



Version 1.1

# FaxFinder X50 Administrator Guide

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# Disclaimer

## Support

The FaxFinder team strives to provide you with the highest quality product support.

Send your questions to  
[support@faxfinder.net](mailto:support@faxfinder.net).

Please send your feedback and comments regarding this documentation to  
[support@faxfinder.net](mailto:support@faxfinder.net).

## Introduction

## Components

The FaxFinder fax server consists of the following modules and components.

### *FaxFinder IIS web component (FaxFinder Web Client & Admin Panel)*

FaxFinder 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.

### *FaxFinder 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.

### *FaxFinder FaxAgent (Fax board & FOIP Drivers)*

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

### *FaxFinder 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 FaxFinder.

### *FaxFinder 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.

### *FaxFinder Database (Microsoft SQL 2008 Engine)*

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

### *FaxFinder Web Services/SOAP SDK*

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

## Available Versions

FaxFinder is available in the following versions:



### *FaxFinder X50 Series Standard Edition*

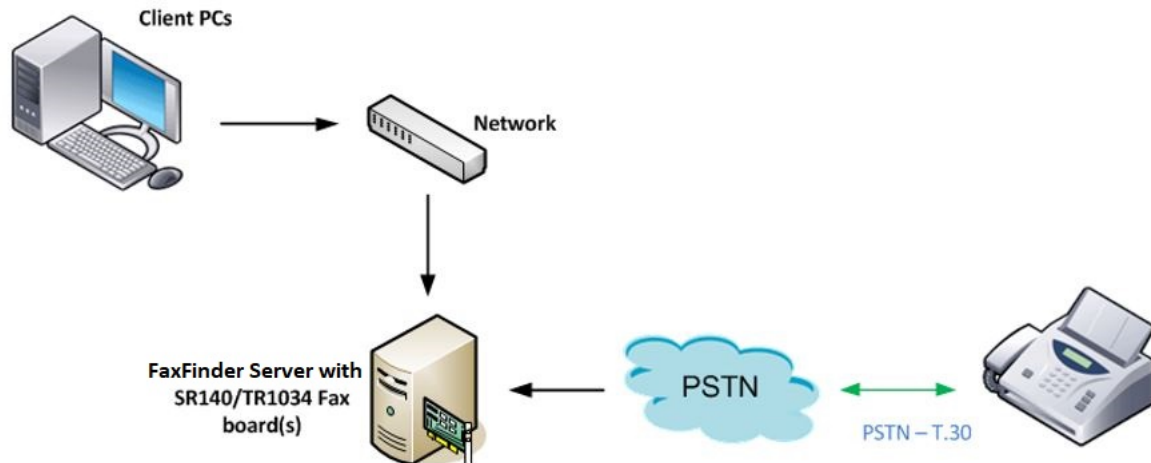
- Supports unlimited users and up to six (7) seven channels
- FaxFinder Web Client
- FaxFinder IP Fax Printer Driver
- FaxFinder Web Services SDK
- Microsoft Exchange & SMTP Email Integration
- Microsoft SQL 2008 Express Edition

### *FaxFinder X50 Series Enterprise Edition*

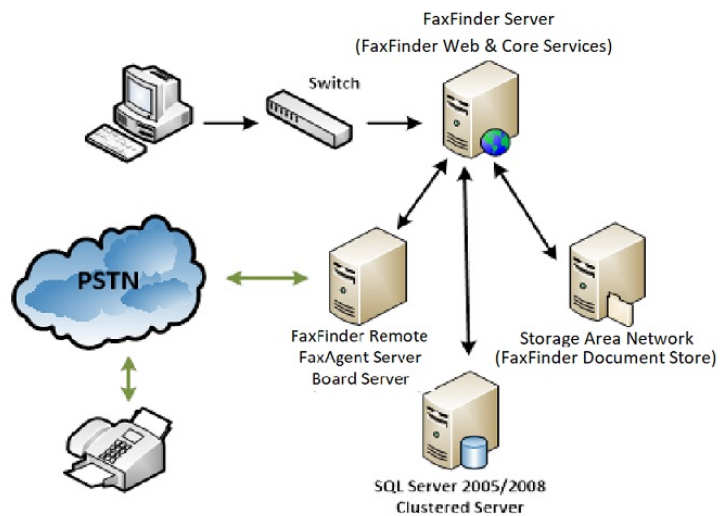
- Requires upgrade if 7 channels or less
- Supports unlimited users and fax channels
- FaxFinder Web Client
- FaxFinder IP Fax Printer Driver
- FaxFinder Web Services SDK
- Microsoft Exchange & SMTP Email Integration
- FaxFinder File Gateways/Embedded Codes
- Microsoft SQL 2008 Standard Embedded Edition
- Included in FFX50 w/etherFAX bundles (FFX50-2-EF, FFX50-4-EF, FFX50-8-EF)

## FaxFinder Network Architecture

### FaxFinder Stand-Alone Installation



### FaxFinder N-Tier/Multi-Server Architecture

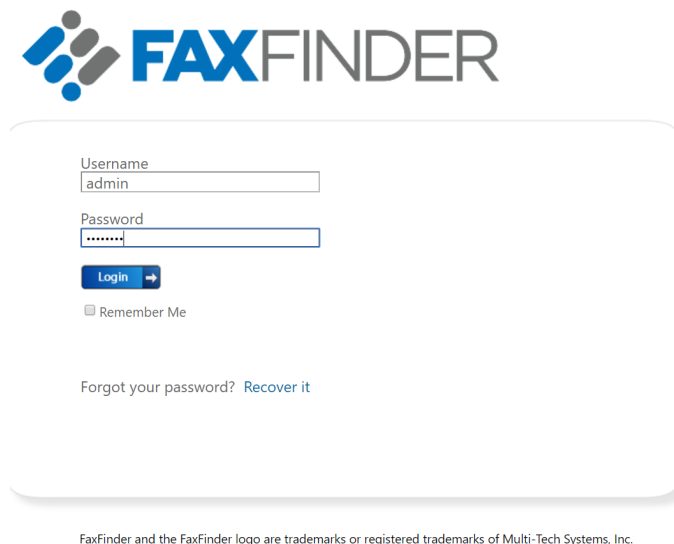


## Initial Steps after Installation

### Initial Admin Login

After FaxFinder 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 FaxFinder 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 42](#).

### Setting up FaxFinder

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

1. Create domains (Optional).  
For more information, see the chapter titled "FaxFinder Domains" starting on [page](#)

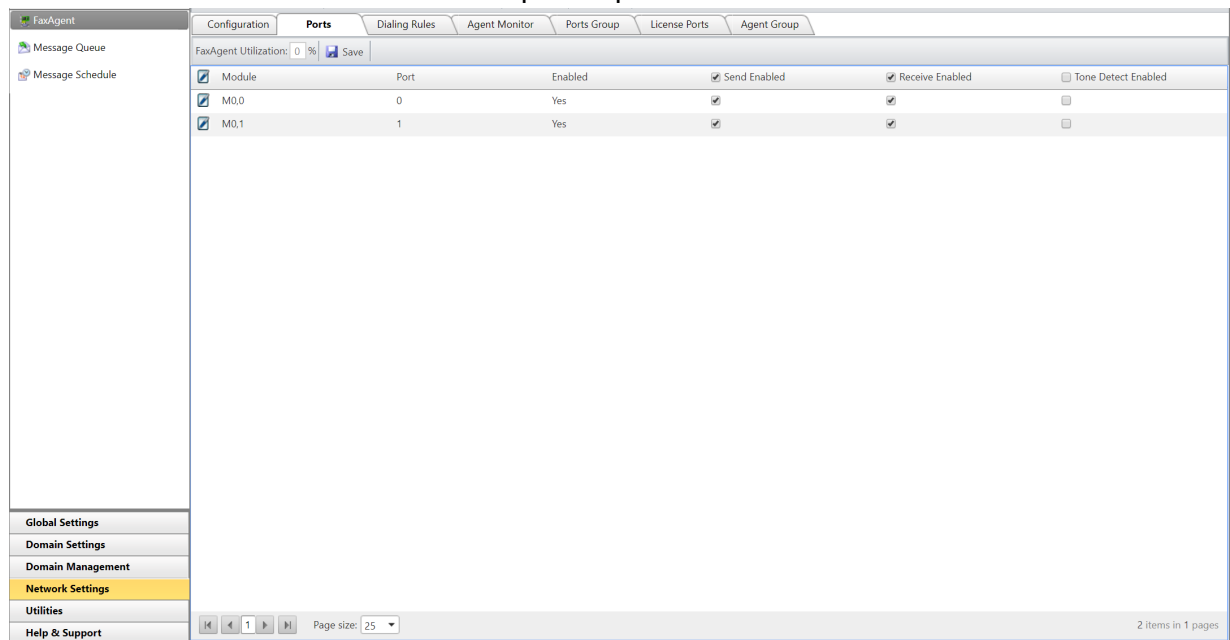
**26.**

2. Create users.  
For detailed instructions, see the chapter titled “Creating Users” starting on [page 28](#).
3. Configure Fax board properties.  
For detailed instructions, see the chapter titled “Connecting and Configuring Fax Lines/Boards” starting on [page 8](#).
4. Create inbound routes.  
For detailed instructions, see the chapter titled “Routing Inbound Faxes to Users” on [page 48](#)

## 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.



- To access individual port configuration, click the **Edit** link for the associated port number.  
The **Edit Port Configuration** dialog box will display.

Port 0 Configuration	
Answer Ring	3
Dial Timeout(sec)	60
Local CSID	FAXFINDER
Tone Detect Digits	4
Tone Wait Timeout(sec)	5
Greeting Type	Tone
Greeting WAV File	Not Applicable
Header Style	Default
Custom Fax Header	

- 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.

- 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 22](#)

## 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.

The screenshot shows the 'Fax Agent' configuration window with the 'Dialing Rules' tab selected. The left sidebar contains links to 'Message Queue' and 'Message Schedule'. The main area has a 'Dialing Prefix/Suffix' section with a 'Save' button. Below this are input fields for 'International Dial Prefix' (011), 'Domestic Dial Prefix' (1), 'Custom Dial Prefix', and 'Raw Dial Prefix'. To the right are corresponding fields for 'International Dial Suffix', 'Domestic Dial Suffix', 'Custom Dial Suffix', and 'Raw Dial Suffix'. Below these is a 'Dial string' field and a 'Replace With' dropdown. At the bottom, there are buttons for 'Add', 'Remove', and 'Import'. A table below these buttons shows columns for 'Seq', 'Dial String', 'Replace With', 'Append With', and 'Active'. The table is currently empty, with a message 'There are no custom dialing rules available'.

- **International Dial Prefix/Suffix** - Appends/Prepend an international Dial Prefix when FaxFinder detects a Country code other than the one specified on the Configuration Tab.
- **Domestic Dial Prefix/Suffix** - Appends/Prepend a domestic Dial Prefix when FaxFinder 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	<input type="text" value="FAX"/>		
Fax #	+ 60	3	33249226

Country Code on Configuration tab: 1

International Dial Prefix: 011

FaxFinder Dial String: 01160333249226

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

**Example 2:**

Delivery	<div>FAX</div>		
Fax #	+ 1	720	8704141

Area Code on Configuration tab: **720**

Domestic Dial Prefix: **1**

FaxFinder Dial String: **8704141**

Explanation: **FaxFinder detects the same Area Code & Country Code, hence does not append the dial string with “1” and remove the Area Code from the dial string**

**Example 3:**

Delivery	<div>FAX</div>		
Fax #	+ 1	732	5550015

Area Code on Configuration tab: **720**

Domestic Dial Prefix: **1**

FaxFinder Dial String: **17325550015**

Explanation: **FaxFinder 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:**

Dial string:	<div></div>	Replace With	<div></div>	Add	Remove	Import	
<input type="checkbox"/>			Seq	Dial String	Replace With	Append With	Active
<input type="checkbox"/>			1	1720	720		<input checked="" type="checkbox"/>

Dial String: **1720**

Replace With: **720**

Actual Dial String: **17208704141**

Final FaxFinder Dial String: **7208704141**



**Example 2:**

Dial string:		Replace With		Add	Remove	Import	
<input type="checkbox"/>			Seq	Dial String	Replace With	Append With	Active
<input type="checkbox"/>			1	1720		,,,5555	<input checked="" type="checkbox"/>

Dial String: **1720**

Append With: **,,,5555**

Actual Dial String: **17208704141**

Final FaxFinder Dial String: **17208704141,,,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**”.

**FAXFINDER** Help Log Off

Domain Settings Fax Settings Save Apply All

**Configure Domain** SYSTEM

**Dialing Rules** Keep All Local Settings

Country Code	1	
Area Code		
Dial Prefix		
Dial Prefix Rule	Use agent configuration only	
Dial Suffix		
Dial Suffix Rule	Use agent configuration only	
Raw Fax Dial Rule	Disabled	

**Fax Send Setting**

Local CSID	FaxFinder	
Local Caller ID		
Default Fax Format	Fax	
Email Notification Format	with attachment	
Email Attachment Max Size	Unlimited	
Resolution	Fine (204x196dpi)	
Fax Header	%d %t %-%23c -> %-%23n %p	
Page Send Limit	250	
Transact Send Limit Per Day	0	

**Fax Receive Setting**

Allow Fax Received Partially	Yes	
Email Notification Format	with attachment	
Email Attachment Max Size	Unlimited	
Un-assigned Message User	System-Unrouted ( SYSTEM\SYS-UNROUTED )	

**Default Send Attachment(Cover Page)**

Cover Page	Default CoverPage	
------------	-------------------	--

**Global Settings**

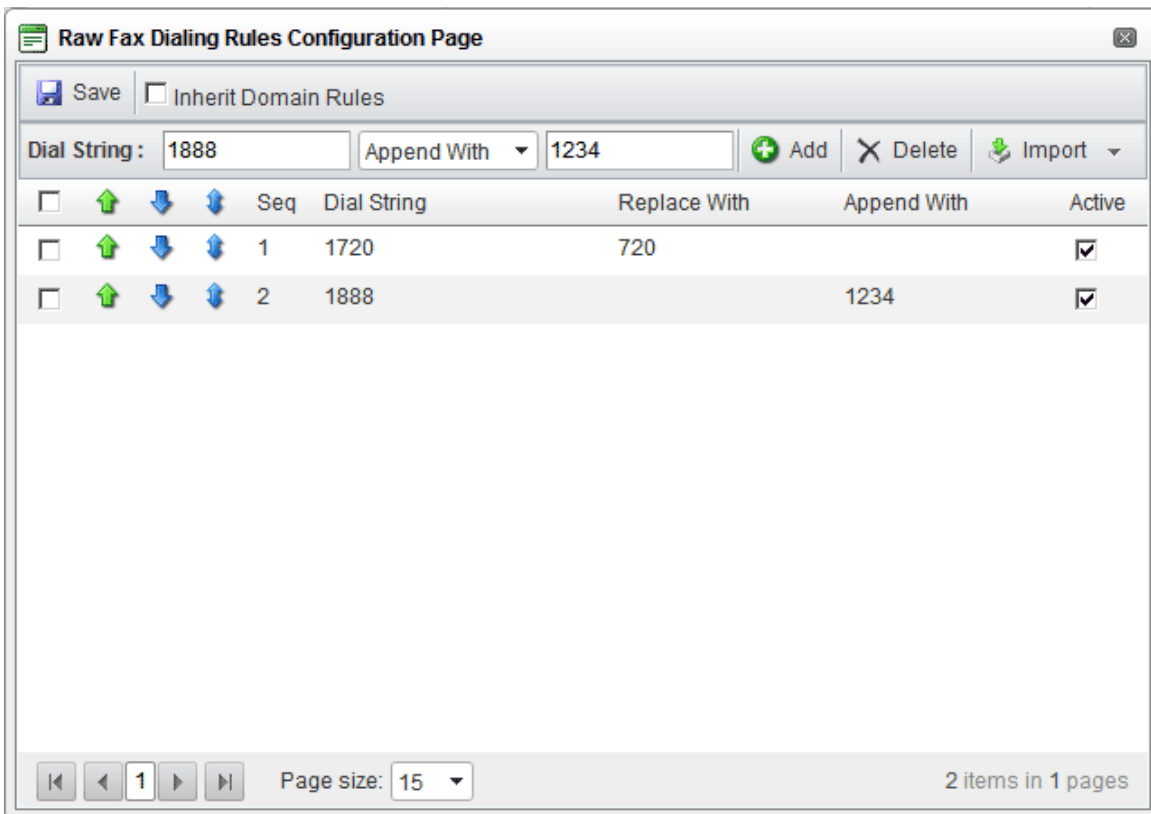
**Domain Settings**

**Domain Management**

**Network Settings**

**Utilities**

- 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”.



The screenshot shows the 'Raw Fax Dialing Rules Configuration Page' window. At the top, there is a 'Save' button and an 'Inherit Domain Rules' checkbox. Below this is a 'Dial String' field containing '1888' and an 'Append With' dropdown menu set to '1234'. To the right of these fields are three buttons: 'Add' (with a green plus icon), 'Delete' (with a red X icon), and 'Import' (with a green download icon). The main area of the window contains a table with the following columns: 'Seq', 'Dial String', 'Replace With', 'Append With', and 'Active'. There are two rows of data in the table. The first row has 'Seq' 1, 'Dial String' 1720, 'Replace With' 720, and 'Active' checked. The second row has 'Seq' 2, 'Dial String' 1888, 'Append With' 1234, and 'Active' checked. At the bottom of the window, there are navigation buttons (back, forward, first, last) and a 'Page size' dropdown set to '15'. On the far right, it says '2 items in 1 pages'.

Seq	Dial String	Replace With	Append With	Active
1	1720	720		<input checked="" type="checkbox"/>
2	1888		1234	<input checked="" type="checkbox"/>

**Example 1:****1720 Replace with 720**

Raw Fax Number: 17208704141

Actual Dialed Number: 7208704141

**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

FaxFinder 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 FaxFinder 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 pencil icon 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 FaxFinder Evolution eV5, at least one outbound routing rule must exist for each FaxFinder server. By default, FaxFinder 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.

