RightFax Client Overview (FaxUtil)

RightFax Client Applications
  o RightFax FaxUtil Overview
  o RightFax Printer Driver Overview
  o RightFax SysTray Icon Overview
  o RightFax Viewer Overview

Creating and sending Faxes with RightFax
  o Print-To-Fax
  o Creating a “Quick Fax” from FaxUtil
  o Viewing Multiple RightFax Fax Inboxes in FaxUtil
  o Configuring Delegates in RightFax FaxUtil
  o Viewing Faxes in FaxUtil
  o Routing Faxes to Users in the RightFax Viewer
  o Forwarding Faxes to Users in the RightFax Viewer

Other Useful RightFax FaxUtil Features
  o Assigning From Information to an Inbound Fax
  o Combining Faxes
  o Splitting Faxes
  o Record Manual Fax
  o Forwarding a Fax via Email
  o Creating and Using Signature Image Files
  o Creating and Using Library Documents
  o Creating and Using Letterheads and Logos

RightFax Client Applications for Outlook
  o Outlook Client Application Overview
  o Sending Faxes from Microsoft Outlook
  o Receiving Inbound Faxes in Microsoft Outlook
  o Monitoring Outbound Faxes from Outlook
  o Sending Faxes from Microsoft Outlook Web Access (OWA)

Web Access Options:
  o RightFax Web Access (RWA)
  o Microsoft Web Access (OWA)
**RightFax FaxUtil Overview**

FaxUtil is the client for the RightFax fax server software by Captaris. FaxUtil allows users to send, receive and manage faxes on their PC.

Click the RightFax TrayFax icon in your Windows taskbar; select FaxUtil from the main menu.

---

**Sorting Faxes:** Users can sort faxes many different ways in their FaxUtil mailbox. Much like e-mail, your faxes can be sorted in RightFax FaxUtil by simply mouse clicking on the column header in the FaxUtil mailbox. If you want to see a certain type of fax in the mailbox, like all the "received" faxes, go to the **List** menu on the FaxUtil menu bar and select the type of faxes you want to view:

- Full List (All faxes in mailbox)
- In-Progress Faxes
- Sent Faxes
- Faxes Needing Approval
- Received Faxes
- New Faxes
- Received Faxes and In-Progress Faxes

---
Viewing Multiple RightFax Fax Inboxes in the FaxUtil Client Using The Delegates Feature

RightFax administrators, group administrators, and delegates all have the ability to view the contents of other RightFax users’ mailboxes.

The RightFax ‘delegates’ feature is typically used when users in a group, department or office need to manage not only a their personal RightFax inbox, but they are also responsible for managing and processing faxes that are routed into a/the group, department or office fax inbox. If you have the ability to view other mailboxes, an Other Users entry is included in your FaxUtil folder tree as seen below.

1. Click the + next to Other Users in the folder tree to expand the list. The list may include both RightFax groups and individual mailboxes. Continue to expand the tree as necessary until you have listed the folders in the mailbox you want.
2. Click a folder to view its contents.

![Figure 3: RightFax FaxUtil Mailbox](image-url)
Configuring Delegates in RightFax
The delegates feature in RightFax allows a user to assign rights to another user for fax inbox monitoring. Using the following instructions to assign delegates from FaxUtil.

1. Select TOOLS>Delegates to get the DELEGATES window.
2. In the Delegates window, highlight the user(s) you want to have delegate rights to your RightFax FaxUtil inbox.
3. Use the ROLE based option drop down to select what rights the each user should have, or you can select the rights individually.
4. Click OK to save your changes.

![Figure 4: RightFax FaxUtil Mailbox](image-url)
**Viewing Faxes in FaxUtil**

You can view inbound and outbound faxes by simply double clicking on the fax item in FaxUtil client application, much like email messages. The RightFax view will launch showing the actual image of the fax. Below we list a number of features and tools that can be used to view, manage and annotate the fax.

![RightFax Viewer](image)

- **Save changes**
- **Print fax**
- **View fax history**
- **Trash this fax**
- **ROUTE Fax**
- **FORWARD fax**
- **Zoom in**
- **Zoom out**
- **View next pages in this fax**
- **Rotate fax left/right**
- **Add text**
- **Draw tools**
- **Add annotation**
- **Draw selection box**
- **Pan fax**
- **Page Width View**
- **Auto zoom tools**

Figure 5: RightFax Viewer
Routing Faxes to Other Users from the RightFax Viewer Application
RightFax users can ROUTE faxes to other users through the RightFax software. Routing the fax sends the fax to the intended user(s)/recipient(s) and removes the fax image from the sending user’s RightFax fax inbox. This feature should be used if/when the user has no need to retain a copy of the fax for their records.

