

3

Integrated Fax



Chapter Summary

Installing UC Client Manager - Overview	30
Requirements.....	30
Download and Install.....	30
Main Settings	33
Outbound Fax Services - Sending a Fax using Windows.....	35
Faxing From a Program.....	39
Fax Miscellany	45

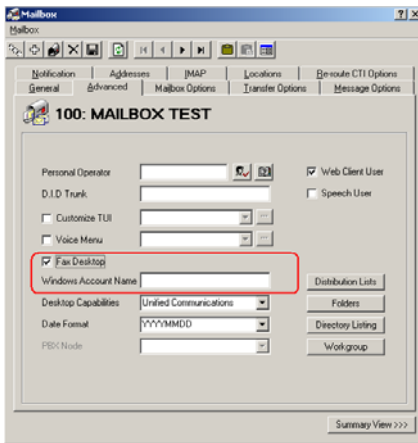
Integrated Fax

Installing Integrated Fax onto your PC eliminates the need of a separate Fax Server, greatly simplifying the sending of fax messages. By combining Integrated Fax with the TOL Voice Server, the User may more readily coordinate fax messaging into his/her work day. Also, refer to Appendices A and B, dealing with Installing UC Client Manager and Outbound Fax Services, respectively.

Preparing the User Mailbox

→ To prepare the User mailbox:

1. Navigate to **Admin > Mailbox > Advanced**. Select the **Fax Desktop** check box. This action enables the **Windows Account Name** text field immediately below. This field should be left **empty**.

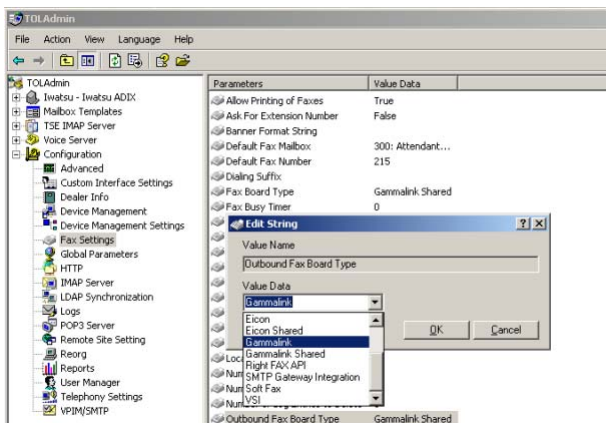


2. Click on the **Save** toolbar icon to save the mailbox.
3. Close the mailbox.

Admin Console - Fax Settings

NOTE: The following fax settings in Admin are fundamental points which must be addressed before Integrated Fax can be employed.

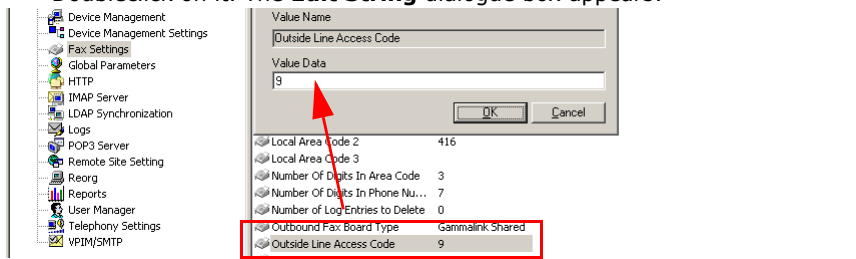
1. Login to the Admin Console. Navigate to **Configuration > Fax Settings**. Doubleclick on **Fax Settings**.
2. In the righthand pane, locate **Outbound Fax Board Type**. Doubleclick on it. The **Edit String** dialogue box appears:



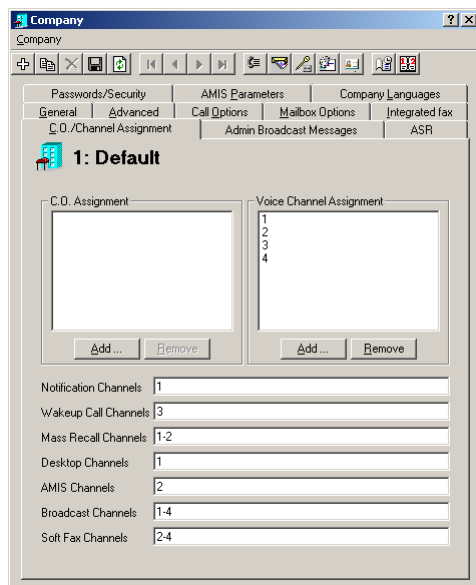
3. From the **Value Data** dropdown list, select either **Soft Fax** or **Gammalink**. Click **OK**.

3

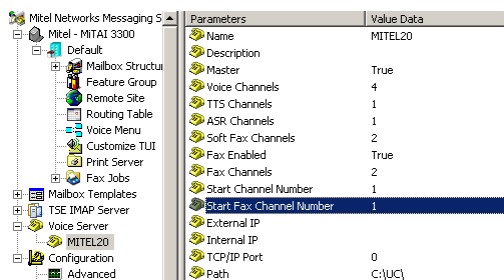
4. Still within **Configuration > Fax Settings**, locate **Outside Line Access Code** in the righthand pane. Doubleclick on it. The **Edit String** dialogue box appears:



5. In the **Value Data** text field, enter an integer value. This will serve as a prefix to fax numbers *outside* of the office.
6. Click **OK**. You may now close the Admin Console.
7. Right click on the company and choose properties. Click on CO Channel Assignment tab. Assign a range of ports for soft fax.



