

# Using INterraFAX

This chapter introduces the INterraFAX product and its features. It provides instructions for using INterraFAX in conjunction with INterraWEB, INterraDESK, and INterraDESK for Outlook.

This chapter assumes you have the INterraFAX client application installed on your computer and INterraFAX has been installed and configured properly on the server.

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## Understanding INterraFAX

Fax services provided by computer software have come of age in their integration with telephony and in their general application and usefulness. INterraFAX is such an application. INterraFAX works in concert with the INterra suite of telephony products to provide the convenience and privacy of having fax messages in a unified mailbox.

INterraFAX provides the following features:

- **Personal fax services.** With INterraFAX, you can view, print, send, and receive faxes at your workstation using INterraWEB, INterraDESK, or INterraDESK for Outlook interfaces, Microsoft Windows Explorer, or any Windows application.
- **Receiving faxes in your inbox.** The ability to receive faxes in your inbox.
- **Creating fax attachments.** While sending or forwarding faxes, you can select a cover page or add a note that is attached to the fax being sent. You can select a company logo and a signature to include in the cover page.
- **Automated fax services.** INterraFAX offers several automated fax services. These include fax back capability, fax-on-demand within the same phone call, fax store-and-forward services, and fax broadcasting and multicasting.
- **Xerox Textbridge OCR support.** INterraFAX is updated to the latest version of Xerox Textbridge OCR, which allows you to convert your faxes to editable text files.
- **Windows Address Book services.** INterraFAX supports the Windows Address Book and allows you to create, organize, modify, and delete fax contact and distribution list information. The Windows Address Book gives you the ability to import multiple read-only phonebooks from other existing data sources.
- **Intelligent fax board and modem support.** INterra supports Brooktrout TR114 intelligent fax boards and selected Control modem boards.

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## Using INterraFAX

INterraFAX is an add-on application you can use to create, view, annotate, forward, delete, and convert a fax to text.

With INterraFAX you can send faxes to other mailbox owners, company fax machines, or fax machines on external lines. You can also broadcast faxes, and you can send faxes with a cover page and with an attached note.

Faxes created as computer-generated faxes are generally of higher quality than those transmitted using a standard fax machine. Cleaner faxes are also converted to text much more reliably by Optical Character Recognition (OCR) applications.

The following is a list of tasks that can be performed using INterraFAX:

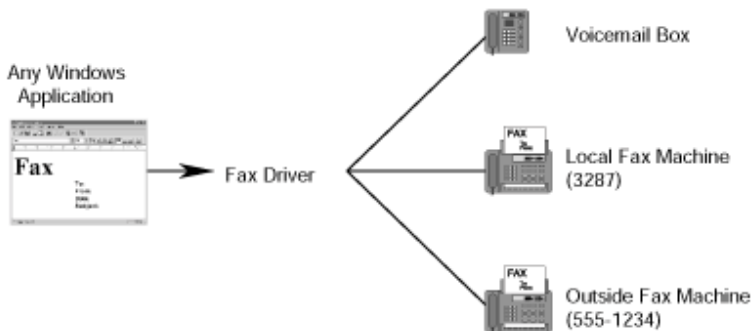
- Creating a fax
- Sending a fax
- Sending a fax to a INterra box from a fax machine
- Viewing a fax
- Annotating a fax
- Printing a fax
- Exporting a fax
- Converting a fax to text
- Forwarding a fax
- Archiving a fax

**NOTE:** If you live in the UK or Australia, or use older style U.S. fax machines, you will need a Fax Only box to receive faxes. Ask your System Administrator for details.

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## Creating a Fax

INterraFAX lets you create a fax to send to another mailbox owner or any fax machine from most Windows applications.



**Figure 4-1. Sending Faxes**

### Creating a Fax from Any Windows Application

- **To create a fax from any Windows application**
  1. Open a Windows application.
  2. Type the fax.

3. Select **File > Print** to open the **Print** dialog box or as appropriate for your application.

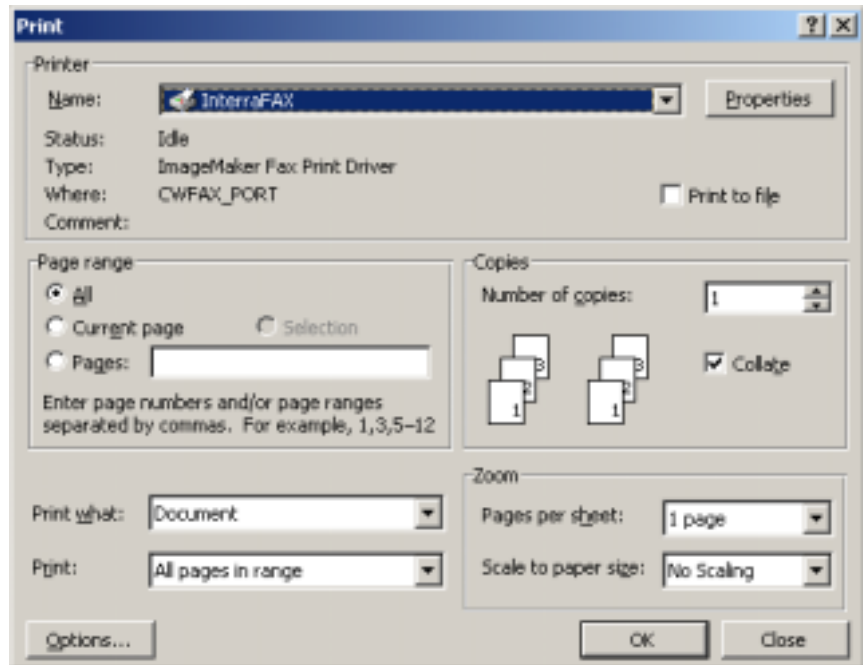
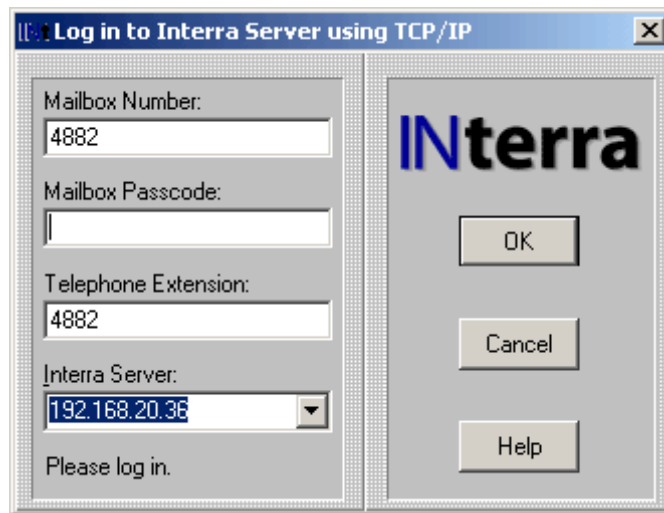


