

# XMediusFAX™

BOARDLESS, T.38 FAX OVER IP SERVER



Global leader in advanced fax server solutions that leverage  
IP telephony, UC & ECM systems

User Guide

SAGEMCOM



## **XMediusFAX**

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# Chapter 1


# Introduction

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## ***Purpose of this document***

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This manual is written for anyone using XMediusFAX to send, receive or manage faxes.

 **Note:** It does not cover XMediusFAX server and client installation (see the *Installation and Maintenance Guide*), and server configuration and management (see the *Administration Guide*).

## ***Windows Tools***

---

XMediusFAX offers several tools that can be installed and used on the Microsoft Windows environment.

### **SendFAX**


SendFAX is a fax interface that offers users all the functions involved in the sending of a fax (see chapter: [Overview](#) on page 3).

### **Phone Book**

The Phone Book allows you to manage your contacts for easy selection in SendFAX. Any number of phone books can be created (see chapter: [Overview](#) on page 23).

### **Viewer**

The Viewer allows users to display and read faxes. It is actually a TIFF files viewer that offers some additional editing features (see chapter: [Overview](#) on page 35).

 **Note:** If you do not have the Viewer installed on your computer, you can use the Windows Imaging Preview to view your faxes.

### **Fax Utilities for General Applications**

XMediusFAX provides several utilities that allow you to send faxes directly from your general applications. These can be printer drivers – used from any application by the print feature – or integrated fax features – only for MS Word and OpenOffice.org Writer – (see chapter: [Overview](#) on page 41).

### **Fax Utilities for Email Clients**

XMediusFAX allows you to send and receive faxes with your email software. Also, if you are using Microsoft Outlook – connected to an Exchange server –, or Lotus Notes (depending on your license, some additional

tools are available to facilitate the management of your faxes (see chapter: [Faxing with Email Clients: Overview](#) on page 51).

### **Cover Sheet Editor**

Cover Sheet Editor allows to create fax cover sheets or modify the provided ones. A cover sheet can contain variables that are resolved at send time – sender name, company name, address, telephone and fax numbers, etc. – (see chapter: [Overview](#) on page 75).


### **Fax Account Monitoring Spot**

The Monitoring Spot is a dynamic notification icon located in the Windows taskbar that allows you to monitor your own fax account activity (pending/sent/received faxes, fax failures, account connection status...). This is also a quick access point to your Fax Box (Web Access).

## **Web Tools**

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XMediusFAX offers several tools that can be accessed by using a Web browser. All of them are available through the same Web interface. For more information, please refer to the concerned chapter ([Overview](#) on page 89).

 **Note:** The XMediusFAX Web client interface is optimized for use with assistive technologies, which are used by individuals that are visually impaired or have reduced mobility.

### **Fax Browser**

The Web interface provides a means to view the status of your faxes in the Inbound History, Outbound History and Outgoing Queue.

### **Web Compose**

The Web Compose is the part of the Web interface where you can create and send faxes.

### **Web Phone Books**

The Web Phone Books allow you to manage your personal contacts (and possibly view public contacts) that can be used to send faxes.

## Chapter 2

## Faxing with SendFax

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### Overview

---

SendFAX is the fax interface for users with advanced faxing needs. If Outlook has been configured on your local machine, SendFAX can be integrated with Outlook.



This chapter includes information about configuring SendFAX and using it to send faxes with various options.

### Launching SendFAX

---

Among your installed **XMediusFAX** applications, choose **SendFAX**.

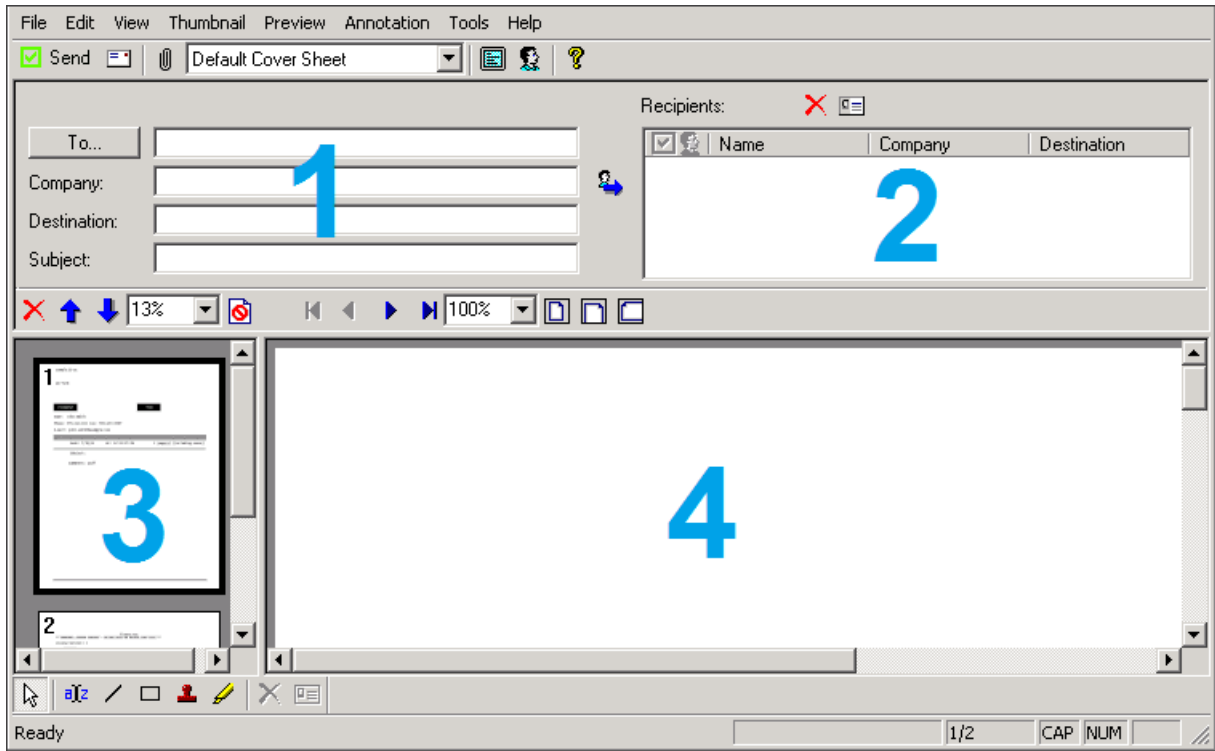
The SendFAX interface will appear.

 **Note:** **SendFAX** can also be accessed through any Windows applications with a printing function (see [Faxing from Windows Applications by Using SendFAX](#) on page 41) or from Microsoft Outlook by clicking the  button (if the Outlook add-in is installed on your PC).

### Interface Description

---

Menus and toolbars aside, after initial installation the default SendFAX interface is divided into four main areas:



1. The **Manual Addressing Fields** section – **To**, **Company**, **Destination**, and **Subject** – allow you to type recipient information directly. Usually, **To** receives the recipient's name. **Destination**, which is the only mandatory field of the four, receives the fax number or the email address.
2. The **Recipients** section displays the individuals and groups to receive the transmission, either selected from a phone book or typed directly into the manual addressing fields.
3. The **Thumbnail View** section displays successively a reduced image of each page of the fax. A scrollbar enables you to view any page; selecting a page in the Thumbnail View displays that page in the Fax Preview. The Thumbnail View also makes it possible to reorder and delete pages from the fax.
4. The **Fax Preview** section displays a single page of the fax at a time. It is here that you add annotations to a fax before sending it. For more details on annotations, see the corresponding chapter ([Overview](#) on page 39).

Also, SendFAX provides the means:

- to select a cover sheet among the ones available on the fax server,
- to display a contact list of potential recipients from one of several phone books available to you,
- to alter transmissions settings, modify your sender and recipient information,
- to change the interface to suit your requirements,
- to send faxes to fax numbers as well as to email addresses.



## ***Menu Bar Details and Associated Icons***

Description of all the items of the SendFAX menu bar.



### **The File Menu**

<b>New</b>	cancels the current fax, clearing the fax recipient list and begins a new one.
------------	--




	<b>Insert</b>	lets you insert a file into your fax.
	<b>Save As</b>	lets you save your fax in a local or network directory.
	<b>Print</b>	prints the fax and any cover sheet.
	<b>Send</b>	sends the fax and closes the SendFAX interface.
	<b>Send without Closing</b>	sends the fax but keeps the SendFAX interface open, for example, to allow you to send the same fax to other recipients.
	<b>Connection Settings</b>	allows you to change the Fax Server Host Name and other parameters. For more details refer to <a href="#">Connection Settings</a> on page 8.
	<b>User Settings</b>	allows the user to change his User Name and Password. For more details, refer to <a href="#">Connection Settings</a> on page 8. This option is only available in native mode (when sending through an XML gateway),
	<b>Email Settings</b>	allows the user to set up the SMTP settings and email content (used by the email feature of SendFAX). For more details refer to <a href="#">Email Settings</a> on page 10.
	<b>Exit</b>	closes SendFAX.






### The Edit Menu

	<b>Faxing Properties</b>	displays a tabbed window in which you enter sender information or organization information and specify fax settings. For additional details refer to <a href="#">Editing sender or company information</a> on page 17 and <a href="#">Changing fax transmission settings</a> on page 18.
	<b>Fax Recipient</b>	allows you to modify the information about a selected fax recipient in the fax recipient list.
	<b>Cover Sheet Comments</b>	enters a comment in the cover sheet.
	<b>Printer Properties</b>	lets you configure the XMediusFAX printer.









### The View Menu

	<b>Toolbar</b>	displays the SendFAX toolbars. When a toolbar is visible, a check mark appears beside its name. The four toolbars; Main, Preview, Thumbnail, and Annotation; are displayed by default.
	<b>Status Bar</b>	displays or hides the Status Bar. A check mark appears beside it when it is visible.
	<b>Phone Book</b>	displays a phone book on the right or left of the interface.
	<b>Full Preview</b>	displays only the thumbnails and fax preview. The display of the manual addressing fields, the fax recipient list, and the contact information is suspended. Deselecting <b>Full Preview</b> re-displays that information in the SendFAX window.
	<b>Options</b>	displays a window that allows to: <ul style="list-style-type: none"> <li>• select the phone books you wish to make available from SendFAX (XMediusFAX phone book and/or MAPI phone book, with MAPI configuration tab).</li> <li>• choose the default SendFAX interface to be launched via the <b>XMediusFAX</b> virtual printer (for more details, see <a href="#">SendFAX Interface Display Options</a> on page 11)</li> </ul>
	<b>Languages</b>	sets the language used in client applications for the current user (MMC Snap-in, SendFAX, TIFF Viewer, Phone Book, and Cover Sheet Editor). Changes occur after restarting SendFAX.

### The Thumbnail Menu


	<b>Delete</b>	removes pages selected in the thumbnail view from your fax.
	<b>Move &gt; First</b>	moves the selected page to the first page after a cover sheet.
	<b>Move &gt; Up</b>	moves the selected page up one page
	<b>Move &gt; Down</b>	moves the selected page down one page
	<b>Move &gt; Last</b>	moves the selected page to the last page of the fax
	<b>Mark As &gt; Do not Send</b>	instructs SendFAX to exclude the page selected in the thumbnail view when you transmit the fax.
	<b>Mark As &gt; Send</b>	restores an excluded page.
	<b>Zoom</b>	increases or decreases the magnification of pages in the thumbnail view.

### The Preview Menu

	<b>First Page</b>	lets you view the first page of your fax.
	<b>Previous Page</b>	lets you view the previous page of your fax.
	<b>Next Page</b>	lets you view the next page of your fax.
	<b>Last Page</b>	lets you view the last page of your fax.
	<b>Best Fit</b>	displays the page at the magnification that best fits the preview window.
	<b>Fit to Width</b>	displays the page at the maximum width that fits in the preview window.
	<b>Fit to Height</b>	displays the page at the maximum height that fits in the preview window.
	<b>Zoom</b>	lets you choose one of the preset magnification values.

### The Annotations Menu


Annotations are objects you can add to draw attention to certain parts of a fax. For more information about annotations, refer to the corresponding chapter ([Overview](#) on page 39).

 **Note:** The Annotations feature cannot be used on cover sheets when composing a fax in SendFAX.

### The Tools Menu

<b>Phone Book</b>	launches the phone book window through which you can create a new phone book, update contacts in an existing one, and select a phone book and contact list for sending faxes. Refer to <a href="#">Contacts Overview</a> on page 23 for detailed information.
-------------------	---

### The Help Menu

	<b>Help Topics</b>	opens the online help, where you can get more information about using XMediusFAX.
	<b>About SendFAX</b>	displays version and copyright information about SendFAX.

## ***Result of Fax Sending Depending on Destination Type***

---

SendFAX allows you to send a fax to a destination that is either a fax number or an email address. When the destination is a fax number, the behavior is like any other fax. When the destination is an email address, the fax (with the cover sheet, if applicable) is sent as an attachment with the email. Email settings, including the attachment format, can be configured here: [Email Settings](#) on page 10.

Depending on how SendFAX is configured to send faxes, you will have different behaviors for destinations and sent fax records. For more information on configurations, see [Settings](#) on page 8.

### **SendFAX Configured to Fax via the Server's XML Gateway**

In that configuration, regular faxes are directly sent to the fax server (via XML Gateway) and emails are sent via a separate mail server.

When the destination is a fax number, the record of the sent fax will appear in the **Outbound History** folder of the Web Client.

When the destination is an email address, the record of the sent fax will appear in a **.log** file in the following directory:

- For Windows 2003 and Windows XP: C:\Documents and Settings\*<user\_name>*\Application Data\Fax\SendFAX\Trace\SendFaxEmail.log
- For Windows Vista and later Windows versions:  
C:\Users\*<user\_name>*\AppData\Roaming\Fax\SendFAX\Trace\SendFaxEmail.log

You can open this log with any text editing software.

### **SendFAX Configured to Fax via Outlook**

In that configuration, faxes and emails are sent via Outlook to the appropriate server (fax/email).

When the destination is a fax number, the record of the sent fax appears in the **Sent Items** folder of Outlook as well as in the **Outbound History** folder of the Web Client.

When the destination is an email address, the record of the sent fax appears only in the **Sent Items** folder of Outlook.

### **Email Behavior With or Without a Cover Sheet**

When a fax is sent to multiple fax numbers, a record is always kept for each fax destination whether there is a cover sheet or not. The behavior when sending to email addresses is different.

When a fax is sent to multiple email addresses without a cover sheet, SendFAX creates only one email and sends it to all recipients. The **To:** field of the email received by the recipients will contain the names of all the recipients.

On the other hand, if the fax is sent with a cover sheet, SendFAX creates an email for each recipient and the **To:** field will contain only the email of the recipient.

When sending to multiple email addresses while SendFax is not configured to fax via Outlook, a record for each recipient is always created in the **.log** file, whether there is a cover sheet or not. In Outlook, a record is kept only for each email that is sent.

## Settings

---

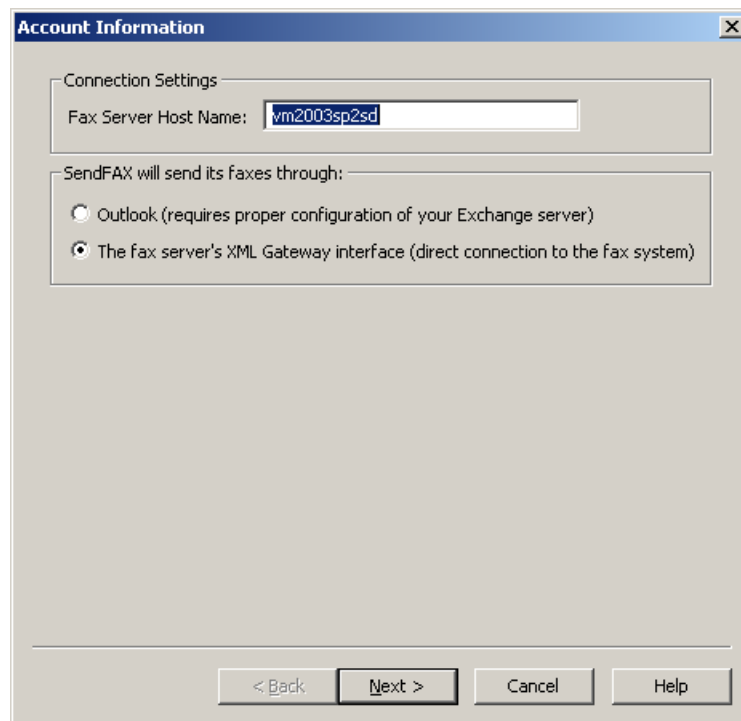
In this section you will find the various settings that can be configured in SendFAX. Normally, these settings are configured by the system administrator and the user should not have to configure or modify them.

### Connection Settings

---

If you need to modify your connection settings that were configured during initial installation, proceed as follows:

1. From the SendFAX menubar, click **File > Connection Settings**.  
The **Account Information** dialog box appears.



2. In the **Connection Settings** section, specify the **Fax Server Host Name**.

**Attention:** This value should have been correctly set (or communicated) by your administrator while installing SendFAX; you should not have to change it.

Acceptable syntax: `[{http|https}://]<ServerName_or_IP>[:<Port>]`


In HTTPS context, `<ServerName_or_IP>` must be the Common Name of the Fax Server (and not its IP address).

3. In the **SendFAX will send its faxes through** section, select the radio button that corresponds to your desired settings:
  - Select **Outlook** if you want to use the SendFAX integration with Outlook. Outlook must already be configured on the local computer and the administrator must have correctly configured the Microsoft Exchange server of your organization.

- Note:** The sending of emails is automatically covered by Outlook, no additional configuration is required.
  - Select **The fax server's XML Gateway interface** in order to use SendFAX in native mode.
  - Note:** To be able to send faxes to email addresses, the SMTP settings must be configured (see [Email Settings](#) on page 10).
4. Click the **Next** button, enabled in native mode when sending through the XML gateway; otherwise, from the SendFAX menubar, click **File ► User Settings....**  
The **User Settings** dialog box will appear, as depicted in the following screenview.


5. In the **Authentication** section, select the radio button that corresponds to your desired settings:
- Select **Use Windows Integrated Single Sign-On** to log in automatically with your regular NT identity.
    - Note:** The check box, **Get sender information from the active directory on startup**, fills the sender information with active directory information if the user selected the **Use Custom Sender & Company Information** option in the advanced transmission settings. For additional details on the latter, refer to the section, [Editing sender or company information](#) on page 17, found further on in this chapter.
  - Select **Use Basic Authentication**, and enter your user login in the **User Name** field and password in the **Password** field. If you want these values to be used every time you log on, check the **Remember password** box.
6. In the **Email confirmations should be sent to** section, select one of the options for the e-mail address to which the feedback notifications are to be sent:

Option	Description
<b>Do not send email confirmations</b>	You will not receive any confirmation by email.

Option	Description
<b>Use the email address associated with my account</b>	You will receive confirmations through the email address associated to the account defined at the previous step.   <b>Note:</b> This option is selected by default.
<b>Use this email address</b>	You will receive confirmations through the email address entered manually in the field beside.

7. Click **Finish**.

Subsequent SendFAX sessions will use the same settings. If the **Remember password** box wasn't checked, a password dialog will prompt you when sending a fax if required.

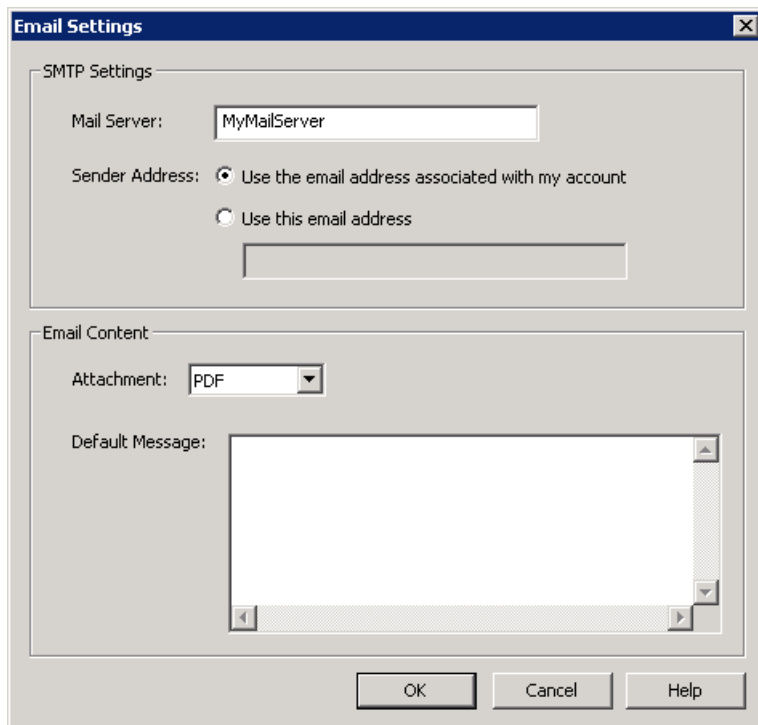
 **Note:** If there is a problem with the system when you try to log into SendFAX and an error message appears, consult your system administrator to make sure you have the proper authorization, or to ascertain when the system will be back and running.

If at any time you wish to change the gateway or modify the connection properties, perform the set-up procedure once again as detailed above.

## Email Settings

---

To access the Email Settings dialog box, click **File > Email Settings...** in the SendFAX menubar.



### SMTP Settings


If you intend to send faxes to email addresses (in addition to fax numbers), you will need to configure the email settings. If you are configured to send your faxes through Outlook (see [Connection Settings](#) on page

8), the SMTP settings are already configured and cannot be modified in this dialog (the **SMTP Settings** box is grayed out).

If you do not use Outlook and want to send faxes to email addresses through a mail server, configure the SMTP settings.



**Attention:** When sending faxes to email addresses (as opposed to fax numbers), the records for sent faxes are not logged in the Web Client folders. See [Result of Fax Sending Depending on Destination Type](#) on page 7 for more information.

<b>Mail Server</b>	Specify the <b>Mail Server</b> . The administrator must have already correctly configured the mail (SMTP) server of your organization.   <b>Note:</b> Acceptable syntax: <MailServerName_or_IP>[:<Port>]  By default, the port number is 25. You need to enter a port number only if you use a different port.
<b>Sender Address</b>	Select <b>Use the email address associated with my account</b> if you want SendFAX to use your normal email as your return address. If you want a reply to a different email address, select <b>Use this email address</b> , and supply a valid email address in the input field.

## Email Content

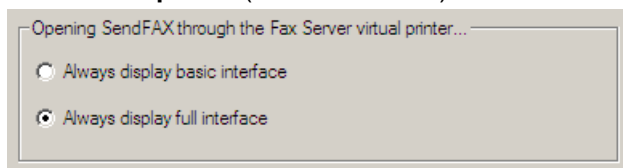
In this box you can select the format of the email attachment and write a default message.

<b>Attachment</b>	When sending a fax to an email address, the fax is in the form of an attachment. You can select PDF or TIFF as the format. The default is PDF.
<b>Default Message</b>	Type in your default message. The message will be shown in the body of the email only when there is no text in the cover sheet <b>Comments</b> field or when there is no cover sheet.

## SendFAX Interface Display Options


SendFAX can be used for composing faxes from scratch, as described in this chapter, but it can also be launched from any Windows application by printing on a dedicated virtual printer named **XMediusFAX** (see [Overview](#) on page 41).

When launched via such a print, SendFAX will be displayed by default with the interface type that is selected in **View ► Options** (SendFAX menu).



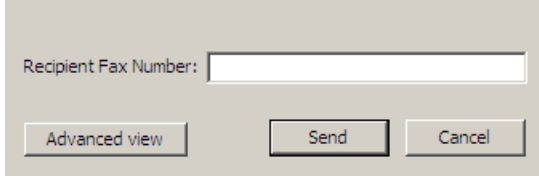
You can change this default according to your needs:

Option	Description
<b>Always display basic interface</b>	SendFAX will be displayed with the minimal interface required for quick faxing (see details below).
<b>Always display full interface</b>	SendFAX will be displayed with the full interface described in this chapter (see <a href="#">Launching SendFAX</a> on page 3).

 **Note:** When accessed via the Windows Start menu, SendFAX will be always displayed with its full interface.

### Basic Interface Overview

The SendFAX basic interface includes a single field for entering the recipient fax number, which is the minimum information required for sending a fax.



Clicking **Send** will immediately send the fax to the specified destination.

The **Advanced view** (full interface) can however be displayed before sending the fax if you wish to benefit from all other SendFAX features.

## Setting the default fax resolution for printing

---


To change the printer driver's default resolution for faxes, proceed as follows:

1. Choose **Edit > Printer Properties**.
2. Click the **Paper/Quality** tab.
3. Click on the **Advanced** button.
4. Set the printer driver's resolution in the **Graphic-Print Quality** field. Choices are **Low(200x100)**, **High(200x200)**, **Fine(300x300)** or **Ultra Fine(400x400)**.  
At the next logon in SendFAX, the program will validate the printer driver resolution. If the printer driver default resolution is higher than the maximum resolution allowed by the user profile, SendFAX sets it to the latter.
5. You can also choose different dithering algorithms through the **Half-toning** option. If you decide to use an Error Diffusion algorithm, you can also adjust the intensity of the rendering.  
This changes the printer resolution for the whole system, and remains so until it is changed again, using the above procedure.

## Sending a Fax


---

To send a fax using SendFAX:

1. Launch SendFAX.
2. If needed, select a cover sheet and type a message in it (see [Using Cover Sheets](#) on page 13).
3. Insert one or more documents to be sent, either via the attachment feature, or by drag-and-drop, or using the XMediusFAX printer (see [Managing Fax Documents](#) on page 13).  
 **Tip:** At this step, you can reorder, cancel, or delete fax pages as you wish. You can also add annotations in the fax preview pane (see [Annotations Overview](#) on page 39).
4. Address the transmission with a fax number, an email address or recipients from your contact lists (see [Addressing Transmissions](#) on page 14).



5. If needed, modify the sender information or the fax transmission settings (see [Modifying Transmission Settings](#) on page 17)
6. If needed, modify the fax resolution (see [Sending a Fax with a Specific Resolution](#) on page 19)
7. Click **Send** to send the fax and close the SendFAX application.


 **Tip:** You can choose **File > Send without Closing** if you wish to compose another fax.


## Using Cover Sheets

---

### Selecting a Cover Sheet


To select a cover sheet, use the drop-down cover sheet menu of the toolbar.

 **Note:** XMediusFAX offers default cover sheets. In addition, the cover sheet editor allows you to compose and save your own cover sheets. Refer to [Cover Sheets Overview](#) on page 75 for more information.

 **Note:** A fax sent to an email address behaves differently when sent with or without a cover sheet. See [Email Behavior With or Without a Cover Sheet](#) on page 7 for more information.

### Adding a Comment to a Cover Sheet

To add a comment to a cover sheet, select a cover sheet and go to **Edit > Cover Sheet Comments**.

 **Note:** When sending a fax to an email address, a default message can be used when no comment is entered on the cover sheet. See [Email Content](#) on page 11 for more information.


## Managing Fax Documents

---


Here is the list of actions available to modify the fax being sent with SendFAX:

### Inserting a Document

It is possible to add pages to the fax you are composing by using existing documents. A lot of file types are supported: it can be, for example, a Microsoft Office document, a basic text file, an image, a PDF file...

To proceed, click  and browse for the file to insert.


All the pages of the selected document are converted into the TIFF format and inserted as new pages after the last page of your fax.

 **Note:** More than one document can be added to the same fax.

### Reordering Fax Pages

The pages of the fax being sent can be reordered through the Thumbnail View.


To proceed, select a page and use the  and  buttons to move it up and down.


 **Note:** You can also quickly move the page to the first or last page of your fax by selecting **Thumbnail > Move** and choosing **First** or **Last**. Note that “first” means “the first page after the cover sheet”, if there is a cover sheet.

Another way to move the pages can be dragging and dropping the page through the Thumbnail View (insertion point will be indicated by two yellow arrows during the dragging phase).

### Canceling the Transmission of a Page

This function can be useful when you want to send only a part of your fax without having to physically remove the undesired pages.

To mark the pages that will not be sent with the fax, select them in the Thumbnail View and click .


All the cancelled pages are marked with a red sign. If you need to restore the cancelled pages, just select them and click again the  button.

### Deleting a Page

To physically remove a page from the fax, select it and click  above the Thumbnail View.


### Saving a Fax

To save a copy of the fax in your PC, select **File** ► **Save As**.

 **Note:** The faxes are saved in the TIFF format.

### Printing a Fax

To print the current fax, select **File** ► **Print**.

 **Note:** For setting a specific print resolution as default, see [Setting the default fax resolution for printing](#) on page 12.

## Addressing Transmissions

---

You can address a transmission by entering manually a recipient or by selecting a contact from one of your phone books.


More than one recipient can be added to the recipient list of the fax being sent. Also, that list can be easily modified.

### Manually addressing a transmission


---

How to address manually a fax from SendFAX.

1. Type a name in the **To** field.
2. If desired, type an entry in the **Company** field.
3. Type a fax number or an email address in the **Destination** field. Only this entry is mandatory.

 **Tip:** If you need to add a DTMF code (such as an extension number or a long-distance code), you can enter it after the fax number, preceded with one or several pauses (comma or letter p – not case sensitive).

For example: (514) 222-3333p1234 (equivalent to (514) 222-3333,1234).

4. If desired, type an entry in the **Subject** field.
5. Click .


The recipient is added to the **Recipients** list.

- 👉 **Note:** It is possible to add a recipient from the recipient list to your Phone Book, even if the Phone Book is not displayed: just right-click on the recipient and select **Add to Phone Book**.

### ***Selecting a recipient from a phone book***


---

How to address a fax by selecting a recipient from a phone book in SendFAX.

1. Choose **View > Phone Book > Show Right** if the phone book is not displayed on the right of the SendFAX interface.
2. If necessary, use **Show names from the** to select the correct contact list.
3. Type a recipient's name or select a group or individual recipient from the contact list.
4. Click .

The recipient is added to the **Recipients** list.


- 👉 **Note:** If the contact **Preferred Address** is an email, the fax will be sent to the email address and not to a fax number. See [Phone book contacts](#) on page 25.

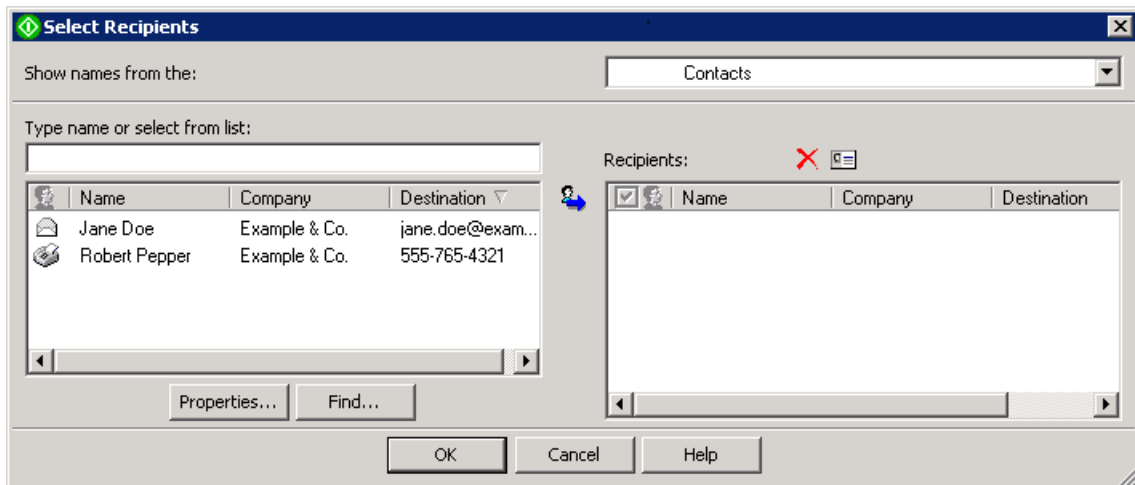
- 👉 **Note:** Any recipient of the **Recipients** list can also be added to your phone book, by clicking .


### ***Selecting a recipient when the phone book is not displayed***

---

How to select a recipient from a phone book in SendFAX when the phone book is not displayed in the interface.


1. In SendFAX, click  or the **To** button.  
SendFAX displays the phone book in a separate window.



2. If necessary, use **Show names from the** to select the correct phone book and contact list.
3. Type the name or select the recipient from the phone book.
4. Click .

The recipient is added to the **Recipients** list.

- 👉 **Note:** It is possible to add more than one recipient using this way.

