Zetafax Client Help

Fax software solutions for business

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ZETAf**AX**®

Point. Click. Fax.

Zetafax Client Help

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Zetafax Client actions

The following topics describe how to perform common tasks with the Zetafax Client:

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How do I send a fax?

- To send a fax, select the Message tab and click **New Fax.** Alternatively, click the **Send message**

  button on the quick access bar at the top of the Zetafax client window.
- This displays the **Fax Wizard - recipients** dialog box allowing you to address your fax message.

- Enter a name, organization (optional), and the destination fax number.
- Click the **Next** button to continue.

For more information about the addressing options, and using the address book, see How do I use my address book?

The **Fax Wizard** - **Coversheet** dialog box then allows you to choose the coversheet and add any content you wish to be sent with your fax, such as a subject and any notes, all information added to your coversheet is displayed to allow you to review the appearance of your fax message:

- In the **Subject** box, type a subject for your email.
- Select a coversheet.
- Add any notes you wish to send with your fax in the notes field.
- Click the **Next** button to continue.

The **Fax Wizard Options** dialog box then allows you to set various options relating to the sending of your fax:

- For simplicity, leave the **Option** settings as they are, and press **Finish** to send your fax.

For more information about the options see How do I specify options when sending a fax?

- Switch to the **Zetafax Client** window.

The fax will appear in your **Outbox** window, and the icon in the **Status** column shows the status of the fax.

For more information, see Status icons.

Related Topics:
How to Print to Zetafax from applications
Integration with Microsoft Office and Outlook

How do I specify options when sending a fax?

The **Fax Wizard - Options** dialog box is displayed automatically when you send a fax, to allow you to specify additional options.

You can specify:

- Documents to be attached to the fax.
- Whether you want a **Quick view** of your fax before it is sent.
- Whether you want to hold your fax in your **Outbox** for previewing.
- What charge code (if any) you want to use to send with your fax.

In addition, you can change message sending options by accessing the option tabs at the top of this dialog. These options are:

Letterhead
Priority
Time of Sending

Resolution
From

Setting the letterhead option
The **Letterhead** option allows you to use a letterhead that will be applied to every page of the first document that you are sending as a fax.

To select a letterhead:

1.   Choose the **Letterhead tab**.

2.   Select the **Add letterhead to first document** option.

3.   In the **Letterhead** box, select the Letterhead you wish to use.

Note: If the **Letterhead** box is grayed out, your fax only consists of a coversheet, and therefore no letterhead can be added.

Click here for information on how to create a letterhead.

Setting the priority of your fax
The **Priority** option allows you to specify how urgent your fax job is. You can choose between:

Priority level	Description
Normal	Queues the fax at the server to be sent in the order the server receives them.
Urgent	Sends the fax to the front of the server queue.
Background	Queues the fax at the server to be sent only when there are no other faxes waiting.

Setting the time of sending
The **Time of Sending** option allows you to defer sending your fax until an Off peak time period (set using the Zetafax Configuration program). You can also decide on an exact time and date you wish your fax to be sent.

To select a specific time and date:

1.   Select the **After** option.

2.   In the **Time** box, select the time you wish you fax to be sent.

3.   In the **Date** box modify the day you wish the fax to be sent (this can be any time in the next 7 days).

Setting the resolution of your fax
As the Zetafax Server converts your fax to an image file, you can choose the quality of that fax image. The higher the resolution of your fax image, the better the quality of fax your recipient will receive.

Resolution level	Description
Draft	Low quality fax output, designed for previews.
Normal	The standard fax format.
High	High quality output.

From
The username that will be displayed on your fax, by default this will be your Zetafax username, and can be modified permanently using the Zetafax Configuration program. To change your username for a single fax job please enter the desired username into the **From** box.

To create a letterhead
1.   Print your images to Zetafax, as part of a black and white Microsoft Word file.

2. Select the **Save as an attachment or other system file** option.
3. Click **Coversheet, letterhead or attachment file**.
4. Choose the **Letterhead background – letterhead and continuation** option.
5. Type in a **Filename** and a **Description** to help you identify your coversheet.
6. Click **OK** to save your letterhead on the Zetafax Server.

How do I view a fax?

Zetafax will alert you when you receive a new fax.

Received faxes are displayed in the Zetafax **Inbox** window and marked by the unread message icon.

To read the fax
- Double-click the fax in the **Inbox** window.

The fax will be displayed in the Zetafax Viewer.

- Use the horizontal and vertical scroll bars to scroll the fax in the window.
- Click the number buttons, or the **Next** and **Previous** buttons, to step up between successive pages of the fax.

Faxes you have read remain in your **Inbox** window, but the icon changes to this   in the status column to show you have read them. For more information, see Status icons.

How do I annotate a fax?