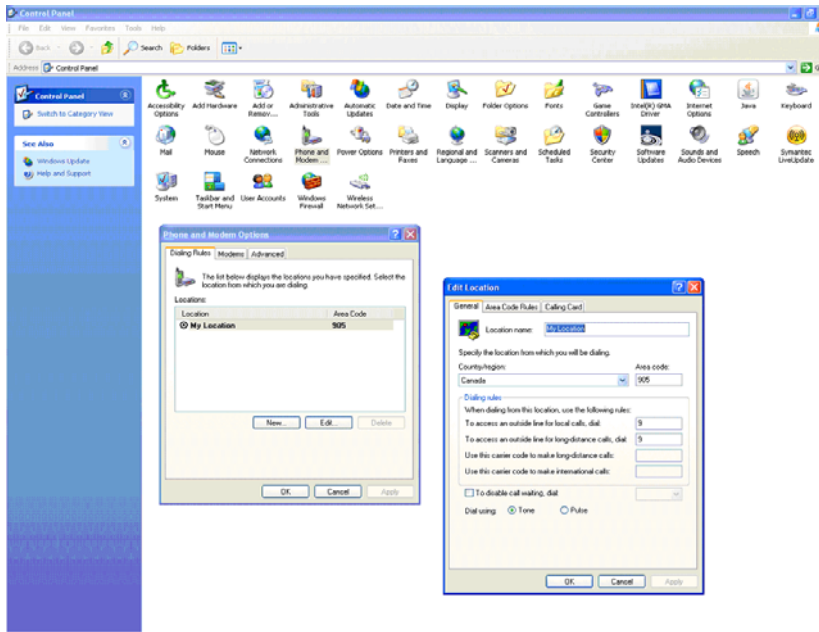
8. Go to the Voice Services section. Make sure that the following settings are correct.
 - ♦ **Soft Fax Channel Number:** The range of ports that are used for your soft fax.
 - ♦ **Example 1:** If you have 8 ports of voice and your 9th port is a soft fax port, you would enter **9** as the channel number.
 - ♦ **Example 2:** If you have 8 ports of voice and 2 soft fax ports, 9 and 10 being your dedicated soft fax ports, you would enter **9-10** as the channel number.
 - ♦ **Fax Enabled** must be set to **True**.
 - ♦ **Fax Channels:** number of fax channels you are licensed for
 - ♦ **Start Fax Channel Number: Must** be set to 1.



The next step is to install the **UC Client Manager** on client computers.

Phone and Modem Options

1. Go to the Server's **Control Panel** and launch the **Phone/Modem Options**.



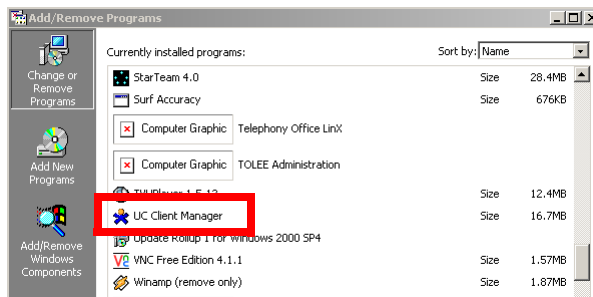
2. Enter your **Area Code**.
3. Edit **"My Location"**.
4. For the server, leave **"To access an outside line for local calls, dial"** blank.
5. For the server, leave **"To access an outside line for long distance calls, dial"** blank.
6. For the Client machine, put your **dialing out code** in the **"To access an outside line for local calls, dial"** field.
7. For the Client machine, put your **dialing out code** in the **"To access an outside line for long distance calls, dial"** field.
8. Click on **Area Code Rules** then **New**.
9. In the area code field, enter your **local area code to which the server resides in**.
10. If an area code is required to dial out, please place a check mark in the option **"Include the area code"**.
11. If you will be dialing long distance numbers, please place a check mark in the option **"Dial 1"**.

Installing Windows Fax Services (*Client Machine Only*)

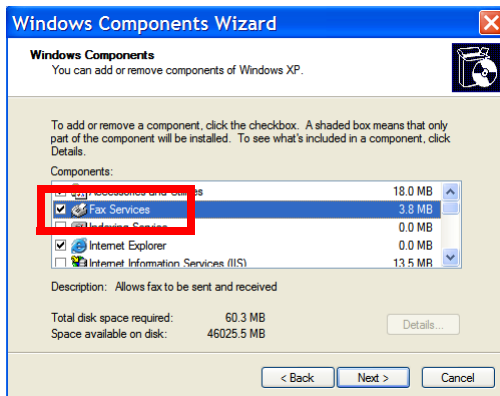
→ **To install Windows Fax Services:**

CAUTION: If UC Client Manager is currently installed on the target PC, it must now be uninstalled. Follow the steps outlined below. Otherwise, proceed directly to Step 3.

1. Navigate to **Start > Settings > Control Panel > Add/Remove Programs**. Doubleclick on the icon. The following screen appears:



2. Highlight **UC Client Manager** and click on the **Change/Remove** button. Follow the instructions. Restart the machine when completed.
3. Once more navigate to **Start > Settings > Control Panel > Add/Remove Programs**. From that point, doubleclick on **Add/Remove Windows Components**. The Windows Components Wizard screen appears:



4. Select the **Fax Services** checkbox. Click **Next**.
5. The Insert Disk dialogue box appears. Insert the Windows XP or Windows 2000 SP4 disk and complete the fax services installation.

Installing UC Client Manager - Overview

UC Client Manager allows you to access in part or in full the following functionality, depending on your User type:

- ◆ LanTalk instant messaging
- ◆ Caller ID screen popups
- ◆ Locations
- ◆ Change passwords for user login
- ◆ Call control on incoming calls
- ◆ Desktop dialing
- ◆ Text messaging
- ◆ Directory
- ◆ Record conversation

Requirements

Minimum

Hardware/Software Requirements	
CPU	CPU Intel Celeron 600mhz 128mb RAM
Operating System	WIndows 2000 SP4
Browser	Netscape Navigator 6.2+ Internet Explorer 6.0+

Recommended

Hardware/Software Requirements	
CPU	Intel Pentium III 600mhz 256mb RAM
Operating System	Windows NT SP6 Windows 2003 Windows XP SP1
Browser	Netscape Navigator 6.2+ Internet Explorer 6.0+

Download and Install

Downloading UC Client Manager

Before you can install UC Client Manager, you must download the software from the Web Client login page.

→ To download UC Client Manager:

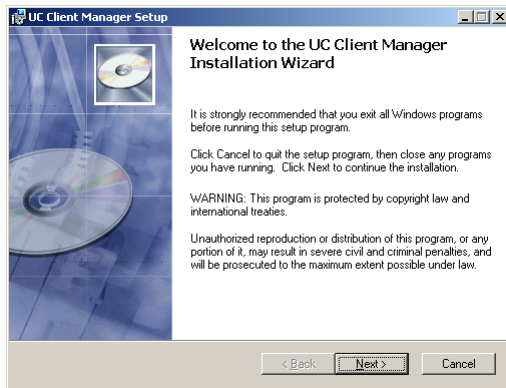
1. Close all running applications and open your browser.
2. Enter the UC server IP address in the **Address** field followed by **/UC**, then click **Go**.
3. Select **Web Client** on the splash page. The Web Client login page appears.
4. Click on **3 | UCClient Manager**. The File Download dialog box appears.
5. Click **Save**. The Save As dialog box appears.
6. Select a location for the download and click **Save**.

