

Administrator Guide

October 28, 2022

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Disclaimers

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Support

FaxCore customers are encouraged to purchase a FaxCore Support Contract which provides them with unlimited telephone, email and online product support (Zendesk), Monday thru Friday, 7:00 AM to 6:00 PM Mountain Time (GMT -7). FaxCore Partners can also provide on-site support and training when needed. FaxCore Support Contract holders are entitled to all FaxCore product service packs and upgrades at no additional charge.

Web Support: <u>https://faxcore.zendesk.com/</u> The site contains technical information as well as a list of frequently asked questions.

Email Support: Email support is available at support@faxcore.com

Phone Support: FaxCore support technicians can be reached at +1 (720) 870-2900, option 2.

Asia Pacific

Email Support: Email support is available at support: Email support is available at support@faxcore.com.myPhone Support: FaxCore support technicians can be reached at +60 (3) 3324 3226

Introduction

Components

The FaxCore Evolution eV6 fax server consists of the following modules and components.

FaxCore IIS web component (FaxCore Web Client & Admin Panel)

FaxCore web client allow users to view, send, forward, retrieve, search and print faxes from any compatible Web browser. Also includes admin panel for administrator to manage the fax server.

FaxCore Render Agent (Document Rendering Engine)

This is the document conversion engine that renders native documents to faxable format (TIFF) and submits documents to the fax board.

FaxCore FaxAgent (Fax board & FOIP Drivers)

This service/component handles fax requests from and to FaxCore fax server and acts as the agent between FaxCore fax services and the fax board.

FaxCore SMTP Listener (Email to Fax integration)

This service/component handles and parses email messages sent from any SMTP-enabled email servers to be sent as faxes through FaxCore.

FaxCore File Gateways (Embedded Codes & Control File Integration)

Enable backend applications such as ERP, CRM & AS/400 to drop faxes into network folders/FTP with embedded fax information which is monitored by the file gateway service.

FaxCore Database (Microsoft SQL Engine)

Stores transactional records and information of all incoming/outgoing faxes, users, domain, and system information.

FaxCore Web Services/SOAP SDK

Allow third-party applications to integrate FaxCore functionalities through a set of comprehensive APIs.

Available Versions

FaxCore Evolution eV6 is available in the following versions:

FaxCore Evolution eV6 Small Medium Enterprise (SME) / Integration Server (FIS) Edition

- Includes a single server license with two (2) fax lines
- Supports up to fifty (50) user licenses and four (4) fax channels
- FaxCore Web Client
- FaxCore IP Fax Printer Driver
- FaxCore REST API
- Microsoft Exchange, Office 365 & SMTP Email Integration
- Microsoft SQL 2019 Express Edition or greater

FaxCore Evolution EV6 Standard Edition

- Includes single server license with two (2) fax line licenses.
- Supports unlimited users and up to eight (8) fax channels
- FaxCore Web Client
- FaxCore IP Fax Printer Driver.
- FaxCore REST API
- Microsoft Exchange, Office 365 & SMTP Email Integration.
- Microsoft SQL 2019 Express Edition or greater

FaxCore Evolution EV6 Enterprise Edition

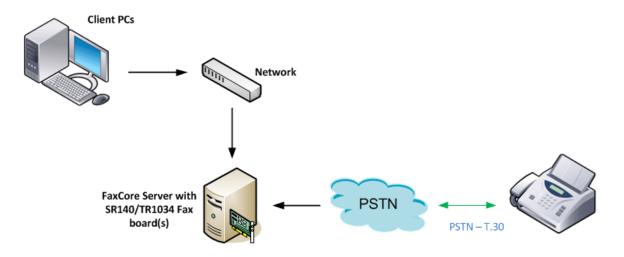
- Includes single server license with two (2) fax line licenses.
- Supports unlimited users and fax channels
- FaxCore Web Client
- FaxCore IP Fax Printer Driver.
- FaxCore Web Services SDK
- Microsoft Exchange, Office 365 & SMTP Email Integration.
- Microsoft SQL 2019 Express Edition or greater

FaxCore Evolution EV6 Add-On Modules (applicable to all editions)

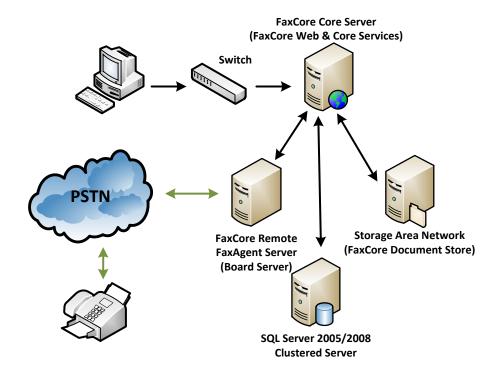
- Barcode Module
- MFP Connectors (HP-SMTP, Sharp, Xerox-SMTP, Konica Minolta, eCopy)
- File Gateway
- Epic Print Services (EPS) integration
- SAP Connector

FaxCore Network Architecture

FaxCore Stand-Alone Installation



FaxCore N-Tier/Multi-Server Architecture



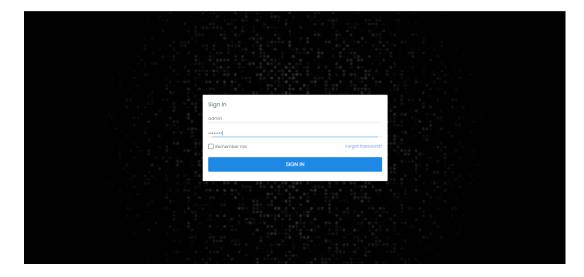
Initial Steps after Installation

Initial Admin Login

After FaxCore has been installed, you should log in as the administrator.

- 1. Open your Web browser and go to the URL http://<fax server name>/admin, where <fax server name> is the server where FaxCore was installed.
- 2. The login screen displays. Log in using the initial default credentials.

Login: **admin** Password: **password**



- 3. Click Login.
- 4. The admin panel displays. You should now change the admin password from the default value. For information about changing a user's data, see the chapter titled "Modifying Users" starting on page 43.

Setting up FaxCore

Before FaxCore users can begin sending or receiving faxes, you must perform the following tasks:

- Create domains (Optional).
 For more information, see the chapter titled "FaxCore Domains" starting on page 27.
- Create users.
 For detailed instructions, see the chapter titled "Creating Users" starting on page 29.
- Configure Fax board properties. For detailed instructions, see the chapter titled "Connecting and Configuring Fax Lines/Boards" starting on page 11.
- Create inbound routes.
 For detailed instructions, see the chapter titled "Routing Inbound Faxes to Users" on page 49

Connecting and Configuring Fax Lines/Boards

Configuring Fax Ports to Send and Receive Transmissions

1. Navigate to the **Network Settings > Fax Agent > Ports** tab. This section allows management of the available fax ports for the selected fax agent. Here you can enable the port capabilities.

| SYSTEM | ~ | | | | | | | 🌲 🌲 |
|---|--------|---------------------------|-----------------|---------------|-----------------------------------|-------------------|---------------------|-------------|
| | < | Network Settings > FaxAge | nt | | | | FC-DE1-EV601 (10000 | 1) v Remove |
| | < | Configuration Port | s Dialing Rules | Agent Monitor | Ports Group License Ports Agent G | froup | | |
| | nent < | FaxAgent Utilization | : 0 % | C | | Sec | arch | ٩ |
| | | MODULE | PORT | ENABLED | SEND ENABLED | ✓ RECEIVE ENABLED | TONE DETECT ENABLED | |
| Network Settings | × | <u>M0,0</u> | 0 | 0 | ✓ | v | | |
| u Agent ssage Queue ssage Schedule | | <u>M0,1</u> | 1 | Ø | V | v | | |
| | < | | | | | | | |
| | < | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

2. To access individual port configuration, click the port number to **Edit**. The **Edit Port Configuration** dialog box will display.

| Edit Entry | | |
|-----------------------------|------------------------------------|--|
| Port 0 Configuration | | |
| * Answer Ring : | 3 | |
| * Dial Timeout (sec) : | 60 | |
| Local CSID : | FAXCORE | |
| * Tone Detect Digits : | 4 | |
| * Tone Wait Timeout (sec) : | 5 | |
| Greeting Type : | Tone v | |
| Greeting Wave File : | Not Applicable | |
| Header Style : | Default | |
| Custom Fax Header : | Not Applicable | |
| | Save Save All Save And Close Reset | |

3. **Greeting Type** can be **None**, **Tone**, or **WavFile**. You can choose **WavFile** if the fax board is a TR1034, which supports that option (this option should only be configured if you have DTMF/Tone detection enabled)

None – Fax call is answered without any greetings.

Tone - Provide the sender a Bong when the fax call is answered.

WavFile – Plays a wav file from a location stored on the server when the fax call is answered.

4. Make any desired changes and click **Apply** or **Apply All** to save these settings for the port.

For more information about other settings on this page refer the section FaxAgent - Configurations to page 23

Configuring Dialing Rules

The dialing rules section lets you set prefixes and suffixes for international and domestic dialing as well as dial replacement strings. These dialing rules are only applicable to Fax address types and not Raw Fax address types.

To access this section, navigate to **Network Settings > Fax Agent > Dialing Rules** tab.

| = 📑 system 🗸 | | | | | 🌲 🎒 🥹 |
|-----------------------------------|--|-------------------------------------|-----------------------------|--------------|-------------------|
| 🚱 Global Settings 🛛 < | Network Settings > FaxAgent | | | FC-DEI-EV601 | (100001) V Remove |
| 🛱 Domain Settings 🤇 | Configuration Ports Dialing Rules Agen | t Monitor Ports Group License Ports | Agent Group | | |
| म्मू Domain Management < | Dialing Prefix/Suffix | | | | BC |
| 😵 Network Settings 🗸 🗸 | International Dial Prefix : | | International Dial Suffix : | | |
| FaxAgent Message Queue | Domestic Dial Prefix : | 1 | Domestic Dial Suffix : | | |
| Message Queue Message Schedule | Custom Dial Prefix : | | Custom Dial Suffix : | | |
| I Utilities < | Raw Dial Prefix : | | Raw Dial Suffix : | | |
| 🚯 Help & Support 🧹 | Now 8 C 🛓 🕹 | | Search | | ٩ |
| | SEQ | DIAL STRING | REPLACE WITH | APPEND WITH | ACTIVE |
| | <!--</th--><th>page</th><th>No records available.</th><th></th><th>No record found</th> | page | No records available. | | No record found |

- International Dial Prefix/Suffix Appends/Prepend an international Dial Prefix when FaxCore detects a Country code other than the one specified on the Configuration Tab.
- **Domestic Dial Prefix/Suffix** Appends/Prepend a domestic Dial Prefix when FaxCore detects an area code other than the one specified on the Configuration Tab.
- Raw Dial Prefix/Suffix This refers to raw fax, which bypasses the dial rules except for the Raw Dial Prefix/Suffix fields.

Example 1:

| Delivery | FAX | | • |] |
|----------|------|---|----------|---|
| Fax # | + 60 | 3 | 33249226 | |

Country Code on Configuration tab: 1

International Dial Prefix: 011

FaxCore Dial String: 01160333249226

Explanation: FaxCore detects a different Country Code is being dialed and treats this as an international call

14

Example 2:

| Delivery Type | |
|-------------------------------------|---|
| Fax | ~ |
| * Fax Number (Format: +12345678990) | |
| +13038774141 | |

Area Code on Configuration tab: 303

Domestic Dial Prefix: 1

FaxCore Dial String: 8774141

Explanation: FaxCore detects the same Area Code & Country Code, hence does not appends the dial string with "1" and remove the Area Code from the dial string

Example 3:

| Delivery | FAX | | | - |
|----------|-----|-----|---------|---|
| Fax # | + 1 | 732 | 5550015 | |

Area Code on Configuration tab: 720

Domestic Dial Prefix: 1

FaxCore Dial String: 17325550015

Explanation: FaxCore detects a different Area Code is being dialed and treats this as a long distance call.

• **Custom Dialing Rules** - Custom Dialing Rules allow you to further manipulate the dial string by replacing or appending numbers to the dial string.

Example 1:

| New B C 1 | | | | | | Search | | م |
|-----------|---|---|-----|-----|-------------|--------------|-------------|--------|
| | | | | SEQ | DIAL STRING | REPLACE WITH | APPEND WITH | ACTIVE |
| | • | • | t↓. | 1 | 1720 | 720 | | * |
| | | | | | | | | |

Dial String: Replace With: Actual Dial String: Final FaxCore Dial String:

Example 2:

| New 8 C 🛦 📩 | | | | | | Search | | | ۹ | |
|-------------|---|---|---|----------------|-----|-------------|--------------|-------------|----------|---|
| | | | | | SEQ | DIAL STRING | REPLACE WITH | APPEND WITH | ACTIVE | |
| | 1 | • | + | t ₄ | 1 | 1720 | | 5555 | √ | - |

Dial String: **1303** Append With: **,,,,5555** Actual Dial String: **13038704141** Final FaxCore Dial String: **13038704141,,,,5555**

Note: For SR140 and Etherfax systems, never use "," (comma) or "w"(wait for Dial Tone) in the dialing rules.

Raw Fax Dialing Rules

What we have discussed so far about Dialing Rules only applies to Fax addresses. These dialing rules do not apply to Raw Fax addresses. Raw Fax dialing rules are managed on the Domain Settings and are disabled by default.

Managing Raw Fax Dial Rules

- 1. Navigate to **Domain Settings > Fax Settings**
- 2. Scroll to the Dialing Rules section; change the Raw Fax Dial Rule to "Enabled" and click "Save" and "Apply All", then click on "**Manage Custom Dial Rules**".

| SYSTEM | 🗏 🔝 экты 🗸 🖕 🕘 | | | | | | | | |
|--|--------------------------------|--------------------------------|-------------------------------------|--|--|--|--|--|--|
| 🚱 Global Settings 🛛 🔇 | Domain Settings > Fax Settings | | Save Apply Al Keep Al Local Setting | | | | | | |
| O ⁶ Domain Settings v | Dialing Rules | | A | | | | | | |
| Domain Settings | * Country Code : | 1 | | | | | | | |
| User Permission | Area Code : | | | | | | | | |
| Directory Sync | Dial Prefix : | | | | | | | | |
| SMTP Relay Settings | Dial Prefix Rule : | Use agent configuration only | | | | | | | |
| Tracking Config Tracking Dictionary | Dial Suffix : | | | | | | | | |
| Black List Subscription | Dial Suffix Rule : | Use agent configuration only v | | | | | | | |
| 🖶 Domain Management 🤇 | Row Fox Diat Rule : | Enabled (before agent config) | | | | | | | |
| | | 21 Manage Custom Dial Rules | | | | | | | |
| 🖗 Network Settings 🤇 | Fax Send Setting | | | | | | | | |
| III Utilities 🗸 | Local CSID : | FAXCORE | | | | | | | |
| 🚯 Help & Support 🛛 🧹 | Local Caller ID : | | | | | | | | |
| | Default Fax Format : | fax v | | | | | | | |
| | Email Notification Format : | with attachment v | | | | | | | |
| | Email Attachment Max Size : | autore a | n 📕 | | | | | | |

3. On the new window, enter the dial string to manipulate and choose whether to "Append with" or "Replace with" the dial string with a value. When done, click on "**Save And Close**".

| New | e c | ± ± | | | | Search | | | ٩ |
|-----|-----|-----|---|-----|------------|--------------|-------------|----------|---|
| | | | | SEQ | DIALSTRING | REPLACE WITH | APPEND WITH | ACTIVE | |
| | 1 | + | 1 | 1 | 1720 | 720 | | v | * |
| | 1 | ÷ | 4 | 2 | 1720 | | 1234 | ✓ | |
| | | | | | | | | | |
| | | | | | | | | | |

Example 1:

1303 Replace with 303 Raw Fax Number: 13038704141 Actual Dialed Number: 3038704141

Example 2: 1888 Append with 1234 Raw Fax Number: 18885554444 Actual Dialed Number: 188855544441234

Note: The Raw Fax Dial Rules are managed per-domain; however child domains can inherit the parent domain's Raw Fax Dial Rule by checking the "**Inherit Domain Rules**" option.

Example: Raw Fax Dialing Rules is enabled and configured on SYSTEM domain. Administrator can go into each child domain underneath SYSTEM domain to enable Raw Fax Dialing Rule and check the **"Inherit Domain Rules"** option to inherit the Raw Fax Dial Rule for the child domains.

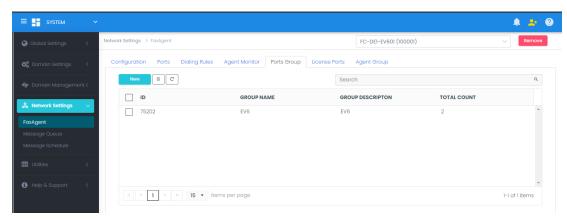
Configuring Port Grouping for Outbound Transmissions

FaxCore lets you group available send ports for outbound faxes. This feature is useful when there are certain department/domain users that require a dedicated number of ports to send faxes.

For example, your FaxCore server has 4 ports available for sending and you want to dedicate 3 of the 4 available ports for users in Domain A. You can do so by grouping Ports 0, 1, and 2 into a port group and define an outbound rule for Domain A to use the port group to send faxes.

Create New Port Group

- 1. Navigate to the **Network Settings > Fax Agent > Ports Group** tab.
- 2. Enter a name and description for the new group and use the >> and << buttons to add or remove which of the currently unassigned ports belong to the new group.
- 3. Click Save to complete creation of the group.



Change Existing Port Group

Existing port groups are listed at the bottom of the Ports Group page.

Click the trash can icon to delete an existing group.

Click the port to edit an existing group. This populates the **Group Name** and **Group Description** fields and the **Group Ports** box. You can now make appropriate changes and then click **Save** to save changes to the group.

Setting Up Outbound Routing Rules

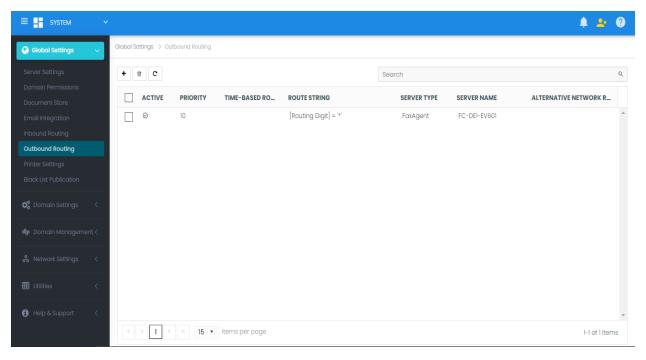
In order for faxes to be sent from FaxCore Evolution EV6, at least one outbound routing rule must exist for each FaxCore server. By default, FaxCore automatically creates the first Outbound Routing rule when a FaxAgent is registered that has a wildcard "*" rule that will use the FaxAgent to send all outbound faxes.

The outbound routes define which port groups or fax agent to use to send outbound faxes. Outbound routes can be configured for each domain and for individual users and can be based on dial string (digits). In addition, you can define group ports on each fax agent to dedicate those ports to be used by certain domain(s), user(s) or dial string (digits).

Outbound routes based on dial string are particularly useful for Least Cost Routing purposes.

To set up an outbound route for a domain, follow these steps:

- 1. Navigate to Global Settings > Outbound Routing.
- 2. Existing outbound routes are displayed. Note that you can edit or delete an existing outbound route on this screen.



- 3. To create a new outbound route, click "+".
- 4. The Outbound Routing Rule dialog box displays.

| lobal Settings > Outbound Routing > Edit Entry | | Save Reset Back |
|--|--|-----------------|
| Dutbound Routing Rule | | |
| * Conditions : | Domain v SYSTEM v AND v | |
| | Routing Digits V | |
| * Route String : | [Routing Digit] = '*' | |
| | | |
| Route Type : | | |
| Fax Agent : | FaxAgent v | |
| Assign Method : | PC-DEI-EV601 (100001) | |
| Port No : | Port v | |
| Activate Route : | · · · · · · · · · · · · · · · · · · · | |
| * Priority : | Yes No | |
| | 10 * higher number is higher priority. (1-9999) | |
| Route by time-based : | No | |
| Override Message's Priority : | Disabled | |
| | Z Click to Manage Alternative Network Routing | |

5. After filling in the fields (see below for descriptions and explanations), click **Save** to save the setting for the new outbound route.

Conditions

Use the dropdowns to specify whether you want to configure the new outbound route for entire domain(s), routing digits, individual user(s), or a combination by using the provided **AND & OR** relationship operators.

If you select **Domain** in the left-hand dropdown, then all available domains are listed as a dropdown in the right-hand box.

If you select **Routing Digits** in the dropdown, then the right-hand box becomes a text input box in which you can enter the desired digits. Use this to make that number use the specified agent. You can use * as a wildcard – e.g., specifying 1734* as the routing digits would force any outbound fax to Area Code 734 to use the agent.

If you select **User** in the left-hand dropdown, then click the right-hand box, a dialog box appears that lets you select a FaxCore user.

|) Global Settings | Clobal Settings > Outbound Routing > Edit Entry User Selection | | Save Reset Back |
|-------------------|--|--------|------------------|
| | SYSTEM | Search | ٩ |
| | ✓ SYSTEM | | |
| | Bruce Domain | | |
| | Connectis | | |
| | DougsTest | | |
| | > — | | |
| | | | |
| | FAXCORE AD | • | |
| | System Admin (FAXADMIN) | | |
| | System-Mailer (SYS-MAILER) | | |
| | System-Receive (SYS-RECEIVE) | | |
| | System-Stress (SYS-STRESS) | | |
| | System-Test (SYS-TEST) | | |
| | System-Unrouted (SYS-UNROUTED) | | |
| | Todd Boatwright (TBOATWRIGHT) | | |
| | Tom Linhard (TLINHARD) | | |
| | H (1) H 200 V items per page | | 1-33 of 33 items |

Click the desired username and it appears in the box.

After completing the selection, click **Set** and the outbound route token string is automatically inserted in the text box. An example is shown in the screen shot above.

Route Type

This is a dropdown with two options, **Fax Agent** and **Fax Server**. If you select **Fax Agent**, the next field, **Server IP** is automatically populated. If you select **Fax Server**, you have to populate the **Server IP** field manually.

Note: Currently, only the **Fax Agent** option is implemented.

Assign Method

The route can be assigned to a port or a port group.

If you select **Port**, then the next field becomes **Port No** and is a dropdown populated with the available ports. In the **Port No** dropdown, you can also select * to use any available port. The * option is the default.

If you select **Port Group**, then the next field becomes **Group** and is a dropdown populated with the available port groups.

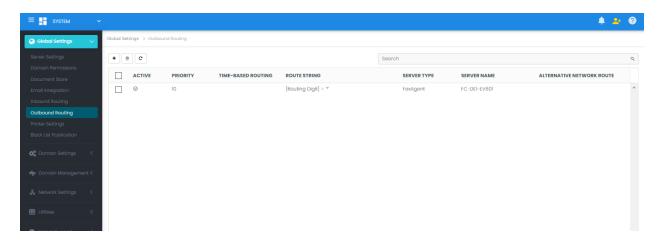
Priority

Enter a number higher than the default value of 100 to ensure that this rule is processed. If you have an existing route, you will want to increase the priority you are creating so that it takes precedence over the existing route, the higher the number, the higher the priority. (1-9999)

Change Existing Outbound Routing Rule

Navigate to Global Settings > Outbound Routing.