Using the Zetafax viewer, faxes received in your Inbox can be annotated and saved either for your records or to be forwarded to another person. Likewise by printing an item to the Zetafax Printer you can annotate it prior to sending using the Zetafax Viewer.

To annotate a fax

1. Double click the fax you wish to add annotations to, the **Zetafax viewer** will automatically load the selected fax.

2. Using the annotations toolbar, you can add your annotations to your selected fax:

Annotation icon	Annotation type	Description
	Select	Allows you to select Existing annotations in order to modify or delete them.
	Properties	Allows you to modify the properties of an annotation. For example the thickness of a line or the transparency of a stamp.
	Straight line	Allows you to draw a straight line.
	Freehand line	Allows you to draw a line in any direction.
	Rectangle	Allows you to draw a rectangle.
	Highlight	Allows you to shade a rectangle.
	Text box	Allows you to add a box of text to your fax.
	Picture	Allows you to add images to your fax.
	Stamp	Allows you to add a box of preset text to your fax.

	Remove all annotations	Allows you to remove all non saved annotations.

3.   Having added the annotations that you require, save your fax and exit the viewer.

To create a custom stamp

1.   Click the Stamp icon in the annotations toolbar to view the **Stamp options** menu.

2.   Select **Add Stamp,** the **New Stamp** dialog will be displayed.

3.   Enter a name for your stamp in the **New Stamp Name** field.

This should be something descriptive, as this will be displayed as the stamp name within the **Zetafax**

   viewer.

4.   Add the text you wish to be displayed as part of your stamp into the **Stamp string**.

For example: Received by Sam Smith

In addition to adding standard text, there are two smart commands you can use within your stamps:

Stamp Command	Description
%D%	Adds the date in the short standard Windows format, for example: 02/01/06.
%DD%	Adds the date in the long standard Widows format, for example: January 01 2006.

5.   Select **OK** to save your stamp.

How do I print a fax?

- On the Zetafax **File** menu, click **Print** or select the Print [icon] button on the quick access toolbar.

Alternatively, you can print a fax directly from the **Inbox** or **Outbox** window:

- Select the fax or faxes and click the right hand mouse button, choose **Print** from the pop-up menu:

This will launch the **Print Fax** dialog where you can make your printing selections before proceeding with printing. This dialog allows you to specify the printer to use, the number of copies as well as allowing you to add a Header Line containing the transmission history of the fax.

- Click the **OK** button to print the fax.

How do I preview a message before sending it?

- Print the fax to the Zetafax printer in the usual way.
- When the **Zetafax Fax Wizard Recipients** dialog box is displayed, address the fax and click the **Next** button.
- Add the coversheet options that you wish to be sent with your fax, and click the **Next** button.
- When the **Zetafax Fax Wizard Options** dialog box is displayed select **Quick view.**

This view allows you to view each page of your fax that is rendered using the client. A thumbnail view is shown on the left hand side of the window, allowing you to navigate to any page within your fax:

This will preview your message and all client based attachments. If your fax also contains attachments that are rendered using the server, select the **Hold before sending for preview** button.

- Click the **Finish** button to send the fax.

If you have selected **Hold before sending for preview**, when the fax is ready for preview, it will appear in your **Outbox** window with the preview ⬜ icon.
For more information, see Status icons.

To preview a held fax

- Select the fax in the **Outbox** window.
- This will display the fax in the Preview pane.

To preview it in a full Zetafax Viewer window:

- Select the Message tab and click **View** . Alternatively, double-click the fax in the **Outbox** window.

When you have finished checking the fax:

- On the **File** menu, click **Exit** to close the **Zetafax Viewer**, or click the close box.
- A dialog box will be displayed to give you the option of releasing the fax for sending.
- Click the **Yes** button to release the fax or the **No** button to leave it held.
- If you choose **No** the following dialog box is displayed to allow you to abort the message:

- Click the **Yes** button to abort the message and delete it from your **Outbox** window, or the **No** button to leave the message in your **Outbox** window, in which case you can send it at a later time by selecting it and choosing **Release**.

How do I send multiple documents as a single message?

Zetafax allows you to send multiple documents as a single fax message using the **Multi-document** functionality. Multi-document faxes can combine different file types, for example Word, WordPerfect and Excel documents, into one fax message. At any stage, you can select to release all the documents as a single fax or cancel the fax and start again.

Sending multi-document faxes

* Send your document to the **Zetafax Client**

* In the resulting **Zetafax Fax Wizard - Welcome** dialog box, select the **Save as part of a Multi-document fax** option to display the **Multi-document Fax** dialog.

* Click the **OK** button to continue.

* Now open your next document to be attached and print it to the Zetafax printer.

This will launch the second **Multi-document Fax** dialog.

* To attach more documents to the fax message, select the second option from the list, open the next document and print it once more to the Zetafax printer. This operation should be repeated for each subsequent document that you wish to attach.

