

RIGHTFAX

TRAINING MANUAL

JUNE 2020

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Introduction to RightFax



The RightFax system is a network solution for creating, sending, receiving, and managing faxes from your desktop computer. Users can retrieve incoming faxes directly from the RightFax system.



This manual covers information about RightFax within Outlook and RightFax Connect Utility.



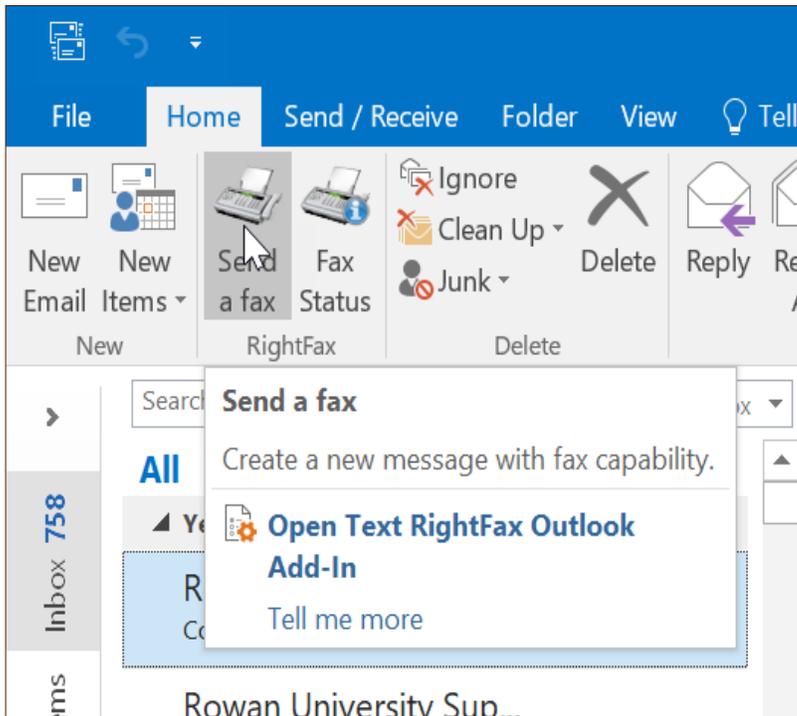
Objectives

By the end of this manual the user will be able to:

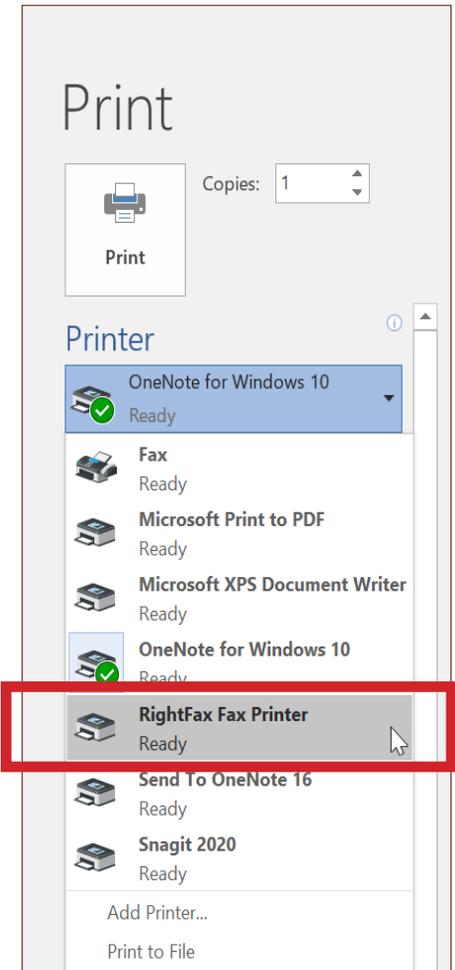
1. Access Rightfax
2. Receive a fax from Email
3. Access RightFax Connect Utility
4. Receive a fax from RightFax Connect Utility
5. Search for a fax in RightFax Connect Utility
6. Send out a fax in RightFax Connect Utility
7. Send out a fax through Outlook
8. Fax from a Microsoft Office Menu
9. Fax from the Task Bar Tray
10. Use Help Options

ACCESSING RIGHTFAX

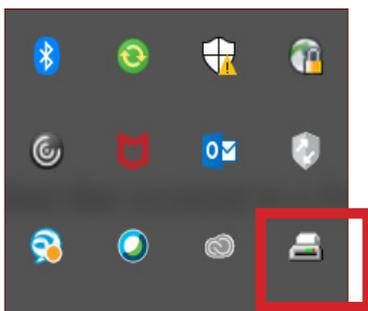
There are multiple ways to access the RightFax software. Incoming and outgoing faxes can be accessed by email and through the RightFax Connect Utility application. There is a link to RightFax in your system tray area in your task bar. Outgoing faxes can be sent using the print menu in your existing office program.



