FAXCOM Client
User's Guide

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Notice

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Chapter One: Getting Started

Overview

The FAXCOM Client is a standalone application for sending and receiving faxes. It is organized similarly to an email Inbox, with folders and subfolders in which to store your sent and received items.

You may also be given Share Rights to other fax user accounts, with the specific fax functions you can perform determined by the specific permissions you have been given to the user account. Refer to Chapter Four for information on performing fax functions as a user with Share Rights to another user account.

The FAXCOM Client now includes a Viewing Pane for viewing the contents of a received fax without having to open it. You simply click the received fax item to view its contents in the Viewing Pane, which you can position either on the Bottom or on the Right. You can also preview an outgoing fax in the Viewing pane (or in the configured fax viewer) before it is actually transmitted by selecting the **Preview** checkbox on the Send Fax dialog when you create the outgoing fax.

You can launch the FAXCOM Client in two ways:

- By selecting *Start…Programs…FAXCOM…FAXCOM Client*.
- By working within a Windows application such as MS Word, and selecting *File…Print…Biscom Fax Printer* in order to fax the application output. You are then automatically transferred to the FAXCOM Client Send Fax dialog in order to address and send the fax.

You can do all of the following with the FAXCOM Client:

- Specify your options for using the FAXCOM Client (Chapter One).
- Organize faxes within folders and subfolders (Chapter One).
- Send faxes, which includes previewing the fax before it is actually transmitted (Chapter Two).
- Resend a failed/saved fax from a Sent fax folder (Chapter Two).

- Receive faxes, which includes viewing the fax, forwarding the fax, sending the fax to a fax recipient, sending the fax to a mail recipient, adding a note to the fax entry, and getting the next unread fax (Chapter Three).
- Perform fax functions within a user account to which you have been given Share Rights (Chapter Four).
- View and manipulate the received fax within Biscom's fax viewer, the FAXCOM Viewer (Chapter Five).
- Manage your outgoing faxes in the Pending Queue and view the Activity Log (Chapter Six).
- Create a phonebook of fax recipients (Chapter Seven).
- Use the Archive function, whereby you can send folders of faxes either to a network location or a CD, and then later restore (i.e., access) the archived faxes (Chapter Eight).
- If so configured, use additional FAXCOM Client tools: the Advanced Fax Routing utility, for creating rules that automatically route incoming faxes; and the Mail Merge utility, which enables you to merge and fax customized documents prepared from a main document and a data source. You can also set an Out-of-Office flag for rerouting received faxes – in the event an Advanced Fax Routing rule exists to execute that action. (Chapter Nine).

Logging in to FAXCOM Client

Note: Logging in to FAXCOM Client – with or without a password – applies to FAXCOM Suite for Windows users only. It does NOT apply to FAXCOM for NDS FAXCOM Client users.

When you log in to FAXCOM Client, you specify the location on the network where your administrator has installed the fax service software, and the name established for you to use the service. Your site may also require you to enter a password to access the fax service. (If appropriate, you can change your password within FAXCOM Client.)

Do the following to log in to FAXCOM Client:

Select *Start...Programs...FAXCOM...FAXCOM Client* to display the main window (Figure 1-1).

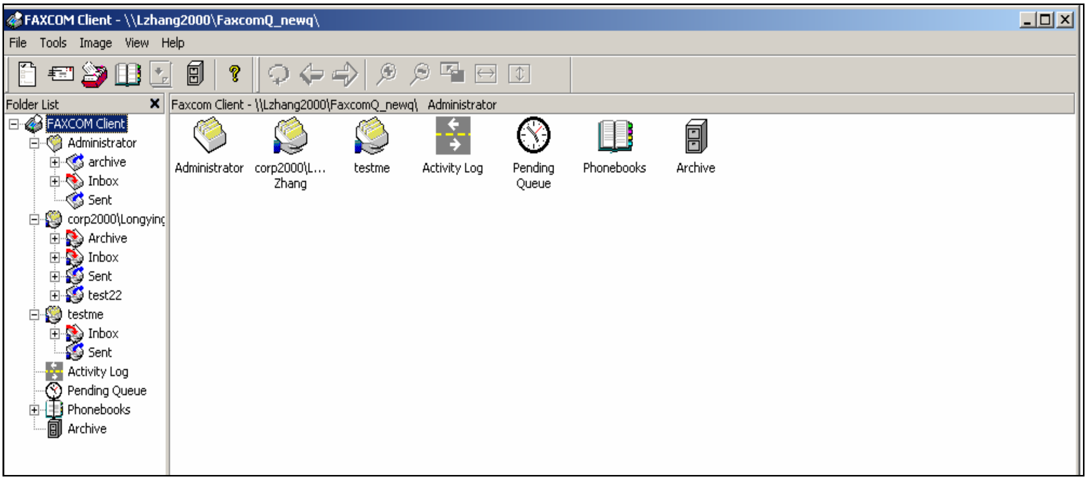


Figure 1-1. FAXCOM Client Main Window

Select *File...Login* to display the Login dialog.

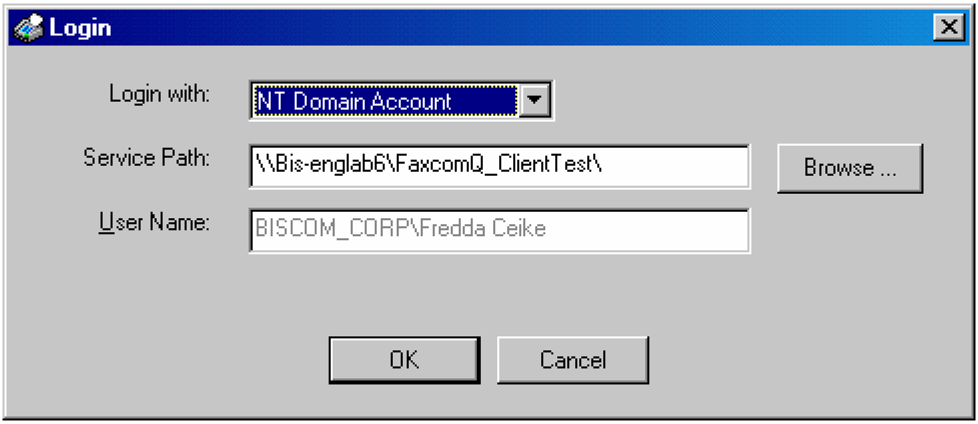


Figure 1-2. Login Dialog

As advised by your fax service administrator, select the appropriate *Login with* option, either:

> **Active Directory Account** – uses the information specified for you in the Active Directory directory service so that no login to the fax service is required.

NT Domain Account – uses the same User Name and Password combination with which you identify yourself when logging into Windows

FAXCOM Account – uses the name specified for you when the fax service administrator added you to the fax service User List

Review the information in the *Service Path* and *User Name* fields. If the fields are blank, consult with your fax service administrator.

To change the information in either, type over the existing information; to search for the correct Service Path, click the **Browse** button. Click **OK** to save the changes.

Changing your Password

Your site may require you to specify a password in order to log in to the fax service. Do the following if it is necessary to change your password:

1. Select *Tools...Change Password...*.
2. In the *Old Password* box, enter your current password; In the *New Password* field, enter the new password; in the *Retype Password* box, enter your new password again; click **OK** to save your changes.

Specifying your FAXCOM Options

FAXCOM options establish your defaults for using the fax service – which you can override for a specific fax from the Send Fax dialog.

You configure fax service options in the following categories:

- Personal Info
- Transmit
- Monitor
- Phonebook
- Viewer/Log Options

You configure your FAXCOM options either by selecting ***Tools…Options*** or clicking the **Options** toolbar button  and configuring each tab. Once you configure the tab, click **OK** to exit the Options tabs or click **Apply** to select another Options tab.)

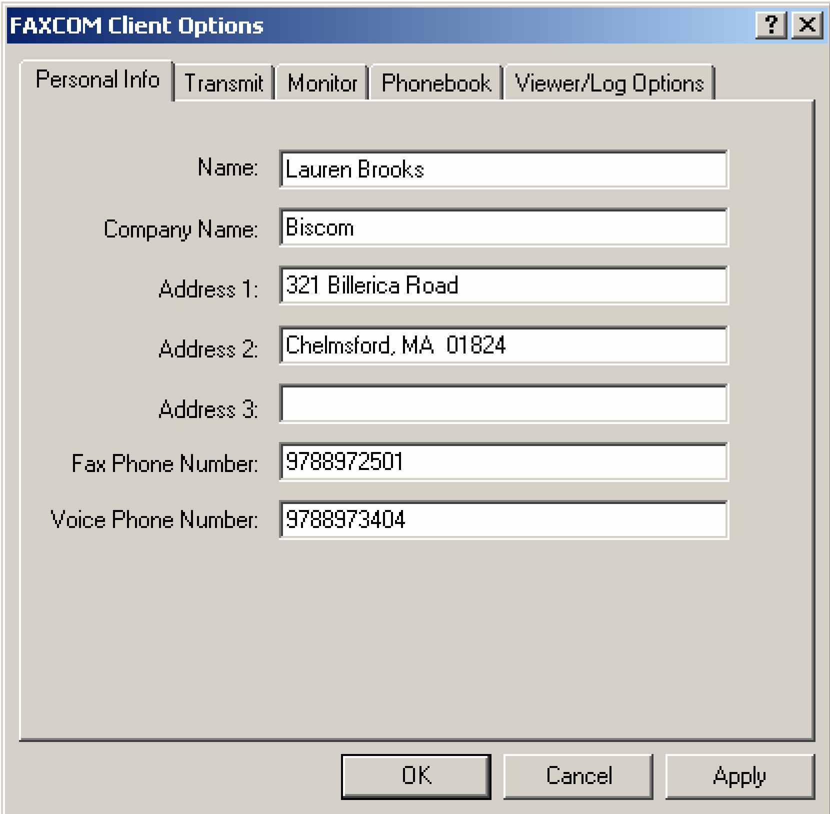


Figure 1-3. Personal Info Tab

Specifying your Personal Information

Personal Info (as shown on Figure 1-3), specifies the default sender information that will be printed on the cover page of an outgoing fax (and which you can override for a specific fax from the Send Fax dialog).

Specifying your Transmit Defaults

Transmit defaults specify the default settings to use when you send a fax.

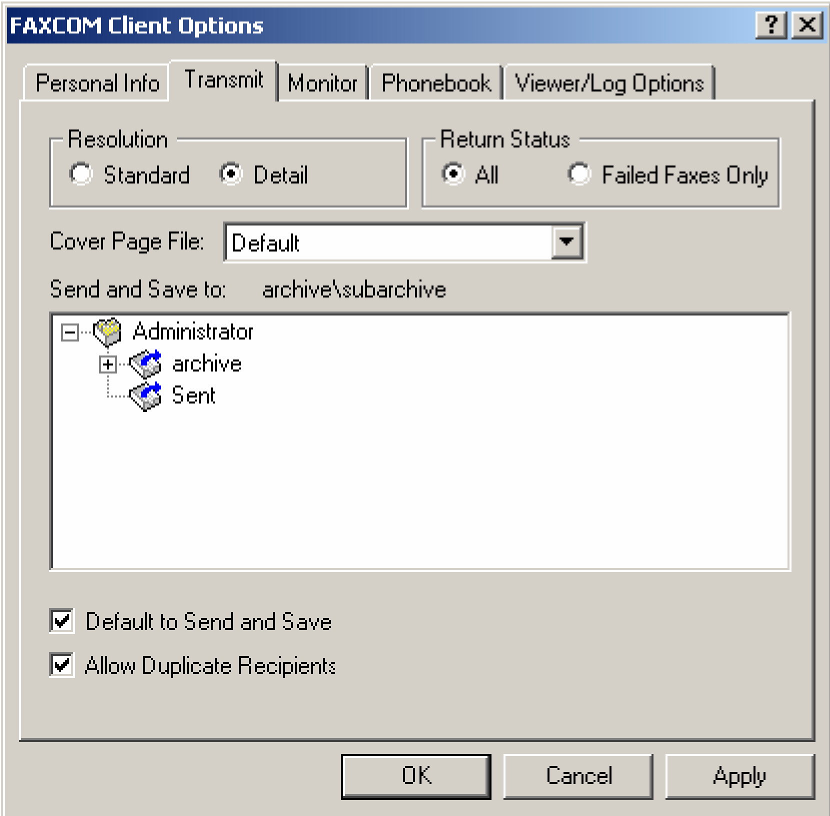


Figure 1-4. Transmit Tab

You specify default settings for the following options:

Resolution – dots per inch (dpi); either *Standard* (200 X 100 dpi) or *Detail* (200 X 200 dpi)

Note: be aware that the Detail image produces a better quality image but takes about twice as long to send.

Return Status – whether you are notified of the status of all outgoing faxes or the failed only

Cover Page File – displays the cover page files your fax service administrator has made available to you; these include the system-wide default cover page (***Default***), as well as any specifically-named cover pages and the **NO Coverpage** selection (if the default is not to include a cover page); if no file is specified, the system-wide default is used.

Send and Save to – displays the top level of your folder listing so that you can highlight a Sent Fax folder  to be the default folder into which you save fax transmissions on the Send Fax dialog

> *Note: Be aware that you can always select another folder on the Send Fax dialog for a specific outgoing fax (and create a new one on-the-fly).*

Default to Send and Save – check to specify that your default preference when sending a fax is to both send the fax and save it in a Folder. If you clear this box, the default is to send the fax only – and you must explicitly check the **Save** box on the Send Fax dialog if you want to save it.

Specifying Monitor Notifications

You specify the fax events for which you receive a notification status (which consists of a workstation beep and a displayed message box) on the Monitor tab:

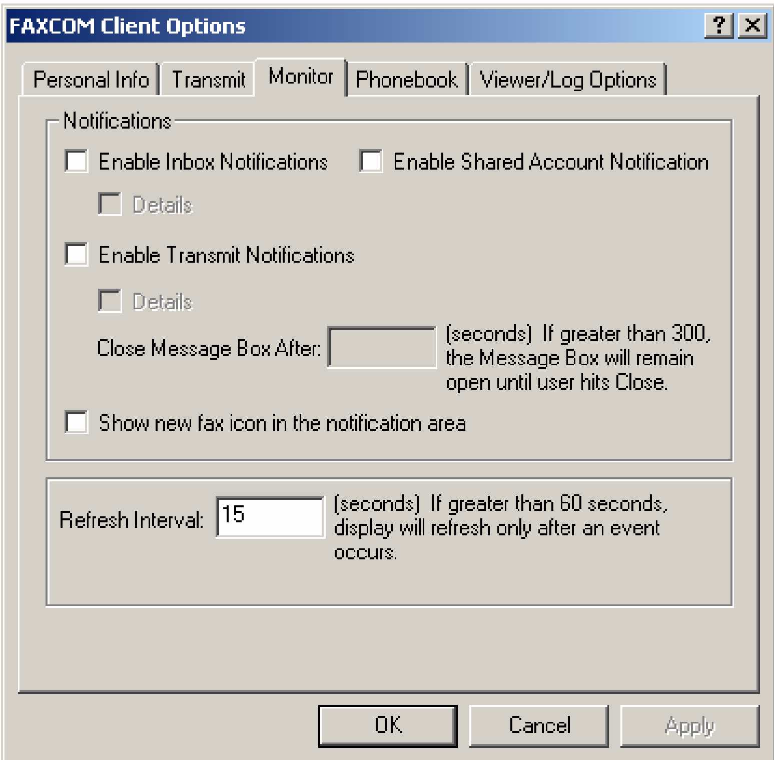


Figure 1-5. Monitor Tab

1. Either click the **Options** toolbar button and select ***Monitor*** or select ***Tools…Options…Monitor***.
2. Check the **Enable Inbox Notifications** checkbox to be notified of the status of a fax you have received. The **Details** box is enabled. Check the **Details** checkbox to specify that the Receive Status message not only notifies you that a fax was received, but also includes such detailed status information as whether the fax was successfully received, the date/time of receipt, the number of pages, the Sender ID, etc.
3. Check the **Enable Shared Account Notifications** checkbox to be notified of the status of a fax that has been received in the **LAST OPENED** shared fax user account to which you have access. (Note that detailed status information is **not** available for faxes received into a user account to which you have Share Rights.)
4. Check the **Enable Transmit Notification** checkbox to be notified of the status of a fax you have sent. The **Details** checkbox is enabled. Check the **Details** checkbox to specify that the Transmit Status message not only notifies you that your fax was sent, but also includes such detailed status information as the fax recipient, pages sent, connect time, retry count, any error code if unsuccessful, etc.
5. In the **Close Message Box After** checkbox, specify the time (in seconds) that the notification message box is displayed. As explained on the dialog, if you specify a time greater than 300 seconds (five minutes), the message box is closed only when you explicitly close it.
6. Check the **Show new fax icon in the notification area** checkbox to specify that an icon indicating receipt of an incoming fax be displayed in the right-hand side of the status bar
7. Specify a time (in seconds) for the **Refresh Interval**, which is the time the FAXCOM Client program will use to update the screen (such as the Received Fax folder that you are viewing). As explained on the dialog, if you specify a time greater than 60 seconds (one minute), the display will refresh only when an event occurs.

Click **OK** or **Apply** to save the information. (Clicking **OK** exits the Options property pages while clicking **Apply** enables you to select another Options property page.)

Note: in order to take advantage of the Faxcom Monitor feature, you must leave the FAXCOM Client program running in the background.

Specifying your Phonebook Type

You can specify that a phonebook be shared with other individuals. Whether you access a Shared phonebook from the Send Fax dialog, or directly from the FAXCOM Client menu bar, the default mode of access is Read-only. If you are to be given Read-Write access to a Shared phonebook, your fax service administrator must configure that access for you.

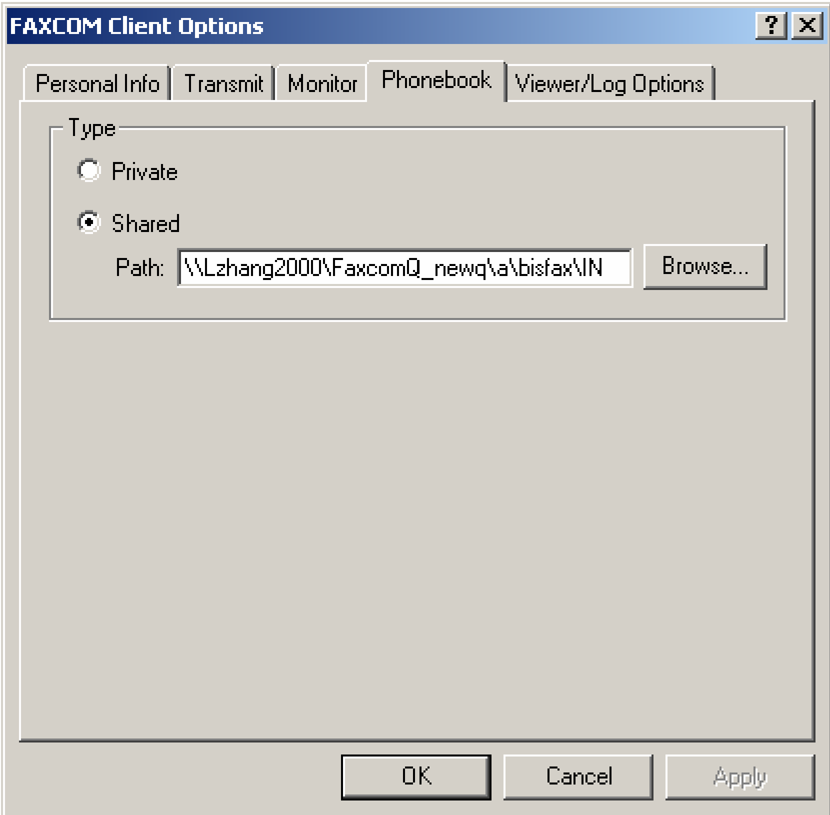


Figure 1-6. Phonebook Tab

- To use a Shared phonebook, either click the **Options** toolbar button and select ***Phonebook*** or select ***Tools…Options…Phonebook***. Check the **Shared** radio button, and in the **Shared Phonebook Path** field, either enter the path to the phonebook as communicated to you by your fax service administrator or select the path from your file listing. Click **OK** or **Apply** to save the information. (Clicking **OK** exits the Options property pages while clicking **Apply** enables you to select another Options property page.)

Once you have selected **Shared** on the Phonebook options tab, it is the Shared phonebook that will be displayed when you click the **Private PB…** button on the Send Fax dialog. To cause your personal Private phonebook to be displayed when you click the Send Fax dialog **Private PB…** button, you would have to access the ***Options…Phonebook*** tab and select the **Private** radio button.

Specifying your Default Fax Viewer and Log Display Options

You can specify the default fax viewer to be invoked for viewing received faxes, as well as whether or not to display the Activity Log and Pending Queue.

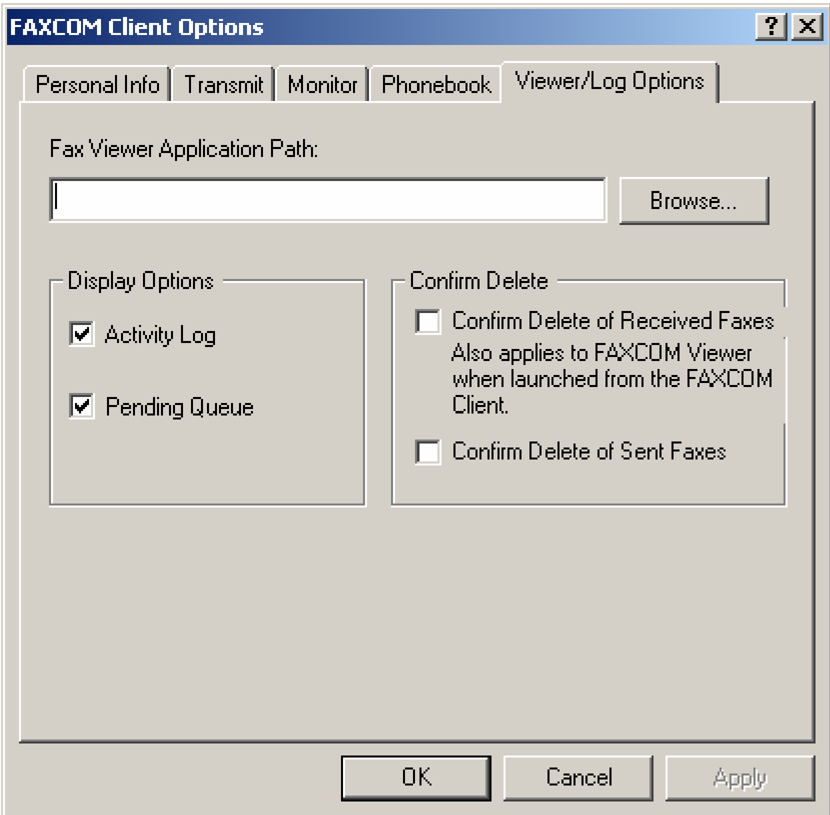


Figure 1-7. Viewer/Log Options Tab

1. In the **Fax Viewer Application Path** field, leave the field blank to use Biscom's FAXCOM Viewer. You can also specify any Tiff viewer of your choice, either by entering its full path (or by clicking the **Browse** button and selecting the appropriate file).

2. In the **Display Options** area, check the Activity Log and/or Pending Queue check boxes to specify that these logs be displayed for your view. (Clear a box if you do not want to display the corresponding log.)

   The Activity Log lists all attempted fax transmissions, both successful and unsuccessful, and any received faxes for the entire fax service.

   The Pending Queue lists all faxes queued for transmission and enables you to see what place your jobs occupy in the queue. You can select your own jobs and make last-minute changes to their transmission status and destination fax number.

3. In the **Confirm Delete** area, if appropriate, uncheck the **Confirm Delete Received Faxes** and/or **Confirm Delete Sent Faxes** checkboxes if you do **NOT** want to receive a message prompting you to confirm your deletions of selected faxes.

Organizing Faxes into Folders and Subfolders

Within FAXCOM Client you can create folders and subfolders in which to store faxes. By default, two folders are already created for you, the Inbox folder to hold received faxes, and the Sent folder to hold return status messages for transmitted faxes, as shown in Figure 1-8.

