

# RightFax Web Client User Guide

The RightFax Web Client is a powerful tool that can be accessed by users to send and receive faxes.

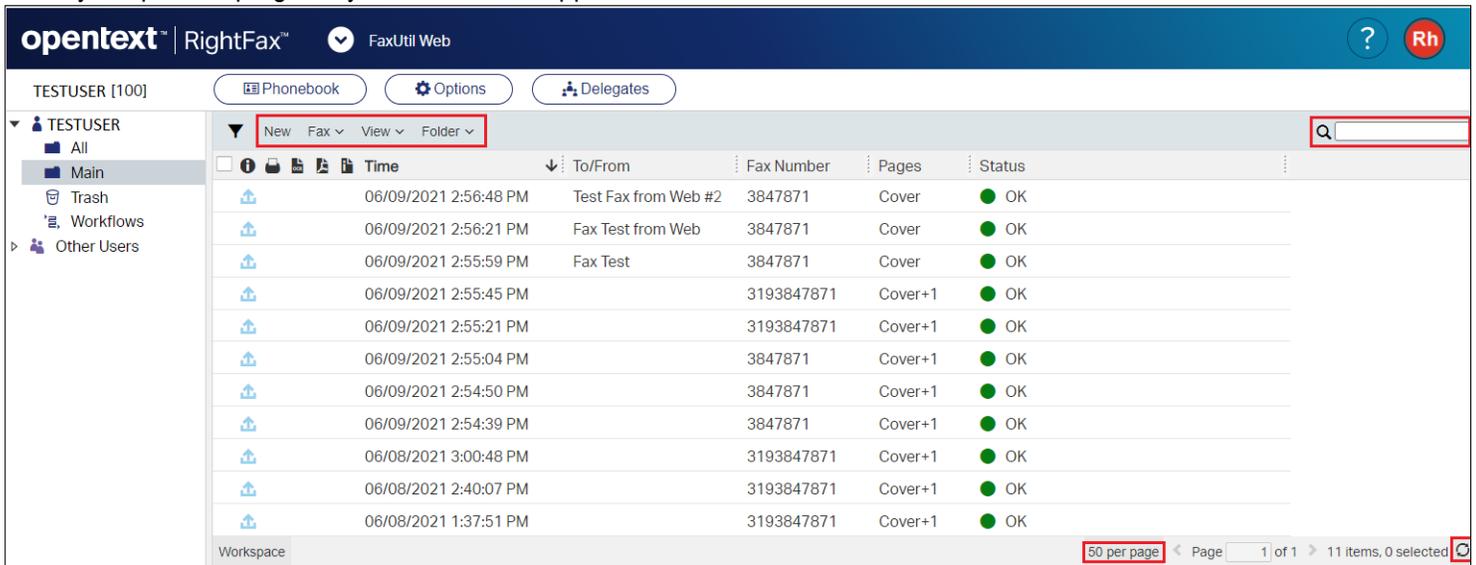
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# Getting started

RightFax Web Utility 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.