 **Note:** If the contact **Preferred Address** is an email, the fax will be sent to the email address and not to a fax number. See [Phone book contacts](#) on page 25.


5. Click **OK** to close the phone book.

### ***Modifying the Recipients List***

---

How to modify parameters within the recipients list in SendFAX.


You may need to change some information or parameters of the recipients after having added them to the **Recipients** list.

 **Note:** Any modification applied this way to the recipients do not affect the information contained in the phone book, but only for the fax being sent.

Here are the possible actions:

#### **Editing the fax recipient information**

This option allows you to change some information of the recipients, only for the fax being sent, without changing anything in the phone book.

To proceed, select the recipient in the **Recipients** list and click .

#### **Changing the recipient destination**


This option can be useful when the contact has more than one fax number or email address and you wish to select another one than the default one for the fax being sent.

To proceed, right-click on the recipient in the **Recipients** list, select **Destinations** and choose the fax number or email address to use for the transmission.

#### **Filtering the recipients list for the transmission**


This option allows you to deselect/select recipients of the **Recipients** list in order to send them or not the current fax. It can be useful if you need to address two slightly different versions of the same fax to two different batches of recipients that are in the same recipient list.


To proceed, check or uncheck the box beside the name of each concerned recipient in the **Recipients** list.

 **Note:** Once the fax is sent to the first batch of recipients, the recipients list and the fax are still displayed, so you can modify the fax and send it to a second batch of recipients only by checking and unchecking boxes.

#### **Deleting a recipient from the recipient List**

This option simply removes the recipient from the **Recipients** list.

 **Note:** There is no possible undo.

To proceed, select the recipient in the **Recipients** list and click .

## Modifying Transmission Settings

---

### Editing sender or company information


---

How to modify the information appearing on a fax in SendFAX.

You must have the modifications rights at this level. If not, please contact the administrator.

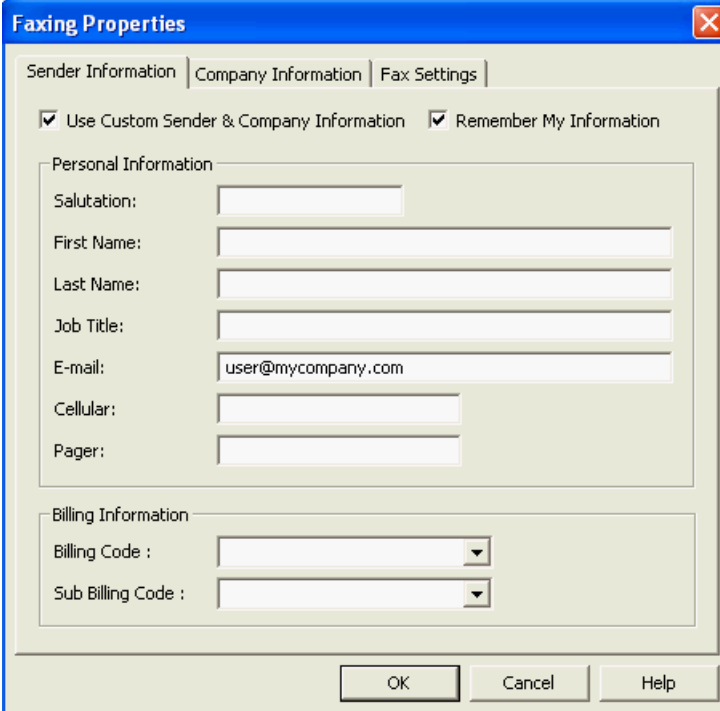
You might need to modify sender and company information that will appear on the fax being sent, without modifying this information as it is written in the XMediusFAX database. For example, it might be necessary to edit sender information when you send a fax on behalf of another user.

Changes to sender and company information are applied only to the current fax, and the next time you will use SendFAX, all this information will be taken back from the fax server database.

 **Note:** You can however choose the option to remember your changes for all future transmissions through SendFAX. It will not affect, anyway, your real information written in the database.


To proceed:

1. Click .
2. In the **Sender Information** tab, check the **Use Custom Sender & Company Information** box.

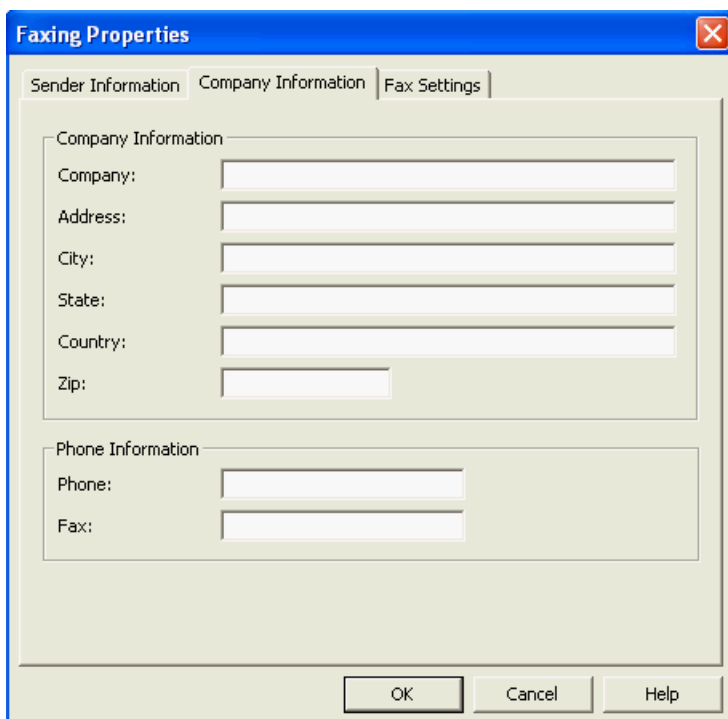


The screenshot shows the 'Faxing Properties' dialog box with the 'Sender Information' tab selected. At the top, there are three tabs: 'Sender Information', 'Company Information', and 'Fax Settings'. Below the tabs, there are two checked checkboxes: 'Use Custom Sender & Company Information' and 'Remember My Information'. The 'Personal Information' section contains the following fields: Salutation (empty), First Name (empty), Last Name (empty), Job Title (empty), E-mail (user@mycompany.com), Cellular (empty), and Pager (empty). The 'Billing Information' section contains two dropdown menus: Billing Code (empty) and Sub Billing Code (empty). At the bottom of the dialog, there are three buttons: OK, Cancel, and Help.

You can now modify the fields.

 **Note:** If you check the **Remember My Information** box, the changes will be used as well for future SendFAX sessions.

3. To modify the Information of the company, select the **Company Information**.



The image shows a Windows-style dialog box titled "Faxing Properties". It has three tabs: "Sender Information", "Company Information", and "Fax Settings". The "Company Information" tab is currently selected. Inside this tab, there are two sections: "Company Information" and "Phone Information". The "Company Information" section contains six text input fields labeled "Company:", "Address:", "City:", "State:", "Country:", and "Zip:". The "Phone Information" section contains two text input fields labeled "Phone:" and "Fax:". At the bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Help".

4. Click **OK** to apply the information to the transmission.

### ***Changing fax transmission settings***

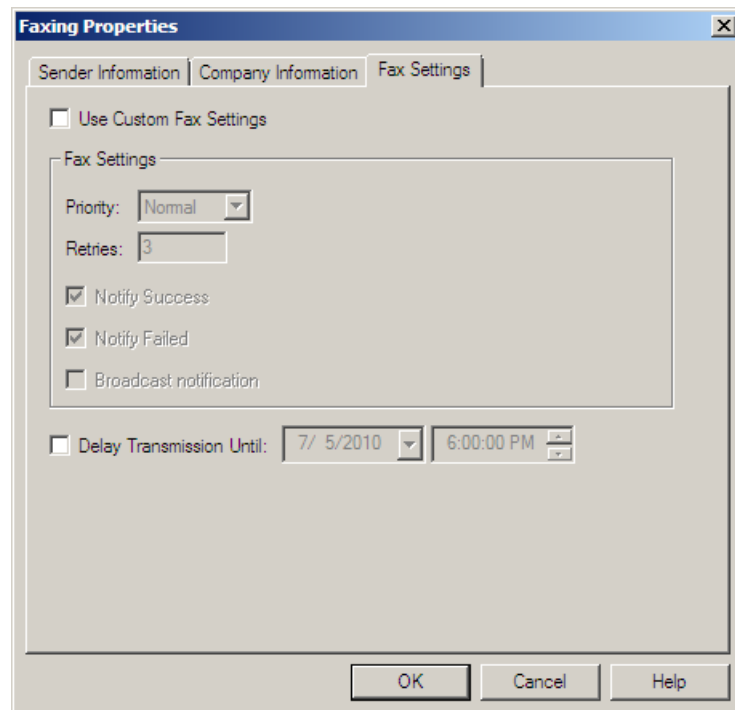
---

How to change the transmission settings for a fax in SendFAX.


You must have the modifications rights at this level. If not, please contact the administrator.

Transmission settings include the fax priority and the number of retries, and notification options.

1. Select **Edit > Faxing Properties**.
2. Select the **Fax Settings** tab.



3. Check the **Use Custom Fax Settings** box.

 **Note:** This will apply the custom fax settings to all future fax transmissions. To change the settings only for one transmission, you need to return to this dialog and uncheck the **Use Custom Fax Settings** box.


4. Use the **Priority** dropdown box to select *High, Normal, or Low*.

5. Type a **Number of Retries**.


The highest available number is 99.

6. To enable or disable the notifications for the fax, check or uncheck the **Notify Success** or **Notify Failed** boxes.

7. If you want to enable or disable the reception of a single notification (summary) after a broadcast fax emission, check or uncheck the **Broadcast Notification** box.

 **Note:** Enabling this type of notification does not suspend the other outgoing fax notifications. If you leave the **Notify Success** and **Notify Failed** boxes checked, the profile is still set to receive notifications for all the fax communications inside a broadcast.

8. If you wish to delay the sending of the current fax, check the **Delay Transmission Until:** box and enter a date and time for the delay.

 **Note:** The transmission delay will apply only to fax transmission towards fax numbers. Fax transmissions towards email addresses will be sent immediately.

9. Click **OK** to apply the settings to the transmission.

## ***Sending a Fax with a Specific Resolution***

---

Prior to sending a fax, you can change its resolution using the procedure in [Setting the default fax resolution for printing](#) on page 12.

## Displaying Phone Books

How to add the phone book to the SendFAX interface.

1. Select the source of your contacts:
  - a) In the menu bar, choose **View > Options**.
  - b) Select **XMediusFAX Phone Book** or **MAPI Address Book**.
  - c) Click **OK**.
2. Select **View > Phone Book**, then choose **Show Right** or **Show Left**, depending on the display you wish to obtain.

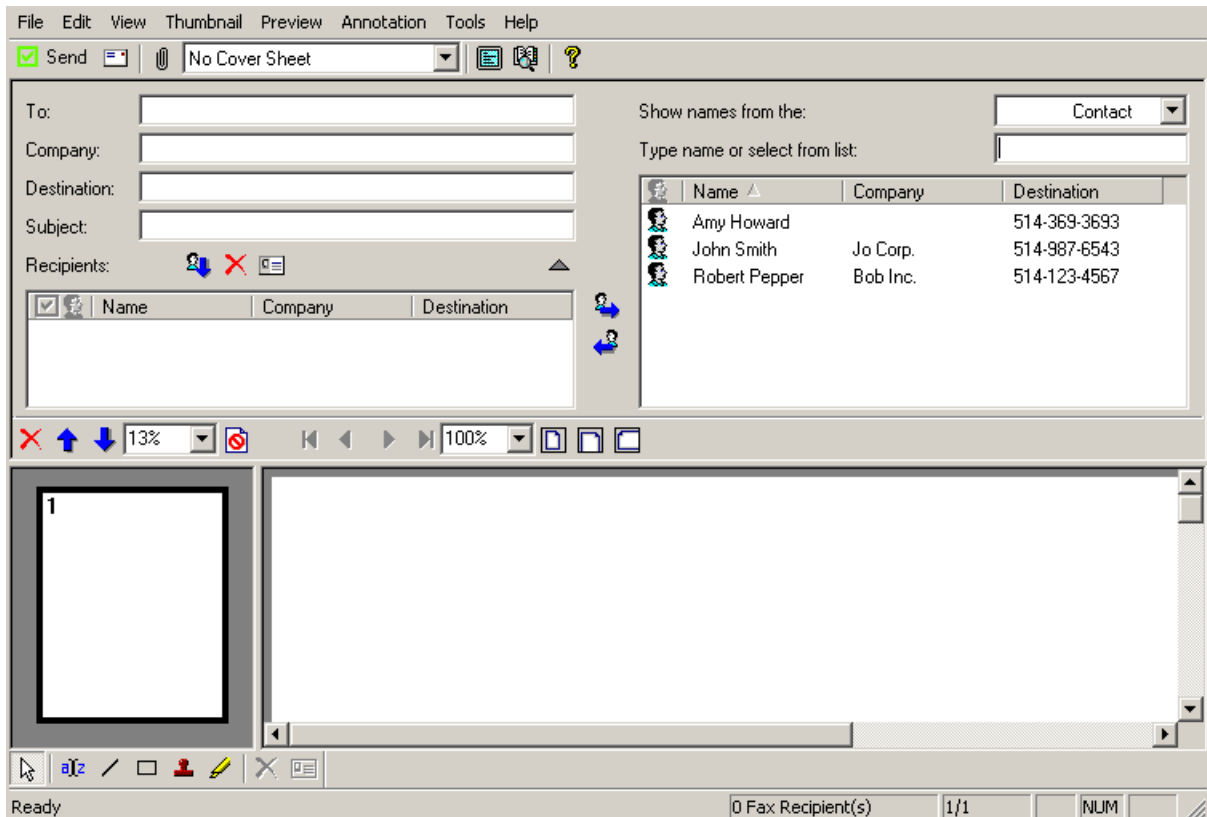


Figure 1: The “Show Right” display



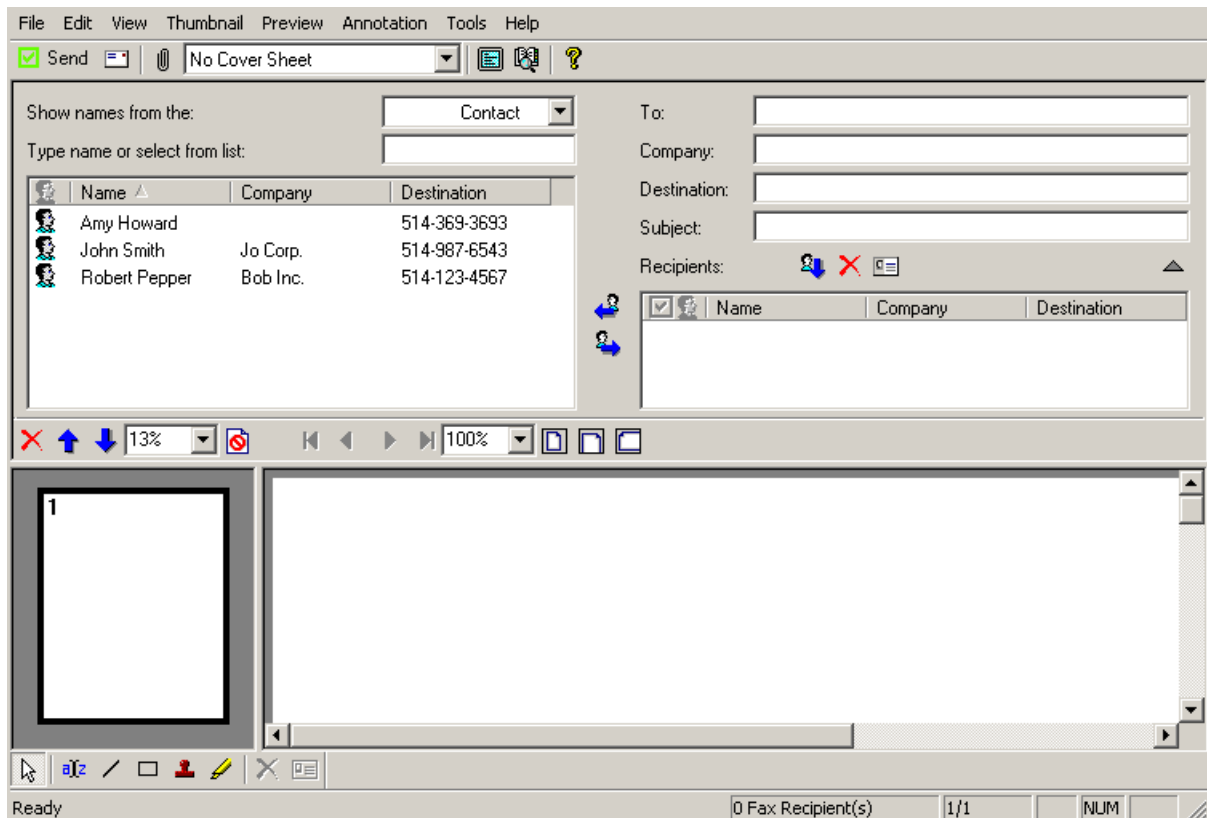




Figure 2: The “Show Left” display

**Note:** With the phone book displayed, you can hide or display the manual addressing fields (**To**, **Company** and **Destination**) by using the  or  button above the **Recipients** list.

3. If you have more than one list of contacts in your Phone Book, you can display them alternately by using the **Show names from the** drop-down list.
4. If you need to remove the Phone Book from the SendFAX interface:
  - a) Select **View > Phone Book**.  
The current display selection appears checked in the sub-menu.
  - b) Select this checked item.  
The Phone Book disappears from the SendFAX interface.

**Note:** This documentation assumes that phone book information is displayed on the right side of the SendFAX interface.

## Submitting a Fax With SendFAX Through a Command Line


How to send a fax in silent mode.

**Note:** This section concerns advanced users.

It is possible to accelerate the sending of a fax with SendFAX by using a command line instead of opening the application.


From the `install_path\client` folder, enter the following command line:


```
SendFax.exe
```

 **Note:** This command opens SendFAX application.

The available arguments for the command line are:

- -c: To enter the recipient information;
- -a: To attach a file to the fax;
- -s: To define the subject of the fax;
- -q: To send the fax and quit automatically the application. When it is absent, SendFAX opens with all the destinations and you must click on the **Send** button to send the faxes.

 **Note:** Dashes used in front of the arguments can be replaced by slashes.

 **Important:** The `fax=` or `email=` information must be present in the recipient information (`/c`) otherwise the fax will not be sent. The fax number or email address must be valid. To send to an email address, the `fax=` information must not be present in the recipient information, if information for both the `fax=` and `email=` appear, the fax number will take precedence. A recipient information line must be created for each fax number and each email address.

For example:

```
SendFax.exe /s "This is the subject" /a "attach_file.tif" /c
"fax=5141234567/fn=Jane/ln=Smith/co=MyOrganization /email=jane.smith@example.com" /c
"fax=5147654321/fn=John/ln=Smith/co=MyCompany" /c
"email=robert.pepper@example.com/fn=Robert/ln=Pepper/co=Example & Co." /q
```

In this example, the fax would have:

- “This is the subject” for Subject
- “attach\_file.tif” as attached file
- Three recipients:
  - Jane Smith, 514.123.4567, MyOrganization, jane.smith@example.com
  - John Smith, 514.765.4321, MyCompany
  - Robert Pepper, robert.pepper@example.com, Example & Co.
- Sent silently (/q)

The first two are sent to fax numbers and the third is sent to an email address.

Here is a list of the available fields for a fax sent by command line:

Fields	Description
dear=, first= or fn=, last= or ln=	Basic information concerning the recipient
address=, city=, state=, zipcode=, country=	Recipient Addressing information
phone=, pager=, cellular=, email=, fax=	Recipient Contacting information
company= or co=, jobtitle=	Company and title of the recipient
billingcode= or bc=, subbillingcode= or sbc=	Billing Code and Subbilling Code of the recipient

## Chapter 3 *Managing Your Contacts (for SendFax)*

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### *Overview*

---

A phone book stores contact information about recipients for SendFax. This information can include a contact's name, fax number, address, company and business address, etc. There can be any number of individual contacts. You access the phone book in SendFAX to address faxes to the contacts recorded in the phone book.

XMediusFAX provides a single un-populated phone book. It resides in the `<install_path>\Client` folder. You can add phone books to that or any other folder. Phone book files have the `.xmc` extension.

You can create as many phone books as needed. The contents of a phone book can be:

- defined using the XMediusFAX phone book,
- imported to the phone book from an external data source, or
- linked in the phone book to an external data source.

In the first two cases, the information actually resides within the phone book. You can modify it whenever necessary. In the third, XMediusFAX links to an external source; the information is only displayed through the phone book. If information is to be changed or updated, you must update the external source using the software that created it.

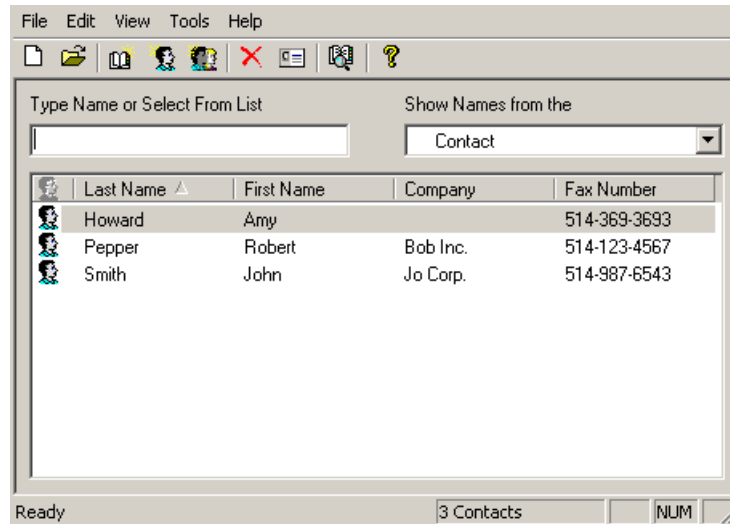
### *Launching the phone book*

---

To launch the phone book:

- Among your installed **XMediusFAX** applications, choose **Phone Book**; or
- In SendFAX, choose **Tools** ► **XMediusFAX Phone Book**.

The default phone book and contact list or those you last opened are automatically displayed. An example is depicted in the following screenview.



**Figure 3: View of the phone book**

By default, a phone book displays contact information in four columns: **Last Name**, **First Name**, **Company**, and **Fax Number**. However, you can adjust the column headings to display any of the information fields available in the phone book.

You can select any column heading as the sort key. For example, the default sort key is **Last Name** in ascending order. If you wish, you can select **Fax Number**, **Company**, or any other displayed column heading as the sort key. Sort order can be ascending or descending.

To insert or delete a column, right-click on the heading bar and select **Insert Column** or **Remove This Column**.

**Note:** When inserting a new column, it is automatically added on the left of the clicked column heading.

## Menu Bar Details and Associated Icons


Description of all the items of the Phone Book menu bar.

### The File Menu

	<b>New</b>	allows you to create a new phone book, a new contact list within an existing phone book, a new contact in a contact list, and a new group of contacts.
	<b>Open</b>	allows you to open an existing phone book, a contact list, or a public phone book, if existing.
	<b>Save As</b>	saves a newly created phone book.
	<b>Import</b>	imports data from an external data source.
	<b>Link</b>	links a phone book to an external data source.
	<b>Link Fields</b>	allows you to update the links that match the fields of an external data source to the phone book's internal fields.
	<b>Exit</b>	closes the phone book.

### The Edit Menu


	<b>Properties</b>	displays the properties of a selected contact or group.
--	-------------------	---

	<b>Delete</b>	deletes a selected contact, group or contact list.
	<b>Select All</b>	selects all contacts in the currently displayed contact list.

### The View Menu

<b>Display Name</b>	switches the order in which names are displayed.
<b>Toolbar</b>	displays or hides the toolbar at the top of the phone book window.
<b>Status Bar</b>	displays or hides the status bar at the bottom of the phone book window.
<b>Languages</b>	enables the choice of language.

### The Tools Menu

	<b>Find Contacts</b>	performs a search for a contact.
	<b>Advanced Find</b>	performs a search for a contact and allows more detailed search criteria.
	<b>Contact List Management</b>	lets you rename, edit, and delete the contact lists already present in the phone book.
	<b>Compact Database</b>	compacts the phone book database.

## Phone book contacts

---

A phone book is composed of at least one contact list. A contact list is a list of potential fax recipients detailing their first name, last name, company name, and address, fax number, e-mail address, etc. A phone book can have any number of contact lists, however, only one contact list can be used at a time. A default contact list named `Contact` is generated when you create a new phone book.

In the phone book, contact lists are chosen using the **Show Names from the** drop-down list (see the figure in [Launching the phone book](#) on page 23).

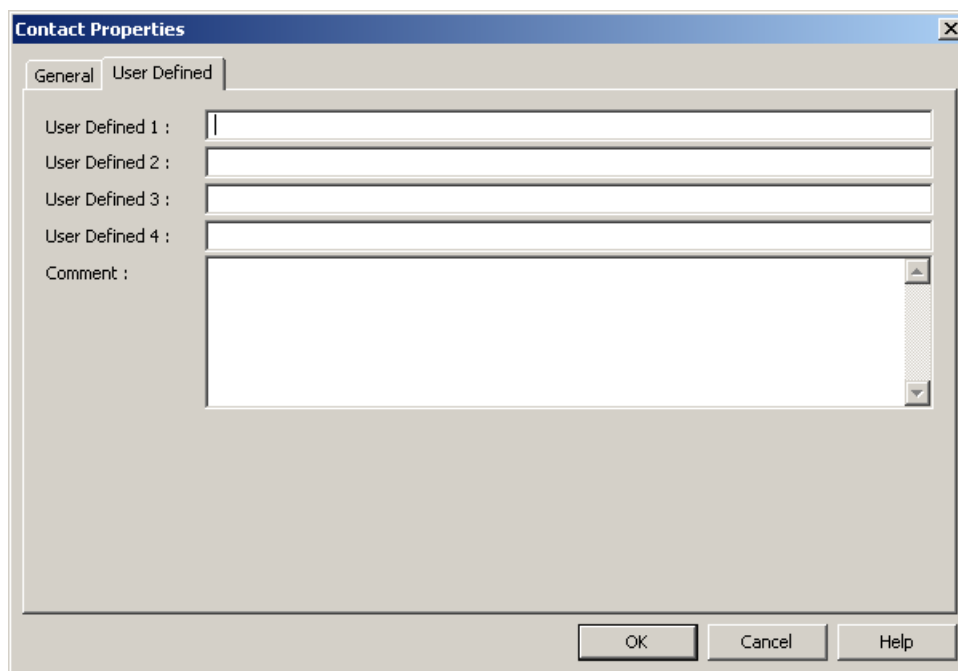
Ample information fields are available for every contact. These fields are accessible by selecting **Edit ► Properties** after having selected a contact or alternatively by right-clicking on the desired contact from amongst those in the contact list. A sample screenview is depicted below:

**Note:** Up to three Fax numbers and up to three Email addresses are available by clicking on the ▼ opposite either of these respective information fields. The **Preferred Address** field allows you to select the one that SendFAX will use when several are specified.

If the **Preferred Address** is an email, the fax will be sent to the email address and not to a fax number.

Clicking **Full Name** allows you to enter a title (Dr., Mr., Miss, Mrs., or Prof.) and first and last names, as depicted in the following screenview. The title will appear as a salutation in the fax.

Additional information can be entered clicking the **User Defined** tab. For example, having entered the company address in the address fields, you might wish to use the **User Defined** fields to enter a contact's personal address. Four user-defined fields and a comment field are provided, as depicted in the following screenview:



## ***Managing Phone Books***

---

### **Opening a Phone Book**

To open a phone book click  and select a .xmc file.

### **Adding a Phone Book**

To add a phone book click  then name the new phone book and click **save**.

You can now populate the default contact list with contacts and, optionally, with groups.

## ***Managing Contacts Lists***

---

### **Adding a Contact List**

To add a contact list, click  then name the new contact list.

### **Renaming and Deleting a Contact List**


It is possible to rename or delete a contact list via the contact list management menu. To proceed, go to **Tools > Contact List Management** then select a contact list.

## ***Managing Contacts***

---


### **Adding a Contact**

To add a contact, click  then fill in the contact information.


 **Note:** No field in the contact information is mandatory. The phone book prompts for a first name when none is entered. However, you are not obliged to enter one. You can even create an empty contact for later completion.

### **Deleting a Contact**

To delete a contact, select a contact and click .

 **Note:** Contacts are listed as individuals and as group members. Deleting an individual contact deletes that contact from any group it is members of.

### **Editing a Contact**

To change a contact's properties, select a contact then click .

## ***Phone Book Groups***

---

A group is composed of a number of individual contacts and, optionally, other groups. By selecting a group when faxing, you fax to all contacts in it. A contact list can include any number of groups.

The contacts you place in a group remain listed as independent contacts in the contact list. If you delete the group, the members remain available as independent contacts. If you delete them as individual contacts, however, they are also deleted from the group.


The sections immediately following provide details on how to manage your groups.

### **Adding a Group**


To add a group click  and name the new group.


 **Note:** It is possible to add new or existing contacts to the group while creating it.

### **Managing a Contact or Group in a Group**

To add a contact or group to a group or to remove a contact or group from a group, select a group then click .

### **Deleting a Group**

To remove a group click .

 **Note:** Contacts are listed as individuals and as group members. Deleting a group does not delete a contact's individual listing.



## Compacting the Database

---

In order to retrieve the space of unused fields of the contacts information, it is possible to compact the database. To process, go to **Tools > Compact Database**.

## Phone book searches

---

The phone book offers a basic find and an advanced find. The basic find searches a single contact list and specifies the exact entries you expect to find in information fields like **First Name**, **Last Name**, and **Fax Number**.

An advanced find allows you to specify a wider range of criteria. You can select any of the information fields available and specify several search criteria. Further, an advanced find can specify more than one contact list.

Both types of searches can be saved and re-used later.

The sections immediately following provide details on how to perform searches.

## Finding a contact

---


1. In the phone book, choose **Tools > Find Contacts**.

The phone book offers **Name**, **Company**, **Fax Number** and **City** as search criteria.

2. Type the appropriate entries.

 **Note:** Use  to change **City** to **State/Province** or **Country**.

3. Select **Save As** and enter a name if the search is to be saved.

 **Note:** Saved searches can be retrieved and executed using the **Show Names from the** selection box, at the top right of the phone book window. They are listed under the **View** heading.

4. Click **Find Now**.

5. If necessary, click **Advanced** to switch to an advanced search. For details on performing advanced searches, refer to the following section, [Using advanced find](#) on page 30.

## Using advanced find

---

1. In the phone book, choose **Tools > Advanced Find**.

**Note:** By default, the current contact list is selected. Use **Browse** to select or deselect contact lists.

2. Under **New Criteria**, use **Field** to select an information category.
3. Use **Condition** to select a condition. Conditions include **contains**, **is exactly**, **begins with**, **doesn't contain**, **is empty**, and **is not empty**.
4. Under **Value**, type an entry that represents the expected results. The **is empty** and **is not empty** conditions require no **Value** entry.
5. Click **Add to List**.

**Note:** You can specify one or more criteria. Use **Remove** to make any corrections.

6. Under **Options**, select **Match any criteria** when two or more criteria exist and any one fulfills the conditions of the search.

**Note:** To apply every criteria to the search, select **Match all criteria**.

7. Select **Save As** and enter a name if the search is to be saved.

**Note:** Saved searches can be selected and run using **Show Names from the**. They are listed under the heading **View**.

8. Click **Find Now**.
9. If necessary, click **New Search** to create another search.

## External data sources

---

External data sources can be imported into a phone book, either as a new contact list or into an existing contact list. Once resident in the phone book, the contacts can be updated like any other contact. Possible external data sources are:

- Borland dBASE III, IV, and 5
- Microsoft FoxPro 2.0, 2.5, 2.6, and 3.0
- Corel Paradox 3, 4, and 5
- Symantec ACT!
- Microsoft Access (including Access 2007)
- An ODBC-compliant (Open DataBase Connectivity) data source
- Microsoft Excel 3.0, 4.0, 5.0/7.0, 97, 2000, XP and 2003
- A comma separated value (.csv) text file. In a text file data source, the values are delimited by commas.
- XMediusFAX Phone Book
- LightningFAX Phone Book

External sources might be a worksheet in a spreadsheet or a table in a database that contains a list of names and fax numbers. By importing the source, you import the names and fax numbers into the current contact list.