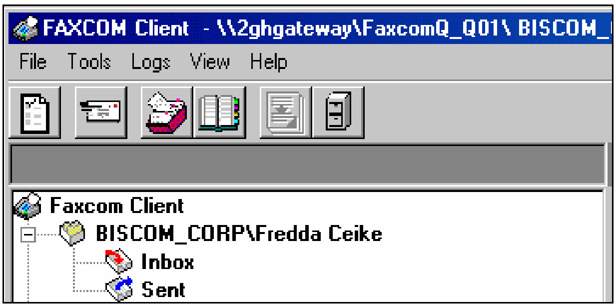
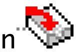
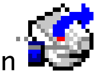


Figure 1-8. Default Folders

When you attempt to create a new folder at the topmost Mailbox level, for example, 

, you are prompted whether the folder to be created is for Received faxes or Sent faxes. Otherwise, you can add only a Received fax subfolder under a Received fax folder, and only a Sent fax subfolder under a Sent fax folder. A Received fax folder is identified with the following icon . A Sent fax folder is identified with the following icon . A Received fax folder to which you have been given Share Rights is identified with the following icon . A Sent fax subfolder to which you have been given Share Rights is identified with the following icon  .

To move faxes from one folder to another, select the faxes as follows, then drag and drop them into the appropriate folder:

> ***To select consecutive faxes***, click the first item, press and hold down SHIFT, and then click the last fax.
>
> ***To select faxes that are not consecutive***, press and hold down CTRL, and then click each fax.
>
> ***To select all faxes***, press Ctrl-A.

In addition to dragging and dropping faxes between folders, you can also press the following key combinations to move selected faxes between folders:

> Ctrl-C to copy
>
> Ctrl-V to paste
>
> Ctrl-X to cut (in order to paste into another folder)

Chapter Two: Sending a Fax and Using a Sent Fax Folder

Overview

This chapter explains the various ways you can send a fax, including resending failed/saved faxes from a personal (*not* shared) Sent fax folder. Sending faxes from a shared user account varies according to your specific Share Rights permissions, as described in Chapter Four.

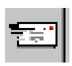
Sending a Fax Overview

You have the following send capabilities:

- Send a brief fax memo
- Send a fax from any Windows application by "printing" the application output to the Biscom Fax Printer
- Send a fax that includes up to 100 attachments, from the following sources:
  - Files selected from Windows Explorer
  - Files opened in any Windows application and “printed” to the Biscom Fax Printer
  - Previously-received faxes stored within FAXCOM Client Received fax folders
- Save an outgoing fax in a Sent fax folder
- Resend a failed/saved fax from a Sent fax folder

Accessing the Send Fax Dialog

You can access the Send Fax dialog in four ways:

- From the FAXCOM Client toolbar, either by selecting ***Send Fax...*** from the ***File*** pull-down menu, or by clicking the **Send Fax**  toolbar button.
- From a Windows application when you "print" to the Biscom Fax Printer.

- From a FAXCOM Client phonebook (either Public or Private) when you select fax recipient users/groups, right-click and select ***Send Fax***.
- From a Received fax folder, when you select a previously-received fax, right-click and select ***Send to Fax Recipient***.

Filling out the Send Fax Dialog

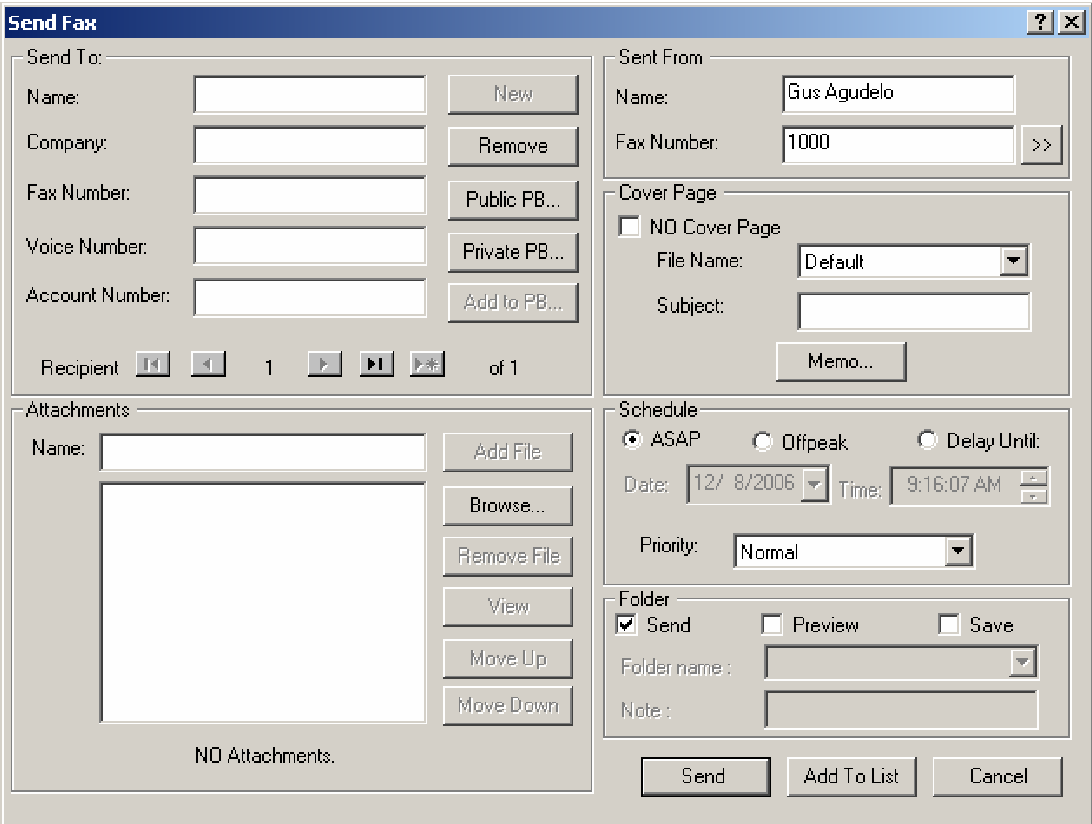
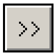


Figure 2-1. Send Fax Dialog

To send a fax, the only information required on the Send Fax dialog is the destination fax number in the Fax Number box **(in addition to the fax contents, which consists either of a cover page memo or a file attachment).**

In addition, when you configured your options for using the fax service, you established certain default settings for sending a fax that are pre-filled for you on the Send Fax dialog, and you can change any of these default settings for an individual fax on the Send Fax dialog.

1. After accessing the Send Fax dialog and addressing the fax, fill out the Send Fax dialog as follows:

   If appropriate, click the  button (to the right of the **Sent From Fax Number** field) to change the pre-filled information in the **Sent From** area (where pieces of information such as *Company Name* and *Voice Number* are displayed only if there is a corresponding heading on the cover page).

   In the **Cover Page** area, enter a subject to be printed on the cover page.

   If appropriate, select a different cover page from the *Cover Page File Name* drop-down list box.

   Either selecting ***Default*** or having no entry in this box causes the system-wide default cover page to be used.

   Checking the **NO Cover Page** box causes no cover page to be sent.

   In the **Schedule** area, if appropriate, change the transmission time from the default of *ASAP* to either *Offpeak* or *Delay Until*.

   If you selected Delay Until, in the *Date* and *Time* boxes, enter the date and time to send the fax.

   If you selected Offpeak, the fax is sent at whatever offpeak time has been set by the fax service administrator (typically a time such as 1:00 AM, when phone rates are less expensive).

   In the **Priority** box, select a delivery priority from the options available to you – being aware that when your fax service administrator configured you as a fax service user, he/she established the maximum priority available to you. (In other words, the *Urgent* priority may be configured as the top priority available for an employee who is head of the department, while *High* may be configured as the top priority available to individual members of the department.)

2. As appropriate, check the **Send** check box only, or both the **Send** and **Save** check boxes, or the **Save** check box only (depending on whether you want to transmit the fax only, transmit and save the fax, or save it only) to save the outgoing fax in a Folder. The *Folder name* and *Note* fields are enabled.

3. From the *Folder name* list, select the Transmit (i.e., Sent Fax) folder in which to store the fax. A Transmit folder is identified as . To create a new Transmit folder on-the-fly, specify the name of the new folder in the *Folder name* list. Once you click the **Send** button, you will be prompted that the specified folder does not exist and asking if you want to create it. Click *Yes* to create the new Transmit folder.

   In the *Note* field, specify a REQUIRED note (up to a maximum of 40 characters) to identify the fax in your Folder.

> ***Note: When you establish your Transmit options for using the fax service, you can specify that the default setting be Send and Save, so that the Save check box is always selected for you.***

4. If you want to be able to preview the fax in the Pending Queue before actually sending it, check the **Preview** check box. Note that when you check **Preview**, the **Send** check box is automatically deselected. You then release the fax for actual transmission from the Pending Queue.
5. Click the **Send** button. (Depending on your choice, the fax is sent only, sent and saved, or saved only.)

Addressing a Fax

However you access the Send Fax dialog, you use either of these methods to address the fax:

- Automatically transfer names and fax numbers from phonebooks
- Enter the names and fax numbers manually

Automatically Transferring Names and Fax Numbers from Phonebooks

Do the following to access Private/Public phonebooks and groups from the Send Fax dialog and automatically transfer fax recipient names and numbers:

1. On the Send Fax dialog, click either the **Private PB**... or **Public PB**... button to display the specified phonebook.

2. To select an entry, either highlight the entry and click the **Add** button or double-click the entry to move it to the *Recipients* box.
3. To remove a selected entry, highlight the entry and click the **Remove** button; to remove all selected entries, click the **Remove All** button (noting that it is not necessary to highlight the entries first).
4. Continue to select entries as needed. Click **OK** to be returned to the Send Fax dialog.

Entering Names and Fax Numbers Manually

Do the following to enter the names and fax numbers of fax recipients manually in the **Send To** area of the Send Fax dialog – **noting that the only information required to send a fax is the fax number in the Fax Number field** (in addition to the fax contents, which consists either of a cover page memo or a file attachment):

1. In the **Name** box, enter the name of the fax recipient. Note that if you enter part of the name of an individual/group who has already been added to either the Public or Private phonebook, when you tab to another field from the Name box, the auto-complete function completes the full name for you and adds the previously-specified information in the appropriate *Send To* boxes.
2. If you wish, tab to the **Company** box and enter the company of the fax recipient.
3. Tab to the **Fax Number** box and enter the destination fax number (the only information required to send a fax).
4. If you wish, tab to the **Voice Number** box and enter the voice number of the recipient.
5. If using the Accounting Function (whereby you can charge back fax-related costs according to recipient), tab to the **Account Number** field and enter a valid account number.
6. To automatically add the recipient to your Private phonebook, click the **Add to PB**… button to display the Phonebook Record – Modify dialog. Click **OK** to accept the recipient information and be returned to the Send Fax dialog.

7. To add additional recipients, click the **New** button in the Send To area and repeat steps 1 through 6. Move through your list of fax recipients by clicking the appropriate button:

    displays information for the first fax recipient added to the list

    displays information for the previous fax recipient added to the list

    displays information for the next fax recipient added to the list

    displays information for the last fax recipient added to the list

    clears the Send To fields in order to add a new fax recipient to the list

   To delete an entry, click the **Remove** button when the entry is displayed.

   To change an entry, click the appropriate button to display the recipient and change the information.

Continue filling out the Send Fax dialog, clicking the **Send** button to send the fax.

Creating a Brief Cover Page Fax Memo

You can create a fax message that will be printed on the cover page. In the message, you can also include commands that invoke a scanned image of your signature and/or invoke pre-printed images. When you access FAXCOM Client to send a fax by "printing" your Windows application to the Biscom Fax Printer, no memo is required to comprise your fax. When you access FAXCOM Client directly or from a FAXCOM Client phonebook, however, a cover page memo is required unless you attach an additional file.

Sending a Fax from any Windows Application

You can access the Send Fax dialog from any Windows application by "printing" the application output to the Biscom Fax Printer, as follows:.

1. Within a Windows application, “print” the application output to the Biscom Fax Printer and be transferred to the Send Fax dialog, with the name of the temporary print file created in the **Attachments** list box.

2. Fill out the Send Fax dialog as described in the preceding sections, being aware that no cover page memo is required when sending a fax that includes at least one attachment.

Sending a Fax that Includes up to 100 Attachments

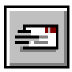
DEPENDING ON HOW YOUR FAX SERVICE IS CONFIGURED, you can include up to 100 attachments to your fax in addition to your cover page fax memo. The sources for the attachments can be any or all of the following:

- Files you select in Windows Explorer
- Received faxes in any FAXCOM Client Received fax folder
- Any open Windows application file that you "print" to the Biscom Fax Printer

Note: Verify with your fax service administrator the exact number of attachments you are able to attach to an outgoing fax.

If your site has the Translation Server option, you can add more attachment types than are supported with the basic FAXCOM server program (and you are advised to consult with your fax service administrator to determine what file types you can attach when invoking FAXCOM Client to send a fax).

Do the following to attach files:

1. Either click the **Send Fax** toolbar button  or select ***File…Send Fax…***.
2. On the Send Fax dialog, in the **Attachments Name** field, enter the full path name of the attachment and click the **Add File** button to add it to the list – up to the maximum number you have been told by your fax service administrator. (To remove a file you have added to the list, highlight the file and click the **Remove File** button.)
3. To search for files, click the **Browse**… button to display the Find Files dialog and locate the files in your file listing. Click **OK** to be returned to the Send Fax dialog.
4. To use the Add to List function, whereby you "print" Windows application output as fax attachments, click the **Add to List**: button. Once you click the **Add to List**: button, the FAXCOM Client begins keeping a running list of the files you attach,

enabling you to close the Send Fax dialog and select additional attachments to add to the list of attachments. Launch the Windows application and open the file to be attached to the fax. Select *File..Print…Biscom Fax Printer*. You are returned to the Send Fax dialog with the Windows application file added in the Attachments list.

5. To add one or more received faxes, click the **Add to List**: button; click the FAXCOM Client icon  in the taskbar to return to the FAXCOM Client main window; open a Received fax folder; select one or more received faxes, right-click and select *Send to Fax Recipient* to be returned to the Send Fax dialog with the selected fax(es) added to the Attachments list.

6. As appropriate, continue the process of specifying file names, clicking the **Browse...** button to select files, and clicking the **Add to List**: button to open and "print" Windows application files and select Received faxes.

7. When you have finished adding all the files you want to the fax, fill out the Send Fax dialog, address the fax, and create a brief cover page fax memo. Click **Send** to send the fax.

Sending a Fax from a FAXCOM Client Phonebook

From either the Private phonebook or the Public phonebook, do the following to send a fax to selected individual(s)/group(s) in the phonebook:

1. Within the phonebook, highlight the user(s)/group(s) and right-click to display the shortcut menu; select ***Send Fax...*** to be automatically transferred to the Send Fax dialog.

2. Fill out the Send Fax dialog, address the fax, and, if appropriate, create a brief cover page memo. Click the **Send** button to send the fax.

Customizing your Fax

You can merge your outgoing fax with pre-printed images that your fax service administrator has installed on the server. These images are of two types:

- A scanned image of your personal handwritten signature

- A form such as
  - a map with directions to your place of business
  - a customer survey
  - an order form

You issue simple commands in your outgoing fax cover page memo to invoke a scanned copy of your signature and/or invoke pre-printed images.

Invoke a Scanned Image of your Signature

If a scanned copy of your handwritten signature is stored on the fax server, do the following to cause an image of your handwritten signature to be inserted in your cover page fax memo:

1. From the Send Fax dialog, click the **Memo**... button to create your cover page memo.
2. Enter an **UPPERCASE** command **IN THE EXACT LOCATION** on the Create Memo screen where you want your signature to appear. The signature command has the following format:

    $SIG *XXXX*$

    where ***xxxx*** is the 4-character (maximum) filename of the signature, for example `$SIG BILL$`, `$SIG FRED$`, `$SIG MARY$`

    If necessary, consult with your fax service administrator to learn the name of the file that calls your signature.

Invoke Pre-printed Images

Do the following to merge an outgoing fax with a pre-printed form that your fax service administrator has installed on the server:

1. From the Send Fax dialog, click the **Memo**... button to create your cover page memo.
2. Enter an **UPPERCASE** command **ANYWHERE ON THE PAGE** that you want overlaid with the form. The command has the following format:

    $FORM *XXXX*$

where ***xxxx*** is the 4-character (maximum) filename of the form, for example,

`$FORM MAP$, $FORM SAVE$, $FORM SMPL$`

3. To force a form to begin on a new page, enter the following command in **UPPERCASE BEFORE** the `$FORM$` command:

    `$`**`NEWPAGE`**`$`

4. To merge multiple forms into one fax, enter the `$NEWPAGE$` command between each `$FORM$` command, as follows:

    $NEWPAGE$
    $FORM MAP$
    $NEWPAGE$
    $FORM SAVE$
    $NEWPAGE$
    $FORM SMPL$

Saving an Outgoing Fax in a Folder

Do the following to save the fax you have just prepared for transmission in a folder or subfolder:

1. On the Send Fax dialog, either check both the **Send** and **Save** check boxes or check only the **Save** check box (depending on whether you want to transmit the saved fax or just save it). The *Folder name* and *Note* fields are enabled.

2. From the *Folder name* list, select the Sent fax folder (identified as ) in which to store the fax. To create a new Sent fax folder on-the-fly, specify the name of the new folder in the *Folder name* list. Once you click the **Send** button, you will be prompted that the specified Sent fax folder does not exist and asking if you want to create it. Click *Yes* to create the new Sent fax folder.

3. In the *Note* field, specify a REQUIRED note to identify the fax in your folder.

4. Click the **Send** button. (Depending on your choice, the fax is sent and saved or saved only.)

Note: when you establish your Transmit options for using the fax service, you can specify that the default setting be Send and Save.

Once the fax has been saved into a Sent fax folder, you can select the fax, right-click and select *Review/Submit…* to be automatically transferred to the Send Fax dialog in order to have the opportunity to modify the previously-specified transmission information before resending.

Previewing an Outgoing Fax

Before actually transmitting a fax, you can preview its contents by doing the following:

1. When addressing and creating the fax on the Send Fax dialog (Figure 2-1), check the **Preview** check box. Notice that the **Send** check box is automatically deselected.
2. Click the **Send** button to send the fax to the fax server.
3. Select the Pending Queue (Figure 2-2), either by selecting *Logs…Pending Queue* or clicking the Pending Queue item in the Folder list.

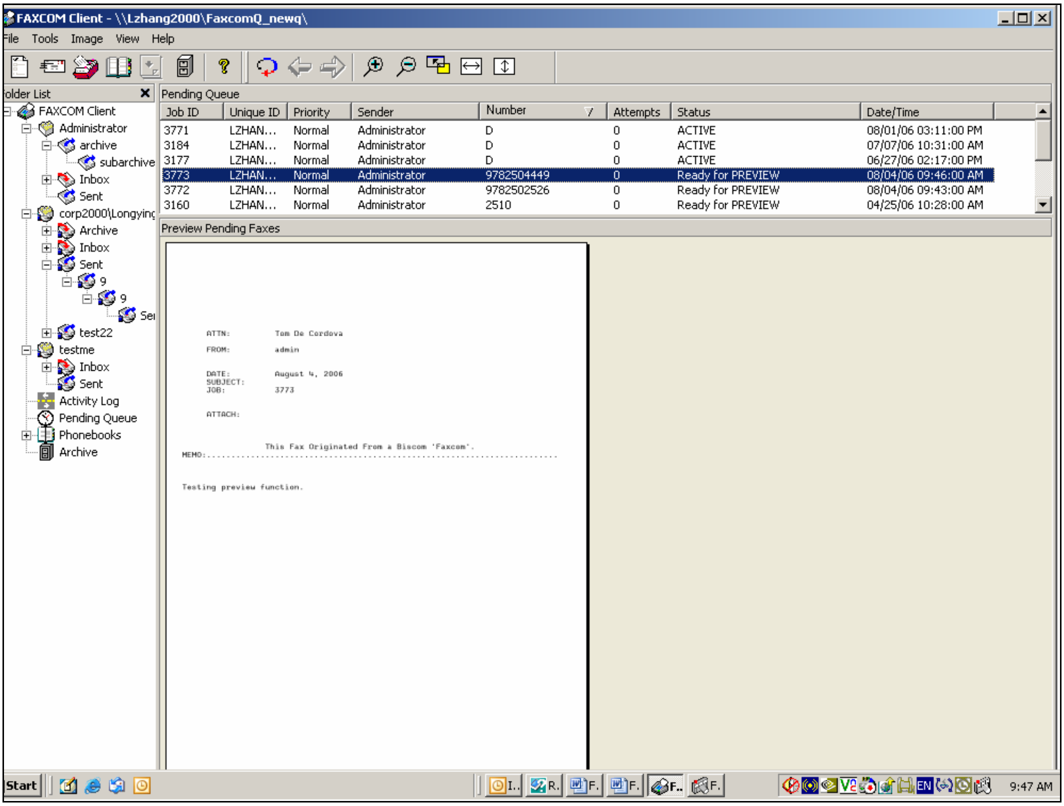
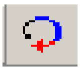


Figure 2-2. Pending Queue

4. Locate the appropriate outgoing fax and note its Status. Depending on the complexity of the fax contents, the number of jobs queued, the performance of the fax gateway, etc., you may or may not see all three of the following successive conditions: *Submitting PREVIEW*, *Preparing PREVIEW*, *Ready for PREVIEW.*

5. When the Status is *Ready for PREVIEW*, do either of the following:

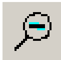
- Click the fax entry to display it in the Viewing pane. Use the Viewing pane toolbar buttons for full viewing capabilities, where

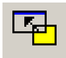
   – rotates the image

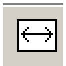
   – goes to the previous page

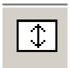
 – goes to the next page

 – zooms in

 – zooms out

 – fits to window

 – fits horizontally

 – fits vertically

- Select the fax entry, right-click and select *Preview* from the shortcut menu. The fax is opened either in the FAXCOM Viewer or in the fax viewer whose application path you specified on the Viewer/Log Options tab.

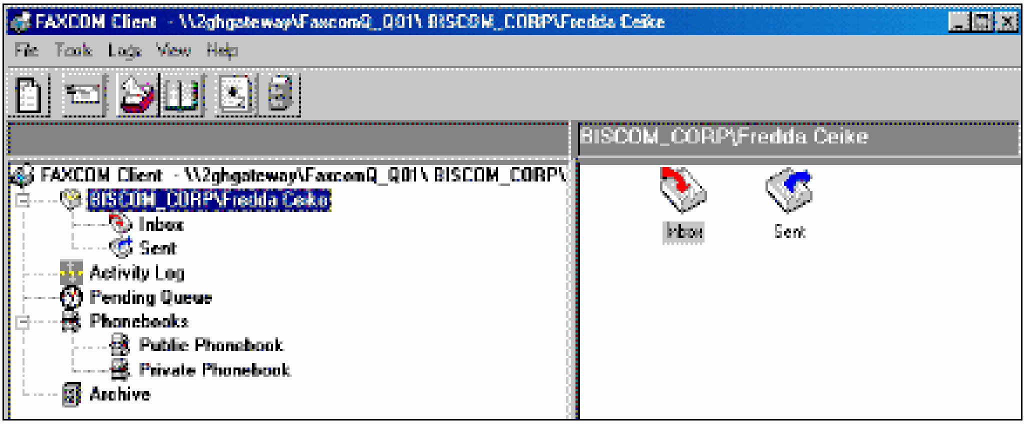
6. *If you have opened the outgoing fax in the Viewing Pane*, with the fax entry selected, right-click and select **Release** from the shortcut menu.

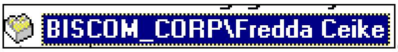
   If you have opened the outgoing fax in FAXCOM Viewer, select *File...Release Fax* within the FAXCOM Viewer to actually send the fax – or you can exit back to the Pending Queue, select the fax entry, right-click and select *Release* from the shortcut menu.

   If you have opened the outgoing fax in another fax viewer, exit the viewer and return to the Pending Queue. With the fax entry selected, right-click and select *Release* from the shortcut menu.

Using Sent Fax Folders

Within FAXCOM Client you can create folders and subfolders in which to store faxes. By default, two folders are already created for you, the Inbox folder to hold received faxes, and the Sent folder to hold Return Status messages for transmitted faxes, as shown below.



When you attempt to create a new folder at the topmost Mailbox level, for example, 

, you are prompted whether the folder is for Received faxes or Sent faxes. Otherwise, you can add only a Received fax subfolder under a Received fax folder, and only a Sent fax subfolder under a Sent fax folder. A Received fax folder is identified with the following icon . A Sent fax folder is identified with the following icon .

In addition to the automatically-created Sent folder to which Return Status messages are delivered for outgoing faxes, you can create as many Sent fax folders as you wish in order to save outgoing faxes.

From the automatically-created Sent folder, you can resend any faxes that failed to be transmitted, which is indicated by the fact that the *Status* field does **not** specify "ok". You can also send any outgoing faxes you saved into a Sent fax folder, or resend any faxes you previously both sent and saved into a Sent fax folder. In addition, you can print a list of the contents of a Sent fax folder and the Sent Fax entry details.

