
FaxCenter Installation Guide

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Section I: Introduction

This section includes:

- [Introduction to FaxCenter](#) (I-1)
- [FaxCenter and server routing rules](#) (I-1)
- [About this guide](#) (I-1)
- [Related AccuRoute 4.1 documentation](#) (I-2)

Introduction to FaxCenter

FaxCenter is a fax routing application. While many inbound faxes will be routed directly to recipients in your company, there are instances when someone needs to review an inbound fax, determine its most appropriate recipient or destination, and send the fax to that recipient or destination. FaxCenter offers this ability.

FaxCenter and server routing rules

You can set up an inbound routing rule that determines which faxes need to be reviewed and routed to the appropriate recipients and destinations. When these inbound faxes arrive at the server, they are routed to FaxCenter users. FaxCenter users determine the most appropriate recipients and destinations for each fax and route faxes accordingly.

About this guide

As you follow the procedures in this guide, you will:

- Install FaxCenter on client systems.
- Add FaxCenter users to Registered Users in the Administrator and give them permissions to run FaxCenter and use the appropriate features.
- Set up inbound routing rules on the server that determine which faxes get routed to FaxCenter.

Once you have completed these steps, FaxCenter users can route faxes to e-mail recipients, fax machines, network printers, and document management systems. They may also be able to release outbound faxes in Registration Pending to secure destinations.

Related AccuRoute 4.1 documentation

For more information about FaxCenter and other AccuRoute products, refer to the [AccuRoute v4.1 documentation home page](#) to access:

- Readmes and release notes
- DMS Libraries quick start guides
- User guides and online help
- Administrator guides
- Installation and upgrade guides

Section 2: Requirements

This section includes:

[AccuRoute Server requirements](#) (2-1)

[Client hardware and software requirements](#) (2-1)

AccuRoute Server requirements

The system where you will install FaxCenter must meet the following minimum requirement:

- AccuRoute v4.1

Client hardware and software requirements

The systems where you will install FaxCenter must meet the following minimum requirements:

- Pentium®-class processor, 400 MHz or faster
- Windows 8, Microsoft Windows 2008, MS Windows 2003 SP2, or MS Windows Vista
- 2 GB hard drive with a minimum of 50 MB free space
- 128 MB RAM
- an image viewer compatible with your operating system

Section 3: Installation

Installing FaxCenter

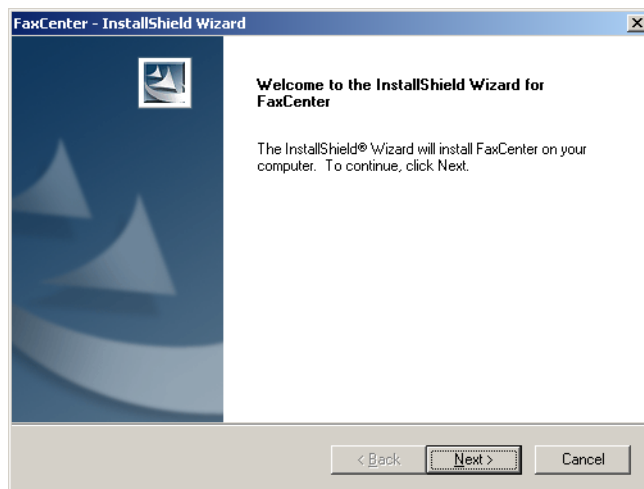
The setup program for this application is located on the server in the following directory:

`\Omtool\OmtoolServer\Clients\FaxCenter.`

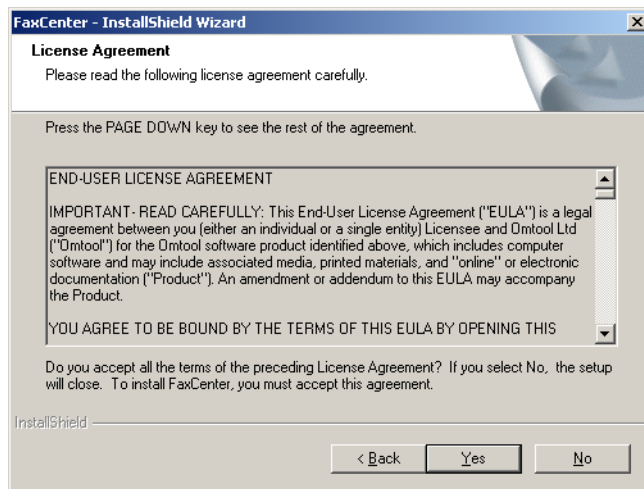
You can run the setup from the server or the client. If you run the setup from the client, share the `\Omtool\OmtoolServer\Clients\FaxCenter` directory on the server so that you can access it from the client, and map a drive on the client to the `\Omtool\OmtoolServer\Clients\FaxCenter` directory on the server if necessary.

To install FaxCenter:

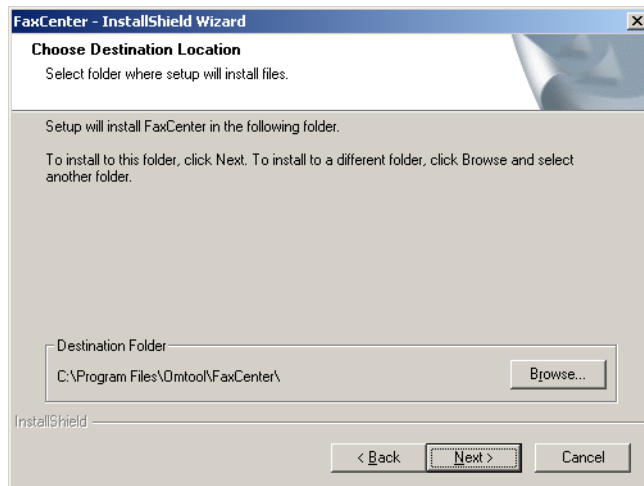
- 1 Log on to the server (if necessary), navigate to the `\Omtool\OmtoolServer\Clients\FaxCenter` directory, and double-click `setup.exe`. The **InstallShield Wizard for FaxCenter** begins and displays the **Welcome** screen.



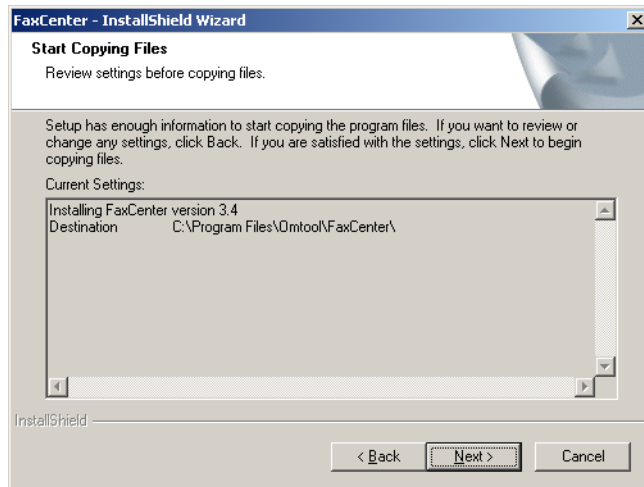
2 Click **Next**. The **License Agreement** screen appears.



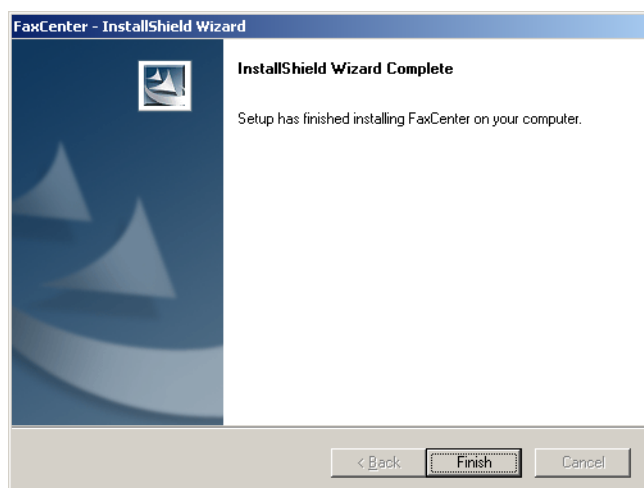
3 Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The **Choose Destination Location** screen appears.