The external source should be properly organized, with field names that correspond in meaning, if not in exact phrasing, to the information fields used by the phone book. For example, a field called **Name** in an external data source might include both first and last name. **First Name** and **Last Name**, however, are two distinct fields in the phone book. You may wish to update the external source before importing it.

You may need to assign fields being imported to the corresponding fields offered by the phone book. When field names match phone book names closely or exactly, XMediusFAX automatically links the field in the external source to the corresponding phone book field. When field names do not correspond, you are given an opportunity to link them manually.

## Importing an external data source

---


Although other external sources are available, this example imports information from a Microsoft Excel spreadsheet.

1. In the phone book, choose **File > Open** to select the correct phone book.

 **Note:** If necessary, use **Show Names from the** to select the correct contact list.

2. Choose **File > Import**.

3. Use **Select the format of your database** to select Excel.

 **Note:** Click **First Row Contains Field Name** if the first row of the spreadsheet represents the field names or column headings.

4. Type the path and name of the file in the field provided. Alternatively, click **Browse** to navigate the file, select it, and click **OK**.

5. Click **Next**.

6. Select the worksheet that contains the contact information.

7. Click **OK**.

The phone book attempts to match corresponding fields. However, should field names in the external source not match, you must perform the link yourself by clicking in the right hand column where the phrase **No Link** appears. A pull-down list displays the phone book fields available. Use **AutoMatch** to instruct the phone book to apply the most likely match. Use **Reset** to clear all matches and begin again.

8. Click **Finish**.

## ***Linking to an external data source***

---

External data sources can be linked to a phone book. A linked external source is always treated as a new and distinct contact list. XMediusFAX uses the name of the table or worksheet as the name of the contact list. The name, which must be unique, can be changed either during the linking operation or afterwards through **Edit > Rename**. It is subsequently displayed in the **Contact List** field.

You cannot link an external contact list into an existing contact list.

The contacts in a linked contact list cannot be edited or updated through XMediusFAX. The phone book displays this information in read-only format. If contact information in a linked contact list is to be changed, you must update the source itself. Contacts in a linked contact list cannot be assigned to a group. Additional contacts cannot be added, individual contacts cannot be deleted directly through the XMediusFAX Phone Book.

Because linking is dynamic, the changes you make to the contents of source are reflected in the linked contact list.

You can update the fields in a linked contact list. For example, if you add a new field to the source, or change the field name of an existing field in the source, it may be necessary to link it to a specific phone book field.

An example is provided in the section immediately following.

### ***Linking procedure***

---

Although other formats are available, this example links information from a Microsoft Excel spreadsheet.

1. In the phone book, choose **File > Link**.
2. Use **Select the format of your database** to select Excel.
3. Click **First Row Contains Field Name** if the first row of the spreadsheet represents the field names or column headings.
4. Type the path and name of the file in the field provided. Alternatively, click **Browse** to navigate the file, select it, and click **OK**.
5. Click **Next**.
6. Select the worksheet that contains the contact information.
7. Click **OK**.


The phone book attempts to match corresponding fields. However, should field names in the external source not match, you must perform the link yourself by clicking in the right hand column where the phrase **No Link** appears. A pull-down list displays the phone book fields available. Use **AutoMatch** to instruct the phone book to apply the most likely match. Use **Reset** to clear all matches and begin again.

8. Click **Finish**.

### ***Updating a linked external source***

---

1. In the phone book, use the drop-down menu to select the linked contact list.
2. Choose **File > Linked Fields**.  
The **Set Link** window appears.
3. Use the pull-down list by right-clicking the right hand column for the appropriate field.
4. Select the phone book field that best corresponds to the external field name.
5. Click **Finish**.

 **Note:** **Reset** sets all phone book fields to **No Link**. **Reset** might be used when a linked external source is greatly modified and a good many links must be manually assigned.



## Chapter 4

## Viewing Faxes

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### Overview

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The Viewer lets you view the content of your faxes. When it is installed on your computer, it opens automatically when you select the viewing feature on a fax from your fax list.

Through the Viewer, you can:

- have a global view of the fax pages through a thumbnail view of all pages
- rotate the fax pages and use a zoom tool for a better display


But also:

- annotate the fax
- print the fax
- e-mail the fax
- save a local copy of the fax

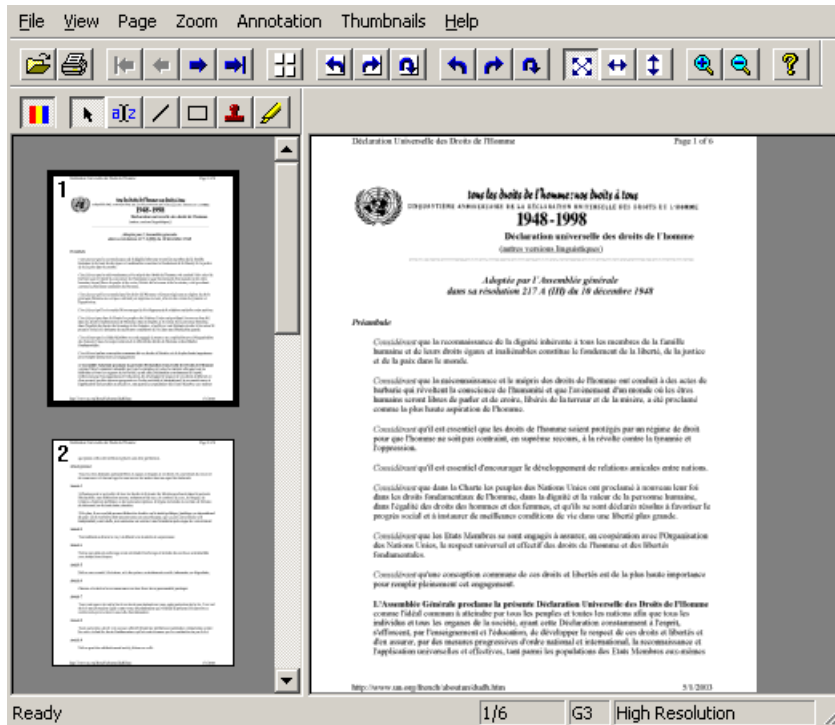
### Launching the Viewer

---

Among your installed **XMediusFAX** applications, choose **TIFF Viewer**.

 **Note:** When you choose to view a fax from your list of faxes, the fax opens automatically in the Viewer.

The viewer will be displayed, as depicted in the following screenview (with an example of fax):



At the top, several display and annotations tools are available (listed in section: [Menu Bar Details and Associated Icons](#) on page 36). On the left is the thumbnails view, where you can see all the pages of the fax, and on the right is the main view, where you can see the page selected in the thumbnails view.

## Menu Bar Details and Associated Icons

### The File Menu

	<b>Open</b>	Opens an existing TIFF file. The TIFF file format is used for faxes.
	<b>Print Fax</b>	Sends the fax to a printer.
	<b>Send to ► Mail Recipient</b>	Launches the default e-mail software and puts the fax as e-mail attachment.
	<b>Save As</b>	Saves a copy of the fax (or only a part) under a new name.









### The View Menu

The **View** menu tab displays the **Main Toolbar** and **Annotation Toolbar** options which toggle their respective tool icons.






### The Page Menu

	<b>First</b>	Displays the first page of the fax in the viewer's main view.
	<b>Previous</b>	Displays in the main view the page immediately before the one currently in the main view.



	<b>Next</b>	Displays in the main view the page immediately after the one currently displayed in the main view.
	<b>Last</b>	Displays the last page of the fax in the main view.
	<b>Rotate Left</b>	Rotates the page currently in the main view 90 degrees to the left.
	<b>Flip</b>	Rotates the page currently displayed in the main view 180 degrees.
	<b>Rotate Right</b>	Rotates the page currently displayed in the main view 90 degrees to the right.
	<b>Rotate All Left</b>	Rotates all pages 90 degrees to the left.
	<b>Flip All</b>	Rotates all pages 180 degrees.
	<b>Rotate All Right</b>	Rotates all pages 90 degrees to the right.
	<b>Properties</b>	Displays the page properties, compression method, as well as resolution and size of image.

### The Zoom Menu

	<b>Zoom in</b>	Selects the next display scale.
	<b>Zoom out</b>	Selects the previous display scale.
	<b>Fit to height</b>	Resizes the height of the page to the view.
	<b>Fit to width</b>	Resizes the width of the page to the view.
	<b>Best fit</b>	Selects the best scale to fit the page to the view.
	<b>25% to 200%</b>	These are pre-set scales.
	<b>100%</b>	The default scale (actual size).
	<b>Custom</b>	Displays a window through which you can enter a zoom percentage.

### The Annotation Menu

Annotations are notes and objects added to a document within other applications such as SendFAX and the Viewer.

For more information about annotations refer to the concerned chapter ([Overview](#) on page 39).

### The Thumbnails Menu


The **Thumbnails** menu offers three image sizes to display the main image in a thumbnail view on the left side of the Viewer.

## Working with the Viewer

---


### Opening a Fax in the Viewer

To view a fax in the Viewer from a file, select **File ► Open** and browse for the file.

 **Note:** The file must be a TIFF file generated by the Fax Server. It can contain more than one page.

### Opening a Fax from the Fax List


It is possible to view a fax directly from your fax list (received or sent) by selecting the viewing feature for the concerned fax. The Viewer opens then automatically.

 **Note:** Faxes opened from your fax list are stored in the server mediastore and cannot be modified. However, you can save a local copy of the fax if you wish to keep the modifications applied with the Viewer (see [Saving a Local Copy of a Fax](#) on page 38).

### Managing the Viewer Display Settings

The Viewer allows you to change the fax pages display in a variety of ways, by using the displaying and zooming tools (see [The Page Menu](#) on page 36 and [The Zoom Menu](#) on page 37).

Also, the thumbnail view (on the left) allows you to have a global view of the fax when it contains more than one page, and easily browse in these pages (see [The Thumbnails Menu](#) on page 37).


 **Note:** By default, the pages are displayed in a vertical way, but you can extend the size of the thumbnail view to the right in order to view them side by side in rows, if the fax contains a lot of pages.

### Adding Annotations

To add annotations to your fax, please refer to the concerned chapter: [Overview](#) on page 39.


### Saving a Local Copy of a Fax

If you have made modifications to a fax, for example, by adding annotations, you may wish to save a local copy on your computer's hard drive, leaving the original unmodified. To save a local copy, select **File > Save As**, browse for the location and enter the name of the new file. The `.tif` extension is automatically applied.

 **Note:** If the fax was already open from a local file, you can also select **File > Save** if you wish to update the file without making a copy.

If you wish to save partially the fax (only some pages), select the **Pages range** option and indicate the concerned pages in the field. For example:

- 1-5, if you wish to save the pages from 1 to 5.
- 1, 5, if you wish to save the pages 1 and 5.
- 1, 3-5 if you wish to copy the pages 1, 3, 4 and 5.

 **Note:** You can do a combination;

### Printing a Fax from the Viewer

To print a fax with the viewer, select **File > Print Fax**.

### Emailing a Fax through the Viewer

To email a fax with the viewer, select **File > Send to > Mail Recipient**.

## Chapter 5


## Using Annotations

### Overview

Annotations are notes and objects added to a fax within SendFAX or the Viewer. There are five types of annotations: text, line, rectangle, stamp and highlighter.







Annotations are added by selecting the type of annotation, drawing and adding text if needed. All annotations can be resized and moved around the page. Annotations can also be formatted. Color and thickness can be assigned to lines and rectangles; color, font, and size can be assigned to text.

Annotations that have been added are not permanent. They are superimposed on the page in the Fax Preview page and incorporated in the TIFF file generated when you transmit the document. The source or original document remains unchanged.

 **Note:** The Annotations feature cannot be used on cover sheets when composing a fax in SendFAX.

### Annotation Types

There are five types of annotations available through the **Annotation** Menu or Toolbar's icons :

	Text	draws a text box on the currently displayed page. Type the text immediately after drawing the box. Text boxes can be resized by clicking them and dragging the handles.
	Line	draws a line on the page.
	Rectangle	draws a rectangle on the page.
	Stamp	displays a window through which you select a bitmap (.bmp) file. Select the bitmap file you wish and drag the cursor to form a rectangle. The selected bitmap graphic is written to the page.   <b>Note:</b> Like any annotation, bitmap stamps can be selected and resized.
	Highlighter	draws a rectangular, yellow colored rubber band. Use it to highlight important text.

### Working with Annotations

Here are the possible actions you can do with annotations:

### Adding an Annotation


To add an annotation, select one of the annotation types in the annotation toolbar, then draw by clicking and dragging the cursor on the page.


#### **Note:**

- In the case of a bitmap annotation, you need first to select an image (only files with the `.bmp` extension) through an **Open** window.
- In the case of a text annotation, you can directly write the text in the box after its creation.

All the annotations are modifyable objects that are placed over the page where you draw them. Therefore, you can move, resize or reformat them afterwards (see the following sections).

### Selecting an Annotation

To be able to select an annotation that has been already added, you must enable the  button to activate the pointer. You can then click on the annotation to select it.

 **Note:** It is also possible to select or deselect all the annotations of a page by selecting **Annotations** ► **Select All** or **Annotations** ► **Unselect All**.

### Moving an Annotation


To move an annotation, just drag-and-drop it to the new location on the page.

### Resizing an Annotation

To resize an annotation, select it, then use the appearing handles (black squares around the annotation) to give it the new size.

### Formatting an Annotation


It is possible to modify the visual properties of the line, rectangle and text annotations.

To proceed, select the annotation and click  in the annotations toolbar:

- For the line and rectangle annotations, you can change the color and the thickness of the lines.
- For the text annotation, you can change all the properties of the font and the color of the background.

### Editing a Text Annotation

To edit the text of a text annotation, just select it and enter the new text.

 **Note:** It is possible to edit the text by accessing the properties of the text annotation (see the previous section).

### Deleting an Annotation

To delete an annotation, select it and click  in the annotations toolbar.

### Hiding or Showing the Annotations

If you need to hide or show the annotations you made, select **Annotation** ► **Show Annotation**.

## Chapter 6 *Fax Utilities for General Applications*

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### Overview

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XMediusFAX provides several utilities that allow you to send faxes directly from your general applications. These utilities are of two types:

- Printer drivers, used as normal printers, that convert your current document to a TIFF file that is attached to a fax to be sent via:
  - SendFax (see [Faxing from Windows Applications by Using SendFAX](#) on page 41)
  - Email (see [Faxing From Windows Applications by Using XMPrintToMail](#) on page 42)
  - Web Fax Composer (see [Faxing from Windows Applications by Using the Web Fax Composer Printer](#) on page 43)
- Integrated faxing features:
  - Fax Macros usable in MS Word or in OpenOffice.org Writer (see [Sending a Fax Using the Fax Add-in for MS Word](#) on page 43 and [Sending a Fax Using Fax Macros for OpenOffice.org Writer](#) on page 45).
    - 👉 **Note:** The Fax Macros use SendFAX to finalize the sending.
  - The Microsoft Office Internet Fax Service feature (see [Sending a Fax Using the Microsoft Office Internet Fax Service](#) on page 48).

### *Faxing from Windows Applications by Using SendFAX*


---

If SendFAX is installed on your computer, you can fax from any Windows application installed on your system that has print capabilities. You can perform these fax operations using any Windows application.


1. Open with the appropriate application the document to be faxed.
  - 👉 **Note:** For example, it can be a MS Word document you just wrote and saved.
2. Access the print options of the application (e.g. **Print...** for MS Word).
3. Select the **XMediusFAX** printer in the list of available printers.
  - 👉 **Note:** If you need to set a specific resolution for your fax, click **Properties** ► **Paper/Quality** ► **Advanced**. The **Graphic-Print Quality** field allows you to choose **Low(200x100)**, **High(200x200)**, **Fine(300x300)** or **Ultra Fine(400x400)** quality. After validation, the new resolution setting remains until you change it again. If the printer driver default resolution is higher than the maximum resolution allowed by the user profile, SendFAX rejects the rasterized file, pops up a warning for the user and stays open.

4. Click **OK**.

SendFAX is launched – either its full or basic interface, depending on your SendFAX settings (see [SendFAX Interface Display Options](#) on page 11).

 **Note:** You can print additional documents to the fax being sent, by repeating the previous steps (from the same or any other application).

## 5. Address the fax.


 **Note:** The minimum required is a fax number; SendFAX full interface allows you to benefit from other addressing features (e.g. subject, multiple recipients, phone book...). For more information see [Overview](#) on page 3.

6. Click **Send**.

## ***Faxing From Windows Applications by Using XMPrintToMail***


---

The XMPrintToMail printer driver allows you to send faxes from any Windows application, as if you were printing the document from this application. This driver converts the document into the TIFF format and put it in an e-mail as attachment.

 **Note:** To be able to use XMPrintToMail, the fax server must be interconnected with an e-mail system.

To fax from a Windows application:

## 1. Open with the appropriate application the document to be faxed.


 **Note:** For example, it can be a MS Word document you just wrote and saved.

2. Access the print options of the application (e.g. **Print...** for MS Word).

## 3. Select the XMPrintToMail printer in the list of available printers.

4. If you need to set a specific resolution for your fax, click **Properties** > **Paper/Quality** > **Advanced**. The **Graphic-Print Quality** field allows you to choose **Low(200x100)** or **High(200x200)** quality for the TIFF file to be created.

 **Note:** After validation, the new resolution setting remains until you change it again.

 **Note:** When using XMPrintToMail, if the printer driver default resolution is higher than the maximum resolution allowed by the user profile, you will receive a failure notification.

## 5. Print the document.

Your default e-mail software opens and a new e-mail is created where your document has been added as attachment (TIFF file).

## 6. Address your email according to your e-mail software as for sending a fax. You can either select a contact in your list of contacts (this contact must have a fax number), or type a fax number with the appropriate syntax in the address field.

 **Note:** For example:

- In MS Outlook, type:

[FAX:1234567890]

- In Lotus Notes, type:

Fax=123-456-7890@Fax.com

7. Complete fax composition and setting selection.
8. Send the message.

## ***Faxing from Windows Applications by Using the Web Fax Composer Printer***

---


The Web Fax Composer printer driver allows you to send faxes via the Web Access interface by printing documents from any Windows application. This printer driver converts the document into a TIFF file and uploads it as an attachment in the web fax composition interface. See [Attaching Documents to a Fax by Using the Web Fax Composer Printer](#) on page 121

## ***Sending a Fax Using the Fax Add-in for MS Word***

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Two features have been implemented to send faxes with XMediusFAX from MS Word:

- The **Send Fax** feature, allowing to simply send your current document as a fax.
- The **Fax Merge** feature, allowing to broadcast a fax with a dynamic content by using the MS Word Mail Merge feature.

 **Note:** Both features use the SendFAX application to finalize the sending of the faxes. Therefore, SendFAX must be installed on your computer. If the Fax Add-in for Microsoft Word and/or SendFAX are not installed on your computer, please contact your administrator.



## ***Sending a Fax from MS Word with the Send Fax feature***

---

Before starting, exit SendFAX if it is running.


The **Send Fax** feature allows you to fax any document directly from the MS Word application (via the **XMediusFAX** virtual printer). To do so:

1. Open Microsoft Word.
2. Compose the document that will be used as fax message, and save it.
3. Click on the **Send Fax** feature button:

with MS Word 2003 (or previous versions):		in the toolbar.
with MS Word 2007 (or more recent versions):		under the <b>Fax</b> tab of the Word ribbon.

SendFAX is launched – either its full or basic interface, depending on your SendFAX settings (see [SendFAX Interface Display Options](#) on page 11).

4. Address the fax.

 **Note:** The minimum required is a fax number; SendFAX full interface allows you to benefit from other addressing features (e.g. subject, multiple recipients, phone book...). For more information see [Overview](#) on page 3.


5. Click **Send**.

## ***Fax Merge Feature for MS Word***

---

The Fax Merge feature for Microsoft Word allows you to broadcast a fax whose parts of the message content depend on the recipient (salutation or other personal information). To do so, dynamic fields are inserted in a main document by using the MS Word Mail Merge feature. These fields are linked to an external data source such as an Excel or Access file, your Outlook contacts book, etc.


The overall process can be summarized as follows:

1. Create or identify a data source. The entries made to the data source are the information to appear in the MS Word merge fields.  
 **Note:** The data source must contain a column with all the fax numbers of the recipients. This is the minimum information required for broadcasting a fax.
2. Create a main document, which is the actual fax message, entering the MS Word merge fields that receive the information entered in the data source.
3. Open the main document, map the XMediusFAX merge fields to the external data source fields, and send the fax with SendFAX (see [Sending a Fax from MS Word Using the Fax Merge feature](#) on page 44).

### ***Sending a Fax from MS Word Using the Fax Merge feature***

---

Before starting this procedure, you should have access to an existing data source containing a recipient list (for example, an Excel or Access file, or even your Outlook contact book).

-  **Important:** This data source must contain a column with all the fax numbers of the recipients, which is the minimum information required for sending faxes.


The first steps of the following procedure give the main actions to perform in order to have a document ready for using the **Fax Merge** function. For specific information about the use of the Microsoft Mail Merge feature, please refer to the MS Word online help.

To send a fax with the Fax Merge feature in MS Word:

1. Exit SendFAX if it is running.
2. Open MS Word and start a Mailing/Mail Merge process with the following attributes:
  - The document type must be **Letters**.
  - The starting document must be the current document.
3. Select a database source containing your recipient list.
4. Prepare the content of your fax message, including all the merge fields you need to insert, and save your document.



-  **Note:** If needed, you can preview the result with your contacts values.

5. Stop here the usual mail merge process (do not complete the merge) and continue by following the instructions given in this procedure.

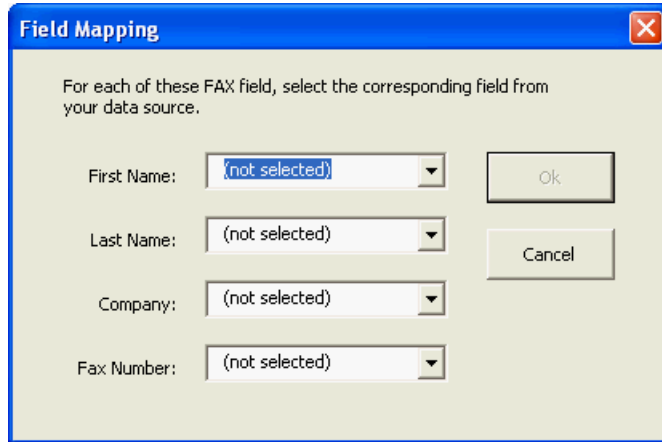
-  **Attention:** If you proceed with the one of the default Mail Merge final options, you will not be able to send your merged documents as separate faxes.

6. Click on the **Fax Merge** feature button:



with MS Word 2003 (or previous versions):		in the toolbar.
with MS Word 2007 (or more recent versions):		under the <b>Fax</b> tab of the Word ribbon.

The **Field Mapping** window opens.




The **Field Mapping** dialog box is shown. It has a title bar with a close button (X). The main text reads: "For each of these FAX field, select the corresponding field from your data source." Below this, there are four rows, each with a label and a dropdown menu:

- First Name: (not selected)
- Last Name: (not selected)
- Company: (not selected)
- Fax Number: (not selected)

On the right side of the dialog, there are two buttons: "Ok" and "Cancel".


7. Map the XMediusFAX fields to the corresponding ones of your data source.

 **Note:** This step is necessary for the fax to be sent correctly. For example, if the XMediusFAX **Fax Number** field is mapped to a field that does not contain a fax number, the emission will fail.

8. Click **OK**.


Your documents are converted by virtual printing, and then SendFAX is launched, showing the fax corresponding to the first record of your data source; all other records also appear in the list of fax recipients.

9. You can add a cover sheet and make an entry to the **Subject** field (they will be common to all faxes).

 **Note:** At this step, you can still remove fax recipients from the list in SendFAX but you cannot add other recipients to it, nor documents to the fax.

10. Click **Send**.


All the faxes of the merge are sent separately for each recipient of the list.

 **Note:** The mapping used to send this document is not saved. Therefore, the next time you fax a main document, you must map again the XMediusFAX fields to the fields of the data source used.

## ***Sending a Fax Using Fax Macros for OpenOffice.org Writer***

Two macros have been implemented for the sending of faxes with XMediusFAX from OpenOffice.org Writer:

- The SendFax feature, allowing to simply send your current document as fax.
- The FaxBroadcast feature, allowing to broadcast a fax with a dynamic content by using the OpenOffice Mail Merge feature.


 **Note:** Both features use the SendFAX application to finalize the sending of the faxes. Therefore, SendFAX must be installed on your computer. If the Fax macros for OpenOffice.org Writer and/or SendFAX are not installed on your computer, please contact your administrator.

## ***Sending a Fax from OpenOffice.org Writer with the SendFax Feature***

---

Before starting, exit SendFAX if it is running.

The SendFax feature allows you to fax any document directly from the OpenOffice.org Writer application (via the **XMediusFAX** virtual printer). To do so:


1. Launch OpenOffice.org Writer.
2. Compose the document that will be used as fax message, and save it.
3. Select **Fax ► SendFax** in the menu.  
SendFAX is launched – either its full or basic interface, depending on your SendFAX settings (see [SendFAX Interface Display Options](#) on page 11).
4. Address the fax.  
 **Note:** The minimum required is a fax number; SendFAX full interface allows you to benefit from other addressing features (e.g. subject, multiple recipients, phone book...). For more information see [Overview](#) on page 3.
5. Click **Send**.

## ***FaxBroadcast Feature for OpenOffice.org Writer***

---

The FaxBroadcast feature for OpenOffice.org Writer allows you to broadcast a fax whose parts of the message content depend on the recipient (salutation or other personal information). To do so, dynamic fields are inserted in a starting document by using the OpenOffice.org Writer Mail Merge feature. These fields are linked to an external data source created with the OpenOffice.org Base application.

The overall process can be summarized as follows:


1. Create or identify a data source. The entries made to the data source are the information to appear in the OpenOffice.org Writer merge fields.  
 **Note:** The data source must contain a column with all the fax numbers of the recipients. This is the minimum information required for broadcasting a fax.
2. Create a starting document, which is the actual fax message, entering the OpenOffice.org Writer merge fields that receive the information entered in the data source (see [Creating a Starting Document in OpenOffice.org Writer](#) on page 46).
3. Open the starting document, map the XMediusFAX merge fields to the external data source fields, and send the fax with SendFAX (see [Sending a Fax from OpenOffice.org Writer with the FaxBroadcast feature](#) on page 47).

### ***Creating a Starting Document in OpenOffice.org Writer***

---

How to create a starting document with the OpenOffice.org Writer Mail Merge feature, in order to send a broadcast fax.

Before starting this procedure, you should have access to an existing data source containing a recipient list.

-  **Note:** This data source must have been created with the OpenOffice.org Base application and must be registered. Also, it must contain a column with all the fax numbers of the recipients, which is the minimum information required for broadcasting a fax.

For detailed information about specific operations, refer to the OpenOffice.org online help.

To create a starting document using the OpenOffice.org Writer Mail Merge feature:

1. In OpenOffice.org Writer, select **Insert > Fields > Other**.  
The **Fields** window opens.
2. Select the **Database** tab.
3. Select **Mail merge fields** in the **Type** list, on the left of the window.
4. In the **Database selection** list, on the right, search for the database that will be used as recipient list.
  - 👉 **Note:** If the OpenOffice.org Base file you previously created does not appear in the list, the reason could be that the database is not registered. Before continuing, please refer to the OpenOffice.org Base online help to register your database.
5. Expand the tree under the database name and double-click each field you need to insert in the document.  
Each field inserted appears with a grey-colored background, at the current cursor position.
6. When done, click **Close**.
7. Save the document.

The starting document is now ready to be used through the FaxBroadcast feature.

To send the created starting document as broadcast fax, see [Sending a Fax from OpenOffice.org Writer with the FaxBroadcast feature](#) on page 47.

### ***Sending a Fax from OpenOffice.org Writer with the FaxBroadcast feature***

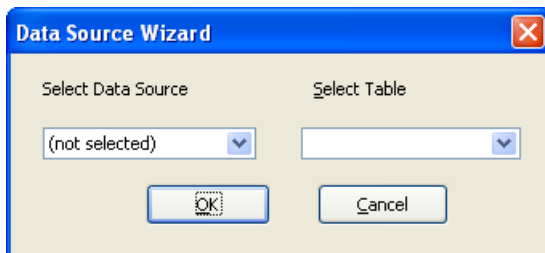
---

Before starting, exit SendFAX if it is running.

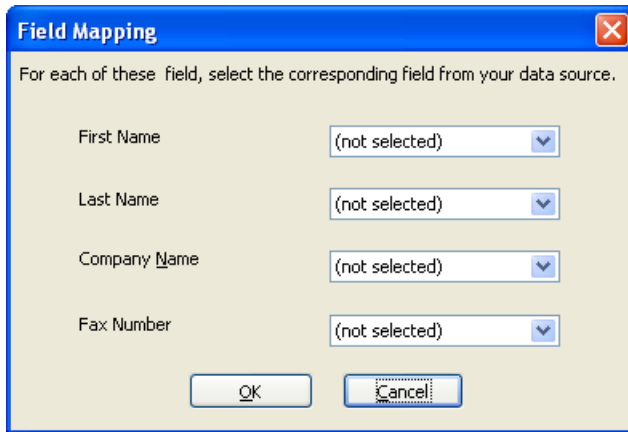
A starting document must have been previously created with the Mail Merge feature in OpenOffice.org Writer. This document will be the fax used for the broadcast sending. For more information, refer to [Creating a Starting Document in OpenOffice.org Writer](#) on page 46.

To send a fax with the FaxBroadcast feature in OpenOffice.org Writer:

1. Open a starting document in OpenOffice.org Writer.
2. Select **Fax > FaxBroadcast**.  
The **Data Source Wizard** dialog box opens.



3. Select the same data source as the one used for creating the starting document, through the **Select Data Source** and **Select Table** dropdown lists, then click **OK**.  
The **Field Mapping** window opens.



- Map the XMediusFAX fields to the corresponding ones of your data source.

**Note:** This step is necessary for the fax to be sent correctly. For example, if the XMediusFAX **Fax Number** field is mapped to a field that does not contain a fax number, the emission will fail. Therefore, the data source must contain a column with all the fax numbers of the recipients. This is the minimum information required for broadcasting a fax.

- Click **OK**.

SendFAX is launched and you are prompted to log on. The fax is displayed in SendFAX with the first record in the data source as its recipient. All fax recipients from your data source appear in the list of fax recipients.

- You can add a cover sheet, make an entry to the **Subject** field, and choose not to send a fax to a given recipient.

**Note:** You cannot add other fax recipients or documents to the fax.

- Click **Send**.

All the faxes of the broadcast are sent.

**Note:** The mapping you did to send this document is not saved. Therefore, the next time you fax a starting document, you must map again the XMediusFAX fields to the fields of the data source used in the starting document.

## ***Sending a Fax Using the Microsoft Office Internet Fax Service***

Since their 2003 version, MS Office programs include a built-in Internet Fax Service functionality allowing you to connect directly to a fax service provider that will send the fax for you. As a XMediusFAX user, you can send faxes through XMediusFAX by selecting this feature.

**Note:** To enable this feature, your administrator must have performed some specific configuration.

The following procedure shows how to use this feature from Microsoft Word, though you can do it from other Office applications such as Excel or PowerPoint.

