Fax Server PC software manual
V4.0
VC1576

Fax Server Setup

FSEmail

SendFax

FSFile

Fax Server Access System

Manual Fax Server Software © 2011-2014 Vidicode®

Contents

1   Introduction

This manual describes the PC software applications that are distributed with the Vidicode Fax Servers (Blue Line product range). The applications are meant for the individual users in the computer network with the Fax Server.

Fax Servers are stand-alone network fax machines. There are several types of Fax Servers varying in number of fax channels (1 to 16) and for different telephone line protocols (analogue, ISDN S0, ISDN E1 and T1). All models cooperate with the PC software as described in this manual.

A Fax Server can be shared with other users just as a network printer. All users on the network can use it to send a fax from their PC and to receive faxes.

The Fax Server distributes received faxes via E-mail. The connection between the Fax Server and your mail server is explained in the hardware manual of the Fax Server and is partly outside the scope of this manual.

The applications described in this manual are:

- **Fax Server Setup** is a tool to create ftp accounts for users of the fax server

- **SendFax** used to send faxes from your PC.

- **FSEmail** used to send faxes from your PC using e-mail

- **FSFile** can send files from your PC as faxes.

- **Fax Server Access System** used to search the archive of all sent and received faxes on your PC

2   Fax Server Setup

2.1 Fax Server Setup Introduction

The Fax Server Setup application is a tool for the network manager to create ftp accounts for users of the Fax Servers.

The FTP user accounts are used to personalize the Fax Servers archive. The Fax Server will allow a user to view faxes that have been sent by specific users and to view faxes received on specific telephone extension numbers only.

The Fax Server Setup does not keep any records by itself. For every time the application is started a connection to the Fax Server is required to retrieve the user information. This information can then be edited and uploaded to the Fax Server.

It is possible to create a user account without an ftp account. Any user without an ftp account will only receive faxes received on his own extension in his email.

2.2 Software updates

Both Fax Server Setup application can be updated over the web.

- Choose **Help** in the main menu and select "**Check for update**"

A new dialogue opens where the current version is displayed.

- Click on the "**Check update**" button to check for updates.

The program will check on the Vidicode website for updates of the program. If there are updates they will be displayed.

- Click "**do update**" to execute the update.

Note: The file that is downloaded is a zipped file that is unpacked by the application itself. Update files are approximately 1 Mb in size.
Updates can not be executed while the program is performing other tasks.
An open internet connection is required for this operation.

2.3 Installation

Placing the CD-ROM in your computer gives you a choice of installation of Vidicode software. Choose to install the Fax Server Setup software. If the installation is not started automatically, start the FSSetup.exe file in the FSAS folder on the CD to start installation manually. Follow the instructions on the screen.

2.4 Setting up a Fax Server

When the program is started the following dialogue appears:
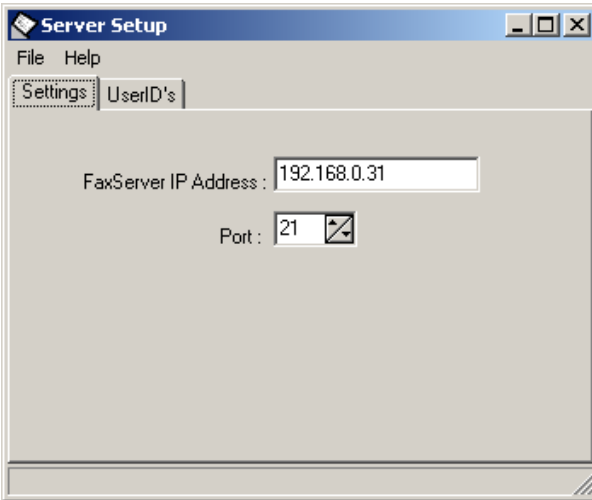
- Enter the Fax Server IP address.

The port setting on the Fax Server is default set to 21.

- Select the User ID's tab

- The Fax Server Setup will now come up with the following dialogue for FTP username and password:
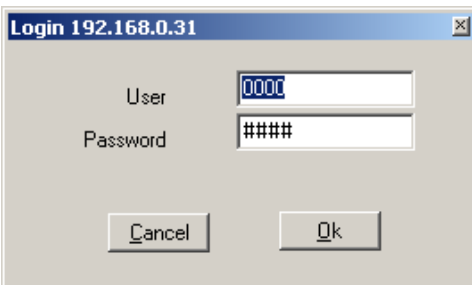
- Enter the administrator ftp username and password

- The Fax Server Setup will now make a connection to the fax server to retrieve user information.

- Now select the User ID's tab after the connection has terminated.

- The User list as on the Fax Server is now displayed. If there is no user list present on the Fax Server the dialogue will be blank.
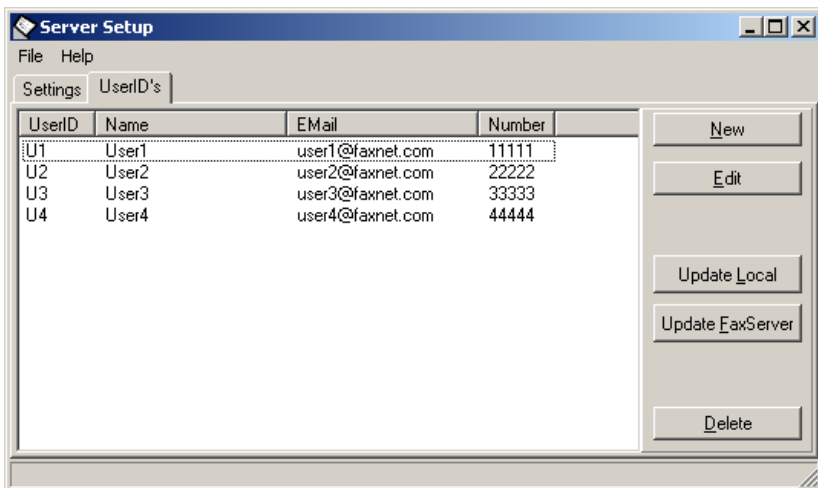
2.5 The user list

The user list displays the User ID, The username the email address and the number.
The User ID consists of two characters, the user ID is used throughout the Fax Server applications to identify a user.
The UserName of the user is used as a more intuitive name for the user.
The e-mail address is the e-mail address the received faxes of the user are sent to.
The number is the extension number which is used as a fax number of the user.

2.6 Create a new user

- Click **New** to create a new user.

The following dialogue appears:
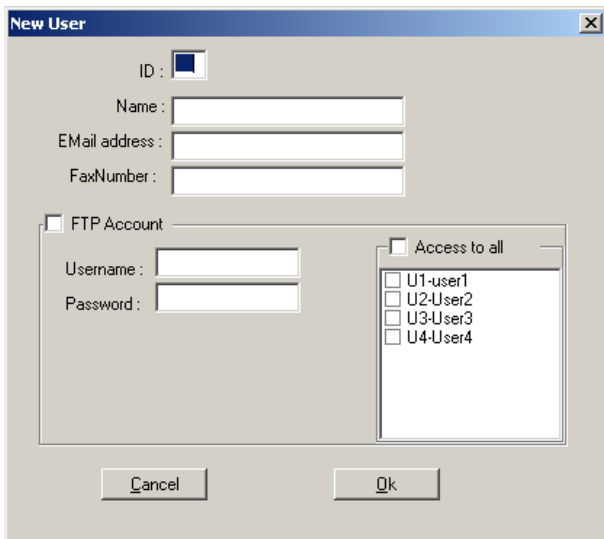
- Enter the user properties of the new user.

For every user there is an option to create an ftp account.
With the ftp account a user can setup a connection to the Fax Server with the Fax Server Access software to view his or her faxes on the Fax Server. Access to existing user accounts can be set for every user. Check the checkboxes of existing users in the list to enable access to their faxes.

- Click OK to finish.

2.7 Edit a user profile

A user profile is edited much the same way as creating a new user.

- Select a user in the list of users and click "**Edit**"

A new dialogue appears with the selected user properties. Now you can edit the user properties.

- Click **OK** to save the changes.

At this point the user profile has changed in the user list as displayed on your screen. To save the list on the Fax Server the list needs to be transferred to the Fax Server.

- Press "**Update Fax Server**" to transfer the user profiles to the Fax Server.

3 FSEmail

FSEmail v3 includes SendFax and FSFile!
FSEmail is computer software that provides the possibility to send faxes using e-mail. FSEmail regularly checks a specific e-mail account for new e-mail. New e-mails are converted automatically to a faxable format and then send to the Vidicode Fax Server. FSEmail reports by e-mail in case of a problem when converting to fax format. The Vidicode Fax Server sends and receives faxes, and also reports back by e-mail.
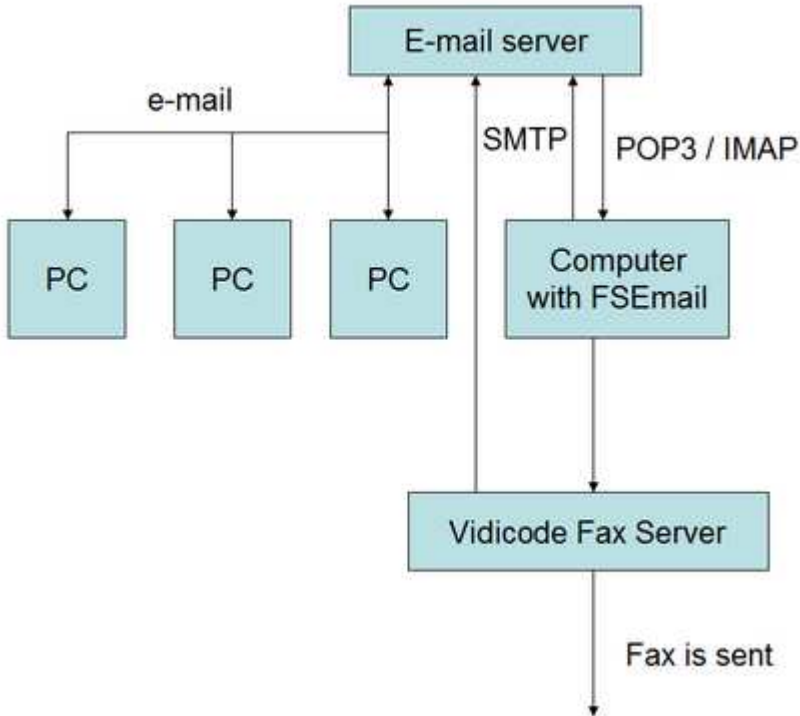
3.1 Installation

FSEmail can be installed on a Windows PC or a Windows Server. It operates as a Windows Service in the background.
During installation, you are asked to provide the IP address of the Fax Server, and the Windows user to be used to run the service. The FSEmail service must be run as a specific Windows user (not as the system account) to avoid problems like printers or network access not being available.

NOTE: FSEmail automatically installs the program **SendFax**. If you have SendFax already installed, please uninstall it first. This is unlike previous versions of FSEmail that required a separate installation of SendFax. Since version 3, SendFax is bundled with FSEmail. FSEmail also includes **FSFile** functionality, which was a separate program previously.

3.2 Additional programs to install

By default, FSEmail is able to handle only the following file types:
- text or HTML as e-mail content or as attachment
- image files (such as TIF, PNG, JPG)
- .rtf files

If you want that your users can fax file types in addition to the file types mentioned above, then you need to install readers (or full editors) for these file types on the computer where FSEmail is installed. For example:

- Install PDF reader to let your users fax PDF documents

- Install MS Word or MS Word Reader to let your users fax MS Word documents

FSEmail converts files to faxable format by printing to the virtual "Fax Server IP" printer. This printing needs to be done silently, without asking the user for confirmation or settings. For those file types for which FSEmail does not have included a default configuration, you need to specify how FSEmail can print them silently to the "Fax Server IP" printer (See File Type).

3.3 Setup a new e-mail account

FSEmail needs an e-mail account to check and monitor for new e-mails to convert to fax. It is strongly recommended to create a separate dedicated e-mail account on your e-mail server for this purpose. You might name this e-mail account, for example, faxing@mycompany.com. For this e-mail account, either POP3 or IMAP access must be available and enabled. FSEmail deletes handled e-mails from the e-mail account after processing.

3.4 Usage

When everything is configured, users can send faxes by email to the email account that is monitored by FSEmail.