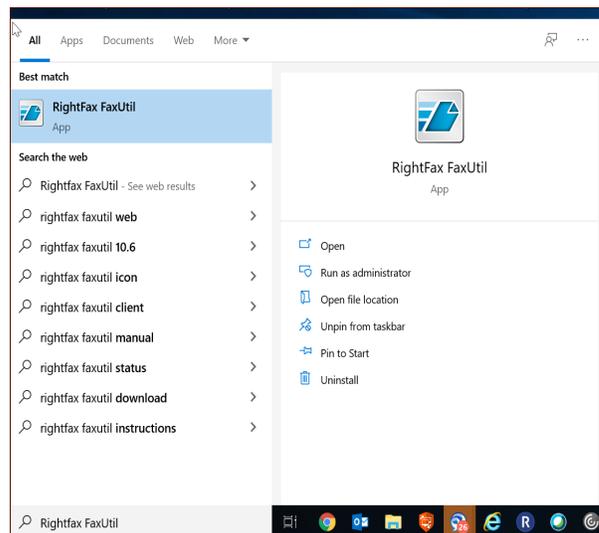
OUTBOUND FAX VIA EMAIL



OUTBOUND FAX VIA MICROSOFT OFFICE



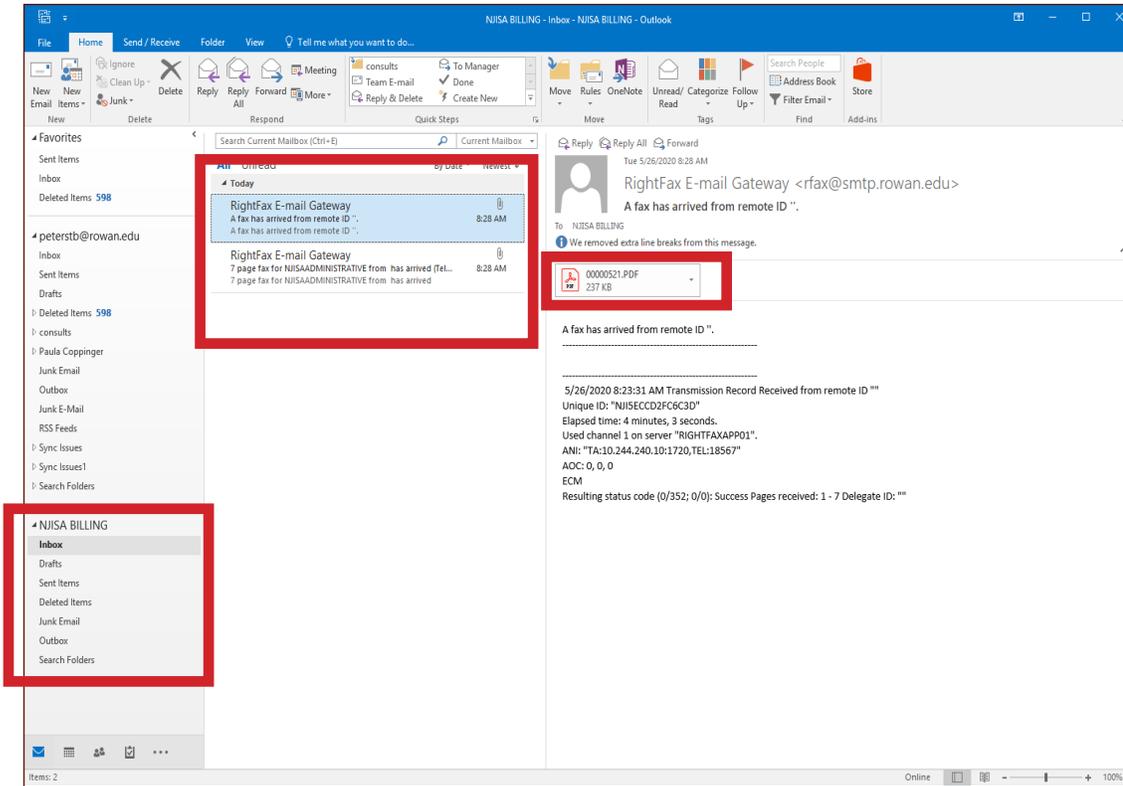
RIGHTFAX IN SYSTEM TRAY



RIGHTFAX CONNECT UTILITY

INCOMING FAXES VIA EMAIL

When a fax has been received by RightFax, a notification should appear in the designated email inbox.



INBOUND FAX VIA EMAIL

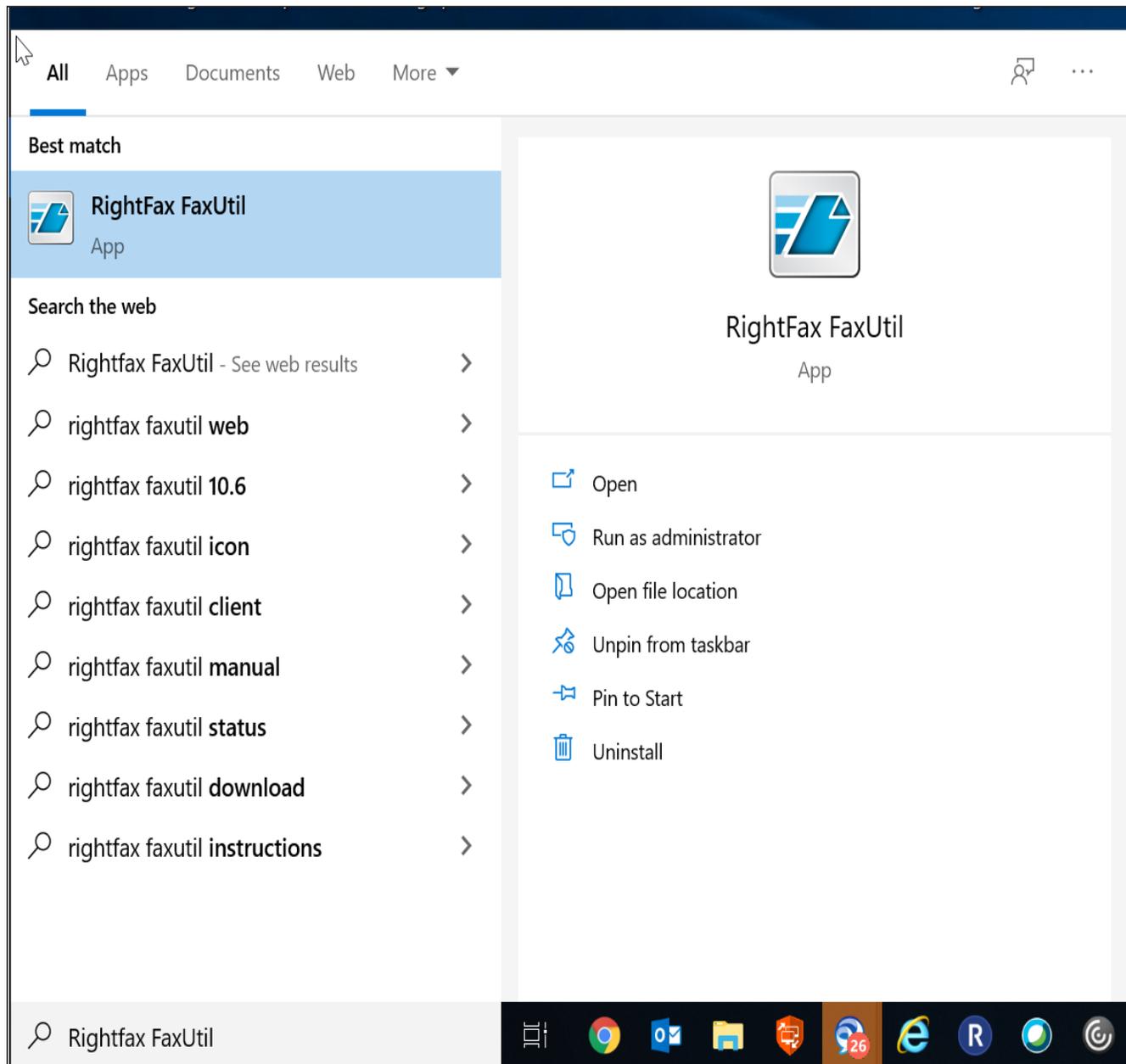
Incoming faxes can be found in your inbox by selecting the designated email inbox for RightFax in Outlook. Follow these steps to view inbound faxes in Outlook:

1. Select the inbox or folder that has been established for RightFax incoming faxes.
2. Select the email notification to see fax details.
3. If the fax is able to be retrieved from the email notification, or as an attachment, open the fax from the email. For the example above, the fax has been sent in PDF format and can be opened the same way a standard email with a PDF attached can.
4. If you cannot access the fax directly from the email notification, open the RightFax Connect Utility to access your fax.

