

**OPENTEXT™**

**OpenText RightFax 16 EP2**

**Sending a Fax**

**Quick Reference User Guide**

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## **Edition**

OpenText RightFax 16 Enhancement Pack 2 Sending a Fax

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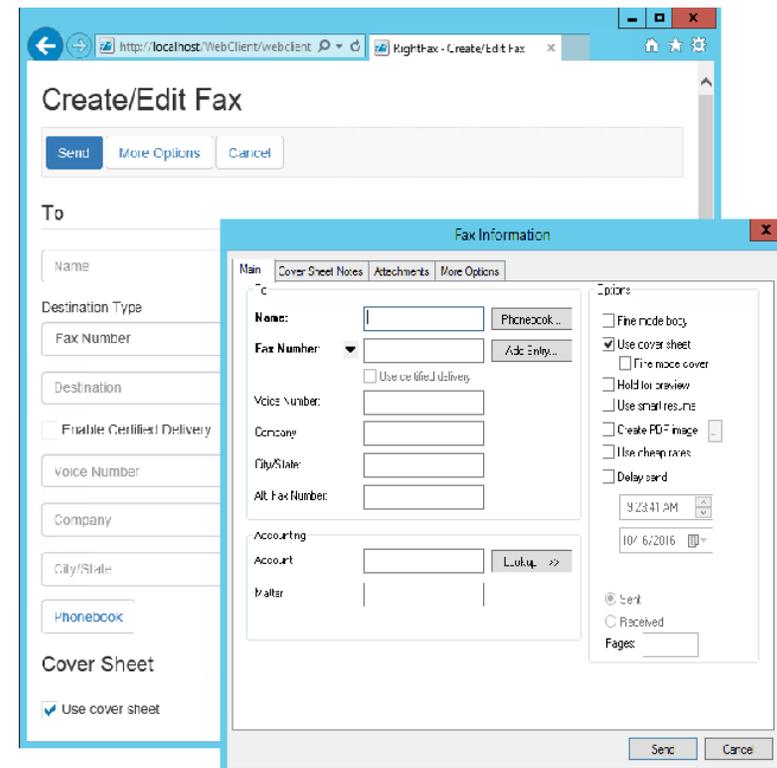
## Chapter 1: Sending a fax

You can use any of the following methods to send a fax through the RightFax server:

- Create and send a fax by opening your fax mailbox in either:
  - Windows-based **RightFax FaxUtil** or
  - Browser-based **RightFax Web Client**.
- Send a fax without opening your mailbox by:
  - Selecting the **Quick Fax/Broadcast** option from the RightFax shortcut menu in the notification area of the taskbar.
  - Printing to the **RightFax Fax Printer** from an external program such as Microsoft Word.
  - Using the **Send to** option from Windows Explorer.
- If you use email gateway modules, you can create a fax as an email message and fax it directly from your email mailbox. For information on faxing from your email client application, see the *RightFax Administrator Guide* and the *RightFax Connector for Microsoft Exchange Administrator Guide*.

After selecting to send a fax, you are prompted to enter the required addressing information, attach additional files or library documents, change the cover sheet, add notes, and specify other sending options. Some of the information may already be filled in.

From Web Client, the **Create/Edit Fax** page opens. All other sending methods open the **Fax Information** window.



This quick reference guide illustrates adding the fax information in the Fax Information window. For information about doing so in the

Create/Edit Fax window of RightFax Web Client, see the *RightFax Web Client Help*.

## Faxing from your fax mailbox in FaxUtil or Web Client

For more information about using your mailbox see the *RightFax FaxUtil Help* or the *RightFax Web Client Help*.

### To open your fax mailbox

Do one of the following:

- On a computer with RightFax FaxUtil installed, on the **Start** menu, click **All Programs**, click **Open Text**, and then click **FaxUtil**, or
- In a browser on any computer or mobile device with internet access, go to `http://<host>/WebClient/webclient.dll/?`.

### To create a fax

1. Click **New Fax**.
2. In the **Fax Information** window in FaxUtil or the **Create/Edit Fax** page in Web Client, enter the required addressing information. As needed, specify cover sheet notes, attach additional files or library documents, and specify other sending options.
3. Click **Send**.