Installing UC Client Manager

Once you have downloaded the Client Manager software, you must install it onto your PC.

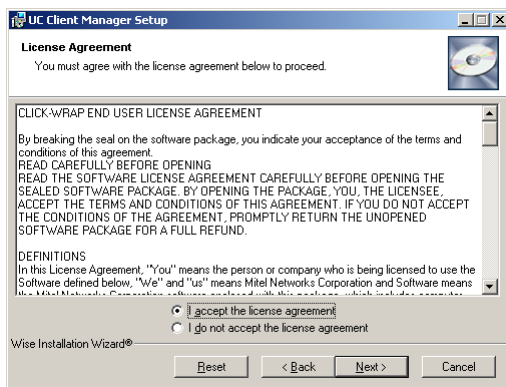
→ To install UC Client Manager:

1. Doubleclick on **UCClientManager.msi** (the installation file you downloaded). The Welcome screen appears:

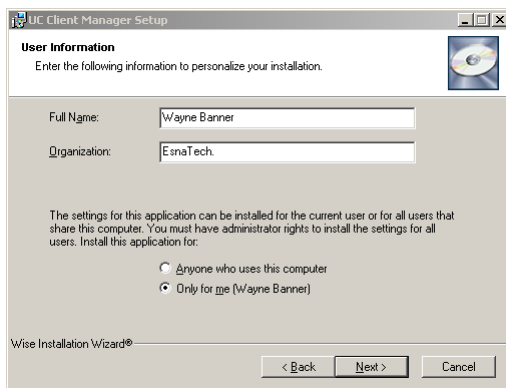


- NOTE:** The system will prompt you to close Microsoft Outlook or Lotus Notes if either are in use.

2. Click **Next**. The License Agreement appears:



3. Select the **I accept the license agreement** radio button, then click **Next**. The User Information screen appears:



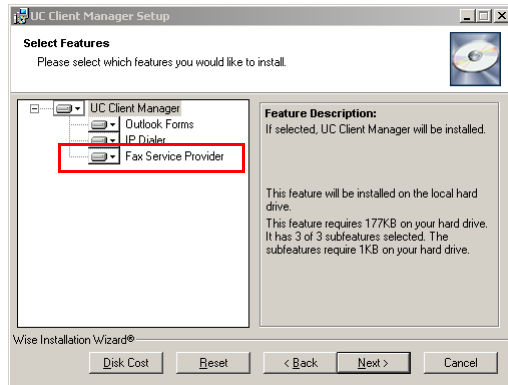
4. Provide the following information:

- ◆ In the **Full Name** field, enter the user's full name.
- ◆ In the **Organization** field, enter the name of your organization.
- ◆ Select the **Anyone who uses this computer** radio button to install the application for all users who share the PC.

OR

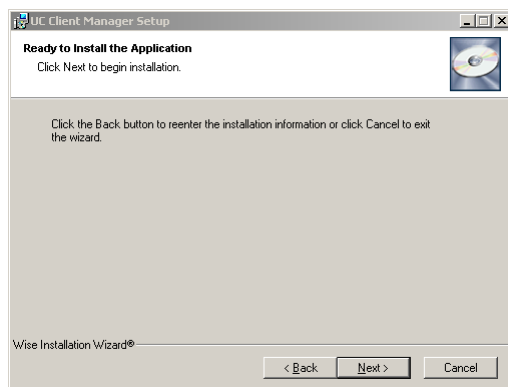
Select the **Only for me** radio button to install the application for the current user only.

- Click **Next**. The Destination Folder screen appears.
- Click **Next**. Select the **Client Manager**. Make sure that the **Fax Service Provider** is selected. You may also select **IP Dialer** and **Outlook Forms** checkboxes depending on your email client.

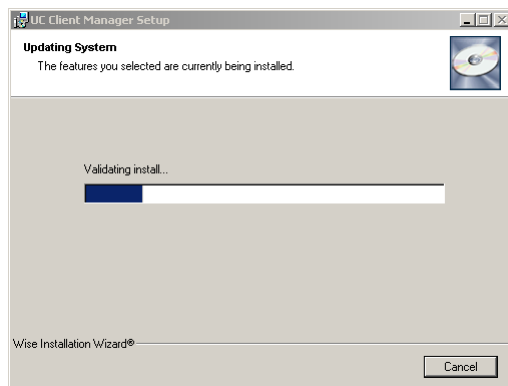


CAUTION: If **Fax Services Provider** is not an option it means that the **Fax Services** are **not** installed. You will have to cancel the UC Client installation then proceed to **Installing Windows Fax Services (Client Machine Only)** on page 7 before continuing with the UC Client installation.

- Click **Next**. The Ready to Install the Application screen appears:

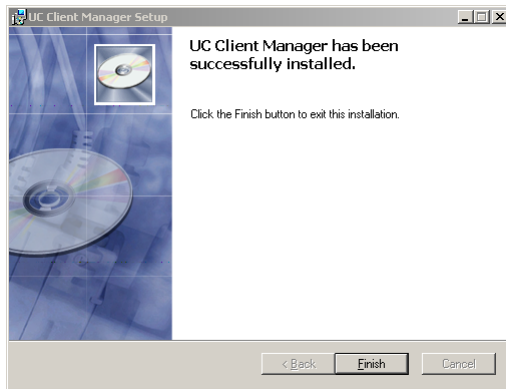


- Click **Next**. The Updating System screen appears:



NOTE: If you had earlier selected to install IP Dialer (see Step 6 on the previous page) screens to install the relevant hardware will now appear. Simply click in the affirmative.


9. When the installation is complete, the following screen appears:



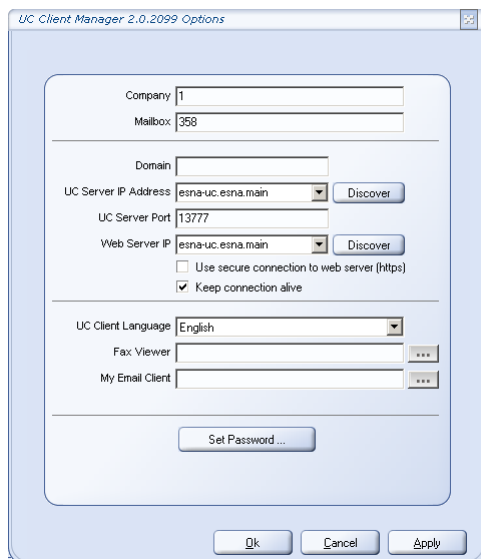
10. Click **Finish**. In order to log in successfully, you must now configure your main settings. Proceed to **Main Settings on page 33** for instructions.