Existing outbound routing rules are listed on this page. You can click the **Bin** icon to delete a rule or click the rule to edit the rule. If you click the rule, the **Outbound Routing Rule** dialog box (see below) displays.



Fax Agent

Introduction

This chapter describes the requirement and configuration guidelines for FaxCore Evolution EV6 fax agent services.

Prerequisite information: Consult your service provider/PBX vendor beforehand for necessary dialing rules for International, Domestic & Local calls.

Service Registration

Upon installation, FaxCore registers the initial FaxAgent automatically. FaxAgent registration is only required if you are installing a 2nd FaxAgent server or re-registering an existing FaxAgent due to change of server name, major version upgrade of Dialogic Brooktrout drivers or board module change.

To register the service, follow these steps (remember to back up the configuration file before making any changes):

- Edit the fax agent configuration file located within the FaxCore installation directory e.g., C:\FaxCore\svc.faxagent\FaxAgent.exe.config – with your favorite text editor or Notepad.
- 2. Locate the subsection

<appSettings> ... </appSettings>

Set the value key Server to the name of your FaxCore server. If FaxCore is installed on the local server – the same server where the service is running – leave the value as localhost.

3. If you're registering the FaxCore server as a Remote Fax Agent, enter the FaxCore server IP address or FQDN as the value.

Example:

<add key="Server" value="YourFaxCoreServerName">

4. Locate the subsection

<applicationSettings>

</applicationSettings>

Set the Web Services URL path to the name of your FaxCore server - e.g.,

http:// YourFaxCoreServerName:2372/WebServices/wfFaxAgent.asmx

If FaxCore server is installed on the local server – i.e., the same server where the service is
running – leave the value as the default:
http://localhost:2372/WebServices/wfFaxAgent.asmx

5. When completed, save the document. Start the service and use the Windows Services Management Console to change the FXC6.FaxAgent service startup type from Manual to Automatic.

When initialized, the FXC6.FaxAgent service maps and registers the host server's IP address and name into an agent pool with an associated identifier number.

Note: When either the IP address or hostname changes on the Fax Agent/Fax Board host server, the Fax Agent must be removed from the FaxCore Admin Panel > Network
 Settings > Fax Agent page and reregistered to capture these changes. The corresponding outbound routing rule must also be recreated to associate with the updated identifier number

Service Reregistration

Note: Re-registration of FaxAgent is only required if there is a change in port/channel numbers or module of the fax board. If the faxagent.exe.config is over-written by accident/unintentionally, simply populate the agent ID in the new faxagent.exe.config and restart the FXC6.FaxAgent service.

When re-registration of the FaxAgent is necessary , follow these steps:

- Navigate to Network Settings > Fax Agent > Configuration and DELETE the required fax agent by selecting from the drop down list. Then stop the FXC6.FaxAgent service on the host server of the deleted agent.
- Edit the fax agent configuration file located within the FaxCore installation directory e.g., C:\FaxCore\svc.faxagent\FaxAgent.exe.config – with your favorite text editor or Notepad. (remember to back up the configuration file before making any changes)
- 3. Locate the subsection

<appSettings> ... </appSettings>

Remove the numerical value from the Agent ID key.

Example:

<add key="AgentID" value="" />

4. When completed, save the document and start the FXC6.FaxAgent service to automatically reregister itself into the agent pool together with a new identifier number.

Configurations

Append a description to your fax agent by navigating to Network Settings > Fax Agent >
Configuration and selecting the desired fax agent from the dropdown list at the top of the screen.
Populate the corresponding Fax Agent Label field.

| = 📑 System 🗸 | | | 🌲 🔺 📀 |
|------------------------|---|---|------------------------------|
| 🥥 Global Settings 🛛 < | Network Settings > FaxAgent | FC | -DE1-EV601 (100001) V Remove |
| 🗱 Domain Settings 🤇 | Configuration Ports Dialing Rules Agent Monitor Por | ts Group License Ports Agent Group | |
| 🖶 Domain Management < | Agent Information | | |
| 🛞 Network Settings 🗸 🗸 | Server Name : | FC-DEI-EV601 | |
| FaxAgent | * Server IP : | 10.10.10] | |
| Message Queue | Label : | | |
| Message Schedule | Driver Information | | |
| Utilities < | Fax Driver : | EtherFax | |
| 🕄 Help & Support 🧹 | Service Path : | C:\Windows\TEMP\FaxCore.Server | |
| | FaxAgent Host API ID : | C43AD-86A1-4D10-A232-254A628B6338 | |
| | Country Code : | 1 | |
| | Area Code : | | |
| | Current Status : | Running | |
| | Total Fax Ports : | 2 | |
| | Fax Pooling | | |
| | Fax Number Pooling : | Pool outgoing faxes to the same destination to a predefined port/channel. | • |
| | | | |

- 2. Populate the country and area code of the region and click the **Save** button to store and apply the changes. These refer to the location where the fax agent resides.
- 3. Enable "**Pool outgoing faxes to the same destination to a predefined port**" if you want all outbound faxes that are going to the same fax number to send through the same port to avoid multiple ports sending to the same number which might cause "Line Busy" errors.
- Upon completing the registration process, based on the telephony circuit setup, navigate to Network Setting > Fax Agent > Ports and activate the send and receive permissions for each fax channel accordingly.

| = system ~ | | | | | | | 🌲 🔺 🤇 |
|--------------------------|---------------------------|---------------|---------------|--------------------------------|-----------------|-----------------------|--------|
| 🥥 Global Settings 🔍 N | etwork Settings > FaxAgen | | | | | FC-DE1-EV601 (100001) | Remove |
| 😂 Domain Settings 🧹 | Configuration Ports | Dialing Rules | Agent Monitor | Ports Group License Ports Ager | nt Group | | |
| म्मू Domain Management < | FaxAgent Utilization : | 0 % | C | | Se | arch | ٩ |
| 🖧 Network Settings 🗸 🗸 | MODULE | PORT | ENABLED | SEND ENABLED | RECEIVE ENABLED | TONE DETECT ENABLED | |
| ofo Network Settings V | <u>M0.0</u> | 0 | \otimes | V | Z | | |
| FaxAgent | <u>M01</u> | 1 | 0 | ✓ | V | | |
| Message Queue | | | | | | | |
| Message Schedule | | | | | | | |
| I Utilities < | | | | | | | |
| | | | | | | | |
| 🕄 Help & Support 🛛 < | | | | | | | |

- 5. For analog fax boards that support capturing of dual-tone multi-frequency signals, activate the tone detect option to take advantage of dual-tone multi-frequency routing capabilities.
- 6. Edit other Port Configurations by clicking on the module link:

| Edit Entry | ж. |
|-----------------------------|------------------------------------|
| Port 0 Configuration | |
| * Answer Ring : | 3 |
| * Dial Timeout (sec) : | 60 |
| Local CSID : | FAXCORE |
| * Tone Detect Digits : | 4 |
| * Tone Wait Timeout (sec) : | 5 |
| Greeting Type : | Tone v |
| Greeting Wave File : | Not Applicable |
| Header Style : | Default |
| Custom Fax Header : | Not Applicable |
| | Save Save All Save And Close Reset |

| Parameter | Description |
|----------------------------|--|
| Answer Ring | Number of rings to allow before answering a fax call |
| Dial Timeout: | Allow in seconds before timing out an outbound fax |
| Local CSID | CSID to broadcast for the port (Domain & User settings overwrite the value here) |
| Tone Detect Digits | Number of digits to detect for DTMF collections |
| Tone Wait Timeout (sec) | Seconds to wait before timing out DTMF collections |
| Greeting Type | Plays a Tone, Wav or None when a fax call is answered |
| Greeting Wav File | If Wav is selected for Greeting Type, specify the location of the WAV file. |
| Header Style | Specify to use either the Default fax headers or Custom Fax headers. |

Working with Users and Domains

FaxCore Domains

Overview

FaxCore domain structure is similar to Active Directory where administrators can create a forest with a parent domain and child domains underneath.

User settings and configurations are inherited from the Domain Settings and then Domain Settings are inherited from the Global Settings. When working with users and domains it is important to understand which settings takes precedence over the other, User or Domain or Server? Below is the order of precedence for settings and configurations:

- User level
- Domain level
- Server level

User settings will always take precedence over settings even though they are initially inherited from the Domain Settings when created. Once created, Administrators can change the user settings to overwrite the Domain settings.

Creating a Domain (Optional)

- 1. This is an optional step because FaxCore has a default Domain (SYSTEM) which you can use to store users in.
- 2. Click the top left Domain navigate bar "System", the domain menu will pop up in new window.
- On the left, the existing domains are displayed as a hierarchy. Right-click on the name of a domain in the list to display the context menu and click the menu icon, select Create Domain to create a new child domain beneath the name you clicked on.

| E SYSTEM | , | | | ê 🛓 🙆 |
|----------------------|--------------------------------------|------------------------|--|-------|
| | Domain Management > Domain Info | | | Save |
| | Domain Info | | | |
| ⊕ Domain Management∨ | * Domain Name | 9: SYSTEM | | |
| Domain Info | Description | System Domain | | |
| | Date Creat Acti | System Panel | | |
| | User Summary | ✓ SYSTEM | + Create Domain | |
| | Total Use | Bruce Domain | Create Domain Delete Domain Ge Rename Domain | |
| | Synchronized Use | Connectis DougsTest | SK Move Domain | |
| | Non-synchronized Use | ~ EPIC | | |
| | User Summary Including Child Domains | Trillium v Exucom | | |
| | Synchronized Use | ~ Company A | • | |
| | Non-synchronized Users | s : 151 | | |
| | | | | |
| | | | | |
| | | | | |

Modifying or Deleting a Domain

- 1. Navigate to **Domain Management > Domain Info**.
- 2. On the left, the existing domains are displayed as a hierarchy. Click on the name of a domain in the list to display the context menu. You can delete the domain, rename it, or move it to another location in the hierarchy. Note that these three options are inactive (grayed) if you right-click on the System domain, because that is the root of the hierarchy and cannot be changed or moved.
- 3. A domain cannot be deleted if it has users in it.
- 4. If you choose the **Move Domain** option, a dialog box opens that lets you choose the new location in the hierarchy.

| System Panel | |
|------------------|---|
| ✓ SYSTEM | - |
| Bruce Domain | |
| ⊪) DougsTest 🗸 🗸 | |
| Connectis | |
| DougsTest | |
| ~ | |
| | |
| ~ | - |
| ~ | Ŧ |

Creating Users

There are three ways to create new users in FaxCore:

- Create a user manually
- Synchronize with a Microsoft Active Directory
- Import users from a file

Instructions for each of these are provided in the following sections.

Manually Create a User

To create a single new user manually, do the following:

- 1. Navigate to **Domain Management > Users**.
- 2. Click + A dialog box appears for entering new user data.

| = 📑 System 🗸 | | | 🌲 🌲 | ? |
|-------------------------|---|-----------------------|------------|----------|
| 🚱 Global Settings 🛛 < | Domain Management > Users > Create New Entry > Edit Entry | Sove | Reset Back | - |
| 🛱 Domain Settings < | Domain : | SYSTEM | | ^ |
| ⊕ Domain Management∨ | * User Name : | | | - 1 |
| Domain Info | * User Password : | | | - 1 |
| Users | User Role : | Standard User v | | - 1 |
| Groups Address Books | * Primary Address : | v | | - 1 |
| Domain Documents | Authentication Type : | internal v | | - 1 |
| Delivery Templates | Is Active : | Yos | | - 1 |
| 🗞 Network Settings 🧹 | Display Name : | | | - 1 |
| I Utilities < | First Name : | | | - 1 |
| 🚯 Help & Support 🛛 < | Last Name : | | | - 1 |
| | Preferred Address Type : | Email | | - 1 |
| | Description : | | | - 8 |
| | + | | | |
| | NOR NOS PRIMARY | ADDRESS TYPE ADDRESS | | |
| | | No records available. | ^ | |
| | | | | * |

3. Select the appropriate domain and enter the user's information.

For Authentication Type, leave the setting to Internal. External authentication method will only work if the User was created via Domain Sync process described on page 30 (Synchronize with Microsoft Active Directory)

- 4. Click Save.
- 5. Error messages e.g., a missing required field appear at the top right-hand corner of the dialog box. If the creation is successful, the message New user is created is displayed in that position.

Synchronize with Microsoft Active Directory

FaxCore lets you add new users from a Microsoft Active Directory. This synchronizing functionality also lets you update data for existing users.

Synchronizing with a Microsoft Active Directory is a one-way read-only process. During synchronization, FaxCore reads the Active Directory and updates the FaxCore database by adding, modifying, or deleting users. The Active Directory is not modified.

Directory Synchronization is set at the Domain level.

You can control which users are updated during synchronization and which ones are not. A FaxCore domain can contain some users that are set to be synchronized with the Active Directory and other users that are set not to be synchronized. So native FaxCore user accounts can co-exist without being affected by directory synchronized accounts. For instructions concerning how to set individual user accounts so that they can be synchronized or not synchronized, see the section titled "Multiple Users" on Page 44.

Current FaxCore users can be included or excluded from synchronization from the Domain Users page by selecting the users and executing the appropriate action (enable directory sync, disable directory sync) from the action drop list.

To synchronize FaxCore user information with a Microsoft Active Directory, navigate to **Domain Setting** > **Directory Sync**. The resulting screen has several sections, which are discussed individually below.

Directory Connection

| Directory Connection | | |
|-----------------------|---|---|
| Last Sync : | | |
| Directory Provider : | MS Active Directory (LDAP) \checkmark | |
| Logon Authentication | | |
| * Logon Server : | 10.10.10.10 | |
| Logon Username : | faxcore \EV6 |] |
| Logon Password : | | |
| Authentication Type : | None V | |
| | | |

Provide required information. For **Logon Server**, provide either the IP address or a DNS resolvable name of the server where the Active Directory resides. **Logon Username** and **Logon Password** refer to logging on to that server.

Search Filter Settings

This step is optional and only used when you want to limit or filter the users that are being synchronized with FaxCore. If you are synchronizing all users from your Active Directory, you can leave these fields blank.

A great tool from Microsoft to figure out what Search Filter strings to use – Active Directory Explorer

http://technet.microsoft.com/en-us/sysinternals/bb963907.aspx

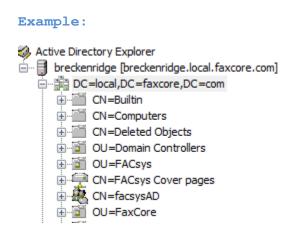
To use Active Directory Explorer:

Run ADExplorer.exe:

| 💴 Connect to Active Directory | | | | |
|---|---------------------------|--|--|--|
| Enter a name for an Active Directory database to which you want to connect. If you previously saved a connection, you do not need to enter a database name. | | | | |
| Connect to: | breckenridge | | | |
| User: | brekenridge Administrator | | | |
| Password: | ••••• | | | |

Connect to: Your Active Directory Servername/IP Address User: User with Domain Admin rights Password: Domain Admin User Password

Expand the server name -> domain name



| oodron niter oottingo | |
|-----------------------|--|
| Domain : | |
| Organization Units : | |
| Security Groups : | |
| Custom Filter : | |
| Properties to Read : | |
| Max Users to Read : | |

Domain

Search Filter Settings

The FQDN of the Active Directory domain within which to search.

Example:

local.faxcore.com

Organization Units

Limit the search to the specified organizational unit(s) under the domain. The organizational units can be specified as a simple unit name or as a fully qualified LDAP path. You can specify multiple organization unit filters in this box by separating them with semicolons.

Example 1:

FaxCore

Sync users within the FaxCore OU in Active Directory.

Example 2:

TestOU1,OU=FaxCore

Sync users within the TestOU01 which is a sub-OU of FaxCore

Example 3:

TestOU1,OU=FaxCore;OU=FaxCore

Sync users within TestOU01 which is a sub-OU of FaxCore AND also sync users within FaxCore OU.

Tips:

To use Active Directory Explorer to get the correct string for OU field:

Right click on the OU that you want to Sync from ADExplorer and click on Properties.

The "**Distiguished name**" field will give you the full string that you need. You will only need the values that has "OU=" for this example the string will read:

OU=TestOU1,OU=FaxCore.

| OU=TestOU1 Properties | | |
|------------------------|---|--|
| Object Properties | Security Attributes | |
| Name: | OU=TestOU1 | |
| Distinguished name: | OU=TestOU1,OU=FaxCore,DC=local,DC=faxcore,DC=co | |
| Object class: | top;organizationalUnit | |
| Schema: | CN=Organizational-Unit,CN=Schema,CN=Configu | |
| | | |

FaxCore automatically adds the first OU=, hence you will only need to enter: TestOU1, OU=FaxCore

Security Groups

Limit the search to the specified security group(s).

Example:

CN=Domain Admins, CN=Users, DC=local, DC=faxcore, DC=com

Syncs users that is a member of "Domain Admins" security group

Tip:

To use Active Directory Explorer to get the correct string for Security Group field:

| CN=Domain Admins Properties | | |
|-----------------------------|---|--|
| Object Properties | Security Attributes | |
| Name: | CN=Domain Admins | |
| Distinguished name: | CN=Domain Admins,CN=Users,DC=local,DC=faxcore,DC= | |
| Object class: | top;group | |
| Schema: | CN=Group,CN=Schema,CN=Configuration,DC=loc Go to | |

Right click on the Security Group and click Properties. Copy the "Distinguished name:" value and paste into the Security Group field in FaxCore.

Custom Filter

Active Directory attribute(s) by which to filter the results. This can comprise of a number of LDAP queries.

Example1:

memberof=CN=Domain Admins,CN=Users,DC=local,DC=faxcore,DC=com
Sync users that is a member of Domain Admins

Example2:

CN=Administrator Sync only user: Administrator

Properties to Read

Additional Active Directory properties by which to filter.

Max Users to Read

Total number of user to synchronize.

General

| Processing Rules - General | | | |
|----------------------------|------------------------|-------|---|
| Synchronize Mode : | Update only | | ~ |
| Enable Auto Sync : | Yes | | |
| * Interval : | Monthly | 00:00 | © |
| * Auto-Sync Next Date : | 10-15-2024 04:41:10 AM | | |

Synchronize Mode is a dropdown with three options:

• add only

Only add any new users found during synchronization.

• update only

Update existing users with changes found during synchronization but do nothing else.

add and update

Add new users and update existing users.

Enable Auto Sync is a dropdown with two options, **Yes** and **No**. If you choose **Yes**, the additional boxes shown above appear, letting you set up the frequency, time, and start date for the auto sync operation.

User Identification

| Processing Rules - User Identification | | | |
|--|--------------|----------------------------------|-----|
| Usernan | ime Format : | full username(bjones@domain.com) | v] |
| | | | |

Specifies how the username is displayed. Options are **short username** (e.g., bjones) or **full username** (e.g., bjones@faxcore.com).

New User Handling

| New User Password : fax Prefer Address Type : Email Authentication Mode : External | Processing Rules - New User Handling | | | |
|--|--------------------------------------|---------------------|--|--|
| Authentication Mode : | * New User Password : | fax | | |
| Authentication Mode : External | Prefer Address Type : | Email | | |
| | Authentication Mode : | External | | |
| Inbound Route Handling : Don't modify routes | Inbound Route Handling : | Don't modify routes | | |

New User Password

This is a default password, available if authentication doesn't work.

Prefer Address Type

This is the Primary address to send successful/failed notifications. This should be set to EMAIL if users will be sending faxes via Outlook or email client because the email address is used to authenticate the user.

Preferred address (email, fax, etc.)

Authentication Mode

External – Users will be authenticated through Active Directory login credentials.

Internal- Users will be authenticated against FaxCore database and the "New User Password" will be the user's default password.

Inbound Route Handling

This is a dropdown with two options:

• don't modify routes Use existing routes.

• add new route

When a new user is added, use the fax number specified for that user in the Active Directory.

Existing User Handling

| Processing Rules - Existing User Handling | |
|---|---------------------|
| Inbound Route Handling : | Don't modify routes |

This is a dropdown with two options:

- don't modify routes Use existing routes.
- update user route Update user's route from the Active Directory.

Inbound Route Handling

Processing Rules - Inbound Route Handling

| Routing Digits Custom Attribute : | |
|--------------------------------------|-----|
| * Priority for New Fax Routes : | 100 |
| Prefix to Append to New Fax Routes : | |
| Max Length for Routing Digits : | 4 |

Routing digits custom attribute

For use in case no fax number is provided in the Active Directory.

By default FaxCore synchronizes the user's Inbound Route with the Fax number (facsimiletelephonenumber) attribute/ field:

| Administrator | Properties ? X |
|---------------|--|
| | Published Certificates Member Of Password Replication Object Security Environment Sessions rol Terminal Services Profile COM+ Attribute Editor Address Account Profile Telephones Delegation |
| Telephone | numbers |
| Home: | Other |
| Pager: | Other |
| Mobile: | Other |
| Fax: | +1 (720) 8704141 Other |
| IP phone: | Other |
| Notes: | |
| | |
| | v 1 |

If the Fax number is not located on this field, you can specify a different attribute to use to create Inbound Routes:

Example:

Mobile

This creates an inbound route for the users with the numbers in the Mobile field.

Prefix to append to new fax routes, Max length for routing digits

Values for these fields are dependent on the specifics of your telephone system and location.

Example:

Setting **Prefix to append to new fax routes** to * and **Max Length** to 4 would means create Inbound Routing rules with the last 4 digits of the value in the Fax field in Active Directory and include a wildcard.

Fax number in Active Directory: +1 (303) 8704141

Inbound Routing rule created: *4141

Deleted User/Domain Handling

| Processing Rules - Deleted User/Domain Handling | | | | |
|---|-------------|--|--|--|
| Deleted user handling : | Ignore user | | | |
| | | | | |

Specifies what to do if a FaxCore user has been deleted from the Active Directory. This is a dropdown with three options:

- **ignore faxcore user** Take no action for this user.
- set faxcore user inactive Don't delete the FaxCore user. Instead set this user to inactive status.
- **delete faxcore user** Delete the user from FaxCore.

Exchange Integration

This section allows users that are synchronized from Active Directory to use their Personal address book from Microsoft Exchange server.

| Exchange | Integration |
|------------|-------------|
| exertainge | nicogradion |

| Exchange Server : | https://mail.yourExchangeServerURL.com |
|--------------------|--|
| Exchange Version : | Exchange 2013 |

Exchange Server

Enter the URL of the Exchange server.

Exchange Version

This is a dropdown. The choices are Exchange 2003 and below, Exchange 2007, Exchange 2007 SP1, Exchange 2010 or Exchange 2010 SP1.

Import Users from a File

You can import users into FaxCore from a file.