### To forward a fax to a fax number or email address

1. Select the fax or faxes in the list, and then click **Forward to Fax**. (On the **Actions** menu in Web Client).
2. In the **Fax Information** window in FaxUtil or the **Create/Edit Fax** page in Web Client, enter the information for sending the fax. To forward to multiple recipients select a phone book group.
3. Click **Send**.

### Forward or route a fax to another RightFax user on your network

1. Click the fax in the list, and then click either **Forward to User** or **Route to User**.
2. In the **User selection** list, select the user, and then click **Add**. Repeat as needed to forward or route to multiple users. Alternately, in the **Destination users** box, type the RightFax IDs separated by commas.
3. In the **Notes added to fax history** box, enter any notes you want to add to the document history.
4. To send the fax, click **OK**.

## Faxing a document from the program used to create it

If your installation includes the Print Driver component, you can fax any document directly from the program used to create it.

### To send a fax from a program

1. Create a document in a program that accepts text characters and has the ability to print to a network printer. For supported file types, see
2. As needed, add embedded codes. For more information, see the *RightFax Administrator Guide* or *RightFax FaxUtil Help*.
3. Print the document to the **RightFax Fax Printer**.
4. In the **Fax Information** window, enter the required addressing information. As needed, specify cover sheet notes, attach additional files or library documents, and specify other sending options.
5. Click **Send**.

## Faxing using Quick Fax/Broadcast

You may have to show the RightFax icon (RightFax Fax Ctrl Module) in the notification area of the taskbar. See [Configuring the RightFax Fax Control module \(FaxCtrl.exe\) on page 13](#).

### To send a new fax using Quick Fax/Broadcast

1. On the taskbar, in the notification area, right-click the RightFax icon.
2. On the shortcut menu, click **Quick Fax/Broadcast**.
3. In the **Fax Information** window, enter the required addressing information. As needed, specify cover sheet notes, attach additional files or library documents, and specify other sending options.
4. Click **Send**.

## Faxing using Send To from Windows Explorer

If configured, you can send existing files directly from Windows Explorer without having to open your fax mailbox.

### To use the Send To function

1. Open the folder containing the file to fax and right-click the file icon.
2. On the shortcut menu, point to **Send To**, and then click **Fax Destination via RightFax**.
3. In the **Fax Information** window, enter the required addressing information. As needed, specify cover sheet notes, attach additional files or library documents, and specify other sending options.
4. Click **Send**.

## Chapter 2: Completing the fax information

You enter all information for sending a fax on the tabs of the **Fax Information** window.

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

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

### Entering the fax destination

On the **Main** tab, under **To**, select the destination from your phone book or enter it manually.

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

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

the SecureDocs module.

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

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

The screenshot shows the 'Fax Information' window with the 'Main' tab selected. The 'To' section includes fields for Name, Fax Number (with a dropdown arrow), Voice Number, Company, City/State, and Alt. Fax Number. There are 'Phonebook...' and 'Add Entry...' buttons. The 'Accounting' section has fields for Account and Matter, with a 'Lookup >>' button. The 'Options' section on the right contains several checkboxes: 'Fine mode body' (checked), 'Use cover sheet' (checked), 'Fine mode cover' (checked), 'Hold for preview' (unchecked), 'Use smart resume' (unchecked), 'Create PDF image' (unchecked), 'Use cheap rates' (unchecked), and 'Delay send' (unchecked). Below these are time and date pickers set to 2:30:48 PM and 11/14/2016. At the bottom, there are radio buttons for 'Sent' (selected) and 'Received', and a 'Pages:' field. 'Send' and 'Cancel' buttons are at the bottom right.

To select a destination from a phone book

1. Click **Phonebook**.
2. Double-click an entry to add it to the **Current Recipients** list. If you cannot see the entry, type a complete or partial ID in the **Type ID or select from list** box.
3. For email destinations, to send a link to the fax rather than the fax, select the **Certified Delivery** check box. You will be notified when the fax has been viewed.
4. Repeat the above step as needed to add multiple recipients, and then click **OK**. The addressing information associated with the selected entry or entries appears on the **Main** tab. If you selected multiple entries, the number of fax recipients appears as fax(*n*), where *n* is the number of recipients.

#### To enter a fax number destination

1. In the **Name** box, enter the name of the recipient.
2. To change the destination type, click , and then select **Fax Number**.
3. In the **Fax Number** box, enter the fax number. You can enter the number with or without hyphens, parentheses, or spaces.
4. As needed, enter optional contact information for the recipient in the **Voice Number, Company, and City/State boxes**.