The fax number is specified in the Subject of the e-mail. You can specify multiple fax numbers, by separating them by comma's. The fax number should not contain spaces or other special characters. For example:
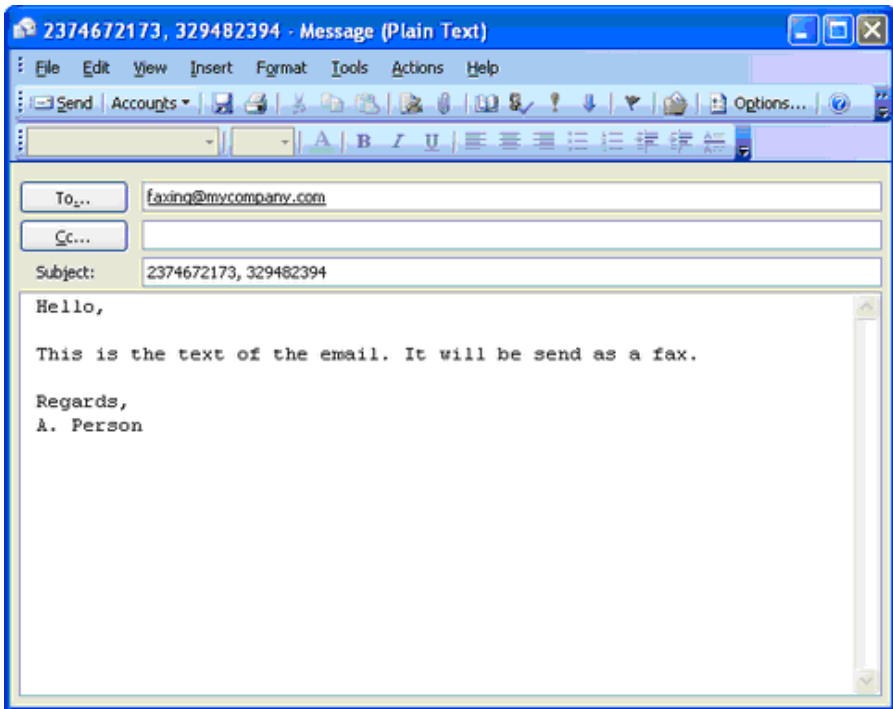
In the above case, the subject line was:

   2374672173, 329482394

So the fax will be send to number 2374672173, and to number 329482394.

When you have set a specific required word in the configuration, for example "faxbyemail", then the subject line would be:

   faxbyemail 2374672173, 329482394

The sender of the email normally gets a confirmation message from the Fax Server when the fax has been sent correctly.

After the fax number, the Subject line can contain additional parameters. Currently, the following parameters are supported:

preview: FSEmail will reply with an e-mail containing a preview of the fax, and nothing will be faxed actually. (But it is still required to specify a fax number) **test**: This is the same as the preview parameter.

If an unrecognized parameter is used, the e-mail will be rejected and not processed.

3.5 FSEmail Control Panel

Because FSEmail operates in the background as a service, to check settings and to monitor its operation, use the FSEmail Control Panel. A shortcut link to this program is installed by default in the Start menu.
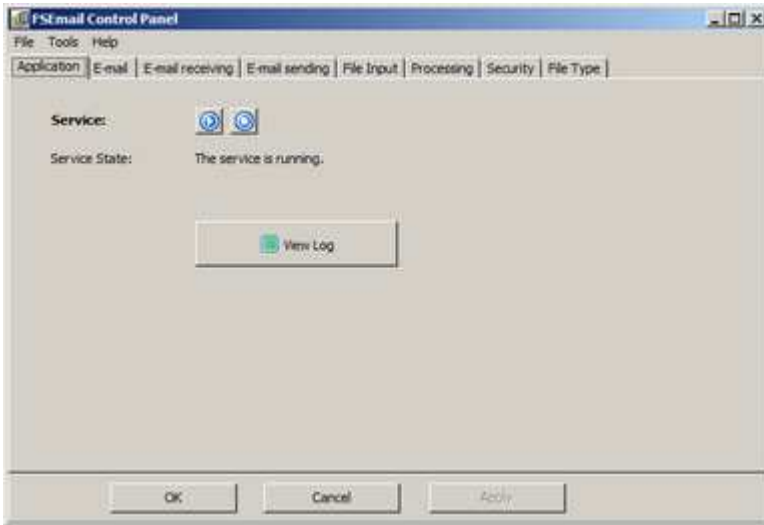
The most important settings to get started are found on the E-mail receiving tab.

On the application tab, you start and stop the FSEmail service (blue buttons), and monitor the operation by view the real-time log.

3.6 E-mail

Application | E-mail | E-mail receiving | E-mail sending | File Input | Processing | Security | File Type

E-mail address of administrator: admin@mycompany.com

☑ Send reply back to sender when processing failed
   ☐ Include original message as attachment in reply
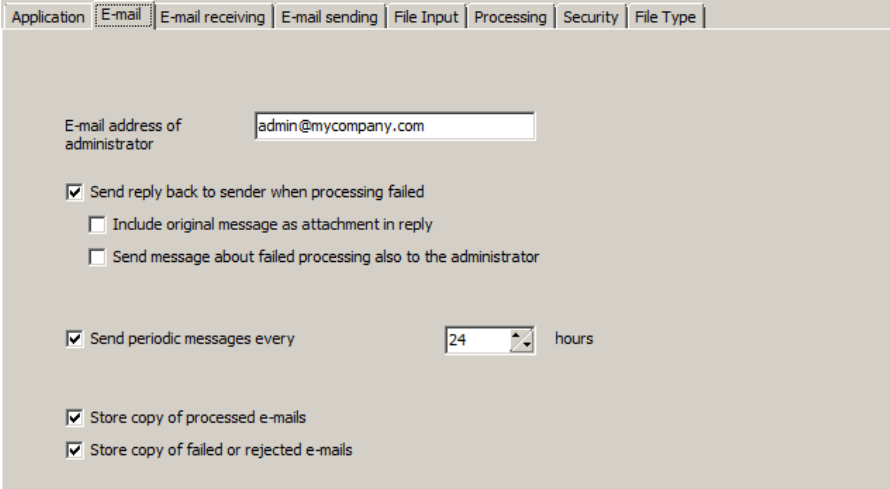   ☐ Send message about failed processing also to the administrator

☑ Send periodic messages every   24   hours

☑ Store copy of processed e-mails
☑ Store copy of failed or rejected e-mails
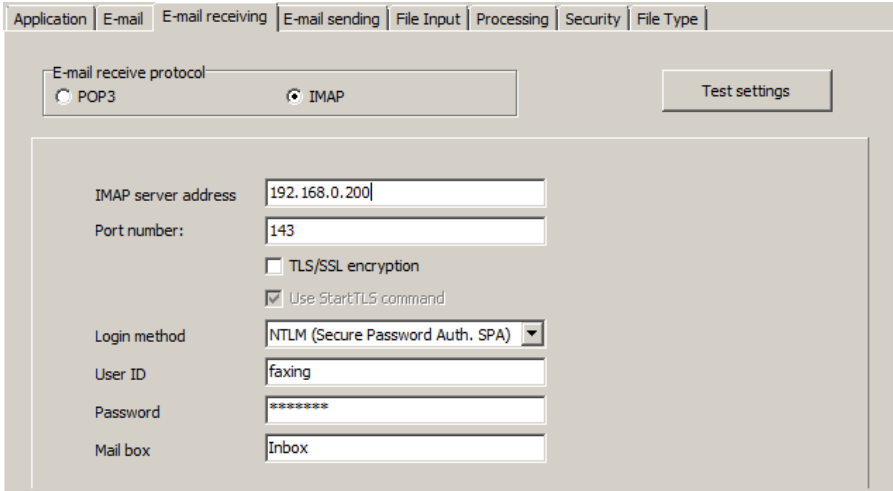
E-mail address of administrator: On this e-mail address, you receive error and informative reports, when enabled.

Send reply back to send when processing failed: FSEmail can send back a reply by e-mail when one of the attachments, for example, failed to convert to fax format. The configuration to send e-mails, is specified on the E-mail sending tab.

Send periodic message: The periodic message by FSEmail includes information such as how many e-mail were processed and how many failed.

Store copy: FSEmail can store a copy of processed or rejected e-mail (in .eml file format). It is stored in the FSEmail data directory, which is by default in the Windows application data (the common one for all users). On Windows Vista this is: C:\ProgramData\Vidicode\FSEmail3\archive.

3.7 E-mail receiving

Email receive protocol: FSEmail supports POP3 and IMAP4. You might need to enable POP3 or IMAP on your e-mail server or specifically for the e-mail account created for FSEmail.

To test if the settings correct, press the Test settings button. FSEmail will try to check the number of e-mails available, using the filled in parameters.
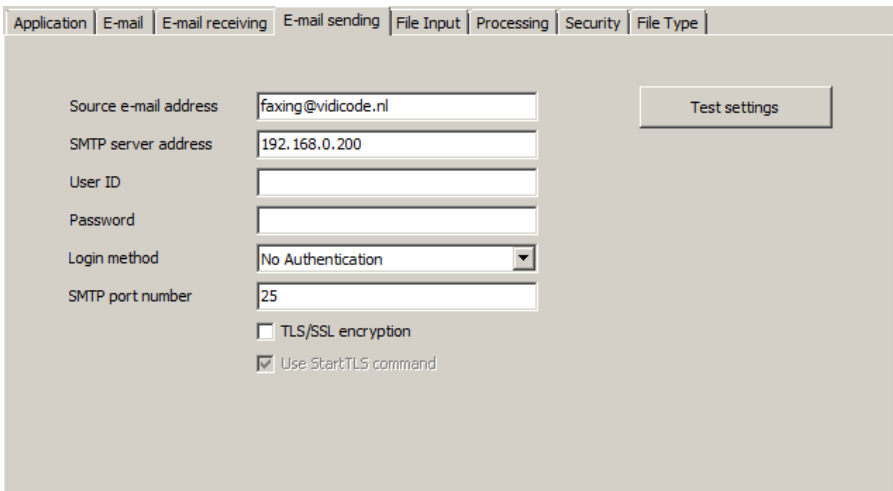
3.8 E-mail sending
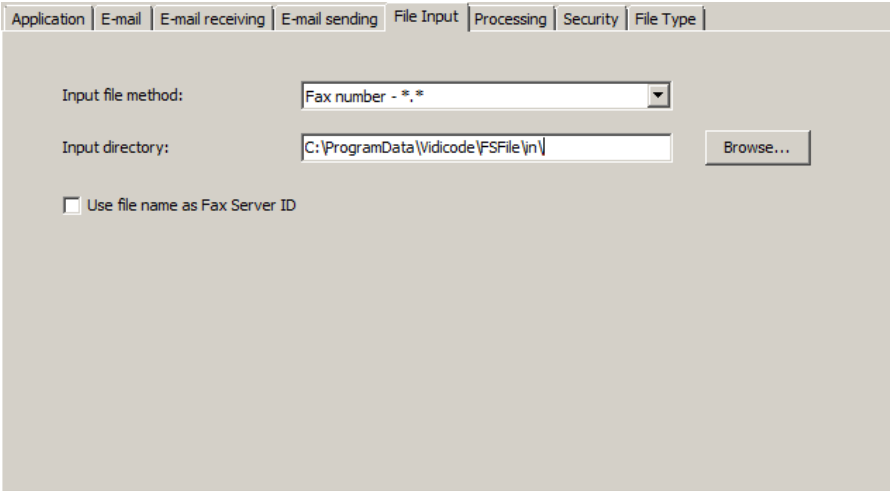
FSEmail will use this configuration to send replies by e-mail back in case of an error, and to send periodic reports to the administrator. The e-mail server must support SMTP.

3.9 File input

In addition to monitoring an e-mail account, FSEmail can also monitor an input directory. Previously this function was part of a separate application, called FSFile.

3.9.1   Input file method

Fax number - *.*

This is the default input file method.

To send a document to a fax number, create a document (for example a PDF) with the following file name:
    FAXNUMBER-anything.pdf

For example:
    003193925245-Project Proposal.pdf

The number before the first minus sign, will be used as fax number. Then place this document in the Input directory. The next time FSEmail checks **the Input directory**, it will find the new document, and handle it automatically (convert it to fax format, and send it to the Vidicode Fax Server).

.txt control file: In this case, FSEmail looks for .txt files in the Input directory.

On the first line of this file, it expects:

FAXNUMBER|COMPANY|PERSON

On the second line of this file, it expects:

FILENAME

FSEmail will then fax FILENAME to the specified FAXNUMBER. The file FILENAME must also be in the input directory. COMPANY and PERSON is used to set the sender of the Fax.

PCL file: In this case, FSEmail will only handle specially formatted .pcl files.

Archived e-mail files (.eml) that are placed in the Input directory, are handled also (regardless of the Input file method). They will be handled as if they were received by e-mail (accept that FSEmail will never send a reply back to the sender).

Successfully handled files are placed in the "out" directory, while failed files are placed in the "err" directory. To view details about the cause of an error, see the Application Log.

Use file name as Fax Server ID: When this enabled, the file name, excluding the path and extension, will be set as Fax Server ID.