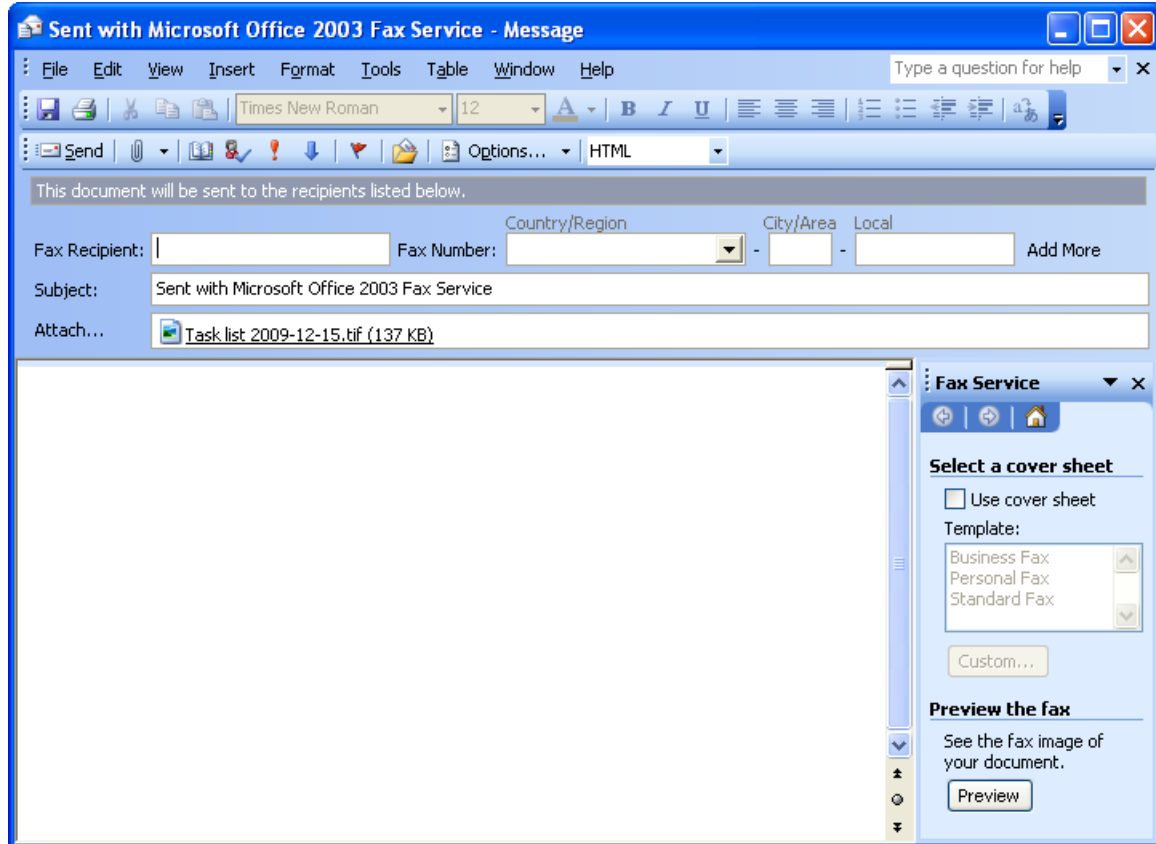
**Note:** Microsoft Outlook must be installed on your computer in all cases.


- Open Microsoft Word.
- Write or open the document that will be sent as fax.
- Select the Internet Fax feature:

Depending on your version of Microsoft Office:

- Office 2003: **File** ► **Send To** ► **Recipient using Internet Fax Service**
- Office 2007: **Office Button** ► **Send** ► **Internet Fax**
- Office 2010: **File** ► **Save & Send** ► **Send Using E-mail** ► **Send as Internet Fax**
- Office 2013: **File** ► **Share** ► **Email** ► **Send as Internet Fax**

The Office Internet Fax Service interface opens. Example:




 **Note:** The original document is now a TIFF image attachment.

4. Address your fax according to the Fax Service feature available fields and options.

Typically, you can enter:


- The name of the **Fax Recipient**
- The **Fax Number**
- A message in the main body field (that will appear on the cover sheet of the fax)

 **Note:** The **Use cover sheet** option available here should remain unchecked (as it is by default): XMediusFAX is configured to add your profile's default cover sheet to the fax. If you check this box, your fax will then have a second and needless cover sheet.

For additional information on the other Office Fax Service feature options, see the Microsoft Office online help.

5. Click **Send**.

The message is sent to be processed as a fax by XMediusFAX using your account and profile information.

 **Note:** The message is also put in your **Sent Items** in Outlook.




## Chapter 7

## Faxing with Email Clients

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### Faxing with Email Clients: Overview

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-  **Note:** Depending on your license, some or all of the Email features described here may be unavailable. Please refer to your administrator.


XMediusFAX allows you to send faxes and receive notifications through your email client, depending on the configuration done by the administrator on the Fax Server.

Depending on the configuration of your email server and on your license, it is also possible to benefit from special features available:

- on Microsoft Outlook (with Exchange and XMediusFAX forms for Outlook)
- on Lotus Notes (with Domino and XMediusFAX composition form for Lotus Notes)


### Faxing with Email Clients Using SMTP

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-  **Note:** Email software that use the SMTP (Simple Mail Transfer Protocol) include products like Microsoft Outlook, Outlook Express, Mozilla ThunderBird, Lotus Notes...

#### Fax Composition

With XMediusFAX, you can send faxes through any email software of this type. This only requires that your administrator installed the XMediusFAX gateway for SMTP.

-  **Note:** This section applies to any email client using SMTP; however, if you are using Microsoft Outlook linked to an Exchange server, you can access some more flexible features, as it is explained in section: [Faxing with Outlook using Exchange and the XMediusFAX Forms](#) on page 60. The same way, if you are using Lotus Notes with the XMediusFAX composition form (available depending on your license), see the section: [Faxing with the XMediusFAX Form for Lotus Notes](#) on page 68.

#### Fax Reception


Finally, if your XMediusFAX account was set for it, you can manage your incoming faxes and your notifications for outgoing faxes directly in your email client (see [Receiving Faxes and Notifications](#) on page 52).

### Sending a Fax with an Email Client Using SMTP

---

To send a fax with your email client:

1. Create a new email.
2. Enter a subject and type the message, as you would do for an email. They will be displayed on the cover sheet of your fax.


 **Note:** Plain text and HTML formats are supported in the message body for outgoing faxes. XMEdiusFAX supports embedded images in HTML message body.

3. If needed, add attachments that will constitute the pages of the fax.
4. In the recipients field (**To**), enter the fax number with the following syntax:

```
fax=fax_number@domain_name
```


where:

- *fax\_number* is the full fax number of the recipient to which you are addressing a fax.
- *domain\_name* is the domain name used to redirect the message to the fax server of your company.

 **Note:** Your administrator should provide this domain name.


For example:

```
fax=5141234567@fax.com
```

 **Note:** To know how to manage the content of the recipients field for more complex combinations, see [Managing Recipients](#) on page 56.

5. If needed, you can change the cover sheet, the sender information and the fax options for the fax being sent (see [Changing the Cover Sheet](#) on page 53 and [Changing Sender Information and Fax Options](#) on page 53).
6. Send the fax as you would do for an email.

The fax is sent and you should receive by email a notification of fax sent if your XMEdiusFAX account is configured to do so.

 **Note:** For more information on managing notifications with your email client, see [Receiving Faxes and Notifications](#) on page 52.

## ***Receiving Faxes and Notifications***

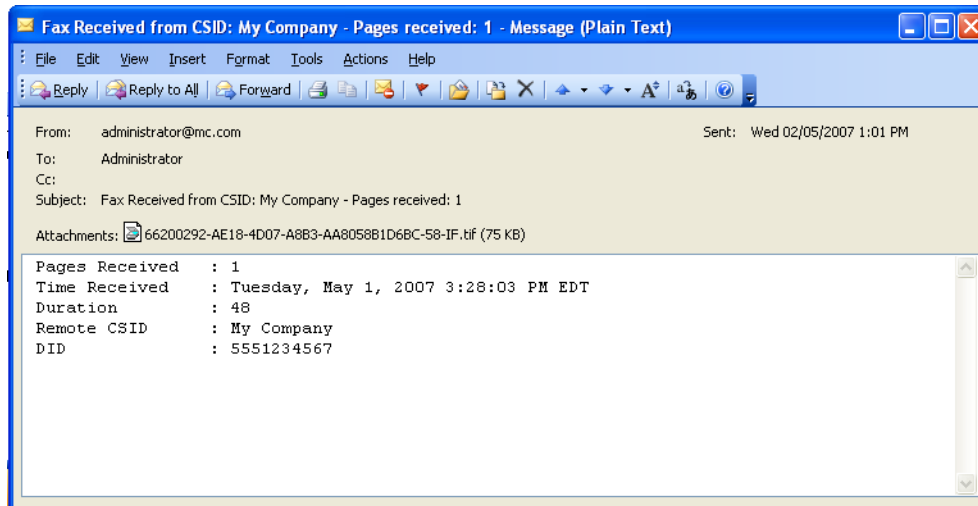
---

If your XMEdiusFAX account was set for it, you should receive your incoming faxes and your notifications for outgoing faxes directly by email in your email client.

 **Note:** If you configured your e-mail client with a **Reply To** address (another e-mail address than the one used to send faxes), all your outbound fax notifications will be sent to that address.

All these notifications will appear like email messages with attachments. For example:





**Note:** The attachments you receive with the email notifications have the `.tif` or `.pdf` extension.

You can also display a list of your incoming and outgoing faxes using a Web browser (see [Overview](#) on page 89).

## Changing the Cover Sheet

---

When your fax is being sent, the default cover sheet used depends on your XMediusFAX profile. However, if you have enough rights, you can replace it by your own cover sheet or by another one available on the Fax Server.

- If you wish to use a cover sheet located on your computer, you just need to attach it to the message being sent, as any other attachment.

**Note:** The file extension is: `.cse`. Cover sheets can be created or modified with the Cover Sheet Editor (see [Overview](#) on page 75).

- If you wish to use a different cover sheet that is available on the Fax Server, you must insert a body code to the body of the message being sent (see [Changing Sender Information and Fax Options](#) on page 53).

## Changing Sender Information and Fax Options

---

Typically:

- Sender Information is information about the sender (name, company...) you wish to display on the cover sheet of the fax.
- Fax Options define the way you wish to send the fax and receive notifications.

When your fax is being sent, sender information and fax options are retrieved from your XMediusFAX account. However, you can override or complete them – if you have enough rights for this – by using body codes inserted in the body of the message.


**Note:** All these changes will be applied only for the current fax and will not affect the data that are stored in your XMediusFAX account and profile on the Fax Server.

Once you send your fax, the entered body codes are interpreted by the Fax Server to include the modified information, and they disappear from the message body.

## The Body Codes Syntax

The body codes must be entered with the following syntax:

```
@@body_code=value
```

-  **Note:** If the *value* term contains spaces or the < character, or if it is composed by Unicode characters, you must enter the whole string between double quotes, in order for all characters of the value to be correctly interpreted by the system. For example, if the city is Montreal, you can write @@sendercity=Montreal, but if the city is New York, you must write @@sendercity="New York".

## Body Codes for Sender Information

The available body codes for sender information are the following:

Body Code	Description
@@csid	Specifies your Call Station ID.
@@senderaddress	Specifies your address.
@@senderbillingcode	Specifies your billing code.
@@sendercellular	Specifies your cellular phone number.
@@sendercity	Specifies your city.
@@sendercompany	Specifies the name of your company.
@@sendercountry	Specifies your country.
@@sendere-mail	Specifies your e-mail address.
@@senderfax	Specifies your fax number.
@@senderfirstname	Specifies your first name.
@@senderlastname	Specifies your last name.
@@senderpager	Specifies your pager number.
@@senderphone	Specifies your telephone number.
@@sendersalutation	Specifies a salutation like Mr. Ms. or prof.
@@senderstate	Specifies your state or province.
@@sendersubbillingcode	Specifies your sub billing code.
@@sendertitle	Specifies your title.
@@senderzipcode	Specifies your postal code.

## About Body Codes and Atomic Groups

Some body codes are part of what we call “atomic groups”. There are only two atomic groups of body codes:


- The **address information** atomic group is composed of:
  - @@sendercompany
  - @@senderaddress
  - @@sendercity
  - @@senderstate
  - @@sendercountry

- @@senderzipcode
- The **phone information** atomic group is composed of:
  - @@senderphone
  - @@senderfax

If even only one property of a group is specified with a body code, then all properties from this group are taken from the message body, and not from your XMediusFAX account. Therefore, missing properties are replaced with empty strings.





For example, if @@sendercompany=*company\_name* is included in the message body, then none of the other elements that are part of the **address information** atomic group will be taken from your XMediusFAX account. If their corresponding body codes are not present in the message, their values will be empty.




On the contrary, if none of the elements of an atomic group are specified in the message body, then the values specified in your XMediusFAX account will be used.

 **Note:** All the other body codes are not part of any atomic group. Therefore, their inclusion in the message body does not have any impact on other properties.

### Body Codes for Fax Options

The available body codes for fax options are the following:

Body Code	Description	Accepted Values
@@coversheetname	Specifies the XMediusFAX cover sheet you wish to use.  <b>Important:</b> This cover sheet must be one of the additional cover sheets allowed for your Profile (if there are any).  <b>Restriction:</b> The default cover sheet of your Profile will not be accepted here; if you wish to use it, just do not insert this body code.	None, or <i>cs_name.cse</i>
@@delayuntil	Enables a delay for sending the current fax and specifies the date and time for this delay.	Any date/time value formatted: YYYY-MM-DDThh:mm:ss
@@notifybroadcast	Indicates whether you are to be notified by email for a broadcast transmission (summary of all communications).  <b>Note:</b> Enabling this type of notification does not suspend the other outgoing fax notifications. If you are using the @@notifysuccess and @@notifyfailed body codes, you will still receive notifications for all the fax communications inside the broadcast.	Yes or No
@@notifyfailed	Indicates whether you are to be notified by email if the transmission fails.	Yes or No
@@notifypreview	Indicates whether you are to receive a preview of the fax by email before sending it.  <b>Note:</b> If this parameter is used when you send the fax, you will receive a preview of the fax by email, but the fax will not be sent to the recipient(s). To really send the fax to the indicated recipient(s) after you receive the preview, you	Yes or No

Body Code	Description	Accepted Values
	must remove this parameter and send the fax again (you must re-open your original fax from the sent items folder).	
@@notifysuccess	Indicates whether you are to be notified by email if the transmission is successful.	Yes or No
@@resolution	Specifies the standard resolution at which the fax attachments will be sent.  <b>Note:</b> The maximum available resolution value is set by the administrator.	Low, High, Fine or Ultrafine
@@sendpriority	Specifies the fax priority.	High, Normal, or Low
@@sendretries	Specifies the number of retries to perform (when an error occurs, such as a busy signal).  <b>Note:</b> You cannot exceed the maximum number of retries specified by the administrator.	1 to 99
@@usebody	Specifies if the message body should be sent with the fax.  <b>Note:</b> This parameter overrides any profile restriction.	Yes or No

### Body Code for Authentication

If the administrator has set your XMediusFAX account for SMTP authentication, you will need to enter your password in the message body by using the @@password bodycode.

 **Note:** Please contact your administrator to know your faxing rights.

For example: @@password=MyPw1234


## Managing Recipients

---

When you are composing a fax with your email client, you may need to know how to manage adequately the information you are going to enter in the recipients field. This section helps you to do it.

### Adding a DTMF Code (Extension Number or Long-Distance Code)

If you need to add a DTMF code (such as an extension number or a long-distance code), you can enter it after the fax number, preceded with one or several pauses (letter p – not case sensitive).

 **Restriction:** The comma, generally used for inserting a pause in most environments, is not supported here.

For example:

```
fax=5141234567p9876@fax.com
```

### Adding Recipient Information

You can add recipient information and associate it to the entered fax number, by using a dedicated syntax. For more details, see [Adding Recipient Information](#) on page 57.

## Adding More Recipients

It is possible to add more than one recipient to your fax:

- To enter manually several recipients, you must separate them with a semi-colon. For example:  

```
fax=5141234567@fax.com; fax=5149876543@fax.com
```
- You can also add real email addresses if you wish to send the same message by email to other recipients. For example:  


```
fax=5141234567@fax.com; jsmith@hiscompany.com
```
- Finally, you can add recipients from the address book of the email client. For more details, see [Adding Recipients from the Email Address Book](#) on page 59.

## Adding Recipient Information

---

XMediusFAX offers a means of adding information about recipients when sending faxes through email clients. This information (for example, the name, the company, the job title...) can be useful for two reasons:

- It can appear on the cover sheet of the fax.
- It is stored with the fax in the XMediusFAX database.

 **Note:** Adding recipient information is optional. Only the fax number is mandatory when you are sending the fax.

## Adding the Recipient Name Only


If you need to add only the recipient name, you can simply enter it by using the following smtp syntax:

```
"recipient_name"<fax=fax_number@domain_name>
```

For example:

```
"John Smith"<fax=5141234567@fax.com>
```

As result, all the words between the quotes will be considered by the system as the first name of the recipient, and the fax will be addressed according to the email address between the brackets < >.

 **Note:** In this syntax, the double quotes define what is called the Display Name of the email address. Depending on your email client, you may be able to access the Display Name value again by double-click or right-click (email properties), if you wish to modify it once the email address has been resolved in the recipient field.


## Adding Other Recipient Information

In general, the additional information is inserted through variables directly in the email address (for a given recipient), using the following syntax:

```
fax=fax_number/variable_name=value/variable_name=value@domain_name
```


The rules are the following:

- The additional variables must be entered immediately after the fax number and before the domain name.
- Each additional variable must be preceded by a slash (/).
- The value of each variable must be indicated after the variable name, with an equal sign (=).

 **Important:** All recipient information values entered directly in the email address must only contain basic ASCII characters. International/special characters (such as accented letters or non-latin characters) are not allowed in these values. However, a solution exists: see [Recipient Information Containing International Characters](#) on page 58.

For example:

```
fax=5141234567/fn=John/ln=Smith/jobtitle=Manager@fax.com
```

 **Note:** The first name and last name can be entered using this syntax. However, you can also mix the syntaxes to enter the name as simple Display Name:

```
"John Smith"<fax=5141234567/jobtitle=Manager@fax.com>
```

### Recipient Information Containing International Characters

If the recipient information contain international character (more generally, any character that is not part of the basic ASCII characters set), you must enter them in the Display Name of the recipient, instead of entering them directly in the email address, where these characters are not allowed.


Here are examples built according to the allowed syntaxes:

- If you wish to indicate only the recipient name:

```
"François Légaré"<fax=5141234567@fax.com>
```

- If you wish to indicate the recipient name and other recipient information:

```
"/fn=François/ln=Légaré/jobtitle=Président"<fax=5141234567@fax.com>
```

 **Note:** Even if it is not recommended, it may happen that you define information in both the Display Name and the email address. In case of conflict (same variable defined in both with a different value), the value will be taken from the Display Name to override the one from the email address.

For example:

- **Display Name:** /fn=François/ln=Légaré/city=Montréal
- **Email address:** fax=5141234567/co=MyCompany/city=NewYork@fax.com

In that case, the system will use the information `fn=François`, `ln=Légaré`, `co=MyCompany` and `city=Montréal`.


### Available Recipient Variables

All the variables available for adding recipient information are listed in the following table. Each of them corresponds to a cover sheet placeholder, which is also indicated.

Variable	Example	Cover Sheet Placeholder
address	address=123 Maple Street	<i>Street</i>
bc, or billingcode	bc=Account 9876	<i>Billing code</i>
cellular	cellular=5149876543	<i>Cellular</i>
city	city=Montreal	<i>City</i>
co, or company	co=My Company	<i>Company</i>
country	country=Canada	<i>Country</i>
dear,	dear=Mr.	<i>Dear</i>
email	email=jsmith@mycompany.com	<i>e-mail address</i>
fn, or first, or firstname	fn=John	<i>First name</i>
ln, or last, or lastname	ln=Smith	<i>Last name</i>
jobtitle	jobtitle=President	<i>Title</i>

Variable	Example	Cover Sheet Placeholder
phone	phone=5149876542	<i>Phone</i>
pager	pager=5149876541	<i>Pager</i>
state	state=Quebec	<i>State</i>
sbc, or subbillingcode	sbc=6543	<i>Sub billing code</i>
zipcode	zipcode=H1J 2K3	<i>Zip code</i>

The entered variables must correspond to placeholders of the cover sheet you are using. For example, if you enter the `Cellular` variable while the cover sheet template does not contain the corresponding placeholder, the cellphone number of the recipient will not appear on the cover sheet. However, the information will be recorded with the fax in the XMediusFAX database.

 **Note:** If you wish to create your own cover sheets or modify existing ones, please refer to the concerned chapter ([Overview](#) on page 75).


### ***Adding Recipients from the Email Address Book***

---

#### **Specific Contacts**

If you wish to use your email client address book to add recipients to your faxes, you must create specific additional contacts whose default email address is built according to the same syntax as for manual addressing (see [Sending a Fax with an Email Client Using SMTP](#) on page 51):

```
fax=fax_number@domain_name
```

 **Note:** Remember that `domain_name` refers to the domain used to redirect the faxes to the Fax Server of your company. Therefore, all the contacts of your address book used to send faxes should have an email address ending with the same term.

For example:


Contact 1	fax=5141234567@fax.com
Contact 2	fax=4189876543@fax.com
Contact 3	fax=4506549630@fax.com

#### **Email and Fax: Two Contacts**

If you wish to have an email address and a fax number for the same person, you must create two separate contacts and identify them according to their type.

For example:

Contact 1	John Smith (email)	jsmith@hiscompany.com
Contact 2	John Smith (fax)	fax=5141234567@fax.com

 **Note:** It is possible to add email recipients and fax recipients to the same fax from the address book.

## Recipient Information

Recipient information cannot be taken from the usual information fields of your address book, except the content of the Display Name of the contact, which will be automatically interpreted by the system as the first name of the recipient.

However, you can indicate any recipient information within the email address by using the same syntax as for manual addressing (see [Adding Recipient Information](#) on page 57).

Then, the default email address field of the contact can contain for example:

```
fax=5141234567/fn=John/ln=Smith/jobtitle=Manager@fax.com
```

**Important:** All recipient information values entered directly in the email address must only contain basic ASCII characters. International/special characters (such as accented letters or non-latin characters) are not allowed in these values. However, a solution exists: see [Recipient Information Containing International Characters](#) on page 58.

## Faxing with Outlook using Exchange and the XMediusFAX Forms

If you are using SMTP, the fax management with Outlook is the same as with any other email client (see [Faxing with Email Clients Using SMTP](#) on page 51). However, if your Outlook is connected to a Microsoft Exchange server and if your administrator configured the Exchange server for this, another protocol (MAPI) can be used for a better management of your faxes.

### Fax Composition



Additionally, some tools are available to make easier the fax composition: if they are installed, you can use XMediusFAX forms for Outlook, or even the SendFax software. Also, the XMediusFAX add-in for Outlook gives you a quick access to these composition tools.

### Fax Reception

XMediusFAX forms for Outlook include a fax composition form, but also a preview form, and notification forms for a better display of your received fax notifications (outgoing and incoming faxes; see [Receiving Faxes and Notifications with Outlook](#) on page 62).

## Using the XMediusFAX Add-In for Outlook

If your administrator installed the XMediusFAX add-in for MS Outlook, you should see a new button in the MS Outlook interface:

with MS Outlook 2007 (or previous versions):		in the toolbar.
with MS Outlook 2010 (or more recent versions):		under the <b>Fax</b> tab of the Outlook ribbon.

This button gives a quick access to the interface with which you usually compose your faxes.

The fax composition interface that opens by clicking this button depends on the tools to which your administrator gave you access. It can be (by decreasing priority):

1. The SendFax interface (if SendFax was installed on your computer)
2. The XMediusFAX composition form for Outlook (if the forms were published by the administrator and SendFax was not installed)



3. The usual email composition interface of Outlook (if none of the two previous tools were installed)

- 👉 **Note:** For more information on how to compose faxes with SendFax, see [Overview](#) on page 3. For more information on how to compose faxes with MS Outlook (with or without the forms), see [Sending a Fax with Outlook Connected to an Exchange Server](#) on page 61.

## ***Sending a Fax with Outlook Connected to an Exchange Server***

---

- 👉 **Tip:** If the Outlook add-in is installed, you can click the corresponding button to access directly your usual fax composition interface (classic email or fax form). See [Using the XMediusFAX Add-In for Outlook](#) on page 60 for more details.

### **Starting Without the Forms for Outlook**

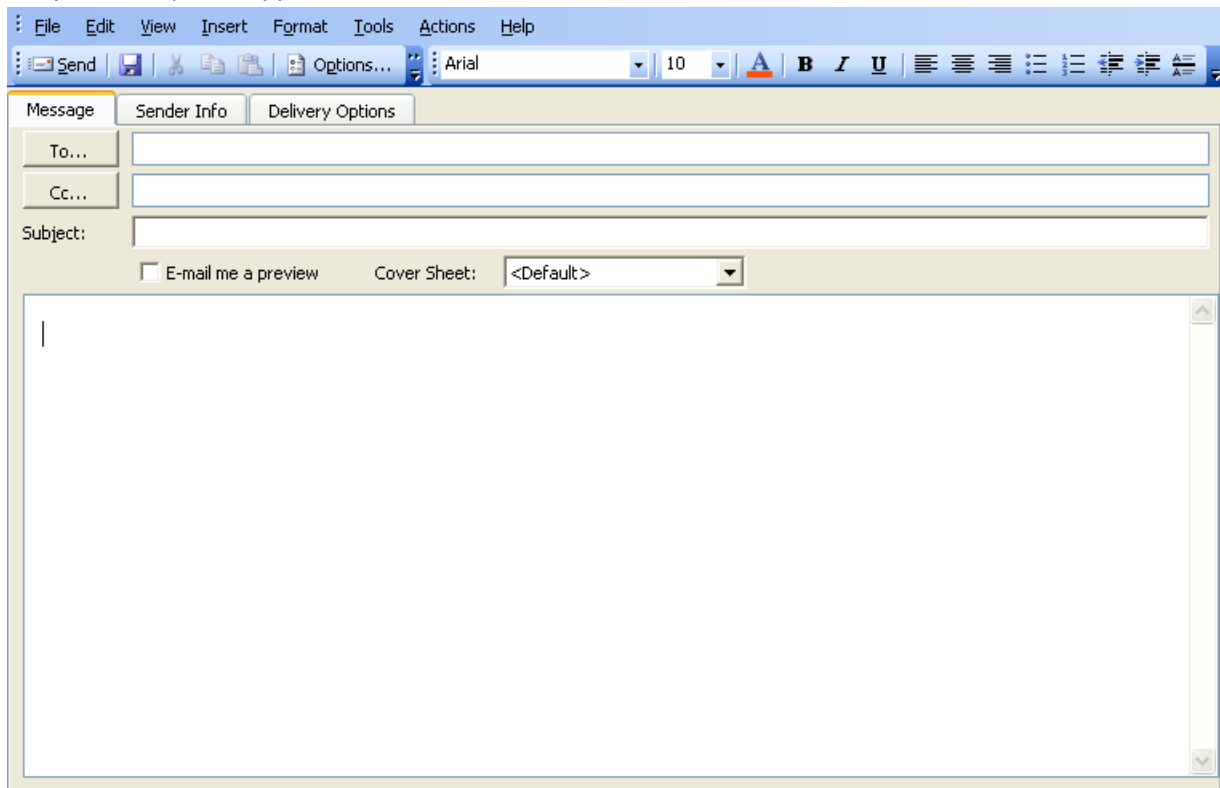
You can compose a fax as if it was a classic email, but the addressing must follow the syntax given in section: [Fax Addressing Syntax for Outlook](#) on page 62.

### **Starting With the Forms for Outlook**


If your administrator installed the XMediusFAX forms for Outlook, you can access a dedicated interface (instead of the classic email composition interface) by selecting:

- For Outlook 2007 (and previous versions): **Tools** ► **Form** ► **Choose Form**
- Since Outlook 2010: **Home** ► **New Items** ► **More Items** ► **Choose Form**

The form to open is called **Composition**, in the **Organizational Forms Library** (library selected in the **Look in** dropdown list), and appears as follows:



Then, you can compose your fax.

 **Note:** The addressing must follow the syntax given in the following section.


### Fax Addressing Syntax for Outlook

With or without the use of forms for Outlook, preparing a fax is still the same as by using any other email client. The only – and important – difference resides on the syntax used to address the fax in the recipients field (**To**), which is the following:

```
[FAX:fax_number]
```



For example:

```
[FAX:5141234567]
```

 **Note:** The square brackets are mandatory.

### Optional Faxing Features

As for any fax sent with an email client, you can (with or without the forms):

- Enter a subject and a message.
  -  **Note:** Plain text, RTF and HTML formats are supported in the message body for outgoing faxes. XMediusFAX supports embedded images in RTF message body as in HTML message body.
- Attach documents that will constitute the fax pages.
- Add more complex entries in the recipients field (see [Managing Recipients with Outlook](#) on page 65).
- Change the cover sheet, the sender information and the fax options.
  -  **Note:** If you are using the forms for Outlook, you can benefit of specific interfaces for this (see [Changing Cover Sheet, Sender Information and Fax Options with Outlook](#) on page 63). If not, you will need to refer to sections: [Changing the Cover Sheet](#) on page 53 and [Changing Sender Information and Fax Options](#) on page 53.

### Authentication

If the administrator has set your XMediusFAX account for SMTP authentication, you will need to enter your password in the message body by using the @@password body code (see [Changing Sender Information and Fax Options](#) on page 53).

 **Note:** Please contact your administrator to know your faxing rights.

## Receiving Faxes and Notifications with Outlook

---

### Without the Forms for Outlook

If the XMediusFAX forms for Outlook are not installed, your received faxes and the notifications for your sent faxes will be displayed in the classic email interface, as for any email client using SMTP (see [Receiving Faxes and Notifications](#) on page 52).

### With the Forms for Outlook

If your administrator installed the XMediusFAX forms for Outlook, your received faxes and the notifications for your sent faxes will be displayed in forms that are especially designed for this purpose.






- 👉 **Note:** If you configured Outlook with a **Reply To** address (another e-mail address than the one used to send faxes), all your outbound fax notifications will be sent to that address.

For each type and status of the notifications you receive, the form is different, because of the nature of information to display. Therefore, you may receive notifications with the following forms:

- Notification Incoming Failed
- Notification Incoming Success
- Notification Outgoing Failed
- Notification Outgoing Success
- Notification Broadcast
- Preview (when you receive a preview before sending the fax for real; see [Receiving a Preview](#) on page 64).

- 👉 **Note:** Each of these forms contain tabs in which you can see information about the fax and the communication.

Also, when you receive a fax or a notification, a specific icon will distinguish its status in the list amongst all your other emails (if the administrator activated the feature for your XMediusFAX account):

Icon	Notification
	Incoming fax that succeeded
	Incoming fax that failed
	Outgoing fax that succeeded (or broadcast summary)
	Outgoing fax that failed
	Fax preview

## ***Changing Cover Sheet, Sender Information and Fax Options with Outlook***

Typically:

- Sender Information is information about the sender (name, company...) you wish to display on the cover sheet of the fax.
- Fax Options define the way you wish to send the fax and receive notifications.

If you have enough rights for it, you can change your cover sheet, your sender information and the fax options in order to override your default ones (or complete them) for the fax being sent.

- 👉 **Note:** All these changes will be applied only for the fax you are sending and will not affect the data that are stored in your XMediusFAX account and profile on the Fax Server.

### **Without the Forms for Outlook**

All these features must be managed as for any other email client using SMTP (see [Changing the Cover Sheet](#) on page 53 and [Changing Sender Information and Fax Options](#) on page 53). Therefore, the following sections do not apply to this case.

### **With the Forms for Outlook**

If your administrator installed the XMediusFAX forms for Outlook, you can access the available tabs of the composition form to perform the same changes (see the following sections).

## Changing the Cover Sheet

In the **Message** tab (see [Starting With the Forms for Outlook](#) on page 61), you can select one of the available cover sheets of the Fax Server in the **Cover Sheet** dropdown list. If you leave <Default>, the default cover sheet associated to your profile will be used.

- 👉 **Note:** Still, you can override the selected cover sheet for your own one by adding a .cse file to the attachments of the message (if you have enough rights).