Navigate to **Utilities > Import Users**.

| = 📑 суустем 🗸 | | | 🌲 🚢 📀 |
|---------------------------------------|---|------------------------------------|--------------|
| 🚱 Global Settings 🛛 < | Utilities > Import User | | Import Reset |
| 🖧 Domain Settings < | Import Specification | | |
| | * Configure for Domain : | SYSTEM V | |
| · · · · · · · · · · · · · · · · · · · | * Import File : | A | |
| % Network Settings < | | Drag and drop a file here or click | |
| III Utilities 🗸 🗸 | Delimiter Format : | CSV Delimited V | |
| Import Contacts Import Users | Default Settings | | |
| Search Messages | * User Password : | | |
| Search Users Audit Trail | User Role : | Standard User V | |
| Reports | File Attachment Format : | POF THE | |
| Purge Settings | Include Address In Receive Notification : | No | |
| 🚯 Help & Support 🧹 | Include Address In Send Notification : | No | |
| | Authentication : | Internal V | |
| | Route Field : | | |
| | Route Priority : | | |
| | Prefix to append to route : | | |

Import Specification

FaxCore Domain

Specify the domain into which the users are to be imported.

Import File

Click **Browse** to find the file containing the data to be imported.

Header Format, File Type, Has header Format

Use the **Browse** button next to the **Import File** input field to specify the file. For the format of the file, you can use the default format defined by FaxCore, or you can specify your own format. In the **Header Format** input field, select **FaxCore Default Import Header** to use the FaxCore default, or **Custom Header** to use your own format. If you select **Custom Header**, a new input field, **Control File**, appears with a **Browse** button that lets you point to the file in which you have defined your custom layout.

The FaxCore default layout header format specifies that the input fields are to be listed in the following order:

UserName, DisplayName, FirstName, MiddleName, LastName, CompanyName, Email, Fax, Http, Ftp, File, Printer, Mobile, FaxRaw, Phone, Route, Desc, Password, Role, FileFormat, PreferAddressType, ReceiveNotify, SendNotify, Authentication, RouteField, RoutePriority, RoutePrefix, RouteLength, LocalCSID, LocalCallerID

Where the fields have the following meanings:

| Data Field Name | Description | Example |
|-----------------|---|--------------------------|
| UserName | User login name. | johndoe |
| DisplayName | User's display name. | John Milano Doe |
| FirstName | User's first name. | John |
| MiddleName | User's middle name. | Milano |
| LastName | User's last name. | Doe |
| CompanyName | User's company name. | Contoso, Inc. |
| Email | User's email address. Add FMT=PDF/TIF after email address to specify the file format to receive attachments in email. A space is required after email address. | jdoe@contoso.com FMT=PDF |

| Data Field Name | Description | Example |
|-----------------|---|---|
| Fax | User's fax number. | +1-702-870-4141 |
| Http | User's http address. Add FMT=PDF/TIF after http address to specify the file format to post file via HTTP. A space is required after HTTP address. | http://webapp.contoso.com FMT=PDF |
| Ftp | User's ftp address. Add FMT=PDF/TIF after FTP address to specify the file format to post file via FTP. A space is required after FTP address. | ftp://ftp.contoso.com FMT=PDF |
| File | User's file path/address. Add FMT=PDF/TIF after file path to specify the file format to save file to | C:\User\administrator\ FMT=PDF |
| | path. A space is required after file path. Address can be a local path on the FaxCore Server or UNC Path. See example. | <pre>\\pc_name\path\Usn=username;D mn=domain;pwd=password FMT=PDF</pre> |
| Printer | User's network printer. | Sharp Printer |
| Mobile | User's mobile number. | 1-702-870-4141 |
| FaxRaw | User's raw fax number. | 17028074141 |
| Phone | User's phone number. | 1-702-870-2900 |
| Route | User's Inbound Route digits | 4141 |
| Desc | Simple description of the User. | John Doe from Accounting |
| Password | User's Password | password |
| Role | User's Privilege level/role | 4 |
| | 1 = System Admin | |
| | 2 = Domain Admin | |
| | 3 = Super Users | |
| | 4 = Standard Users | |
| | Use only single digit (1,2,3, or 4) in this column | |
| FileFormat | Notification Attachment File Format | PDF |
| | PDF/TIF | |

| PreferAddressType | User's Preferred Address Type. Acceptable values are Email, Fax, HTTP, FTP, File, Printer. Fax.Raw | EMAIL |
|-------------------|--|----------------|
| ReceiveNotify | Specify whether to notify on receive TRUE / FALSE | TRUE |
| SendNotify | Specify whether to notify on send TRUE / FALSE | TRUE |
| Authentication | User is authenticated internally or externally. INTERNAL / EXTERNAL | INTERNAL |
| RouteField | Which column to use to create Inbound Route for the User | FAX |
| RoutePriority | Priority of User 's Inbound Route | 100 |
| RoutePrefix | Additional digits to append to the Inbound Route. | 9 |
| RouteLength | Length in digits to create Inbound Route | 4 |
| LocalCSID | User's CSID to broadcast when sending a fax | Contoso, Inc. |
| LocalCallerID | User's CallerID to broadcast when sending a fax | 1-555-444-3333 |

Suppose you create your own very simple control file that looks like this:

UserName, Email, DisplayName

Your import file might then look something like this:

```
UserName, Email, DisplayName
faxcore01, jsmith@clientcompany1.com, John Smith
faxcore01, hbrown@clientcompany1.com, Helen Brown
faxcore02, mjones@clientcompany2.com, Martha Jones
```

Note the first row, which contains the names of the fields. This is optional. You can include it for your own guidance when entering data. However, if you do include that header row, be sure to select **Yes** in the **Has header** input field, so that FaxCore will ignore that first row.

Default Settings

This section allows Administrators to configure the default settings for the Imported Users if these settings are not available or not specified in the CSV file used for the import. If the setting has been specified on the CSV, the **CSV settings will take precedence**.

User Password (required field – for users that does not have a password specified in CSV file)

Default user password.

User Role

User's privilege level.

File Attachment Format

Default for attached files (PDF or TIF).

Prefer Address Type

Preferred contact method (email, fax, etc.).

Authentication

Internal – This should be configured to internal only because External authentication only works with users that are synchronized from Active Directory.

Remaining Fields

For an explanation of the remaining fields, see the section titled "Inbound Route Handling" on page 36.

Modifying Users

Single User

To change information for a single existing user, follow these steps:

1. Navigate to **Domain Management > Users.**

If necessary, use the search box at the top, labeled Search Users, to find the desired user.
 Note: The search field only searches the selected domain only. For more extensive search, navigate to Utilities > Search > Domain Users

| ≡ - System ~ | | | | | 🌲 📥 📀 |
|-----------------------|---------------------------|--------------|----------------------------|---------------|------------------|
| 😪 Global Settings 🛛 < | Domain Management > Users | | | | |
| 🗱 Domain Settings 🛛 < | + C Action - Move | to : | | Search | ٩ |
| 母 Domain Management> | USER NAME ↑ | DOMAIN NAME | STATUS | EXTERNAL AUTH | ROLE |
| Domain Info | EM-CODES | SYSTEM | ✓ Active | | STANDARD USER |
| Users | EPICADMIN | SYSTEM | Active | | SYSTEM ADMIN |
| | FAXADMIN | SYSTEM | Active | | SYSTEM ADMIN |
| | FXCAGENT | SYSTEM | Active | | FAXAGENT |
| | FXCDISPATCH | SYSTEM | Active | | DISPATCH |
| | FXCRENDERER | SYSTEM | Active | | RENDERER |
| | GENERAL_SYS_UNROUTED | SYSTEM | Active | | STANDARD USER |
| | | OVOTEM | Active | | |
| Utilities < | H I ► H 200 - ite | ems per page | | | 1-36 of 36 items |

3. Click the username. The user dialog box opens.

| = 📑 system 🗸 | | | 🌲 🌲 📀 |
|-----------------------------------|--|--------------------------|------------|
| 🚱 Global Settings 🧹 Domain Mar | nagement > Users > EditEntry | Save | Reset Back |
| C User Pro | ofile General Settings Fax Settings Permission | n SMTP Rolay | |
| 를 Domain Management~ | * User Name : | | API Keys |
| Domain Info | | FAXADMIN | |
| Users | User Role : | | |
| Groups | * Primary Address : | : admin@faxcore.com v | |
| Address Books Domain Documents | Authentication Type: | : Internal V | |
| Delivery Templates | Is Active : | Yun | |
| % Network Settings < | Display Name : | : System Admin | |
| Utilities < | First Name : | System | |
| | Last Name : | 1 Admin | |
| Help & Support < | Preferred Address Type : | Email v | |
| | Description : | : System Admin | |
| + | 8 | | |
| | NOR NOS PRIMA | ARY ADDRESS TYPE ADDRESS | |
| | | EMAIL admin@faxcore.com | ^ |

4. Change information as appropriate and click **Save**.

Multiple Users

There are certain changes that you can perform on multiple users at one time:

- Move user(s) to a different domain
- Set to active/inactive
- Reset password (applies to internal Authentication only. This does not reset the Active Directory password)
- Set privilege level (standard user, super user, administrator)

- Enable external/internal authentication.
 - **Note:** If you enable external authentication for a user, that user's data may be updated if you synchronize the FaxCore user database with a Microsoft Active Directory. To avoid that possibility, enable internal authentication for that user.

To perform any of these changes for multiple users, do the following:

1. Navigate to **Domain Management > Users**.

- Check the box next to the user(s) you want to change. Note that you can check multiple boxes on one page or all of them at one time by using the check box next to User Name in the header row. However, if you change to a different group of names by using the arrows or page numbers at the bottom of the screen, the boxes you have checked will become unchecked.
- 3. To move the checked user(s) to a different domain, use the **Move To:** dropdown at the top of the screen.

| = 🕂 SYSTEM 🗸 | | | 🌲 📥 😨 |
|-----------------------|---------------------------|-------------------------------|--|
| 🊱 Global Settings 🛛 < | Domain Management > Users | | |
| 🗱 Domain Settings 🛛 < | + 🖻 C Action - Move | to : | Search Q |
| | USER NAME | ✓ SYSTEM | INBOUND ROUTE |
| 🖶 Domain Managementy | | Bruce Domain | A |
| | SYS-MAILER | Connectis | RD USER |
| Users | SYS-RECEIVE | DougsTest | RD USER |
| | SYS-STRESS | ~ | RD USER |
| | SYS-TEST | | RD USER |
| | SYS-UNROUTED | ~ | RD USER [Routing Digit] = '*' |
| | TBOATWRIGHT | Company A | ADMIN |
| | TESTATA | SYSTEM Active | STANDARD USER |
| | TLINHARD | SYSTEM CACtivo | SYSTEM ADMIN [Routing Digit] = '*6474975896' |
| | WCP | SYSTEM C Active | SYSTEM ADMIN |
| 🚯 Help & Support 🛛 < | WES | SYSTEM C Activo | SYSTEM ADMIN |
| | FXCDISPATCH | SYSTEM | DISPATCH |
| | FXCAGENT | SYSTEM C Activo | FAXAGENT |
| | FXCRENDERER | SYSTEM C Activo | RENDERER |
| | 4 ★ 4 1 ► × 200 ★ ite | ms per page | ► I-36 of 36 items |

4. To apply any of the other actions listed above to the checked user(s), use the **Action** dropdown at the top of the screen.

| = 📑 System 🗸 | | | | | | 🌲 📥 🥹 |
|-----------------------|---|---------------|----------------------------|---------------|---------------|---------------------------------|
| | Domain Management > Users | | | | | |
| 🚓 Domain Settings 🛛 < | + C Action - Move | e to : | | | Searc | ch Q |
| 🖶 Domain Management 🗸 | USER NAM Set Active Set Inactive | NAME | STATUS | EXTERNAL AUTH | ROLE | INBOUND ROUTE |
| Domain Info | SYS-MAILEF Reset Password | | Active | | STANDARD USER | • |
| Users | SYS-RECEIN Set Privilege Stan | | Active | | STANDARD USER | |
| | SYS-STRESS Set Privilege Supe Set Privilege Adm | | Active | | STANDARD USER | |
| | SYS-TEST Enable External A | | Active | | STANDARD USER | |
| | SYS-UNROL Enable Internal A | uthentication | Active | | STANDARD USER | [Routing Digit] = '*' |
| | TBOATWRIGHT | SYSTEM | Active | | SYSTEM ADMIN | |
| | TESTATA | SYSTEM | Active | | STANDARD USER | |
| | TLINHARD | SYSTEM | Active | | SYSTEM ADMIN | [Routing Digit] = '*6474975896' |
| | WCP | SYSTEM | Active | | SYSTEM ADMIN | |
| Help & Support < | WES | SYSTEM | Active | | SYSTEM ADMIN | |
| a non a copport | FXCDISPATCH | SYSTEM | Active | | DISPATCH | |
| | FXCAGENT | SYSTEM | Active | | FAXAGENT | |
| | FXCRENDERER | SYSTEM | Active | | RENDERER | • |
| | < | tems per page | | | | I-36 of 36 items |

User/Domain Permissions

FaxCore Permissions Hierarchy

Permissions are set at the domain level for the entire domain. The system administrator can define domain level permissions that in many cases override user level permission set up by domain administrators. For example, the system administrator can specify that a particular domain is not allowed to send international faxes.

Even if the domain administrator specifies that the users can send international faxes, the setting will be overridden by the domain level setting.

Configuring User Permissions

To set permissions for all users in a given domain, navigate to **Domain Settings > User Permissions** and select the desired domain from the domain dropdown.

Set permissions as desired and click **Save** to save those settings.

Specific Settings

Send Permissions > Allow http sending

Allow users in domain to send HTTP posts to URL. (example: Post to a SharePoint Document library)

Send Permissions > Allow ftp sending

Allow users in domain to upload file to FTP folder/locations.

Send Permissions > Allow file sending

Allow users in domain to upload file to folder.

Send Permissions > Allow printer sending

Allow users in domain to print to printer.

Document Permissions > Allow Document Upload

Allow users in domain to upload and share documents.

Document Permissions > Document Quota

Allow users in domain to upload documents up to the specified maximum size.

Notifications Permissions

In order for users to receive email notifications, you must first enable the appropriate user permissions. This is done in the **Notifications Permissions** section of the page. The permissions in that section have the following meanings:

Allow Notify When Message Receive Success Lets FaxCore notify the users upon receive success.

Allow Notify When Message Receive Fail Lets FaxCore notify the users upon receive fail.

Allow Notify When Message Send Success

Lets FaxCore notify the users upon send success.

Allow Notify When Message Send Fail

Lets FaxCore notify the users upon send fail.

Note: By default, these settings are set to "Yes"

Working with Faxes & Messages

Working with Inbound Faxes

Routing Inbound Faxes to Users

Inbound routing rules tell FaxCore how to route inbound faxes to users. When a fax is received, FaxCore searches for an appropriate inbound routing rule to determine where to route the fax to. This means that FaxCore checks to see if the fax properties match the criteria specified in an inbound routing rule. If they do match, then the fax is routed to the user or group defined in the rule.

Inbound Routing Methods

Inbound faxes can be routed based on several properties of the received fax, including the following:

- Barcode data (Optional Module)
- Fax port number
- Routing digits
- Remote caller ID
- Remote CSID
- Server name

Note: Some of the above routing methods may not be available to route on based on telco configurations

Create New Inbound Routing Rule

To create a new inbound route:

- 1. Navigate to Global Settings > Inbound Routing.
- 2. Click + The Inbound Routing Rule dialog box opens.

| Global Settings > Inbound Routing > Create New Entry | | Save Reset Back |
|--|--|-----------------|
| Inbound Routing Rule | | |
| Forward Type : | User | ~ |
| * Forward Address : | (WES) x | |
| * Conditions : | Routing Digits v *1234 | AND ~ |
| | Routing Digits | Set |
| * Route String : | | |
| | | |
| Activate Route : | Yes | |
| * Priority : | 100 | |
| | * higher number is higher priority. (1-9999) | |
| Allow Loopback Checking : | No | |
| Route by time-based : | No | |

- 3. Use the **Forward Type** dropdown to specify whether this rule applies to a single user or a group.
- 4. Click in the **Forward Address** box to bring up a separate dialog box for selecting a user or group address.
- 5. Use the dropdowns in the **Conditions** section to create the rule, and then click **Set**. The **Route String** box is automatically populated, as in the example screen shot above.
- 6. When all desired properties have been set, click **Save**.

Edit Existing Inbound Routing Rule

- 1. Navigate to **Global Settings > Inbound Routing**.
- 2. Existing inbound routing rules are listed on this page. Use the **X** icon to delete an existing rule or the pencil icon to edit it.

Managing Un-routed Fax

Faxes that do not match an inbound routing rule are considered un-routed fax. These faxes are by default routed to a system user called: **SYS-UNROUTED**. This system user's main purpose is to store unrouted fax.

The inbox of SYS-UNROUTED user can be displayed as a system folder in the User Interface called "Unrouted"

| = | | | | | | | 🌲 📥 🔮 |
|---------------------|------------|-----------------------|-----------|---------------|---------|--------|-----------------|
| 🕈 New 🗸 | Unrouted 0 | | | | | | |
| 🖻 Messages 🗸 🗸 | New 🖹 C | 5 minutes - Actions - | | | Searc | ch | ٩ |
| | DATE | MSGNO RECIPIENT | PAG FROM | CALLER ID | SUBJECT | STATUS | ROUTING IN |
| | | | No record | ls available. | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Unrouted Spam | | | | | | | |
| | | | | | | | |
| 🖆 Address Books 🛛 < | | | | | | | |
| Documents < | | | | | | | |
| | | | | | | | Ţ |
| | 4 | 15 🔹 items per page | | | | | No record found |

The **Unrouted** folder is NOT VISIBLE to users by default. To enable users to view/assign messages from this folder, administrator must enable the permission of the user(s) to "**Allow user to Assign Messages**".

To allow ALL USERS in a specific domain to Assign Messages / view the "Unrouted" folder

Navigate to Domain Settings > User Permissions and scroll to User General Permissions

Set "Allow user to assign messages" to "Yes"

| = 📑 system 🗸 | | | 🌲 🔒 🔮 |
|-------------------------------------|--|---------------|---------------------------------------|
| 🚱 Global Settings 🛛 < | Domain Settings > User Permission | | Save Apply All Keep All Local Setting |
| 🖓 Domain Settings 🗸 🗸 | User General Permissions | | · |
| Domain Settings | Allow User to Assign Messages : | Yes | |
| User Permission | Allow Delete Message Permanently : | Yes | |
| Directory Sync | Default User Privilege : | Standard User | ~ |
| Fax Settings SMTP Relay Settings | Enable Exchange Address Book Integration : | No | |
| Tracking Config | Allow Send Broadcast Message : | No | |
| Tracking Dictionary | Allow Message Delegation : | No | |
| Black List Subscription | Allow Message Auto Resume : | No | |
| 🖶 Domain Management < | - Allow View Message History : | NO | |
| 🔗 Network Settings 🛛 < | User Public Address Book Permissions | | - |
| œ Utilities < | Allow Address Book Edit : | Yes | |
| | Minimum Required Edit Privilege : | Super User | |
| Help & Support < | Personal Folder Permissions | | |
| | Allow Personal Folder Level : | 3 | |
| | Natification Permissions | 3 | |

Click "Save" and "Apply All". All users within the selected Domain will now have access to the "Unrouted" folder.

To allow specific users to Assign Messages / view the "Unrouted" folder

- Navigate to Domain Management > Users and locate the user to allow access to the "Unrouted" folder.
- 2. Click on the user to edit the user settings.
- 3. Navigate to the Permissions tab and set "Allow user to assign messages" to "Yes".

| Nomain Management > Users > Edit Entry | Save Reset Back |
|--|------------------------|
| User Profile General Settings Fax Settings Permission SMTP Relay | |
| User General Permissions | Keep All Local Setting |
| Allow User to Assign Messages : Yes | |
| Allow Delete Message Permanently : Yes | |
| Allow Send Broadcast Message : No | |
| Allow Message Delegation : No | |
| Allow Message Auto Resume : No | |
| Allow View Message History : No | |
| User Public Address Book Permissions | |
| Allow Address Book Edit : Yes | |
| Personal Folder Permission | |
| Allow Personal Folder Level : 3 | _ □ |
| | • |

4. Click "Save & Close" when done. The user will now have access to the "Unrouted" folder when he/she log in to the FaxCore Web User Interface.

Printing Faxes with Network Printers

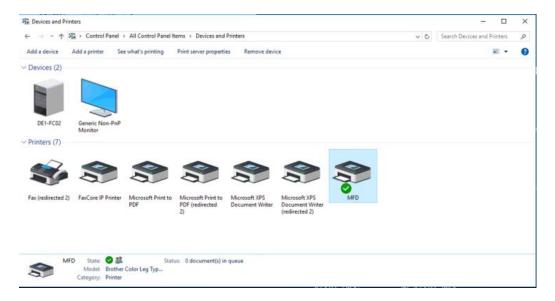
In many occasions, faxes need to be printed out as a hard-copy document. FaxCore provides users with the option to print faxes manually from the User Interface or setup a Network Printer in their User Profile to print faxes automatically.

Before Network Printers are made available to users in FaxCore, Administrators must first add the network printers to the system. This section describes the steps to add a network printer to the FaxCore server.

Setting up Network Printer

Step1: Install Printer Drivers to FaxCore Server in Windows

Firstly, install the Printer to the FaxCore server as a local printer and make sure you are able to print to the printer by doing a Print Test Page on Windows.



Step2: Add Network Printer to FaxCore

- 1. Next navigate to Global Settings > Printer Settings and click on "+"
- 2. Enter a Printer Label for the Printer, Example: MFD

| Global Settings > Printer Settings > Edit Entry | r Domain : SYSTEM * Printer Label : MFD Description : MFD Visibility : Private Active : Yes | | | | Back |
|---|---|--|--|---|------|
| Network Printer | | | | | |
| Domain : | SYSTEM | | | | |
| * Printer Label : | MFD | | | | |
| Description : | MFD | | | | |
| Visibility : | Private | | | ~ | |
| Active : | Yas | | | | |
| Server name : | | | | | |
| Authentication | | | | | |
| Connect Domain : | | | | | |
| Connect User Name : | | | | | |
| Connect Password : | | | | | |
| Page Setup | | | | | |
| * Printer Name : | MFD | | | | |
| Paper Size : | Printer Default | | | ~ | |
| Font Name : | Arial | | | ~ | |
| | | | | | |

- 3. Enter the **Printer Name** of the printer we're adding. The Printer Name must match the exact same name of the Printer in Windows.
- 4. Click Test Print to see test the printer.
- 5. Click "**Save"** when done.

