opentext™

OpenText™ Fax

FaxUtil User Guide

Provides conceptual and task-oriented information on how to use OpenText Fax FaxUtil.

Table of Contents

Chapter 1

Getting started

OpenText Fax FaxUtil is the mailbox where you manage your faxes and those for whom you act as a delegate.

- The left pane shows the folders that contain faxes.
- The center pane shows the list of faxes within the selected folder. Flags indicate the action taken on the fax, and status indicators show the current status of the fax.
- The right pane displays a preview of the selected fax when the **Tools** menu is enabled.

Fax flags: ⬆ = sent ⬇ = received, 🖨 = printed, 🔢 = converted to text (OCR), 📕 = converted to PDF, ➥ or ↪ sent or received fax forwarded to another OpenText Fax user. In addition, flags can indicate the document type: 🏅 = certified delivery message, 📱 = SMS message, 📧 = Emailed, 📥 = Fax routed to email.

Status indicators: ◯ = preparing for transmission, ⬤ = transmitted, ⚠ = not transmitted due to error; will be retried, ❗ = not transmitted due to error; will not be retried.

For detailed information about status messages, see "Fax status and error messages" on page 65.

You can force the server to retry sending faxes that are in a yellow or red status. See "Sending faxes" on page 9.

📄 **Note:** If you forget your OpenText Fax password, contact your fax administrator to assign a new one. To change your password, see "Changing your password and default user information" on page 56.

1.1   Showing the most current list of faxes

By regularly refreshing the fax list you ensure that you are looking at the faxes currently stored on the fax server.

To refresh the fax list now:

- Click **Refresh**.

To set the fax list to refresh regularly:

1. On the **Tools** menu, click **Options**.

2. On the **Other Options** tab, select the **Enable automatic fax list updates (secs)** check box, and then specify the number of seconds between the updates.

Chapter 2

Sending faxes

You can create new faxes, forward or route existing faxes, and send faxes you held for preview.

If you are a fax administrator or group monitor, you can also approve or disapprove faxes that need approval. See "Responding to faxes needing approval" on page 11.

For information about broadcasting faxes to a large number of recipients, see the *OpenText Fax - Administrator Guide (FXNET-AGD)*.

2.1 Sending a new fax

1. Select the folder for creating the new fax.

2. Click **New Fax**. The fax gets saved in the **Main** folder.

3. In the **New Fax** window enter the destination—typically required are recipient name, destination type, and a fax number or email address—and as needed, add billing codes, cover sheet notes, and attachments, and specify other processing options. See "Completing the fax information" on page 13.

4. Click **Send**. If required information is missing, do one of the following:

   • To send the fax now, click **Cancel**, fill in the information, and then click **OK**.

   • To fill in the information later and hold the fax in a status of *Information Incomplete* until then, click **OK**.

2.2 Forwarding or routing an existing fax

When you forward a fax, a copy of the fax is sent, and the original fax remains in your mailbox. When you route a fax, the original fax is sent and removed from your mailbox.

To forward to a fax number or email address:

1. Select the fax in the list, and then click **Forward to Fax**.

2. In the **New Fax** window, enter the information for sending the fax, and then click **OK**. See "Completing the fax information" on page 13.

   When forwarding a received fax to a fax number, you can add attachments.

To forward or route to a OpenText Fax user on your network:

1. Select the fax or faxes in the list, and then click either **Forward to User** or **Route to User**.

2. In the **Selected** box, enter the OpenText Fax user IDs separated by commas.

3. To search for users, in the **Search for Users** box do the following:

   a. Enter a full or partial user name or OpenText Fax user ID, and then click **Search**.

   b. Select the user, and then click **Add**. Repeat as needed for multiple recipients.

   indicates if a user account is disabled,   if it is unprotected.

4. In the **Notes added to fax history** box, enter any notes you want to add to the document history.

5. To send the fax, click **OK**.

To forward or route to a delegate:

1. In the left pane, expand **Other Users**.

2. Browse to locate the delegate.

3. In your list of faxes in the right pane, select one or more faxes and do one of the following:

   • To forward the fax, click and drag the fax to the delegate's name in the tree view in the left pane.

   • To route the fax, hold the shift key, and click and drag the fax to the delegate's name in the tree view in the left pane.

2.3   Releasing a fax held for preview

When you release a fax held for preview it is queued to send.

If you created a new fax and selected the **Hold for Preview** option, the fax appears in the fax list with a status of **Held for Preview**.

• To send the fax, right-click the fax in the list, and on the shortcut menu, click **Status**, and then click **Release**.

2.4 Retrying a failed fax

A sent fax that encounters errors during transmission will be retried the number of times configured by your fax administrator. It appears in the fax list with an error status. After the specified number of retries, the server will stop retrying the fax and the fax status changes.

To force the fax server to retry sending a fax:

• On the **Fax** menu, click **Status**, and then click **Update Status**. If the fax was already scheduled to retry, the fax server will retry immediately and not wait for the scheduled interval. If the fax was dropped, it will go back into the send queue on the fax server as though you were sending a new fax.

2.5 Responding to faxes needing approval

A fax requires approval in the following cases:

• The sender's user account permissions require that faxes be approved by a fax administrator or group monitor before sending.

• The sender's delegate permissions for the other user's mailbox require that faxes be approved before sending.

• The fax is blocked by a dialing rule.

📋 **Note:** If the fax is blocked by a dialing rule, only a fax administrator can approve the fax.

To show faxes needing approval:

As a fax administrator or group monitor you can view all faxes needing your approval.

1. On the **List** menu, click **Needing Approval**.

2. On the **List** menu, click **Administrative Mode** to view the contents of all fax mailboxes for which you are a fax administrator or group monitor.

To approve a fax to send it:

1. Show faxes needing approval.

2. Right-click the fax in the list, and on the shortcut menu, point to **Status**, and then click **Approve**.

3. As needed, in the text box, enter text explaining why you approve of sending the fax. The note will appear in the approval record in the fax history.

4. Click **OK**. The fax will be sent.

To disapprove a fax to keep it from sending:

1.   Show faxes needing approval.

2.   Right-click the fax in the list, and on the shortcut menu, point to **Status**, and then click **Disapprove**.

3.   As needed, in the text box, enter text explaining why you disapprove of sending the fax. The note will appear in the denial record in the fax history.

4.   Click **OK**. The fax will not be sent. The sender's mailbox will show the fax with a status of **Fax was disapproved**.

Chapter 3

Completing the fax information

You enter all information for sending a fax in the **New Fax** window.

- To open this window, in the FaxUtil mailbox, click **New Fax**. The window also opens when you click **Forward to Fax** to forward a fax to another fax number or email address.

A bold label indicates that the information is required. If you click **Send** before entering all required information, a message indicates the fields that need to be completed. Click **Cancel** to fill in the missing information. To hold the fax in a status of *Information Incomplete*, click **OK**.

📄 **Note:** Some options may affect the time it takes to generate and send the fax.

3.1 Entering the fax destination

In the **New Fax** window, under **To**, select the destination from your phonebook or enter it manually. Your user account permissions determine if you can enter a destination manually or if you must select from a phonebook.

When sending a fax to an email address, you can send select file attachments in their native format and specify file attachments as alternate body pages that should appear in the body of the email. Depending on optional OpenText Fax modules, you may also be able to:

- Send via **certified delivery**. The fax is sent to a special secure Web site and a message to the recipient's email address that a certified document is available at the link provided. The recipient logs on to the web site to view the fax. Sending via certified delivery requires the SecureDocs module.

- Send a **regular** or an **encrypted PDF image** instead of the regular TIFF image. A regular PDF image is black and white and cannot be edited while an encrypted PDF image is rendered in color as applicable and can be edited. Creating regular PDF images requires the PDF module. Creating encrypted PDF images requires the SecureDocs module.

📄 **Note:** If your user account does not allow sending outbound emails, any fax you send to an email address will fail.

To select a destination from a phonebook:

1. Click **To**, and the **Phonebook** dialog box opens.

2.   Under **Select Recipients**, double-click an entry to add it to the **Current Recipients** list. If you cannot see the entry, type a complete or partial ID in the **Type ID or select from list** box.

3.   Repeat the above step as needed to add multiple recipients, and then click **OK**. The addressing information (fax, email, or SMS) associated with the selected entry or entries appears in the **To** line of the New Fax window. If you selected multiple entries, the number of fax recipients appears as fax(*n*), e-mail(*n*), or SMS(*n*) where *n* is the number of recipients.

To enter a fax number destination:

1.   In the **Name** box, enter the name of the recipient.

2.   Click the **Fax** shortcut menu, and then select **Fax**.

3.   In the **To** box, enter the fax number. You can enter the number with or without hyphens, parentheses, or spaces.

     To use post-dialing, enter an ampersand (&) followed by a sequence of DTMF digits. The post-dial string can include PSTN telephony characters such as 0-9, #, *, and a comma, but not p, t, w, and !. The digits will be dialed as soon as the SR140 receives a SIP 183 or SIP 200 response code or a H323 message from the gateway.

     > **Note:** The **Quick Search** feature can display a maximum of 250 entries when searching from the **To Fax** field in FaxUtil. Use the search options in **Phonebook** to find and select a fax number.

4.   To enter optional contact information for the recipient, click the **More** button. In the **More Fax Addressing** dialog box, under **To**, you can enter a voice number, company, city, or state.

To enter an email destination:

1.   In the **Name** box, enter the name of the recipient.

2.   Click the **Fax** shortcut menu, and then select **E-mail.**

3.   In the **To** box, enter the email address.

4.   To enter optional contact information for the recipient, click the **More** button. In the **More Fax Addressing** dialog box, under **To**, you can enter a voice number, company, city, or state.

3.2 Entering notes to appear on the cover sheet

You can add notes that will appear on the cover sheet of the fax.

When you send to an SMS number, the recipient will receive only the text from these cover sheet notes.

To add notes to the cover sheet:

• In the **Message** box, type the text that should appear on the cover sheet of the fax. You can enter 21 lines of text. SMS text is limited to 160 characters.

3.3 Attaching files or library documents

You can attach the following types of documents to a fax:

• Files that need to be converted to fax format.

> **Note:** To broadcast a fax to a large number of recipients quickly, attach library documents instead of files.

If sending a file to an email address, you can send it in its native format instead of fax format.

• Library documents that are already converted.

• Documents from a TWAIN32-compliant scanner.

The attachments are appended after the cover sheet in the order shown in this list. You can change the order until the fax is submitted.

To attach a file

1. Drag and drop the file, or click .

2. Browse to where the file is located.

3. Select the file, and then click **Attach**. The file appears in the list of attachments.

To attach a library document

1. Click .

2. Click the library document, and then click **OK**. The library document appears in the list of attachments.

To scan a document from a scanner

1. Click .

2. In the **Document Scan** window, in the **Current Scanner** box, select the scanner. Click **Start Scan**.

3. Select the relevant details and click **Scan**.

4. Click **OK**. The scanned document appears in the list of attachments.

To change the order of the attachments
Under **Attachments**, click the row of the attachment you want to move, and then click or .

To exclude an attached file from being converted to fax format
This option is only available if you are sending the fax to an email destination.

Under **Attachments**, in the row of the attachment, select the check box in the **Native** column.

To render an attached file as the body of your email
This option is only available if sending to an email destination.

When you select to render an attached file as the body of your email, the file is excluded from conversion to fax format. The email software will use the first file type it supports as the body of your email and ignore any additional files designated as alternate body pages.

1. Attach one or multiple alternate body files. These should differ only in file format and formatting, not in content.

   If attaching multiple alternate body files, make sure that the least frequently supported body type (such as RTF) appears first (at the top of the list) and the most frequently supported body type (such as TXT) last.

2. In the row for each alternate body file attachment, select the check box in the **Alternate body** column.

To delete an attachment

Under **Attachments**, click the row of the attachment, and then click .

To view an attachment

Under **Attachments**, click the row of the attachment, and then click .

3.4 Customizing cover sheet options

Click the **Cover Sheet** tab. Your user account permissions determine if you can change the settings set by your fax administrator.

To add a cover sheet:

• Select the **Include cover sheet** check box.

To preview a cover sheet file:

• Click **View**.

To select a different cover sheet file:

• Under **Include cover sheet**, select the file. You can change cover sheet files only if you have been granted permission to do so by the fax administrator.

To customize your contact information on the cover sheet:

• Click the **More** button. In the **More Fax Addressing** dialog box, under **From**, enter your contact information as you want it to appear on the cover sheet.

3.5 Assigning billing codes

Billing codes can identify the sender, the recipient, or the content of documents. They do not typically appear in the fax but are stored with the fax on the server.

Your user account permissions determine whether you are required to enter billing codes—either one or two—and whether you can select them from a list. By default the codes are labeled *Account* and *Matter*, but may be named differently.