## Receiving a Preview

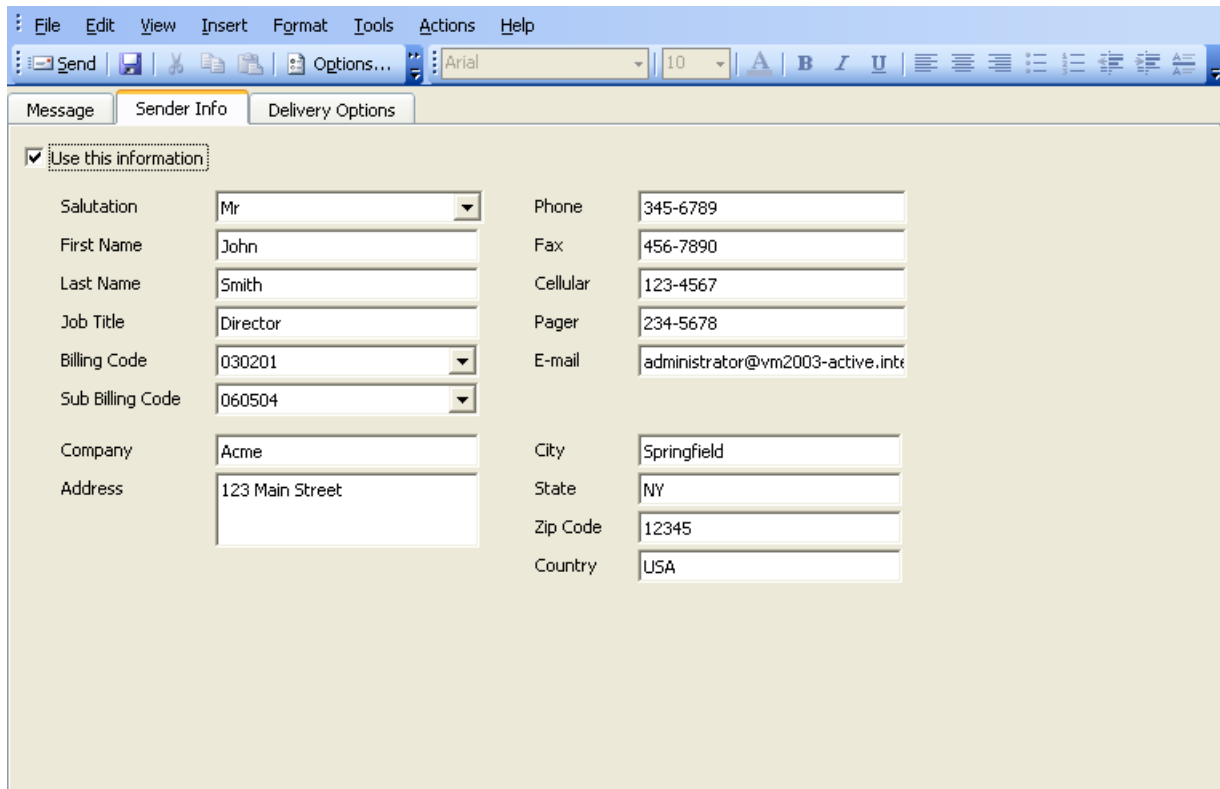
Also in the **Message** tab, you can check the **E-mail me a preview** box in order to receive a preview of your fax.

- 👉 **Note:** If this box is checked when you send the fax, you will receive a preview of the fax by email, but the fax will not be sent to the recipient(s). To really send the fax to the indicated recipient(s) after you receive the preview, you must uncheck this box and send the fax again (to allow it, the email client cloned and re-opened your original fax).

## Changing the Sender Information

The **Sender Information** tab allows you to change your default personal information. You just need to check the **Use this information** box and change the values of the fields.


- 👉 **Note:** By default, this box is unchecked, and the information is retrieved from your account on the Fax Server.

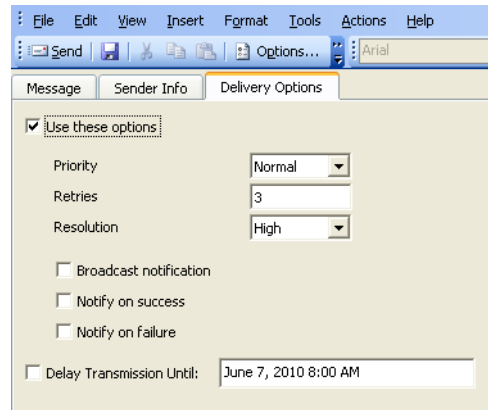


Sender Info	
<input checked="" type="checkbox"/> Use this information	
Salutation	Mr
First Name	John
Last Name	Smith
Job Title	Director
Billing Code	030201
Sub Billing Code	060504
Company	Acme
Address	123 Main Street
Phone	345-6789
Fax	456-7890
Cellular	123-4567
Pager	234-5678
E-mail	administrator@vm2003-active.inte
City	Springfield
State	NY
Zip Code	12345
Country	USA




## Changing the Fax Options

The **Delivery Options** tab allows you to change the fax options. You just need to check the **Use these options** box and change the options below.

 **Note:** By default, this box is unchecked, and the settings are retrieved from your profile on the Fax Server.



Here is the description of the available options:


Option	Description
<b>Priority</b>	Specifies the fax priority.
<b>Retries</b>	Specifies the number of retries to perform (when an error occurs, such as a busy signal).  <b>Note:</b> You cannot exceed the maximum number of retries specified by the administrator.
<b>Resolution</b>	Specifies the standard resolution at which the fax attachments will be sent.  <b>Note:</b> The maximum available Resolution value is set by the administrator.
<b>Notify on Success</b>	Indicates whether you are to be notified by email if the transmission is successful.
<b>Notify on Failure</b>	Indicates whether you are to be notified by email if the transmission fails.
<b>Broadcast Notification</b>	Indicates whether you are to be notified by email for a broadcast transmission (summary of all communications).  <b>Note:</b> Enabling this type of notification does not suspend the other outgoing fax notifications. If you leave the <b>Notify on success</b> and <b>Notify on failure</b> boxes checked, you will still receive notifications for all the fax communications inside the broadcast.
<b>Delay Transmission Until:</b>	Enables a delay for sending the current fax and specifies the date and time for this delay.

## *Managing Recipients with Outlook*

When you are composing a fax with Outlook, you may need to know how to manage adequately the information you are going to enter in the recipients field. This section helps you to do it.

### Adding a DTMF Code (Extension Number or Long-Distance Code)

If you need to add a DTMF code (such as an extension number or a long-distance code), you can enter it after the fax number, preceded with one or several pauses (letter `p` – not case sensitive).

 **Restriction:** The comma, generally used for inserting a pause in most environments, is not supported here.

For example:

```
[FAX:5141234567p9876]
```

### Adding Recipient Information

You can add recipient information and associate it to the entered fax number, by using a dedicated syntax. For more details, see [Adding Recipient Information with Outlook](#) on page 66.

### Adding More Recipients

It is possible to add more than one recipient to your fax:


- To enter manually several recipients, you must separate them with a semi-colon. For example:  

```
[FAX:5141234567]; [FAX:5149876543]
```
- You can also add real email addresses if you wish to send the same message by email to other recipients. For example:  

```
[FAX:5141234567]; jsmith@hiscompany.com
```
- Finally, you can add recipients from the Outlook address book. For more details, see [Adding Recipients from the Outlook Address Book](#) on page 68.

### Adding Recipient Information with Outlook


As with other email clients, it is possible to add recipient information to the fax number of a given recipient, in order to make them accessible for the Fax Server and possibly the cover sheet of the fax. The usable recipient variables are the same as for SMTP, but the general syntax is a bit different.

 **Note:** Adding recipient information is optional. Only the fax number is mandatory when you are sending the fax.

### Adding the Recipient Name Only

If you need to add only the recipient name, you can simply enter it by using the following syntax:

```
[Fax:recipient_name@fax_number]
```

 **Note:** Everything that is put between the `Fax:` word and the `@` sign is considered as the first name of the recipient. The `@` sign is mandatory when the recipient's name is specified.

For example:

```
[Fax:John Smith@5141234567]
```


### Adding Other Recipient Information

If you need to add for a given recipient more information than its name, you must use the following syntax:

```
[Fax:/variable_name=value/variable_name=value@fax_number]
```

The rules are the following:

- All variables must be entered between the `Fax:` word and the `@` sign.
- Each variable must be preceded by a slash (`/`), even the first one.
- The value of each variable must be indicated after the variable name, with an equal sign (`=`).

 **Important:** If you insert the recipient name with other information, you must indicate it with its corresponding variable; the case described in the previous section ([Adding the Recipient Name Only](#) on page 66) is no more applicable.

For example:


```
[Fax:/fn=John/ln=Smith/jobtitle=Manager@5141234567]
```

### Available Recipient Variables

All the variables available for adding recipient information are listed in the following table. Each of them corresponds to a cover sheet placeholder, which is also indicated.

Variable	Example	Cover Sheet Placeholder
address	address=123 Maple Street	<i>Street</i>
bc, or billingcode	bc=Account 9876	<i>Billing code</i>
cellular	cellular=5149876543	<i>Cellular</i>
city	city=Montreal	<i>City</i>
co, or company	co=My Company	<i>Company</i>
country	country=Canada	<i>Country</i>
dear,	dear=Mr.	<i>Dear</i>
email	email=jsmith@mycompany.com	<i>e-mail address</i>
fn, or first , or firstname	fn=John	<i>First name</i>
ln, or last , or laststname	ln=Smith	<i>Last name</i>
jobtitle	jobtitle=President	<i>Title</i>
phone	phone=5149876542	<i>Phone</i>
pager	pager=5149876541	<i>Pager</i>
state	state=Quebec	<i>State</i>
sbc, or subbillingcode	sbc=6543	<i>Sub billing code</i>
zipcode	zipcode=H1J 2K3	<i>Zip code</i>


The entered variables must correspond to placeholders of the cover sheet you are using. For example, if you enter the `Cellular` variable while the cover sheet template does not contain the corresponding placeholder, the cellphone number of the recipient will not appear on the cover sheet. However, the information will be recorded with the fax in the XMediusFAX database.

 **Note:** If you wish to create your own cover sheets or modify existing ones, please refer to the concerned chapter ([Overview](#) on page 75).

### ***Adding Recipients from the Outlook Address Book***

---


You can add to the recipients of your fax any contact of your personal contacts list of the Outlook address book whose E-mail Type is **FAX**. They are considered as fax contacts and will receive automatically the message as a fax.

 **Note:** Within the Outlook Address book, the same contact can have several email address and fax numbers defined. For each of these entries, the contact will appear several times in your personal contacts list – some for emails, of type **SMTP**, others for faxes, of type **FAX**. Therefore, there is no need to create several contacts (emails and faxes) for the same person. Also, note that it is possible to add email recipients and fax recipients to the same fax from the address book.

Depending on your needs, there are two ways to obtain fax contacts:

#### **Using a Fax Field (Fax Number Only)**

If some of your personal contacts have a fax number in one of their fields labelled “Fax” (**Business Fax**, **Home Fax** or **Other Fax**), they will be automatically displayed as fax contacts in the list of available contacts (in your personal contacts list).


 **Note:** In a fax field, no specific syntax is needed for the fax number.

#### **Using an Email Field (Fax Number with Recipient Information)**

Recipient information cannot be retrieved from the information fields of your Outlook contacts. However, It is possible to use one of the email fields of the contact (instead of a fax field) to include recipient information with the fax number.

For this, you must use the same syntax as for manual addressing (see [Adding Recipient Information with Outlook](#) on page 66). Then, the second email field of your contact could contain for example:


```
[Fax:/fn=John/ln=Smith/jobtitle=Manager@5141234567]
```

 **Note:** Once you entered this type of information in the field, the square brackets and the Fax: word disappear. This means that Outlook has well interpreted the email address as a fax information. You can access the properties of the field (and modify its content if needed) by right-clicking on it: the **E-mail Type** should be **FAX**.

## ***Faxing with the XMediusFAX Form for Lotus Notes***

---

The fax management with Lotus Notes is globally the same as for any other email client using SMTP (see [Faxing with Email Clients Using SMTP](#) on page 51). However, the fax composition can be simplified.

 **Note:** Depending on your license, the form for Lotus Notes might not be available.

#### **Fax Composition**

If your administrator configured the Lotus Domino server for this, some specific features can be used to simplify the fax composition through a dedicated form (Fax Memo).

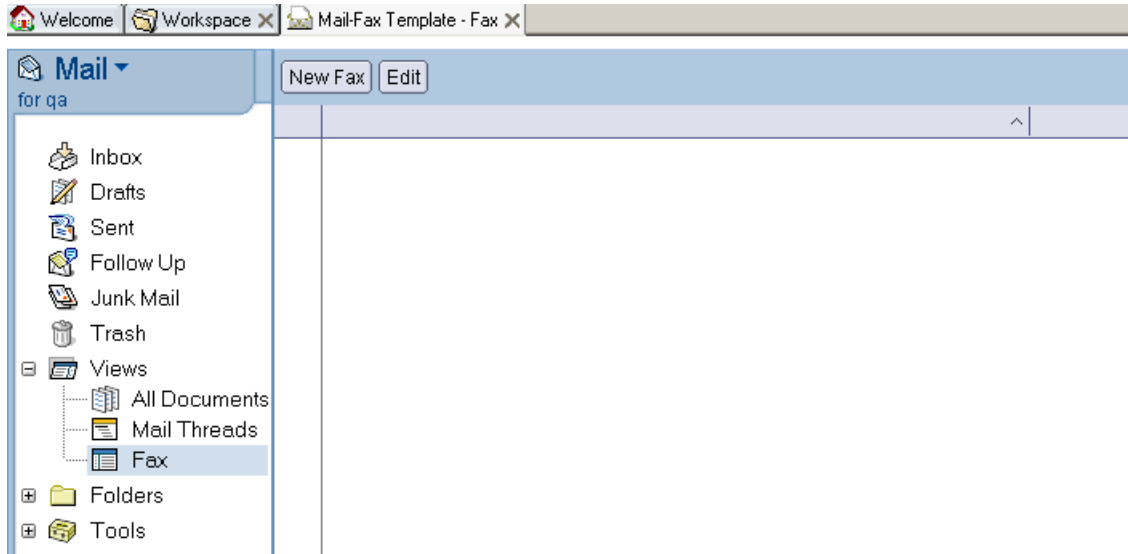
#### **Fax Reception**

For receiving your incoming faxes and notifications for your outgoing faxes, Lotus Notes works as any other email client using SMTP (see [Receiving Faxes and Notifications](#) on page 52).

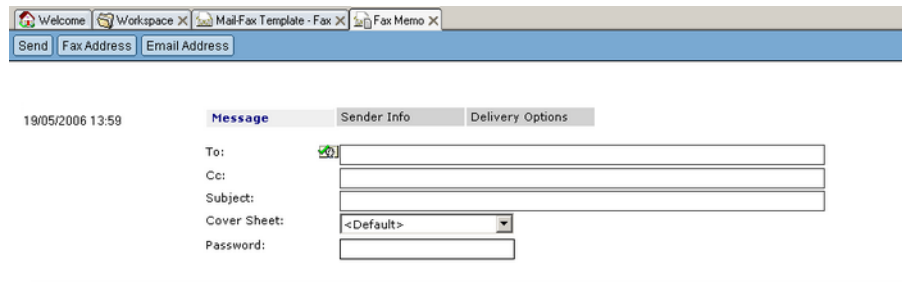


## ***Sending a Fax using the Form for Lotus Notes***

If your administrator installed the XMediusFAX form for Lotus Notes, you can access a dedicated interface (instead of the classic email composition interface) by selecting **Views ► Fax**.



To open the fax composition form, just click the **New Fax** button.



Then, you can compose your fax.

**Note:** The addressing must follow the syntax given in the following section.

### **Fax Addressing Syntax with the Form for Lotus Notes**

With the use of form for Lotus Notes, preparing a fax is still the same as by using any other email client. The only difference is that you can enter the fax number directly in the recipients field (**To**) without following any particular syntax.

For example:

5141234567

### **Optional Faxing Features**

As for any fax sent with an email client, you can:

- Enter a subject and a message.
- Attach documents that will constitute the fax pages.
- Add more complex entries in the recipients field (see [Managing Recipients with Lotus Notes](#) on page 72).

- Change the cover sheet, the sender information and the fax options (see [Changing Cover Sheet, Sender Information and Fax Options with the Form for Lotus Notes](#) on page 70).

### Authentication

If the administrator has set your XMediusFAX account for SMTP authentication, you will need to enter your password in the **Password** field. If not, this field should not appear on the form.

 **Note:** Please contact your administrator to know your faxing rights.


## ***Changing Cover Sheet, Sender Information and Fax Options with the Form for Lotus Notes***

---

Typically:


- Sender Information is information about the sender (name, company...) you wish to display on the cover sheet of the fax.
- Fax Options define the way you wish to send the fax and receive notifications.

If you have enough rights for it, you can change your cover sheet, your sender information and the fax options in order to override your default ones (or complete them) for the fax being sent.

 **Note:** All these changes will be applied only for the fax you are sending and will not affect the data that are stored in your XMediusFAX account and profile on the Fax Server.


### Changing the Cover Sheet

In the **Message** tab (see [Sending a Fax using the Form for Lotus Notes](#) on page 69), you can select one of the available cover sheets of the Fax Server in the **Cover Sheet** dropdown list. If you leave `<Default>`, the default cover sheet associated to your profile will be used.

 **Note:** Still, you can override the selected cover sheet for your own one by adding a `.cse` file to the attachments of the message (if you have enough rights).

### Changing the Sender Information

The **Sender Information** tab allows you to change your default personal information. You just need to check the **Use this information** box and change the values of the fields.

 **Note:** By default, this box is unchecked, and the information is retrieved from your account on the Fax Server.


### Changing the Fax Options

The **Delivery Options** tab allows you to change the fax options. You just need to check the **Use these options** box and change the options below.

**Note:** By default, this box is unchecked, and the settings are retrieved from your profile on the Fax Server.


Here is the description of the available options:

Option	Description
<b>Priority</b>	Specifies the fax priority.
<b>Retries</b>	Specifies the number of retries to perform (when an error occurs, such as a busy signal). <b>Note:</b> You cannot exceed the maximum number of retries specified by the administrator.
<b>Resolution</b>	Specifies the standard resolution at which the fax attachments will be sent. <b>Note:</b> The maximum available Resolution value is set by the administrator.
<b>Notify on Success</b>	Indicates whether you are to be notified by email if the transmission is successful.
<b>Notify on Failure</b>	Indicates whether you are to be notified by email if the transmission fails.

Option	Description
<b>Broadcast Notification</b>	<p>Indicates whether you are to be notified by email for a broadcast transmission (summary of all communications).</p> <p> <b>Note:</b> Enabling this type of notification does not suspend the other outgoing fax notifications. If you leave the <b>Notify on success</b> and <b>Notify on failure</b> boxes checked, you will still receive notifications for all the fax communications inside the broadcast.</p>
<b>Delay Transmission Until:</b>	Enables a delay for sending the current fax and specifies the date and time for this delay.


## Managing Recipients with Lotus Notes

When you are composing a fax with the form for Lotus Notes, you may need to know how to manage adequately the information you are going to enter in the recipients field. This section helps you to do it.

 **Note:** The way to enter fax numbers was simplified especially for the composition form for Lotus Notes. However, when the fax is sent, the syntax that is finally used for the fax numbers is actually the same as for any SMTP client. During the fax composition, you can pre-apply automatically this syntax to the entered fax numbers by using a dedicated button (see [Resolving Fax Numbers](#) on page 73).

### Adding a DTMF Code (Extension Number or Long-Distance Code)

If you need to add a DTMF code (such as an extension number or a long-distance code), you can enter it after the fax number, preceded with one or several pauses (letter `p` – not case sensitive).

 **Restriction:** The comma, generally used for inserting a pause in most environments, is not supported here.

For example:

```
5141234567p9876
```


### Adding Recipient Information

You can add recipient information and associate it to the entered fax number, by using a dedicated syntax, which is exactly the same as for email clients using SMTP (see [Adding Recipient Information](#) on page 57).

However, as for a simple fax number, the form for Lotus Notes allows you to enter the information without having to enter the `fax=` word and the domain name of the Fax Server (with the `@` sign).

For example:

```
5141234567/fn=john/ln=smith
```

 **Important:** All recipient information values entered directly in the email address must only contain basic ASCII characters. International/special characters (such as accented letters or non-latin characters) are not allowed in these values. However, a solution exists: see [Recipient Information Containing International Characters](#) on page 58.

### Adding More Recipients

It is possible to add more than one recipient to your fax:

- To enter manually several recipients, you must separate them with a comma. For example:

```
5141234567, 5149876543
```

- You can also add real email addresses if you wish to send the same message by email to other recipients. For example:

```
5141234567, jsmith@hiscompany.com
```


- Finally, you can add recipients from the Lotus Notes address book. For more details, see [Adding Recipients from the Lotus Notes Address Book](#) on page 73.

### **Resolving Fax Numbers**

---

When the fax is sent, the syntax that is finally used for the fax numbers is actually the same as for any SMTP client:

```
fax=fax_number@domain_name
```

The form will resolve automatically the fax numbers with the correct syntax, including the domain name used for your fax server. To check if the fax number will be correctly resolved, you can use the  button.

For example:

```
5141234567, 5149876543
```

will be resolved into

```
<fax=5141234567@fax.com>, <fax=5149876543@fax.com>
```

### **Adding Recipients from the Lotus Notes Address Book**

---

#### **Adding Fax Recipients**

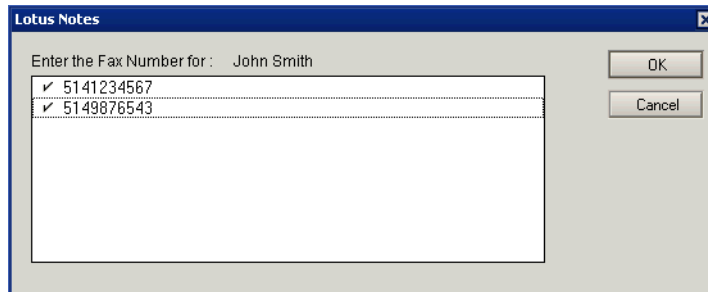
To add fax recipients from the address book, you just need to click the **Fax Address** button and choose the recipients in your list of contacts.


When you validate your recipients selection, the composition form tries to retrieve information in the **Office fax** and **Home fax** fields (fax numbers), but also in the **First** and **Last** fields (names) and the **Company** field of the contact, to build and resolve a recipient entry with the correct syntax. The behavior varies depending on what is found:

- If all the recipients have at least a fax number in the **Office fax** or in the **Home fax** field, all information is resolved in the recipients field of the form.
- If a recipient does not have a fax number, a dialog appears, prompting you to enter a number for this individual.



- If a recipient has multiple fax numbers (Office fax and Home fax), a dialog appears, prompting you to select which number the fax is to be sent to.



 **Note:** You can check or uncheck any of these fax numbers; by default, all of them are selected.


### Adding Fax Recipients with More Information


The form for Lotus Notes does not allow to retrieve more information than the fax number and the first and last name from the address book fields of the contact. However, there are two ways to add more information to a contact:

- You can add this information manually in the recipients field of the form, after having added the contact from the address book.
- You can add this information in the contact interface of the address book: in the fax field, after the fax number. For example, the **Office fax** field of the contact could have the following value:

```
5141234567/jobtitle=Manager
```


When adding the contact from the address book, its job title will be added too.

 **Note:** In both cases, you must follow the syntax presented in section: [Adding Recipient Information](#) on page 57.

 **Important:** All recipient information values entered directly in the email address must only contain basic ASCII characters. International/special characters (such as accented letters or non-latin characters) are not allowed in these values. However, a solution exists: see [Recipient Information Containing International Characters](#) on page 58.

### Adding Email Recipients

It is possible to add email recipients from the address book, if you wish to send the same fax as email to some recipients. For this, you just need to click the **Email Address** button and choose the recipients in your list of contacts.

 **Note:** When you validate, the email address of each recipient is added to the **Cc** field of the form.

## Chapter 8

## Editing Cover Sheets

---


### Overview

---

The Cover Sheet Editor offers the possibility of designing your own cover sheets for XMediusFAX, and of modifying the existing ones provided with the Fax Server.

With the cover sheet editor, it is possible:

- to draw geometric shapes
- to add text and bitmap images
- to add variables that automatically insert such information as sender name and company, etc.
- to create, import, and link to OLE 2.0 (Object Linking and Embedding) compatible objects within the cover sheet editor
- to set several parameters as the resolution, the page format and the locale (language and date/time format).

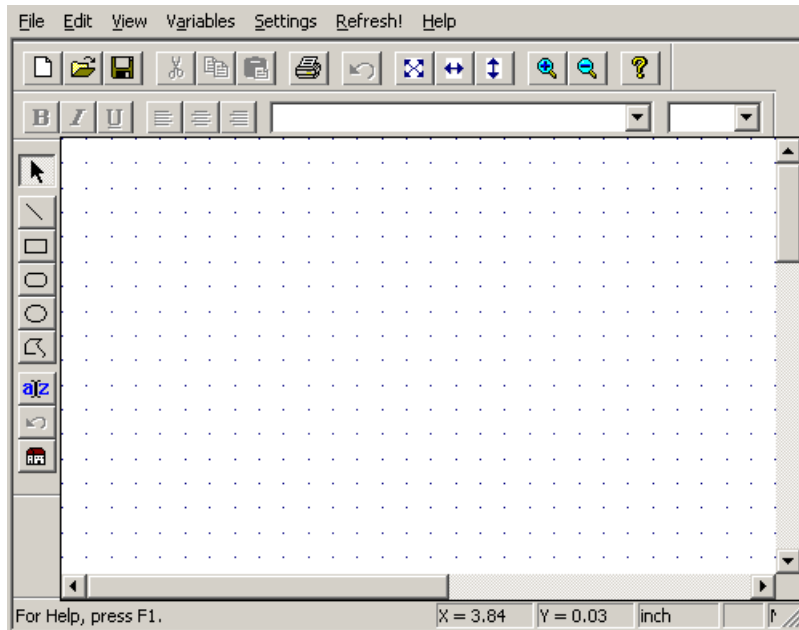
 **Note:** Administrators can decide not to install the cover sheet editor on a user's computer. It is possible therefore that some users cannot access the module.

### Launching the Cover Sheet Editor

---





Among your installed **XMediusFAX** applications, choose **Cover Sheet Editor**.

The cover sheet editor will be displayed, as depicted in the following screenview:







## Menu Bar Details and Associated Icons


### The File Menu

	<b>New</b>	Allows you to create a new cover sheet.
	<b>Open</b>	Opens a previously saved cover sheet.
	<b>Save</b>	Saves the current cover sheet.
	<b>Save As</b>	Saves your current cover sheet under a different name or in a different location.
	<b>Print</b>	Prints the current cover sheet.
	<b>Print Preview</b>	Displays cover sheet as it will look when printed.
	<b>Print Setup</b>	Sets print options.
	<b>Recent File</b>	Displays the filename of recently accessed cover sheet files.
	<b>Exit</b>	Closes the cover sheet editor.

### The Edit menu

	<b>Undo</b>	Erases the last action.
	<b>Cut</b>	Cuts (removes) the selected objects and puts them to the Clipboard, in order to paste them somewhere else.
	<b>Copy</b>	Copies the selected objects to the Clipboard.
	<b>Paste</b>	Pastes the contents of the clipboard to your cover sheet.
	<b>Delete</b>	Deletes selected objects.



	<b>Insert New Object</b>	Lets you create, import and link to graphics, text, spreadsheets, etc., created with other applications (see <a href="#">Embedding and Linking OLE 2.0 Objects</a> on page 82).
	<b>Links</b>	Allows you to edit and update links (only for linked objects; see <a href="#">Managing OLE 2.0 Objects in a Cover Sheet</a> on page 82).
	<b>Object</b>	Lets you manage the selected OLE 2.0 object (see <a href="#">OLE 2.0 compatible objects</a> on page 81).

### The View menu


<b>Toolbars</b>	Displays the main toolbar, the drawing toolbar, and the text attributes toolbar.
<b>Status Bar</b>	Enables or disables the status bar at the bottom of the cover sheet editor window.
<b>Grid</b>	Toggles the display of the grid points on the page.
<b>Zoom Settings</b>	Lets you choose a different magnification setting to view your pages. By default, the page is displayed at 100% (actual size).
<b>Languages</b>	Enables the selection of language.

### The Variables menu

There are three categories of variables used in cover sheets:

- **General**
- **Sender**
- **Recipient**

These variables are automatically filled in by XMediusFAX at the time of your fax transmission.

 **Note:** For more information, see [Cover Sheet Variables](#) on page 78.

### The Settings menu

<b>Page Setup</b>	Lets you chose the page size of the cover sheet (Letter, Legal, A3, B3 or A4) or view the page dimensions by inches, pixels, or millimeters (see <a href="#">Setting the Page Format</a> on page 80).
<b>Locale</b>	Allows you to set the locale which determines the date format and time that appears on the cover sheet (see <a href="#">Setting the Cover Sheet Locale (Language and Date Format)</a> on page 80).

### The Refresh feature

The **Refresh** button of the menu allows to refresh the current display of the cover sheet.

## Creating a Cover Sheet

---

1. Open the cover sheet editor.
2. If needed, adjust the page format and locale settings for the current cover page (see [Setting the Page Format](#) on page 80 and [Setting the Cover Sheet Locale \(Language and Date Format\)](#) on page 80).
3. Add and organize the items you wish to see appearing on the cover sheet:
  - For geometric shapes, bitmaps and variables, see [Adding and Editing Items](#) on page 78.

- For OLE 2.0 compatible objects, see [OLE 2.0 compatible objects](#) on page 81.

4. Choose **Save As** and type the name of your cover sheet.

The .cse extension is automatically applied.

- 👉 **Note:** You can save the cover sheet with a specific resolution. For more information, see [Setting the Cover Sheet Resolution](#) on page 81.








The cover sheet can now be used by the Fax Server.

- 👉 **Note:** Its integration is the responsibility of the administrator (see the *XMediusFAX Administration Guide*).

## Adding and Editing Items

---

It is possible to customize a cover sheet by adding and editing items such as text, lines, shapes and variables through the toolbar:

	Text	Draws a text box on the currently displayed page. Type the text immediately after drawing the box. Text boxes can be resized by clicking them and dragging the handles.
	Line	Draws a line on the page.
	Rectangle or square	Draws a rectangle or square on the page.
	Rectangle or square with rounded corners	Draws a rectangle or square with rounded corners on the page.
	Circle or ellipse	Draws a circle or ellipse on the page
	Variable	<p>Adds a variable on the page. Choose either <b>General</b>, a <b>Sender</b>, or a <b>Recipient</b> variable.</p> <ul style="list-style-type: none"> <li>👉 <b>Note:</b> For more information, see <a href="#">Cover Sheet Variables</a> on page 78.</li> </ul>
	Polygon	<p>Adds a polygon. Click once and move the cursor to the next corner.</p> <ul style="list-style-type: none"> <li>👉 <b>Note:</b> Double-click to cancel a polygon entry.</li> </ul>
	Object	Inserts, creates or links an object to the page. For more information, refer to <a href="#">OLE 2.0 compatible objects</a> on page 81.

## Cover Sheet Variables

---

There are three categories of variables used in cover sheets:

- **General**
- **Sender**
- **Recipient**

These variables are automatically filled in by XMediusFAX at the time of your fax transmission.

### General Variables

General variables include:

- *Time , Date*
- *Number of Pages*
- *Subject*
- *Commentary*
- *API tag , API tag 2*

### Sender Variables

Sender information is defined in the fax sender's Information properties. Sender variables include:

- *Dear, Display Name, First Name, Last Name*
- *Company, Title*
- *Street, City, State, Country, Zip Code*
- *Phone, Fax, Cellular, Pager, e-mail*
- *Billing Code, Sub Billing Code*


### Recipient Variables

Recipient variables, that is, variables concerning the fax recipient, include four categories:

- **Name**
- **Address**
- **Destination**
- **Other**

The following table lists the variables offered in each category. Note that Recipient information is defined in the phone book.

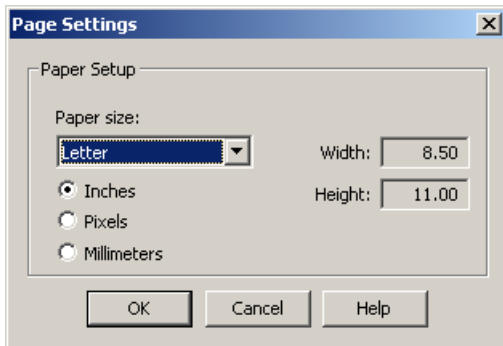
Name	Address	Destination	Other
<i>Dear</i>	<i>Street</i>	<i>Destination</i>	<i>Phone</i>
<i>Name</i>	<i>City</i>	<i>Fax</i>	<i>Extension</i>
<i>Last Name</i>	<i>State</i>	<i>Fax 2</i>	<i>Cellular</i>
<i>First Name</i>	<i>Zip Code</i>	<i>Fax 3</i>	<i>Pager</i>
<i>Company</i>	<i>Country</i>	<i>e-mail</i>	<i>Billing Code</i>
<i>Title</i>		<i>e-mail 2</i>	<i>Sub Billing Code</i>
		<i>e-mail 3</i>	<i>Phone Book Commentary</i>
			<i>User 1</i>
			<i>User 2</i>
			<i>User 3</i>
			<i>User 4</i>

 **Note:** The menu selection **Dear** receives the value entered in the **Salutation** field in the phone book.

## Setting the Page Format

---

To access the page format settings dialog, just select **Settings** ► **Page Setup**.