Users will now be able to:

• Add the printer to their User Profile to setup printer to print automatically on Receive and Send as Notifications.

| = 📑 system 🗸 | | | 🌲 🔺 🔮 |
|-----------------------|--|---------------------------|-----------------|
| | Domain Management > Users > Edit Entry | | Save Reset Back |
| 🚓 Domain Settings 🛛 < | User Profile General Settings Fax Settings Per | nission SMTP Relay | |
| 🖶 Domain Management 🗸 | First Name : | System | |
| Domain Info | Last Name : | Admin | |
| Users | Preferred Address Type : | Email | |
| | Description : | System Admin | |
| | + | | |
| | NOR NOS PRIMA | RY ADDRESS TYPE ADDRESS | |
| | | EMAIL admin@faxcore.com | <u>^</u> |
| | | EMAIL ckaiser@faxcore.com | |
| | | EMAIL sam@faxcore.com.my | |
| | | Printer MFD | |
| | H H I H I5 V items per page | | 1-4 of 4 items |

• Print messages from the Message Viewer.

| Message # 18637 > SYS-RECEIVE(FAX) | | | D PDF | Print Local | Actions - |
|---|--|---|-------|--|-----------|
| Completed Curvelect All (1) C | Attention to:- Name: Company: Date: 10-27-2020 Time: 09:03:27 P RE: Test Comments/Notes: Test | From:- Name: Wes Company: FaxCore, Inc. Telephone: Pages: 1 | | ➡ Print Local ➡ Print Network | |

Working with Outbound Faxes

FaxCore provides various methods to send outbound faxes.

Print to Fax (FaxCore Print Driver)

Users can print to FaxCore Print Driver from a native application such as Microsoft Word, Excel, QuickBooks, etc. to submit a fax to FaxCore. Refer to FaxCore Printer Driver Video for more details.

Web UI

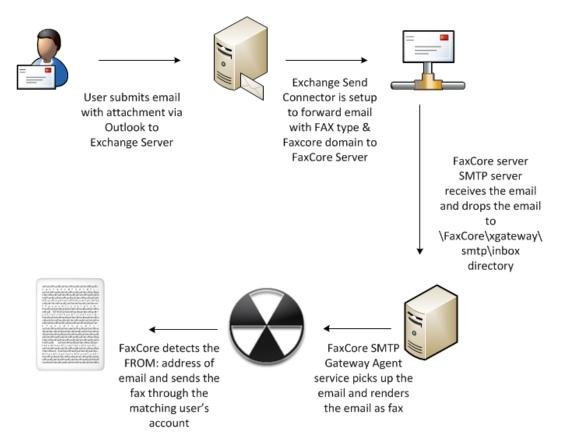
Users can logon to FaxCore Web User Interface to submit a fax/message by attaching documents. Refer to FaxCore User Interface Video for more details.

Email to Fax

Introduction

In an effort to eliminate any IT concerns about installing 3rd party software on the email server, FaxCore utilizes a standard Microsoft Exchange SMTP connector to relay messages destined for FAX address to the FaxCore fax server.

This method provides direct conversion of Microsoft Exchange Business Fax address types to outbound fax addresses. Advanced configuration allows administrators to grant email to fax privileges to specific users or mail server domains, eliminating the possibility of external spamming of the FaxCore server's SMTP email gateway.



The above diagram illustrates the complete workflow of FaxCore email to fax feature. This section covers configuration and setting up FaxCore to enable email to fax. To implement email to fax, the following steps are required:

- 1) Setup Exchange Server Send Connector/SMTP Connector
- 2) Setup FaxCore Server SMTP service to drop to SMTP gateway folder
- 3) Configure SMTPGatewayAgent.exe.config file (optional)

Upon configuration of the above steps, emails with the following address format will be submitted to FaxCore to be sent out as fax.

Basic SMTP email format:

```
faxnumber@fax.yourdomainname.com
(e.g. +1-720-870-4141@fax.faxcore.com)
```

Advance SMTP email format to include more information with the fax:

faxnumber/name/company/tracking/billing@fax.yourdomain.com
(e.g.
+1-720-870-4141/JohnDoe/ContosoInc/Trackingkey1/Billingcode1@fax.faxcore.com)

Outlook Business Fax Address format:

[FAX:Name@Number@Company]
(e.g. [FAX: Tom Linhard@+1-720-870-4141@FaxCore]

Setup Exchange Server Send Connector/SMTP Connector

Exchange 2013 / 2016

Step 1: Add a 'Send Connector' to Microsoft Exchange 2013 server for the address space: 'fax.faxcore.com' (Substitute fax faxcore.com for your domain name)

- 1. Open the Exchange Management Console > Organization Configuration > Hub Transport.
- 2. Under 'Actions' select 'New Send Connector'.

| 😹 Exchange Management Console | | | | | |
|--|-----------------|------------------|-------------------------|-----------------|----------------------------|
| File Action View Help | | | | | |
| 🗢 🔿 🞽 🖬 🚺 🖬 | | | | | |
| Microsoft Exchange | 🗟 Hub Transport | | | 2 objects | Actions |
| Microsoft Exchange On-Premise Image: Image of the second secon | Remote Domains | Accepted Domains | E-mail Address Policies | Transport Rules | Hub Transport 🔺 |
| Anibox | Journal Rules | Send Connectors | Edge Subscriptions | Global Settings | in New Remote Domain |
| Client Access | 🌱 Create Filter | | | | 🕺 New Accepted Domain |
| Unified Messaging | Name A | Status | | | 🧾 New E-mail Address Polic |
| 🗄 📋 Server Configuration | FaxCore 2007 | Enabled | | | New Transport Rule |
| Recipient Configuration | Minternet | Enabled | | | New Journal Rule |
| | | | | | New Send Connector |

- 3. In the 'New SMTP connector' wizard enter the 'Name' for the connector in the 'Introduction' screen. The name can be set to: 'FaxCore SMTP Connector'. (Or any descriptive name you like)
- 4. From the 'Select the intended use for this Send Connector' drop down list box select 'Custom'.

| New S | Send Connector |
|------------------|---|
| Introduction | Introduction |
| Address space | This wizard helps you create a new Send connector. After you create the Send connector, right-click it in the work pane and then click Properties to configure other properties that |
| Network settings | aren't shown in this wizard. |
| Source Server | Name: |
| New Connector | FaxCore SMTP Connector |
| Completion | Select the intended use for this Send connector: |
| | Description: Select this option to create a customized connector, which will be used to connect with systems that are not Exchange servers. |

- 5. In the 'Address space' screen click on 'Add' and enter 'fax.faxcore.com' (replace 'fax.faxcore.com with your domain name). Click 'Ok'.
- 6. Ensure that the address space created has the default 'Type' of 'SMTP', and click Next'.

| New S | Send Connector | | | |
|------------------|-----------------------|--|------------|--|
| Introduction | Address space | | | |
| Address space | Specify the address s | pace(s) to which this connector will r | oute mail: | |
| Network settings | 🚽 🕹 🕹 🚽 🕹 | lit 🗙 | | |
| Source Server | Туре | Address | Cost | |
| New Connector | SMTP | fax.faxcore.com | 1 | |
| Completion | | | | |
| | | | | |

- 7. In the 'Network Settings' screen choose 'Route mail through the following smart host'.
- 8. Click on 'Add' and insert the 'IP address' of the server where FaxCore is installed and click 'Next'.

| New S | Send Connector |
|--------------------|---|
| Introduction | Network settings |
| Address space | Select how to send mail with this connector: |
| 🔲 Network settings | C Use domain name system (DNS) "MX" records to route mail automatically |
| Source Server | Route mail through the following smart hosts: |
| New Connector | 🗣 Add 🧪 Edit 🗙 |
| Completion | Smart host |
| | [192.168.10.10] |
| | |

9. In the 'Configure smart host authentication settings' screen set "None" and click 'Next'.

| New Send Connector | | | |
|--|--|--|--|
| Introduction | Configure smart host authentication settings | | |
| Address space | None | | |
| 🛄 Network settings | O Basic Authentication | | |
| Configure smart host authentication settings | Basic Authentication over TLS User name: | | |

- 10. In the 'Source Server' screen select the Hub Transport server with which the connector will be associated (If it isn't already defaulted to the correct server).
- 11. Complete the wizard to create the 'Send Connector'.

When the Send Connector Wizard is complete, the FaxCore connector will be available in the 'Send Connector' tab. This connector should be set to '**Enabled**' by default.

Step 2: Add a Send Connector for the FAX Address Space

This is the step that allows you to send faxes by using the "Business FAX" addresses in your outlook client contacts, or by specifying a fax on the address line as [FAX:anyone@1234567890].

Important: This cannot be done via the Exchange Management Console; you must use the cmdlets in the Exchange Management Shell. Exchange Management Console will only allow SMTP connectors to be created.

- 1. Open 'Exchange Management Shell' from 'Start' -> 'Programs' -> 'Microsoft Exchange 2007'.
- 2. In the console enter the following: new-sendConnector FAX -DnsRoutingEnabled:\$false -Smarthosts:<IP of machine where FAXCore is installed>

```
Example:
new-sendConnector FAX -DnsRoutingEnabled:$false -
Smarthosts:192.168.1.5
```

- 3. Press enter and when prompted for 'AddressSpaces[0]:' type in: FAX:*
- 4. Press Enter Twice. You should end up with something like this:

Cmdlet new-sendConnector at command pipeline position 1

Supply values for the following parameters:

AddressSpaces [0]: FAX:* AddressSpaces [1]: Identity AddressSpaces Enabled FAX <FAX:*:1> True

You should now be able to view the new connector by opening the 'Exchange Management Console' -> 'Organization configuration' -> 'Hub Transport' -> 'Send Connector'.

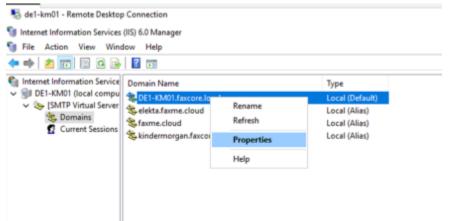
After doing those two things, you will need to restart <u>ALL</u> Exchange 2007/2010 services. (It may be easier to restart the server). You will also need to go in and rebuild the Offline Address Book so that the new address spaces are created and sent to the Outlook client.

If you do not restart and rebuild, you will get an NDR saying "None of your e-mail accounts could send to this recipient." when you try to send a FAX from Outlook.

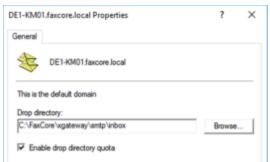
Setup FaxCore Server SMTP service to drop to SMTP gateway folder

Step 1: Setup Default SMTP Drop Folder

- On the FaxCore server, navigate to Start Menu > Administrative Tools > Internet Information Services (6.0) Manager.
- Expand SMTP Virtual Server and select Domains. On the right pane, locate the Default Domain Name (should be your FaxCore server name) > right click on it and select Properties.



3. Click on Browse and browse to FaxCore install directory\xgateway\smtp\inbox as shown in the next screen.



Step 2: Add SMTP domain names

1. Right click on Domain and select New -> Domain

| de1-km01 - Remote linternet Information 1 linternet Action View c c c c c c c c c c c c c c c c c c c | Services (IIS) 6.0 Mana Window Help | ger | | |
|--|--|-----------------|--------|--|
| Internet Information DE1-KM01 (local (SMTP Virtual Domain | compu | 1.faxcore.local | | Type Local (Default) Local (Alias) |
| Curren | New | 3 | Domain | Local (Alias) |
| | View New Window from | n Here | 1 | Local (Alias) |
| | Refresh Export List | | | |
| | Help | | | |

2. Select "Alias" on the "New SMTP Domain Wizard" window and click "Next".

| New SMTP Domain | Wizard | × |
|-----------------|---|---|
| | Welcome to the New SMTP Domain Wizard | - |
| C C | Use this wizard to create a new domain on this SMTP virtual server. | |
| | Specify the domain Type: | |
| | C Remote | |
| | (* Alas | |
| | | |

- On the next screen, enter the domain name/address space that is configured on the Exchange Send Connector in earlier section (Step 1: Add a 'Send Connector' to Microsoft Exchange 2013 server for the address space: 'fax.faxcore.com' (Substitute fax faxcore.com for your domain name))
- 4. Repeat the above steps to add your local SMTP domain to the list. For Example: local.contoso.com

Configure SMTPGatewayAgent.exe.config file (optional)

This step is optional and only required to change the configuration of the SMTP Gateway service other than the default settings. The SMTPGatewayAgent.exe.config file located in \FaxCore\ directory provides administrator to configure the following options:

| Кеу | Description | Default Values: |
|------------------------------|---|---------------------|
| baseDirectory | Base Directory of the SMTP gateway folders | xgateway\smtp |
| inboxDirectory | Drop folder to monitor incoming emails to fax | xgateway\smtp\inbox |
| treatEmailBodyAsD ocument | Specifies whether to treat email body as a separate document. If set to "0", email body will be included in the Notes section of the coverpage. (0 = NO, 1 = YES) | 0 |
| inBodyAuth | Specifies whether to use authentication in email body. (0 = NO, 1 = YES). | 0 |
| | If set to yes, email body must contain the following on the first line of the email body: | |
| | <pre>[user: Encryptedpass] Example: [jdoe: 0PjIJYa6udJtQGQ0L1FwnCr5tv0ZxAHK] To encrypt the password, use <u>http://faxcoreserver/_debug/testencrypt.aspx</u></pre> | |
| maxAttempts | Maximum number of retries on failures before considering the email has failed with exceptions. | 2 |

| Кеу | Description | Default Values: |
|--------------------|--|-------------------|
| | Emails with exceptions will be moved to \Exceptions folder in the "baseDirectory" along with a XML file specifying the error that has occurred. | |
| attemptIntervalSec | Interval for each attempt to grab emails from the inbox folder. | 30 |
| removePrefix | SAP email connector appends FAX to the email address. This property configures SMTP Gateway Agent to strip off the prefix. | FAX |
| IMESEQ | Specify the sequence for [FAX:] address types. The sequence of the address types (NAME, ADDR, COMPANY) can be configured in any order. | NAME@ADDR@COMPANY |

SMTPGatewayAgent.exe.config file can be edited with any text editor such as Notepad. After modifications has been made, save the file and restart the FXC6.SMTPGatewayAgent service with Windows Management Console.

File Gateways

Configuring FaxCore File Gateways

This section explains the how to configure and enable a file gateway. Detailed information about the functionality of specific gateways can be found in "Appendix E - Gateway Specifications" at the end of this document.

FaxCore Evolution eV6 supports the following gateway out of the box:

- Control file
- Embedded codes
- Embedded codes for PCL
- Embedded codes for PDF
- HP SMTP
- SAP
- Oracle
- Xerox SMTP

Custom gateway reflects the above gateways list, provide option to create more than one of each gateway type.

In the instructions below, the name of the gateway is referenced as <gatewayName>. When performing the steps, substitute the appropriate value for this parameter.

Configuring and enabling a gateway is a 3 step process.

Step 1: Configure a profile for a file gateway

Configuration settings for each file gateway are located in the GatewayAgent.exe.config file at the root directory of the FaxCore installation. Each set of processing directories must have its own section (profile) in the config file.

| Parameter | Description | Required | Default Value |
|---------------------------|---|-------------------------------------|------------------------------------|
| baseDirectory | The full path to the root directory where the processing directories are created. The directory monitor creates the following directories underneath the baseDirectory: complete, exception, unauthorized, temp | Yes | xgateway\c ontrolfile |
| inboxDirectory | The full path to the inbox directory where files are placed to be processed. May contain UNC directories. | Yes | xgateway\c ontrolfile\i nbox |
| processFileMask | The file mask indicating the files the directory monitor should scan for processing. | Yes for control file gateways | *.ctl |
| defaultUserName | The default FaxCore user to assign to created messages. Every message in FaxCore must be owned by a FaxCore user account. This parameter can be used to allow anonymous files to be processed if the user account is not specified directly in the file. The value of this parameter should be the username that is used for logging into the FaxCore server. | No | em-codes |
| allow Anonymous U sers | Indicates that FaxCore should try to use the defaultUserName even if a username is specified in the file but can't be authenticated. By default (if this is set to 0), if a username is specified in the file, but it does not | No | 1 |

The following parameters can be configured for each gateway profile:

| | exist in FaxCore, the gateway processor with throw an Unauthorized error. | | |
|-------------------------------|--|---------------------------------|------------|
| userNamePrefix | Indicates a prefix that prefixes any username field. FaxCore will strip off this prefix before identifying the FaxCore user. | No | null |
| inputFileType | The type of files (extension) that are being placed in the inbox directory. Used by some gateways to determine the type of file when the extension is not included in the file name. | No | TIF or PDF |
| isInputFileBinary | 1 if the input file type is in binary format. 0 if the input file type is text. | Yes | 0 |
| binaryDataStartInd ex | For Embedded Codes binary files, specifies the text string that indicates the start of the binary data, and the end of the embedded codes. For PDF, this is usually: %PDF | Yes for binary code files | |
| preserve Codes In Ou tput | For Embedded Codes files, specifies if the embedded codes text should be preserved in the output file. | Yes for embedded codes | 0 |
| faxAsRaw | Determines whether to treat all fax numbers as raw numbers. Raw numbers are not parsed and normalized by the FaxCore parsers. Set to 1 to treat as raw, or 0 to have FaxCore parse the numbers. | No | 0 |
| includeSenderNotif ication | Indicates if FaxCore should include the default notifications set up in the FaxCore user profile. | Yes | 0 |
| includeSenderCove rPage | Indicates if FaxCore should include the default cover page(s) set up in the FaxCore user profile. | Yes | 0 |
| maxAttempts | | | |
| • | The maximum attempts to try to process a single file. | Yes | 2 |

Step 2: Enabling the Directory Monitor

The Directory Monitor is invoked through the FXC6.FileGateway service. The GatewayAgent is configured in the GatewayAgent.exe.config file at in \Faxcore\svc.filegateway. To enable automatic processing of a gateway, you can edit the corresponding entries to the FaxCore GatewayAgent so that it is aware of the gateways to monitor. Look for the key TYPE in the config file and turn on each file gateway by using the value 1 and 0 to turn off directory monitor for a particular gateway (by default, all gateways are turned on).

```
<TYPE>
<add key="controlFile" value="1"/>
<add key="embeddedCodes" value="1"/>
<add key="embeddedCodesPc1" value="1"/>
<add key="embeddedCodesPDF" value="1"/>
<add key="hpDigitalSender" value="0"/>
<add key="SAP" value="1"/>
<add key="FujiXeroxXST" value="1"/>
<add key="FujiXeroxXST" value="1"/>
<add key="Cracle" value="1"/>
<add key="Xerox" value="1"/>
</TYPE>
```

Step 3: Restart the FaxCore Gateway

The FaxCore Gateway (FXC6.Gateway) must be restarted in order to pick up the changes made in step 2 above. Restart the FXC6.Gateway service using Windows Service Control Manager.

Defining a New Gateway Specification

The process of defining a new gateway specification consists of creating and modifying various FaxCore configuration files, and possibly database metadata. Please contact FaxCore technical support for help with creating new gateway specifications. Click here for **Support** contact information.

PCL Print Spooler

FaxCore Evolution EV6 PCL Print Spooler is a service that enables FaxCore to monitor and respond to embedded codes through a print stream. The FaxCore Print Spooler allows document with attached embedded codes to be sent to a printer instead of exporting to a file and then processing.

Configuring FaxCore to Process Print Streams with Embedded Codes

This consists of two steps:

- 1. Installing FaxCore Evolution EV6 PCL Print Spooler service.
- 2. Configuring the FaxCore Evolution EV6 GatewayAgent to process PCL embedded codes.

Installing FaxCore Evolution EV6 PCL Print Spooler Service

Download and run FaxCorePCLPrintSpooler.msi. Follow the on-screen instruction to install the FaxCore Evolution EV6 PCL Print Spooler service to the FaxCore installation directory.

After installation, a new service called FXC6.PCLPrintSpooler is created on the system and started automatically.

Configuring FaxCore Evolution EV6 GatewayAgent to process PCL Embedded Codes.

To configure FaxCore Evolution EV6 GatewayAgent to process PCL Embedded Codes, open and edit the FileGatewayAgent.exe.config file located in C:\Faxcore\svc.filegateway - with Notepad or an editor of your choice.

Make sure that EmbeddedCodesPCL is enabled. This is already configured by default during installation.

```
<Gateways>

<TYPE>

....

<add key="embeddedCodesPcl" value="1"/>

....

</TYPE>
```

This lets FaxCore process the incoming print streams from the FaxCore PCL printer.

After the appropriate change has been made to the GatewayAgent.exe.config file, PCL files with embedded codes can be accepted from the FaxCore Evolution EV6 PCL Print Spooler service.

Alternatively, the files can be manually put into a directory. To do this manually, place the PCL files with embedded codes in the

\FaxCore\svc.filegateway\xgateway\embeddedCodesPcl\inbox directory.

Installing FaxCore PCL Printer

On the client machine, go to **Control Panel > Printers and Faxes > Add Printer**.

| Choose a No devices four | device or prin | ter to add to | this PC | | |
|-----------------------------|----------------|---------------|---------|--|--|
| | | | | | |
| | | | | | |
| | | | | | |

Click "The printer that I want isn't listed. Then click Next.

| | | × |
|--------------|---|---|
| \leftarrow | 🖶 Add Printer | |
| | Find a printer by other options O My printer is a little older. Help me find it. | |
| | • Find a printer in the directory, based on location or feature | |
| | ○ Select a shared printer by name | |
| | Browse | |
| | Example: \\computername\printername or http://computername/printers/printername/.printer | |
| | ○ Add a printer using a TCP/IP address or hostname | |
| | O Add a Bluetooth, wireless or network discoverable printer | |
| | Add a local printer or network printer with manual settings | |
| | | |
| | | |
| | Next Cance | ł |

Select Add a Local Printer or Network printer with manual settings.