Active	Priority	Time-based Routing	Route String	Server Type	Server Name	Alternative Network Route
<input checked="" type="checkbox"/>	10	No	[Routing Digit] = *	Fax Agent	DE1-FCEU01 (100002)	No

3. To create a new outbound route, click **New**.
4. The **Outbound Routing Rule** dialog box displays.

Save Reset

**Outbound Routing Rule**

**Conditions** Domain SYSTEM AND

Set

**Route String** [Routing Digit] = \*\*

**Route Type** Fax Agent

**Fax Agent** FXLAB-FXEV5 (100001)

**Assign Method** Port

**Port No** \*

**Activate Route** Yes

**Priority** 10  
\* higher number is higher priority. (1-9999)

**Route by time-based** No

**Override Message's Priority** Disable

[Click to manage alternative network routing](#)

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

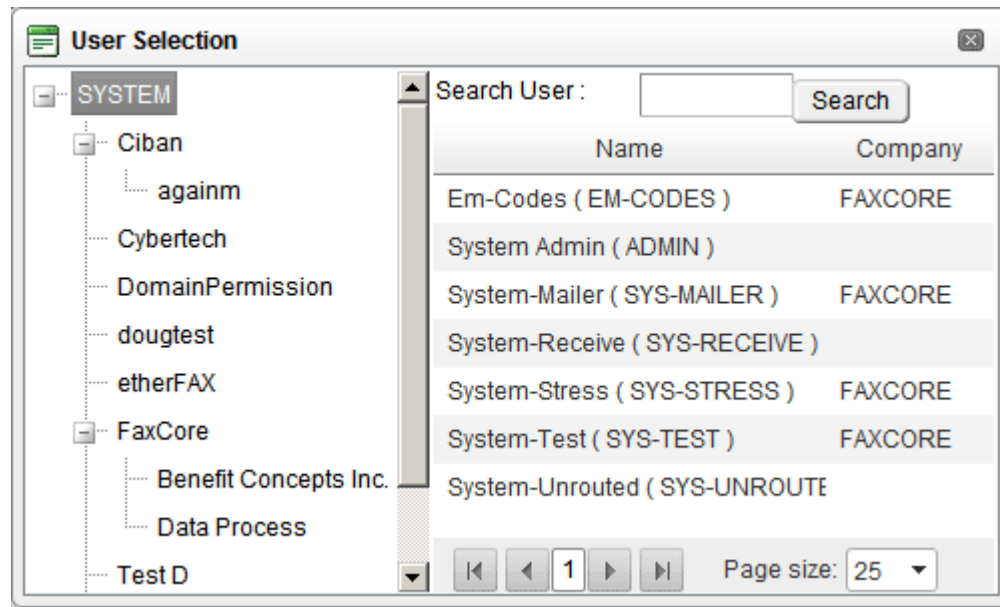
### Conditions

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 left-hand 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 FaxFinder user.



Double-click the desired username and it appears in the right-hand 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 X icon to delete a rule or the pencil icon to edit a rule. If you click the pencil icon, the **Outbound Routing Rule** dialog box (see below) displays.

Global Settings

Server Settings

Domain Permissions

Document Store

Email Integration

Inbound Routing

Outbound Routing

Printer Settings

Black List Publication

Global Settings

Domain Settings

Domain Management

Network Settings

Utilities

Help & Support

Outbound Routing

New

Delete

Refresh

Search:

<input type="checkbox"/>		Active	Priority	Time-based Routing	Route String	Server Type	Server Name	Alternative Network Route
<input type="checkbox"/>		Yes	10	No	[Routing Digit] = ''	Fax Agent	DE1-FCEU01 (100002)	No

Page size: 15

1 items in 1 pages

## Fax Agent

### Introduction

This chapter describes the requirement and configuration guidelines for FaxFinder 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, FaxFinder registers the initial FaxAgent automatically. FaxAgent registration is only required if you are installing a 2<sup>nd</sup> 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):

1. Edit the fax agent configuration file located within the FaxFinder installation directory - e.g., C:\FaxFinder\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 FaxFinder server. If FaxFinder 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 FaxFinder server as a Remote Fax Agent, enter the FaxFinder server IP address or FQDN as the value.

Example:

```
<add key="Server" value="YourFaxFinderServerName">
```

4. Locate the subsection

```
<applicationSettings>
...
</applicationSettings>
```

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

```
http:// YourFaxFinderServerName:2372/WebServices/wfFaxAgent.asmx
```

If FaxFinder 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 FXC3.FaxAgent service startup type from Manual to Automatic.

When initialized, the FXC3.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 **FaxFinder 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 FXC3.FaxAgent service.

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

1. Navigate to **Network Settings > Fax Agent > Configuration** and **DELETE** the required fax agent by selecting from the drop down list. Then stop the FXC3.FaxAgent service on the host server of the deleted agent.
2. Edit the fax agent configuration file located within the FaxFinder installation directory - e.g., C:\FaxFinder\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 FXC3.FaxAgent service to automatically re-register itself into the agent pool together with a new identifier number.

## Configurations

1. 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.

The screenshot shows the FaxAgent Configuration window with the 'Network Settings' tab selected. The left sidebar contains links for Message Queue, Message Schedule, Global Settings, Domain Settings, Domain Management, Network Settings (highlighted), Utilities, and Help & Support. The main area is divided into sections: Agent Information, Driver Information, and Fax Configuration.

**Agent Information**

FaxAgent Server Name	DE1-FCEU01
FaxAgent Server IP	10.10.140.41
FaxAgent Label	

**Driver Information**

Fax Driver	Etherfax
Service Path	C:\Users\FC_SERVICE\AppData\Local\Temp\FaxCore.Server
Configuration Path	

**Fax Configuration**

Country Code	1
Area Code	
Current Status	Running
Total Fax Ports	2

**Fax Configuration**

☐ Pool outgoing faxes to the same destination to a predefined port.

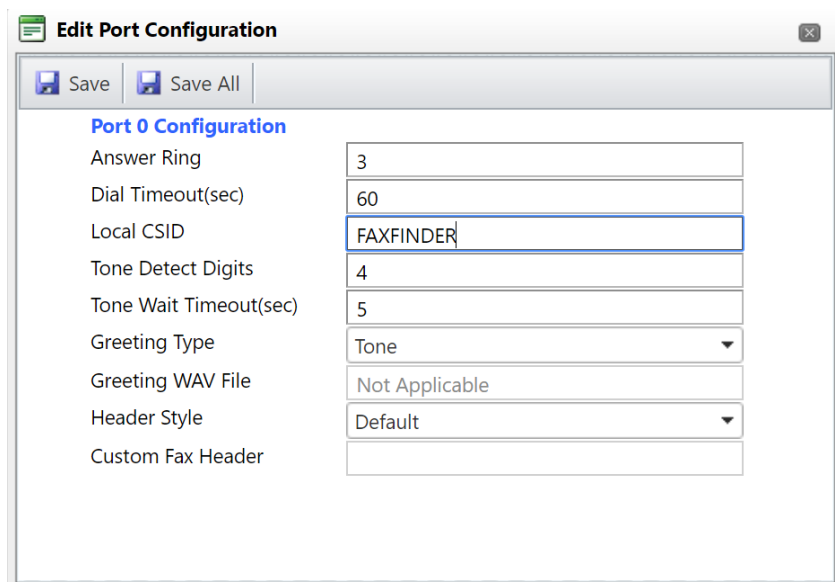
2. Populate the country and area code of the region and click the **Save** button to store and apply the changes. These refer to the location where the fax agent resides.
3. Enable “**Pool outgoing faxes to the same destination to a predefined port**” if you want all outbound faxes that are going to 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.
4. 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.

The screenshot shows the FaxAgent Configuration window with the 'Ports' tab selected. The left sidebar is the same as the previous screenshot. The main area shows a table of port configurations and a 'Save' button.

FaxAgent Utilization: 0 % [Save](#)

Module	Port	Enabled	Send Enabled	Receive Enabled	Tone Detect Enabled
M0,0	0	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
M0,1	1	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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 Edit link:



The image shows a software window titled "Edit Port Configuration". At the top, there are two buttons: "Save" and "Save All". Below these buttons, the section "Port 0 Configuration" is displayed. It contains a list of configuration parameters, each with a corresponding input field. The "Local CSID" field is currently selected and contains the text "FAXFINDER".

Configuration Parameter	Value
Answer Ring	3
Dial Timeout(sec)	60
Local CSID	FAXFINDER
Tone Detect Digits	4
Tone Wait Timeout(sec)	5
Greeting Type	Tone
Greeting WAV File	Not Applicable
Header Style	Default
Custom Fax Header	

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

### FaxFinder Domains

#### Overview

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

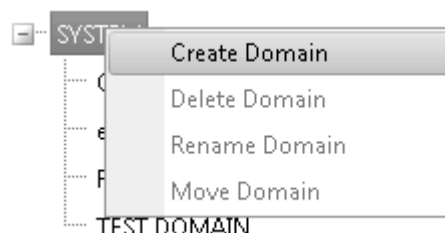
User settings and configurations are inherited from the Domain Settings and then Domain Settings are inherited from the Global Settings. When working with users and domains it is important to understand which settings takes precedence over the other, User or Domain or Server? Below is the order of precedence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

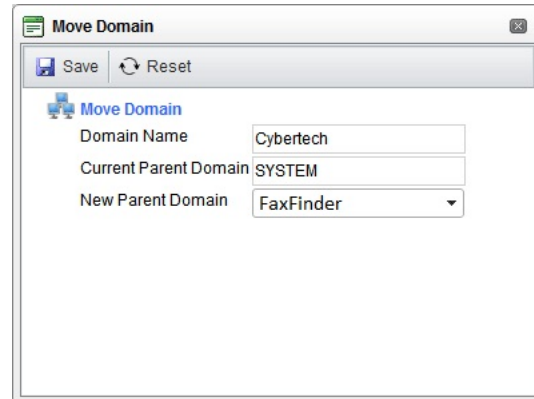
1. This is an optional step because FaxFinder has a default Domain (SYSTEM) which you can use to store users in.
2. Navigate to **Domain Management > Domain Info**.
3. On the left, the existing domains are displayed as a hierarchy. Right-click on the name of a domain in the list to display the context menu and select **Create Domain** to create a new child domain beneath the name you clicked on.



#### *Modifying or Deleting a Domain*

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

2. 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. 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.





## Creating Users

There are three ways to create new users in FaxFinder:

- 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 **New**. A dialog box appears for entering new user data.

The screenshot displays the 'New User' dialog box in FaxFinder. It features three main sections: 'Select Domain', 'User Info', and 'Addresses'. The 'Select Domain' section has a 'Domain' dropdown menu currently set to 'SYSTEM'. The 'User Info' section contains several input fields: 'User Name', 'User Password', 'User Role' (a dropdown menu set to 'STANDARD USER'), 'Authentication Type' (a dropdown menu set to 'External'), 'Is Active' (a dropdown menu set to 'Yes'), 'Display Name', 'First Name', 'Middle Name', 'Last Name', 'Prefer Address Type' (a dropdown menu set to 'EMAIL'), and 'Description'. The 'Addresses' section at the bottom shows a table with columns 'Address Type' and 'Address', which is currently empty. A green 'Add Address' button is located to the right of the table. The dialog box has a standard Windows-style title bar with 'Save', 'Save & Close', and 'Reset' buttons. The footer of the dialog indicates 'Page size: 15' and '0 items in 1 pages'.

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 29 \(Synchronize with Microsoft Active Directory\)](#)

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

FaxFinder 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, FaxFinder reads the Active Directory and updates the FaxFinder 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 FaxFinder 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 FaxFinder 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 FaxFinder 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 FaxFinder 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

Directory Provider	MS Active Directory (LDAP) ▼
Logon Server	192.168.100
Logon Username	fxccom\administrator
Logon Password	●●●●●●●●
Authentication Type	None ▼

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

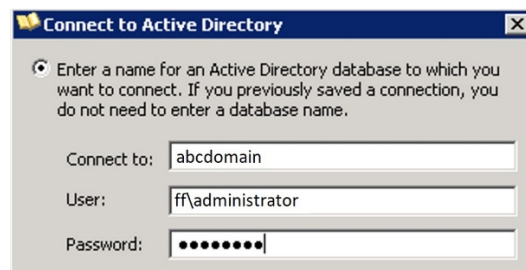
This step is optional and only used when you want to limit or filter the users that are being synchronized with FaxFinder. If you are synchronizing all users from your Active Directory, you can leave these fields blank.

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 ADEplorer.exe:



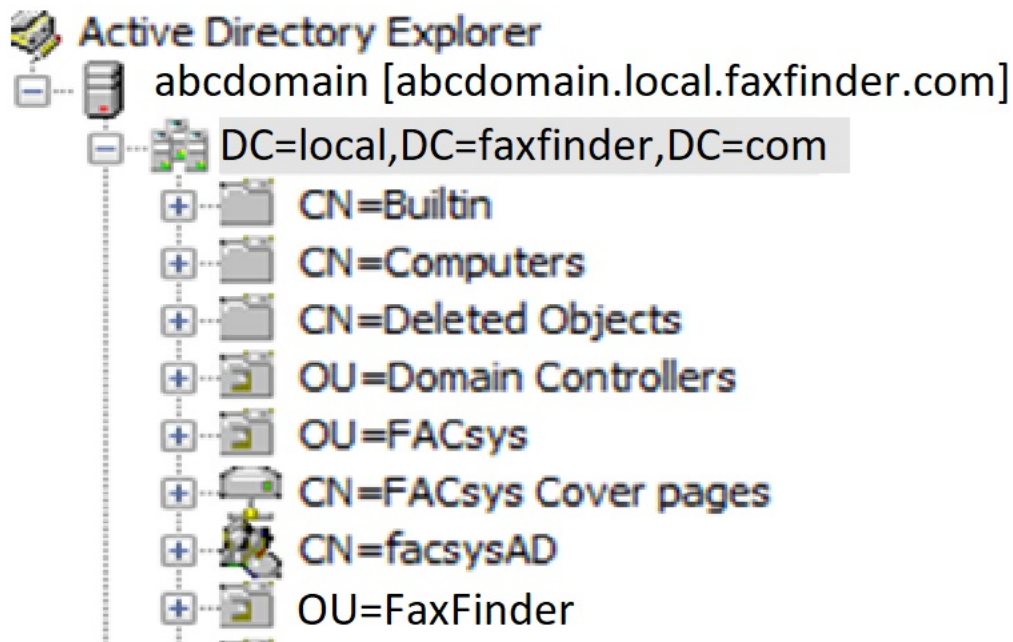
**Connect to:** Your Active Directory Servername/IP Address

**User:** User with Domain Admin rights

**Password:** Domain Admin User Password

Expand the **server name** -> **domain name**

### Example:





Search Filter Settings	
Domain	local.faxcore.com
Organization Units	
Security Groups	
Custom Filter	
Properties to Read	
Max Users to Read	

### *Domain*

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

#### **Example:**

local.FaxFinder.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:**

FaxFinder

Sync users within the FaxFinder OU in Active Directory.

#### **Example 2:**

TestOU1,OU=FaxFinder

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

#### **Example 3:**

TestOU1,OU=FaxFinder;OU=FaxFinder

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

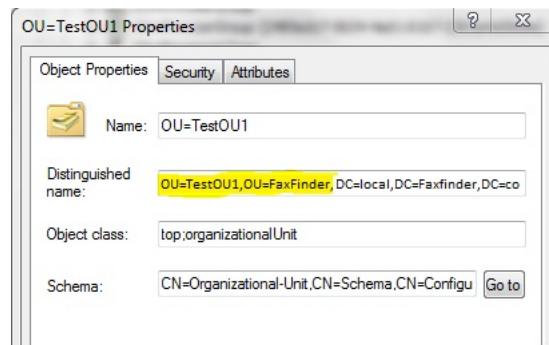
#### **Tips:**

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

Right click on the OU that you want to Sync from ADEplorer 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=FaxFinder.



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

### Security Groups

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

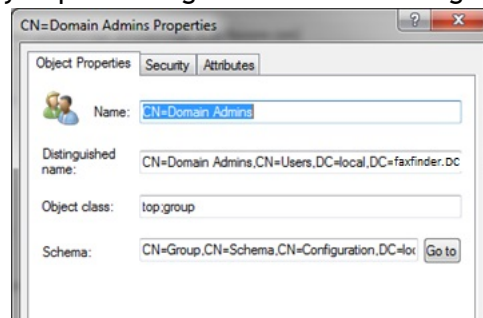
#### Example:

CN=Domain Admins,CN=Users,DC=local,DC=FaxFinder,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:



Right click on the Security Group and click Properties. Copy the “Distinguished name:” value and paste into the Security Group field in FaxFinder.

### 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=FaxFinder,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	<input type="text" value="Add and update"/>
Enable Auto Sync	<input type="text" value="Yes"/>
Interval	<input type="text" value="Daily"/> <input type="text" value="12:00 AM"/> 
Auto Sync Next Date	<input type="text" value="2012-01-20 12:00 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**

Faxcore Username Format	<input type="text" value="short username(bjones)"/>
-------------------------	---

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

### New User Handling

 **Processing Rules - New User Handling**

New User Password	<input type="text" value="fax"/>
Prefer Address Type	<input type="text" value="EMAIL"/>
Authentication Mode	<input type="text" value="External"/>
Inbound Route Handling	<input type="text" value="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 FaxFinder 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 FaxFinder synchronizes the user's Inbound Route with the Fax number (facsimiletelephonenumber) attribute/ field:

The screenshot shows the 'Administrator Properties' dialog box with the 'Telephones' tab selected. The 'Telephone numbers' section contains five fields: Home, Pager, Mobile, Fax, and IP phone. Each field has an 'Other...' button to its right. The 'Fax' field is highlighted and contains the value '+1 (720) 8704141'. Below the telephone fields is a 'Notes' section with a text area.

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

#### Example:

Pager

This creates an inbound route for the users with the numbers in the Pager 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 mean to 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 (720) 8704141**

Inbound Routing rule created: **\*4141**

### Deleted User/Domain Handling



#### Processing Rules - Deleted User/Domain Handling

Deleted user handling

Ignore faxcore user ▼

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

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

### Exchange Integration

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



#### Exchange Integration

Exchanger Server

https://mail.contosso.com

Exchange Version

Exchange 2007 ▼

### 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 FaxFinder from a file.

Navigate to **Utilities > Import Users**.