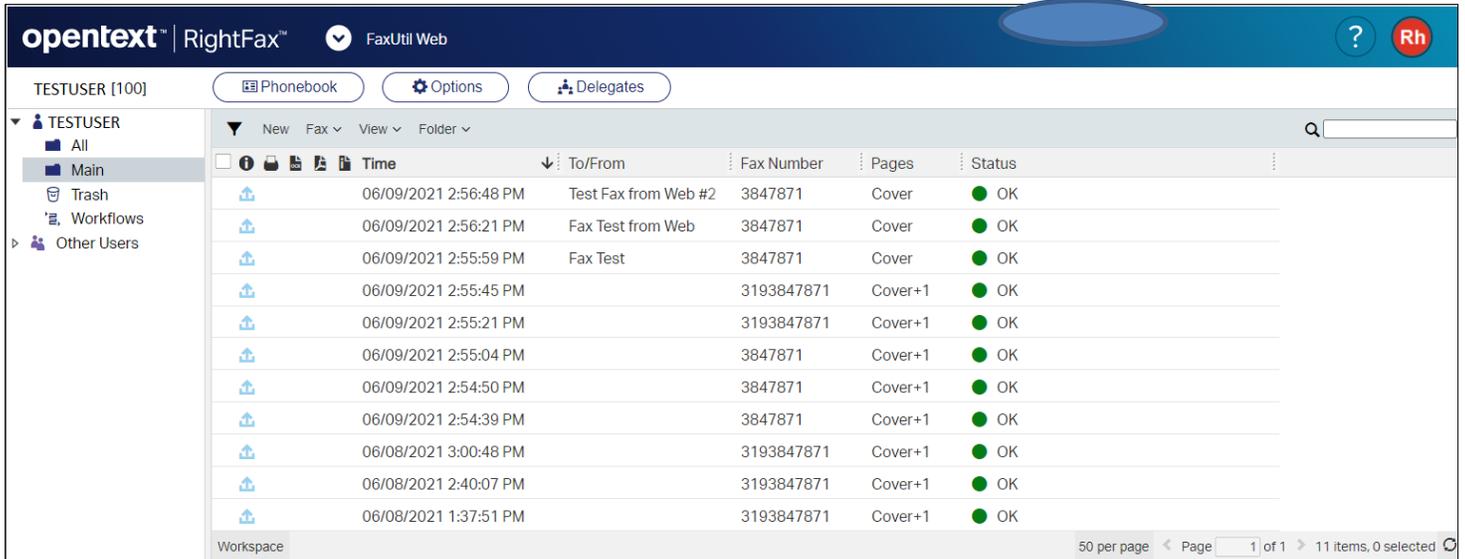
The left pane shows the available folders that contain faxes. The right pane shows the list of faxes within the selected folder. Flags show the action taken on each fax, and status indicators show the current status of the fax.

| Fax flags  | Status indicators   |
|--|---|
| Fax was received.  | Fax is being processed for transmission.                              |
| Fax was sent.  | Fax has been transmitted.   |
| Fax was printed.   | Fax has not been transmitted due to an error. It will be retried.     |
| Fax was converted to text using optical character recognition (OCR). | Fax has not been transmitted due to an error. It will not be retried. |
| Fax was converted to PDF.  |   |
| Sent fax was forwarded to another RightFax user.                     |   |
| Received fax was forwarded from another RightFax 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.  |   |

## Accessing RightFax

To access the RightFax Web Client use the following link (it is recommended that you create a shortcut or favorite with this link), <https://fax.uiowa.edu>.

**\*\* If you are logged into a healthcare machine with your healthcare id and password, RightFax should automatically log you in. \*\***



The screenshot shows the RightFax Web Client interface. The user is logged in as 'TESTUSER [100]'. The interface includes a navigation menu on the left with folders like 'All', 'Main', 'Trash', 'Workflows', and 'Other Users'. The main area displays a list of faxes with columns for Time, To/From, Fax Number, Pages, and Status. The status for all listed faxes is 'OK'.

| Time                  | To/From              | Fax Number | Pages   | Status |
|-----------------------|----------------------|------------|---------|--------|
| 06/09/2021 2:56:48 PM | Test Fax from Web #2 | 3847871    | Cover   | OK     |
| 06/09/2021 2:56:21 PM | Fax Test from Web    | 3847871    | Cover   | OK     |
| 06/09/2021 2:55:59 PM | Fax Test             | 3847871    | Cover   | OK     |
| 06/09/2021 2:55:45 PM |                      | 3193847871 | Cover+1 | OK     |
| 06/09/2021 2:55:21 PM |                      | 3193847871 | Cover+1 | OK     |
| 06/09/2021 2:55:04 PM |                      | 3847871    | Cover+1 | OK     |
| 06/09/2021 2:54:50 PM |                      | 3847871    | Cover+1 | OK     |
| 06/09/2021 2:54:39 PM |                      | 3847871    | Cover+1 | OK     |
| 06/08/2021 3:00:48 PM |                      | 3193847871 | Cover+1 | OK     |
| 06/08/2021 2:40:07 PM |                      | 3193847871 | Cover+1 | OK     |
| 06/08/2021 1:37:51 PM |                      | 3193847871 | Cover+1 | OK     |

## Sending a fax

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

1. Click **New**.
2. On the **New Fax** page, enter the information for the fax. Usually you must enter at least the recipient's name and a fax number or email address.