* Once you have sent to print the last document that you intend to add to the fax message, select **Add this document to the multi-document fax and send the fax now** and click **OK**. This will display the **Zetafax Fax Wizard - Recipients** dialog.

* Specify the recipients of the fax in the **Zetafax Fax Wizard - Recipients** dialog. Click **OK** to confirm your selection.

* In the resulting **Zetafax Fax Wizard** - **Coversheet** dialog, select the appropriate coversheet. Specify a subject line and a coversheet note as required.

* Specify any other required information in the **Zetafax Fax Wizard - Options** dialog and click **OK** to submit the multi-document fax to the Zetafax Server for sending.

Related Topics:
How to Print to Zetafax from applications

How do I get information about a message?

- Select the fax in the **Inbox** or **Outbox**, window.
- On the Message tab, click the **Info** button.

If the item is a received fax, the **Message Information** dialog box displays the filename, description (if supplied), and transmission reports:

If the item is a sent fax, the **Message Information** dialog box shows the filename, description, and additional information specified when the fax was sent, together with the transmission reports, the number of pages sent, and the connection time:

Related topics

Logs
Storing transmission reports

How do I send a text message to a mobile phone?

- Start the Zetafax Client.
- Choose the **New Item** option from the Message tab and select **New Text Message.**
- The **Text Message - Addressing** dialog box is then displayed to allow you to address the text message.
- Enter a name, organization (optional), and the destination mobile number or select an existing contact from the Previous recipients list:

- Click the **Next** button to continue.
- For more information about the addressing options, and using the address book, see How do I use my address book?
- The **SMS Message** dialog box then allows you to type a message and specify sending options.

Text messages can only contain 160 characters. As you type the message you will see a counter update. This counter shows the number of remaining characters that a single message can contain.

- Choose **Send in single message** to limit the text to one message of maximum 160 characters.
- Choose **Send in multiple messages** to send the message in multiple message instalments to allow for more than 160 characters.
- When the message is ready press the **Next** button to send the message.
- The message will appear in your Outnox window, and the icon in the Status column shows the status of the message. For more information, see Status icons.

Text Message Options

To view the **Text Message Options** select the **Options** tab and select the **Text Message option**, the Text Message Options dialog box will open to allow you to specify default settings for new text messages:

- The **Header** lets you specify a default message header.
- The **Signature** lets you specify a default message signature. On first use this field is set to your full name.

Save Sent Messages in the Sent Items Folder

The Save sent messages in Sent Items folder checkbox allows you to determine whether or not text messages are saved in the Sent Items Folder.

Delete Sent messages from Outbox

The Delete Sent messages from Outbox checkbox allows you to determine whether or not you wish text messages that have been successfully sent to be deleted from the Outbox folder. Checking this will result in your sent text messages being deleted from the Outbox, note these will not be moved to the Recycle Bin and are permanently deleted.

How do I view a text message?

Sent messages are displayed in the Zetafax **Outbox** window and marked with a mobile phone icon:

- when a message has been sent successfully.
- when a message has been sent with errors.

To read the message in the Text message Viewer
- Double-click the message in the **Outbox** window.

The text message will be displayed:

Zetafax Address book actions

The following topics describe how to perform common tasks with the Zetafax Address book actions:

Add to my address book?
Use my address book?
Use my mail address book?
Use a CSV file to address faxes?
Link an ODBC database to my address book?

How do I add to my address book?

The address books provide a convenient way of addressing faxes to regular recipients at a single click.

- On the **Server** tab, click **New Entry**.
- The **Address Book Editor** dialog box is displayed to allow you to create the entry.
- Enter the name and address details you want to add to your address book:

- Click **Private** to add the entry to your personal address book.
- The More… button allows you to specify a full postal address, and specify how the recipient should be addressed on the coversheet. For more information, see How do I specify options when sending a fax?
- Click the **Add** button to add the entry to your private address book.
- A dialog box will be displayed to confirm that the entry was successfully added.
- Click the **OK** button to confirm.
- The **Address Book Editor** dialog box remains on the screen to allow you to add further entries.
- Click the **Quit** button to close the **Address Book Editor** dialog box.

Related topics
Using a comma delimited distribution list (CSV file)
Using an ODBC compliant database with my address book

How do I use my address book?

There are several different address books that you can use with Zetafax. By default pressing the Search button will open the mail address book. Alternatively you can use "Other address books" by selecting this option from the drop down next to the search button. This help topic describes how to use address books other than the mail address book.

- Click the **Search** button drop down and select Other Address Books in the **Zetafax - Fax Wizard Recipients** dialog box:

The **Address Book** dialog box is displayed.

- Choose **Zetafax network** address book, **Zetafax private address book** , or **Zetafax network and private address books** from the **Data source** drop-down menu to specify which address books you want to use.

