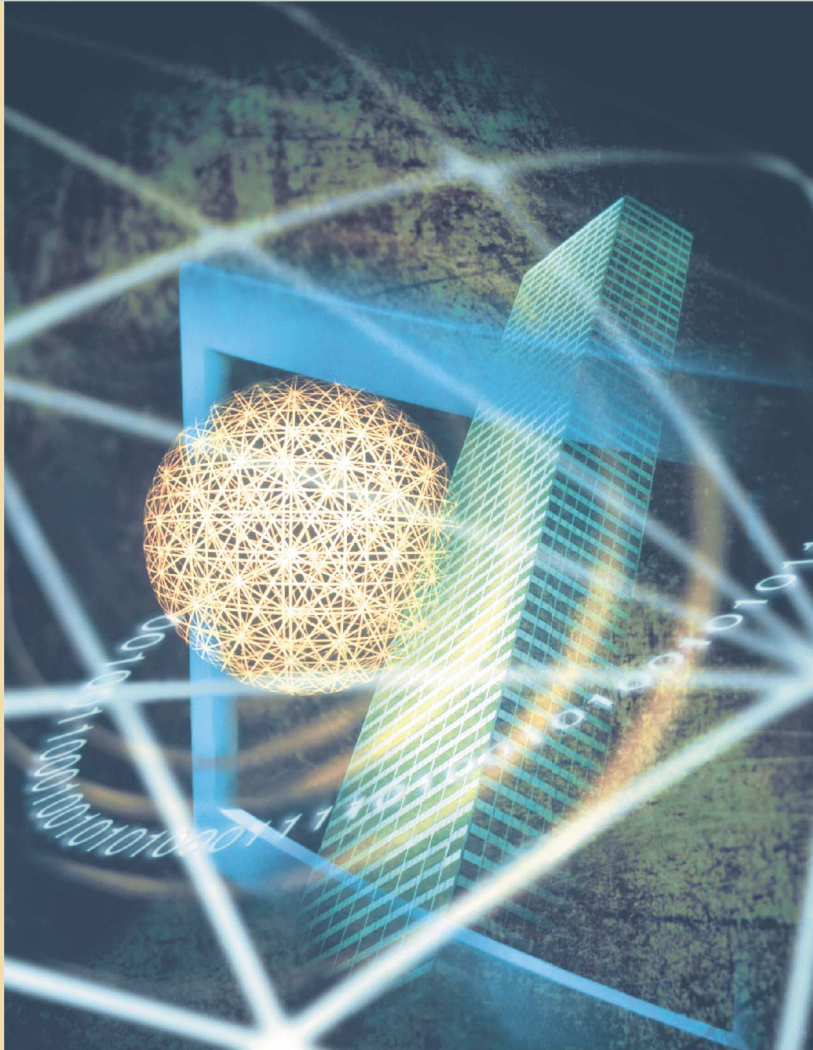


Captaris  
**RightFax**

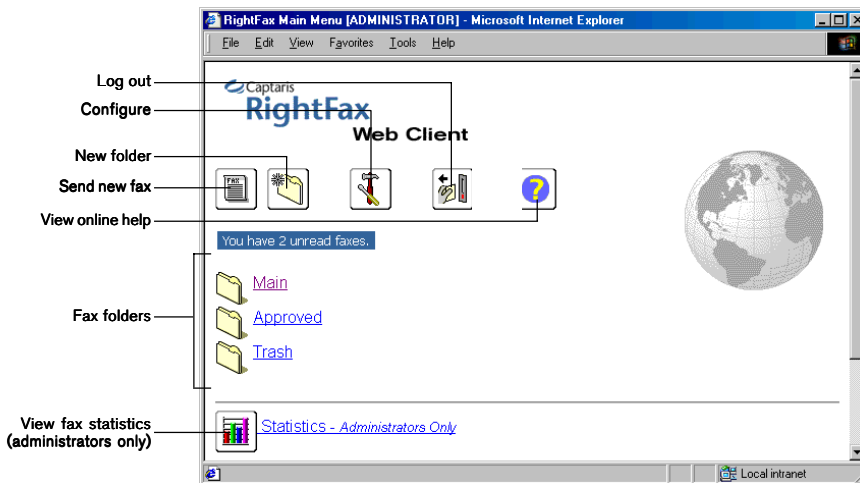


*The One Solution for  
Enterprise Fax and  
e-Document Delivery*

**Web Client™**  
**Quick Reference Card**


## Running the Web Client

To open the RightFax Web Client, point your Internet Explorer, Netscape Navigator, or other Web browser to the address (URL) of your organization's RightFax Web Client. (If you are not sure where to find the Web Client, contact your RightFax or Web administrator.) Depending on how the Web Client is configured, you may be prompted to log in with your RightFax user ID and password. When you're ready, click the **Login** button. This opens the Web Client folder view:



## Creating and Sending Documents

### To Create a New Document to Send

- 1 Click the **New Fax** button . This opens the **RightFax Fax Detail** screen.
- 2 Under **Fax Destination Information**, enter addressing information for a fax or e-mail recipient. Under **Cover Sheet Notes**, type any notes you want to appear on the cover sheet. Under **Fax Transmission Options**, add file and library document attachments, and specify any other sending preferences you want.
- 3 Click **Submit Fax** to send the document.


