opentext™

OpenText™ Fax

FaxUtil Web User Guide

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

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Chapter 1

Getting started

OpenText Fax FaxUtil Web is the program with which you manage your faxes. You might also have access to other users' faxes if you have delegate permission.

When you open the program, your fax mailbox appears.

The left pane shows the available folders that contain faxes. The right pane shows the list of faxes within the selected folder.

Flags show the action taken on each fax, and status indicators show the current status of the fax.

Fax flags

	Fax was received.
	Fax was sent.
	Fax was printed.
	Fax was converted to text using optical character recognition (OCR).
	Fax was converted to PDF.
	Sent fax was forwarded to another OpenText Fax user.
	Received fax was forwarded from another OpenText Fax user.
	Certified Delivery message.
	Fax was sent to an SMS number.

	Fax was sent to an email address.
	Fax was received via email.
	Fax was viewed.

Status indicators

	Fax is being processed for transmission.
	Fax has been transmitted.
	Fax has not been transmitted due to an error. It will be retried.
	Fax has not been transmitted due to an error. It will not be retried.

For descriptions of the fax status and error messages that may appear in the fax list or in the fax history, see "Fax status and error messages" on page 63.

The system will sign you out after 15 minutes of inactivity or the time set by your OpenText Fax system administrator.

1.1   Showing the most current list of faxes

Ensure that you are looking at the most current list of faxes by regularly refreshing the list.

To refresh the fax list

- Click .

1.2   Enabling dark mode

The light on dark color scheme can be easier to read on the screen and save energy.

- On the *<username>* menu, select the **Dark mode** check box.

1.3 Changing your OpenText Fax password

If the option to change your password is not available, contact your OpenText Fax administrator to assign a new one.

To change your OpenText Fax password

1. On the *<username>* menu, click **Change Password**. The **Change Password** dialog box opens.

2. Type your current password in the **Old Password** box and your new password in the **New password** and **Confirm new password** 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 characters:

        ` - = [ ] \ ; ' , / ~ ! @ # $ % ^ & * _ + { } | : " < > ?

    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.

Chapter 2

Sending faxes

To broadcast faxes to a large number of recipients, see *OpenText Fax - Administrator Guide (FXNET-AGD)*.

2.1 Sending a new fax

To send a new fax

1. In your fax mailbox, click the folder in which to create the fax, and then click **+ New Fax**. The **New Fax** page opens.

2. Enter the information for sending the fax. For instructions, see "Completing the fax information" on page 15.

3. Click **Send**.

To send a new fax from the phonebook

1. In your fax mailbox, click the folder in which to create the fax, and then click **Phonebook**. The **Phonebook** page opens.

2. Select one or more recipients in the list.

3. On the **New** menu, click **Fax to Selected**. The **New Fax** page opens, and the recipients appear in the list on the **Recipients** tab.

4. You can add more recipients and enter the information for sending the fax. For instructions, see "Completing the fax information" on page 15.

5. Click **Send**.

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 is removed from your mailbox.

To forward to a fax number or email address

1. In your fax mailbox, select the fax in the list. On the **Fax** menu, click **Forward**, and then click **to Fax**.

2. On the **Forward Fax** page, enter the information for sending the fax, and then click **Send**. For instructions, see "Completing the fax information" on page 15.

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

1. In your fax mailbox, select the fax or faxes in the list. On the **Fax** menu, click **Forward** and then click **to Fax**, or click **Route to User**.

2. In the Forward to this user or Route to this user list, select one or more users. You can search for users by entering a full or partial user name or OpenText Fax user ID in the search box."

3. In the **Forward to User** or **Route to User** box, select one or more users. Enter a full or partial user name or OpenText Fax user ID in the search box.

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

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

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

2.3   Releasing a fax held for preview

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*.

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

To release a fax held for preview

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

2. On the **Fax** 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. After the specified number of retries, the server will stop retrying the fax.

To retry sending a failed fax

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

2. On the **Fax** menu, click **Status**, and then click **Update status**. If the fax was previously scheduled to retry, the fax server will retry immediately and not wait for the scheduled interval. If the fax was not previously scheduled to retry, the fax server will attempt to send the fax as if it were new.

2.5   Responding to faxes that need approval

A fax requires approval if any of the following is true:

- The sender's user 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. If the fax is blocked by a dialing rule, then only a fax administrator can approve the fax.

To approve a fax to send it

1. In your fax mailbox, in the fax list, select one or more faxes that need approval.

2. On the **Fax** menu, click **Status**, and then click **Approve**.

3. As needed, in the **Approve Fax** dialog 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. In your fax mailbox, in the fax list, select one or more faxes that need approval.

2. On the **Fax** menu, click **Status**, and then click **Disapprove**.

3. As needed, in the **Disapprove Fax** dialog 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 on the **New Fax** page.

- To open the **New Fax** page, on the fax mailbox page, click **New**. The page also opens when you forward a fax.

3.1 Entering the recipient

You can enter the recipient's name and address or select the recipient from the phonebook. Your user permissions determine if you can enter a recipient or if you must select it from a phonebook.

To enter a fax recipient

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

   Post-dialing delay is the wait time that can occur between the time that a fax number is dialed and the detection of an audible signal from the recipient system. Post-dialing delay can be used if your system sends faxes over IP via the SR140 Transport.

   To use a post-dialing delay, in the **Destination** box, enter an ampersand (&) followed by a sequence of DTMF digits. The post-dialing string can include telephone dialing characters such as 0-9, #, *, and a comma, but not p, t, w, and !.

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

3. Next to the **Name** box, click the down arrow to show the optional contact information for the recipient. As needed, enter the information in the **Voice number**, **Company**, **City/State**, and **Alternate fax number** boxes.

4. To restrict sending to a specific fax machine, in the **Recipient fax ID** box, enter the CSID of the receiving fax machine. If the ID does not match, the fax is not sent.

