FaxFinder® Fax Servers

Models: FF130

FF230

FF430

FF830

Client User Guide



FaxFinder[®] Client User Guide Fax Client Software for FaxFinder Series

PN S000460B, Version B

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Revisions

Level	Date	Description
Α	10/28/08	Initial release.
В	06/11/09	Restructured for ease of use; new client (2.01).

Patents

This device covered by the following patent: 5,673,268

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Client Software Installation

The Client software is for general use of the FaxFinder, but it needs to be associated with a FaxFinder unit for proper operation. Your administrator should provide the software or a location where it can be obtained from. You will need to install the Client software on your PC and set the FaxFinder that it is to work with.

Installation

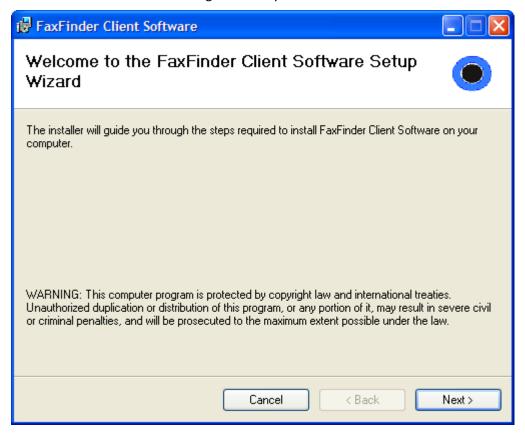
A. Insert the FaxFinder Product CD into the CD-ROM drive of the client PC. If the CD does not auto start, use Windows Explorer to navigate to your CD drive and launch the installation program by double-clicking on **cd_start.exe** file on the CD. From the menu presented, click the Software button.

From the new screen presented, select the Client Software button to install the Multi-Tech FaxFinder Client software for using the FaxFinder unit.

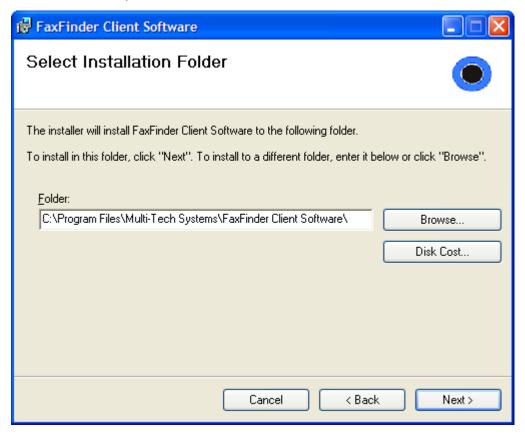
- or -

Retrieve the software installer from the location provided by your administrator. Double-click the filename (default is *FFClientInstall.msi*) to begin the installation. The file labeled *FFClientTSinstall* is for Windows Terminal Services only.

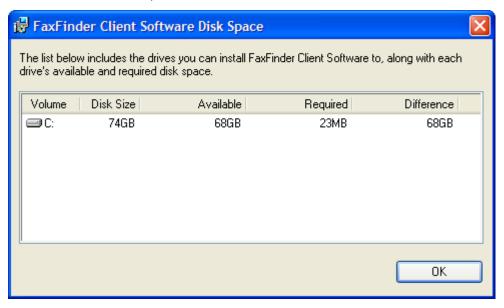
Important: If you have any old versions of the FaxFinder client software installed (for any FaxFinder model family), please uninstall that prior to installing the new version. The FaxFinder client utilizes Windows Add or Remove Programs utility in the Control Panel.



B. At the Welcome screen, click Next.



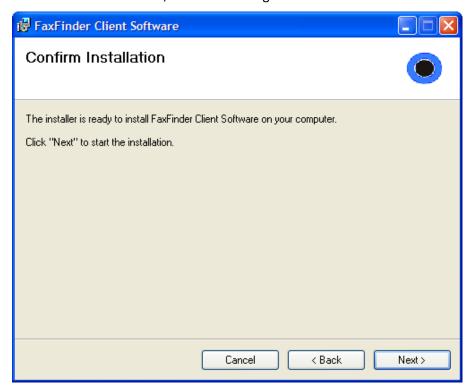
C. At the **Select Installation Folder** screen, browse to the desired file location for the FaxFinder client software. In most cases, the default file location is recommended.