There, you can change:

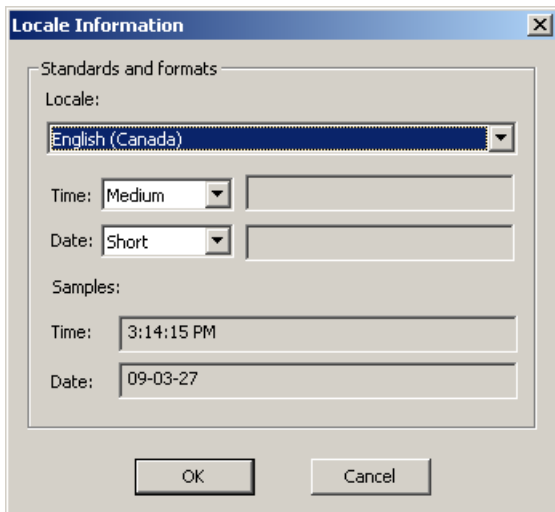
- The page format of your cover sheet, through the **Paper size** dropdown list.
  - 👉 **Note:** The two dimensions of the selected size are displayed in the right of the dialog (in the measurement unit selected below).
- The measurement unit used for the cover page (**Inches**, **Pixels** or **Millimeters**).
  - 👉 **Note:** The cursor's coordinates (in the status bar of the editor) will be displayed in this unit.

## Setting the Cover Sheet Locale (Language and Date Format)

---

You can choose locale settings that will be implemented in the cover sheet definition.

To access the locale settings dialog, select **Settings** ► **Locale**.



There, you can change:

- The language (and country, with its usual locale settings) used for the current cover sheet, in the **Locale** dropdown list.

- The **Time** and **Date** formats you wish to be used by the time and date variables you may have added to your cover sheet.
  - 👉 **Note:** You have access to several predefined formats that you can test by selecting them: the **Samples** section will simulate the real output format with the current date and time.
 

Also, the `custom` format allows you to enter (in the field beside the dropdown list) your own format, built according to the ICU 4.0 syntax (for more details, please refer to the Web page: <http://icu-project.org/apiref/icu4c/classSimpleDateFormat.html>, in the *Detailed Description* section).

## Setting the Cover Sheet Resolution

---

Stand-alone fax machines usually have a lower resolution than laser printers. Your cover sheets may have a slightly coarse appearance when printed by a fax machine.

You can apply a specific resolution to your cover sheet while you save it for the first time (or by selecting **File** ► **Save As** if the file exists already).

There, you can choose a resolution in the **Resolution** dropdown box at the bottom. Available choices are:

- **Low resolution** (200 x 100)
- **High resolution** (200 x 200), selected by default
- **Fine resolution** (300 x 300)
- **Ultra Fine resolution** (400 x 400)

- 👉 **Note:** Once the file is saved, the resolution is embedded in the cover sheet definition. Therefore, if you wish to use a cover sheet with various resolutions, you must save each instance under a different name. However, if you only need to change the resolution of an existing cover sheet, you must use the **Save As** option and overwrite the file by using the same name.

## OLE 2.0 compatible objects

---

Because the cover sheet editor is OLE 2.0 compatible, you can create, embed, or link to any OLE 2.0 compatible object created with a wide variety of third-party applications.

### How it Works

When you create a new object, the application that is used to generate it is launched within the cover sheet editor. An application window allows you to perform the necessary operations and the application's menus, toolbars, and status bar are integrated into the cover sheet editor window. Clicking outside the window, but within the cover sheet, closes the application.

### Examples of Applications

Among many others, objects placed in a cover sheet can be CorelDraw and Corel PhotoPaint graphics, Microsoft Paint graphics, Microsoft PowerPoint slides, Word and WordPerfect documents, etc.

- 👉 **Note:** The application to generate the desired object type must be accessible from the computer running the cover sheet editor.

## ***Embedding and Linking OLE 2.0 Objects***

---

With the Cover Sheet Editor, an OLE 2.0 object can be either embedded (physically) in the cover sheet, or linked to it by indicating the path to the object's physical location.

In both cases, you must click the  button to start adding an object.


### **Adding an Embedded Object**

When an object is embedded, it can be considered like any other item such as text, a geometric shape, a bitmap image or a variable. However, an embedded object can be updated in the cover sheet editor: the original application that was used to create the object is launched within the cover sheet editor.

When the **Insert Object** dialog opens, you have two choices:

- If you want to create an object from scratch and design it directly in the Cover Sheet Editor:
  1. Select the **Create New** option.
  2. Select the type of object you are going to create, then click **OK**.

The application associated to the type of object selected opens, and you can start designing the object.

 **Note:** When your object is finished, you just need to click in the cover sheet, outside the object.

- If you want to embed an object that already exists:

1. Select the **Create from File** option.
2. Browse for the wanted file, then click **OK**.

The object is added (embedded) to the cover sheet.

 **Note:** An embedded object is framed with solid lines.


### **Adding a Linked Object**

When an object is linked, its location path and file name are only referenced from the cover sheet without being physically embedded. Changes made to the linked object – outside the Cover Sheet Editor, using the application that created it – are automatically reflected in the cover sheet.

When the **Insert Object** dialog opens:

1. Select the **Create from File** option.
2. Check the **Link** box.
3. Browse for the wanted file, then click **OK**.

The object is added (linked) to the cover sheet.

 **Note:** A linked object is framed with dashed lines.


## ***Managing OLE 2.0 Objects in a Cover Sheet***

---

### **Editing an Object in a Cover Sheet**

It is possible to edit objects directly from the cover sheet, only by double-clicking them. However, the behavior is slightly different depending on the status (embedded or linked) of the object:


- If the object is embedded:
  1. the application that created it opens inside the Cover Sheet Editor;
  2. when your modification is done, you just need to click in the cover sheet, outside the object.
- If the object is linked:
  1. the application that created it opens independently, outside the Cover Sheet Editor;
  2. when your modification is done, you need to save the object before closing its application.

 **Note:** In that case, be aware that the source file indicated by the link will be modified (not only in the cover sheet).

### Converting an Object

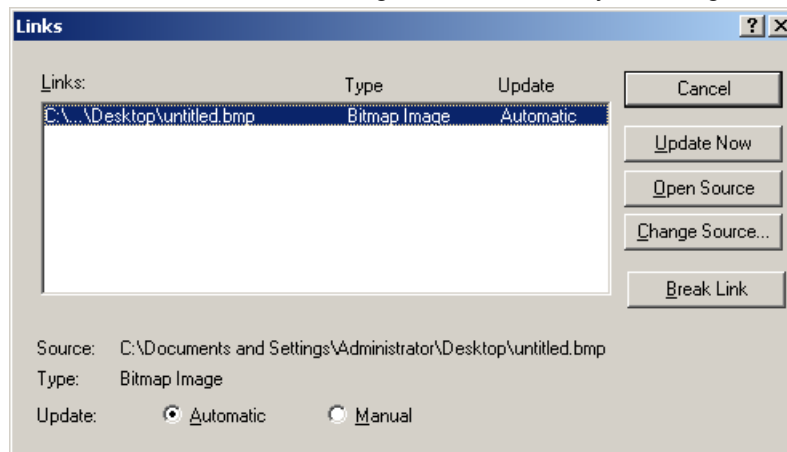
Depending on the supported formats, you can convert an object to another format.

When an object is selected, just select **Edit ► Object\_Type Object ► Convert**, then choose the target format for conversion.


-  **Note:** *Object\_Type* is the type of the object selected. The possible conversions depend on this object type.

### Managing Links (Linked Objects only)

You can access the links management interface by selecting **Edit ► Links**.



All linked objects of the current cover sheet are listed in this interface.

-  **Note:** If a linked object was selected when you opened this interface, it will be selected by default in the list. However, once the interface is open, you can select any other object of the list and manage its link settings.

By default, linked objects in a cover sheet are updated automatically (option: **Automatic**). When the object is changed through the application that created it, those changes are reflected immediately and automatically in the cover sheet.

However, updating can be made manual (option: **Manual**). When manual updating is selected, the object remains as it was when you originally linked to it. Changes are only applied to the original object, and not on the object of the cover page. If you need to update the latter, you can use the **Update Now**.

For example, a logo already used as a linked object in a cover sheet is to be modified. You might change the update from automatic to manual while these changes are being made. When the modifications are finished, you can return to automatic updating, or maintain the manual update in anticipation of further changes.

Through the same interface, you can also:

- Launch the application to edit the linked object (**Open Source**)
- Transform the linked object to an embedded object by breaking the link (**Break Link**)
- Change the link to point to another object (**Change Source**)



## Chapter 9 *Monitoring Your Faxes and Your Account*

### *Monitoring Your Faxes and Your Account*

To see the whole content of your Fax Box and know the status of all faxes you have sent or received, you must use by default the Web Access client (see [Overview](#) on page 89).

Also, your faxing profile may have been set by the administrator so that you receive e-mail notifications regarding the fax activity in your FaxBox (see [Faxing with Email Clients: Overview](#) on page 51).

In addition to this, you can monitor live the current status and most recent activity of your fax account via a dynamic icon located in the Windows taskbar (see [The Fax Account Monitoring Spot](#) on page 85).

### *The Fax Account Monitoring Spot*

When installed, this feature provides a means to continuously monitor your fax account activity (i.e. connectivity and fax events related to your fax account). It also provides a quick access point to your Web based Fax Box.

It is represented by a dynamic and interactive icon located in the Windows taskbar:



#### Understanding the Icon Status

Status	Description	Remains until...
	You are connected to the fax system and...	There is no fax error.
		There is at least an inbound or outbound fax with errors in your fax history folders.
		At least a received fax is still unread (Inbound History) or a fax is being sent (Outgoing Queue).
	The fax system is unreachable (either due to a server issue or incorrect account settings – see <a href="#">Settings Management</a> on page 86).	The system becomes reachable.

**Note:** The icon status is refreshed every minute.

### Additional Interactivity

Action	Effects
On mouse over	The icon status is instantly <b>refreshed</b> and a <b>tooltip</b> pops up with related information (connected user account, status message, number of faxes concerned by the status...).
On double-click	Your <b>Fax Box</b> opens via your Web browser (see <a href="#">Overview</a> on page 89).
On right-click	You can manage the feature <b>settings</b> (see <a href="#">Settings Management</a> on page 86).

## Settings Management

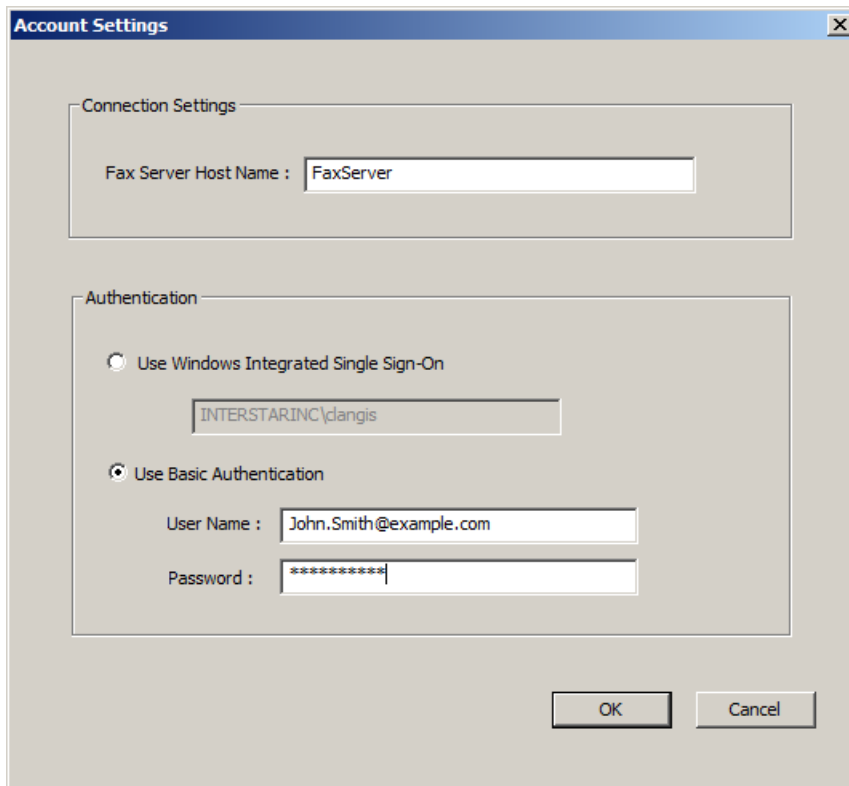
---

### Language Settings

To adjust the display language of the feature, right-click on the monitoring icon in the Windows taskbar and select your **Language**.


### Account Settings

To manage the connection settings used by the monitoring icon, right-click on the icon in the Windows taskbar and select **Account Settings**.



All connection and logon settings described below are mandatory for being able to use the feature:

- **Connection Settings:**

Field	Description
<b>FaxServer Host Name</b>	<p>The name (or URL) used to reach the Fax Server host.</p> <p> <b>Attention:</b> This value should have been correctly set (or communicated) by your administrator while installing the feature; you should not have to change it.</p> <p>Acceptable syntax: [{http https}://]&lt;ServerName_or_IP&gt;[:&lt;Port&gt;]</p> <p>In HTTPS context, &lt;ServerName_or_IP&gt; must be the Common Name of the Fax Server (and not its IP address).</p>

- **Authentication:**

Option	Description
<b>Use Windows Integrated Single Sign-On</b>	If you wish to log in automatically with your current Windows Account.
<b>Use Basic Authentication</b>	If you wish to log in using your faxing account registered by the Fax Server ( <b>User Name</b> and <b>Password</b> ).



## Chapter 10

## Web Client


### Overview

XMediusFAX provides a browser-based interface for faxing and displaying the status of sent, received and queued faxes. This interface is referred to by the terms web access and/or Web Client, and these terms may be used interchangeably throughout this manual.

### Logging into the Web Access

1. Launch your Web browser using the link or address communicated by your administrator.

Typically: `http://<ServerName_or_IP>/fax`

 **Note:** In HTTPS context, the syntax becomes: `https://<ServerName>/fax`

where `<ServerName>` must be the Common Name of the Fax Server (and not its IP address).

The web access login screen appears, as depicted in the following screenshot.





Email Address :

Password :

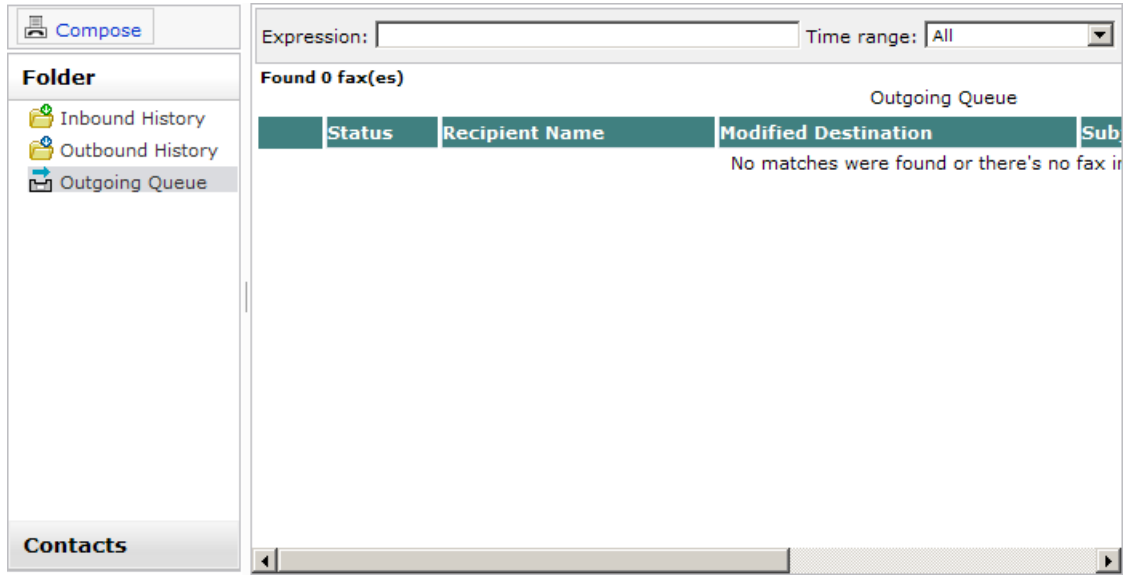
Stay signed in

Login

 **Note:** If your system administrator has enabled access with your current NT account, you will have automatic access to the **Fax Status** screen.

2. Enter your **Email address** (or SMTP address), as assigned by the system administrator.
3. Enter your **Password**.
4. If needed, check the **Stay signed in** box to access the interface more quickly on next logins.
5. Click **Login**.

The **Fax Status** page of the web access appears (with the **Outgoing Queue** tab selected), as depicted in the following screenshot.

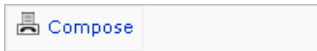


**Note:** If you wish to access another user's fax box as Delegate (in the case this feature is available to you), see: [Accessing the Interface \(of Another User\) as Delegate](#) on page 120.

## Web Access Interface Description

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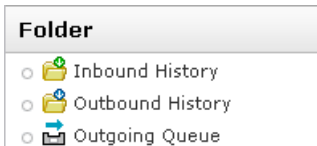
### Compose Button



The **Compose** button located on the left side of the web user interface opens a page from which you can configure, compose, and send faxes directly from a web browser. For more details, see the following section: [Compose Feature](#) on page 112.

**Note:** You may not have access to the **Compose** button depending on your faxing rights.

### Navigation Frame




The **Folder** menu of the web access contains three folders (Inbound History, Outbound History and Outgoing Queue) where you can see the status of faxes you have received, sent, or are currently being sent or waiting to be sent. Full details can be found further on in this chapter, starting with the section, Inbound History [Current View](#) on page 92.

**Note:** At the bottom of this frame, you can also find the **Contacts** button, giving access to your available Phone Books (see [Web Phone Book](#) on page 123).

### General Menu


john.smith@example.com | [Options](#) | [Help](#) | [Logout](#)

The general menu – located in the top-right corner of the interface – includes the following items:

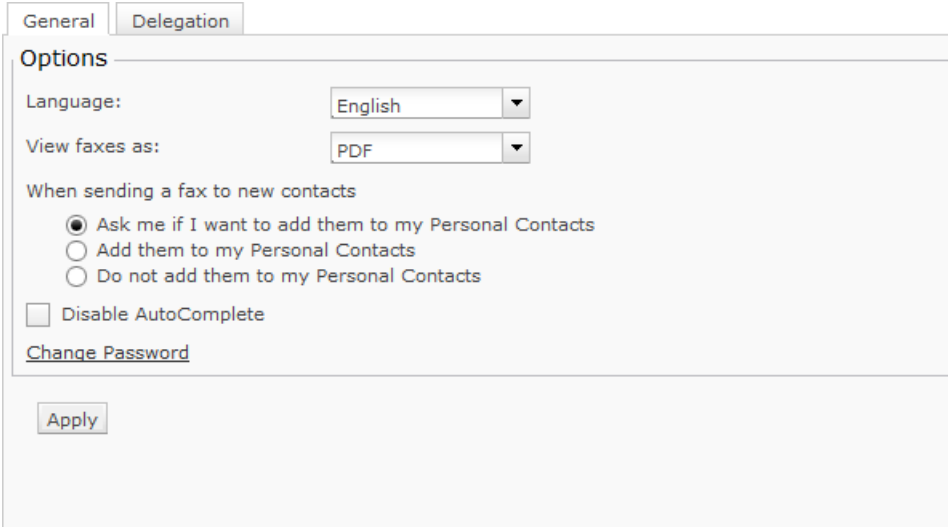
Menu Item	Description
<b>Fax Box</b> / user name	Indicates the XMediusFAX user name corresponding to the current fax box.   <b>Note:</b> this part of the menu may appear in the form of a drop-down list, meaning that you are currently Delegate for another XMediusFAX user. For more details, see <a href="#">Accessing the Interface (of Another User) as Delegate</a> on page 120.
<b>Options</b>	Opens a dialog where several interface options can be changed (see <a href="#">Web Access Options</a> on page 91).
<b>Help</b>	Launches an online help about the Web Access.
<b>Logout</b>	Logs the current user out of the application.

### **Web Access Options**

The **Options** link gives access to the two options tabs described below.

 **Note:** These two tabs are displayed only if your administrator enabled the Delegation feature. If not, only the **Options** section (described here under the **General** tab) will appear.

#### **General**



Option	Description	Default
<b>Language</b>	To change the display language of the interface.	
<b>View faxes as</b>	To change the viewing format of faxes (TIF or PDF).	PDF
<b>When sending a fax to new contacts</b>	To configure the automatic adding of contacts to your phone book. For more information refer to <a href="#">Configuring Automated Adding of Contacts</a> on page 127.	<b>Ask me if I want to add them to my Personal Contacts</b>
<b>Disable Autocomplete</b>	To disable the automatic selection of phone book contacts while typing a name or fax number in the fields of the <b>Compose</b> tab.	Unchecked

Option	Description	Default
Change Password	To change the password of your XMediusFAX account.	

### Delegation

This tab allows you to:

1. Add other XMediusFAX users as Delegates.
2. Configure the permissions to give them access to your fax box.

For more information, see: [Adding and Managing Delegates](#) on page 119.

### [Link to Download XMediusFAX Installer for Windows Client Applications](#)

The link at the bottom right of the Web Access Interface screen will allow to download the XMediusFAX client applications installer.

Among the applications you can install the Web Fax Composer Printer which can be useful when using the Web Access. See [Attaching Documents to a Fax by Using the Web Fax Composer Printer](#) on page 121 for more information on this feature.

## Fax Status - Inbound History

### Current View

In the **Inbound History** tab, you can select between **Current** or **Deleted** views. The **Current** view displays the status of all the current faxes you have received. For more details concerning the **Deleted** view, refer to [Deleted View](#) on page 102.

Expression:  Time range: All  Sta

Folder view: Current | Deleted

Mark as viewed Mark as unviewed Delete Forward ▼

◀◀ 1 to 3 of 3 ▶▶

	Received Time	Duration (sec.)	DNIS/DID	Remote CSID	AN
☐ ☐ ☐	Wednesday, October 12, 2011 2:49:58 PM	0	5140123456	MY Organization	
☐ ☐ ☐	Wednesday, October 12, 2011 2:49:58 PM	0	5149876543	MY Organization	
☐ ☐ ☐	Wednesday, October 12, 2011 2:49:58 PM	0	5141234567	MY Organization	

◀◀ 1 to 3 of 3 ▶▶

Mark as viewed Mark as unviewed Delete Forward ▼

Contacts



## Searching Inbound History Records

You can display all, or a specific selection of faxes, by using the search bar at the top of the browser. Leaving the fields of the search bar empty will result in all of the received faxes being displayed.

A view of the search toolbar is depicted in the following screenshot. The fields and options in the search toolbar allow you to enter criteria that can locate a specific set of faxes you suspect are in the inbound history archive. XMediusFAX searches the entire database of fax records. This version of XMediusFAX Web Client has been enhanced to encompass more precise and versatile searches.

Fields:

Buttons:

In the first field of the search bar, you can enter a keyword to search for. The search can be performed in any or all of the fields relative to the fax, depending on which you choose in the **Search option menu**, accessed by clicking the **Options** button. The **Search option menu** is depicted in the following screenshot.

As can be seen by the options in the **Search option menu**, the Web Client can be made to search in two modes:

- **By keyword on all properties;** in this mode the user has the search capability of including or excluding specific keywords in a search expression much like a search engine.
- **By exact match on selected properties;** in this mode the user has the capability to search exact matches in the specified fields. The operator **OR** must be specified to delimit the words in the search field.

The following table provides further details on search parameters when using the **By keyword on all properties** option.

Operator	Description
+ -	The + and - operators indicate that a word is required to be present or absent, respectively, for a match to occur. The operators must be placed before (without a space) the word. e.g. +xxx -yyy.
*	The asterisk serves as the truncation (or wildcard) operator. It should be appended to the word to be affected. Words match if they begin with the word preceding the * operator.
"	A phrase that is enclosed within double quote ("" ) characters matches only rows that contain the phrase literally, as it was typed. The full-text engine splits the phrase into words and performs a search for the

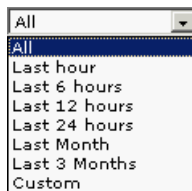
Operator	Description
	words. Non-word characters need not be matched exactly. Phrase searching requires only that matches contain exactly the same words as the phrase and in the same order. For example, "test phrase" matches "test, phrase".

**Note:** The search **By keyword on all properties** is designed to ignore specific “generic” words called Stop words such as *the, or, again, etc.* These Stop words can be modified to add or remove specific words that may interfere with the nature of the search. Consult with your system administrator for further information.

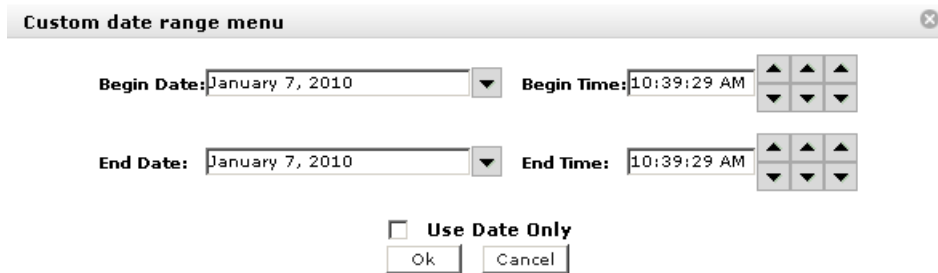
**Note:** In this context, a token (word) is defined as any sequence of letters, digits, underscores but only 1 apostrophe in a row. For example:

- aaa'666 is considered as 1 word
- a'b'c65 is considered as 1 word
- a"abcd6 is considered as 2 words

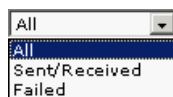
You can also specify if you want to search based on the criteria if the fax was received at any time, or within a certain time range. Browsing the first selection box from the left, in the search bar, will give you the following selection of time ranges:



Click on the desired time range. Selecting **Custom** opens the **Custom date range menu**, where you can specify a range of dates only, by checking the **Use Date Only** box and choosing your begin and end date appropriately. If the box is unchecked, you must also specify a start time on the begin date and a finish time on the end date. Refer to the following screenview for a depiction.




You can also indicate if you want to view all the current faxes, or only either the received or the failed ones. To do this, browse the second selection box in the search bar, and select among the choices that appear as depicted in the following screenview.



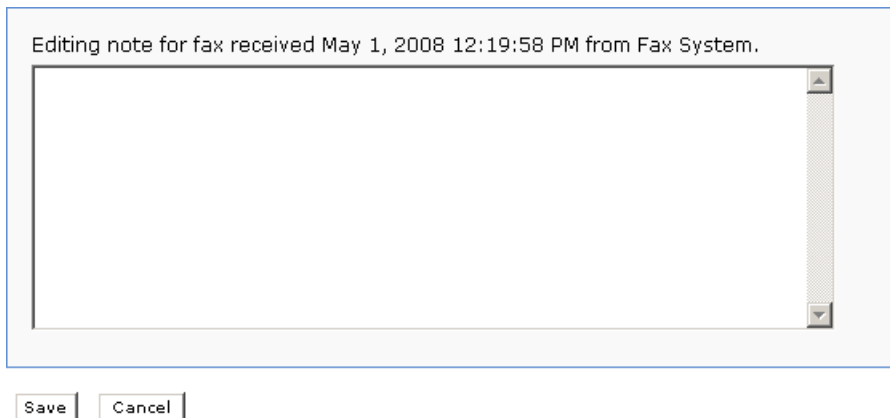
## **Fax Note**

---

The Fax Note feature allows users to add personal text notes for Inbound and Outbound faxes.


 **Note:** For example, a user can use Fax Notes as content reminders or as keywords for search queries.

When a user clicks the **Fax Note** icon , the fax note editor is displayed:



Editing note for fax received May 1, 2008 12:19:58 PM from Fax System.

Save Cancel

 **Note:** The editor has a maximum capacity of 2500 characters per fax note.

Click the **Save** button to close the fax note editor. The messages contained in the fax notes are copied when forwarded.

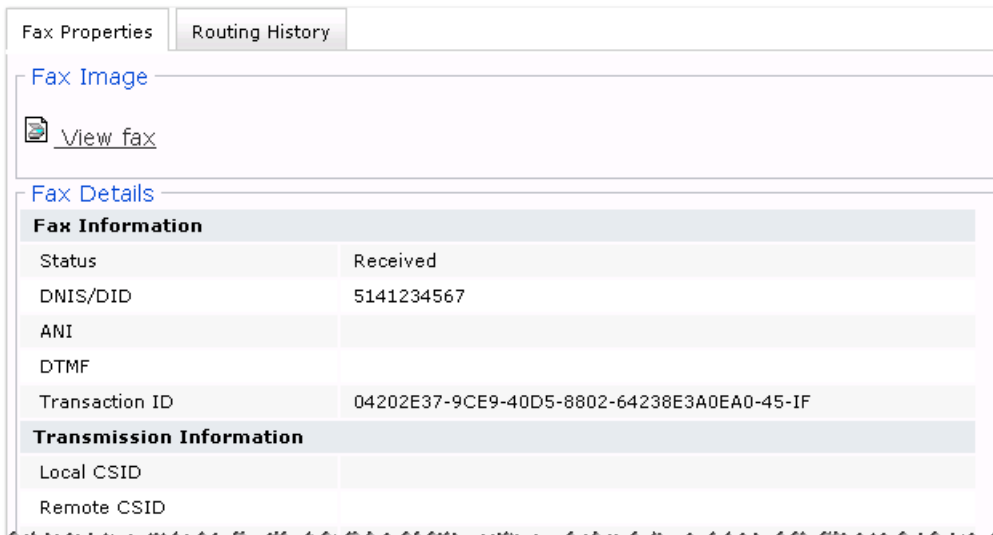
## **Viewing the Inbound Fax Details**

---

To view the details of a received fax, just click on the concerned fax entry in the **Inbound History**.


The inbound fax details are divided in two tabs:

### **Fax Properties**



Fax Properties Routing History

Fax Image

 View fax

Fax Details

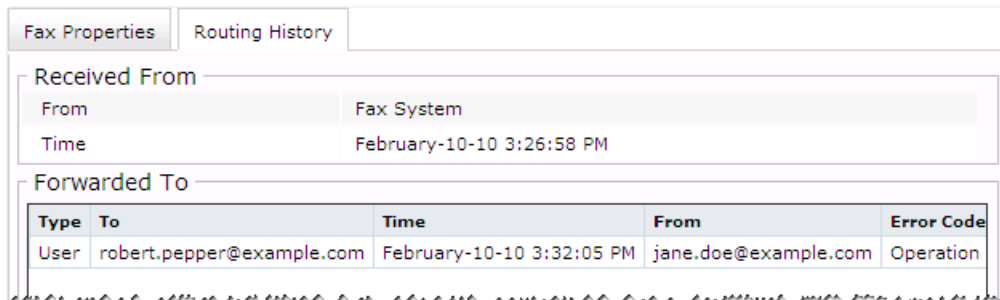
Fax Information	
Status	Received
DNIS/DID	5141234567
ANI	
DTMF	
Transaction ID	04202E37-9CE9-40D5-8802-64238E3A0EA0-45-IF
Transmission Information	
Local CSID	
Remote CSID	

This tab:

- gives you access to the fax image by clicking **View Fax**, and
- lists all the fax information described below.


Group/Property	Description
<b>Fax Information</b>	
Status	The status of the received fax.
DNIS/DID	The recipient's Dialed Number Identification Service/Direct Inward Dialing number.
ANI	The recipient's automatic number identification.
DTMF	The recipient's number for dual-tone multi-frequency inbound routing. By default, this column is not visible.
Transaction ID	The transaction ID as a unique string identifying the fax.
<b>Transmission Information</b>	
Local CSID	The local call station ID, that is, the recipient's call station ID.
Remote CSID	The remote call station ID, that is, the sender's call station ID.
Channel Number	The channel that received the fax.
Speed (bps)	The speed of transmission in baud rate (bits per second) or in kilobytes.
<b>Time and Size Information</b>	
Received Time	The time the fax was received.
Archived Time	The time the fax was archived.
Duration (sec.)	The amount of time for transmission (in seconds).
Pages Received	The number of pages actually received.
<b>Error Information</b>	
Error Code	The Error Code generated in case of failure.
Description	The description of the Error Code above.