To enter billing codes:

1. Click the **Billing** tab, enter a code in the **Account** box, in the **Matter** box, or both. You may also be able to select billing codes from a list:

2. Click the **Lookup** button, and then click **OpenText Fax Billing Table** on the shortcut menu. The **Billing Code Lookup** dialog box opens.

3. In the **Account**, **Matter**, or **Description** box, enter the characters by which to search.

4. Click **Search**, and then double-click a billing code to select it.

3.6   Entering comments about the fax

You may wish to associate notes or comments with the fax. Comments will appear in the fax mailbox in the Comments column and in the fax history. Comments are not sent to the recipient.

To add comments for your own use, click the **Comment** tab, and enter a comment.

3.7   Selecting options for converting documents

Click the **Conversion** tab. Your user account permissions determine if you can change the settings set by your fax administrator.

To adjust the quality of the conversion:

The **Conversion Bias** setting determines whether the conversion of attachments is optimized for images, text, both, or not at all.

- To use the setting selected by your administrator, select **Use Server Default**. If the resulting quality does not meet your needs, you can try to improve it by respectively selecting **Optimize for Images**, **Optimize for Text**, **High Contrast** (optimize for both images and text), or **None** (do not optimize). You can use the Hold for Preview option to check the quality of the conversion.

To convert documents to PDF:

When sending a fax, you may have the following PDF options if the OpenText Fax server is configured to allow them:

- When sending to a fax number, the fax is sent in fax file format. If configured, a PDF of the fax is stored on the OpenText Fax server, and you can view the PDF image.

- When sending to an email address, you may have the option to send the fax in PDF file format.

If you send password-protected PDF files, they are encrypted and are rendered in color, as applicable.

The creation of PDF images requires the optional PDF module. For more information, see the *OpenText Fax - Administrator Guide (FXNET-AGD)*. The ability to encrypt the PDF files requires the optional SecureDocs module. For more information, see the *OpenText Fax - SecureDocs Module Administrator Guide (FXNET-ASD)*.

- Select the **Create PDF image** check box.

  To password protect the PDF file, click **PDF options**, and the **PDF Options** dialog box opens.

Require a password to open the document
> The recipient can open the document. Select the check box, and enter the password.

Restrict editing or printing of the document
> The recipient can edit the PDF. Select the check box, and then select the actions that the user can perform on the PDF.

Permission Password
> Anyone with the permission password can open, print, and save the document, change the editing permissions, and change the PDF passwords. Select the **Restrict editing or printing of the document** check box, and enter the password.

To apply an overlay form to the fax:

An overlay form, such as a letterhead, can be applied to the fax. Overlay forms are fax images that superimpose over the fax to give it the appearance of having been printed on a form prior to faxing.

1. Select the **Use Form** check box.

2. In the list, select the form.

To hold the fax for preview:

- To hold the fax in a status of *Held for Preview* until you release it to be sent, select the **Hold for preview** checkbox.

3.8 Selecting transmission options

Click the **Sending** tab. Your user account permissions determine if you can change the settings set by your fax administrator.

To send with Certified Delivery:

- For email destinations, you can send a link to the fax rather than the fax. You will be notified when the fax has been viewed. Select the **Certified Delivery** check box. Sending via Certified Delivery requires the SecureDocs module.

To use smart resume:

- Select the **Smart resume** check box to only resend the portion of the fax that failed in case errors occur during transmission.

To delay sending until the cheap rates time defined in your FaxUtil options:

- Select the **Use cheap rates** check box. If the time has passed, the fax will be delayed until tomorrow at the cheap rates time.

To change the cheap rates time:

- On the **Tools** menu, click **Options**, and in the **Cheap Time** box on the **Other Options** tab, specify the time.

To delay sending until a specified date and time:

- Select the **Delay send** check box, and then specify the time and date in the boxes below. If the date and time have passed, the fax will be queued to sent as soon as possible.

To change the priority for sending the fax:

- In the **Priority** list, select one of the following:

    - **Normal** to queue the fax in the order it is sent.

    - **Low** to move the fax to the end of the send queue on the fax server.

    - **High** to move the fax to the front of the send queue on the fax server. This option is available if you have the appropriate permission.

To change the automatic deletion setting for the fax:

- In the **Automatic Deletion** list, select when to delete the fax from your mailbox:

    - To never delete, click **Never**.

    - To delete after the fax was successfully sent, click **After Successfully Sent**.

    - To delete the fax independent of whether it is sent successfully, click **Always**.

To send a text notification about this fax to the recipient's phone:

- In the **Notification address** box, enter the recipient's SMS number.

To enter an alternate fax number:

- In the **Alternate fax** box, enter the recipient's alternate fax number. This number may appear on the fax cover sheet.

To restrict sending to a specific fax machine:

- In the **Recipient fax ID** box, enter the CSID of the receiving machine. If the ID does not match, the fax is not sent. Leave blank to allow sending to any fax machine.

Chapter 4

Viewing the fax list

You can customize how you view the fax list and what faxes appear in the list and which data columns appear. In addition to customizing the list, you can search for faxes using a simple search in a single column or an advanced search.

4.1 Managing fax folders

Faxes in your mailbox are organized in folders. Every mailbox includes the system folders All and Main. You can create custom folders and nest folders within folders. Independent of their location in other mailboxes, all faxes appear in the All folder.

You can move all or select faxes from one folder to another.

If you move the faxes to the Trash folder, you will be prompted to confirm their deletion.

If the OpenText Fax Archive Module is in use, the Archive folder is available. The folders All, Main, and Archive cannot be renamed, and they cannot contain other folders.

To create a custom folder:

1. Depending on where you want to create the folder, do one of the following:

    • Click **Main** to create the folder on the same level as the Main folder.

    • Click a custom folder within which to create the folder.

2. On the **File** menu, point to **Folder**, and then click **New**.

3. In the **New Folder** box, type a name, and then click **OK**.

To rename a custom folder:

1. Right-click the folder, and then click **Rename**.

2. In the **New Folder Name** box, type the new name, and then click **OK**.

To delete a custom folder:

1. Right-click the folder, and then click **Delete folder contents**. Click **OK** to confirm that you want to delete the contents of the folder.

2. Right-click the folder, and then click **Delete folder**. Click **OK** to confirm that you want to delete the folder.

Depending on options specified by you or the administrator, the folder and its contents are either permanently deleted or moved to **Trash**. See "Deleting faxes" on page 37.

To move selected faxes to another folder:

• Select the faxes in the list, and then do one of the following:

  – Drag the selection to the appropriate folder in the left pane.

  – Right-click the selection, and on the shortcut menu, click **Move to folder**. In the list of folders, select the destination folder.

To move all faxes in one folder to another:

1. Right-click a folder other than All, and on the shortcut menu, click **Move folder contents**.

2. In the list of folders, select the destination folder, and then click **OK**. All faxes in a completed status will be moved.

   📄 **Note:** Faxes in any other status may not get moved. Faxes are completed when they have either been sent successfully or failed to send and will not be retried.

To work with faxes in the Archive folder:

The Archive folder is available if the OpenText Fax Archive Module is in use. The folder contains your faxes that have been archived according to criteria determined by your system administrator.

• You can use simple or advanced search to find faxes in the Archive folder.

• You can view, print, download, and save copies of archived faxes.

• You cannot delete archived faxes or move them to another folder.

• When viewing a fax, you cannot make any changes or annotations. Pages can be rotated, but the setting is not saved.

4.2   Customizing the appearance of the fax list

To change how many faxes appear per page:

1. In the **Show <n> faxes** box, select **25**, **50**, **75**, **100**, or **250**.

2. To view the next or previous page of faxes, click the left or right arrow next to the **Page** box.

To sort your faxes:

1. Click a column header in the fax list to sort the list in ascending order on data in that column.

2. To sort the list in descending order, click the same column header again.

To move columns:

1. Click the column header of the column you want to move.

2. Drag and drop the column to the new position. When you drag the column header, a vertical bar shows the position of the column.

4.3 Customizing the contents of the fax list

You can view all saved faxes for the selected user or users or show only a subset of faxes. If you apply a filter to the list, the selected filter appears below the tool bar after the name of the selected folder.

You can also remove or add columns to customize which data appears in the list.

To view all faxes:

- On the **List** menu, click **Full List**.

To apply a filter to view only a subset of faxes:

1. On the **List** menu, click one of the following:

   - **Sent Faxes** to show only sent faxes.

   - **Received Faxes** to show only received faxes.

   - **In-process Faxes** to show only faxes currently being sent.

   - **New Faxes** to show only faxes that have not yet been viewed.

   - **Received and In-process Faxes** to show faxes that have been received and those that are currently being sent.

   - **Needing Approval** to show only faxes that need approval.

2. If you are an administrator viewing the list in administrative mode, you can apply an additional filter. See .

To add or remove columns:

1. Right-click any column header in the list.

2. Point to **View**. All items with a check mark appear as columns in the list.

3. Do one of the following:

   - Click a selected item to remove it.

   - Click an unselected item to add it.

   - To restore the default view, click **Reset to Defaults**.

4.4   Searching the fax list (simple)

You can search for faxes by text in the information about the fax and in the text of the fax.

To perform a simple search:

1. In the **Search** box, enter text by which to search. You have the following options.

    -   **Comment** – Enter text to search the comments about the fax.

    -   **To name or from name** – Enter a full or part of the recipient or sender name.

    -   **To company** – Enter a full or part of the recipient company name.

    -   **To fax number** – Enter a full or part of the destination fax number.

    -   **To voice number** – Enter a full or part of the voice telephone number of the recipient.

    -   **To city or state** – Enter the full or part of the city or state of the recipient.

    -   **Billing code 1 or 2** – Enter a full or part of the billing code.

    -   **Remote ID** – Enter a full or part of the name or telephone number of the sending fax machine.

    -   **Company telephone number** – Enter a full or part of the telephone number for the sending company.

    -   **Unique ID** – Enter a full or part of the unique ID of the fax.

    -   **OpenText Fax Cloud Connect job ID** – Enter a full or part of the job ID.

    -   **ANI** – Enter a full or part of an ANI code.

    -   **Date created** – Enter a full or part of the date that the fax was created. If you enter a date surrounded by quotation marks, the system will search for the exact text within the quotation marks.

    -   **Text** – If the OCR Module is in use and the fax has been converted to text, then you can enter any text to find within that text.

    -   **Metadata** – In the left pane, click the workflow folder in which to search. In the **Search** box, enter the metadata text for which to search.

2. To start a new search, type new text in the **Search** box.

3. To clear the search, delete the text from the **Search** box.

4.5 Searching the fax list (advanced)

You can search for text in multiple fields while applying filters.

> **Note:** Advanced search and administrative mode are mutually exclusive.
> Starting advanced search deselects administrative mode.

To perform an advanced search:

1. Click **Advanced Search**, and the **Advanced Search** dialog box opens.

2. On the **Filter** tab, specify the filters to apply. See "Specifying the filters" on page 26.

3. On the **Find** tab, in each box for a field you want to search, enter the search text. See "Entering text for which to search" on page 28.

4. Click **Search**.

To clear the search:

- In the **Advanced Search** dialog box, click **Reset**.

To save the search:

1. In the **Advanced Search** dialog box, click **Save**. The **Save Advanced Search Parameters** dialog box opens.

2. Enter the name for the filter, and click **OK**.

To use a filter that you have saved:

1. In the **Advanced Search** dialog box, click **Load**. The **Load Advanced Search Parameters** dialog box opens.

2. Select the filter, and click **OK**. The parameters appear in the **Advanced Search** dialog box. Click **Search**.

To modify a filter that you have saved:

1. In the **Advanced Search** dialog box, click **Load**. The **Load Advanced Search Parameters** dialog box opens.

2. Select the filter, and click **OK**. The parameters appear in the **Advanced Search** dialog box, and you can modify them.

3. Click **Save**. The **Save Advanced Search Parameters** dialog box opens.

4. Enter a new name for the filter, and click **OK**.

To delete a filter that you have saved:

1. In the **Advanced Search** dialog box, click **Delete**. The **Delete Saved Search Parameters** dialog box opens.

2.   Select the filter, and click **OK**.

4.6 Specifying the filters

The default filter settings include your own received and sent faxes, including viewed and printed ones, independent of the method of delivery and status.

To open the filter settings:

• Click the **Filter** tab.

To search a specific folder in your mailbox:

• With the **My own faxes check** box selected, next to the **Folder** box, click ⌷. Select the folder, and then click **OK**.

To exclude your own fax mailbox:

• Clear the **My own faxes** check box, and under **Other Users and Groups**, specify the mailboxes to search.

To search other user's mailboxes:

Do one of the following:

• To search all mailboxes to which you have access, click **All users available to me**.