3.10 Processing
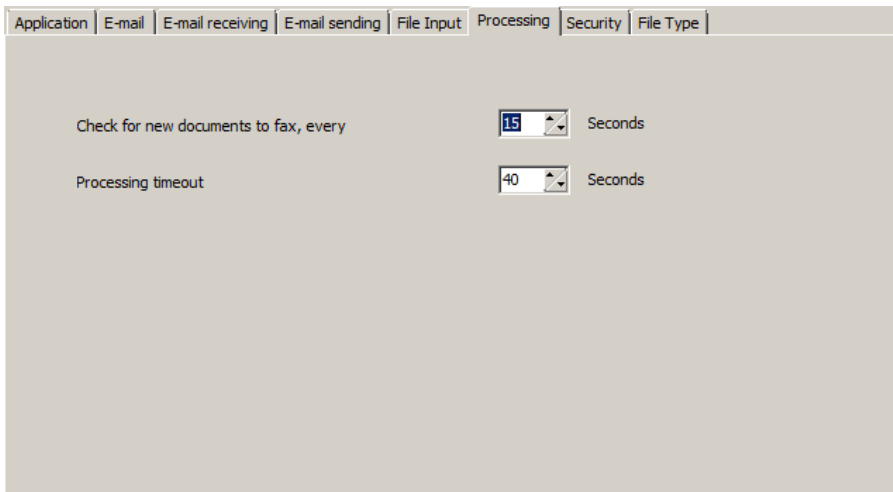
Processing timeout: If any process takes longer than this specified amount, the process is cancelled. A reply is sent back to the sender when this happens (and the option is enabled). If you set the processing timeout too high, a single incorrect document might block the whole e-mail queue. If you set it too low, a

large document might not be handled to completion before the timeout is reached.

3.11 Security
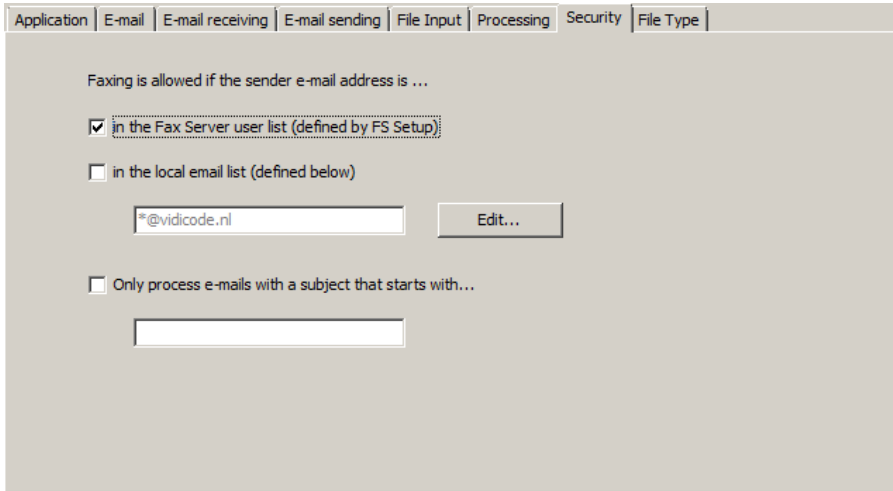
Because in principle anyone can e-mail to your dedicated FSEmail e-mail account, it is advisable to apply a form of access control to the FSEmail faxing service.

Faxing is allowed if the sender e-mail address is:
in the Fax Server user list (defined by FSSetup): FSEmail automatically downloads the user list and checks if the e-mail address of the sender is in this list.
in the local e-mail list: You can define this local list of allowed e-mail addresses in FSEmail (wildcard * is allowed).

If both options are enabled, then a sender is accepted if it is one (or both) of the lists.

Only process emails with a subject that starts with: You can designate a word or sentence that must appear at the beginning of the Subject in the e-mails that are sent to the e-mail account. When this word is not present, the e-mail will not be processed.

3.12 File type

File Type	Action
txt	exec:%SystemRoot%\system32\notepad.exe /pt "%file%"...
pcl	exec:%install%\FSEmailHelper.exe /pt "%file%" "%printer%"
htm,html	internal:ie
bmp,emf,gif,ico,j...	exec:%install%\FSEmailHelper.exe /pt "%file%" "%printer%"
doc	printto:
pdf	printto:
rtf	exec:"%ProgramFiles%\Windows NT\Accessories\WORDPA...

Buttons: Add, Edit, Delete

Tabs: Application | E-mail | E-mail receiving | E-mail sending | File Input | Processing | Security | File Type
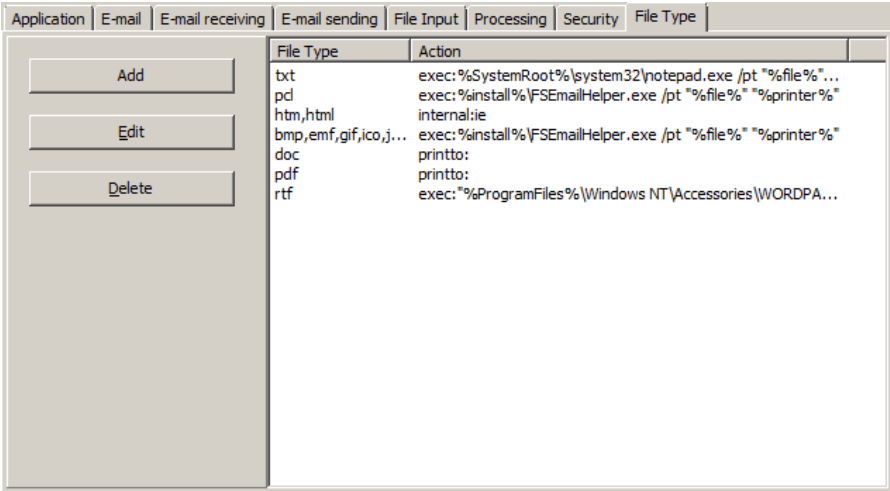
In the File Type, you can configure how FSEmail will handle different file type, that is, how it will attempt to print the file to the "Fax Server" virtual printer. Usually it is not necessary to edit this configuration.

FSEmail provides a default configuration for the following file types:

- Text (.txt)
- HTML (web pages)
- image files (such as TIF, PNG, JPG)
- Rich text files (.rtf)
- PDF and MS Word files (.pdf, .doc)

For example, image files are handled by starting a program (in this case the FSEmailHelper program).

Edit window:

File extensions:
```
bmp,emf,gif,ico,jpeg,jpg,png,tif,tiff,wmf
```

Method used to print the document
- ○ Internet Explorer
- ○ "print" command
- ○ "printto" command
- ● Start a program

Command:
```
%install%\FSEmailHelper.exe /pt "%file%" "%printer%"
```

[OK]   [Cancel]
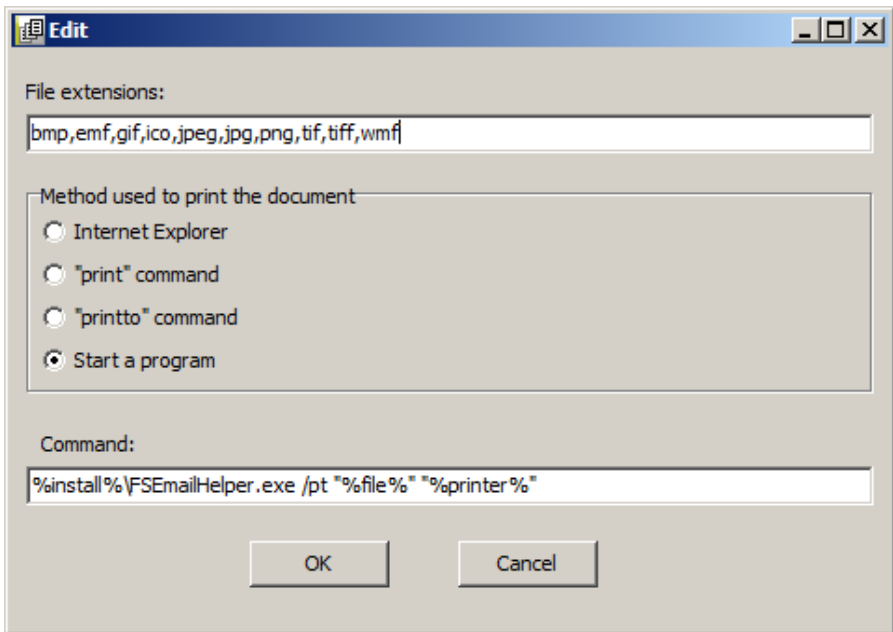
Likewise, you can define a custom command line to be executed for a special file type.
In the Command field, the following parameters are understood and replaced:

%install% : the installation directory of FSEmail
%file% : the full file path of the file that is currently handled by FSEmail (for example an attached .pdf file)
%printer% : the name of the printer that is used to convert the file (always Fax Server IP)
%SystemRoot% : the Windows directory
%ProgramFiles% : the Program Files directory

4   SendFax

The SendFax application allows you to send a fax from virtually every PC application with a print option. With the installation of SendFax a printer is added to the computer's list of printers.

Use the **print**-command in your application to transfer the document to the SendFax application by printing to the **Fax Server** printer. The SendFax application will now start up automatically. In the SendFax application one or more recipients can be chosen from an address book. New entries to the address book can easily be made.

SendFax has a preview function that allows you to have a last look at the fax before sending it off. When **SendFax** is clicked the fax is uploaded to the Fax Server that will automatically take care of the fax transmission. After fax transmission the Fax Server can report the transmission result back to the User of SendFax through E-mail.
SendFax can create Attachments that can be appended to a fax. Attachments can be saved and used again or deleted after sending. Use the SendFax Attachment printer to create an attachment.

4.1 Installation

If you have FS Email installed, SendFax does not have to be installed separately. When you place the CD-ROM in your computer the installation process will start automatically.
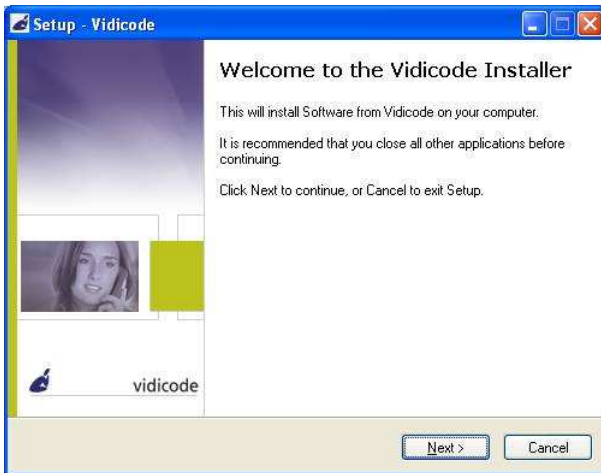
In a following screen you will be requested to enter the Installation Key. This key is supplied with the software.

You are licensed to use this key on as many PC's as you like within the network that the Fax Server is on.

To continue installation, follow the instructions on the screen.

4.2 How to set up SendFax for use

Before you can send faxes from your PC you must tell your PC the network address (IP address) of the Fax Server and identify yourself as a user of the Fax Server.

Setting up the SendFax application presumes the presence of a Fax Server in the network.

Start up the SendFax Options by clicking **Start**, select **Programs**, select **Vidicode** and select **SendFax Options**. The SendFax Options dialogue has five tab pages.

> Network, for the network settings,
> User ID's, to set default sender,
> Sending, for all fax transmission settings
> Address List, to manage your contacts list
> Cover Page, to configure the cover page you might sometimes want to use

4.2.1 Connection to a Fax Server

When SendFax Options is launched it will start with the network tab.
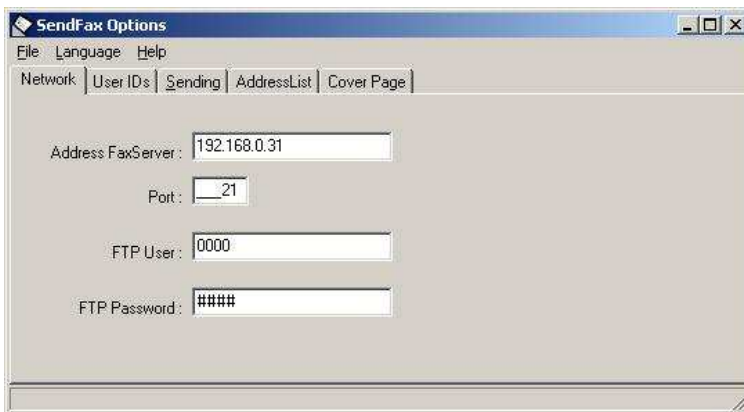
Now enter the network properties of the Fax Server as in the figure above.

- **Address Fax Server** is the IP address or name of the Fax Server that you want to connect to.

- **Port** is the FTP server port through which the connection is to be made. The FTP server port of the Fax Server is default set to 21. Do not change the **Port #** when this value is not explicitly changed in the Fax Server.

- **FTP-user** is your FTP user as it was handed to you by the network administrator.

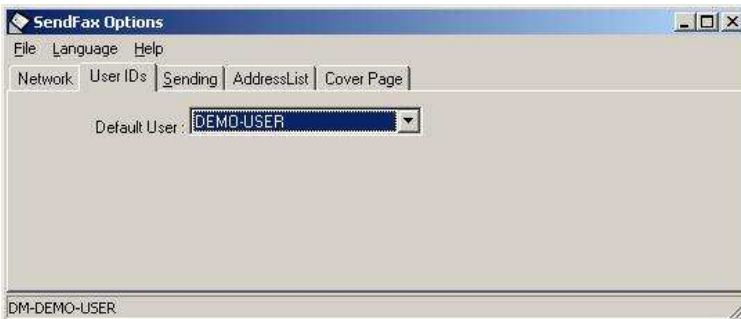- **FTP password** is your FTP password as it was handed to you by the network administrator

4.2.2   Identification as a user

Continue by selecting the "IP Fax User IDs" tab.