Clicking on the **Disk Cost** button will show you the size of the software being installed as well as the available disk space of the target drive.

When the destination location is correct, click **Next**.

D. At the **Confirm Installation** screen, click **Next** to begin the installation.



A transient screen ("Installing FaxFinder Client Software") will appear while files are being copied.



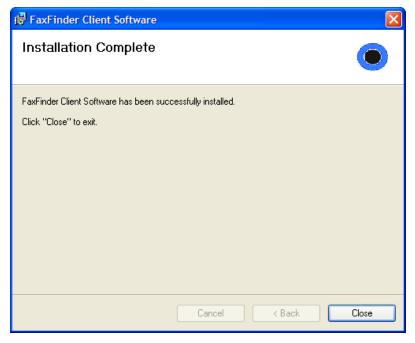
E. The FaxFinder Client software can place a shortcut in the Startup directory so that the client software will start automatically when the PC is booted.



F. You will be asked if you want the Client software to automatically launch when the installation is complete. Select your preference.



- G. You will be asked whether or not you want to associate .tif and .cpg files with the Multi-Tech Tiff Viewer. Click **Yes** (unless you prefer to use a different viewer program). The .cpg files become associated with the Cover Page software.
 - If a Question screen appears asking "Warning the extension .tif is already registered, Overwrite?"; click **Yes** if you wish to use the TIFF viewer installed with the FaxFinder Client Software. Click **No** if you prefer to leave the current association for viewing .tif files.
- H. Then the **Installation Complete** screen will appear.



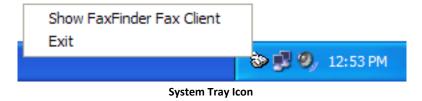
Click the Close button.

If you chose 'Yes' above to have the client software start after installation, you will see the application icon down in your System Tray. Click on the icon and select "show FaxFinder Client software" to use the program.

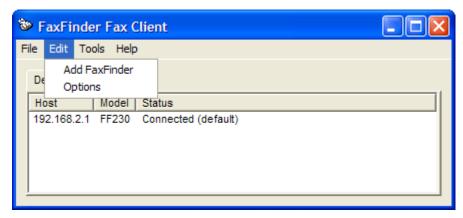
Associating Client Software and User with a FaxFinder Unit

After the FaxFinder client software is installed, you must associate it with one or more FaxFinder units. Sometimes more than one FaxFinder unit is available for use. In some cases, certain client users might be assigned to some FaxFinder units and not assigned to others. This procedure shows you how to make this association so that faxes may be sent from a particular FaxFinder unit to the email inbox of your PC. To do this procedure, you will need to know the IP address of the FaxFinder unit that you are able to use. You should also be given a valid username and password for every unit that you can use. Be aware that an individual FaxFinder client user can be associated with more than one FaxFinder unit. This could easily be the case in an office that is large and/or an office that has a great deal of fax traffic.

The icon for the FaxFinder Client software application will appear in the Windows Start menu programs selection. After installation, the Client Software starts up whenever the computer is booted if the 'Yes' option was chosen when the 'Do you wish to start the FaxFinder Client automatically?' prompt appeared during installation. When running, a FaxFinder icon appears in the system tray area at the lower-right corner of the screen. The FaxFinder Fax Client Software screen can be opened from either the Start menu icon or the tray icon. If the Client Software is shut down, it can be re-opened from the Start menu or by double-clicking on a file named FaxFinderClient.exe (or something very similar), which, following a typical, default installation, is located at C:\Program Files\Multi-Tech Systems\FaxFinder Client Software\FaxFinder Client.exe. When the client software is launched, it will reside in the System Tray be default.



1. At the main screen of the **FaxFinder Fax Client Software**, click on **Edit** and select "Add FaxFinder" if you know the IP address or Host Name of the FaxFinder, otherwise open the **Tools** menu and select "Auto-Discover Devices" to have the Client software search the network for FaxFinder units.



Add FaxFinder Manually



Use Auto Discover to Locate FaxFinder

a. If you are using the Auto Discover Device method, click the 'Search' button to have the FaxFinder Client software search the available network for FaxFinder units that are available.

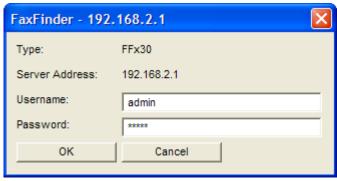


2. To add a FaxFinder when the IP address is known, select the FaxFinder model family from the Type drop-down, enter the IP address "Server Address" field along with your Username and Password.