- Click **Browse**, navigate to the location where you want to install FaxCenter, select the installation directory, click **OK**, and click **Next**. The **Start Copying Files** screen appears.



- Review the installation settings and click **Next** to begin installing FaxCenter. The **InstallShield Wizard Complete** screen appears.



- Click **Finish**. The installation is complete.

Section 4: Required Configuration

This section includes:

- [Registering FaxCenter users](#) (4-7)
- [Creating routing rules for inbound faxes](#) (4-9)

Registering FaxCenter users

In order to run FaxCenter, FaxCenter users must be Registered Users on the server. When you create a Registered User, you can enable the user as a FaxCenter user, assign the user permissions to use FaxCenter features, and configure other properties for this user.

Use the following procedure to create a user account in the Administrator under *Registered Users*. If you have already created a user account for the FaxCenter user, you will modify the user's FaxCenter properties.

To create a new user or modify the FaxCenter properties of a registered user:

- 1 Start the Administrator.
- 2 Create a new user or modify the properties of an existing user:
 - ▶ **To create a new user:** Right-click **Registered Users** in the console tree and select **New > User**. Type the name and e-mail address of the FaxCenter user in the **Name** and **E-mail** text boxes.
 - ▶ **To modify the properties of an existing user:** Click **Registered Users** in the console tree and double-click a registered user in the details pane.
- 3 Click the **FaxCenter** tab.
- 4 If you want to enable this user to use FaxCenter, select the **Enable this user as a FaxCenter user** option, and then complete the following steps.
- 5 If you want to assign a FaxCenter password to this user, type the password in the **Password** and **Confirm** text boxes. If you do not want to assign a password to this user, leave the text boxes empty.
- 6 When a FaxCenter user selects a fax in FaxCenter, the fax becomes locked so other FaxCenter users cannot access the same fax. (This prevents multiple FaxCenter users from modifying or routing the same fax.) Type the number of minutes you want FaxCenter to wait before it unlocks the fax this user has selected in the **Automatically unlock fax after ___ minutes** spin box.
- 7 You can create an e-mail address filter that limits the users whose e-mail addresses appear in the **FaxCenter Routing** dialog box.

Note The filter does not prevent the FaxCenter user from routing faxes to other recipients and destinations.

If you want to create a filter, do one of the following:

- ▶ To create an e-mail address filter, use the following string:
`email=[e-mail address of a user account]`
 For example: `email=user@company.com`
- ▶ To create a site filter, use the following string:
`site=[name of the Exchange 5.5 site]`
 For example: `site=Finance`
- ▶ To create a name filter, use the following string:
`name=[alias of a user account]`
 For example: `name=jsmith`

Note The values you use in filters are not case-sensitive.

Tip You can use an asterisk to indicate a wildcard. For example, if `email=*@company.com`, then FaxCenter displays the e-mail accounts in the domain you specified as potential routing destinations—in this case, “company” is the domain you specified.