If you need to have an inbox created for this step, or have a fax line converted to RightFax, please contact Rowan Support at support.rowan.edu or 856-256-4400.

RIGHTFAX CONNECT UTILITY

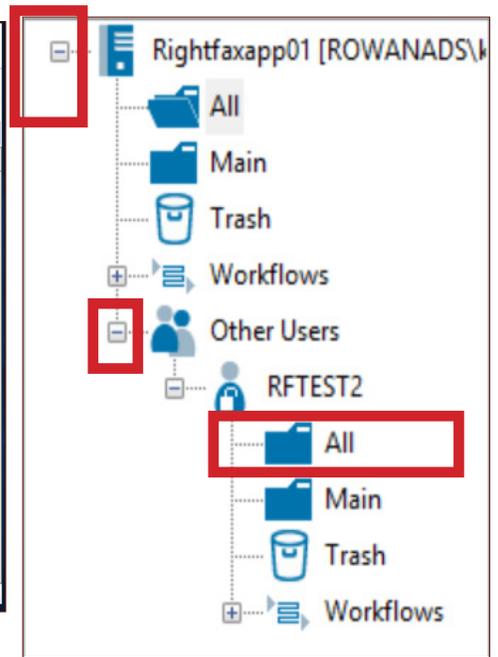
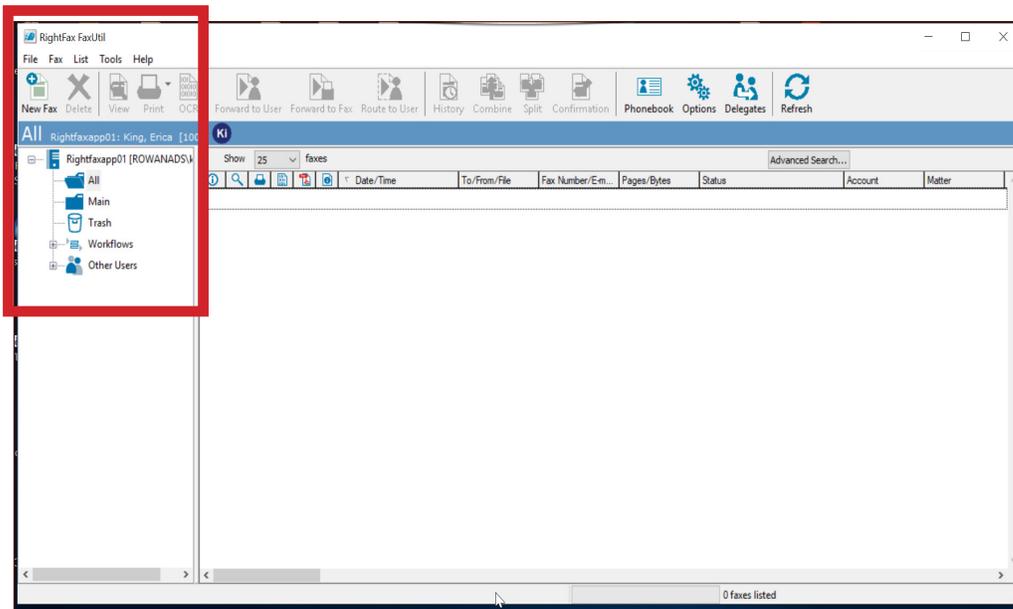
In the RightFax Connect Utility application, incoming faxes can be accessed and viewed. If a fax has been received via email but the email was deleted, the fax can still be accessed via the RightFax Connect Utility application. In addition, faxes can be sent through the RightFax Connect Utility.



RIGHTFAX CONNECT UTILITY HOME SCREEN

Open RightFax Connect Utility on your computer through either the start menu, desktop shortcut, the task bar, or applications folder.

INBOUND FAXES IN RFC UTILITY



INBOUND FAXES VIA RIGHTFAX UTILITY

Inbound faxes can be accessed in the utility program by selecting the designated location within the application. Follow these steps to view inbound faxes in RightFax Connect Utility:

1. Select the **All** folder to see the current faxes.
2. If the **All** folder is not visible, select the **+** sign next to the user folder. The **All** folder should now be visible.
3. To open the fax, double-click on the fax title.
4. To make the fax appear darker, select the **Tools** menu, select **Gray Scale**, then select **16 Shades**.
5. You can now **Print**, **Email**, or **Save** the fax. These options are found in the **File** menu.

RFC UTILITY

In the RightFax Connect Utility application faxes can be sorted, viewed, and searched.

Show 25		faxes				Date/Time	To/From/File	Fax Number/E-m...	Pages/Bytes	Status
1	2	3	4	5	6	7	7	7	7	7

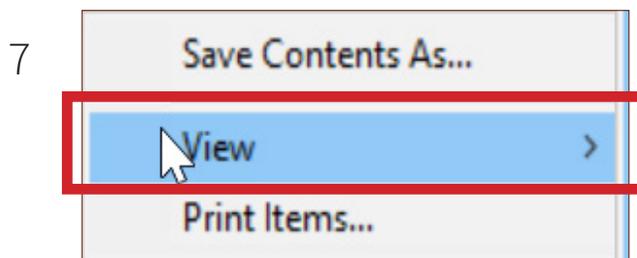
Fax categories 1 - 6:

Fax flags: = sent, = received, = printed, = converted to text (OCR), = converted to PDF, or sent or received fax forwarded to another RightFax user. In addition, flags can indicate the document type: = certified delivery message, = SMS message, = Emailed, = Fax routed to email.

Status indicators: = preparing for transmission, = transmitted, = not transmitted due to error; will be retried, = not transmitted due to error; will not be retried.