5. To add the recipient to your OpenText Fax phonebook, click **Add to Phonebook**. When the phonebook entry is saved, the ID for the entry is formatted as **AH_<*ID*>**, where *ID* consists of 15 numbers or letters. Later you can edit the phonebook entry to change the ID.

6. Click **Add to Recipients**. To view the recipients that you have added, click **View Recipients**.

To enter an email recipient

Your fax server may provide the option to send to an email address.

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

When sending a fax to an email address, you may have the following options:

- Send file attachments in their native file format.

- Send file attachments as alternate body pages that should appear in the body of the email.

- Send a PDF file instead of a TIFF file. PDF images are black and white and cannot be edited. Creating PDF images requires the PDF module.

- 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 in to the web site to view the fax, and you are notified when the fax has been viewed. Sending via Certified Delivery requires the SecureDocs module.

- Send an encrypted, password-protected PDF file instead of a TIFF file. Encrypted PDF images are rendered in color as applicable and can be edited. Creating encrypted PDF images requires the SecureDocs module.

1. In the **Destination** box, enter the email address.

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

3. Next to the **Name** box, click the down arrow to show the optional contact information for the recipient. As needed, enter the information in the **Voice number**, **Company**, **City/State**, and **Alternate fax number** boxes.

4. To add the recipient to your personal OpenText Fax phonebook, select the **Add to phonebook** check box. When the phonebook entry is saved, the ID for the entry is formatted as **AH_<ID>**, where *ID* consists of 15 numbers or letters. Later you can edit the phonebook entry to change the ID.

5. Click **Add to Recipients**. To view the recipients that you have added, click **View Recipients**.

To select a recipient from a phonebook

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

2. You have the following options:

   - To select a recipient from your personal phonebook, select **My phonebook**. In the **Phonebook Entries** list, select one or more recipients.

   - To select a recipient from another user's phonebook, select **Other user's published phonebooks**. Under **Users**, select a user in the list and then click **Load**. In the **Phonebook Entries** list, select one or more recipients.

3. Click **Add to Recipients**. To view the recipients that you have added, click **View Recipients**.

To enter comments about the fax

Comments can appear in the fax list of your fax mailbox, and they are stored with other data about the fax. Comments are not sent to the recipient.

- In the right pane click **Comment**, and enter a comment.

3.2 Adding a cover sheet

Your account permissions determine your cover sheet options.

To include a cover sheet with the fax

1. In the right pane, click **Cover Sheet**.

2. Select the **Include cover sheet** check box, and select the cover sheet in the list.

3. Cover sheet notes appear on the cover sheet of the fax. When you send to an SMS number, the recipient will receive only the text of the cover sheet notes. SMS text is limited to 160 characters. In the left pane, in the **Cover sheet notes** box, enter the text that should appear on the cover sheet of the fax or in the SMS message.

To customize the contact information on the cover sheet

- In the right pane, click **From**, enter contact information as you want it to appear on the cover sheet or in the fax information that is stored with the fax.

To preview the cover sheet

- In the right pane, click **Cover Sheet**, and then click **View**.

3.3 Attaching files to the fax

You can attach files to the fax. Attachments are converted to fax file format when they are sent.

Library documents are documents that are frequently faxed, such as company literature, credit applications, or employment forms. They are stored in a library on the fax server in fax file format, so they don't need to be converted to fax file format when they are sent.

To broadcast a fax to a large number of recipients, it is recommended that you attach library documents rather than files. This saves time, because the library documents don't need to be converted to fax file format.

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

To attach a file

1. Under **Attachments**, click **Add File**.

2.   In the Windows Explorer dialog box, locate and select the file.

3.   The file appears in the list of attachments.

You can also drag and drop the file in the **Attachments** section to attach the file.

To attach a library document

1.   Under **Attachments**, click **Add Library Document**.

2.   In the **Library Documents** dialog box, you have the following options:

- To preview the first page of a library document, then in the **ID** column, click the ID.

- To attach a library document, select one or more in the list, and then click **OK**. The library document appears in the list of attachments.

To change the order of the documents

- In the list of attachments, select the attachment you want to move, and then click or .

To send an attachment in the native file format

The option to send a file in the native file format is available if you are sending to an email destination.

- In the list of attachments, in the row with 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 **Alt. Body** column.

To delete an attachment

*   In the list of attachments, select the attachment, and then click ✕ .

3.4 Assigning billing codes

Billing codes do not appear in the fax but are stored with other data about the fax. Billing codes can be account numbers, project names, or other identification for billing or accounting purposes.

Your user permissions determine whether you are required to enter billing codes.

By default the billing code boxes are labeled *Account* and *Matter* but may have different names.

To enter billing codes

*   Next to the **Name** box, click the down arrow to show the optional contact information for the recipient. Enter a code in the **Account** box, in the **Matter** box, or both.

To search for billing codes

Your user permissions determine whether you can search for billing codes.

1.   Next to the **Name** box, click the down arrow to show the optional contact information for the recipient.

2.   Click **Billing Code Lookup**.

3.   In the **Billing Code Lookup** dialog box, under **Search by**, click **Account**, **Matter**, or **Description**.

4.   In the **Search for** box, enter the characters for which to search.

5.   Click **Search**, and the results appear in a list.

6.   Select a billing code, and then click **OK**.

3.5 Selecting conversion options

Your user account permissions determine if you can select conversion options for the fax.

To adjust the quality of the fax image

1.   In the right pane, click **Conversion**.

2.   In the **Conversion bias** list, select **Optimize for Images**, **Optimize for Text**, **High Contrast** (optimize for both images and text), or **None** (do not optimize). To use the setting selected by your administrator, select **Use Server Default**. You can use the Hold for Preview option to check the quality of the conversion.

To convert the fax 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.