Utilities	
Import Contacts	
<b>Import Users</b>	
Search Messages	
Search Users	
Audit Trail	
Reports	
Purge Settings	
<b>Global Settings</b>	
<b>Domain Settings</b>	
<b>Domain Management</b>	
<b>Network Settings</b>	
<b>Utilities</b>	
<b>Help &amp; Support</b>	

Import Users	
Import    Reset	
<b>Import Specification</b>	
FaxCore Domain	SYSTEM
<b>Import File</b>	Choose File    No file chosen
Header Format	FaxCore Default Import Header
File Type	Csv
Has header	Yes
Delimiter Format	CSV Delimited
<b>Default Settings</b>	
<b>User Password</b>	
User Role	Standard User
File Attachment Format	PDF
Prefer Address Type	Email
Include Address In Receive Notification	Yes
Include Address In Send Notification	Yes
Authentication	Internal
Route Field	
Route Priority	99
Prefix to append to route	
Route Length	

## Import Specification

### FaxFinder 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 FaxFinder, or you can specify your own format. In the **Header Format** input field, select **FaxFinder Default Import Header** to use the FaxFinder 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 FaxFinder 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.	<a href="mailto:jdoe@contoso.com">jdoe@contoso.com</a> FMT=PDF
Fax	User's fax number.	+1-720-870-4141
Http	User's http address. Add FMT=PDF/TIF after http address to specify the file format to	http://webapp.contoso.com_FMT=PDF

Data Field Name	Description	Example
	post file via HTTP. A space is required after HTTP address.	
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 path. A space is required after file path. Address can be a local path on the FaxFinder Server or UNC Path. See example.	C:\User\administrator\ FMT=PDF \\pc_name\path\Usn=username;Dmn=domain;pwd=password FMT=PDF
Printer	User's network printer.	Xerox Printer
Mobile	User's mobile number.	1-720-870-4141
FaxRaw	User's raw fax number.	17028074141
Phone	User's phone number.	1-720-870-2900
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 1 = System Admin 2 = Domain Admin 3 = Super Users 4 = Standard Users Use only single digit (1,2,3, or 4) in this column	4
FileFormat	Notification Attachment File Format PDF/TIF	PDF

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  
 FaxFinder01, jsmith@clientcompany1.com, John Smith  
 FaxFinder01, hbrown@clientcompany1.com, Helen Brown  
 FaxFinder02, 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 FaxFinder 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 35](#).

## Modifying Users

### Single User

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

1. Navigate to **Domain Management > Users**.
2. 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**

Domain Management

Users Move To:  Action Search

**Configure Domain** SYSTEM

<input type="checkbox"/>		User Name	Domain Name	Status	External Auth	Role
<input type="checkbox"/>		ADMIN	SYSTEM	Active	No	System Admin
<input type="checkbox"/>		CKAISER	SYSTEM	Active	No	System Admin
<input type="checkbox"/>		DRAY	SYSTEM	Active	No	System Admin
<input type="checkbox"/>		EM-CODES	SYSTEM	Active	No	Standard User
<input type="checkbox"/>		JBLEES	SYSTEM	Active	No	System Admin
<input type="checkbox"/>		SAREND	SYSTEM	Active	No	System Admin
<input type="checkbox"/>		SYS-MAILER	SYSTEM	Active	No	Standard User
<input type="checkbox"/>		SYS-RECEIVE	SYSTEM	Active	No	Standard User
<input type="checkbox"/>		SYS-STRESS	SYSTEM	Active	No	Standard User
<input type="checkbox"/>		SYS-TEST	SYSTEM	Active	No	Standard User
<input type="checkbox"/>		SYS-UNROUTED	SYSTEM	Active	No	Standard User
<input type="checkbox"/>		TBOATWRIGHT	SYSTEM	Active	No	System Admin
<input type="checkbox"/>		TLINHARD	SYSTEM	Active	No	System Admin
<input type="checkbox"/>		WES	SYSTEM	Active	No	System Admin

Page size: 15

Domain Management

Global Settings

Domain Settings

Domain Management

Network Settings

Utilities

Help & Support

### 3. Double-click the user name. The user dialog box opens.

Save Save & Close Reset

User Profile **General Settings** Fax Settings Permissions Reset Password

**User Info**

User Name: ADMIN

User Role: SYSTEM ADMIN

Authentication Type: Internal

Is Active: Yes

Display Name: System Admin

First Name: System

Middle Name:

Last Name: Admin

Prefer Address Type: EMAIL

Description: System Admin contact

**Addresses**

		NOR	NOS	Primary	Address Type	Address
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email	admin@faxcore.com

Page size: 15

1 items in 1 pages



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

## Multiple Users

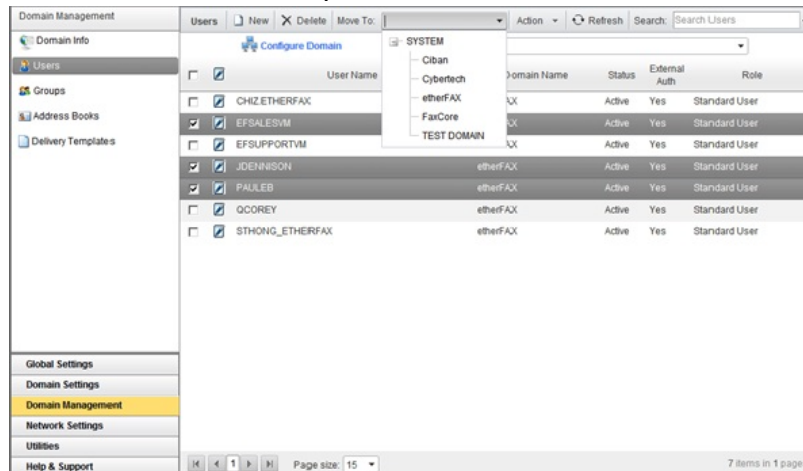
There are certain changes that you can perform on multiple users at one time:

- 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.

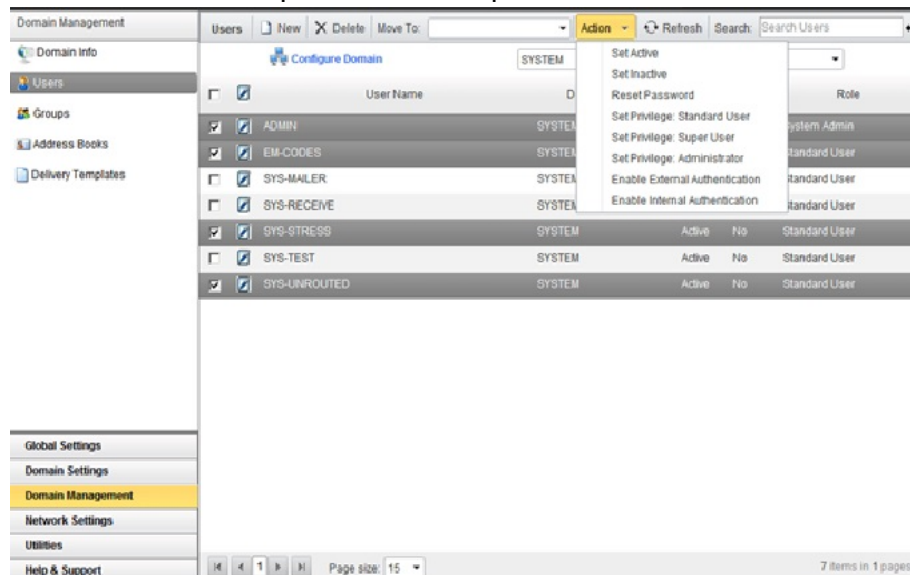
**Note:** If you enable external authentication for a user, that user's data may be updated if you synchronize the FaxFinder user database with a Microsoft Active Directory. To avoid that possibility, enable internal authentication for that user.

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

1. Navigate to **Domain Management > Users**.
2. 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.



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.



## User/Domain Permissions

### FaxFinder 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 FaxFinder notify the users upon receive success.

**Allow Notify When Message Receive Fail**

Lets FaxFinder notify the users upon receive fail.

**Allow Notify When Message Send Success**

Lets FaxFinder notify the users upon send success.

**Allow Notify When Message Send Fail**

Lets FaxFinder 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 FaxFinder how to route inbound faxes to users. When a fax is received, FaxFinder searches for an appropriate inbound routing rule to determine where to route the fax to. This means that FaxFinder 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 **New**. The **Inbound Routing Rule** dialog box opens.

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**.

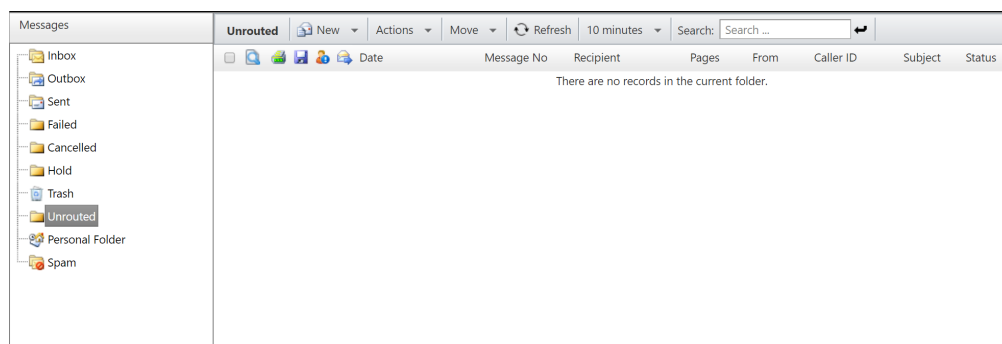
### Edit Existing Inbound Routing Rule

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 un-routed fax.

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

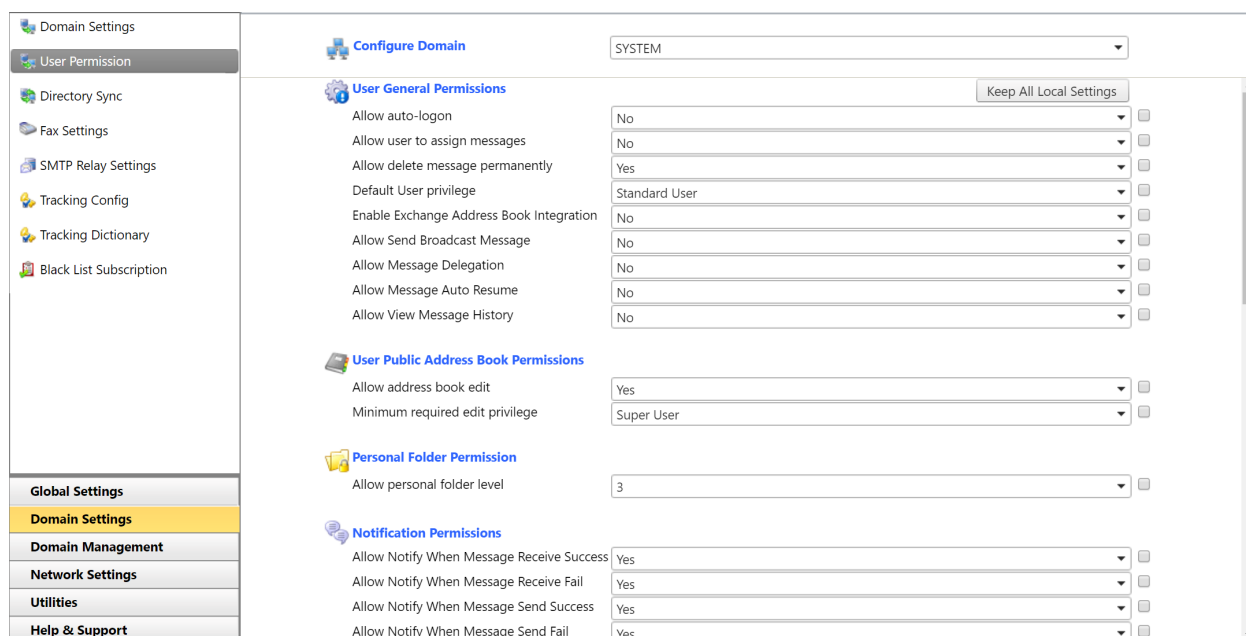


The **Unrouted** folder is NOT VISIBLE to users by default. To enable users to view/assign messages from this folder, administrator must enable the permission of the user(s) to **"Allow user to Assign Messages"**.

*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"**



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,*

1. Navigate to Domain Management > Users and locate the user to allow access to the **“Unrouted”** folder.
2. Double click on the user to edit the user settings.
3. Navigate to the Permissions tab and set **“Allow user to assign messages”** to **“Yes”**.

The screenshot shows the 'Permissions' tab in the FaxFinder Web User Interface. The 'User General Permissions' section is active, displaying a list of permissions with dropdown menus and checkboxes. The 'Allow user to assign messages' option is set to 'Yes' and has an unchecked checkbox. The 'Keep All Local Settings' button is visible in the top right corner of the permissions section.

Permission	Value	Checkbox
Allow auto-logon	No	<input checked="" type="checkbox"/>
Allow user to assign messages	Yes	<input type="checkbox"/>
Allow delete message permanently	Yes	<input checked="" type="checkbox"/>
Allow Send Broadcast Message	No	<input checked="" type="checkbox"/>
Allow Message Delegation	No	<input checked="" type="checkbox"/>
Allow Message Auto Resume	Yes	<input type="checkbox"/>

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



## Printing Faxes with Network Printers

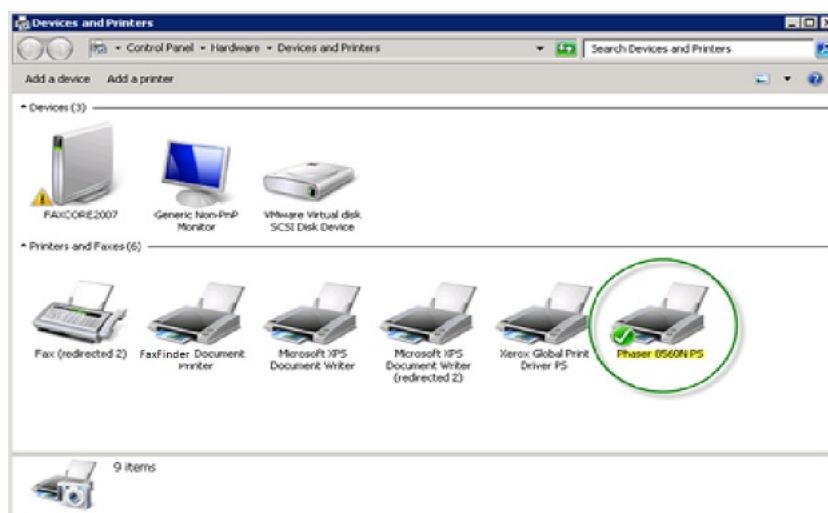
In many occasions, faxes need to be printed out as a hard-copy document. FaxFinder provides users with the option to print faxes manually from the User Interface or setup a Network Printer in their User Profile to print faxes automatically.

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

### Setting up Network Printer

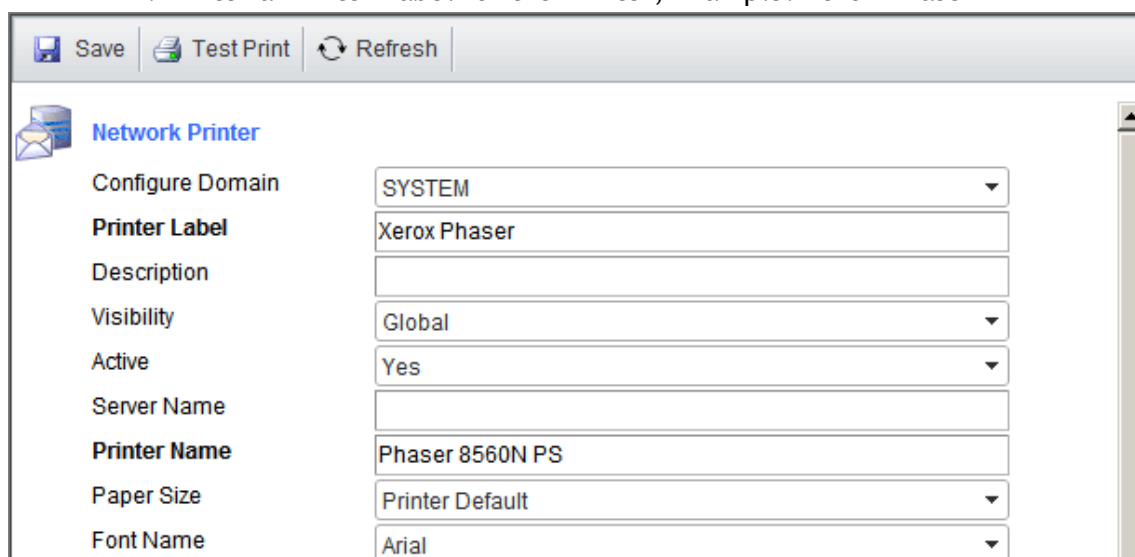
#### *Step1: Install Printer Drivers to FaxFinder Server in Windows*

Firstly, install the Printer to the FaxFinder 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 FaxFinder

1. Next navigate to Global Settings > Printer Settings and click on “New”
2. Enter a Printer Label for the Printer, Example: Xerox Phaser



Save Test Print Refresh

**Network Printer**

Configure Domain: SYSTEM

Printer Label: Xerox Phaser

Description:

Visibility: Global

Active: Yes

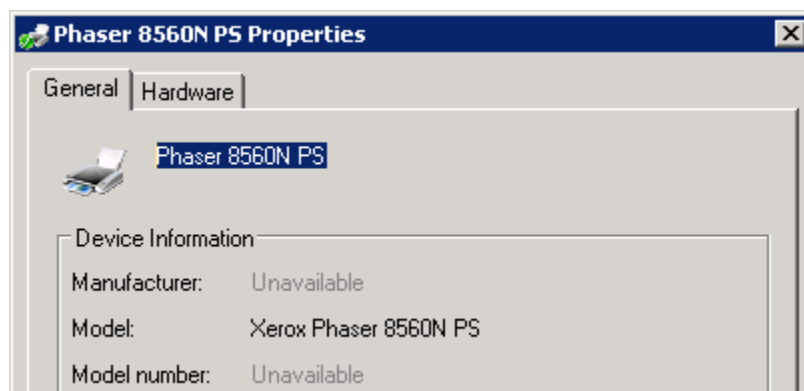
Server Name:

Printer Name: Phaser 8560N PS

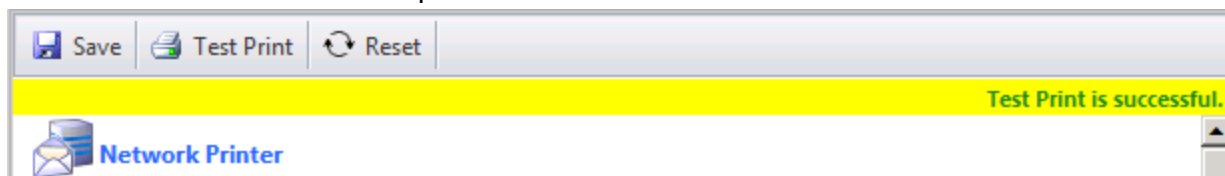
Paper Size: Printer Default

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.*

**User Profile** | General Settings | Fax Settings | Permissions | Reset Password

**User Info**

User Name: ADMIN

User Role: SYSTEM ADMIN

Authentication Type: Internal

Is Active: Yes

Display Name: System Admin

First Name: System

Middle Name:

Last Name: Admin

Prefer Address Type: EMAIL

Description: System Admin contact

**Addresses** Add Address

	NOR	NOS	Primary	Address Type	Address
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Email	admin@faxcore.com
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Printer	Phaser 8560N PS

- *Print messages from the Message Viewer.*

View Image | View Details | View History | Save As | TIF | **Print...** | Select Action: ▾

☐ Select All Thumbnails

Page #: 1

Print Local  
Print to Network

**Fax Transmissi**

**Attention to:-**  
Name: Jeremy Tan  
Company:  
Date: 2012-02-20  
Time: 09:54:40 P  
**RE: testinboudnnotification\_disabled**

**From:-**  
Name: abcdefg  
Company: Company Name  
Telephone: +1 (234) 5555  
Pages: 1

Comments/Notes:

## Working with Outbound Faxes

FaxFinder provides various methods to send outbound faxes.