### To Send Your Document to a Fax Address

- 1 Open the **RightFax Fax Detail** screen.
- 2 Under **Fax Destination Information**, enter the recipient's name, fax number, and other contact information. The fax number and all boxes marked in bold are required.


## To Send Your Document to an E-mail Address

- 1 Open the **RightFax Fax Detail** screen.
- 2 Under **Fax Destination Information**, click the arrow next to **Fax Number** and select **Email** from the list. Enter the recipient's name, e-mail address, and other contact information. The e-mail address and all boxes marked in bold are required.

## To Select an Address from Your Phonebook


- 1 Under **Fax Destination Information**, click the **Phonebook Search** button  to display all the entries in your personal RightFax phonebook. You can select one phonebook entry per document. If you select a group phonebook entry, the document will be sent to all members of that group.
- 2 Click the check mark next to the entry to which you want to send the document. This returns you to the **RightFax Fax Detail** screen with the recipient's addressing information entered under **Fax Destination Information**. If you selected a group phonebook entry, the phonebook ID will appear in the **Name** field.

## To Include a Cover Sheet with Your Document


- 1 Under **Cover Sheet Notes**, type any notes you want to appear on the cover sheet.
- 2 Under **Fax Transmission Options**, click the **More Options** button .
- 3 Select **Send Cover Sheet** to include a cover sheet with your document. Select **Use Fine Mode Resolution for Cover Sheet** to render the cover sheet in the highest resolution possible. In the **Cover Sheet to Use** box, select a cover sheet from the list. Finally, under **Fax Source Information**, enter your contact information as you want it to appear on the cover sheet.
- 4 When you have set the cover sheet options you want, click the **Submit Options** button.

## To Attach Library Documents

Library documents are frequently used documents that your RightFax administrator has stored on the server for easy access. Marketing materials, price lists, and product specifications are commonly stored as library documents.

- 1 Under **Fax Transmission Options**, click the **Library Documents** button .
- 2 Click the check mark next to the library document you want. The document you specify will be added to the **Current Fax Attachment** list at the bottom of the **RightFax Fax Detail** screen. Library documents will be added to the document in the order they appear in the **Current Fax Attachment** list.


## To Attach Files to Your Document

- 1 Under **Fax Transmission Options**, click the **Attach File** button .
- 2 Type the name of the file to attach or click the **Browse** button to select the file you want, and then click the **Upload** button. The file you specify will be added to the **Current Fax Attachment** list at the bottom of the **RightFax Fax Detail** screen. File attachments will be added to the document in the order they appear in the **Current Fax Attachment** list.

When sending to an e-mail address, you can check the **Native** option in the **Current Fax Attachments** list to send an attached file in its native file format, rather than being converted to a graphic format.


## To Add an Overlay Form to Your Document

Overlay forms are image files that combine with your document so the two images appear together. Company letterhead is a commonly used overlay form. You can add one overlay form per document.

- 1 Under **Fax Transmission Options**, click the **More Options** button .
- 2 In the **Form Type to Use** box, select the form you want from the list.

## To Assign Billing Codes to Your Document






Billing codes may be used by the RightFax administrator to identify the sender, the recipient, or the content of documents. Billing codes do not normally appear in your documents but are stored with each document on the server.

- 1 Open the **RightFax Fax Detail** screen.
- 2 Under **Fax Destination Information**, enter one or two billing codes, or click the **Billing Search** button  to select from a list of available billing codes.

## Adding Phonebook Entries

The RightFax Web Client lets you create a personal phonebook of fax and e-mail addresses. You can add both individual entries and group entries that let you easily send one document to multiple recipients. Phonebook entries can be private or published. Private phonebook entries can be viewed only by you. Published phonebook entries can be viewed by any other RightFax user on the network.



## To Create an Individual or Group Phonebook Entry

- 1 From the Web Client folder view, click the **New Fax** button . This opens the **RightFax Fax Detail** screen.
- 2 Under **Fax Destination Information**, click the **Phonebook Search** button .
- 3 Click the **New Phone Entry** button  to create an individual phonebook entry or the **New Phone Group** button  to create a group entry.
- 4 Enter a name for the entry in the **Entry ID** box, and check the **Published Entry** option if you want this phonebook entry to be available to other users on your network.
- 5 If you are creating an individual entry, complete the addressing boxes. All boxes are optional but you must enter at least one fax number or e-mail address. If you are creating a group entry, type the phonebook IDs you want in the **Group Members** box, and press ENTER between each ID you add. Group phonebook entries can only be made from existing phonebook IDs. If you want to add a new fax or e-mail address to a group phonebook entry, you must first make it an individual phonebook entry.
- 6 When you have completed the addressing information or added all the phonebook IDs you want, click the **Save Phone Entry** button. The new entry will be immediately added to your personal phonebook. Depending on your browser, you may need to click the **Update** button  to refresh the list of phonebook entries.