Figure 4-2. Print Window

4. Select the **Down Arrow** to the right of the **Name** field to view a list of print drivers.
5. Select the **INterraFAX** driver to view the **INterraFAX** driver in the **Name** field.

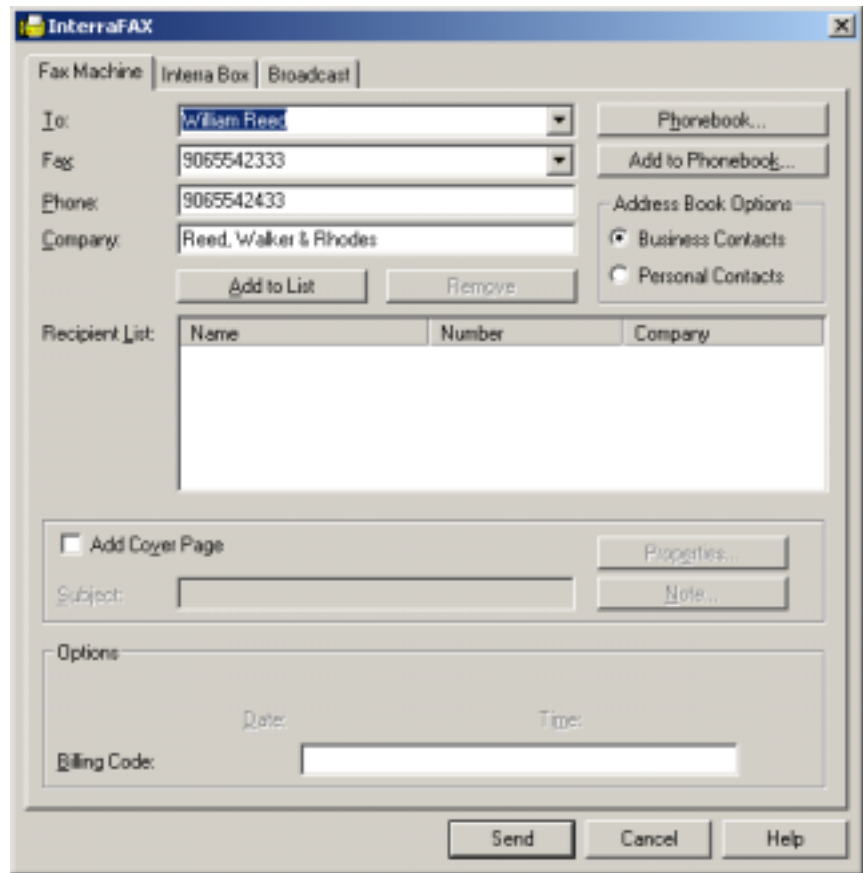
6. Select **OK** to open the **Log in to INterra Server using TCP/IP** dialog box.



**Figure 4-3. Log in to INterra Server Window**

7. Type your mailbox passcode.

8. Select **OK** to view the **Fax Machine** tab options from the **INterraFAX** window.




**Figure 4-4. INterraFAX Window**

- NOTE:** You can send your fax to single or multiple fax machine(s), to single or multiple INterra box(es), or as a broadcast to multiple recipient(s) at a specific time.
9. Refer to the appropriate section.

## Creating a Fax from INterraDESK for Outlook

### ► To create a fax from INterraDESK for Outlook

1. Select **New Fax Message**  from the Outlook Toolbar to open the INterra FAX dialog box.
2. Select the file type in the **Files of Type** window.
3. Navigate to the file you wish to send as a fax.
4. Select **Open** to launch the application that the file is associated with and to open the **INterraFAX Print Control** box.

For information on sending the fax, see “Sending a Fax” on page 4-14.

## Creating a Fax from Windows Explorer

### ► To create a fax from any Windows Explorer

1. Open Windows Explorer.
2. Right-click the file you want to send as a fax.
3. Select **Send To**.
4. Select **INterraFAX**.

If it is a supported file type, the **INterraFAX Print Control** dialog box opens. Depending on your INterraDESK preferences, you may need to select a network protocol and/or log in to INterra.

For information on sending the fax, see “Sending a Fax” on page 4-14.

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## Setting up New Contacts for a Phonebook