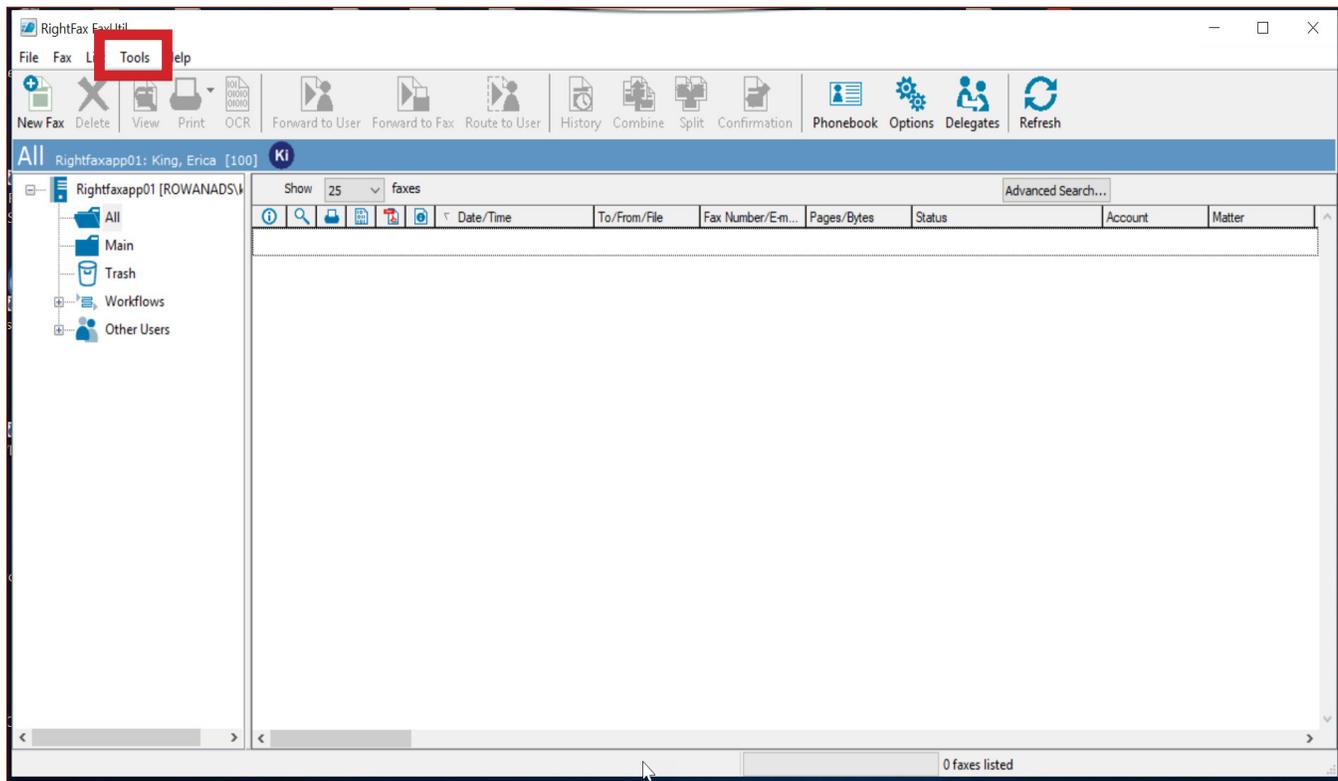
1. Indicates if the document was sent or received. Inbound faxes are shown with a yellow down arrow and outbound faxes are shown with a green up arrow.
2. Indicates if the document was viewed.
3. Indicates if the document was printed.
4. Indicates if the document was OCR'd.
5. Indicates if the document has a PDF attached.
6. Indicates if the document is Certified, Secure, or Email.
7. The categories listed below can be used to sort faxes using specific criteria. To change the criteria, right click on the category and select a different option listed. To see more options, select the triangle at the end of the list.

- Indicates whether this document was sent or received
- Indicates whether or not this document has been viewed
- Indicates whether or not this document has been printed
- Indicates whether or not this document has been OCR'd
- Indicates whether or not this document has a PDF
- Indicates type of document (Certified, Secure or E-mail)
- Date/Time
- To/From/File
- Fax Number/E-mail/ID
- Pages/Bytes
- Status
- Billing Data 1
- Billing Data 2
- Unique ID
- Owner
- Comment
- Folder
- Handle (hex)
- Number of TX/RX Records
- Binary File Attachment Bytes
- Folder ID
- Last History Change
- Gateway Fax
- Has TX/RX Notes
- Requesting a PDF
- Data for newer versions
- Company
- Message from Transport
- DID / DNIS
- Completion Time



The Fax Flags image is owned by RightFax.

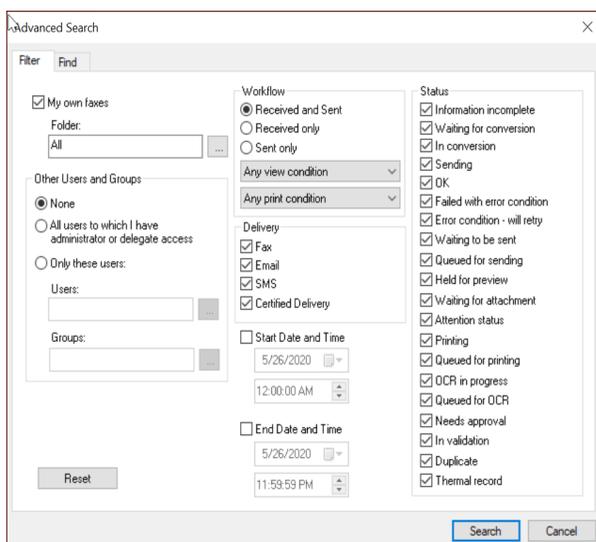
RFC UTILITY SEARCH



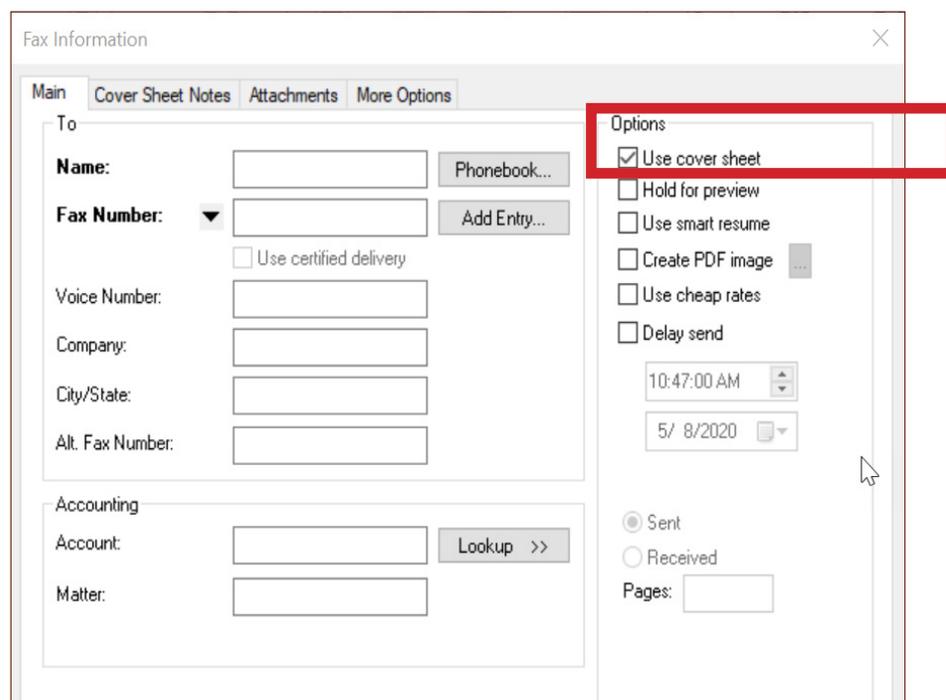
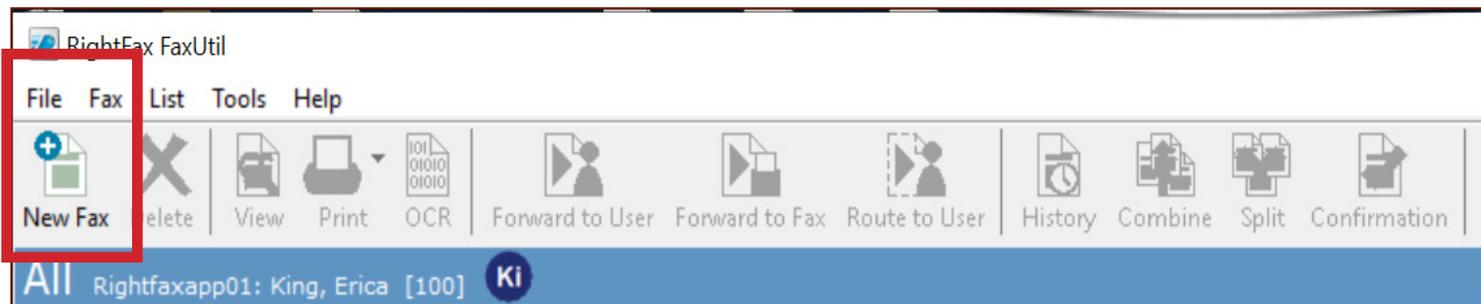
UTILITY SEARCH OPTIONS