By default both address books are selected. The **Data source** menu also allows you to read addresses from a text file or database. For more information see Using a comma delimited distribution list (CSV file), Using an ODBC compliant database with my address book or the *Installation and Configuration Guide*.

- Type the first few letters of the name you are looking for.

The list of names and numbers will scroll directly to the first name matching what you typed:

- If necessary, select the entry you want to use and click the **Add to list** button, or double-click the entry.
- The address book entry will be added to the **List of recipients** list at the bottom of the **Address Book** dialog box.
- If required add any additional recipients to the list.
- Click the **OK** button to return to the **Zetafax Fax Wizard Recipients** dialog box.

The recipients will be shown in the **List of recipients** list.

Related topics
Using a comma delimited distribution list (CSV file)
Using an ODBC compliant database with my address book

How do I use my mail address book?

If you have an email system configured, you can use the email system (MAPI) address book instead of the Zetafax address book to address your fax or text message.

To choose whether to use the Zetafax or email address books:

- Click the **Search** button drop down and select Mail Address Book in the **Zetafax - Fax Wizard Recipients** dialog box:

If you select the mail address books, any address book searches (either by entering a name without a fax number, or by clicking **Search** on the addressing dialog box) will look in the mail address books.

If you select an address from the Global Address List - Zetafax will select the Fax number for that entry or the Mobile number when addressing a text message. If there is not a number to use a warning will be issued. You can also select a distribution list and Zetafax will unpack the list and add the individual members to the list of recipients.

If you select an address from Outlook contacts - Zetafax will select the Business Fax number for that contact or the Mobile number when addressing a text message. If there is not a number to use a warning will be issued. You can also select a distribution list from contacts and Zetafax will unpack the list and add the individual members to the list of recipients.

Using a comma delimited distribution list (CSV file)

Zetafax allows the use of an external data source to address faxes in a fax shot, mail shot, or fax broadcast. This can be achieved by using a data source file which is in CSV (comma delimited) format. Most applications allow you to save database records into CSV format.

Your CSV text file should contain the following three columns (fields):

· Full name of recipient - optional

· Organization name - optional

· Fax number - required

Note: The order of the columns in your CSV file does not matter, these will be matched up at a later stage.

Sending a fax using a CSV list

Prepare your CSV list as described above and follow these simple steps:

· Prepare the document you wish to send and print it using one of the Zetafax printer drivers.

· From the **Zetafax Fax Wizard Recipients** dialog box, click **Address book….**

· From the dialog box shown below, select **Import text file...** from **Data source**.

· Find and select the CSV text file that you require and click **OK**.

· You will now be required to match up the columns in your CSV file to the relevant fields in Zetafax. The first record in your CSV file will be shown; this often contains the field names and can be ignored by selecting the option **Skip first record in file**.

· Once you have finished click **OK**.

· You will now be taken back to the **Zetafax Address book** dialog box. Your CSV records will be listed and can be searched and selected in the same way as recipients in the Zetafax address book.

Note: Selected recipients will be automatically split into groups of 50. Each message line in your Zetafax Client will represent each group of 50 recipients.

Related topics
How do I use my address book?
How do I add to my address book?
Address books

Using an ODBC compliant database with my address book

Zetafax can link to an external data source via an ODBC link. This allows data to be set up in, for example, an Access database and used from within Zetafax.

The following steps describe how to set up an ODBC link. Some database applications may have different criteria for their set up as shown here. Please check that the database has been set up correctly before proceeding.

- Prepare the fax you wish to send and print to a Zetafax printer driver.

When the **Addressing** dialog box appears:

- Click **Address Book...**.
- From the resulting dialog box select the **ODBC-compliant database...** option from **Data source**.
- Click **Machine Data Source**.
- All the configured ODBC data sources on your machine will be displayed.
- Select the data source you require. If you intend to use an Access 97 database then you should highlight **MS Access 97 Database** and click **OK** .
- You can also add other data sources, however this can be complicated - contact your network administrator or contact your local Zetafax distributor for assistance.
- Once you have selected the required data source you will be asked to select the database filename.
- Find the required database and click **OK**.
- Zetafax will now ask you to match up three columns in your ODBC table to the Zetafax addressing fields **Full name**, **Organization**, and **Fax number**.
- Attach the required table field to the relevant Zetafax one.
- Click **OK** once all three fields have been matched.

You will now be taken back to the **Zetafax Address book** dialog box. Your ODBC compliant database records will be listed and can be searched and selected in the same way as recipients in the Zetafax address book.

Note: Selected recipients will be automatically split into groups of 50. Each message line in your Zetafax Client will represent each group of 50 recipients.

Related topics
How do I use my address book?
How do I add to my address book?
Address books

Fax Relay

Fax Relay allows you to send faxes from fax machines and other multifunction devices which are sent using the Zetafax Server, this sends the fax more cost effectively and ensures that the fax is stored in the archive. Fax Relay can be used in three different ways, which can be combined as required in a single installation.

