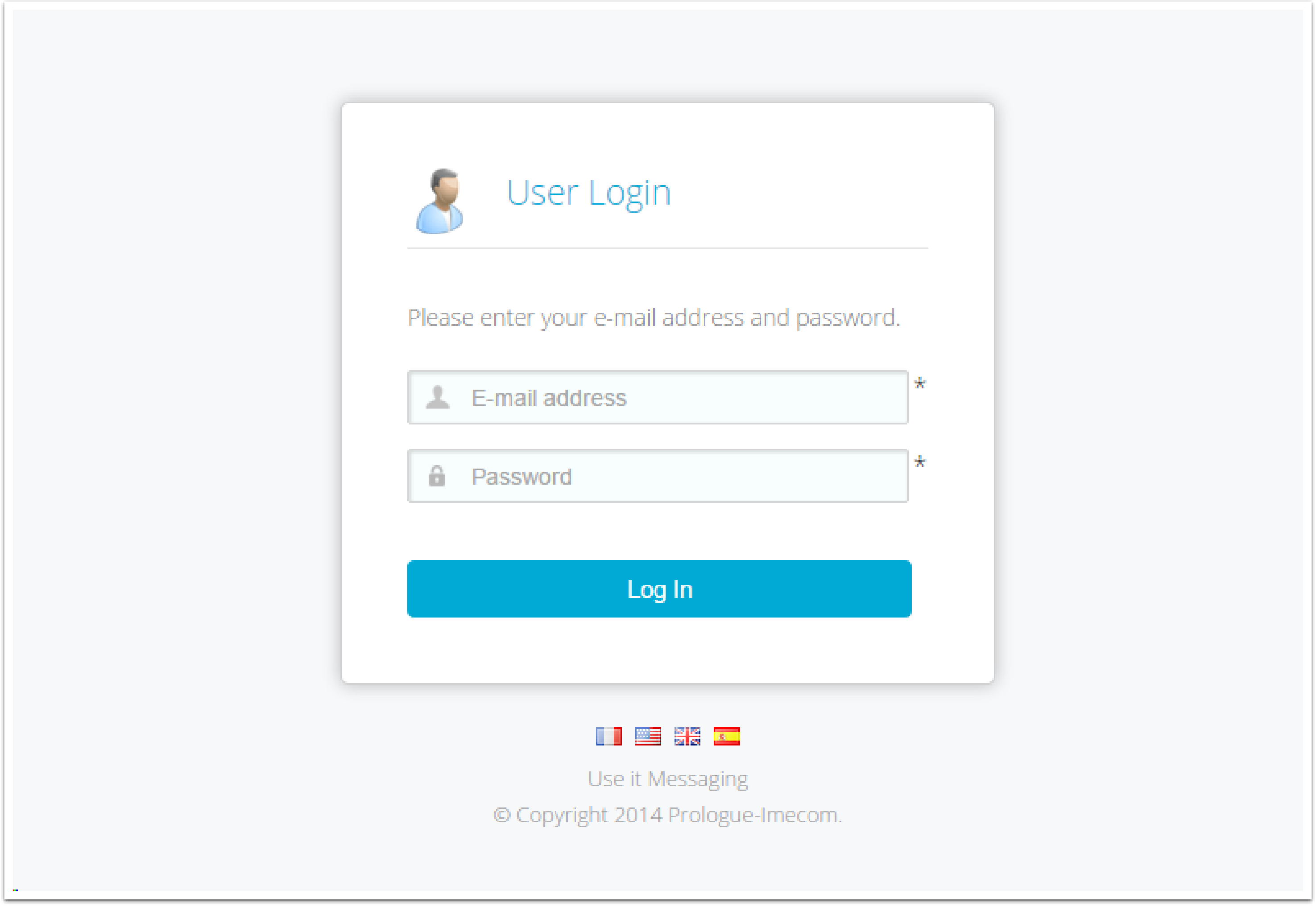
Web site User

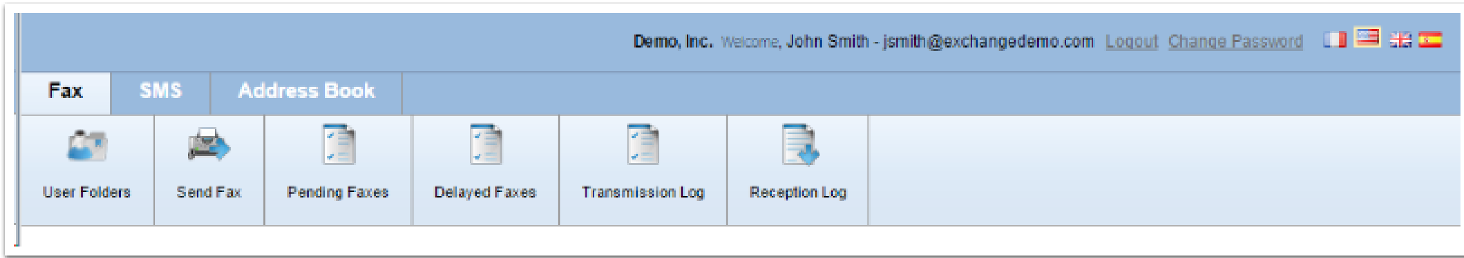
The User web pages affords a user the ability to send and receive faxes.

To authenticate to the site, you must be declared as a user within an organization.

- In the address bar of your web browser, type in the URL of the web server, the following screen appears:



- Type in your email address in the Enter your e-mail address block.
- Enter your password in the Password block.
- Select your default language preference, English, French or Spanish.
- Click on the Log In button, The Welcome window follows:



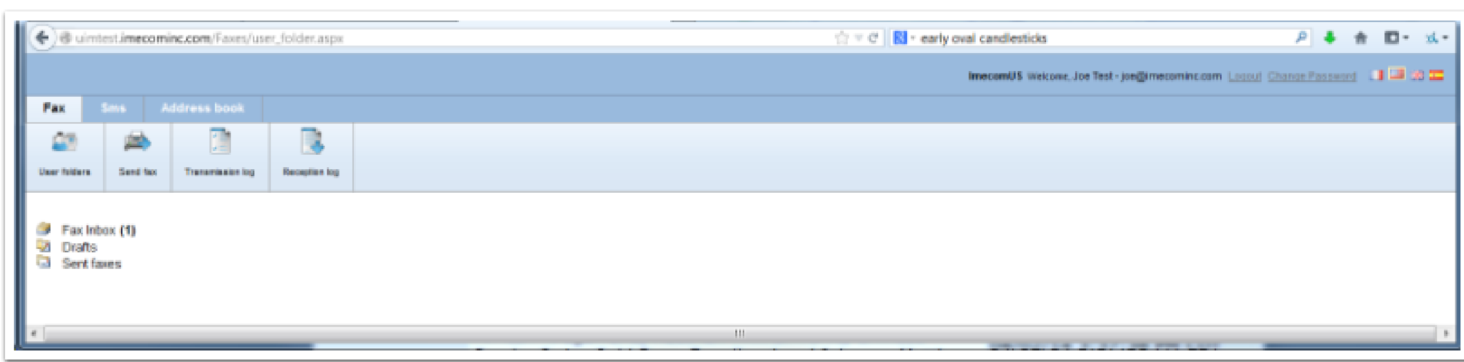
Fax tab – User Folders

From the Fax tab, the following options are available, User Folders, Send Fax, Transmission Log and

Reception Log.

From the User Folders you may choose the Fax Inbox to see faxes received, faxes in work from the Drafts

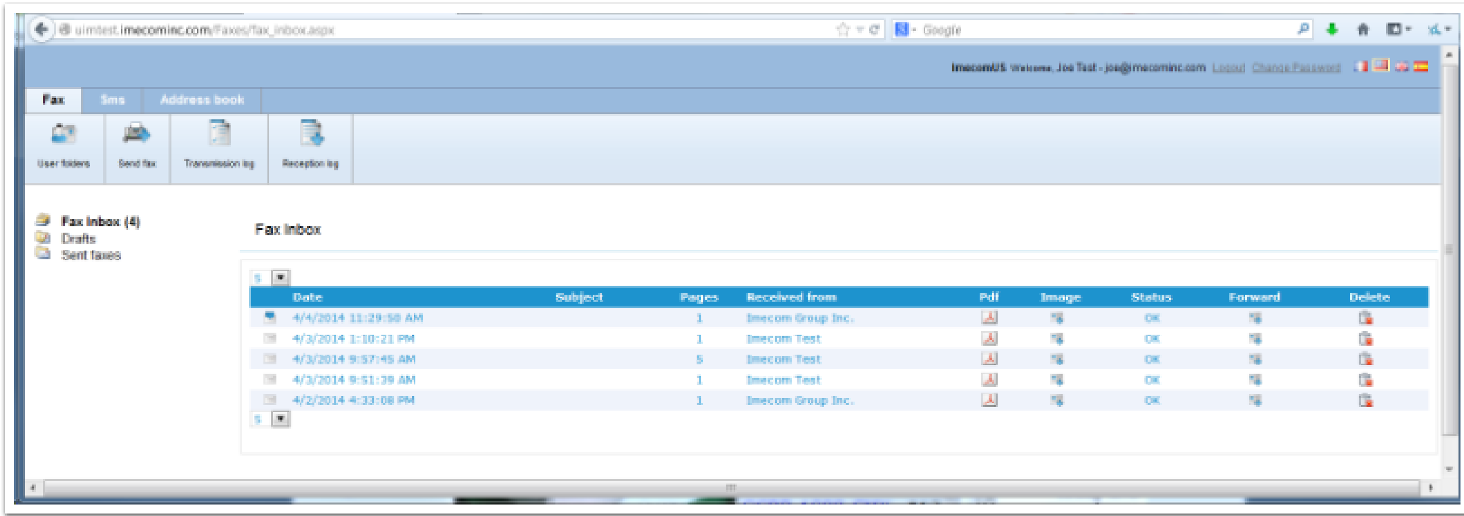
folder or your Sent Faxes.



Fax Inbox

Received faxes are saved in the Fax Inbox. An unread fax may be identified by the closed envelope icon

whereas read faxes show an open envelope. All faxes are displayed in blue.



Date: Is the date/time of reception.

Subject: The subject of received faxes is set by the administrator of the organization.

Page(s): Indicates the number of pages received.

Received from: Shows the sender of the fax.

PDF: The Pdf button allows you to download or download/open the fax as a PDF file, (the fax image is placed in a PDF document).

Image: Allows you to download or download/open the fax in TIFF format. The file will open in the application associated with TIFF files on your machine.

Status: Indicates the status of the received fax, if OK, the fax was received correctly without missing pages.

Forward: Allows you to forward the fax to another user within the organization.

The Fax Inbox view can be set to show 5, 10 or 15 lines.

Drafts

Creation date: This is the date/time of creation of your draft.

Subject: Shows the subject as specified in the fax message being drafted.

State: This field remains blank in draft messages.

Priority: The priority of the document as specified in the fax draft.

Code 1 and Code 2: These fields can be used to include specific information particular to a fax. If there are

multiple recipients this information will be included in each transmission, (optional field).

Page count: This will display only when the draft has been converted to fax format. Conversion will occur

when requesting a preview under the options tab when viewing a specific draft.

PDF: You can view the entire draft in PDF format once it has been converted to fax (TIFF) format. This

option will become available only after requesting a preview under the option tab when viewing a specific

draft.

Delete: This button allows you to delete a specific draft.

The drafts view can be set to show 5, 10 or 15 lines.

Sent faxes

Number of records: The Sent Faxes view can be set to show 5, 10 or 15 lines.

Creation date: This displays the date/time of the creation of the transmission request.

Subject: Shows the subject of the transmission request.