1. From the RightFax Viewer, click on the ROUTE fax button in the button bar. The second “mailbox” looking button from the left.
2. In the “Route Fax” window double click the user or users you want to ROUTE the fax to. Or you can highlight the user and click the ADD button.
3. Click OK to ROUTE the fax.

![Figure 6: RightFax FaxUtil Mailbox](image)

**PLEASE NOTE:** Users can also ROUTE and FORWARD faxes directly from the FaxUtil inbox window.
Forwarding Faxes to Other Users from the RightFax Viewer Application

RightFax users can also FORWARD faxes to other users through the RightFax software. Forwarding the fax sends the fax to the intended user(s)/recipient(s) and a copy of the fax image is retained in the sending user’s RightFax fax inbox. This feature should be used if/when the sending user wants to save a copy of the fax for their records.

1. From the RightFax Viewer, click on the FORWARD fax button in the button bar. The first “mailbox” looking button from the left.
2. In the “Forward Fax” window double click the user or users you want to FORWARD the fax to. Or you can highlight the user and click the ADD button.
3. Click OK to FORWARD the fax.

Figure 7: RightFax FaxUtil Mailbox

PLEASE NOTE: Users can also ROUTE and FORWARD faxes directly from the FaxUtil inbox window.
Creating and Sending a Fax

There are many different ways to send faxes with RightFax. The most common of all is printing from your office applications like Microsoft Word, Excel, and PowerPoint using the RightFax Fax Printer. Additionally, you can use the “New Fax” button on the FaxUtil menu bar or the QuickFax feature from the RightFax Tray Icon to create a fax by attaching applications files.

![Image of Fax Information Dialogue Box Main Tab]

Faxes are addressed and scheduled here on the Main tab

The Main Tab

To Section

Bolded lettering in the TO section means the fields are required and must be populated with recipient’s information in order to send the fax. In the example above, the user only needs to enter the recipient’s Name and Fax Number. Voice Number, Company, City/State and Alternate Fax are optional. Users can send to multiple recipients by selecting multiple fax addresses from the phonebook.

Phonebook: Clicking this button allows users to access the RightFax phonebook to address a fax for delivery. This button will also allow the users to access Microsoft Outlook Address Book and other types of databases like GoldMine, ACT!, Maximizer, and Lotus Notes.

Add Entry: This button allows users to add fax address information to the RightFax phonebook. After populating the Name, Fax Number, Voice Number, Company, City/State, and Alternate Fax fields, users can click the Add Entry button to add that recipient’s information to the RightFax Phonebook for future use.

Lookup: Allows users to access stored Billing Codes when billing codes are required to send faxes. Billing codes are typically accessed from an accounting system. RightFax does allow users to create and store billing code databases with RightFax.
Options Section

**Fine Mode:** Check this box to deliver your fax in 200x200 DPI resolution. Using this resolution take longer to generate and send the fax but produces a very clear fax. Use fine mode when faxing documents with fine lines, charts, graphs and graphics.

**Use Cover Sheet:** Adds a cover sheet to the beginning of a fax. Cover sheets are used to add additional notes, instructions or actions for the recipient to read. Cover sheets also help to make sure faxes get to the correct contact at the recipient’s company.

**Hold for Preview:** Lets you examine the final version of the outgoing fax before you send it. The fax will be held in your FaxUtil mailbox with the status “Held for Preview”. To send the fax from FaxUtil, right mouse click on the fax that you want to release and select STATUS and then RELEASE. The fax will start to deliver.

**Use Smart Resume:** Smart resume is used when delivering lengthy fax documents. This feature allows the RightFax fax server to intelligently resend only the portion of a fax, which failed to send. For example, if the connection were broken after 10 pages of a 20-page fax delivery, normally all 20 pages would have to be resent. By enabling Smart-Resume, the fax server will only send the last 10 pages.

**Use Cheap Rates:** Tells the RightFax fax server to delay sending the fax until well after business hours. This is typically used for non-critical faxes to take advantage of lower, off-peak long distance rates.

**Delay Send:** Allows users to schedule the delivery of a fax for a specific date and time in the future.

Accounting Section

**Billing Codes:** RightFax supports the use of two billing codes for each fax delivery. Billing codes are typically used for tracking customer or client information, tracking fax usage by user, business unit, department or division.
The Cover Sheet Notes Tab

Click on the Cover Sheet Notes tab to enter information you would like to appear on the cover sheet of your fax.