The SendFax application will now download the user list from the Fax Server. The following dialogue appears:
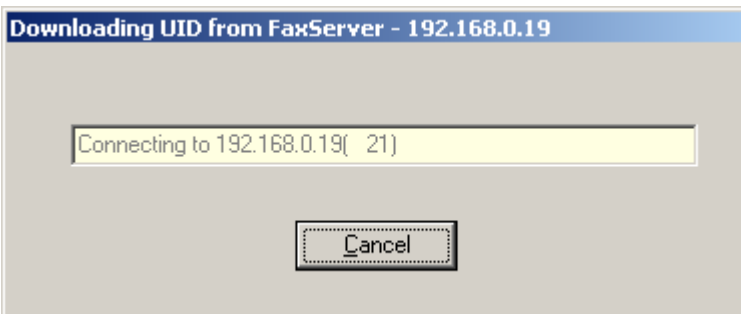
When the user list is downloaded successfully the "Fax User IDs" tab appears:

The "Default User" drop box contains the list of user's profiles.
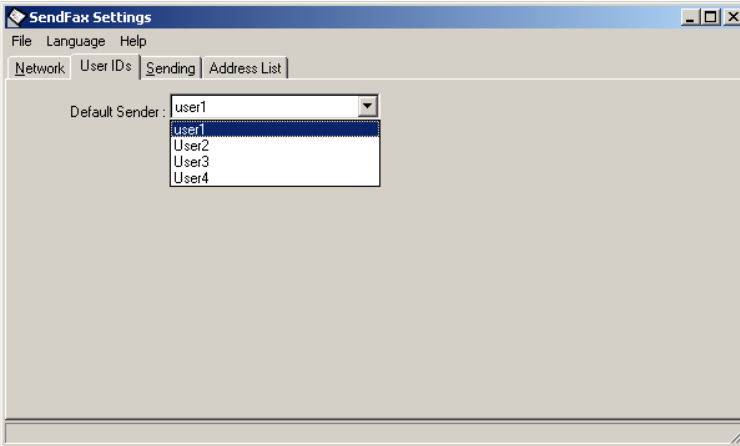
In this example the users 1 through 4 have been created. Normally the Network administrator will use your name as username.

- Select your own name from the list.

If your user profile is not in the list contact your system administrator. Login accounts on the Fax Server are created with the **Fax Server Setup** application.

4.2.3   Configuration of fax transmission settings

- Select the sending Tab. The sending options are also available while sending a fax.

The default fax transmission settings of the Fax Server can be determined with the settings for sending.

You can always change these settings when sending a fax by selecting this tab again.
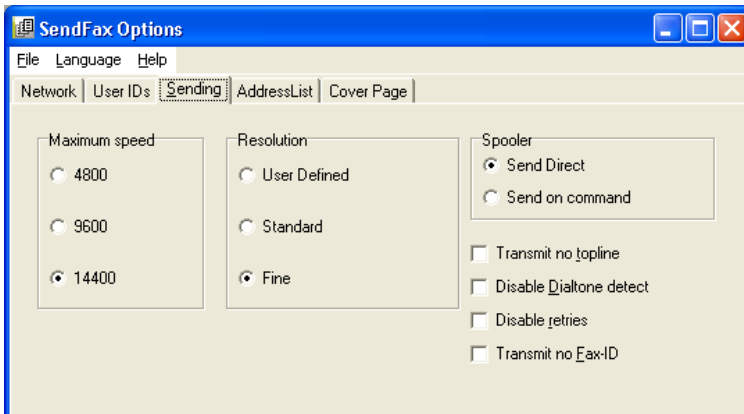
The normal **maximum transmission** speed is 14400 bps. Usually you will not change this as a default setting. A low maximum transmission speed can be effective however when sending to a destination with a very poor line quality. It must be understood that the Fax Server will also automatically try a low transmission speed when it encounters a poor line. This however takes time that can be saved.

Resolution. It is most common to use fine resolution. To select standard resolution will result in a lower telephone bill at the cost of fax messages that are of reduced quality, but should still be readable.
**Transmit no Top line** will withhold the top line from being sent.
Disable Dial tone detect will disable dial tone detection of the Fax Server
Disable retries disables the retry setting of the Fax Server.
Transmit no Fax ID will withhold the Fax ID from being sent.

4.2.4   Configuration of the address book

You can enable the use of MAPI to make the fax numbers of your MS Outlook contacts available when you send a fax.
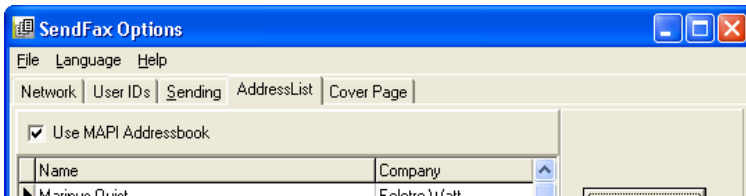
MS Outlook contacts can only be used when MAPI is installed on your PC. This completes the configuration for sending faxes on your PC. Save the settings as follows.

- Select **File** in the menu.

- Select **Save** to save the settings.

The saved settings apply to all the faxes that are sent with the SendFax application.

4.3 How to send a fax

Faxes can be sent from any PC application with a print option.

- Open the PC application that you want to send a fax from.

- Select and open the document you want to send as fax.

- Select the **Print** command.

- Select the **Fax Server printer** from the list of printers.

- Click **OK**.

The SendFax application will now open.
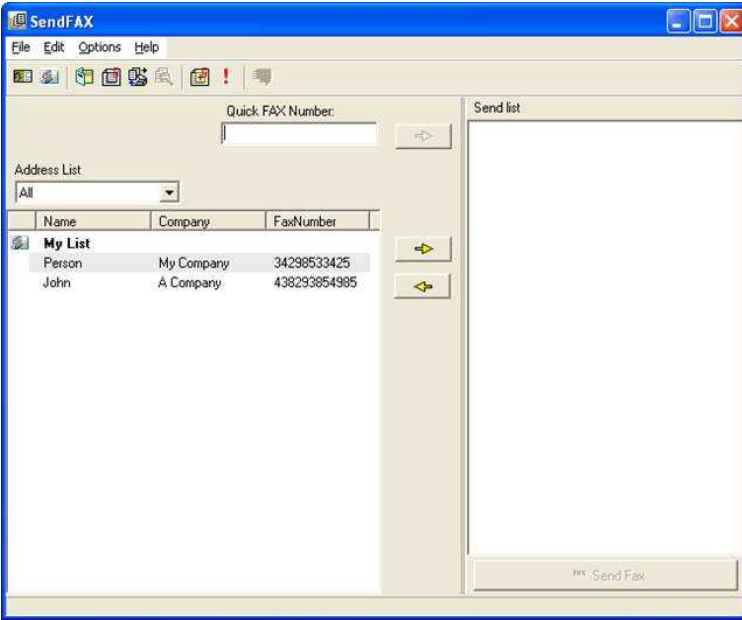
The dialogue allows you to create a single destination or list of destinations that the fax must be sent to. You can select Fax Numbers from the address list or enter a number in the Quick FAX Number field. Therefore there are 3 ways to add destinations to the send list:
To use a fax number form your address list, select the number and click the **=>** button
To fax to a number that you do not want to remember, enter the number in the Quick FAX Number field. Then click the **=>** button. You can add as many Quick Fax Numbers as you like.

- Add a new contact and use this new entry in the address book
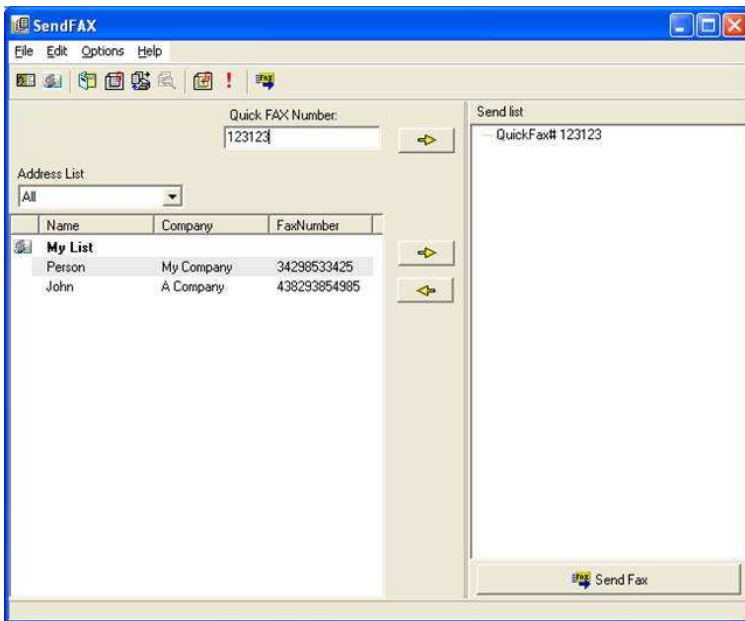
When the list is completed, click the **SendFax** button.

The fax will now be uploaded to the Fax Server which will take care of the actual transmission of the fax.

4.4 To create a priority fax

It is possible to configure a Fax Server to only start sending faxes after the Start Send Fax time. This is useful when there is an application in your network (an accounting program or an order program) that sends batches of many faxes that you like to broadcast outside office hours.

When Send Start Time is enabled on the Fax Server it is still possible to send a fax directly. In this case the fax should be marked as Priority fax.

A fax is marked Priority fax with the tool button:

4.5 To create and append an attachment

Many users have documents that they often want to use as an attachment to faxes. Examples are brochures, price lists, registration forms, etc.

Attachments can be created from any application with a print option.

- Open the PC application that you want to send a fax from.

- Select and open the document you want to send as fax attachment.

- Select the **Print** command.
- Select the Fax Server attachments printer from the list of printers.
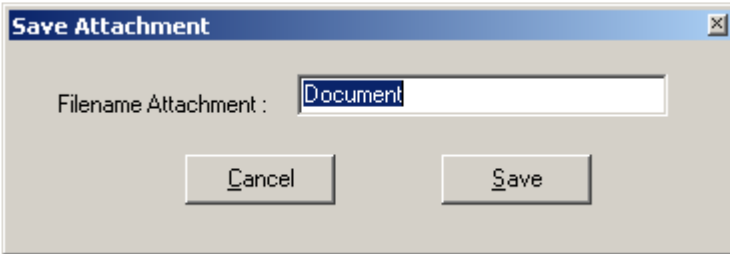- Click **OK**.

The SendFax Attachment dialogue will now open.

Save Attachment

Filename Attachment : `Document`

Cancel   Save

- Click **Save** to save the Attachment.

The Attachment is made and saved. The attachment can now be used and appended to a fax in the SendFax as follows:

- Create a normal fax as described in the previous paragraph.
- Choose **Edit** from the menu and select **attachment**

The following dialogue opens:

Attachments

☐ AttachSave
☐ Document
☐ pr010304 (2).pdf
☐ pr081003.pdf

☑ Delete Attachment after send

Cancel   Ok
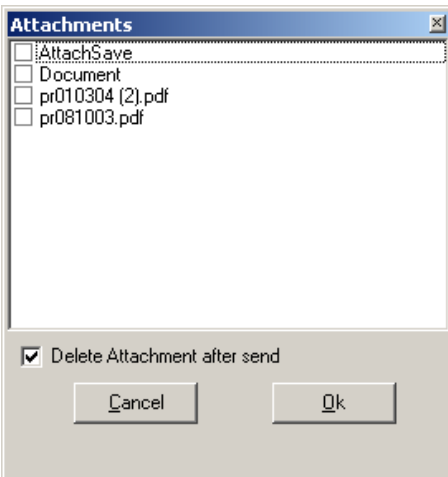
- Check the attachment checkbox of the attachments.
- Click OK.

The entire fax with attachment can be viewed in the Preview as described below.

4.6 Preview your fax before sending

The SendFax application has a **Preview** function to provide a last look at the fax before sending it off.

- Click the **Preview** tool button to open the preview.
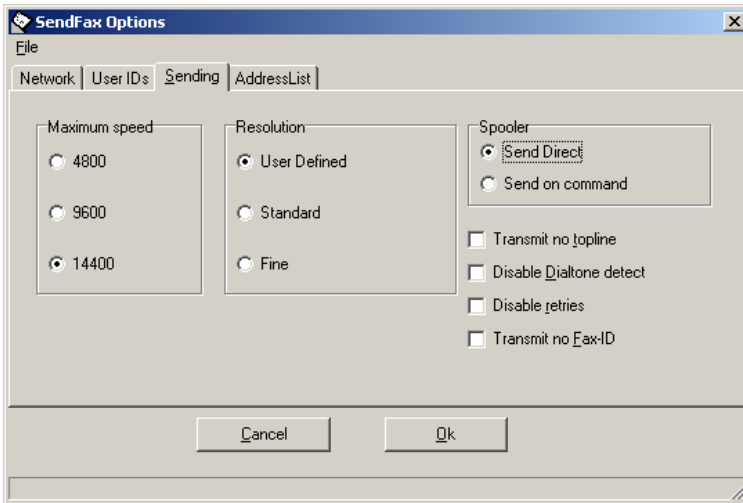
The following dialogue opens:

Use the tool buttons to rotate the fax image, zoom in and out and scroll through the fax pages.