State: Shows the current state of the transmission request.

Priority: The priority of the transmission request as defined by the administrator, by default the Priority is set to Normal.

Code 1 and Code 2: These fields can be used to include specific information particular to a fax. If there are

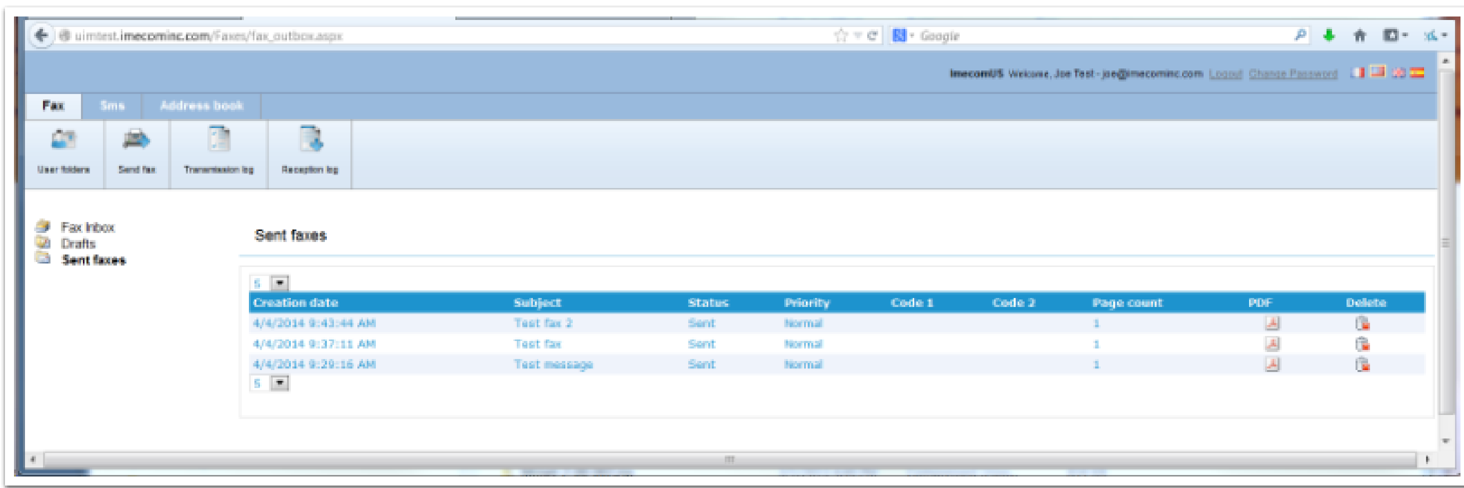
multiple recipients this information will be included in each transmission, (optional field).

Page count: Will display once the transmission request has been converted to fax (TIFF) format.

PDF: You can view the transmitted document in PDF format once it has been converted to fax (TIFF)

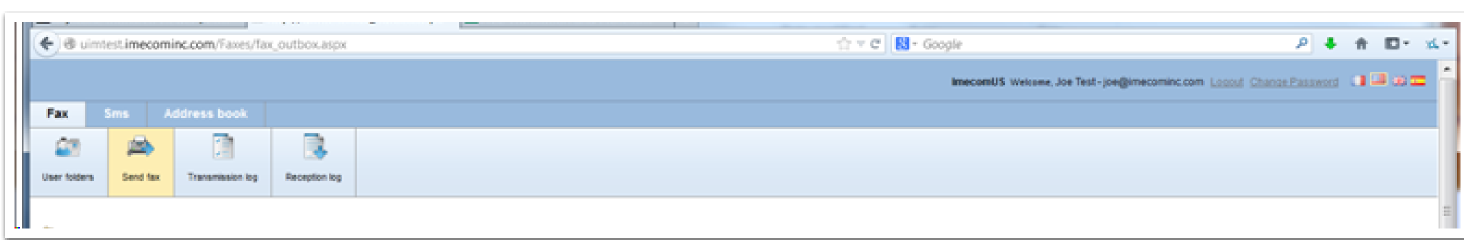
format.

Delete: This button allows you to delete a specific sent item.

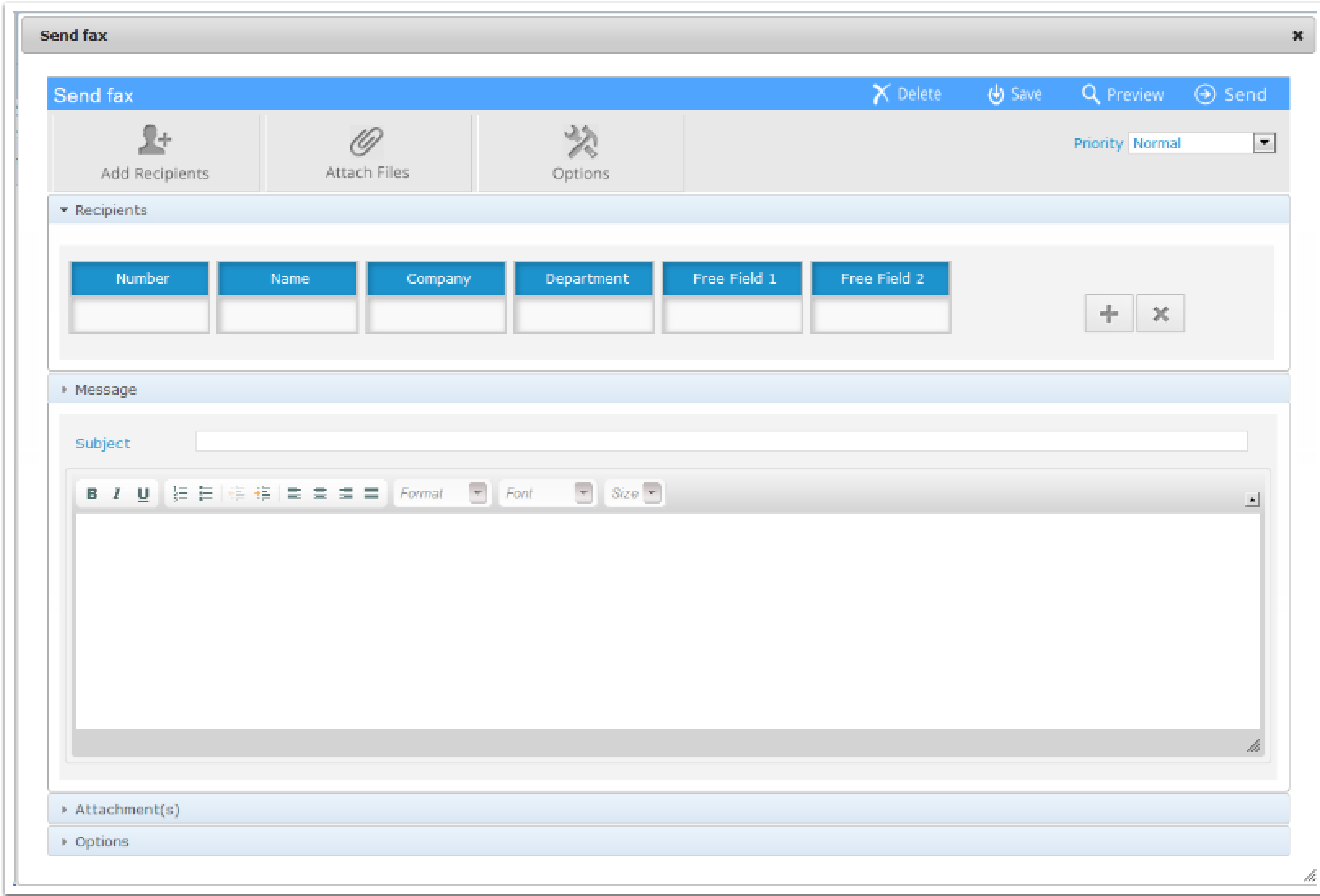


Fax tab - Send fax

From this tab a user can compose and send a fax.



Clicking on the Send fax button will cause the main Send Fax window to appear:

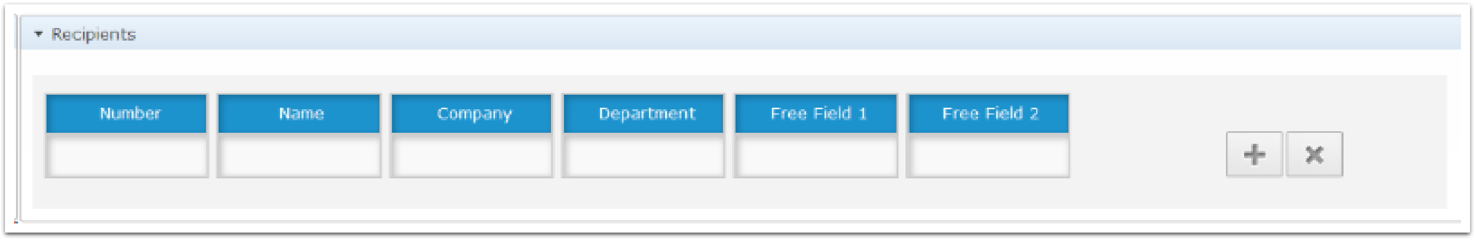


This window is composed of various commands or buttons and is divided into 4 principle sections:

- Recipients,
- Message,
- Attachment(s),
- Options.

The details and functions of each section are provided below:

Recipients section



Number: Number to send fax to

Name: Name of the recipient

Company: Company name of the recipient

Department: Department name of the recipient

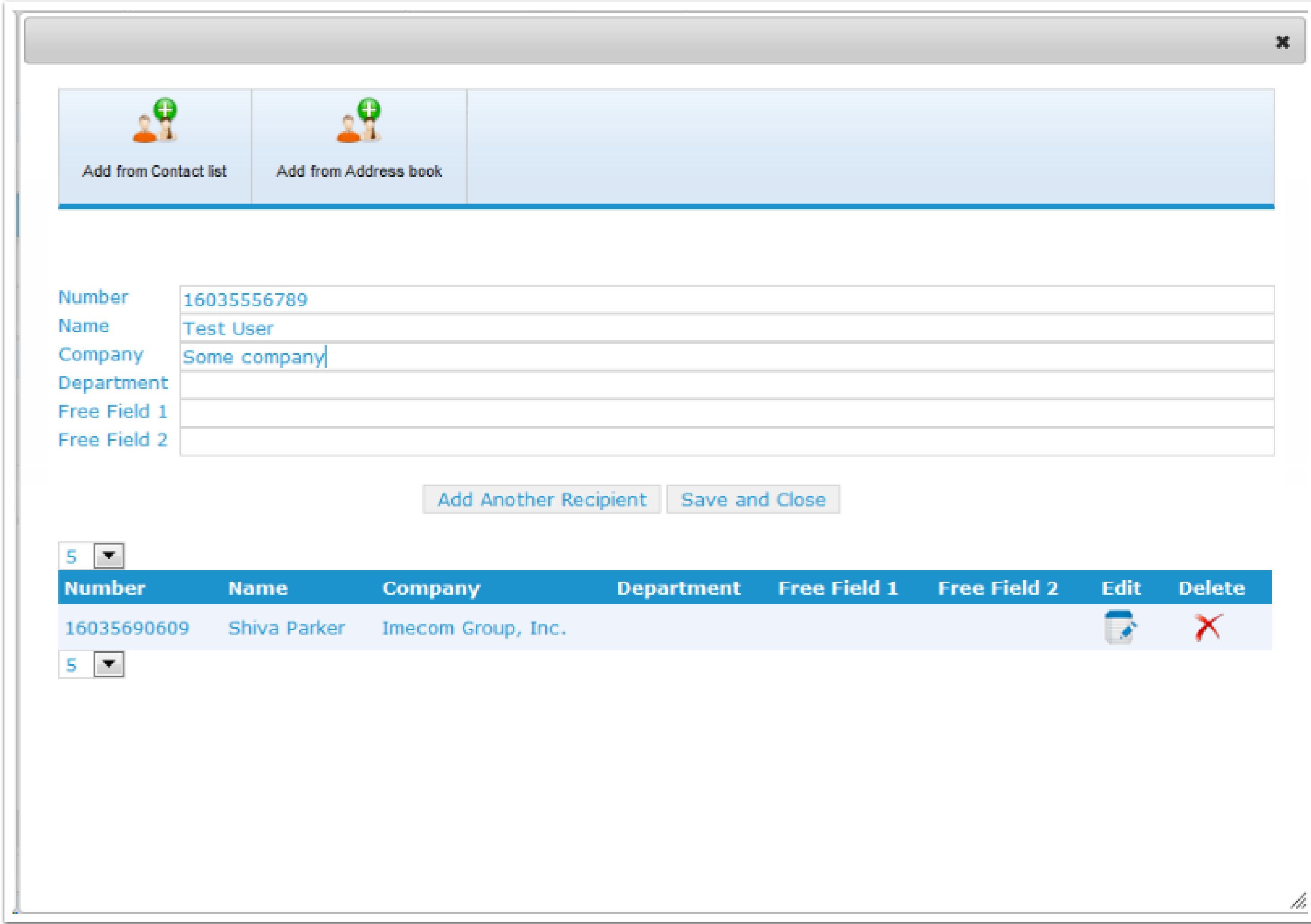
Free field 1: Specific to the recipient, provided for sender use to associate information with the fax (supplier

code, client ID, Invoice No, etc…), This information can be used by an archiving system to sort faxes.