### Routing History



This tab lists the routing information and history for this fax:

Group/Property	Description
<b>Received From</b>	


Group/Property	Description
From	The originator of the fax.
Time	The actual date and time at which the fax was sent to you.
<b>Forwarded To</b> (contains information only if this fax has been forwarded after you received it)	
Type	The type describing the forwarding originator.
To	The forwarding destination.
Time	The forwarding date and time.
From	The user who forwarded the fax. Typically, this will be your account name.  <b>Note:</b> If you delegated a user for forwarding your faxes (see <a href="#">Adding and Managing Delegates</a> on page 119), the account name of this Delegate will appear there instead of your name.
Error Code	Description of the error if the forwarding was not successful.

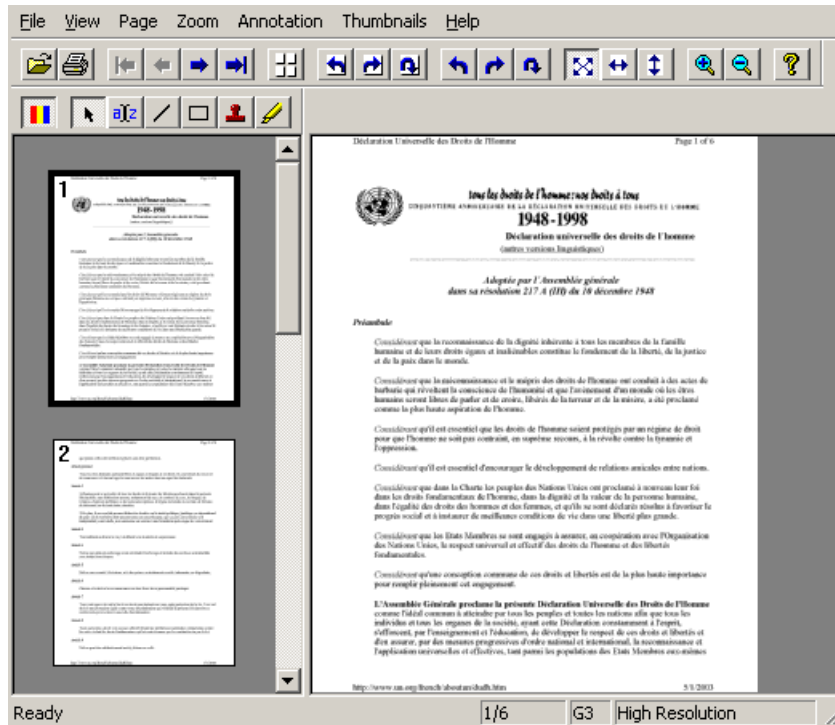
 **Note:** The fax may have been forwarded several times or to several destinations; in all cases, all forwarding information will be listed under this tab.


### ***Viewing Inbound Faxes***

---

To display the content of a received fax in a browser window:


1. Click on the  button in the Inbound History window.  
The **File Download** dialog appears.
2. Select **Open**.
3. Click **OK**.  
The **TIFF Imaging Preview** window appears, as depicted in the following screenview.






4. You can use the menus or buttons in this window, to edit, print, zoom in or out, or rotate the fax image.
5. Close the window when you're done by clicking the  button, in the upper-right corner of the window, or by selecting **File > Exit**.

### Managing your Inbound Faxes

The Inbound History Current view offers a user various options to manage faxes, by using buttons such as: **Mark as viewed**, **Mark as unviewed**, **Delete**, and **Forward**. Refer to the following screenview, as well as table, for an overview.

 Compose

**Folder**

-  Inbound History
-  Outbound History
-  Outgoing Queue

**Contacts**



Expression:  Time range: All ▼ Sta

Folder view: Current | Deleted

◀ 1 to 3 of 3 ▶▶

	<u>Received Time</u>	<u>Duration (sec.)</u>	<u>DNIS/DID</u>	<u>Remote CSID</u>	<u>AN</u>
⋮	Wednesday, October 12, 2011 2:49:58 PM	0	5140123456	MY Organization	
⋮	Wednesday, October 12, 2011 2:49:58 PM	0	5149876543	MY Organization	
⋮	Wednesday, October 12, 2011 2:49:58 PM	0	5141234567	MY Organization	

◀ 1 to 3 of 3 ▶▶

Button	Description
<b>Mark as viewed</b>	When a fax is received in the Inbound History status view, it is flagged as bold text. This indicates that the inbound fax has not yet been read. Once the fax has been viewed, it is flagged as unbold text. The user can opt to reset this flag and set the status to mark as viewed, without opening the fax(es) by simply clicking the <b>Mark as viewed</b> button.
<b>Mark as unviewed</b>	A user can opt to reset the status of a fax as unviewed, by clicking on the <b>Mark as unviewed</b> button. The fax is once again bolded to indicate unread status.
<b>Delete</b>	When a user selects a fax or multiple faxes and clicks on the <b>Delete</b> button, the Inbound History display refreshes and removes the selected fax(es). Deleted faxes can be viewed by clicking on the <b>Deleted</b> button of the search bar.
<b>Forward</b>	This button allows you to forward one or several received faxes to one or several subsequent recipients.  It is actually a full feature that includes several user friendly options such as recently used and favorite destinations, and fax drag-and-drop for quick forwarding (see <a href="#">Forwarding Faxes</a> on page 99).   <b>Note:</b> Faxes to be forwarded can be either selected from the <b>Current</b> or <b>Deleted</b> screens of the Inbound History.
<b>Refresh</b>	The <b>Refresh</b> button updates the list to the latest entries.   <b>Note:</b> The <b>Refresh</b> button appears in the Inbound History, Outbound History, and Outgoing Queue tabs but is mentioned only here in this manual.

The process is straightforward, simply select one or more faxes by checking the box(es) to the left of all the fax entries in the Inbound History window and then click on the appropriate button depending upon the desired action.


### ***Forwarding Faxes***

---

Faxes can be forwarded from the **Inbound History** (either in **Current** or **Deleted** view):

#### **Starting the Forwarding**

Before selecting recipients, you have two options to start the forwarding action:

- Check the box at the left of the line (of one or several faxes), then click **Forward**, or
- Directly drag the fax (or a multiple selection of faxes) to the **Forward** button using the handle (  ) at the left of the line.

#### **The Forward Button/Menu**

In all cases, the **Forward** button will deploy a menu from which you can select destinations for:

- Quick forwarding (see [Quick Forwarding](#) on page 99).
- Advanced forwarding (see [Advanced Forwarding](#) on page 101).

### ***Quick Forwarding***

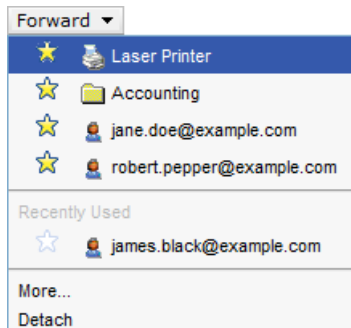
---

You can benefit from several features and options allowing you to quickly forward faxes to your most used destinations.

However, as these features depend on your actual fax forwarding activity, you may first need to go several times through the advanced forwarding window before obtaining an effective quick-forward environment (see [Advanced Forwarding](#) on page 101).

### Quickly Available Destinations

The **Forward** menu contains – among other options – a list of the most recent destinations you may have used for forwarding faxes, and a list of destinations you may have tagged as favorites (see [Managing the Favorites](#) on page 100).



Selecting a destination in one of those lists (by click on fax selection or by fax drag-and-drop) will instantly forward the concerned faxes to this destination.

**Note:** If you wish to forward the same fax to several destinations, you need to repeat the same action with all concerned destinations, or you can perform this in one single action by selecting **More**.

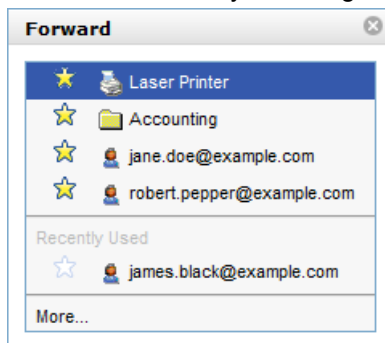
### Managing the Favorites

Everywhere a destination is listed in the interface via the Forward feature (in the **Forward** menu or in the advanced forwarding window), a clickable star is displayed at its left for allowing to add it as Favorite or remove it from the list of Favorites.

The full list of Favorites is displayed in the **Forward** menu, above the Recently Used destination list.

### Repetitive Forwarding to Various Destinations

If you need to repetitively forward faxes to various destinations, for example when you are in charge of distributing faxes received via a single fax number to various internal recipients of your company, this operation can be facilitated by selecting **Forward > Detach** before starting forwarding faxes.

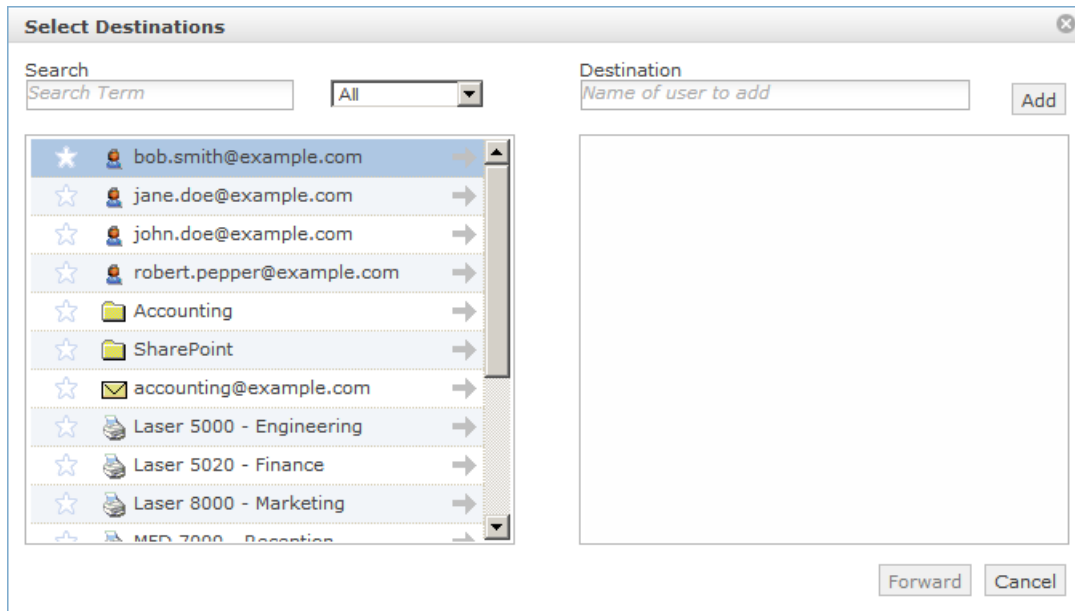


This way, you have all the content of the Forward menu permanently available in a detached window, allowing you to quickly drag-and-drop faxes to any of your recent or favorite destinations.




## Advanced Forwarding

By selecting **Forward ► More**, you access a window from which several more specific and advanced actions can be performed.



### Forwarding the Fax Selection to Several Destinations

Once you access this screen, you just need to click on the available destinations of the left list to add them to the right – in order to build a list of destinations to which the fax selection will be forwarded – and then click **Forward**.

 **Note:** If you selected a destination by mistake, just click on it in the right list to remove it from the selection.

### Searching Available Destinations


You can search destinations by entering characters in the **Search** field: the list below will instantly be updated to display only destinations whose name contains (anywhere in the name) the entered sequence of characters.

### Filtering the Available Destinations

The available destinations can be of different types (fax users, folders, printers...). You can filter them by type using the drop-down list at the right of the **Search** field. All types are displayed by default.

### Adding an External Email to the Forward Destinations

If you wish to forward the fax selection to an email address that does not correspond to any available destination (listed in the left), you just need to enter it in the **Destination** field and click Add. It will then be added to the forwarding list below – as user destination.

 **Note:** After the forwarding action, this added destination will appear as Recently Used destination in the Forward menu, but will not be added to the available destinations of XMediusFAX (left list in the advanced forwarding window).

## Deleted View

---

The Inbound History Deleted view displays the status of all inbound faxes that were deleted and those marked for permanent deletion (refer to the following screenshot).

The Inbound History Deleted view has very similar functionality as the Inbound History Current view; in fact the user has the identical button options, but with the addition of an **Undelete** button. If the user clicks on the **Undelete** button, the selected fax(es) are returned to the Inbound History Current view. When the user clicks **Current** on the search bar, the fax(es) should now be available.

Another difference between the Inbound History Current and Deleted views, is that when in the Deleted view, clicking on the **Delete** button will permanently delete the selected fax(es).

Finally, note that a user can also forward a selected fax(es) while in the Deleted view by using the **Forward** button.

## Fax Status - Outbound History

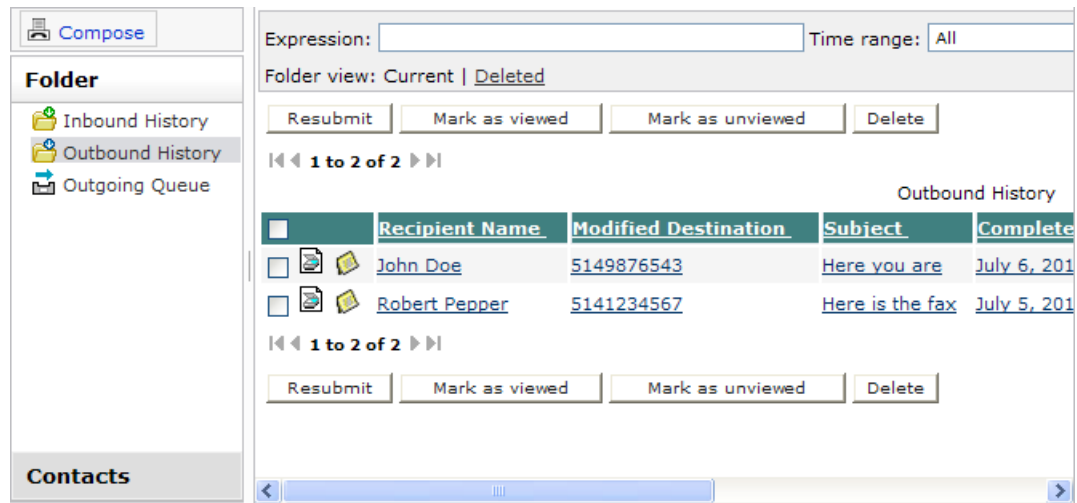
---

### Outbound History: Current View

---

In the **Outbound History** tab, you can select the **Current** or **Deleted** views.

The **Current** view displays the status of all the current faxes that you have sent.



For more details concerning the **Deleted** view, refer to [Outbound History: Deleted View](#) on page 107.

### Searching Outbound History Records

You can display all or a specific selection of faxes by using the search bar located at the top of the browser. Leaving the fields of the search bar empty will result in all of the current faxes being displayed.

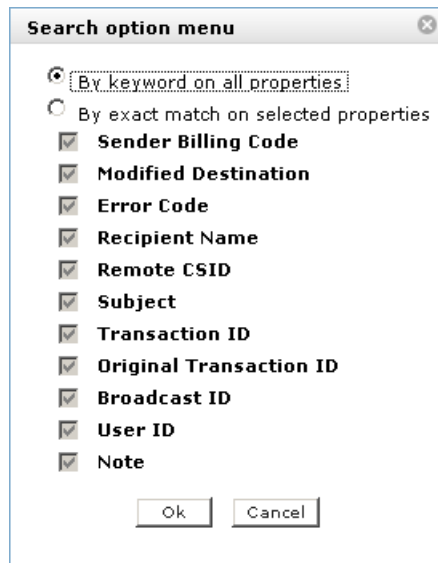
A view of the search toolbar is depicted in the following screenshot. The fields and options in the search toolbar allow you to enter criteria that can locate a specific set of faxes you suspect are in the outbound history archive. XMediusFAX searches the entire database of fax records.

Fields:

Expression:  Time range:  Status:

Buttons:

Searching the Outbound History records is accomplished in basically the same manner as searching the Inbound History records, subject covered previously in this chapter in the section, [Searching Inbound History Records](#) on page 93; the only difference being the list of properties available in the **Search option menu**, accessed by clicking the **Options** button of the search toolbar. The **Search option menu** specific to the Outbound History search is depicted in the following screenshot:



The use of the search fields and options is otherwise the same:

- In the first field of the search bar, you can enter a keyword to search for. The search can be performed in any or all of the fields relative to the fax, depending on which you choose in the **Search option menu**.
- Browsing the first selection box from the left, in the search bar, will give you a selection of time ranges should you wish to search based also on the criteria of whether the faxes were received at any time, or within a certain time range.
- Browsing the second selection box in the search bar, you can also indicate if you want to view the status of all the faxes, only the received ones or only the failed ones.

### ***Fax Note***

---

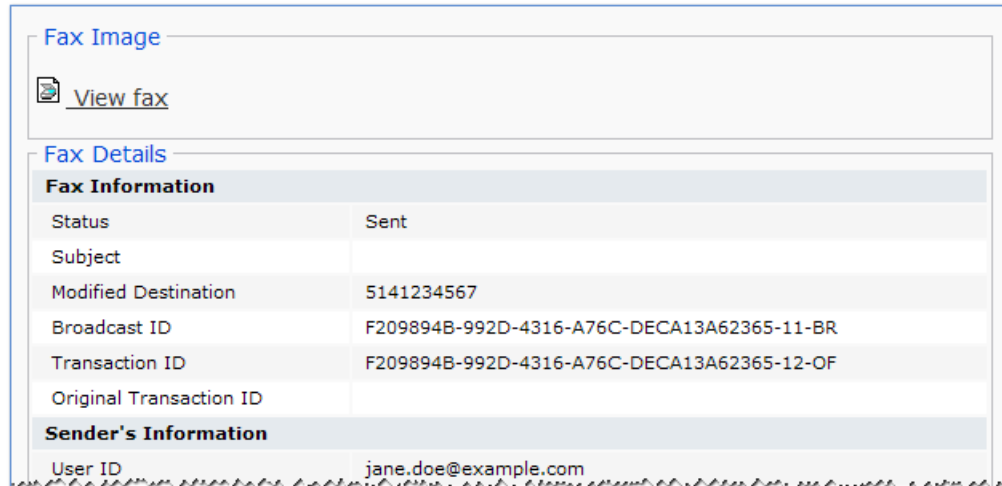
The Fax Note feature allows users to add personal text notes for Inbound and Outbound faxes. For more details, refer to [Fax Note](#) on page 95.

### ***Viewing the Outbound Fax Details***

---

To view the details of a sent fax, just click on the concerned fax entry in the **Outbound History**.

## Fax Properties



This screen:

- gives you access to the fax image by clicking **View Fax**, and
- lists all the fax information described below.

Group/Property	Description
<b>Fax Information</b>	
Status	The sending status of the fax.
Subject	The subject of the fax.
Modified Destination	The outbound fax destination as reported by the modification table.
Broadcast ID	The unique ID for a fax that was sent to multiple recipients.
Transaction ID	The transaction ID as a unique string identifying the fax.
Original Transaction ID	The unique ID assigned to a resubmitted fax. This value does not change, no matter how many times the fax is resubmitted.
<b>Sender's Information</b>	
User ID	The SMTP address of the sender.
Sender Billing Code	The sender's billing code.
Sender Sub Billing Code	The sender's sub billing code.
<b>Recipient's Information</b>	
Recipient Name	The name of the recipient.
Recipient Billing Code	The recipient's billing code.
Recipient Sub Billing Code	The recipient's sub billing code.
<b>Transmission Information</b>	

Group/Property	Description
Original Destination	The original destination before that destination was changed by the modification table.
Priority	The sending priority.
Remote CSID	The recipient's call station ID.
Channel Number	The channel that sent the fax.
Attempt Count	The number of attempts to dial the fax number.
Number of Retries	The maximum number of retries available.
Retry Delay (min.)	The time between retry attempts.
Speed (bps)	The speed of transmission in baud rate (bits per second) or in kilobytes.
Delayed Until	Delay date and time for a fax whose transmission has been delayed.
<b>Time and Size Information</b>	
Submitted Time	The time the fax was submitted.
Completed/Failed Time	The time the transmission was completed or was acknowledged as a failed transmission.
Archived Time	The time the fax was archived. (Property appearing only in Outbound History)
Duration (sec.)	The amount of time for transmission (in seconds).
Pages Submitted	The number of pages submitted.
Pages Sent	The number of pages sent.
<b>Error Information</b>	
Error Code	The Error Code generated in case of failure.
Description	The description of the Error Code above.

### ***Viewing outbound faxes***

---

The procedure for displaying the contents of an outbound fax in a browser window is the same as the one for an inbound fax. For details, refer back to the section, [Viewing Inbound Faxes](#) on page 97.

### ***Managing your Outbound Faxes***

---

The Outbound History **Current** view offers a user various options to manage sent faxes:

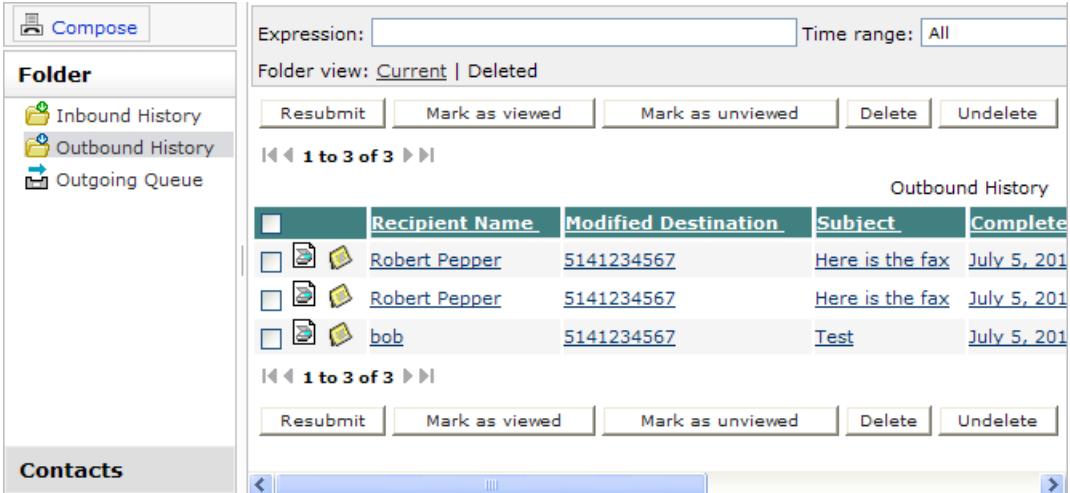
Button	Description
<b>Mark as viewed</b>	When a selected fax(es) has been sent to a recipient(s), the fax(es) selected can be marked as read by clicking the <b>Mark as viewed</b> button. This action sets the flag status to unbold in the Outbound History Current view.
<b>Mark as unviewed</b>	By clicking on the <b>Mark as unviewed</b> button, this action resets the fax(es) as unread by rendering them in bold.

Button	Description
<b>Delete</b>	When a user selects a fax(es) and clicks on the <b>Delete</b> button, the Outbound History Current view refreshes and removes the selected fax(es). Deleted faxes can be viewed by clicking on the <b>Deleted</b> button of the search bar.
<b>Resubmit</b>	<p>Click the <b>Resubmit</b> button to resubmit faxes:</p> <ul style="list-style-type: none"> <li>• Either to the same numbers – by default, without entering a new number.</li> <li>• Or to different number(s) – by entering them in the dedicated field.</li> <li>• Possibly with a (new) transmission delay – by entering a Date and Time after having checked the <b>Delay Transmission Until</b> feature.</li> </ul> <div data-bbox="609 531 1377 856" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>Resubmit</b></p> <p>Please enter the fax number you wish to send your faxes to :</p> <input type="text" value="5141234567"/> <p><input type="checkbox"/> Delay transmission until :</p> <p>Date: <input type="text" value="July 6, 2010"/> Time: <input type="text" value="10:00:00 AM"/></p> <p><input type="button" value="Resubmit"/> <input type="button" value="Back"/></p> </div> <p>After validation, the selected fax(es) will be sent to the <b>Outgoing Queue</b> for processing.</p>

 **Note:** You may not have access to the **Resubmit** button depending on your faxing rights.

### Outbound History: Deleted View

The Outbound History **Deleted** View displays the fax status of all outbound fax(es) that were deleted. The user has the identical button options as in the Outbound History **Current** view with the addition of an undelete feature.




Expression:  Time range:

Folder view: [Current](#) | [Deleted](#)

Outbound History

<input type="checkbox"/>	Recipient Name	Modified Destination	Subject	Complete
<input type="checkbox"/>	<a href="#">Robert Pepper</a>	<a href="#">5141234567</a>	<a href="#">Here is the fax</a>	<a href="#">July 5, 201</a>
<input type="checkbox"/>	<a href="#">Robert Pepper</a>	<a href="#">5141234567</a>	<a href="#">Here is the fax</a>	<a href="#">July 5, 201</a>
<input type="checkbox"/>	<a href="#">bob</a>	<a href="#">5141234567</a>	<a href="#">Test</a>	<a href="#">July 5, 201</a>

If the user clicks on the **Undelete** button, the selected fax(es) are returned to the Outbound History Current view.

 **Note:** In the Outbound History Deleted View, if the user clicks on the **Delete** button, a permanent delete warning message is issued.

## Fax Status - Outgoing Queue

---

### View

---

The **Outgoing Queue** tab displays the status of faxes that are currently being sent or waiting to be sent.

This view includes also:

- Any fax for which the destination has returned a busy signal: the fax remains in the queue until XMediusFAX issues a retry.
- Any fax for which you entered a transmission delay (for scheduled faxing): the fax remains in the queue with the `Delayed` status until the scheduled date is reached.

The screenshot shows the XMediusFAX web client interface for the Outgoing Queue. On the left, there is a 'Folder' pane with 'Inbound History', 'Outbound History', and 'Outgoing Queue' (selected). Above it is a 'Compose' button. The main area contains a search toolbar with an 'Expression' input field and a 'Time range' dropdown menu set to 'All'. Below the toolbar are 'Cancel' and 'Retry now' buttons. A table displays the queue status:

	Status	Recipient Name	Modified Destination	Subject	Priori
<input type="checkbox"/>	Sending	Robert Pepper	5557654321	To be approved	Norm

Below the table are navigation controls: '1 to 1 of 1' and another set of 'Cancel' and 'Retry now' buttons.

### Searching Outgoing Queue Records

---

You can display all, or a specific selection of faxes, by using the search bar at the top of the browser. Leaving the fields of the search bar empty will result in all of the queued faxes being displayed.

A view of the search toolbar is depicted in the following screenshot. The fields and options in the search toolbar allow you to enter criteria that can locate a specific set of faxes you suspect are in the outgoing queue. XMediusFAX searches the entire database of fax records.

Fields:

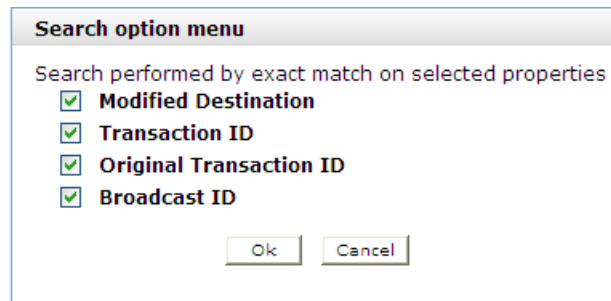
The screenshot shows the search toolbar fields: 'Expression' (input field), 'Time range' (dropdown menu set to 'All'), and 'Priority' (dropdown menu set to 'All').

Buttons:

The screenshot shows the search toolbar buttons: 'Search', 'Options', and 'Refresh'.

Searching the Outgoing Queue records is accomplished in basically the same manner as searching the Inbound History or Outbound History records, subject covered previously in this chapter in section, [Searching Inbound History Records](#) on page 93; the only difference being the list of properties available in the **Search option menu**, accessed by clicking the **Options** button of the search toolbar. The **Search option menu** specific to the Outgoing Queue search is depicted in the following screenshot:





The use of the search fields and options is otherwise the same:

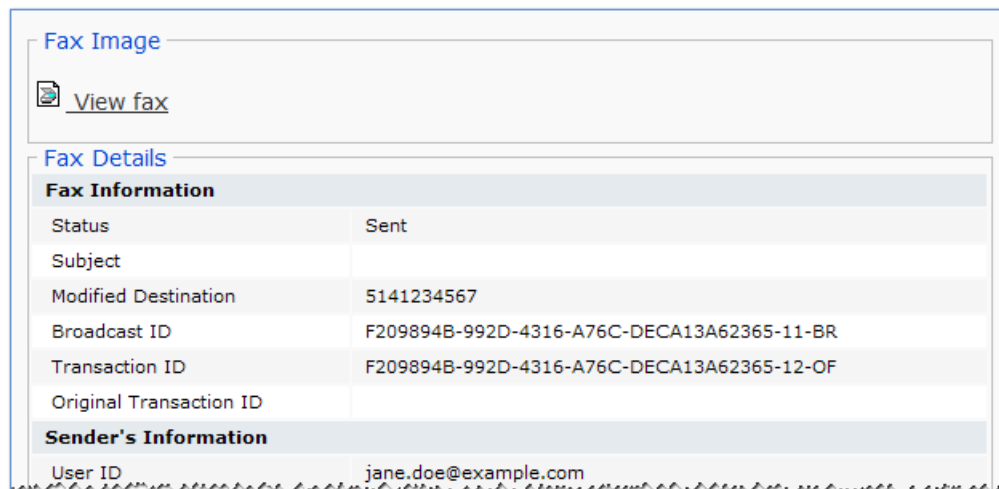
- In the first field of the search bar, you can enter a keyword to search for. The search can be performed in any or all of the fields relative to the fax, depending on which you choose in the **Search option menu**.
- Browsing the first selection box from the left, in the search bar, will give you a selection of time ranges should you wish to search based also on the criteria of whether the faxes were received at any time, or within a certain time range.
- Browsing the second selection box in the search bar, you can also indicate if you want to view the status of all the faxes, only the received ones or only the failed ones.

### ***Viewing the Outgoing Queue Fax Details***

---

To view the details of a queued fax, just click on the concerned fax entry in the **Outgoing Queue**.

#### **Fax Properties**



This screen:

- gives you access to the fax image by clicking **View Fax**, and
- lists all the fax information described below.

Group/Property	Description
<b>Fax Information</b>	
Status	The sending status of the fax.
Subject	The subject of the fax.

Group/Property	Description
Modified Destination	The outbound fax destination as reported by the modification table.
Broadcast ID	The unique ID for a fax that was sent to multiple recipients.
Transaction ID	The transaction ID as a unique string identifying the fax.
Original Transaction ID	The unique ID assigned to a resubmitted fax. This value does not change, no matter how many times the fax is resubmitted.
<b>Sender's Information</b>	
User ID	The SMTP address of the sender.
Sender Billing Code	The sender's billing code.
Sender Sub Billing Code	The sender's sub billing code.
<b>Recipient's Information</b>	
Recipient Name	The name of the recipient.
Recipient Billing Code	The recipient's billing code.
Recipient Sub Billing Code	The recipient's sub billing code.
<b>Transmission Information</b>	
Original Destination	The original destination before that destination was changed by the modification table.
Priority	The sending priority.
Remote CSID	The recipient's call station ID.
Channel Number	The channel that sent the fax.
Attempt Count	The number of attempts to dial the fax number.
Number of Retries	The maximum number of retries available.
Retry Delay (min.)	The time between retry attempts.
Speed (bps)	The speed of transmission in baud rate (bits per second) or in kilobytes.
Delayed Until	Delay date and time for a fax whose transmission has been delayed.
<b>Time and Size Information</b>	
Submitted Time	The time the fax was submitted.
Completed/Failed Time	The time the transmission was completed or was acknowledged as a failed transmission.
Archived Time	The time the fax was archived. (Property appearing only in Outbound History)
Duration (sec.)	The amount of time for transmission (in seconds).
Pages Submitted	The number of pages submitted.
Pages Sent	The number of pages sent.