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

1. In the right pane, click **Conversion**.

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

3. To protect the file with a password and encrypt it, click **PDF Options**.

4. In the **PDF Options** dialog box, enter the password and actions the recipient can perform after entering the password.

To apply an overlay form 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. An example is letterhead stationery.

1. In the right pane, click **Conversion**.

2. Select the **Use form** check box.

3. In the list, select the form.

To hold the fax for preview

If you hold a fax for preview, it will be held in a status of *Held for Preview* until you release it to be sent

1. In the right pane, click **Conversion**.

2. Select the **Hold for preview** check box.

3.6 Selecting transmission options

Your user account permissions determine if you can select transmission options for the fax.

To send with Certified Delivery

Certified Delivery sends a link to the fax to the recipient, rather than the fax. The fax is stored on your fax server, and recipient obtains the fax by clicking the link, and you are notified when the fax is viewed. Sending with Certified Delivery requires the optional SecureDocs module.

- In the right pane, click **Sending**, and select the **Use Certified Delivery** check box.

To use smart resume

If errors occur during transmission and the fax fails, you can choose to only resend the portion of the fax that failed. This is known as smart resume.

- In the right pane, click **Sending**, and select the **Use smart resume** check box.

To delay sending until the cheap rates time

It may cost less to send faxes during certain hours of the day. This is known as the cheap rates time. To set the cheap rates time, see "Defining general program preferences" on page 57.

- In the right pane, click **Sending**, and 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 delay sending until a specified date and time

1. In the right pane, click **Sending**.

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

To change the priority for sending the fax

1. In the right pane, click **Sending**.

2. 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 beginning 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

1. In the right pane, click **Sending**.

2. In the **Automatically delete** list, select when to delete the fax from your
   mailbox:

   - To never delete, click **Never**.
   - To delete after the fax is successfully sent, click **Only If Successfully Sent**.
   - To delete the fax whether or not it is sent successfully, click **All Faxes (successful & unsuccessful)**.

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

This option only is available if SMS messaging is enabled on your system.

1. In the right pane, click **Sending**.

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

Chapter 4

Viewing the list of faxes

You can customize the list of faxes - which faxes appear in the list and which data columns appear. You also can search for faxes.

4.1 Managing fax folders

Faxes in your mailbox are organized in folders. Every mailbox includes the system folders All, Main, and Trash. If the OpenText Fax Archive Module is in use, the Archive folder is available. The folders All, Main, Trash, and Archive cannot be renamed, and they cannot contain other folders.

You can create custom folders and subfolders within custom folders. Independent of their location in other folders, all faxes appear in the All folder.

You can move faxes from one folder to another.

To create a custom folder

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

   - To create the folder on the same level as the Main folder, click **Main**.

   - To create a subfolder in a custom folder, click the custom folder.

2. In the left pane, click ➕.

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

To rename a custom folder

1. Click the folder.

2. In the left pane, click ⋯⌄, and then click **Rename**.

3. In the **New Folder Name** dialog box, type the new name, and then click **Ok**.

To delete a custom folder

1. Click the folder.

2. The folder cannot be deleted if it contains faxes or subfolders. Move or delete any faxes or subfolders in the folder. In the left pane, click ⋯⌄, and then click **Delete Contents**.

3. In the left pane, click ➖.

To move faxes to another folder

All faxes in a completed status will be moved. Faxes are completed when they have been sent successfully or have failed to send and will not be retried.

Faxes in any other status cannot be moved.

1. Select the folder. To move selected faxes, then select one or more of the faxes in the list.

2. In the left pane, click ••• ∨, and then click **Move Contents**.

3. In the **Move to Folder** dialog box, select the destination folder, and then click **Ok**.

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 **n per page** list, select **25 per page**, **50 per page**, **75 per page**, **100 per page**, or **250 per page**.

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

To sort the list of faxes

1. Click the column header by which to sort the list.

2. To sort the list in ascending or descending order, click the column header.

To select the columns to show in the fax list

1. Click **Workspace**.

2. In the **Workspace** dialog box, under **Show Columns**, select the check box for each column that should appear in the list.

3. Click **OK**.

To change the width of a column in the fax list

• Drag the separator between column headers to resize the column.

To reset the appearance of the fax list

1. Click **Workspace**.

2. In the **Workspace** dialog box, click **Reset Columns**.

3. Click **OK**.

4.3 Filtering the list of faxes

To view all faxes

1. Click **Workspace**.

2. In the **Workspace** dialog box, under **Fax list filters**, click **Full List**.

To filter the list

1. Click **Workspace**.

2. In the **Workspace** dialog box, under **Fax list filters**, 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.

3. To apply additional filters, see and .

4.4 Searching the fax list (simple)

You can search for faxes by the text within the columns in the fax list.

To perform a simple search

• In the search box, type the text for which to search.

4.5   Searching the fax list (advanced)

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

To perform an advanced search

1.   Click ![icon]. and the search options appear in the left pane.

2.   Specify search criteria under **Users and Groups**, **Condition**, **Delivery**, **Start and End Dates**, and **Status**. For more information, see "Specifying the filter criteria" on page 27.

3.   Under **Text**, in each box for a field you want to search, enter the search text. For more information, see "Entering text for which to search" on page 29.

4.   Click **Apply**.

To cancel the filters and start a new search

•   Click **Clear**.

To exit advanced search

•   Click ![icon].

To save the search

1.   Under **Saved Searches**, in the **Name** box enter the name for the filter.

2.   Click **Save**.

To use a filter that you have saved

1.   Click **Clear**.

2.   Under **Saved Searches**, in the **Saved searches** list select the filter.

3.   Click **Apply**.

To modify a filter that you have saved

1.   Under **Saved Searches**, in the **Saved searches** list select the filter.

2.   Modify the search parameters.

3.   In the **Name** box, enter a new name for the filter.

4.   Click **Save**.

To delete a filter that you have saved

1.   Under **Saved Searches**, in the **Saved searches** list select the filter.

2. Click **Delete**.

4.6 Specifying the filter criteria

Once you have selected the filter criteria, click **Apply**.