If the **Auto Discover Devices** feature was used, you may Right-click or double Left-click on the IP address or name of the FaxFinder unit that was detected and select **Add**. Use the 'X' in the upper right hand corner to close the Auto Discover window after you have added it to the client.

3. Enter, in the appropriate fields, the Username and Password that the client will use when accessing this FaxFinder unit. If the client is to be associated with multiple FaxFinder units, a different Username and Password could be established for each. However, in most cases, it is advisable (for the sake of simplicity and convenience) to use the same Username and Password for all FaxFinder units.



NOTE: The Username entered here must match the entry used in the "Username" field of the **Users** screen in the FaxFinder Server Software. The password entered here must match the password entered for this client.

The Username and Password are case-sensitive.

Click OK.

4. A new FaxFinder entry should appear on the "Device Status" tab of the **FaxFinder Fax Client Software** screen.



The status of the newly registered FaxFinder unit may momentarily go from "Not logged in" to "Logging in" to "Connected."

If it goes to Login Failure, then one of two things is wrong:

- a. The IP address or domain name is wrong. If that is the case, delete that entry (by right-clicking **DELETE**), and enter a new one;
 - or -
- b. The Username/Password combination may be wrong. Verify that the client Username/Password combination (accessible by right-clicking and selecting **Properties** on the FaxFinder listed in the Device Status tab of the client software) matches the **Username/Password** combination assigned to the client-user by the FaxFinder Administrator.

Note: Username and Password are case-sensitive.

Disassociating the Client from a Specific FaxFinder Unit

In this procedure, you will un-do the procedure "Associating Client with a Specific FaxFinder Unit." This situation might occur when changes are being made in the network faxing system. In any event, this procedure severs the tie between your PC and a specific FaxFinder unit so that you will no longer be connected to it for sending fax messages. (Faxes can be received in email form from the FaxFinder server, despite disassociating from the FaxFinder server, as long as the receiving party is entered in the FaxFinder Phone Book.) In cases where the client is currently associated with more than one FaxFinder unit, you will need to know the IP address of the specific FaxFinder unit from which you want to disconnect.

- 1. Open the FaxFinder Client Software program and go to the Device Status tab. Select the FaxFinder unit from which you want to disconnect (you can identify the FaxFinder unit by its IP address or domain name), Right-click on it and select **delete**.
- 2. Your FaxFinder Client Software will no longer be able to send faxes through this particular FaxFinder unit.

FaxFinder Operation

Introduction

This chapter describes the things that a user can do with the FaxFinder system. The software programs involved are the FaxFinder Client Software and the Multi-Tech Tiff Viewer (or designated PDF viewer). The FaxFinder Client Software interfaces with the FaxFinder Server and has its own user interface. When previewing outgoing faxes, the PC's operating system calls up the designated TIFF viewer to display the outgoing fax. When viewing received faxes, the PC's operating system calls up the appropriate viewer (PDF or TIFF). The choice of file types (PDF or TIFF) is made in the FaxFinder Server software. Note that client users can choose to display either on the Multi-Tech TIFF viewer or on a different (non-Multi-Tech) TIFF viewing program. Likewise, if the FaxFinder system distributes incoming faxes as PDF files, the client can designate which PDF viewer to use. The Multi-Tech TIFF viewer is installed automatically with the FaxFinder Client software.

Overview:

Sending Faxes

- ➤ The FaxFinder Schedule Fax Screen (New Fax)
- Send Fax with Client Software
- Send Fax by Printing
- Send Fax from Email (T.37)
- Send Fax from FaxFinder Web Interface
- > Send Fax by Web API

