOC:orderform>
<TO_NAME:John Doe><TO_FAXNUM:555-1234><COVER>
The quick brown fox jumped over the lazy dog.
```

These codes would cause the INFOPK1, PRICES, and ORDERFORM library documents to be assembled into a single fax, with a cover sheet, and sent to John Doe at 555-1234. The text “The quick brown fox...” would not appear on the fax, as the LIBDOC code causes it to be discarded. If you wanted to keep the text, you should use the LIBDOC2 code instead.

Maximum field length: 21 characters

LIBDOC2

Example:

```
<libdoc2:infopk1>
```

Instructs the fax server to send a library document in addition to converting the printed output from the application into a fax. The named library document is attached onto the end of the document containing the LIBDOC2 code. Multiple library documents may be named, or strung together, by including multiple codes, for example:

```
<LIBDOC2:infopk1> <LIBDOC2:prices>
<LIBDOC2:orderform> <TO_NAME:John Doe>
<to_faxnum:555-1234> <cover>
```

**John, here is the information you requested on
our new widget assembly. I've included the
current price list and an order form for your
convenience.**

These codes would cause the INFOPK1, PRICES, and ORDERFORM library documents to be assembled onto the end of the fax with the note to John. A cover sheet would automatically be added by the fax server because of the <COVER> code and the fax would be sent to John Doe at 555-1234. The LIBDOC2 code differs from the LIBDOC code in that the text “John, here is...” is not discarded.

Maximum field length: 21 characters

NEWDEST

Examples:

```
<to_name:John><to_faxnum:555-1234><newdest>
<to_name:Mary><to_faxnum:230-5000><newdest>
```

The <NEWDEST> code tells RightFAX that you want to send this fax document to multiple recipients. The <NEWDEST> code *must* appear after each and every destination, including the last one. Also, the <NEWDEST> code only allows certain codes to be repeated:

```
<TO_NAME:name>
<TO_FAXNUM:fax number>
<TO_CONTACTNUM:number>
<TO_COMPANY:company>
<TO_CITYSTATE:location>
<BILLINFO1:info>
<BILLINFO2:info>
```

If <NEWDEST> is not used, only the last occurrence of any given embedded code will take affect.

This code is not used to break one document into multiple faxes, but rather faxes one entire document to multiple recipients.

Maximum field length: N.A.

NEWLIB

Example:

```
<newlib:testlib,test_library>
```

This code allows library documents to be created and/or updated simply by printing to a network print queue. Substitute the desired library document ID in the *testlib* parameter and the library document description in the *test_library* parameter. This functionality works with PostScript and PCL-5 printer emulation. The newly created library document will automatically be assigned LAN accessibility only.

Maximum field length: N.A.

Any print job containing the <newlib> code will automatically remove the fax from a user's mailbox, after it is successfully converted into fax format and placed in the library database.

NEWLIB2

Example:

```
<newlib2:testlib,test_library,LFWC>
```

This code allows library documents to be created and/or updated simply by printing to a network print queue. In addition, you can assign accessibility attributes for each document. Substitute the desired library document ID in the *testlib* parameter and the library document description in the *test_library* parameter. This functionality works with PostScript and PCL-5 printer emulation. The newly created library document will automatically be assigned accessibility rights based on the following flags:

L = LAN; F = FOD; W = Web; C = Catalog

Maximum field length: N.A.

NOBODY

Example:

```
<nobody>
```

This code tells RightFAX to fax only the cover sheet, and not include a fax *body* document. Any codes in the document that are not used for the production of the cover sheet will be ignored.

Maximum field length: N.A.

NOCOVER

Example:

```
<nocover>
```

This code turns off automatic cover sheet generation *only* for the fax generated by the document containing this embedded code. Only the body of the fax will be sent.

Maximum field length: N.A.

The use of the <NOCOVER> command does not relieve the user of the responsibility for supplying the required fax information, such as the recipient's name and fax number.

NORMAL

Example:

<Normal>

This code tells the fax server to convert the body of this fax in Normal (200 x 100 DPI) mode. Normal works well for draft-quality resolution and shorter transmission times. It overrides the default mode set in FaxUtil.

Maximum field length: N.A.

NOSMARTRESUME

Example:

<nosmartresume

This code will disable the Smart-Resume feature for a particular fax. It requires no additional parameters.

Maximum field length: N.A.

NOTE

Example:

<Note:the quick brown fox jumps over the>
<Note:lazy dog>

This command is used to add comments to your cover sheet. You may use as many as 21 NOTE codes in a single document if you want to enter multi-line comments. The comments will not be reformatted by RightFAX.

Maximum field length: Up to 21 lines of NOTE codes can appear, each having up to 69 characters.

NOTIFY_OK

Example:

<notify_ok>

This code turns on notification upon successful sending of a particular fax. It requires no additional parameters.

Maximum field length: N.A.

NOTIFY_ERROR

Example:

```
<notify_error>
```

This command turns on notification upon too many unsuccessful send attempts (e.g. where the fax is abandoned) for a particular fax. It requires no additional parameters.

Maximum field length: N.A.

NOTIFY_RETRY

Example:

```
<notify_retry>
```

Turns on notification upon successful send attempt where fax will be retried for a particular fax. No additional parameters are required.

Maximum field length: N.A.

PREVIEW

Example:

```
<preview>
```

This command holds the fax for preview before sending it. You must use FaxUtil to view the fax and **Release** it when you are ready to send.

Maximum field length: N.A.

PRIORITY

Examples:

```
<priority:high>  <priority:h>
<priority:normal> <priority:n>
<priority:low>    <priority:l>
```

This code allows you to set the priority of the outgoing fax. Valid values are; Low (L), Normal (N), and High (H). Each user has a default priority which will be used if none is specified by an embedded code. Only users so designed by the administrator are able to use High priority. If you are not authorized to use High priority, and you include <priority:high> in a document, the fax will be forced to Normal priority.

Maximum field length: N.A.

RETRYCOUNT

Example:

```
<retrycount:3>
```

You can specify the number of times a particular fax will be retried after encountering certain error messages (e.g. fax number busy, human answered, etc.). This value will override the default setting for this fax only. A value of 0 tells the fax server to use the system defaults. A value of 1 tells the fax server to try only once, 2 tells it to try twice, etc.

Maximum field length: 2 digits

RETRYINTERVAL

Example:

```
<retryinterval:02>
```

You can specify the amount of time (in minutes) between retries for a particular fax. This value will override the default setting for this fax only.

Maximum field length: 2 digits

SAVE

Example:

`<save>`

This code specifies that this fax should NOT be deleted after being sent. It overrides any default auto-delete setting.

Maximum field length: N.A.

SIGNATURE

Example:

`<signature:BOB>`

RightFAX allows you to store scanned images of signatures in the system, and insert them into fax documents. The SIGNATURE code specifies which signature image to use. The signature will be inserted into the document at the location of the SIGNATURE embedded code statement; i.e. the signature image is placed on the page at the place where the code is found. Multiple signature codes per document are supported. You must be authorized to use a given signature, or the fax will be failed by the fax server.

Maximum field length: 21 characters

SMARTRESUME

Example:

`<smartresume>`

This code will enable the Smart-Resume feature for a particular fax. It requires no additional parameters.

Maximum field length: N.A.

TOCITYSTATE, TO_CITYSTATE**Examples:**

```
<ToCityState:Peoria, IL>
<to_CityState:Tucson, AZ>
```

This code may include not only the city and state of the recipient, but the full street address as well. The data specified using this code is placed verbatim onto the fax cover sheet.

Maximum field length: 59 characters

TOCOMPANY, TO_COMPANY**Examples:**

```
<ToCompany:Smith, Inc.>
<to_company:Acme>
```

This code specifies the recipient's company name. The data specified using this code is placed verbatim onto the fax cover sheet.

Maximum field length: 59 characters

TOCONTACTNUM, TO_CONTACTNUM**Examples:**

```
<ToContactNum:555-1234>
<to_contactnum:555-1234>
```

This is the recipient's voice phone number. The data specified using this code is placed verbatim onto the fax cover sheet.

Maximum field length: 31 characters

TOFAXNUM, TO_FAXNUM

Examples:

```
<ToFaxnum:555-1234>
<to_faxnum:555-1234>
```

This code indicates the fax number to dial when sending the fax. Special characters and dialing macros may be used in conjunction with the fax number; for a list and description of valid characters, see Chapter 8, Managing Faxes and Attachments.

Maximum field length: 31 characters

TONAME, TO_NAME

Examples:

```
<ToName:Bob Smith>
<to_name:frank>
```

If the name specified matches one of your Phonebook ID's, then RightFAX automatically uses the corresponding individual or group entry to send this fax. Otherwise, the name will be placed verbatim on the fax cover sheet. If you wish to use an entry or group from another user's phonebook, use the syntax, "UserID!EntryID." Only published phonebook entries of other users may be referenced.

Maximum field length: 59 characters

UNIQUEID

Examples:

```
<UniqueID:XYZ120396>
```

This code assigns the Unique ID field (as displayed in the FaxUtil window) to a fax. If no Unique ID is specified using this code, one will be automatically created by the fax server. Unique ID's are useful for tracking documents or as a supplement to the two fax billing codes.

Maximum field length: 15 characters

Diacritical Character Support

Diacritical characters are foreign language or other special characters not normally found on the standard English keyboard. The diacritical characters available to you when creating a document depend on the PCL symbol set you are using. The RightFAX server automatically keeps track of and translates the following PCL symbol sets:

- 8U [Roman-8]
- 10U [PC-8 Code Page 437]
- 12U [PC-850 Multilingual]
- 0N [ISO 8859/1 Latin 1]
- 19U [Windows 3.1 Latin 1]
- 9U [Windows 3.0 Latin 1]

If diacritical characters do not appear as expected in the final fax image, the characters may be being translated by a code page on the RightFAX server that maps characters differently than the computer that originated the fax

The appearance of diacritical characters in your fax depends the symbol set used to create the characters and on the OEM code page of the RightFAX NT Server. To ensure that the diacritical characters included in a fax or on a fax cover sheet appear as expected, the symbol set used by the originating computer must map fully to the OEM code page on the RightFAX server.

Embedded codes encoded with one of the supported symbol sets are automatically translated into either code page 437 or 850, depending on the OEM code page of the RightFAX server. If NT is using an OEM code page of 437, then embedded codes in the above symbol sets will be translated into code page 437. If any other OEM code page is employed, then embedded code data will be translated into code page 850.

This automatic translation can be disabled with the registry entry:

HKEY_LOCAL_MACHINE\Software\RightFAX\FaxServer\NoTranslateEmbeddedCodes:REG_DWORD:1

The OEM code page used by the fax server can be determined by executing this command at a command prompt:

MODE CON:CP /STATUS

Successful Transmissions

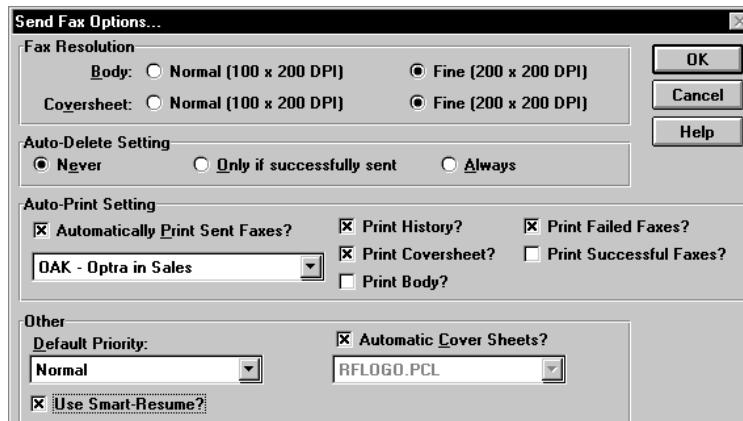
A successful transmission is not defined by how the information was actually received at its destination. It only means that RightFAX successfully made the connection, transmitted the information across the line, and received information from the target fax machine that indicated fax information was received.

Failed Transmissions

If for some reason a transmission attempt is unsuccessful, RightFAX will display the code "ER" (error-retry) and a brief error message in the status column of FaxUtil. After a certain number of attempts (normally 5), RightFAX will quit trying, consider the transmission failed, and display the code "ED" (error-dropped) in the status column of FaxUtil. RightFAX then sends a popup message to your screen stating that the transmission failed. See [Appendix A](#) for a complete list and description of error messages.

Options for Sending

Set the default resolution, fax deletion, printing, priority, and cover sheet options by selecting **Send Fax Options...** from the **Options** menu.



Fax Resolution

Faxes can be sent at two different resolutions: Normal - 100 x 200 dots per inch (DPI) and Fine - 200 x 200 DPI. Normal mode works well for draft-quality resolution and shorter transmission times, while Fine resolution is recommended for high-quality printed documents and optical character recognition (OCR). You can set separate resolutions for the fax body and fax cover sheet. The cover sheet fields will only be available if the **Automatic Cover Sheets** option is enabled (see "Automatic Cover Sheets" below).

Auto-Delete Setting

Because fax images can consume a considerable amount of disk space, you may want to automatically delete a fax as soon as it has been sent. You can specify whether to delete all faxes, only those successfully sent, or none of the faxes. The disadvantage to using this option is that you will not be able to view what you sent, it will not appear on your fax list, and cannot be forwarded. However, it is important to note that enabling automatic deletion DOES NOT affect your original document if it was created in another application. If your administrator has enabled **Archive Sent Faxes** for your mailbox, it will override these auto-delete settings, and they will be disabled.

Auto-Print Setting

You can specify whether to print all faxes and which printer to use. Choose from the drop-down list of network printers (set up by the administrator). Toggle the **Print History**, **Print Cover Sheet**, and **Print Body** fields to print the fax cover sheet, transmission history, or fax body, respectively. Toggling the **Print Failed Faxes** or **Print Successful Faxes** fields prints unsuccessfully and successfully sent faxes on the specified printer. You must set either or both of the **Print Failed Faxes** or **Print Successful Faxes** fields before you set the other options, otherwise the settings are invalid.

Default Priority

The **Default Priority** can be set at low or normal. This determines the priority at which all faxes are responded to by the fax server unless otherwise specified on an individual basis in the **Fax Information** screen. High priority is not available as a default, however, your administrator can make this setting available to you for use on an individual fax basis.

Automatic Cover Sheets

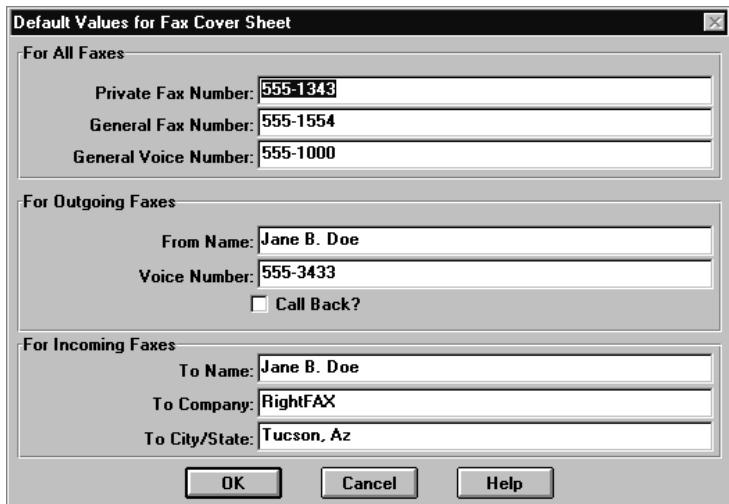
RightFAX automatically creates and sends a cover sheet for you when you send a fax. However, if you do not want RightFAX to generate a cover sheet for your fax, you can disable this feature by toggling off the **Automatic Cover Sheets** option. Regardless of whether you have this option enabled or not, you are still responsible for supplying the system with the required fax information, such as the recipient's name and fax number. Only when the automatic cover sheet option is enabled, can you adjust the resolution at which the cover sheet is sent (see previous page).

Use Smart-Resume

RightFAX incorporates technology that allows the fax server to intelligently resend only the portion of a fax which failed to be sent. For example, if you are sending a 50-page fax and the transmission is broken after 40 pages, normally all 50 pages would have to be resent. By enabling this feature, the server will only resend the last 10 pages. The server can also automatically add a page at the beginning of the retransmission which indicates that this is a continuation of a previous fax (must be configured by an administrator). This option can be set on a per-fax basis in the **Fax Information** dialog.

Cover Sheet Information

RightFAX will automatically create a cover sheet for you from the information supplied by embedded codes in the document or entered in the **Fax Information** screen. Some of this data may include items that you use on most or all of your cover sheets, such as your name and fax number. Completing the fields in the **Cover Sheet Information** option in the **Options** menu will automatically fill-in this information by default every time you send a fax.



Note: This dialog will appear the first time you log into FaxUtil to prompt you to complete this information. It will only prompt you once.

Fax Approval System

For customers with strict review requirements, RightFAX includes the ability to hold outbound faxes for approval by a full or group administrator. If your administrator has determined that all of your faxes must be approved before being sent (set in Enterprise Fax Manager on a per-user basis), they will be held for approval before sending. A full administrator, your group administrator, or your group's alternate administrator can retrieve a list of faxes waiting for approval. The administrator may then view each fax and decide whether to approve or deny the fax.

Approval is given or denied by selecting **Approve Fax** or **Disapprove Fax** from the **File** menu. The reason for approval or denial may be entered (up to 450 characters) and stored with the date and user ID of the approving agent in the fax history. The administrator also has the option to delete the fax, rather than approve or disapprove it. If the fax is approved, it is immediately scheduled to be sent. If the fax is not approved, it will be assigned a status of ED: Approval Denied.

4

Receiving Faxes

In this chapter:

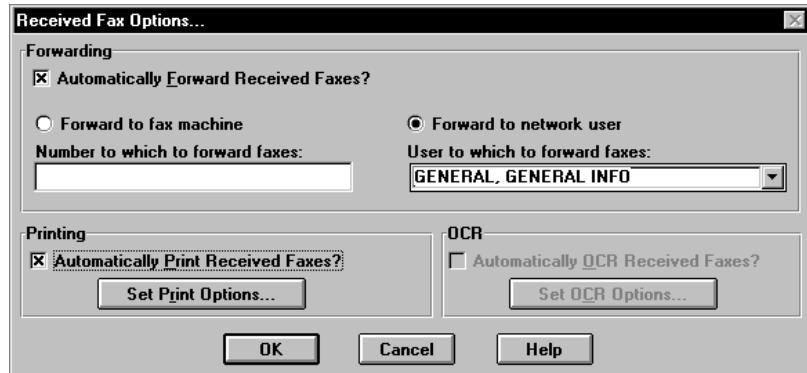
- Receiving Faxes
- Receive Fax Options
- Smart Fax Distribution

Receiving Faxes

Receiving faxes in your FaxUtil mailbox is a passive operation. You will receive faxes while you are in your mailbox, while working in other applications, when you are not in the office, and even when your computer is off. All processing and conversions happen at the fax server, so receiving faxes does not interfere with your other work.

Receive Fax Options

You can automatically forward, print, or OCR any fax as soon as you receive it. To set up any of these options, select **Receive Fax Options** from the **Options** menu.



Be wary of forwarding in endless circles. For example, if you forward all your faxes to John, who automatically forwards all his faxes to Mary, and Mary automatically forwards her faxes to you, faxes will cycle continuously and cause a serious error at the server.

Automatic Forwarding

You can automatically forward faxes to either a fax machine or another network user as soon as you receive them. Toggle the desired option and specify the number or user ID to which you are forwarding. Forwarding faxes on an individual basis is discussed in greater detail in Chapter 7, [Forwarding and Routing Faxes](#).

Automatic Printing

You can also automatically print faxes as soon as you receive them. Toggle the **Automatically Print Received Faxes** box and set the desired print options by clicking the **Set Print Options** button. Printing faxes on an individual basis is discussed in greater detail in Chapter 6, [Printing Faxes](#).

Automatic OCR

You can convert fax images to editable text as they are received by toggling the **Automatically OCR Received Faxes** field. If you select this option, remember to specify the OCR guidelines under **Set OCR Options** (see below). You can only use OCR if you have purchased the optional Right-FAX OCR module and your administrator has set up the appropriate permissions.

If you enable automatic OCR and choose to have your faxes routed to e-mail, both the fax image and the OCR output will be routed to your e-mail.

OCR Options

If you choose to automatically OCR all received faxes, you must set the OCR options to receive the desired output.



In the **Association** field, choose the application with which you want the OCR output to be associated. The associated application must be installed on your computer. The application will be launched when the OCR output is viewed or printed.

In the **Format** field, toggle the text format used to interpret your fax pages. ASCII will produce a plain text file, while Smart ASCII will approximate the original format. RTF (Rich Text Format) is a format which preserves fonts and formatting, and is only available for Windows clients.

In the **Layout** field you may toggle **WYSIWYG** (What You See Is What You Get) or **Left Justified**. **WYSIWYG** will try to read the fax in the layout it sees. If, for instance, RightFAX sees that the fax has three columns, it will try to read the document in column style. If you choose **Left Justified**, RightFAX will read and display the output from the left margin of the fax.

Smart Fax Distribution

Inbound faxes can be distributed systematically between a group of users for processing. If you are a member of such a distribution group (determined by your administrator), you will continue to receive inbound faxes as long as you are logged into FaxUtil. If you wish to work in FaxUtil without automatically receiving faxes, your administrator may have configured your system so that you can take yourself temporarily out of the distribution loop by selecting **Refuse Fax Distributions** from the **Options** menu.



Viewing and Annotating Faxes

In this chapter:

- The RightFAX Fax Viewer
- Windows Fax Viewer

The RightFAX Fax Viewer

One advantage of storing faxes electronically is the ability to view them without having to print them on paper. Any fax in your FaxUtil mailbox can be viewed and annotated on your computer screen using the RightFAX Fax Viewer.

Windows Fax Viewer

To view a fax, select it in the FaxUtil mailbox. Press the **View** button on the toolbar or select **View Body** from the **Fax** menu. RightFAX will display the entire fax including the cover sheet when viewing received faxes, and only the body of sent faxes. Use the **View Cover Sheet** option to view the cover sheet of a sent fax. The cover sheet is handled separately from the fax body so that one fax body can be attached to multiple cover sheets (i.e. you can send the same fax to several people).

Note the toolbar at the top of the Fax Viewer window; the buttons on this toolbar display most of the tools used to annotate faxes. You can also select commands from the menus. All of the commands, toolbar buttons, and corresponding menu options are described below.



View button in toolbar

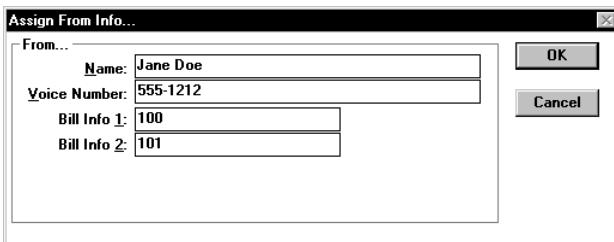
<u>Command</u>	<u>Button</u>	<u>Menu</u>	<u>Key Equivalent</u>	<u>Function</u>
Cut		Edit	Shift+Insert	Cuts or deletes the highlighted portion of the fax and places it on the Windows Clipboard
Copy		Edit	Ctrl+Insert	Copies the highlighted section of the fax to the Windows Clipboard
				
Page Orientation		Rotate		Flips or rotates the fax in 90 degree increments
Full Page		Zoom	F	Scales entire fax page to fit on the screen; views entire layout of fax; (can also be selected by clicking the right mouse button when the Zoom in a Little tool is selected)
Full Width		Zoom	W	Scales the fax page to fit within the width of the screen, but may still need to be scrolled up and down; this is the default scaling mode when a fax is first opened
100% Viewing				Cancels all other scaling modes and displays fax at 100% (i.e. each dot on the fax is represented by one dot on the screen)
Zoom in 50%		Zoom	+	Zooms in for a “close-up” of the fax image; range=0% to 1600% in 50% increments as displayed in the status bar at the bottom of the window
Zoom out 50%		Zoom	-	Zooms out to “distant” view of the fax image; range=0% to 1600% in 50% increments as displayed in the status bar at the bottom of the window
Pointer Tool				Use the pointer tool to select, move and resize floating notes and other objects
Paste		Edit	Shift+Insert	Pastes the image on the Clipboard in the desired location; image on clipboard may have originated in another application or may have been created using the cut and copy tools of the Fax Viewer; can paste the image in its original size by clicking the left mouse button or can paste the image to fit in a rectangle you draw by clicking and dragging the left mouse button
Select				Highlights or selects a portion of a fax page; once selected, it can be cut and copied to the Windows Clipboard
Pan				Mouse pointer becomes a “hand”; by clicking and dragging, you can move the page around

<u>Command</u>	<u>Button</u>	<u>Menu</u>	<u>Key Equivalent</u>	<u>Function</u>
Binoculars				Use this tool to select portions of the page to look at in detail; a new window will appear with a magnified view
Zoom Selection				Drag a rectangle around a portion of the fax to enlarge it to fill the screen; pressing the right mouse button with this tool selected will return the fax page to full page view; (default tool when a fax is initially viewed)
Text Annotation				Inserts text into a selected area; text is sized to fit area
Floating Notes				Add movable, temporary notes to the fax image
Previous Page		Page	Ctrl+PgUp	Displays previous fax page; effective only if current page is 2 or greater
Next/Prev Page		Page	Ctrl+PgDn/PgUp	Displays next fax page; effective only if total number of pages is greater than one
Quick Delete		Edit	Ctrl+D	Deletes the fax image currently being viewed
Zoom in a Little		Zoom	Ctrl++	Increases fax image in 2% increments
Zoom out a Little		Zoom	Ctrl+-	Decreases fax image in 2% increments
Enhance Image		Options	E	Uses gray scale to soften the image and make it look smoother; default display is unenhanced (all specks and letter edges will be shown)
Scale Speed		Options	S (speed) B (quality)	Specifies better speed or better quality in imaging process
Image Type		Options		Three options for displaying image in Viewer: Text = text only, no graphics or complex images; Line Image = graphs, flowcharts and complex images; Photograph = complex dithered images like photos or color graphics
Invert Color		Options	I	Reverses the colors of the background and text (black text on white background reverses to white text on a black background)
Clip at Screen Ratio		Options		Allows you to cut and paste at the size you see on the screen instead of at the actual fax size

<u>Command</u>	<u>Button</u>	<u>Menu</u>	<u>Key Equivalent</u>	<u>Function</u>
Set Clipping Ratio		Options		Allows you to cut and paste images at a different ratio than what you see on the screen; range =1 to 256 (the higher the setting, the more memory required by your computer)
Save Settings on Exit		Options		Saves the current configuration and attributes of the Fax Viewer for use the next time you view a fax
Image Information		Help		Displays information (height, width, resolution, orientation, format, color, etc.) about the fax image currently being viewed
Route Fax	Edit		Ctrl+R	Routes the fax being viewed to another network user
Stamp	Edit			Stamps the fax being viewed as approved or disapproved

Assign From

When you receive a fax, the “from” field may not be complete. To fill in the sender’s name or assign billing information for cost recovery purposes, select **Assign From** from the **Edit** menu in the Fax Viewer. If you enter the sender’s name here, it will appear in the From column in the fax mailbox. If these fields are required by your administrator, the fax will read “Info Not Complete” in the status column if they are incomplete.

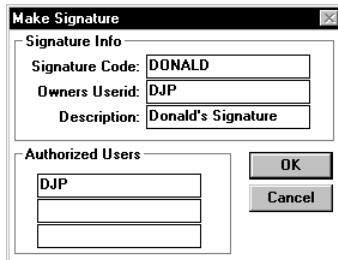


Make Signature

Only users with RightFAX administrative privileges can make signatures.

To personalize outgoing faxes, RightFAX offers you the ability to add signatures to documents. To create a signature object, you can fax your signature to your FaxUtil or scan it into RightFAX as a new fax. For scanning instructions, see Chapter 8, Managing Faxes and Attachments.

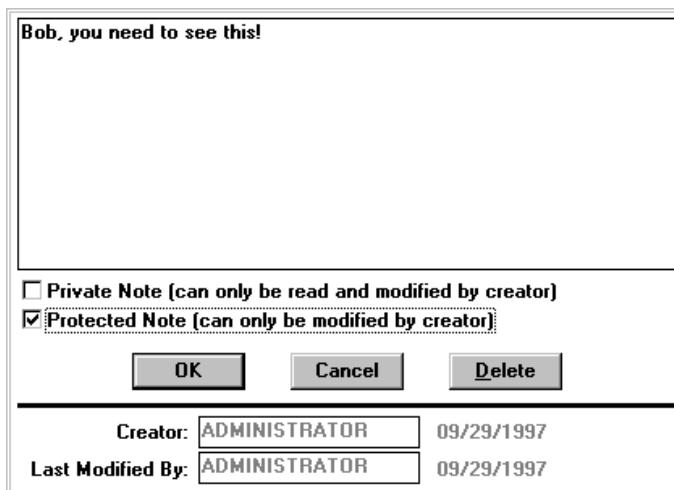
View the fax, and choose the **Select** button from the Fax Viewer toolbar. With the mouse, highlight your signature, then choose **Make Signature** from the **Edit** menu.



Complete the **Make Signature** dialog box by designating a **Signature Code**, **User ID**, and **Description**. Specify which users, by user or group ID, can use this signature in their faxes. The owner of the signature is not implicitly authorized to use it, so be sure to include your own user ID in one of the **Authorized Users** fields.

Floating Notes

You can add Floating Notes to faxes while viewing them in the RightFAX Fax Viewer by selecting the Notes button on the toolbar and highlighting the desired position on the image. Floating Notes, which appear in a box, are not “burned” into the fax image. They will not appear when the fax is printed or faxed to another fax machine. They only stay with the image when it is forwarded or routed to a network user.



You can place multiple notes on a single page and edit or delete text. You can also mark notes Private (only seen by creator) or Protected (only editable by creator) for added security.

Rotating Annotations

Annotations, stamps and notes added to an image rotate as the image is rotated. In addition, annotated text is written in a wrapped-blocked mode instead of simply writing a single line. The Viewer proportionately resizes the text as you zoom in and out on the image.

Note: You may be restricted from annotations as determined by your RightFAX administrator.



Printing Faxes

In this chapter:

- Printing Sent and Received Faxes
- Printing From FaxUtil
- Printing From the Fax Viewer
- Printing Binary File Transfers
- Print Fax Histories
- Print Options
- Automatic Printing

Printing Sent and Received Faxes

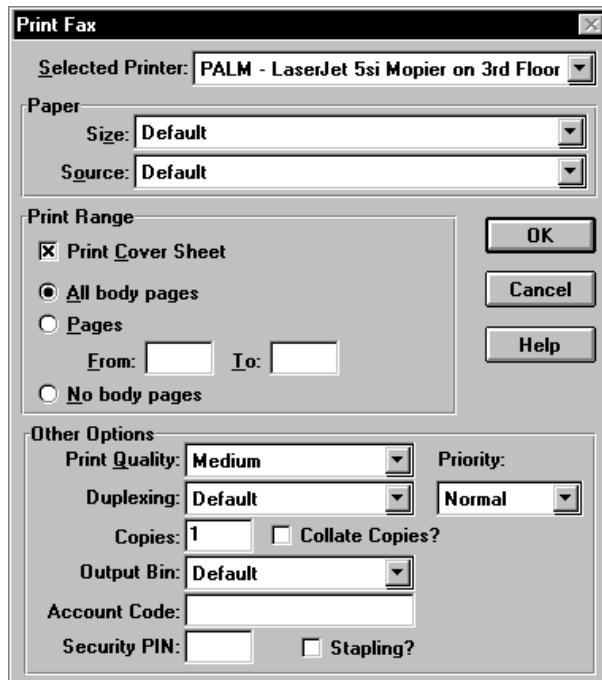
There are several ways to print a fax. As described below, you can print from the FaxUtil mailbox and the Fax Viewer. You can even print binary file transfers from FaxUtil.

Printing From FaxUtil



Print button in toolbar

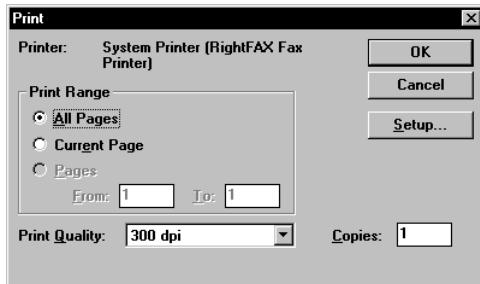
In the FaxUtil mailbox, highlight the desired fax and select the **Print** button on the toolbar or select **Print** from the **Fax** menu. In the **Print** dialog box, set the printer options as desired, then press **OK** to begin printing.



Printing From the Fax Viewer

To print a fax while you are viewing it, select **Print** from the **File** menu or press [Ctrl+P]. Set the printer options as desired then press OK. The fax will be printed exactly as it appears in the Fax Viewer. Printing from the Fax Viewer requires your client workstation to do all the processing, as opposed to printing from FaxUtil in which the server does the processing.

You can print directly from the workstation to a local printer by printing from the Fax Viewer.



Printing Binary File Transfers/OCR output

To print a binary file transfer or OCR output, highlight the fax and press **Print** on the toolbar or select **Print** from the **Data** menu. If you select **Print** from the toolbar, you must choose between printing the fax image or the file format/OCR output. If you print the file format or OCR output, RightFAX will launch the application associated with the file and print from there.



Print Fax Histories

You can print the history of a fax in your FaxUtil mailbox. Highlight the desired fax and select the **History** button on the toolbar or **Show History** in the **File** menu. In the **History** dialog box, click on the **Print** button and set the desired print options.

Print Options

There are several print options which may be varied according to your needs:

Print Range

Ordinarily, all fax pages, from the first to the last, are printed. In addition, for sent faxes, you can optionally include the cover page in your printed output by selecting the **Print Cover Page** check box.

Paper Source and Size

Set these options to the appropriate values. They may be limited by your printer's capabilities.

Print Quality

Select the desired print quality based on the purpose of your document. When choosing the printing resolution, it is important to consider two things. First, RightFAX converts faxes in one of two modes: Normal: 100x200 DPI (dots per inch) and Fine: 200x200 DPI. You can change the image resolution on an individual basis. Second, different printers have different printing capabilities. Some print up to 300 DPI, while newer and faster ones may print at 600 DPI or more. Therefore, depending on your printer and your document, setting the print quality to **High** or **Low** may not give you the quality you need. Regardless of your printer or your document, you will get the best results at the fastest speeds if you use the **Medium** resolution, as it always falls within the acceptable range.