8 In the **Allow User to** section, select the check box beside each option you want to enable for this user:

- ▶ **Delete Faxes** - Allow this user to delete faxes from the **Processed Items** list in FaxCenter.
- ▶ **Move to processed** - Allow this user to move faxes from the **New Items** list into the **Processed Items** list.
- ▶ **Combine Faxes** - Allow this user to combine multiple faxes and route them as one combined fax.
- ▶ **View Entire Fax** - Allow this user to view the entire fax. If this option is not enabled, the FaxCenter user can view only the first page of each fax.
- ▶ **Enter originator information when routing** - Allow this user to complete the **Routing Transaction Description** section¹ of the **Route Selected Item** dialog box when routing a fax. This configuration setting has two additional options that you can enable:
 - ▲ **User may leave From empty** - Select this if you want the FaxCenter user to be able to leave the **From** field under **Routing Transaction Description** empty, or clear this check box if you want to require the user to provide the From information.
 - ▲ **User may leave Company empty** - Select this if you want the FaxCenter user to be able to leave the **Company** field under **Routing Transaction Description** empty, or clear this check box if you want to require the user to provide the Company information.
- ▶ **Enable or Disable Afterhours Processing** - Allow this user to set **After Hours**² for all FaxCenter users associated with the server.

1. These fields allow the FaxCenter user to provide the fax recipient with information about the original fax sender. Depending on how you configure notification messages for faxes that have been routed from FaxCenter to e-mail recipients, these fields (From and Company) can appear in the notification message from the server.
2. You can create inbound or outbound routing rules that specify how the server should handle messages when it is after hours in your company. While this feature is versatile and can be configured in a variety of ways, it is most commonly used in conjunction with FaxCenter. If your company uses FaxCenter, people in your company rely on FaxCenter users to route inbound faxes in a timely manner. After Hours prevents someone in your company from missing an important fax when FaxCenter users are not in the office. When it is after hours in your company, you might want to consider routing inbound faxes to network printers so that people can retrieve them when they arrive. For more information about After Hours, refer to the Administrator help: <http://www.omttool.com/omttoolserver/v331/documentation/admin/index.htm>

- ▶ **Release Registration Pending (HIPAA)** - Allow this user to release faxes from Recipient Registration Pending to secure destinations.

Important Since releasing a fax can have legal ramifications in some industries, you should make sure that the FaxCenter user understands the process of secure delivery.

- ▶ **View all Faxes in FaxCenter** - Allow this user to view all faxes in FaxCenter, even those faxes that have not been routed directly to this user for processing. When this option is enabled, this user can view all faxes on the server that currently reside in the FaxCenter Routing state. Also, this user can see faxes in all queues, including **New Items**, **Processed Items**, **Found Items**, and **Registration Pending**.
- 9 Select the **Route faxes as** check box if you want the server to send the routing recipient a notification message that includes a name and an e-mail address for this FaxCenter user. If you select the check box, provide the following information:
 - **Name** - Type the name you want to appear in the **From** field on all faxes that this user routes from FaxCenter. For example, the name can be the name of the user or another name, such as "John Smith, fax router" or "John Smith".
 - 10 **E-mail** - Type the e-mail address you want to appear in the **From** field on all faxes that this user forwards from FaxCenter. For example, the e-mail address can be associated with the FaxCenter user or another person who you want to receive all replies to the forwarded fax.
 - 11 Click the **Select Columns to View** button if you want to configure the columns that this user will view in FaxCenter. Modify the column properties and save your changes.
 - 12 Click **OK** to save your changes to the properties for this registered user, or click on another tab to modify more properties for this user.

Note When you modify a user's FaxCenter permissions while that user is currently logged into FaxCenter, the new permissions will not take effect until the next time the user logs in to FaxCenter.

Creating routing rules for inbound faxes

Using the following procedure, you will create an inbound routing rule that determines the faxes that should be routed to FaxCenter users. Once the server routes these faxes to FaxCenter, FaxCenter users will review each fax, determine the most appropriate recipients and destinations for the fax, and route the fax accordingly.

To create a rule for routing inbound faxes to FaxCenter:

- 1 Double-click **Rules** in the console tree.
- 2 Right-click **Inbound** and select **New | Rule**. The **Specify the Criteria for this Rule** screen appears.
- 3 Click the **Add** button, select a criterion for inbound faxes that should match this rule, and click **Next**.
- 4 Specify the parameters for the criterion you selected in the previous step and click **Finish**.

