ADVANTAGE TECHNOLOGIES

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OpenText RightFax CE 22.2

Connector for Xerox MFPs

Administrator Guide

Edition

OpenText RightFax CE 22.2 Connector for Xerox MFPs

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Contents

Chapter 1: Configuring the Connector for Xerox MFPs **4**
RightFax support and requirements 4
Xerox MFP support 4
Configuring connector settings in RightFax 4
Managing MFP licenses 5
Configuring a Walkup account for guest users 5
Configuring Xerox MFPs to work with RightFax 6
User identification on the Xerox MFPs 6
Chapter 2: Sending a fax from Xerox MFPs **7**
Entering fax transmission information in the Xerox Fax tab 7
Sending a fax to a RightFax phonebook group 7

Chapter 1: Configuring the Connector for Xerox MFPs

With the Connector for Xerox MFPs, you can link Xerox multifunction printers (MFPs) on your network to a RightFax server. Users can scan documents on the MFP and transmit them as fax or email messages through the RightFax server.

RightFax monitors folders on your network called “repositories” for Xerox documents to process and transmit.

For basic fax functionality, you must install the Xerox Fax function on Xerox MFPs.

Users send faxes from the MFP by following this basic process:

1. The user enters fax transmission information on the Xerox MFP and scans the document.
2. The Xerox MFP saves the document as an image file and stores the file in the repository folder on the network.
3. RightFax picks up the image file from the repository, converts it to a file format appropriate for use by the RightFax server, and places it in the RightFax send queue for transmission.
4. The RightFax server transmits the file as a fax or email message to the destination specified by the user on the Xerox MFP.

RightFax support and requirements

The Connector for Xerox MFPs is installed as part of RightFax but must be purchased separately and activated through the Product Licensing Utility. Refer to the *RightFax Installation Guide* for specific information on server requirements and instructions for installing and activating optional modules.

The repository folder

MFPs that will submit fax jobs to the RightFax server must be configured to store scanned documents in the same network folder (the repository folder). See your documentation for instructions on setting this folder location.

The repository folder must be configured as an FTP site on an IIS server on your network. Verify that the FTP component is installed on the IIS server you want to use, and verify that Read/Write options are enabled for the repository folder.

Xerox MFP support

For a list of supported Xerox MFP devices, contact the manufacturer.

Configuring connector settings in RightFax

To configure RightFax to work with the Connector for Xerox MFPs, use RightFax Web Admin.

To configure the connector

1. In Web Admin, in the left pane, click **MFPs**. The list of MFPs appears in the right pane.
2. Click **Connectors**, and the **MFP connectors** page appears.

3. Select the **Xerox (one-way)** check box, and then click **Configure**. The **Xerox Connector for MFPs** dialog box opens.
4. Under **Repository Folders**, click **New**. The **New Repository Folder** dialog box opens.
5. Enter the path to the repository folder, and then click **OK**.

   Both the MFP and the RightFax Worker Host service must have sufficient user rights to read, write, modify, and delete files in this directory.

   > **Caution** If the MFP uses an FTP site as its repository that is remote from the RightFax server, change the RightFax Worker Host service to log in from an account with FTP access instead of the local system account. Ensure that the log on account used by the RightFax Worker Host service has administrative access to the computer where the FTP site is located. See the *RightFax Administrator Guide*.

6. Under **Defaults**, in the **User ID** box, enter or select the user ID of the account will be associated with faxes that are sent from the MFP by unidentified users. By default this is the Walkup user. To configure the Walkup user, see *Configuring a Walkup account for guest users* below.
7. In the **Default To Name** box, enter a name that will be used as the recipient when the sender does not specify one.
8. In the **Default From Name** box, enter a name that will be used as the sender when the sender does not specify one.
9. Select the **Print fax status notifications on the MFP** check box to print success or failure notification messages on the originating MFP after a fax is sent.

Managing MFP licenses

Enterprise Fax Manager and Web Admin display a list of licensed MFP devices. When the connector sends a fax from an MFP for the first time, it adds that MFP to the list and assigns a license to that device.

If you remove an MFP from your network, you can delete the MFP from the list to free up the license.