To search in a specific folder in your fax mailbox

1. Under **Users and Groups**, click **My faxes**.

2. In the **Parameters** box, click the folder in which to search.

To search other users' fax mailboxes

Under **Users and Groups**, do one of the following:

- To search all mailboxes to which you have access, click **All users to which I have administrator or delegate access**.

- To search only mailboxes of specific users, click **Selected users and groups**. Under **Parameters**, select users, groups, or both:

  - In the **Users** list, search for and select a user to add. Repeat as needed.

  - In the **Groups** list, search for and select a group to add. Repeat as needed.

To search for faxes in OpenText Fax Archive

- If the OpenText Fax Archive Module is in use, you can include archived faxes in the search. Under **Users and Groups**, select the **Archived faxes** check box.

- To view the search results, click the **Current Faxes** or the **Archived Faxes** tab, as shown in the following example:
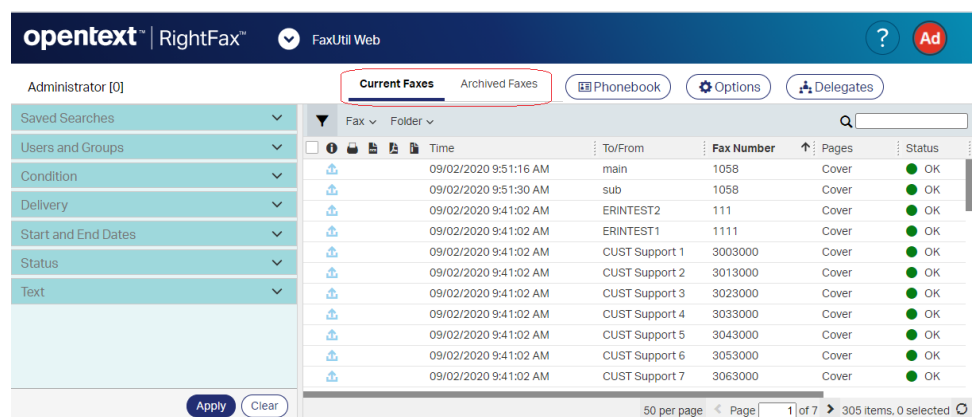
To customize the Delivery filter

- Under **Delivery**, select the check boxes of the delivery methods of faxes you want to include: **Fax**, **Email**, **SMS**, or **Certified Delivery**.

To limit the faxes by date and time

Under **Start and End Dates**, 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 Status filters

- Under **Status**, select the check box of each processing status of faxes you want to include.

  - **All statuses**. Display faxes in any processing status.
  - **Information incomplete**. Display faxes that are waiting for required information before they can be sent.
  - **Waiting for conversion**. Display faxes that are waiting to be converted to fax format.
  - **In conversion**. Display faxes that are in the process of conversion to fax format.
  - **Sending**. Display faxes that are currently being transmitted.
  - **OK**. Display faxes that have sent without errors.
  - **Failed 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.
  - **Queued for sending**. 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 being printed.
  - **Queued for printing**. Display faxes that are waiting to be printed.
  - **Print operation failed**. Display faxes that failed to automatically print.

      – **OCR in progress**. Display faxes that are being converted to text using optical character recognition (OCR).

      – **Queued for OCR**. Display faxes that are waiting to be converted to text.

      – **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.

      – **In validation**. Display faxes that are waiting for validation.

      – **Duplicate**. Display duplicate faxes.

      – **Paper fax record**. Display faxes that have been manually recorded.

4.7 Entering text for which to search

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

- **Fax number/email** – 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** – Optical character recognition (OCR) can provide the full text of the fax if the OCR Module is in use. Enter text for which to search within faxes that have been converted to text with OCR.

- **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.

4.8   Viewing other users' mailboxes

Fax administrators, group monitors, and delegates can view other users' fax lists.

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.

3.   Select the other user. The user's ID appears in place of your user ID in the upper left corner of FaxUtil Web, and the toolbar changes color.

4.9   Viewing faxes in administrative mode

As a fax administrator or a group monitor, you have access to all of the fax mailboxes that you administer.

To view faxes in administrative mode

1.   Click and the **Advanced Search** pane appears.

2.   Under **Users and Groups**, select **All users (Administrative mode)**.

Chapter 5

Viewing and handling sent and received faxes

5.1 Viewing the fax

To preview the fax

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

To turn the preview pane on or off

1. Click **Workspace**.

2. In the **Workspace** dialog box, under **Preview Pane**, select the **Show preview pane** check box.

To view the fax

- In the fax list, select one or more faxes. On the **View** menu, click **Image**. The **Viewer** page opens.

- To rotate the page, on the **Page** menu, click **Rotate**, and then click **Clockwise**, **Counterclockwise**, **Flip**, **All Pages Clockwise**, **All Pages Counterclockwise**, or **Flip All Pages**.

- To view thumbnail images of each page of the fax, on the **Page** menu, click **Show/Hide Thumbnails**.

- To view a different page of the fax, on the **Page** menu, click **Previous**, **Next**, **First**, or **Last**. Click **Go to Page** to specify the page number.

- To move to the next fax or the previous fax, click **Next Fax** or **Previous Fax**.

The viewing tools

Button	Description
	Show or hide thumbnails.
	Rotate the page left.
	Rotate the page right.
	Pan the page.

Button	Description
⊖	Zoom out.
⊕	Zoom in.
↕	Fit the page to the height of the viewer.
↔	Fit the page to the width of the viewer.

5.2   Viewing the fax history, prior versions of the fax, OCR version of the fax, or PDF version of the fax

The fax history is created and updated as activity occurs on the fax.