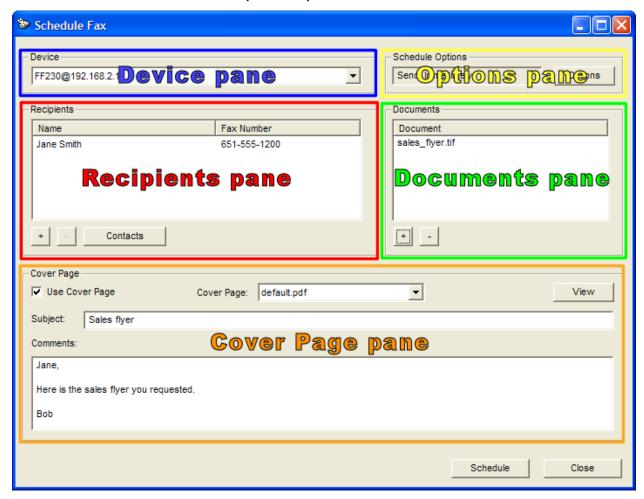
Using the Client Software

- Details of Software Commands
 - Add a contact
- Using the Cover Page Generator
- Using the Tiff Viewer

Sending Faxes

Sending faxes through the FaxFinder is quick and simple and offers a variety of methods that can be used to accomplish this. This section will show all the possible ways to send a fax with the FaxFinder. Depending on how your administrator has set up the unit, several or even all options may be available. First, the FaxFinder Schedule Fax window will be explained as it is used for the majority of faxing through the FaxFinder unit.

The FaxFinder Schedule Fax Screen (New Fax)



The **FaxFinder Schedule Fax** screen appears (a) when you double-click an item from the Print Capture tab of the client, or (b) when you select the **New Fax** command from the File menu of the Client Software screen or (c) when you Right-click an item in the Print Capture tab and select 'Fax.'

There are four sections (called 'panes' hereafter) to the Fax Scheduler: the Recipients pane, the Documents pane, the Options pane and the Cover Page pane. At the bottom are the two main function buttons – one to send or schedule the fax and the other to cancel it entirely.

Device pane

The device pane provides a drop-down list of all FaxFinder units available to this client. Select the unit that you want this fax sent from.

Schedule Options pane



Options text box: This text box will display 'Send Immediately' by default. If you want to schedule this fax to be sent at a specific time or date, then you must click the Options button.

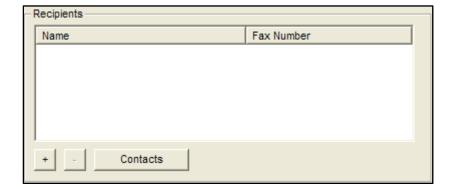
<u>Options (button):</u> If you want to specify a time or date for the fax to be sent, you must click the Options button which will open the Fax Scheduling Options window. The Options button will also allow you to change the Maximum Attempts, Priority and Fax Receipt options from the default values.

Fax Scheduling Options



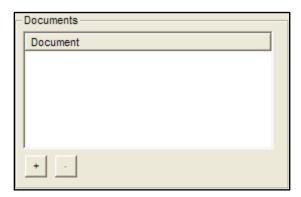
By un-checking the 'Send Immediately' box, you can set a specific time and date for this fax to be sent. You may change the Maximum Attempts, Priority and Fax Receipt settings for this fax.

Recipients pane



- <u>Name (column):</u> Party to whom the fax will be sent. You cannot type in this window. When a recipient is specified either from the **Contacts** or from the **Enter a Fax Recipient** window, that recipient's name will appear in this field.
- <u>Fax Number (column):</u> Fax number to which the fax will be sent. You cannot type in this window. When a fax number is specified either from the **Contacts** or from the **Enter a Fax Recipient** window; that fax number will appear in this field.
- <u>+ (button):</u> Brings up the **Enter a Fax Recipient** window. At this window, you enter the name and fax number of the party to whom the fax will be sent.
- (button): Removes a selected (left-click to select) entry from the Recipients list. You will be prompted (by the FaxFinder Delete? screen) to confirm removal of the recipient from the list of recipients.
- <u>Contacts (button):</u> Brings up the **Select Contacts** screen from which a fax recipient can be chosen (this is retrieved from the user contacts stored in your user ID on the FaxFinder unit). If enabled on the FaxFinder server, this will also display contacts from Microsoft Outlook. Multiple entries can be selected by holding the *Ctrl* key (individually) or *Shift* key (all entries between) while clicking.

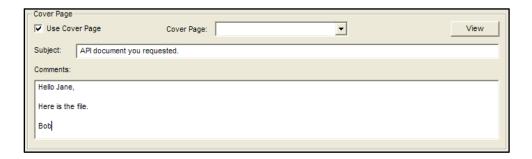
Documents pane



<u>Document</u> (column): File name and type extension of document(s) to be transmitted as a fax.