Anonymous sending

In this mode faxes are sent from the fax machine or multifunction device by entering just the fax number in the exact same way as before with a fax machine connected directly to a phone line. This enables users who do not have their own Zetafax user account to send faxes. The result is typically notified by a printed status page on the multifunction device printer or a nearby printer.

Sending by Zetafax users

For users setup on Zetafax they have the option to input their their ID (typically the last few digits of their DID fax number) followed by a separator (typically a star) at the start of the fax number. The fax is sent as if they had sent it from their Zetafax user account, including notification of the result and archiving.

Use as network scanner

Zetafax users can simply enter their ID on the fax machine instead of the fax number, the fax is then routed to their Zetafax account, from where the user can send the fax as usual. This is designed for users who want to scan a paper document to include with documents being faxed in environments where other network scanners are not available.

Related Topics:
Anonymous sending
Sending by Zetafax users
Use as network scanner

Anonymous Sending

Anonymous sending is designed for users who do not have a their own Zetafax account, a user wishing to send a fax enters just the fax number in the same way as sending with a conventionally connected fax machine, and includes a fax coverpage with the fax pages to be sent if required. The fax will then be passed to the Zetafax Server and be processed as normal.

When the fax has been sent, the Zetafax Server prints a status page. Where the fax machine is part of a multi-function device (MFD) then this will be printed on the MFD printer itself; otherwise it will typically be printed on a nearby printer. The status page gives the fax number and the status, and includes the first page of the fax to help with identification.

Note: Users with a Zetafax Account should send using their Zetafax users ID as this will ensure the fax is added to their outbox.

Related Topics:
Sending by Zetafax users
Use as network scanner

Send from Zetafax User

This method of using fax relay enables those with their own Zetafax account to send a fax from a suitably configured fax machine or multifunction device to do so from their Zetafax account. This will then be sent from their DID number and appear in their outbox as if they had sent it from the Zetafax Client.

Sending from a Zetafax User account from a fax machine
The user simply enters their ID plus a separator character (typically a star) before the fax number. For systems using direct dial (DID) routing for received faxes the user ID will typically be the user's 3 or 4 digit DID fax number.

For example, a user with direct dial fax number 222 333 4444 wishing to send a fax to number 234 567 8900 might enter the following fax number on the fax machine:
4444*2345678900

Most fax machines allow preprogrammed numbers to be combined when sending a fax. On such devices the user ID of frequent users could be stored in a set of preprogrammed keys, and entered by pressing the key for the user before the key for the recipient fax number.

Related Topics:
Anonymous sending
Use as network scanner

Use as a Network Scanner

This method of using fax relay enables those with their own Zetafax account who do not have access to a personal or network scanner to scan a document by sending it as a fax to themselves, by entering their own Zetafax user ID instead of the fax number.

For example, a user with direct dial fax number 222 333 4444 wishing to send a fax to themselves might enter the following fax number on the fax machine:
4444
The received fax will be delivered to their Zetafax Client Inbox or their email Inbox, depending on their user settings for receiving incoming faxes. It can then be resent by fax, including adding a coversheet or other documents as required.

Fax machines are usually configured to add a header line to sent faxes including the date and time of sending and other identification information. This forms part of the received fax image, so would be included when resending the fax in addition to any header line added by the Zetafax Server. The Zetafax Viewer includes annotation tools which could be used to remove this header information if required. Alternatively, organisations using fax machines primarily as network scanners with Zetafax may choose to disable the header line in the fax machine settings – most fax machines allow this.

Related Topics:
Anonymous sending
Sending by Zetafax users

Zetafax advanced tasks

The following topics describe how to perform advanced tasks with the Zetafax Client:

[Archive my messages?](#)
[Scan a document?](#)
[Create a coversheet?](#)
[Create a continuation page?](#)
[Use mail merge and Zetafax?](#)
[Check for updates?](#)
[Sign a fax before forwarding?](#)

How do I archive my messages?

You can archive messages you have received to a folder on your hard disk by using the following simple procedure:

- Create a folder for the archived faxes; for example you could call it **My faxes**.
- Select it in the **Folder List** window.

This will display its contents in the List view and Preview Pane.

To archive a received message

- Select the message you want to archive in the **Inbox** window. On the **File** menu, click **Save As**.
- The **Save As** dialog box will be displayed to allow you to save the fax with a specified filename, and with the option of saving the transmission report with the fax:

- If necessary, edit the filename to give the fax a unique name.
- Select **Save transmission report** to save a copy of the transmission report with the fax.
- Enter a description of the fax to help you identify it at a later date.
- Click the **Save** button to save the fax.

The fax will be displayed in the List view and Preview Pane in the folder you created.

- The fax will automatically be deleted from the **Inbox** window.

To archive a sent message

- Select the message you want to archive in the **Outbox** or **Sent Items** window. On the **File** menu, click **Save As**.