Copies and Collating

Select the number of copies you wish to have printed and whether you want them to be collated at the printer.

Priority

You can select the priority of the printing job. **High** priority will be moved to the front of the print queue. **Normal** will be taken in the order received, and **Low** will be printed if there are no other higher priority jobs in the queue.

Duplexing

This option is only available if the selected printer has duplexing capabilities.

Output Bin

This option is only available if the selected printer has the ability to output to separate mailboxes or bins.

Account Code and Security PIN

These options are only available if account numbers and security codes are required to print.

Stapling

This option is only available if the selected printer has stapling capabilities.

Automatic Printing

You can automatically print all incoming and/or outgoing faxes. For more information about these features, please see Chapter 3, [Creating and Sending Faxes](#) and Chapter 4, [Receiving Faxes](#).



Forwarding and Routing Faxes

In this chapter:

- Redistributing Faxes
- Forward to Fax Machine
- Forward to Network User
- Automatically Forwarding Faxes
- Routing to a Network User
- Incremental Searching and Sorting

Redistributing Faxes

You can forward and route faxes from your FaxUtil mailbox to another network user or a fax machine anywhere in the world. RightFAX provides three simple features for automatically or manually redistributing your faxes to others: **Forward to Fax Machine**, **Forward to Network User**, and **Route to Network User**.

Forward to Fax Machine



Forward to Fax Machine button in toolbar

Forward to Fax Machine will not remove the original fax from your mailbox and creates a second entry in the fax list for the copy.

Forward to Fax Machine lets you send a fax already in your fax mailbox to any other type of group III fax system; this includes thermal fax machines, other RightFAX installations, and even users on your own RightFAX system (including yourself). To use this option, highlight the fax you want to forward from your mailbox, then press the **Forward to Fax Machine** button on the toolbar or choose **Forward to Fax Machine** from the **File** menu. A copy of the fax appears at the top of your fax list with the status "Info Not Complete." Edit the fax and fill in the cover sheet information as you would for any other outgoing fax. Completion of the fax information releases the fax for transmission. You must also use this procedure to resend a fax that has been successfully sent. To automatically forward all incoming faxes to a fax machine (i.e. to your hotel when you're away from the office) see Chapter 4, [Receiving Faxes](#).

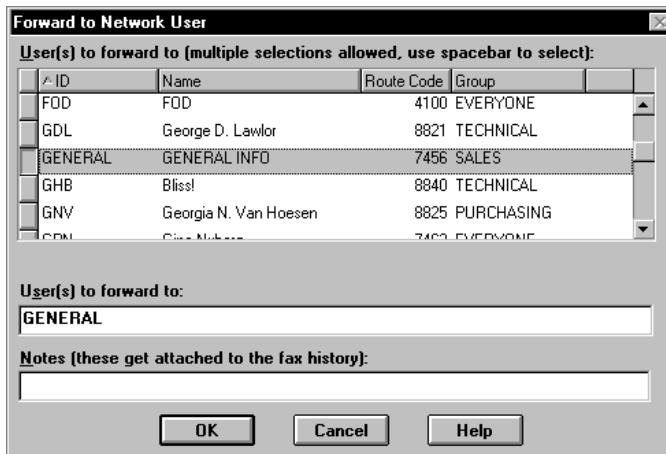
Forward to Network User



Forward to Network User button in toolbar

Forward to Network User allows you to send a copy of a fax in your mailbox to another user, or users, on your network. Using **Forward to Network User** rather than **Forward to Fax Machine** saves time and effort; since the recipient is already in the RightFAX system, you only need to specify their RightFAX user ID and you do not have to wait for the fax conversion before the copy is forwarded.

To forward to another network user, select the fax you want to forward, press the **Forward to Network User** button on the toolbar or choose **Forward to Network User** from the **File** menu, then choose one or more user ID's. You can forward faxes to a group of users by clicking on the button to the left of each desired user or entering a list of their ID's separated by commas.

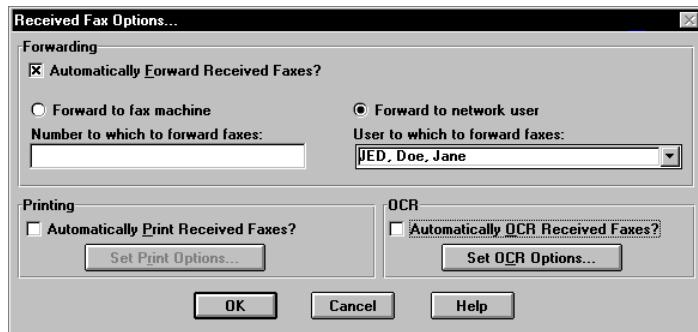


Forwarded faxes will follow each user's incoming fax rules, i.e. if they have specified all incoming faxes to be OCR'ed, the forwarded fax will be OCR'ed. If you wish to include any notes with the fax, put them in the **Notes** field. They will be included in the fax transmission history, which can be accessed by clicking on the **History** button or by choosing **Show History** from the **File** menu. To automatically forward all incoming faxes to a network user (i.e. to your secretary when you are out of the office), see Chapter 4, Receiving Faxes.

*Forward to Network User
does not remove your
original fax from your fax
mailbox.*

Automatically Forwarding Faxes

Each RightFAX user's mailbox can be configured to automatically forward all received faxes to a different fax number or to another RightFAX user or group. To configure autoforwarding, open your FaxUtil mailbox, then select **Receive Fax Options** from the **Options** menu. This opens the **Received Fax Options** dialog:



Check the option **Automatically Forward Received Faxes**.

To forward to a different fax number, click on **Forward to Fax Machine**, then type the fax number in the **Number to Forward Faxes** field.

To forward to another RightFAX user's mailbox, click on **Forward to Network User**, then enter or select the RightFAX user ID in the **User to Forward Faxes** field. If you want to automatically forward faxes to a RightFAX group, type the group name in the **User to Forward Faxes** field.

Routing to a Network User

Route to Network User, under the **File** menu, transfers a fax from your mailbox to another user's mailbox. When routing, you can enter only one name at a time; groups are not permitted as with forwarding. This is because with routing you are actually transferring ownership of the fax, and a single fax can only have one owner. In forwarding, although each person receives a copy of the fax, you still own the original. If you need to add any notes, include them in the **Notes** field. They will be inserted into the transmission history which can be accessed by clicking on the **History** button or choosing **Show History** from the **File** menu.

When you route a fax to another user, their automatic receive options will apply. If he or she is set up to automatically print, forward, or OCR the fax, it will be processed as if it were a newly received fax.



Route to Network User button in toolbar

Incremental Searching and Sorting

When routing and forwarding to another network user, you can search for the user ID. Double-clicking on the title bar of the ID, Name, or Group columns will highlight that column. You can now perform an incremental search within that column. Begin typing the first few letters of the user ID, name of the person, or group you are looking for and the cursor will automatically move to that section of the list.

Double-clicking the left mouse button on any column header will sort the list in ascending order. Double-clicking with the right mouse button will sort the list in descending order.



8

Managing Faxes and Attachments

In this chapter:

- Kick Fax
- Transmission History
- Recording Thermal Faxes
- Exporting Data
- Combining Faxes
- Splitting Faxes
- Scanning Faxes
- Library Documents
- Creating Forms
- Binary File Transfer
- Optical Character Recognition
- Special Dialing Characters

Kick Fax

If you set the automatic delete option to Delete Always, your fax will be deleted as soon as the error-dropped condition occurs and you will not be able to kick the fax.

The **Kick Fax** option appears on the **File** menu. It can do one of three things based on the status of your fax. For faxes with "error-retry" status messages (i.e. ER: Fax Number Busy), selecting **Kick Fax** will immediately try to send the fax again, bypassing the standard server delay. After RightFAX has tried to send a fax and failed five times, it stops trying and considers the transmission failed. This is called an "error-dropped" condition (i.e. ED: Human Answered). Selecting **Kick Fax** at this point will cause RightFAX to try to send the fax one more time. You can kick an error-dropped fax as many times as you like. Selecting **Kick Fax** for a fax with the status "Scheduled for Send" will update the status of the fax. The **Kick Fax** command will not resend a fax that was successfully sent.

Transmission History

To learn more about a specific fax, select the **Show History** option from the **File** menu or select the **History** button on the toolbar. The complete history will appear, providing information about what happened to the fax and when. The following events are recorded in the history:



Show History button in toolbar

- When a fax was sent, or attempted to be sent; the result of the send attempt; automatic retries
- When a fax was received
- When a fax was manually routed from one user to another, the user initiating the route command, and any notes added to the fax
- When a fax was printed
- When a fax was converted to text using OCR
- When a fax was automatically routed using OCR
- When a fax was forwarded from one user to another, the user initiating the forward command, and any notes added to the fax.

Note that RightFAX derives parts of its transmission records from the fax boards themselves. Sometimes information from the board may be garbled and difficult for RightFAX to read or understand, so an "Unknown Error" is recorded. GammaLink boards report a specific error number so you can refer to the GammaLink fax board manuals for explanations of these error codes.

Recording Thermal Faxes

If your organization tracks fax billing information, you may want to record faxes received and sent from freestanding thermal fax machines at your site.

For this purpose, RightFAX includes the **Record Thermal Fax** feature.

When you select **Record Thermal Fax** from the **Fax** menu, a modified **Fax Information** screen appears. Notice that you can now edit the number of fax pages and whether the fax was received or sent. If you do not specify otherwise, RightFAX assumes the fax to have been sent. All required fields still apply. After you have completed the information for a thermal fax, it appears in your fax mailbox with “Thermal Record” in the status column. You may edit or delete this entry just like any other fax entry but there is no image or history associated with it.

Exporting Data

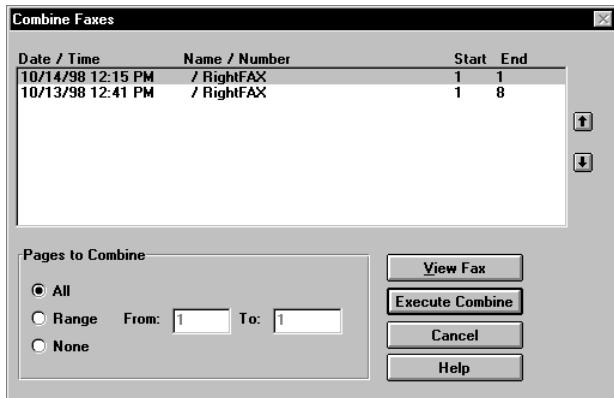
Binary files or faxes that have been OCR'ed can be saved to a network or local directory. Highlight the desired fax, select **Export...** from the **Data** menu, and complete the path information. This function is similar to the **Save As...** command in many applications.



Combine button in toolbar

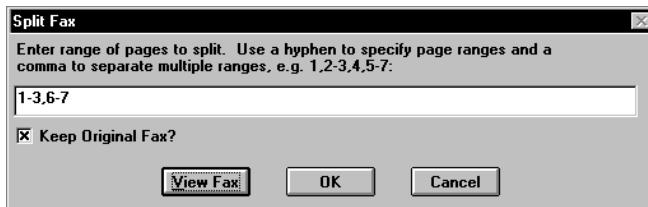
Combining Faxes

You may want to combine several faxes to send them out as one complete document. To do this, use the **Combine** option.



Send all of the documents that you want to combine to the fax printer by printing them from their respective programs. Once they are in the mailbox, select each of them and click on the **Combine** button or choose **Combine** from the **Fax** menu. Arrange the faxes in the desired order and select the pages to combine. You can preview your new combined fax with the **View Fax** button. Clicking on the **Execute Combine** button will create a new composite fax in your fax mailbox with the status "Info Not Complete." To send it, just complete the fax information as you would for any other fax.

Splitting Faxes



The Split Fax feature, located under the Fax menu in FaxUtil, allows you to “split” received faxes into separate documents by specifying different page ranges. For example, a single two-page fax can be separated into two faxes, each containing one page. This feature is especially useful when multiple documents arrive as a single fax.

Scanning Faxes

If you have a scanner that is compatible with RightFAX, you can scan documents directly into RightFAX. If your scanner is not listed as compatible, you can still indirectly fax a scanned image from RightFAX by scanning into another application and then printing to the fax printer.

Configuring the Scanner

You must configure your scanner type before scanning in RightFAX. First, make sure that the scanner is installed at your workstation and the power is on. Then select **Configure Scanner** from the **Options** menu. From the list of compatible scanners, highlight your scanner type and press **Test**.

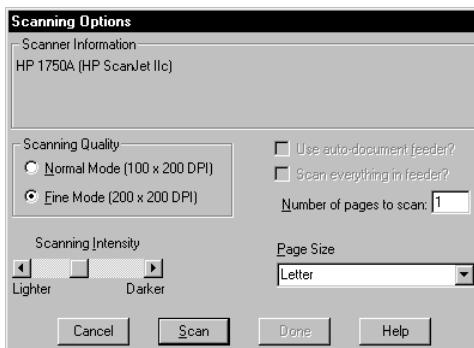
RightFAX will perform a compatibility test on your scanner. If no error appears, then your scanner will function with RightFAX and you should press **OK**.

If you will be using a SCSI scanner, you should install WINASPI or WINASPI32. Other scanners should have the appropriate drivers installed.

Scanning With a Compatible Scanner

You can use the scanner two different ways. You can add a scanned attachment to an existing fax or you can create a new fax consisting entirely of the scanned attachment.

- 1a. If you want to add a scanned attachment to a document you are ready to send, print the document to the fax printer in the normal manner. If you have used a macro or embedded codes to provide RightFAX with the destination, you should leave at least one required field incomplete to prevent RightFAX from sending the fax before you have had a chance to scan your attachment.
- 1b. Start the FaxUtil program. After the initial processing has taken place, the fax you just printed will appear in your mailbox with the status "Info Not Complete." Highlight the fax and select **Edit** from the **File** menu to edit the cover sheet information. If you have not already provided RightFAX with the destination information, you may do so now. Proceed to step 3.
2. To create a new fax using only a scanned image, start the FaxUtil program and select **New** from the **Fax** menu. In the **Fax Information** screen, fill in the destination information as you would for any other fax.
3. To begin the scanning process, select the **Scan** button in the **Fax Information** screen.



4. Enter the number of pages you wish to scan. (If your scanner is equipped with an automatic document feeder, you can enter 0 in this field, and RightFAX will count the number of pages you pass through the feeder.)

5. In the **Scanning Intensity** field, change the value to reflect the amount of contrast in the document. Contrast is the difference between dark and light areas on the page.
6. The default page size is letter paper. This can be adjusted to legal or A4 size paper.
7. In the **Quality** field you can toggle between scanning in the **Normal** fax resolution of 100x200 DPI (Dots Per Inch), and the **Fine** resolution of 200x200 DPI.
8. If your scanner has a document feeder, you can choose how you want to use it by toggling the **Use auto-document feeder** box and/or the **Scan everything in feeder** box. (These fields will be grayed-out if you do not have a document feeder.) You should also enter the number of pages to be scanned. When you have entered the desired values, press **Scan** to begin scanning. If you are using a document feeder, RightFAX will wait for pages to be placed in the feeder, and scan without further prompting until the feeder is empty. If you are using the scanner bed, you will need to align the page to be scanned on the bed, then press a key to begin scanning. RightFAX will prompt you for pages until you have scanned the number set in the pages field. When you have finished scanning, press **Done**.
9. Once all the pages have been scanned, you will be returned to the **Fax Information** screen, where you can continue to add more information and finally press [F10] or OK when you are ready to send the fax.

Library Documents

The RightFAX library can store documents that you fax on a frequent basis (i.e. company literature, credit applications, or employment forms) for easy retrieval.

Storing Library Documents

Only users who have been assigned privileges can add and edit documents in the RightFAX library.

To store a document in the library, print the document from its original application to your FaxUtil through the fax printer on your network.

Once the fax arrives in your mailbox, highlight it and select **Store in Library** from the **Fax** menu. In the **Store Fax as Library Document** dialog, enter an ID code and a document description. The ID code must be unique; a drop-down list of ID codes used for other library documents is available. The number of pages in the document is generated automatically.

By default, all documents are initially accessible via the LAN (FaxUtil and Web Client library). You can assign additional venues by which this document will be accessible if you have installed the optional RightFAX Docs on Demand module (purchased separately). If this optional module is not installed and licensed, the Accessibility fields will appear grayed-out (disabled).

- **Publish to LAN** - makes library documents available in the FaxUtil and Web Client libraries.
- **Publish to Web** - makes library documents available on the Web through Web Fax Tools (requires Docs on Demand).
- **Publish to FOD** - makes library documents available by telephone through Fax on Demand (requires Docs on Demand).

You can specify the date you want your document to become available for retrieval by clicking in the **Activation Date** check box and entering a date. You can specify when you want your library document to become unavailable for retrieval by clicking in the **Expiration Date** check box and entering a date.

Retrieving Library Documents

Including library documents in your fax is easy. You can access a library document through the **Fax Information** screen or using embedded codes. For more information, see Chapter 3, [Creating and Sending Faxes](#).

Creating Forms

The forms feature allows you to "overlay" the image of a form (i.e. your company letterhead, invoices, etc.) on your fax to give the appearance of being printed on it originally.

When creating forms, remember that users can send faxes in **Fine** (200x200 dots per inch) or **Normal** (100x200 dots per inch) resolution. You should create your form in **Fine** resolution as it easier to decrease resolution without losing quality than it is to increase resolution without losing quality. To ensure that your form will be created in **Fine** resolution, you must set this option in FaxUtil. Select **Send Fax Options** in the **Options** menu. Toggle the **Send Fax Body** as **Fine** resolution. Click **OK** to accept the change.

Now you must print the form document from its original application to your FaxUtil mailbox. You can also scan or fax the document to your mailbox, however, this produces a poorer quality image.

Once the form arrives in FaxUtil, you can view it using the RightFAX Fax Viewer to ensure that it is acceptable. After closing the Fax Viewer, you should select the form by highlighting it using the fax buttons. Select **Store as Form** from the **Fax** menu and complete the **Store Fax as Form** dialog.

Users must be assigned rights in their Enterprise Fax Manager user record to add or edit forms in FaxUtil.



TTI Line Removal

This option is only available if you are creating your form from a received fax (i.e. you faxed the form to yourself). If this field is set to **None**, the TTI lines (transmission information headers at the top of the page) will not be removed from the fax and will become part of the form. If you select **Use Blank Lines**, the TTI lines on the form will be covered by blank lines, effectively hiding them, yet not removing them. If you select **Cut Out Lines**, you will be deleting the TTI lines from the fax.

Paper Size

This option is only available if you are creating your form from a received fax (i.e. you faxed your form to yourself). If you select **None**, RightFAX will not adjust the form to fit a specific paper size. The form will be created from the actual size of the fax. Selecting **Letter**, **Legal**, or **A4** will cause RightFAX to scale the form to fit the specific paper size.

Form Code

This unique code is used in embedded codes to identify the form.

Description

This is a free form text field for your reference only.

Start Page

This field determines the beginning page of the fax document onto which this form is to be overlaid (i.e. if this form is the second page of your company letterhead, you would assign this value to 2 so that it would not be overlaid on the first page of your fax).

Overlay on All Pages

This field determines if all the pages of faxes are to be overlaid with this form. You should not toggle this box if this form is specific to a certain page on a multi-page fax.

Number of Pages

This value determines how many pages of the fax will be overlaid with the form. If it is set to 0, then the entire fax will be overlaid with the form. This option is only available if you did not toggle the **Overlay on all pages** field.

Secure Form and Authorized Group/User

You can secure forms by restricting them to specific groups or users. To secure a form, toggle the **Secure Form** field and use the drop-down list to select the user or group authorized to use the form.

Binary File Transfer

RightFAX gives you the option to send a document as a file, rather than as a fax image through a process called binary file transfer. Only other machines with fax boards have the ability to receive binary files (e.g. you cannot send a BFT to a simple thermal fax machine.)

To send a binary file, select **New** from the **Data** menu in FaxUtil. The **Data Information** screen, which is similar to the **Fax Information** screen, will prompt you for the file information. (Note that you cannot select **Library Documents, Form Types, or Scanned Documents** as you could in the **Fax Information** screen.)



If you need to send several files, you can zip them into one file using PKZIP.EXE. Specify the drive and directory where your document is located.

To choose a binary file to send, press the **Import** button. In the **Import Pages** window, click on the **Add** button to add a file to transfer. You can only transfer one file at a time. If you want to delete a file from your list, press the **Remove** button. When you have added the file, press **OK** to return to the **Data Information** screen. Complete the send information and click **OK**.



Once your file is ready to go, it will be listed in your RightFAX mailbox as a file size in kilobytes rather than number of pages. It will then be transferred as a file and will result in a status of "OK."

If you want to edit your outgoing document, choose **Launch** from the **Data** menu; this will launch the application that is associated with your file. You can also receive and print binary files and launch their applications; for more information, see Chapter 4, Receiving Faxes.

Optical Character Recognition

(Requires RightFAX OCR module, purchased separately)

RightFAX can convert received faxes into a specified application format in order to more easily edit them. For example, if you receive a draft of a proposal through RightFAX and you want to make large scale changes to it, you can OCR the fax into a word processing format and edit it in your favorite word processing application.