Main Settings

Specifying Your Main settings

There should now be a Link (UC Client Manager) shortcut icon on your desktop. Doubleclick on it. A Link icon will appear in your system tray (bottom righthand corner of the desktop) . Rightclick on it and select **Options**. The Main screen appears:

→ **To specify your Main settings:**

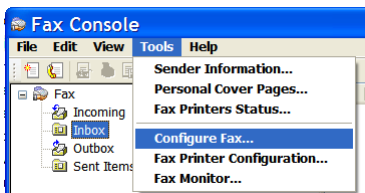


- Provide the following information, where necessary:
 - In the **Company** field, enter the company number or name that your account is associated with on the UC.
 - NOTE:** For more information on company IDs, ask your system administrator.
 - In the **Mailbox** field, enter your mailbox number for voice mail.
 - In the **Domain** field, enter the domain where the TOL Server can be found (required only if working in a separate domain from the TOL Server).
 - In the **UC Server IP Address** field, enter the UC Server IP address so the system can authenticate you using TCP/IP.

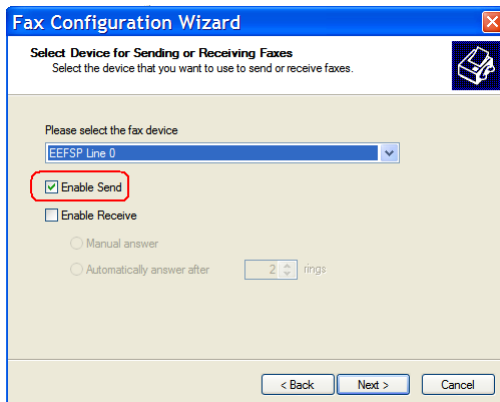
- ♦ In the **UC Server Port** field, enter the UMST server port number.
 - ♦ In the **Web Server IP** field, enter the IP address of the web server.
 - ♦ Select the **Use secure connection to web server (https)** checkbox if you want the system to set up a secure connection to your web server.
 - ♦ Select the **Keep connection alive** checkbox to ensure your connection is always maintained.
 - ♦ From the **UC Client Language** dropdown list, select the language that is to be used.
 - ♦ In the **Fax Viewer** field, click the **ellipsis (...)** button to view the specific fax viewer application you already have loaded on your PC. Otherwise, leave this field blank and the system will employ the Windows default.
 - ♦ In the **My Email Client** field, click the **ellipsis (...)** button to view the specific email client you already have loaded on your PC. Otherwise, leave this field blank for the system to use the Windows default.
 - ♦ Select the **LanTalk Popup** checkbox if you want the Lan Talk screen to pop up when someone initiates a Lan Talk conversation with you.
 - ♦ Click on the **Change Password** button if you want to change the existing password.
2. Click **Apply**, then **OK** to complete the configuration OR click on another tab to continue. *The installation and initial setup of UC Client Manager is complete. Refer to Chapter 3 of the Client Applications Guide for full instructions on configuring your Client Manager.*

Once you have finished configuring your **UC Client Manager** you must also configure the **Microsoft Fax Services** in order to integrate it with the **UC Client Manager**.

1. Click **Start > All Programs > Accessories > Communications > Fax > Fax Console**. From the Fax Console click on **Tools > Configure Fax**.



2. Enter your personal information in the wizard. Click Next until you get to the following screen:



3. From the drop down menu select **EEFSP Line 0**. Afterwards check the **Enable Send** check box.

CAUTION: Before you proceed you must check the other options under the drop down menu and make sure that **Enable Send** is **not** checked for the other items.

4. Click Next until you finish the wizard.

Outbound Fax Services - Sending a Fax using Windows

- Note:** Ensure that the workstations can **telnet into the voice server** (i.e.: from cmd - telnet 192.168.1.1 21).

Windows XP

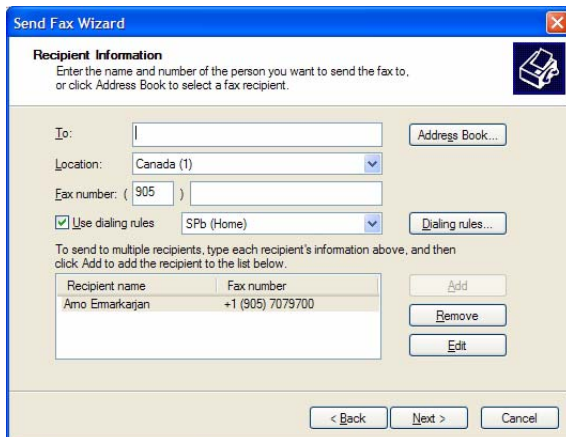
You can send a fax via the Fax Wizard to any number of recipients.

→ To send a fax (Windows XP):

1. Select **Start > All Programs > Accessories > Communications > Fax**, then click **Send a Fax**. The **Send Fax Wizard** screen appears:



2. Click **Next**. The **Recipient Information** screen appears:



3. Specify the following:

- ♦ In the **To** field, specify the name of the intended recipient.

HINT: Click on the **Address Book** button to select the recipient from your personal address book.

- ♦ From the **Location** dropdown list, select the location (country) of the intended recipient.
- ♦ In the **Fax number** fields, specify the fax area code and number for the intended recipient.
- ♦ Select the **Use dialing rules** checkbox if you want specific dialing rules to apply. Select the dialing rules from the accompanying dropdown list.

NOTE: To create a new set of dialing rules, click on the **Dialing rules** button.

4. Click on the **Add** button to add the recipient whose information you have just specified.

NOTE: You can add as many recipients as you wish.