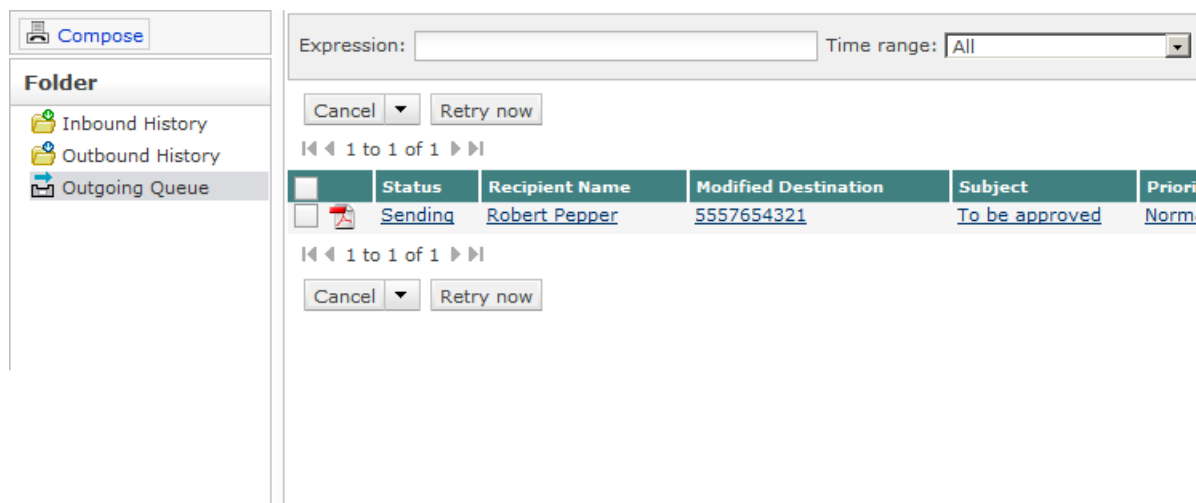
Group/Property	Description
<b>Error Information</b>	
Error Code	The Error Code generated in case of failure.
Description	The description of the Error Code above.


### Viewing queued faxes

The procedure for displaying the contents of a queued fax in a browser window is the same as the one for an inbound fax. For details, refer back to the section, [Viewing Inbound Faxes](#) on page 97.

### Managing your Queued Faxes

The Outgoing Queue view offers a user various options to manage faxes, by using buttons such as: **Cancel**, **Cancel Broadcast**, and **Retry now**. Refer to the following screenshot, as well as table, for an overview.



Button	Description
Cancel	Click <b>Cancel</b> to cancel the transmission of the selected fax(es).
Cancel Broadcast	Check the box to the left of any fax entry in the Outgoing Queue window that is part of the broadcast that you want to cancel and then click the <b>Cancel Broadcast</b> button.   <b>Note:</b> A fax broadcast occurs when an XMediusFAX user addresses the same fax to two or more recipients. Each fax in the broadcast is listed individually in the outgoing queue. You can cancel one or several of these faxes as just described, or cancel the entire broadcast.
Retry now	When a fax(es) is in the Waiting to Retry status mode, this can be caused by a temporary (busy fax line) or permanent error (hardware or software problems) detected by the XMFaxDriver. As soon as this error is corrected, the system switches the status mode to Ready to Send. When the user clicks the <b>Retry now</b> button, the system executes immediately and bypasses the retry delay mode.

- 👉 **Note:** The only way to change the schedule date/time for a delayed fax is to cancel this fax from the Outgoing Queue and then resubmit it from the Outbound History (see [Managing your Outbound Faxes](#) on page 106).

## Compose Feature

---

The Compose button opens a page from which you can configure, compose, and send faxes directly from a web browser. It contains three tabs: **Compose** (default), **Sender & Company Information**, and **Options**. They are used in [Creating and Sending a Fax](#) on page 116.

The **Submit** button located above the tabs transmits the fax.

- 👉 **Note:** Clicking the **Compose** button will clear all the fields of the **Compose** feature tabs.

- 👉 **Note:** You may not have access to the **Submit** button depending on your faxing rights.


### The Compose Tab

---

In the dialog of the **Compose** tab, users can specify the recipient(s) of the fax, modify the cover page, and include file attachments.

In the **Recipients** section, the following fields are available:

<b>Name</b>	The name of the recipient(s).
<b>Company</b>	The organization where the recipient(s) works.
<b>Number</b>	The fax destination number.


 **Note:** To add (and manage) one or more recipient, refer to [Adding One or More Recipients to a Fax](#) on page 117.

In the **Cover Sheet** section, the following fields are available:

<b>Style</b>	Select a cover sheet to append to the memo (the default cover sheet is <code>Basic01.cse</code> ). If you don't want to append a cover sheet, select <b>None</b> .
<b>Subject</b>	The subject of the fax memo.
<b>Comment</b>	The main text message of the fax.

In the **Attachments** section, users can attach one or more files to the fax. For more information, refer to [Adding One or More Attachments to a Fax](#) on page 117.

You can also add attachments by using the Web Fax Composer Printer. See [Attaching Documents to a Fax by Using the Web Fax Composer Printer](#) on page 121.

 **Note:** Although the Web Fax Composer Printer opens the Web Access Compose Feature, it can be used with the Web Access already open and will add attachments to the current fax. It will do so even if there are already attachments in the current fax.

### ***Sender and Company Information Tab***

---

The dialog for the Sender & Company Information tab is where you specify your **Personal Information**, **Billing Information**, and **Company Information**. It is possible to use the information provided in the profile associated with your user account, or directly specify custom information. Refer to the following screenview for a depiction.

Submit

Compose Sender & Company information Options

Use default sender and company information  
 Use custom sender and company information

**Personal Information**

Salutation:  E-mail:

First Name:  Mobile:

Last Name:  Pager:

Job Title:

**Billing Information**

Billing code:

Sub Billing Code:

**Company Information**

Company:  Phone:

Address:  Fax:

City:

State:

Country:

Zip Code:

Restore defaults

Select the **Use default sender and company information** option to use the billing and company information specified in the profile associated with your user account. The personal information will remain empty, except for the e-mail address.

Select the **Use custom sender and company information** option to customize the personal, billing, and company information for the fax. If you select this option, you can enter data in the following fields:

<b>Salutation:</b>	A standard greeting. For example: Mr., Miss, Madam.
<b>First Name:</b>	The sender's first name.
<b>Last Name:</b>	The sender's last name (surname).
<b>Job title:</b>	The sender's job title.
<b>E-Mail:</b>	The sender's e-mail address.
<b>Mobile:</b>	The sender's cellular phone number.
<b>Pager:</b>	The sender's pager number.
<b>Billing Code:</b>	The sender's billing code.
<b>Sub Billing Code:</b>	The sender's sub billing code.
<b>Company:</b>	The sender's company name.
<b>Address:</b>	The sender's company address (number and street).
<b>City:</b>	The city where the sender's company is located.
<b>State:</b>	The state or province where the sender's company is located.

<b>Country:</b>	The country where the sender's company is located.
<b>Zip:</b>	The sender's company ZIP or postal code.
<b>Phone:</b>	The sender's company phone number.
<b>Fax:</b>	The sender's company fax number.

Clicking **Restore defaults** restores the fields to the values taken from the user's profile. If no value is specified in the profile, or if the field is part of the **Personal Information** section (except for the e-mail), the field is cleared.

### ***The Options Tab***

---


You can specify the fax settings and whether you want to receive notifications in the dialog of the **Options** tab. Refer to the following screenview for a depiction.

Select the **Use default options** option to use the fax settings specified in the profile associated with your user account.

Select the **Use custom options** option to customize the fax settings. If you select this option, you can enter data in the following fields:

<b>Priority:</b>	Specifies the fax priority (Low or Normal). The default is Normal.
<b>Number of retries:</b>	Specifies the maximum number of times the gateway tries to transmit the fax before failing. The default is 3; the maximum is 99.
<b>Resolution:</b>	Specifies the fax resolution (High or Low). The default is High.
<b>Notify on success:</b>	Check this box to issue a notification after a fax is sent successfully.
<b>Notify on failure:</b>	Check this box to issue a notification when the sending of a fax fails.

**Broadcast Notification:** Check this box to enable the reception of a single notification (summary) after a broadcast fax emission.

 **Note:** Enabling this type of notification does not suspend the other outgoing fax notifications. If you leave the **Notify on success** and **Notify on failure** boxes checked, you will still receive notifications for all the fax communications inside the broadcast.

**Delay Transmission Until:** Check this box if you wish to delay the sending of the current fax, then enter a date and time for the delay.

Clicking **Restore defaults** restores the fields to the values taken from the user's profile. If no value is specified in the profile, the field is cleared.


## ***Creating and Sending a Fax***

---


To use this feature, you must have faxing rights.

To create and send a fax using the **Compose** feature of the Web access, perform the following steps:

1. Click **Compose**.
2. In the **Compose** tab, enter the **Name**, **Company** and **Fax Number** of a recipient.

 **Tip:** If you need to add a DTMF code (such as an extension number or a long-distance code), you can enter it after the fax number, preceded with one or several pauses (comma or letter *p* – not case sensitive).

For example: (514) 222-3333p1234 (equivalent to (514) 222-3333,1234).

 **Note:** If you need to add (and manage) more than one recipient, refer to [Adding One or More Recipients to a Fax](#) on page 117.

The **Name**, **Company** and **Fax Number** fields offer automated entries from the Web Phone Book when you start to enter a value.

3. Enter the **Subject** of the fax.
4. Enter the actual text of the message in the **Comment** section.
5. If you need to use a specific cover sheet, select a cover sheet in the **Cover Sheet** drop-down list, or select **None** if you do not wish to append one to the fax.
6. If you want to join an attachment to the fax, refer to [Adding One or More Attachments to a Fax](#) on page 117.
7. If you need to modify the sender and company information or the settings for the current fax, refer to [Sender and Company Information Tab](#) on page 113 and [The Options Tab](#) on page 115.
8. Click the **Submit** button, located above the **Compose** feature's tabs.

When submitting a fax the Web Client confirms the sending status with a Broadcast Id confirmation similar to the following:



**Fax submitted**

Fax successfully queued for delivery; Broadcast ID is 8B91A850-8E08-4518-989D-EB496ACCC936-11-BR

**New Recipients**

The following recipients do not exist in your personal contacts, please check the contacts you want to add:

John Smith, 514-123-4567

Ok

- Note:** You can add a contact to your personal phone book when a fax is sent. However, this action can be configured beforehand. For more information see [Configuring Automated Adding of Contacts](#) on page 127

### ***Adding One or More Recipients to a Fax***

---

How to add one or more recipient to a fax being sent, and how to manage the list of recipients.

This procedure takes in consideration that you are preparing a fax before sending it. For more information about sending a fax, refer to [Creating and Sending a Fax](#) on page 116.

To add one or several recipients to your fax:

1. In the **Compose** tab, enter the **Name**, **Company** and **Fax Number** of a recipient.
2. If you need to add more than one recipient, click the **More recipients** button.  
A new section appears to the right of the **Recipients** fields.

Add	Name	Company	Fax Number
Edit			
Remove			

3. Enter the recipient's information in the information fields then click **Add** when done.
4. Repeat this operation for every fax recipient.
5. If you need to modify the information of a recipient already in the list:
  - a) Select a recipient in the list and click **Edit**.
 

**Note:** If the fields already contain information, clicking **Edit** will erase this information.

The information of the selected recipient appears in the corresponding fields on the left and the recipient disappears from the list.
  - b) Modify the information in the fields and click **Add** to validate.  
The modified recipient appears again in the list.

6. If you need to delete a recipient from the list, select a recipient then click **Remove**.

### ***Adding One or More Attachments to a Fax***

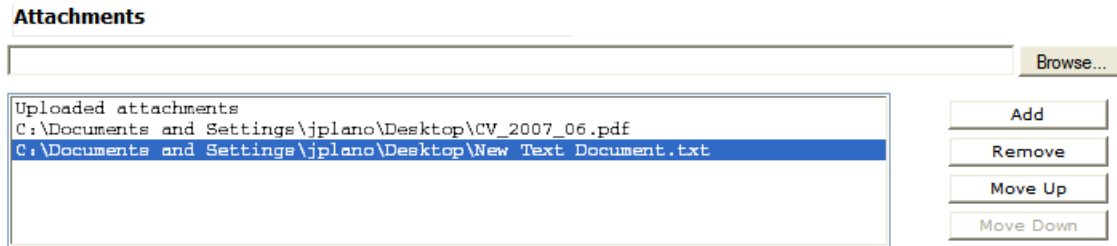
---

How to add one or several attachment to a fax being sent.


This procedure takes in consideration that you are preparing a fax before sending it. For more information about sending a fax, refer to [Creating and Sending a Fax](#) on page 116.

To add one or several attachments to your fax:

1. Click **Browse** and select a file to upload to the fax.
2. If you need to add more than one attachment, click the **More attachments** button. A new section below the **Browse** field opens.



3. Click **Browse** and choose the file you wish to upload to the fax then click **Add**.
4. Repeat this operation for every fax attachment.
5. Use the **Move Up** and **Move Down** buttons to modify the order of the attachments.
6. If you need to delete an attachment from the list, select an attachment then click **Remove**.

 **Note:** You can also add attachments by using the Web Fax Composer Printer. See [Attaching Documents to a Fax by Using the Web Fax Composer Printer](#) on page 121.

Although the Web Fax Composer Printer opens the Web Access Compose Feature, it can be used with the Web Access already open and will add attachments to the current fax. It will do so even if there are already attachments in the current fax.

## Delegation

---

XMediusFAX gives the users the ability to delegate other XMediusFAX users for accessing their fax box, for example while they are on vacation.

As long as the Administrator has enabled the Delegation feature (please refer to your Fax Server administrator if not), two types of users roles can be defined in the Delegation context: the Owner and the Delegates.

### Owner

This term defines all XMediusFAX users who have access to their own fax box via the Web Client interface. As Owners, they have access to all features that the Administrator has granted them to use (see [Overview](#) on page 89).


An Owner can delegate one or several XMediusFAX users (called here Delegates) for accessing his/her fax box. The Delegates access is configurable (many options between full and very restricted access) and can be different from one Delegate to another.

For more information about Delegates management, see: [Adding and Managing Delegates](#) on page 119.

### Delegates

This term defines all XMediusFAX users who have access to their own fax box via the Web Client interface and who have been selected by another XMediusFAX user (called here the Owner) to access precisely this user's fax box, in a Delegation context.

Depending on the specific permissions that the Owner gave to a Delegate, this Delegate may have full powers or restricted access regarding the Owner's fax box and its features.

 **Note:** XMediusFAX users can be the Delegate of multiple Owners.

For more information about the interface access as Delegate, see: [Accessing the Interface \(of Another User\) as Delegate](#) on page 120.

### ***Adding and Managing Delegates***


---

The following procedure assumes that:

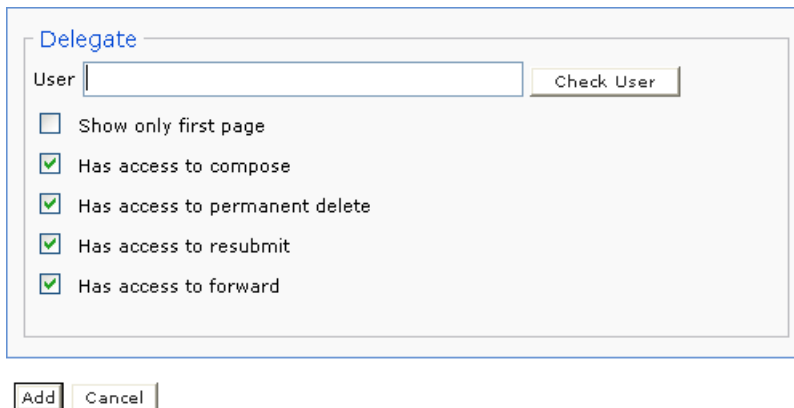
- You are already logged in the Web Access interface, under your own fax box.
- Your Administrator enabled the Delegation feature.

To add a Delegate and configure the permissions for the access to your fax box:


1. Click the **Options** link in the top-right corner of the interface. The **Options** screen appears.
2. Select the **Delegation** tab.




3. Click **Add**.




4. In the **User** field, start to type the user account name of the person you wish to add as Delegate, then click **Check User**. Depending on the first letters you entered, the system may complete the name in the field or allow you to select an item among a list of available users whose account name start with these letters.

 **Important:** It is recommended to use the **Check User** button in order to verify if the entered user account name exists, otherwise you will not benefit from the expected delegation.

 **Tip:** If you are not able to find or remember existing user account names, you can still leave the **User** field empty and simply click **Check User** to access the list of all available users.

5. Setup the delegation permissions you wish to give to this specific Delegate:

Option Name	Description	Default
<b>Show only first page</b>	Restrains the Delegate to view no more than the first page of any fax in your box.	Disabled
<b>Has access to compose</b>	Allows the Delegate to compose faxes from your box.	Enabled
<b>Has access to permanent delete</b>	Allows the Delegate to delete faxes from the <b>Deleted</b> views of your box.	Enabled
<b>Has access to resubmit</b>	Allows the Delegate to resubmit faxes from your <b>Outbound History</b> .	Enabled
<b>Has access to forward</b>	Allows the Delegate to forward faxes from your <b>Inbound History</b> .  <b>Note:</b> All forwarding operations will be tagged with the name of the Delegate in the <b>Routing History</b> of the concerned fax (see <a href="#">Viewing the Inbound Fax Details</a> on page 95).	Enabled

6. Click **Add**.

The new Delegate appears now in the list of **Delegates** and the targeted user is now able to access your fax box according to the permissions you selected.

You can now add and configure other Delegates if needed, or manage the list of existing ones using the **Edit** and **Remove** buttons.

### ***Accessing the Interface (of Another User) as Delegate***

---

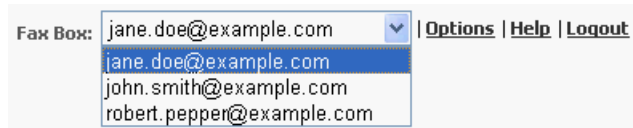
The following procedure assumes that:

- Your Administrator enabled the Delegation feature.
- At least another XMediusFAX user has added you as Delegate.

To access the fax box of another user as Delegate:


1. Logon into the Web Access interface with your own account.


In the top-right corner of the interface, you should see the **Fax Box** drop-down list, allowing you to switch between your fax box (at the top of the list) and the fax boxes of all users who added you as Delegate.



2. Select a user in the drop-down list.

You are now in the fax box of the selected user, and you can act there according to the specific permissions this user gave to you as Delegate.

 **Note:** Delegation permissions that you may have are only for faxing features (see the list of options in section: [Adding and Managing Delegates](#) on page 119). You will never have access to the **Options** section of another fax box than your own.

 **Tip:** To go back to your own fax box, just select your account name in the **Fax Box** drop-down list.

## Attaching Documents to a Fax by Using the Web Fax Composer Printer

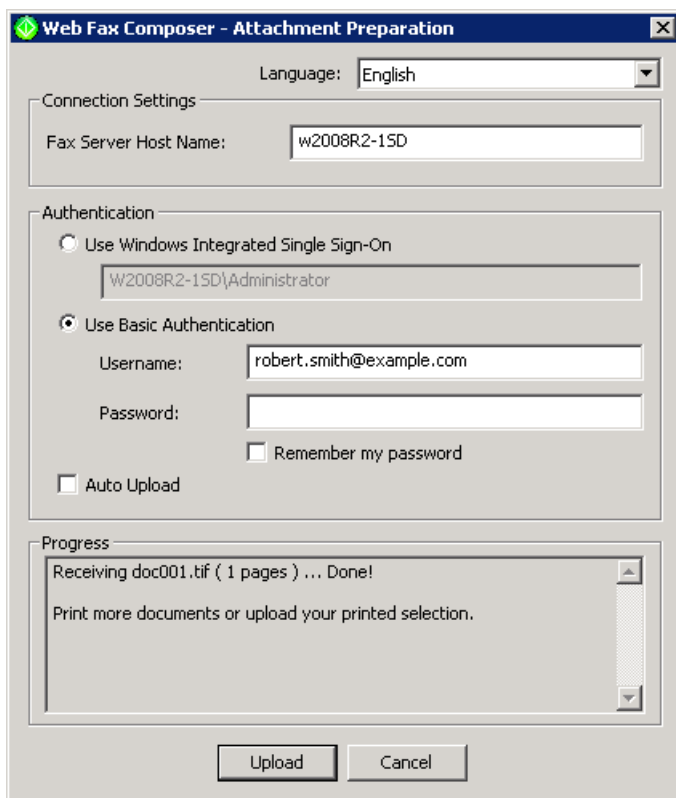
If the Web Fax Composer Printer is installed on your computer, you can send faxes via the Web Access interface by printing documents from any Windows application.

**Note:** The Web Fax Composer Printer can be installed through the Client Installation Package. See [Link to Download XMediusFAX Installer for Windows Client Applications](#) on page 92.

When using the Web Fax Composer Printer, the document is converted into a TIFF file and attached to a fax in the Web Access **Compose** feature.


1. Open the document to be faxed with the appropriate application.
2. Access the print option of the application.
3. Select the **Web Fax Composer** printer in the list of available printers.
4. Print the document.

The document is transformed into a TIFF file and the **Attachment Preparation** window opens. The TIFF file is visible in the **Progress** box.



5. Enter your connection and authentication settings (if not already set).  
For more information, see [Connection and Authentication Settings](#) on page 122.
6. Click **Upload**.  
A Web Access Interface session opens in composition mode with your TIFF file added as an attachment.

**Note:** If a fax was already in preparation in the web interface, the TIFF file is attached to this fax.

 **Note:** To upload more than one attachment at a time and for upload automation, see [Upload Options](#) on page 122

7. To complete fax composition and send your fax in Web Access, see [Compose Feature](#) on page 112.


## ***Upload Options***

---


### **Auto Upload Option**

If you usually upload only one attachment at a time to the Web Fax Composer, you can check the **Auto Upload** box. When you print from your Windows application, the **Attachment Preparation** window will open and will start uploading immediately.

The **Cancel** button will then become a **Close** button which will include a 10-second countdown once the TIFF attachment has been uploaded. You can click **Close** at any time to close the window.

 **Note:** When the **Auto Upload** option is activated, this prevents the user from modifying the settings (connection, authentication, language). To disable it, uncheck the box during the 10-second delay the next time you use the Web Fax Composer printer.

### **Uploading More than One Attachment**

 **Note:** The **Auto Upload** box must be unchecked to use this method.

Once one file has been transformed to a TIFF file in the **Attachment Preparation** window, do not click **Upload** at this time. Return to your Windows application or use any other Windows application to print another file through the Web Fax Composer Printer. The TIFF file will be added in the **Progress** box of the **Attachment Preparation** window.

Repeat this as many times as required until all the attachments you require are in the **Progress** box, then upload to the Web Fax Composer. All the attachments will be present in the Web Access **Compose** feature.


 **Note:** If you want to upload an additional attachment after the upload, print and upload the file and it will be simply added to the list of attachments in the Web Access **Compose** feature.

## ***General Settings***

---

### **Interface Language Selection**


Use the drop down list to instantly change the language used in the **Attachment Preparation** window.

 **Note:** The default setting is **Use My Regional Settings**.

### **Connection and Authentication Settings**

The connection and logon settings are mandatory for being able to use the feature.

### **Connection Settings**

Field	Description
<b>FaxServer Host Name</b>	<p>The name (or URL) used to reach the Fax Server host.</p> <p> <b>Attention:</b> This value should have been correctly set (or communicated) by your administrator while installing the feature; you should not have to change it.</p> <p>Acceptable syntax: [{http https}://]&lt;ServerName_or_IP&gt;[:&lt;Port&gt;]</p> <p>In HTTPS context, &lt;ServerName_or_IP&gt; must be the Common Name of the Fax Server (and not its IP address).</p>

### Authentication

Option	Description
<b>Use Windows Integrated Single Sign-On</b>	If you wish to log in automatically with your current Windows Account.
<b>Use Basic Authentication</b>	If you wish to log in using your faxing account registered by the Fax Server ( <b>User Name</b> and <b>Password</b> – with the option to remember your password).

## Web Phone Book

---

A Web Phone Book stores contact information about recipients to whom you are addressing faxes. This information can include a contact's name, fax number, address, company and business address, etc.

There are two types of Phone Books:

- Public (corporate) Phone Book: assigned to you through your profile (accessible to all users having this profile), and managed only by administrators.
- Personal (private) Phone Book: accessible and manageable only by yourself.

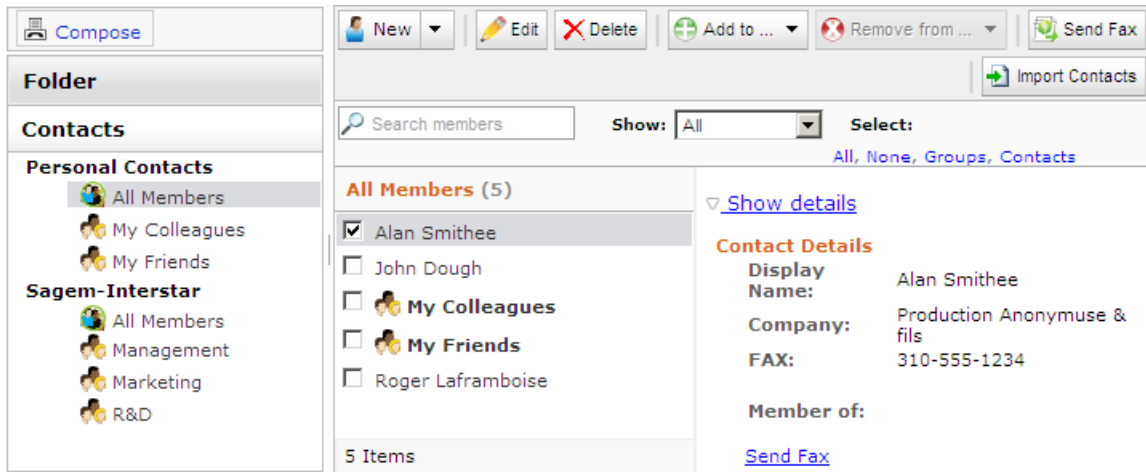
This chapter explains how to:

- Access and browse Phone Books.
- Manage contacts and groups in your personal Phone Book.
- Send faxes from Phone Books.

### Access and Browse the Phone Books

---

To access the Phone Book management interface, login to the Web interface (see [Logging into the Web Access](#) on page 89) and click the **Contacts** button located at the bottom left.



The interface is divided in three sections. The left column displays the list of available Phone Books (and their groups) as the center column allows to browse through the contacts of a selected group. The right column allows to view the information and details of a selected item.

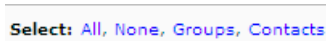
**Note:** A condensed version of the information is displayed in the right section. Clicking **Show full details** will make available the complete information of the selected item.

### The Web Phone Book Search Tool



You can search for items through the search bar located below the option bar by entering letters in the **Search members** field. A search can be filtered by selecting a value in the **Show** dropdown list.

### The Web Phone Book Quick Selection Tool



If you need to quickly select multiple items, use the links available in the **Select** bar.

## Contacts Management

---

Within your personal Phone Book, you can:

- Create and manage your own contacts and groups
- Copy contacts from a public Phone Book to your personal Phone Book
- Import contacts from external sources
- Configure the automated adding of contacts

This section shows how to perform these actions.

### Creating a Contact or Group

---

#### Creating a Contact

To create a contact, click .




Apply Cancel Show Details >>

**Contact Details**

Display Name\*

Company

FAX\*

 **Note:** Only the **Display Name** and the **FAX** number are mandatory. If you wish to add more information for the created contact you can access to a more complete input form by clicking **Show Details >>**:

Apply Cancel << Hide Details

General Organization Information

**Contact Name**

Display Name\*

**Contact Numbers**

Phone

Pager


Cellular

FAX\*

E-mail

Click **Apply** to validate.

### Creating a Group

To create a group, select **Group** by using the arrow beside the  button.

Apply Cancel



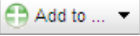

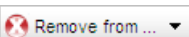
**New Group**

Name\*:

Enter a **Name** for the group and click **Apply** to validate.

### Managing Contacts and Groups

Here is a list of the available options offered to manage contacts and groups in your personal Phone Book:

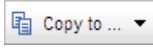
Button	Description
 Edit	Edits item details.
 Delete	Deletes the selected item.
 Add to ... ▼	Adds the selected item to a group.  <b>Note:</b> You can add a group to another group.
 Remove from ... ▼	Removes the selected item from a group.

- 👉 **Note:** All the actions above can be performed on multiple selections (except **Edit**). However, they are not available on public Phone Book items, as you can manage only your own contacts.

### ***Copying Public Contacts to Your Private Contacts List***

---

It is not possible to modify a contact in a public Phone Book. However, you can copy contacts from a public Phone Book to your personal Phone Book in order to manage it as your other personal contacts.

For this, select an item, click  and select **Personal Contacts**.

- 👉 **Note:** This action can be performed on multiple selections.

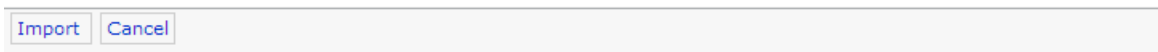
### ***Importing Contacts From an External Source***

---

You can import an external contact list to your personal Phone Book by using a CSV file.

1. Select – in your personal Phone Book – the **All members** node or a group in which you wish to import the external list of contacts.

2. Click .



#### **Import Contacts**

Only the CSV file format (Comma Separated Values) from the services listed below is supported for importing contacts.

Select the service you are importing contacts from:

- Microsoft Outlook (using CSV) - EN
- Outlook Express (using CSV) - EN
- Lotus Notes (using CSV) - EN
- Microsoft Outlook (using CSV) - FR
- Lotus Notes (using CSV) - FR
- Microsoft Outlook (using CSV) - DE
- Lotus Notes (using CSV) - DE

Choose the file to import

No file chosen

Select the option for the contacts in the CSV file that may already exist:  ▾

3. Select the type of application from which the contacts list to import was exported as a CSV file (MS Outlook, Outlook Express or Lotus Notes).

- 👉 **Note:** To use the **Lotus Notes (using CSV)** option, the CSV file must have been exported from Lotus Notes version 8.5+, with the default parameters: all properties, with headers.

4. Browse for the file to import.

- 👉 **Note:** The file to import must be a CSV file exported by the application type selected above.

5. Select the option for contacts of the CSV file that would already exist in the Phone Book:

- **Merge:** The information contained in the imported contact will overwrite the existing contact.
- **Add:** A new contact will be created.
- **Ignore:** The imported contact will be ignored.

6. Click **Import**.


The contacts are now added to your Phone Book.

## ***Sending a Fax From a Phone Book***

---

To send a fax directly from a Phone Book:

1. Select a contact or group.

 **Note:** You can use here multiple selections.

2. Click .

The **Compose** screen appears and the selected contacts are automatically added to the **Recipients** section.

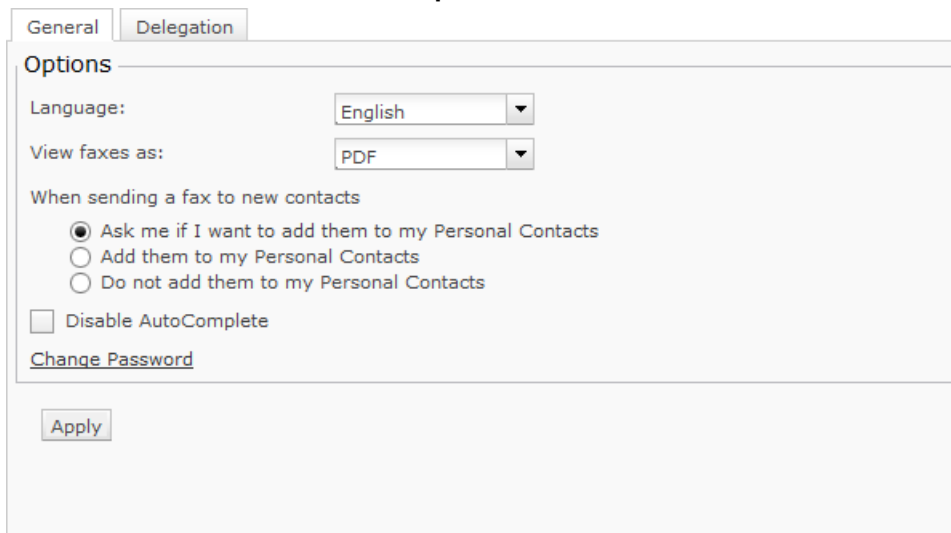
3. Compose the fax by following the usual procedure: [Creating and Sending a Fax](#) on page 116

## ***Configuring Automated Adding of Contacts***

---

A feature allows you to add new fax recipients to your Phone Book after a fax is sent. The way this feature works can be configured.

1. In the main screen of the Web Interface, click **Options**.



2. Select an adding option in **When sending a fax to new contacts**:

- **Ask me if I want to add them to my Personal Contacts**
- **Add them to my Personal Contacts**
- **Do not add them to my Personal Contacts**

3. Click **Apply**.



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***User Guide***  
***Noncontractual document***



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