![Fax Information Dialogue Box Cover Sheet Notes Tab](image)

**Notes to be Placed on the Cover Sheet Field**

Type the notes you want to appear on your fax cover sheet. You can enter up to 21 lines.

**Text Limit Section**

This displays the current number of lines in your note and the number of lines remaining. Although it is possible to enter more than 21 lines of text, only 21 can be displayed on the cover sheet. If you exceed 21 lines, the computer will beep and an error message will appear in the box.

**Comments for your Records Field**

This is a comment field that is used for your own reference. This text is not sent to the recipient. Text in this field will be displayed in your FaxUtil mailbox (Figure 1) under the Comments column.
The Attachments Tab

When sending faxes you can attach two types of files: RightFax Library Document and native documents. Library documents are frequently requested documents your administrator has stored on the RightFax server for use with outbound faxes. These types of documents are usually static documents like legal disclaimers, order forms, and credit card forms. Users can also include native document files like Word, Excel, PowerPoint, and PDF files (The RightFax PDF Optional Module must be installed on the RightFax server to convert attached PDF files).

**Figure 10: Fax Information Dialogue Box Attachments Tab**

The Available Attachments shows all of the RightFax Library Documents users can include in their faxes. This window shows the selected attachments for this fax. The type of attachment is identified by the icon next to it.

This button allows users to attach application files like Word, Excel, PowerPoint, and PDF files as long as the RightFax server is running the PDF Optional Module.

This button allows you to attach Library Document stored on the RightFax server.

Files can be sorted so attachments appear in the page order you choose.

Delete a highlighted attachment.

Highlighting an attached file and clicking this button will allow you to open and view the attached document.

**ATTENTION:** The RightFax PDF Converter Module is required in order to attach Adobe Acrobat PDF Files and PostScript files to outbound faxes. Please contact you Advantage Technologies representative for pricing and availability.
The More Options Tab

More Options Section

- **Use Form:** Select this check box to add an overlay form to your fax. Typically this feature is used for overlaying a fax on your company letterhead. Other uses include invoice and purchase order forms.

- **Cover Sheet File:** If your fax server administrator granted you permission to change fax cover sheets, you can select the cover sheet model to use here.

- **Priority:** Specifies the level of priority assigned to a fax. Select low, normal, or high priority from the list. This area may not be available to you based on the profile your fax user permissions.

- **Automatic Deletion:** Specify when, if ever, sent faxes should be automatically deleted from your FaxUtil mailbox. This should typically be set to never.

- **Recipient Fax ID:** Optionally specify the exact remote ID of the intended recipient's fax machine or server. When this feature is enabled, the fax will not be sent unless the remote ID of the recipient's fax machine matches the specified Recipient Fax ID.

From Section

The fields in the From section of this window should be populated with your contact information. Depending on the fields your RightFax administrator included on your organization's cover sheet, this data will automatically populate the corresponding fields.

![Figure 11: Fax Information Dialogue Box More Options Tab](image-url)
Other Features

Assigning From Information to an Inbound Fax
In many cases inbound faxes are received with out information from the sending fax device, as a result of the owner of the fax not programming the CSID (Caller Station ID) of the fax machine they are sending a fax from.

RightFax FaxUtil, and specifically the RightFax Viewer, provides features that allow the end user to assign from information to these faxes.

Very often, and most commonly in the health care industry, information needs to be added or assigned to a fax. Information like the physician’s name their phone number, patient information or ID can all be added to a fax.

Users can then use the Sort and Filter Features to locate faxes easily, accurately, and quickly.

Figure 11a: Locate the fax that information needs to be added to and double click to launch the fax in the RightFax View application. In this example, notice the column heading above and the highlighted fax does not contain, show or include the sending fax machine’s information. This information can be added from the RightFax View drop down menu.

Figure 11b: Now with the fax in opened in the RightFax Viewer, left click on FAX in the menu bar and select Assign From Information. This will launch the Assign Sender Information screen as seen in Figure 11c on the next page.
Assigning From Information to an Inbound Fax (Continued)

**Figure 11c:** In this window users can key in the information they need to assign to the fax. In this example we’ve assigned Dr. Paterno, her voice number, and information to the RightFax Billing Code 1 and Billing Code 2 Fields. For this particular user, the billing code fields were renamed to Client ID and Actual Fax # to be more in-line with the information that needed to be assigned or captured with this inbound fax and the user’s fax process and flows.