5. Click **Next** when you have added all desired recipients. The **Preparing the Cover Page** screen appears:

6. From the **Cover page template** dropdown list, select the cover page template you want to use.

7. In the **Subject line** field, enter subject text for the fax cover page.

8. In the **Note** box, enter message text for the fax cover page.

9. Click **Next**. The **Schedule** screen appears:

10. Select one of the **When do you want to send this fax?** radio buttons:

- ◆ **Now** - send the fax immediately
- ◆ **When discount rates apply** - send the fax the next time discount phone rates apply
- ◆ **Specific time in the next 24 hours** - send the fax at a specific time in the next 24 hours. If you select this radio button, you must then specify a time of day from the accompanying spin-box

11. Select one of the following **What is the fax priority?** radio buttons:

- ◆ **High** - high priority for sending fax
- ◆ **Normal** - normal priority for sending fax
- ◆ **Low** - low priority for sending fax

12. Click **Next**. The following screen appears:



13. If you want to preview your fax, click on the **Preview Fax** button. Otherwise, click **Finish**. To confirm that your fax was sent successfully, check the **Sent Items** folder of your Fax Console application.

Windows 2000

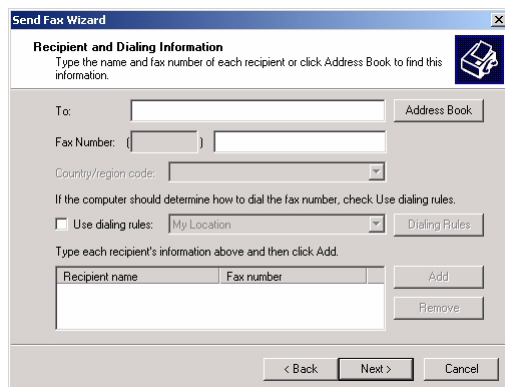
You can send a fax via the Send Fax Wizard to any number of recipients.

→ **To send a fax (Windows 2000):**

1. Select **Start > All Programs > Accessories > Communications > Fax**, then click **Send a Fax**. The **Send Fax Wizard** screen appears:



2. Click **Next**. The **Recipient Information** screen appears:



3. Specify the following:

- ◆ In the **To** field, specify the name of the intended recipient.

- HINT:** Click on the **Address Book** button to select the recipient from your personal address book.
- ♦ In the **Fax number** fields, specify the fax area code and number for the intended recipient.
 - ♦ From the **Country/Region code** dropdown list, select the country/area code of the intended recipient.
 - ♦ Select the **Use dialing rules** checkbox if you want specific dialing rules to apply. Select the dialing rules from the accompanying dropdown list.
- NOTE:** To create a new set of dialing rules, click on the **Dialing rules** button.
4. Click on the **Add** button to add the recipient whose information you have just specified.
- NOTE:** You can add as many recipients as you wish.
5. Click **Next** when you have added all desired recipients. The **Preparing the Cover Page** screen appears:

6. From the **Cover page template** dropdown list, select the cover page template you want to use.
7. In the **Subject line** field, enter subject text for the fax cover page.
8. In the **Note** box, enter message text for the fax cover page.
9. Click **Next**. The **Scheduling Transmission** screen appears:

10. Select one of the **When do you want to send this fax?** radio buttons:
- ♦ **Now** - send the fax ASAP
 - ♦ **When discount rates apply** - send the fax the next time discount phone rates apply
 - ♦ **Specific time in the next 24 hours** - send the fax at a specific time in the next 24 hours. If you select this radio button, you must then specify a time of day from the accompanying spin-box
 - ♦ In the **Billing code** field, specify a billing code (if applicable)

11. Click **Next**. The following screen appears:



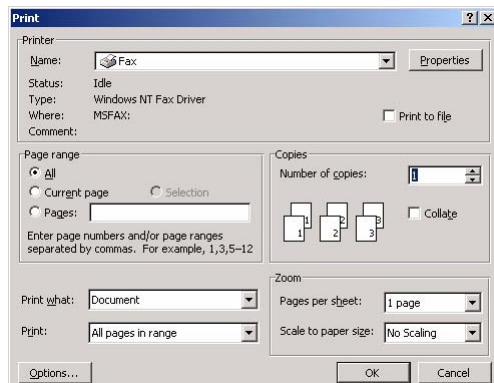
12. Click **Finish**. To confirm that your fax was sent successfully, check the **Sent Items** folder of your Fax Console application.

Faxing From a Program

You can send a fax from many programs, including MS Word, Outlook, Excel and Notepad.

→ To fax a document from a program:

1. Open your document in the program it was created in.
2. Select **File > Print**. The **Print** dialog box appears:



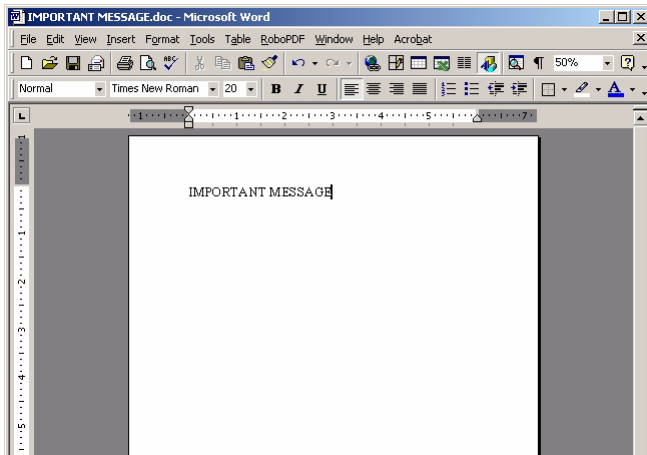
3. Select the fax printer, then click **OK**. The Send Fax Wizard appears. See **Windows XP on page 35** or **Windows 2000 on page 37** for fax wizard instructions.

Faxing From MS Word

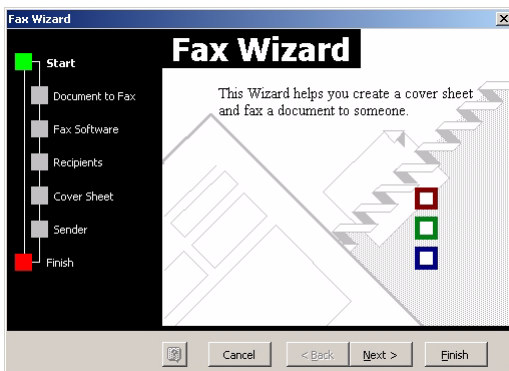
When using Microsoft Word, you have a second method by which may send a fax.