• To search only mailboxes of specific users, click **Only these users**, and then select users, groups, or both:

  – Next to the **Users** box, click ⌷. In the list, select a user to add, and then click **Add**. Repeat as needed, and then click **OK**.

  – Next to the **Groups** box, click ⌷. In the list, select a group to add, and then click **Add**. Repeat as needed, and then click **OK**.

To search for faxes in OpenText Fax Archive:

1.   If the OpenText Fax Archive Module is in use, you can include archived faxes in the search. Select the **Archived faxes** check box.

2.   To view the search results, click the **Current Faxes** or the **Archived Faxes** tab, as shown in the following example:
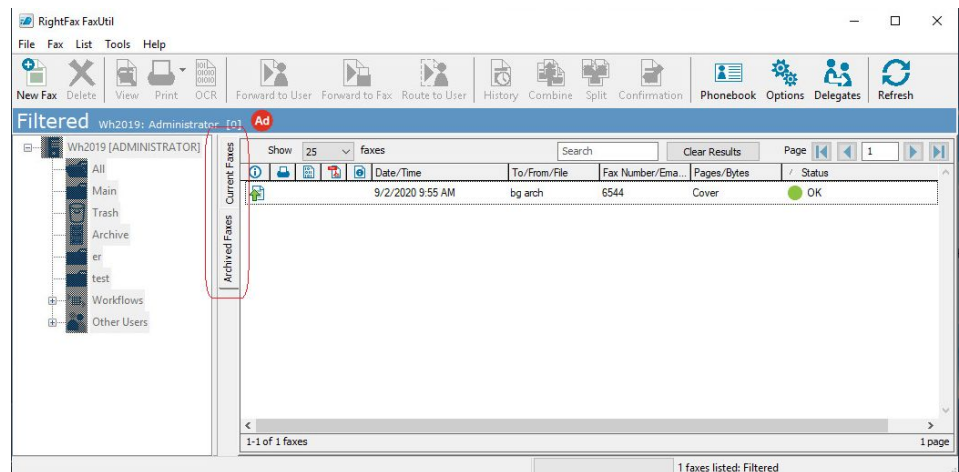
To limit the faxes by date or time:

Do one of the following:

- To include only faxes sent since a specific date or time, select the **Start Date and Time** check box, and then select a date and time.

- To include only faxes sent before a specific date or time, select the **End Date and Time** check box, and then select a date and time.

- To include only faxes sent in a specific time frame, select the **Start Date and Time** and the **End Date and Time** check boxes, and select a date and time for each.

To customize the Workflow, Delivery, and Status filters:

1. Under **Workflow**, select the **Received and Sent**, **Received only**, or **Sent only** check box.

2. To include faxes based on whether they have been viewed, select **Viewed**, **Not viewed**, or **Any view condition.**

3. To include faxes based on whether they have been printed, select **Printed**, **Not printed**, or **Any print condition.**

4. Under **Delivery**, clear the check boxes of the delivery methods you want to exclude. By default **Fax**, **Email**, **SMS**, and **Certified Delivery** are selected.

5. Under **Status**, clear the check box of each status you want to exclude.

To restore the default selections:

- Click **Reset**.

4.7   Entering text for which to search

To open the Find settings:

- Click the **Find** tab.

To enter the search text:

- Enter text by which to search in any of the following boxes:

    - **Fax Number/E-mail** – Enter a full or partial fax number or email address.
    - **To/From** – Enter a full or partial recipient or sender name.
    - **To Voice Number** – Enter a full or partial recipient voice number.
    - **To Company** – Enter a full or partial recipient company name.
    - **To City/State** – Enter full or partial city or state information for the recipient.
    - **Account** – Enter a full or partial billing code 1.
    - **Matter** – Enter a full or partial billing code 2.
    - **Comment** – Enter a full or partial comment.
    - **OCR Text** – If the OCR Module is in use and the fax has been converted to text, then you can enter any text to find within that text.
    - **Workflow Data** – Enter text from data entered in workflow fields.
    - **CSID** – Enter a full or partial CSID.
    - **ANI** – Enter a full or partial ANI code.
    - **OpenText Fax Cloud Connect Job ID** – Enter a full or partial job ID.
    - **Fax Unique ID** – Enter a full or partial unique ID.
    - **Fax Handle - Exact match** – Enter a full fax handle.

To restore the default entries:

- Click **Reset**.

4.8   Viewing other users' mailboxes

Fax administrators, group monitors, and delegates can view other users' fax lists. In this case, the Other Users option appears below your own mailbox folders.

To browse to another user's mailbox:

1. In the left pane, expand **Other Users**.

2. Browse to the other user, and then click the folder you want to view. The owner's username appears at the top of the folder list.

To search for another user's mailbox:

1. On the **Tools menu**, click **Find User**.

2. In the **Search String** box, type the string for which to search. You can enter an exact user ID, an exact routing code, or a full or partial user name.

3. Under **Search Field**, click whether the search string is a **User ID**, a **User Name**, or a **User Fax Number/Routing Code**.

4. Click **Find**. If more than one user name matches a partial user name entry, only the first occurrence is shown.

To refresh the mailbox settings and folders for another user:

1. In the left pane, expand **Other Users**.

2. Browse to the other user. Right-click the selection and, on the shortcut menu, click **Refresh User**.

To refresh the mailbox settings and folders for a user group:

1. In the left pane, expand **Other Users**.

2. Browse to the user group. Right-click the selection and, on the shortcut menu, click **Refresh All Users**.

4.9 Viewing fax mailboxes in administrative mode

As a fax administrator or a group monitor you can view the content of all fax mailboxes you administer at one time, apply filters specific to your administrative role, and quickly access all faxes requiring approval.

To enable administrative mode:

1. On the **List** menu, select **Administrative Mode**. A checkmark appears next to Administrative Mode.

2. To return to normal mode, click **Administrative Mode**. The checkmark is removed.

To view a list of all faxes awaiting approval:

1. Enable administrative mode.

2. On the **List** menu, click **Needing Approval**.

Using the administrative mode filters:

1. Enable administrative mode.

2. On the **List** menu, point to **Administrative Mode List**, and then click one of the following status filters:

- **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 delegate who has the delegate permissions Can view faxes or Can view first page of received faxes, and Can approve faxes.

- **Duplicate** – Display duplicate faxes.

- **Paper Fax Record** – Display faxes that have been manually recorded. Typically these are faxes that were not received via OpenText Fax, for example, on a conventional fax machine.

- **Print Operation Failed** – Display faxes that failed to automatically print.

Chapter 5

Viewing and handling sent and received faxes

5.1 Viewing the fax, the history, and the OCR versions

You can view the content of a fax and the history of fax activity. The fax history is created and added to as activity occurs on the fax.

> **Note:** If an administrator or group monitor disapproved a fax held for preview, the history may include a note explaining the disapproval.

Depending on your user permissions, you may be able to view prior saved versions of fax pages. Prior versions exist for saved annotated fax pages, fax pages to which an overlay form was applied, and for stamped fax pages.

To preview a fax:

- In the fax list, click the fax. The fax appears in the preview pane.

  - To view the whole page of the fax, click .

  - To zoom to the width of the page, click .

  - To view the previous or the next page, click or .

  - To move to the previous or the next fax, click or .

To turn the preview pane on or off:

- On the **Tools** menu, click **Preview Pane**.

To open a fax to view it:

- In the fax list, select the fax, and then click **View**. The fax is shown one page at a time.

  - To view the whole page of the fax, click .

  - To zoom to the width of the page, click .

  - To view thumbnail images of each page of the fax, click .

– To view the previous or the next page, click or .

– To move to the previous or the next fax, click or .

To show the fax history:

1. In the fax list, do one of the following:

   • To view both the fax and its history, open the fax, and then click the **History** tab.

   • To view the fax history only, right-click the fax, click **Show History**.

   • To view a composite history of multiple faxes, select the faxes, right-click the selection, and then click **Show History**.

      Note: The composite history cannot be filtered, printed, saved, or opened in Notepad.

2. Under **Show**, clear the check boxes of the items you do not want to include and select those you do, and then click **Apply**:

   • **Transmission** shows when the fax was received or sent and details about the transmission.

   • **Conversion** shows when and how a document was converted to fax format or a fax to text (OCR).

   • **Handling** shows when the fax was forwarded or routed and to which recipient.

   • **General** shows when the fax was printed, viewed, and annotated, and by whom.

To print the fax history, save it as a text file, or open it in Notepad:

1. Show the fax history.

2. Do any of the following:

   • To print the history, click , and then click **Print** or **Server Print**, if available. Select a printer and specify any special print options.

   • To save the history to a text file, on the **File** menu, click **Save** or **Save As**.

   • To open the history in Notepad, click .

To view previously saved versions of a fax page:

1. Open the fax and go to the fax page.

2. Click the **Prior Versions** tab. If prior versions are available, the prior versions for the page appear in a list, where each version is identified by date and time, with the most recent prior version appearing on top.

3. Click the date and time of the version you want to view.

To show and open OCR text in Notepad if available:

1. Open a received fax that has been converted to text ().

2. Click the **OCR** tab.

3. To open the text in Notepad, click .

5.2 Marking faxes as unviewed

When a fax is first received and has not yet been viewed, its entry appears bold in the fax list. Viewing the fax removes the bold formatting.

You can reapply the bold formatting without triggering any of the actions related to viewing a fax for the first time. When you do so, "Unviewed Record" and "Marked as unviewed by *user ID*" are added to the fax history.

To mark one or more faxes as unviewed:

1. In the fax list, select the received fax or faxes.

2. Right-click the selection, and on the shortcut menu, point to **Status**, and then click **Mark as Unviewed**.

5.3 Saving or printing a confirmation page

You can save or print a confirmation page that indicates that if the fax was successfully sent or not.

To save or print a confirmation page:

1. Open the fax or click a fax in the fax list.

2. On the **Fax** menu, click **Show confirmation page**.

3. You can now save or print the confirmation page.

   - To save the page, click , select a location and file format, and then click **Save**.

   - To print the page, click , select the printer, and then click **Print**.

5.4   Adding comments to a fax

You can add comments to received and to sent faxes. When you select multiple faxes, the comment is appended if comments exist. If you select a single fax, the existing comment is shown and can be modified or deleted.

When exposed in the Comment column in the fax list, truncated comments are indicated by ellipses (...).

To add or append a comment to multiple faxes:

1.   In the fax list, select the faxes.

2.   On the **Fax** menu, click **Add Comment**.

3.   In the **Comments for your Records** box, type the comment.

4.   Click **OK**. The comment will be appended to any existing comments.

To add, modify, or delete a comment for a single fax:

1.   In the fax list, select the fax.

2.   On the **Fax** menu, click **Add Comment**. The existing comment appears in the **Comments for your Records** box.

3.   As needed, change the comment text, replace, or delete it.

4.   Click **OK**.

To view comments in the fax list:

1.   On the **List** menu, point to **View**, and then click **Comment**.

2.   To view a comment that is truncated, move the pointer over the comment.

5.5   Annotating a fax

Depending on your user permissions, you may be able to add text and graphic elements to a fax page. Each time you save a page you annotated:

- The annotations become part of the image of the page and cannot be deleted or edited.
- A version of the page is created, identified by the date and time it was saved.

Depending on your user permissions, you may be able to view prior versions of saved fax pages. Any prior versions of a page appear on the Prior Versions tab while the last saved version appears on the Image tab. See "Viewing the fax, the history, and the OCR versions" on page 31.

To add, edit, or delete an annotation:

- Click to edit or delete annotations.

To delete or move a graphic annotation:

- Click the **Edit Annotation** button and then click on the annotation object. The object is surrounded with a dashed gray line. Click and drag the object to move it on the page, or right-click and select **Delete** to delete the object.

To edit a text annotation:

- Right-click and select **Edit**. This opens a dialog box for text entry. Type the text you want and click **OK**. If you want to add a carriage return to the text in this dialog box, press CTRL+ENTER.

The annotation tools:

	Pan image.
	Draw a selection box.
	Edit annotation
	Zoom to current selection.
	Draw a rectangle (outline).
	Draw a rectangle (filled).
	Draw an ellipse (outline).
	Draw an ellipse (filled).
	Add text.
	Draw line.
	Draw a freehand line. Freehand lines follow the movement of your pointer.
	Place an image from a file or from a library of images (also known as "stamps"). To place an image, browse to the folder containing the image, you can also drag and drop the image from the folder.

5.6   Sending a fax via email

You can attach a sent or received fax to an email message. You can select a fax in the fax list or send a fax you are currently viewing.

To attach a fax from the fax list:

1. In the fax list, select the fax.

2. On the **Fax** menu, click **Send via-email**.

    • If Outlook is installed on your computer, then an email message will appear with the selected file attached. Enter the destination, and send the message.