**Figure 11d:** After the user clicks OK in the Assign Sender Information window, the fax data fields in FaxUtil will now include the information that was entered for this fax. Hit the Refresh Button in the button bar will allow the user to update faxes in the queue and will update the fields if the information is not seen immediately.
**Combine Faxes:** Users can also combine faxes in from the FaxUtil mailbox. In some cases users may have the need to take two, three faxes or more and make them into one fax for delivery to a user on the network or to fax address. To combine faxes follow these steps:

1. Using the CRTL left mouse click feature on your PC, select the faxes you want to combine in the FaxUtil mailbox.

2. You can then right mouse click on the on the highlighted faxes and choose Combine from the pop-menu, or click the Combine button on the FaxUtil button bar.

3. In the combine pop-up window make select you choices.

4. Click the Combine button to complete process. A new fax will appear in the FaxUtil mailbox.

![Figure 12: Combine Faxes Window](image)

- Highlight and choose the page range for each fax
- Remove a fax(es)
- Faxes can be sorted so they appear in the page order you want
- Highlighting a fax and clicking this button will allow you to see the actual fax in the RightFax Fax Viewer
Split Fax: At times users may receive a group of faxes from a sender that need to be broken apart into separate faxes. Or, there may be times when you want to add a page or two from one fax and include it with a new fax. Users can access the split fax feature by highlighting and right mouse clicking on the fax that needs to be split and selecting the Split. In the Split Fax window choose your options.

![Split Fax Window](image)

**Figure 13: Split Fax Window**

Record Manual Fax: RightFax allows you to store data and information regarding faxes that are sent from manual fax machines. Sometimes users still have to send faxes from a manual fax machine, but need to have RightFax store the historical information regarding the manual fax delivery. To record a manual fax in RightFax simply got to the FAX menu on the FaxUtil menu bar and select RECORD MANAUL FAX, enter the information regarding your manual fax delivery, and click ok. Your fax is now recorded and stored in the RightFax database.

Forwarding Faxes Via Email: Faxes in the FaxUtil can be forwarded to an e-mail address. While viewing fax in the RightFax Viewer window, go to the File menu and select Send via E-Mail. This will launch the mail client and you can now select the e-mail address(es) you want to send the fax to. Please note, this features only works with MAPI compliant mail clients like Outlook and Outlook Express and will not work with Notes clients.

Library Documents: RightFax allows you to store frequently requested documents. These are generally static documents such as company literature, credit applications, or employee forms. Once stored, RightFax Library documents can be recalled and added to you outbound faxes. This allows you to deliver important documents quickly, with minimum system resources.

Letterheads: Users can create letterheads and other forms. Letterheads can be created in a word processor program like Microsoft Word, adding graphics and company information and printing the letterhead template to the RightFax Fax Printer under Printers. This is a very simple process.
Sending Faxes from Microsoft Outlook Web Access (OWA)

Users can send and receive faxes via the Microsoft Outlook Web Access application. This requires one of the RightFax email gateways to be installed and configured for the RightFax system.

**Figure 14: Sending a Fax from OWA**

Users can send faxes from OWA using fax addressing schemes. This sample fax addressing scheme is used for the RightFax Exchange Module and the RightFax SMTP Email Gateway.

Users can attach files to be sent with their outbound fax.

Users can include a message in the body of the email. The “body” of the email will become the first page of the fax after the cover sheet.

**Figure 15: Fax Delivery Notification in OWA**

RightFax can be configured to notify user by email on the success or failure of their outbound faxes delivery.

In Figure 15, RightFax has been configured to also include a copy of the user’s outbound fax with the delivery notification.
Viewing Inbound Fax Attachments in Microsoft Outlook Web Access (OWA)

Users can receive faxes into their Outlook email inbox and then can view them from within the Microsoft Outlook Web Access application. This requires one of the RightFax email gateways to be installed and configured for the RightFax system.

Like working with email attachments, users simply double click on the attached file that is included in with the inbound fax email message, where they can view the fax as either a .tif or .pdf file. Figure 16 shows the fax image being viewed as a .pdf file.

![Figure 16: Viewing a PDF Fax Attachment from within OWA](image)

Want to Learn More About RightFax Products and Features in this Guide

Advantage Technologies, Inc. is a leading integrator of fax server and automated document delivery solutions. RightFax is our premier product line. Please contact us TOLL FREE at 1-866-730-1700 to learn more about the features discussed in this guide and how to configure them. Advantage offers a complete series of certified professional services for RightFax including, onsite and remote access installation and configuration, technical and administrator training, end user training, onsite and remote access system assessment, and project planning consulting services.

© 2010 Advantage Technologies, Inc. At rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language in any form by any means without the written permission of Advantage Technologies, Inc. All other company, brand, and product names are the property and/or trademarks of their respective companies.