## Forwarding and Routing Documents

When you forward a document from your Web Client mailbox, a copy of the document is sent to the recipient and the original document remains in your mailbox. When you route a document, the original document is sent to the recipient and is removed from your mailbox.

### To Forward a Document to a Fax Number or E-mail Address


- 1 From the Web Client folder view, click the folder to open, and then open the document to forward by clicking the magnifying glass icon on the left .
- 2 Click the **Forward to Fax** button  at the top of the screen.
- 3 Complete the addressing fields and sending options in the **Fax Detail** screen, and click the **Submit Fax** button to send.

### To Forward or Route a Document to Another RightFax User on Your Network

- 1 From the Web Client folder view, click the folder you want, and then open the document you want to send by clicking the magnifying glass icon on the left .
- 2 Click the **Forward to User** button  or the **Route to User** button  at the top of the screen.
- 3 Enter the RightFax user IDs of the recipients in the space provided. You can forward a document to multiple recipients by entering each user ID separated by spaces. If you are routing the document, you can only specify one user ID.
- 4 Enter any notes you want added to the document history and click the **Forward/Route Fax** button to send.


## Creating and Deleting Folders

### To Create a New Folder

- 1 From the Web Client folder view, click the **New Folder** button .
- 2 Type a name for the new folder and click the **Create Folder** button.


### To Delete a Folder


You must delete or move all of the documents out of a folder before the folder can be deleted (refer to Viewing Documents on the next page).


- 1 From the Web Client folder view, click the folder to delete.
- 2 If the folder contains no faxes, click the **Delete Folder** button . When prompted to confirm that you want to delete the folder, click **Yes**.

## Navigating in the Web Client


The RightFax Web Client is run entirely within your Web browser, but the window does not contain the standard browser navigation bar. This is because the Web Client does not keep track of individual Web pages the same way your browser does. When working in the RightFax Web Client, always use the following navigation methods:

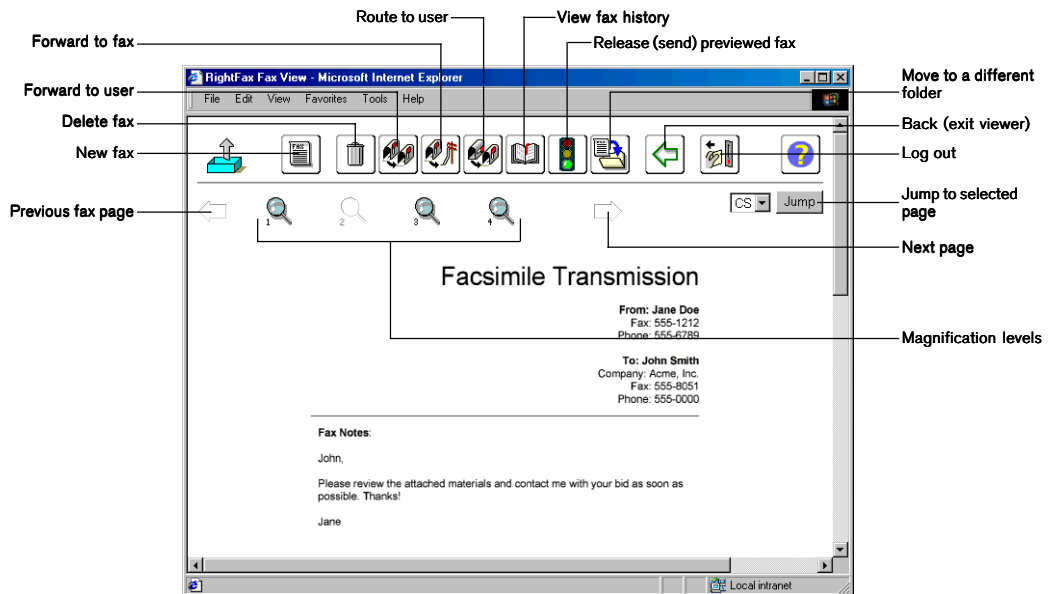
To return to the previous page, click the **Back** button  included on every Web Client screen, instead of the **Back/Previous** button built into your browser.

For security reasons, when you exit the Web Client, click the **Logout** button .

To open online help that describes the current screen, click the **Help** button .

## Viewing Documents

To view a document in the RightFax Web Client, from the Web Client folder view, click the folder to open. This opens a list of the document you have sent and received. To open a document, click the magnifying glass icon .



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