    • If Outlook is not installed on your computer, then the **Send as Email** window opens. Enter the destination, and then click **OK**. The fax will be sent as an attachment to the email message.

To attach a fax you are viewing:

•   On the **File** menu, click **Send via e-mail**.

    –   If Outlook is installed on your computer, then an email message will appear with the selected file attached. Enter the destination, and send the message.

    –   If Outlook is not installed on your computer, then the **Send as Email** window opens. Enter the destination, and then click **OK**. The fax will be sent as an attachment to the email message.

5.7   Printing faxes

The option to print to a server printer is only available if your user account allows printing to a fax server printer.

If your user account allows printing to a fax server printer, you can set up FaxUtil to print sent and received faxes automatically. To configure automatic printing, see "Defining sending preferences" on page 53 and "Defining receiving preferences" on page 54.

To print from the fax list:

1. In the fax list, select the fax or faxes.

2. On the **Fax** menu, click **Print** or **Server Print** if available.

3. Select a printer or fax server printer, specify any special print options, and then respectively click **Print** or **OK**.

To print a fax you are viewing:

1. Click , and then click **Print** or **Server Print** if available.

2. Select a printer or fax server printer, specify any special print options, and then respectively click **Print** or **OK**.

5.8 Deleting faxes

Deleted faxes are either deleted immediately or moved to the Trash folder. If you use the Trash folder for deleted faxes, you can specify that it be emptied whenever you exit FaxUtil.

To use the Trash folder for deleted faxes:

1. On the **Tools** menu, click **Options**.

2. On the **Other Options** tab, select the **Use Trash Folder When Deleting** check box.

3. If the Trash folder should be automatically emptied and the faxes permanently deleted when you exit FaxUtil, select the **Empty Trash Folder on Exit** check box.

To delete a fax you are currently viewing:

1. Click .

2. Click **Yes** to confirm the deletion.

To delete multiple faxes:

1. In the fax list, select the fax or faxes, and on the **Fax** menu, click **Delete**. To bypass the Trash folder if used, press SHIFT+DELETE.

2. Click **Yes** to confirm the deletion.

To delete all faxes in a folder:

1. Right-click the folder, and then click **Delete folder contents**.

2. Click **Yes** to confirm the deletion of the n number of faxes in the folder.

To delete all files from Trash:

1. Right-click **Trash**, and then click **Empty Trash**.

2. Click **OK** to confirm that you want to permanently delete the contents of the Trash folder.

5.9   Combining or splitting faxes

You can combine multiple faxes into a multi-page fax or split a single multi-page fax into multiple faxes.

To combine multiple faxes and send in a single fax:

1. In the fax list, select the faxes, and then click **Combine**.

2. As needed, in the **Faxes to combine** list, select a fax you want to move, delete, or view, and then click one of the following :

   - or to move the selected fax up or down the list,.

   - to delete the selected fax.

   - to view the selected fax.

3. Under **Pages to Combine**, click **All Pages** to include all pages, or click **Page Range**, and then indicate the first and last page to include in the **From** and **To** boxes.

4. Click **Combine**.

5. In the **New Fax** window enter the destination—typically required are recipient name, destination type, and a fax number or email address—and as needed, add billing codes, cover sheet notes, and specify other processing options.

6. Click **OK**.

7. If required information is missing, do one of the following:

   - To send the fax now, click **Cancel**, fill in the information, and then click **OK**.

   - To fill in the information later and hold the fax in a status of *Information Incomplete* until then, click **OK***.*

To split a fax into multiple faxes:

1. In the fax list select a multi-page fax, and then click **Split**.

2. The Number of body pages in the original fax appears above the text box.

3. In the text box, enter a page range for each fax, separating the page ranges by comma.

   Example: To split a fax that has 10 body pages into two faxes with 5 pages each, enter "1-5,6-10."

4. To retain the original file in the mailbox after the split, select the **Keep Original Fax** check box.

5. Click **OK**. A message show how many faxes were created. Click **OK**. The faxes appear in the mailbox.

5.10 Entering metadata for a fax in a workflow

If you are responsible for entering metadata for a fax in a workflow, then one or more workflows appear in the **Workflows** folder.

To enter metadata for a fax in a workflow:

1. Click the **Workflows** folder, and the list of workflows appears in the left pane.

2. Click the workflow, and the list of faxes for tagging appears in the right pane. If a fax is locked by another OpenText Fax user, then the user ID appears in the **Availability** column.

3. Select the fax, and then click **View**. The fax opens in the viewer and is locked so that other users cannot open it.

4. The list of metadata appears in the right pane. Enter the metadata in each field.

   Metadata extracted from the faxed form appears highlighted in yellow in the

   right pane. If data appears with the 🛈 icon, then the data is a result of intelligent matching. Verify and make corrections to all of the extracted text before submitting the workflow.

   If OpenText Fax Intelligent Workflows are configured, then when you are finished reviewing the extracted data, click **Save** under **Workflow Template.**

   You can edit the metadata from any previous workflow through which the fax has flowed. If data fails validation, an error message appears, and you cannot save or complete the workflow.

   If your system administrator has not configured your user account for entering metadata in the workflow, then the list of metadata will not appear in the right pane.

5. When the required data is entered, click one of the following options if they appear:

   • If you wish to finish entering metadata at a later time, click **Save and keep**.

   • If you are finished entering metadata, click **Complete workflow**.

   • If you wish to remove the fax from the workflow, click **Remove fax from workflow**. When the fax is removed from the workflow, any metadata that you have entered will be discarded.

   • If you wish to divert the fax from the workflow, click **Exception**. The fax will be diverted to the exception workflow that is defined by your system administrator.

6. To enter a comment that will appear in the history of the fax, enter text in the **Comment for fax history** box. Comments are not available if you click **Save and keep**.

7.   Do one of the following:

- To save your entries, click **Save**.

- To cancel your entries, click **Revert**.

To view metadata for a fax in a workflow:

1.   Click the **Workflows** folder, and then open folder that contains the faxes with the metadata you wish to view.

2.   Right-click any column header in the list.

3.   On the shortcut menu, click **View**, and then click **Workflows**. A column for each metadata value appears in the fax list with the label *WorkflowName:DataName*.

If data fails validation, it appears with a light red background.

If a fax was processed with OpenText Fax Intelligent Workflows, then captured data is shown with a light yellow background. This includes non-required fields for which no data was captured. If no data was found by OpenText Fax Intelligent Workflows for a required field, then the grid cell is empty and has a light red background.

To search for specific metadata, see "Searching the fax list (simple)" on page 24.

5.11   Converting received faxes to text using OCR

You can convert received fax images to text using optical character recognition (OCR) where the resulting text file is saved as an attachment of the original fax. The OCR option is available if the fax server is configured for OCR and you have the appropriate user permission. Only images of printed text are converted.

You also can have all received faxes automatically converted. See "Defining receiving preferences" on page 54.

To perform OCR on individual faxes:

1.   In the fax list, select one or more faxes.

2.   Click **OCR**.

3.   Select the file type and format for the output files.

4.   For a single fax, click **All Pages** to OCR all pages in the fax, or click **Page Range** and then indicate the first and last page to OCR.

5.   Click **OK**.

5.12   Creating a record for a paper fax

If your organization requires that all faxes be recorded in the fax server for reporting purposes, you can manually create a record of a fax that is sent or received outside of OpenText Fax. For example, a fax sent or received from a paper fax machine.

To create a record for a paper fax:

1.   On the **Fax** menu, click **Record Manual Fax**.

2.   In the **New Fax** window, complete the entries that are necessary for the fax record. See "Completing the fax information" on page 13.

3.   To indicate if the fax was sent or received, click **Sent** or **Received**.

4.   To indicate the number of pages in the fax, enter the number in the **Pages** box.

5.   Click **OK**. The fax appears in the fax list with the status Paper Fax Record.

5.13   Submitting faxes for external processing

Use this option to submit faxes for processing with the XML Generator Module or Connector for IBM FileNet.

The fax will be deleted from your mailbox and moved to a location specified for the XML Generator Module or Connector for IBM FileNet.

If external processing is not enabled, the fax will not be submitted.

To submit faxes from the fax list for external processing:

1.   Open the fax, or select the fax or faxes in the fax list.

2.   On the **Fax** menu, click **Submit for external processing**. The fax is deleted from the mailbox after it is submitted, and this may take a few minutes.

Chapter 6

Creating and using phonebooks

Depending on your user account configuration, you can store fax recipient information in a OpenText Fax phonebook and link to existing ODBC, LDAP, or MAPI contact lists.

6.1 Creating a personal OpenText Fax phonebook

Your OpenText Fax phonebook can include entries for individual fax recipients and groups of fax recipients.

To open your OpenText Fax phonebook:

You can open the phonebook using any of the following ways:

1. Click **Tools** > **Phonebook**.

2. From your mailbox, click **Phonebook**.

The Phonebook window opens.

6.1.1 Creating OpenText Fax phonebook entries

To create or edit an individual entry:

1. In the **Phonebook** window, do one of the following:

    a. Click **New Entry**.

    b. Click an individual entry in the list, and then click **Edit Entry**.

2. In the **ID** box, type an ID for the entry.

3. Under **Address**, enter addressing information for the recipient; such as a name, a destination type, and address or a number (SMS or Fax).

4. Under **Other**, enter optional contact information, such as a secondary fax number, voice numbers, and the recipient's fax id.

5. Under **Options**, select any of the following check boxes:

    • **Published**: If selected, other OpenText Fax users can view the item.

    • **Read Only**: If selected, only the owner can modify the item.

    • **Externally available**: If selected, the item is available to applications other than OpenText Fax software.

    • **Hidden on cover sheet CC list**: If selected, the item does not appear in the CC list on the cover sheet.

6.   Under **Billing Information**, enter billing codes and notes you want to assign to all faxes sent to this recipient.

7.   Click **OK**. The new entry appears as an individual entry in your phonebook list.

To create or edit a group entry:

A group phonebook entry can consist of both individual and group entries.

1.   In the **Phonebook** window, do one of the following:

   • Click **New Group**.

   • Click a group entry in the list, and then click **Edit Entry**.

2.   In the **ID** field, enter an ID for the group.

3.   Select any of the following check boxes to specify who can view and edit this group phonebook entry.

   • **Published**: If selected, other OpenText Fax users can view this phonebook item.

   • **Read Only**: If selected, only the owner can modify this phonebook item.

   • **Externally available**: If selected, this phonebook item is available to applications other than OpenText Fax software.

4.   In the box on the left, select all individual and group items you want to add to the group, and then click the right arrow to move them to the **Group Members** box.

5.   Click **OK**. The group appears in your phonebook list.

6.1.2   Importing phonebook entries

To load another user's public phonebook entries:

1.   In the **Phonebook** window, click **Other Users**.

2.   In the **Search for Users** box, enter a full or partial user name or a OpenText Fax user ID, and then click **Search**.

3.   Select the user, and then click **Load**. Any public entries from this user's phonebook appear in your OpenText Fax phonebook list.

 indicates if a user account is disabled, if it is unprotected.

4.   Repeat to load public phonebook entries from another user.

To import entries from a text file:

If your user account permission allows creating and editing phonebooks, you can import entries into your personal phonebook from a specially formatted text file.

- To create the import file, see "Creating a text file to import" on page 45.

- To import the file, see "Importing entries from a text file" on page 47.

6.1.3   Deleting OpenText Fax phonebook entries

To delete an entry:

1.   In the **Phonebook** window, in the list, click the entry.

2.   Click **Delete Entry**, and then click **Yes** to confirm the deletion.

6.1.4   Printing OpenText Fax phonebook entries

To print all or select phonebook entries:

1.   Click **Phonebook**.

2.   To print all entries in the phonebook, click **Print**. Otherwise select the entries in the list, and then click **Print Selected**.

3.   Select the printer and specify any other print settings, and then click **Print**.

6.2   Creating a text file to import

The import file can be generated by an external source such as a contact database manager, exported from another OpenText Fax phonebook, or generated by the OpenText Fax PhnPrint administrative utility. For information about PhnPrint, see the *OpenText Fax - Administrative Utilities Guide (FXNET-AWU)*.

The file to import must be a comma-, tab-, or space-delimited ASCII text file where:

- The first line is made up of the OpenText Fax field names shown in the table below. When exporting from an existing source, map each field name to the corresponding OpenText Fax name.

- Each phonebook record is separated from the next by a line break.

- Each field is separated from the next by a comma, tab, or space, depending on the selected format.

- The field values in each record appear in the same order as the corresponding field names on the first line.

- Each blank field value appears as a single space surrounded by quotation marks (" ").

- If quotation marks are used to surround any field name or field value, they must be used for all fields in the file.