→ **To fax a document from Word:**

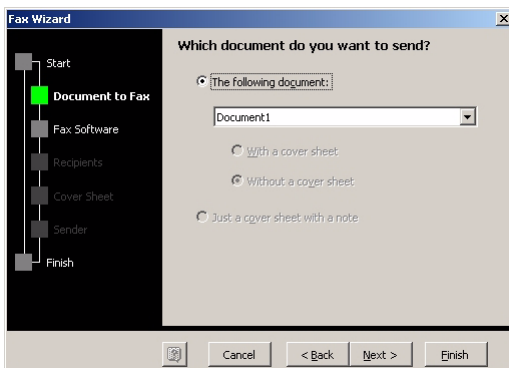
1. Open the .doc file you want to fax in Word.



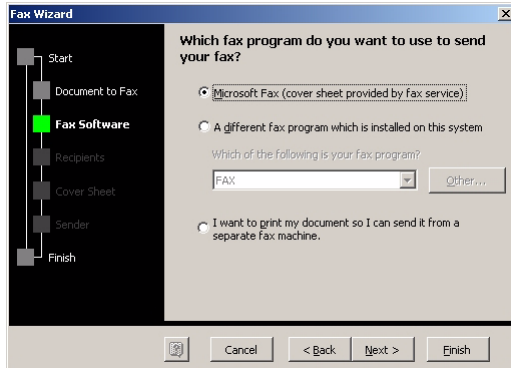
2. Select **File > Send To** and click on **Fax Recipient**. The following screen appears:



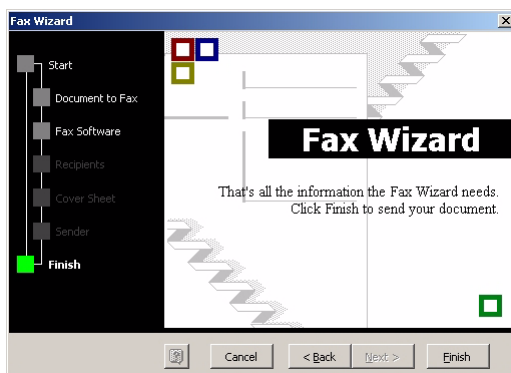
3. Click **Next**. The following screen appears:



- Make sure the document you want to fax is selected in the dropdown list, then click **Next**. The following screen appears:



- Make sure the **Microsoft Fax** radio button is selected, then click **Next**. The following screen appears:



- Click **Finish**. The Send Fax Wizard appears. See **Windows XP on page 35** or **Windows 2000 on page 37** for fax wizard instructions.

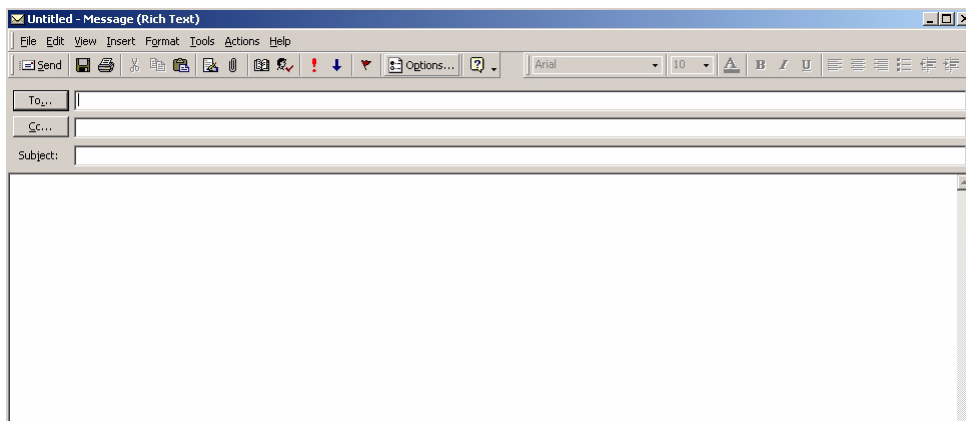
Faxing from MS Outlook

→ To fax from Outlook:

- Open Outlook.
- Select **File > New > Mail Message**.

OR

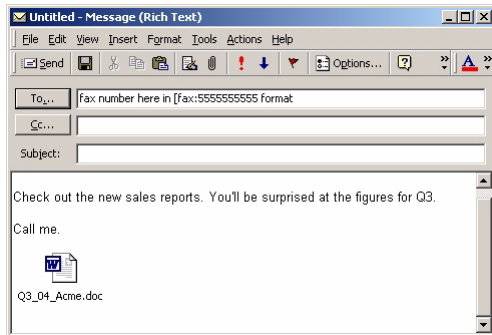
Click the **New** button.



- In the **To...** field, type **[fax:** followed by the number of the fax machine. End the address with another bracket. For example, **[fax:5555555555]**.

✓ **NOTE:** Fill in the **To**, **From** and **Subject** fields and the message body of the message as appropriate. All content will appear on the cover page of the fax.

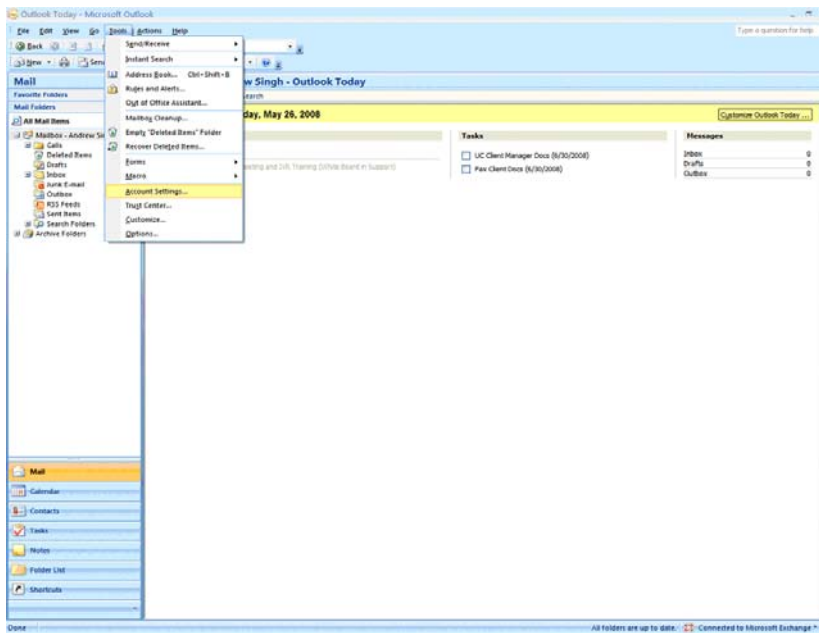
4. Select **Insert > File** or click the **Insert File** button. From the **Insert File** dialog box, browse for, highlight and click **Insert** for the file you want to fax.