Free field 2: Specific to the recipient, provided for sender use to associate information with the fax (supplier

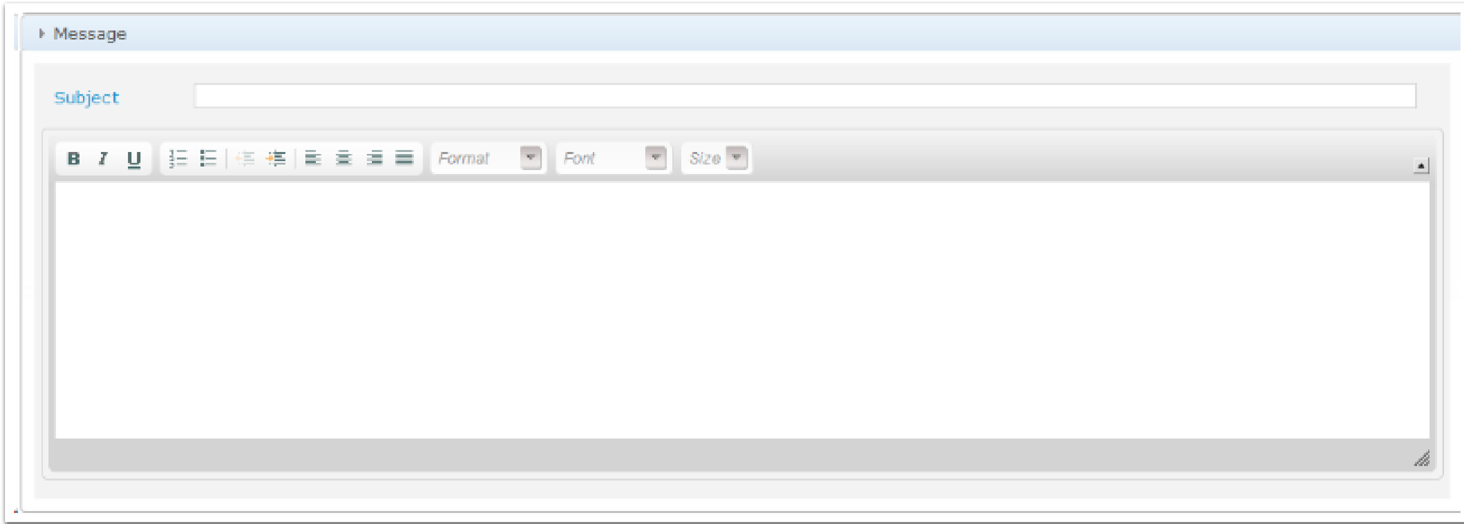
code, client ID, Invoice No, etc…), This information can be used by an archiving system to sort faxes.

Recipients may be added by directly typing in the provided fields or by clicking on the Add Recipients button. The Add Recipients button allows recipients to be added from Contact lists or Address books as well as directly.



Remark: Contact Lists and Address Books are defined via the Address Book tab and not from the Send fax tab (see the section on creating a Contact list or an Address book).

Message section



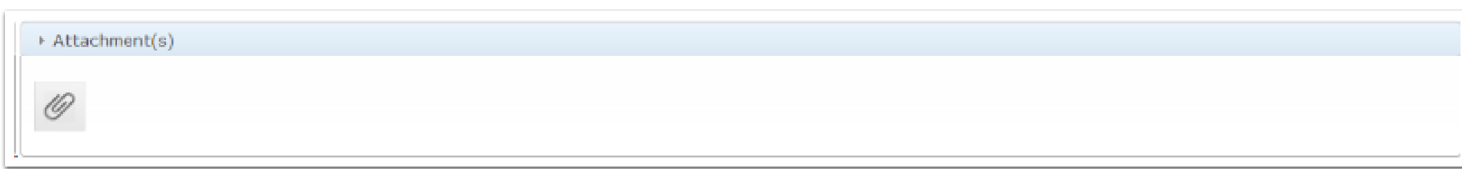
Subject: This field is provided for the subject of your message.

Message body: This field is provided for the content of your message. Text typed into this field may be

formatted as rich text with all the associated features/formatting available on the menu bar above the

Message body section.

Attachment(s) section

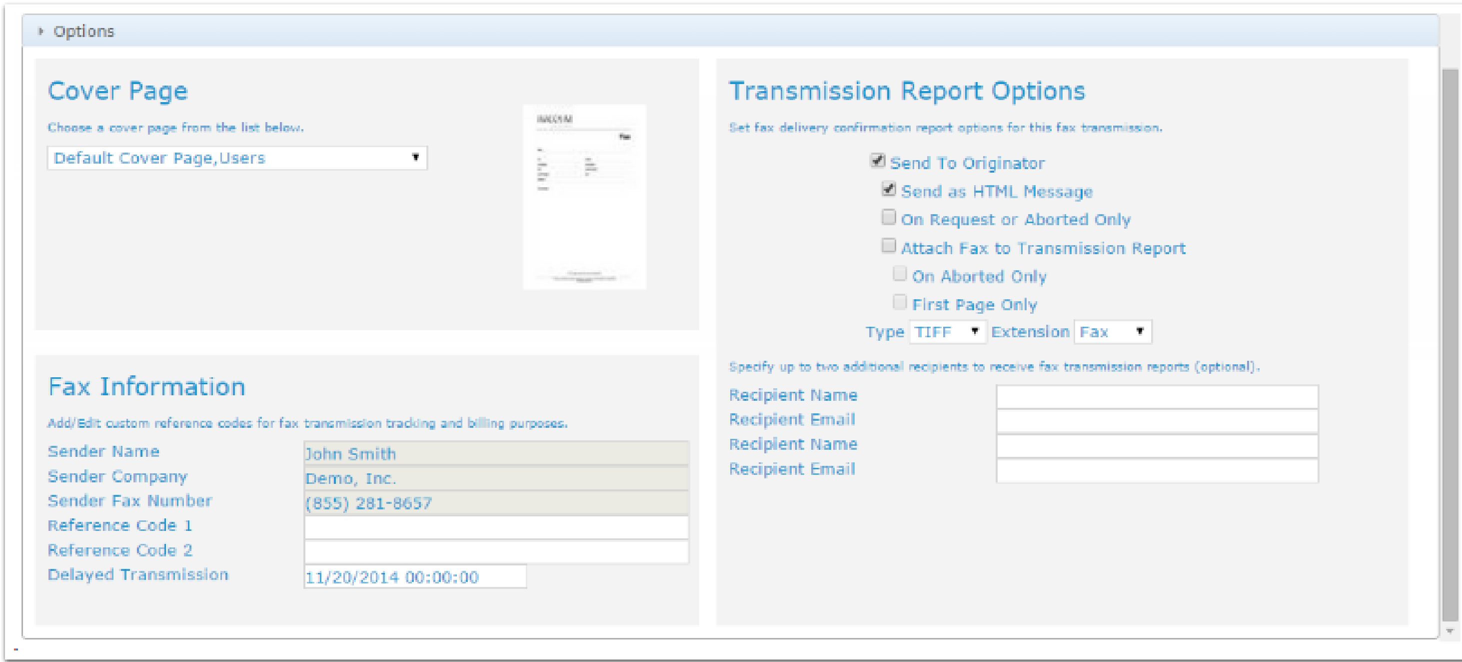


Clicking on the paper clip in the Attachment(s) section will display a dialog box allowing you to browse your

directory structure to locate and attach the documents desired.

You may also use the Attach Files button on the top menu bar on the Send Fax main window.

Options section



The Options section allows you to further define parameters for the fax request using the following three

options:

Cover Page: The drop-down menu in this section allows you to select any cover page made available by

your fax administrator.

Fax Information: This area can be used to add or edit custom reference codes.

Code 1: Provided for sender use to associate specific information to the fax (supplier code, client ID, Invoice

No, etc…). This information can be used by an archiving system to sort faxes.

Code 2: Provided for sender use to associate specific information to the fax (supplier code, client ID, Invoice

No, etc…). This information can be used by an archiving system to sort faxes.

Delayed Transmission: Allows you to set a date and time for the transmission to commence.

Transmission Report Options: This area allows you to set the options for the fax transmission report.

Send to Originator: When selected will send a transmission report to the fax originator. The format and contents depend on the additional selections.

- Send as HTML Message: When selected, will send the email transmission report in HTML format.

- On Request or Aborted Only: When selected will only send a transmission report if one is requested or

if the fax fails, otherwise a transmission report will be sent for all fax requests.

Attach Fax to Transmission report:

- On Aborted Only.

- First Page Only.

Type PDF: If selected, the attached fax will be in PDF format.

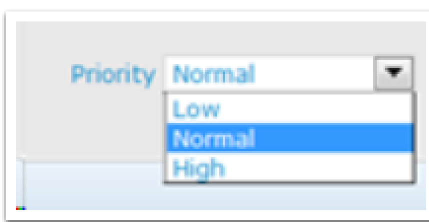
Type TIFF: If selected, the attached fax will be in TIFF format.

It is also possible to send transmission reports to destinations that were not the originator of the fax

request. Up to two additional email addresses may be specified to receive the transmission reports.

These additional options may also be set by clicking on the Options button on the main Send Fax screen.

Priority:



Low: The fax is processed last in the waiting list.

Normal: The fax is processed according to its order of arrival.

High: The fax is processed next in order.

Delete: Selected fax is canceled.