You can select all faxes in a Sent Fax folder by pressing **Ctrl-A.**

Do the following to use a Sent Fax folder (Figure 2-3):

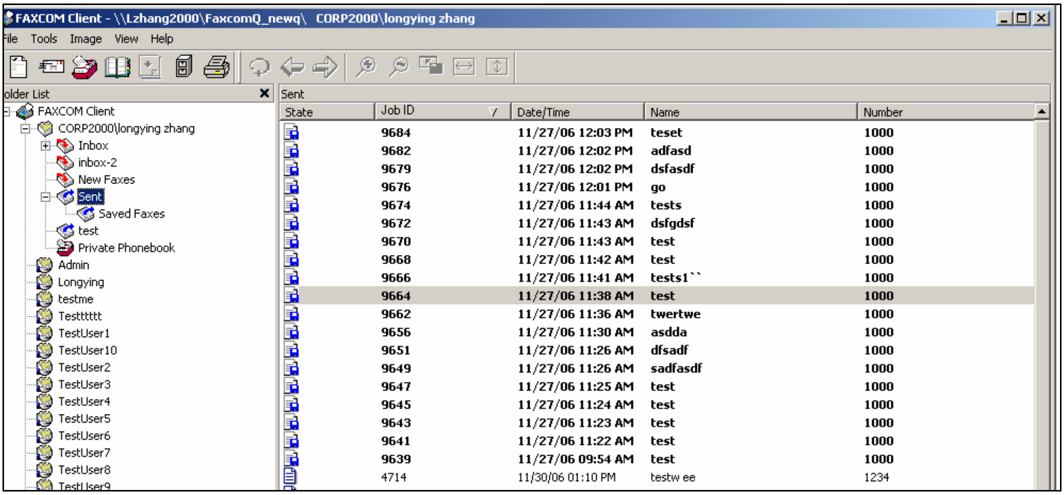
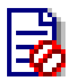


Figure 2-3. Sent Fax Folder

1. Open the appropriate folder.
2. View the following information:

State – displays an icon for the fax, according to whether it was saved , failed to be transmitted , or sent successfully .

Job ID – unique identifying number assigned by the fax service to track the fax; a transmitted fax retains the same job ID, regardless of how many attempts at transmission. When the Job ID reaches 9999, numbering restarts at 0001. (A saved fax always has a Job ID of 0000.

Attachment Count – the number of files attached to the outgoing fax

Date/Time – of final transmission attempt

Name – of fax recipient

Number – of fax recipient

Attempts – number of retries to transmit the fax

Status Code – a four-digit code that indicates the outcome of the fax; other than 0000 for *ok*, the status codes are error codes for why the fax was not successfully transmitted.

Status – abbreviated explanation of whether the transmission was successful. Successful transmissions are indicated by “ok.” Unsuccessful transmissions are indicated by such terms as “voic,” “noan,” “busy,” “nois,” etc.

Status Description – a fuller description of the outcome of the fax

Transfer Rate – baud rate of the exchange, either 14400, 12000, 9600, 7200, 4800 or 2400

Pages Sent – number of fax pages that were transmitted

Connect Time – amount of time in seconds on the phone to transmit the fax

Subject – information entered in the Subject field on the Send Fax dialog box

Fax Port – FAXCOM Server port on which the fax was transmitted

Note(s) – any descriptive notes added to the entry in the Sent fax folder

Note: By default, two additional column headings are not displayed but are available to be displayed: ID Tag, which is reserved for third-party applications, and UniqueJobID, which is used by the FAXCOM Job Tracking application.

3. If appropriate, click the column headings to toggle between an ascending/descending sort.

4. *To add/remove columns*, right-click anywhere in the Sent fax folder and select ***Add/Remove Columns*** from the shortcut menu. In the Select Columns dialog that is displayed, select entries in the *Available Columns* list and move them into the *Displayed Columns* list, either by double-clicking the entries or by using the **Add**/**Add All** buttons. Remove entries from the *Displayed Columns* list, either by double-clicking the entry or using the **Remove**/**Remove All** buttons. Click the **Move Up**/**Move Down** buttons as appropriate to cause the entry to move to the left-hand/right-hand side of the Sent fax folder. Click **OK** to be returned to the Sent fax folder with your selections enabled.

5. *To display the information for a sent fax in its own window*, select the fax entry and right-click; select ***Details***. Note that you can execute the ***Delete***, ***Move to…***, and ***Review/Submit…*** functions (described below) from within the Details window.

6. *To add one or more notes to one or more entries*, select the entries, right-click and select ***Add Note(s)*** from the shortcut menu. ***If your fax service***

administrator has configured you with multiple note fields, you are shown a list of the note fields, enabling you to select a specific note field or to Add All Notes. Make the appropriate selection.

7. In the *Add/Modify Note* or *Add/Modify Notes* dialog that is displayed, specify the note in the appropriate field. Note that if you had previously added a note to the fax in a *Note* field, the previously-specified note is displayed, which you can type over.

   If you had selected multiple fax entries, be aware that the same note is applied to all when you click OK. Cancel closes the dialog without adding notes.

8. *To delete an entry from the folder*, highlight the entry, right-click and select Delete from the shortcut menu to remove the entry. (If appropriate, you can press Ctrl-A to select all faxes before selecting Delete.)

9. *To move a fax into another folder*, highlight a failed fax entry, right-click and select ***Move to Folder...*** to display the Move fax(es) to a Folder dialog. Choose the appropriate folder and click OK.

10. *To resend a failed fax (or send a saved fax)*, highlight the fax entry, right-click and select ***Review/Submit...*** from the shortcut menu to be automatically transferred to the Send Fax dialog. If appropriate, make any changes to the fax contents/transmission information and click Send to send the fax.

11. *To resend one or more failed faxes (or send one or more saved faxes)*, highlight the fax entries, right-click and select ***Review/Submit...*** from the shortcut menu. When prompted whether you want to review the original transmission for each fax before sending, click the Review button to be automatically transferred to the Send Fax dialog for each fax, make your changes and click Send to send the fax. Click Submit All to immediately send the faxes with the previously-specified transmission information unchanged.

12. *To print the folder listing*, right-click anywhere within the folder to display the shortcut menu and select ***Print Summary*** to display the Print dialog. Click OK to send the list of folder contents to the selected printer.

13. Do either of the following to print one or more Transmission Fax Reports that are returned to the Sent folder automatically created for a fax user account:

- Select one or more entries in the Sent folder and either right-click and select **Print Details** or click the **Print** toolbar button  to display the Print dialog. Click **OK** to send Transmission Fax Reports for the selected entries to the selected printer.

- Select the Sent folder itself and click the **Print** toolbar button to display the Print dialog, with the *Print range* **All** radio button selected. Click **OK** to print Transmission Fax Reports for all entries to the selected printer (where you will receive a message if the Sent folder contains more than 30 entries).

Displaying Sent Fax Details

- To display detailed information for the sent fax in its own window, right-click the appropriate entry and select ***Detail*** from the shortcut menu. Note that you can execute the ***Delete***, ***Move to Folder...***, ***Print*** and ***Review/Submit...*** functions (described below) from within the Details window.

Adding Note(s) to a Sent Fax Entry

Add a note to one or more Sent fax entries in a Sent fax folder as follows:

1. Open the appropriate folder, identified with the following icon  and select the entry/entries as follows:

   To select consecutive faxes, click the first item, press and hold down **SHIFT**, and then click the last fax.

   To select faxes that are not consecutive, press and hold down **CTRL**, and then click each fax.

   To select all faxes, press **Ctrl-A.**
2. Right-click and select **Add Note(s)** from the shortcut menu. ***If your fax service administrator has configured you with multiple note fields***, you are shown a list of the note fields, enabling you to select a specific note field or to *Add ALL Notes*. Make the appropriate selection.
3. In the specific *Note* field, add a short note that describes the fax. Note that if you had previously added a note to the fax, the previously-specified note is displayed (which you can replace).

If you had selected multiple fax entries, be aware that the same note is applied to all when you click **OK**. **Cancel** closes the dialog without adding notes.

Displaying Available Note Fields

When your fax service administrator configures your use of the fax service, he/she can specify multiple fields in which you can add a note to a fax. Do the following to display the available note fields:

1. Right-click anywhere in the folder and select ***Add/Remove Columns…***. A dialog is displayed, with a list of Available Columns and a list of Displayed Columns.
2. ***To move a specific column from the Available Columns list to the Displayed Columns lis***t, select the column name and click the **Add** button.

   To move all columns from the Available Columns list to the Displayed Columns list, click the **Add All** button.

   To delete a specific column from the Displayed Columns list, select the column name and click the **Remove** button.

   To delete all columns from the Displayed Columns list, click the **Remove All** button.
3. To change the order in which columns are displayed (where top to bottom equates as left to right when the folder is opened), select the column in the Displayed Columns list and click the **Move Up**/**Move Down** button as appropriate. Click **OK**.

Deleting a Sent Fax

You can delete a fax from a Sent fax folder, as follows:

1. Open the appropriate folder, identified with the following icon  and select the entry/entries.
2. Right-click and select ***Delete*** from the shortcut menu. When prompted to confirm the deletion, click *Yes* to delete a single fax, *Yes to All* to delete all selected faxes, *No* not to delete a single fax or *Cancel* to exit without deleting.

Note: On the Viewer/Log Options tab (Figure 1-7), you can specify whether to receive a message prompting you to confirm your deletions of selected faxes.

Moving Sent Faxes to another Folder

You can move Sent faxes to another folder as follows:

- Open the appropriate folder, select the entry/entries, right-click and select *Move to Folder…* to display the Move to a Folder dialog. Choose the appropriate Folder. Click OK to be returned to the Sent fax folder. Click Cancel to exit the dialog without moving the fax(es).

Resending a Failed/Saved Fax

When you specify your Transmit options, you can specify that a Return Status be returned for all outgoing faxes, or only for those that fail to be transmitted. These Return Status messages are delivered to the Sent folder at the topmost Mailbox level.

In addition, when creating a fax on the Send Fax dialog, you can save it into a folder or subfolder you create.

You can then select a fax that you saved and/or that failed to be delivered (either from the Sent folder of Return Status messages or from another specified folder) and send/resend the fax, as described below.

1. Select a fax that was saved into a specified folder on the Send Fax dialog, or one in the Sent folder that does not have a Status of ok, right-click and select *Review/Submit….* You are automatically transferred to the Send Fax dialog, where you can send the fax as is, or with any changes you choose to make.

2. If appropriate, select multiple faxes to resend, right-click and select *Review/Submit….* You receive a prompt such as the following: “You have selected 6 fax(es). Click Review to review the original transmission for each fax before sending; click Submit All to automatically send all the fax(es).”

   If you want to be able to make changes to any of the selected faxes before resending, click the Review button to go to the Send Fax dialog for each fax, and then click the Send button to resend the fax.

If you want to resend the faxes automatically, without making any changes to any of the selected faxes, click the **Submit All** button.

Printing a Sent Fax Folder Listing

To print the Sent fax folder listing, right-click anywhere within the folder to display the shortcut menu and select *Print* to display the Print dialog. Click **OK** to send the Sent folder to the selected printer.

Faxing Directly from Canon MFP Devices

The FAXCOM Client now includes the capability to fax directly from a Canon MFP device. Consult with your fax service administrator to determine whether that function is available to you.

Chapter Three: Receiving a Fax and Using Received Fax Folders

Using a Received Fax Folder

You can perform the following functions – described later in this chapter – in a Received fax folder – where new, unread faxes are displayed in bold:

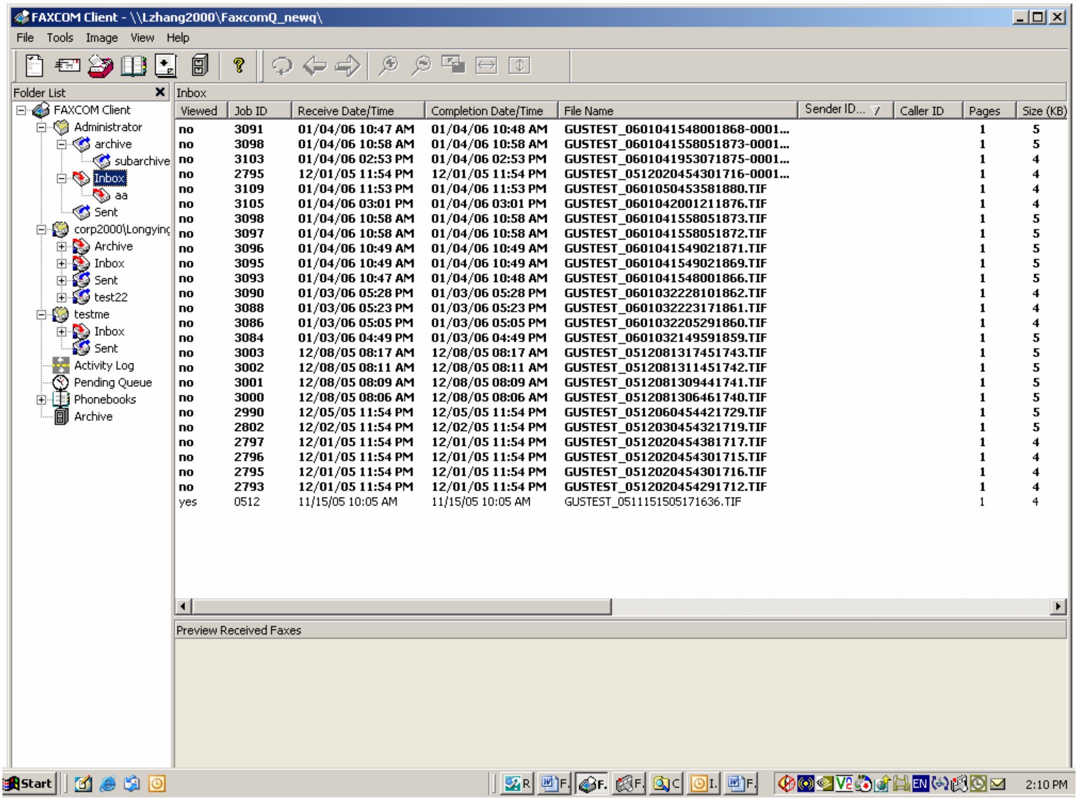


Figure 3-1. Received Fax Folder

Detail – display detailed information for the received fax in its own window

Preview – view the received fax in the Viewing window

View – view the received fax in the configured TIFF viewer

Get Next Unread Fax – display the oldest, unread fax

Add Note(s) – add one or more descriptive notes to a received fax entry

Forward – forward the fax to another network user, group, printer, or shared Received fax folder

Delete – delete the received fax

Mark as Read – specify that an unviewed fax be marked as read

Mark as Unread – specify that a viewed fax be marked as unread; if the fax is marked as Unread, this function changes to **Mark as Read** (enabling you to toggle between the read/unread states)

Print – print the contents of the Received folder

Print Fax – print the selected fax(es)

Send to Mail Recipient – forward one or more received faxes to an email recipient

Send to Fax Recipient – be transferred to the Send Fax dialog in order to send the received fax

When selecting faxes in a Received fax folder, you can use the following key combinations:

Ctrl-A – to select all faxes

Ctrl-C – to copy selected faxes

Ctrl-V – to paste selected faxes into another folder you have opened

Ctrl-X – to cut selected faxes (in order to paste them into another folder)

You can view the following information:

Viewed – either *Yes* or *No* for whether you have read the fax.

Receive Date/Time – ***in the case of a fax you receive directly***, the date and time when the phone connection was established to receive the fax, for example, *07/03/02 02:58PM;* ***in the case of a fax that was forwarded to you by another fax service user***, the date and time the user forwarded the fax to you.

Completion Date/Time – ***in the case of a fax you receive directly***, the date and time when the fax server finished receiving the fax; ***in the case of a fax that was***

forwarded to you by another fax service user, the date and time when the fax server finished receiving the fax sent to the forwarding user.

File Name – unique identifying name assigned by the fax service, for example, *IMFL0007*

Sender ID – Transmitting Subscriber ID (TSI) of sending fax machine (or sending fax number)

Caller ID – sending fax number

Pages – number of pages of the fax

Size (KB) – number in kilobytes of the file where the received fax is saved

Status – either *ok* (for a successfully received fax), or *rdis* (for a remote disconnect error). It is possible that there is a page count in the Pages field, and yet the fax status is *rdis*, indicating only some of the total pages of the fax were received successfully.

Note: you can still view a fax for which only some of the pages were successfully received. Moreover, if the sending fax device stamped the fax with the total number of pages, you can ascertain how many pages you should have received.

Status Code – error code for the received fax. A code of 0000 indicates the fax was successfully received; a code for rdis is 0052.

Status Text – a verbal explanation of the status code, such as *FAXCOM receive mode; disconnect requested*

Connect Time – amount of time in seconds on the phone line to transmit the fax

DID Number – extension dialed by the remote fax device

Fax Port – port on the FAXCOM server on which the fax was received

Fax Server – IP address of the fax server on which the fax was received

Notes – any descriptive notes added by the recipient (after selecting **Add Note[s]**) – for example, *Insurance Quote*

- If appropriate, click the column headings to toggle between an ascending/descending sort.

- *To add/remove columns*, right-click anywhere in the Received fax folder and select ***Add/Remove Columns*** from the shortcut menu. In the Select Columns dialog that is displayed, select entries in the *Available Columns* list and move them into the *Displayed Columns* list, either by double-clicking the entries or by using the **Add**/**Add All** buttons. Remove entries from the *Displayed Columns* list, either by double-clicking the entry or using the **Remove**/**Remove All** buttons. Click the **Move Up**/**Move Down** buttons as appropriate to cause the entry to move to the left-hand/right-hand side of the Received fax folder. Click **OK** to be returned to the Received fax folder with your selections enabled.

Displaying Received Fax Details

- To display detailed information for the received fax in its own window, right-click the appropriate entry and select ***Details*** from the shortcut menu.

Viewing a Received Fax

You can view a received fax in two ways:

- Display it in the Viewing Pane without opening it
- Open the fax in the configured fax viewer, as described below.

1. Open the appropriate Received Fax folder, identified with .
2. Either double-click the entry to view (or highlight the entry and select **View** from the shortcut menu. The fax is then displayed with the configured default viewer. (If you have not specified your default viewer program, you will be prompted to specify [or browse through your file listing for] the viewer program with which to open the fax.)
3. Use the viewer to manipulate the fax image and perform additional functions on the received fax (as described in Chapter Five).

Note: Users of Shared Received fax folders should be aware that since multiple users can open the same fax in FAXCOM Viewer and make changes (such as adding text), you may receive a prompt when saving the fax in FAXCOM Viewer that another user has made changes which your changes will overwrite.

Getting the Next Unread Fax

Do the following to view the oldest, unread fax – where new unread faxes are displayed in bold:

- Either click the  toolbar button or right-click anywhere in the folder and select *Get Next Unread Fax* from the shortcut menu.

Adding Note(s) to a Received Fax Entry

Add note(s) to one or more received fax entries in a Received fax folder as follows:

1. Open the appropriate folder, identified with the following icon .
2. Select the entry/entries as follows:

   To select consecutive faxes, click the first item, press and hold down **SHIFT**, and then click the last fax.

   To select faxes that are not consecutive, press and hold down **CTRL**, and then click each fax.

   To select all faxes, press **Ctrl-A**.

3. Right-click and select ***Add Note(s)*** from the shortcut menu. ***If your fax service*** administrator ***has configured you with multiple note fields***, you are shown a list of the note fields, enabling you to select a specific note field or to *Add All Notes*. Make the appropriate selection.

4. In the *Add/Modify Note* or *Add/Modify Notes* dialog that is displayed, specify the note in the appropriate field. Note that if you had previously added a note to the fax in a *Note* field, the previously-specified note is displayed, which you can type over.

   If you had selected multiple fax entries, be aware that the same note is applied to all when you click **OK**. **Cancel** closes the dialog without adding notes.

Displaying Available Note Fields

When your fax service administrator configures your use of the fax service, he/she can specify multiple fields in which you can add a note to a fax. Do the following to display the available note fields:

1. Right-click anywhere in the folder and select *Add/Remove Columns…*. A dialog is displayed, with a list of Available Columns and a list of Displayed Columns.
2. To move a specific column from the Available Columns list to the Displayed Columns list, select the column name and click the Add button.

   To move all columns from the Available Columns list to the Displayed Columns list, click the **Add All** button.

   To delete a specific column from the Displayed Columns list, select the column name and click the **Remove** button.

   To delete all columns from the Displayed Columns list, click the **Remove All** button.
3. To change the order in which columns are displayed (where top to bottom equates as left to right when the folder is opened), select the column in the Displayed Columns list and click the **Move Up**/**Move Down** button as appropriate. Click **OK**.

Forwarding a Received Fax to Another Network User, Group, Printer, or Shared Received Fax Folder

Do the following to forward a received fax from a Received fax folder – without having to open up the fax and view it:

1. From a Received fax folder, highlight the fax entry to forward, right-click and select *Forward* from the shortcut menu to display the Forward Fax dialog (Figure 3-2).

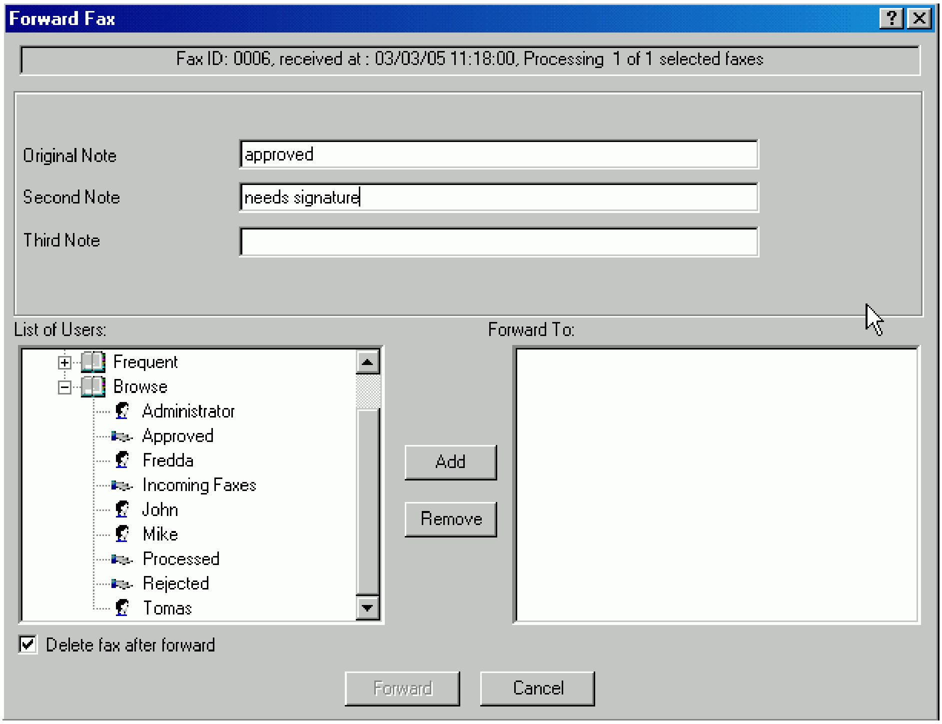


Figure 3-2. Forward Fax Dialog

The fax service users, groups, printers, and shared Received fax folders to which you can forward the fax are organized in three containers, *Recent*, *Frequent*, and *Browse*, where

Recent – contains the most recent items to which you forwarded faxes

Frequent – contains the items specified by the fax service administrator

Browse – opens a network listing from which you can select the appropriate user/group/printer/shared folder

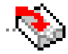
2. In the List of Users, highlight the item to which to forward the fax, and click the **Add** button to move it to the Forward To list. (To remove an item from the Forward To list, select the entry and click the **Remove** button.)

3. To delete the forwarded fax from the Received fax folder, check the **Delete fax after forward** check box.

4. Click **Forward** to forward the fax to the selected items. Click **Cancel** to exit without forwarding the fax.

Deleting a Received Fax

You can delete a fax from a Received fax folder that you received directly or had forwarded to you.

1. Open the appropriate folder, identified with the following icon  and select the entry/entries.
2. Right-click and select ***Delete*** from the shortcut menu. If the fax has been viewed, it is deleted from the folder. If the fax has **not** been viewed, you are prompted whether you want to delete it. Click **OK** to delete or **Cancel** to exit without deleting.

Note: On the Viewer/Log Options tab (Figure 1-7), you can specify whether to receive a message prompting you to confirm your deletions of selected faxes.

Mark as Read/Unread

- To specify that a viewed fax be marked as *Unread*, right-click a viewed fax and select ***Mark as Unread*** from the shortcut menu; to specify that an unviewed fax be marked as *Read*, right-click an unviewed fax and select ***Mark as Read*** from the shortcut menu.