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

To view the fax history

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

2.   On the **View** menu, click **History**.

3.   To print or download the history, click **Download**.

To view previously saved versions of a fax page

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 stamped fax pages.

1.   Open the fax and go to the fax page. The current version appears on the **Viewer** page.

2.   Click **Versions**. If prior versions are available, they appear in the list.

3.   Select the version that you want to view.

To view OCR text if available

Optical character recognition can provide the full text of the fax if the OCR Module is in use.

1.   In the fax list, select one or more faxes that have been converted to text with the OCR Module.

2.   On the **View** menu, click **OCR Output**.

3. To print or download the OCR text, click **Download**.

To view a PDF of the fax if available

If the fax server has converted the fax to PDF, then you can view it in the fax viewer. For example, when a fax is sent via email, the fax server can send a PDF.

1. In the fax list, select one or more faxes that have been converted to PDF.

2. On the **View** menu, click **PDF**. The PDF opens in the browser or in a PDF viewer if available. Your browser may provide the option to download the PDF.

5.3 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. On the **Fax** menu, click **Status**, and then click **Mark as Unviewed**.

5.4 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 **View** menu, click **Confirmation Page**.

3. To download the page, in the **Download** list, select the file format. The file is downloaded, and you can print the confirmation page.

4. Click **Ok**.

5.5   Adding comments to a fax

You can add comments to received and to sent faxes. If comments already exist, new comments are appended. Existing comments can be modified or deleted.

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 **Add Comment** dialog 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**.

3. In the **Add Comment** dialog box, type the comment. If comments exist, you can change the comment text, replace, or delete it.

4. Click **Ok**. New comments will be appended to any existing comments.

To view comments in the fax list

1. Click **Workspace**.

2. In the **Workspace** dialog box, under **Show Columns**, select the **Comment** check box.

3. Click **Ok**. The **Comment** column appears in the fax list.
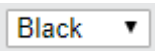
5.6   Annotating a fax

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 that 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 that it was saved.

Depending on your user permissions, you may be able to view prior versions of saved fax pages. See .

The annotation tools

Option	Description
✔	Save the annotated page.
▸	Move, edit, or delete an annotation. Click the button, and then click the annotation that you wish to move, edit, or delete.
Black ▾	Select a shade for a line, rectangle, or ellipse.
☐	Draw a rectangle.
■	Draw a filled rectangle.
○	Draw an ellipse.
●	Draw a filled ellipse.
╱	Draw a line.
⌇	Draw a freehand line.
T	Add text. Click the button, and then place the text box on the fax image. In the **Annotation text** box, type the text. To change the size of the text, enter or select the size in the **pt** box.
🖼	Place an image from a file. Click the button, and browse to the folder that contains the image.
🔨	Place a stamp image from a file. Click the button, and select the stamp.
✕	Delete the annotation.

5.7   Sending a fax via email

You can attach a sent or received fax to a message and send it as an email.

To attach a fax from the fax list

1.   In the fax list, select the fax.

2.   On the **Fax** menu, click **Send as Email**.

3.   In the **Send as Email** dialog box, enter the information for sending the fax.

   - In the **Send to** box, enter the email address.

   - In the **Subject** box, enter text that will appear in the "Notes" section of the fax cover sheet.

   - In the **Body** box, enter text that will appear as the body of the fax.

4.   Click **OK**.

To attach a fax you are viewing

1.   In the fax list, select the fax.

2.   On the **View** menu, click **Image**.

3.   On the **Fax** menu, click **Send as Email**.

4.   In the **Send as Email** dialog box, enter the information for sending the fax.

   - In the **Send to** box, enter the email address.

   - In the **Subject** box, enter text that will appear in the "Notes" section of the fax cover sheet.

   - In the **Body** box, enter text that will appear as the body of the fax.

5.   Click **OK**.

5.8   Printing faxes

To print to a local printer

1.   In the fax list, select the fax.

2.   On the **Fax** menu, click **Print**.

3.   The file opens in a new window. Click the print icon of the browser and print using the software on the local computer.

To print to a server printer, if available

A server printer is a printer configured on the fax server for network printing. The option to print to a server printer is only available if your user account allows it.

If your user account allows printing to a server printer, you can choose 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.

1. In the fax list, select the fax.

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

3. In the **Print** dialog box, select a printer, select print options, and then click **Ok**.

5.9 Deleting faxes

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

To use the Trash folder for deleted faxes

1. Click **Options**. The **Options** page opens.

2. On the **Other** tab, select the **Send deleted faxes to Trash folder** check box.

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

4. Click **OK**.

To delete a fax you are viewing

1. On the **Fax** menu, click **Delete**.

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

To delete multiple faxes

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

2. On the **Fax** menu, click **Delete**.

3. Click **Ok** to confirm the deletion.

To delete all faxes in a folder

1. Click the folder.

2. In the left pane, click ![icon], and then click **Delete Contents**.

3. Click **Ok** to confirm the deletion.

To delete all files from Trash

1. In the left pane, click ![icon], and then click **Empty Trash**.

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

5.10   Combining or splitting faxes

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

To combine multiple faxes and send in a single fax

1. In the fax list, select the faxes to combine.

2. On the **Fax** menu, click **Combine**.

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

   - ↑ or ↓ to move the selected fax up or down the list.

   - ✕ to delete the selected fax.

4. To choose the pages to include in the new fax, select a fax in the **Faxes to Combine** list. Under **Pages to Combine**, click one of the following:

   - Click **All pages** to include all pages.

   - Click **Page range**, enter one or more page numbers or a range of page numbers in the format *n-n*. You can separate multiple pages or ranges with commas.

5. Click **Ok**.

6. On the **New Fax** page, enter the information for sending the fax. For instructions, see "Completing the fax information" on page 15.

7. Click **Send**.

To split a fax into multiple faxes

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

2. On the **Fax** menu, click **Split**.

3. In the **Split Fax** dialog box, enter the page number or a page range for each fax, separating the page ranges by a comma.