➤ To set up new contacts for a phonebook

1. Select **Start > Programs > Accessories > Address Book** to open the **Address Book** window.

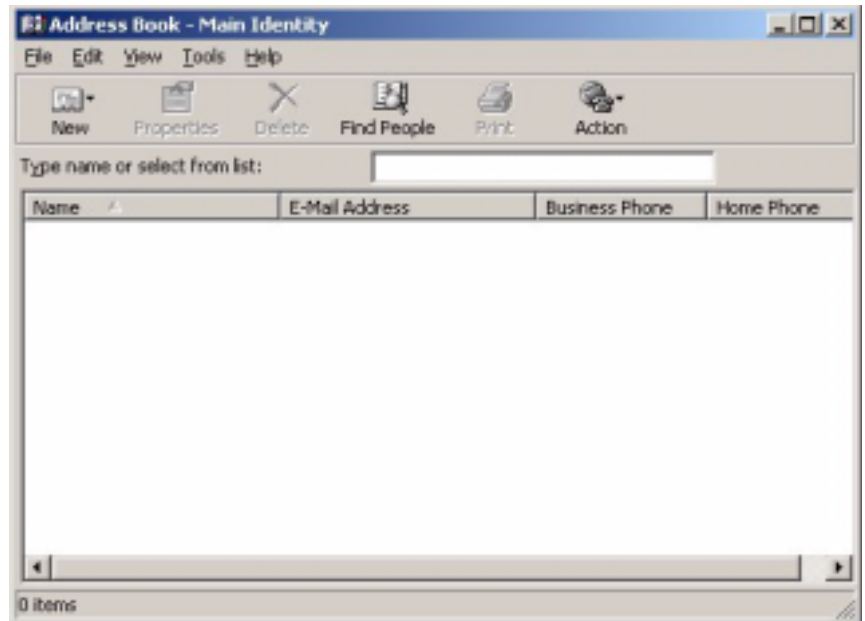
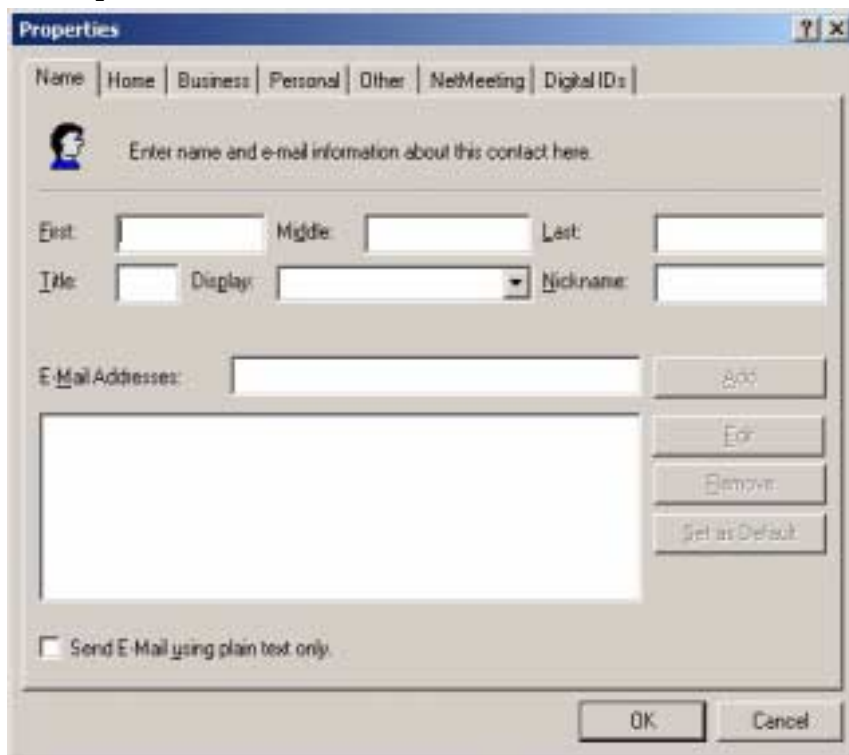


Figure 4-5. Address Book Window

2. Select **New**.

3. Select **New Contact** to view the **Name** tab from the **New Contact Properties** window.



**Figure 4-6. New Contact Properties Window**

4. Type the first name of the contact in the **First** field.
5. Press <Tab> to the **Middle** field and type the middle name of the contact.
6. Press <Tab> to the **Last** field and type the last name of the contact.
7. Type information in all fields.
8. Select all tabs and type information in all fields.
9. Select **OK** to view the contact name from the **Address Book** window.

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## Setting up a New Group for a Phonebook

➤ To set up a new group for a phonebook

1. Select **Start > Programs > Accessories > Address Book** to open the **Address Book** window.

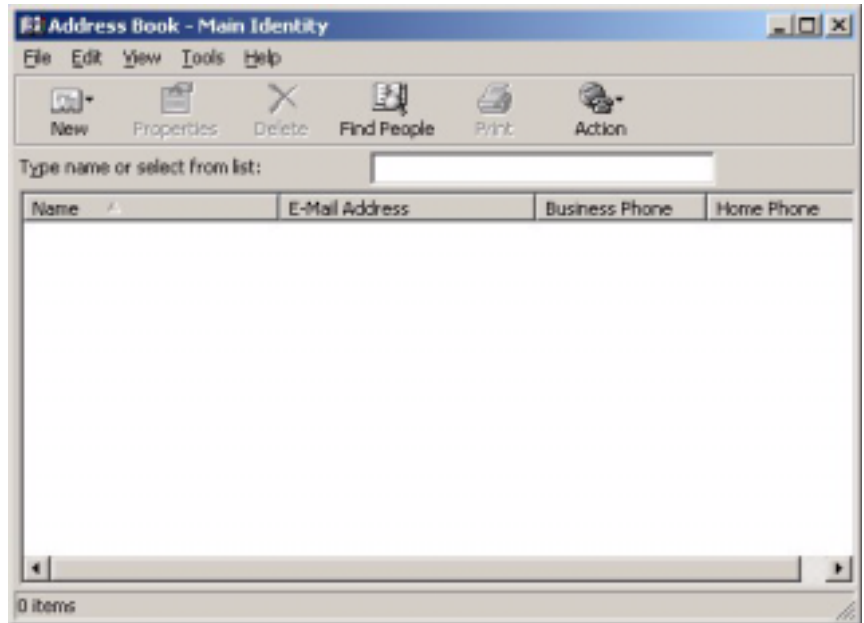
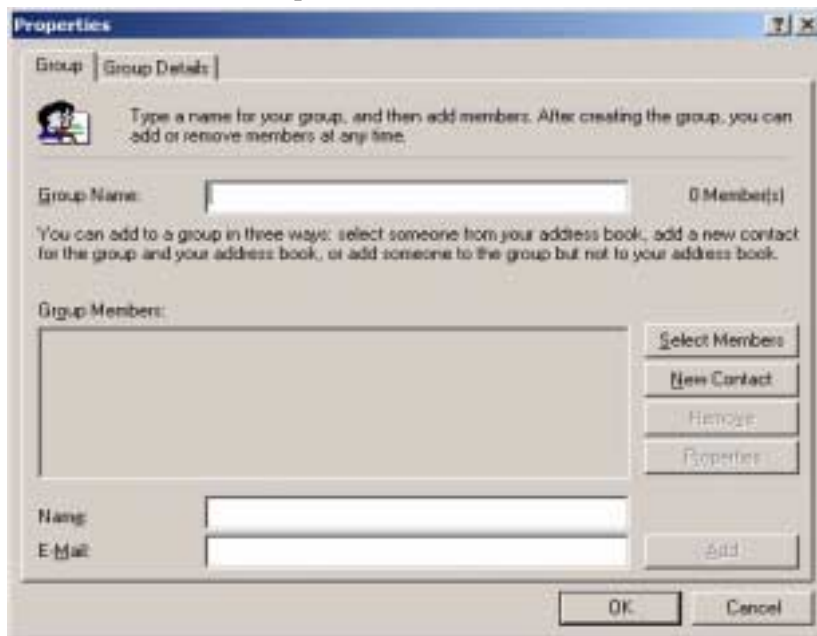