- The **Save As** dialog box will be displayed to allow you to choose what information you archive.

Since you probably have an original document for the sent fax, the **Save As** dialog box gives you the option of saving just the transmission report instead of the complete fax image file.

- Select **Save transmission report only**.

- Give the fax a unique filename.

- If required, edit the **Description** field to help you identify the fax at a later date.

- Click the **Save** button to save the fax.

How do I scan a document?

If you have a suitable scanning device you can scan in letterheads, coversheets, and graphics for inclusion in a fax.

Zetafax can also be used with a network attached scanning device, such as the Hewlett Packard Digital Sender.

To set up the default Zetafax Client TWAIN scanner
- Got to the **Options** tab in the Zetafax client and click **Select Source**.

To specify whether or not you want Zetafax to use the scanner's own software user interface when scanning click **Scan Options**.

To scan the document
- On the **Message** tab menu, click **New Item** and then **Scan**.

If you are using a client TWAIN scanner, the document will be scanned a page at a time. You will be asked whether you would like to stretch/shrink each image to fax size if it is substantially different in resolution from a fax page. The **Zetafax Fax Wizard Recipients** dialog box will then be displayed to allow you to address the message and send it as a fax.

Any document which has been scanned earlier using another application and saved as a graphics file may be sent as a fax directly by dragging it from Windows Explorer and dropping it on the Zetafax main window.

Configuring your Scanner to work directly with Zetafax
It is possible to adjust your computers response to a command given to your scanner such as pressing the scan button. By adjusting these button events it is possible to enable the scanner to open Zetafax by default upon scanning an item, alternatively you can set the scanner to prompt the user for the program they wish to process the scanned item with.

To adjust the settings of a scanner already installed on the computer please follow the steps below, if the scanner has yet to be installed on the machine please follow the manufacturer's instructions before referring to the instructions set out below.

- Open the **Start Menu** and select the **Control Panel.**
- Select the **Scanners and Cameras** option.
- Select the scanner you wish to consider from the list of available devices and select **Properties.**
- Select the **Events** Tab.
- From the **Select an event** drop down box choose the event you wish to configure Zetafax to work with, such as on pressing the scan button or any other programmable button.
- From the Actions section select one of the options below.
  - o **Start this Program**: If you wish Zetafax to open upon the event specified, e.g. pressing the scan button, select Zetafax from this list.(note: you will need to have opened the Zetafax Client at least once prior to this for the Zetafax option to be represented in this list.)
  - o **Prompt for which program to run**: This allows the user to specify the program to run from a list upon the event specified.
  - o **Take no action.**
- Select the **OK** button to make your changes.

Using a Scanner with Zetafax

If you have set the scanner event to run Zetafax then upon the event, e.g. pressing the scan button, Zetafax will open, if Zetafax is already open and button is pressed the scanning options will be displayed. Once scanned the document will be passed to the Zetafax fax wizard where it can be processed as normal.

How do I create a coversheet?

Personalized coversheets can help your business identity. Allowing you to increase awareness of your corporate branding without incurring any extra costs.

Note: Coversheet creation can only be done by users that have **Administrator** status.

Coversheet Creation is done in two stages. This allows you to add both background data such as images, lines and words that you do not intend to change on a fax to fax basis and also foreground data such as fax addresses, names and dates that will differ for each fax.

Create the coversheet background file

- Open Word.
- Add your corporate logos, and design the layout for the background of your coversheet.
- Print your document to the **Zetafax Printer.**

The **Zetafax Client** will open and the **Fax Wizard - Welcome** dialog box will be displayed.

- Select the **Save as an attachment or other system file** option.
- Click **Next**.

The **Save As** dialogue will be displayed:

- Choose the **Coversheet, letterhead or attachment file** option.
- Select the **Coversheet background - optional** checkbox.
- Provide a name for your Coversheet within the **File name** text box.
- Add a description in the **Description** text box.
- Select the **OK** button to save the background of your coversheet.

- Select Yes to add variable fields to your fax form.

Create the coversheet foreground file

- On the **Tools** tab, click **Coversheet Editor**.
- Open the coversheet you wish to modify, or select **New** to create a blank coversheet or use one of the standard coversheet templates.

Add a text field

Adding a text field allows you to add information to your coversheet that is going to remain the same between faxes.

- Click on the **Insert Text** button:

· Choose where on you fax you would like this information to appear, and click the left button on your mouse.

· Type the text you want to add.

Add a merge field
Adding a merge field to your coversheet allows you to add fields that will personalize your coversheet.

· Click on the **Insert Field** button:

The Field menu will be displayed:

· Select the field you would like to add to the coversheet.

· Choose where on you fax you would like this information to appear, and click the left button on your mouse.

Your field is now added to your coversheet.

Insert a line
One or more lines can be added to your coversheet to separate sections.