- 5 Add more criteria for inbound faxes that should match this rule, if desired, and click **Next**. The **Specify the Actions to take for this Rule** screen appears.
- 6 Click **Add**. The **Add Rule Action** screen appears.
- 7 Select **FaxCenter** and click **Next**. The **Route to FaxCenter** screen appears.
- 8 Select the **FaxCenter user** option only if you want the inbound faxes that match this rule to be routed to a particular FaxCenter user, and then select the FaxCenter user from the drop-down list. (If you do not select this option, inbound faxes that match this rule will be routed to all FaxCenter users.)

Type the number of hours a fax can reside in FaxCenter in the **Expiration Time** spin box. (If a fax has not been routed to a recipient or other destination within the allotted time, the server fails the fax and removes it from FaxCenter.)

Click **Finish**.

- 9 Add any other actions for inbound faxes that match this rule, if desired, and click **Next**. The **If any Action(s) fail do the following** screen appears.
- 10 Add the actions you want to apply to faxes that match this rule if any of the primary actions fail (optional), and click **Next**. The **Specify a name for this rule** screen appears.
- 11 Type a friendly name for the rule in the text box, and configure the other options in this screen as desired, and click **Finish**. The new rule wizard creates the rule and displays all the inbound routing rules.

Now that you have created an inbound routing rule for FaxCenter, order the inbound routing rules as desired.

Section 5: Verification

This section includes:

- [Sending a test fax](#) (5-11)
- [Retrieving the test fax in FaxCenter](#) (5-11)
- [Troubleshooting the test fax](#) (5-12)
- [Routing the test fax from FaxCenter to an e-mail account](#) (5-13)

Sending a test fax

Using the following procedure, you will send a test fax. Before you send the fax, you must consider the inbound routing rule you created for FaxCenter. The inbound fax will only be routed from the server to FaxCenter if the fax matches the criteria you specified in this routing rule. If necessary, you might need to modify this rule for the purposes of testing the fax. For example, if the routing rule specifies that all inbound faxes will be routed from the server to FaxCenter on Fridays only, you might need to modify this rule to include the day you are sending the test fax—unless you are sending the test fax on a Friday.

To send a test fax:

From any fax machine—including those inside your company, send a fax to a fax number in your company.

Tip If you want to track the progress of the fax on the server, you can view the journal for that fax in the Administrator. The journal contains a log of events related to that fax.

Retrieving the test fax in FaxCenter

Using the following procedure, you will launch FaxCenter on the client system and locate the test fax in the New Items queue.

To locate the test fax:

- 1 Log on to the client system.
- 2 Click the **Start** button and select **Programs > FaxCenter > FaxCenter Console**. The **Connect to Server** dialog box appears.
- 3 Type the computer name or IP address of the server in the **Server** text box, type the e-mail address of the FaxCenter user in the **E-mail** text box, type the appropriate password for the FaxCenter user in the **Password** text box, and click **Connect**.

- 4 Click on the test fax in the **New Items** queue to view it in the page view pane.

Tip If the test fax does not appear in the **New Items** queue, you can troubleshoot the fax from the Administrator. See “Troubleshooting the test fax” on page 12.

Note Depending on the permissions you configured for the FaxCenter login account, you might only be able to view the first page of the fax or the entire fax.

Troubleshooting the test fax

You can troubleshoot the test fax by:

- tracking the status of the test fax on the server
- verifying the criteria defined in the inbound routing rule
- determining whether all FaxCenter users or specific FaxCenter users should have received the test fax

You'll find more information about each of these concepts in this section.

Tracking the status of the fax on the server

You can track the progress of the test fax on the server using the Administrator. If the server did not route the inbound fax to FaxCenter, did not deliver the fax for another reason, or paused during the processing of the fax, you can view the journal for that fax and see a log of events related to that fax.

Once the server routes the test fax to FaxCenter, you can view the journal for that fax in FaxCenter.