Figure 4-7. Address Book Window

2. Select **New**.

3. Select **New Group** to open the **New Group Properties** window.



**Figure 4-8. New Group Properties Window**

4. Type the group name in the **Group Name** field.

5. Select **Select Members** to open the **Select Group Members** window.

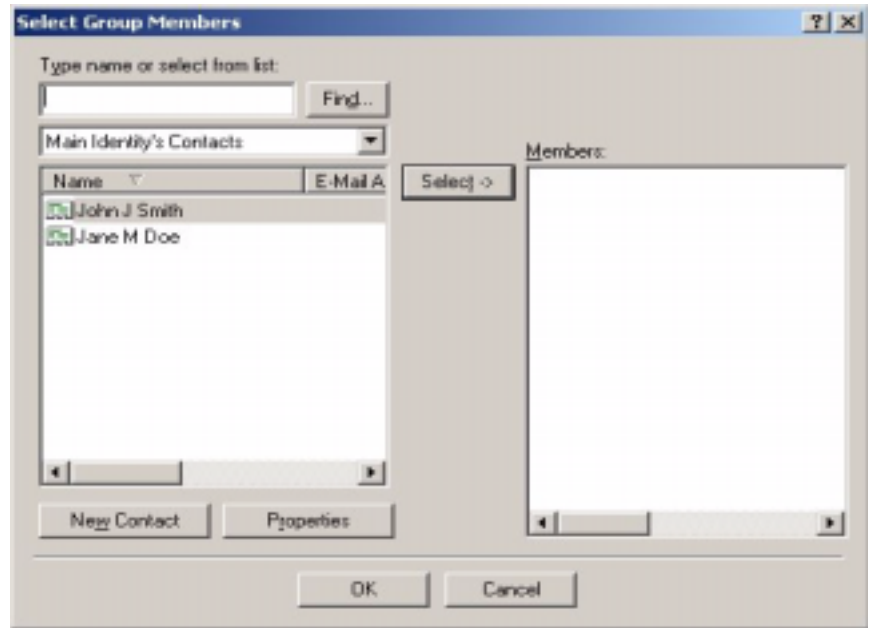


Figure 4-9. Select Group Members Window

6. Either:
  - Type the name in the **Type Name** field.
  - Double-click on a name in the **Name** box to display the name in the **Members** field.
7. Select **OK** to open the **New Group Properties** window.
8. Select **OK** to open the **New Group** in bold on the **Address Book** window.

## Sending a Fax

INterraFAX lets you send your fax to a single fax machine, multiple fax machines, or to a voice mailbox. You can also broadcast it to several recipients at a specific time.

### Sending a Fax to a Single Fax Machine

INterraFAX allows you to send a fax to a single recipient.

- **To send a fax to a single recipient**
  1. Select the **Fax Machine** tab to view the **Fax Machine** tab from the **INterraFAX** window.

The screenshot shows the 'INterraFAX' application window with the 'Fax Machine' tab selected. The 'To:' field is set to 'Robert Duncan', 'Fax:' to '8324516600', 'Phone:' to '8324516650', and 'Company:' to 'Corporate Lighting'. The 'Recipient List' table contains one entry: Julie Mayes, 7135524121, Mayes, Inc. The 'Add Cover Page' checkbox is checked, and the 'Subject' is 'Information for visit'. The 'Send' button is highlighted.

| Name        | Number     | Company     |
|-------------|------------|-------------|
| Julie Mayes | 7135524121 | Mayes, Inc. |

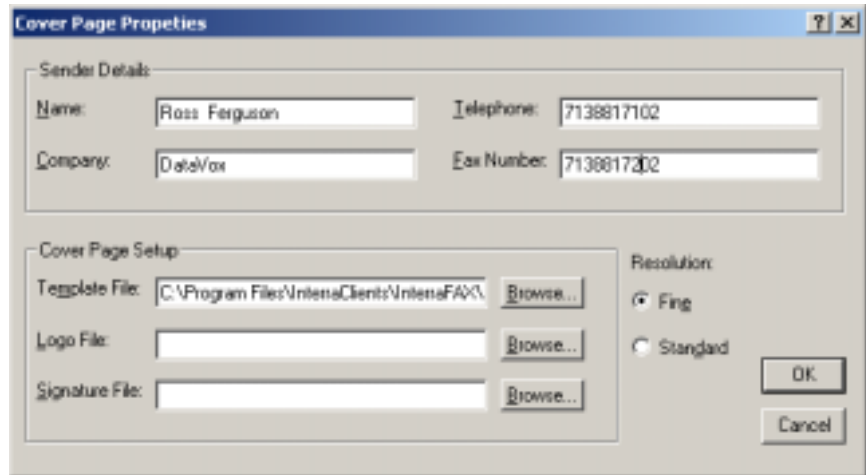
Figure 4-10. Fax Machine Tab

2. Type the recipient information in the **To** field.
3. Select the **Fax** field and type the fax number.  
**NOTE:** You may need to preface the dialing suffix with commas (,) to dial correctly.
4. Select the **Phone** field and type the phone number.
5. Select the **Company** field and type the company name.
6. To add a cover page, perform the following:
  - a. Mark the **Add Cover Page** box.