4.7 Send a fax later

The sending of faxes can be postponed to a later time. This can be used to send the faxes at a later time against lower rates.

- Select **Settings** in the menu.

- Select SendFax Options.

- Select the **Sending** tab.

- Check Send Direct or Send on Command.

In case **Send On Command** is checked sending the fax will move the fax to the fax spooler, which will consequently appear in your taskbar. The Sent fax will have the **paused** status. Sending the fax is initiated as follows.

- Double click the **Fax Spooler** icon in the taskbar.

- Select the paused fax you want to send.

- Select **Document** in the menu.

- Select **Restart**.

The paused fax will now be uploaded to the Fax Server, which in turn will take care of the transmission of the fax.

4.8 Address list

SendFax works with two lists of fax numbers. You can choose the list in the drop box "Address list". The options are All, Only the (Outlook) Contacts, and only the Send Fax address list.

Your Outlook contacts must have the fax number entered or else the contacts will not appear. The Outlook contacts are only available when you have enabled MAPI in the SendFax configuration. In the Outlook contacts there are several entries for a fax number possible: "Business Fax", "Home Fax", "Other Fax". Send Fax will create multiple entries for these contacts and will write the description between brackets behind their names.
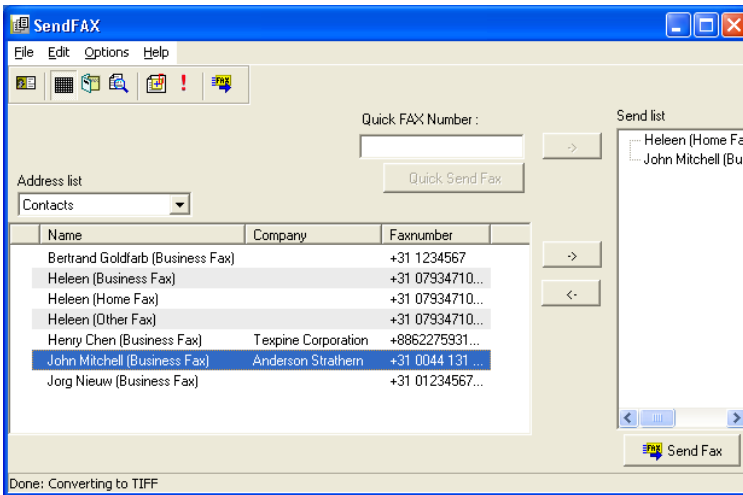
The contacts list has three properties: Name, Company and fax number.
The example above displays seven entries in the contacts list.

- Select and right click an entry in the list

- Click the arrow to copy contact to the send list.

The right click menu allows for the following operations:

Search, search the contacts list for entries on Name, Company or Fax number.
Delete, to remove the entry from the list.
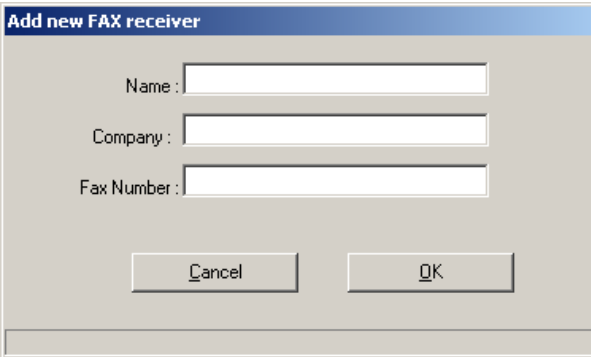**Edit entry**, to edit the entry properties.
->, to copy the contact to the send list.

4.9 Add a new contact

New entries can be made to the Send Fax address list.

- Select **File** in the menu.

- Select New FAX contact.

The **Add new FAX receiver** dialogue opens.

- Enter the information of the new fax contact; name, company and fax number.

- Click **OK** to add the new FAX contact to the address list.

Please note that it is NOT possible to create or edit an entry in your Outlook Contacts from Send Fax.

4.10 Edit contacts list

The entries in the address list can be edited.

- Select **Edit** in the menu.
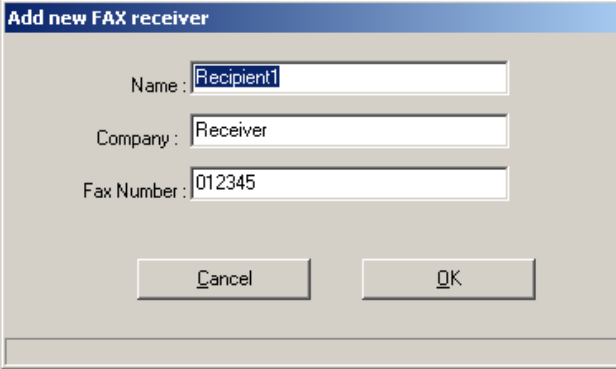
The following options appear:

Search allows you to search the address list for name, company or fax number.
Search next searches for the next entry of the search term.

Filter is a function that allows you to find an entry in the list quickly. The filter can be turned On and Off. Only those names will show up in the list that contain the characters entered in the filter edit fields.

Delete will remove the entry from the address list.

Edit entry allows you to modify company name and fax number of the selected entry as follows:
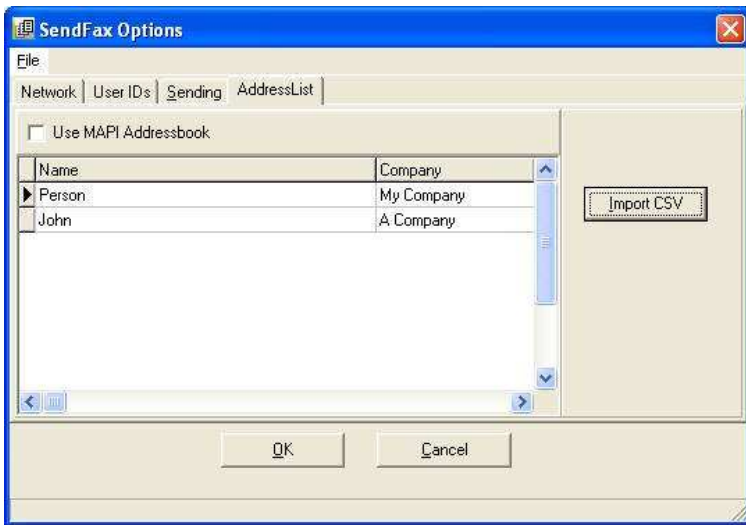

A contact can also be edited by selecting and right clicking of a contact.

4.11 Import an address book

The SendFax allows for the import of the address book of another application.

- Select **Settings** in the menu.

- Select SendFax Options.

- Select the **AddressList** tab.

A dialogue opens that allows you to select a **C**omma **S**eparated **V**alue file.

- Click the **Import CSV** button.
- Press the button to browse to the location of the file.
- Click **Next**.

Select the Name, Company and Fax number item of your choice.

- Click Finalize.

4.12 Cover Page

The SendFax has the ability to include a cover page in front of a fax message.

- Click the ![icon] tool button to open the Cover page dialogue .

There are various options to enter fax properties and text.

- Press **Preview** to check if everything looks the way you want it.
- Press **Close** to return to the SendFax application.

The Cover page can be adjusted and edited to your personal requirements in the Cover page settings as described in the following paragraph.

You can view the fax including the cover page before sending it off in the SendFax Preview. See § 4.4 for details.

4.13 Cover Page layout and settings

There are various changes that can be made to the cover page. A company logo can be used and the background can be selected. Other settings include alignment and text. The cover page settings are situated in a tab page of the SendFax Options.

- Choose Windows Start and select the Vidicode programs.

- Select SendFax Settings

The SendFax settings dialogue will open

- Select the Cover page tab
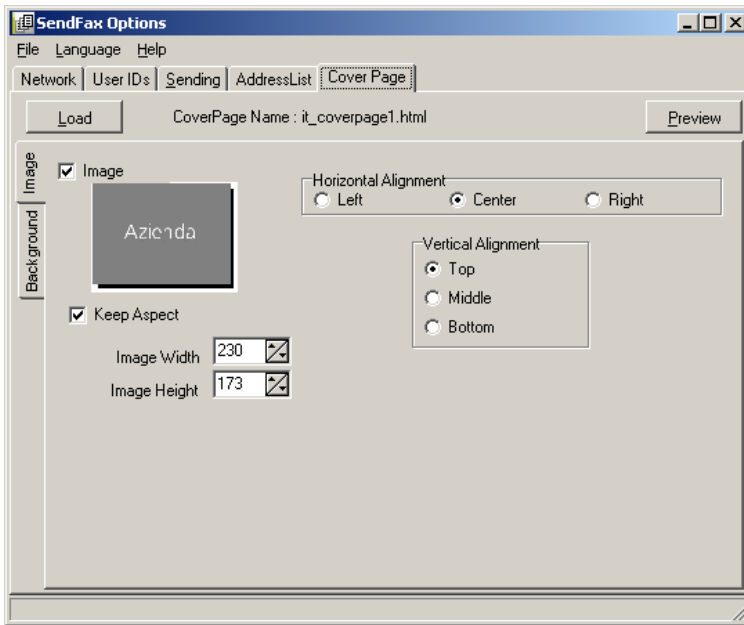
The cover page tab:

The cover page tab holds three vertical tab pages: Picture and Background. Select the tab pages and check the checkbox to enable the feature. The size and alignment can be set. Also the Background can be edited and adjusted to your personal requirements.

Cover pages can be saved individually. Enter a name for a cover page and click **Save**. Use the **Load** function to change between saved cover pages.
The **Preview** is used to evaluate the cover page settings.

To view a fax together with the cover page one has to use the general Preview from the SendFax application as described in § 4.6.

5   FS File

If you have FS Email installed, FS File does not have to be installed separately.

FSFile can send as fax all files in a directory. FSFile works in combination with the SendFax software and the Fax Server.

FSFile periodically checks a directory for new files, converts the files to a faxable format, and sends the data to the Fax Server.

5.1 Installation

The following components must be installed on a single computer:

- FSFile

- SendFax [installed on the same computer as FSFile]

- Applications for the file types that must be faxed: [installed on the same computer as FSFile]

For example, if you want to be able to fax PDF-files, a PDF Application (Reader) must be installed. The application must understand and respond to the "Print" command, by printing the file to the default printer, without showing a confirmation dialogue . To test this, you can right-click on a file in File Explorer, and select Print.

5.2 Configuration

This topic only describes the configuration of FSFile. SendFax also needs to be configured with the IP-address, and FTP login name and password for connecting to the Fax Server.

The FSFile configuration screens:

5.2.1   Directories
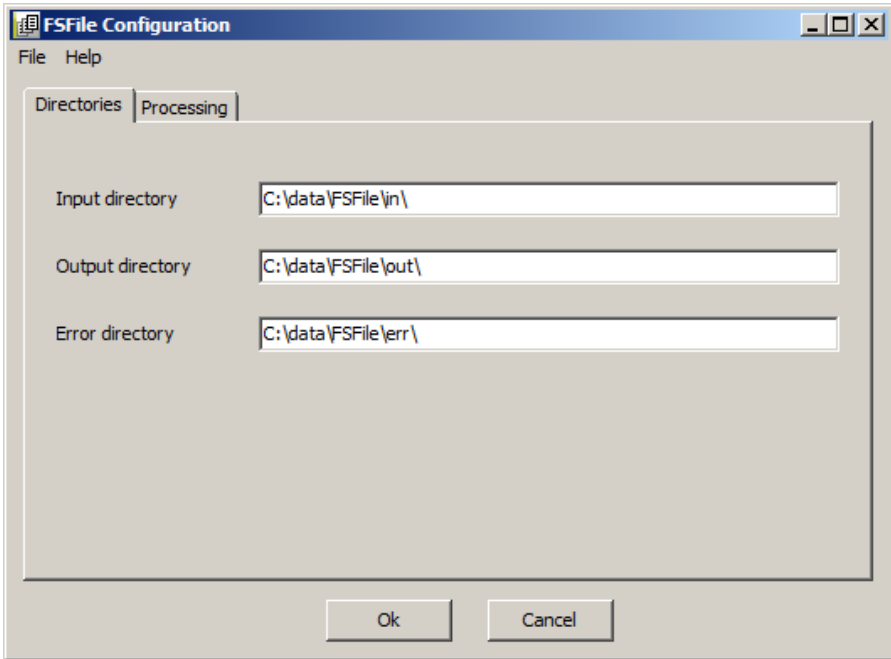
The Input directory will be scanned periodically by FSFile. Handled files are removed from the input directory, and move to the Output directory, when successful, or to the Error directory, when an error occurred.