If you have trouble locating a fax, you can search for the fax in the RightFax Connect Utility.

1. In RightFax Connect Utility select the **Tools** menu, then the **Search** option.
2. Or you can hold down the control key on the keyboard (command key for a mac), and tap the F key. This will bring up the same search bar in the RightFax Connect Utility.
3. A search box will appear and you can type in anything that might help locate the fax. This includes the sender name, office name, title of the fax, or other identifying information. Any faxes that meet the search criteria will appear.
4. There is also an **Advanced Search** option on the home screen. This is another way to do an extensive search using a combination of criteria you set.



OUTGOING FAXES IN RFC UTILITY

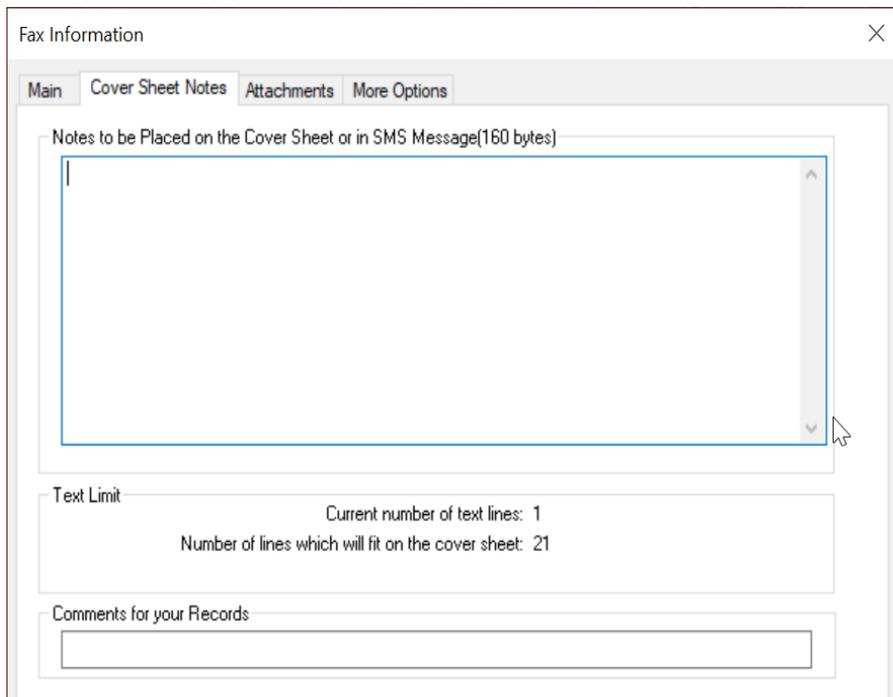


FAX A DOCUMENT FROM RIGHTFAX CONNECT UTILITY

You can fax a document from RightFax Connect Utility, and include a cover sheet.

1. In RightFax Connect Utility select the New Fax button or under the **File** menu on the left corner of the window, select the **New Fax** option.
2. Enter the outgoing fax number into the prompt and any important information in the corresponding fields.
3. If you are using a cover sheet, make sure the **Use Cover Sheet** box is checked.
4. If you would like the fax held for preview before it is sent, check the box **Hold for preview**. If the fax is held, you will need to right-click on the fax and select **Status** and then **Release** to send the fax when you are ready.

OUTGOING FAXES IN RFC UTILITY



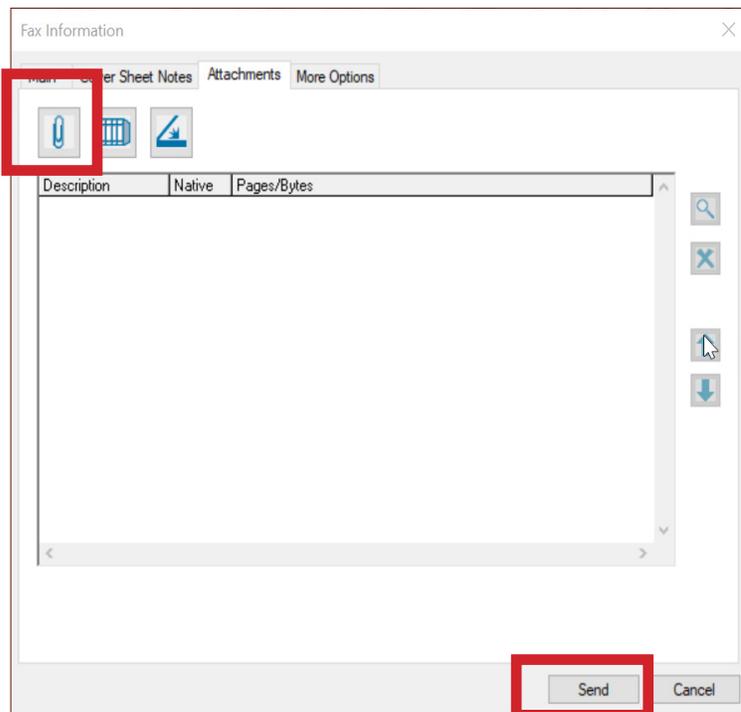
Fax Information

Main Cover Sheet Notes Attachments More Options

Notes to be Placed on the Cover Sheet or in SMS Message(160 bytes)

Text Limit
Current number of text lines: 1
Number of lines which will fit on the cover sheet: 21