The following table lists each of the valid phonebook entry fields.

Field name	Max length	Description
ID	17	A unique ID used only to reference the phonebook entry. It never appears on the fax.
Name	59	The recipient's name as it will appear on the fax cover sheet.
Company	59	The recipient's company name as it will appear on the fax cover sheet.
Address	59	The recipient's address as it will appear on the fax cover sheet.
CityState	59	The recipient's city and state as they will appear on the fax cover sheet.
Fax1	31	The recipient's primary fax number. This is used when dialing the fax destination and may appear on the fax cover sheet.
Fax2	31	The recipient's alternate fax number. This is used when dialing the fax destination and may appear on the fax cover sheet.
Voice1	31	The recipient's primary voice number as it will appear on the fax cover sheet.
Voice2	31	The recipient's alternate voice number as it will appear on the fax cover sheet.
FaxID		The recipient's fax ID.
BillCode1	17	A code associated with the recipient used for billing or tracking purposes. It never appears on the fax.
BillCode2	17	An additional code associated with the recipient used for billing or tracking purposes. It never appears on the fax.
Notes	128	Any additional information about the recipient. This will not appear on the fax and is for your information only.

Example: The following shows the first three lines and first three fields of an import file. Instead of (...), a usable import file would include all field names listed in the table and field values for each. For an example of a blank field value, see the value for Company in the second record.

"ID","Name","Company",(...)

"Jan","Jan Smith","First Company",(...)

"Reddy","Reddy Patel"," ",(...)

6.3 Importing entries from a text file

To import entries from a text file:

1. On the **Tools** menu, click **Phonebook Import**.

2. Enter the path and file name of the text file to import, or browse to it.

3. As needed, select the **Quotes around field** check box to specify that the entries in the import file include quotes and the **Publish imported entries** check box to make the imported phonebook entries available to other users.

4. Under **Text Format**, click the format of the import file.

5. Under **Field Delimiter**, click whether the fields within the import file are separated by comma, tab, or space.

6. Under **Duplicate ID Handling**, specify the action to take when a duplicate ID is encountered:

   • To import the entry and replace the existing entry, click **Replace the existing entry**.

   • To import the entry and replace the existing entry if confirmed during import, click **Replace after confirmation**.

   • To import the entry and assign a unique ID, click **Generate unique IDs**.

   • To not import the entry, click **Skip**.

7. Click **Import** . As needed, respond to confirmation messages for duplicate entries.

6.4 Exporting the entries from your OpenText Fax phonebook

You can export phonebook entries to a comma, tab, or space delimited text file.

To export the phonebook to a comma, tab, or space delimited text file:

1. On the **Tools** menu, click **Phonebook Export**.

2. To include phonebook groups as separate entries in the file, select the **Export Groups** check box. The text file shows groups at the bottom of the file, listing the IDs of the users in each group.

3. Click the delimiter to use to separate fields within phonebook entries: **Comma**, **Tab**, or **Space**.

4. Click **Export**.

6.5   Selecting MAPI, LDAP, or ODBC phonebook entries

You can select entries from phonebooks other than the OpenText Fax phonebook only if you have user permission to create and edit phonebooks. For information about configuring MAPI, LDAP, and ODBC phonebooks, see the *OpenText Fax - Administrator Guide (FXNET-AGD)*.

To select recipients from a MAPI source:

1.   Click **Phonebook**, and then click **MAPI**.

2.   In the **Profile Name** box, select the MAPI profile name, and then click **OK**.

3.   If prompted, enter your network user name, domain, and password, and then click **OK**.

4.   In the contact list, double-click each contact entry you want to select, and then click **OK**. You can search for recipients by name only or by data in other columns.

     The selected entries appear in the **Current Recipients** list of the Phonebook window.

To select recipients from an ODBC or LDAP phonebook:

1.   Click **Phonebook**.

2.   On the tab of the phonebook, select the entries, and then click **OK**. Use the arrow keys to show more records.

6.6   Customizing the columns in the phonebook

You can remove or add columns in the phonebook.

To add or remove columns:

1.   Right-click any column header in the list.

2.   Point to **View**. All items with a check mark appear as columns in the phonebook.

3.   You have the following options:

     •   Click a selected item to remove it.

     •   Click an unselected item to add it.

     •   To restore the default view, click **Reset to Defaults**.

Chapter 7

Creating signatures, stamps, and library documents

With the appropriate permissions, you can create signatures, stamps, and library documents.

- Signature files are specially formatted graphic images (typically of signatures) that you include in document files that you will be faxing. You can insert signatures into fax-bound documents using the "SIGNATURE" embedded code. To create a signature file, you must be a fax administrator.

- Stamp files are graphic images that you can add to outbound and inbound faxes. Administrators can create a library of stamps, and personal stamps can be created by and for users (known as personal stamps). Each user can have one personal stamp. When viewed in the client applications, stamps are listed in alphabetical order, and the personal stamp appears first in the list. Personal stamps are not included in the system library of stamp images.

- Library documents are frequently faxed documents stored in fax format on the fax server for easy access. You can also create library documents using the "NEWLIB" and "NEWLIB2" embedded codes. You can create library documents if your user profile includes that permission. For more information, see the *OpenText Fax - Administrator Guide (FXNET-AGD)*.

To create a signature file:

1. Fax a signed document to yourself.

2. Open the fax in your FaxUtil mailbox.

3. On the fax page, using the selection box tool, select the signature image.

4. On the **Fax** menu, click **Store**, and then click **Make Signature**

5. In the **Signature Code** box, enter a unique ID for the signature.

6. Enter the **Owner's User ID** and a **Description**.

7. In the **Authorized User IDs** boxes, enter up to three user or group IDs of users who can use the signature, including the owner's User ID.

8. Click **OK** to save the signature file.

To create, edit, or replace a stamp file:

1. Using a graphics program, create a .gif, .tiff, .jpg, .png, or .bmp image. The maximum file size is 1 MB.

2. In FaxUtil, on the **Tools** menu, click **Options**. The **Options** dialog box opens.

3. On the **User Information** tab, in the **Personal Stamp** box, click **Change**. The **Edit Stamp** dialog box opens.

4. In the **Description** box, enter or change the description of the stamp.

5. Click **Import**, and the **Import Stamp File** dialog box opens.

6. Browse to locate the image file. Select the file, and then click **Open**.

7. In the **Edit Stamp** dialog box , click **OK**.

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

To create a new or overwrite an existing library document:

1. Create the document in a word processor or other application and fax it to yourself.

2. Open the fax in your FaxUtil mailbox.

3. On the **Fax** menu, click **Store in Library**.

4. Enter a **Document ID** and a **Description**.

5. Select the check boxes for the accessibility options you want to apply.

6. You can also set activation and expiration dates. Select the check box to enable an option, and then select a date.

7. Click **OK**. The new library document will be immediately available for use in outgoing faxes.

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

Chapter 8

Creating overlay forms

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

New form files are created from your mailbox in FaxUtil or FaxUtil Web and managed in Enterprise Fax Manager or Web Admin.

You can create overlay forms if your user profile includes that permission. For more information, see the *OpenText Fax - Administrator Guide (FXNET-AGD)*.

To create an overlay form:

1. Create the document in a word processor or other application and fax it to yourself. You also can use a received fax.

2. On the main menu, select **Fax** and choose **Store as form**. The **Store Fax as Form** dialog box opens.

3. In the **Form ID** box, enter a unique name to identify the form.

4. In the **Description** box, enter a description of the form.

5. In the **Starting Page** box, enter the first page after the cover sheet to which to apply the form. If you enter **1**, the form will appear on the first body page. Page numbers are absolute. If you set the start page to **3** and a document only has two pages, none of the pages will include the form.

6. To overlay each page of the fax with the form, select the **Overlay on All Pages** check box.

7. In the **Number of Pages** box, enter the number of pages to which to apply the form.

8. To restrict the form to specific groups of users, select the **Secured** check box. Selected the group of users in the **Authorized Group or User** list.

9. If you are creating an overlay form from a received fax, you have the following options for the transmit terminal information (TTI) line.

   • To remove the TTI line so that it doesn't appear on the overlay form, select **Erase TTI Lines**.

   • To remove the TTI line so that it doesn't appear on the overlay form and adjust the size of the overlay form to fit the size of the faxed page, select **Cut TTI Lines**. In the **Adjust to Paper Size** list, select the page size.

10. Click **OK**. The new overlay form will be immediately available for use on outgoing faxes.

To delete an overlay form – To delete an overlay form, see the *OpenText Fax - Administrator Guide (FXNET-AGD)*.

Chapter 9

Defining mailbox preferences

To define mailbox preferences:

- Click **Options**, and make your selections in the **Sending**, **Receiving**, **Notification**, **User Information**, and **Other Options** tabs, and then click **OK**.

9.1 Defining sending preferences

On the **Sending** tab, you can change default sending selections for the New Fax window and, if enabled for your user account, for automatic printing.

To define default send options:

1. Under **Default Send Options** select any of the following check boxes:

    - **Use Hold for Preview**

    - **Use Smart Resume**

    - **Use Cover Sheet**.

    - **Prepopulate fax information on forward**

    - **Create PDF image for email**. Select this option to send PDF files instead of fax format files when sending to email addresses. This setting can be changed for individual faxes.

2. In the **Automatic Deletion** list, select if and when to automatically delete faxes: **Never**, **After successfully sent**, or **Always**.

3. In the **Priority** list, select the default priority: **Normal**, **Low**, or **High**. The high priority option is only available if your user profile includes the appropriate permission.

4. In the **Conversion Bias** list, you can specify that documents be converted to fax format to enhance text or graphics. This option is only available if your user profile includes the appropriate permission

    - To convert with a bias toward text legibility, select **Optimize for Text**.

    - To convert with a bias toward graphical fidelity, select **Optimize for Images**.

    - To convert with a bias toward both text and graphics, select **High Contrast**.

    - To use the setting from the fax server, select **Use Server Default**.

    - To not convert with bias, select **None**.

To define automatic printing of sent faxes:

1. If available, under **Automatic Printing**, select the **Automatically Print Sent Faxes** check box.

2. In the **Printer** list, select the printer, and then click **Print Successful Faxes**, **Print Failed Faxes**, or **Print All Sent Faxes**.

3. Select the check box for each part of the fax to print: **History**, **Cover Sheet**, and **Body Pages**. if printing the fax history, you can include a small image of the first page of the fax (typically this is the cover sheet). Select the **Include thumbnail of first page** check box. Alternatively, to include a small image of the second page of the fax, select the **Skip cover sheet** check box.

9.2   Defining receiving preferences

On the **Receiving** tab, you can define automatic processes for received faxes, such as automatic forwarding, automatic printing, and automatic conversion to text using OCR.

To not forward received faxes:

- Click **Do Not Forward Received Faxes**.

9.2.1   Defining automatic forwarding

> **Note:** The faxes are forwarded the way they are received. Required sending information such as billing codes will not be filled in.

To automatically forward to a user:

1. Click **Forward Received Faxes to Users**, and then click ....

2. In the **User selection** list, click the user, and then click **Add**.

3. Repeat step 2 to add additional recipients. Click **OK**. You can enter up to 30 characters, including commas.

To automatically forward to a fax number:

1. Click **Forward Received Faxes to Number**.

2. In the text box, type the fax number.

To automatically forward to a group of users:

1. To forward to a group of users, click **Forward Received Faxes to Group**.

2. In the list, select the group.

9.2.2   Defining automatic printing

To automatically print received faxes:

1.   Select the **Automatically Print Received Faxes** check box, and then click **Set Print Options**.

2.   In the **Selected Printer** list, click the ID of the printer.

3.   Define any additional print settings, and then click **OK**.

9.2.3   Defining automatic conversion to text (OCR)

To automatically convert received faxes to text:

1.   Select the **Automatically OCR Received Faxes** check box.

2.   Click **Set OCR Options**.

3.   In the **Output Type** and **Format** lists, select the file type and format for the output files.

4.   Under **Page Range**, specify which pages to output, and then click **OK**.

9.3   Defining notification preferences

The settings on the **Notification** tab determine when you will be notified about sent and received faxes. Typically, fax notifications are sent to you via email although the fax administrator may have created a custom notification system for your organization. You also can choose desktop notifications.

To set preferences for sent faxes:

1.   Under **Send Fax Notifications**, select the check boxes next to the sending events about which you want to be notified.

2.   In the **During Transmission** list, select if or when you want to receive notifications about sent faxes in transmission: **Never**, **Once Only**, or **Periodically**.

3.   In the **Incomplete Faxes** list, select if or when you want to receive notifications about incomplete faxes: **Never**, **Once Only**, or **Periodically**

To set preferences for received faxes:

• In the **Received Faxes** list, select if or when you want to receive notifications about received faxes: **Never**, **Once Only - When initially received**, or **Periodically - While fax has not been viewed or printed**.