Select Create a new port and choose Standard TCP/IP Port.

| | | | > |
|---|----------------------------------|--|--------|
| ← | 🖶 Add Printer | | |
| | Choose a printer port | | |
| | A printer port is a type of conr | nection that allows your computer to exchange information with a printer | |
| | OUse an existing port: | LPT1: (Printer Port) | \sim |
| | Oreate a new port: | | |
| | Type of port: | Standard TCP/IP Port | ~ |



Click **Next** and Enter the IP address of the FaxCore server.

| ÷ | 🖶 Add Printer Type a printer hostname o | X |
|---|--|---------------------------------|
| | Type a printer nostname o | of the address |
| | Device type: | TCP/IP Device \checkmark |
| | Hostname or IP address: | 192.168.2.52 |
| | Port name: | 192.168.2.52 |
| | Query the printer and automat | ically select the driver to use |
| | | |
| | | |
| | | |
| | | |
| | | Next Cancel |

Click **Finish**. Port configuration is complete.

| Add Standard TCP/IP Printer Port | Wizard 🛛 🔀 | |
|---|---|--|
| TCP, | Completing the Add Standard TCP/IP Printer Port Wizard You have selected a port with the following characteristics. | |
| SNMP: Protocol Device: Port Nar Adapter | : RAW, Port 9100 192.168.2.52 | |
| To comp | olete this wizard, click Finish. | |

The Install Printer Software screen appears.

| Add Printer Wizard | | | | |
|---|--|--|--|--|
| Install Printer Software The manufacturer and model determine which printer software to use. | | | | |
| Select the manufacturer and model of your printer. If your printer came with an installation disk, click Have Disk. If your printer is not listed, consult your printer documentation for compatible printer software. | | | | |
| Manufacturer Printers Fujitsu Fujitsu GCC HP LaserJet 3200 Series PCL Gestether HP LaserJet 44 HP HP LaserJet 4000 Series PCL IDM HP LaserJet 4000 Series PCL | | | | |
| < <u>B</u> ack <u>N</u> ext > Cancel | | | | |

Recommend selecting HP for Manufacturer, then select the HP LaserJet 4000 PCL printer.

| Ad | Add Printer Wizard | | | |
|----|---|--|--|--|
| | Use Existing Driver A driver is already installed for this printer. You can use or replace the existing driver. | | | |
| | HP LaserJet 5 | | | |
| | Do you want to keep the existing driver or use the new one? Keep existing driver (recommended) Replace existing driver | | | |
| | < <u>B</u> ack <u>N</u> ext > Cancel | | | |

If the driver exists, select **Keep existing driver**.

| dd Printer Wizard | |
|--|--|
| Name Your Printer You must assign a name to this printer. | |
| name combinations of more than 31 chai possible. | me programs do not support printer and server acters, it is best to keep the name as short as |
| Printer name: FaxCore PCL Printer | |
| Do you want to use this printer as the de \bigodot Yes | fault printer? |
| ⊙ N <u>o</u> | |
| | |
| | < <u>B</u> ack <u>N</u> ext > Cancel |

Give the printer a name – e.g. **FaxCore PCL Printer**.

| Print Test Page | | | | |
|----------------------------|---------------------|----------------------|-----------------|---|
| To confirm that the printe | er is installed pro | pperly, you can prir | nt a test page. | Ś |
| Do you want to print a te | st page? | | | |
| OYes | | | | |
| ⊙ Ng | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Select **No** to print a test page.

| | Completing the Add Printer Wizard You have successfully completed the Add Printer Wizard. You specified the following printer settings: | | |
|-------|--|-----------------------|--|
| | | | |
| Name | e: | FaxCore PCL Printer | |
| Share | e name: | <not shared=""></not> | |
| Port: | | IP_192.168.2.52 | |
| Mode | el: | HP LaserJet 5 | |
| Defa | ult | No | |
| Test | page: | No | |
| Tocl | ose this (| wizard, click Finish. | |
| | | K Back Finish Cancel | |

Click **Finish**. You have completed the installation of the FaxCore PCL printer.

Working with Blacklist Publications & Subscriptions

FaxCore allows administrators to create Blacklist publications to block users/domains from sending to a certain fax numbers/destinations. The following steps are needed to enforce blacklist publications for users/domains.

- 1) Create a Blacklist publication with a list of blacklist numbers.
- 2) Subscribe users to the intended Blacklist publication

Create a Blacklist Publication

Navigate to Global Settings > Blacklist Publication and select "New" button.

| Clobal Settings > Blacklist Publication > Create New Entry Back | | | | | | | |
|---|------------------|--------|--------|---|--|--|--|
| Blacklist Publication | | | | | | | |
| * Name : | DO NOT DIAL LIST | | | | | | |
| Creator : | WES | | | | | | |
| Description : | | | | | | | |
| Activate : | Yes | | | | | | |
| Assign Method : | Inbound | | ~ | | | | |
| | | | | | | | |
| New 🖹 C | | Search | | Q | | | |
| DIAL STRING ↓ | | | ACTIVE | | | | |
| 999 | | | 0 | * | | | |
| 991 | | | 0 | | | | |
| | | | | | | | |
| | | | | | | | |

Give the Blacklist publication a name, example: "Do Not Dial list"

On the Dial String field, enter the numbers that you want on the blacklist and click "New", example "991, 999, etc."

"*" (wildcard) is not supported. FaxCore compares the dial string from left to right only (numbers starting with the Dial String)

Blacklisted Dial String: 999 User Input Dial String: 9991114444 Match Blacklist: Yes

You can add as many numbers you wish to block to the list.

Next, click "Save & Close" when done adding numbers to the blacklist.

Subscribe Users to a Blacklist Publication

1. Navigate to **Domain Settings > Blacklist Subscription**

| Global Settir | ngs > Blacklist Publ | lication | | | | |
|---------------|----------------------|----------|-----------------|---------|-------------|---|
| + 8 | C | | | Search | | ٩ |
| | ACTIVE | ТҮРЕ | NAME | CREATOR | DESCRIPTION | |
| | Ø | Inbound | DO NOT DIAL UST | WES | | * |

2. Click on the subscribe icon as shown on the figure above to subscribe users/domains to the Blacklist publication.

| Domain Settings > Blacklist Subsc | Save | Back | | | |
|-----------------------------------|----------------------------------|----------------------|-------------------|------------------|---|
| ✓ SYSTEM | Subscribe to this publication (A | II new users will be | e subscribed to t | his publication) |) |
| Bruce Domain Connectis | Not Subscribe Search | م Su | bscribed | Search | Q |
| DougsTest | 🗆 Al Johnson | * • | | | |
| > — | [AJOHNSON@ COM] | | | | |
| | Chisholm Tucker [CTUCKER] | ++ | | | |
| FAXCORE AD | Chris Kaiser [CKAISER] | 44 | | | |
| > FaxFinder | Chris Kaiser [CKAISERGOOGLE] | | | | |

- 3. You have the option to either select domains from the left pane, or certain users from the right pane to subscribe to the intended blacklist.
- 4. Click "Save and Close" when done selecting users for the subscription.
- 5. Users subscribed to the Blacklist publication will now be blocked from sending to the numbers listed in the publication.

Working with Tracking Keys

FaxCore Tracking keys enables users to input tracking keys to inbound and outbound faxes to search, track and manage faxes.

By default, users can enter a tracking key for every fax they send or receive as shown below:

| New Message | | | |
|---|--------|-----------------------|--------------------|
| 1 Sender Info | | 2 ocuments | 3 Add Recipient |
| • From | | Subject | |
| test | | | |
| Company | | Notes | |
| FaxCore, Inc. | | | |
| Priority | | | |
| High | \sim | | |
| Additional Settings | | | |
| Delay Until (Date & Time) | | Billing Code | |
| | | | |
| Tracking Info | Т | Notification Informat | tion |
| Tracking No. | | 🗹 Notify me on messa | ige success |
| | | 🗸 Notify me on messa | ige failure |
| | | Notify me in summa | ary |
| | | Hold for preview | |

However, this tracking function can be extended and manipulated by administrators to:

- 1) Allow more tracking keys to be entered.
- 2) Force user to input a tracking key.
- 3) Force the type of data to input. (Text, numeric, alphanumeric, alphabetic, etc.)

Administrators can also create tracking dictionaries to allow users to choose tracking values from a drop-down list.

Create additional Tracking Keys

| Navigate to Domain Settings | s > Tracking | Config and select "+" | |
|------------------------------------|--------------|-----------------------|--|
|------------------------------------|--------------|-----------------------|--|

| Edit Entry | | × |
|-------------------------|-----------------------------|---|
| Tracking Key | | |
| * Display Label : | CUSTOMER ID | |
| Data Format : | Freeform Text \lor | |
| Length Set (Min) : | 0 | |
| Length Set (Max) : | 254 | |
| Is Required : | No | |
| Activate : | Yes | |
| Validating Dictionary : | Customer ID List 1 (SYSTEM) | |
| | Save And Close Reset | |

Enter a name for the Tracking Key that would display to the users, example: "Customer ID".

The other fields are optional. Modify/change as necessary, descriptions for each fields are provided in the table below:

| Fields | Description | |
|-----------------------|---|--|
| Data Format | Specify what type of data is allowed for user's input | |
| Length Set (Min) | Minimum number of characters for input | |
| Length Set (Max) | Maximum number of characters for input | |
| Is Required | Specify if user's input is mandatory | |
| Activate | Specify if the tracking key is activated | |
| Validating Dictionary | Specify a Tracking Dictionary for users to choose values from a drop-down list. | |

Click "Save and Close" when done.

Users within the domain where we created the tracking key should be able to enter the new tracking key we've configured.

| New Message | |
|---------------------------|--------------------------------|
| Sender Info Add | 2 3 Documents Add Recipient |
| • From | Subject |
| Company | Notes |
| FaxCore, Inc. | |
| Priority | |
| High V | |
| • Additional Settings | |
| Delay Until (Date & Time) | Billing Code |
| | |
| Tracking Info | Notification Information |
| Tracking No. | V Notify me on message success |
| | ✓ Notify me on message failure |
| CUSTOMER ID | Notify me in summary |
| | Hold for preview |

By default, the maximum number of tracking keys allowed per domain is set to 3. This value can be changed by navigating to **Domain Settings > Domain Settings > Message Setting**

| = 📑 system 🗸 | | | | 🌲 上 🔞 |
|--|---------------------------------------|--|------------|----------------------------|
| 🄇 Global Settings 🛛 < | Domain Settings > Domain Settings | | Save Apply | All Keep All Local Setting |
| | Message Settings | | | |
| Omain Settings 🗸 🗸 | Approval User : | | | |
| Domain Settings | | | | |
| User Permission | Maximum Tracking Key : | 3 | \sim | |
| Directory Sync | Notification Delivery Templates | | | |
| Fax Settings | Send Delivery : | | | |
| SMTP Relay Settings | | delivery (SYSTEM) | ~ | |
| Tracking Config | Message Send Success : | notifyMessageSendSuccess (SYSTEM) | ~ | |
| Tracking Dictionary Black List Subscription | Message Send Error : | notifyMessageSendFailed (SYSTEM) | ~ | |
| - | Message Send Summary : | notifyMessageSendSummary (SYSTEM) | ~ | |
| | Message Receive Success : | notifyMessageReceiveSuccess (SYSTEM) | ~ | |
| 🗞 Network Settings < | Message Receive Error : | notifyMessageReceiveFailed (SYSTEM) | \sim | |
| 🖽 Utilities 🗸 | Recipient Receive Success : | notifyRecipientReceiveSuccess (SYSTEM) | \sim | |
| Help & Support < | Recipient Receive Error : | notifyRecipientReceiveFailed (SYSTEM) | ~ | |
| | Message Assign Receive Notification : | notifyMessageAssignReceive (SYSTEM) | ~ | |

Create Tracking Dictionary

| acking Details | | | |
|-------------------|--------------------|---------------|------------|
| | | mer ID List 1 | |
| | Visiblity : Public | : | \sim |
| | Active : Yes | | |
| ictionary Entries | | | |
| + = C | | Search | |
| ENTRY NAME | | ENTRY VALUE | ENTRY TYPE |
| Customer 1 | | 10001 | Normal |
| Customer 2 | | 10002 | Normal |
| Customer 3 | | 10003 | Normal |
| | | | |
| | | | |
| | | | |

Navigate to Domain Settings > Tracking Dictionary and click on "+"

- 1. Enter a name for the Tracking Dictionary, example: "Customer ID list".
- 2. Choose the domain for this Tracking Dictionary to be created for and Set the Visibility to "Public".
- Enter the Entry Name (Value to display to user) and the Entry Value (actual Value stored for the tracking key). Entry Type can be a normal text or auto-number (incremental numbers). Click on "+" to add the entry. Repeat this step to keep adding additional entries to the list.
- 4. Click on "Save" when done adding entries to the list.
- To associate the newly created Tracking Dictionary to a Tracking Key, navigate to Domain Settings > Tracking Key. Click on the Tracking Key you want to associate the Tracking Dictionary to edit the

Tracking Key.

| Domain Settings > Tracking Dictionary > Edit Entry | Save | Back |
|--|------------------------|----------------|
| Tracking Details | | |
| * Name : | Customer ID List 1 | |
| Visiblity : | Public V | |
| Active : | Yes | |
| Dictionary Entries | | |
| + = C | Search | ٩ |
| ENTRY NAME | ENTRY VALUE ENTRY TYPE | |
| Customer 1 | Normal | |
| Customer 2 | Normal | |
| | | |
| | | |
| | | |
| | | Ψ |
| H I → H I5 ▼ items per page | | 1-2 of 2 items |

- 6. Select the Tracking Dictionary we've created earlier as the Validating Dictionary and then "Save".
- 7. Now, when user's send a fax, they will be able to choose the values of the Tracking Dictionary from a drop-down list.

| | | | 🌲 🚑 🔮 |
|-----------------------|-----------------------------|---|---------------|
| 🖻 New 🗸 🗸 | - | | |
| Message | Sender Info • From | Add Documents Subject | Add Recipient |
| | | | |
| | Company FaxCore, Inc. | Notes | |
| 🗖 Messages 🛛 < | Priority | | |
| Address Books < | High • Additional Settings | · · · · · · · · · · · · · · · · · · · | |
| Documents < | | Billing Code | |
| ≗ ₀ Settings < | Tracking Info Customer 1 | Notification Information | |
| 🕍 Report | Customer 2 | ✓ Notify me on message succes ✓ Notify me on message failure | |
| | Customer 3 Customer 1 | Notify me in summary | |
| | | Hold for preview | |
| | | | Previous Next |

FaxCore Notifications

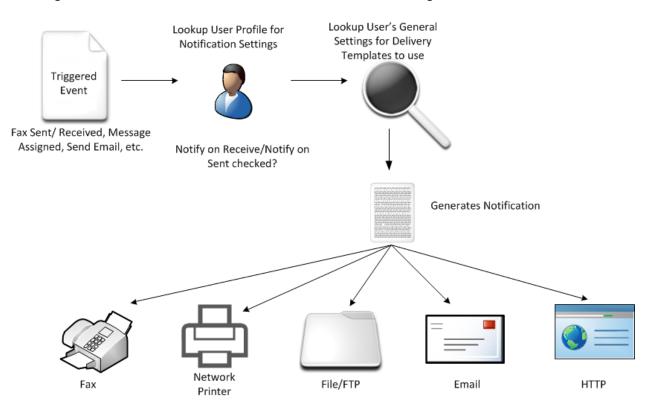
FaxCore can notify users when the following events happen:

- Send delivery
- Message send success
- Message send error
- Message receive success
- Message receive error
- Recipient receive success
- Recipient receive error
- Message assign receive
- Message forward receive
- Send password
- Message print
- Approval request
- Approved reply
- Rejected reply

Notification Types

Notification can occur in a number of ways:

| Notification Type | Description | | |
|-------------------|-------------------------------------|--|--|
| File | Drops file to a folder | | |
| FTP | Drops file to a FTP address | | |
| нттр | Submits a HTTP POST to an URL | | |
| Email | Sends an email to an email address | | |
| Printer | Prints the fax to a Network Printer | | |
| Fax | Forwards the fax to a Fax number | | |



The diagram below illustrates the workflow of FaxCore notification engine:

Delivery Templates

Each of the notification types listed above has its own distinct set of properties that control processing and formatting of the delivered message. For example, email deliveries contain a subject, body, and importance, while ftp deliveries must specify an upload directory and file name for each file transferred.

As their name implies, delivery templates are used to control how the protocol-specific properties of each delivery are set and/or formatted. Delivery templates are created and owned by a domain and have the following characteristics:

- Each template is owned by a single domain and can be visible to child domains based on its **Visibility** setting.
- Each template contains configuration setting for every supported protocol.
- An unlimited number of templates can be created
- Templates can be assigned at the domain level and also at a user level, giving you precise control how delivery message appear. Only a domain administrator can create and assign templates.

Delivery templates are not visible to users. Only system and domain administrators can configure or modify the templates.

Configuring Delivery Templates

To specify which template is used for various types of notifications, navigate to Domain Settings >

| SYSTEM | × | | 🌲 🚑 📀 |
|-----------------------|--|-----------------------|------------------|
| 😧 Global Settings 🛛 < | Domain Management > Delivery Templates | | |
| 🗱 Domain Settings 🛛 < | + 🖹 C Move to : | ∨ Search | ٩ |
| 🖶 Domain Management 🗸 | □ NAME | DATE CREATED | VISIBILITY |
| | delivery | 10-29-2009 07:09:49 A | Public |
| Domain Info Users | notifyMessageApprovalNotApproved | 10-29-2009 07:09:49 A | Public |
| Groups | notifyMessageApprovalRequest | 10-29-2009 07:09:49 A | Public |
| Address Books | notifyMessageAssignReceive | 10-29-2009 07:09:49 A | Public |
| Domain Documents | notifyMessageForwardReceive | 10-29-2009 07:09:49 A | Public |
| Delivery Templates | notifyMessageReceiveFailed | 10-29-2009 07:09:49 A | Public |
| | notifyMessageReceiveSuccess | 10-29-2009 07:09:49 A | Public |
| ∾ Network Settings < | notifyMessageReceiveSuccessDoug | 08-06-2020 01:35:38 P | Public |
| ₩ Utilities < | notifyMessageReceiveSuccessPekin | 08-06-2020 11:06:29 A | Public |
| | notifyMessageReceiveSuccessUnassigned | 04-20-2020 04:50:24 P | Private |
| Help & Support < | notifyMessageSendFailed | 10-29-2009 07:09:49 A | Public |
| | notifyMessageSendFailedPekin | 09-02-2020 09:43:38 A | Public |
| | | 10-20-2000.07:00:40.A | Public 🔻 |
| | I 2 F H 15 V items per page | | 1-15 of 23 items |

Domain Settings and scroll down to Notification Delivery.

Note: User's Settings takes precedent over Domain Settings. To change a specific user's Delivery Templates, navigate to **Domain Management > Users**, select the domain where the user resides, double click on the user and navigate to the **General Settings** tab and scroll down to **Notification Delivery**.

| Domain Management > Users > Edit Entry | | Save Reset Back |
|---|---|-----------------|
| User Profile General Settings Fax Settings Permission | SMTP Relay | |
| Notification Delivery Templates | | • |
| Send Delivery : | delivery (SYSTEM) | |
| Message Send Success : | notifyMessageSendSuccess (SYSTEM) | |
| Message Send Error : | notifyMessageSendFailed (SYSTEM) | |
| Message Send Summary : | notifyMessageSendSummary (SYSTEM) | |
| Message Receive Success : | notifyMessageReceiveSuccessPekin (SYSTEM) | |
| Message Receive Error : | notifyMessageReceiveFailed (SYSTEM) | |
| Recipient Receive Success : | notifyRecipientReceiveSuccess (SYSTEM) | |
| Recipient Receive Error : | notifyRecipientReceiveFailed (SYSTEM) | |
| Message Assign Receive Notification : | natifyMessageAssignReceive (SYSTEM) | |
| Message Forward Receive Notification : | notifyMessageForwardReceive (SYSTEM) | |
| Reset Password Notification : | sendPassword (SYSTEM) | |
| Message Print Template : Approval Request Notification : | delivery (SYSTEM) | |
| Approval Request Notification . | -NONE- V | • |

Description of Notification Events

| NotificationDescriptionEvent/Actions | | Notification Recipient |
|--------------------------------------|--|------------------------|
| Send delivery | Template is used for messages sent with the User Interface or SDK to Email, HTTP, FTP, File and Printer (not applicable to Fax and Raw Fax) | Recipient |
| Message send success | User sends a message successfully. | FaxCore User |
| Message send error | User sends a message with a failure/errors | FaxCore User |
| Message receive success | User receives a fax/a fax is routed to the user successfully | FaxCore User |
| Message receive error | User receives a fax with failure | FaxCore User |
| Recipient receive success | Recipient receives a fax successfully | Recipient |
| Recipient receive error | Recipient receives a fax with errors | Recipient |
| Message Assign receive notification | User is assigned a fax | FaxCore User |
| Message forward receive notification | User is forwarded a fax | FaxCore User |
| Send password notification | User requested re-send of password by clicking on "Forgot Password" link | FaxCore User |
| Message print template | User prints to a network printer | Printed Document |
| Approval request notification | Approval required for a fax | FaxCore Approval User |
| Approved reply notification | A fax is approved | FaxCore User |
| Rejected reply notification | A fax is not approved | FaxCore User |

Creating Delivery Templates

FaxCore provides default delivery templates for each notification event. However, Administrators might want to create new delivery templates for specific users or domains without overwriting the default templates.

To create a new delivery template, navigate to **Domain Management > Delivery Templates** and click on the + button:

Enter the field for each delivery types (Fax, Email, HTTP, FTP, File, and Print)

| Domain Management > Delivery Templates > Create New Entry Reset Back | | | | | | |
|--|-------------------|--------------|----------|-----|--|--|
| Template General Infomation | | | | | | |
| * Name : | | Domain : | SYSTEM | | | |
| Description : | | Visibility : | Private | ~ | | |
| Fax Email HTTP FTP File Print | | | | | | |
| Border Text 1 : | | Location : | Top-Left | ~ ^ | | |
| Border Text 2 : | | Location : | Top-Left | ~ | | |
| Border Text 3 : | | Location : | Top-Left | ~ | | |
| Border Text 4 : | | Location : | Top-Left | ~ | | |
| Subject : | | | | | | |
| Notes : | | | | | | |
| | | | | | | |
| | | | | | | |
| Cover Page : | Default CoverPage | | | ~ | | |
| Include Fax As Attachment : | No | | | | | |
| Priority : | Lowest | | | ~ | | |
| Send Using User Profile : | No | | | • | | |

Description of each Notification Type

Fax

| Field | Description | Sample Data: |
|------------------------------|--|--|
| Subject | Cover Page Subject for the fax | Fax Received: \$\$MESSAGE.ID\$\$ |
| Notes | Cover Page Notes for the fax | A fax has been received with Message ID: \$\$MESSAGE.ID\$\$ |
| Cover Page | Cover Page to use with the fax | Select from Drop Down List |
| Include Fax as Attachment | Specifies whether to attach the fax as an attachment | Yes/No |
| Priority | Submits the fax with Low, Medium or High Priority | Low/Medium/High |
| Send Using User Profile | Specifies whether to send the fax to the FAX address in the user's profile | Yes/No |
| Fax Address | Only available if "Send Using User profile" is set to "NO", this field allows Administrators to specify a fax number or a message token. | \$\$MESSAGE.XSACT.XM IT.CALLER_ID\$\$ |
| Send As Raw | Specify whether to send the fax as Raw | Yes/No |

Email

| Field | Description | Sample Data: |
|--------------------|-------------------------------|--|
| From | From Address for the Email | \$\$CONFIG.GENERAL.NOTIFICATION_FROM\$\$ |
| Subject | Subject line for the Email | Fax Received: \$\$MESSAGE.XSACT.XMIT.REMOTE_CSID\$\$ |
| Image File Name | Attachment file name | <pre>\$\$MESSAGE.XSACT.TRANSACTION_ID\$\$.\$\$MESSAGE.XSAC T.ADDRESS_FORMAT_TYPE\$\$</pre> |

| Body | Email | Delivery Information: | | | |
|--------------|-------|-----------------------|--|--|--|
| body/content | | Message #: | \$\$MESSAGE.NUMBER\$\$ | | |
| | | Remote CSID: | \$\$MESSAGE.XSACT.XMIT.REMOTE_CSID\$\$ | | |
| | | Total Pages: | \$\$MESSAGE.XSACT_PAGE_COUNT\$\$ | | |
| | | Receive Time: | \$\$MESSAGE.DATE_TIME\$\$ | | |
| | | Transmit Time: | \$\$MESSAGE.XSACT.XMIT_TIME\$\$ | | |

HTTP

| Field | Description | Sample Data: |
|------------------------|--|---|
| Image File Name | Filename of the image to post | <pre>\$\$MESSAGE.XSACT.TRANSACTION_ID\$\$.DOCUMENT.\$\$MES SAGE.XSACT.ADDRESS_FORMAT_TYPE\$\$</pre> |
| Report Query String | String to include with the HTTP Post | ?MsgID=\$\$MESSAGE.ID\$\$&TrackingKey=\$\$MESSAGE.TRA CKING_KEY\$\$ |
| Report Body | Txt file to include with the HTTP POST | \$\$MESSAGE.ID\$\$ complete |

FTP/File

| Field | Description | Sample Data: |
|---------------------|--|--|
| Image File Name | Filename of the image to post | <pre>\$\$MESSAGE.ID\$\$.\$\$MESSAGE.XSACT.ADDRESS_FORMAT_T YPE\$\$</pre> |
| Report File Name | String to include with the HTTP Post | \$\$MESSAGE.ID\$\$.txt |
| Report Body | Txt file to include with the HTTP POST | \$\$MESSAGE.ID\$\$ complete |

| Field | Description | Sample Data: |
|---------------------|--|---|
| Border Text | Text to print on the border of every page on the printed document | |
| Print With | Specify whether to print the document with Banner Page, Attachment or Both | |
| Banner Body Page | Content/Body of the Banner page to print | Message #: \$\$MESSAGE.NUMBER |

Print

Working Scenarios of FaxCore Delivery Templates

Scenario: To setup all inbound faxes to drop as a PDF file along with a TXT file to a folder (C:\Infax) on the FaxCore server.