To OCR your fax, select it in your FaxUtil mailbox. Press the **OCR** button on the toolbar or select **OCR** from the **Fax** menu. Choose the output type, format, and layout, as well as which pages you would like to OCR.



OCR button in toolbar

The **Output Type** determines the application with which the OCR output will be associated and the file extension to be used. **Output Type** does not mean that the OCR output will be in the proprietary format of the chosen application. It does not make sense to choose MS-Paint or any other “graphics” application – the OCR output is always some form of text. Only applications which are currently installed on your computer will be listed.

In the **Format** field you have a choice of **ASCII**, **Smart ASCII**, or **RTF**. **ASCII** will produce a plain text file, while **Smart ASCII** will approximate the format it was originally given. **RTF** (Rich Text Format) is a format which preserves the original fonts and formatting.

In the **Layout** field, you can choose between **WYSIWYG** (What You See Is What You Get) and **Left Justified**. **WYSIWYG** will try to read the fax in the layout that it sees. If, for instance, RightFAX sees that the fax has three columns, it will try to read the document in column style. If you choose **Left Justified**, RightFAX will read from the left margin of the fax.

When you set the range of pages to be OCR'ed, the new pages will be added to the end of the new fax. For example, if you first decide to OCR pages 8, 9, and 10, then OCR pages 6 and 7, the order that they will appear in the text will be pages 8, 9, 10, 6, and 7.

Once the fax has been OCR'ed, the flags column on the information bar of your mailbox will be marked. RightFAX gives you the option of editing either the OCR output or the fax image; to edit the fax image, view it as normal with either the **View** button or the **View Body** option from the **Fax** menu. To edit the OCR output, highlight it and choose **Launch** from the **Data** menu. This will start the application associated with the file format you chose.

If you have problems launching your OCR'ed fax document, your Windows setup may be incomplete. This is especially common with Word for Windows. You should run the Word Setup program to configure it correctly in the Windows Registration Database, which tells Windows how to associate applications with files.

To automatically OCR all incoming faxes, see Chapter 4, [Receiving Faxes](#).

Saving the OCR Output

You can save the OCR output to a directory with the **Save** and **Save As** commands in the associated application. If you choose the **Save As** command, the new fax information is saved and the original is preserved. If you choose the **Save** command, the original fax information is overwritten by the new fax output.

Special Dialing Characters

There are several characters that represent RightFAX dialing functions. These can be used in embedded codes or in the **Fax Information** dialog to improve fax connections.

Character	Description
0 through 9	Phone numbers and access numbers
, (comma)	1-second pause
I	5-second pause
W	Wait up to 15 seconds for a dial tone
P	Pulse dialing tone
T	Tone dialing mode (default)
F	This character is replaced in the dial string by the user's domestic long distance Auto Billing Code
G	This character is replaced in the dial string by the user's international long distance Auto Billing Code
!	Hook-flash signal
*	Generates tone as would '*' button on touch-tone phone
#	Generates tone as would '#' button on touch-tone phone
@	Causes all following digits to be hidden on fax cover sheet
{	Causes dialing prefix to NOT be prepended
}	Causes dialing postfix to NOT be appended

Dialing characters are not case sensitive

If you have trouble sending faxes to international numbers, try putting two or three "I" characters after the number, for example: 011-44-321-230117iii



9

Phonebooks & Broadcast Faxing

In this chapter:

- RightFAX Phonebooks
- Creating Individual Entries
- Creating Group Entries
- Copying Entries
- Using Phonebooks to Send Faxes
- Importing Phonebook Entries
- Deleting Entries
- Printing Entries
- ODBC Phonebooks
- LDAP Phonebooks
- MAPI Phonebooks
- Broadcast Faxing

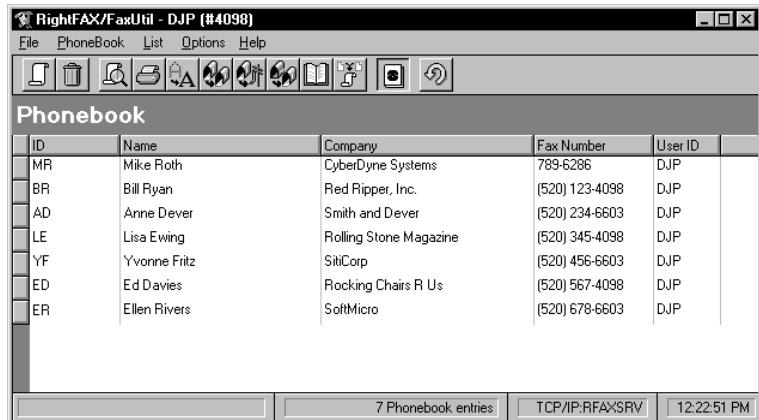
RightFAX lets you connect to contact information in your existing databases or you can create your own phonebook list and store it in RightFAX. ODBC, LDAP, MAPI, and RightFAX phonebooks can store frequently used names, fax numbers, and other related fax information, providing a convenient means of faxing quickly and accurately.

RightFAX Phonebooks

The RightFAX phonebook is RightFAX's built-in fax recipient database, customized for each RightFAX user. To open your phonebook, start FaxUtil (described in [Chapter 2](#)), then select **Phonebook** from the **List** menu, or click on the **Phonebook** button in the toolbar:



Phonebook button in the FaxUtil toolbar



Your private and published entries are displayed. If you added other users' phonebooks in the **Other** option of the **Options** menu, those entries are also displayed.

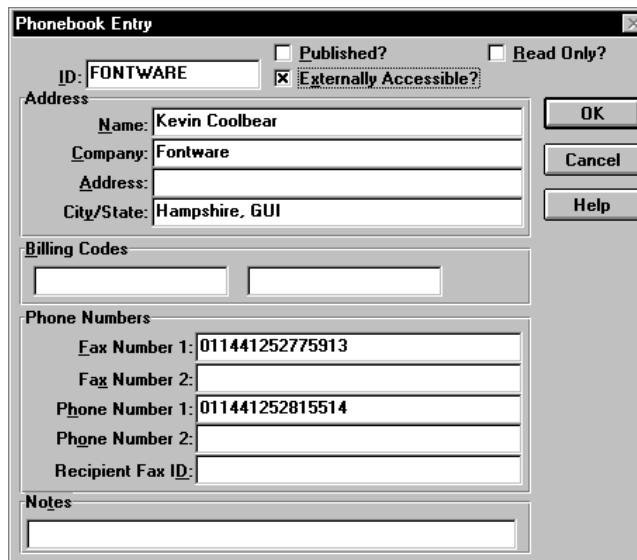
For Windows 95 clients on networks using the Named Pipes protocol, opening very large phonebooks may require as long as one minute per thousand entries

Organize your phonebook with two types of entries: individuals and groups. Individual entries store data about single individuals. Group entries are groups of related individual entries. You may create as many individual entries and as many groups as you want in order to manage your records efficiently.

To return to the FaxUtil mailbox from the phonebook, press the **Phonebook** button on the toolbar again or select **Full Fax List** from the **List** menu.

Creating Individual Entries

To create an individual entry, switch to the **Phonebook** screen, then choose **New Individual** from the **Phonebook** menu or press the [Insert] key. Complete the fields in the **Phonebook entry** dialog. The **ID** field is the only required field and must contain a unique code assigned only to that record. You can use any unique string of letters, including the person's name. For example, if you are creating an entry for Ted Green you might associate it with the ID "TED."



Adjacent to the **ID** field is the **Published** check box. If you toggle this option, anyone can see this phonebook entry when they switch to your mailbox. If you leave the box unmarked, the entry is private and only you can access it or view it. If you mark the entry as **Read-Only**, it cannot be edited by anyone other than you, whether it is a private or published entry. You can also toggle the **Externally Accessible** field to flag the entry as exportable to any other system which may be integrated with RightFAX.

You can also create a new phonebook entry by pressing the **Add Entry** button in the **Fax Information** screen. All the information that you entered in the **Fax Information** screen will automatically be entered in the phonebook fields. You are only required to supply an ID code for this new entry, and you can edit any field you wish.

Following are the field restrictions for phonebook entries:

<u>Field</u>	<u>Description</u>	<u>Max Length</u>
ID	Type a unique ID code. This ID will be used to refer to this entry, however, it will not appear in the actual fax.	17 characters
Name	Type the recipient's name.	59 characters
Company	Type the recipient's company name.	59 characters
Address	Type the recipient's street address. This information will not appear on the fax.	59 characters
CityState	Type the recipient's city and state.	59 characters
Billing Code 1 & 2	Type the code(s) associated with this recipient/fax for billing or tracking purposes. This information will not appear on the fax.	15 characters
Fax # 1 & 2	Type the recipient's fax number in the same format you would input if dialing manually, i.e. 1-800-111-9990 (toll free call) or 555-1111 (local call). If you enter two fax numbers, RightFAX will try both numbers, alternating for a total of five tries until it succeeds on one of the numbers.	31 characters
Phone # 1 & 2	Type the recipient's phone number, if desired.	31 characters
Notes	Type any additional information about the recipient. This information will not appear on the cover sheet and is for your information only.	127 characters

Creating Group Entries

To send a fax to a number of different people, without having to enter each individual recipient, create a group and address the fax to that group. Group names and individual entries appear the same on the phonebook display. Like individual entries, group entries can be made private or published. RightFAX will automatically extract individual recipient information from that group and send the fax to all of the members.

Phonebook groups may contain up to 3000 entries

Groups may be created in two ways:

Select group members from the entries in the Phonebook view, then declare the selected entries a group.

Select group members from existing entries by clicking on the button to the left of the entries in Windows. You may choose up to 24 entries per group.

Once you have selected the phonebook entries you want to include in your group, choose **New Group** from the **phonebook** menu; you will be prompted for a group ID. Enter an appropriate name for your group according to the same rules for entering individual entry names. This ID can be used to send faxes to the group or may be included in another group. For instance, suppose you want to send faxes to all of your sales people nationwide. Further suppose that you have set up five regional groups of salespeople: SWSALES, NWSALES, NESALES, SESALES, and MWSALES. All of these groups could be included in a group called ALLSALES. To send the same fax to all of your salespeople in the entire country just send a single fax to ALLSALES.

Don't create indirectly self-referencing groups, as FaxUtil cannot process them. For example, suppose you have the groups "Sales" and "Marketing." Sales has as its members Marketing, Contracts, and Personnel. Marketing has as its members Advertisers and Sales. When you send a fax to Sales, RightFAX will send the fax to Marketing, of which Sales is a member.

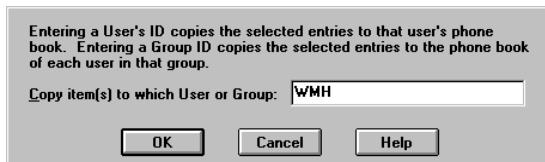


Create a new group and manually fill in the Phonebook ID's of each group member.

Create a group by choosing **New Group** from the **Phonebook** menu before any entries have been selected. In the **Group Phonebook Entry** dialog box, enter a group ID and specify whether this group is published or private just as you would for an individual phonebook entry. Next, enter up to 24 ID's of entries you want to include in this group. Group members may be either individual entries or other groups.

Copying Entries

The **Copy** command on the **Phonebook** menu allows you to transfer one of your entries to another fax user on the network. Highlight the entry which you want to copy, select **Copy** from the **Phonebook** menu, then enter the user's ID or the group's ID when prompted.



Using Phonebooks to Send Faxes

There are four ways to use phonebook entries to send faxes:

<TO_NAME> Embedded Code

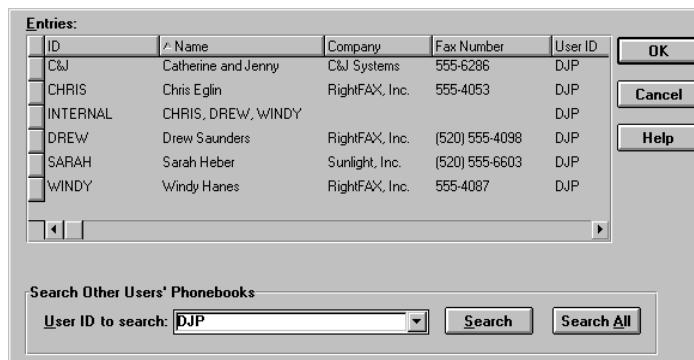
You can use the RightFAX embedded code <TO_NAME:ID> where ID corresponds to a phonebook ID, to fill in the fax recipient information. If you enter a name that is not a valid ID in the TO_NAME: embedded code, only the "To Name:" blank will be completed for you on the cover sheet. For example, suppose your sales manager is Ann Thomas and you create a phonebook entry for her with the ID "Ann." If you use "Ann" (<TO_NAME:Ann>), instead of her full name, FaxUtil will not only fill in her name for you, but her fax number and any other information in her phonebook entry as well.

You can also use embedded codes to use another user's phonebook entries. To use an entry from someone else's phonebook, the embedded code must take the form <TO_NAME: userID!phonebookID>. For instance, assume that your coworker, Ruby Smith, has the RightFAX user ID "RUBY." Further, suppose that she has an entry in her phonebook for Mike Jones under the phonebook ID "MJ." Providing the phonebook entry is complete and accurate, the only code you would need to insert into your document is: <TO_NAME: RUBY!MJ>. (For more information on embedded codes, see Chapter 3, [Creating and Sending Faxes](#).)

FaxUtil Phonebook Lookup Feature

You can use the **Phonebook Lookup** feature to access your own or another user's phonebook entries. You must be in the **Fax Information** screen to use this function.

Press the **Phonebook** button. By default, your phonebook entries will be displayed. Highlight the desired entry and click **OK**. The entry will be inserted in the appropriate fields of the **Fax Information** screen. You can also use other user's published entries as your own. In the **User ID to search** field, click the drop-down list to display all of the users on your network. Select the desired user and click on the **Search** button or press Enter. The published phonebook entries of that user will be displayed. You can also use the **Search All** button to display the published phonebook entries of all of the users on your network.



When using an ID code, be sure that the Phonebook entry contains the minimum amount of information required to send a fax. If all required fields are not completed with valid information, RightFAX will hold the fax with the status "Info Not Complete." In such cases, you must use FaxUtil to complete the missing information.

Phonebook ID's in the To Name field of the Fax Information Screen

You can type a phonebook ID in the **Name/ID** field of the **Fax Information** screen and press TAB. The rest of the fields will automatically be completed with the phonebook entry information.

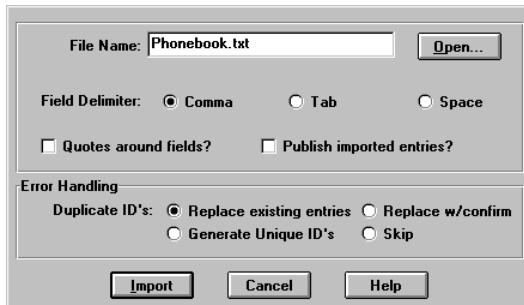
If you want to use an entry from another user's phonebook, you can enter that person's user ID followed by an exclamation point and the phonebook ID in the **Name** field of the **Fax Information** screen. Press TAB to automatically complete the fields. Neither the phonebook ID or user ID is case sensitive, but you must enter the exact, complete ID for it to work.

Phonebook ID's Through the RightFAX PowerBar or Printer Drivers

You can use phonebook ID's in the **Fax Information** screen to address your fax when you use the RightFAX PowerBar or Printer Drivers to send your fax to the fax printer.

Importing Phonebook Entries

RightFAX can import phonebook entries from an existing database or file outside of the RightFAX program, saving you considerable time and effort. To do this, choose the **Import** option in the **Phonebook** menu and complete the **Phone Import Specification** dialog box with information about the source file of your phonebook data.



The first field, **File Name**, is used to specify the name of the file that contains the import data. This file must be a pure text file – it cannot be a specially formatted file such as the type created by a word processor. You can, however, use a word processor to create an import file as long as you save the file as plain text or ASCII with a “.TXT” file extension.

An additional consideration in setting up the import file format is whether or not the strings should be enclosed in quotation marks. A string (short for “string of characters”) is a computer term for a line of text – this sentence, for example is a string. When some programs export textual data (strings) they put them in quotation marks so the data can easily be identified as text. If the program you are taking your phonebook information from does this, you will need to toggle the **Quotes Around Fields** box.

Finally, you must specify to RightFAX which phonebook fields are to be filled. Do this using a field specification line, which is a line of phonebook field names. The field specification line must be the first line of the file you are going to import. The valid field names, the maximum length of entries, and a sample specification line are given below:

Sample Field Specification Line:

“ID”, “Name”, “Fax1”, “Company”, “CityState”
“BOB”, “Bob Jones”, “444-3333”, “ACME”, “Tucson, Arizona”

The ID field is required.

All other fields are optional.

Phonebook Field Code Length Limits:

<u>Field Code</u>	<u>Maximum Length</u>
ID	17
Name	59
Company	59
Address	59
CityState	59
Fax1	31
Fax2	31
Voice1	31
Voice2	31
BillCode1	17
BillCode2	17
Notes	128

If there is an empty field in the import file, the import will fail. For example: "Bob", "", ... will fail. "Bob", " ", ... will succeed.

The rest of the file must contain phonebook entries, with data items arranged in the order of the fields in the field specification line and one phonebook entry per line. Each data item must be separated by one or more spaces.

FaxUtil only allows one phonebook entry to be associated with a given phonebook ID. For this reason, you need to give FaxUtil instructions on how to handle any duplicate records it encounters in your import file. A duplicate record is a phonebook entry that has the same ID as another entry in the import file. FaxUtil gives you four ways to handle duplicate records: **Skip**, **Replace**, **Replace w/Confirm**, and **Create New ID**. **Skip** means that any phonebook entry found in the file with an ID that has already been used is ignored. In contrast, the **Replace** option tells FaxUtil to use the entry from the file to replace a phonebook entry with the same ID. **Replace w/Confirm** is a combination of **Skip** and **Replace**.

If you choose **Replace w/Confirm** when an import record is found with the same ID as an entry already in the phonebook, FaxUtil will ask if you want to replace it. If you respond yes, the import record will overwrite the existing phonebook entry; if you respond no, the import record is ignored. The problem with all three of the above options is that they force you to choose between one or the other – what if you want both? You will need to **Create a New ID**; when a duplicate record is encountered, a number is added to the end of the ID to distinguish it from the entry already using the ID. For example, suppose you have an entry in your phonebook for Jack Hayes with the ID “HAYES.” Now imagine you are importing data from a file that contains a listing for Lisa Hayes, also with the ID “HAYES.” With the **Create New ID** option enabled, when the record for Lisa Hayes is imported into your phonebook, FaxUtil will give it the ID “HAYES1.” If Lisa’s cousin Mary, is also in the import file with the ID “HAYES,” she will be imported as “HAYES2.”

As with manually created phonebook entries, imported entries can be published or unpublished. By toggling the **Publish New Entries** box, all entries imported from the file will be published; otherwise none of them will. If you only want some of the entries published and the rest unpublished, you have two options. The easiest way is to create two separate import files: one for published entries, the other for unpublished entries. The alternative is to import all as unpublished and manually edit each entry you want published, or visa versa.

Deleting Entries

You can use the **Delete** button in the toolbar, select **Delete** from the **File** menu, or press the Delete key to delete a phonebook entry or a group of entries. RightFAX will ask for confirmation to protect against accidental deletion.

Printing Entries

You can print phonebook entries by selecting **Print...** from the **Phonebook** menu. Set the parameters and select **OK**.

ODBC Phonebooks

RightFAX allows connectivity to your ODBC databases to leverage your existing contact database information. This is especially useful for sending fax broadcasts to large numbers of recipients. There is no need to replicate your database information or create awkward database scripts to retrieve the information you need.

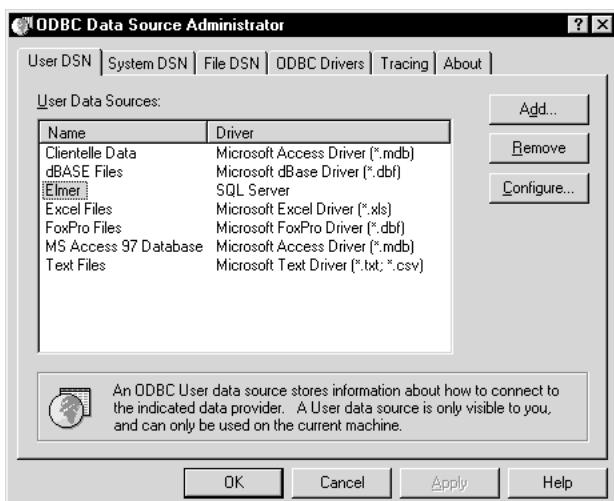
Configuring ODBC Phonebooks

There are two parts to configuring ODBC connectivity: general ODBC configuration and RightFAX ODBC configuration. Each workstation must be configured individually for both types of ODBC information.

ODBC Configuration

Because every database is different, we will not provide specific instructions for configuring the ODBC drivers on your workstation. However, we can provide a few tips. Verify that you have the 32-bit version of ODBC installed on your system by opening your Control Panel and clicking the ODBC applet to display the **ODBC Data Source Administrator** window. Also, note the user ID and password used to log into the database or onto the database server. You will use this ID and password in the RightFAX ODBC configuration.

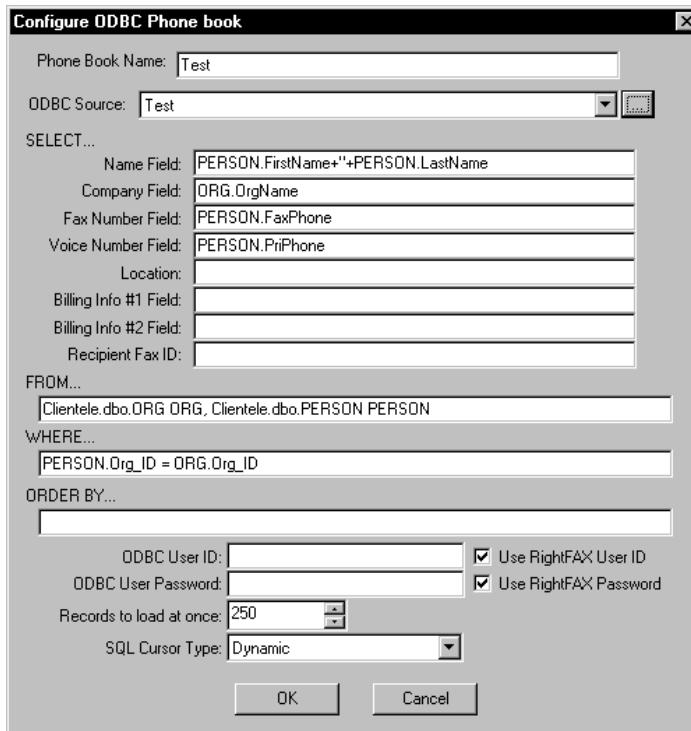
ODBC Phone Books are only available on Windows NT and Windows 95 workstations.



Once you have configured the drivers on your workstation, create a data source under a **User DSN** or **System DSN** in the **ODBC Data Source Administrator** window.

RightFAX Configuration

Start by clicking the RightFAX tray icon in the corner of your taskbar. From the menu, select **ODBC Configuration**. Select the **Add** button next to **ODBC Phonebooks** to create a new ODBC source.



In the **Phone Book Name** field, enter a descriptive name for this contact database. In the **ODBC Source** field, enter the name under which this database appears on the **User DSN** tab of the ODBC control panel.

The next step is to relate the fields of the database to the standard RightFAX contact information fields. For example, the fax number is a required element in RightFAX. In order to automatically complete the fax number field, you must tell RightFAX which database field contains the number. This is done with a simple SQL query. If you are familiar with SQL code, you can create this information quickly and enter it in the **Select** fields. If you are not familiar with SQL code, you should use a tool such as Microsoft Query to generate the SQL code for you, then cut and paste it into the **Select** fields.

Note that you can combine database fields to create a single RightFAX field output. For example, your database may contain separate fields for first, middle and last names. RightFAX has only one name field, in which first and last names are usually combined.

In the **FROM** and **WHERE** fields, enter the SQL information specified by the query results. If you wish to presort the data, you may enter the necessary SQL data in the **ORDER** field. However, RightFAX allows you to sort by column after it retrieves the data.

You should also specify the necessary user ID and password to access the database information. If this ID and password matches those used to log into FaxUtil, you can simply check those fields. If you have a large database, you should limit the number of records loaded at one time in the essence of time.

Use the following example to help configure your RightFAX fields.

Example:

Query SQL output:

```
SELECT ORG.OrgName, PERSON.FirstName, PERSON.LastName
  FROM Clientele.dbo.ORG ORG, Clientele.dbo.PERSON PERSON
 WHERE ORG.Org_ID=PERSON.Org_ID
```

Mapping to RightFAX Fields:

SELECT...

Name Field: PERSON.FirstName+''+PERSON.LastName
Company Field: ORG.OrgName
Fax Num. Field: PERSON.FaxPhone
Voice Num. Field: PERSON.PriPhone

FROM...

Clientele.dbo.ORG ORG, Clientele.dbo.PERSON PERSON

WHERE...

ORG.Org_ID=PERSON.Org_ID

Using ODBC Phonebooks to Send Faxes

Once you have configured your ODBC information, you can access these database records in the PopUp Fax Driver or via the Quick Fax option in the RightFAX tray icon menu.

Select the **Phonebook** button and choose the appropriate ODBC database. You will be presented with a list of records. If you limited the number of records displayed at one time, you will see only that number of records. To view the previous or next increment of records click on the arrows on the far right side of the table.

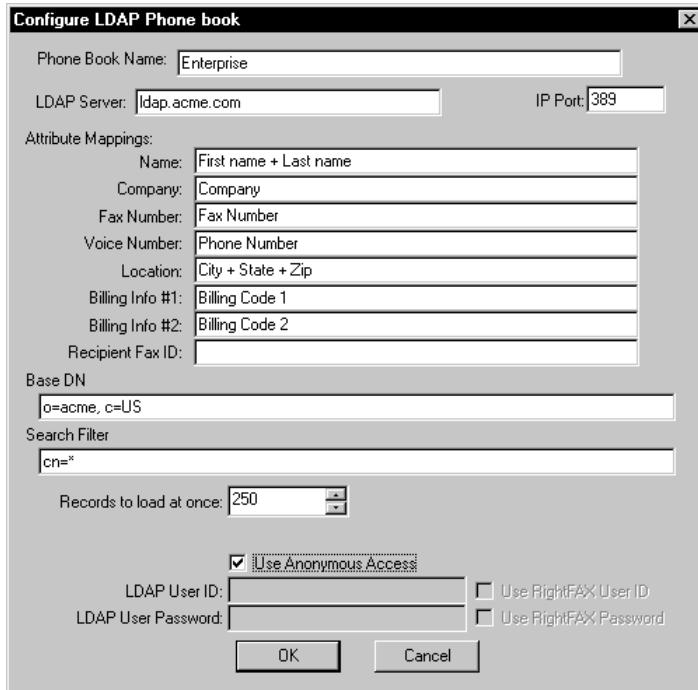
You can sort on any column in the list, however, be aware that the limit of records will be pulled again based on the new sort order. To sort the entire database before displaying the list, use the Order By clause in the Configuration dialog.

Simply highlight one or more records and click OK to send the fax. The same fax will be sent to each of the intended recipients.

LDAP Phonebooks

LDAP Phonebooks are only available on Windows NT workstations

Much like RightFAX's connectivity to ODBC, RightFAX integrates with LDAP (Lightweight Directory Access Protocol) phonebooks. Information stored on LDAP servers can now be retrieved via a "live" connection rather than a static import.



Configuration of LDAP sources is accomplished through the RightFAX Tray Icon menu. Select LDAP Configuration and set up as many LDAP sources as you wish by mapping the LDAP fields to the corresponding RightFAX fields. In addition, you can filter the number and type of entries returned to RightFAX. Once the data has been retrieved, simply select the desired entries and click OK. The address information for each recipient will automatically complete the fields necessary to send the fax(es).

MAPI Phonebooks

RightFAX also integrates with your MAPI-compliant contact lists such as Microsoft Exchange Address Lists and Outlook Contact Lists.

To use MAPI phonebooks, you must have MAPI installed on your machine.

Configuring MAPI Phonebooks

MAPI address books and contact list profiles are automatically created by Exchange, Outlook and other applications. You do not need to configure any MAPI specific information. However, you must be sure that your entries contain fax number information for it to be used in RightFAX.

Using to Send Faxes

Once you have entered the appropriate fax information in your address lists, you can access these records in the PopUp Fax Driver or via the Quick Fax option in the RightFAX tray icon menu.

Select the **Phonebook** button and choose the MAPI phonebooks. After selecting the appropriate MAPI profile, you will be presented with a list of records. You can view all of the lists and address books available on your system. Simply highlight one or more of the records and click OK to send the fax. The same fax will be sent to each of the intended recipients.

Broadcast Faxing

When broadcasting the same document to a large number of people, it's generally better to store it as a library document. As such, it is stored in TIFF Group III format and does not have to be converted again for faxing (i.e. if it is going to be sent to 200 people, you save the time on the server of 200 PCL to TIFF Group III conversions, freeing it to do other tasks.)

RightFAX can send one fax to hundreds or thousands of recipients at a time. In fact, using RightFAX's robust set of embedded codes and ODBC database connectivity tools, broadcasting is easy. The easiest way to broadcast faxes is using RightFAX, ODBC, LDAP, or MAPI phonebooks option in the Quick Fax/Broadcast item in the Tray icon menu. We provide more information and examples for these methods below. If you are very familiar with database scripts and macros, you can use the advanced methods we describe below, however, it is generally not necessary to do so.

Please note that the information in these examples may not apply in every case. Use these scenarios as reference points and use the general format to create broadcasts specific to your needs.

Broadcasting with Phonebooks

There are four broadcasting options that use phonebook information: use ODBC phonebooks; use MAPI phonebooks; use LDAP phonebooks; or use RightFAX phonebooks. Broadcasting with phonebooks is merely a large scale version of sending faxes with phonebooks to a few recipients. Simply follow the instructions described in the previous sections and select all of the recipients at one time rather than small groups of individuals.

Other Broadcasting Methods

You can use embedded codes to do complex broadcast faxing. We have provided examples that anticipate common scenarios. These examples are by no means exact and should be used as guidelines for creating your own routines and scripts based on your specific database.

In the following example, we will assume that a library document with the ID "PROMO1" has already been created. Further, we will be using FoxPro as a sample database program, and we will name the database MYLIST; it has four fields: NAME, FAXNUM, STATE, and COMPANY; and the HPFAX printer is already linked or captured to LPT1. Using the following FoxPro program, you can broadcast the PROMO1 document to everyone in the states of Arizona and California.