- + (button): Click this button to add another document to the fax transmission. Only .tif, .pdf and .txt files can be added with this.
- <u>— (button):</u> Click this button to remove a document from the list of items to be faxed. You will be prompted (by the **FaxFinder Delete?** screen) to confirm removal.

Cover Page pane



Use Cover Page (check box): Check this checkbox to include a cover page with your fax.

<u>Cover Page (drop-down selection box):</u> This field will be active when the 'Use Cover Page' check box is ticked. By clicking on the down arrow, you will see the selection of cover pages available from the FaxFinder unit. Click to highlight and select the cover page you want to use.

View (button): Brings up the cover page to be used.

<u>Subject (text field):</u> Here you can type a brief description of the contents of the fax. The placement of this "Subject" description will depend on the cover page style that you use.

<u>Comments (text field):</u> Here you can type a lengthy comment about the fax or related topics.

Send the Fax



<u>Schedule (button):</u> When you have completed the other sections, click the Schedule button to have the fax sent according to the time set by the Options parameters.

<u>Close (button)</u>: To exit the Fax Schedule window and discard all changes, click the close button.

Send Fax with Client Software

When a document (.tif, .pdf, or .txt) is complete and ready to be sent as a fax, opening the client software and using the Schedule Fax option is quick and easy.

To begin, either double-click the FaxFinder Client Software icon in the System Tray or launch it manually from the program listing on the Start menu, which will place it down in the System Tray.



- 1. Right-click on the FaxFinder unit that you want to send the fax from and select 'New Fax'
- 2. The Fax Scheduler screen will open
- 3. Enter recipients manually by clicking the '+' button or select from an already available contact
- 4. Click on the '+' button to the right of the Documents window and browse to the file you want sent (you may add more files by repeating this step)
- Highlight and click Open to use the selected file
 Note: If you do not see the file you want to use, make sure that the type of your source file
 (PDF, Text, Postscript, Tiff) is valid
- 6. Set any Options that you need (priority, time to send, etc.)
- 7. Select and modify a cover page as needed
- 8. Enter a subject and/or comments if needed
- 9. Click the Schedule button in the lower left corner to send the fax according to the options set

Send Fax by Printing

The easiest and most convenient way to utilize the FaxFinder once the client software is installed on a computer is to take advantage of the Print function of a software program.

To begin, create the text that you want to send out as a fax and save your work.

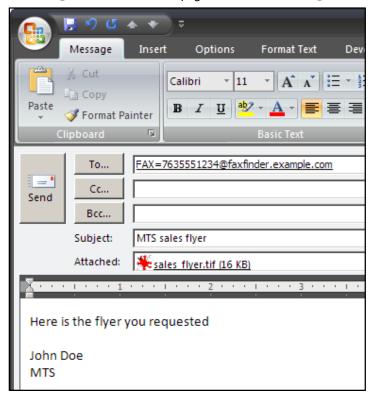
- 1. Select the Print option from the software you are using
- 2. Select the FaxFinder as your print destination and click on the Print button
- 3. The Schedule Fax window opens
- 4. Enter recipients manually by using the '+' button or select from an already available contact list
- 5. Set any Options that you need (priority, time to send, etc.)
- 6. Select and modify a cover page as needed
- 7. Enter a subject and/or comments if needed
- 8. Click the Schedule button in the lower left corner to send the fax according to the options set

Send Fax from Email (T.37)

When you wish to send an email as a fax, using the T.37 format in the **To:** field will take advantage of the FaxFinder from your Outlook email software. To do this you will need to know a few things: your administrator should provide you with the domain name of the FaxFinder unit and you need to know the phone number of the fax recipient.

To begin, compose the message as a new email.

1. In the **To:** field, enter the recipients in this format: **FAX=***phone number of recipient fax machine@FaxFinder domain* (e.g. FAX=7635551234@faxfinder.example.com as shown below)



- Add any graphical attachments (PDF, Text or Tiff)
- 3. Click the Send email button

Send Fax from FaxFinder Web Interface

Logging in to the FaxFinder unit via a web browser is another simple way to have a fax sent from the FaxFinder unit. This process is started by simply entering the IP address (e.g. 192.168.2.1) in the address bar of the browser and using the links to access the Send Fax screen. Depending on the browser used, you may see security warnings. Click 'Yes' to proceed in Internet Explorer; for Firefox, you may have to add an exception for the FaxFinder unit's IP address.