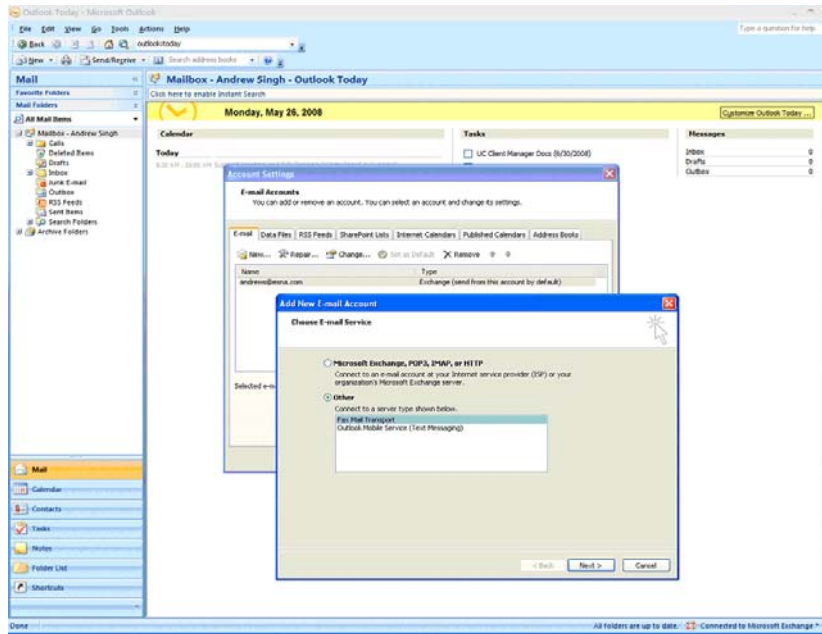
5. Select **File > Send** or click on the **Send** button.

Faxing from MS Outlook 2007

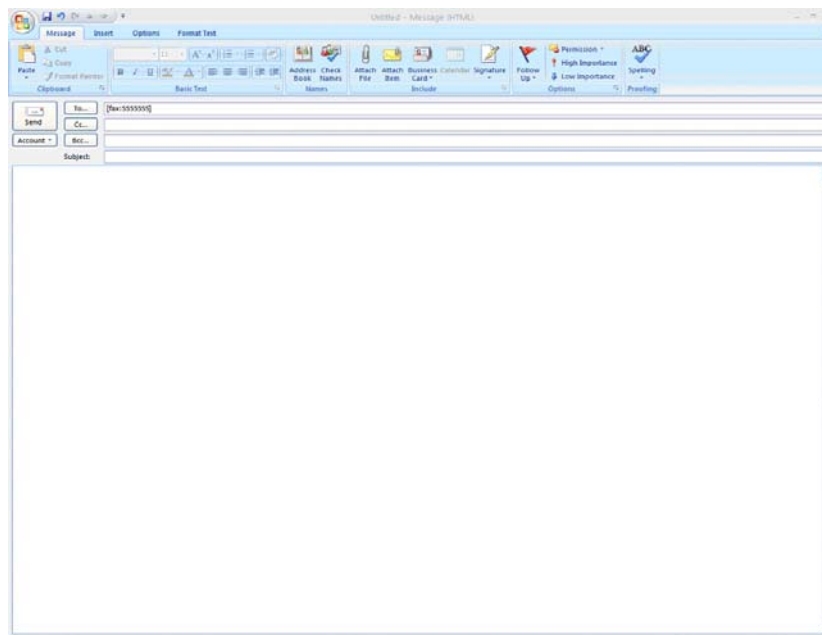
1. Click on **Tools** then **Account Settings**.



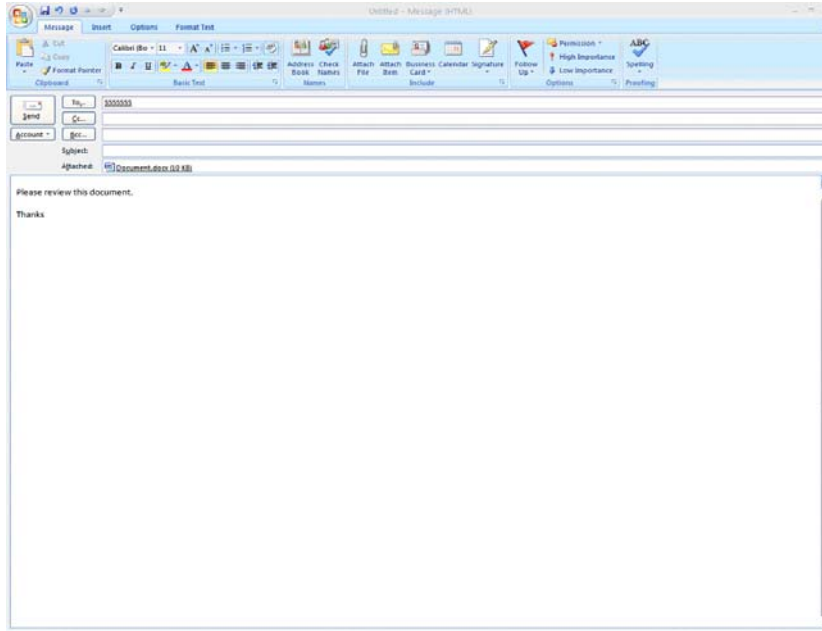
2. Click on the **Email** tab then click **New**.



3. Add the **Fax Mail Transport** account as shown above.
4. Close the setting windows the and restart Outlook 2007 so that the changes will go into effect.
5. After you start Outlook 2007 again,
6. Select **File > New > Mail Message OR** click the **New** button.



- In the **To...** field, type **[fax:** followed by the number of the fax machine. End the address with another bracket. For example, **[fax:5555555555]**.