· Click on the **Insert Line** button:

· Draw your line by holding down the left button on your mouse and moving the mouse till you get a line of the desired size.

Your line is now added to your coversheet.

Insert a box
Boxes can be added to your coversheet to allow information such as any notes you may wish to be add to be separated from the rest of the information on the coversheet.

· Click on the **Insert Box** button:

· Draw your box by holding down the left button on your mouse and moving the mouse till you get a box of the desired size.

Your box is now added to your coversheet.

Editing your coversheet
Having added fields to your coversheet, these can be edited using the **Coversheet Editor** at anytime.

Having loaded the coversheet you wish to edit into the **Coversheet Editor** you can:

Edit text

Any text fields added to your coversheet can be changed by selecting them with you left mouse button. This will move your cursor to the field and allow you to add, delete or change text as required.

Format text
By clicking the right button of your mouse over any text or fax field, you will be given options to edit the formatting of that text. You can:

- Change the font.
- Edit the text or change the fax field.
- Justify the text or fax field.
- Delete the item.

If you choose to change the font, the following menu will be displayed:

This allows you to change the appearance of your selected text.

Move fields
All fields can be moved by selecting them with you left mouse button and either dragging them or using the arrow keys on your keyboard.

Change line thickness
For both lines and boxes that have been added you can change the thickness of lines by clicking the right button of your mouse on the object and selecting the **Properties** option. This will provide you with a **Properties** menu for that item, allowing you to change the line thickness. In addition, you can add a shadow to any boxes you might have added.

Saving your Coversheet
Having created a coversheet you are happy with, simply select the **Save As** option from the **File** menu and provide a name and description of your coversheet. You can now use your coversheet the next time that you send a fax.

How do I create a coversheet continuation page?

A coversheet continuation page is used when the amount of text that you have added to your coversheet is too large. As standard there is a default coversheet continuation page, that will be applied to all coversheets, however by following the procedure below you can either customize this page or add different continuation pages for different coversheets.

Editing the default coversheet continuation page

Use Coversheet editor to create the coversheet continuation page. Save the page as DEFAULT.

Once you have saved the coversheet follow the steps below:

- On the Zetafax server system browse to the \Zfax\SYSTEM\Z-COVER folder.
- This folder will contain all files for the coversheets that you have created, and one list control file named MSGDIR.CTL. Below is an example of a directory listing.

Template <DIR>
CoversheetA.g3f
CoversheetA.epn
DEFAULT.g3f
DEFAULT.epn
Msgdir.ctl

- Rename both DEFAULT files to:

DEFAULT.2.g3f
DEFAULT.2.epn

- Move both files to the template directory
- Restart the Zetafax Server

Creating a specific coversheet continuation page

Use Coversheet editor to create the coversheet continuation page. Save the page with a name you will recognize.

Once you have saved the coversheet follow the steps below:

- On the Zetafax server system browse to the \Zfax\SYSTEM\Z-COVER folder.
- This folder will contain all files for the coversheets that you have created, and one list control file named MSGDIR.CTL. Below is an example of a directory listing.

```
Template <DIR>
CoversheetA.g3f
CoversheetA.epn
CoversheetB.g3f
CoversheetB.epn
Msgdir.ctl
```

- To turn these files into one coversheet of two pages, you need to rename the CoversheetB files using the following convention:

```
Template <DIR>
CoversheetA.g3f
CoversheetA.epn
CoversheetA .2.g3f
CoversheetA.2.epn
```

```
Msgdir.ctl
```

Note: The additional coversheet should have the same name as the primary coversheet with the addition of a .2 before the extension.

- CoversheetA, is now the first page of the coversheet, CoversheetA.2 is the second page of the coversheet.

- Open the Msgdir.ctl using notepad; it will contain something similar the following entries.

```
[ZETAFAX]
Type: LibDir
Revision: A
[DIRECTORY]
File: CoversheetA "Coversheet"
File: CoversheetB "Coversheet second page"
```

- The entries need to be edited as below to remove the reference to the second page:

```
[ZETAFAX]
Type: LibDir
Revision: A
[DIRECTORY]
File: CoversheetA "Coversheet"
```

- After you have made these changes, save the files and exit from notepad.

- Restart the Zetafax server.

To verify the update has been successful

Start up the Zetafax Client and submit a fax with enough notes on the coversheet so that it will use the second page you have created. You can also test it by sending a fax via the email gateway.

The first page of the coversheet will be CoversheetA, and subsequent pages will be CoversheetA.2. (Note: faxes must be sent in plain text format when sending from the email gateway).

Use mail merge and Zetafax?

The easiest way to send out personalized faxes to multiple sources is to create your mail merge template within Microsoft Word and import your data from an excel spreadsheet. By adding embedded commands to your document, small fax shots can be created that will send specific information to every client.