To show desktop notifications for received faxes:

• On the Windows taskbar, in the notification area, right-click the OpenText Fax icon, and then click **Show Desktop Alerts**.

To route received fax notifications to another user:

1. Select the **Notify an Alternate User** check box , and then click [...].

2. In the **Search for Users** box, enter a full or partial user name or OpenText Fax user ID, and then click **Search**.

3. Select the user, click **Add**, and then click **OK**. To also notify the user of sent faxes, select the **Include sent fax notifications** check box.

   [icon] indicates if a user account is disabled, [icon] if it is unprotected.

9.4   Changing your password and default user information

On the **User Information** tab, you can change your password and information about you that appears on the fax cover sheet. You also can add a profile picture. The profile picture appears in FaxUtil and FaxUtil Web.

To change your password:

1. Under**User System Information**, click **Change Password**.

2. Type your current password in the **Old Password** box and your new password in the **New Password** and **Confirmation** boxes, and then click **OK**.

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

   • Consists of at least 8 characters.

   • Includes both upper- and lowercase characters.

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

   If your organization does not use strong passwords, your password can be any combination of letters (upper- and lowercase), numbers, and special characters. The password is case-sensitive. You may use a blank password only if the fax administrator has assigned you permission to do so.

3. Click **OK**.

To change your cover sheet information:

• Under **Cover Sheet Information**, as needed, change your default user information that appears on the cover sheet of sent faxes.

To add a profile picture:

Users with permission can upload a profile picture so that it appears in the header of OpenText Fax applications. Your user group permissions determine if you can

upload a profile picture. When a profile picture is not uploaded, then the default image is the first two letters of the user name. In this case, administrator user names appear with a red background, and non-administrator user names appear with a blue background.

1. Using a graphics program, create a .gif, .jpeg, .jpg, or .png image. The maximum file size is 1 MB.

2. Under **Profile Picture**, click **Change**.

3. In the **Import Profile Picture** dialog box, select the image file, and then click **Open**.

4. In the **Select Image Area** dialog box, select the area of the image that will be used for the profile picture.

5. Click **OK**. To change the image after it is saved, you must upload a new image.

To add a personal stamp file:

Images that are frequently used in faxes can be saved so that you can place the images in faxes to personalize them. These are known as stamps. Administrators can create a library of stamps, and personal stamps can be created by or for users. Each user can have one personal stamp. Personal stamps are not included in the system library of stamp images.

1. Using a graphics program, create a .gif, .tiff, .jpg, .png, or .bmp image. The maximum file size is 1 MB.

2. Under **Personal Stamp**, click **Change**. The **Edit Stamp** dialog box opens.

3. In the **Description** box, enter or change the description of the stamp.

4. Click **Import**, and the **Import Stamp File** dialog box opens.

5. Browse to locate the image file. Select the file, and then click **Open**.

6. In the **Edit Personal Stamp** dialog box , click **OK**.

9.5 Defining general FaxUtil program preferences

On the **Other Options** tab, you can customize your interaction with FaxUtil.

To set miscellaneous program options:

- On the **Other Options** tab, under **Program Options**, select the check boxes for the options you want to activate. The options include:

  - **Enable automatic fax list updates (secs)** – In the text box, enter the number of seconds.

  - **New fax notification on startup** – Be notified of faxes you have not yet viewed when you start FaxUtil.

- **Allow multiple view windows** – View multiple faxes at one time, each in its own OpenText Fax Viewer window.

- **Use Trash folder when deleting** – Use the Trash folder as a temporary storage for deleted faxes. This means that you can restore a file after deleting it by moving it from Trash to another folder.

- **Empty Trash folder on exit** – Permanently delete files from the Trash folder when exiting FaxUtil.

- **Use OpenText Fax phonebook** – Use the OpenText Fax phonebook to be able to quickly apply fax destination information of individual users or groups of users to outgoing faxes.

- **Allow delegate duplicates in user list** – A user for whom you are a delegate will appear multiple times in the user list if the user is a member of a group or groups for which you are a delegate.

- **Show small folder icons** – Reduce the size of the icons in the tree view in the left pane of the FaxUtil window.

- **Show text on toolbar buttons** – Show or hide the descriptive labels on the buttons on the toolbar in FaxUtil.

- **Load each page into viewer on demand** – Increase the speed for viewing a fax with many pages. With this option, one page of the fax is uploaded to the viewer until the next page is selected.

To set the default magnification for viewing faxes:

You can set the fax viewer to open faxes at your preferred magnification.

- In the **Viewer zoom** box, select the magnification level.

To change the date and time display:

- In the **Date/Time format** list, select a **Short** or **Long** format. When you select an option **with server time**, the date and time of both the local computer and the server will be shown.

To change the language:

- In the **Language** list, select the language. After you restart FaxUtil, the menus and windows will be in the selected language.

To set the default print method:

If you set a default print method, then you won't be prompted to select from a local printer or server printer when you click the print button. The option to print to a server printer is only available if your user account allows printing to a fax server printer.

- Under **Default Print Method**, select one of the following options:

  - **Always ask**

     – **Local print**

     – **Server print**

To set a default server printer:

1. Click **Set Printing Options**.

2. In the **Selected Printer** list, click the ID of the printer.

3. Define any additional print settings, and then click **OK**.

To set default OCR options:

1. Click **Set OCR Options**.

2. Select the file type and format of the output files.

3. Specify which pages to output, and then click **OK**.

To make additional Phonebooks available:

- For each phonebook you want to add, in the **Users** list, select the OpenText Fax user, and in the **Password** box, type the password.

To show optional windows:

- Under **Optional Dialogs**, select the check boxes of messages or dialog boxes you want to see in FaxUtil.

Option	Description
Show print dialog when selected via toolbar	When printing a fax from the fax list, show the print dialog box so that you can change print options.
Show alternate body explanation	If your user permissions allow you to attach alternate body pages, then when attaching a file, you can have access to a message that explains alternate body pages.
Show "No Reply-to Address" warning	When sending a fax to an email address, show a message if your OpenText Fax user account does not have an email address configured.
Show route/forward dialog when dragging faxes	When dragging faxes to a folder of another OpenText Fax user, show the route or forward dialog box so that you can add recipients or enter notes.
Show "Pending Form Overlays" warning when combining faxes	When splitting or combining a fax, show a message that form overlays are in progress.

Option	Description
Show image type choice	When opening a fax to view it, show a dialog box in which you can select TIFF or fax image file format.
Show phonebook duplicates dialog	When selecting duplicate recipients from a phonebook when sending a fax, show a dialog box in which you can select or delete duplicates.
Remember folder location between sessions	When opening FaxUtil, the program will return to the folder that you last viewed.

Chapter 10

Giving other users delegate access

You can give other OpenText Fax users delegate access to your fax mailbox so that they can send or respond to faxes on your behalf. User permissions determine whether you can assign delegates and whether you can delegate to individual users or also to groups. When assigning delegates, you can assign delegate permissions from existing roles or define and save custom roles. Custom roles that you create are not shared with other users.

To assign delegates:

1. Click **Delegates**.

2. In the **Search for Users or Groups** box, enter a full or partial user or group ID, and then click **Search**.

3. In the list of matching IDs, select the users and groups, and then click **Add**.

   To remove a delegate from the **Current Delegates** list, select it, and then click **Remove**.

4. In the **Role** list, select a role. To define a role from a blank list of permissions, select **None**.

5. In the list of permissions, as needed, select and clear access options.

6. Click **OK**.

To customize and save a role:

1. With a delegate selected in the **Current Delegates** list, select a role in the **Role** list.

2. In the list of permissions, select and clear access options. The selection in the **Role** list changes to **Custom**.

3. Click **Save Custom**.

4. In the **Custom Role ID** box, enter a name for the custom role, and then click **OK**. The role appears in the **Role** list.

To delete a custom delegate role:

1. With a delegate selected in the **Current Delegates** list, select a custom role in the **Role** list.

2. Click **Delete Custom**, and then click **Yes** to confirm the deletion.

10.1   Default delegate permissions by role

Table 10-1: Read permissions

Action\Role	Owner	Editor	Reviewer
Can view faxes.	x	x	x
Can view first page of received faxes.	x	x	x
Can print faxes.	x	x	x
Can view fax history.	x	x	x
Can browse all folders.	x	x	x
Can use phone entries.	x	x	x
Can export images.	x	x	x
Can mail images.	x	x	x

Note: The x in the preceding table indicates that the permission is available for that action.

Table 10-2: Write permissions

Action\Role	Owner	Editor	Reviewer
Can create faxes.	x	x	--
Can edit faxes.	x	x	--
Can update fax status.	x	x	--
Can forward faxes.	x	x	--
Can OCR faxes.	x	x	--
Can create folders	x	x	--
Can rename folders.	x	x	--
Can create phone items.	x	x	--
Can edit phone items.	x	x	--
Can annotate faxes.	x	x	--
Can move faxes.	x	x	--
Can route faxes.	x	x	--
Can route faxes	x	x	--

Action\Role	Owner	Editor	Reviewer
Can annotate faxes with personal stamp	x	x	--

📄 **Note:** The x in the preceding table indicates that the permission is available for that action.

Table 10-3: Delete permissions

Action\Role	Owner	Editor	Reviewer
Can delete faxes.	x	--	--
Can delete folders.	x	--	--
Can delete phone items.	x	--	--

📄 **Note:** The x in the preceding table indicates that the permission is available for that action.

Table 10-4: Miscellaneous permissions

Action\Role	Owner	Editor	Reviewer
Can approve faxes.	x	x	--
Can modify user options.	x	--	--
Can modify delegates.	x	--	--
Can toggle refuse fax distributions.	x	x	--
Requires fax approval.	--	--	--

📄 **Notes**

- The x in the preceding table indicates that the permission is available for that action.

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

Chapter 11

Fax status and error messages

The following list describes the fax status and error messages.

A new fax has arrived for [_UserID_**] from remote ID: [**_RemoteID_**]**
Another user has designated you to be their alternate for notification and they have received a new fax.

A new fax has arrived for [_UserID_**] which hasn't been viewed or printed**
A member of the group for which you are the fax administrator or alternate administrator has received a fax and has not viewed or printed it within one hour of receipt.

A new fax has arrived from remote ID: [_RemoteID_**]**
You have received a new fax. You will continue to be notified for one hour (or other period specified by the administrator). If you do not view or print the fax, your group's administrator will be notified. If he or she does not print the fax, your group's alternate administrator will be notified.

An outgoing fax is ready for previewing
The fax that you requested to be held for preview has been processed by the fax server and is waiting in your mailbox. You must release it to start the sending process.

Answer tone detected
The fax server could not connect with the remote (receiving) fax machine due to communication errors between the receiving fax machine and the fax server.

Bad FCS Information
Incorrect information was entered on the cover sheet.

Bad Formtype
You have specified an overlay form that does not exist or is corrupt.

Bad Phone Number
You entered an incorrect or nonexistent fax phone number.

Bad Signature Code
The code that identifies the signature file is not recognized, because it is corrupt or it does not exist.

Call answered before one full ring
The fax server did not receive a normal-length ringback signal from the phone service provider.

Carrier not detected
The fax server did not detect a dial tone when it tried to dial out.

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

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

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

Communications-line failure
The fax card was unable to make a valid connection with the remote (receiving) fax machine.

Conversion Failed
The fax server was unable to convert the document to Group III format.

Dial failure or no dial tone
The fax server cannot detect a dial tone, because there is a problem with the phone line or the fax card is configured incorrectly.

Duplicate
The fax is a duplicate. It has been forwarded to you by another user.

Equipment busy tone detected
The phone line of the remote (receiving) fax machine is busy.

Fax Discarded
The fax server threw the fax away. Contact your administrator.

Fax number busy
The fax server has tried to send the fax the required number of times, and each time the phone number was busy. The default value is 5 tries.

Fax to [*Name*] abandoned, too many retries
The fax server will try to successfully send the fax a specified number of times (determined by the administrator) then quit trying. The default value is 5 tries.

Fax to [*Name*], [*Error*]
The outgoing fax encountered the error listed. (See the error listed for more information.)

FCS Create Failed
The cover sheet of the fax could not be created due to a corrupt or incompatible cover sheet.

Function not implemented
An operation was attempted that is not currently supported by the fax card software.

G2 Fax Machine
You have attempted to send a fax to a Group II machine, rather than a Group III machine.

Held for Preview
The fax is held for your preview before it will be sent. You must release the fax to start the sending process.

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

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

Illegal option in call
This error could occur if an invalid parameter is given for one of several different commands, including LOG, DEBUG, XFER, and SEND.