You enter all information for sending a fax on the **New Fax** page.

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

## Entering the recipient

Under **To**, enter the recipient 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.

# New Fax - TESTUSER [100]

21 lines of 70 characters

Attachments

... or drop files here.

**Cover Sheet** ^

Include cover sheet

**Comment** v

**From** v

**Conversion** v

**Sending** v

^

## To enter a fax recipient

1. In the **Name** box, enter the name of the recipient.
2. In the **Destination** box, enter the fax number. You can enter the number with or without hyphens, parentheses, or spaces. The format for a local fax is [3191234567@fax.uiowa.edu](mailto:3191234567@fax.uiowa.edu) and long distance is [3191234567111111@fax.uiowa.edu](mailto:3191234567111111@fax.uiowa.edu) 111111 is the Long Distance auth code used in this example.
3. As needed, click on the drop down arrow next to name and it will give you more options. Additionally, on the right hand side you can select the 'From' drop down and enter optional contact information for the recipient in the **Name**, **Fax Number**, **Voice number**, **Company Fax Number**, **Company Voice Number** boxes.
4. Once you have filled out the appropriate information, you can click on the **Send** button to send the fax.

## Adding a cover sheet

Your account permissions determine your cover sheet options.

1. On the right hand side of the New Fax window, there is a **Cover Sheet** section.
2. Select the **Include cover sheet** check box.
3. Select the cover sheet you want from the list. If there is a cover sheet you are looking for that isn't present, please contact the Help Desk and they will assist in getting an ESC ticket created for this issue.
4. The System Default cover sheet will be the UI Health Care fax cover sheet. To preview the cover sheet for System Default, click the drop down and choose UIHC-Default and then click **View**. Repeat this process for any other cover sheet available to you that you wish to review.
5. Cover sheet notes appear on the cover sheet of the fax. Under **Cover sheet notes**, type text that should appear on the cover sheet of the fax.

## Attaching files to the fax

You can attach files to the fax.

The screenshot shows the 'To' field with a dropdown menu set to 'Fax' and a 'Destination' field. Below these is the 'Name' field with a dropdown arrow. A 'Cover sheet notes' text area is present, with a note indicating '21 lines of 70 characters'. At the bottom, the 'Attachments' section contains two buttons: 'Add File' (highlighted with a red box) and 'Add Library Document', followed by the text '... or drop files here.'

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 there is a desire to place a file in the library on the fax server, please submit an ESC ticket for this and someone from the Fax Server team will reach out.

### To attach a file

1. Under **Attachments**, click **Add File**.
2. In the Windows Explorer dialog box, locate and select the file(s).
3. The file(s) appears in the list of attachments.

### To change the order of the attachments

In the list of attachments, select the attachment you want to move by clicking on the attachment and then click the up or down arrow to change the order.

When your fax is ready, click **Send** in the lower right-hand corner to transmit your fax. If necessary, fill in any missing information.

### Notification of successful or failed fax

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

1. 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. Under **User to notify**, enter a full or partial username or RightFax user ID, and select the user. 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.

### 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**.

### To forward or route to a RightFax 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 User** or **Route to User** box, search for users.
  - a. In the **Forward to this user** or **Route to this user** list, enter a full or partial username or RightFax user ID.
  - b. Select the user or multiple users. Repeat as needed for multiple recipients.
3. In the **Comment for fax history** box, enter any notes you want to add to the document history.
4. To send the fax, click **Ok**.

## 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 **Release**.

## Retrying a failed fax

A sent fax that encounters errors during transmission will be retried a specific number of times over a set interval of minutes. After the specified number of retries, the server will stop retrying the fax and trigger either a successful or failed fax status.

In the **Retry Settings** table below a **Busy** status will be tried 6 times at an interval of every 15 minutes up to a total of 90 minutes before the fax will be identified as failed. Unlike a fax number that has the status of **Human Answered** which will be attempted once and then the fax will be identified as failed.