Comments for your Records



Fax Information

Main Cover Sheet Notes Attachments More Options

Description Native Pages/Bytes

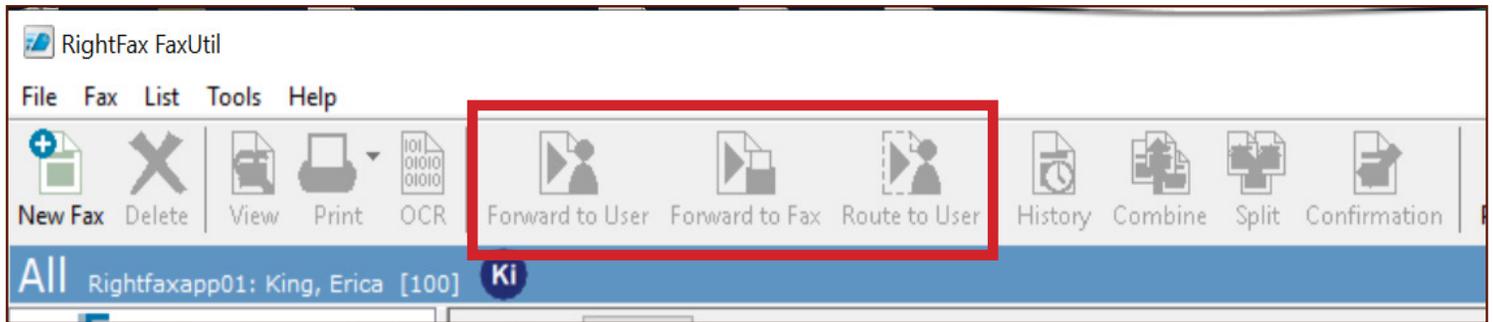
Send Cancel

COVER SHEET AND ATTACHMENTS

You can add information to the cover sheet and add attachments.

1. Add information in the Cover Sheet Notes tab that you wish to appear on the cover sheet.
2. Find the document on your computer you would like to fax using the paperclip icon in the **Attachments** tab.
3. Select **Send**.

FORWARD FAXES AND ROUTE TO USER



Fax Information

Main Cover Sheet Notes Attachments More Options

To

Name: [] Phonebook...

Fax Number: [] Add Entry...

Use certified delivery

Voice Number: []

Company: []

City/State: []

Alt. Fax Number: []

Accounting

Account: [] Lookup >>

Matter: []

Options

Use cover sheet

Hold for preview

Use smart resume

Create PDF image

Use cheap rates

Delay send

10:47:00 AM

5/ 8/2020

Sent

Received

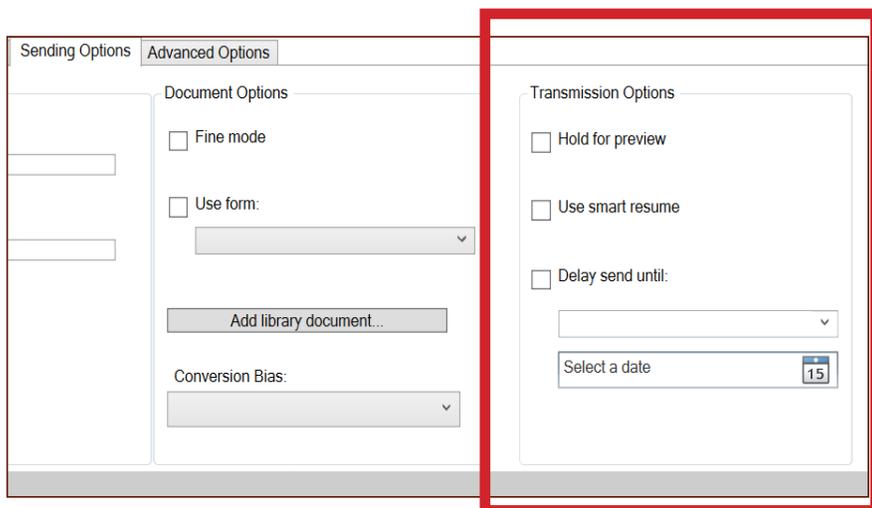
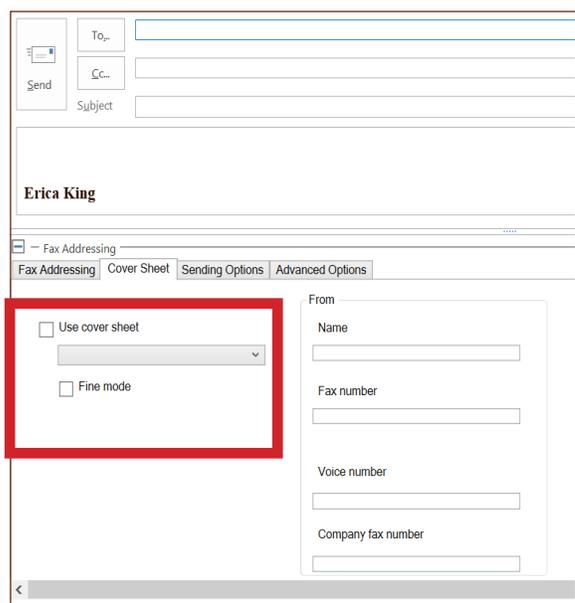
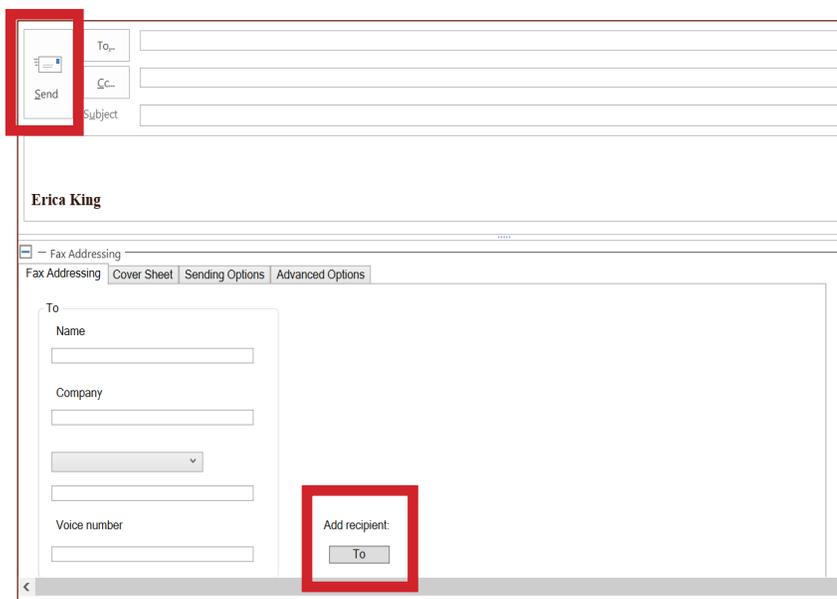
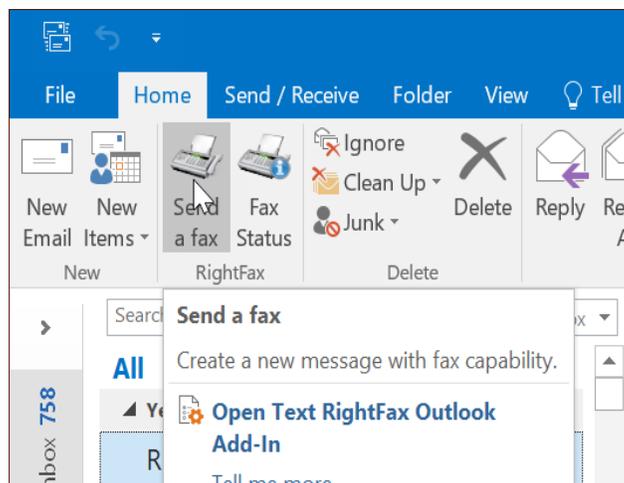
Pages: []