5.2.2   Processing
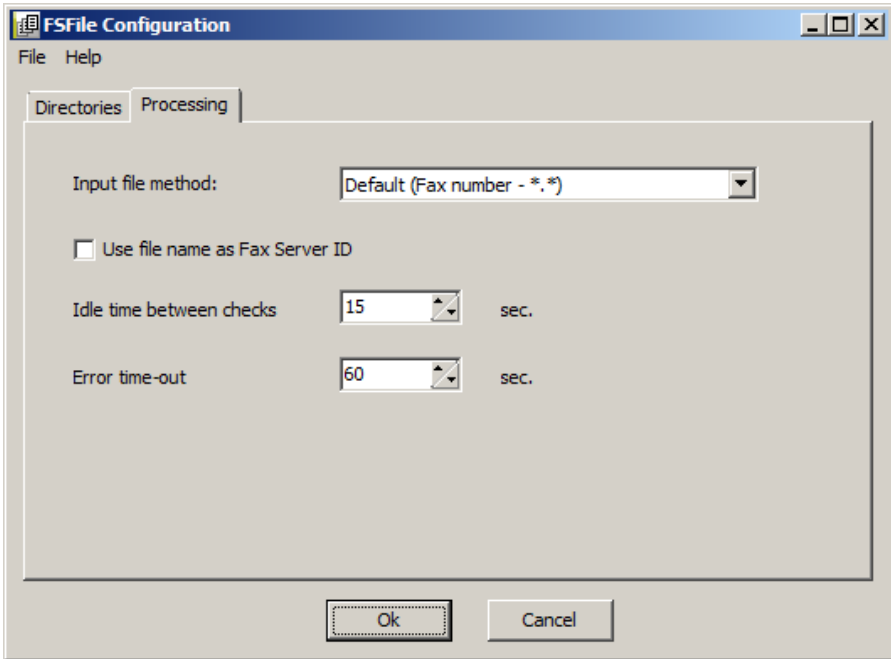
Input file method: For an explanation of the default method, see Usage

Use file name as Fax Server ID: When this enabled, the file name, excluding the path and extension, will be set as Fax Server ID.

Idle time between checks: The sleep time between two checks of the Input directory by FSFile.

Error time-out: If a document takes longer than the specified time to convert to fax format (by virtual printing), it is cancelled.

- Click Ok to save the configuration. FSFile will load the new configuration for the next directory check.

6   Fax Server Access System

6.1 Introduction to Fax Server Access System

The Fax Server Access System is a PC application that allows you to access one or more Fax Servers over the network. A Fax Server act's like an FTP server on the network. The Fax Server Access System shows the Fax Server's database. Each record in the database represents a fax. The Fax Server Access System can keep the database up to date automatically. The faxes in the database can be viewed with the build in fax-viewer. The viewer allows you to browse through the database of the Fax Server. The Fax Server Access System supports the use of up to four Fax Servers.

There is a special version of the Fax Server Access System software, which goes with the Fax Servers with the fax recording option. This version has an extra feature that can convert the audio recordings of fax transmissions to the original document.

The most important feature of the Fax Server is that it builds an archive of all faxes ever sent or received. The Fax Server Access System that you will find on the CD you have received with the Fax Server allows you to access the Fax Server database over the network.

The main dialogue of the Fax Server Access System shows the part of the Fax Server's database that you are allowed to see. Each record in the database represents a fax. The faxes stored in the records of the database can be viewed with the build in fax-viewer. The viewer allows you to browse through the database of the Fax Server. In the database searches and selections can be made and queries executed.

6.2 Fax recording (option)

The Fax Server ISDN and IP with recording option can make audio recordings of the fax transmissions of other fax machines. The Fax Server Access System can convert the recorded audio back to the original document.

The purpose of fax recording is to keep the database of all faxes complete, also when a fax was sent while still using a traditional fax machine.

Recording of fax transmissions is only possible when the Fax Server is connected to the same line(s) as the fax. With multi channel fax machines this is the most common way to connect the Fax Server. With the Fax Server IP, that usually replaces a traditional fax machine, the fax machine is connected to the secondary port at the back of the Fax Server IP.

With the Fax Server with fax recording option, comes a special version of the Fax Server Access System software. This version has an extra feature that can

convert the audio recordings of fax transmissions to the original fax document. See § 6.19 for a detailed description of this extra feature.

6.3 Installation

Installation is identical to that of Send Fax, the only difference being that you must now enter the license number of Fax Server Access System. Follow the instructions on the screen.

6.4 Main dialogue on Start-up

Start up the Fax Server Access application by clicking **Start**, select **Programs**, select **Vidicode** and select **Fax Server Access System**.

The main dialogue looks like this:
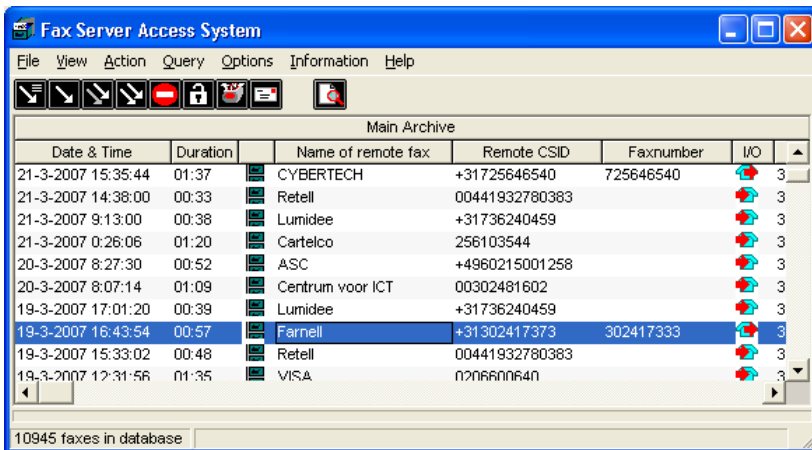
The main dialogue holds a traditional menu and a bar of tool buttons with tool tips. The tool buttons are described from § 6.11 onwards.

6.5 Setting up a Fax Server connection

You can only access a Fax Server when the IP address, your user ID and your password are known. Your systems manager who has configured the Fax Server can give you the password that gives access to all faxes in the Fax Server or to a selection thereof that you are allowed to see.

Setting up a connection with a Fax Server requires a few properties to be entered.

- Start up the application.

- Click **Options** in the menu.

- Select the **FTP Profiles** tab.

The properties of four different Fax Servers can be entered here. Enter the properties of the Fax Server in the fields of **Profile Fax Server 1**.
IP Name or IP Address is the IP Name or number of the Fax Server that you want to connect to.
FTP User and **FTP Password** are the username and password of your login as they were given to you by the system administrator. Login accounts on the Fax Server are created with the **Fax Server IP Setup** application. The properties of the user account determine which faxes on the Fax Server can and cannot be viewed by the user.
ID is the factory set ID of the Fax Server and cannot be changed. This ID is automatically displayed after a connection with the Fax Server has been established.
Port # is the FTP server port through which the connection is to be made. The FTP server port of the Fax Server is default set to 21. Do not change the **Port #** when this value is not explicitly changed in the Fax Server.
**Allow access to Fax Server** allows the application to access the Fax Server database. Check if a connection is needed; uncheck if a connection is not desired.

- Click **Apply** for the settings to take effect.

- Select **Action** in the menu.

- Click **Update Database** to update the database from the Fax Server, see § 6.11 for details.

The application will now connect to the Fax Server and retrieve the database.

6.6 Viewing a Fax

The main dialogue of the application display's a list of records of the Fax Server's database.
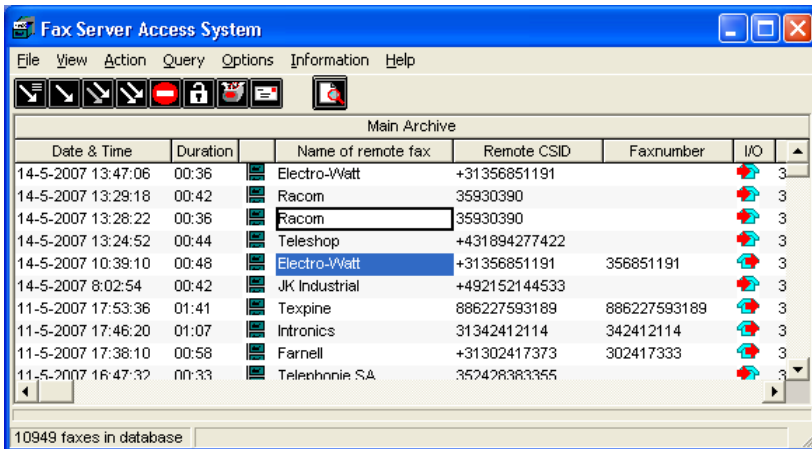
Each record represents a fax. To view a fax:

- Select a record in the database and click the tool button.

The application will now connect to the Fax Server and retrieve the fax image. The fax will be displayed in the Fax Viewer. With the Fax Viewer you can scroll and browse through the Fax Server's database. The Fax Server Access System application and the Fax Viewer can be made to fit your screen together.

- Select **View** in the menu.
- Select **Pane**.

When you move up or down through the database using the buttons of the fax viewer, the record belonging to the viewed fax will be selected in the Fax Server Access System application. The fax viewer is described in detail in the next paragraph.

6.7 Browsing the database, the viewer

The **Fax Viewer** allows you to browse through the database of the fax.

The double arrowed buttons and let you browse through the records of the database.

The single arrowed buttons and let you scroll through the pages of the selected fax message.

The buttons ⬚ and ⬚ respectively fit the width and height of the fax image to the size of the Fax Viewer.

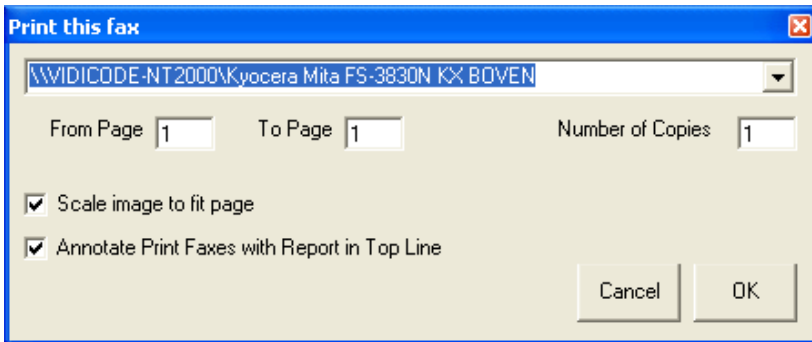The printer button 🖨 allows you to print a fax.

The rotation button ⬚ rotates the fax image a quarter turn clockwise.

The save button 💾 lets you save the fax image as bitmap.
The slider on the bottom of the viewer window allows you to zoom in and out.

6.8 Printing of faxes from the viewer

- When you print a fax from the viewer you see the following dialogue :

It allows you to select the printer and offers two properties:

 - To scale the fax to fit the page. This option is recommended because faxes can be longer and wider then the paper in your printer. You must know that the fax image, however, is not on its original scale which usually will not easily be noticed.

 - To annotate the fax with report line. This is useful when archived faxes are printed as documentation. The origin of the document will be easier understood.

6.9 Open an existing Archive

The main dialogue of the application displays the **Main Archive**. All the records representing faxes are displayed in the **Main Archive**. Archives are represented by a file called *archive*.**MDB**. Other archives can be opened as follows.

- Click **File** in the menu.

- Select Main Archive.

A dialogue opens that allows you to open an Archive.

- Browse to the archive that you want to open by selecting the file *archive*.**MDB** in the desired folder.

- Click **Open**.

Read Only archives, like archives stored on CD can be opened as follows.

- Click **File** in the menu.

- Select Archive on CD.

The same dialogue opens again.

- Browse to the archive on CD that you want to open by selecting the file *archive*.**MDB** in the desired folder.

- Click **Open**.

6.10 Create a new Archive

New Archives can be created as follows.

- Click **File** in the menu.

- Select Main Archive.

A dialogue opens that allows you to open a new Archive.

- Browse to a location in your computer where you want to open a new Archive.

- Click **Open**.

You are now prompted with the question whether you want to open a new Archive in this folder. Confirm to open the new Archive.

6.11 Update the Database

To find out if new faxes have been received the database must be updated.

- Click the [icon] button or choose **Action** in the menu and select **Update database** to update the database.

The application will connect to the Fax Server and request a listing of the database. The application will add all the new records of the database to the records in the archive.

6.12 Updating the database automatically

- Select **Options** in the menu.

- Select the Schedule and Viewer tab.

- Check **Unattended download operation** and select the appropriate time interval.

Check **Download listings only** to have only the records updated.

Check **Minimize on program** to have the application start minimized in the taskbar.

6.13 The Cache

During normal use of the Fax Server Access System application the fax images are downloaded for viewing only. After viewing the fax the data of the fax image are erased. The next time the fax will be viewed the fax image is downloaded from the Fax Server again. The described cycle can be repeated indefinitely. Images of faxes that have been received less then thirty day's ago are stored in cache memory. After viewing a recently received fax the fax image remains available from the cache for viewing. At the start of the program the application checks for redundant data in the cache. If the reception of a fax took place more then thirty days ago the fax image will be removed from the cache.