```
set talk off
Select * from MYLIST;
  where STATE=="AZ" or STATE=="CA"
  to table TEMP1
set printer to LPT1
set printer on
? "DUMMY TEXT TO FLUSH ANY DATA IN LPT BUFFER"
set printer off
set printer to
if (!used("TEMP1"))
  select 0
  use TEMP1
endif
select TEMP1
SCAN ALL
  set printer to LPT1
  set printer on
  ?? "<libdoc:PROMO1>""
  ?? "<toname:"+temp1.name+">""
  ?? "<tofaxnum:"+temp1.faxnum+">""
  ?? "<tocompany:"+temp1.company+">""
  ?? "<autodelete>""
  set printer off
  set printer to
ENDSCAN
```

Broadcasting with Mail-Merge

Because RightFAX has a rich set of commands which can be placed in any document you print, you can use the mail-merge features of your word processor to create a fax broadcast. The trick with word processors is that each document must be printed as a separate print job to your network print queue. In our example we will use Word for Windows, which requires a macro to print each document as a separate print job.

Below is a sample letter with appropriate RightFAX and Word codes (note that the merge fields are shown as they would appear if the **Field Codes** option on the **View** menu is enabled):

```
<formtype:lthd><toname:{mergefield Name}>
<tifaxnum:{mergefield FaxNumber}>
<tocompany:{mergefield Company}>

