

**OPENTEXT**

**OpenText RightFax 10.6 Feature Pack 2**

**Web Client**

**User Guide**

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**Edition**

OpenText RightFax 10.6 Feature Pack 2 Web Client

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## Web Client home page

The **RightFax Folder - *foldername*** page is the page from where you manage your faxes and those of users for whom you act as a delegate. The left pane shows the available folders, the right pane the faxes within the selected folder. On [small mobile devices](#), some options are accessible via a menu rather than a toolbar, while others are not available at all.

The following flags are used in the list of faxes:  = received,  = sent,  = printed,  = OCRred,  = converted to PDF,  or  = sent or received fax forwarded to another RightFax user. In addition, flags can indicate the document type:  = certified,  = SMS,  = e-transport,  = routed to e-mail.

Regularly refresh the display to ensure that the faxes listed are those currently stored on the fax server.

### Selecting a mailbox if you are a delegate

Under **Users**, click **username**. When you select a delegate's mailbox, the owner's username appears at the top of the folder list and the folders are highlighted in color.

## Sending faxes

### Create and send a fax

Faxes are created in the system folder **Main** unless you select a custom folder before creating a new fax.

1. Click **New Fax**.
2. On the [Create/Edit Fax](#) page, enter the information for the fax. Usually you must enter at least the

recipient's name, the destination type, and a fax number or e-mail address.

3. Click **Send**. If necessary, fill in any missing information.

### Forward or route a fax

When a fax is forwarded, a copy of the fax is sent to the recipients while the original remains in the sender's mailbox. When a fax is routed, the original fax is sent to the recipients and removed from the sender's mailbox.

#### • To forward a fax to a fax number or E-mail address

1. Open the fax, and then click **Forward to Fax**.
2. On the **Create/Edit Fax** page, enter the information for sending the fax, and then click **Send**. To forward the fax to multiple recipients, send it to phone book group. For more information, see [Sending a fax](#) on [page 7](#).

#### • To forward a fax to another RightFax user on your network

1. Open the fax, and then click **Forward to User**.
2. **User to forward to**. You can enter up to five RightFax IDs separated by commas. You can type them or select them from a list.

To select the users from a list, click **Search User List**. In the **Search for user by name** box, enter a few letters from the name or leave blank to search all users, and then click **Search**. Select a user ID by clicking the icon its left.

3. **Notes to place in fax history record**. Enter any

notes you want to add to the document history.

4. Click **Forward Fax** to send the fax.

- **To route a fax to another RightFax user on your network**

1. Open the fax, and then click **Route to User**.
2. **Destination users.** You can enter up to five RightFax IDs separated by commas. You can type them or select them from a list.

To select the users from a list, click **Search User List**. In the **Search for user by name** box, enter a few letters from the name or leave blank to search all users, and then click **Search**. Select a user ID by clicking the icon its left.

3. **Notes to place in fax history record.** Enter any notes you want to add to the document history.
4. Click **Route Fax** to send the fax.

### Send a fax held for preview

Open the fax, and then click **Release Fax**.

## Viewing a fax

### Save the fax in PDF or TIFF format

Open the fax, and then click  or  respectively.

### View the fax history

Open the fax, and then click **Fax History**. The history typically includes the following events:

- When the document was sent.
- The result of the send attempt.


- When the document was received.
- When the document was manually routed or forwarded.
- When the document was printed.
- When the document was converted to text using OCR.


## Annotating a fax

### Draw lines, add rectangles, or text

You can add text, draw freehand lines, straight lines, plain rectangles, and solid rectangles.

1. Open the fax, and then click a drawing tool or the add text tool.


**Note** Small mobile devices include only the freehand line () tool

2. Move to the part of the page where the annotation should appear.
3. Add annotations, using one or several tools.
4. Click  to save the annotations. The annotations become part of the fax.

### Delete annotations not yet saved

Click  followed by .

### Activate the annotation tools if they are disabled

Click  and then click a tool.

## Using your mailbox

### Customize your fax list

### To customize your fax list by applying filters

1. Click **Search**.
2. On the [Custom Search](#) page, define the criteria by which to filter the list, and then click **Search**.

### To remove the filters

- Click **Close Search**.

### Delete faxes

#### To delete faxes from the fax list

1. Select the check boxes next to the faxes to delete, and then click **Delete**.
2. Click **OK**.

#### To delete a fax while viewing it

Open the fax, and then click **Delete**.

### Organize your faxes in folders

Your mailbox includes the system folders **Main**, **Trash**, and **All**. In addition, you can define custom folders, including custom folders within custom folders. The system folder **All** is a view of all your faxes, including those in **Trash**.