To begin, enter your Username and Password.

- 1. Click on the top navigation link "Send Fax"
- 2. The Sender Information will be pre-entered with your user info
- 3. Enter the recipient information or select from an available contact list and click 'Add Recipient'
- 4. Select and fill out any information to be included as a cover page if you are using one
- 5. Browse to the file that is the fax information (you can add more with the 'Add Another Attachment' button)
- 6. Choose any option variables for this fax
- 7. Click the Send Fax button at the bottom left of the screen

Send Fax by Web API

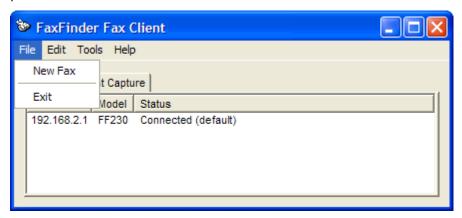
If your administrator has created a custom API (Application Programming Interface) for you to use, that is another option available for sending faxes through the FaxFinder. This will be unique for your company, so you should look for information from your Administrator or IT department.

Using the Client Software

This section will detail all of the commands, tabs and screens that the Client Software offers. While not every user will need all of the options available, you may want to glance through what is here for something that will prove useful to you. The Schedule Fax command is the primary means of sending a fax through the software and populating the address book can save time by having those contacts readily available when a fax needs to be sent.

File Menu Command Descriptions

The following options are available from the **File** menu.



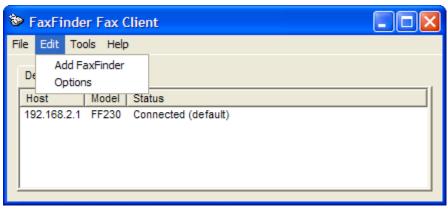
File menu Commands

New Fax: Clicking this command will bring up the 'Schedule Fax' window of the default FaxFinder unit, where a user can enter the needed information and schedule a fax to be sent by the active FaxFinder unit.

Exit: This will exit the FaxFinder Client software. You will be prompted with a pop-up verifying that you actually want to exit the software. Another option is to click on the window minimize button to return the FaxFinder client to the system tray.

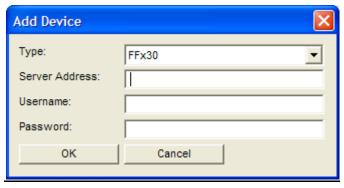
Edit Menu Command Descriptions

The following options are available from the **Edit** menu.



Add FaxFinder

The following will detail the sections available from the **Edit | Add FaxFinder** menu.



Type: Select the FaxFinder series you are connecting to.

FFx30 for the FF130, FF230, FF430 and FF830 *FFx20* for the FF120, FF220, FF420 and FF820

Server Address: Enter the IP address of the FaxFinder unit that you want to add.

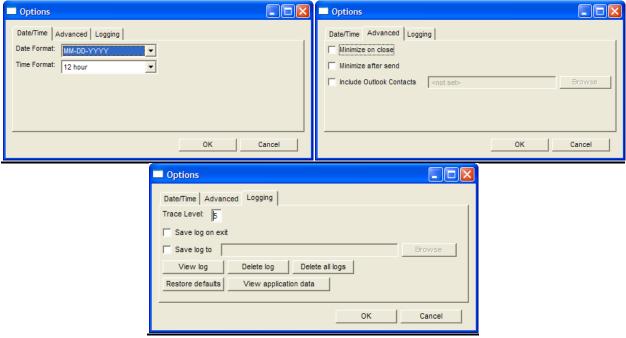
Username: Enter the user name you have been assigned for this unit.

Password: Enter the password associated with the user name you have been assigned for this unit.

Click **OK** to add the new FaxFinder unit to the client software.

Options

The following is available from the **Edit | Options** menu.



Date/Time tab:

Here you enter the date and time formats for the fax header.

Advanced tab:

Here you designate the circumstances that will make the Send Fax window become minimized and allow the enabling of the importation of a Microsoft Outlook address book. Include Outlook contacts will automatically find your Outlook (2000 version and newer) folder and import the contacts that exist there.