### Print to Fax (FaxFinder Print Driver)

Users can print to FaxFinder Print Driver from a native application such as Microsoft Word, Excel, Quickbooks, etc. to submit a fax to FaxFinder. Refer to [FaxFinder User Manual](#) for more details.

### Web UI

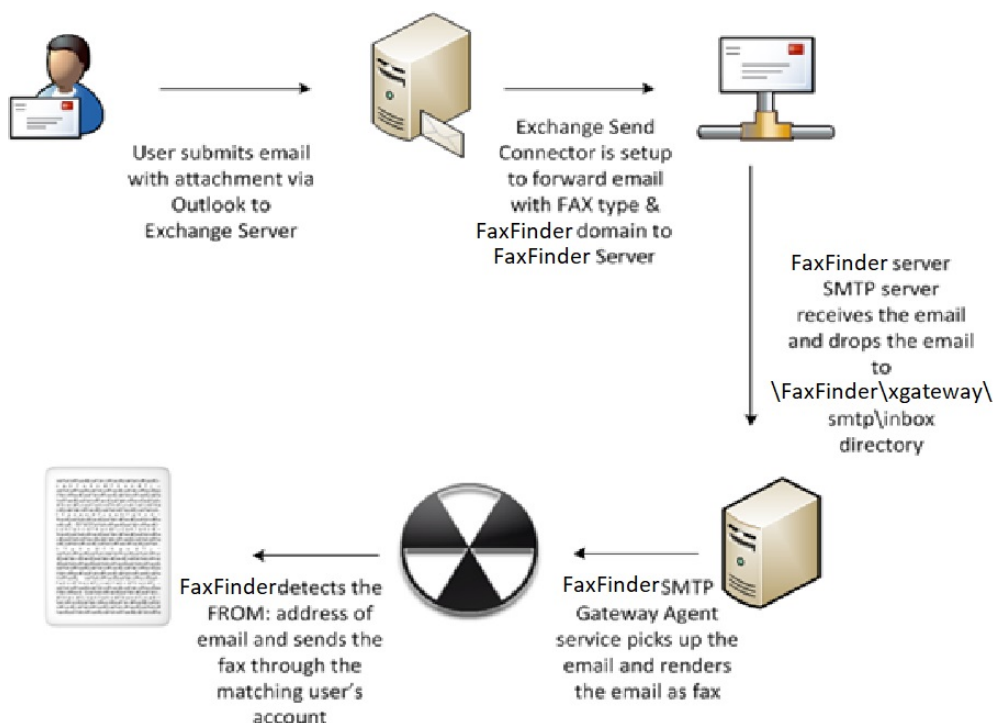
Users can logon to FaxFinder Web User Interface to submit a fax/message by attaching documents. Refer to [FaxFinder User Manual](#) for more details.

### Email to Fax

#### *Introduction*

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



The above diagram illustrates the complete workflow of FaxFinder email to fax feature. This section covers configuration and setting up FaxFinder 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 FaxFinder 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 FaxFinder to be sent out as fax.

#### Basic SMTP email format:

[faxnumber@fax.yourdomainname.com](mailto:faxnumber@fax.yourdomainname.com)  
(e.g. [+1-720-870-4141@fax.FaxFinder.com](mailto:+1-720-870-4141@fax.FaxFinder.com))

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

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

#### Outlook Business Fax Address format:

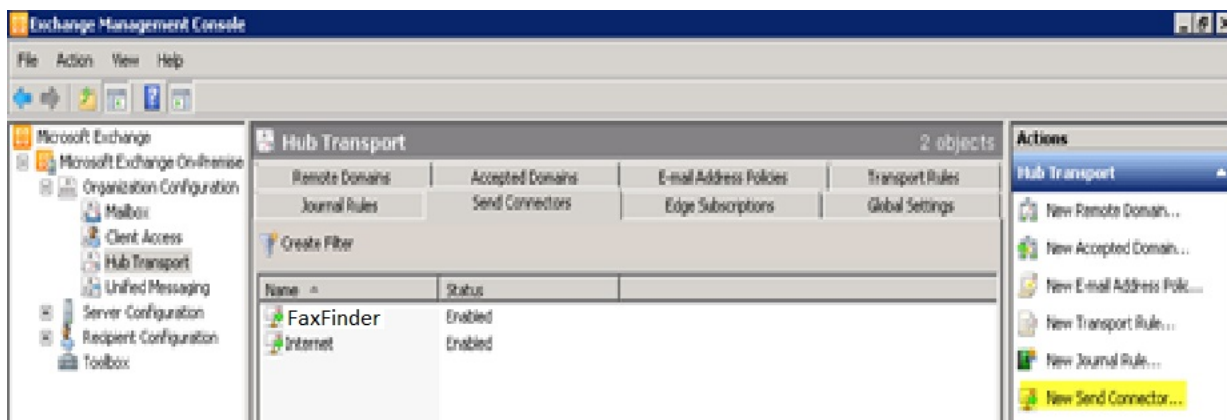
[\[FAX:Name@Number@Company\]](mailto:[FAX:Name@Number@Company])  
(e.g. [\[FAX: Tom Linhard@+1-720-870-4141@FaxFinder\]](mailto:[FAX: Tom Linhard@+1-720-870-4141@FaxFinder]))

## Setup Exchange Server Send Connector/SMTP Connector

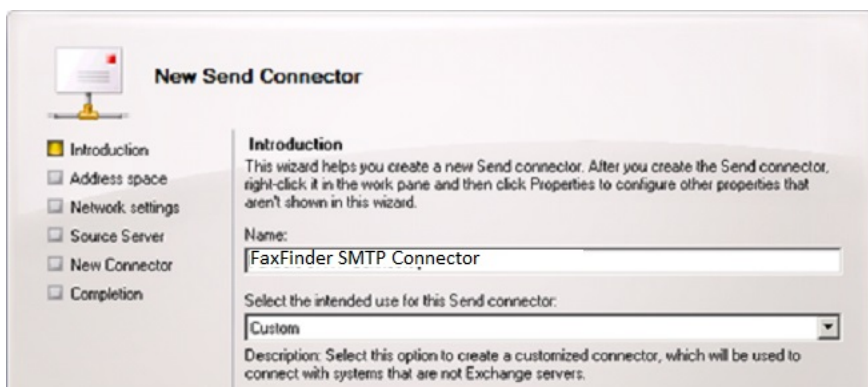
Exchange 2007 / 2010

**Step 1: Add a 'Send Connector' to Microsoft Exchange 2007 server for the address space: 'fax.FaxFinder.com' (Substitute fax FaxFinder.com for your domain name)**

1. Open the **Exchange Management Console > Organization Configuration > Hub Transport**.
2. Under 'Actions' select '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: 'FaxFinder 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'.

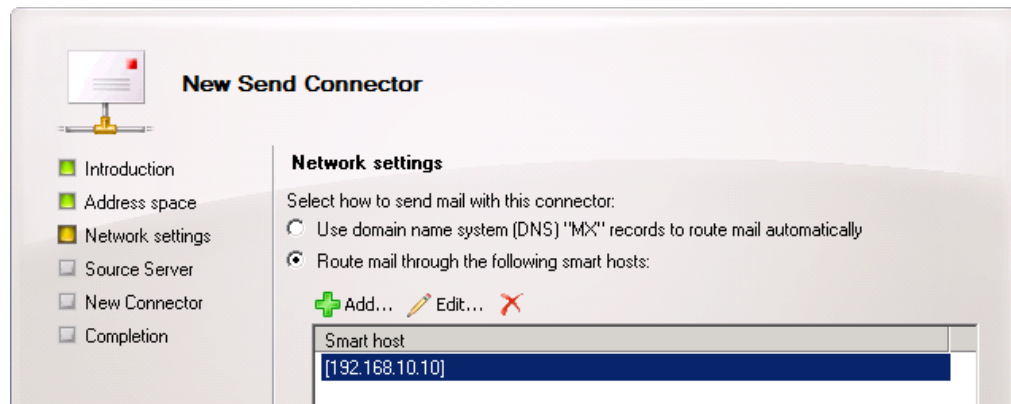


5. In the 'Address space' screen click on 'Add' and enter 'fax.FaxFinder.com' (replace 'fax.FaxFinder.com with your domain name). Click 'Ok'.

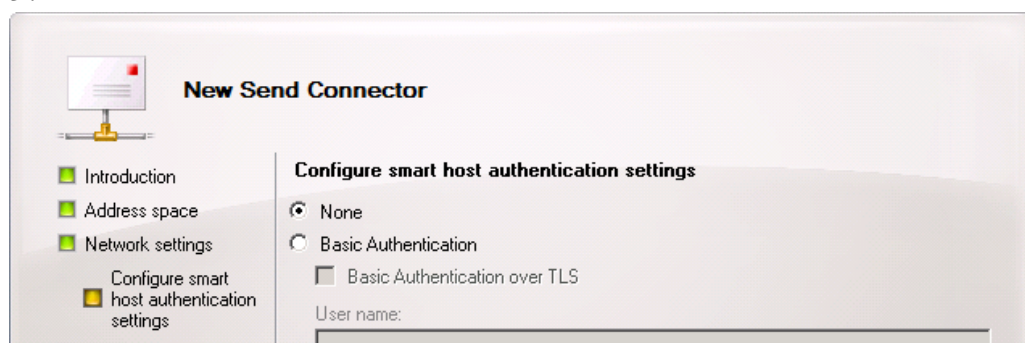
6. Ensure that the address space created has the default 'Type' of 'SMTP', and click 'Next'.



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 FaxFinder is installed and click 'Next'.



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



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 in order to create the 'Send Connector'.

When the Send Connector Wizard is complete, the FaxFinder 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 FaxFinder 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 ALL 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.*

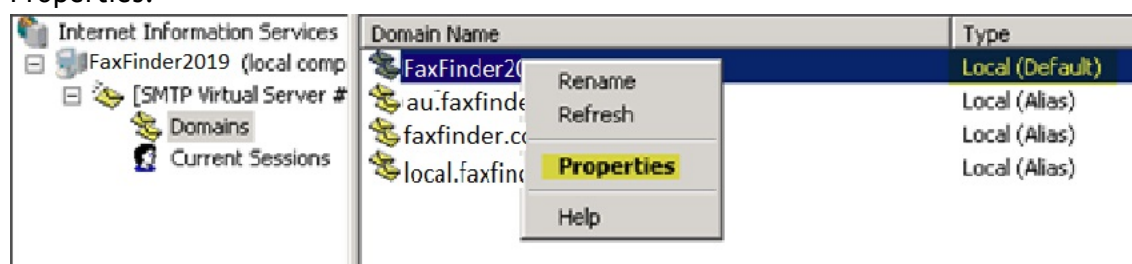
### Setup FaxFinder Server SMTP service to drop to SMTP gateway folder

#### Step 1: Setup Default SMTP Drop Folder

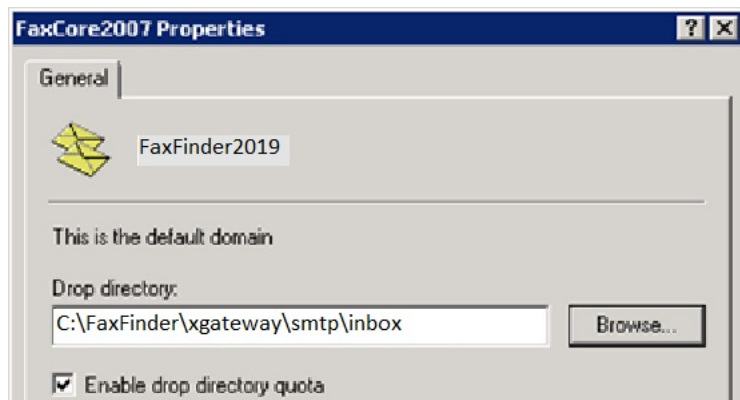
1. On the FaxFinder server, navigate to Start Menu > Administrative Tools > Internet Information Services (6.0) Manager.
2. Expand SMTP Virtual Server and select Domains. On the right pane, locate the Default Domain Name (should be your FaxFinder server name) > right click on it and select



Properties.

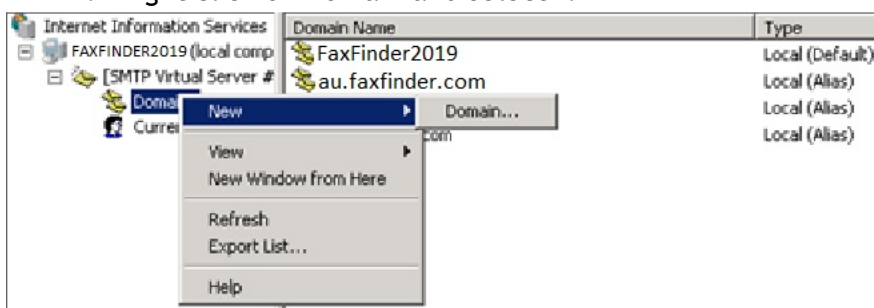


3. Click on Browse and browse to FaxFinder install directory\xgateway\smtp\inbox as shown in the next screen.

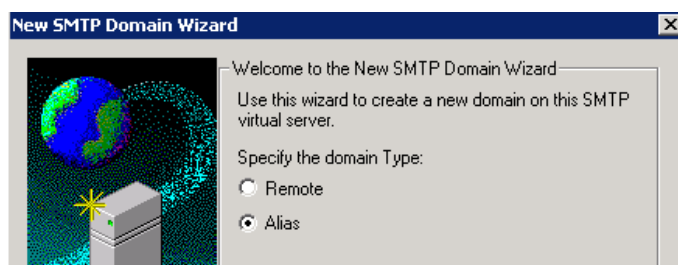


### Step 2: Add SMTP domain names

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



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



3. 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 2007 server for the address space: 'fax.FaxFinder.com' \(Substitute fax FaxFinder.com for your domain name\)\)](#))
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 \FaxFinder\ directory provides administrator to configure the following options:

```
<SMTPGateway>
  <SMTP>
    <add key="baseDirectory" value="xgateway\smtp"/>
    <add key="inboxDirectory" value="xgateway\smtp\inbox"/>
    <add key="treatEmailBodyAsDocument" value="0"/>
    <add key="faxAsRaw" value="0"/>
    <add key="inBodyAuth" value="0"/>
    <add key="maxAttempts" value="2"/>
    <add key="attemptIntervalSec" value="30"/>
    <add key="removePrefix" value="FAX"/>
    <add key="bufferSize" value="16384"/>
    <add key="IMESEQ" value="NAME@ADDR@COMPANY"/>
    <add key="BackupTimerInterval" value="1000"/>
  </SMTP>
</SMTPGateway>
```

Key	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
treatEmailBodyAsDocument	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 coverage. (0 = NO, 1 = YES)	0
inBodyAuth	Specifies whether to use authentication in email body. (0 = NO, 1 = YES).  If set to yes, email body must contain the following on the first line of the email body: [user: Encryptedpass]  Example: [jdoe: 0PjIJYa6udJtQGQ0L1FwnCr5tv0ZxAHK]  To encrypt the password, use <a href="http://FaxFinderserver/_debug/testencrypt.aspx">http://FaxFinderserver/_debug/testencrypt.aspx</a>	0
maxAttempts	Maximum number of retries on failures before considering the email has failed with exceptions.	2

Key	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 FXC3.SMTPGatewayAgent service with Windows Management Console.

## File Gateways

### Configuring FaxFinder 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.

FaxFinder supports the following gateway out of the box:

- Control file
- Embedded codes
- Embedded codes for PCL
- Embedded codes for PDF
- HP Digital Sender
- SAP
- FujiXerox XST
- Oracle
- Xerox DOC XST

Custom gateway is a reflection of 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 FaxFinder installation. Each set of processing directories must have its own section (profile) in the config file.