#### • Create a custom folder

1. On the **Folder** menu, click **New Folder**.
2. In the **Parent Folder** list, select where to create the folder:
  - **None**. Select to create the folder on the level of the system folders.

- **Custom folder name**. Select to create the folder within this custom folder.

3. **New Folder Name**. Type a name for the folder.
4. Click **OK**. The folder appears in the folder pane.

#### • Rename a custom folder

1. Click the custom folder.
2. On the **Folder** menu, click **Rename**.
3. **New Folder Name**. Enter the new name.
4. Click **OK**.

#### • Delete a custom folder

1. Click the custom folder and make sure it is empty.
2. On the **Folder** menu, click **Delete Folder**.
3. Click **OK**.

#### • Move a fax into another folder

1. Open the fax, and then click **Move to Folder**
2. In the list, select the destination folder, and then press **OK**.

## Maintaining mailbox settings

In addition, from anywhere in the Web Client, you can do any of the following:

### Add phone book entries

**Note** This option is not available on small mobile devices.

1. On the **username** menu, click **Phonebook**.
2. On the [Phonebook](#) page, define the phone book

entries.

### Change your password

1. On the **username** menu, click **Settings**.
2. At the bottom of the User Configuration page, click **Change Password**.
3. On the [Change Password for username](#) page, change your password, and then click **Save**.

### Grant delegate access to other users

**Note** This option is not available on small mobile devices.

1. On the **username** menu, click **Delegates**.
2. On the [Delegates](#) page, add delegates and define permission roles for future use.

### Set user options

You can set a variety of user options with which to customize your use of the Web Client mailbox.

1. On the **username** menu, click **Settings**.
2. On the [User Configuration of user](#) page, set your preferences, and then click **Save**.

**Note** To access the previous page, use **Close** and **Cancel**, not your Web browser's Back function.

To log out of the Web Client, on the **username** menu, click **Logout**.

## Sending a fax

You enter all information for sending a fax on the **Create/Edit Fax** page.

- To open this page, on the Web Client home page, click **New Fax**. The page also opens when you forward a fax to another fax number or e-mail address (Forward to Fax).

### Enter the destination

You can select the destination from your phone book or enter it manually. To enter multiple recipients, select a phone book group. Under **To**, do one of the following:

- To select a phone book entry, click **Phonebook Search**. In the phone book list, click the entry. The recipient's addressing information appears on the Create/Edit Fax page. If the selected entry is a phone book group, the group ID appears in the Name field.
- To manually enter the destination, do the following:
  - Name**. Enter the name of the recipient.
  - Destination Type**. Select Fax Number or E-mail Address.
  - Destination**. Enter the fax number or e-mail address.
  - Certified Delivery**. Select for e-mail destinations to send a link to the fax instead of sending the fax. You will be notified when the fax has been viewed.
  - Voice Number, Company, City/State**. As needed, enter optional contact information for the recipient.

### Add a cover sheet

1. Under **Cover Sheets**, select the **Use cover sheet** check box.
2. In the **Cover sheet file** list, select **Default** or the name of a specific cover sheet. This option may not be available.
3. To enter notes on the cover sheet, enter up to 21 lines

of text in the text box. Each line can have 69 characters. The text may not include embedded codes or signatures.

### Add attachments

You can attach files that still need to be converted to fax format as well as library documents that have already been converted. The cover sheet and the attachments appear in the Attachments list. .

#### To attach a file

1. Click **Attach File**.
2. Browse to where the file is located.
3. Select the file, and then click **Open**.

#### To attach a library document

1. Click **Attach Library Document**. The Document Library page opens.
2. Click the library document.

#### To move an attachment up or down in the list

The items in the attachments list are added to the end of the fax in the order in which they appear here.

- In the **Control** column, in the row of the attachment, click **Up** or **Down** respectively.

#### To delete an attachment from the fax

- In the **Control** column, in the row of the attachment, click **Delete**.

#### To specify the quality of PDF attachments

- In the **PDF Attachment Type** list, select whether the PDF files consist of **Text** or of **Photos and Images**. If the original is light in color, select **Light**.

#### Enter billing codes

Under **Billing Information**, do one of the following:

- To select a billing code, click **Billing Search**. To search by the description, click **Description**, otherwise click **Account** or **Matter**. Enter the characters by which to search, and then click **Search**. Click a billing code to select it.
- To manually enter a billing code, enter the code in the **Account** box, **Matter** box, or both.