Save: The fax will be saved in the Drafts list,

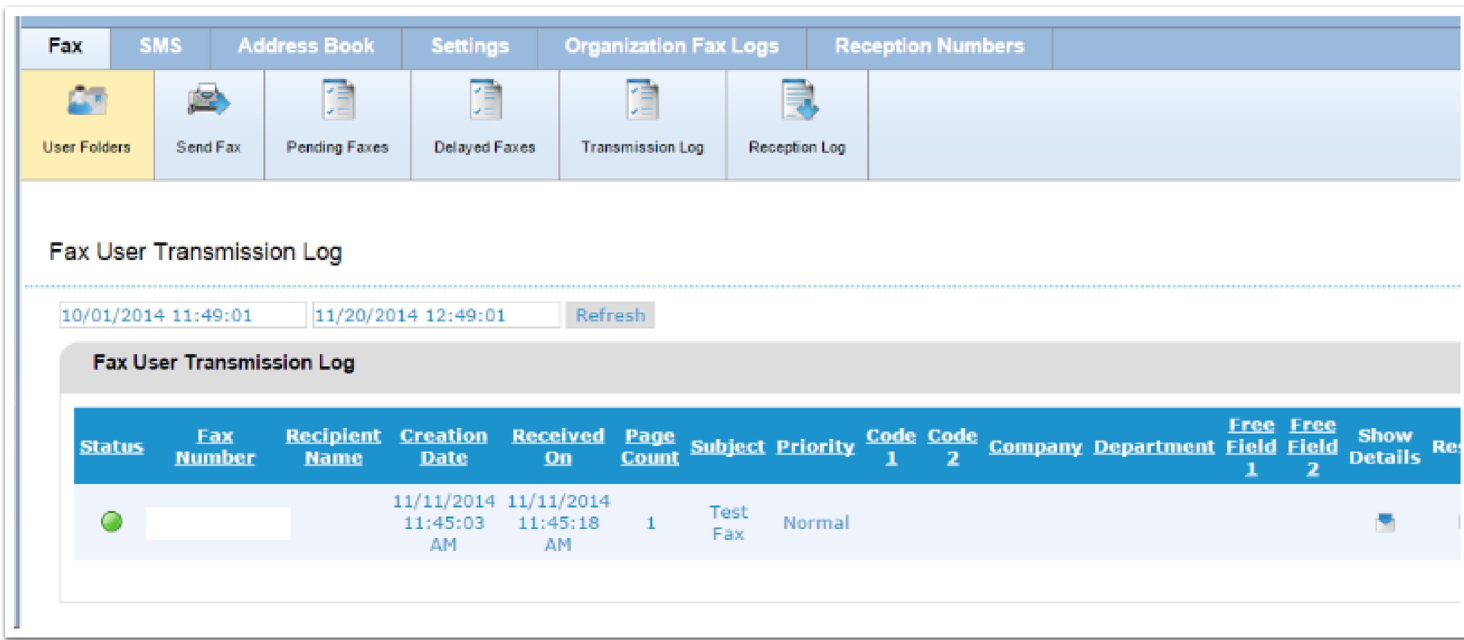
Preview: Allows the fax to be previewed before sending to verify its content. Preview is not immediate, the fax must first be converted to sending format. Once converted, the preview can be seen under the Drafts

folder.

Send: Submission of the fax for conversion and transmission.

Fax tab - Transmission log

The Transmission log shows the history of fax requests for the logged in client. It is possible to show the transmission records for the last day, last week, last two weeks, last month, last three months or all transmission records.



Status: This column indicates the status of each transmission.

Fax number: Indicates the destination fax number.

Recipient Name: Indicates the name of the recipient.

Creation date: Indicates the date/time of creation of the fax request.

Received On: Indicates the date/time of the actual fax transmission.

Page count: Indicates the number of pages sent.

Subject: Indicates the subject given to the fax request.

Priority: Indicates the priority which was given to the fax request.

Code 1: Indicates the information entered in this field when creating the fax.

Code 2 : Indicates the information entered in this field when creating the fax.

Company: Indicates the recipients company.

Department : Indicates the recipients department.

Free Field 1: Indicates the information entered in this field when creating the fax.

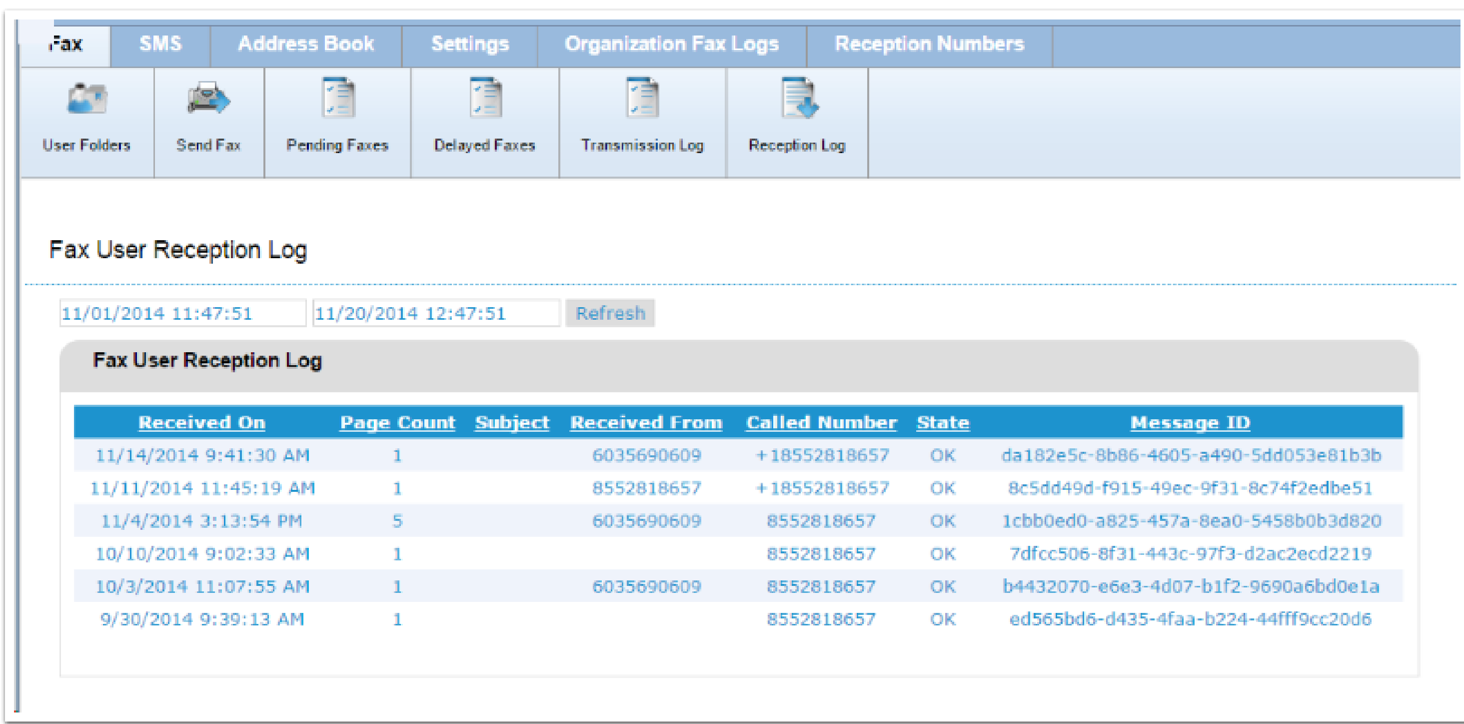
Free Field 2: Indicates the information entered in this field when creating the fax.

Fax tab - Reception log

The Reception log shows the history of faxes received for the logged in client. It is possible to show the

reception records for the last day, last week, last two weeks, last month, last three months or all reception

records.



Received on: Indicates the date/time the fax was received.

Page count: Indicates the number of pages received.

Subject: Indicates the subject as set by the administrator when configuring fax forwarding.

Received from: Indicates the CSID of the fax sender.

State: Indicates the sate of the reception, if OK, the fax was received correctly without missing pages.

Message ID: This is an internal application code which can be used to trace the message.

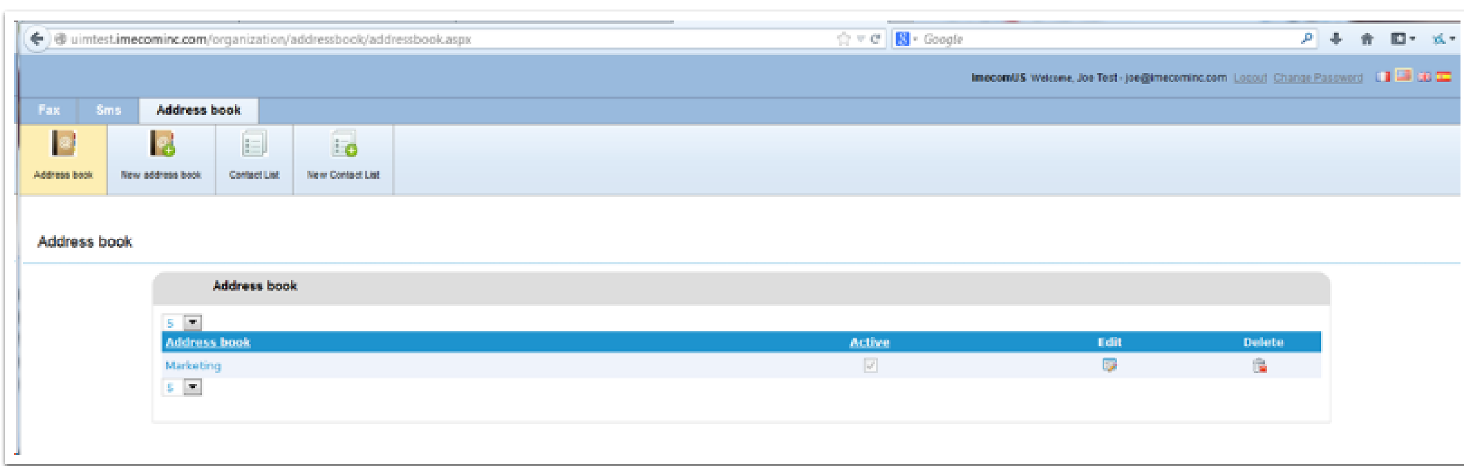
Address book tab – Address book

The main Address Book page allows you to view, create or modify address books as well as your contact

lists.

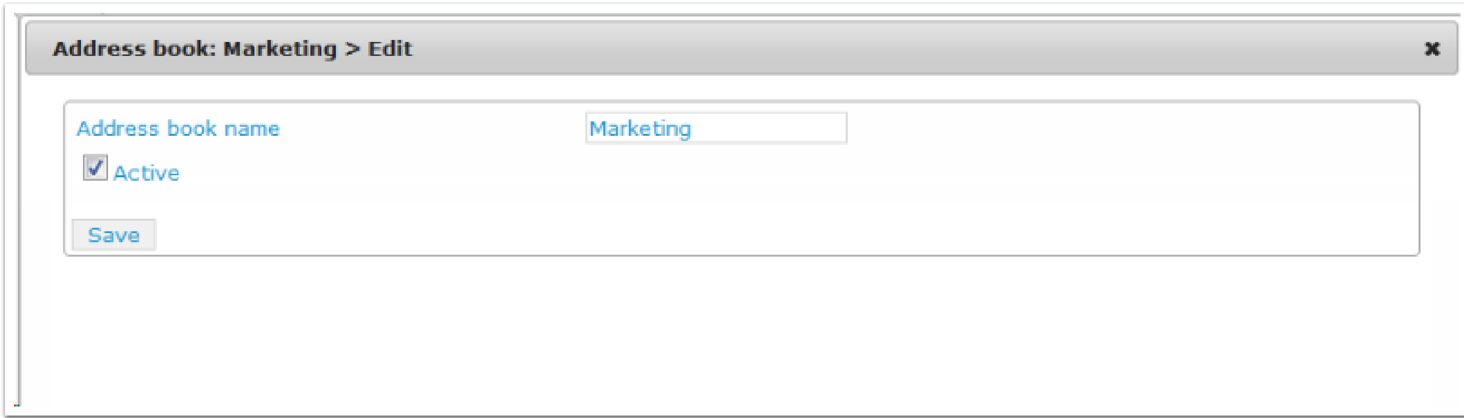
The list of Address books can be seen by clicking on the Address Book button under the Address book tab.