The following parameters can be configured for each gateway profile:

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\ controlfile
inboxDirectory	The full path to the inbox directory where files are placed to be processed. May contain UNC directories.	Yes	xgateway\ controlfile \inbox
processFileMask	The file mask indicating the files the directory monitor should scan for processing.	Yes for control file gateways	*.ctl
defaultUserName	The default FaxFinder user to assign to created messages. Every message in FaxFinder must be owned by a FaxFinder 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 FaxFinder server.	No	em-codes
allowAnonymous Users	Indicates that FaxFinder 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 exist in FaxFinder, the gateway processor will throw an Unauthorized error.	No	1

userNamePrefix	Indicates a prefix that prefixes any username field. FaxFinder will strip off this prefix before identifying the FaxFinder 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
binaryDataStartIndex	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	
preserveCodesInOutput	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 FaxFinder parsers. Set to 1 to treat as raw, or 0 to have FaxFinder parse the numbers.	No	0
includeSenderNotification	Indicates if FaxFinder should include the default notifications set up in the FaxFinder user profile.	Yes	0
includeSenderCoverPage	Indicates if FaxFinder should include the default cover page(s) set up in the FaxFinder user profile.	Yes	0
maxAttempts	The maximum attempts to try to process a single file.	Yes	2
attemptIntervalSec	Delay in seconds between each attempt.	Yes	30

### Step 2: Enabling the Directory Monitor

The Directory Monitor is invoked through the GatewayAgent service. The GatewayAgent is configured in the **GatewayAgent.exe.config** file at the root directory of the FaxFinder installation. To enable automatic processing of a gateway, you can edit the corresponding entries to the FaxFinder 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="embeddedCodesPcl" value="1"/>
```