Printing the Received Fax Folder Listing

- To print the Received fax folder listing, right-click anywhere within the folder to display the shortcut menu and select ***Print*** to display the Print dialog. Click **OK** to send the Received fax folder to the selected printer.

Printing Faxes

- To print the faxes themselves, select the faxes to be printed, right-click and select ***Print Fax*** to display the Print dialog. Click **OK** to send the selected faxes to the selected printer.

Sending a Received Fax to an email Recipient

Do the following to send a received fax to an email recipient:

1. Within the specific folder, select the faxes to be sent to an email recipient, as follows:

   To select consecutive faxes, click the first item, press and hold down SHIFT, and then click the last fax.

   To select faxes that are not consecutive, press and hold down CTRL, and then click each item.

   To select all faxes, press Ctrl-A.

2. Right-click and select *Send to Mail Recipient* from the shortcut menu. You are automatically transferred to your email application New Message window, with each selected fax shown as an attachment icon.

3. Proceed to address and send the message with the attached fax(es), as you do with any email message.

Sending a Received Fax to a Fax Recipient

Do the following to send a received fax to a fax recipient:

1. Within the specific folder, select the faxes to be sent to a fax recipient, right-click and select *Send to Fax Recipient* from the shortcut menu. You are automatically transferred to the Send Fax dialog, with each selected fax listed in the Attachment list.

2. Proceed to address and send the fax.

Chapter Four: Using Share Rights to another User Account

You may be configured to access the faxes in the account of another fax service user. Just what fax functions you can perform in the shared user account depends on the specific permissions granted you by the fax service administrator, where the following permissions are available:

Read – read-only access to the faxes and return status messages for transmitted faxes

Delete – capability to delete faxes and return status messages for transmitted faxes; being granted the **Delete** permission automatically grants you **Read** and **Write** permissions

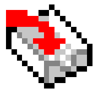
Send As – capability to send faxes as the user account being shared; being granted the **Send As** permission automatically grants you the **Read** permission. While the **Send As** permission enables viewing of phonebooks and FAXCOM Client options in the shared account, it does *not* enable you to make changes to phonebooks and options.

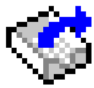
Write – capability to do the following: modify notes added to faxes; copy faxes (and return status messages for transmitted faxes) between folders/subfolders; create subfolders; annotate faxes being viewed in FAXCOM Viewer. Being granted the **Write** permission automatically grants you the **Read** permission.

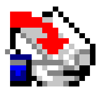
Archive – enables you to run the FAXCOM Client, select a folder/subfolder to which you have been given access, right-click and select ***Send to Archive…*** and archive faxes.

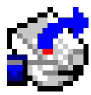
Specify Permissions – enables you to run the FAXCOM Client, select a user account to which you have been given access, right-click, select ***Share Rights…***, and specify user account permissions (which cannot be greater than those you yourself were granted). When your fax service administrator grants you the **Specify Permissions** capability, he/she can specify that any permissions you specify for the shared user account *cannot* override the permissions set by the administrator for this user.

If you do not have Share Rights to any other user accounts, none are displayed in your FAXCOM Client folder listing. Figure 4-1 shows the FAXCOM Client of a user with Share Rights access to an additional user account, TestUser1. Note the difference in the folder icons for shared and unshared user accounts:

Unshared Received fax folder: 

Unshared Sent fax folder: 

Shared Received fax folder: 

Shared Sent fax folder: 

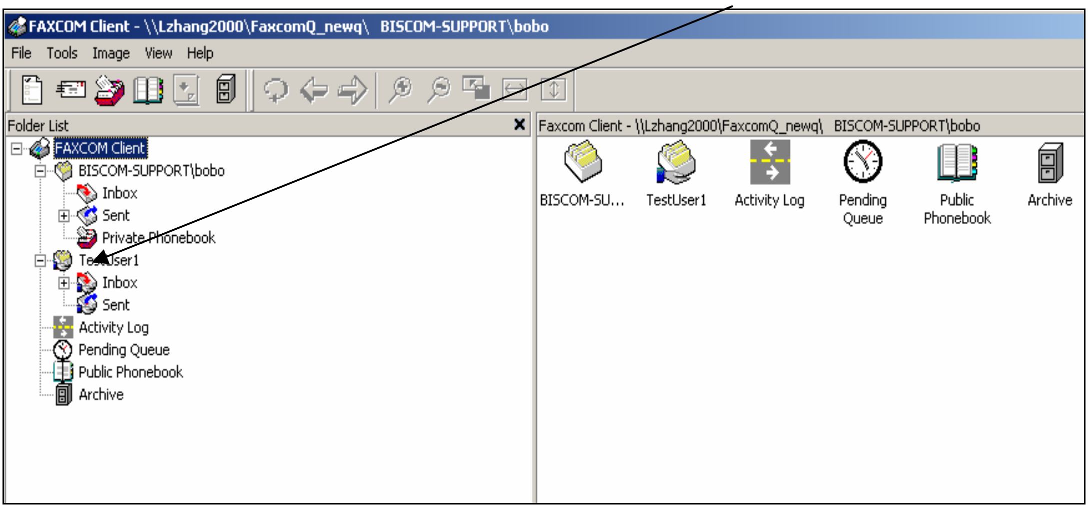


Figure 4-1. FAXCOM Client with Access to an Additional User Account

Specifying Permissions

If your fax service administrator has given you Specify Permissions access to the shared user account, do the following to implement the access:

1. Select a user account in the folder listing, right-click and select ***Share Rights***... to display the Accounts Rights dialog (Figure 3-2), with a list of users previously granted Share Rights to this user account.

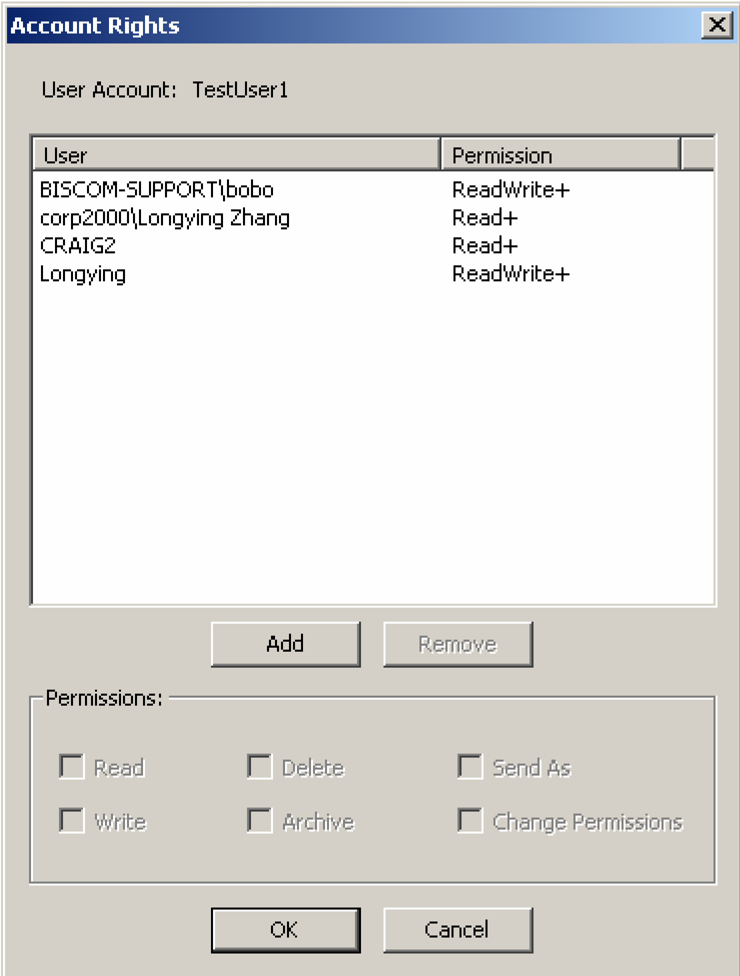


Figure 4-2. Account Rights Dialog

2. *To grant another user Share Rights to the user account*, click the **Add** button, select a user from the displayed list, and click OK to be returned to the Account Rights dialog.

3. *To remove a user from having Share Rights to the user account*, select the user and click the Remove button. When prompted to confirm the deletion, click Yes.

4. *To specify/modify Share Rights for a user*, select the user to enable the Permissions check boxes. Note that the specific check boxes that are enabled depend on the following:

- The specific permissions you have been granted to this user account – since you *cannot* specify permissions greater than those granted you
- Whether or not the fax service administrator has specified that any permissions you grant *cannot* override the permissions previously set by the administrator for this user account.

5. As appropriate, check/uncheck the enabled permissions and click OK.

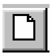
Chapter Five: Using FAXCOM Viewer

Working With Documents

Once you invoke FAXCOM Viewer, you can create and open additional documents, and even overlap two documents.

This section describes the basic procedures for working with document files.

Creating a New Blank Document

Either click , or on the ***File*** menu click ***New***.

A blank TIFF image document, called *Unnamed*, is displayed in a new window.

Opening a Document

1. Either click , or on the ***File*** menu click ***Open*** to open an existing TIFF image document.
2. In the *Look In* box, click the location of the document.
3. In the area below the *Look In* box, double-click the appropriate folder.
4. Double-click the document name to open it (or type the name in the *File Name* box).

Closing a Document

1. Either click , or from the ***File*** menu click ***Close***.

   If you have made changes to the document, you are prompted whether to save the changes.

2. Click *Yes* or *No* as appropriate.

   If you have used any of the Annotation tools (except the Text tool) to make changes, you are prompted whether you want to merge the annotations with the original image).

3. Click *Yes* to make the annotations permanent by fusing them to the page; click *No* if you do not wish to retain any lines or highlighting you have added.

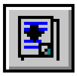
   Text you have input is automatically saved and merged.

4. Click *Yes* to make the annotations permanent by fusing them to the page; click *No* to close the document without retaining the annotations.

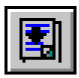
Getting the Next Unread Fax

When you access FAXCOM Viewer from a Received fax folder, you have the capability to view the next unread fax without having to be returned to the folder. (When you access the FAXCOM Viewer as a standalone application [**not** from a Received fax folder] this capability is unavailable.)

Do the following to view the next unread fax in a Received fax folder:

1. After opening the FAXCOM Viewer from a Received fax folder and while viewing a fax, either click  or click ***Get Next Unread Fax*** on the *File* menu.

   The next unread fax is opened, and becomes the active window. If you then return to the previously-viewed fax (by making it the active window) and attempt to close it after having made a change (such as an annotation), you are prompted whether to save the changes before closing the document.

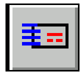
2. Continue the process of clicking  or clicking ***Get Next Unread Fax*** on the *File* menu.

   When you reach the last of the unread faxes, a message is displayed informing you that there are no more unread faxes to view.

Faxing and Forwarding a Document

While you are viewing a fax, you can fax it to any specified fax recipient(s), as well as forward it to other fax service users.

To fax the document:

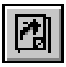
1. To send a fax of the image you are currently viewing, either click  or on the *File* menu click *Send Fax*.

   In full-page view, you are prompted to specify whether to send all pages in the document, or to enter a specific page range to be sent.

   In thumbnail view, *you* are prompted to specify whether to send all pages in the document, to send selected pages, or to enter a specific page range to be sent.

2. Select the appropriate option and click OK to be automatically transferred to the FAXCOM Client Send Fax dialog in order to address the fax, specify transmission options, create a cover page memo, save the fax in a folder, etc. If necessary, access the online help available from the Send Fax dialog to guide you in sending the fax.

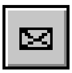
To forward the document to another fax service user:

1. Either click  or click *Forward Fax* on the *File* menu.

   The Forward Fax dialog is displayed (Figure 3-2).

2. Follow the instructions in the “Forwarding a Received Fax to Another Network User, Group, Printer or Shared Received Fax Folder” section in Chapter Three to forward the fax.

To forward the fax to an email recipient:

1. Either click  or select *Send to Mail Recipient* from the *File* menu, or right-click and select *Send Fax to Mail Recipient* from the shortcut menu.

   You are automatically transferred to your email application New Message window with an attachment icon for the fax.

2. Address and send the fax as you would any email message.

Adding a Note to a Fax

While viewing a received fax, you can add a descriptive note to the fax that will be displayed in the Received fax folder containing the fax.

1. Either click  or click ***Add Fax Note*** on the ***File*** menu.

2. In the Fax Note box that is displayed, add a short (40 characters maximum) note that describes the fax and click **OK**. (Note that if you had previously added a note to the fax, the previously-specified note is displayed. To change the original note, type over it with the new note and click **OK**.

Releasing a Fax

When you check the **Preview** check box on the Send Fax dialog (Figure 2-1) you are able to preview the fax before it is actually transmitted. You then preview the fax by accessing the Pending Queue, selecting the appropriate fax entry, and, when the Status displays ***Ready for PREVIEW***, right-clicking and selecting Preview from the shortcut menu to display the fax in FAXCOM Viewer.

Once you have previewed the fax, you release it for transmission by selecting **File**...**Release Fax** on the **File** menu.

Renaming a Document

1. On the ***File*** menu click ***Save As***.

   The *Save as* dialog is displayed.

2. To save the file in a new location, enter the location in the *Save in* box; to rename the document, enter the new name in the *File name* box.

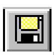
3. Click the **Save** button.

Reversing the Previous Action

- Either click , or on the ***Edit*** menu click ***Undo.***

(The Undo function is grayed out if the most recent action cannot be reversed.)

Saving Changes to a Document

1. Either click , or on the ***File*** menu click ***Save***. All pages of the document are automatically saved.

2. If you have used any of the Annotation tools (except the Text tool) to make changes, you are prompted whether you want to merge the annotations with the original image).

3. Click *Yes* to make the annotations permanent by fusing them to the page; click *No* to retain the annotations as an overlay on the original image that can still be modified (resized, copied, moved, etc.).

   Text you have input is automatically saved and merged.

   If you are in Thumbnail mode, you are prompted whether to save all pages, save the selected pages, or save the page range you specify.

4. Select the appropriate radio button and click **OK**.

5. To be able to assign a new name to a document, or save it in another file location, click **Save As** (rather than **Save**) and enter the new name in the *File name* box, and the new location in the *Save in* box.

Launching an External Application

1. On the ***File*** menu click ***Run External Application*** to be able to launch an application external to the FAXCOM Viewer – such as an Optical Character Recognition (OCR) program.

   The Run external application box is displayed, prompting you for which external application to run, and informing you that the document you are currently viewing in FAXCOM Viewer has been saved as `C:\TEMP\currimgs.tif`.

2. Either enter the path to the external application in the *External application pathname* field, or click the **Browse** button to display the *Open* box and select the file to open. Click the **Run** button to launch the application.

   If you have launched an OCR program, you can then open the document you are currently viewing, saved as `C:\TEMP\currimgs.tif`, to perform OCR on it.

Showing/Hiding the Status Bar

The status bar is a horizontal area below the image window that provides information about the current state of what you are viewing in the window, such as the function of a toolbar button, page count, page currently displayed and annotation tool in use.

1. *To show the Status Bar*, on the ***View*** menu click ***Show Status bar***.

   A checkmark is displayed next to the command to indicate the toolbox is displayed.

2. *To hide the Status Bar*, on the ***View*** menu click ***Show Status bar*** (when a checkmark is displayed next to the command).

   A checkmark is no longer displayed next to the command to indicate the status bar is not displayed.

Showing/Hiding the Toolbar

In addition to the standard Windows buttons (such as **New**, **Open**, **Save**, **Print**, **Cut**, **Copy**, **Paste**, etc.), the Toolbar includes buttons you click to select an area, rotate the image, display a thumbnail image of all pages, go to previous/next page, zoom the image, touch up the image, erase, scan, and send a fax.

1. *To show the Toolbar*, on the ***View*** menu click ***Show Toolbar***.

   A checkmark is displayed next to the command to indicate the Toolbar is displayed.

2. *To hide the Toolbar*, on the ***View*** menu click ***Show Toolbar*** (when a checkmark is displayed next to the command).

   A checkmark is no longer displayed next to the command to indicate the Toolbar is not displayed.

Showing/Hiding the Annotation Toolbar

The Annotation toolbar includes buttons you click to insert text, draw lines and curves, highlight a rectangular area and select the color for your annotations.

1. *To show the Annotation toolbar*, on the ***View*** menu click ***Show Annotation Toolbar***.

   A checkmark is displayed next to the command to indicate the toolbar is displayed.

2. *To hide the Annotation toolbar*, on the ***View*** menu click ***Show Annotation Toolbar*** (when a checkmark is displayed next to the command).

   A checkmark is no longer displayed next to the command to indicate the toolbar is not displayed.

Overlapping Background and Foreground

You can open multiple documents in FAXCOM Viewer and then specify one as the foreground and one as the background. You can then process the foreground image without affecting the background image.

Note: You can also overlap two pages in one document, and even overlap a page on itself.

1. Open one or more documents.
2. On the ***Window*** menu, click either ***Tile Horizontally*** or ***Tile Vertically*** to display all open documents simultaneously.
3. On the ***Process*** menu, click ***Overlap***.
4. With one of the documents selected as the active document, in the Overlapping dialog click the appropriate button: either **Foreground** or **Background**.
5. Click another of the documents to make it the active document, and in the Overlapping dialog click the other button, i.e., if you clicked **Foreground** for the first document, click **Background** for the second; if you clicked **Background** for the first document, click **Foreground** for the second.

   The Overlapping dialog automatically closes.
6. Maximize the document with the overlapping images, and work with it as appropriate.
7. To move the foreground image over the background image, on the ***Process*** menu click ***Shift Foreground***. Specify the number of pixels to move the image and the direction (*Up*, *Down*, *Left*, *Right*), and click **OK** to move the image the specified amount and direction.
8. To end the **Overlap** function, on the ***Process*** menu, click ***Finish Overlap***.

Shifting the Foreground

When you are overlapping one document onto another, you can move the foreground image by specifying the amount to move it and the direction.

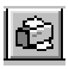
1. With one image overlapping another, on the *Process* menu click *Shift Foreground*.
2. In the box that is displayed, specify the number of pixels to move the image and the direction (*Up*, *Down*, *Left*, *Right*) and click OK.

Scanning and Printing

The following sections explain how you can invoke scanning functions within FAXCOM Viewer, in addition to printing the displayed image.

Scanning a Page

If you have a TWAIN-compatible scanner connected to your PC, and have installed the correct TWAIN drivers for your PC operating system, you can launch your scanner application from FAXCOM Viewer to automatically insert a scanned page in your document, as follows:

1. With a page inserted in the scanner sheet feeder (top edge down, printed side away from you), either click  or on the *File* menu click *Scan…Start Scan.*
2. Follow the instructions on the screen, referring to your scanner documentation if necessary.

   Once the page is scanned and ejected, you are returned to FAXCOM Viewer with the scanned page displayed as part of the document.
3. Use any of the FAXCOM Viewer capabilities to work with the scanned image. (If the image is displayed with white text on a black background, on the *Process* menu click *Invert*.)

Printing a Document

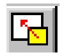
1. Either click , or on the *File* menu click *Print*.

2. In the *Print* box, specify whether to print all pages in the document or a specified page range only. Click OK.

Working with Pages

The following sections explain how the functions by which you can manipulate pages in the document being viewed.

Changing the Page Fit

1. *To fit the page width to the window*, either click , or on the ***Zoom*** menu click ***Fit Width***.

2. *To fit the page length to the window*, on the ***Zoom*** menu click ***Fit Length***.

3. To fit the entire page length in the window, on the ***Zoom*** menu click ***Fit Best***.

   (Unlike ***Fit Length***, whereby the page length is cut off when the window is reduced in size, ***Fit Best*** maintains the entire page length when the window is reduced in size.

4. To restore the page to its original size, on the ***Zoom*** menu click ***Original Size***.

Changing the Page Order

When you are viewing all pages in Thumbnail mode, you can change the order of the pages within the document, as follows:

1. In Thumbnail mode, on the ***View*** menu click ***Set Page Order*** to display each page with a number indicating its page order within the total number of pages.

2. Click each page to change its order within the document.

Copying a Page

When you are viewing all pages in Thumbnail mode, you can copy a page, as follows:

1. *To copy a single page*, in Thumbnail mode, click a page and on the ***Edit*** menu click ***Copy Page***.

2. *To copy multiple pages*, in *Thumbnail* mode, on the ***Edit*** menu first click ***Stack***, stack the pages, click the stack and on the ***Edit*** menu click ***Copy Page***.

3. To insert the copied page/copied stack within the current document, on the ***Edit*** menu click ***Insert Page***.

Deleting a Page

When you are viewing all pages in Thumbnail mode, you can delete a page (or stack of pages) and insert it in the current document, as follows:

1. *To delete a single page*, in Thumbnail mode, click a page and on the ***Edit*** menu click ***Delete Page***.

2. *To delete multiple pages*, in Thumbnail mode, on the ***Edit*** menu first click ***Stack***, stack the pages, click the stack and on the ***Edit*** menu click ***Delete Page***.

Displaying a Document in Thumbnails

1. To display all pages in a document, either click , on the ***View*** menu click ***View All Pages***, or double-click a page displayed in full-screen mode.

2. To exit Thumbnail mode, either double-click any of the displayed pages, or click **Previous**  or **Next** .

Going to the Next/Previous Page

1. *To display the previous page*, either click **Previous** , or on the **View** menu click ***Previous***.

2. *To display the next page*, either click **Next** , or on the ***View*** menu click ***Next***.

Going to the First/Last Page

1. *To display the first page*, on the ***View*** menu click ***First Page***.

2. *To display the* last *page*, on the ***View*** menu click ***Last Page***.

Going to a Specified Page

1. To display a specific page, on the *View* menu click *Go to Page*.
2. In the box that is displayed, click the specific page in the list and click OK.

Inverting Background and Foreground Colors

- On the *Process* menu, click *Invert* to cause a white background to be changed to black and black text to be changed to white (and vice versa).

Inserting a Page

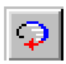
When you are viewing all pages in Thumbnail mode, you can copy a page (or stack of pages) and insert it in the current document, as follows:

1. *To copy a single page*, in Thumbnail mode, click a page and on the *Edit* menu click *Copy Page*.
2. *To copy multiple pages*, in Thumbnail mode, on the Edit menu first click Stack, stack the pages, click the stack and on the *Edit* menu click *Copy Page*.
3. To insert the copied page/copied stack within the current document, on the Edit menu click *Insert Page*.

Rotating a Page

To rotate a page 90° clockwise, you can either use a toolbar button or you can select the function from the *Process* menu.

Additional rotation functions are available from the *Process* menu.

1. *To rotate a page 90° clockwise*, either click , or on the *Process* menu, click *Rotate 90° CW*.
2. *To rotate a page 90° counter clockwise*, on the *Process* menu, click *Rotate 90° CCW*.
3. *To rotate a page 180°*, on the *Process* menu, *click Rotate 180°*.

4. *To rotate to a horizontal line,* on the ***Process*** menu, click ***Rotate to Horz-line***. Draw the horizontal line and then click with the mouse. The page is rotated to the angle of the horizontal line you drew.

5. *To rotate to a vertical line*, on the ***Process*** menu, ***click Rotate to Vert-line***. Draw the vertical line and then click with the mouse. The page is rotated to the angle of the vertical line you drew

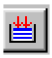
6. *To rotate to a specified angle*, on the ***Process*** menu, click ***Rotate Any Angle***. You are prompted to specify the angle in the *Enter a rotating angle* box. Specify the angle and click OK to rotate the page to the specified angle.

Stacking/Unstacking Pages

When you are viewing all pages in Thumbnail mode, you can stack a group of pages and then be able to copy/insert/delete all pages in the stack, as follows:

1. *To stack all pages in their current page order*, in Thumbnail mode, select all pages by holding down the shift key while you click each page.

2. Either click , or on the ***Edit*** menu click ***Stack***. The pages are stacked automatically.

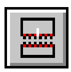
3. *To stack specified pages in a specified order*, in Thumbnail mode, click one page and then either click , or on the ***Edit*** menu click ***Stack***.

4. As appropriate, click and drag any page and place it on top of any other page.

5. *To unstack a stack of pages*, either click ***Unstack*** , or on the ***Edit*** menu click ***Unstack***.

Splitting a Multi-Page Fax

You can split a multi-page fax into separate, multiple faxes by doing the following:

1. To separate the fax into two faxes, one from the pages before the currently-viewed page and one from all pages forward, including the currently-viewed page, on the current page, either click  or select ***Split Here*** on the ***Edit*** menu. The fax is then split into two separate faxes.

2. To access additional options for splitting the fax, select ***Split…*** on the ***Edit*** menu.

3. In the dialog that is displayed, select the appropriate option and click **OK**, where

   All – splits the fax into individual pages. For example, selecting **All** for a 10-page fax results in 10 separate faxes.

   Current Page – separates the fax into two faxes, one from the pages before the currently-viewed page and one from all pages forward, including the currently-viewed page.