The below example shows the previously created Address book named Marketing.



You can make the Address book Active or Inactive by checking/unchecking the Active block after selecting

the Edit function from the previous window:



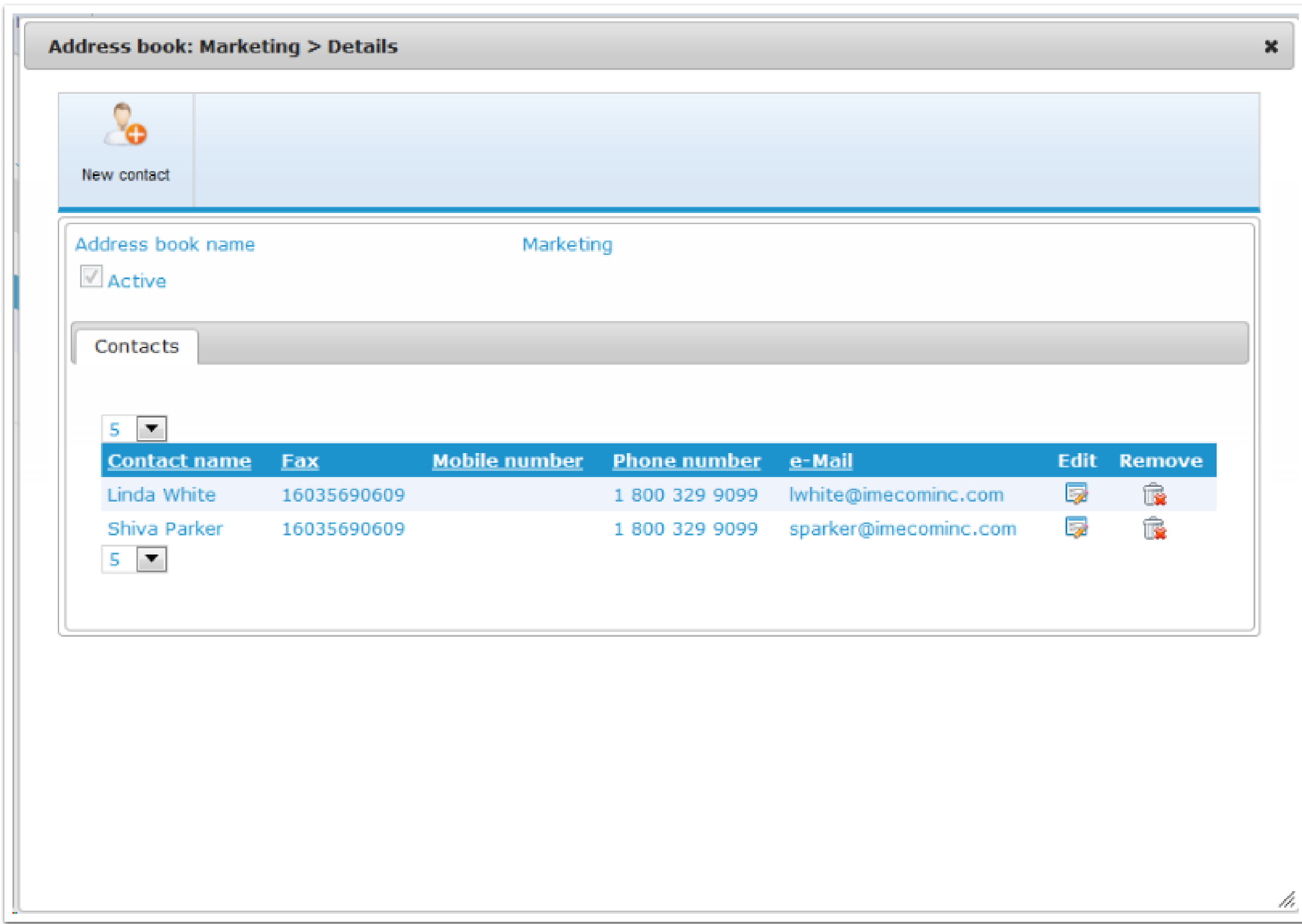
Address book name: Enter the desired name for the Address book in this field.

- Select or de-select the Active block and then click on Save to save your changes.

By double clicking on the Address book name in the main Address book window, the properties window

appears. The options in this view are to add a New contact, Edit an existing contact or Remove an existing

contact.



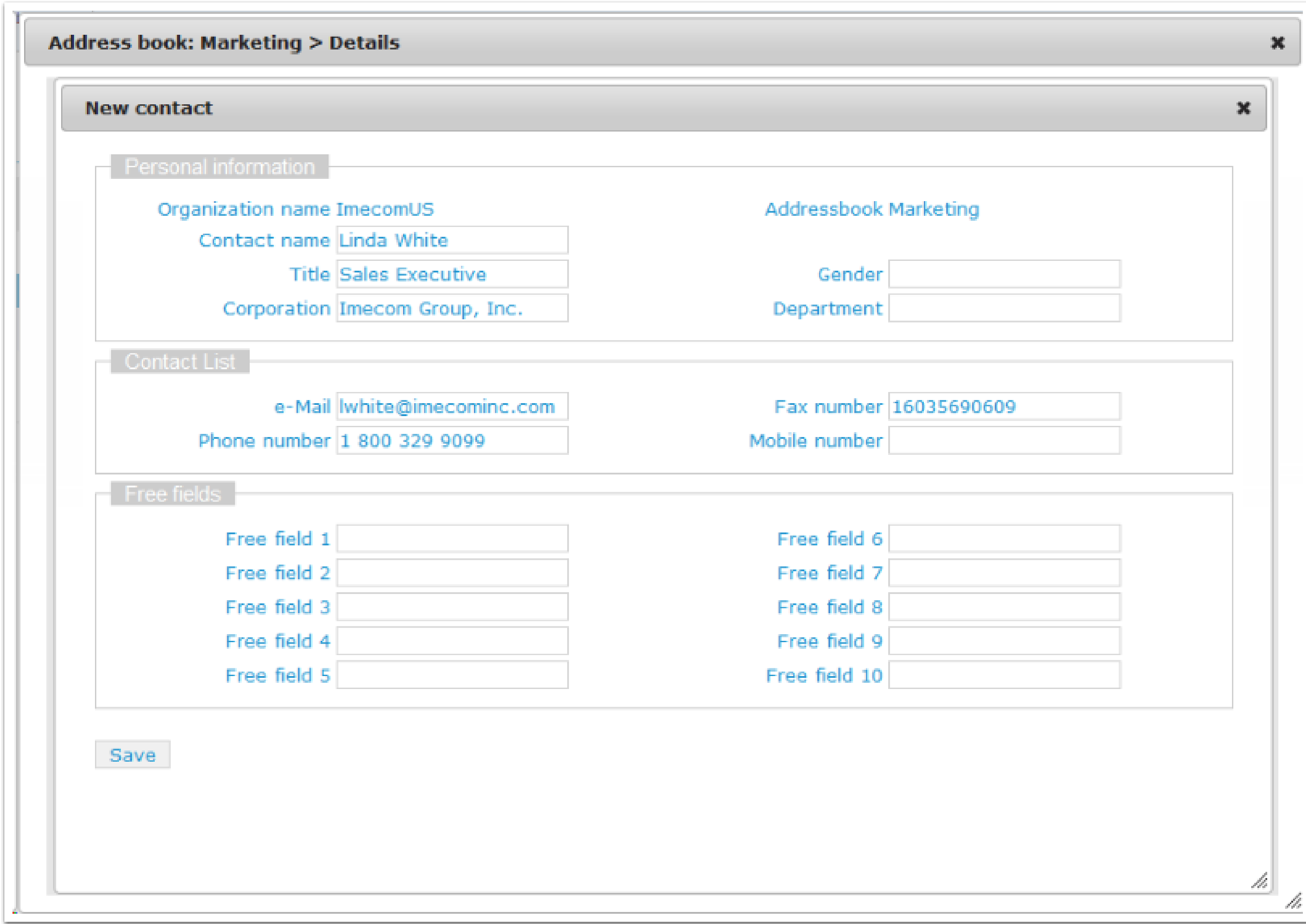
The List of Contacts in the Address book is shown in this window, The contact name, the Fax number,

Mobile number, Phone number, and e-Mail address are displayed.

In this view you can select to show 5, 10 or 15 lines.

Properties of an address book contact

The properties page for a New contact in an address book is composed of three sections:



- Personal information

Organization name: Indicates the UIM organization name of the contact and address book. This field is not editable.

Contact name: Indicates the name of the contact.

Title: Indicates the contacts title.

Corporation: Indicates the company name of the contact.

Gender: Indicates the gender title of the contact, Mr, Mrs, Miss, etc.

Department: Indicates the department name of the contact.

- Contact List

e-mail: Indicates the email address of the contact.

Phone number: Indicates the phone number (business phone) of the contact.

Fax number: Indicates the fax number of the contact.

Mobile number: Indicates the mobile number of the contact.

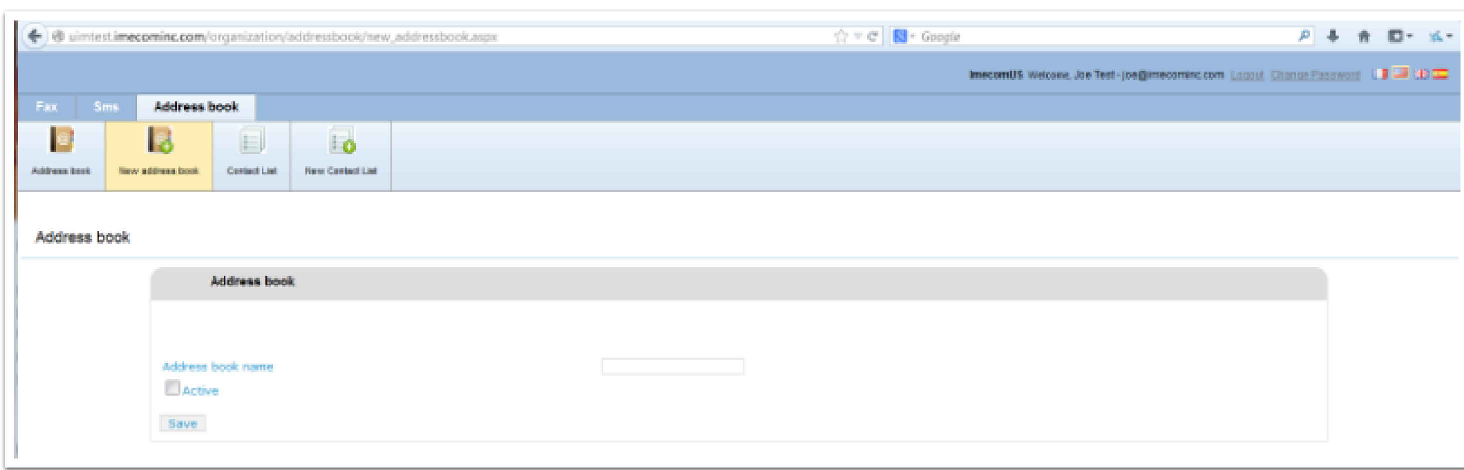
- Free fields 1 thru 10: These fields can be used to hold information specific to this contact (Business ID,

client #, invoicing code…).

Save: Click on this button to save the information entered for this contact.

Address book tab – New address book

To create a new address book click on the New Address book button under the Address book tab.



Address book name: Use this field to enter the desired name for the new address book.