#### To enter an email destination

1. In the **Name** box, enter the name of the recipient.
2. To change the destination type, click , and then select **E-mail Address**.
3. In the **E-mail Address** box, enter the email address.
4. To send a link to the fax rather than the fax, select the **Certified Delivery** check box. You will be notified when the fax has been viewed.
5. As needed, enter optional contact information for the recipient in

the **Voice Number, Company, and City/State boxes**.

#### To use post-dialing

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

### Assigning billing codes

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

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

#### To enter billing codes

- On the **Main** tab, under **Accounting**, enter a code in the **Account** box, in the **Matter** box, or both. You may also be able to select billing codes from a list:
  - a. Click **Lookup**.
  - b. In the the **Description, Account, or Matter**, box, enter the characters by which to search.
  - c. Click **Search**, and then double-click a billing code to select it.

## Customizing transmission options

### Customizing options on the Main tab

On the **Main** tab, under **Options**, you may be able to customize transmission options for the current fax. Your user account permissions determine if you can change the settings set by your fax administrator.

**Note** Some options, such as using 200x200 DPI resolution, may impact the time it takes to generate and send the fax.

#### To customize how the fax is transmitted

- Select or clear any of the following check boxes:
  - **Fine mode body.** Select to create the body of the fax using 200 x 200 dots per inch (DPI) resolution.
  - **Use cover sheet.** Select to use the default cover sheet for the fax. Depending on your user account permissions you may be able to select a different cover sheet in the Cover Sheet File list on the More Options tab.
  - **Fine mode cover.** Select to create the cover sheet using 200 x 200 dots per inch (DPI) resolution.
  - **Hold for preview.** Select to hold the fax in a status of *Held for Preview* until you release it to be sent.
  - **Smart resume.** Select to only resend the portion of the fax that failed in case errors occur during transmission.
  - **Create PDF image.** Select to store a PDF of the fax on the sender's server (fax number recipient) or to send the fax as PDF (email recipient):
    - If sending to a fax number, the recipient will receive a conventional fax, while you can view the PDF image when viewing the sent fax.
    - If sending to an email address, the recipient will receive a

PDF file or a link to the PDF file (if certified delivery is selected). By default this PDF file is rendered in black and white and not editable.

- To password protect (encrypt) the PDF file, click  and enter the password and actions the recipient should be able to perform after entering the password. Encrypted PDF files are editable and rendered in color, as applicable.

The creation of PDF images requires the optional PDF module. For more information, see the *RightFax Administrator Guide*. The ability to encrypt the PDF files requires the optional SecureDocs module. For more information, see the *RightFax SecureDocs Module Administrator Guide*.

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

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

#### To change the cheap rates time

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

#### To delay sending until a specified date and time

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

### Customizing options on the More Options tab

Additional transmission options can be set on the **More Options** tab.

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

## phone

- In the Recipient Notify Address box, enter their SMS number.

## To restrict sending to a specific fax machine

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

## To adjust the quality of the conversion

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

## To change the priority for the fax

- In the **Priority** list, select one of the following:
  - **Normal** to queue the fax in the order it is sent.
  - **Low** to move the fax to the end of the send queue on the fax server.
  - **High** to move the fax to the front of the send queue on the fax server. This option is available if you have the appropriate permission.

## To change the automatic deletion setting for the fax

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

- To never delete, click **Never**.
- To delete after the fax was successfully sent, click **After Successfully Sent**.
- To delete the fax independent of whether it is sent successfully, click **Always**.

## Entering cover sheet notes

On the **Cover Sheet Notes** tab, you can add notes that will appear on the cover sheet of the current fax and add a comment that you can expose in the fax list of your fax mailbox.

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

## To add notes to the cover sheet

- In the **Notes to be Placed on the Cover Sheet or in SMS Message** box, type text that should appear on the cover sheet of the fax. As you type, the **Text Limit** box shows how many lines of text you have typed so far. Only 21 lines fit on the cover sheet.

## To add comments for your own use

- In the **Comments for your Record** box, enter a comment for your own use. This text will appear in the Comments column and it will not be sent to the recipient.