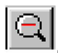
   Pages – enables you to specify individual pages or a range of pages to be split off from the fax. For example, specifying 7 in a 10-page fax results in page 7 being removed as a separate fax. Specifying 3-7 in a 10-page fax results in pages 3 through 7 being removed as a separate fax.

Manipulating an Image

The following section describes how you can manipulate an image by enlarging or reducing the image.

Zooming an Image

1. *To enlarge the image by 10%*, **either** click **Expand** , or on the ***Zoom*** menu click ***Expand***.

2. *To reduce the image by 10%*, either click **Reduce** , or on the ***Zoom*** menu click ***Reduce***.

3. To return the image to its original size, on the ***Zoom*** menu click ***Original Size***.

Working with Selected Areas of a Page

The following sections describe how you can manipulate a portion of a displayed image.

Copying and Moving Page Elements

You can select an element of a page and then copy it or move it.

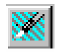
1. On the ***Edit*** menu, click ***Select***.
2. In the document window, press the left mouse button and drag the mouse to drag the selection window around the page element. Release the mouse button to display a shorthand menu.
3. Make the appropriate selection.
4. *If you selected Copy*, on the ***Edit*** menu, click ***Paste***. Drag the selection to the desired location and click the left mouse button to position the element.

   If you selected Move, drag the selection to the desired location and click the left mouse button to position the element.

Erasing an Image Area

To clear the area of the image over which you drag an eraser, you can either use a toolbar button or you can select the function from the ***Process*** menu.

Additional eraser functions are available from the ***Process*** menu.

1. *To clear the area of the image over which you drag an eraser*, either click  or on the ***Process*** menu click ***Eraser***. Hold down the left mouse button and drag the mouse to erase the area below the eraser. Click the right mouse button to end the eraser mode.
2. *To draw a rectangular area to be erased*, on the ***Process*** menu click ***Erase in Rectangle***. Hold down the left mouse button and drag the mouse to define the rectangular area. Release the button to erase the part of the image enclosed in the rectangle.
3. *To draw an area within a polygon to be erased*, on the ***Process*** menu click ***Erase in Polygon***. Hold down the left mouse button and drag the mouse to define the polygon. Double-click the button to erase the part of the image enclosed in the polygon.

Note: If you erase an area and then immediately decide you want to retain the erased area, on the *Edit* ***menu click*** *Undo*. ***Or, if you decide later in the editing process to retain the erased area, when you close the file and are prompted if you want to save the changes, click*** No.

Saving a Partial Image

1. Either click , or on the ***Edit*** menu click ***Select*** to define a rectangular area.
2. Either select ***Save Image*** from the shortcut menu that is displayed, or from the **File** menu click ***Save Partial Image***.
3. In the *Save As* dialog that is displayed, enter the name for the new image document in the *File name* box, and its location in the *Save in* box.

Manipulating an Area of a Page

1. To define a rectangular area of a page, either click , or on the ***Edit*** menu click ***Select***.

Drag the selection tool to define the area and display a shortcut menu with the following functions:

Fit to Window – fits the width of the defined area to the window

Cut – removes the defined area

Copy – copies the defined area

Move – lets you drag the defined area and then click to position it in another location

Zoom – lets you resize the defined area by dragging its selection handles and endpoints (function also available when you click **Zoom** on the **Edit** menu)

Save Image – displays the *Save As* dialog in order to save the defined area as a new file (a function also available when you click **Save Partial Image** on the **File** menu)

Touching up an Image

1. To edit a portion of the image displayed in FAXCOM Viewer, either click  or on the ***Process*** menu click ***Touch Up***.
2. Position the selection box over the portion of the image to be zoomed and click with the left mouse button to zoom the selected portion of the image.

3. As appropriate, click the mouse in a square of the zoomed image grid to clean up the image – either by adding black or removing black from a square.
4. When done, click the **Close** button to close the zoomed portion of the image.

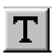
Working with Annotations

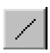
The following sections explain how you can add text, lines and highlighting to a document being viewed.

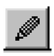
Annotating a Document

On the ***Annotate*** menu, or from the **Annotation toolbar**, you can click any of the following functions to:

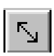

select your annotation (to move, modify or remove it)


add text

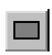

draw straight lines

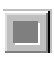

draw curved lines (also called Freehand)


draw a line ending with an arrowhead

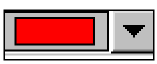

draw a line beginning and ending with an arrowhead


draw a line that branches off at different angles


highlight a rectangular area


delete a selected annotation

select line thickness


select the color of annotations

Refer to the “Showing/Hiding the Annotation Toolbar” section earlier in this chapter for instructions for displaying the toolbar.

Selecting an Annotation

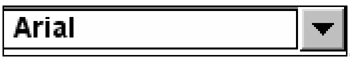
In order to move, modify, or remove an annotation, you must first select it, as follows:

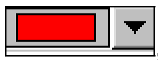
1. Either click , or on the ***Annotate*** menu click ***Pick Up***.
2. Click the annotation (i.e., lines or text you have entered).
3. As appropriate, drag the annotation to move it, modify it (by changing the color and thickness of lines, and the font, size and style of text), press **Delete** to remove it.

Modifying an Annotation

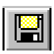
You can modify a line you have added by changing its color and thickness. You can modify text you have added (by changing its font, size and style), as follows:

1. Select the annotation, either by clicking , or on the ***Annotate*** menu clicking ***Pick Up***.
2. Click the annotation (i.e., lines or text you have entered).
3. *To change the thickness of a line*, either click **Thickness** 

, or on the **Annotate** menu click **Change Line Thickness**.
4. *To change the font size and style of text*, either click **Font Size** 

, or on the ***Annotate*** menu click ***Change Font***.
5. *To change the color of lines and text*, either click **Color** , or on the ***Annotate*** menu click ***Change Color***.

Making Annotations Permanent

1. Either click , or on the **File** menu click **Save**.
2. If you have used any of the Annotation tools (except the Text tool) to make changes, you are prompted whether you want to merge the annotations with the original image.

3. Click *Yes* to make the annotations permanent by fusing them to the page; click *No* to retain the annotations as an overlay on the original image that can still be modified (resized, copied, moved, etc.).

   Text you have input is automatically saved and merged.

4. To be able to assign a new name to a document, or save it in another file location, click **Save As** (rather than **Save**) and enter the new name in the File name box, and the new location in the Save in box.

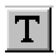
Merging Annotations

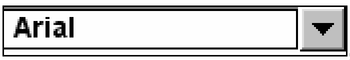
When you attempt to save a document, and have used any of the Annotation tools (except the Text tool) to make changes, you are prompted whether you want to merge the annotations with the original image).

Click *Yes* to make the annotations permanent by fusing them to the page; click *No* to retain the annotations as an overlay on the original image that can still be modified (resized, copied, moved, etc.).

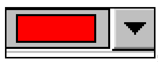
Text you have input is automatically saved and merged.

Adding Text

1. To add text to a document, **either** click **Text** , or on the ***Annotate*** menu click ***Text***.

2. *To specify the font size and style*, either click **Font Size** 

, or on the ***Annotate*** menu, click ***Change Font*** and make your selections.

   To specify the font color, either click **Color** , or on the ***Annotate*** menu, click ***Change Color*** and make your selection.

3. Type your text, and either click **Pick Up** , or on the ***Annotate*** menu click ***Pick Up*** to select it and apply your color selection.

4. Click the text.

5. *To change the font size and style*, either click **Font Size** Arial, or on the ***Annotate*** menu, click ***Change Font*** and make your selections.

   To change the font color, either click **Color**, or on the ***Annotate*** menu, click ***Change Color*** and make your selection.

6. *To move or remove the text*, either click **Pick Up**, or on the ***Annotate*** menu click ***Pick Up***.
7. Click the text you have entered.
8. As appropriate, drag the text to move it or press **Delete** to remove it.

Drawing Lines

1. *To draw a straight line*, either click **Line** or on the ***Annotate*** menu click ***Line***.

   To draw a line with one arrow, either click **1-Arrow Line** or on the ***Annotate*** menu click ***Line with 1 Arrow***.

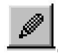
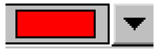
   To draw a line with two arrows, either click **2-Arrow Line**, or on the ***Annotate*** menu, click ***Line with 2 Arrows***.

   To draw a curved line (also referred to as free hand), either click **Free Hand**, or on the ***Annotate*** menu click ***Free Hand***.

   To draw a line that branches at an angle, either click **Polyline**, or on the ***Annotate*** menu click ***Polyline***.

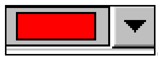
2. *To specify the line width and color*, either click **Color**, or on the ***Annotate*** menu click ***Change Color.***
3. *To move or remove the line*, either click **Pick Up**, or on the **Annotate** menu click ***Pick Up***.
4. Click the line.
5. As appropriate, drag the line to move it or press **Delete** to remove it.

Drawing a Free Hand Line

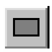
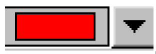
1. To draw a curved line (also referred to as free hand), either click , or on the ***Annotate*** menu click **Free Hand**.
2. *To specify the line width and color*, either click **Color** , or on the ***Annotate*** menu click ***Change Color***.
3. *To move or remove the line*, either click , or on the ***Annotate*** menu click ***Pick Up***.
4. Click the line.
5. As appropriate, drag the line to move it or press **Delete** to remove it.

Drawing a Filled Rectangle

Highlighting a rectangular area draws a filled rectangle, as follows:

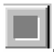
1. Either click **Highlit**, or on the ***Annotate*** menu, click ***Highlight***.
2. To specify the highlight color, either click , or on the ***Annotate*** menu, click ***Change Color*** and make your selection.

Highlighting an Area

1. To highlight a rectangular area, either click , or on the ***Annotate*** menu, click ***Highlight***.
2. To specify the highlight color, either click , or on the ***Annotate*** menu, click Change Color and make your selection.

Note: Yellow is the recommended color for highlighting.

Deleting an Object

To remove a selected annotation, either click , or on the ***Annotate*** menu click ***Pick Up***. Press the **Delete** key. You can also click , or on the ***Annotate*** menu click ***Pick Up***, then click ***Delete Object*** .

Using a Rubber Stamp Annotation

The Rubber Stamp function enables you to stamp the image with a previously-created Bitmap or TIFF file. You can also include the date and/or time as part of the stamped image.

1. On the ***Annotate*** menu, select ***Stamp***.
2. Click the **Browse** button and select the stamp file (.bmp or .tif) from your file listing and be returned to the Select a Stamp dialog.

Note: Even though the stamp will be displayed as a black and white image, you can select a color image as long as it contains less than 256 colors.

3. *To add the current date to the selected stamp file*, click the **Font** button to select the appropriate font style and size, then click the **Date** button; click the left mouse button to position the date on the stamp image preview, then click **OK**.
4. *To add the current time to the selected stamp file*, click the **Font** button to select the appropriate font style and size, then click the **Time** button; click the left mouse button to position the time on the stamp image preview, then click **OK**.
5. To add only the selected stamp file, click **OK**.
6. Position the stamp frame where you want it and then click the left mouse button to fix it in place.

Chapter Six: Using the Pending Queue and Viewing the Activity Log

> ***Note: You can specify whether the FAXCOM Client displays or hides the Pending Queue and/or Activity Log, as follows: either click the*** *Options* ***toolbar button and select*** Viewer/Log Options ***or select*** Tools…Options…Viewer/Log Options***. In the Display Options box, select the Pending Queue and/or Activity Log checkbox to display the Pending Queue/Activity Log; clear the boxes to hide the Pending Queue/Activity Log. Click*** *OK****.***

Using the Pending Queue

The Pending Queue lists all faxes queued for transmission and enables you to see what place your jobs occupy in the queue. You can select your own jobs and make last-minute changes to their transmission status and destination fax number. When selecting faxes, you can use **Ctrl-A** to select all faxes.

If you checked the **Preview** checkbox on the Send Fax dialog when sending the fax, you can also preview the outgoing fax from the Pending Queue.

Do the following to access and use the Pending Queue:

1. Either select *Logs…Pending Queue* or click the Pending Queue item in the Folder list to display the Pending Queue (Figure 6-1).

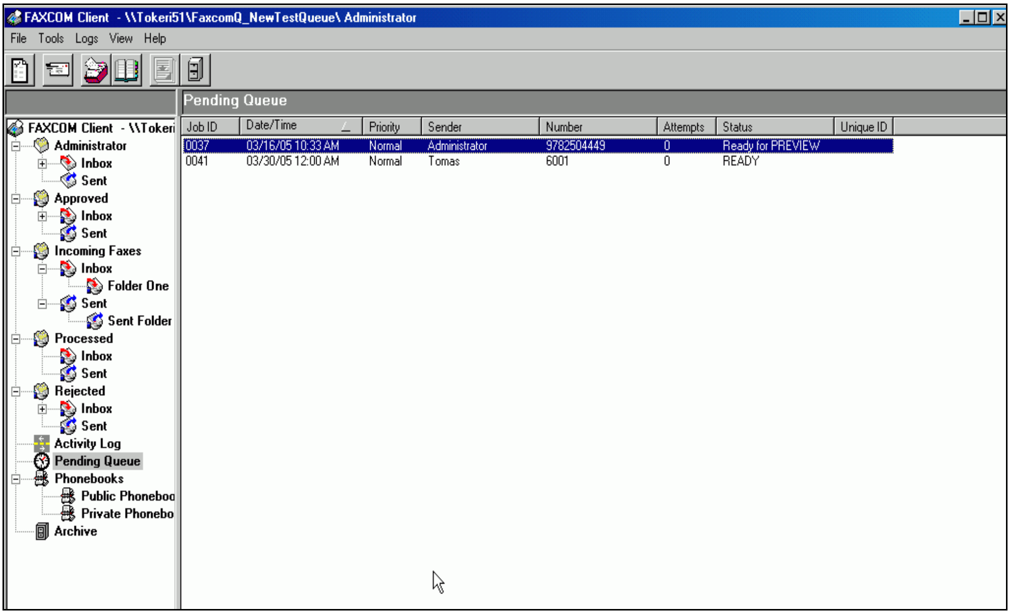


Figure 6-1. Pending Queue

2. View the following information:

   Job ID – 4-digit number used to track a fax

   Unique ID

   Date/Time – when the fax is to be transmitted

   Priority – specified for transmission

   Sender – name of the originator of the fax

   Number – destination fax number

   Attempts – number of transmission attempts already executed

   Status – condition of the fax, either

   Ready – to be delivered to the fax server

   Active – already delivered to the fax server

   Hold – kept from being delivered to the fax server. If you put an Active job on hold, the Status is indicated as ACT/HLD, and further retries are prevented after the current transmission attempt concludes.

If you chose to preview the message before sending, the following additional status conditions apply:

Submitting PREVIEW

Preparing PREVIEW

Ready for PREVIEW

3. If appropriate, click the column headings to toggle between an ascending/descending sort.
4. *To add/remove columns*, right-click anywhere in the Pending Queue and select ***Add/Remove Columns*** from the shortcut menu; in the Select Columns dialog that is displayed, select the *Display Selected Columns* radio button, then check/uncheck the specific columns to add/remove. Click **OK** to be returned to the Pending Queue with your selections enabled.
5. If desired, right-click and select ***Only User's Faxes*** from the shortcut menu to display only your jobs.

   If appropriate, right-click and select **Other User's Faxes** from the shortcut menu to select other user accounts to which you have been given Share Rights.

   If appropriate, right-click and select **Faxes to Authorize Only** if you have been configured by the fax service administrator to authorize outgoing faxes sent by others.
6. *To change the destination fax number, transmission priority or the time of transmission*, highlight an entry and right-click to display the shortcut menu; select ***Change***.

   If you selected a single entry:

   In the Change Pending Entry box that is displayed, enter the new number. Click the appropriate **Schedule** button. If you selected **Delay**, enter the date and time of the delayed transmission.

   In the **Priority** box, select another priority from the choices available to you.

   Click **OK** to be returned to the Pending Queue with the entry changed.

   If you selected multiple entries:

Be aware that the changes you make to Schedule and Priority apply to **all** selected faxes. You can, however, select the ***No Change*** radio button to retain the original scheduling specified for **each** fax.

To place a fax on Hold, highlight the entry, right-click to display the shortcut menu and select ***Hold***.

If you put a fax on Hold that was Active, the status changes to ACT/HLD, meaning no more retry attempts will take place after the current one.

If the current attempt is successful, or if it is the last retry attempt, the fax will be removed from the queue. If the current attempt fails and there are more retries, the fax will be put on Hold.

The purpose of holding an Active fax is to enable you to change or delete an active fax without being forced to monitor the Pending Queue to wait for the fax attempt to conclude.

7. *To authorize/reject a fax that requires your authorization*, select a fax whose **Status** is *Ready for AUTHORIZATION*, right-click and select either **Authorize**/**Reject**... as appropriate. ***If you select Authorize***, the fax is immediately released for transmission. ***If you select Reject...***, in the Reject Fax dialog that is displayed, specify a note (perhaps explaining why the fax was rejected), and click **OK**.
8. *To release a fax from being on Hold*, highlight the entry, right-click to display the shortcut menu and select ***Release***.
9. *To delete one of your faxes*, highlight the entry, right-click to display the shortcut menu and select ***Delete***.
10. *To preview an outgoing fax*, select the appropriate fax entry for which the Status is *Ready for PREVIEW* and do either of the following:
    - Click the fax to open it in the Viewing pane
    - Right-click the fax and select ***Preview*** from the shortcut menu to open it in the fax viewer whose application path you specified on the Viewer/Log Options tab

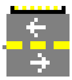
If you have opened the outgoing fax in the Viewing Pane, with the fax entry selected, right-click and select ***Release*** from the shortcut menu to actually send the fax.

If you have opened the outgoing fax in the FAXCOM Viewer, select ***File…Release Fax*** to actually send the fax.

If you have opened the outgoing fax in another fax viewer, exit the viewer and return to the Pending Queue. With the fax entry selected, right-click and select Release from the shortcut menu.

Viewing the Activity Log

The Activity Log lists all attempted fax transmissions, both successful and unsuccessful, and any received faxes – for the entire fax service. On the Viewer/Log Options tab (Figure 1-6) you can choose whether or not to display the Activity Log (as well as Pending Queue). If you have chosen to display the Activity Log, do the following to view the Activity Log:

1. Either select *Logs…Activity Log* or from the Folders list, select the **Activity Log** item  to display the Activity Log.

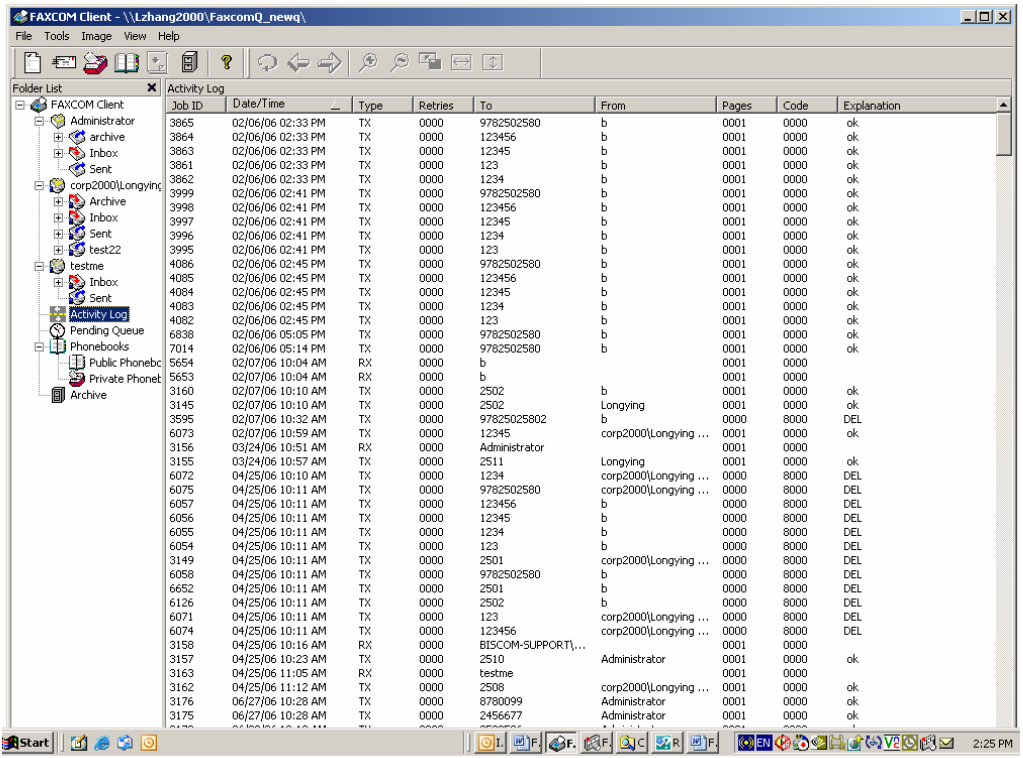


Figure 6-2. Activity Log

View the following information:

Job ID – unique identifying number assigned by the fax service to track the fax

Date/Time – date/time when transmission was completed

Type – type of fax attempt, either Tx for a transmission attempt, or Rx for a received fax

Retries – how many retries were made to transmit the fax, not including this entry. This field is preceded by an asterisk when the attempt is the final one

To – destination fax number

From – name of the originator of a transmitted fax, or FAXCOM, for a received fax

Pages – number of pages of the fax

Code – status code for an unsuccessful transmission; a code of 0000 indicates the transmission was successful; all other codes are error codes

Explanation – 4-letter abbreviation for the status code if the transmission was unsuccessful, for example, voic, nois, noan, busy

Connect – amount of time in seconds on the phone line to transmit the fax

Speed – baud rate at which the exchange was made, either 14400, 12000, 9600, 7200, 4800 or 2400

To display messages sent from the HeartBeat monitoring service, right-click anywhere in the Activity Log and click ***Show HeartBeat Messages***. A checkmark then appears to the left of Show HeartBeat Messages menu option. Repeat this step to stop the display of HeartBeat messages. (The HeartBeat monitor is an optional service that sends test faxes to verify the capability of the system to successfully send/receive faxes. Once a test job is either successfully delivered or fails to be delivered, a delivery status message is returned from the FAXCOM Server to the FAXCOM Queue to the user mailbox from which the fax was sent.)

To add/remove columns, right-click anywhere in the Activity Log and select ***Add/Remove Columns*** from the shortcut menu. In the Select Columns dialog that is displayed, select entries in the *Available Columns* list and move them into the *Displayed Columns* list, either by double-clicking the entries or by using the **Add**/**Add All** buttons. Remove entries from the *Displayed Columns* list, either by double-clicking the entry or using the **Remove**/**Remove All** buttons. Click the **Move Up**/**Move Down** buttons as appropriate to cause the entry to move to the left-hand/right-hand side of the Activity Log. Click **OK** to be returned to the Activity Log with your selections enabled.

To print the Activity Log, right-click anywhere within the log to display the shortcut menu and select ***Print*** to display the Print dialog. Click **OK** to send the Activity Log to the selected printer.

Status Codes and Explanations

While, in theory, it is possible to receive any of 100+ different status codes (error codes) for a fax transmission in the fax service logs, typically there are only about 20 codes that you will see on a regular basis. They are:

0000	All pages OK
0001	Lost communication with called fax machine
0002	Received page quality deemed unacceptable by fax machine
0003	Faxcom unable to transmit due to noisy phone connection
0004	Faxcom detected voice answer; please check the number
0005	Early Disconnect. Remote fax requested a disconnect before image was transmitted.
0006	Late Disconnect. Remote fax requested disconnect after image was transmitted.
0007	No dial tone detected
0013	Called fax machine busy
0014	Phone network busy
0015	Called phone number ringing but no answer
0016	Incompatible Group I fax
0017	Incompatible Group II fax
0018	Non-fax modem detected
0021	No destination phone number specified
0030 - 0041	Fax port modem errors
0050	After dialing, no telephone network response
671	Error converting attachment to fax format
8000	This job was manually deleted

Chapter Seven: Using Phonebooks

Other than the fax service administrator, only an individual designated as a Public Phonebook manager can manage the Public phonebook. Individual users can, however, always view the Public phonebook and select fax recipients from it when sending a fax. They can also create their own Private phonebook, and automatically add fax recipients to it when addressing a fax.

Add Users and Groups to the Public Phonebook

The Public phonebook is automatically created for you. To add/modify/remove individual users and groups in the Public phonebook, follow the instructions in this chapter for adding/modifying/removing users and groups in a Private phonebook.

Instead of selecting the Private phonebook *, however, you either select the Public phonebook toolbar button*  *or select* 

from the Folder list to display the Public phonebook.