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

Illegal Sig. Use
You have included a signature file in the fax that you are not authorized to use.

Imaging error encountered, fax abandoned
The fax server was unable to convert the document to Group III format for transmission, and so it quit trying.

In Conversion
The fax server is converting the document to fax format for transmission.

In Validation
The signature or billing codes in the fax are being validated against the fax database.

Info Not Complete
Some of the required sending information is missing from the fax.

Initial Processing
The fax server is checking the document for embedded codes and calculating the number of pages in the fax.

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

Invalid Embedded Code
You have included a misspelled, incomplete, or nonexistent embedded code in the fax.

Line in Use
The fax server was not able to send the fax, because there were no outgoing phone lines available.

Loop current detected

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

Loop current failed

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

Loop current not detected

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

Network congestion detected

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

Network high and dry (no ring)

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

No Answer at Fax #

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

No answer tone detected

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

Non-G3 Modem Detected

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

OCR error

An error occurred while a document was being sent to or in processing by the OCR Module.

OCR in process

The fax has been queued and is being processed for optical character recognition (OCR) by the OCR Module.

OK

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

One of your outgoing faxes needs attention

Some of the required sending information is missing from the fax.

P2 was not detected at the end of training

There is a performance problem with the fax server and the number of fax cards that it contains.

Paper Fax Record

For the fax history record, the fax was manually recorded as sent or received on a conventional fax machine.

Phone Line Problems

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

Poor Quality

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

Printing

The fax is printing.

Printing Error

An error occurred while the fax was printing.

Protocol reject message

This is a generic protocol error code that could have several meanings. In general, the fax card in the fax server is having difficulty communicating with the remote (receiving) fax machine, because it isn't getting the signals it expected.

Protocol timeout

This is a generic protocol error code that could have several meanings. In general, the fax card in the fax server is having difficulty communicating with the remote fax machine, because it isn't getting the signals it expected in the appropriate time frame.

Queued for OCR

The fax has been queued and is waiting for the OCR Module to convert it using optical character recognition (OCR).

Queued for Printing

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

Ringback signal detected

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

Ringback, but no answer tone

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

Ringback, then busy condition

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

Scheduled for Send

The fax was successfully converted to fax format and is now being sent to the fax server to await sending. If you specified a date and time to send the fax, the fax server will wait to send it then.

Scheduling Failed
    The fax was converted correctly, but it couldn't be correctly queued to be sent.

Sending
    The fax server is transmitting the fax.

Sending fax to [*Name*] at [*FaxNumber*]
    The fax is being sent to the name and fax number specified.

Sig Needs Authorization
    You must be authorized to use the signature file that is included in the fax.

Training Algorithm detected FSK
    There is a performance problem with the fax server and the number of fax cards it contains.

Training Algorithm found on PN
    There is a performance problem with the fax server and the number of fax cards it contains.

Tx/Rx Error
    The receiving fax machine was experiencing difficulties or excessive line noise.

Unknown Error
    Undetermined error.

Unknown Error Code
    Error condition is not known.

Unknown Status Code
    An unknown status code has been returned to the fax server from the fax card.

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

Waiting for Conversion
    The fax server is busy with another process and has queued the fax to be converted.

Waiting to be Sent
    The fax is waiting to be scheduled for faxing.

Your fax has been successfully sent to [*Name*] at [*FaxNumber*]
    The fax was successfully sent over the phone lines. This does not guarantee successful receipt of the fax at its destination.

Your outgoing fax contains an invalid billing code
    You have either not entered a required billing code or entered one that does not exist.

Chapter 12

OpenText Fax embedded codes

Embedded codes are faxing instructions that you insert into fax-bound documents. You can use them to address faxes, include fax cover sheet information, attach library documents, add billing information, insert your signature, and more. These are not the same as the codes you can insert on fax cover sheets.

When the OpenText Fax server converts the document to fax form, it uses the instructions contained in the embedded codes and then strips the codes from the document.

Example: <TOFAXNUM:555-1212> The embedded code TOFAXNUM instructs the OpenText Fax server to send the fax to the destination fax number 555-1212.

Example: <TOFAXNUM:{MERGEFIELD FaxNumber}> Together with mail merge from Microsoft Word, the embedded code TOFAXNUM instructs the OpenText Fax server to send the fax to the numbers included in the FaxNumber field of a data source.

If you send faxes via an SMTP gateway and use embedded codes, you must select the **Use PCL converter for text files** option in your email configuration.

To add embedded codes to a document:

- Anywhere in a document that accepts text characters, type the code along with any required parameters between angle brackets (<CODE:*parameter*>), observing the following guidelines:

    - Embedded codes can require no parameter **<CODE>,** have one parameter **<CODE:parameter>**, or have multiple parameters **<CODE:parameter,parameter,parameter>**.

    - Every embedded code string (angle brackets, code, and parameters) in your document must be formatted using a native printer font. Only native printer fonts are stored in their original text format in the PCL file from which the fax is generated. All other fonts are converted to graphic images.

    - Incorrectly typed or formatted codes will be ignored and will appear in the fax as text. Examples include mistyped codes, missing angle brackets, or code strings in a font that is not a native printer font.

    - Code statements that wrap to a second line will be ignored and will appear in the fax as text.

📄 **Notes**

- In very large documents that use embedded codes, the pre-scanning process can cause the fax server to appear unresponsive. You can specify the maximum length of time for embedded code processing by editing the Windows registry PrescanTimeoutSeconds value.

- In the following sections the embedded code that are prefixed with an asterisk are compatible with OpenText Fax email gateways.

12.1 ADDDOC

Adds a file to the end of the fax. The specified file is not deleted after conversion. To append multiple files to a document, add the ADDDOC code multiple times. The files will be appended in the sequence in which the codes appear in the document.

Format	<ADDDOC:*file*>
Max field length	N/A
Example	<adddoc:\\server8\sys\bin\xyz.tif>

To add an ADDDOC, ADDDOC2, ADDDOC3, or ADDDOC4 code:

- Specify the file path (`\\<ComputerName>\<Folder>\<filename>.<extension>`). For a list of supported formats, see "File formats that convert to fax format" on page 89.

  Verify that OpenText Fax has access privileges to the file. If the attachment is located on a client machine, verify that the client directory allows sharing so that the server can access the remote file.

12.2 ADDDOC2

Replaces the document that contains it with the specified file. The original file will be deleted.

Format	<ADDDOC2:*file*>
Max field length	N/A
Examples	<adddoc2:\\server8\sys\bin\123.tif>

12.3 ADDDOC3

Adds a file to the end of the fax. The original file will be deleted.

Format	<ADDDOC3:*file*>
Max field length	N/A
Examples	<adddoc3:\\server8\sys\bin\xyz.tif>

12.4 ADDDOC4

Replaces the document that contains it with the specified file. The original file is retained.

Format	<ADDDOC4:*file*>
Max field length	N/A
Example	<adddoc4:\\server8\sys\bin\xyz.tif>

12.5 *ATDATE

Schedules to send the fax on a specific date.

By default the current time on the specified day is used as the send time. For example, if a fax is sent to the queue at 3:30 p.m. and it contains <ATDATE:+1> and no ATTIME code, it will be scheduled to send at 3:30 p.m. the next day.

Format	<ATDATE:*date*>
Max field length	10 characters
Example	<ATDATE:+2> <ATDATE:9-15-15>

To enter a date relative to the current date:

- Enter **+<*n*>**, where n is the number of days after the current date. For example, to schedule the fax to send a week after the current day, enter +7.

To enter an absolute date:

- Enter a specific date using one of the following formats: *<MM>/<DD>/<YY>*, *<MM>-<DD-YY>*, or *<MM>-<DD>-<YYYY>*.

12.6 *ATTIME

Schedules to send the fax at a specific time.

The fax will become eligible for scheduling within 15 minutes of the specified time. Specifying a time between the current time and midnight will schedule the fax to send the same day. Specifying a time earlier than the current time will schedule the fax the next day.

Format	<ATTIME:*time*>
Max field length	9 characters
Example	<ATTIME:+2> <ATTIME:10:00p>

To enter a time relative to the current time:

Do one of the following:

- Enter **+<*n*>**, where n is the number of hours after the current time.

- Enter **+<*n.n*>**, where the first n is either **0** or the number of hours, and the n after the decimal point is a number 1-9 for the number of six minute increments.

To enter an absolute time:

- Enter the time as **<*hhmm*>** or **<*hh*>:<*mm*>** in either 12-hour or 24-hour format. To indicate A.M and P.M for 12-hour format, append **a** or **p** after the time.

12.7   *BILLINFO1

Assigns the first billing code to the fax.

Embedded billing codes must comply with any billing code verification rules set up on the OpenText Fax server.

Format	<BILLINFO1:*code*>
Max field length	15 characters
Example	<BILLINFO1:4444>

12.8   *BILLINFO2

Assigns the second billing code to the fax.

Embedded billing codes must comply with any billing code verification rules set up on the OpenText Fax server.

Format	<BILLINFO2:*code*>
Max field length	15 characters
Example	<BILLINFO2:5555>

12.9   BREAK

📄 **Note:** Do not use a PostScript driver when using the <BREAK> code. Use a PCL driver instead.

Breaks a single fax document into multiple faxes with multiple recipients.

The break occurs at the point where the code is encountered. Each separate fax in the document must contain its own fax recipient information using the <TONAME> and <TOFAXNUM> embedded codes.

Format	<BREAK>
Max field length	N/A
Example	<BREAK>

When the fax server encounters the <BREAK> embedded code, it automatically flushes any existing print formatting information that was contained in the file's print header.

> **Note:** Therefore, use the <BREAK> code only within ASCII print stream files that do not have print headers associated with them

12.10 BROADCAST

Specifies that the fax is a fax broadcast to increase the speed at which the broadcast is sent. Unnecessary server processes are decreased or eliminated, including polling for and returning of status information, requests for notifications, and automatic printing of faxes. Printing of failed faxes is not effected by this embedded code.

Format	<BROADCAST>
Max field length	N/A
Example	<BROADCAST>

12.11 *CHANNEL

Sends the fax on the specified channel of the fax board.

This can be useful if your organization sends priority faxes or fax broadcasts on specific channels.

Format	<CHANNEL:*channel#*>
Max field length	N/A
Example	<CHANNEL:3> Listed in OpenText Fax DocTransport as Channel #2

To specify the fax channel number:

• Increment the channel number found in OpenText Fax DocTransport by 1. (A value of 0 would indicate that any available channel can be used.)

12.12 COMPLETEEVENT

Generates completion events that can be used by the OpenText Fax API. This is useful if you write code to send the status of the fax to a user, to a database, or to a host application.

Format	<COMPLETEEVENT>
Max field length	N/A
Example	<COMPLETEEVENT>

12.13 *CONVERSION_BIAS

Overrides the default conversion bias set for the server.

Enter the word or just the number for the option:

- **none** or **1** to not optimize the conversion.

- **images** or **2** to optimize for graphical fidelity.

- **text** or **3** to optimize for legibility of text.

- **highcontrast** or **4** to optimize for both text and images.

Format	<CONVERSION_BIAS:*bias*>
Max field length	N/A
Examples	<CONVERSION_BIAS:TEXT>

12.14 *COVER

Generates a OpenText Fax cover sheet for the fax. If the user account sending the fax is configured to automatically generate a cover sheet, only one cover sheet will be generated.

The default cover sheet file will be used unless an FCSFILE embedded code specifies a different cover sheet file.

Format	<COVER>
Max field length	N/A
Example	<COVER>

12.15 *DELETE

Deletes the fax from the user's mailbox after it has been successfully sent, overriding the default OpenText Fax auto-delete setting.

Format	<DELETE>
Max field length	N/A
Example	<DELETE>

12.16 *DELETEALL

Deletes the fax from the user's mailbox after it has been sent or sending has been attempted. It overrides the default OpenText Fax auto-delete setting.

Format	<DELETEALL>
Max field length	N/A
Example	<DELETEALL>

12.17 DELETEFIRSTPAGE

Removes the first page of the fax.

Deletes the first page of the fax, for example if you include all embedded codes on the first page and do not want this page sent.

This code is typically used when it is easier to add a page of embedded codes to the front of a document than to insert production embedded codes into the print stream coming from the host.

Format	<DELETEFIRSTPAGE>
Max field length	N/A
Example	<DELETEFIRSTPAGE>

12.18 DELETELASTPAGE

Deletes the last page of the fax, for example if you include all embedded codes on the last page and do not want this page sent.

This code is typically used when it is easier to add a page to the end of a document than to insert production embedded codes into the print stream coming from the host.

Format	<DELETELASTPAGE>
Max field length	N/A

Example	<DELETELASTPAGE>

12.19   *FCSFILE

Uses the specified file as the OpenText Fax-generated cover sheet.