Notification Event: Message receive success Delivery Template: MessageReceiveSuccess (SYSTEM) User: SYS-UNROUTED

Step 1: Navigate to **Domain Management > Delivery Templates** and click on **MessageReceiveSuccess** template. Navigate to File tab and enter the field as following:

Image File Name: **\$\$MESSAGE.ID\$\$.\$\$MESSAGE.XSACT.ADDRESS_FORMAT_TYPE\$\$** Report File Name: **\$\$MESSAGE.ID\$\$.TXT** Report Body: **Message Received: \$\$MESSAGE.ID\$\$**

| Domoin Management. > Delivery Templotes. > Edit Entry Save Reset Back | | | | | | |
|---|------------------------------|--|-------------------------------|-------------------|-----|--|
| Template General Infom | Template General Information | | | | | |
| * Name : | notifyMessageReceive | Success | Domain : | SYSTEM | | |
| Description : | notifyMessageReceive | Success | Visibility : | Public | ~ | |
| Fax Email HTTP | FTP File Print | | | | | |
| Border Text 1: | | | Location : | Top-Left | ~ ^ | |
| Border Text 2 : | | | Location : | Top-Left | ~ | |
| Border Text 3 : | | | Location : | Top-Left | ~ | |
| Border Text 4 : | | | Location : | Top-Left | ~ | |
| Image File Name : | | \$\$MESSAGE.XSACT.TRANSACTION_ID\$\$.DOCUM | IENT.\$\$MESSAGE.XSACT.ADDRES | S_FORMAT_TYPE\$\$ | | |
| Report File Name : | | \$\$MESSAGE.ID\$\$.TXT | | | | |
| Report Body : | | Message Received: \$\$MESSAGE.ID\$\$ | | | | |
| | | | | | | |

User General Settings:

| Domain Management > Users > Edit Entry | | Save Reset | Back |
|---|--------------------------------------|------------|----------|
| User Profile General Settings Fax Settings Permission | SMTP Relay | | |
| Notification Delivery Templates | | | ^ |
| Send Delivery : | delivery (SYSTEM) | | |
| Message Send Success : | notifyMessageSendSuccess (SYSTEM) | | |
| Message Send Error : | notifyMessageSendFailed (SYSTEM) | | |
| Message Send Summary : | notifyMessageSendSummary (SYSTEM) | | |
| Message Receive Success : | notifyMessageReceiveSuccess (SYSTEM) | | |

User Profile:

| in Managerr | nent > Users > EditE | ntry | | | | | Save | Reset | Back |
|-------------|----------------------|--------------|---------------|-----------------|-----|--------------------------|------|-------|------|
| er Profile | General Settings | Fax Settings | Permission | SMTP Relay | | | | | |
| | | | Is Active : | Yes | | | | | |
| | | Dis | play Name : | System-Unrouted | | | | | |
| | | | First Name : | System | | | | | |
| | | | Last Name : | Unrouted | | | | | |
| | | Preferred Ad | dress Type : | Email | | | ~ | | |
| | | C | Description : | | | | | | |
| + 8 |] | | | | | | | | |
| | NOR | NOS | PRIMARY | ADDRESS T | YPE | ADDRESS | | | |
| | | | | EMAIL | | sys-unrouted@faxcore.com | | | - |
| | V | | v | File | | C:\Infax\ | | | |
| | | | | | | | | | |

Upon completion of the above steps, all inbound faxes will have a copy of the fax dropped to C:\Infax\

| \leftarrow \rightarrow \checkmark \uparrow \blacksquare > This PC > Local Disk (C:) > Infax | | | | | |
|---|-------------------|---------------------|--------------------|------|--|
| OneDrive | Name | Date modified | Туре | Size | |
| | 2020102828 | 10/28/2020 11:52 AM | File | | |
| This PC 3D Objects Desktop | 12 2020102828.pdf | 8/15/2020 10:32 PM | Adobe Acrobat Docu | 51 | |

Working with Address Books

User Private Address Books

Users can create their own Address books from the FaxCore Web User Interface. Refer to <u>FaxCore User</u> <u>Manual</u> for more information on how users can setup their Private Address books.

Global/Public Address Books

Administrators can setup Global/Public address books that are shared across users within a certain domain or system-wide.

The supported Address Book types are:

- 1) External loads data from an external source such as an Excel, CSV or Excel file, SQL database or any ODBC connection.
- 2) Internal Creates an internal FaxCore address book that stores contacts on FaxCore Database.
- 3) Exchange Public Address Book.

This section will provide information on how to setup the above mentioned address books.

External Address Books

Navigate to Domain Management > Address Books and select "+"

Load external contact data from CSV file

| Domain Management > Address Books > Create New Entry | | Sove Test | Read Data F | leset Back |
|--|---|-----------|-------------|------------|
| Select Domain | | | | |
| Configure for Domain : | SYSTEM | | | |
| Address Book Editor | | | | |
| * Address Book Name : | | | | |
| Description : | | | | |
| Visibility: | Private | | | |
| Address Book Type : | External | | | |
| Connection Type : | OleDb Connection | | | |
| * Connection String : | Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\;Extended Properties="text;HDR=Yes;FMT=Delimited"; | | | |
| | | | | |
| * Query Expression : | SELECT DisplayName as xDisplayName, CompanyName as xCompanyName, Fax as xAddress FROM Contacts_01_CSV.csv | | | |
| | | | e | |
| | * the variables gusername can be used in query expressions to limit the query. | | | |
| | Eg: select * from tcontacts where xName like @username | | | |
| @username : | | | | |
| @filter: | | | | |
| | * grusername is used for read data from external address book. | | | |
| | Changes on this field will not be saved. | | | |

Enter an Address Book Name for the address book (example, CSV Address Book)

Change the following settings:

Visibility = Global Address Book Type = External Connection Type = OleDb Connection

Connection String:

```
Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\;Extended
Properties="text;HDR=Yes;FMT=Delimited";
```

Note: The above connection string assumes the CSV file(s) that we're loading is located in C:\addressbooks\ of the FaxCore server. If the CSV(s) are located in a different folder, change the value of "Source=" in the connection string.

Query Expression:

```
SELECT DisplayName as xDisplayName, CompanyName as xCompanyName, Fax as xAddress FROM Contacts 01 CSV.csv
```

Note: The above Query expression assumes the CSV file name we're loading is "dbAddressBook.csv" that contains the headers, DisplayName, CompanyName, Fax.

| | А | В | С | D | E | F |
|---|-------------------|-----------|------------|-----------|-------------|----------------|
| 1 | DisplayName | FirstName | MiddleName | LastName | CompanyName | Desc |
| 2 | Koch Christine | Koch | КС | Christine | Faxcore 1 | Prototype Data |
| 3 | West Paul | West | WP | Paul | Faxcore 2 | Prototype Data |
| 4 | Clark Molly | Clark | CM | Molly | Faxcore 3 | Prototype Data |
| 5 | Sprenger Christof | Sprenger | SC | Christof | Faxcore 4 | Prototype Data |
| 6 | Schleger Yvonne | Schleger | SY | Yvonne | Faxcore 5 | Prototype Data |
| 7 | Nash Mike | Nash | NM | Mike | Faxcore 6 | Prototype Data |

Replace this value with the actual CSV you want to load contacts from and DisplayName, CompanyNAme and Fax with the actual headers from the actual CSV file.

Click on "Test" to test the connection with the CSV file. Successful result should return "Connected"

| Domain Management > Address Books > Create New Entry | | | Save | Test | Read Data | Reset | Book |
|--|--|--|------|------|-----------|-------|------|
| Select Domain | | | | | | | |
| Configure for Domain : | SYSTEM | | | | | | |
| Address Book Editor | | | | | | | |
| * Address Book Name : | test | | | | | | |
| Description : | | | | | | | |
| Visibility : | Private | | | | | | |
| Address Book Type : | | | | | | | |
| Connection Type : | | | | | | | |
| * Connection String : | | d Properties="text;HDR=Yes;FMT=Delimited"; | | | | | |
| | Good job! | | | | | | |
| * Query Expression : | External source is connected successfully. | | | | | | |
| query expression. | ОК | xCompanyName, Fax as xAddress FROM Contacts_01_CSV.csv | | | | | |
| | | | | | C | | |
| | * the variables gusername can be used in query express | ions to limit the query. | | | | | |

Click on "Read Data" to check if the data are read correctly.

Finally, click "Save & Close"

Load external contact data from Microsoft Access file

The steps to create an External Address book with a Microsoft Access file are similar with a CSV file. The difference is on the Connection String and Query Expression.

| Domain Management > Address Books > Create New Entry | Sove Test Read Data | Reset Back |
|--|---|------------|
| Select Domain | | |
| Configure for Domain : | SYSTEM V | |
| Address Book Editor | | |
| * Address Book Name : | DiternalAddressBook | 1 |
| Description : | | |
| Visibility: | Public v | |
| Address Book Type : | External v | |
| Connection Type : | OleDb Connection v | |
| * Connection String : | Provider=Microsoft.Jet.DLEDB.4.0;Oata Source=C:\externalAddressBook.mdb | |
| | | |
| * Query Expression : | SELECT A as x0isplayName, E as xCompanyName, Q as xAddressTypeD, H as xAddress, G as xNotFyAddress, R as xISRRON, S as xISRRON ROM importContactTable | |
| | * the variables glusername can be used in query expressions to limit the query. | |
| | * the variables gluserhame can be used in query expressions to innit the query. Eg: select * from tcontacts where itName like gluserhame | |
| giusername : | | |
| @filter : | | |
| | * gusername is used for read data from external address book. | |
| | Changes on this field will not be saved. | |

Connection String:

Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\externalAddressBook.mdb;

Note: The above connection string assumes the Microsoft Access MDB file that we're loading is located in C:\ of the FaxCore server. If the MDBs are located in a different folder, change the value of "Source=" in the connection string.

Query Expression:

```
SELECT A as xDisplayName, E as xCompanyName, Q as xAddressTypeID, H as xAddress, G as xNotifyAddress, R as xIsRRSOn, S as xIsRRFOn FROM importContactsTable
```

Note: The above Query expression assumes the MDB file we're loading contain a "importContactsTable" table that contains the following column A, E, H.

| | importContacts | Table | | | | | | | | | | | |
|----|----------------|--------------|-------------|----|---|---|-----------|---|--------------|------|----|---|---|
| L. | ID 👻 | А | ▼ B | * | С | Ŧ | D | Ŧ | E | Ŧ | | F | - |
| | 2 | James May | James | JM | 1 | | May | | Faxcore Cent | tral | TG | | |
| | 3 | Jason Plato | Jason | JP | | | Plato | | Faxcore Cent | ral | FG | | |
| | 4 | Jeremy Clar | ksc Jeremy | JC | | | Clarkson | | Faxcore Cent | ral | TG | | |
| | 5 | Jon Bentley | Jon | JB | | | Bentley | | Faxcore Cent | ral | FG | | |
| | 6 | Richard Ham | nmi Richard | RH | ł | | Hammond | | Faxcore Cent | ral | TG | | |
| | 7 | Tiff Needell | Tiff | TN | 1 | | Needell | | Faxcore Cent | ral | FG | | |
| | 8 | Tom Ford | Tom | TF | | | Ford | | Faxcore Cent | ral | FG | | |
| | 9 | Vicki Hende | rsc Vicki | VH | ł | | Henderson | | Faxcore Cent | ral | FG | | |

Load external contact data from SQL server

| omain Management > Address Books > Create New Entry | Bove Test Read Data Reset | Back |
|---|---|------|
| Select Domain | | |
| Configure for Domain : | SYSTEM V | |
| Address Book Editor | | |
| duress book Editor | | |
| * Address Book Name : | SQL ADDRESS BOOK | |
| Description : | | |
| Visibility: | Public V | |
| Address Book Type : | Eternal V | |
| Connection Type : | OleDb Connection V | |
| * Connection String : | Provider=sqloledb;Data Source=SqLProdDl;Initial Catalog=dbAddressbook;User Id=fxc_admir;Password=#########; | |
| | | |
| * Query Expression : | select share as xDisplayhame, xCompany as xCompanyName, xFax as xAddress from xContacts where share like (@filter + %) order by share | |
| | | |
| | e de la companya de l | |
| | * the variables gusername can be used in query expressions to limit the query. | |
| | Eg: select * from tcontacts where xName like @username | |
| @username : | | |
| gofilter : | | |
| | * gusenname is used for read data from external address book. | |
| | Changes on this field will not be saved. | |
| | | |

Connection String:

```
Provider=sqloledb;Data Source=SQLProd01;Initial Catalog=dbAddressbook;User
Id=fxc admin;Password=########;
```

Note: The above connection string assumes the SQL Server hostname is '**SQLProd01**' and we're connecting to the SQL server with username 'fxc_admin' and password 'fxc_admin@pwd' . If the change the value of "Data *Source=*" in the connection string to point to the actual SQL server hostname and replace 'User Id' and 'Password' with the actual login credentials to the server.

Query Expression:

```
select xName as xDisplayName, xCompany as xCompanyName, xFax as xAddress from
zContacts where xName like (@filter + '%') order by xName
```

Note: The above Query expression assumes the SQL server contains a "zContacts" table that contains the following column xName, xCompany, xFax.

| SQLPROD01.dbA dbo.zContacts SQLPROD01.dbA dbo.zC | | | | | | | |
|--|----------|---------------|----------------|--|--|--|--|
| | ×Name | xCompany xFax | | | | | |
| | John Doe | Contoso | 1-555-444-1234 | | | | |
| | Jane Doe | Contoso | 1-222-333-4444 | | | | |
| ▶* | NULL | MAL | NULL | | | | |

Importing Contacts from CSV

System administrators and users can import contacts from an external data file into a Global/Public FaxCore user address book. The import utility

- Allows the import of contacts into one or more distributed groups
- Allows the specification of common default values for fields not present in the external data file
- Supports any line-delimited flat file format, with support of XML data file in a future release.

To use this functionality, navigate to **Utilities > Import Contacts**.

| Utilities > Import Contacts | | Import | Reset |
|-----------------------------|------------------------------------|--------|-------|
| Import Specification | | | |
| * Import to Account : | | | |
| * Import File : | Â | | |
| | Drag and drop a file here or click | | |
| Delimiter Format : | CSV Delimited | ~ | |

Import Specification

This section lets you identify the user who owns the contact and to specify the import file and its format.

Use the **Browse** button next to the **Import File** input field to specify the file. For the format of the file, you can use the default format defined by FaxCore, or you can specify your own format. In the **Header Format** input field, select **FaxCore Default Import Header** to use the FaxCore default, or **Custom Header** to use your own format. If you select **Custom Header**, a new input field, **Control File**, appears with a **Browse** button that lets you point to the file in which you have defined your custom layout.

The FaxCore default layout header format specifies that the input fields are to be listed in the following order:

DisplayName, FirstName, MiddleName, LastName, CompanyName, Desc, Email, Fax, Http, Ftp, File, Printer, Mobile, FaxRaw, Phone, CSID/CallerID

Where the fields have the following meanings:

| Data Field Name | Description |
|-----------------|-------------------------|
| DisplayName | Contact's display name. |

| Data Field Name | Description |
|-----------------|----------------------------|
| FirstName | Contact's first name. |
| MiddleName | Contact's middle name. |
| LastName | Contact's last name. |
| CompanyName | Contact's company name. |
| Desc | Contact's description. |
| Email | Contact's email address. |
| Fax | Contact's fax number. |
| Http | Contact's http address. |
| Ftp | Contact's ftp address. |
| File | Contact's file address. |
| Printer | Contact's printer. |
| Mobile | Contact's mobile number. |
| FaxRaw | Contact's raw fax number. |
| Phone | Contact's phone number. |
| CallerID/CSID | Contact's CallerID or CSID |

Suppose you create your own very simple control file that looks like this:

DisplayName, Email, Fax

Your import file might then look something like this:

DisplayName, Email, Fax John Smith, jsmith@clientcompany1.com, 1-123-123-4567 Helen Brown, hbrown@clientcompany1.com, 1-222-444-5555 Martha Jones, mjones@clientcompany2.com, 1-333-444-5555 Note the first row, which contains the names of the fields. This is optional. You can include it for your own guidance when entering data. However, if you do include that header row, be sure to select **Yes** in the **Has header** input field, so that FaxCore will ignore that first row.

Default Settings

In this section, you specify the following fields:

Address Book

Name of the new address book. The template name must be unique within the owning domain.

Contact Group

Name of the new group.

Contact Groups Description

Distribution group description if the contact group identified above is newly created during the import.

Contact Group View Only

Allow only group to view this contacts.

File Attachment Format

Default file attachment format for addresses.

Prefer Address Type

Primary delivery addresses type for the contact.

Visibility

Defines the visibility of the template to its sub domains. Setting to public allows the template to be used by sub domains.

Monitoring FaxCore

FaxCore Reports

You can generate the following reports online or in printed form:

- Activity Report
- Default Report
- Top 10 List

To access any of these reports, navigate to **Utilities > Reports** and then click the appropriate link on the right-hand side of the screen. A screen to let you select report parameters opens in a new window.

Creating the Report

The following applies to each of the reports:

You can use the **Export** dropdown to select from the following report formats:

- PDF
- CSV
- Excel
- RTF
- TIFF
- Web Archive

Click **Generate Report** to generate the report in your browser or the printer icon to send it to a printer.

Activity Report

On this screen, you can select a date range for the covered activity. You can use the **Report Selection** dropdown to select from the following list of activity reports:

- Total outbound
- Total inbound
- Average outbound/inbound

- Total by FaxCore user
- Total by billing code
- Total by barcode
- Total by destination
- Total by CSID
- Outbound port utilization %
- Inbound port utilization %

Default Report

Generates a list of transactions based on various criteria you select – e.g., Succeed, Failed, or Both.

Top 10 List

Generates a list of the top 10 senders or recipients for a specified date range.

FaxCore Queues

Message Queue

The Message Queue displays the real time status of tasks in the following queues:

- Fax
- Email
- HTTP
- FTP
- File
- Printer

To see these queues, navigate to **Network Settings > Message Queue** and then use the **Message Type** dropdown to select the queue you want to monitor.

Message Schedule

The Message Schedule displays the real time status of scheduled tasks in the following queues:

- Fax
- Email
- HTTP

Monitoring FaxCore

- FTP
- File
- Printer

To see these scheduled tasks, navigate to **Network Settings > Message Schedule** and then use the **Message Type** dropdown to select the queue you want to monitor.

Actions available on the Message Queue/Schedule:

| ≡ <mark></mark> system ~ | | | | | | | ≜ ≜ |
|--------------------------|----------------------------|---------|------------------|-----------------------|-----------|---------------|------------|
| 🕃 Global Settings 🛛 < | Network Settings > Message | Queue | | | | | |
| 🗱 Domain Settings 🧹 | C Message Type : | Fax | Actions | 5 minutes V | Search | | ٩ |
| 🛱 Domain Management < | MESSAGE NO | PAUSED? | Actions | MODULE SERVER | FAX AGENT | IS READY? PRI | ORITY |
| Domain Management < | | | Pause | No records available. | | | |
| 💑 Network Settings 🗸 🗸 | | | Resume | | | | |
| FaxAgent | | | Cancel | | | | |
| Message Queue | | | Purge | | | | |
| Message Schedule | | | Reschedule | | | | |
| | | | Reset | | | | |
| | | | Force Reschedule | | | | |
| 🚯 Help & Support 🛛 < | | | Force Reset | | | | |

Pause: Pause selected message(s)

Resume: Resume selected pause message(s)

Cancel: Cancel the selected message(s)

Purge: Deletes the selected message(s) from the message queue/schedule

Reschedule: Reschedules the selected message(s) to send at a later date/time

Reset: Resets the selected message(s). This will re-evaluate the outbound routing rule and dialing rules and reset the port assignment and re-apply dialing rules

Force Reschedule: Message(s) that has been processed and cannot be re-scheduled can be Force Reschedule with this action

Force Reset: Message(s) that has been processed and cannot be Reset can be Force Reset with this action.

Maintenance & House Keeping

Purging Records

As FaxCore data grows, it can affect the performance of the FaxCore server such as disk space constrains, database indexing and search speeds. Administrator should purge old records when possible.

FaxCore has a built-in Purge utility to purge old records to maintain database and data store size. To enable the Purge utility follow the steps below:

1. Navigate to Utilities > Purge Settings

| E SYSTEM | | | 🌲 🔺 🔮 |
|--------------------------|----------------------------------|----------------|----------------|
| 🚱 Global Settings 🛛 < | Utilities > Purge Settings | | Save Apply All |
| 🕵 Domain Settings 🛛 < | Purge Action : | Purge All Data | \sim |
| म्मू Domain Management < | * Start Purge At (am/pm) : | 00:00 ③ | |
| | * Purge data older than (days) : | 365 | |
| 🗞 Network Settings < | Enable Purge? : | Yes | |
| 🖽 Utilities 🗸 🗸 | Purge External Download Option : | Everything | ~ |
| Import Contacts | Last Purge Date : | | |
| Import Users | | | |
| Search Messages | | | |
| Search Users | | | |
| Audit Trail | | | |
| Reports | | | |
| Purge Settings | | | |
| Help & Support < | | | |

- 2. Select the Domain to configure the Purge Settings for. If configuring for all, select System.
- 3. Configure the field below:

Purge Action:

Purge All Data - This action will delete data from FaxCore Database and image files from FaxCore Document Store

Trim Messages - This action will only delete transactional records from FaxCore Database and leave image files intact.