Adding Entries to a Private Phonebook

You can open your Private phonebook to directly add fax recipients, or you can automatically add fax recipients to your Private phonebook from the Send Fax dialog when you are sending a fax.

Do the following to add entries directly to your Private phonebook:

1. Either click the **Private Phonebook** toolbar button  or select ***Phonebooks…Private Phonebook*** from the Folder list to display the Phonebook dialog. Right-click and select **New Entry**.

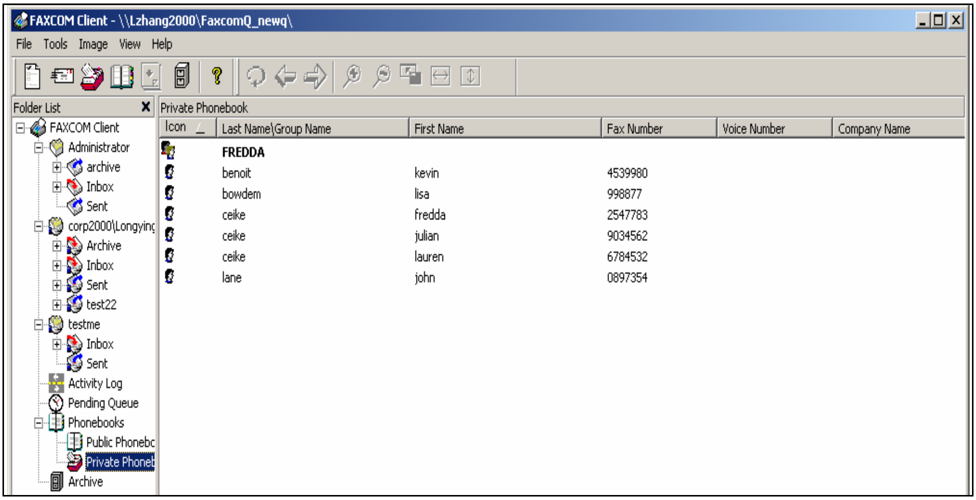


Figure 7-1. Private Phonebook

Note: You can also select the Private phonebook in the Folder list, right-click to display the shortcut menu and select Add Entry – or select File…New…Private Entry to display the Phonebook Record – Add dialog (Figure 7-2)*.*

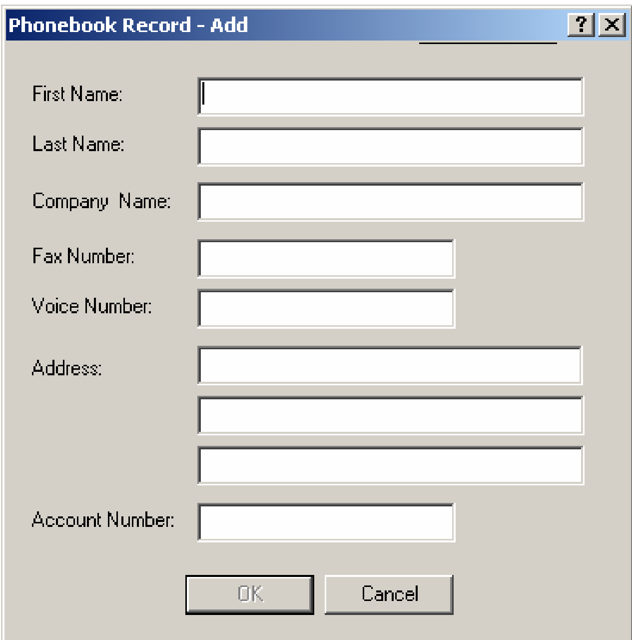


Figure 7-2. Phonebook Record – Add Dialog

2. Using the TAB key to move between fields, enter information in the fields. The following field must be filled in:

   - **Fax Number** (up to 39 digits)

   The other fields are optional and each allows up to a maximum of 29 characters, except for Account Number (used with the Accounting function), which allows a maximum of 10, and the First Name and Last Name fields, which allow a maximum of 19. (If you are using the Accounting function, consult with your fax service administrator for valid account numbers.)

   After you have entered the appropriate information, click **OK**.

3. Continue to add entries as needed, using the same procedure.

4. To make changes to an entry you have already added, select the entry, right-click and select ***Modify*** from the shortcut menu.

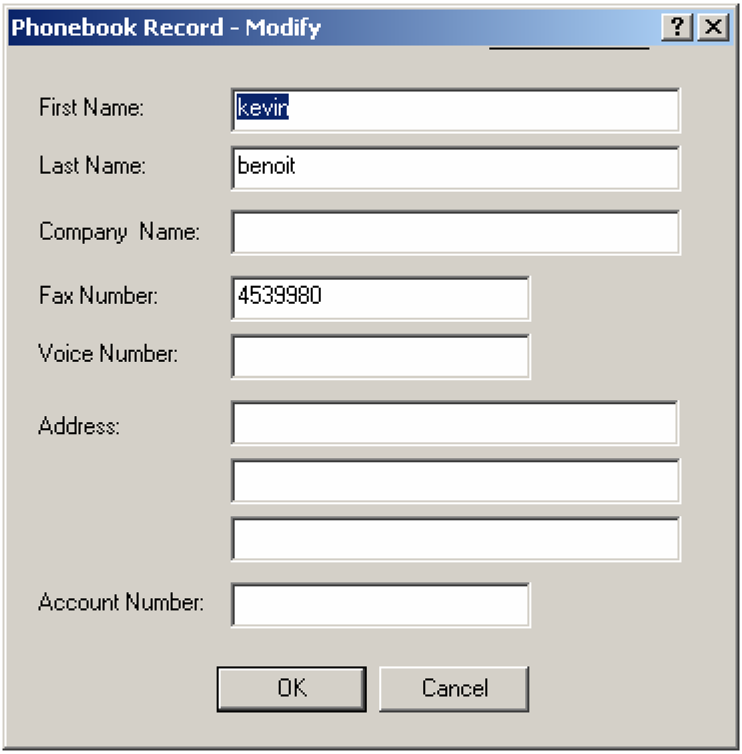


Figure 7-3. Phonebook Record - Modify Dialog

5. To delete an entry, select the entry, right-click and select ***Delete*** from the shortcut menu. When prompted to confirm the deletion, click *Yes* to remove the entry; click *No* to retain the entry; click *Yes to All* to delete multiple selected entries; click *Cancel* to exit without deleting.

Adding a Private Phonebook Group

Do the following to create a group of fax recipients in your Private phonebook:

1. Either click the **Private phonebook** toolbar button  or select 

from the Folder list to display the Phonebook. Right-click and select ***New Group***.

Note: you can also select the Private phonebook in the Folder list, right-click to display the shortcut menu, and select Add Group ***– or select File…New…Private Group.***

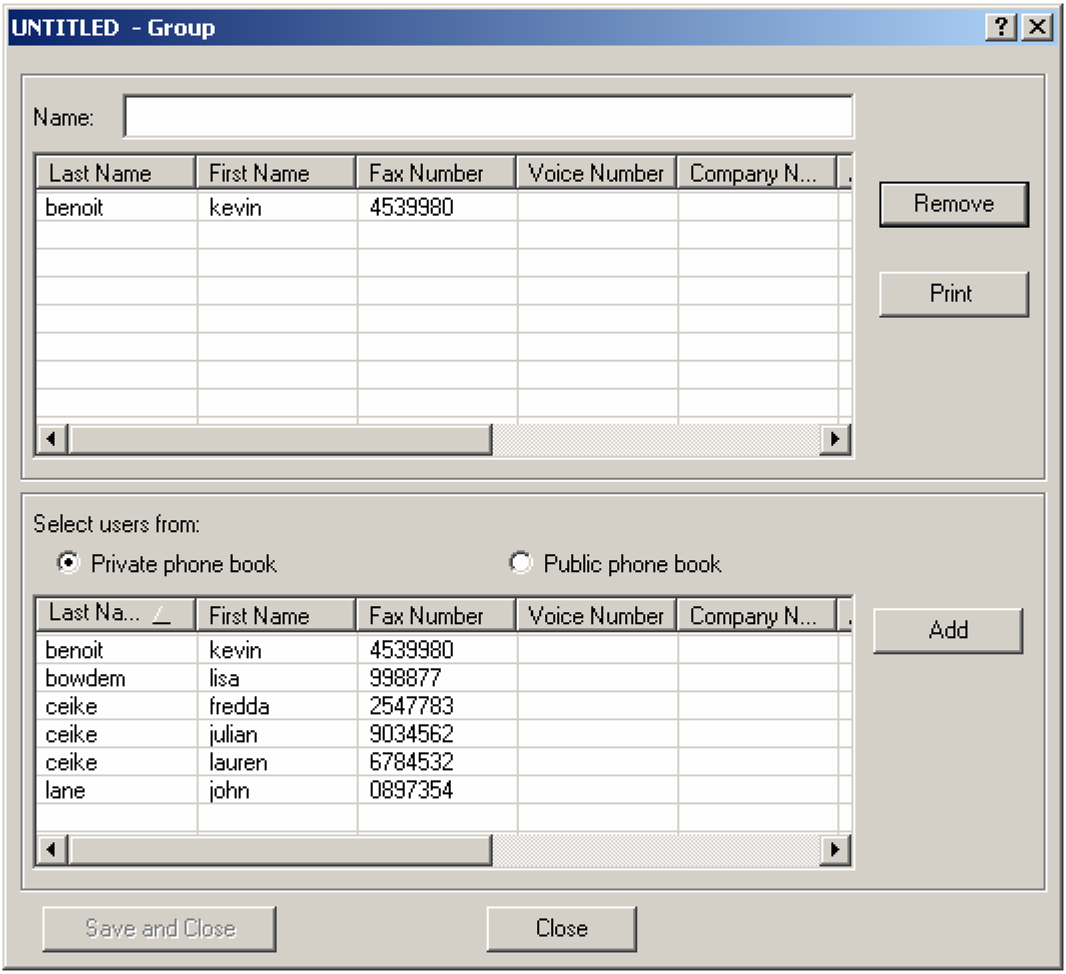


Figure 7-4. Add New Group Dialog

2. In the **Name** field, enter the (case-insensitive) name of the new group.

3. Select either the **Private** or **Public** phonebook radio button according to whether you want to select users from the Private or the Public phonebook. Select any entry that you want to add to the group, and then click the **Add** button. (To remove an entry you have added to the group, select the entry and click the **Remove** button.)

   When you have finished adding entries, click **Save and Close.**

4. To make changes to a group you have already added, select the group, right-click and select *Modify* from the shortcut menu.

5. To print a listing of the group members that includes the information specified for the individual member when he/she was added to the User List, select the group within the phonebook, right-click and select ***Print***. Be aware that you can also perform the same function by clicking the **Print** button when adding/modifying a specific group in the Group dialog.

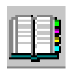
Removing a Private Group

Do the following to remove a Private group:

1. Either click the **Private phonebook** toolbar button  or select *Phonebooks…Private Phonebook* from the Folder list to display the phonebook.
2. Select the group to be removed, right-click to display the shortcut menu and select ***Delete***.
3. When prompted to confirm the deletion, click *Yes* to remove the group; click *No* to retain the group; click *Yes to All* to delete multiple selected groups; click *Cancel* to exit without deleting.

Sending a Fax from a Phonebook

When you are viewing either the Public phonebook or your Private phonebook, you can select users/groups and automatically be transferred to the Send Fax dialog to send a fax to the users/groups.

1. Select either your Private phonebook  or the Public phonebook .
2. Select the appropriate fax recipient users/groups, right-click and select ***Send Fax*** from the shortcut menu to be transferred to the Send Fax dialog in order to send a fax to the selected users/groups.
3. Continue the process of addressing, creating and sending the fax.

Viewing the Public Phonebook

Other than the fax service administrator, only an individual designated as a Public Phonebook manager can manage the Public phonebook. Individual users can, however, view the Public phonebook and access it from the Send Fax dialog to select fax recipients. Do the following to view the Public phonebook:

1. Either click the **Public Phonebook** toolbar button  or from the Folder list, select the **Public Phonebook** item.
2. If appropriate, click the column headings to toggle between an ascending/descending sort.
3. *To add/remove columns*, right-click anywhere in the phonebook and select ***Add/Remove Columns*** from the shortcut menu; in the Select Columns dialog that is displayed, select the **Display Selected Columns** radio button, then check/uncheck the specific columns to add/remove. Click **OK** to be returned to the phonebook with your selections enabled.
4. *To print the phonebook*, right-click anywhere within the phonebook to display the shortcut menu and select ***Print*** to display the Print dialog. Click **OK** to send the phonebook to the selected printer.
5. *To view the details specified for a particular user/group*, highlight the user/group and right-click to display the shortcut menu; select ***View***; click **OK** to be returned to the phonebook.
6. *To send a fax to a particular user/group*, highlight the user/group and right-click to display the shortcut menu; select **Send Fax**… to be automatically transferred to the Send Fax dialog.

Importing Fax Recipients to a Phonebook

You can import an existing phonebook database into a FAXCOM Client phonebook by following these basic steps:

- Export your phonebook to a comma or tab delimited ASCII file
- Create an Import definition file
- Run the Import utility

Export your Phonebook to a Comma or Tab Delimited ASCII File

To export your phonebook to a comma or tab delimited ASCII file, follow the instructions in your phonebook manual.

Follow these FAXCOM Client considerations when exporting:

- Each entry must contain at least a recipient name and fax number
- The length of each entry is up to 1023 characters
- The fax number must contain all numbers needed to complete the call (i.e., a leading 1 for long distance calls, 011 for international calls, etc.).
- Sorting the ASCII file by last name reduces the running time of the conversion

The following is an example of a comma delimited file:

```
"Clarke", "Nancy", "Biscom", "1-978-250-8877", "1-978-250-1900",
"321 Billerica Road", "Chelmsford", "MA", "01824", "Capricorn"
```

Create an Import Definition File

Your Import definition file tells the import utility how to interpret each field in the ASCII file being imported. Follow these FAXCOM Client considerations:

- You can use any text editor to create the keyword header file
- If the file contains any fields longer than the length showed in the list below, it is truncated
- The keyword header file must exist in the same directory as the ASCII phonebook file, with the same name as the ASCII file, but with the .DEF extension. (The header file for PH_BOOK.TXT would be PH_BOOK.DEF.)
- The order of the keywords in the file must correspond to the data in the ASCII file.

The following list gives valid keywords and the fields they represent:

KEYWORD	FIELD	LENGTH
"NAME_LF"	last-first name	Characters divided into 19-character last name and 19-character first name
"NAME_FL"	first-last name	Characters divided into 19-character first name and 19-character last name
"NAME_L"	last name only	19
"NAME_F"	first name only	19
"COMPANY"	company name	29
"FAX_PHONE"	fax phone number	39
"PHONE"	voice phone number	29
"ADDRESS"	address line 1	29
"ADDRESS2"	address line 2	29
"CITY"	city	
"STATE"	state	City, state, zip and country share 29
"ZIP"	zip	
"COUNTRY"	country	
"ACCOUNT"	account number	20
"OTHER" or " "	any other information	(While "OTHER" and " " can be used multiple times, the information is not used by FAXCOM Client

The following is a keyword header file that matches the sample text file in the preceding section:

```
"NAME_L", "NAME_F", "COMPANY", "FAX_PHONE", "PHONE", "ADDRESS",
"CITY", "STATE", "ZIP", "OTHER"
```

Run the Import Utility

Do the following to merge a phonebook (that was first exported to a comma or tab-delimited ASCII file) into a FAXCOM Client phonebook:

(You must also have first created an Import definition file to tell the Import utility how to interpret each field being imported.)

1. Select *Tools...Phonebooks...Import* to display the Import Phonebook dialog showing the Input File options and the Destination options.

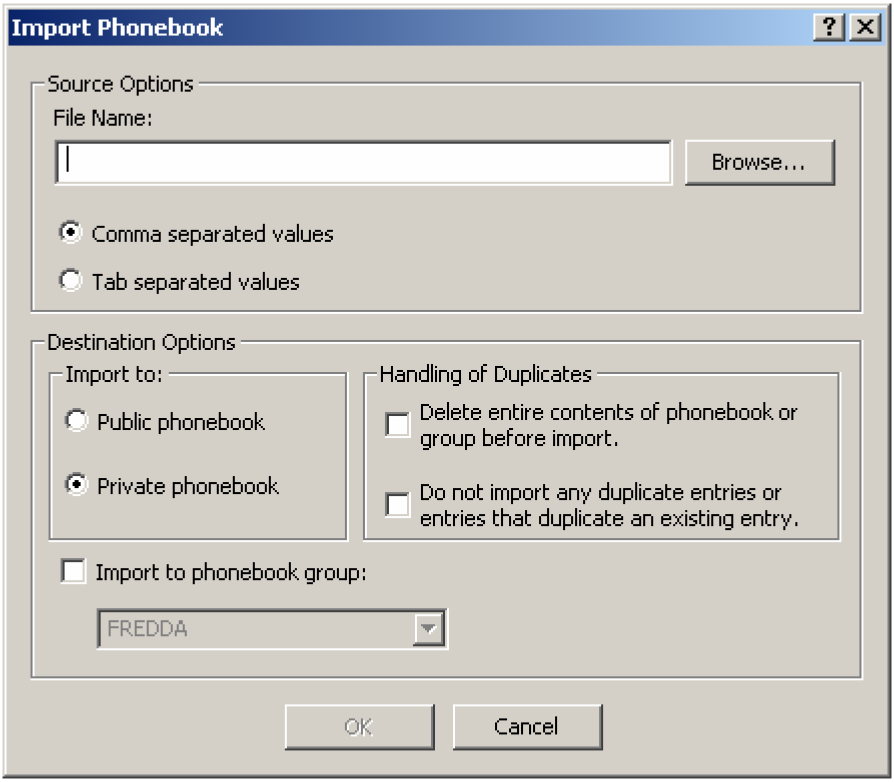


Figure 7-5. Import Phonebook Dialog

2. Fill in the dialog as follows and click **OK** when done:

   Either specify a Source File Name or click the **Browse...** button to select the file from your file directory

   Select the appropriate radio button, either *Comma separated values* or *Tab separated values* for the delimiter used in the Source file.

   Select the appropriate radio button, either *Public phonebook* or *Private phonebook* to select the destination phonebook.

   To import into a specific group of fax recipients within the phonebook, check the **Import to group** checkbox and specify/select the specific group. You can also type in the name of a new group to create the group on-the-fly.

3. Select how you want duplicate entries to be handled, where duplicate entries (both within the Source file itself and between the Source file and the

destination) are defined as one in which the fax number and the name and/or company **only** are the same, as follows:

Duplicates:

LAUREN	9877958440	LAUREN	9877958440	
BISCOM	5268240019	BISCOM	5268240019	

Not Duplicates:

LAUREN	9877958440	LAUREN	9877958440	BISCOM
BISCOM	5268240019	BISCOM	5268240019	LAUREN

Since checking for duplicate entries significantly extends the time duration of the import, you are given the following options for handling duplicate checking (where you can check/uncheck either option or both options):

Delete entire contents of phonebook or group before import – *if checked*, specifies that the destination phonebook/group be emptied before the import, eliminating any need to check for duplicates between the Source file and destination. *If unchecked*, the contents of the destination phonebook/group remains intact.

Do not import any duplicate entries or entries that duplicate an existing entry – *if checked*, specifies that the Import utility detect duplicates both within the source file itself and between the Source file and destination; when it detects duplicates within the Source file, it imports only the first of any duplicate entries; when it detects duplicates between the Source file and the destination, it does not import the duplicate entry from the Source file. *If unchecked*, specifies that no duplicate checking take place, either within the Source file itself, or between the Source file and the destination.

4. To verify the exact number of records read/imported, as well as the Import configuration settings, open the log file created by the Import utility in any text editor. The log file is located in the same directory as your Source file, with the same file name. For example, the log file created for C:\pbook.txt is C:\pbook.log.

   The log file lists any invalid records in your Source file, where an invalid record is one that lacks a fax number. If appropriate, add a fax number to the invalid records and run the Import again for only the invalid records. The file also lists any entries longer than the maximum field length that were truncated.

Exporting from a FAXCOM Client Phonebook

You can export an existing FAXCOM Client phonebook into a comma delimited ASCII file. You can copy the exported file to any application that recognizes a comma delimited file – including merging multiple FAXCOM Client phonebooks into one. To merge FAXCOM Client phonebooks, you would:

- Export the entire phonebook or phone group to a comma delimited file
- Import the file to a phonebook or group

Do the following to export a phonebook:

1. Select *Tools...Phonebooks...Export* to display the Export dialog.

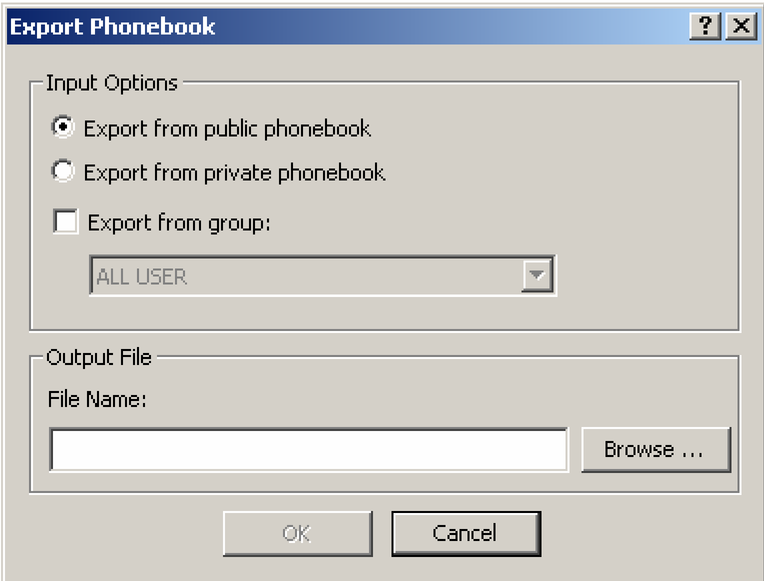


Figure 7-6. Export Phonebook Dialog

2. Select *Export from public phonebook* to export from the Public phonebook or *Export from private phonebook* to export from a Private phonebook.
3. Check the **Export from group**: checkbox to export from a specific phonebook group (which you select from the dropdown list.
4. Either specify the Output File Name (including full path) or click the **Browse**... button to select the file from your file listing. Click **OK**.

The Export utility creates a comma delimited ASCII file, with an associated Import definition file you can use when importing. The file name of the definition file will be the same as that of t he export file, but with a .def extension.

Chapter Eight: Using the Archive Function

You can archive folders of faxes either to a network location or to a CD. If appropriate, you can then later connect to the archive location in order to restore the archived faxes.

Sending Faxes to an Archive Location

Do the following to archive folders of faxes either to a network location or to a CD:

1. Select a folder of faxes in the left pane, right-click and select *Send to Archive…*.
2. In the dialog that is displayed, specify the archive location or click the **Browse…** button to select it, then click **OK.**
3. If a password is desired, specify the appropriate password. ***Be aware that if you will then be allowing other individuals to connect to this archive, you will have to communicate to them the archive location and password in order for them to connect. You, however, as the owner of the archive, and the fax service administrator, do not need to specify a password in order to connect to the specified archive location.***
4. As appropriate to your needs, select (check) the **Include subfolders** checkbox for the archive to include any subfolders beneath the selected folder, the **Merge contents** checkbox to flatten any subfolders' contents into the parent folder, and/or the **Delete after Archived** checkbox to delete the archived faxes. (If you select **Delete after Archived**, you are prompted to confirm the archive process.)

   If archiving to an archive location where you previously archived faxes and/or if you selected Merge contents, the Confirm Archive Operation dialog is displayed (Figure 8-1), asking you to specify how to handle duplicate files it detects (i.e., files of the same filename.

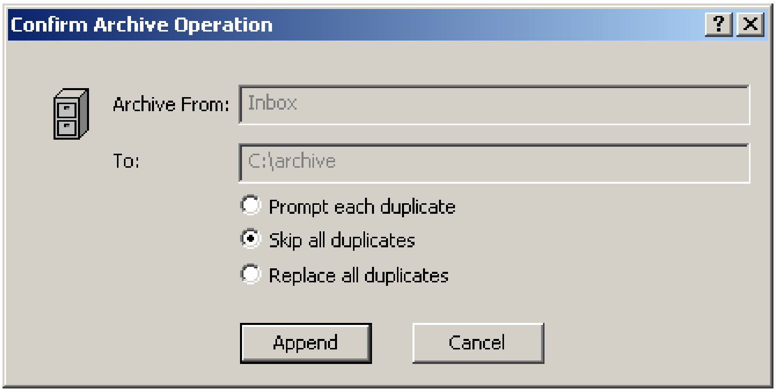


Figure 8-1. Confirm Archive Operation Dialog

5. Select the appropriate radio button, clicking **Append** when done:

   Prompt each duplicate – specify that the Archive process notify you whenever it detects a duplicate file and ask you how to proceed

   Skip all duplicates – to pass over and **NOT** archive – all faxes whose filename is a duplicate of a previously-archived fax

   Replace all duplicates – to replace all previously-archived faxes with all newly-archived faxes whose filename is a duplicate

   *If a duplicate is detected and you selected **Prompt each duplicate***, the Handle Duplicate Image File dialog is displayed, asking you how to handle the duplicates.