   To split a fax that has 10 body pages into three faxes with one, four, and five pages respectively, enter "1,4-5,6-10."

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

5. Click **Ok**. If the original fax was a received fax, the new faxes appear in the fax mailbox as new received faxes. If the original fax was a sent fax, the new faxes appear in the fax list in the status information incomplete. To send the new faxes, see "Completing the fax information" on page 15.

5.11 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. Double-click the fax to open it. 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 $\bullet$ 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 the faxes in workflows

1. Click **Workspace**.

2. In the **Workspace** dialog box, under **Show Columns**, select the **Workflows** check box. In the workflow folders, 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 25.

5.12 Converting received faxes to text using OCR

You can convert received fax images to text using optical character recognition (OCR). The resulting text file is saved as an attachment of the original fax. The OCR option is available if the OCR Module is in use. 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 faxes

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

2. On the **Fax** menu, click **>OCR**.

3. In the **OCR** dialog box, 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 specify the range of pages to convert to text.

5. Click **OK**.

5.13 Converting faxes to other file formats

The file format for faxes is tagged image file format (TIFF). You can convert faxes to other file formats and download them.

To convert and download faxes

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

2. On the **Fax** menu, click **Download**, and then click **TIFF**, **PDF**, **JPG**, **GIF**, or **PNG**.

3. In the **Download** dialog box, click **Download**. The file will be downloaded. If you selected more than one file, a compressed (zipped) folder will be downloaded.

5.14 Adding sender information to a fax

You can add information about the sender to a received fax.

To add sender information to a fax in the fax list

1. In the fax list, select the fax.

2. On the **Fax** menu, click **Assign Sender Information**.

3. In the **Assign Sender Information** dialog box, enter the name, voice number, billing account, or billing matter.

4. Click **Ok**.

To add sender information to a fax that you are viewing

1. In the fax list, select the fax.

2. On the **View** menu, click **Image**.

3. On the **Fax** menu, click **Assign Sender Information**.

4. In the **Assign Sender Information** dialog box, enter the name, voice number, billing account, or billing matter.

5. Click **Ok**.

5.15 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 was sent or received via paper fax machine.

To create a record for a paper fax

1. From your mailbox, on the **Fax** menu, click **Record Paper Fax**.

2. In the **Paper Fax Properties** dialog box, if you sent the fax, click **Sent**. If you received the fax, click **Received**.

3. In the **Number of pages** box, enter the number of pages in the fax.

4. Complete the fax information. For more information, see "Completing the fax information" on page 15.

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

5.16 Archiving faxes

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 **External Processing**.

Chapter 6

Creating and using phonebooks

Depending on your user account configuration, you can store contact information for fax recipients in a OpenText Fax phonebook.

To create a personal OpenText Fax phonebook, navigate to **Creating and using phonebooks** > **Creating a personal phonebook**. You can use the FaxUtil Web User Help by selecting "?" icon.

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

• From your fax mailbox, click **Phonebook**. The **Phonebook** page opens.

To create an individual entry

1. On the **Phonebook** page, on the **New** menu, click **Phonebook Entry**. The **Phonebook Entry** dialog box opens.

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

3. Under **To**, enter addressing information for the recipient. For help, see "Completing the fax information" on page 15.

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

   • **Published**. If selected, the entry will be available to other OpenText Fax users. If your OpenText Fax account is not password-protected, unpublished entries from your phonebook will be accessible to other users.

   • **Read only**. If selected, only you can edit the entry.

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

5. Under **Accounting**, enter billing codes to assign to all faxes sent to this recipient.

6. Under **Other**, enter optional contact information, such as a secondary fax number, voice numbers, and the recipient's fax ID. In the **Notes** box, enter notes about the recipient.

7. Click **Ok**. The new entry appears in your phonebook list.

To create a group entry

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

1. On the **Phonebook** page, on the **New** menu, click **Phonebook Group**. The
   Phonebook Group dialog box opens.

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

3. Under **Available users and groups**, select the users and groups to include in the
   group. To search for a user or group, in the search box, enter a full or partial
   user or group ID.

4. Click **Add**. The users and groups are added to the **Current group members** list.

   To remove an entry from the list, select the entry, and then click ✖ .

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

   • **Published**. If selected, the entry will be available to other OpenText Fax
     users. If your OpenText Fax account is not password-protected, unpublished
     entries from your phonebook will be accessible to other users.

   • **Read only**. If selected, only you can edit the entry.

6. Click **Ok**. The group appears in your phonebook list.

To print phonebook entries

• Export the phonebook to a text file, and then print the file. See "Exporting
  phonebook entries" on page 47.

To edit a phonebook entry

• Select the phonebook entry from the list and click **Edit** in the toolbar.

To delete a phonebook entry

• Select the phonebook entry from the list and click **Delete** in the toolbar.

6.2   Importing phonebook 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.

6.3 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 *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.

Field name	Max length	Description
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.

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"," ",(...)

6.4   Importing entries from a text file

To import entries

1. Create the text file as described in "Creating a text file to import" on page 45.

2. In your fax mailbox, click **Phonebook**. **The Phonebook** page opens.

3. On the **File** menu, click **Import**. The **Import Phonebook** dialog box opens.

4. Click **File**. In Windows Explorer, enter the path and file name of the text file to import, or browse to it.

5. Under **Field Delimiter**, select 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:

    • **Replace the existing entry**. Imports the entry and replaces the existing entry.

    • **Generate unique IDs**. Imports the entry and assigns a unique ID.

    • **Skip**. The duplicate entry is not imported; it is skipped.

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

    • **Quotes around fields**. Select this check box if the entries in the import file include quotes around each field.

    • **Publish imported entries**. Select this check box to make the imported phonebook entries available to the other users in the system.