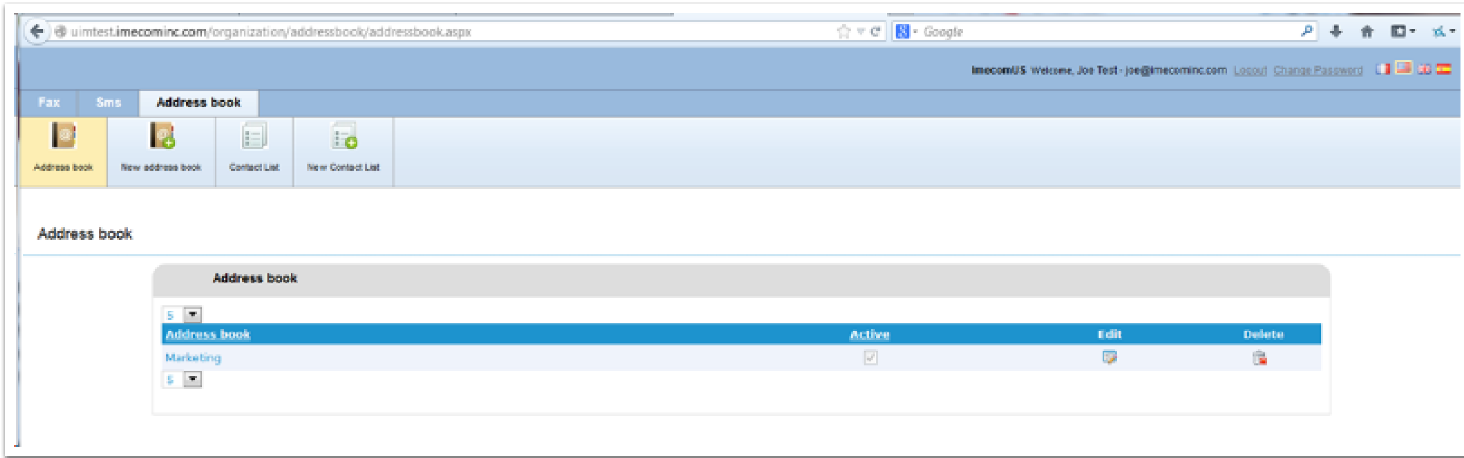
Active: If this block is checked the address book is active and can be accessed when creating a fax request.

Save: Use this button to save your new address book.

Once the new address book has been created it can be accessed from the Address book button under the

Address book tab. From here you can add contacts to the address book as shown in the previous section,

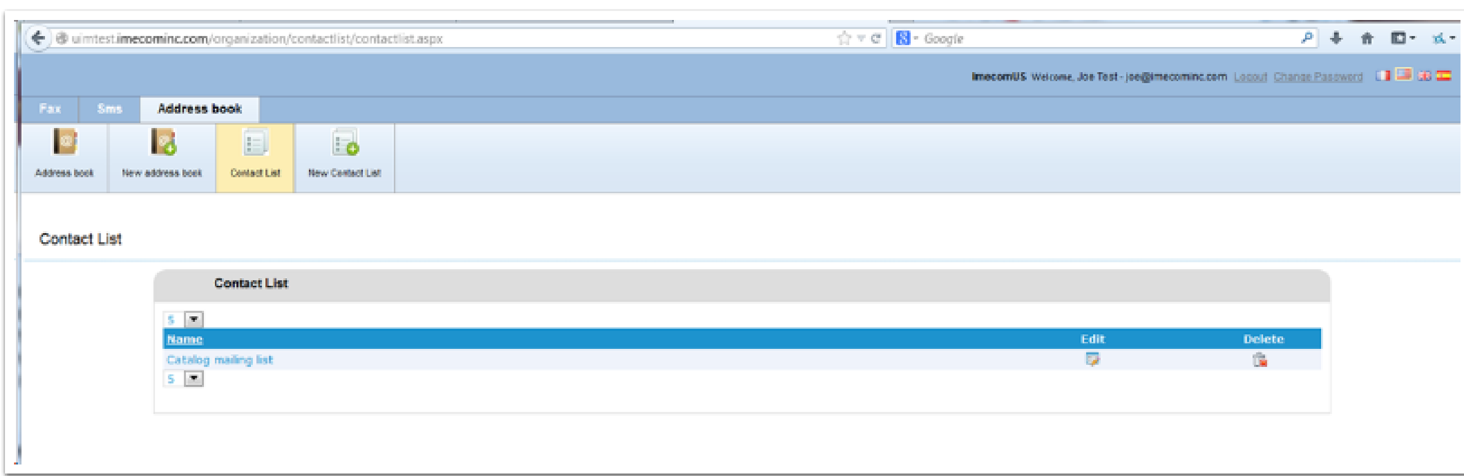
« Properties of an Address book contact ».



Address book tab – Contact List

Existing contact lists can be viewed by clicking on the Contact List button under the Address book tab. In

the example below, an existing contact list named Catalog mailing list is shown.



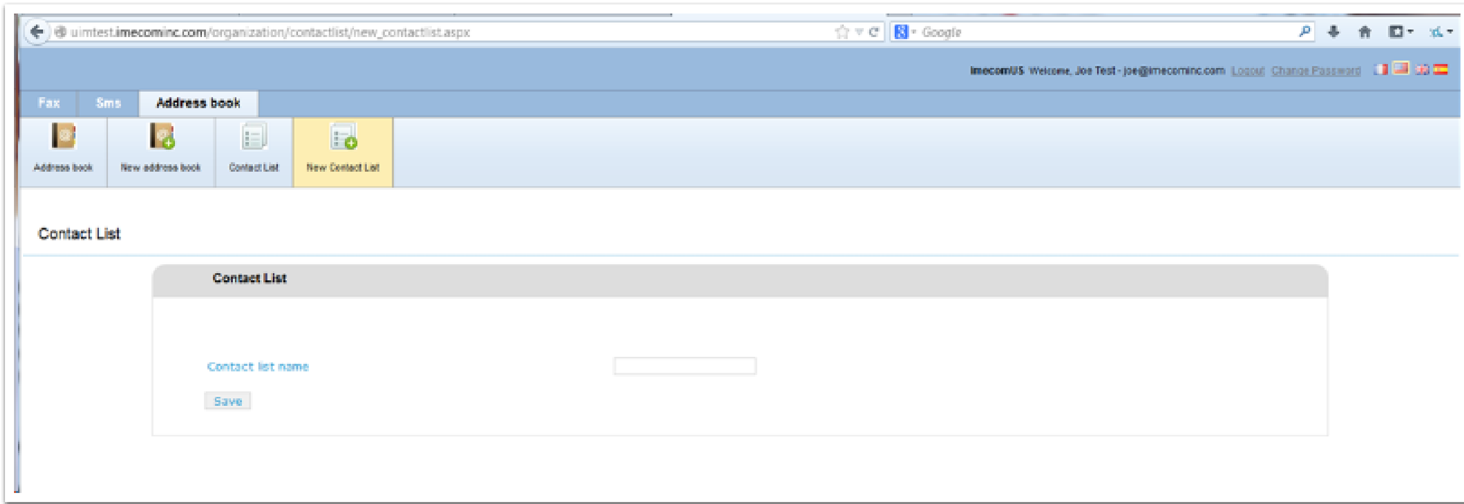
The information shown on the Contact List page is the following, name of the contact list(s) along with the

Edit and Delete selectable icons.

This view can be set to show 5, 10 or 15 lines.

Address book tab – New Contact List

The creation of a new contact list is accomplished from the New Contact List button under the Address book tab. Contact lists may contain members of the organization, entries from any address book or any combination of these.



Contact list name: Enter the desired name for the contact list in this field.

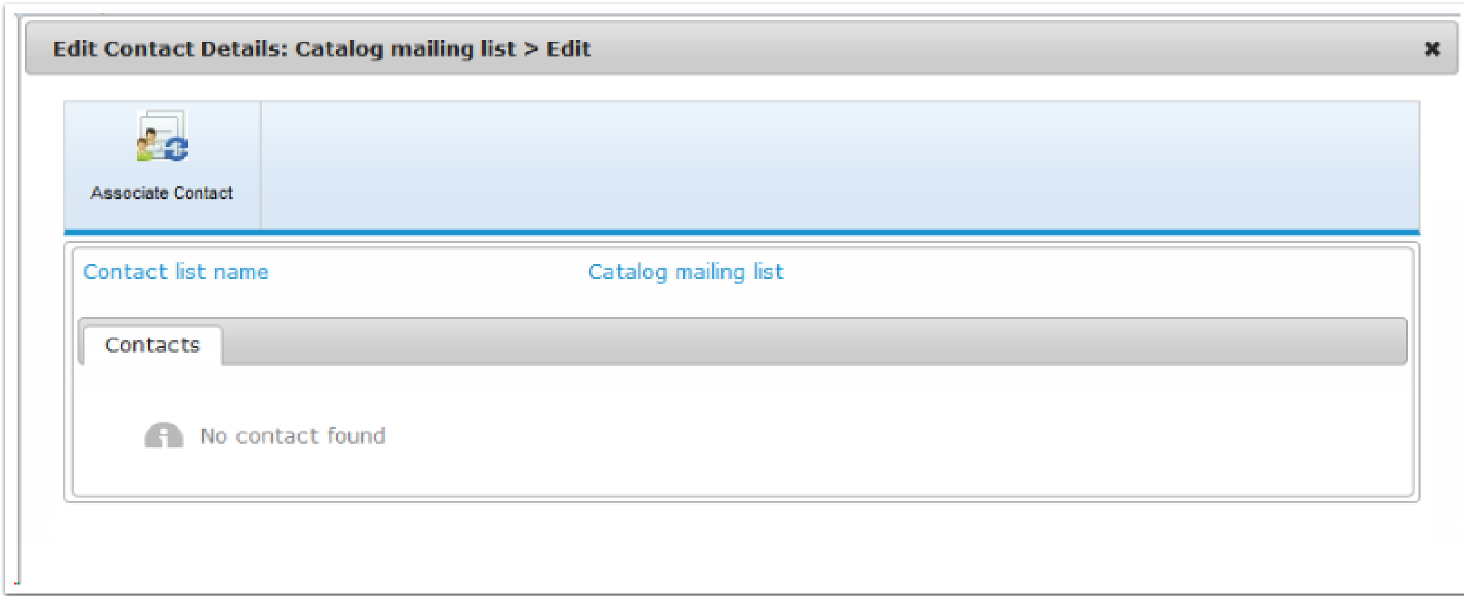
Save: Click on this button to save the new contact list.

Once the new contact list has been created it can be accessed via the Contact List button where new entries can be added by simply double clicking on the list.