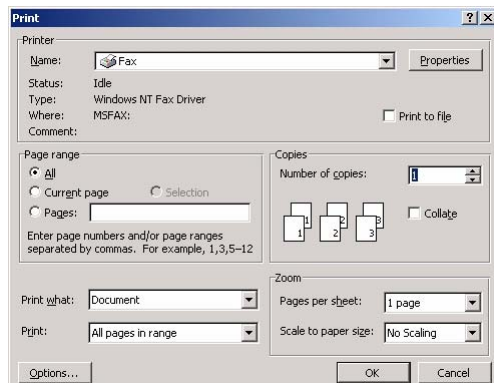
- Once the address resolves select **Insert > File** or click the **Insert File** button. From the **Insert File** dialog box, browse for, highlight and click **Insert** for the file you want to fax.
- Select **File > Send** or click on the **Send** button.

Faxing a Scanned Document

You can fax a scanned document from your default image viewing application.

→ To fax a document that you have scanned:

- Scan the document using your scanner software.
- With the scanned file open select **File > Print**. The **Print** dialog box appears:

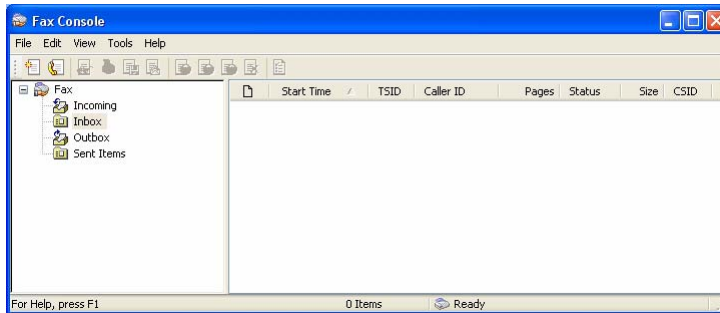


- Select the fax printer, then click **OK**. The Send Fax Wizard appears.
- See **Windows XP on page 35** or **Windows 2000 on page 37** for fax wizard instructions.

Fax Miscellany

Viewing the Status of a Fax

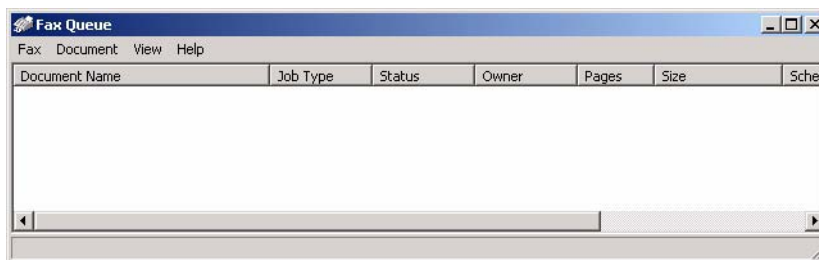
Windows XP



→ **To view the status of a fax:**

1. Select **Start > All Programs > Accessories > Communications > Fax > Fax Console**.
2. In the lefthand pane, click to expand **Fax** (if not already expanded). The following list describes the folders under Fax:
 - ♦ The **Incoming** folder contains faxes that are currently being received.
 - ♦ The **Inbox** folder contains faxes that have been received.
 - ♦ The **Outbox** folder contains faxes that are scheduled to be sent.
 - ♦ The **Sent Items** folder contains faxes that have been successfully sent.
3. In the lefthand pane, highlight a folder.
4. In the righthand pane rightclick on the fax you want and select **Properties**.
5. On the General tab, check the status of the fax under 'Status'.

Windows 2000



→ **To view the status of a fax:**

1. Select **Start > Programs > Accessories > Communications > Fax > Fax Queue**. The Fax Queue dialog box appears, in which you can check on the status of the fax.

Receiving and Viewing a Fax

Windows XP

→ **To receive and view a fax:**

1. Select **Start > All Programs > Accessories > Communications > Fax > Fax Console**. The Fax Console detects incoming faxes and stores them in your inbox.
2. To view a fax click **Inbox**, then doubleclick on the fax you want to view.

Windows 2000

→ **To receive and view a fax:**

1. Select **Start > Programs > Accessories > Communications > Fax**, then click **My Faxes**. The My Faxes folder appears.
2. To view a fax doubleclick on the **Received Faxes** folder, then doubleclick on the fax you want to view.

Cancelling a Fax Job

You can cancel any fax you have set up to be sent at a future time.

Windows XP

→ **To cancel a "to-be-sent" fax job:**

1. If Fax is not open, select **Start > All Programs > Accessories > Communications > Fax > Fax Console**. The Fax Console appears.
2. To cancel a fax click **Outbox**, then rightclick on the fax you want to cancel.
3. Click **Delete** to cancel the fax.
4. Click **Yes**.

Windows 2000

→ **To cancel a "to-be-sent" fax job:**

1. If Fax is not open, select **Start > Programs > Accessories > Communications > Fax**, then click **Fax Queue**. The Fax Queue appears.
2. Rightclick on the fax job you want to cancel, and select **Cancel**.

Automatically Send Retry (Windows XP)

You can set up Fax so that it continues trying to send your fax if the receiving fax machine is busy.

NOTE: Fax is automatically set up to retry three (3) times at 10-minute intervals.

→ **To automatically retry sending a fax that failed to connect:**

1. Select **Start > Control Panel**. The Control Panel appears.
2. If your Control Panel is in **Category** View, click **Printers** and **Other Hardware**. Click **View installed printers or fax printers**. The **Printers and Faxes** screen appears.

OR

If your Control Panel is in **Classic** View, doubleclick the **Printers and Faxes** icon. The **Printers and Faxes** screen appears.

3. Rightclick **Fax** and select **Properties**. The Fax Properties dialog box opens.
4. Click the **Devices** tab, then **Properties**. The Modem dialog box opens.
5. Specify the number of retries and the amount of time between retries.
6. Click **OK**.

Automatically Cancelling a Fax (Windows XP)

If your PC tried to send a fax and failed to connect to a fax machine, you can automatically cancel a failed fax.

→ **To automatically cancel a failed fax:**

1. Select **Start > Control Panel**. The Control Panel appears.
2. If your Control Panel is in **Category** View, click **Printers** and **Other Hardware**. Click **View installed printers or fax printers**. The **Printers and Faxes** screen appears.

OR

If your Control Panel is in **Classic** View, doubleclick the **Printers and Faxes** icon. The **Printers and Faxes** screen appears.

3. Rightclick **Fax** and select **Properties**. The Fax Properties dialog box opens.
4. Click the **Devices** tab, then click **Properties**. The Modem dialog box opens.
5. Click the **Cleanup** tab.
6. Click to check **Automatically delete failed faxes after** and specify the number of days.
7. Click **OK**.