Logging tab:

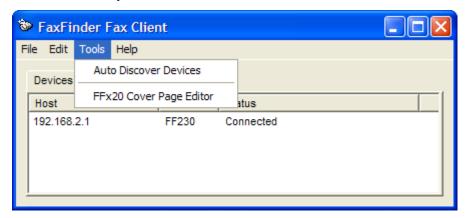
A **Trace Level** of 9 is the highest trace setting. A Trace Level of 1 is the lowest (least amount of trace) setting.

Select **Save Log on Exit** to ensure the Log file exists after the application is closed.

Select **Save Log to** if you want to create a log file other than the default. You may **Browse** to an existing File Folder and type in the name of the custom log file in the edit field.

- Click View Log to view the existing log file.
- Click Delete Log to erase the current log.
- Click **Delete All Logs** to remove any previously existing Log Files.
- Click **Restore Defaults** to restore the Logging information to factory defaults.
- Click View Application Data to start an explorer window to find and view existing log files.
- Click **OK** to save your changes.
- Click Cancel to Cancel any changes made.

Tools Menu Command Descriptions



Auto Discover Devices: Selecting Auto Discover Devices will have the Client software search the network for active FaxFinder units that are on the same network.

Click on the **Search** button to begin the auto discovery. Once begun, you can click the **Stop** button to end the search at any time. When you are finished, click the **Close** button.

Any device found can be added by right-clicking and selecting *Add* or double-clicked to add it to the Client software.



FFx20 Cover Page Edit: Selecting this option will open the FaxFinder x20 Cover Page Editing software that was installed with the client. The software allows you to edit existing covers pages or create entirely new ones for the <u>FaxFinder x20 models only</u>.

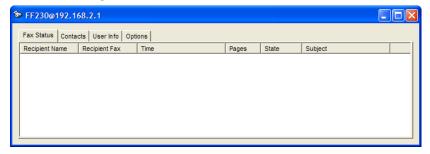
Device Tab (Main Window)

The Devices tab will show all of the FaxFinder units that are associated with the client software. This window has three columns: *Host* (the name or IP address of a FaxFinder unit), *Model* (the model number of the FaxFinder unit) and *Status* (displays the connection state of the FaxFinder unit as well as showing which unit is set as the default unit for use). By **right-clicking** on the name or IP address of the FaxFinder unit in the *Host* column, you will get an option window.



Open

Selecting Open (or double-clicking the FaxFinder host) will launch the FaxFinder summary window.



Fax Status tab

This tab will show the name, number, time, pages, state and subject for any pending or sent faxes.

Contacts tab (Add a Contact)

The contacts tab lists all the contacts that are associated with your user name in the FaxFinder unit.

Right-click menu

By right-clicking on an existing contact you can **Edit** or **Delete** it.

By right-clicking in the empty area, you can **Add Contact** or **Refresh** the screen.

User Info tab

The user info tab lists your information as it is entered in to the FaxFinder unit.

Save (button)

The Save button will save any changes made to the User Info on the FaxFinder unit.

Retrieve (button)

The retrieve button will query the FaxFinder unit for the current user information and update what is displayed in the client software.

Options tab

In the options tab you can change the default settings that are used for faxing: *Max Attempts, Fax Priority, Fax Receipt, Try Interval*.

Save (button)

Click the save button to make these changes to the FaxFinder unit for this user.

Delete

Selecting this will delete the FaxFinder unit from use by this software. There is a delete confirmation window that will pop-up prior to actual deletion.

Set as Default

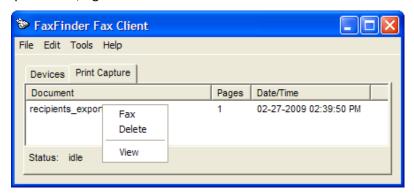
Selecting set as default will make the unit clicked the default unit for sending faxes through this software.

Properties

Selecting properties will bring up a window showing the FaxFinder unit type (FFx20 or FFx30), the IP address the unit is using and your user name and password. The password is replaced by asterisks for security.

Print Capture Tab (Main Window)

Any potential faxes sent from the print to FaxFinder option will be here, ready for additions, setting changes or scheduling. There are two columns to this field: *Document* (the name of the document ready to be scheduled) and *Pages* (the total number of pages in the document). To access the options for items in the print capture area, right-click on the document name.