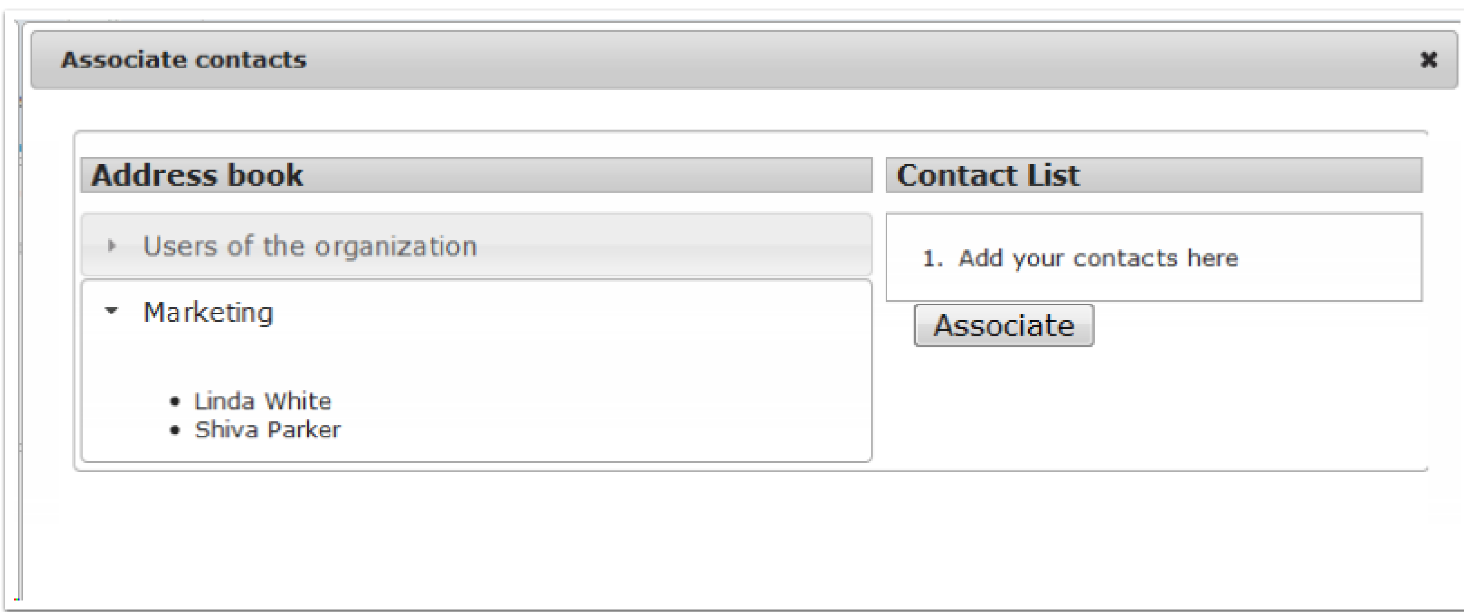
Address book tab – Adding a contact to a Contact List

The population of a new contact list is accomplished from the Contact List button under the Address book

tab. Click on the contact list to which you would like to add entries to.



Next, click on the Associate Contact button.



Adding entries to the Contact List is a drag & drop operation. Simply drag the contact you want over to the

Add your contact here block. You may add as many entries as you wish. Then click on the Associate

button to add these entries to the Contact List.

Contacts may be removed from a Contact List only after they are added. They cannot be dragged back

from the Add your contacts here box. Remove them by clicking on the Delete icon next to the entry to be

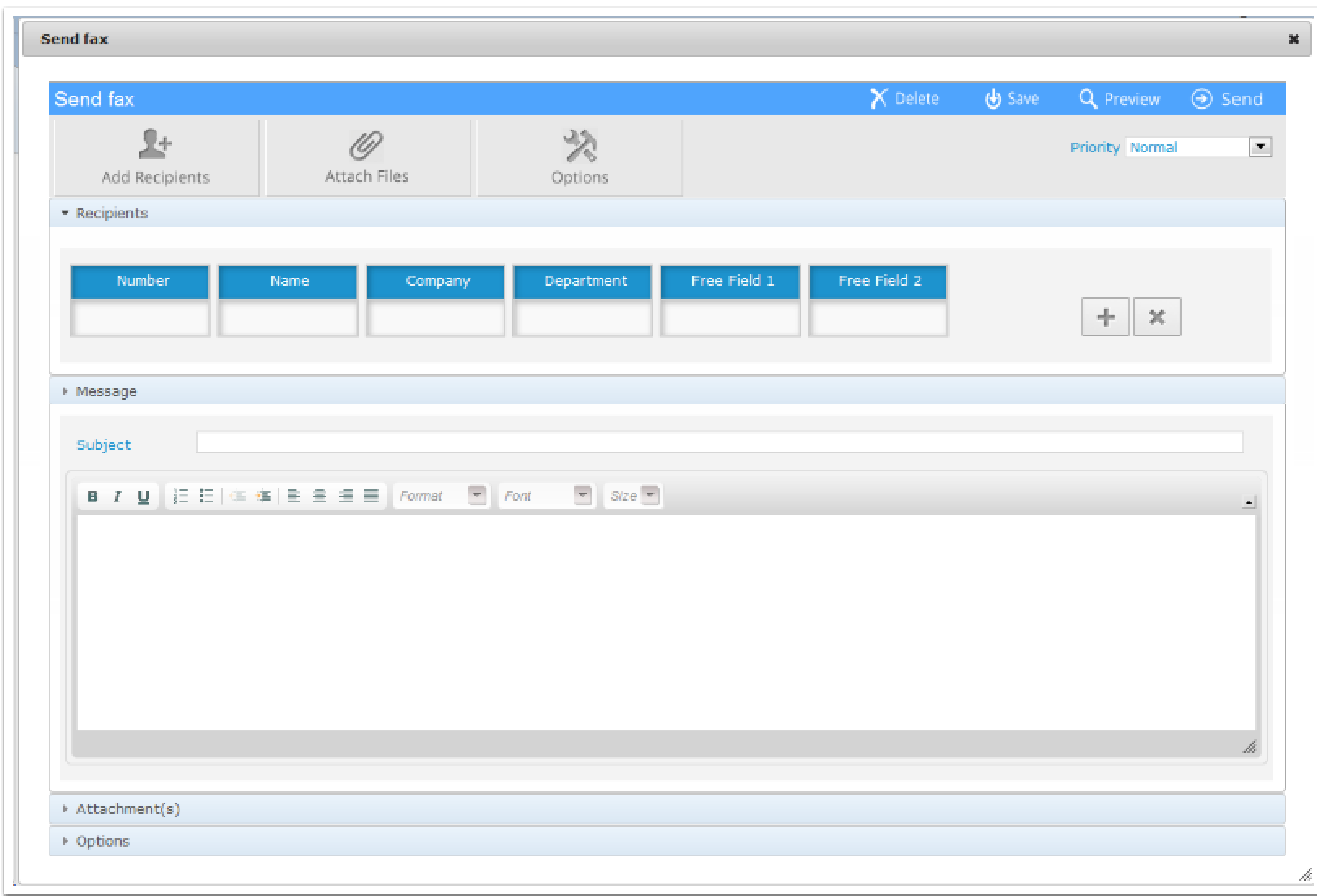
removed.

The display showing the contacts in a Contact List can be set to show 5, 10, or 15 lines.

Sending a fax

From the Welcome page which is displayed when first logging into the UIM user console, clicking on the

Send fax button displays the following dialog box:



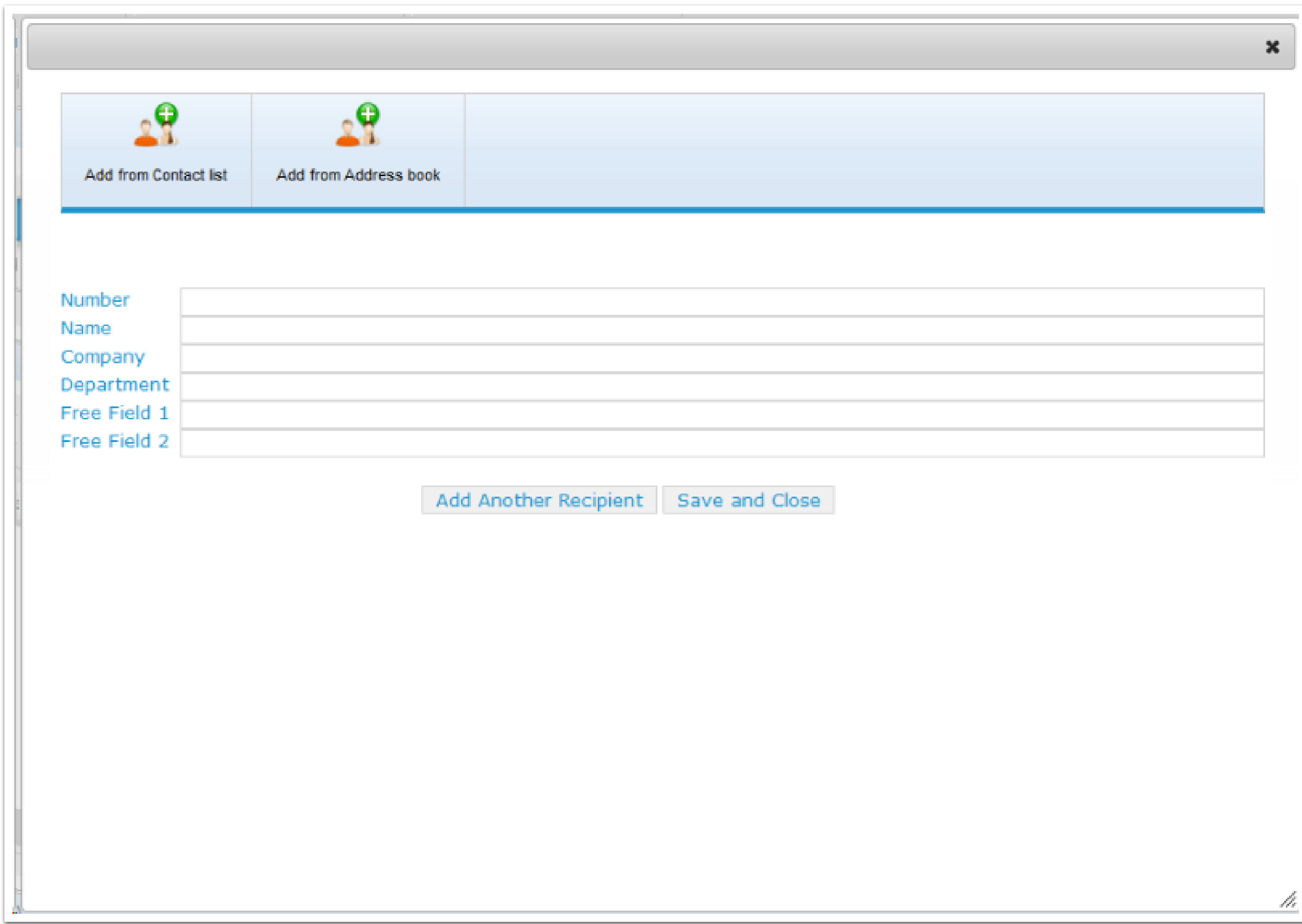
- In the Recipients section, enter in the information requested in each field. Only the Number field is required, the remaining fields are optional. Only digits and the + sign may be used in the Number field, no dashes, parenthesis or spaces are allowed.

Click on the + button to add the entry to the Recipients list. You may add additional fax recipients in the same manner. Clicking on the X button will clear the fields.

In addition to the above method, recipients may be added from a Contact List or Address book by clicking on the Add Recipients button.

Adding recipients using the Add Recipients button

- Click on the Add Recipients button, the following window appears:



- Enter the information in the respective fields:

Number: Fax number of the recipient - (required).

Name: Name of the fax recipient - (optional).

Company: Company name of the recipient - (optional).