FORWARD OR ROUTE A FAX

You can forward and reroute a fax document from RightFax Connect Utility. Forward sends the fax to the user and keeps a copy. Route sends a copy and deletes your copy when complete.

1. In the toolbar select the **Forward to User** or **Route to User** button to send a fax to another user.
2. Enter the outgoing fax number into the prompt and any important information in the corresponding fields.
3. If you are using a cover sheet, make sure the **Use Cover Sheet** box is checked.
4. Add information in the Cover Sheet Notes tab that you wish to appear on the cover sheet.
5. Select **Send**.
6. If you are routing to another RightFax user in your network, a box will appear listing users. Find the user you would like to route the fax to, and double click on their name to select that user. If routing the fax to more than one user, keep double clicking on users until they are all added. Select **OK** to send.

OUTBOUND FAXES IN OUTLOOK

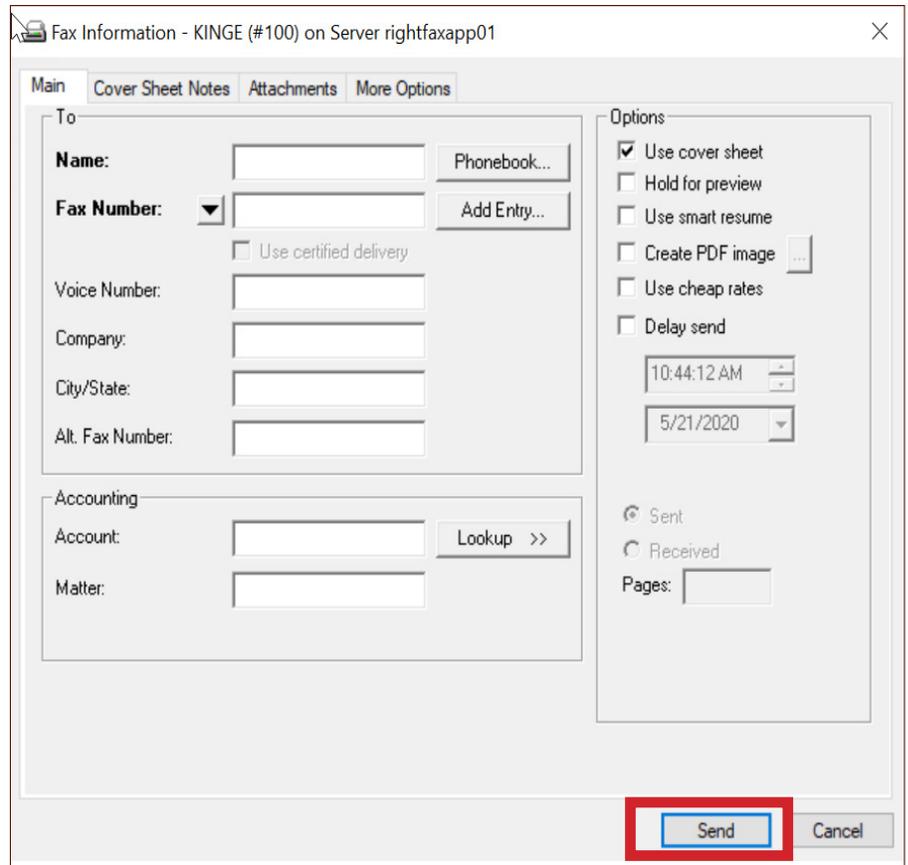
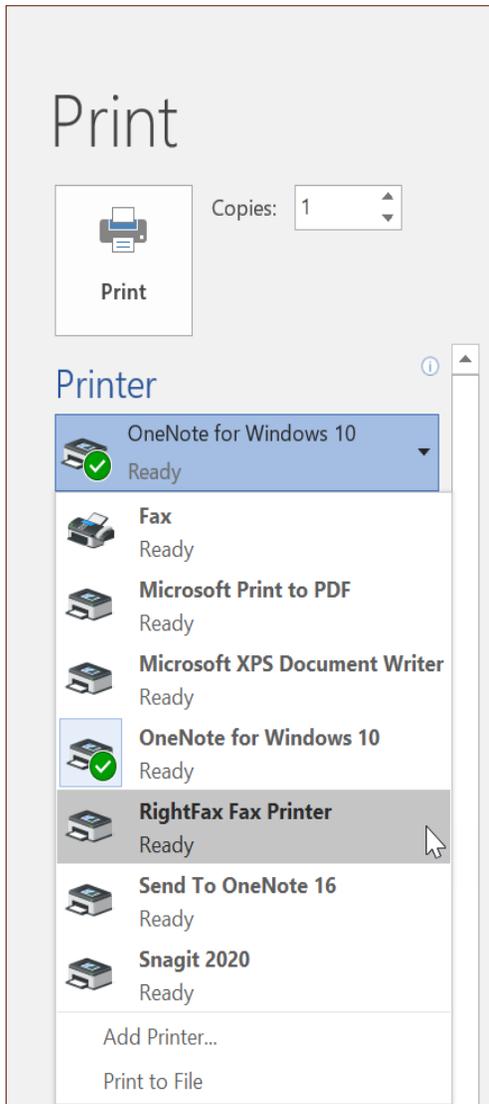


SEND A FAX FROM OUTLOOK

If you have the option installed, you can send outgoing faxes from Outlook.