6. Select the appropriate radio button, clicking **OK** when done:

   Skip ALL image files – specifies that the program pass over and NOT archive all faxes whose filename is a duplicate of a previously-archived fax.

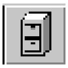
   Replace ALL image files – specifies that the program replace all previously-archived faxes with all newly-archived faxes whose filename is a duplicate.

   Cancel Archive process – specifies the Archive process end and do a clean-up of any archiving that has already taken place (i.e., it will be as if you have never started the Archive process).

   Abort Archive process – specifies the Archive process end, leaving the remains of whatever archiving has already taken place.

Restoring Faxes from an Archive Location

Once you have sent folders of faxes to an archive location, you can do the following to restore (i.e., access) the archived faxes as follows:

1. Either select *File…Connect to Archive*, click the **Archive** button  in the toolbar, or select the Archive icon in the left pane, right-click and select *Connect…*.
2. In the *Archive Path* field, either specify the archive location or click the **Browse** button to select it.
3. *If the Archive location requires a password*, enter the password. Click **OK**. The Archive location is then displayed at the end of the folder list.

Be aware that it is not necessary for the owner of the archive or the fax service administrator to specify a password in order to connect to the archive. If a password has been specified for the archive, it is only individuals other *than the owner and the fax service administrator who must be informed of the password in order to access the archive.*

4. To disconnect from an archive, select the archive location in the folder list, right-click and select *Disconnect*.

Note: You must reconnect to an archive each time you launch the FAXCOM Client. The archive location is not maintained after you close the application.

Chapter Nine: Using Additional Tools

In addition to the basic selections in the *Tools* menu (*Options* [documented in Chapter One]; *Change Password* [documented in Chapter One]; *Phonebooks* [documented in Chapter Seven]), you may have all of the following selections as well (depending on how your fax service administrator has configured you).

- Advanced Fax Routing (displayed only if you are configured to access the utility)
- Out of Office (always displayed, but used only if you or the fax administrator has created an Advanced Fax Routing rule action to execute when the Out-of-Office flag is set)
- FAXCOM Merge via Client (displayed only if you are configured to access the utility)

Using Advanced Fax Routing

Advanced Fax Routing is a rules-based utility for specifying actions that automatically route incoming faxes, and the menu selection whereby you can access the utility is *not* displayed unless your fax service administrator has configured you to access and use the utility. Moreover, your fax service administrator can control not only whether or not Advanced Fax Routing is available to you, but also just which Advanced Fax Routing actions you can perform, as follows:

> ***Note: While you may not yourself have access to the Advanced Fax Routing utility, your fax service administrator can create system-wide rules whose actions automatically route your received faxes. In addition, the fax service administrator can create rules that are executed before any rules you create, after any rules you create, as well as manage (i.e., edit/delete) any rules you create.***

Basic Rules – whereby you can do all of the following actions:

email to people or distribution list – forward a fax to a valid email address or distribution list (a collection of contact email addresses)

Print fax to the specified printer – send a fax to a printer to which you have been given access

Route fax to people or distribution list – forward a fax to other fax service users and groups of fax service users)

Move a copy to the specified client subfolder – save a fax in a folder created under a pre-existing FAXCOM Client folder

Delete fax -- discontinue any further routing of a fax and remove it

Make this the final rule evaluated – if condition(s) are met for the rule, specify that no further rule evaluation take place

Additional Rule Categories – whereby you can do all of the rules in a specific category, if so configured by your fax service administrator:

OCR Actions – whereby you can do all of the following *in addition to* the Basic rules:

Extract text and create variable -- use Optical Character Recognition to retrieve information from a fax image in order to create a variable (i.e., a placeholder that holds the data assigned to the placeholder)

Extract text listed in text file and create variable -- retrieve a list of text strings trying to find in the image from a text file in order to create a variable (i.e., a placeholder that holds the data assigned to the placeholder)

Reformat – reformat received fax data, including fax properties and user-created variables

Look up in text file table and create variable(s) – retrieve information from a text file in order to continue acting upon a fax

Clear all values in a user-created variable -- remove all data currently assigned to a variable (i.e., a placeholder that holds the data assigned to the placeholder)

Barcode Actions – whereby you can do all of the following *in addition to* the Basic Rules:

Extract barcode and create variable – use Barcode Recognition to retrieve information from a Barcode in order to create a variable (i.e., a placeholder that holds the data assigned to the placeholder)

Reformat – reformat received fax data, including fax properties and user-created variables

Look up in text file table and create variable(s) – retrieve information from a text file in order to continue acting upon a fax

Clear all values in a user-created variable – remove all data currently assigned to a variable (i.e., a placeholder that holds the data assigned to the placeholder)

LDAP Actions – whereby you can do all of the following *in addition to* the Basic Rules:

Look up in LDAP and create variable(s) – retrieve information from an LDAP directory in order to continue acting upon a fax

Reformat – reformat received fax data, including fax properties and user-created variables

Look up in text file table and create variable(s) – retrieve information from a text file in order to continue acting upon a fax

Clear all values in a user-created variable – remove all data currently assigned to a variable (i.e., a placeholder that holds the data assigned to the placeholder

ODBC Actions – whereby you can do all of the following *in addition to* the Basic Rules:

Look up in ODBC and create variable(s) – retrieve information from a database in order to continue acting upon a fax

Write ODBC – write information to a database

Reformat – reformat received fax data, including fax properties and user-created variables

Look up in text file table and create variable(s) – retrieve information from a text file in order to continue acting upon a fax

Clear all values in a user-created variable – remove all data currently assigned to a variable (i.e., a placeholder that holds the data assigned to the placeholder

Fax Splitting Actions – whereby you can do all of the following *in addition to* the Basic Rules:

Split fax into separate documents – create multiple documents from a single fax

Reformat – reformat received fax data, including fax properties and user-created variables

Look up in text file table and create variable(s) – retrieve information from a text file in order to continue acting upon a fax

Clear all values in a user-created variable – remove all data currently assigned to a variable (i.e., a placeholder that holds the data assigned to the placeholder

If you have been configured to use any of the Advanced Fax Routing capabilities, you access the utility by selecting ***Tools…Advanced Fax Routing***. If no such selection has been added to your ***Tools*** menu, you do not have access to the utility.

When you are configured to perform *only* the Basic Advanced Fax Routing rules, you use the more simplified Fax Rules wizard to create the rules, described immediately below.

When you are configured to perform additional Advanced Fax Routing rules (OCR/Barcode/LDAP/ODBC/Fax Splitting) you use the complete Advanced Fax Routing utility. For information on using the Fax Rules wizard/Advanced Fax Routing utility, click the **Help** button displayed on any of its dialogs to access the online help.

Using the Fax Rules Wizard

Do the following to use the Fax Rules wizard to manage basic personal rules:

1. Select *Tools…Advanced Fax Routing* to display the Fax Rules wizard (Figure 9-1).

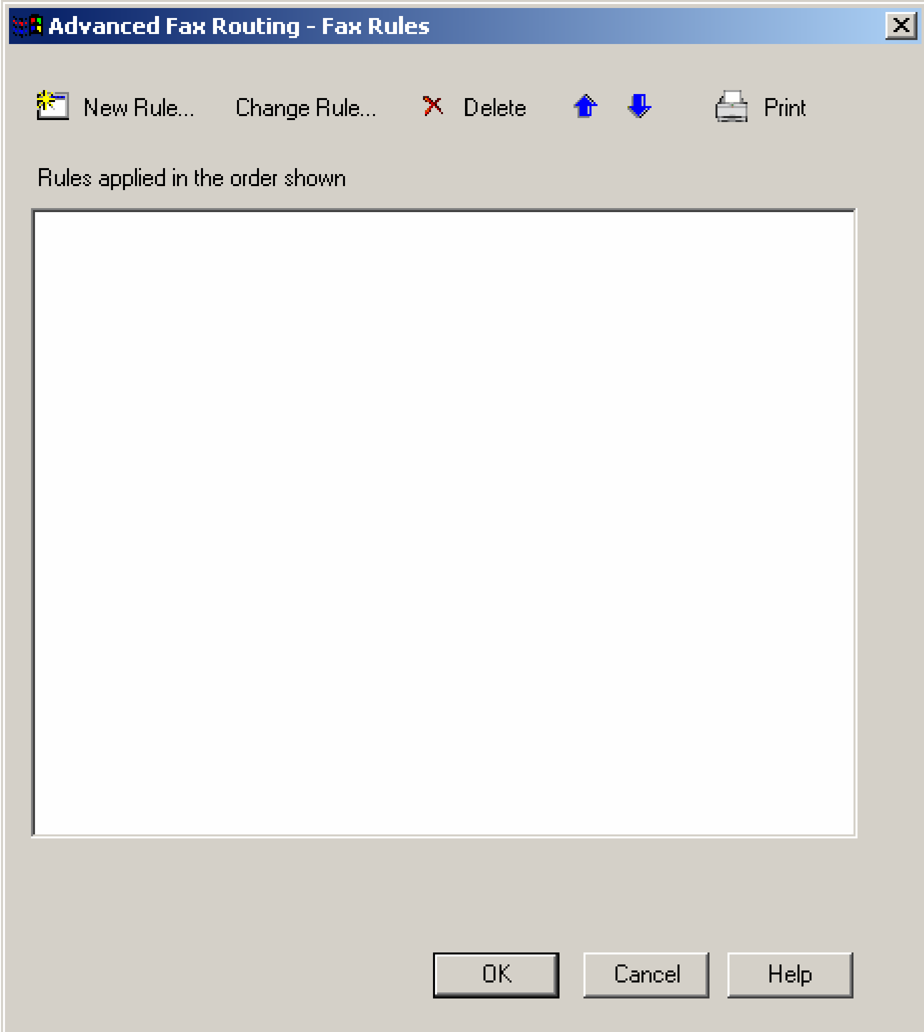


Figure 9-1. Fax Rules Wizard

2. Select 

to create a new rule.

   Select (check) the specific conditions to be met for executing the rule, where selecting no specific conditions indicates that the rule applies to all received faxes. The following specific conditions are available:

   when out of office – select the check box, then click **Next**; select the appropriate action(s) to execute and click **Next** (where all actions are explained in the "Rule

Actions Explained" section below); specify a name for the rule; review the rule description and click **Finish.**

with the number of pages in a specific range – select the check box, then click **Next**; in the Pages Received Criteria dialog (Figure 9-2), specify the appropriate page range value for Pages Received and click **OK.** If appropriate, continue and specify additional conditions for the rule.

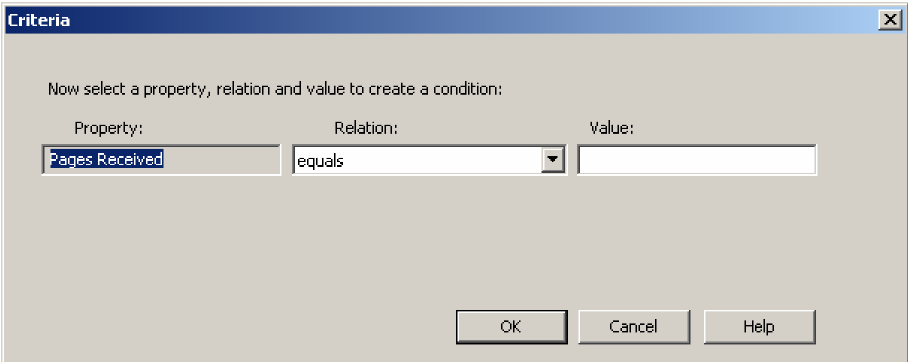


Figure 9-2. Pages Received Criteria Dialog

Once you have specified all relevant conditions, click **Next**; select the appropriate action(s) to execute and, once you have specified all appropriate actions, click **Next** (where all actions are explained in the "Rule Actions Explained" section below); specify a name for the rule; review the rule description – where you can click any line displayed in blue to edit your criteria – and click **Finish.**

received from a specified Transmitting Station ID (TSI) – select the check box, then click **Next**; in the TSI Criteria dialog (Figure 9-3), specify the appropriate TSI value and click **OK.** If appropriate, continue and specify additional conditions for the rule.

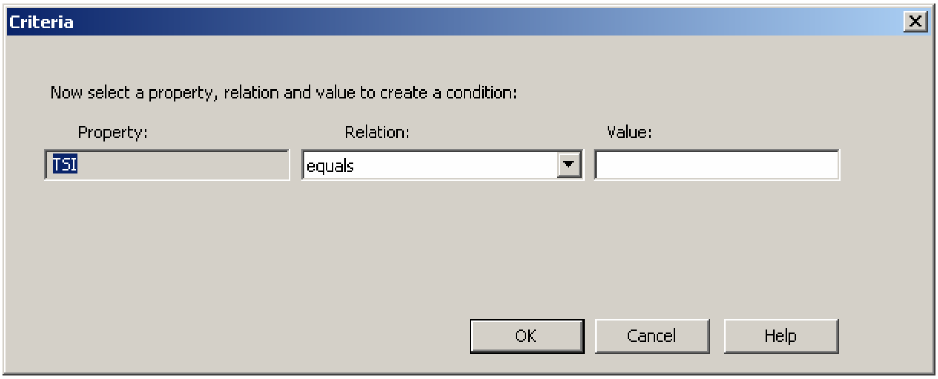


Figure 9-3. TSI Criteria Dialog

Once you have specified all relevant conditions, click **Next**; select the appropriate action(s) to execute and click **Next** (where all actions are explained in the "Rule Actions Explained" section below); specify a name for the rule; review the rule description – where you can click any line displayed in blue to edit your criteria – and click **Finish**.

received with a specific sending telephone number – select the check box, then click **Next**; in the Caller ID Criteria dialog that is displayed (Figure 9-4), specify the appropriate value for the Caller ID and click **OK**. If appropriate, continue and specify additional conditions for the rule.

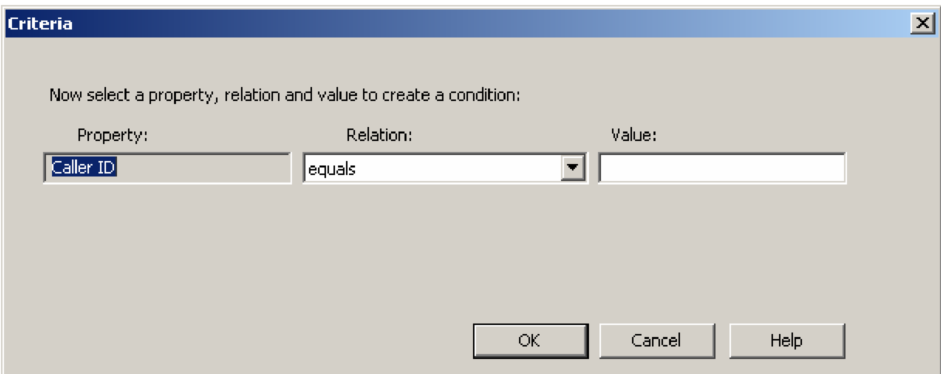


Figure 9-4. Caller ID Criteria Dialog

Once you have specified all relevant conditions, click **Next**; select the appropriate action(s) to execute and click **Next** (where all actions are explained in the "Rule Actions Explained" section below); specify a name for the rule; review the rule description – where you can click any line displayed in blue to edit your criteria – and click **Finish**.

delivered to me during a specific time span – select the check box, then click **Next**; in the Delivered Time Criteria dialog that is displayed (Figure 9-5), specify the appropriate values and click **OK**. If appropriate, continue and specify additional conditions for the rule.

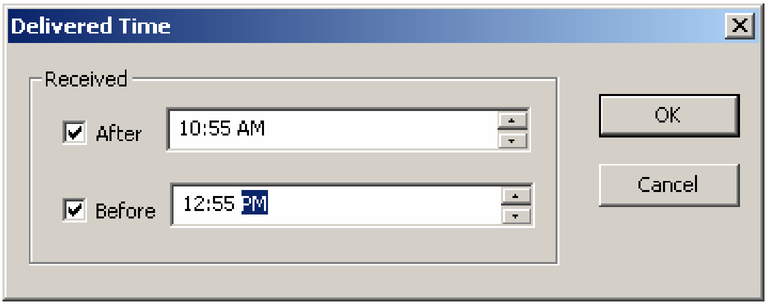


Figure 9-5. Delivered Time Criteria Dialog

Once you have specified all relevant conditions, click **Next**; select the appropriate action(s) to execute and click **Next** (where all actions are explained in the "Rule Actions Explained" section below); specify a name for the rule; review the rule description – where you can click any line displayed in blue to edit your criteria – and click **Finish**.

delivered to me during a specific date span – select the check box (for when the fax was delivered to the FAXCOM Client Inbox), then click **Next**; in the Delivered Date Criteria dialog that is displayed (Figure 9-6), specify the appropriate values and click **OK**. If appropriate, continue and specify additional conditions for the rule.

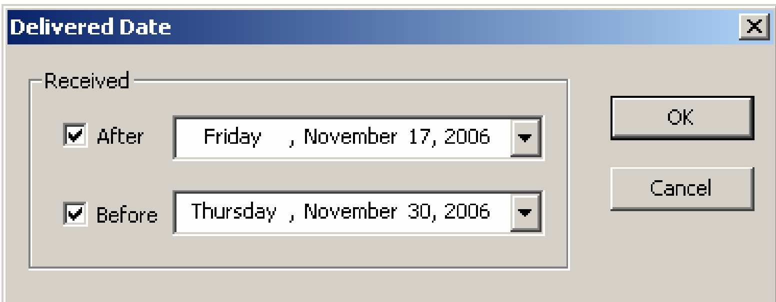


Figure 9-6. Delivered Date Criteria Dialog

Once you have specified all relevant conditions, click **Next**; select the appropriate action(s) to execute and click **Next** (where all actions are explained in the "Rule Actions Explained" section below); specify a name for the rule; review the rule description – where you can click any line displayed in blue to edit your criteria – and click **Finish.**

delivered to me on specific day(s) of the week – select the check box (for when the fax was delivered to the FAXCOM Client Inbox), then click **Next**; in the Day of Week Criteria dialog that is displayed (Figure 9-7), select one or more days of the week and click **OK.** If appropriate, continue and specify additional conditions for the rule.

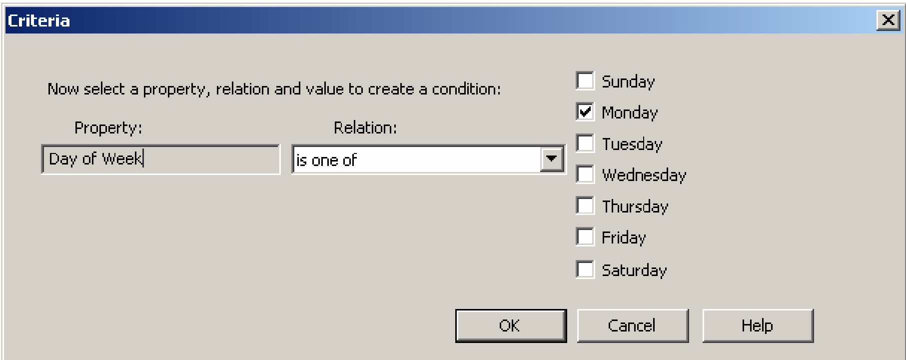


Figure 9-7. Day of Week Criteria Dialog

Once you have specified all relevant conditions, click **Next**; select the appropriate action(s) to execute and click **Next** (where all actions are explained in the "Rule Actions Explained" section below); specify a name for the rule; review the rule description – where you can click any line displayed in blue to edit your criteria – and click **Finish**

received with an error – select the check box, then click **Next**; select the appropriate action(s) to execute and click **Next** (where all actions are explained in the "Rule Actions Explained" section below); specify a name for the rule; review the rule description and click **Finish.**

received without an error – select the check box, then click **Next**; select the appropriate action(s) to execute and click **Next** (where all actions are explained in the "Rule Actions Explained" section below); specify a name for the rule; review the rule description and click **Finish.**

when the fax is received during a specified time range – select the check box (for when the fax was received by the FAXCOM Server), then click **Next**; in the Received Time Criteria dialog that is displayed (Figure 9-8), specify the appropriate values and click **OK**. If appropriate, continue and specify additional conditions for the rule.

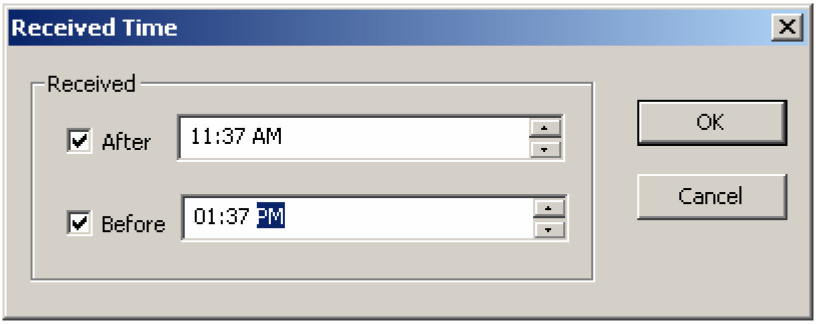


Figure 9-8. Received Time Criteria Dialog

Once you have specified all relevant conditions, click **Next**; select the appropriate action(s) to execute and click **Next** (where all actions are explained in the "Rule Actions Explained" section below); specify a name for the rule; review the rule description – where you can click any line displayed in blue to edit your criteria – and click **Finish**

when the fax is received during a specified date range – select the check box (for when the fax was received by the FAXCOM Server), then click **Next**; in the Received Date Criteria dialog (Figure 9-9) that is displayed, specify the appropriate values and click **OK**. If appropriate, continue and specify additional conditions for the rule.

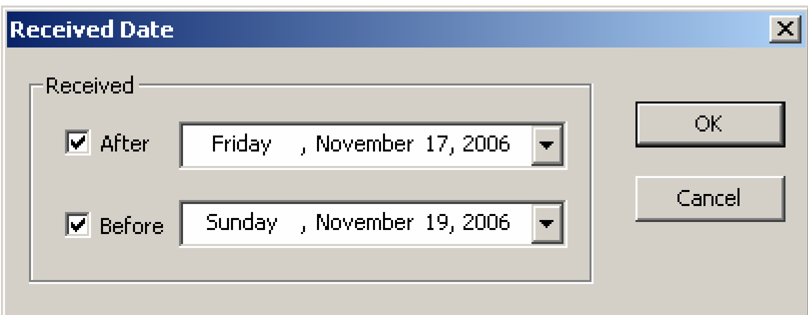


Figure 9-9. Received Date Criteria Dialog

Once you have specified all relevant conditions, click **Next**; select the appropriate action(s) to execute and click **Next** (where all actions are explained in the "Rule Actions Explained" section below); specify a name for the rule; review the rule description – where you can click any line displayed in blue to edit your criteria – and click **Finish**.

Rule Actions Explained

This section explains the actions that can be performed on the fax when the specified conditions are met.

Email to people or distribution list

Once you have selected (checked) the **email to people or distribution list** action, specify the following to configure the action on the Email Action dialog (Figure 9-10).