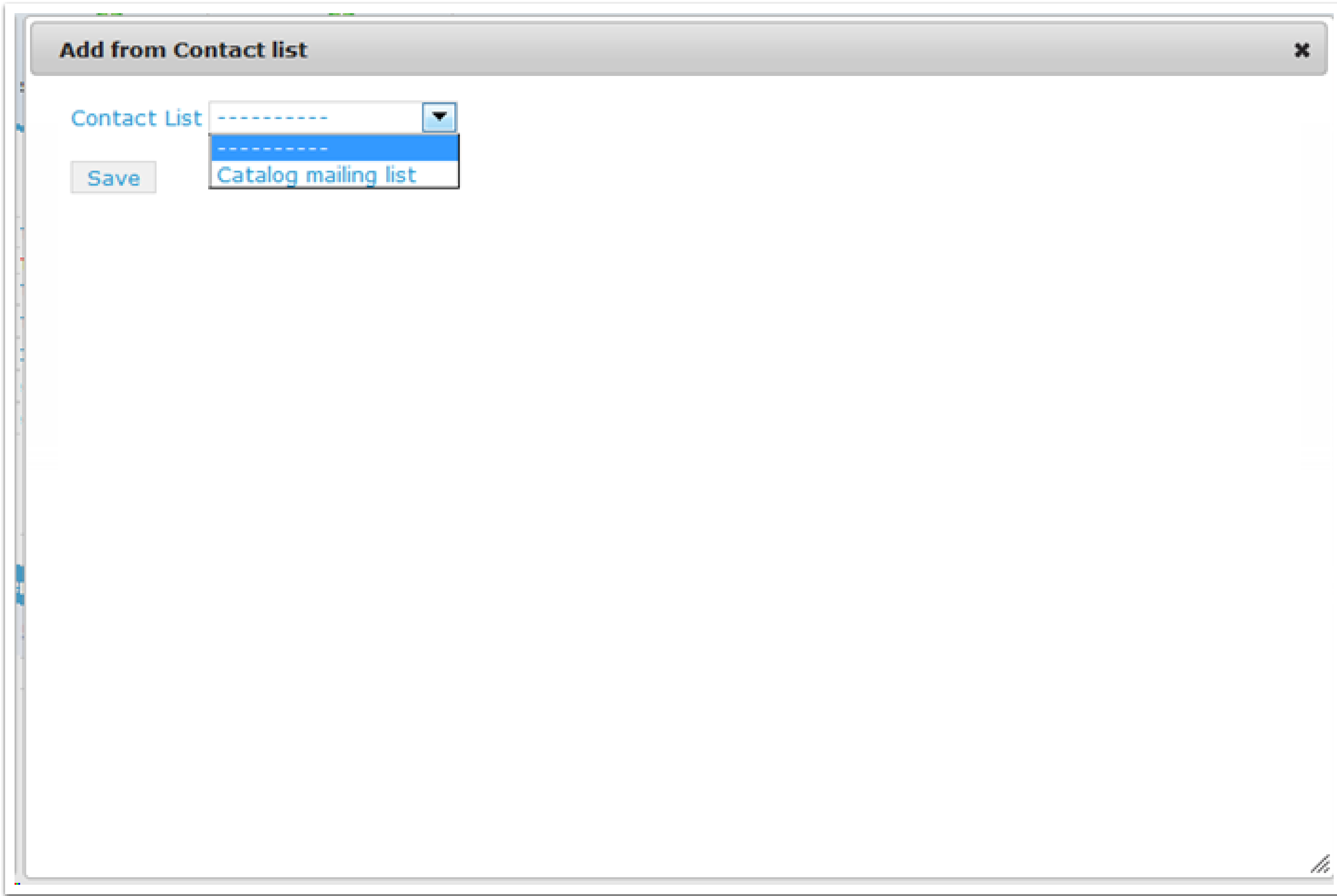
Department: Department name of the recipient - (optional).

Free field 1: These fields can be used to hold information specific to this contact (Business ID, client #, invoicing code…). This information can be used by an archiving system to sort faxes. (Optional field).

Free field 2: These fields can be used to hold information specific to this contact (Business ID, client #, invoicing code…). This information can be used by an archiving system to sort faxes. (Optional field).

Adding a recipient from a Contact List or Address book

- From the dialog box shown on the previous page, click on the Add from Contact list button



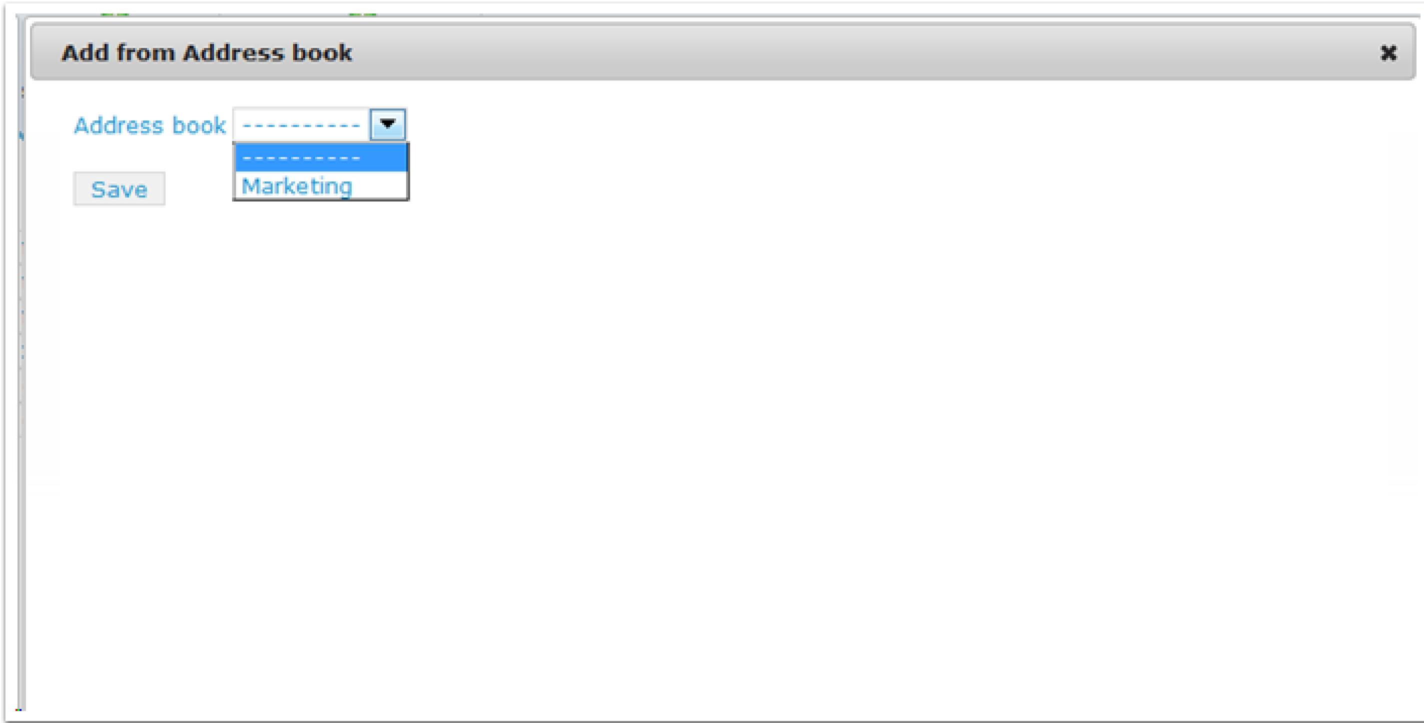
- From the Contact List drop-down menu, select the desired list (which will then display the

members of that list). By default, all entries are selected, deselect as desired.

- Click on the Save button to enter your selections in the main Recipients list.

Alternatively,

- Click on the Add from Address book button.



- From the Address book drop-down menu, select the desired address book.
- Check the selection box next to the entries you would like to add and then click on the Save button.

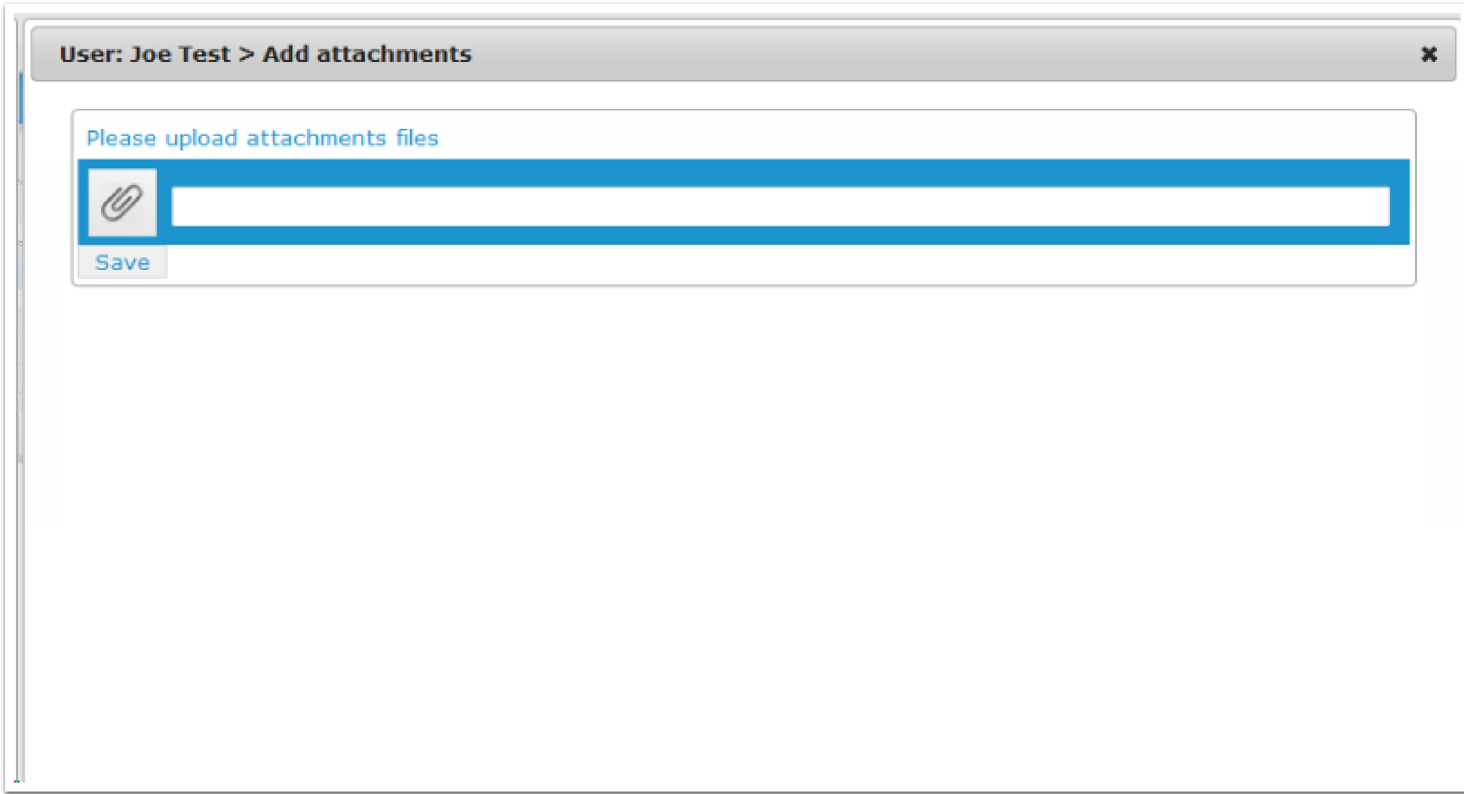
Back on the main Send fax page complete the Message section by entering the desired information into the Subject and Message body fields.

If you would like to attach documents to the fax request, you mau use either of the two procedures described below:

- Click on the Attach Files button, A dialog box appears that will allow you to browse to the document desired.
- Select the file to attach and then click on the Open button, the name of the document will appear in the attachment window. Click on the Save button to complete the operation.

Alternatively,

- Open the Attachment(s) section and click on the paper clip button, the same Add attachments dialog box will appear:



- Use the same procedure as described above to attach your document(s).

It is possible to preview your fax request before transmission, click on the Preview button along the top right menu bar. Your fax request will now appear in the Drafts folder.

- You must click on the Drafts entry under User folders to refresh the view, the PDF is generated.
- Click on the Adobe icon for the draft to download or open the fax for preview.

To send the fax, click on the Send button on the main Send fax page.