Start Purge at (am/pm) – When to begin the schedule purge action.

Purge data older than – Deletes data older than in days

Enable? – Yes/No

 For safety reasons, by enabling the Purge Settings alone does not actually purge data from FaxCore. To enable purging, browse to the FaxCore install directory and locate the file
 DispatchAgent.exe.config (example: C:\FaxCore\svc.dispatcher\DispatchAgent.exe.config). Open up the file with a text editor such as Notepad and locate the following line: <add key="PurgeDebug" value="true"/>

- 5. Change the value from "true" to "false" to read: <add key="PurgeDebug" value="false"/>
- 6. Save and close the text editor and restart FXC6.Dispatcher service with Windows Services console. Purge settings are now fully enabled and the next purge will take place on the next scheduled time.

Note: Purging process does not happen instantly. FaxCore checks on the Purge Settings in a 30 minutes interval.

Backup & Restoring FaxCore SQL Database

The Database Backup Guide

This chapter describes the various methods available to begin creating and managing backups of your FaxCore SQL database.

SQL Server Management Studio - Express Edition

- 1. Launch the *SQL Server Management Studio Express* utility on your database server and authenticate yourself by providing the required credentials to establish a connection to your FaxCore database server.
- 2. Upon successfully authenticating, expand the *Databases* folder from within your object explorer panel to display the list of hosted database.
- 3. Right click your FaxCore database and select Tasks > Back Up to configure the available backup parameters for your database. Figure 1.0.0
- 4. Lastly select the Options page to append additional options to your database backup job. Figure 2.0.0

| 🥫 Back Up Database - fяс | | | | 📒 Back Up Database - fxc | | | |
|---------------------------------------|--|------|---------------------------|---|--|-------------------|--|
| Select a page | 🔄 Script 🝷 🚺 Help | | | Select a page | 🔄 Script 👻 🚺 Help | | |
| · · · · · · · · · · · · · · · · · · · | Source - Dejabase: Recovery model: Backup type: Copy Only Backup Backup component: C Database C Files and filegroups: Backup set - | Full | Add Eamove Contents | Select a page General Distorts Sever FCAFEV03Xdministrator FCAFEV03Xdministrator FCAFEV03Xdministrator FCAFEV03Xdministrator Programs Redy | Script - B Help Overwite media C Back up to the existing media set Append to the existing backup set C Append to the existing backup set C Deck media set name and backu Media set pane: Back up to a new media set, and era New media get name: New media get name: New media get cription: Relability Yerify backup when finished Perform checknum before writing to m Conginue on error Transaction log C Truncate the transaction log Back up to the top effort help, and leave Tape drive Revynd the tope before unloadin Compression | ap set expiration | |
| Passer Parts | | | | Page P | or burnep conglession. | | |
| | | ОК | Cancel | | | OK Cancel | |

Figure 1.0.0 - General Parameter Backup Window



Note: FaxCore Enterprise environments are pre-installed with *Microsoft SQL Server Standard Edition* hence, has the functionality to create and schedule automatic backups using the *SQL Server Agent* services. Please note the *SQL Server Agent* service isn't enabled by default therefore must be initiated manually for the first time via the *Windows Services Management Console* and subsequently configured to start-up automatically.

SQL Server Management Studio - SQL Server Agent

- 1. Launch the *SQL Server Management Studio* utility on your database server and authenticate yourself by providing the required credentials to establish a connection to your FaxCore database server.
- 2. Upon successfully authenticating yourself, expand the *SQL Server Agent* service from within your object explorer panel to display the *Jobs* folder.
- 3. Right click the *Jobs* folder and select *New Job* to display the *New Job* window. Select the *General* page to configure the backup parameters for your FaxCore database. Figure 3.0.0
- 4. Then while still displaying the *New Job* window, select the *Schedule* page to configure a scheduled routine for the backup job. Figure 4.0.0
- 5. Upon finalizing the backup parameters, click OK to save and apply your scheduled backup routine. A title summary of your backup job will be presented under the *SQL Server Agent > Jobs* folder list.

| 📧 New Job | | | | 📧 New Job | | | | |
|--|-------------------|---------------------------|----------|---------------------------------------|----------------------|--------------------|---------|---|
| Select a page | 🔄 Script 👻 🚺 Help | | | Select a page | 🔄 Script 👻 | 🚹 Help | | |
| General Steps Schedules Alerts Notifications | Name: | FXC_Daily_Backup_Exercise | | General Steps Schedules | Schedule <u>l</u> is | t | | |
| Alerts | <u>D</u> wner: | fxc_admin | | Alerts | ID | Name | Enabled | Description |
| Motifications | Calegory | | | Motifications | New | FXC_Daily_Schedule | Yes | Occurs every day at 12:00:00 AM. Schedule will be |
| i algots | Category: | [Uncategorized (Local)] | <u> </u> | i algete | | | | |
| | Description: | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
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| | | | | | | | | |
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| | | | | | | | | |
| | | | | | | | | |
| C | | | | C | | | | |
| Connection | | 1 | | Connection | | | | |
| Server: FCAPEV03\FXCINC | Enabled | | | Server: FCAPEV03\FXCINC | | | | |
| Connection: FCAPEV03\Administrator | | | | Connection: FCAPEV03\Administrator | | | | |
| I View connection properties | | | | I View connection properties | | | | |
| | | | | | | | | |
| Progress | | | | Progress | | | | |
| C Ready | | | | C Ready | • | | | |
| To an of | | | | "\$45 ⁶ | Nev | « | * | Edit Bemove |
| | | ОК | Cancel | | | | | OK Cancel |

Figure 3.0.0 - Backup Job Window

Figure 4.0.0 - Scheduling Job Window

SQL Server Management Studio - Maintenance Plan

- 1. Launch the *SQL Server Management Studio* utility on your database server and authenticate yourself by providing the required credentials to establish a connection to your FaxCore database server.
- 2. Upon successfully authenticating yourself, expand the *Management* folder from within your object explorer panel to display the *Maintenance Plan* folder.
- Right click the Maintenance Plan folder and select New Maintenance Plan to create a backup plan. Double click the Back Up Database Task from the toolbox and configure the backup parameters respectively. Figure 5.0.0
- 4. Then while still displaying the *Maintenance Plan* window, click the *Schedule* button to configure a scheduled routine for the backup plan. Figure 6.0.0
- 5. Upon finalizing the backup parameters, click OK to save and apply your scheduled backup routine. A title summary of your backup plan will be presented under the *Management > Maintenance Plan* folder.

| 📲 Back Up Database Task | Job Schedule Proper | rties - MaintenancePlan.Subplan_1 | |
|--|---------------------|---|------------------------------|
| Connection: Local server connection New | Name: | FXC_Daily_Backup_Maintenance-Schedule | Jobs in Schedule |
| Backup type: Full | Schedule type: | Recurring | ▼ Enabled |
| Database(s): Specific databases | | , . | |
| Backup component | One-time occurrence | 10/16/2009 Time: 1:04:55 | |
| Database Files and filegroups: | Date: | | |
| | Frequency | | |
| Backup set will expire: C After 14 days | Ogcurs: | Daily | |
| C On 10/29/2009 | Regurs every: | 1 day(s) | |
| Backup to: C Disk C Tage | Daily frequency | | |
| C Back up databases across one or more files: | Occurs once at: | 12:00:00 AM | |
| Add | O Occurs every: | 1 hour(s) Starting at: | 12:00:00 AM |
| Remove | | Ending at: | 11:59:59 PM |
| | Duration | | |
| Contents | Start date: | 10/16/2009 | 10/16/2009 💌 |
| If backup files exist: Append | | No end date: | |
| Create a backup file for every database Create a sub-directory for each database | Summary | | |
| Enider: | Description: | Occurs every day at 12:00:00 AM. Schedule will be u | ised starting on 10/16/2009. |
| Backup file extension: bak | | | |
| Verify backup integrity | | | |
| | | | |
| Back up the tail of the log, and leave the database in the restoring state Set backup concernentian. In which is the maximum tail. | - | | |
| | | Γ | OK Cancel Helo |
| OK Cancel <u>View T-SQL</u> <u>Help</u> | | L | Calibor Hop |

Figure 5.0.0 - Backup Job Window

Figure 6.0.0 - Scheduling Job Window

SQLCMD/OSQL Command Line Utility

- From your FaxCore database host server, launch the command prompt and change the current active directory view to the "Binn" folder within your Microsoft SQL Server installation directory.
 Example: "C:\Program Files\Microsoft SQL Server\MSSQL.1\Binn"
- 2. Following the reference parameters below, provide the required details for the fields: *dbusername*, *dbpassword* and *dbserver,port* to initiate the backup process.

| OSQL Option | SQLCMD Option |
|---|--|
| OSQL -S dbserver,port -U dbusername -P dbpassword <enter> BACKUP DATABASE [fxc_V6] TO DISK="C: \FXCDBBAK\fxc.bak"</enter> | SQLCMD -S dbserver,port -U dbusername -P dbpassword <enter> BACKUP DATABASE [fxc_V6] TO DISK="C:\FXCDBBAK\fxc.bak"</enter> |
| <enter></enter> | <enter></enter> |
| GO <enter></enter> | GO <enter></enter> |
| EXIT <enter></enter> | EXIT <enter></enter> |
| | |

Note: The reference parameters above by no means provide a comprehensive backup solution therefore it's highly advised that you peruse the available commands/syntax to customize your backup script accordingly.

3. To create automated backups, the above mentioned parameters can be scripted in a batch script and scheduled to run at specific intervals using a task scheduler.

Application/Database Backup Manager

Organization that employs the services of an enterprise level backup application manager may have the option of extending its functionality to create, maintain and restore backups of MSSQL type database.

However such extension differs according to version and manufacturer therefore it's highly recommended the product vendor be consulted for further clarification.

The Database Restore Guide

This chapter describes the various methods available to manage and restore the database from your FaxCore SQL database backups.

SQL Server Management Studio

Note: Prior to attempting the following steps below, please contact FaxCore Support to obtain the required FaxCore database login credentials to facilitate the database restoring process.

- 1. Launch the *SQL Server Management Studio* utility on your database server and authenticate yourself by providing the required details to establish connection to your FaxCore database server.
- 2. Upon successfully authenticating yourself, right click the *Databases* folder within your object explorer panel and select *Restore Database* to display the *Restore Database* window.
- 3. Based on the backup to file option, check *From Device* and browse the folder containing the backup file that ends with extension; **.BAK* then check the required backup sets to restore. Figure 7.0.0
- 4. Next while still displaying the *Restore Database* window; select the *Options* page to configure additional restore parameters. Figure 8.0.0
- 5. Upon finalizing the restore parameters, click OK to begin the restore process where upon completion, your FaxCore database will present itself under the *Databases* folder from within your object explorer panel.

| 🥫 Restore Database - fяс | | | | | | | 🥫 Restore Database - fx | c | | |
|------------------------------------|-------------------------|------------------|---|----------------------|--------------------|--------------------------|------------------------------------|----------|---|--|
| Select a page | Scrip 🚬 | it 🕶 🚺 | Help | | | | Select a page | <u> </u> | šcript 👻 [🐴 Help | |
| General Options | Destination for restore | | | | | | General | | estore options | |
| | Sel | lect or ty | pe the name of a new or e | xisting database for | your restore opera | iion. | | | verwrite the existing dat | |
| | To | databas | e: fxc | | | - | | | Preserve the replication s Prompt before restoring e | - |
| | - | a point i | | t recent possible | | | | | Restrict access to the res | |
| | 10 | a point i | riune. jimus | receirc possible | | | | | | |
| | Source | e for rest | ore | | | | | | Restore the database files as | |
| | 5.00 | aniju tha | source and location of ba | alum anto ta rantara | | | | | Original File Name fxc_pri | Restore As D:\FaxCore\xdata\fxc_pri.mdf |
| | She | ecily the | source and location of be | ckup sets to restore | | | | | fxc_xmsg_data | D:\FaxCore\xdata\fxc_xmsg_data.ndf |
| | 0 | F <u>r</u> om da | itabase: | | | v | | | fxc_xmsg_uata | D:\FaxCore\xdata\fxc_xmsg_data.hdf |
| | • | From de | wice: | D:\dbarchive\fxcdb | ac bak | | | | fxc_xnotify_data | D:\FaxCore\xdata\fxc_xnotify_data.ndf |
| | | - | , | | | | | | fxc xnotify index | D:\FaxCore\xdata\fxc xnotify index.ndf |
| | | | backup sets to restore: | 1 | - | | | | the mension data | DitforContratestine menere data with |
| | | estore | Name fxc-Full Database Backur | Component | Type Full | Server FXCINC20\FXCDB | | | | |
| | | | fxc-Full Database Backup fxc-Transaction Log Bac | | | FXCINC20\FXCDB | | Re | ecovery state | |
| Connection | | 14 | ixc-mansaction bog bac | Kup | Transactorricog | FACING204FACDD | Connection | | | |
| Server: FXCINC20\FXCDB | | | | | | | Server: FXCINC20\FXCDB | | Leave the database read transaction logs cannot b | ly to use by rolling back uncommitted transactions. Additional e restored.(RESTORE WITH RECOVERY) |
| Connection: PLUTO\Administrator | | | | | | | Connection: PLUTO\Administrator | | Leave the database non- transaction logs can be re | operational, and do not roll back uncommitted transactions. Additional estored.(RESTORE WITH NORECOVERY) |
| View connection properties | | | | | | | View connection prope | | | |
| Progress | | | | | | | Progress | | Leave the database in reader actions in a standby file set | ad-only mode. Undo uncommitted transactions, but save the undo o that recovery effects can be reversed.(RESTORE WITH STANDBY) |
| C Ready | • | | | | | Þ | Ready | | Standby file: | |
| | | | | | ÖK | Cancel | | | | OK Cancel |

Figure 7.0.0 - Restore Database Window

Figure 8.0.0 - Restore Options Window

- 6. Next, from within your object explorer panel, expand the restored FaxCore database and browse the *Security > Users* subdirectory and proceed to delete the following user: **fxc_admin**
- 7. Next, from within your object explorer panel, right click the SQL instance's *Security > Logins* subdirectory and select *New Login* to display the *Login New* window.
- 8. Select the *General* page to create an account utilizing the credentials obtained from FaxCore support. Ensure the *Enforce Password Policy* option is unchecked and *Default Database* option is mapped to the restored database.
- 9. Select the *User Mapping* page and map the user account to the restored FaxCore database. Ensure the *Database Role Membership* for the user account is as follow: **public** & **db_owner** and click OK to begin creating the user account.

Lastly, from within your object explorer panel, expand the restored FaxCore database and browse the Security > User subdirectory and proceed to double click the following user: **fxc_admin** to display its account properties. Select the *General* page and under the *Database Role Membership* option, ensure **db_owner** is checked and click OK to complete the database mapping process.

SQLCMD/OSQL Command Line Utility

 From your FaxCore database host server, launch the command prompt and change the current active directory view to the *"Binn"* folder within your Microsoft SQL Server installation directory. Example: *"C:\Program Files\Microsoft SQL Server\MSSQL.1\Binn"* 2. Following the reference parameters below, provide the required details for the fields: *dbusername*, *dbpassword* and *dbserver,port* to initiate the backup process.

| OSQL Option | SQLCMD Option |
|---|--|
| OSQL -S dbserver,port -U dbusername -P dbpassword <enter> RESTORE DATABASE [fxc_V6] FROM DISK="C: \fxcdb.bak" <enter> GO <enter></enter></enter></enter> | SQLCMD -S dbserver,port -U dbusername -P dbpassword <enter> RESTORE DATABASE [fxc_V6] FROM DISK="C:\fxcdb.bak" <enter> GO <enter></enter></enter></enter> |
| EXIT <enter></enter> | EXIT <enter></enter> |

Note: The reference parameters above by no means provide a comprehensive backup solution therefore it's highly recommended that you peruse the available commands/syntax to customize your backup script accordingly.

Backup & Restoring FaxCore Document Stores

To back up FaxCore document stores, backup the folders from the locations shown in **Global Settings > Document Stores**

| = 📑 SYSTEM 🗸 | | | | | | A 4 | • ? |
|-----------------------------------|-----------|----------------------|---------------------------|-------------------|-----------------|--|------|
| 🔮 Global Settings 🛛 🗸 | Global Se | attings > Document S | tore | | | | |
| | + 1 | C | | | Search | | ٩ |
| Domain Permissions Document Store | | NAME | LABEL | ADDRESS ROOT PATH | ADDRESS MASK PA | ATH DESCRIPTION | |
| | | DOCUMENTS | docs : owner | C:\FaxCore\xdoc | uploadDoc | Document Directory - partitioned by owner | * |
| | | MESSAGES | messages : sent | C:\FaxCore\xdoc | msg\OB | Outbound Message Directory - partitioned by day | |
| | | MESSAGES | messages : receive | C:\FaxCore\xdoc | msg\IB | Inbound Message Directory - partitioned by day | (|
| | | RENDERING | render : xml file | C:\FaxCore\xdoc | rendXMLFile | Rendering XML File Directory | |
| 🛱 Domain Settings < | | MESSAGES | messages : attachment | C:\FaxCore\xdoc | attachDoc | Outbound Message Attachment File Directory | |
| | | MESSAGES | messages : temp render | C:\FaxCore\xdoc | tempRendered | Temp Rendered File Directory | |
| | | TEMPFOLDER | temp folder | C:\FaxCore\xdoc | tempFolder | Temp folder for all temp files | |
| | | | | | | | |
| | | | | | | | - |
| | н | < 1 × × | 15 🔹 items per page | | | 1-7 of 7 it | .ems |

Appendix A – Configuration Tokens

Configuration tokens derive values from user and domain configuration options. Configuration tokens begin with the prefix CONFIG. In all tokens below, the data for the tokens are resolved from the values (overridden or inherited) in the configuration settings screens – e.g., general settings, receive settings, domain configuration settings.

| Configuration Tokens | | | | | | | |
|--------------------------------|---------------------------------|--|--|--|--|--|--|
| CONFIG.COMPANY_ADDRESS_CITY | Domain Company Address City | | | | | | |
| CONFIG.COMPANY_ADDRESS_COUNTRY | Domain Company Address Country | | | | | | |
| CONFIG.COMPANY_ADDRESS_POSTAL | Domain Company Address Postal | | | | | | |
| CONFIG.COMPANY_ADDRESS_STATE | Domain Company Address State | | | | | | |
| CONFIG.COMPANY_ADDRESS_STREET1 | Domain Company Address Street 1 | | | | | | |
| CONFIG.COMPANY_ADDRESS_STREET2 | Domain Company Address Street 2 | | | | | | |
| CONFIG.COMPANY_ADDRESS_STREET3 | Domain Company Address Street 3 | | | | | | |
| CONFIG.COMPANY_NAME | Domain Company Name | | | | | | |
| CONFIG.FAX.DIAL_PREFIX | Domain Fax Dial Prefix | | | | | | |
| CONFIG.FAX.DIAL_SUFFIX | Domain Fax Dial Suffix | | | | | | |
| CONFIG.FAX.LOCAL_CALLER_ID | Domain Fax Local Caller ID | | | | | | |
| CONFIG.FAX.LOCAL_CSID | Domain Fax Local CSID | | | | | | |
| CONFIG.FAX.LOCAL_NUMBER | Domain Fax Local Number | | | | | | |
| CONFIG.FAX.XMIT_FOOTER | Domain Fax Transmission Footer | | | | | | |
| CONFIG.FAX.XMIT_HEADER | Domain Fax Transmission Header | | | | | | |

| Configuration Tokens | | |
|--|------------------------------|--|
| CONFIG.GENERAL.DELIVERY_FROM | General Delivery From | |
| CONFIG.GENERAL.FXC_HTTP_MODE | General FXC HTTP | |
| CONFIG.GENERAL.FXC_PORT | General FXC Port | |
| CONFIG.GENERAL.FXC_SERVER | General FXC Server | |
| CONFIG.GENERAL.NOTIFICATION_FROM | General Notification From | |
| CONFIG.GENERAL.PASSWORD_SENDER_FROM | General Password Sender From | |
| CONFIG.GENERAL.URL_MESSAGE_VIEWER | General URL Message Viewer | |
| CONFIG.SERVER.URL | General Server Full URL | |
| CONFIG.TELCO.DIAL_RULES_AREA_CODE | Domain Area Code | |
| CONFIG.TELCO.DIAL_RULES_COUNTRY_CODE Domain Country Code | | |

Appendix B – Message Tokens

Message Tokens derive values from properties of a sent or received message (fax) – e.g., # of pages, remove fax number, transmit time, etc. Message tokens begin with the prefix MESSAGE.