6.14 Download faxes permanently

If it is necessary to download the images of viewed faxes permanently the cache routine as described above can be switched off.

- Select **Options** in the menu.

- Select the Schedule and Viewer tab.

- Uncheck Keep viewed faxes on Server only.

- Now if a fax is viewed the image of the fax is permanently downloaded to the hard disk of the PC. Other ways to download fax images permanently are described below.

6.15 Mark records for transfer to PC

Fax records can be marked for downloading of the fax image at a later time.

- Select the records that need to be marked.

- Select **Action** in the menu.

- Select **Select** for transfer to PC.

- Select Selection.

All the records in the archive can be marked for download by selecting **All** in the last operation. Remove the marking of the marked records by choosing **Deselect All** in the last operation.
Fax images of marked records can be downloaded as follows.

- Select **Action** in the menu.

- Select Transfer to PC.

- Select **Marked Records,** this operation is performed straight away with the ⬔ tool button.

6.16 Transfer records to PC

Fax images can be downloaded directly

- Select the records of which the fax images need to be downloaded
- Select **Action** in the menu
- Select Transfer to PC
- Select **Selected Records,** this operation is performed straight away with the ⬔ tool button.

The fax images of all the records in the archive can be downloaded at once by selection **All Records** in the last operation. This operation is performed straight away with the ⬔ tool button.

6.17 Deleting records from the Archive

Records and faxes can be removed from the different archives.

- Select the records to be removed
- Select **Action** in the menu
- Click Delete Selection

Removed records are all moved to the **Recycle Bin**. The contents of the **Recycle Bin** can be viewed as follows.

- Click **File** in the menu.
- Select Recycle Bin.
- Return to the Main Archive by
- Click **File** in the menu.
- Select Main Archive.

6.18 Restore deleted records

Records and faxes in the Recycle Bin can be restored to the main archive as follows.

- Select the records that you want to restore
- Select **Action** in the menu
- Click Restore Selection

6.19 The fax converter

There is a special version of the Fax Server Access System which goes with the Fax Server with fax recording. This version has an extra feature that can convert the audio recordings of fax transmissions to the original document. Settings concerning the conversion of fax recordings can be found in § 6.24.3.

6.19.1   Convert recorded faxes

Recordings of fax transmissions are displayed with a blue icon where faxes from the Fax Server itself are displayed with a green icon. Recordings of fax transmissions can be converted as follows.

- Select the recordings you want to convert.

- Select **Action** in the menu.

- Select **Conversion to fax** in the menu.

- Select Selected recordings.

The selected recordings will now be converted one at the time.

Note ! Recordings have to be downloaded before they can be converted.

To convert all recordings in the database select **All recordings** in the **Conversion to fax** menu.

6.19.2   Remove failed conversions

It happens that the transmission of a fax fails. This can be for various reasons. The remote fax machine may be busy, the number can be wrong or something may happen during the transmission. A fax machine will usually try several times to send a fax when earlier attempts fail. When the fax recording function has been enabled all failed fax transmissions are recorded. It is only when these recordings are converted that one can find out if the transmission succeeded. Recordings that fail to convert will have an icon with a red cross over it. Recordings that fail to convert can be removed from the database as follows:

- Select **Action** in the menu.

- Select **Conversion to fax** in the menu.

- Select Delete entries for Audio without fax.

- All recording that failed to convert will be removed from the database.

6.19.3   Export faxes from the archive

The program has a feature where entries from the database can be exported as separate files. Both recordings, those that converted and those that failed to convert, and fax images can be exported.

- Select **Action** in the menu.

- Select **Export** in the menu.

- Choose **TIF** to export a fax image. A dialogue will open where the fax can be given a name. Faxes will be stored as Tiff-files and are by default stored in the **C:\Program Files\VIDICODE\Fax Archive\MyFaxes** directory.

or

- Choose **WAV** to export a fax transmission recording. A dialogue will open where the recording can be given a name. Recordings are stored as ADPCM wave files and are by default stored in the **C:\Program Files\VIDICODE\Fax Archive\WAVE** directory.

6.20 Build a CD Archive

The Fax Server Access System application has a special feature that allows you to create Archives that can be saved on CD. These archives are called **CD Archive**'s. Only downloaded faxes can be saved in the CD Archive.

- Select the faxes that you want to add to the **CD Archive**.

- Select **Action** in the menu.

- Select Build CD Archive

- Click **Add Selection** to add the selection to the CD Archive.

The selected faxes are now added to the last CD Archive. A new CD Archive is opened automatically when the size of the current CD Archive exceeds the set maximum size. The maximum size for these CD Archives can be set as follows.

- Select **Options** in the menu.

- Select the Security and CD's tab.

- **Maximum bytes on CD** sets the limit to the size of the CD Archives. This value is default set to 650Mb.

Once you have saved the CD Archives on CD the CD Archives on your hard disk can be removed.

- Click **Erase All CD Archives** in the **Security and CD's** tab to remove all CD Archives.

The consecutive CD Archives are called **CD0, CD1, CD2** etc.. The CD Archives are stored in the folder C:/Program Files/Vidicode/Fax Archiver/CD Build.

6.21 Complete Name fields

Each record in the archive can be given a name.

- Double click the field in the **name of remote fax** column of the record.

When the field turns light-yellow a name can be entered. The Fax Server Access System associates the given name with the remote fax ID of the record, or if that is not available with the telephone number that the fax was sent to or that the fax was received from. From that point on the Fax Server Access System will automatically assign the same name to all fax records with the same remote fax ID. To complete the name fields of already received faxes of which the remote fax ID's were not associated with a name proceed as follows.

- Select **Action** in the menu.

- Select Complete name fields.

- All the records in the Archive which name can be associated with a remote fax ID will be assigned the name associated with that remote fax ID.

- It is not always necessary to give names to remote fax machines. When users send a fax from their telephone book to a remote fax the name of the remote fax is remembered and will be used if no other name was given.

6.22 Perform queries on the main archive

Different queries can be performed on the records in the main archive. Select **Query** followed by **Define your Query** and the query dialogue opens:
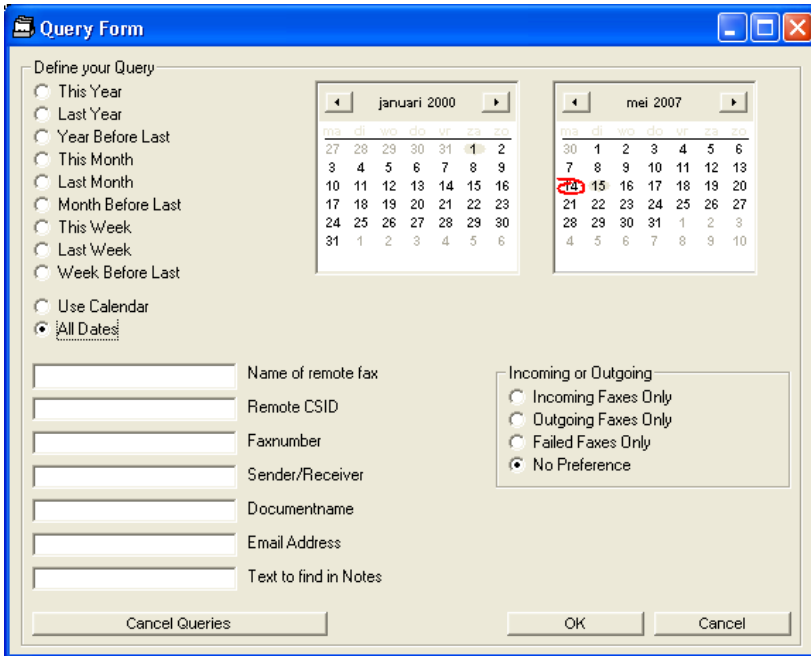
Date Range: To define your query you can select a predefined date range, or you can set a start en end date with the two calendars.

Fax Properties: Below the predefined date ranges a range of fax properties can be entered to further narrow down your query. These properties include the name of the remote fax, remote CSID, fax number, sender/receiver, document name, E-mail address and text in your notes.

Furthermore your query can be limited to received or sent faxes. In this section one can also choose to select the failed faxes.

- Click **OK** to execute the query.

To clear the query press **Cancel Queries**.
To cancel press **Cancel**.

6.23 History of Fax Server database updates

When the database is updated the new records are added. The Fax Server Access System application keeps a history of all the records that have been downloaded from each separate Fax Server in order to be able to add the new faxes only.

In some situations it can be useful to update the database with faxes from a certain date onwards. The Fax Server Access System has that option and it works as follows:

- Select **Options** in the menu.

- Select the Link to Fax Servers tab.
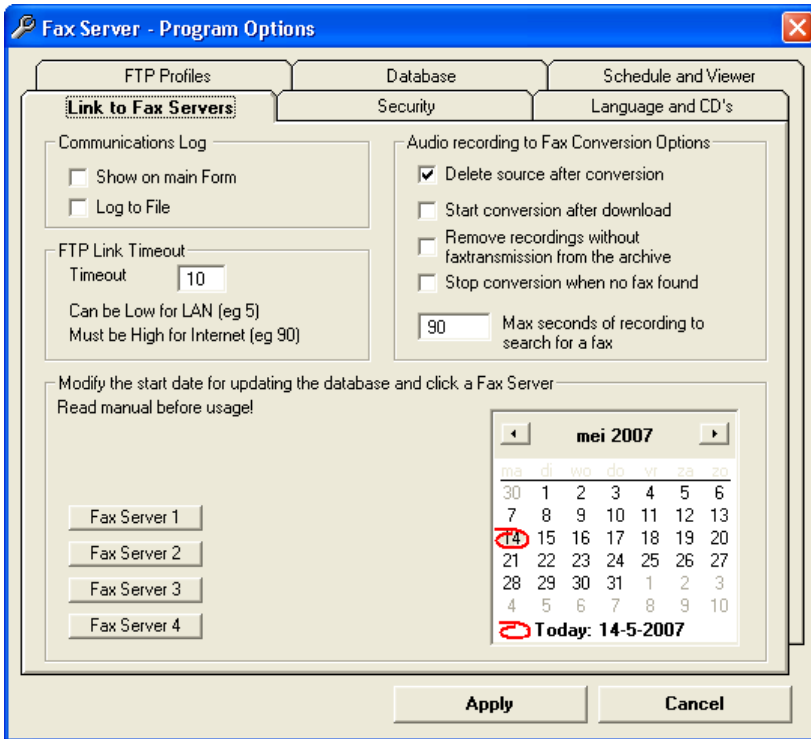
- Select the start date in the calendar to the right.

- Click the button of the selected Fax Server to the left.

- You will be prompted with a dialogue requesting confirmation.

- Once the history of a Fax Server is cleared the next "Update Database" will retrieve the database of the Fax Server from the selected date onwards.

- The function is very useful if you want to start a new archive that contains faxes from a certain date onwards. If you use it with an existing archive, it will cause double entries in the database of your Fax Server Access System. **Therefore use this option with care!**

6.24 Fax Server Program Options

The Options dialogue holds six tab pages with the following subjects:

- **FTP Profiles** contains the network settings for the Fax Servers.

- **Database** holds the column properties of the database grid

- **Schedule and Viewer** controls the printer and start-up options and the unattended download operation.

- **Link to Fax Servers** controls Fax Server history, FTP log and timeout and Fax Conversion settings

- **Security** contains the password protection ability

- **Language and CD's** has the language setting and CD archive options.

The tab pages are described in the following paragraphs.

6.24.1   FTP Profiles

The properties of four different Fax Servers can be entered here. Enter the properties of the Fax Server in the fields of **Profile Fax Server 1**.

- **IP Name or IP Address** is the IP Name or number of the Fax Server that you want to connect to.

- **FTP User** and **FTP Password** are the username and password of your login as they were given to you by the system administrator. The properties of your user account determine which faxes on the Fax Server can and cannot be viewed by the user.

- **ID** is the factory set ID of the Fax Server and cannot be changed. This ID is automatically displayed after a connection with the Fax Server has been established.

- **Port #** is the FTP server port through which the connection is to be made. The FTP server port of the Fax Server is default set to 21. Do not change the **Port #** when this value is not explicitly changed in the Fax Server.

- **Allow access to Fax Server** allows the application to access the Fax Server database. Check if a connection is needed, uncheck if a connection is not desired.