    • **First line of import file contains column headers**. Select this check box if the first line of the import file contains column headers.

8. Click **Ok**.

6.5   Exporting phonebook entries

You can export your OpenText Fax phonebook to a text file.

To export the phonebook

1. In your fax mailbox, click **Phonebook**. The **Phonebook** page opens.

2. On the **File** menu, click **Export**. The **Export Phonebook** dialog box opens.

3. Under **Field Delimiter**, select the delimiter to use to separate fields within phonebook entries, **Comma**, **Tab**, or **Space**.

4. 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, and the IDs of the users in each group are listed.

5.   Click **Ok**.

6.6   Customizing the columns in the phonebook

You can remove or add columns in the phonebook.

To add or remove columns

1.   Click **View**, and the **View** dialog box opens.

2.   Under **Show Columns**, you have the following options:

   - To remove a column, clear the check box for the column.
   - To add a column, select the check box for the column.
   - To restore the default view, click **Reset Columns**.

Chapter 7

Creating library documents

Library documents are frequently faxed documents that are stored in fax format on the fax server for easy access.

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

7.1 Creating a library document

To create a library document

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

2. In your fax mailbox, select the fax in the list.

3. On the **Fax** menu, click **Add to Library**. The **Add to Library** dialog box opens.

4. In the **Document ID** box, enter a unique name to identify the library document. If the library document will be available via the web client applications or Fax-on-Demand, assign a numeric document ID.

5. In the **Description** box, enter a description.

6. You have the following options for publishing the library document.

    • To make the library document available to OpenText Fax users on the local OpenText Fax server, select **Accessible locally**.

    • To make the library document available to OpenText Fax users via the OpenText Fax web client applications, select **Accessible via Web**.

    • To make the library document available via Fax-on-Demand, select **Accessible via FOD**. To include this document in the Fax-on-Demand catalog of available faxes, select **Include in FOD catalog**.

7. To specify a date when the library document will be available to users, select the **Activation date** check box. Enter the date when the library document will become available.

8. To specify a date when the library document will expire, select the **Expiration date** check box. Enter the date when the library document will become unavailable.

9. Click **Ok**.

To delete a library document

- To delete a library document, see the *OpenText Fax - Administrator Guide (FXNET-AGD)* .

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 FaxUtil or FaxUtil Web.

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

8.1 Creating 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. In your fax mailbox, select the fax in the list.

3. On the **Fax** menu, click **Add to Forms**. The **Add to Forms** dialog box opens.

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

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

6. 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.

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

8. To overlay each page of the fax with the form, select the **Overlay on all pages** check box.

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. To restrict the form to specific users or groups of users, select the option **Available to this user** or **Available to this group**. Select the users or groups from the lists.

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

To delete a form

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

Chapter 9

Defining mailbox preferences

Mailbox preferences are unique to the OpenText Fax server where you are logged in. If you connect to a different server, you must define mailbox preferences for that server.

To define mailbox preferences

- In your fax mailbox, click **Options**, and make your selections on the **Sending**, **Receiving**, **Notification**, **User**, and **Other** tabs, and then click **Save**.

9.1 Defining sending preferences

On the **Sending** tab, you can change default settings for faxes you send. The permissions in your user profile determine if you can change these settings.

To define default send options

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

    - **Hold for preview**. Faxes you send will be held so that you can preview them before you choose to send them.

    - **Use smart resume**. If a fax fails during transmission, then the fax server will resend only the portion of the fax that failed to send.

    - **Include cover sheet**. If available, you can select a cover sheet file.

    - **Prepopulate destination information on forward**. If you forward a fax that you previously sent, the destination information will be copied to the fax you are forwarding. You can change the information as needed.

    - **Create PDF image for email**. If you send a fax to an email address, a PDF will be sent instead of a TIFF file. These PDF images are black and white and cannot be edited.

2. In the **Automatically delete** list, select if and when to automatically delete faxes: **Never**, **Only if Successfully Sent**, or **All Faxes (successful and unsuccessful)**.

3. In the **Priority** list, select the default priority for sending the fax: **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 select one of the following options:

    - **Use Server Default**. Use the conversion bias that is set on the fax server.

    - **None (do not optimize)**.

    - **Optimize for Images**. Optimize for graphical fidelity.

- **Optimize for Text**. Optimize for legibility of text.

- **High Contrast**. Optimize for both images and text.

To define automatic printing of sent faxes

If enabled for your user account, you can set up automatic printing for faxes you send.

1. Under **Automatic Printing**, select the **Automatically print sent faxes** check box.

2. In the **Printer** list, select the printer.

3. Under **Content**, 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. 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.

4. Under **Conditions**, select the condition of faxes to print:

   - **Success**. Print faxes that are successfully sent.

   - **Failure**. Print faxes that failed to send.

   - **All**. Print both successfully sent faxes and faxes that failed to send.

9.2   Defining receiving preferences

On the **Receiving** tab, you can define automatic processes for faxes you receive. The permissions in your user profile determine if you can change these settings.

To automatically forward to a user

1. Click **Forward received faxes to users**.

2. Select one or more users in the list. To search for users, enter a full or partial user name or OpenText Fax user ID in the search box

To automatically forward to a group of users

1. To forward to a group of users, click **Forward received faxes to group**.

2. Select one or more user groups in the list. To search for user group, enter a full or partial user group name in the search box

To automatically forward to a fax number

1. To forward to a fax number, click **Forward received faxes to fax number**.

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

To not forward received faxes

- Click **Do not forward received faxes**.

To automatically print received faxes

1. Under **Automatic Printing**, select the **Automatically print received faxes** check box.

2. Click **Set Print Options**.

3. In the **Print** dialog box, select the printer and any additional print settings.

To automatically convert received faxes to text

1. Under **Automatic OCR**, 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.

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.