Note: in the table below, **(MULTI-VALUED)** indicates if the token is multi-valued, and can be used with an extended Syntax. Refer to **Token Extended Syntax** for proper usage.

| Message Tokens | | |
|---------------------------|---------------------------------|--|
| MESSAGE.APPROVAL.DESC | Message Approval Description | |
| MESSAGE.APPROVAL.REPLY | Message Approval Reply | |
| MESSAGE.BARCODE | Message Bar Code (MULTI-VALUED) | |
| MESSAGE.BILLING_CODE | Message Billing Code | |
| MESSAGE.CREATE_DATE | Message Create Date | |
| MESSAGE.CREATE_DATE_TIME | Message Create Date Time | |
| MESSAGE .CREATE_TIME | Message Create Time | |
| MESSAGE.DATE | Message Schedule Date | |
| MESSAGE.DATE_TIME | Message Schedule Date Time | |
| MESSAGE.FROM_COMPANY_NAME | Message Sender Company Name | |
| MESSAGE.FROM_NAME | Message Sender Name | |
| MESSAGE.ID | Message ID | |
| MESSAGE.IS_OUTBOUND | Message Inbound or Outbound | |
| MESSAGE.IS_SUCCESS | Message Status | |
| MESSAGE.NOTE | Message Note | |

| Message Tokens | | |
|--------------------------------------|---|--|
| MESSAGE.NUMBER | Message Number | |
| MESSAGE.OWNER_DOMAIN_ID | Message Owner Domain ID | |
| MESSAGE.OWNER_DOMAIN_NAME | Message Owner Domain Name | |
| MESSAGE.OWNER_USER_ID | Message Owner User ID | |
| MESSAGE.OWNER_USERNAME | Message Owner UserName | |
| MESSAGE.RECIPIENT_LIST | Message Recipient List (MULTI-VALUED) | |
| MESSAGE.REFERENCE_NUMBER | Message Reference Number | |
| MESSAGE.SENDER_COMPANY_NAME | Message Sender Company Name | |
| MESSAGE.SENDER_NAME | Message Sender Name | |
| MESSAGE.STATUS | Message Overall Status | |
| MESSAGE.SUBJECT | Message Subject | |
| MESSAGE.TIME | Message Create Time | |
| MESSAGE.TRACKING_KEY | Message Tracking Key (MULTI-VALUED) | |
| MESSAGE.TRANSACTION_COUNT | Message Transaction(s) Count | |
| MESSAGE.TRANSACTION_COUNT_CANCELLED | Message Transaction(s) Cancelled | |
| MESSAGE.TRANSACTION_COUNT_COMPLETED | Message Transaction(s) Completed | |
| MESSAGE.TRANSACTION_COUNT_FAILED | Message Transaction(s) Failed | |
| MESSAGE.TRANSACTION_COUNT_IN_PROCESS | Message Transaction(s) In Process | |
| MESSAGE.XSACT.ADDRESS_FORMAT_TYPE | Message Transaction Address Format Type | |
| MESSAGE.XSACT.ATTEMPT_COUNT | Message Transmission Attempt Count | |
| MESSAGE.XSACT.COMPLETE_DATE | Message Transaction Complete Date | |
| MESSAGE.XSACT.COMPLETE_DATE_TME | Message Transaction Complete Date Time | |

| Message Tokens | | | |
|--------------------------------------|--|--|--|
| MESSAGE.XSACT.COMPLETE_TIME | Message Transaction Complete Time | | |
| MESSAGE.XSACT.DISPLAY_ADDRESS | Message Transaction Display Address | | |
| MESSAGE.XSACT.IMAGE_PATH | Message Transaction Image Path | | |
| MESSAGE.XSACT.IS_SUCCESS | Message Transaction Successful Or Not | | |
| MESSAGE.XSACT.NOTIFY.FROM_NAME | Message Notification Transaction Sender | | |
| MESSAGE.XSACT.NOTIFY.TRANSACTION_ID | Message Notification Transaction ID | | |
| MESSAGE.XSACT.NUMBER_PAGES_SENT | Message Transaction Total Sent Page | | |
| MESSAGE.XSACT.RECIPIENT_COMPANY_NAME | Message Transaction Recipient Company Name | | |
| MESSAGE.XSACT.RECIPIENT_NAME | Message Transaction Recipient Name | | |
| MESSAGE.XSACT.STATUS | Message Transaction Status | | |
| MESSAGE.XSACT.TRANSACTION_ID | Message Transaction ID | | |
| MESSAGE.XSACT.XMIT.AGENT_ID | Message Transmission Agent ID | | |
| MESSAGE.XSACT.XMIT.CALLED_NUMBER | Message Transmission Called Number | | |
| MESSAGE.XSACT.XMIT.CALLER_ID | Message Transmission Caller ID | | |
| MESSAGE.XSACT.XMIT.PORT_NO | Message Transmission Port No | | |
| MESSAGE.XSACT.XMIT.REMOTE_CSID | Message Transmission Remote CSID | | |
| MESSAGE.XSACT.XMIT.ROUTE_DIGITS | Message Transmission Routing Digits | | |
| MESSAGE.XSACT.XMIT.SERVER_NAME | Message Transmission Server Name | | |
| MESSAGE.XSACT.XMIT.STATUS | Messages Transmission Status | | |
| MESSAGE.XSACT.XMIT_CALL_TIME | Message Transmission Total Time | | |
| MESSAGE.XSACT.XMIT_ERROR_DESC | Message Transmission Error Description | | |
| MESSAGE.XSACT.XMIT_ERROR_ID | Message Transmission Error ID | | |

| Message Tokens | | |
|-------------------------------|---------------------------------|--|
| MESSAGE.XSACT.XMIT_ERROR_INFO | Message Transmission Error Info | |
| MESSAGE.XSACT.XMIT_TIME | Message Transmission Time | |
| MESSAGE.XSACT_PAGE_COUNT | Message Transaction Page Count | |

Appendix C – User Tokens

User Profile Tokens derive values from the user profile (see User Profile Configuration) including username, display name, last and first name, etc. User profile tokens begin with the prefix: USER.

Note: in the table below, **MULTI-VALUED** indicates if the token is multi-valued, and can be used with an extended Syntax. Refer to **Token Extended Syntax** for proper usage.

| User Token | | |
|--------------------------|-----------------------|--|
| USER.COMPANY_CITY | User Company City | |
| USER.COMPANY_COUNTRY | User Company Country | |
| USER.COMPANY_NAME | User Company Name | |
| USER.COMPANY_POSTAL | User Company Postal | |
| USER.COMPANY_STATE | User Company State | |
| USER.COMPANY_STREET_1 | User Company Street 1 | |
| USER.COMPANY_STREET_2 | User Company Street 2 | |
| USER.COMPANY_STREET_3 | User Company Street 3 | |
| USER.DISPLAY_NAME | User Display Name | |
| USER.DOMAIN_DESC | Domain Description | |
| USER.DOMAIN_ID | Domain ID | |
| USER.DOMAIN_NAME | User Domain Name | |
| USER.FAX.LOCAL_CALLER_ID | User Local Caller ID | |
| USER.FAX.LOCAL_CSID | User Local CSID | |

| User Token | | |
|---------------------------|---|--|
| USER.FAX.LOCAL_NUMBER | User Local Number | |
| USER.FIRST_NAME | User First Name | |
| USER.LAST_NAME | User Last Name | |
| USER.MIDDLE_NAME | User Middle Name | |
| USER.LIST.EMAIL | User Own Email List (MULTI-VALUED) | |
| USER.LIST.FAX | User Own Fax List (MULTI-VALUED) | |
| USER.LIST.MOBILE_PHONE | User Own Mobile Phone List (MULTI-VALUED) | |
| USER.LIST.PHONE | User Own Phone List (MULTI-VALUED) | |
| USER.PRIMARY.MOBILE_PHONE | User Primary Mobile Phone | |
| USER.PRIMARY_EMAIL | User Primary Email | |
| USER.PRIMARY_FAX | User Primary Fax | |
| USER.PRIMARY_PHONE | User Primary Phone | |
| USER.ROLE_ID | User Role ID | |
| USER.USERID | User ID | |
| USER.USERNAME | User UserName | |

Appendix D – Utility Tokens

User Profile Tokens derive values from the user profile (see User Profile Configuration) including username, display name, last and first name, etc. User profile tokens begin with the prefix: *UTIL*.

| Utility Token | | |
|----------------|--------------------------|--|
| UTIL.DATE | System Utility Date only | |
| UTIL.DATE_TIME | System Utility Date Time | |
| UTIL.TIME | System Utility Time only | |

Token Extended Syntax

The extended syntax is used for token that will return a string of concatenated values along with separator such as "," and ";" or intended to override the existing format.

Sample syntax: \$\$<token name>|<value array pointer>|<separator>|<format info>\$\$

| Syntax | Description | Sample Data: |
|---------------------|---|----------------------|
| Token name | The name of the token | MESSAGE.TRACKING_KEY |
| Value Index Pointer | Index pointer on which value to retrieve. First index value is always 0 (zero). Leave it empty if to show all. | 1 |
| Separator | Separator used to split the concatenated values. | , |
| Format info | All tokens use generic default formats that are culture-aware. Use this property only if you want to override the default format. | MM/dd/yyyy |

Example 1:

Retrieve the 2nd tracking value of a specific message/fax:

```
$$MESSAGE.TRACKING_KEY|1|,|$$
```

Example 2:

Retrieve the date of the message created with a defined format:

\$\$MESSAGE.CREATE_DATE|||MM/dd/yyyy\$\$

| Format Info | Supported Syntax | Legends |
|-------------|--|--|
| Date Format | yyyy-MM-dd yyyy-dd-MM MM-dd-yyyy | yyyy = Year MM = Month dd = Day |

| Format Info | Supported Syntax | Legends |
|-------------|------------------|---------------------|
| | dd-MM-yyyy | |
| | yyyy/MM/dd | |
| | yyyy/dd/MM | |
| | MM/dd/yyyy | |
| | dd/MM/yyyy | |
| Time Format | hh:mm:ss tt | hh = 12 hour |
| | hh:mm:ss t | HH = 24 hour |
| | HH:mm:ss | mm = minute |
| | | ss = second |
| | | tt = AM/PM |
| | | t = A/P |

Appendix E – Gateway Specifications

Embedded Codes

Embedded codes works by embed FaxCore readable codes in content of file, where the service will pick up and process it, remove it from the content (based on configuration), and push the content to FaxCore. This works for text based content only.

Embedded Codes for PCL

This gateway works in the same concept as above, but the codes are embedded into PCL content. This gateway supports both text and binary based PCL content, but the codes must be in readable format (text).

Embedded Codes for PDF

This gateway works in the same concept as above, but the codes are embedded into PDF file. This gateway supports both text and binary based PDF content, but the codes must be in readable format (text) before the %PDF header.

Embedded Code Commands

This section lists the codes and syntax that FaxCore detects in the print stream or file. FaxCore's parser functionality behaves like a print stream filter, removing all embedded information and writing the original print data to an output file for further processing. All embedded codes detected in a print stream are translated into fax or email destination structures.

Note: The sequence of embedded codes must start with ^[and end with ^]
 Additional designators can be added immediately following the preceding text.
 Designators are Case Sensitive.

В

Billing Code

Lets you enter a Billing code for the message Example:

^[BBillCode1234^]

С

Cover Page Notes Lets you enter text into the Notes field of a cover page. Example:

^[CThis message will be in the notes section of the cover page^]

D

Destination fax number or destination email address.

(Required field)

Indicates the destination address for the document.

The format for this designator is as follows: Country Code followed by the remaining numbers. For example, North American fax numbers are a total of 11 digits.

Examples:

^ [D13038704141^]
^ [Djohndoe@contoso.com^] - to send to an email address

Ε

Exclude Cover Page

Lets you exclude sending a cover page with the message (**True** or **False**) Example:

^[ETrue^]

Μ

Cover Page Subject Lets you enter text into the Subject field of a cover page. Example:

^[MSubject Message^]

Ν

Recipient's display name Lets you enter text into the To field of a cover page. Example: ^[NJohn Jones^]

G

Recipient's Company Name Lets you enter text into the To field of a cover page. Example: ^[GContoso Inc.^]

r[GContos

К

Tracking key. Lets you enter a tracking key to the fax for indexing/search. Example: ^[KMessageTracking^] 119

0

User name of the originator of the job

(Required field – unless Allow anonymous is "Enabled", then if O is not specified the anonymous user will be used to send the message)

Indicates what FaxCore user is associated with the sent fax. Depending on the user settings of the user, this also enables a cover page to be sent with the fax. Example:

^[Oecuser^]

Ρ

Message Priority Lets you define the priority of the message being sent (1-100)

S

Sender's name (used as a "fax from" designation). Lets you enter text in the From field of a cover page. Example:

^[SJohn Jones^]

Т

Scheduled date and time. Lets you schedule a fax to be sent at a later time. Example: ^[T01/01/98 2:00p^]

Υ

Include default cover page

Lets you specify whether to include the originator/user's (specified with O) default cover page (**True** or **False**)

Example:

^[YTrue^]

Ζ

Example of an Embedded Code Sequence:

```
^[D 13038704141^[M Purchase Order 110011^[N John Jones^[C This is a test fax!^[O lsmith^[SLinda Smith^[T 05/21/05 1:00p^]
```

FaxCore interprets this sequence as follows:

The document will be delivered by fax to: +1 (303) 870-4141 The Subject field on the cover page contains the following text: Purchase Order 110011 The To field on the cover page contains the following text: John Jones The Notes field on the cover page contains the following text: This is a test fax! The user that sent the fax is lsmith The From field on the cover page contains the following text: Linda Smith The fax is to be sent on May 21st, 2005 at 1 PM. **Note:** Designators/codes are case sensitive. Any designators/codes that are not on the list will be treated as additional tracking keys. Example:

^[ATrackingKey#2^]

Control File

This gateway work on a concept of dropping a control file along with attachments to a predefined folder. The service will pick up the control file and process the content before pushing the data to FaxCore. Control file has to be in text based format. Binary control file is not supported.

The FaxCore control file gateway uses **name**: value style format. The following fields can be specified in the control file.

The following fields should be specified once.

| Field Name | Description | Data Type | Required |
|---------------|---|--------------|-------------------------|
| subject | Subject of the message. Used by cover pages. | String | no |
| notes | Notes of the message. Used by cover pages. | String | no |
| trackingKey | Tracking key that can be used to track the message. | String | no |
| priority | Priority that the request will get processed. | Integer | no |
| senderName | Sender name. Used by cover pages. | String | no |
| senderCompany | Sender company. Used by cover pages. | String | no |
| senderAddress | Sender fax, phone, or email address. Used by cover pages | String | no |
| billingCode | Billing code to associate with the request. Used in billing reports. | String | No |
| coverPageName | Name of the FaxCore stored cover page (case sensitive) to use for the fax. | String | no |
| userName | The FaxCore username with which to send the message. The profile set up for the | String | Yes if a defaultUser |

| | FaxCore user will be used in the general | | Name is |
|---------|---|---------|-------------------------------------|
| | processing of the fax. | | not specified in the profile. |
| nocover | Indicates to not use any cover page, even if specified by the FaxCore user profile. Set to 1 to omit cover pages. | Integer | no |

The following fields can be specified multiple times.

| Field Name | Description | Data Type | Required |
|------------------|--|-----------|----------|
| recipientName | Recipient name. Used by cover pages. | String | no |
| recipientCompany | Recipient company. Used by cover pages. | String | no |
| recipientAddress | Recipient fax number | String | yes |
| filename | Relative path of the associated document or image (tif/pdf) file. Can specify multiple filenames fields. | String | yes |
| notification | A notification to attach to the message. | String | no |

The following is a sample of a working control file that will create a single message with 4 fax deliveries:

Filename:testFax.tif

Subject:Test Subject
notes:Test Notes
trackingKey:T12345
nocover:1

senderName:Joe Smith
senderCompany:BEI
senderAddress:18583622640

recipientName:John Smith
recipientCompany:FaxCore
recipientAddress:18665551111

```
recipientName:Jim Smith
recipientCompany:FaxCore
recipientAddress:18665552222
```

recipientAddress:18665553333
recipientAddress:18665554444

SAP

This gateway takes in control file drop from SAP. This is a different gateway process from file gateway. Please refer to SAP integration documentation for more info.

Oracle

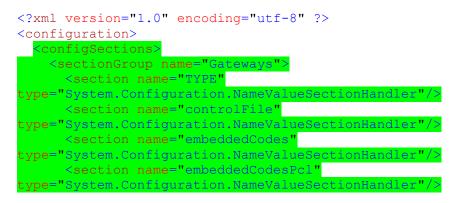
This gateway accept control file from Oracle service. The concept is the same with control file gateway.

Custom Gateway Setup [v5.2.1.15 and above]

Custom gateway provides option for user to create multiple gateway of the same type. This allows flexibility for user to have multiple same gateways type for different purpose.

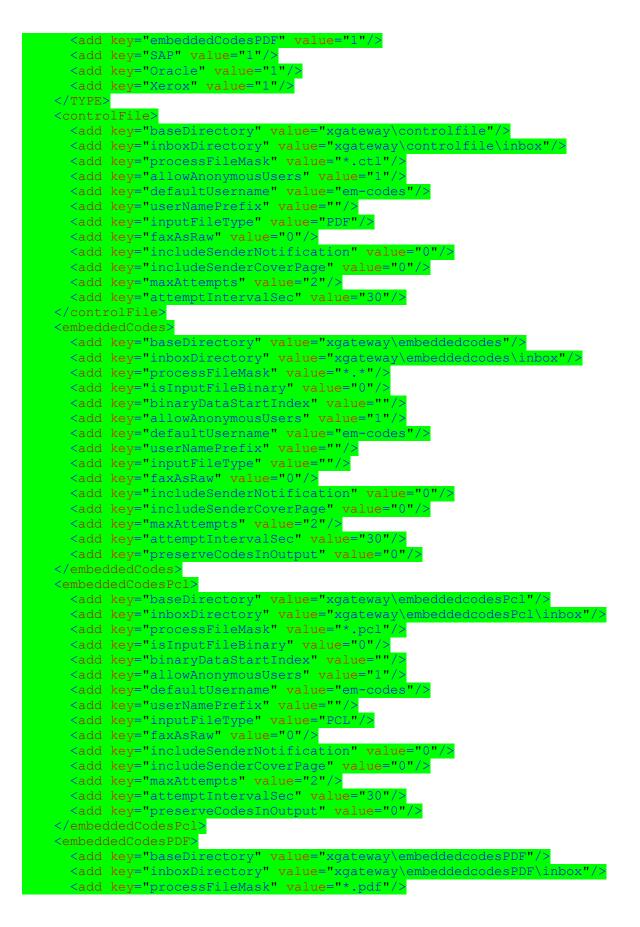
In order to support custom gateway, changes must be made to GatewayAgent.exe.config file with additional settings for custom gateways.

Screen below illustrates a new configuration file with custom gateway settings. Green highlighted section contains existing/default settings and yellow highlighted sections contain new for custom gateways.



```
<section name="embeddedCodesPDF"</pre>
type="System.Configuration.NameValueSectionHandler"/>
      <section name="SAP"</pre>
type="System.Configuration.NameValueSectionHandler"/
      <section name="Oracle"</pre>
type="System.Configuration.NameValueSectionHandler"/>
      <section name="Xerox"</pre>
type="System.Configuration.NameValueSectionHandler"/
    </sectionGroup>
   <sectionGroup name="Customs">
      <section name="Xerox1"</pre>
type="System.Configuration.NameValueSectionHandler"/>
      <section name="Xerox2"</pre>
cype="System.Configuration.NameValueSectionHandler"/>
      <section name="Xerox3"</pre>
type="System.Configuration.NameValueSectionHandler"/>
   </sectionGroup>
    <section name="log4net"</pre>
type="log4net.Config.Log4NetConfigurationSectionHandler, log4net"/>
    <sectionGroup name="applicationSettings"</pre>
type="System.Configuration.ApplicationSettingsGroup, System, Version=2.0.0.0,
Culture=neutral, PublicKeyToken=b77a5c561934e089" >
      <section name="GatewayAgent.Properties.Settings"</pre>
type="System.Configuration.ClientSettingsSection, System, Version=2.0.0.0,
Culture=neutral, PublicKeyToken=b77a5c561934e089" requirePermission="false"
/>
    </sectionGroup>
  </configSections>
  <log4net>
    <appender name="RollingLogFileAppender"</pre>
type="log4net.Appender.RollingFileAppender">
      <file value="log\GatewayAgentLog.txt" />
      <appendToFile value="true" />
      <datePattern value="yyyyMMdd" />
      <rollingStyle value="Composite" />
      <maxSizeRollBackups value="10" />
      <maximumFileSize value="5MB" />
      <layout type="log4net.Layout.PatternLayout">
        <conversionPattern value="%date [%thread] %-5level %logger -</pre>
(%file:%line) - %m%n" />
      </layout>
    </appender>
    <root>
      <level value="ALL" />
      <appender-ref ref="RollingLogFileAppender" />
    </root>
  </log4net>
  <Customs>
    <Xerox1>
      <add key="type" value="Xerox" />
      <add key="baseDirectory" value="xgateway\xerox"/>
      <add key="inboxDirectory" value="xgateway\xerox\inbox"/>
      <add key="relayDirectory" value="xgateway\xerox\relay"/>
      <add key="processDirectory" value="xgateway\xerox\process"/>
      <add key="processedDirectory" value="xgateway\xerox\processed"/>
      <add key="defaultUsername" value="Admin"/>
      <add key="userNamePrefix" value=""/>
```

```
<add key="allowAnonymousUsers" value="1"/>
      <add key="processFileMask" value="*.ctl"/>
      <add key="inputFileType" value="TIF"/>
      <add key="faxAsRaw" value="1"/>
      <add key="replacements" value="recipientAddress|string
MetaDataValue^subject|string JobTemplateDescription"/>
      <add key="includeSenderNotification" value="1"/>
      <add key="includeSenderCoverPage" value="0"/>
      <add key="maxAttempts" value="2"/>
      <add kev="attemptIntervalSec" value="30"/>
    </Xerox1>
    <Xerox2>
      <add key="type" value="Xerox" />
      <add key="baseDirectory" value="xgateway\xerox"/>
      <add key="inboxDirectory" value="xgateway\xerox\inbox"/>
      <add key="relayDirectory" value="xgateway\xerox\relay"/>
      <add key="processDirectory" value="xgateway\xerox\process"/>
     <add key="processedDirectory" value="xgateway\xerox\processed"/>
     <add key="defaultUsername" value="Admin"/>
     <add key="userNamePrefix" value=""/>
      <add key="allowAnonymousUsers" value="1"/>
      <add key="processFileMask" value="*.ctl"/>
      <add key="inputFileType" value="TIF"/>
      <add key="faxAsRaw" value="1"/>
      <add key="replacements" value="recipientAddress|string
MetaDataValue^subject|string JobTemplateDescription"/>
     <add key="includeSenderNotification" value="1"/>
      <add kev="includeSenderCoverPage" value="0"/>
      <add key="maxAttempts" value="2"/>
      <add key="attemptIntervalSec" value="30"/>
    </Xerox2>
    <Xerox3>
      <add key="type" value="Xerox" />
      <add key="baseDirectory" value="xgateway\xerox"/>
      <add key="inboxDirectory" value="xgateway\xerox\inbox"/>
      <add key="relayDirectory" value="xgateway\xerox\relay"/>
      <add key="processDirectory" value="xgateway\xerox\process"/>
      <add key="processedDirectory" value="xgateway\xerox\processed"/>
     <add key="defaultUsername" value="Admin"/>
     <add key="userNamePrefix" value=""/>
      <add key="allowAnonymousUsers" value="1"/>
      <add key="processFileMask" value="*.ctl"/>
      <add key="inputFileType" value="TIF"/>
      <add key="faxAsRaw" value="1"/>
      <add key="replacements" value="recipientAddress|string</pre>
MetaDataValue^subject|string JobTemplateDescription"/>
      <add key="includeSenderNotification" value="1"/>
      <add key="includeSenderCoverPage" value="0"/>
      <add key="maxAttempts" value="2"/>
      <add key="attemptIntervalSec" value="30"/>
    </Xerox3>
  </Customs>
  <Gateways>
    <TYPE>
      <add key="controlFile" value="1"/3
      <add key="embeddedCodes" value="1"/
      <add key="embeddedCodesPcl" value="1"
```







To setup custom gateway, please refer to <u>sectionGroup</u> name "Customs". This is where you specify the required custom gateway. In the example above, there are 3 custom gateways setup, each with unique name.

Below it there is a "<u>Customs</u>" section where the custom gateways settings are populated. Please note each gateway section naming convention must follow exactly the same stated in "sectionGroup" portion.

Add key and value pair into the custom gateway name section. You can refer to the default configuration found in "Gateways" section, with <u>additional name and value pair added</u> <add key="type" value="Xerox" />

The "type" name and value pair tells the service to load which gateway type instance. You can have many of same type, provided the name must be unique. Another unique setting required is the base directory. 2 gateways cannot share the same base directory to avoid conflict.

You can reuse the name and value pair from the static gateway setting as a reference.