6.24.2   Database
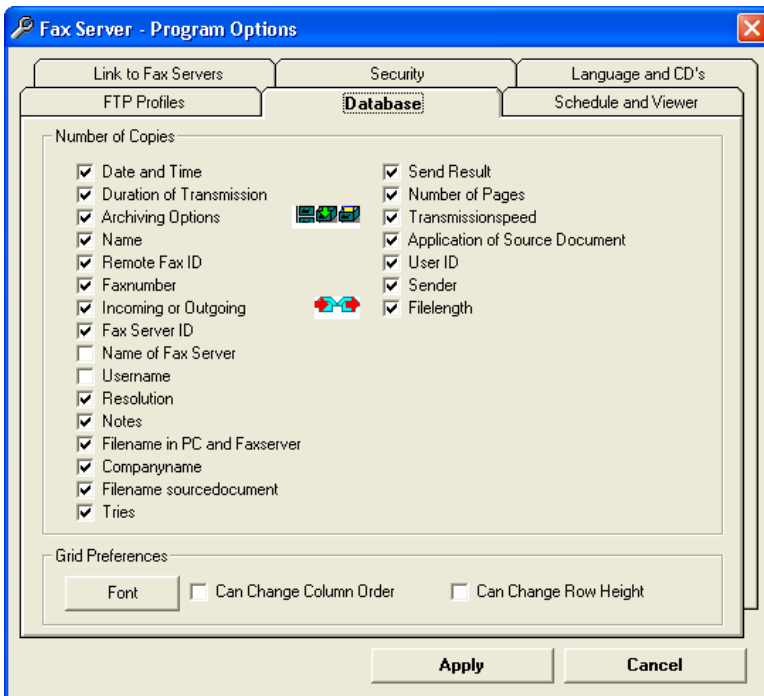
The **columns** as displayed in the main archive can be made visible or removed from the display. Column and row height can be adjusted.

- Check or uncheck the various column checkboxes to display or remove the column from the display

- Click **Font** to change the font settings of the main dialogue .

- Check **Can Change Column Order** to enable dragging the columns to a different location.

- Check **Can Change Row height** to enable adjusting the row height.

6.24.3 Schedule and Viewer
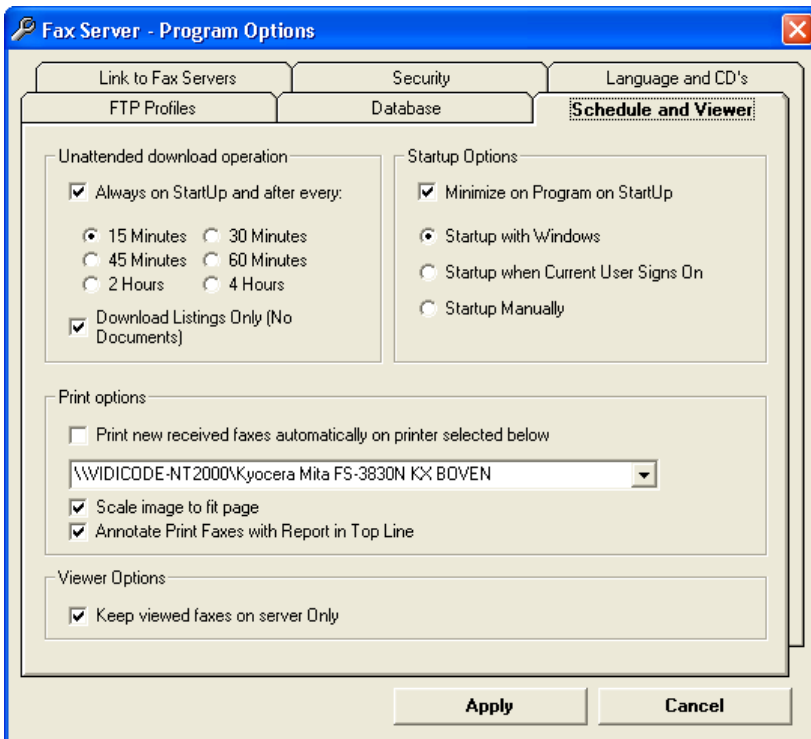
The Unattended download operation is meant to have the software check the Fax Server for new received faxes.
Check "Unattended download" and select a comfortable time interval.
The Download listings Only should be checked to leave all the faxes on the Fax Server only. In this case the fax data will not be downloaded to the PC.

Check "Minimize on Program on Start-up" to have the Fax Server Access System started minimized in the taskbar.
Select one of the start-up options below. Select Start-up Manually when you want to start the application as usual.

In the Printer Options you can select a printer to print the faxes on. Check "Scale Image to fit Page" to scale the image. Check "Annotate Print Faxes with Report in top line" to have a Fax report printed on top op the fax page.

Check "Keep viewed faxes on the Server only" to prevent the software from storing the fax data on the PC.

6.24.4 Link to Fax Servers
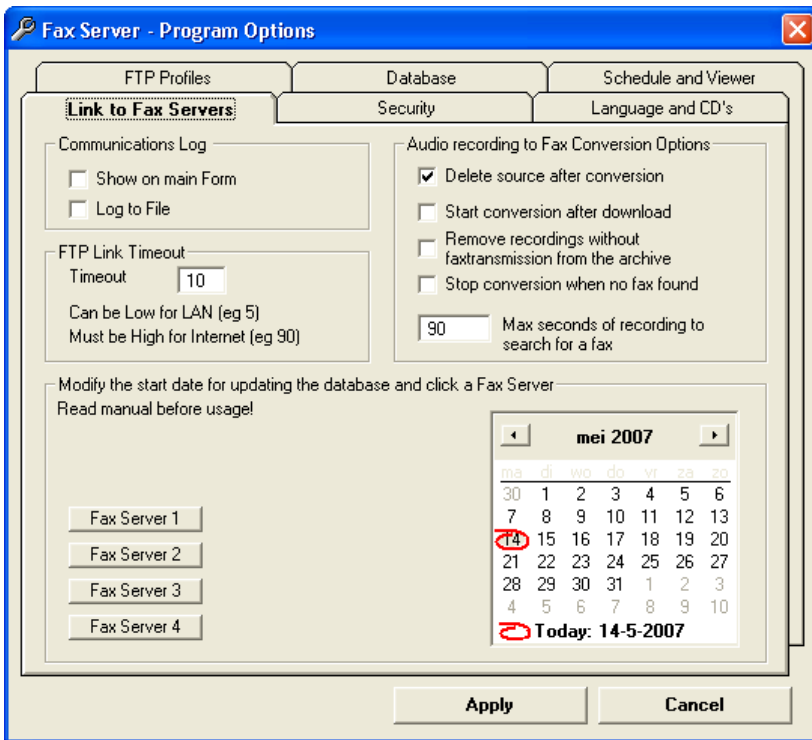
The Archive application can keep a record of the FTP communication that takes place with the Fax Servers in a log file. View the FTP communication in the main dialogue as follows.

- Check the **Log to File** checkbox to save the FTP communication to file

The log file of the FTP communication is called FTP.log and is saved in the program folder.

The **FTP Link Timeout** is the maximum time the Archive application will wait for a connection to a Fax Server to be established before announcing an error. A usual setting for a Fax Server connection over LAN might be 10 -15 seconds. For an Internet connection the timeout could be set to typically 90 seconds. Change the FTP Link Timeout as suitable for the connection.
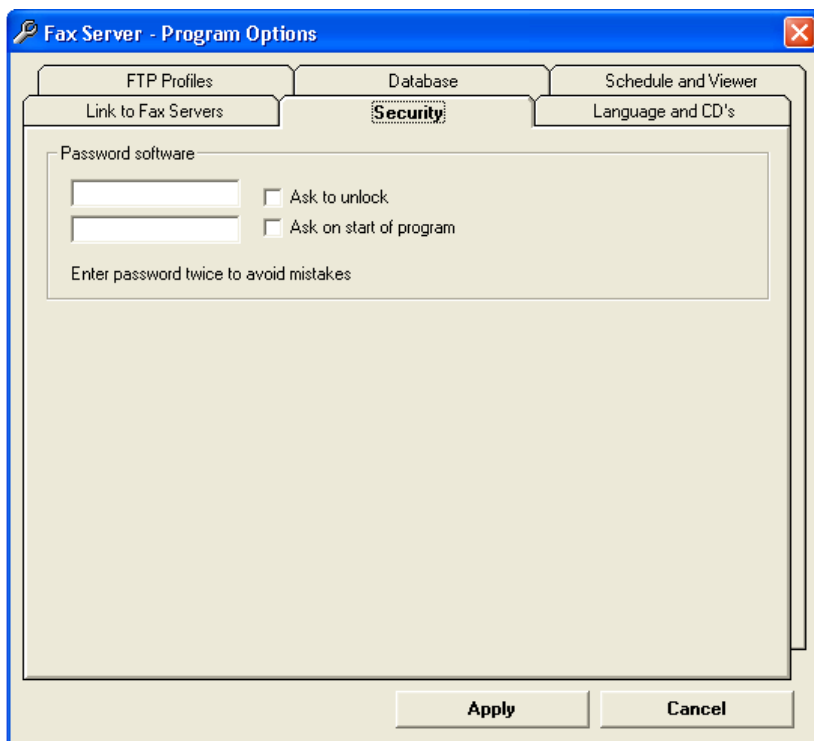
- To the right the tab **Audio recording to Fax Conversion Options** can be found. The following settings can be made here:

- **Delete source after conversion** removes the audio recordings from the database after the recording has been converted successfully.

- **Start conversion after download** will start converting all the downloaded recordings after each automatic database update.

- **Remove recordings without fax transmission from the archive** will remove recordings that failed to convert to a fax image.

- **Stop conversion when no fax found** will stop conversion of a recording after the set duration to look for a fax transmission in a recording. See next item.

- **Max seconds of recording to search for a fax** sets the duration for the converter to look for a fax in a recording. Standard this duration is set to 90 seconds. This setting can be useful when for instance a telephone answering machine/fax machine combination is being used. The answering from the answering machine may delay the start of the fax transmission which can be a reason to increase the duration. Also the number of rings before answering may delay the fax transmission significantly.

The reset history feature for updating the database is described in § 6.23.
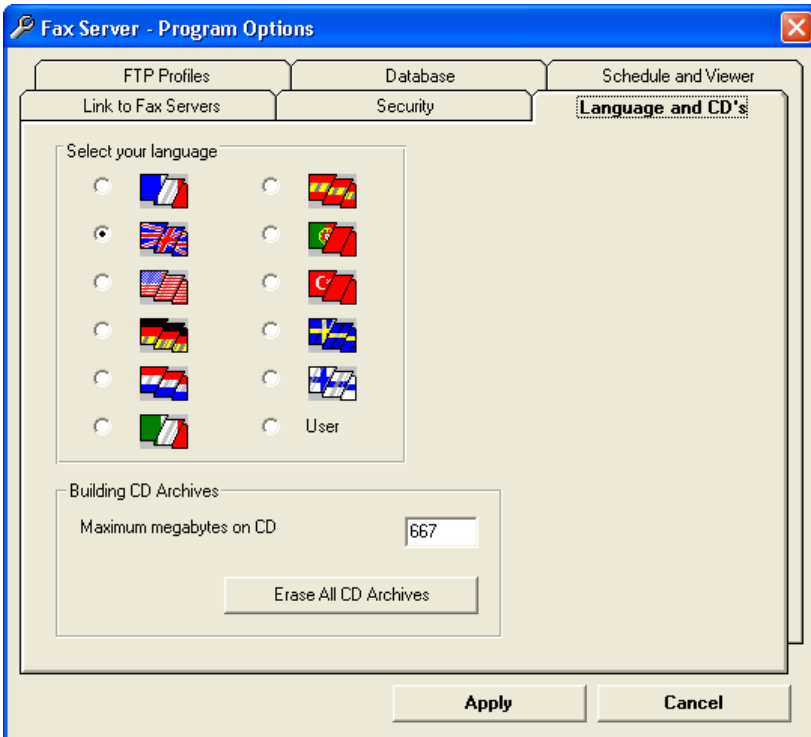
6.24.5   Security

The application can be protected with a password.

- Select the **Security** tab

- Enter the desired password in the two fields

- Check **Ask to unlock** to enable the password protection

- Check **Ask on start of program** to have the program start locked

- When the program is locked all the vital program functions are blocked. The **lock** tool button is used to lock and unlock the program. When locked the button is red. When unlocked the button is white.

Fax Server - Program Options

| FTP Profiles | Database | Schedule and Viewer |

| Link to Fax Servers | Security | Language and CD's |

Password software

Ask to unlock

Ask on start of program

Enter password twice to avoid mistakes

Apply   Cancel

6.24.6   Language and CD's

The **language** of the application can be selected.

- Select **Options** in the menu

- Select the **Language** tab

- Select the preferred language

- Building CD Archives sets the maximum size of the CD folder to be made.
  Maximum megabytes on CD sets the limit to the size of the CD Archives.
  This value is default set to 667Mb.

6.25 Software updates

SendFax and Fax Server Access System can be updated from the Vidicode website.

Choose **Information** in the main menu and select **"On line product update"**

A new dialogue opens where the current version is displayed.

Click on the "**Check for updates**" button to check for updates.
The program will check on the Vidicode website for updates of the program.
If there are updates they will be displayed.

- Click "**Execute Update**" to execute the update.

Note: The file that is downloaded is a zipped file that is unpacked by the application itself. Update files are approximately 1 Mb in size.
Updates can not be executed while the program is performing other tasks.
An open internet connection is required for this operation

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