#### Change transmission options for this fax

At the top of the page, click **More Options**. Any changes you make apply to the current fax only. The default options are set by your system administrator.

- **Delay Send**. Select to postpone transmission to a later time or date, and then enter at what **Hour, Minute, Month, Day, and Year** to send the fax. Normally outgoing faxes as soon as a phone line becomes available.
- **Use fine mode**. Select to send the fax using fine resolution (200 x 200 dots per inch).
- **Hold for Preview**. Select to review the final version of the fax before sending it. The fax will remain in your mailbox with the status "Held for Preview" until you view and release it.
- **Create PDF image**. Select to send each attachment as a PDF file instead of a TIFF file (the standard image format



used for faxes). To create PDF files, you must purchase and enable the PDF Module. To send PDF files as faxes, you must purchase and enable the SecureDocs module.

- **Priority.** To change the priority of the fax within the queue of waiting faxes, select **High**, **Normal**, or **Low**. The high priority option may not appear. Your administrator controls whether it is available.
- **Form Type to Use.** Select a form with which to overlay the fax pages.
- **Delete After Send.** Select **On Success only** or **Always** to automatically delete the fax after transmission. Otherwise keep the default of **None**.
- **From.** Enter sender information to be included on the cover sheet, such as enter your name, fax number, phone number, and other contact information.
- **Verify Receiving Fax Machine.** Select the check box to send the fax only after the remote ID of the intended recipient's fax machine or server has been matched to the ID you specify here.
  - **ID to Verify,** enter the remote fax ID. You can use the characters asterisk (\*) and question mark (?), where asterisks represent zero or more characters or digits and question marks represent exactly one digit or character each.

## Applying filters to customize the fax list

You can define filters to limit which faxes appear in your fax mailbox.

- On the Web Client home page, click **Search**. The **Custom Search** page opens.

### Destination filters

To limit the faxes displayed by information about the fax destination, enter one or more of the following criteria:

- **Destination.** A destination fax number to display all faxes sent to this number.
- **Name.** A recipient name to display all faxes sent to this recipient.
- **General Voice Number.** A general voice number to display all faxes sent to a destination with this voice number
- **Company.** A company name to display all faxes sent to a destination with this company name.
- **City/State.** City/state information to display all faxes sent to a destination with this city/state information.
- **Account.** An account billing code to display all faxes sent to a destination with this account billing code.
- **Matter.** A matter billing code to display all faxes sent to a destination with this matter billing code.
- **Comment.** A comment to display all faxes that include this text in the comments line.

### General filters

To limit the faxes displayed by general information, enter one or more of the following criteria:

- **CSID.** A Calling Subscriber Identification (CSID) to display faxes that match this CSID.

- **ANI.** An Automatic Number Identification (ANI) to display faxes that include this ANI.

### Start/End Date/Time Filters

**Start Date/Time** and **End Date/Time.** Enter a start and end date and time respectively to display faxes sent or received between these dates.

### User and Group Filters

- **Additional Users.** Enter the names of users for whom you are a delegate or have administrative access to display faxes from the specified users.
- **Additional Groups.** Enter group ID or IDs for which you have administrative access to display faxes from these groups of users.
- Select any of the following check boxes:
  - **Include all users I have delegate or administrative access to.** Display faxes from all user accounts for which you are a delegate or have administrative access.
  - **Include my own faxes.** Display your own faxes.
- **Which folder do you want to filter by.** To only show the faxes in a specific folder, select the folder.

### Workflow filters

Select one or more of the following check boxes:

- **Received.** Display received faxes.
- **Sent.** Display sent faxes.
- **Viewed.** Display faxes that you have viewed.
- **Printed.** Display faxes that you have printed.

### Status filters

Select one or more of the following check boxes:

- **Information Incomplete.** Display faxes that are waiting for fax conversion.
- **Waiting for Conversion.** Display faxes that are waiting to be converted to fax format.
- **In Conversion.** Display faxes that are currently in conversion to fax format.
- **Sending.** Display faxes that are currently being transmitted.
- **OK.** Display faxes that have sent without errors.
- **Aborted with error condition.** Display faxes that have sent but reported one or more errors.
- **Error condition - will retry.** Display faxes that have failed to send due to errors, but will be retried after a short interval.
- **Waiting to be Sent.** Display faxes that are converted to fax format and are waiting to enter the transmission queue.
- **Scheduled to be Send.** Display faxes that are converted to fax format and are waiting in the queue to be sent.
- **Held for Preview.** Display faxes that are waiting in your mailbox for your review before being sent.
- **Waiting for Attachment.** Display faxes that are waiting to pick up a file attachment.
- **Attention Status.** Display faxes that are waiting to send because some attention is required.
- **Printing.** Display faxes that are currently being automatically printed.