The cover sheet file must exist in the `OpenText Fax\FCS` folder on the OpenText Fax server and must end with the extension .pcl. Do not specify a directory path.

Format	<FCSFILE:*filename*>
Max field length	12 characters
Example	<FCSFILE:MYCOVER1.PCL>

12.20   FORMTYPE

Overlays the fax onto the specified OpenText Fax form.

Format	<FORMTYPE:*formID*>
Max field length	15 characters
Example	<FORMTYPE:LETTERHEAD>

12.21   *FROMFAXNUM

Displays the sender's fax number on the OpenText Fax-generated fax cover sheet. The code will be ignored if OpenText Fax does not generate a cover sheet.

Format	<FROMFAXNUM:*faxnumber*>
Max field length	31 characters
Example	<FROMFAXNUM:(520)555-1234>

12.22   *FROMGENFAXNUM

Displays the company fax number on the OpenText Fax-generated fax cover sheet. If no cover sheet is generated by OpenText Fax, this code will be ignored.

📄 **Note:** The PCL Cover sheet code equivalent of this embedded code is <GENERALFAXNUM>.

Format	<FROMGENFAXNUM:*faxnumber*>
Max field length	31 characters
Example	<FROMGENFAXNUM:(520)555-2345>

12.23   *FROMGENPHONE

Specifies the company voice number to be placed on the OpenText Fax-generated fax cover sheet. If no cover sheet is generated by OpenText Fax, this code will be ignored.

> 📄 **Note:** The PCL Cover sheet code equivalent for this embedded code is <OPERATORNUM>.

Format	<FROMGENPHONE:*voicenumber*>
Max field length	31 characters
Example	<FROMGENPHONE:(520)555-3456>

12.24   FROMNAME

Specifies the sender's name to be placed on the OpenText Fax-generated fax cover sheet. If no cover sheet is generated by OpenText Fax, this code will be ignored.

Format	<FROMNAME:*name*>
Max field length	59 characters
Example	<FROMNAME:Jane Doe>

12.25   *FROMPHONE

Specifies the sender's voice number to be placed on the OpenText Fax-generated fax cover sheet. If no cover sheet is generated by OpenText Fax, this code will be ignored.

Format	`<FROMPHONE:voicenumber>`
Max field length	31 characters
Example	<FROMPHONE:(520)555-4567>

12.26   *IGNORE

Causes all subsequent embedded codes to be ignored.

Format	`<IGNORE>`
Max field length	N/A
Example	<IGNORE>

12.27   *LIBDOC

Sends the specified OpenText Fax library document instead of the document. You can specify multiple library documents, each as a separate LIBDOC code.

> **! Important**
> When used with email gateways, this embedded code functions exactly the same as LIBDOC2.

Format	<LIBDOC:*documentID*>
Max field length	21 characters
Example	<LIBDOC:INFOPACK1>

12.28   *LIBDOC2

Sends the specified OpenText Fax library document in addition to sending the document. You can specify multiple library documents, each as a separate LIBDOC2 code.

Format	<LIBDOC2:*documentID*>
Max field length	21 characters
Example	<LIBDOC2:INFOPACK1>

12.29   NEWDEST

Sends the document to multiple recipients. The <NEWDEST> code must appear after every destination. If <NEWDEST> is omitted for a destination, the last occurrence of any of the embedded codes takes effect. For each destination (recipient), you can use the following codes:

- BILLINFO1
- BILLINFO2
- DELETE (To override a recipient's delete preferences.)
- TOCITYSTATE
- TOCONTACTNUM
- TOCOMPANY
- TOFAXNUM
- TONAME
- SAVE (To override a recipient's save preferences.)

Format	<NEWDEST>

Max field length	N/A
Example of sending a fax to three recipients.	<TONAME:JOHN> <TOFAXNUM:555-1234> **<NEWDEST>** <TONAME:MARY> <TOFAXNUM:230-5000> **<NEWDEST>** <TOFAXNUM:555-3006> <SAVE> **<NEWDEST>**

12.30 NEWLIB

Creates or updates a library document from the document containing the code.

To create or update a library document, enter a new or existing library document ID and description. The current document will either replace or create the specified library document:

• If the document ID already exists, that library document will be replaced.

• If a matching document ID does not exist, a new library document will be created.

The newly created library document will be assigned LAN accessibility only. To specify other accessibility options, use the NEWLIB2 code instead.

Format	<NEWLIB:*libdocID*,*description*>
Max field length	N/A
Example	<NEWLIB:novpricesheet,november_prices>

12.31 NEWLIB2

Automatically creates or updates a library document from the document containing the code.

NEWLIB2 functions the same way as the NEWLIB code, except that you can also assign any of the following accessibility attributes to the library document:

• L = LAN

• F = Fax on Demand

• W = Web

• C = Catalog

Format	<NEWLIB2:*libdocID*,*description*,LFWC>
Max field length	N/A

| Example | <NEWLIB2:novpricesheet,november_prices, LFWC> |

12.32 NOBODY

Sends only the cover sheet, and not the fax body. Any embedded codes not used for the production of the cover sheet will be ignored.

Format	<NOBODY>
Max field length	N/A
Example	<NOBODY>

12.33 NOCOMPLETEEVENT

Disables complete events.

Format	<NOCOMPLETEEVENT>
Max field length	N/A
Example	<NOCOMPLETEEVENT>

12.34 *NOCOVER

Turns off automatic OpenText Fax cover sheet generation for the document.

Format	<NOCOVER>
Max field length	N/A
Example	<NOCOVER>

12.35 NOSMARTRESUME

Disables the Smart-Resume feature.

Format	<NOSMARTRESUME>
Max field length	N/A
Example	<NOSMARTRESUME>

12.36 NOTE

Adds comments to your cover sheet. OpenText Fax will not reformat or line wrap the comments.

You can use up to 21 <NOTE> codes in a single document. This is helpful if you want to enter multi-line comments.

Format	<NOTE:*text*>
Max field length	69 characters
Example	<NOTE:THE QUICK BROWN FOX JUMPS OVER THE> <NOTE:LAZY DOG.>

12.37 NOTIFY_ERROR

Sends a notification when the fax is abandoned due to transmission errors.

Format	<NOTIFY_ERROR>
Max field length	N/A
Example	<NOTIFY_ERROR>

Notify_ embedded codes send notifications to the sender's notification address specified in their OpenText Fax user account.

12.38 NOTIFY_OK

Sends a notification upon successful transmission of the fax.

Format	<NOTIFY_OK>
Max field length	N/A
Example	<NOTIFY_OK>

12.39 NOTIFY_RETRY

Sends a notification when a transmission error is encountered and the fax is being resent.

Format	<NOTIFY_RETRY>
Max field length	N/A
Example	<NOTIFY_RETRY>

12.40   *PREVIEW

Holds the fax for preview in the sender's mailbox. It must be released in FaxUtil or FaxUtil Web to send.

Format	<PREVIEW>
Max field length	N/A
Example	<PREVIEW>

12.41   *PRIORITY

Sets the priority of the outgoing fax to low normal or high. If you specify high priority and do not have the permission to do so, the fax will be sent with normal priority.

You can enter the priority using the word or just the initial letter:

- **HIGH** or **H**
- **NORMAL** or **N**
- **LOW** or **L**

Format	<PRIORITY:*priority*>
Max field length	N/A
Examples	<PRIORITY:HIGH>

12.42   *RETRYCOUNT

Specifies the number of times the fax will be retried in case of a non-fatal error, such as a busy signal. A value of 0 means the fax server will use the system defaults.

Format	<RETRYCOUNT:#>
Max field length	2 digits
Example	<RETRYCOUNT:3>

12.43 *RETRYINTERVAL

Specifies the minimum delay in minutes before a failed fax transmission is rescheduled to send

Format	<RETRYINTERVAL:#>
Max field length	2 digits
Example	<RETRYINTERVAL:2>

12.44 *SAVE

Instructs OpenText Fax to not delete the fax image from the user's mailbox after sending. This overrides any default auto-delete setting.

Format	<SAVE>
Max field length	N/A
Example	<SAVE>

12.45 SIGNATURE

> **Note:** OpenText Fax signature files are not supported in outbound PDF documents and do not appear correctly in documents converted using a PostScript driver. Use a PCL driver instead.

Inserts the specified signature image into the document at the location of the code. The left-middle point of the signature will align with the left-middle point of the code, unless the client registry key SignaturePositionPercent has been set to change this position.

You can include an unlimited number of <SIGNATURE> codes in a document. The fax server fails the fax if you are not an authorized user of the signature file.

Format	<SIGNATURE:*signatureID*>
Max field length	21 characters
Example	<SIGNATURE:BOB>

12.46   *SMARTRESUME

Enables the Smart Resume feature.

Format	<SMARTRESUME>
Max field length	N/A
Example	<SMARTRESUME>

12.47   TOALTFAXNUM

Specifies an alternate fax number that will be tried if the server is unable to send the document to the primary fax number. This number will not appear on the fax. It will only be used if sending to TOFAXNUM fails.

Format	<TOALTFAXNUM:*faxnumber*>
Max field length	31 characters
Example	<TOALTFAXNUM:520-555-1212>

12.48   TOCITYSTATE

Displays the fax recipient's city and state information on the cover sheet. This code can also include the full street address.

Format	<TOCITYSTATE:*city, state*>
Max field length	59 characters
Example	<TOCITYSTATE:TUCSON, AZ>

12.49   TOCOMPANY

Displays the specified fax recipient company name on the cover sheet.

Format	<TOCOMPANY:*company*>
Max field length	59 characters
Example	<TOCOMPANY:ACME, INC.>

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12.50 TOCONTACTNUM

Displays the specified fax recipient voice number on the cover sheet.

Format	<TOCONTACTNUM:*phonenumber*>
Max field length	31 characters
Example	<TOCONTACTNUM:520-555-1212>

12.51 TOFAXNUM

Sends the fax to the specified fax recipient fax number and displays it on the cover sheet.

Format	<TOFAXNUM:*faxnumber*>
Max field length	31 characters
Example	<TOFAXNUM:520-555-0199>

12.52 TONAME

Displays the fax recipient's name on the cover sheet and, if a matching entry is found in your OpenText Fax phonebook, sends the fax to the fax address or addresses of the individual or group entry.

Format	<TONAME:*name*>
Max field length	59 characters
Example	<TONAME:JANE DOE>

To use a published entry from another user's OpenText Fax phonebook

- Instead of *name*, enter *UserID***!***Entry*.

12.53 UNIQUEID

Specifies a unique ID for the fax instead of having one automatically generated by OpenText Fax. Custom unique IDs can be used for external document tracking systems.

Format	<UNIQUEID:*faxID*>
Max field length	15 characters
Example	<UNIQUEID:XYZ120396>

Chapter 13

File formats that convert to fax format

The following table lists the types of documents that the OpenText Fax conversion engine can convert to fax format.

Conversion of PDF attachments and Postscript requires the OpenText Fax PDF module.

Application or file format	Supported versions	Common Extension
Ami Pro	All versions	.SAM
ANSI text (7 & 8 bit)	All versions	.TXT
ASCII text (7 & 8 bit)	All versions	.TXT
Bitmap	Windows versions	.BMP
Multi-page PCX	Microsoft Fax	.DCX
EPS	If TIFF image is embedded	.EPS
G3	All versions	.G3 .BG3
GIF	All versions	.GIF
HTML	Versions through 4.0	.HTM .HTML
JPEG	All versions	.JPG .JPEG .EXIF
Lotus 1-2-3	All versions	.123
Lotus Wordpro	All versions	.LWP
Microsoft Excel	Versions 2000 - 2019	.XLS .XLSX .XLSM
Microsoft Outlook	All versions	.MSG
Microsoft PowerPoint	Versions 2000 - 2019	.PPT .PPTX .PPTM

Application or file format	Supported versions	Common Extension
Microsoft Rich Text Format	All versions	.RTF
Microsoft Visio	2000 - 2019	.VSD
Microsoft Word	2000 - 2019	.DOC .DOCX .DOCM
Microsoft WordPad	All versions	.TXT .WPC
Microsoft Works	Versions through 8.0	.WPS
Microsoft XML Paper specification	All versions	.XPS
MIME	All versions	.MHTML
PCX bitmap	All versions	.PCX
Portable Document Format	All versions	.PDF
Portable Network Graphic	All versions	.PNG
Post Script	All versions	.PS .EPS
Text-based configuration files	Varies by product	.FTP .FRM .WPC
TIFF CCITT Group 3 & 4	All versions	.TIFF
Unicode Text	MSWord with encoding	.UNI .UTF8 .UTF8e
UUEncode	No specific version	.TXT
vCard	All versions	.VCF
Visio	All versions	.VSD
XML	All versions	.XML