```

<add key="embeddedCodesPDF" value="1"/>
<add key="hpDigitalSender" value="0"/>
<add key="SAP" value="1"/>
<add key="FujiXeroxXST" value="1"/>
<add key="Oracle" value="1"/>
<add key="Xerox" value="1"/>
</TYPE>

```

### *Step 3: Restart the FaxFinder Gateway*

The FaxFinder Gateway (FXC3.Gateway) must be restarted in order to pick up the changes made in step 2 above. Restart the FXC3.Gateway service using Windows 2003/2008 Service Control Manager.

### *Defining a New Gateway Specification*

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

## PCL Print Spooler

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

### *Configuring FaxFinder to Process Print Streams with Embedded Codes*

This consists of two steps:

1. Installing FaxFinder PCL Print Spooler service.
2. Configuring the FaxFinder GatewayAgent to process PCL embedded codes.

### *Installing FaxFinder PCL Print Spooler Service*

Download and run FaxFinderPCLPrintSpooler.msi. Follow the on-screen instruction to install the FaxFinder PCL Print Spooler service to the FaxFinder installation directory.

After installation, a new service called FXC3.PCLPrintSpooler is created on the system and started automatically.

### *Configuring FaxFinder GatewayAgent to process PCL Embedded Codes.*

To configure FaxFinder GatewayAgent to process PCL Embedded Codes, open and edit the GatewayAgent.exe.config file located at the FaxFinder installation root folder - e.g., C:\FaxFinder\ - 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 FaxFinder process the incoming print streams from the FaxFinder 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 FaxFinder 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 \FaxFinder\xgateway\embeddedCodesPcl\inbox directory.

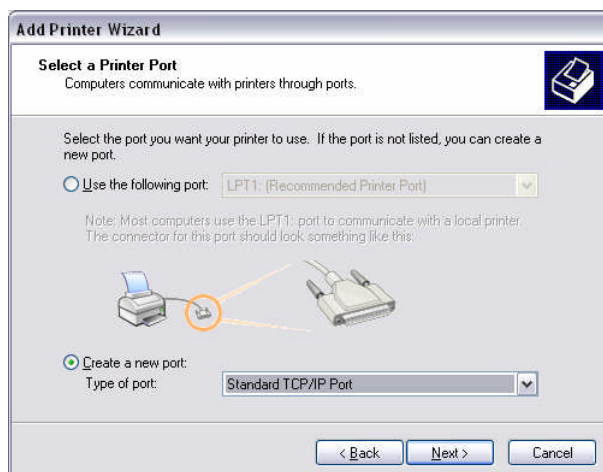
### *Installing FaxFinder PCL Printer*

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

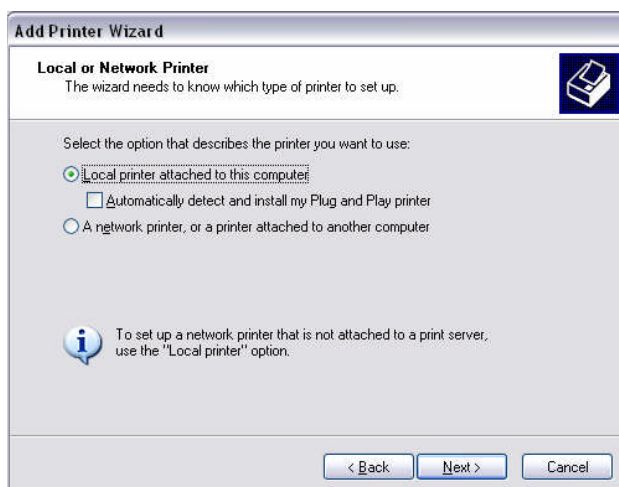




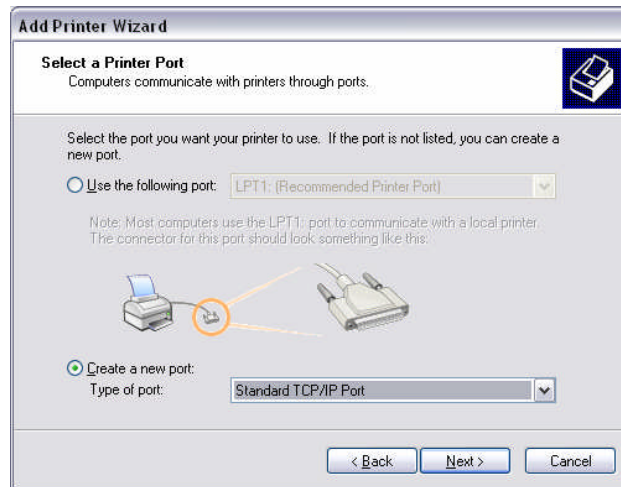
Click **Next**.



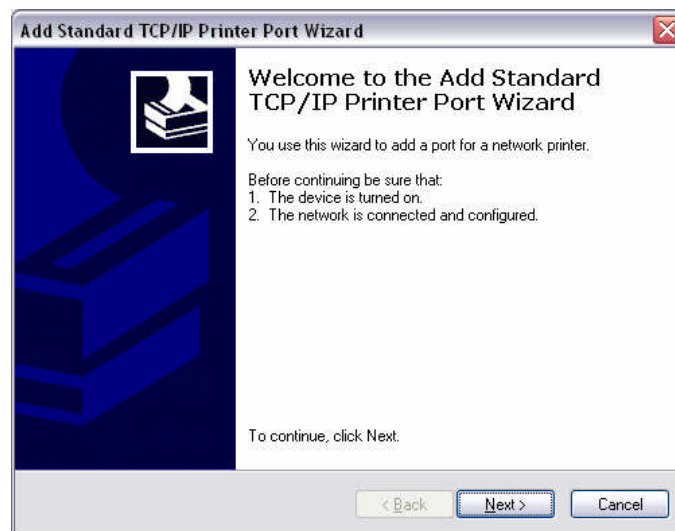
Select **Local Printer**.



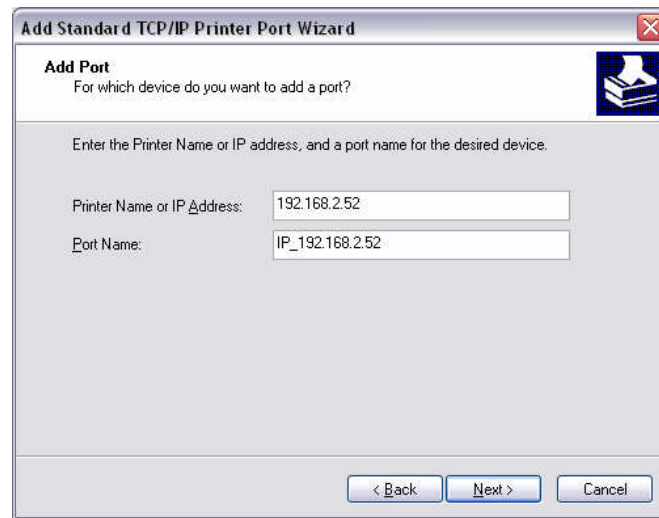
Select Standard TCP/IP Port.



Configuring the TCP/IP Port.



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



**Add Standard TCP/IP Printer Port Wizard**

**Add Port**  
For which device do you want to add a port?

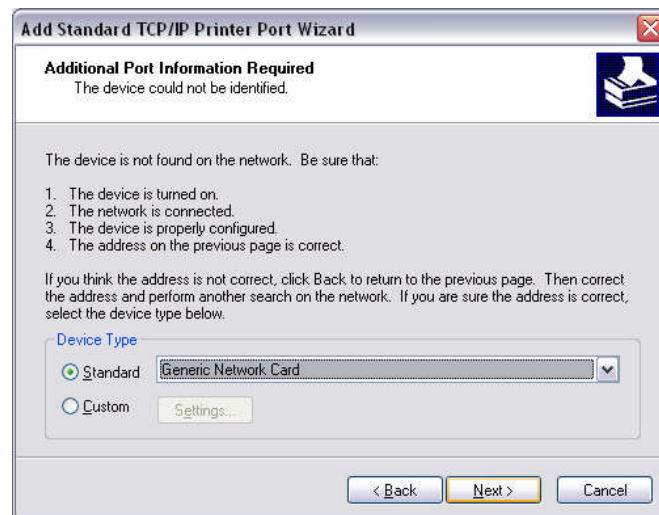
Enter the Printer Name or IP address, and a port name for the desired device.

Printer Name or IP Address: 192.168.2.52

Port Name: IP\_192.168.2.52

< Back   Next >   Cancel

Click **Next** and Select **Generic Network Card**.



**Add Standard TCP/IP Printer Port Wizard**

**Additional Port Information Required**  
The device could not be identified.

The device is not found on the network. Be sure that:

1. The device is turned on.
2. The network is connected.
3. The device is properly configured.
4. The address on the previous page is correct.

If you think the address is not correct, click Back to return to the previous page. Then correct the address and perform another search on the network. If you are sure the address is correct, select the device type below.

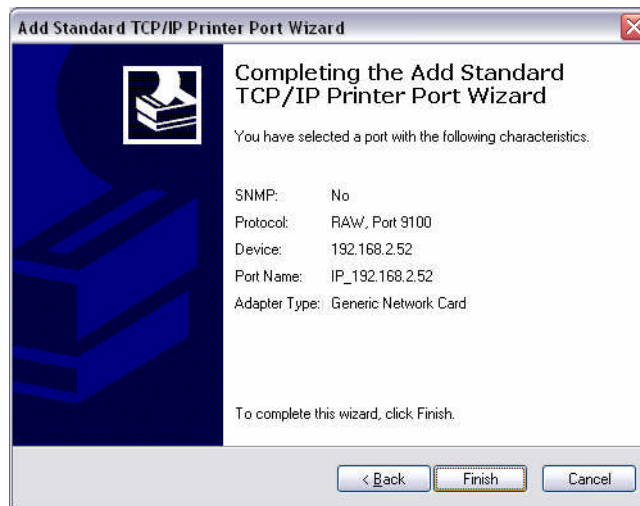
Device Type

☒ Standard   Generic Network Card

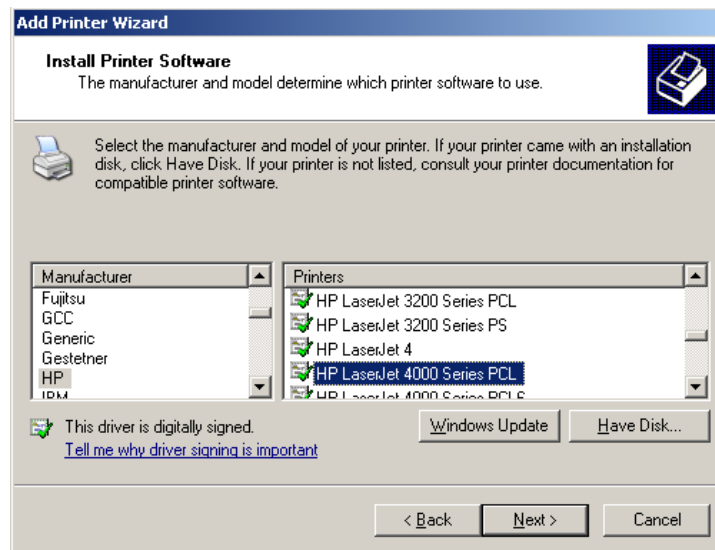
☐ Custom   Settings...

< Back   Next >   Cancel

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



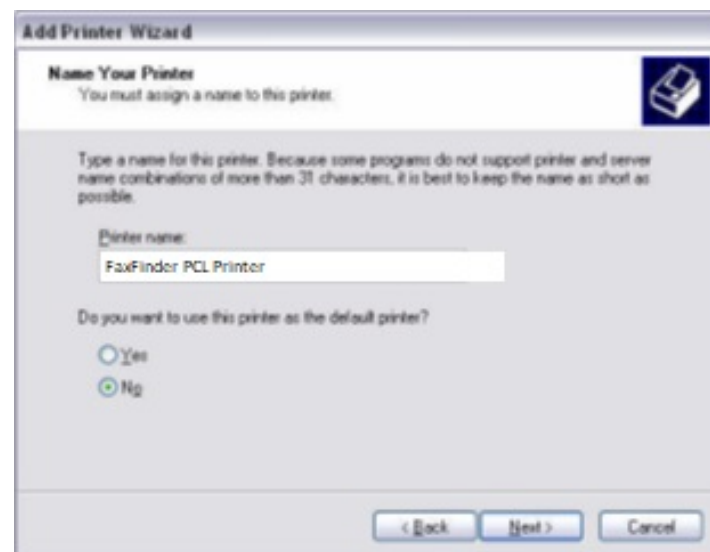
The Install Printer Software screen appears.



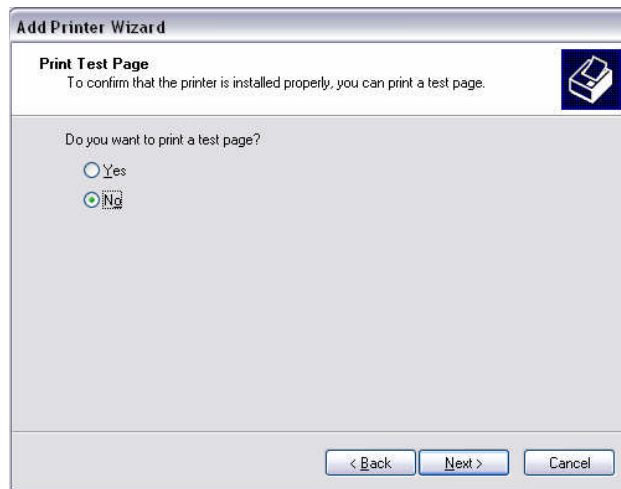
Recommend selecting **HP** for **Manufacturer**, then select the HP LaserJet 4000 PCL printer.



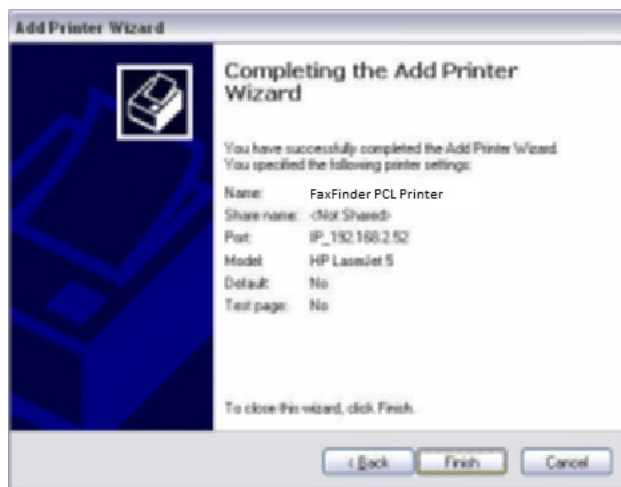
If the driver exists, select **Keep existing driver**.



Give the printer a name - e.g. **FaxFinder PCL Printer**.



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



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

## Working with Blacklist Publications & Subscriptions

FaxFinder 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.

**Black List Publication**

Name: Do Not Dial List

Creator: ADMIN

Description:

Activate: Yes

**Entries**

Dial String:  ☒ Active

<input type="checkbox"/>	<input checked="" type="checkbox"/> Dial String	Active
<input type="checkbox"/>	999	Yes
<input type="checkbox"/>	911	Yes

Page size: 15 2 items in 1 pages

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 Add, example “911, 999, etc.”

“\*” (wildcard) is not supported. FaxFinder compares the dial string from left to right only (numbers starting with the Dial String)

Blacklisted Dial String: 999

User Input Dial String: 9991114444

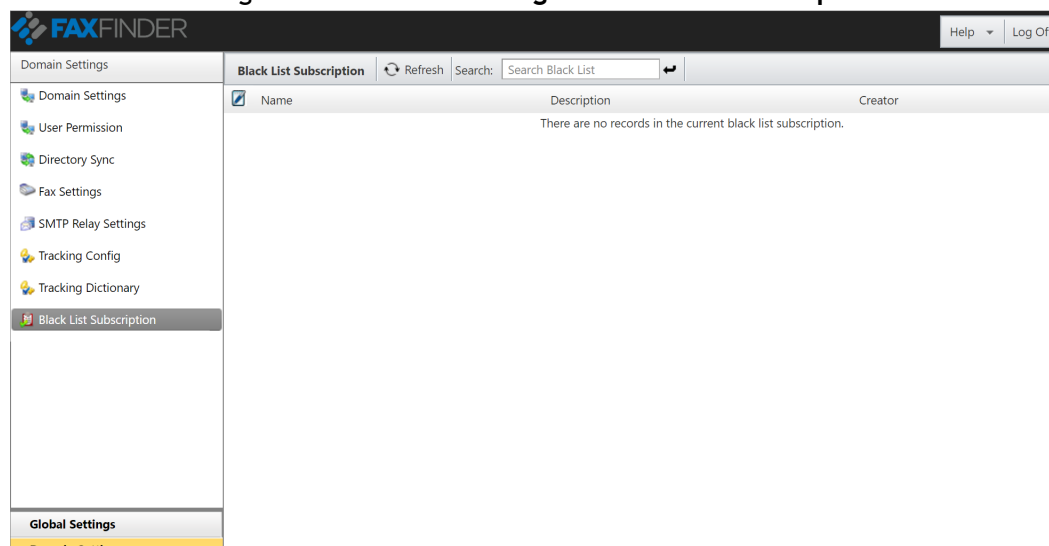
Match Blacklist: Yes

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

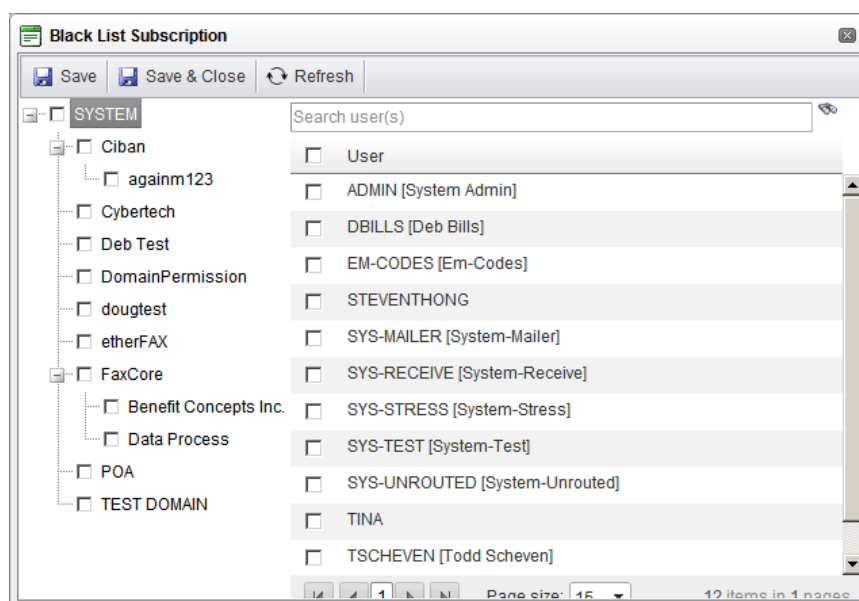
Next, click “Save & Close” when done adding numbers to the blacklist.

## Subscribe Users to a Blacklist Publication

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



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



- 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.
- Click "Save and Close" when done selecting users for the subscription.
- Users subscribed to the Blacklist publication will now be blocked from sending to the numbers listed in the publication.



## Working with Tracking Keys

FaxFinder 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:

The screenshot displays the 'New Message' form in FaxFinder. The form is divided into several sections:

- Sender Profile:** Includes fields for 'From' (System Admin) and 'Company'.
- Message Info:** Includes fields for 'Subject', 'Notes', and a 'Priority' dropdown menu set to 'Lowest'.
- Tracking Info:** A section on the right with a 'Tracking No.' input field.
- Recipients:** A section at the bottom left with tabs for 'Recipients', 'Documents', and 'Options'. It includes sub-tabs 'Add Generic', 'Add Contact', and 'Add User'. The 'Generic Recipient' section contains fields for 'Name', 'Company', 'Delivery' (set to 'FAX'), 'Fax #' (with a '+1' prefix and 'Area'/'Local Number' sub-fields), and 'Notify Email' (username@domain.com).
- Table:** A table on the right side of the 'Recipients' section with columns: 'NS', 'NE', 'Name', 'Company', 'Delivery Address', and 'Notify Address...'. It displays 'No records to display.'
- Footer:** Includes pagination controls (back, forward, page 1 of 1), 'Page size: 15', and '0 items in 1 pages'.

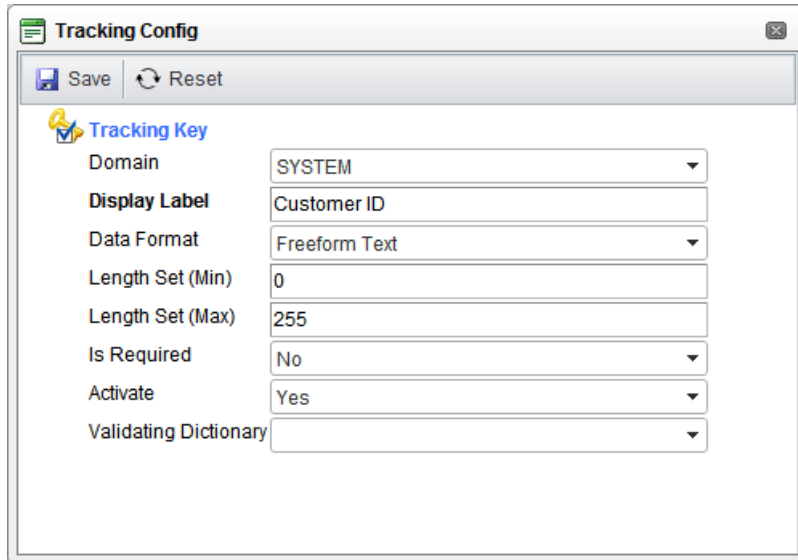
However, this tracking function can be extended and manipulated by administrators to:

- 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 > Tracking Config** and select **“New”**



The screenshot shows a window titled "Tracking Config" with a "Save" button and a "Reset" button. Below these is a "Tracking Key" section with a plus icon. The fields are as follows:

Field	Value
Domain	SYSTEM
Display Label	Customer ID
Data Format	Freeform Text
Length Set (Min)	0
Length Set (Max)	255
Is Required	No
Activate	Yes
Validating Dictionary	

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 field 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		Send
<b>Sender Profile</b> <b>From</b> System Admin <b>Company</b>		<b>Tracking Info</b> <b>Tracking No.</b> <b>Customer ID</b>
<b>Message Info</b> <b>Subject</b> <b>Notes</b> <b>Priority</b> Lowest		
<b>Recipients</b>   Documents   Options		
Add Generic   Add Contact   Add User		✖ NS NE Name Company Delivery Address Notify Addre...
<b>Generic Recipient</b> <b>Name</b> <b>Company</b> <b>Delivery</b> FAX <b>Fax # *</b> +1 Area Local Number <b>Notify Email</b> username@domain.com		No records to display.

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**

Domain Settings		Domain Settings	Save	Apply All
Domain Settings User Permissions Directory Sync Fax Settings SMTP Relay Settings Tracking Config Tracking Dictionary Black List Subscription	<b>Configure Domain</b> SYSTEM	<b>Message Settings</b> <b>Approval User</b> <b>Maximum Tracking Key</b> 3		
	<b>Notification Delivery Templates</b> Send Delivery Message send success Message send error Message receive success Message receive error Recipient receive success Recipient receive error Message assign receive notification Message forward receive notification Send password notification Message print template Approval Request Notification Approved Reply Notification Rejected Reply Notification	delivery (SYSTEM) notifyMessageSendSuccess (SYSTEM) notifyMessageSendFailed (SYSTEM) notifyMessageReceiveSuccess (SYSTEM) notifyMessageReceiveFailed (SYSTEM) notifyRecipientReceiveSuccess (SYSTEM) notifyRecipientReceiveFailed (SYSTEM) notifyMessageAssignReceive (SYSTEM) notifyMessageForwardReceive (SYSTEM) sendPassword (SYSTEM) delivery (SYSTEM) notifyMessageApprovalRequest (SYSTEM) notifyMessageApprovalApproved (SYSTEM) notifyMessageApprovalNotApproved (SYSTEM)		

## Create Tracking Dictionary

1. Navigate to **Domain Settings > Tracking Dictionary** and click on “New”

**Tracking Details**

Name: Customer ID List

Domain: SYSTEM

Visibility: Public

Active: Yes

**Dictionary Entries**

<input type="checkbox"/>	<input type="checkbox"/>	Name	Value	Entry Type
<input type="checkbox"/>	<input type="checkbox"/>	CUS0001	CUS0001	Normal
<input type="checkbox"/>	<input type="checkbox"/>	CUS0002	CUS0002	Normal
<input type="checkbox"/>	<input type="checkbox"/>	CUS0003	CUS0003	Normal
<input type="checkbox"/>	<input type="checkbox"/>	CUS0004	CUS0004	Normal

**Add Entry**

2. Enter a name for the Tracking Dictionary, example: “Customer ID list”.
3. Choose the domain for this Tracking Dictionary to be created for and Set the Visibility to “Public”.
4. 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 “Add Entry” to add the entry. Repeat this step to keep adding additional entries to the list.
5. Click on “Save” when done adding entries to the list.
6. To associate the newly created Tracking Dictionary to a Tracking Key, navigate to **Domain Settings > Tracking Key**. Double click on the Tracking Key you want to associate the Tracking Dictionary to edit the Tracking Key.

**FAXFINDER** Help Log Off

Domain Settings Tracking Config New Delete Refresh

Configure Domain SYSTEM

Seq	Created	Modified	Display Label	Data Format	Min Length Set	Max Length Set	Required	Active
1	10-29-2009 07:17:01	10-29-2009 07:17:01	Tracking No.	Freeform Text	0	255	No	Yes

**Tracking Config** Save Save & Close Reset

**Tracking Key**

Display Label Tracking No.

Data Format Freeform Text

Length Set (Min) 0

Length Set (Max) 255

Is Required No

Activate Yes

Validating Dictionary

Page size: 15

7. Select the Tracking Dictionary we've created earlier as the Validating Dictionary and then "Save".
8. 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** Send

**Sender Profile**

From System Admin

Company

**Message Info**

Subject

Notes

Priority Lowest

**Tracking Info**

Tracking No.

Customer ID CUS0001

CUS0001

CUS0002

CUS0003

CUS0004

**Recipients** Documents Options

Add Generic Add Contact Add User

**Generic Recipient**

Name

Company

Delivery FAX

Fax # +1 Area Local Number

Notify Email username@domain.com

NS	NE	Name	Company	Delivery Address	Notify Address
No records to display.					



## FaxFinder Notifications

FaxFinder can notify users when the following events happen:

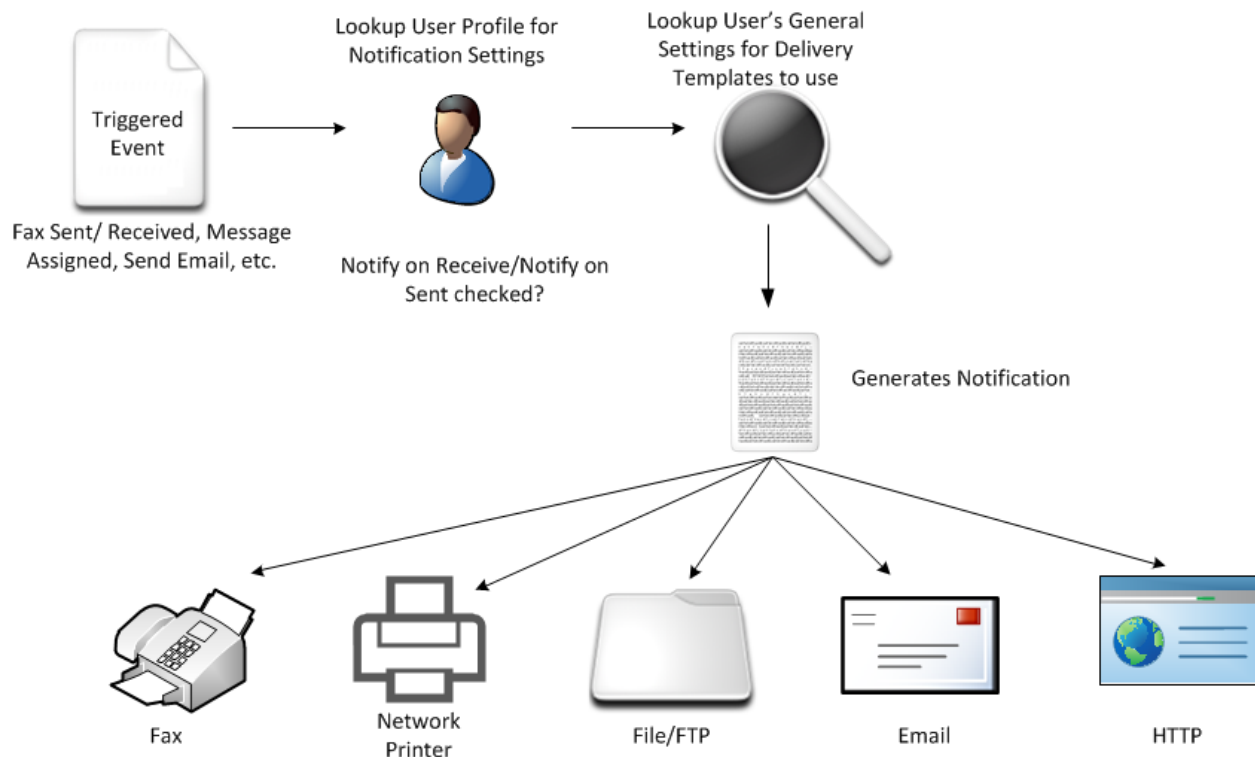
- Send delivery
- Message send success
- Message send error
- Message receive success
- Message receive error
- Recipient receive success
- Recipient receive error
- Message assign receive
- Message forward receive
- Send password
- Message print
- Approval request
- Approved reply
- Rejected reply

## 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
HTTP	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 FaxFinder 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 > 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**.

Notification Type	Template	Checked
Send Delivery	delivery (SYSTEM)	<input checked="" type="checkbox"/>
Message send success	notifyMessageSendSuccess (SYSTEM)	<input checked="" type="checkbox"/>
Message send error	notifyMessageSendFailed (SYSTEM)	<input checked="" type="checkbox"/>
Message receive success	notifyMessageReceiveSuccess (SYSTEM)	<input checked="" type="checkbox"/>
Message receive error	notifyMessageReceiveFailed (SYSTEM)	<input checked="" type="checkbox"/>
Recipient receive success	notifyRecipientReceiveSuccess (SYSTEM)	<input checked="" type="checkbox"/>
Recipient receive error	notifyRecipientReceiveFailed (SYSTEM)	<input checked="" type="checkbox"/>
Message assign receive notification	notifyMessageAssignReceive (SYSTEM)	<input checked="" type="checkbox"/>
Message forward receive notification	notifyMessageForwardReceive (SYSTEM)	<input checked="" type="checkbox"/>
Send password notification	sendPassword (SYSTEM)	<input checked="" type="checkbox"/>
Message print template	delivery (SYSTEM)	<input checked="" type="checkbox"/>
Approval Request Notification	notifyMessageApprovalRequest (SYSTEM)	<input checked="" type="checkbox"/>
Approved Reply Notification	notifyMessageApprovalApproved (SYSTEM)	<input checked="" type="checkbox"/>
Rejected Reply Notification	notifyMessageApprovalNotApproved (SYSTEM)	<input checked="" type="checkbox"/>

*Description of Notification Events*