- **Queued for Printing.** Display faxes that are waiting to enter the print queue.
- **OCR in Progress** Display faxes that are being converted to text using Optical Character Recognition (OCR) technology.
- **Queued for OCR** Display faxes that are waiting to be converted to text.
- **Validating.** Display faxes that are waiting for approval by a supervisor before being sent.
- **Needs Approval.** Display faxes that are waiting for approval by a supervisor before being sent.
- **Duplicate.** Display duplicate faxes.
- **Thermal Record.** Display faxes that have been manually recorded using a conventional fax machine.

### Fax Delivery filters

Select one or more of the following check boxes:

- **Faxes.** Display faxes that were sent to fax numbers.
- **E-mails.** Display faxes that were sent to email addresses.
- **SMS.** Display faxes that were sent to SMS numbers.
- **Certified Delivery.** Display faxes that were sent using Certified Delivery.

## Adding delegates

Depending on your user permissions you may be able to give other users on the network access to your mailbox at a level of access you specify.

This option is not available on small mobile devices.

### Add other users as delegates

1. Click **Delegates**.
2. Click **Add Delegate**.
3. **User(s) to add as delegates.** You can type the RightFax IDs or select them from a list. You can enter up to five IDs separated by commas.

To select the users from a list, click **Search User List**. In the **Search for user by name** box, enter a few letters from the name or leave blank to search all users, and then click **Search**. Select a user ID by clicking the icon to the left of it.

4. Verify that the correct user IDs appear in the **User(s) to add as delegates** box, and then click **Add Delegates**.
5. In the **Role** box, specify the type of permissions you want to grant to the selected users. When you select a role, the permissions for that role are automatically selected.
6. To customize the permissions for the selected delegates, in the permissions list, select and clear the permissions check boxes as needed.
7. Click **Save Selected**.

### Remove delegates

1. Click **Delegates**.
2. Select the check boxes next to the delegates you want to remove.
3. Click **Delete Selected**.

### Save custom permissions for future use

1. [Add a delegate](#).

2. In the **Role** box, specify the type of permissions that most closely match those you want to save as a custom role. When you select a role, the permissions for that role are automatically selected.
3. In the permissions lists, select and clear the permissions check boxes as needed.
4. In the **Save custom role as** box, type a name for the role.
5. Click **Save Role**.

## Adding entries to your phone book

**Note** This option is not available on small mobile devices.

You can add individual and group phone book entries if you have user permission to create and edit phone books.

- To open the **Phonebook** page, do one of the following:
  - On the Web Client home page, on the **username** menu, click **Phonebook**.
  - From the **Create/Edit Document** page, under **To**, click **Phonebook Search**.

Published entries are available to other RightFax users on the network. An entry that is not published is private and can only be seen by you.

### To add an individual phone book entry

1. Click **New Entry**.
2. In the **ID** box, enter an identifier. IDs may not include spaces.
3. To make the entry available to other users on your

network, select the **Published** check box.

4. Complete the addressing boxes. Enter at least one fax number or e-mail address. All other boxes are optional.
5. Click **Save**.

### To add a group phone book entry

You can only group fax or e-mail addresses that exist as individual entries in the phone book.

1. Click **New Group**.
2. In the **ID** box, enter an identifier for the group. IDs may not include spaces.
3. To make this group available to other users on your network, select the **Published** check box.
4. In the **Members** box, type the phone book IDs you want pressing ENTER between each ID you add.
5. When you have added all the phone book IDs you want, click **Save**.

## Changing your password

You can change your password on the **Change Password for username** page.

- To open this page, on the **username** menu, click **Settings**, and at the bottom of the User Configuration page, click **Change Password**.

To change your password

1. **Current password**. Enter your current password.
2. **New password**. Enter the new password.

3. **New password confirmation.** Enter the new password again to confirm it.
4. Click **Save**.

## Setting default user options

On the **User Configuration of user** page, you can specify user preferences for using the Web Client mailbox.

- To open this page, on the Web Client home page, click **Settings**.
- To save the settings after making changes, at the top of the page, click **Save**.