To set preferences for sent faxes

1. Under **Sent 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

- Under **Received Fax Notifications**, 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 send notifications of your received faxes to another user

1. Under **Alternate User Notifications**, select the **Notify an alternate user** check box.

2. Select one or more users in **User to notify**. To search for users, enter a full or partial user name or OpenText Fax user ID in the search box. To also notify the user of sent faxes, select the **Include sent fax notifications** check box.

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

9.4   Changing your user information

On the **User** tab, you can enter information that is unique to you.

To control Smart Fax Distribution

You may be a member of a group of users that all receive the same fax. This is known as Smart Fax Distribution.

- If you do not want to receive distributed faxes, under **General** select **Refuse distributions**. This option is available if you have the appropriate user permission.

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 has not been 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 **General**, under **Profile Picture**, click **Change**.

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

4. In the **Select image area** 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 **General**, under **Personal Stamp**, click **Change**. The **Edit Personal Stamp** dialog box opens.

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

4. In the **Edit Personal Stamp** dialog box, select the image file, and then click **Open**.

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

To change your cover sheet information

- Under **From**, as needed, enter the contact information that you wish to appear on your fax cover sheets. When you send a fax later, you can edit this information on the cover sheet.

9.5 Defining general program preferences

On the **Other** tab, you can select default program preferences.

To set miscellaneous program options

- Under **Application Options**, select the check boxes for the options you want to activate:

Enable automatic fax list updates
Select this check box for the client application to automatically check the fax server for new faxes. To change the interval for refreshing the fax list, enter the number of seconds.

Send deleted faxes to Trash folder
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
When you exit the application, files in the Trash folder will be permanently deleted.

Use OpenText Fax phonebook
When you create a fax, the entries in the OpenText Fax phonebook will be available. You can then select a destination from the phonebook for a fax you are sending.

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

To set the cheap rates time

It may cost less to send faxes during certain hours of the day. This is known as the cheap rates time.

- Under **Application Options**, in the **Cheap time** box, enter the time.

To set the default magnification for viewing faxes

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

• Under **Application Options**, in the **Viewer zoom** box, select the magnification level.

To set default options for printing

1. Under **Application Options**, click **Set Print Options**.

2. In the **Print** dialog box, in the **Printer** list select the printer to use as the default.

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

To set default options for optical character recognition

Optical character recognition (OCR) can provide the full text of the fax if the OCR Module is in use.

1. Under **Application Options**, click **Set OCR Options**.

2. In the **OCR** dialog box, select the file type and format of the output files.

3. Click **OK**.

To make additional phonebooks available

1. Under **Additional User Phonebooks**, for each phonebook you want to add, in the **User** box, select one or more users in the list.

2. In the **Password** box, type the password.

9.6 Disabling animations

Animations and transitions in web applications can interfere with performance and accessibility.

• On the *<username>* menu, select the **Animation off** check box.

Chapter 10

Giving other users delegate access

You can give other users on the network 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. From your mailbox, click **Delegates**. The **Delegates** page opens.

2. Click **New**. The **New Delegate** dialog box opens.

3. Under **User or group**, select the users and groups to assign delegate permissions. To search for a user or group, in the search box, enter a full or partial user or group ID. Matching IDs will appear in the list.

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

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

6. To save the selected permissions so that they can be quickly applied to other delegates as a new role:

    • Select **Save these permissions as a custom role**.

    • In the **Custom role ID** box, type an ID for the role.

7. Click **Ok**.

To create a new custom delegate role

1. From your mailbox, click **Delegates**. The **Delegates** page opens.

2. On the **Custom Roles** menu, click **New**. The **New Custom Role** dialog box opens. If a delegate was selected on the **Delegates** page, the properties of the delegate's role will appear.

3. In the **Custom role ID** box, type an ID for the role.

4. To create the new custom role from an existing role, in the **Based on role** list, click the role.

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

6. Click **Ok**. The role appears in the **Role** list.

To delete a custom delegate role

If you delete a custom role, delegates that have been previously assigned the custom role will retain the permissions of the custom role.

1.   From your mailbox, click **Delegates**. The **Delegates** page opens.

2.   On the **Custom Roles** menu, click **Delete**. The **Delete Custom Role** dialog box opens.

3.   In the **Custom role ID** box, select the role and then click **Ok**.

10.1   Default delegate permissions by role

Read permissions

	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

Write permissions

	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	--

	Owner	Editor	Reviewer
Can edit phone items.	x	x	--
Can annotate faxes.	x	x	--
Can move faxes.	x	x	--
Can route faxes.	x	x	--
Can annotate faxes with personal stamp	x	x	--

Delete permissions

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

Miscellaneous permissions

	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. This 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, then busy condition
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, but no answer tone
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.

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

<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.

  📄 **Note:** 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.

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 87.

  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 Faxdoes 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.

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

Inserts any information; is commonly used for troubleshooting. It has no effect on the document.

Syntax {{note*text***}}**

{{note This came from the PO system}}

The example inserts "This came from the PO system" into the FCL but not into the finished document.

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

Controls the number of times the server will retry sending a fax.

Valid entries are 1 to 255. You must also set a value for the RETRYINTERVAL command if you set a value for RETRYCOUNT.

You can place this command anywhere in the FCL document.

Syntax {{retrycount <*n*>}}

{{retrycount 4}}

This example sets the retry count to 4.

12.43 RETRYINTERVAL

Controls the interval (in minutes) that the server will wait between each attempt to resend a fax.

Valid entries are 1 to 255. You must also set a value for the RETRYCOUNT command if you set a value for RETRYINTERVAL.

You can place this command anywhere in the FCL document.

Syntax {{retryinterval <*n*>}}

{{retryinterval 7}}

This example sets the interval between attempts to 7 minutes.

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

Specifies the name of a graphic file of a signature that appears in the document. The signature must be created and saved as a graphic file.

Syntax {{signature<*filename*>}}

{{signature FredJones.tif}}

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.>

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