To view the test fax on the server:

- 1 Start the Administrator.
- 2 Expand the **Messages** item in the console tree and select **In Process**.

The **In Process** folder displays all messages and faxes being processed on the server. In the details pane, the top section displays a set of bar graphs, also called barometers, that represent the different processing phases of a fax. You can resize the Administrator window if necessary to view all the barometers.

Each barometer has a number that indicates the number of items in that processing phase. As items move through various phases of processing, the visual indicators on the barometers change in real-time.

Using these barometers, you can locate the processing phase of your test fax and watch it move through the other phases until the server dispatches the fax to FaxCenter.

- 3 Click the option button above the barometer you want to view.

If you cannot locate your test fax in the **In Process** queue, repeat these steps in the **History** queue.

- 4 Right-click on the test fax and select **Properties**.

5 Click the **Journal** tab.

Review the list of events. (Double-click an event to view more information about it.) If the server did not route the inbound fax to FaxCenter, did not deliver the fax, or paused during the processing of the fax, the journal provides you with the information you need to troubleshoot the issue.

Tip If you make any modifications to the settings on the server and you want to send your test fax again, you can resend the fax from the Administrator. For more information, refer to the Administrator help: <http://www.omtool.com/omtoolserver/4.1/documentation/faxcenter/index.htm>

Checking inbound routing rules

When you troubleshoot your test fax, make sure that you created an inbound routing rule for FaxCenter. See “Creating routing rules for inbound faxes” on page 9.

Also, verify that the details in this rule will route faxes to FaxCenter and that the appropriate FaxCenter users should receive faxes. If you configured the server to route faxes to all FaxCenter users, all FaxCenter users should be able to view the test fax in the New Items queue. If you configured the server to route faxes to a particular FaxCenter user, only that user should be able to view the test fax in the New Items queue.

Verify the installation of an image viewer

See “Client hardware and software requirements” on page 1. If an image viewer is not installed, you will not be able to view the test fax in FaxCenter.

Routing the test fax from FaxCenter to an e-mail account

Once you can view the test fax in FaxCenter, you should route it to an e-mail account that you can access. After you route the fax from FaxCenter to an e-mail account and retrieve the fax from the e-mail account, you will have simulated the steps that will occur when your company receives actual faxes.

Note When a FaxCenter user routes an inbound fax, the user can route the fax to e-mail recipients, network printers, fax machines, and your company’s document management system or document repository. However, you will route the test fax to an e-mail account because it will be easy for you to retrieve it. This also allows you to test the mail connector that moves faxes to your mail server for delivery.

Using the following procedure, you will open the test fax in FaxCenter and route it to an e-mail account that you can access.

To route the test fax to your e-mail account:

- 1 Start FaxCenter, log in, and click on the test fax in the **New Items** queue. (If the **New Items** queue does not appear, click **View** and select **New Items**.)
- 2 Click **Edit** and select **Route Item**. The **Route Selected Item** dialog box appears.
- 3 Select your e-mail address from the list on the left and click the **Add Recipient** button, or type your e-mail address in the **Type destination or select from list** text box and click the **Add** button.

- 4 In the **Pages to route** text box, indicate the pages you want to route by selecting **All Pages** from the drop-down menu or typing the page numbers in the text box.
- 5 Under **Routing Transaction Description**, type the name of the original sender in the **Name** text box, the original sender's company name in the *Company* text box, and your comments about the fax in the **Comments** text box.

Depending on the permissions you configured for the FaxCenter login account, you might have granted permissions for this user to leave the **Name** or **Company** fields empty.

- 6 Click **Route**. The server prepares and sends the fax to the destination you specified, and FaxCenter moves the fax to the Processed Items queue.
- 7 Log in to the e-mail account where you routed the test fax.
- 8 In your inbox, you should see a message indicating that a FaxCenter user has routed a fax to you. Follow the instructions in the e-mail to retrieve the test fax.