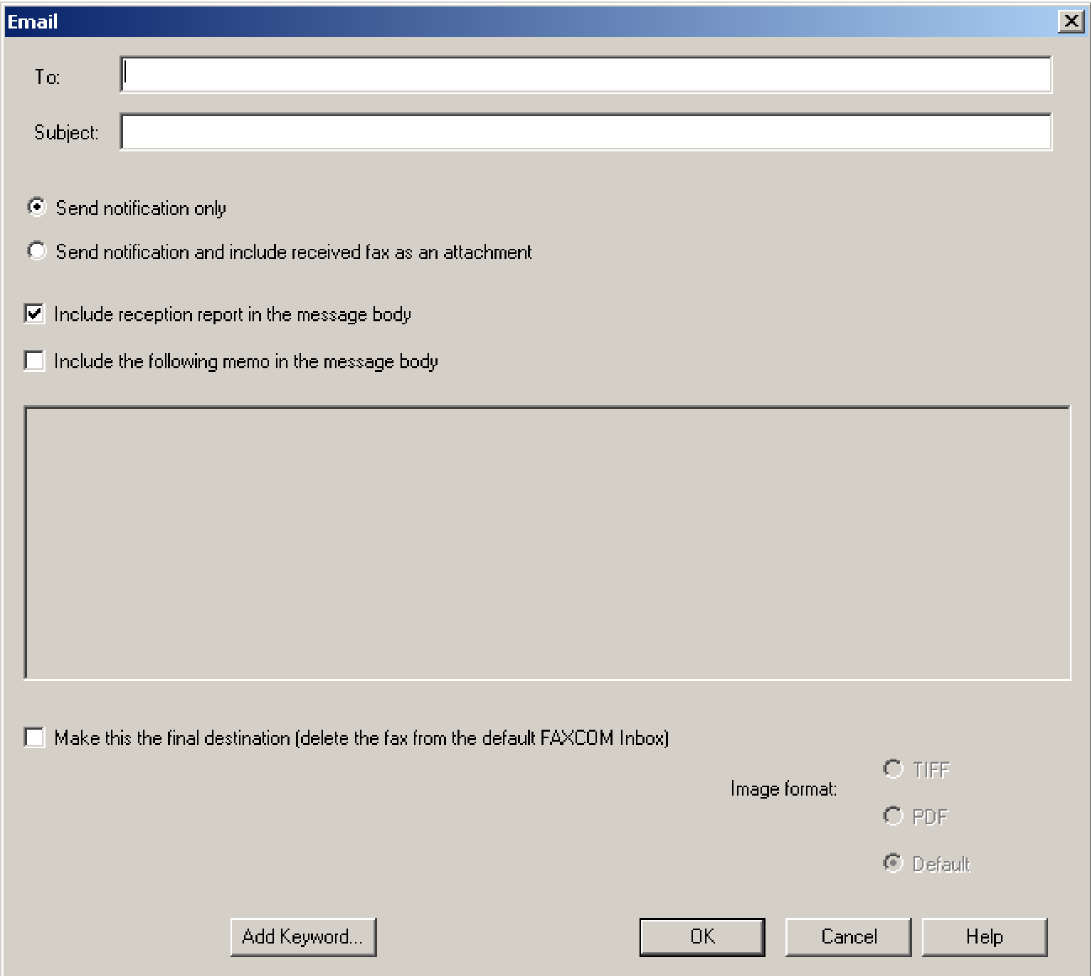


Figure 9-10. EMail Action Dialog

To – specify a valid email address/distribution list.

Subject – specify the *Subject* to be displayed in the email Inbox.

Send notification only – send only an email message notifying the recipient that a fax was received in the default FAXCOM Client Inbox.

Send notification and include received fax as an attachment – send both the email message notification and the actual fax as a message attachment.

Include reception report in the message body – include fax reception details in the body of the email message notification, similar to the following:

```
                  -------Fax Reception Report-------

Received Time:    11/02/2006 10:34
Result:           OK
Description:      All pages received OK
Result Code:      0000
Pages Received:   1
Remote TSI:       Biscom, Inc.
Connect Time:     0 minutes, 0 seconds
Routing ID:       2526
Caller ID:
Unique ID:        BIS-FAXCOM_0611021534302713
Fax Line:         24
Fax Server:       bis-faxcom

The fax is included as a TIF image attachment
```

Include the following memo in the message body – select this option to enable an area in which to enter any text you want displayed as the email message notification.

Make this the final destination (delete the fax from the default FAXCOM inbox) – select this option to specify that once the fax is delivered to the email address, it is deleted and rule processing ends for the fax.

> ***Note: If you are sending*** *only* ***the message notification to the email address/distribution list, and*** *not* ***including the actual fax as an attachment, be careful about also selecting the*** *Make this the final destination (delete the fax from the default FAXCOM Inbox)* ***option.***

Image format – select the format in which to save the received fax, either *TIFF* (to be opened in a TIFF viewer), *PDF* (to be opened in Adobe Acrobat Reader), or *Default* (to use whichever format [*TIFF* or *PDF*] has been specified for this user account.

Add Keyword… – click this button when your cursor is in either the *To* or *Subject* fields to select keyword/variable items with which to populate the field. Once you click the button, select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a keyword/variable item that will be replaced with the actual instance of the item.

print fax to the specified printer

Once you have selected (checked) the print fax to the specified printer action, specify the following to configure the action on the Print Action dialog (Figure 9-11), clicking **OK** when done:

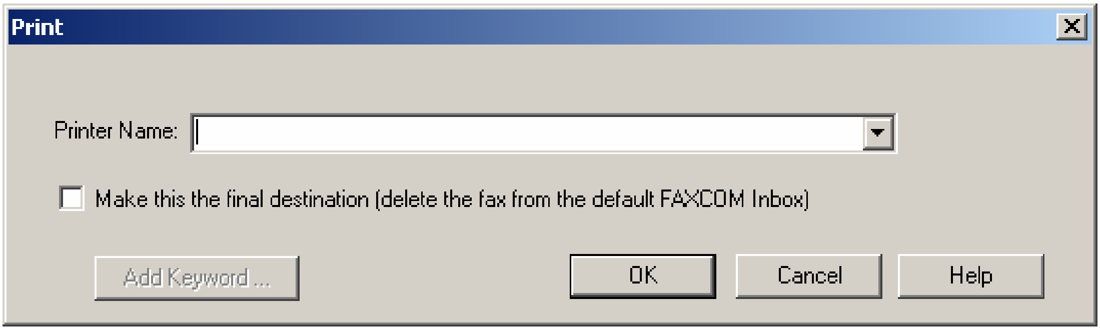


Figure 9-11. Print Action Dialog

Printer Name – select from the network printers available to you.

Make this the final destination (delete the fax from the default FAXCOM Inbox) – select this option to specify that once the fax is delivered to the selected printer, it is deleted and rule processing ends for the fax.

route fax to people or distribution list

Once you have selected the **route to people or distribution list** action, specify the following information for automatically routing a received fax to another fax service user on the Route to Other Users dialog (Figure 9-12), clicking **OK** when done:

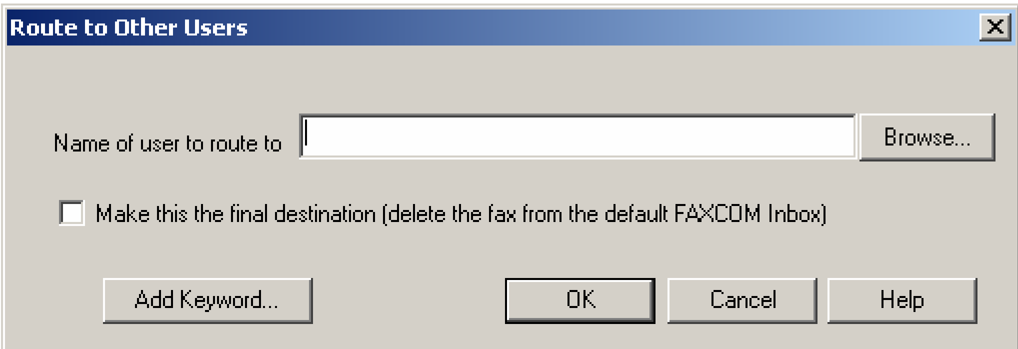


Figure 9-12. Route to Other Users Dialog

Name of user to route to – type the name of any user(s), either as the entire name, or as part of a string that includes Keywords you select by clicking the **Add Keyword...** button (or click the **Browse** button to select a user). Note that you can right-click in the *Name of user to route to* field to display a shortcut menu with the following choices: **Undo, Cut, Copy, Paste, Delete, Select All,** enabling you to manipulate the items in the string as appropriate.

Make this the final destination (delete the fax from the default FAXCOM Inbox) – select this option to specify that once the fax is routed to the specified user, it is deleted and rule processing ends for the fax.

Add Keyword... – with your cursor in the *Name of user to route to* field, click this button to select Keyword/Variable items with which to populate the field.

Select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a Keyword/Variable item that will be replaced with the actual instance of the item.

move a copy to the specified client subfolder

Once you have selected (checked) the **move a copy to the specified client subfolder** action, specify the following information for configuring the action on the Save in Subfolder Action dialog (Figure 9-13), clicking **OK** when done:

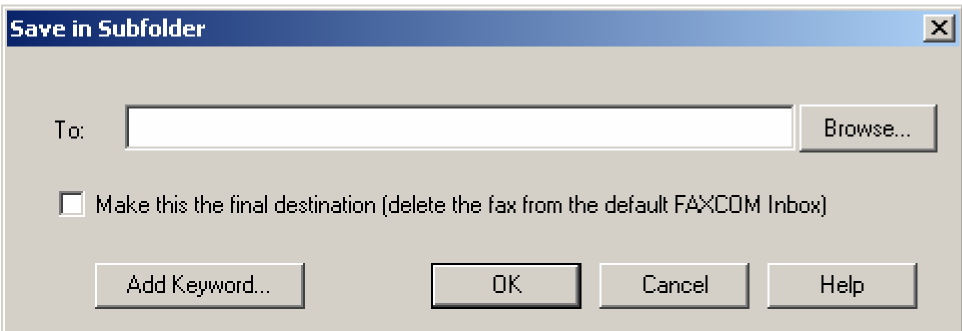


Figure 9-13. Save in Subfolder Action Dialog

To – type any text to be the name of the FAXCOM Client subfolder directly into the *To* field, or click the Browse button to select a preexisting FAXCOM Client folder. Note that when your cursor is in this field, the **Add Keyword...** button is active, enabling you to select fax information properties and variables, either as the entire name or in addition to the name you specify in the *To* field.

In addition, you can right-click in the *To* field to display a shortcut menu with the following choices: **Undo**, **Cut**, **Copy**, **Paste**, **Delete**, **Select All**, enabling you to manipulate the items in the string as appropriate

Make this the final destination (delete the fax from the default FAXCOM Inbox) – select this option to specify that once the fax is routed to the specified subfolder, it is deleted and rule processing ends for the fax

Add Keyword… – when your cursor is in the *To* field, the **Add Keyword...** button is enabled.

A keyword represents an item of fax information data, i.e., fax properties and values of user-created variables. For example, the Keyword for the *Time Received* property is *%miTime%*.

After clicking the **Add Keyword...** button, select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a Property/Variable item that will be replaced with the actual instance of the item. For e.g., select *Current Date* to name the subfolder with the current date, i.e., December 2, 2005. The selected item is displayed in the *To* field. If appropriate, continue to click the **Add Keyword**… button and select additional items to be concatenated (linked together as one string) to the previously selected item(s). As an example, the following string is displayed in the *To* field by clicking the **Keyword**… button and selecting *Current Date*, then typing the string *Sales Order* directly into the To box, clicking the **Add Keyword**… button again and selecting *Current Time*, clicking the **Add Keyword**… button again and selecting *Faxcom* (for the name of the FAXCOM Server on which the document was received), and finally clicking the **Add Keyword**… button again and selecting *Pages Received*:

%siCurrDate%Sales Order%siCurrTime%%miwFaxcom%%miwPgs%

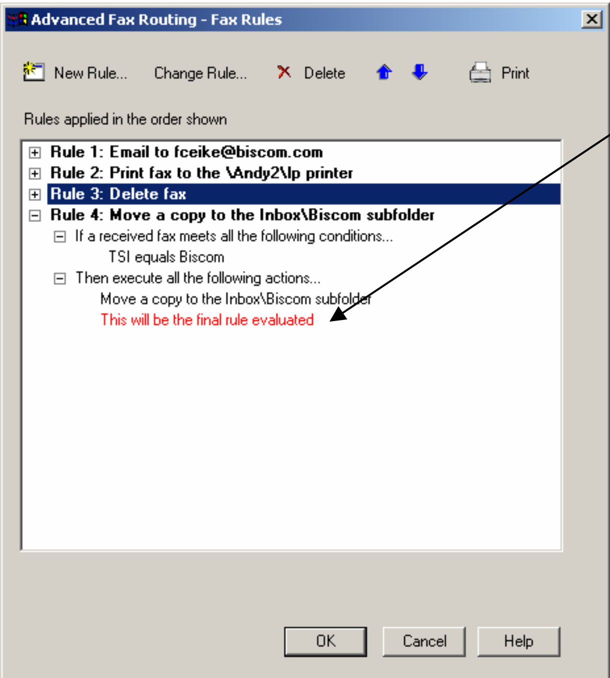
delete fax

Once you have selected the **delete fax** action, continue the process of creating the rule whereby received faxes that meet the specified conditions are automatically deleted.

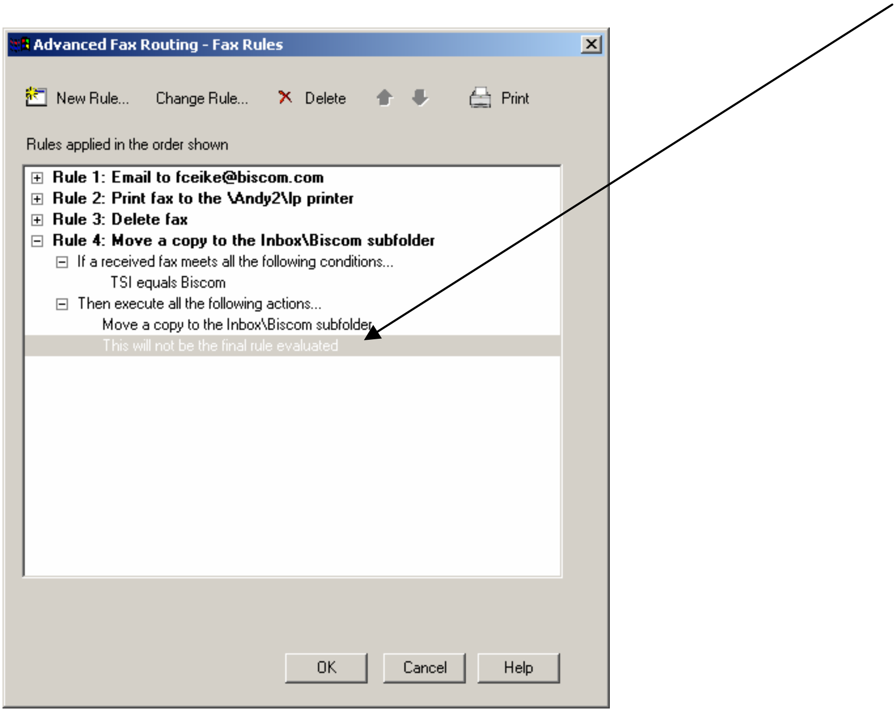
make this the final rule evaluated

Once you have selected the **make this the final rule evaluated** action, be aware that you can always do the following to toggle between the states whereby a rule is/isn't the final rule evaluated:

1. In your rule list, locate a red line that says This will be the final rule evaluated, as shown below.



2. Select the "This will be the final rule evaluated" line and click **Delete**. The line automatically changes to "This will not be the final rule evaluated," as shown below.

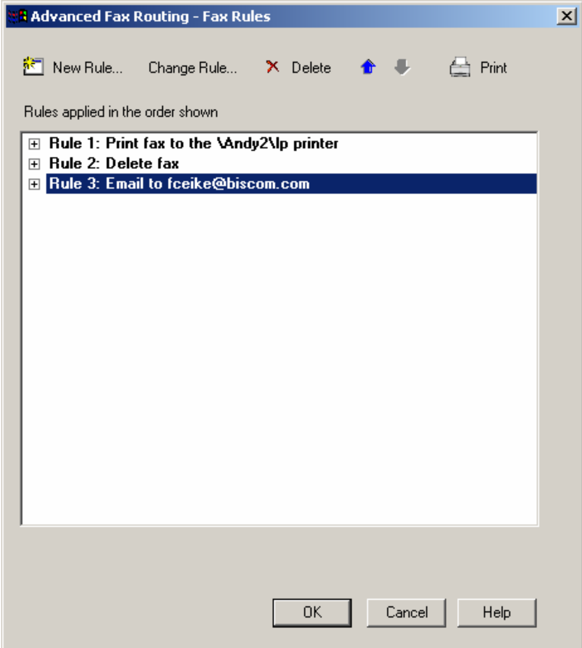


3. To toggle back to the "This will be the final rule evaluated" state, select the "This will not be the final rule evaluated" line and click **Delete.**

Changing Rules/Rule Order, Deleting, and Printing Rules

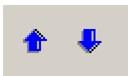
Once you have created rules, do the following to change a specific rule, change the order in which rules are processed, delete rules, and print the list of rules:

1. Select *Tools…Advanced Fax Routing* to display the Fax Rules wizard.



2. *To change a rule*, select the rule and click 

.

   To change the order of rules, where rules are executed from top to bottom, select the rule and click  as appropriate.

   To delete a rule, select the rule and click 

.

   To print the list of rules, click 

.

Setting an Out-of-Office Flag

With the Advanced Fax Routing utility, either you (if you have access to the utility), or your fax service administrator, can create a rule to automatically route incoming faxes when you are out of the office.

In the event there is such a rule to be executed, do the following to set the Out-of-Office flag:

- Select *Tools...Out of Office*. A checkmark is displayed to the left of the menu selection to indicate the flag is turned on. To specify you have returned to the office, select *Tools...Out of Office* when the checkmark is displayed to turn off the flag.

Installing and Using the Mail Merge Utility

The Mail Merge for Word utility enables you to merge and fax customized documents prepared from a main document and a data source. Do the following to install and use the utility:

Installing the Mail Merge Utility

To install the Mail Merge utility you simply click the Mail Merge for Word installation document, to cause a document template to be automatically copied to the appropriate template directory.

1. Double-click the `FAXCOM_Client_Mail_Merge.doc` item made available to you by your fax service administrator. The following Security Warning is displayed (Figure 9-14):

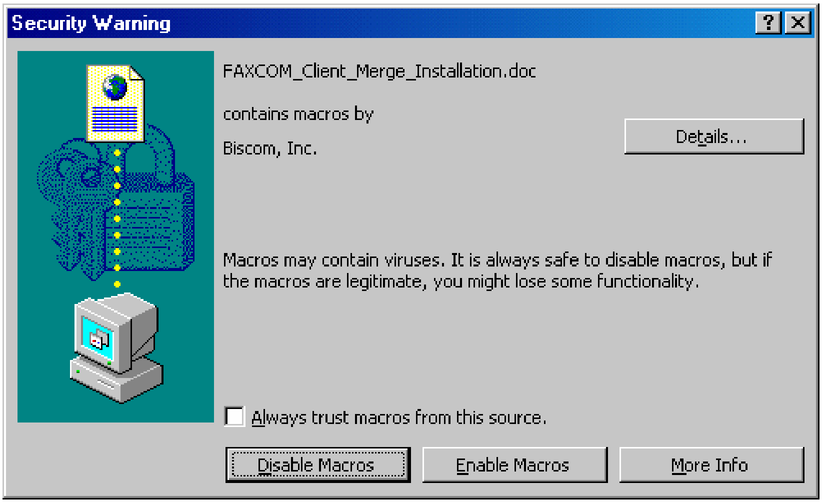


Figure 9-14. Security Warning

Click the **Enable Macros** button to continue and open the document, which is shown in Figure 9-15.

Note: XP users must check the *Always trust macros from this source* **_check box in order to activate the_** *Enable Macros* **_button._**

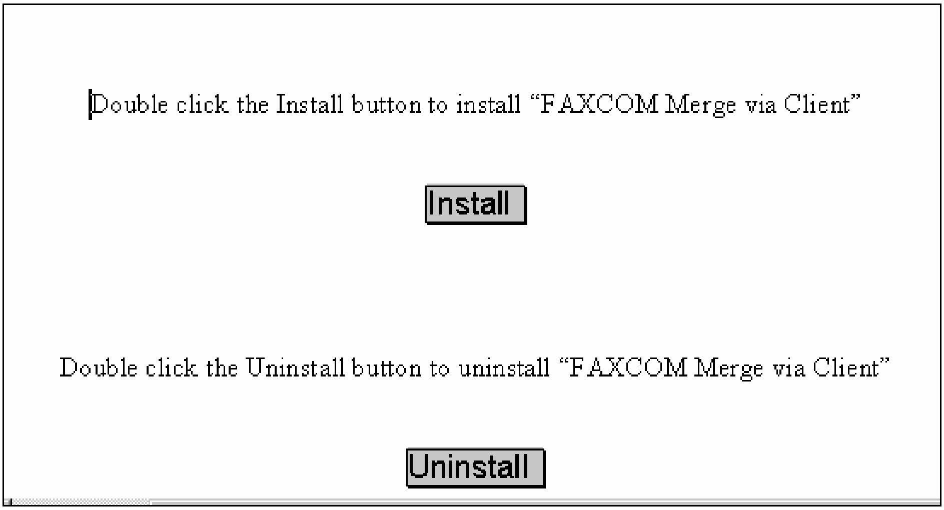


Figure 9-15. FAXCOM_Client_Mail_Merge.doc

Double-click the **Install** button to automatically copy the template to the appropriate template directory and display the following successful installation confirmation

.

In addition, the ***FAXCOM Merge via Client*** selection is added to the ***Tools*** menu within MS Word.

Note: To uninstall the utility, follow the steps immediately above, with the one exception being you click the *Uninstall* **_button._**

Using the Mail Merge for Word Utility

Do the following to merge and fax your documents:

1. Make sure that you have logged in at least once to the FAXCOM Client application.

2. Create your data source. Make sure that you include **Fax Number** as one of the data items. (This is the only data item required by the FAXCOM Mail Merge utility in order to fax the customized merged document.)

3. Within MS Word, create your main document with the appropriate **Merge Fields.**

4. Within the main document, select *Tools…FAXCOM Merge via Client* to display the FAXCOM FaxMerge Mappings dialog (Figure 9-16).

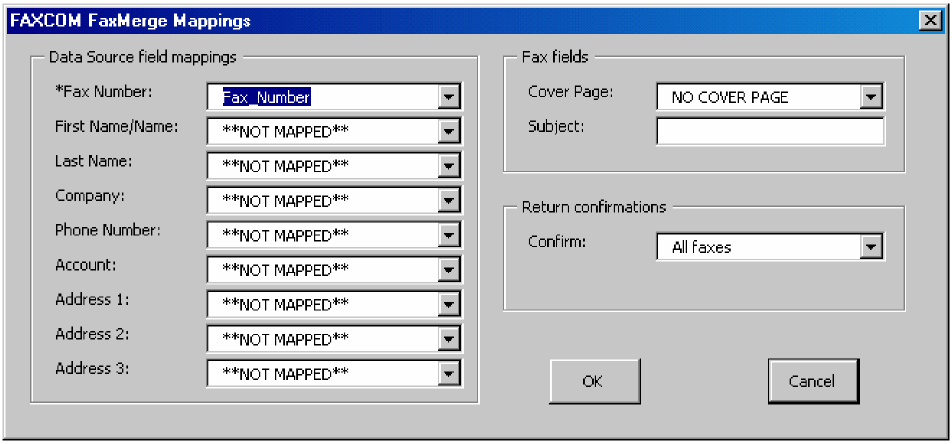


Figure 9-16. FAXCOM FaxMerge Mappings Dialog

5. In the *Fax Number* box (marked with an asterisk as the only field required for faxing), select the **Fax_Number** data item from the drop-down list of Merge Fields, as shown in Figure 9-17.

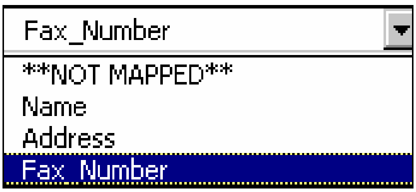


Figure 9-17. Fax Number Mapping

6. To include a cover page, in the Cover Page box, change the default of NO COVER PAGE to DEFAULT COVER PAGE or select a specific named cover page. You can then specify a Subject to be displayed on the cover page.

   To select the fields to be displayed on the cover page, in the Data Source field mappings area, change the default of NOT MAPPED to the appropriate field. For example, to print the recipient's name on the cover page, in the *First Name/Name* box change the value of NOT MAPPED to **Name**, as shown in Figure 9-18.

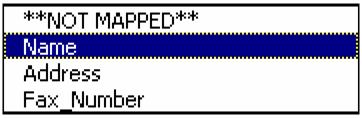


Figure 9-18. Name Mapping

7. To specify the circumstances by which you receive a return status for the fax transmission, in the Return Confirmations Return box, select either *All faxes* or *Failed faxes only*.

8. Click **OK** to send the fax.

   A prompt such as that displayed in Figure 9-19 is displayed.

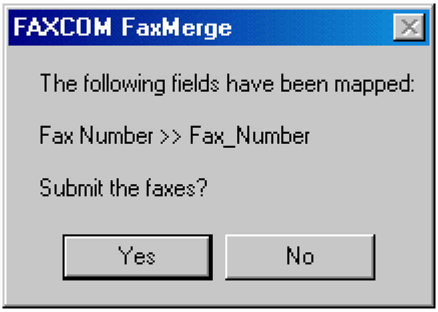


Figure 9-19. FAXCOM FaxMerge Prompt

9. Click **Yes** to submit the faxes. Depending on what you selected for Return Confirmations, you will receive a confirmation for all faxes sent or failed faxes only.