Fax

Selecting this will open the Fax Scheduler window allowing you to change any parameters as needed and schedule your fax for a specific time or send it immediately. The Fax Schedule screen is covered earlier in this chapter.

Delete

Selecting this will permanently delete the document from the client software. Entries in the Print Capture tab will remain until they are manually deleted using this command.

View

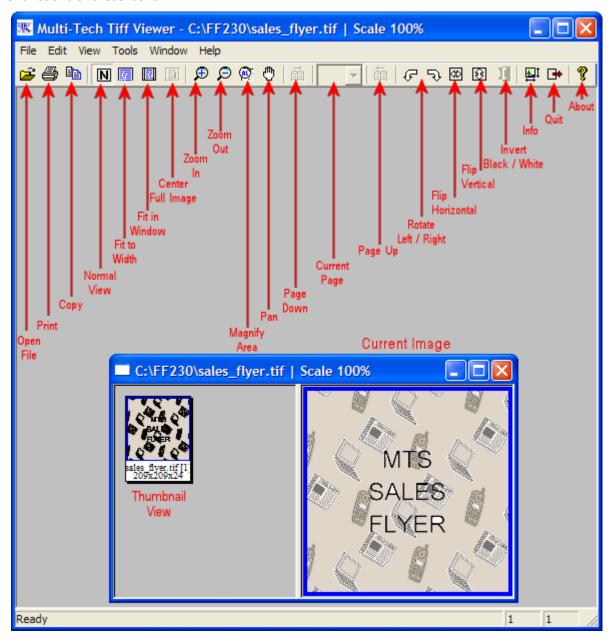
Selecting the view option will open the document (a TIFF file) with the program associated with its extension type; if you chose to associate TIFF files with the TIFF Viewer during the installation, that is what will open the file.

Using the Multi-Tech Tiff Viewer

The Multi-Tech Tiff Viewer program has a variety of features that enhance the viewing of fax messages in graphic file form (thumbnails, zooming, spot magnification, scrolling, rotating, etc.). The program can also manipulate and permanently alter the graphic files.

Toolbar Icons

The most commonly used functions are available as icons on the toolbar. In the diagram below, we label the functions of these icons.



While most of these features are common to many graphical programs, some warrant a bit of explanation, provided below.

Copy. The Copy function allows you to copy the fax file and insert it into a different application program. When you click the copy button, the current image will be copied to Windows Clipboard, from which you may then Paste into another applicable program or document. See "Importing Fax Images into Other Application Programs" below.

Pan (Omni-Directional Scroll). The "hand" icon allows you to bring any desired portion of the image into view by clicking and holding down the left mouse button and then moving the mouse to "drag" the image to where you want it.

Zoom to Selection. Click and drag with the mouse over the rectangular area you would like to view. The Multi-Tech Tiff Viewer zooms in sufficiently to fill the screen with the selected area.

Magnify Area (Spot Magnifying Glass). In this viewing mode, a magnifying glass icon (cursor) appears. It can be used in one of three ways to magnify any portion of the image: (a) Click over Area, (b) Click-and-Hold Over Area, (c) Scan the Graphic.

<u>Click over Area.</u> A secondary window will appear that shows the 'clicked-on' area magnified. You can adjust the size of the secondary window by dragging on its borders. You can re-locate the secondary window by putting the cursor inside the window, clicking, holding, and dragging.

<u>Click-and-Hold over Area.</u> Two additional windows will appear. The cursor itself becomes a small secondary window of fixed size. The same image also appears on a third window. You can adjust the size of the secondary window by dragging on its borders. You can re-locate the secondary window by putting the cursor inside the window, clicking and dragging.

<u>Scan the Graphic.</u> If you *click, hold, and drag*, you can scan the image in a magnified view. Two magnifying windows will appear as in the "Click-and-Hold Over Area" description above.

Thumbnail. The thumbnail shows a reduced size version of the current image as well as the dimensions. If you left-click on the thumbnail image, you will reset the current graphic to the original. *This will not undo any changes that were saved*.

Importing Fax Images into Other Application Programs

The **Copy** command in the Multi-Tech Tiff viewer program allows you to import the fax image into other application programs. A fax, in the TIF format can be **Copied** from the Multi-Tech Tiff viewer program and **Pasted** into a word processing program document. The Windows Clipboard will only hold one copy at a time, so make sure not to use any copy command until you have pasted the current image to the new location.