Configuring a Walkup account for guest users

Users with RightFax accounts can sign in at the MFP device using their RightFax user ID and password. Settings in the RightFax user accounts are used when sending documents from the MFP device.

RightFax includes a user ID for MFPs called Walkup. RightFax uses the Walkup account so guest users can create and send faxes from the MFP device if they do not have a RightFax user ID.

The Walkup user account determines the features that are available to these users when they send faxes from the MFP device. You can customize these features in the Walkup account in Enterprise Fax Manager or Web Admin, or you can select another user to designate as the default sending account.

Configure RightFax users and the Walkup user following these recommendations:

- You can configure the account to send email. Users with email addresses have the option to address their transmissions with either email or fax addresses.
- To provide email notifications about the success of sent faxes to users, configure email notifications in the user or user group profiles.
- Set up a default cover sheet for the account.

For more information, see the *RightFax Administrator Guide* or the *RightFax Web Admin Administrator Guide*.

Configuring Xerox MFPs to work with RightFax

Configure each Xerox MFP to save scanned documents into a repository folder on your network that is shared and accessible by both the MFP and the RightFax server.

Configure the device by using the web-based configuration tool provided by Xerox. See the Xerox documentation for information about how to set up repositories on your device.

To set up the repository

- Set the Fax Repository in the Fax Service to the repository path.



- Configure all of the Xerox MFPs that you want to integrate with RightFax to save documents in the same network folder.
- If the Xerox MFP uses FTP to communicate with the repository folder, configure the FTP site with sufficient write permissions to accept incoming documents from the Xerox MFP.

User identification on the Xerox MFPs

When a document is sent via the RightFax server, the server assigns it to a RightFax user. If the user is not identified at the MFP, RightFax will automatically assign the fax to the default RightFax user ID that you specified when the Xerox MFP Module was installed.

Identifying users by their network login

Many Xerox MFPs can be configured to require each user to enter their Windows network credentials to access the device. When configured for Windows authentication, these credentials can be used by the RightFax server to assign the outgoing fax to the appropriate RightFax user. For information on configuring your Xerox MFP to prompt users for their network credentials, refer to the documentation provided with your Xerox device.

Configure each Xerox MFP to pass credentials to the RightFax server. The method varies depending on the Xerox MFP, but generally you run a browser-based Xerox configuration application, select an option to configure general settings for network scanning, and select the options to have the user name and domain information included with outgoing jobs. For more information about setting up specific Xerox models, refer to the Xerox MFP documentation.

To identify users by their network login, configure each RightFax user to use NT user authentication. Then, outgoing faxes generated at the Xerox MFP will automatically be assigned to the appropriate RightFax user. To configure RightFax users for NT authentication, see the *RightFax Administrator Guide*.

Chapter 2: Sending a fax from Xerox MFPs

Faxes are initiated with the Xerox Fax function that is provided with Xerox MFPs.

Entering fax transmission information in the Xerox Fax tab

When the Xerox Fax function is installed, a **Fax** tab appears as an option on the Xerox MFP touch screen. Users enter the fax number using the following format:

[UserID]FaxNumber[*BillingCode1][*BillingCode2]

UserID is the sender's RightFax user ID.

FaxNumber is the destination fax number.

*BillingCode1 and *BillingCode2 are optional billing codes that can be entered in the dial string. Precede each billing code with an asterisk (*).

Sending a fax to a RightFax phonebook group

To send a document to multiple recipients at one time, users can send faxes to a RightFax phonebook group.

When sending to a phonebook group, the user will receive one notification for every recipient in the group. This may result in a large number of notifications for a single transmission event. The RightFax user or user group profile determines the notification methods that are used. See the *RightFax Administrator Guide*.

To send a fax to a RightFax phonebook group

- In the fax dial string, replace the destination fax number with the name of a RightFax phonebook group.

  The name of the phonebook group must be preceded by a pound (#) sign and it must exist in the specified RightFax user's phonebook or in the default user's phonebook if no RightFax user ID is specified.

  Example 1234#GROUP1, where1234 is the RightFax user ID, and #GROUP1 is a phonebook group in the user's phonebook.

> **Tip** If your MFP can accept only numeric input, give your phonebooks numeric names.