Notification Event/Actions	Description	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.	FaxFinder User
Message send error	User sends a message with a failure/errors	FaxFinder User
Message receive success	User receives a fax/a fax is routed to the user successfully	FaxFinder User
Message receive error	User receives a fax with failure	FaxFinder 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	FaxFinder User
Message forward receive notification	User is forwarded a fax	FaxFinder User
Send password notification	User requested re-send of password by clicking on “Forgot Password” link	FaxFinder User
Message print template	User prints to a network printer	Printed Document
Approval request notification	Approval required for a fax	FaxFinder Approval User
Approved reply notification	A fax is approved	FaxFinder User

Notification Event/Actions	Description	Notification Recipient
Rejected reply notification	A fax is not approved	FaxFinder User

### Creating Delivery Templates

FaxFinder 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 **New** button:

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

Save As New
 Save
 Save & Close
 Reset

**Templates General Information**

**Name** 
**Domain**

**Description** 
**Visibility**

**Fax** | Email | HTTP | FTP | File | Print

**Border Text 1** 
**Location**

**Border Text 2** 
**Location**

**Border Text 3** 
**Location**

**Border Text 4** 
**Location**

**Subject**

**Notes**

*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.XMIT. 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	\$\$MESSAGE.XSACT.TRANSACTION_ID\$\$.\$\$MESSAGE.XSACT.ADD RESS_FORMAT_TYPE\$\$

Body	Email body/content	<b>Delivery Information:</b>	
		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	\$\$MESSAGE.XSACT.TRANSACTION_ID\$\$\$.DOCUMENT.\$\$MESSAGE.XSACT.ADDRESS_FORMAT_TYPE\$\$
Report Query String	String to include with the HTTP Post	?MsgID=\$\$MESSAGE.ID\$\$&TrackingKey=\$\$MESSAGE.TRACKING_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	\$\$MESSAGE.ID\$\$\$. \$\$MESSAGE.XSACT.ADDRESS_FORMAT_TYPE\$\$
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

*Print*

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

*Working Scenarios of FaxFinder 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 FaxFinder server.*

**Notification Event:** *Message receive success*

**Delivery Template:** *MessageReceiveSuccess (SYSTEM)*

**User:** *SYS-UNROUTED*

**Step 1:** Navigate to **Domain Management > Delivery Templates** and double 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\$\$*

Save As New
 Save
 Save & Close
 Reset

**Templates General Information**

**Name**

**Description**

Domain

SYSTEM

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

Report File Name

Report Body

## User General Settings:

The screenshot shows the 'General Settings' tab for a user profile. It features a 'Notification Delivery Templates' section with four rows, each containing a label, a dropdown menu, and a checkbox.

Label	Dropdown Value	Checkbox
Send Delivery	delivery (SYSTEM)	<input checked="" type="checkbox"/>
Message send success	notifyMessageSendSuccess (SYSTEM)	<input checked="" type="checkbox"/>
Message send error	notifyMessageSendFailed (SYSTEM)	<input checked="" type="checkbox"/>
Message receive success	notifyMessageReceiveSuccess (SYSTEM)	<input checked="" type="checkbox"/>

## User Profile:

The screenshot shows the 'User Profile' tab. It includes a 'User Info' section with various fields and a table of 'Addresses'.

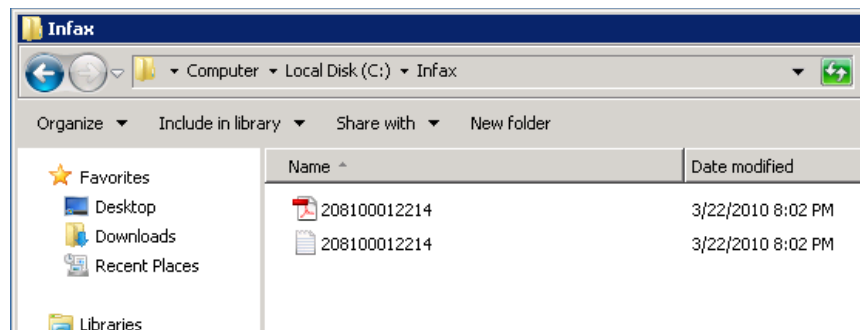
**User Info**

User Name	SYS-UNROUTED
User Role	STANDARD USER
Authentication Type	Internal
Is Active	Yes
Display Name	System-Unrouted
First Name	System
Middle Name	
Last Name	Unrouted
Prefer Address Type	FILE
Description	

**Addresses**

	NOR	NOS	Primary	Address Type	Address
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	File	c:\infax\

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



## Working with Address Books

### User Private Address Books

Users can create their own Address books from the FaxFinder Web User Interface. Refer to [FaxFinder User Manual](#) 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 Books 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 FaxFinder address book that stores contacts on FaxFinder 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 **“New”**

### *Load external contact data from CSV file*

The screenshot shows the 'Address Book Editor' window. The 'Configure Domain' dropdown is set to 'SYSTEM'. The 'Address Book Name' is 'CSV Address Book'. The 'Description' field is empty. 'Visibility' is set to 'Global'. 'Address Book Type' is 'External'. 'Connection Type' is 'OleDb Connection'. The 'Connection String' is 'Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\Extended Properties="text;HDR=Yes;FMT=Delimited";'. The 'Query Expression' is 'SELECT DisplayName as xDisplayName, CompanyName as xCompanyName, Fax as xAddress FROM Contacts\_01\_CSV.csv'. Below the query expression, there is a note: '\* the variables @username can be used in query expressions to limit the query. Eg: select \* from tcontacts where xName like @username'. There are input fields for '@username' and '@filter'. At the bottom, a note states: '\* @username 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 FaxFinder 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.

	A	B	C	D	E	F
1	DisplayName	FirstName	MiddleName	LastName	CompanyName	Desc
2	Koch Christine	Koch	KC	Christine	FaxFinder 1	Prototype Data
3	West Paul	West	WP	Paul	FaxFinder 2	Prototype Data
4	Clark Molly	Clark	CM	Molly	FaxFinder 3	Prototype Data
5	Sprenger Christof	Sprenger	SC	Christof	FaxFinder 4	Prototype Data
6	Schleger Yvonne	Schleger	SY	Yvonne	FaxFinder 5	Prototype Data
7	Nash Mike	Nash	NM	Mike	FaxFinder 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"

Save
 Save & Close
 Test
 Read Data
 Reset

External source is connected successfully.

Select Domain
   
 Configure Domain

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

Read External Data Source						
Display Name	Company Name	Address	Address Type	Notify Address	NS	NE
Koch Christi	FaxFinder 1	60-3-33249226	2		No	No
West Paul	FaxFinder 2	60-3-33249227	2		No	No
Clark Molly	FaxFinder 3	60-3-33249228	2		No	No
Sprenger Ct	FaxFinder 4	60-3-33249229	2		No	No
Schleger Yv	FaxFinder 5	60-3-33249230	2		No	No

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.

The screenshot shows the 'Address Book Editor' window. The 'Configure Domain' dropdown is set to 'SYSTEM'. The 'Address Book Name' is 'externalAddressBook'. The 'Description' field is empty. 'Visibility' is set to 'Global'. 'Address Book Type' is 'External'. 'Connection Type' is 'OleDb Connection'. The 'Connection String' is 'Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\externalAddressBook.mdb'. The 'Query Expression' is 'SELECT A as xDisplayName, E as xCompanyName, Q as xAddressTypeID, H as xAddress, G as xNotifyAddress, R as xlsRRSon, S as xlsRRFOn FROM importContactsTable'. Below the query, there is a note: '\* the variables @username can be used in query expressions to limit the query. Eg: select \* from tcontacts where xName like @username'. There are input fields for '@username' and '@filter'. At the bottom, a note states: '\* @username 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 FaxFinder 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 xlsRRSon, S as xlsRRFOn 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.

importContactsTable							
ID	A	B	C	D	E	F	
2	James May	James	JM	May	Faxcore Central	TG	
3	Jason Plato	Jason	JP	Plato	Faxcore Central	FG	
4	Jeremy Clarksc	Jeremy	JC	Clarkson	Faxcore Central	TG	
5	Jon Bentley	Jon	JB	Bentley	Faxcore Central	FG	
6	Richard Hammi	Richard	RH	Hammond	Faxcore Central	TG	
7	Tiff Needell	Tiff	TN	Needell	Faxcore Central	FG	
8	Tom Ford	Tom	TF	Ford	Faxcore Central	FG	
9	Vicki Hendersc	Vicki	VH	Henderson	Faxcore Central	FG	

### Load external contact data from SQL server

Save
 Save & Close
 Test
 Read Data
 Reset

**Select Domain**

Configure Domain
 

SYSTEM

**Address Book Editor**

Address Book Name
 

SQL Addresss Book

Description

Visibility
 

Global

Address Book Type
 

External

Connection Type
 

OleDb Connection

Connection String
 

Provider=sqloledb;Data Source=SQLProd01;Initial Catalog=dbAddressbook;User Id=fxc\_admin;Password=#####;

Query Expression
 

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

\* the variables @username can be used in query expressions to limit the query.  
 Eg: select \* from tcontacts where xName like @username

@username

@filter

\* @username 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.zCo	
	xName	xCompany	xFax
	John Doe	Contoso	1-555-444-1234
	Jane Doe	Contoso	1-222-333-4444
►*	NULL	NULL	NULL

## Importing Contacts from CSV

System administrators and users can import contacts from an external data file into a Global/Public FaxFinder 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**.

## 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 FaxFinder, or you can specify your own format. In the **Header Format** input field, select **FaxFinder Default Import Header** to use the FaxFinder 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 FaxFinder 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.
FirstName	Contact's first name.
MiddleName	Contact's middle name.

Data Field Name	Description
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 FaxFinder 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 FaxFinder

### FaxFinder 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 FaxFinder 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.

## FaxFinder 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.

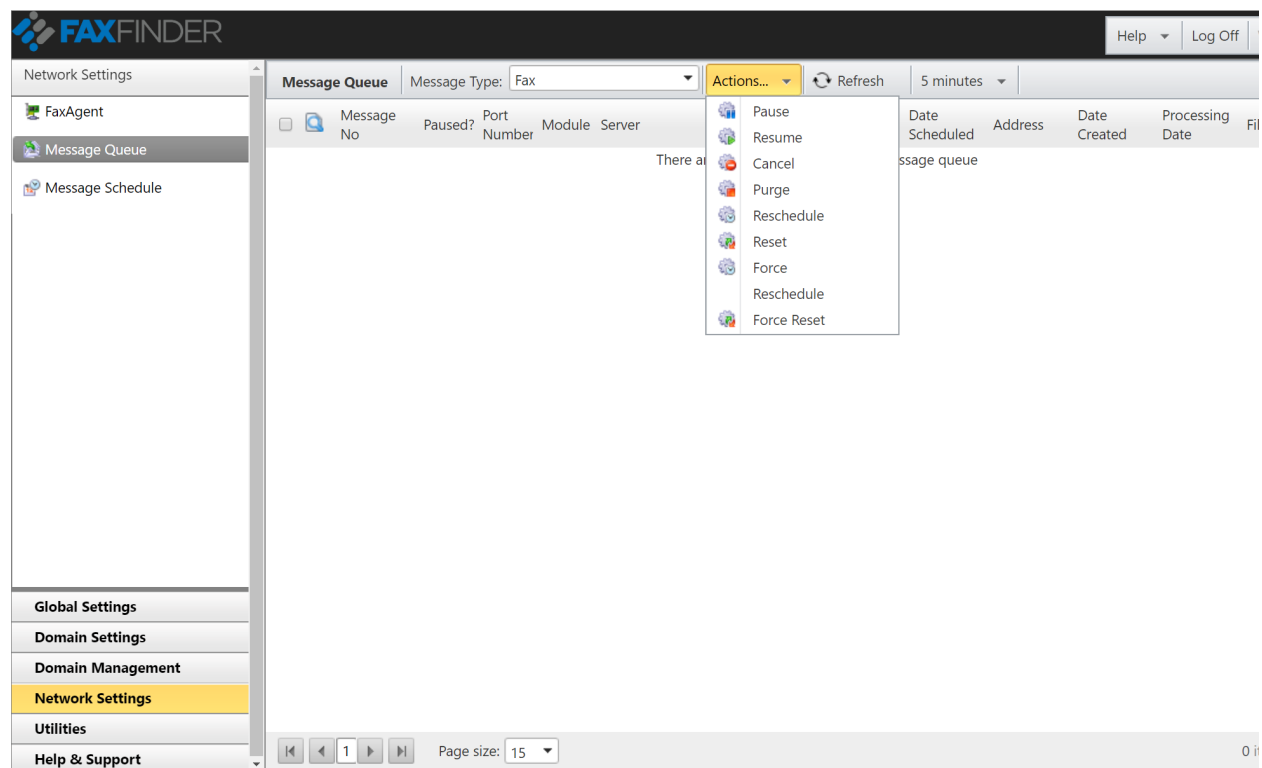
### Message Schedule

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

- Fax
- Email
- HTTP
- 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:



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

FaxFinder 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**

The screenshot shows the 'Purge Settings' utility window. At the top, there are buttons for 'Purge Settings', 'Save', and 'Apply All'. Below this is a 'Configure Domain' section with a 'SYSTEM' dropdown. The main 'Purge Settings' section contains the following fields:

- Purge Action:** A dropdown menu set to 'Purge All Data'.
- Start Purge At (am/pm):** A text field set to '12:00 AM' with a clock icon for scheduling.
- Purge data older than:** A text field set to '200' with up/down arrows for incrementing/decrementing.
- Enable?:** A dropdown menu set to 'Yes'.
- Purge External Download Option:** A dropdown menu set to 'Non-downloaded only'.
- Last Purge Date:** A field that is currently empty.

- Select the Domain to configure the Purge Settings for. If configuring for all, select System.
- Configure the field below:  
**Purge Action:**  
**Purge All Data** - This action will delete data from FaxFinder Database and image files from FaxFinder Document Store  
**Trim Messages** - This action will only delete transactional records from FaxFinder 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 FaxFinder. To enable purging, browse to the FaxFinder install directory and locate the file **DispatchAgent.exe.config** (example: C:\FaxFinder\DispatchAgent.exe.config). Open up the file with a text editor such as Notepad and locate the following line:  
`<add key="PurgeDebug" value="true"/>`
- Change the value from "true" to "false" to read:  
`<add key="PurgeDebug" value="false"/>`

6. Save and close the text editor and restart FXC3.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. FaxFinder checks on the Purge Settings in a 30 minutes interval.*

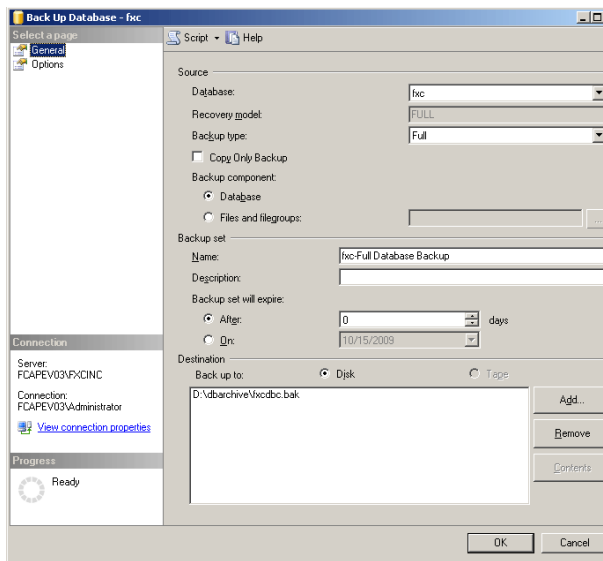
## Backup & Restoring FaxFinder SQL Database

### The Database Backup Guide

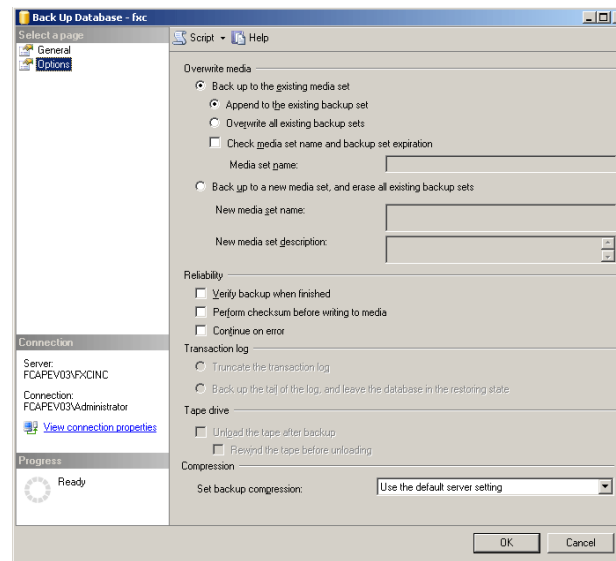
This chapter describes the various methods available to begin creating and managing backups of your FaxFinder SQL database.

#### *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 FaxFinder 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 FaxFinder 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



**Figure 1.0.0 - General Parameter Backup Window**



**Figure 2.0.0 - Options Parameter Backup Window**

**Note:** FaxFinder 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 FaxFinder 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 FaxFinder 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.

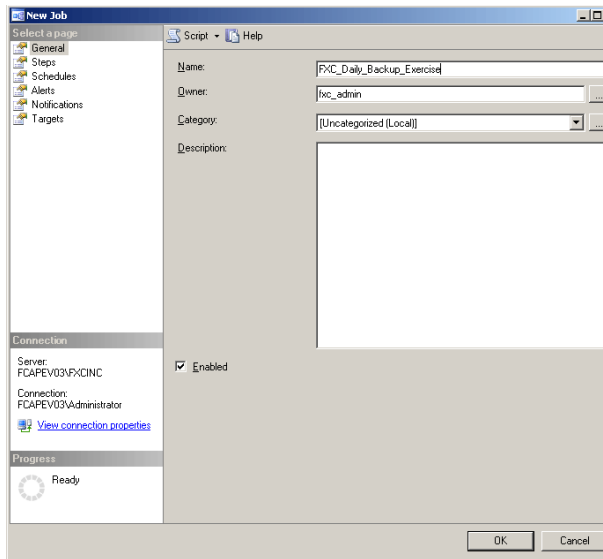


Figure 3.0.0 - Backup Job Window

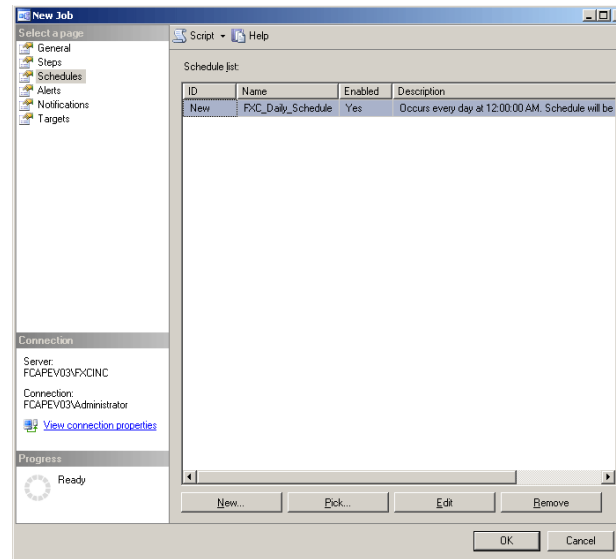


Figure 4.0.0 - Scheduling Job Window

### 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 FaxFinder database server.
2. Upon successfully authenticating yourself, expand the *Management* folder from within your object explorer panel to display the *Maintenance Plan* folder.
3. 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.

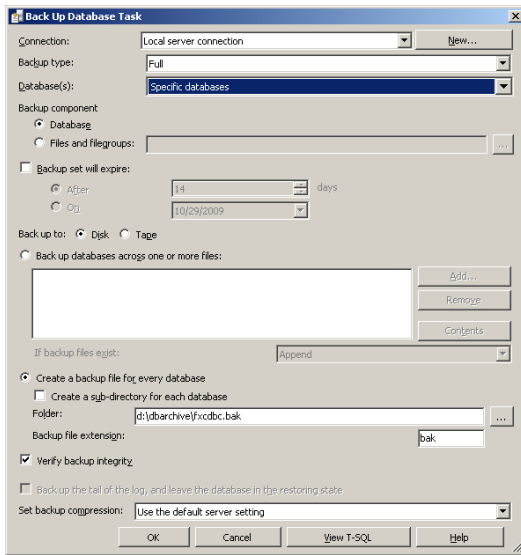


Figure 5.0.0 - Backup Job Window

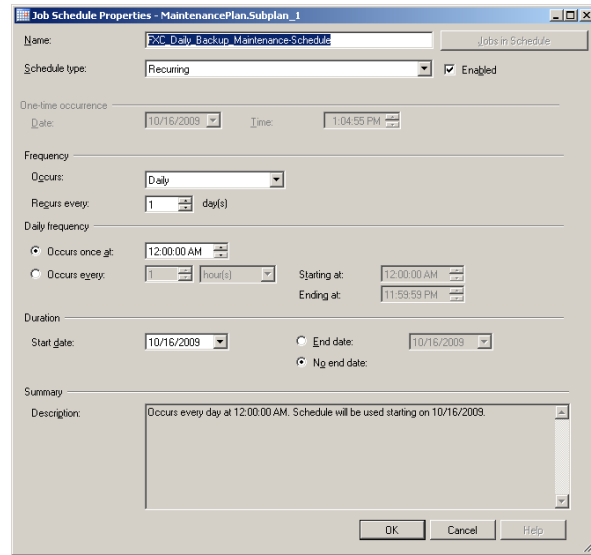


Figure 6.0.0 - Scheduling Job Window

### SQLCMD/OSQL Command Line Utility

1. From your FaxFinder 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