1. If your document needs to be scanned prior to sending, open up your scanning program and scan your document. Save the scanned document to your computer.
2. Select **Send a Fax** from the toolbar in Outlook.
3. Enter the receiver's name and company and select the **To** button to enter the recipient in the fax addressing section of the email at the bottom.
4. Fill out the subject in the email subject field and add any attachments you would like to fax.
5. If you need a cover sheet included make sure you check the **Use Cover Sheet** box and include the information you need in the cover sheet tab.
6. Choose your sending options. **Hold for preview** will preview the message before sending. **Smart Resume** will pick up where the message left off if sending gets interrupted by network connection issues.
7. Select the **Send** button, as you would normally send an email.

OUTBOUND FAXES IN OFFICE



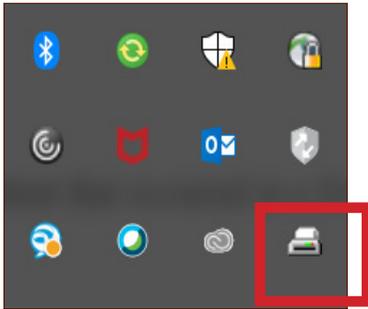
RIGHTFAX PROMPT

FAX USING PRINT

You can fax a Microsoft Office Document right from the document using the Print function.

1. After completing your document select **Print**.
2. In the Print menu choose **RightFax Fax Printer**.
3. Select **Print**.
4. Enter the outgoing fax number, name, and any important information in the corresponding fields.
5. If you are using a cover sheet, make sure the **Use Cover Sheet** box is checked.
6. Add information in the **Cover Sheet Notes** tab that you wish to appear on the cover sheet.
7. Select **Send**.

OUTBOUND FAXES USING TASK BAR ICON



TASK BAR ICON

A screenshot of the 'Fax Information - KINGE (#100) on Server rightfaxapp01' dialog box. The dialog has tabs for 'Main', 'Cover Sheet Notes', 'Attachments', and 'More Options'. The 'Main' tab is active, showing fields for 'To' (Name, Fax Number, Voice Number, Company, City/State, Alt. Fax Number) and 'Accounting' (Account, Matter). The 'Options' section on the right includes checkboxes for 'Use cover sheet', 'Hold for preview', 'Use smart resume', 'Create PDF image', 'Use cheap rates', and 'Delay send'. There are also time and date pickers, and radio buttons for 'Sent' and 'Received'. The 'Send' button at the bottom right is highlighted with a red rectangular box.

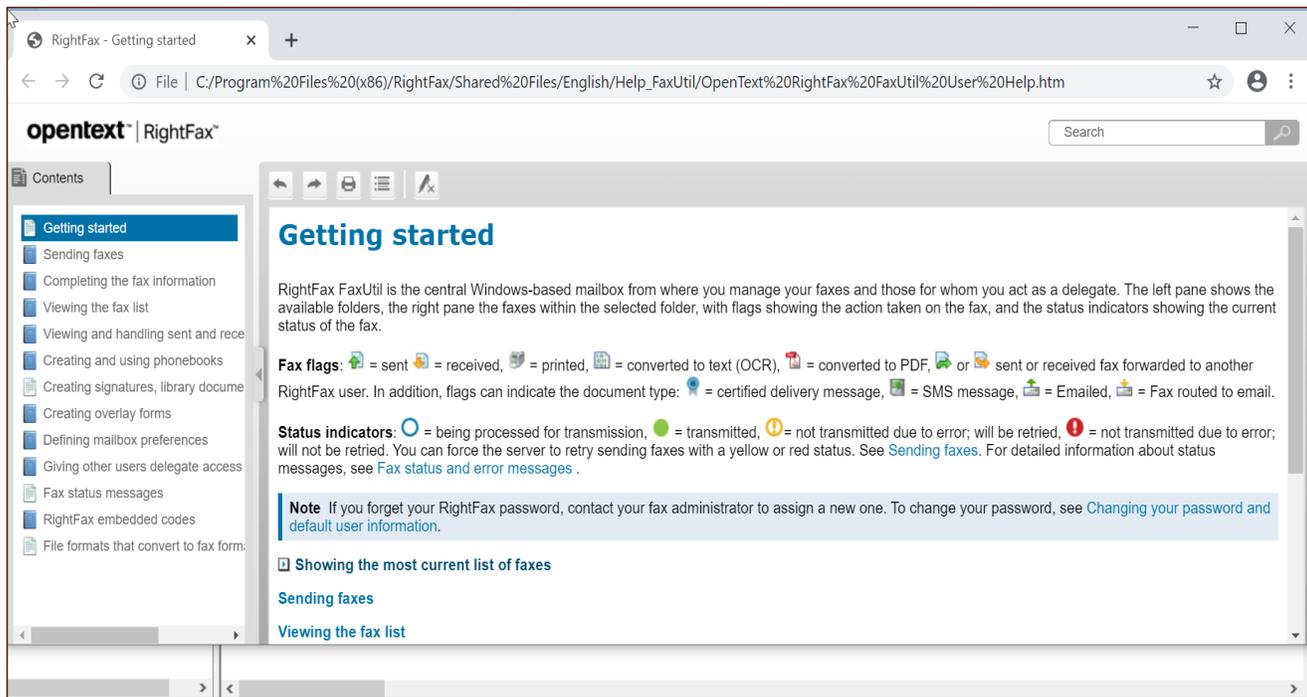
RIGHTFAX PROMPT

If your system is configured accordingly, outgoing faxes can be sent by using the RightFax icon in your system tray area in your task bar.

1. In the task bar select the RightFax icon button.
2. Enter the outgoing fax number into the prompt and any important information in the corresponding fields.
3. If you are using a cover sheet, make sure the **Use Cover Sheet** box is checked.
4. Add information in the Cover Sheet Notes tab that you wish to appear on the cover sheet.
5. Find the document on your computer in the **Attachments** tab.
6. Select **Send**.

RIGHTFAX HELP OPTIONS

If you have trouble using Rightfax, the RightFax Connect Utility has a very useful help menu.



RIGHTFAX CONNECT UTILITY HELP MENU

To get to the RightFax Connect Utility help menu, select **Help**, then **Contents**. The topics offered are listed on the left side menu. There are articles on common topics. Once you select a topic, the article appears with articles on related topics listed underneath. In addition to the help menu, OpenText, the developer of RightFax, owns The Fax Guys, an organization offering tutorial videos for the RightFax system. To get to The Fax Guys tutorials, follow these steps:

1. Go to your computer's modern internet browser.
2. Enter <https://thefaxguys.com> in the browser address bar.
3. On the website menu bar select **RightFax University**.
4. At the top of the website place your cursor over **Videos** and select a video on the topic you are looking for, or use the search box provided to you.
5. Any videos on the topic will load in a list and you can watch the video free of charge.

Support options for RightFax: If you are unable to get notifications, retrieve or send your fax from either email or the RightFax Utility application, or have any issues while accessing RightFax or the Utility Application, Contact RightFax support at 1-800-540-7292. If you are having difficulty with document management, please contact Rowan Support at support.rowan.edu or 856-256-4400.