**NOTE:** The fax cover page is limited to the default **template file**.

The fax cover page can only be used with fax pages sent from an outbound port to a fax machine and cannot be sent using this application to an internal box number.

- b. Select **Properties** to open the **Cover Page Properties** window.



**Figure 4-11. Cover Page Properties Window**

- c. Type information in the **Sender Details** field.
    - d. Select **Fine** or **Standard Resolution** radio button.
    - e. Select **OK**.
7. To include a subject line, type the subject in the **Subject** field.
8. To include an annotation to the cover page, select **Note** and type your note text.
9. Select **OK**.

10. Select the **Billing Code** field and type the billing code if a billing code applies.

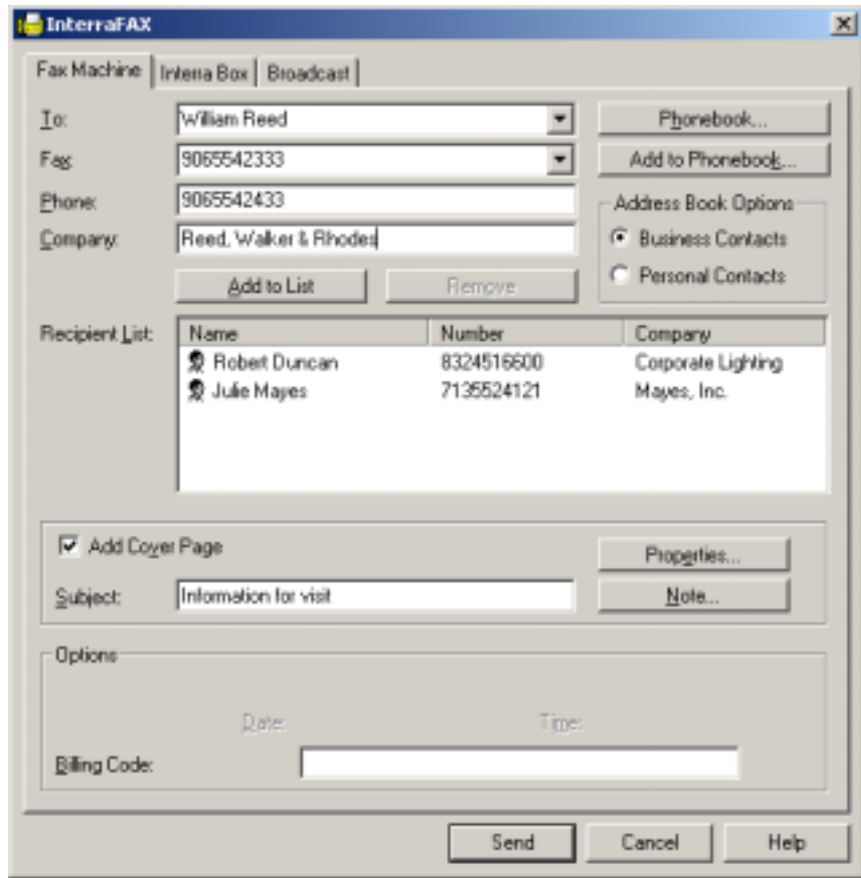
**NOTE:** This allows companies to track fax usage information by group in the fax log.

11. Select **Send** to send the fax.

## Sending a Fax to Multiple Fax Machines

INterraFAX allows you to send a fax to multiple recipients (multicasting). To send a fax to multiple recipients

1. Select the **Fax Machine** tab to view the **Fax Machine** tab options from the **INterraFAX** window.



**Figure 4-12. Fax Machine Tab**

2. To send a fax to multiple fax machines perform the following either:

- Enter the name and number of the person you want to send a fax to in the **To** and **Fax** fields and select **Add to List** to add the name and fax number to the **Recipient List** field. Continue to enter all the names and numbers for all the people you want to send the fax.
- Do the following:
  - a. Select **Phonebook** to open the **Phonebook Address Book** window.

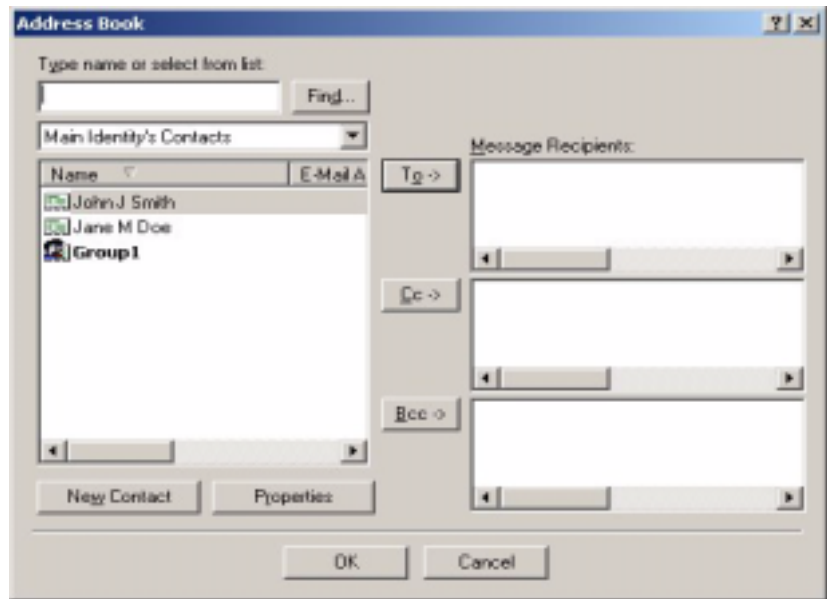


Figure 4-13. Phonebook Address Book Window

- b. Either:
    - Type the name(s) in the **Type name or select from list** field.
    - Select the name(s) from the **Name** list and select the **To**, **Cc**, or **Bcc** buttons.
  - c. Select **OK** to view the names(s) or group(s) from the Recipient List box.
3. Select the **Phone** field and type the phone number.
  4. Select the **Company** field and type the company name.
  5. To add a cover page, perform the following:

- a. Mark **Add Cover Page** box.