{mergefield Name}
{mergefield Company}
{mergefield Address}

Dear {mergefield Name}
```

We would like to introduce you to the ACME widget. This widget is the leader in safety and low cost. We are offering our distributors the chance to evaluate our widget for the low cost of only \$400,000.

Bob Smith
President

If the above letter was merged with a list of ten names to create a new document, Word would have created a document with ten copies of the letter, each separated by a section divider. Normally you could just print the new document and all ten sections would be output as a single print job to a network print queue. However, if you were to print the document this way to the RightFAX fax printer, you would get one fax with ten pages and it would be addressed to the person referenced by the last set of embedded fax codes.

For Word to output ten separate print jobs, you can use this Word 97 macro:

```
Public Sub MAIN()
  Dim TotalSec, i, F$
  WordBasic.EndOfDocument
  TotalSec = WordBasic.SelInfo(2) - 1
  For i = 1 To TotalSec
    F$ = "S" + Str(i)
    WordBasic.FilePrint Type:=0,
      NumCopies:=1, Range:=3, From:=F$, To:=F$
  Next i
End Sub
```

If you use a different word processor, or a different version of Word, you will have to modify this macro to meet your application's requirements

The above macro first counts the number of letters to print by jumping to the bottom and obtaining the current section number (we subtract one because there is always an extra section break inserted during the **Merge To New Document** operation.) Next, the macro starts a loop, executing a print range for the "S#" to "S#" where # is "1" through the total number of sections. Since the range is prefixed with "S," the print command prints a specified section, no matter how many pages are in each section.

In the example above, the Word document itself is broadcasted. In some cases, you may want to send a RightFAX library document to a group of people. Normally, this can be done if the group is set up in your RightFAX phonebook, but it may be difficult and time consuming to do so, especially if you already have a database with the names and fax numbers entered. In such a case, you should use a Word mail merge to create your fax broadcast. For example, let's say that you have already created a library document with the ID "PROMO1." The following Word document could be used to send that document to a list of people:

```
<libdoc:PROMO1><toname:{mergefield Name}>
<tifaxnum:{mergefield FaxNumber}>
<tocompany:{mergefield Company}>
<note: This is the first coversheet notes line>
<note: This is the second.>
```

Using the print macro given previously, you could broadcast the library document PROMO1 to a group of people.



Appendix A: Error and Status Messages

Error and Status Messages

A new fax has arrived for (user ID) from remote ID: (remote ID)

Another user has designated you to be their alternate for notification and they have received a new fax.

A new fax has arrived for (user ID) which hasn't been viewed or printed

A member of the group for which you are the RightFAX administrator or alternate administrator, has received a fax and has not viewed or printed it within one hour of receipt.

A new fax has arrived from remote ID: (remote ID)

You have received a new fax. You will continue to be notified for one hour (or other period specified by your administrator). If you do not view or print the fax, your group's administrator will be notified. If he or she does not print the fax, your group's alternate administrator will be notified.

An outgoing fax is ready for previewing

The fax you requested be **Held for Preview** has been processed by RightFAX and is waiting in your mailbox. You must select **Release** to start the sending process.

Answer tone detected

RightFAX could not connect with the remote (receiving) fax machine due to communication errors between it and RightFAX.

Bad FCS Information

Incorrect information was entered on the cover sheet (via the **Fax Information** screen or embedded codes).

Bad Formtype

You have specified a form that does not exist or is corrupt in the **Fax Information** screen or through embedded codes.

Bad Phone Number

You entered an incorrect or nonexistent fax phone number.

Bad Signature Code

The signature code is not recognized as a valid signature identifier because it is corrupt or does not exist.

Call answered before one full ring

RightFAX did not receive a normal-length ring-back signal from the phone company's central office.

Can't access scans

RightFAX can't access the documents you scanned with the scanner.

Carrier not detected

RightFAX did not detect a dial tone when it tried to dial out.

Command time exceeded

There are timing-related errors, possibly when the fax card waits for or sends a command (T30 protocol handshaking commands) and doesn't get a response within a given period of time.

Command time too short

There are timing-related errors, possibly when the fax card waits for or sends a command (T30 protocol handshaking commands) and doesn't get a response within a given period of time.

Command timeout

There are timing-related errors, possibly when the fax card waits for or sends a command (T30 protocol handshaking commands) and doesn't get a response within a given period of time.

Communications-line failure

The fax card was unable to make a valid connection with the remote machine.

Conversion Failed

RightFAX was unable to convert your document to Group III format.

Dial failure or no dial tone

RightFAX cannot detect a dial tone because there is a problem with the phone line or the fax card is configured incorrectly.

Duplicate

The fax is a duplicate; it has been forwarded to you by another user.

Equipment busy tone detected

The remote (receiving) fax machine's phone line is busy.

Fax Discarded

RightFAX threw your fax away. Contact your administrator.

Fax number busy

RightFAX has tried to send your fax the required number of times (default=5 times) and each time the phone number was busy.

Fax to (name) abandoned, too many retries

RightFAX will try to successfully send your fax a specified number of times (determined by the administrator) then quit trying. The default value is 5 tries.

Fax to (name), (error)

Your outgoing fax encountered the error listed. (See the error listed for more information.)

FCS Create Failed

The cover sheet of your fax could not be created due to a corrupt or incompatible cover sheet format.

Function not implemented

An operation was attempted that is not currently supported by your fax card software.

G2 Fax Machine

You have attempted to send a fax to a Group II machine, rather than a Group III machine.

Held for Preview

You have specified in the Fax Information screen or through embedded codes that you want to preview this fax before sending it. You must select **Release** from the **Fax** menu to start the sending process.

Human Answered

RightFAX detected an unknown sound after it dialed the fax number. The unknown sound could be a human voice, recording, or line noise.

Illegal line number

You have attempted to send a fax on a fax channel that does not exist.

Illegal option in call

This error could occur if an invalid parameter is given for one of several different commands, including: LOG, DEBUG, XFER, SEND.

Illegal parameter value

This error could occur if an invalid parameter is given for one of several different commands, including: LOG, DEBUG, XFER, SEND.

Illegal Sig. Use

You have included a signature in your fax that you are not authorized to use.

Imaging error encountered, fax abandoned

RightFAX was unable to convert your document to Group III format for transmission, and so quit trying.

In Conversion

RightFAX is converting your document to fax format for transmission.

In Validation

The signature and/or billing codes in your fax are being validated against the RightFAX database.

Info Not Complete

You have not completed all the required fields (in the **Fax Information** screen or through embedded codes) for RightFAX to send the fax.

Initial Processing

RightFAX is checking your document for embedded codes and counting the number of pages in your fax.

Invalid Billing Code

You have entered a billing code that is incorrect or does not exist.

Invalid Embedded Code

You have included a misspelled, incomplete, or nonexistent embedded code in your fax.

Line in Use

RightFAX was not able to send your fax because there were no outgoing phone lines available.

Loop current detected

When RightFAX attempts to go off-hook to send a fax, it finds that the phone is already off-hook. This can occur when two devices are sharing a phone line and attempt to use it at the same time. It might also be a fax card configuration error.

Loop current failed

The fax card did detect current on the line, but did not detect a valid value for LOOP CURRENT.

Loop current not detected

The fax card was looking for LOOP CURRENT before it attempted to dial the fax number, but didn't find any.

Network congestion detected

The network may be running inefficiently and causing traffic, or an invalid fax number may have been dialed.

Network high and dry (no ring)

The fax card does not detect any type of telephone interface available. This is a very serious error; contact your RightFAX administrator immediately.

No Answer at Fax #

The fax machine at the receiving end didn't answer or a wrong number was dialed.

No answer tone detected

The phone is ringing at the destination, but the fax machine is not answering within the specified time. This is especially prevalent in international calling when it can take up to a minute to connect to the remote station.

Non-G3 Modem Detected

RightFAX has detected a non-Group III fax modem on the remote (receiving) fax machine, and cannot communicate with it.

OCR Error

An error occurred while a document was being sent to or was at the Optical Character Recognition module of RightFAX.

OCR in Process

Your fax has been queued and is being processed by the OCR module.

OK

RightFAX has successfully sent your fax over the phone lines. This does not guarantee successful receipt of the fax at its destination.

One of your outgoing faxes needs attention

You have not completed all the required fields in the Fax Information screen or through embedded codes for the fax to be sent.

P2 was not detected at the end of training

This is a training error indicating a performance problem with the fax server and the number of fax cards that it contains.

Phone Line Problems

There is a problem with the phone lines at the fax server.

Poor Quality

There was too much line noise for the fax to be transmitted correctly. The fax may have been sent, but it may be difficult to read.

Printing

Your fax is printing.

Printing Error

An error occurred while printing.

Protocol reject message

This is a generic protocol error code that could have several meanings. In general, your fax card is having difficulty talking to the remote fax machine because it is not getting the signals it expected.

Protocol timeout

This is a generic protocol error code that could have several meanings. In general, your fax card is having difficulty talking to the remote fax machine because it is not getting the signals it expected in the appropriate time frame.

Queued for OCR

The fax has been queued and is waiting for the OCR module to convert it.

Queued for Printing

The fax has been queued and is waiting to be printed.

Ringback signal detected

A ringback signal was detected when it should not have been. This may be due to interrupting a call in-process on a shared line, or could be caused by a lot of noise on a T1 phone line.

Ringback, but no answer tone

The phone rang at the destination, but it was never answered. This might be because the receiving fax machine is off-line or unable to receive faxes.

Ringback, then busy condition

The fax number dialed went off-hook, then went on-hook very quickly, generating a fast busy signal.

Scheduled for Send

Your fax was successfully converted to the RightFAX Group III format and is now being sent to the fax card to await sending. If you specified a date and time to send the fax, RightFAX will wait to send it until then.

Scheduling Failed

Your fax was converted correctly, but it couldn't be correctly queued to be sent.

Sending

RightFAX is transmitting your fax.

Sending fax to (name) at (faxnumber)

Your fax is being sent to the name and fax number specified.

Sig needs Authorization

You must be authorized to use the signature you have included in your fax.

Thermal Record

You have recorded a fax that was sent or received on a conventional fax machine for database purposes only.

Training Algorithm detected FSK

This training error indicates a performance problem with the fax server and the number of fax cards it contains.

Training Algorithm found on PN

This training error indicates a performance problem with the fax server and the number of fax cards it contains.

Tx/Rx Error

This transmission/reception error indicates that the receiving fax machine was experiencing difficulties or excessive line noise.

Unknown Error

Undetermined error.

Unknown Error Code

Error condition is not known.

Unknown Status Code

An unknown status code has been returned to RightFAX from your fax card.

Voice response to call

RightFAX detected a sound that it didn't expect after it dialed the fax number. The sound could be a human voice, recording, or line noise.

Waiting for Conversion

RightFAX is busy with another process and has queued your fax to be converted.

Waiting to be Sent

The fax has not yet been scheduled for faxing.

Your fax has been successfully sent to (name) at (faxnumber)

Your fax was successfully sent over the phone lines. This does not guarantee successful receipt of the fax at its destination.

Your outgoing fax contains an invalid billing code

You have either not entered a required billing code, or entered one that does not exist.



Appendix B: Troubleshooting

Appendix B: Troubleshooting

Although RightFAX is highly integrated with your network, determining the source of configuration and installation problems can be easy. Included in this section are the most common situations encountered in different stages of RightFAX operation, along with possible solutions.

To help track errors, all RightFAX server modules can be configured to record a detailed log of program information in the Application EventLog. When a problem occurs, this should be your first source of information. Each entry will be attributed to the RightFAX Server Module, RightFAX Database Module, RightFAX BoardServer Module, or RightFAX Work-Server Module.

Problems Specific to Sending Faxes

After printing to a fax print queue, the fax never appears in your fax mailbox.	<ul style="list-style-type: none">• There was an error moving the print job from the network spool directory to the \RIGHTFAX\OUTGOING directory (look in the Application EventLog under RightFAX Server Module for a specific error message).• The print job contained a <WHO> code (the fax may have been moved into the mailbox of the user specified by the WHO code).• The user used the wrong print queue or does not have the necessary network permissions to access the print queue.• The user is not linked to a fax print queue.• The fax server is not running, has died, or some/all of the RightFAX Services have stopped.• The fax server is low on disk space. The server stops processing new faxes when free space drops below 50 MB.
Faxes are left with the status "Waiting for Conversion" or "In Conversion"	<ul style="list-style-type: none">• There is no RightFAX WorkServer Module running, or the running RightFAX WorkServer Module is not configured for the kind of conversion in question. For example, you may be sending PostScript print jobs to a RightFAX WorkServer Module that is configured to perform only PCL5 conversions.• Someone has sent a very large fax job and it is taking the fax server a long time to convert it. You can add additional WorkServers to redistribute the rest of the jobs.
Faxes failed with "ED: Conversion Failed"	<ul style="list-style-type: none">• Examine the Application EventLog under RightFAX WorkServer# Module.• Verify that the document you are printing can actually be printed on a real LaserJet III (the printer driver your software is using may be out of date or contain bugs).• Try using a LaserJet III printer driver.

Information in embedded codes is not pulled out of the document, and the codes are left on the fax image.	<ul style="list-style-type: none"> The codes were formatted in a font which was rasterized by the client workstation (i.e. the actual text of the code never appeared in the print output). Make sure the codes are formatted in a native printer font. The codes are formatted in such a way that the code text is not contiguous in the document (i.e. the word-processor split the code across a line or had to change character sets to output the '<' and '>' characters).
Faxes convert OK but are not sent, i.e. "Phone Line Problems"	<ul style="list-style-type: none"> The Dial Prefix or Postfix parameter is incorrect. The Dial Prefix does not include a leading "," or "w" to wait for a dial tone before dialing (on Brooktrout boards). The phone number or dial prefix did not include the required digits to access an outside line. For international calls, the call took too long to complete. You can increase the CD Timeout value. The phone line is not a standard analog phone line, as would be usable by a Hayes compatible modem. The phone line is not connected to the board, or the line is dead (try dialing out on that line with a regular phone). You may be using an improper cable. Check to make sure that you have the proper phone cables for your fax board type. The fax board may be damaged.
Fax converts OK but never begins to send, i.e. "Held for Preview" or "Info Not Complete"	<ul style="list-style-type: none"> The fax was held for preview and never released. The user should release the fax by using the Fax-Release option in FaxUtil. The cover sheet information is not complete. The user should edit the fax and add values in all required fields (italicized). The fields required for sending a fax can also be changed using FaxAdmin.

Problems Specific to Receiving Faxes

The fax server does not answer incoming phone calls.	<ul style="list-style-type: none">• The RightFAX BoardServer Module is not running.• The phone lines are not plugged in.• The configuration specifies that none of the fax boards will answer phone calls.• The hardware server may have run out of disk space staging faxes to the local drive.• The fax board may be damaged.
The fax server answers phone calls, but the transmitting fax machine always indicates failure.	<ul style="list-style-type: none">• The hardware server may be out of disk space on its local drive.• Verify that no other boards, except fax boards, in the machine are using the same interrupt. This is usually a problem with the lower interrupts (2-9), so try using a higher interrupt.• There is too much noise on the phone lines and the transmitting fax machine disconnects because of errors.• The transmitting fax machine is incompatible with the fax board. This only occurs on rare occasions. Inexpensive fax modems, fax boards, and fax software packages often do not correctly implement the Group III fax protocol.• The transmitting fax machine may be trying to use a proprietary protocol for higher resolution or error correction.• The fax board may be damaged.

The fax server never answers a phone call on a DID trunk.	<ul style="list-style-type: none"> Many DID problems can be diagnosed by the phone company from their offices. Some of the most common are: The RightFAX BoardServer Module is not started. The DID trunk is not activated. The DID trunk is not really a DID trunk. (WARNING! If a phone line which can ring a standard phone is plugged into your DID port on the fax board, you have probably damaged the fax board. This is NOT covered under warranty repair.) The DID power supply is faulty, not powered, has blown a fuse, or is otherwise not supplying current. The tip and ring lines on the RJ-11 jack have been reversed. (WARNING! Do not reverse the leads on the DID power supply line to correct this problem. This will damage the fax board!) The DID line is misconfigured, i.e. Pulse instead of DTMF signaling, Immediate instead of Wink Start, or an incorrect number of digits. The fax board may be damaged. To test hardware and configuration, plug one of the DID cables coming from the board into a standard, non-PBX, analog phone. Pick up the phone and dial 4 or 5 digits. If you hear the digits as you dial them and then hear fax tone, the board is working properly.
Received faxes do not show up in the expected fax mailbox.	<ul style="list-style-type: none"> The DID routing codes assigned in FaxAdmin are incorrect or a DID routing code is duplicated. The DID number on which a fax is received is not assigned to any user (faxes would be going to the ADMINISTRATOR).
File routing and archiving jobs sent to NetWare file servers are not working	<ul style="list-style-type: none"> The NT user that the RightFAX WorkServer Modules are starting as must exist in NetWare and have the same password. This is necessary because every time you start the RightFAX WorkServer and try to access a Novell server, NT will use this user name to login to the Novell server you are accessing.

Problems Printing Faxes

Printing to a Novell print queue does not work.	<ul style="list-style-type: none">• This is necessary because every time you start the RightFAX WorkServer and try to access a Novell print queue, NT will use the user name you defined to log in to the Novell server you are accessing.
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Problems with a Fax Cover Sheet

- Every use of the <NOTETEXT> code represents ONE LINE of the message written in the Add Notes/Comments screen. Therefore, you will need 21 <NOTETEXT> codes on 21 separate lines to make sure that all twenty-one comment lines are placed on the cover sheet. If the comments for a fax are less than 21 lines, the remaining lines will be filled with blanks.
- The <NUMPAGES> code represents the number of body pages, not including the fax cover sheet. That is why FaxUtil shows fax page counts with "Cover + #" notation. The <NUMPAGESC> code includes the cover sheet in the page count.
- The <WHEN_FAXED> code will reflect the time the document was processed by the fax server, not the time it was actually faxed to its destination. It is important to remember this when using the Delay Send feature of RightFAX.
- Do NOT save the word processing document to the file FCS.PCL. The fax server expects a PCL-5 print output file, not a MS Word for Windows document file.
- Do not make the cover sheet more than one page.
- When printing from a Windows based word processor, you should only use native printer fonts to print the embedded codes, i.e. TOFAXNUM and NOTETEXT. Using one of the Windows TrueType or a third party font will cause the codes to be sent as graphic objects and they will not be seen by the fax server. Consequently, the codes themselves will show up on all cover sheets and not the data which the codes represent.
- If you are using Word 97 go to the Tools\Options\Compatibility menu option and choose "Recommend Options for: Microsoft Word 6.0" and then reprinting your document to a file.



Appendix C: Native Document File Formats

Native Document File Formats

The following list shows native document file formats (and supported versions) that can be automatically converted to faxes by RightFAX.

Word Processing Formats:

Generic

ASCII Text	All versions
ANSI Text	All versions
Unicode Text.....	All versions
HTML	Versions through 3.0
Microsoft Rich Text Format	Versions through 2.0

DOS

Microsoft Word	Versions through 6.0
WordPerfect	Versions through 6.1

Windows

AMI/AMI Professional	Versions through 3.1
Microsoft Windows Works	Versions through 4.0
Microsoft Windows Write	Versions through 3.0
Microsoft Word for Windows	Versions through 97
Microsoft WordPad for Windows95	Version 1.0
WordPerfect for Windows	Versions through 6.1

Macintosh

Microsoft Word	Versions 4.0 through 6.0
WordPerfect	Versions 1.02 through 3.0
Microsoft Works	Versions through 2.0

Spreadsheet Formats:

Lotus 1-2-3 (DOS & Windows)	Versions through 5.0
Lotus 1-2-3 Charts (DOS & Windows)	Versions through 5.0
Lotus 1-2-3 (Windows)	Versions through 97
Microsoft Excel Windows	Versions 2.2 through 97
Microsoft Excel Macintosh	Versions 3.0 through 4.0

Microsoft Excel Charts	Versions 3.0 through 7.0
Microsoft Windows Works	Versions through 4.0
Microsoft Works (Mac)	Versions through 2.0
QuattroPro for Windows	Versions through 6.0

Database Formats:

Access	Versions through 2.0
dBASE	Versions through 5.0
Paradox (Windows)	Versions through 1.0

Graphics Formats:

BMP (including RLE, ICO, CUR & OS/2 DIB)	Windows
GIF	CompuServe
PICT1 & PICT2 (Raster)	Macintosh Standard
PCX	PC Paintbrush
DCX (multi-page PCX)	Microsoft Fax
MAC	MacPaint
DRW	Micrografx
WMF	Windows Metafile
TIFF	Versions through 6.0
JPEG	All versions
TIFF CCITT Group 3 & 4	Fax Systems
EPS (if TIFF image is embedded in it)	Encapsulated PostScript
CDR (if TIFF image is embedded in it)	Corel Draw versions 2.0 - 5.0
Binary Group 3 Fax	All versions
WordPerfect Graphics [WPG and WPG2]	Versions through 2.0

Presentation Formats:

Microsoft PowerPoint for Windows	Versions through 97
Microsoft PowerPoint for Macintosh	Version 4.0
Freelance for Windows	Version 2.0



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