### Sending

- **Use Smart Resume**. Select to send only the unsent portion instead of the entire fax if an error occurs during fax transmission.
- **Use cover sheet**. Select to send a cover sheet with your document.
- **Fax Resolution**. Select the resolution at which to send faxes:
  - **Normal**. Select for draft-quality resolution (100 x 200 dots per inch (DPI)) and shorter transmission times.
  - **Fine**. Select for high-quality printed documents (200 x 200 DPI) and optical character recognition (OCR).
- **Cover sheet file**. If you specified to send a cover sheet, you may be able to select a cover sheet. Administrator settings determine if this option is available.
- **Automatic Deletion**. Select if and when faxes will be automatically deleted: **Always**, **Never**, or only if the fax was sent (**On Success**).
- **Priority**. Select the default priority for faxes you send: **Normal**, **Low**, or **High**. You can change the priority on a per-fax basis. Administrator settings determine if the High option is available.
- **Automatic Printing**
  - **Automatically print sent faxes**. Select the types of faxes you want to print automatically, or select **Disabled** to not print automatically:
    - **Both successful and Failed faxes**
    - **Only successful faxes**.
    - **Only failed faxes**.
  - **Printer**. Select a printer for automatic printing.
  - Select the portions of the fax you want to print:
    - **Print cover sheet**.
    - **Print body pages**.
    - **Print fax history**.

You can also print faxes on a per-fax basis using your Web browser's Print function.

## Receiving

Under **Receiving**, make the following definitions:

1. You can enable automatic forwarding of faxes where faxes are forwarded as soon as they are received. under **Automatic Forwarding**, specify the fax machine or user to forward the faxes to:
  - a. **Automatically Forward Faxes**. Select **To Fax Machine** or **To User**.
  - b. **Forward to**. Enter the number or user ID to which to forward.

You can also forward faxes on a per-fax basis.

2. To enable automatic printing of received faxes, select the **Automatically print received faxes** check box, and in the **Printer** list, select a printer.

You can also print received faxes on a per-fax basis using your Web browser's Print function.

3. To enable automatically conversion of received faxes to editable text, select the **Automatically OCR received faxes** check box, and in the text box, enter the application extension with which you want the OCR output to be associated. Do the following to select the text format and page layout for the conversion to text:
  - a. **Format**. Select one of the following text formats: **ASCII** for a plain text file, **Smart ASCII** to approximate the original format, or **RTF** (Rich Text Format) to preserve fonts and formatting.
  - b. **Layout**. Select one of the following the page layouts: **Left Justified** to align the text with the

left margin, **WYSIWYG** to approximate the layout. The coordinates can be specified values, or you can specify a position relative to the current cursor position.

## Notification

Under **Notification**, make the following definitions:

1. Under **Notification Frequency**, specify how frequently you want be receive **Messages about incomplete faxes**, **Messages during fax transmission**, and **Messages about newly received faxes**. For each type of messages, select one of the following:
  - **Never**. Notification for this fax event will not be sent.
  - **Once**. Notification for this fax event will be sent one time only.
  - **Periodically**. Notification for this fax event will be sent periodically until the fax status changes.
2. Under **Enable Transmission Messages**, select the check boxes next to the transmission messages you want to receive: **Error encountered, fax will be retried**, **Error encountered, fax will be abandoned**, **Fax is successfully sent**.
3. To send notifications another RightFax user, select the **Activate Alternate User Notification** check box and in the text box, enter the RightFax user ID of the alternate user. This is useful when you have a delegate or delegates monitor your RightFax Web Client while you are unavailable.

## Default User Information

Under **User Information**, enter the information that should

appear as the sender's information on your cover pages.

You can change the information for each fax. RightFax automatically creates a cover sheet from the information you enter on the Create/Edit Document page.

### **Include public entries from other phone books**

You can add public phone book entries of up to four other users on your network to your phone book list.

Enter the user IDs of the users whose public phone book entries you want to be able to use. If you wish to add private entries as well, you must supply the user's password. See [Adding entries to your phone book](#) on page 12.

### **Set options for deleted faxes**

1. To move faxes you delete into the Trash folder, select the **Use trash folder when deleting** check box.
2. To empty the Trash folder each time you log out of the Web Client, select the **Empty trash on exit** check box.

## Working in your mailbox on a small mobile device

On small mobile devices, some options are accessible via a menu rather than a toolbar, while others are not available at all.

The following options are available in a different location:

- The system folders **Main**, **Trash**, and **All** and any custom folders are on the **Folders** menu on the home page.
- The options **Forward to User**, **Forward to Fax**, **Route**

**to User**, **Fax History**, **Move to Folder**, and **Annotate** are on the **Actions** menu for an opened fax.

The options to add delegates or phonebook entries are not available, nor are annotation tools other than the freehand line tool.

If part of the screen is cut off in landscape view, change to portrait view.