**NOTE:** The fax cover page is limited to the default **template file**.

The fax cover page can only be used with fax pages sent from an outbound port to a fax machine and cannot be sent using this application to an internal box number.

- b. Select **Properties** to open the **Cover Page Properties** window.

**Figure 4-14. Cover Page Properties Window**

- c. Type information in the **Sender Details** field.
- d. Select **Fine** or **Standard** resolution radio button.
- e. Select **OK**.
6. To include a subject line, type the subject in the **Subject** field.
7. To include an annotation to the cover page, select **Note** and type your note text, then select **OK**.
8. Select the **Billing Code** field and type the billing code if a billing code applies.
 

**NOTE:** This allows companies to track fax usage information by group in the fax log.
9. Select **Send** to send the fax.

## Sending a Fax to an INterra Box

► To send a fax to an INterra box

1. Select the **INterra Box** tab to open the INterra Box tab options from the **INterraFAX** window.

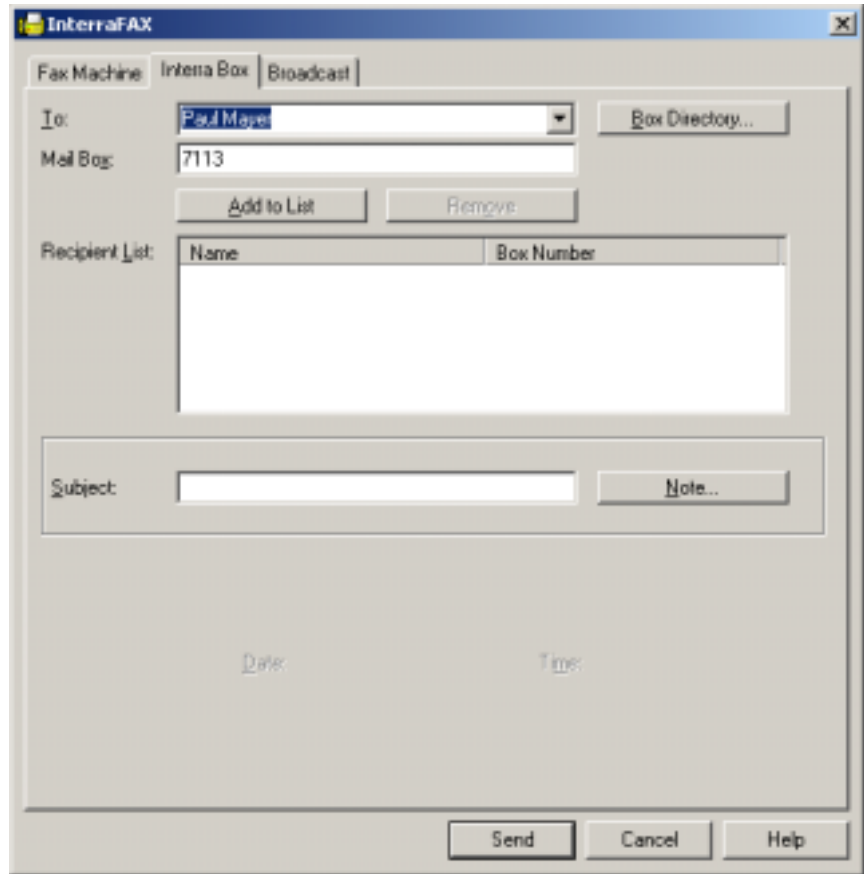
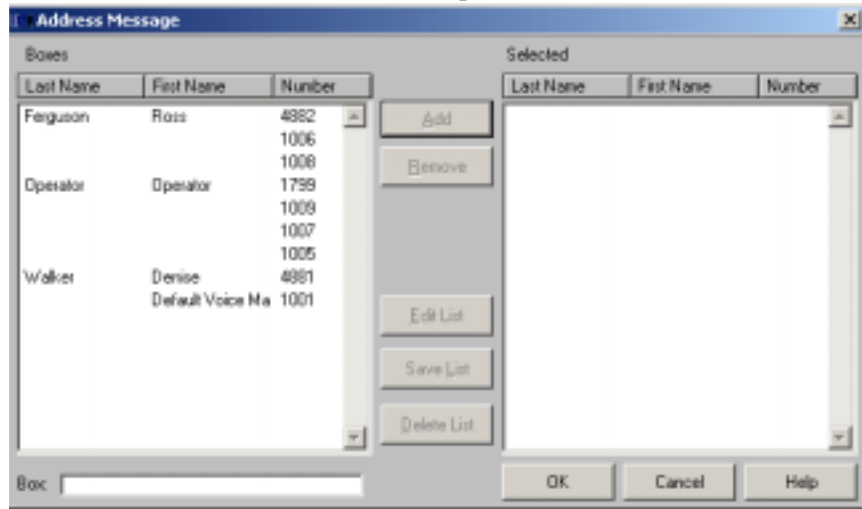


Figure 4-15. INterra Box Tab

2. Either:
  - Type information in the **To** field
  - To send a fax to multiple boxes, perform the following:

- a. Select **Box Directory** to open the **Address Message** window.



**Figure 4-16. Address Message Window**

- b. Select the name(s) in the **Boxes** field.
- NOTE:** You can hold down the <Shift> key to select consecutive groups of available boxes or you can hold down the <Ctrl> key to select individual available boxes.
- c. Select **Add** to move the names to the **Selected** field.
- NOTE:** To remove name(s) from the **Selected** field, select the name(s) in the **Selected** field and select **Remove**.
- d. Select **OK** to view the names from the **Recipient List** field.
3. Select the **Mail Box** field and type the mailbox number.
  4. To include a subject line, type the subject in the **Subject** field.
  5. To include an annotation to the cover page, select **Note** and type your note text.
  6. Select **OK**.
  7. Select **Send** to send the fax.

## Broadcasting a Fax

Fax broadcasting is treated as a single fax print job. This means one transmission report is created, which contains detailed information on the status of each recipient.

The server is responsible for fax broadcasts. This frees up the client for other tasks. But it also means server resources are impacted during broadcasting. For minimum impact, fax broadcasting times may be restricted to off-peak times by your system administrator.