## Customizing cover sheet options

On the **More Options** tab, depending on your user account permission, you may be able to preview the selected cover sheet file and change the file for this fax. the appropriate permission.

## To preview a cover sheet file

- In the **Cover Sheet File** list, select the file, and then click **View**.

### To select a different cover sheet file

- In the **Cover Sheet File** list, select the file. You can change cover sheet files only if you have been granted permission to do so by the fax administrator.

### To customize your contact information on the cover sheet

- Under **From**, enter your contact information as you want it to appear on the cover sheet.

## Attaching files, library documents, or documents scans

On the **Attachments** tab, you can:

- Attach files that still need to be converted to fax format.

**Note** To broadcast a fax to a large number of recipients, attach library documents rather than files.

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

- Library documents that have already been converted
- Documents from a TWAIN32-compliant connected to your computer.

The attachments will be appended to the cover sheet in the order they appear, unless you change their position in the list.

### To attach a file

1. Click .
2. Browse to where the file is located.
3. Select the file, and then click **Attach**. The file appears in the list

of attachments.

### To attach a library document

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

### To acquire an attachment from a scanner

1. Click .
2. In the **Document Scan** window, in the **Current Scanner** box, select the scanner, and then click **Start Scan**.
3. Scan the document according to your scanner's operating instructions. After the document has been scanned, it appears in the list of attachments.

### To change the order of the attachments

- Click the row of the attachment you want to move, and then click  or .

### To exclude an attached file from being converted to fax format

This option is only available if sending to an email destination.

- In the row of the attachment, select the check box in the **Native** column.

### To render an attached file as the body of your email

This option is only available if sending to an email destination.

When you select to render an attached file as the body of your email, the file is automatically excluded from being converted 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.
2. 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
3. Right-click any of the column headers of the attachments list, and click **Advanced Columns**.
4. In the row for each alternate body file attachment, select the check box in the **Alt. Body** column.

#### To delete an attachment

- Click the row of the attachment, and then click .

#### To view an attachment

- Click the row of the attachment, and then click .

## Chapter 3: Configuring the RightFax Fax Control module (FaxCtrl.exe)

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The RightFax Fax Control Module (FaxCtrl.exe) is installed as part of the RightFax client installation in Program Files (x86)\RightFax\Client\.

If you did not install the Open Text Printers (RightFax PostScript Printer Driver) during the installation, you may need to obtain a PCL or PostScript driver and then create a RightFax Fax Printer.

### To create a RightFax Fax Printer

1. On the taskbar, in the notification area, right-click the RightFax icon, and then click **Configuration**.
2. Click **Create Fax Printer**, and depending on the type of printer you want to create, click **Create PCL Fax Printer** or **Create PostScript Fax Printer**. You may have to obtain a driver for the type of printer you want to create.
3. In the **Please enter the name of the printer to create** box, enter the fax server, and then click **OK**.
4. In the **Please enter the name of the fax server**, enter the connection information for the printer, and then click **OK**.

### To show the RightFax icon in the notification area

1. Open the taskbar properties, Under Notification area, click **Customize**.
2. Next to **RightFax FaxCtrl Module**, select **Show icon and notifications**.

### To configure the RightFax Fax Control module

1. On the taskbar, in the notification area, right-click the RightFax icon, and then click **Configuration**.
2. In the **Fax Server Name** box, enter the server name.
3. In the **Protocol** list, select **TCP/IP**, **Secure TCP/IP**, or **HTTP**.
  - If you select HTTP, enter the proxy server configured in the RPC over HTTP component in the **Proxy Server** box, .
4. In the **Login Method** list, select **Use NT Authentication**, **Use Network Login ID**, or **Use Specified Login ID**.
  - If you select Use Specified Login ID, in the **User ID** box, enter the user ID.
5. To display FaxCtrl and FaxUtil in a language other than English, in the **Language** list, select the language.
6. In the **Tray Icon Double-click** list, select **Launch Quick Fax/Broadcast** or **Launch FaxUtil** to specify which feature to activate when the user double-clicks the tray icon.
7. Select the **Combine print jobs into a single fax** check box to enable batch printing when using Quick Fax/Broadcast, Send To from Windows Explorer, and when printing to the RightFax Printer from another program.

While the Fax Information window is open, each document and file sent to the RightFax Printer is added to the list on the

Attachments tab. Users can change the order and delete files as needed before sending the fax.