Staff members responsible for addressing failed faxes should begin their follow-up to ensure a successful fax occurs.

| Retry Settings            |                                |                                 |
|---------------------------|--------------------------------|---------------------------------|
|                           | Count:                         | Interval (in minutes):          |
| Busy:                     | <input type="text" value="6"/> | <input type="text" value="15"/> |
| Human Answered:           | <input type="text" value="1"/> | <input type="text" value="1"/>  |
| Special Information Tone: | <input type="text" value="1"/> | <input type="text" value="15"/> |
| No Loop/Errors:           | <input type="text" value="4"/> | <input type="text" value="15"/> |
| Other:                    | <input type="text" value="4"/> | <input type="text" value="15"/> |
| SMS:                      | <input type="text" value="1"/> | <input type="text" value="1"/>  |

## To retry sending a failed fax

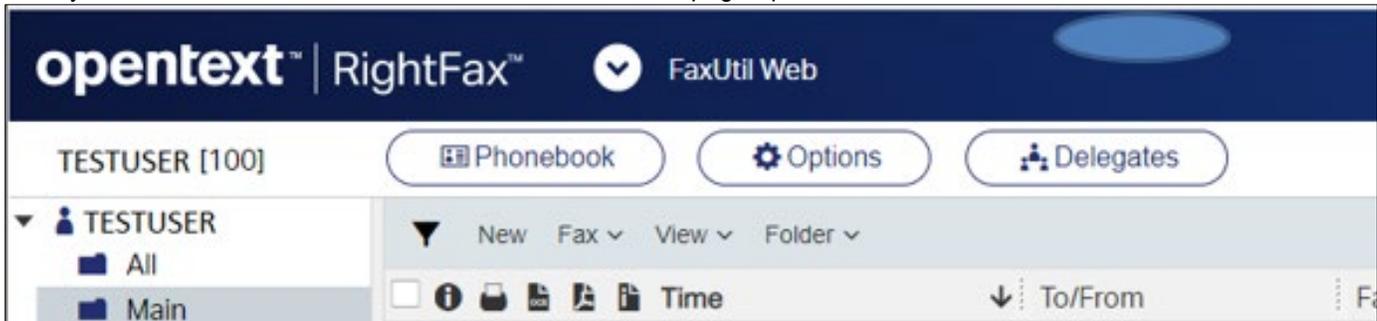
1. In your fax mailbox, in the fax list, select one or more faxes.
2. On the **Fax** menu, click **Status**, and then click **Update status**. If the fax was previously scheduled to retry, the fax server will retry immediately and not wait for the scheduled interval. If the fax was not previously scheduled to retry, the fax server will attempt to send the fax as if it were new.

## Creating and using phonebooks

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

### To create a personal RightFax 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.
4. Under **Options**, select any of the following check boxes:
  - **Published**. If selected, the entry will be available to other RightFax users. If your RightFax 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 **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.
6. Click **Ok**. The new entry appears in your phonebook list.

### Phonebook Entry

ID

**To**

Name

Destination type

Destination

Company

Address

City/State

**Options**

Published

Read only

Hidden on cover sheet CC 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.

**Phonebook Group**

ID

Available users and groups

Current group members: 0

Options

- Published
- Read only

Ok Cancel

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 the X to delete.

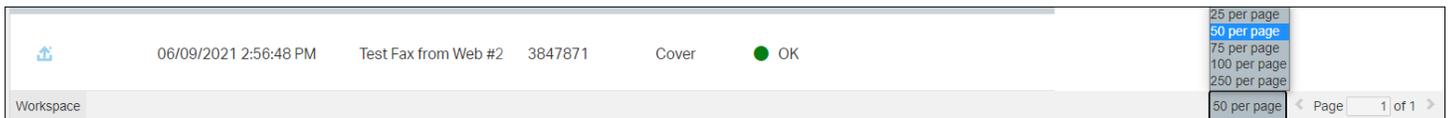
5. Select any of the following check boxes to specify who can view and edit this group phonebook entry.

- **Published**. If selected, the entry will be available to other RightFax users. If your RightFax 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.