► **To broadcast a fax**

1. Select the **Broadcast** tab to view the Broadcast tab options from the **INterraFAX** window.

The screenshot shows the 'Broadcast' tab in the InterraFAX application. The 'To:' field is populated with 'Julie Mayes', the 'Fax:' field with '7135524121', and the 'Company:' field with 'Mayes, Inc.'. The 'Address Book Options' section is set to 'Business Contacts'. The 'Recipient List' table is currently empty. The 'Job' section has an empty 'Job Name' field. The 'Options' section has empty fields for 'Delivery', 'Date', 'Time', and 'Billing Code'. The 'Send', 'Cancel', and 'Help' buttons are visible at the bottom.

**Figure 4-17. Broadcast Tab**

2. To send a fax to multiple fax machines perform the following:
  - a. Type the recipient information in the **To** field.
  - b. Select **Fax** field and type the fax number.

c. Select **Add to List** to add the name and fax number to the **Recipient List** field.

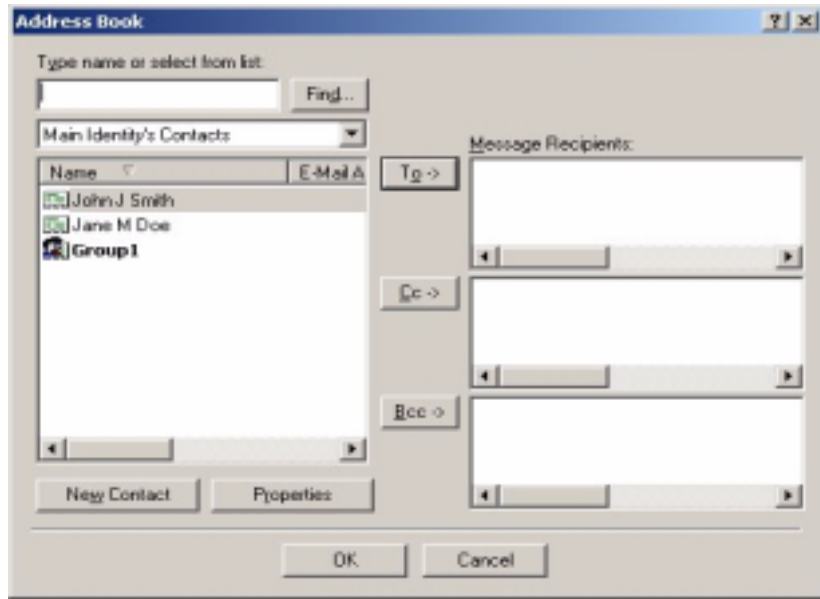
d. Repeat Steps a through c for all recipients.

Or

a. Select one of the **Radio** buttons: in the **Address Book Options** field:

- Business Contacts
- Personal Contacts

b. Select **Phonebook** to open the **Phonebook Address Book** window.



**Figure 4-18. Phonebook Address Book Window**

c. Either:

- Type the name(s) in the **Type name or select from list** field.
- Select the name(s) from the **Name** list and Select the **To**, **Cc**, or **Bcc** buttons.

d. Select **OK** to view the name(s) or group(s) in the **Recipient List** box.

3. Select the **Company** field and type the company name.

4. Select the **Job Name** field and type the job name.

5. Select the **Billing Code** field and type the billing code if a billing code applies.

**NOTE:** This allows companies to track fax usage information by group in the fax log.

6. Select **Send** to send a fax broadcast.

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## **Sending a Fax to a INterra Box from a Fax Machine**

If a box is set up to receive faxes, it can receive faxes from any fax machine, inside or outside the telephone system. After the box receives the fax, it can be viewed using the fax viewer.

- ▶ **To send a fax to a INterra box from a fax machine**
  1. Dial in to the system.
  2. Dial the extension number of the destination box.  
The box owner's greeting plays.
  3. As soon as you hear the box greeting begin to play, press the **Start Send** button.  
INterra will detect the fax tone and receive the fax.
  4. To leave a voice message with the fax, record the message first.
  5. Press the # key.
  6. You are then prompted to press 8 to send a fax
  7. Press the **Start Send** button

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## Viewing a Fax

To view a fax, you must access it through INterraWEB, INterraDESK, INterraDESK for Outlook, or the INterraFAX Viewer. A fax message, like a voicemail message, appears in the INterraWEB and INterraDESK Message List or the Outlook Inbox.

Faxes can also be received into any SMTP compatible email account using INterra's email notification feature. Refer to the Administering INterra guide for more information.

The fax message's information includes where it was sent from, its creation date and time, and the number of pages it contains. When you view a fax, the INterraFAX Viewer opens the fax.

**NOTE:** If you use an email integration other than Outlook, the fax will appear as an attachment to an email.

The INterraFAX Viewer can view FAX, BMP, PCX, DCX, ANO, TIF, non-interlaced GIF images, and ASCII files with lines no longer than 315 characters.

### ► To view a fax

1. Open the message using one of the following options:
  - a. Either
    - Double-click the fax message from INterraDESK or INterraDESK for Outlook to open the view to load the fax.
    - Launch the INterraFAX Viewer and select **File** menu > **Open** > fax you wish to open to view the fax from the viewer.
2. To select the page to view, select the **View** menu.
3. Select **Go to Page**.
4. Type the page number in the **Page Number** field.
5. Select **OK**.

**NOTE:** You can also select the page number from the icons at the bottom of the page.

The Viewer can display as many as 100 pages of a fax. The viewer's Page Bar on the bottom displays icons for as many as 10 pages at a time. To view more pages, select the **Arrow** button to the right of the **Page Bar**.

### ► To improve the appearance of a fax

1. Select the **View** menu > **Image Enhancement**.
2. To enhance the fax, select one of the following options:

- **Light** to lighten the fax
- **Dark, Darker, or Darkest** to darken the fax
- **Gray Scale** to “smooth” the image
- **Normal** to revert to the original image

The fax immediately changes to reflect your selection.

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## Annotating a Fax

The viewer contains several tools on a floating Toolbar for annotating and editing faxes you receive.