```
OSQL -S dbserver,port -U dbusername -P dbpassword
<Enter>
BACKUP DATABASE [fxc] TO DISK="C:
\FXCDBBAK\fxc.bak" <Enter>
GO <Enter>
EXIT <Enter>
```

#### SQLCMD Option

```
SQLCMD -S dbserver,port -U dbusername -P dbpassword
<Enter>
BACKUP DATABASE [fxc] TO DISK="C:\FXCDBBAK\fxc.bak"
<Enter>
GO <Enter>
EXIT <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 FaxFinder SQL database backups.

### *SQL Server Management Studio*

Note: Prior to attempting the following steps below, please contact FaxFinder Support to obtain the required FaxFinder 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 FaxFinder 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 FaxFinder database will present itself under the *Databases* folder from within your object explorer panel.

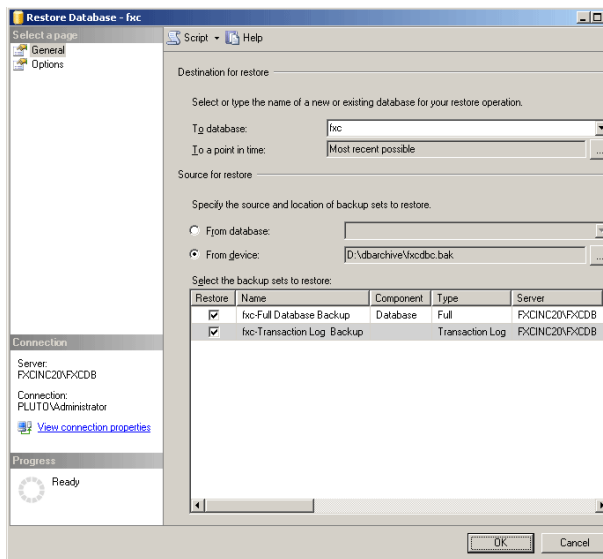


Figure 7.0.0 - Restore Database Window

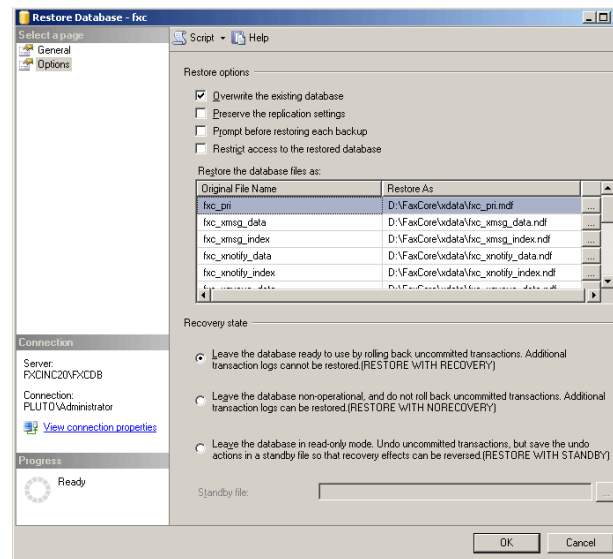


Figure 8.0.0 - Restore Options Window

6. Next, from within your object explorer panel, expand the restored FaxFinder 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 FaxFinder 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 FaxFinder 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 FaxFinder 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

1. From your FaxFinder 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

```
OSQL -S dbserver,port -U dbusername -P dbpassword <Enter>
RESTORE DATABASE [fxc] FROM DISK="C:\fxcdb.bak" <Enter>
GO <Enter>
EXIT <Enter>
```

#### SQLCMD Option

```
SQLCMD -S dbserver,port -U dbusername -P dbpassword <Enter>
RESTORE DATABASE [fxc] FROM DISK="C:\fxcdb.bak" <Enter>
GO <Enter>
EXIT <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 FaxFinder Document Stores

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

The screenshot displays the FaxFinder web interface. The top navigation bar includes the 'FAXFINDER' logo, a 'Help' dropdown, and a 'Log Off' button. The left sidebar shows the 'Global Settings' menu with options like 'Server Settings', 'Domain Permissions', 'Document Store' (selected), 'Email Integration', 'Inbound Routing', 'Outbound Routing', 'Printer Settings', and 'Black List Publication'. Below this, a secondary menu lists 'Global Settings', 'Domain Settings', 'Domain Management', 'Network Settings', 'Utilities', and 'Help & Support'. The main content area is titled 'Document Store' and features a table with the following columns: Name, Label, Address Root Path, Address Mask Path, and Description. The table lists several document stores, all of which are checked for selection. At the bottom of the page, there are navigation controls and a 'Page size: 15' dropdown.

Name	Label	Address Root Path	Address Mask Path	Description
DOCUMENTS	docs : owner	C:\ClusterStorage\Volume1\doc	uploadDoc	Document Directory - partitio
MESSAGES	messages : sent	C:\ClusterStorage\Volume1\doc	msg\OB	Outbound Message Directory
MESSAGES	messages : receive	C:\ClusterStorage\Volume1\doc	msg\IB	Inbound Message Directory -
RENDERING	render : xml file	C:\ClusterStorage\Volume1\doc	rendXMLFile	Rendering XML File Directory
MESSAGES	messages : attachment	C:\ClusterStorage\Volume1\doc	attachDoc	Outbound Message Attachme
MESSAGES	messages : temp render	C:\ClusterStorage\Volume1\doc	tempRendered	Temp Rendered File Directory

## 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
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

Configuration Tokens	
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 <b>(MULTI-VALUED)</b>
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.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 Tokens	
MESSAGE.OWNER_USERNAME	Message Owner UserName
MESSAGE.RECIPIENT_LIST	Message Recipient List <b>(MULTI-VALUED)</b>
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 <b>(MULTI-VALUED)</b>
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.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

<b>Message Tokens</b>	
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.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.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 2<sup>nd</sup> 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 dd-MM-yyyy yyyy/MM/dd yyyy/dd/MM MM/dd/yyyy dd/MM/yyyy	yyyy = Year MM = Month dd = Day
Time Format	hh:mm:ss tt hh:mm:ss t	hh = 12 hour

Format Info	Supported Syntax	Legends
	HH:mm:ss	HH = 24 hour mm = minute ss = second tt = AM/PM t = A/P

## Appendix E - Gateway Specifications

### Embedded Codes

Embedded codes works by embed FaxFinder 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 FaxFinder. 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 FaxFinder detects in the print stream or file. FaxFinder'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.**

**B****Billing Code**

Lets you enter a Billing code for the message

Example:

`^[BBillCode1234^]`

**C****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:

`^[D17208704141^]`

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

**E****Exclude Cover Page**

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

Example:

`^[ETrue^]`

**M****Cover Page Subject**

Lets you enter text into the Subject field of a cover page.

Example:

`^[MSubject Message^]`

**N****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.^]`

**K****Tracking key.**

Lets you enter a tracking key to the fax for indexing/search.

Example:

`^[KMessageTracking^]`

**O**

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 FaxFinder 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:

	<code>^[Oecuser^]</code>
<b>P</b>	<p>Message Priority</p> <p>Lets you define the priority of the message being sent (1-100)</p> <p><code>^[P100^]</code></p>
<b>S</b>	<p>Sender's name (used as a "fax from" designation).</p> <p>Lets you enter text in the From field of a cover page.</p> <p>Example:</p> <p><code>^[SJohn Jones^]</code></p>
<b>T</b>	<p>Scheduled date and time.</p> <p>Lets you schedule a fax to be sent at a later time.</p> <p>Example:</p> <p><code>^[T01/01/98 2:00p^]</code></p>
<b>Y</b>	<p>Include default cover page</p> <p>Lets you specify whether to include the originator/user's (specified with O) default cover page (<b>True</b> or <b>False</b>)</p> <p>Example:</p> <p><code>^[YTrue^]</code></p>
<b>Z</b>	<p>Cover page name</p> <p>Lets you specify a specific cover page to use with the message</p> <p>Example:</p> <p><code>^[ZDefault Cover Page^]</code></p>

**Example of an Embedded Code Sequence:**

```
^[D 17208704141^[M Purchase Order 110011^[N John Jones^[C This is a test fax!^[O
lsmith^[SLinda Smith^[T 05/21/05 1:00p^]
```

FaxFinder interprets this sequence as follows:

The document will be delivered by fax to: +1 (720) 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 FaxFinder. Control file has to be in text based format. Binary control file is not supported.

The FaxFinder 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 FaxFinder stored cover page (case sensitive) to use for the fax.	String	no
userName	The FaxFinder username with which to send the message. The profile set up for the FaxFinder user will be used in the general processing of the fax.	String	Yes if a defaultUserName is not specified in the profile.
nocover	Indicates to not use any cover page, even if specified by the FaxFinder 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:FaxFinder

recipientAddress:18665551111

recipientName:Jim Smith

recipientCompany:FaxFinder

recipientAddress:18665552222

recipientAddress:18665553333

recipientAddress:18665554444

## HP Digital Sender

This gateway works in the same concept as control file but the files are coming from HPDS. This gateway supports HPDS codes and processes it before pushing to FaxFinder.

## 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.

## FujiXerox XST

This gateway support file drop from FujiXerox MFPs. XST file is job template configuration set at MFP and perform scan and drop image + XST file to a network folder or FTP. For more info on the job template configuration please refer to FujiXerox MFP integration document.

## Oracle

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

## Xerox DOC XST

This gateway support file drop from Xerox MFP only. This is different from FujiXerox implementation due to Xerox MFP drop a folder containing files instead of just XST file and images. There is a build in relay processor in this gateway to digest the DOC.XSM folder and extract the content and push it to FaxFinder.

## 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.

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <configSections>
    <sectionGroup name="Gateways">
      <section name="TYPE" type="System.Configuration.NameValueSectionHandler"/>
      <section name="controlFile" type="System.Configuration.NameValueSectionHandler"/>
      <section name="embeddedCodes" type="System.Configuration.NameValueSectionHandler"/>
      <section name="embeddedCodesPcl" type="System.Configuration.NameValueSectionHandler"/>
      <section name="embeddedCodesPDF" type="System.Configuration.NameValueSectionHandler"/>
      <section name="hpDigitalSender" type="System.Configuration.NameValueSectionHandler"/>
      <section name="SAP" type="System.Configuration.NameValueSectionHandler"/>
      <section name="FujiXeroxXST" type="System.Configuration.NameValueSectionHandler"/>
      <section name="Oracle" type="System.Configuration.NameValueSectionHandler"/>
      <section name="Xerox" type="System.Configuration.NameValueSectionHandler"/>
    </sectionGroup>
    <sectionGroup name="Customs">
      <section name="Xerox1" type="System.Configuration.NameValueSectionHandler"/>
      <section name="Xerox2" type="System.Configuration.NameValueSectionHandler"/>
      <section name="Xerox3" type="System.Configuration.NameValueSectionHandler"/>
    </sectionGroup>
    <section name="log4net" type="log4net.Config.Log4NetConfigurationSectionHandler, log4net"/>
    <sectionGroup name="applicationSettings" type="System.Configuration.ApplicationSettingsGroup,
System, Version=2.0.0.0, Culture=neutral, PublicKeyToken=b77a5c561934e089" >
      <section name="GatewayAgent.Properties.Settings"
type="System.Configuration.ClientSettingsSection, System, Version=2.0.0.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" requirePermission="false" />
    </sectionGroup>
  </configSections>
  <log4net>
    <appender name="RollingLogFileAppender" 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 - (%file:%line) - %m%n" />
      </layout>
    </appender>
  </log4net>
  <root>
    <level value="ALL" />
  </root>
</configuration>
```

```

    <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 key="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 key="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"/>
  </Xerox3>
</Customs>

```

```

    <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 key="attemptIntervalSec" value="30" />
  </Xerox3>
</Customs>
<Gateways>
  <TYPE>
    <add key="controlFile" value="1" />
    <add key="embeddedCodes" value="1" />
    <add key="embeddedCodesPcl" value="1" />
    <add key="embeddedCodesPDF" value="1" />
    <add key="hpDigitalSender" value="0" />
    <add key="SAP" value="1" />
    <add key="FujiXeroxXST" value="1" />
    <add key="Oracle" value="1" />
    <add key="Xerox" value="1" />
  </TYPE>
  <controlFile>
    <add key="baseDirectory" value="xgateway\controlfile" />
    <add key="inboxDirectory" value="xgateway\controlfile\inbox" />
    <add key="processFileMask" value="*.ctl" />
    <add key="allowAnonymousUsers" value="1" />
    <add key="defaultUsername" value="em-codes" />
    <add key="userNamePrefix" value="" />
    <add key="inputFileType" value="PDF" />
    <add key="faxAsRaw" value="0" />
    <add key="includeSenderNotification" value="0" />
    <add key="includeSenderCoverPage" value="0" />
    <add key="maxAttempts" value="2" />
    <add key="attemptIntervalSec" value="30" />
  </controlFile>
  <embeddedCodes>
    <add key="baseDirectory" value="xgateway\embeddedcodes" />
    <add key="inboxDirectory" value="xgateway\embeddedcodes\inbox" />
    <add key="processFileMask" value="*.*)" />
    <add key="isInputFileBinary" value="0" />
    <add key="binaryDataStartIndex" value="" />
    <add key="allowAnonymousUsers" value="1" />
    <add key="defaultUsername" value="em-codes" />
    <add key="userNamePrefix" value="" />
    <add key="inputFileType" value="" />
    <add key="faxAsRaw" value="0" />
    <add key="includeSenderNotification" value="0" />
    <add key="includeSenderCoverPage" value="0" />
    <add key="maxAttempts" value="2" />
    <add key="attemptIntervalSec" value="30" />
    <add key="preserveCodesInOutput" value="0" />
  </embeddedCodes>
  <embeddedCodesPcl>
    <add key="baseDirectory" value="xgateway\embeddedcodesPcl" />

```

```

<add key="inboxDirectory" value="xgateway\embeddedcodesPcl\inbox"/>
<add key="processFileMask" value="*.pcl"/>
<add key="isInputFileBinary" value="0"/>
<add key="binaryDataStartIndex" value=""/>
<add key="allowAnonymousUsers" value="1"/>
<add key="defaultUsername" value="em-codes"/>
<add key="userNamePrefix" value=""/>
<add key="inputFileType" value="PCL"/>
<add key="faxAsRaw" value="0"/>
<add key="includeSenderNotification" value="0"/>
<add key="includeSenderCoverPage" value="0"/>
<add key="maxAttempts" value="2"/>
<add key="attemptIntervalSec" value="30"/>
<add key="preserveCodesInOutput" value="0"/>
</embeddedCodesPcl>
<embeddedCodesPDF>
<add key="baseDirectory" value="xgateway\embeddedcodesPDF"/>
<add key="inboxDirectory" value="xgateway\embeddedcodesPDF\inbox"/>
<add key="processFileMask" value="*.pdf"/>
<add key="isInputFileBinary" value="1"/>
<add key="binaryDataStartIndex" value="%PDF"/>
<add key="allowAnonymousUsers" value="1"/>
<add key="defaultUsername" value="em-codes"/>
<add key="userNamePrefix" value=""/>
<add key="inputFileType" value="PDF"/>
<add key="faxAsRaw" value="0"/>
<add key="includeSenderNotification" value="0"/>
<add key="includeSenderCoverPage" value="0"/>
<add key="maxAttempts" value="2"/>
<add key="attemptIntervalSec" value="30"/>
<add key="preserveCodesInOutput" value="1"/>
</embeddedCodesPDF>
<hpDigitalSender>
<add key="baseDirectory" value="xgateway\HPDS"/>
<add key="inboxDirectory" value="xgateway\HPDS\inbox"/>
<add key="associatedFilesDir" value="xgateway\HPDS"/>
<add key="associatedFilesMask" value="#BASE_FILE_NAME#.TIF"/>
<add key="processFileMask" value="*.hpf"/>
<add key="allowAnonymousUsers" value="1"/>
<add key="defaultUsername" value="Admin"/>
<add key="userNamePrefix" value="HP_SCANNER-"/>
<add key="faxAsRaw" value="0"/>
<add key="inputFileType" value=""/>
<add key="includeSenderNotification" value="0"/>
<add key="includeSenderCoverPage" value="0"/>
<add key="maxAttempts" value="2"/>
<add key="attemptIntervalSec" value="30"/>
</hpDigitalSender>
<SAP>
<add key="baseDirectory" value="xgateway\SAP"/>
<add key="inboxDirectory" value="xgateway\SAP\inbox"/>
<add key="inboxImagesDirectory" value="xgateway\SAP\inbox\images"/>
<add key="defaultUsername" value="Admin"/>
<add key="allowAnonymousUsers" value="1"/>
<add key="processFileMask" value="*.app"/>

```

```

<!--<add key="inputFileType" value="PCL"/>-->
<add key="faxAsRaw" value="0"/>
<add key="includeSenderNotification" value="0"/>
<add key="includeSenderCoverPage" value="0"/>
<add key="maxAttempts" value="2"/>
<add key="attemptIntervalSec" value="30"/>
</SAP>
<FujiXeroxXST>
  <add key="baseDirectory" value="xgateway\xst"/>
  <add key="inboxDirectory" value="xgateway\xst\inbox"/>
  <add key="defaultUsername" value="Admin"/>
  <add key="allowAnonymousUsers" value="1"/>
  <add key="processFileMask" value="*.xst"/>
  <add key="inputFileType" value="PDF"/>
  <add key="faxAsRaw" value="0"/>
  <add key="includeSenderNotification" value="0"/>
  <add key="includeSenderCoverPage" value="0"/>
  <add key="maxAttempts" value="2"/>
  <add key="attemptIntervalSec" value="30"/>
</FujiXeroxXST>
<Oracle>
  <add key="baseDirectory" value="xgateway\oracle"/>
  <add key="inboxDirectory" value="xgateway\oracle\inbox"/>
  <add key="defaultUsername" value="Admin"/>
  <add key="userNamePrefix" value=""/>
  <add key="allowAnonymousUsers" value="1"/>
  <add key="processFileMask" value="*.txt"/>
  <add key="inputFileType" value="PDF"/>
  <add key="faxAsRaw" value="1"/>
  <add key="includeSenderNotification" value="0"/>
  <add key="includeSenderCoverPage" value="0"/>
  <add key="maxAttempts" value="2"/>
  <add key="attemptIntervalSec" value="30"/>
</Oracle>
<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 key="attemptIntervalSec" value="30"/>
</Xerox>
</Gateways>
<applicationSettings>

```



```

<GatewayAgent.Properties.Settings>
  <setting name="GatewayAgent_FXWS_wfDispatcher" serializeAs="String">
    <value>http://localhost:2372/WebServices/wfDispatcher.asmx</value>
  </setting>
</GatewayAgent.Properties.Settings>
</applicationSettings>
</configuration>

```

To setup custom gateway, please refer to [sectionGroup](#) 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 “[Customs](#)” 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 [additional name and value pair added](#) `<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.