## Customizing the appearance of the fax list

### To change how many faxes, appear per page



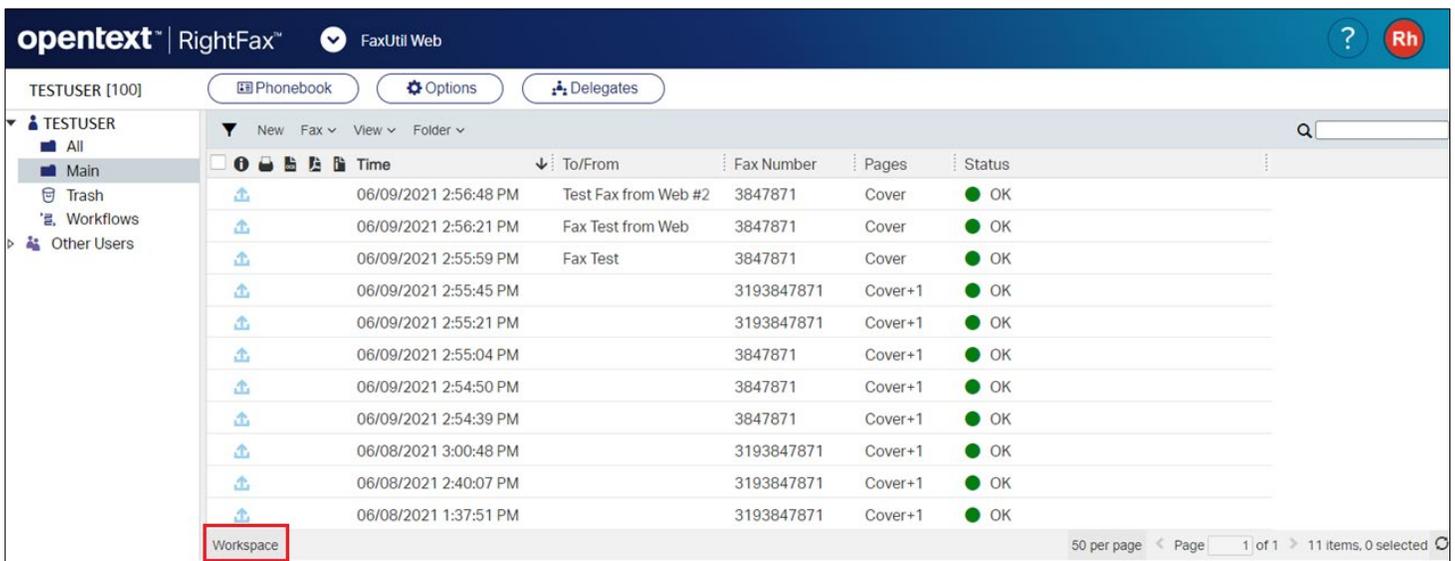
1. In the *n* per page list, select **25 per page**, **50 per page**, **75 per page**, **100 per page**, or **250 per page**.
2. To view the next or previous page of faxes, click the left or right arrow next to the **Page** box.

### 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**.



### Workspace

Show Columns ^

- Sent/Received flag
- Viewed flag
- Printed flag
- OCR flag
- PDF flag
- Document type
- Time
- To/from
- To name
- From name
- Fax number
- Pages
- Status
- Account
- Matter
- Unique ID
- Owner
- Comment
- Folder
- Handle
- Number of TX/RX records
- Binary file attachments bytes
- Folder ID
- Last history change
- Gateway fax
- Has TX/RX notes
- Requesting a PDF
- Data for newer versions
- Company
- Message from transport
- DID/DNIS
- Completion time
- Job ID
- ANI
- Completion event
- Availability
- Workflows

OK Cancel

## Automatic Aging

Automatic aging controls the length of time faxes is displayed in RightFax. Below are the settings in place.

Automatic Fax Aging

Settings apply to all user folders:

Deleted faxes:  (days)

Received Faxes (viewed or printed):  (days)

Received Faxes (unviewed and unprinted):  (days)

Sent Faxes (successful):  (days)

Sent Faxes (abandoned):  (days)

Outbound Incomplete Faxes:  (days)

Certified Delivery (SecureDocs Website):  (days)

Completed with Error (red status):  (days)

Permanent Problem (yellow status):  (days)