**Figure 4-19. Fax Viewer Toolbar**

The floating Toolbar lets you perform the following:

- Select an annotation
- Select an area
- Apply sticky notes
- White out
- Rubber stamp
- Highlight
- Draw lines and arrows
- Draw rectangles and circles

If you annotate a fax and then save it, the annotations will display each time you open the message from your In Box. However, when you route the fax to another user, it will not contain the annotations. To send an annotated fax to another fax machine or mailbox, you must print the annotated fax to the INterraFAX driver from within the viewer.

**NOTE:** Most annotations appear behind the original fax text, so they will not cover up information that appears on the original fax. Sticky Notes are an exception.

➤ **To hide annotations**

1. Select the **View** menu > **Annotations/**
2. Select **Hide** to temporarily hide all annotations.

## Printing a Fax

You can send any fax to a standard (non-PostScript) printer.

► **To print a fax**

1. Launch the INterraFAX Viewer.
2. Select the **File** menu > **Open**,
3. Select the fax you wish to open.
4. Either
  - Select **Print**.
  - Select the **File** menu > **Print**.

**NOTE:** If the printer you select is the INterraFAX driver, you will be sending the annotated fax to another fax machine or mailbox.

5. Select the **Down Arrow** box to the right of the **Name** field.
6. Select the desired printer.
7. Select **OK**.

**NOTE:** If you are receiving faxes as a SMTP email attachment, select the **Tiff** file using your default Tiff viewer and select **print**.

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## Exporting a Fax

You can export a fax as a graphics image to archive it. An exported fax can also be opened in many graphics applications for viewing and editing later.

- ▶ **To export a fax as a graphics file**
  1. Launch the INterraFAX Viewer
  2. Select the **File** menu > **Open**.
  3. Select the fax you wish to open.
  4. Select the **File** menu > **Export**.
  5. Type the location in the **Location** field.
  6. Type the file name in the **Filename** field.
  7. Type the format in the **Format** field.
  8. Select **OK**.

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## Converting a Fax to Text (OCR)

You can convert a fax to text using Xerox TextBridge OCR (Optical Character Recognition) if you selected it during INterraFAX integration installation. After the fax has been converted to text, you can save the text file, or copy and paste the text into a word processor.

► **To convert a fax to text**

1. Select the fax message in the INterraDESK Message List in either INterraDESK or INterraDESK for Outlook
2. Select **OCR**.
3. Type the file name in the **Filename** field.
4. Select **OK**.

**NOTE:** The ASCII text (unformatted, plain text) is written to the filename and location you specified.

We recommend that you do not save your file to the **CWOut/tmp** directory. Any files in the **CWOut/tmp** directory are removed automatically when you exit INterraDESK for Outlook.

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## Forwarding a Fax as an Email Attachment

You forward a fax the same way you send a fax. However, you can also forward a fax to another user in INterraDESK for Outlook as an email attachment.

- ▶ **To forward a fax to another INterra user as an attachment**
  1. Select the message in your **In Box**.
  2. Select the **Compose** menu > **Forward Voice or Fax as Attachment** to open the Outlook FW: Message box.
  3. Select the **To** button to select a name from the Address Book
  4. Select **OK**.
  5. Select **Send** to forward the message as an email message with a fax attachment.

## Archiving a Fax

You can make a personal copy of a fax in INterraDESK by copying it to a disk. The fax will be saved as a **.tiff** file and can be viewed later either by using graphics editing software or by restoring it in INterraDESK.

➤ **To archive a fax**

1. Select a fax in INterraDESK.
2. Select the **Messages** menu > **Archive**.
3. Type the file name in the **Filename** field.
4. Type the type in the **Type** field.
5. Type the folder in the **Folder** field.
6. Select **OK** to archive the file(s).

➤ **To restore an archived fax**

1. Select the **Messages** menu > **Restore to INterra**.
2. Type the file name in the **Filename** field.
3. Type the type in the **Type** field.
4. Type the folder in the **Folder** field.
5. Select **OK** to restore the file(s).

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## Working with Fax Log

You can perform the following tasks with the Fax Log:

- View a fax log
- Print a fax log
- View the properties of a fax
- View a fax
- Resend a fax

### Viewing a Fax Log

From INterraWEB, INterraDESK or INterraDESK for Outlook, you can view a log of faxes that you have sent from your desktop to fax machines.

➤ **To view the fax log from INterraWEB**

1. Log into INterraWEB.
2. From the **Inbox** page, select **FAX LOG**.

NOTE: Broadcast Faxes appear in the on the **FAX LOG** page only as one fax instead of multiple faxes.

➤ **To view the fax log from INterraDESK for Outlook**

Select **View Fax Log** to open the **Fax Log** window with a list of outgoing faxes.

➤ **To view the fax log from INterraDESK**

1. Select the **File** menu.

Select the **View fax log** to view the list of outgoing faxes on the **Fax Log** window.

### Printing a Fax Log

You may want a hard copy of a fax log for billing information, fax traffic information, etc.

➤ **To print a fax log**

1. Select the **File** menu from the **Fax Log** window.
2. Select **Print**.
3. Select the **Down Arrow** box to the right of the **Name** field.

4. Select the desired printer.
5. Select **OK**.

## Viewing the Properties of a Fax

Use Fax Properties to view detailed information about a sent fax, such as the recipient's name and the current state of the fax.

### ► To view fax properties

1. Select fax from the **Fax Log** window.
2. Select the **View** menu > **Properties** to view the **Properties** of the selected fax.

## Viewing a Fax

You can use the INterraFAX viewer from the fax log to view a copy of a sent fax.

### ► To view a fax

1. Select the fax from the **Fax Log** window.
2. Select the **Edit** menu > **View Fax** to open the INterraFAX viewer and load the fax.
3. To select the page to view, select the **View** menu > **Go To Page**.
4. Type the page number in the **Page Number** field.
5. Select **OK**.
6. Close the INterraFAX viewer.

## Resending a Fax

You may want to resend a fax listed in your fax log to the recipient.

### ► To resend a fax

1. Select the fax from the **Fax Log** window.
2. Select the **Edit** menu > **Resend**.