Creating your mail merge template

*   Open Microsoft Word ® .

*   Start a new document, and add the text you wish to fax, along with fields you would like to change for each fax (for example: <name> and <date>).

*   Ensure the Mail Merge Toolbar is shown (right click your mouse in the toolbar area and select the Mail Merge option).

*   Select a data source (icon looks like a table).

*   Browse to you excel spreadsheet of data and select the sheet that contains your information.

*   This will allow you to use Mail Merge Fields within the document.

*   Replace all the fields you have added to your document with merge fields using the insert merge fields option (6th from left).

*   Add Zetafax fields to the top of your document, for example:

        %%[TO:<fax no>,<recipientname>,<organisation>]
        %%[subject: Support contracts due for renewal]

*   Replace the fields with the relevant mail merge fields.

*   Add a blank line at the very end of the document and type in %%[SEND]. This is the command that instructs Zetafax to automatically send all the faxes.

Sending your mail merge with a coversheet

*   Ensure you have included the embedded command:

                %%[COVERSHEET: <coversheet>]

*   Change the field **<coversheet>** to the name of the coversheet you wish to add. For example:

                %%[COVERSHEET: MAILMERGE]

*   Select the **Merge to new document** option from the mail merge toolbar.

*   Print your new document to the Zetafax printer.

Sending your mail merge without a coversheet

*   Select the **Merge to new document** option from the mail merge toolbar.

*   Print your new document to the Zetafax printer.

How do I check for client updates?

If your administrator has enabled automatic client updates, the Zetafax Client will detect each new update when it is applied to your Server.

When a new update is available, the Zetafax Client will ask you if you wish to install it when the Client first started up.

- If you decide you would like to update your client, selecting the **Yes** option will close down your client and start the update process.

- If you select **No**, your Zetafax Client will start as usual and you will not be prompted again to install that update.

- If you want to update the client at a more convenient time select **Remind me later**, this will prompt you with the update the next time you restart the Zetafax Client.

- At any time whilst using the Zetafax Client, you can manually check for updates using the **Check for updates...** option located within the **Help** menu:

How do I sign a fax before forwarding?

Creating a signature
To create a signature file:

- Sign a piece of paper.

- Scan your signature into your computer using a scanner attached to your network.

- Ensure your signature is cropped to the correct size, and is saved as a bitmap (*.bmp).

- Save your bitmap to a location you can find it on your network.

Adding a signature to a fax for forwarding
To add a signature to a fax:

- Open your fax within the Zetafax Viewer.

- Using the annotation tool bar, select the **Picture** option.

- Select the location of your fax image where you would like your signature to appear, and left click your mouse.

The **Open** image dialog will appear.

- Browse to the location of your stored signature image.
- Double click the left button on your mouse to add your signature.

Manipulating your signature
If your signature is not in the correct location, is the incorrect size or transparency, you can correct this using the **Picture Properties** dialog.

To change the location:

- Use your mouse to select the signature image.
- Drag the image to the desired location.

To change the size or transparency of signature:

- Use your mouse to select the signature image.
- Using the Right click menu select **Properties**.

The **Picture Properties** dialog is displayed:

- To change the file that is being loaded us the **Browse (...)** button in the **File** section.
- To change the size of you image use the **Width** and **Height** scroll bars (if lock aspect ratio is checked, these will both change proportionally when you modify either one).
- To change the transparency of your signature use the **Transparency** bar.

Forwarding your fax
- Save your fax using the **Save** option.
- Select which method you would like use to forward your fax from the **Forward** menu.
- Select the pages you want to send.
- Add your recipient information and send your fax as usual.

How do I use Embedded Addressing

Like many fax packages, Zetafax has a Windows printer driver. Print from a Windows application, and a dialog box will pop-up asking you where the fax is to be sent. With the API this can be automated by including options such as the fax number in the document being printed. Zetafax will pick out the embedded addressing information and act upon it.

You can use embedded addressing to broadcast faxes from a database or using a word processor mail merge so each recipient's copy will be personalized.

The Zetafax Client program allows addressing instructions to be into documents using embedded commands:

How do I add embedded commands to my document?
Addressing Commands
Sending Commands
Other Commands

How do I add embedded commands to my document?

Embedded commands are pieces of information that can be processed by Zetafax if they are included in your document.

The embedded commands that can be used by Zetafax can be found on the **Insert tab** from the ribbon for Office 2007/2010 users, or on the toolbar for Offices 2003 users. These allow you to add stationery, and attachments directly from Word or Excel. Embedded commands must be included in the first page of the document you are sending.

- Choose the embedded command you wish to add to your document from the Zetafax command.
- If required, modify the command to replace any information enclosed in brackets '<' and '>'.

For example:

%%[Name:<insert recipient name here>]

Should be modified to:

%%[Name:Sam Smith]

- When you have added all the embedded commands you require, and your document is complete, send your document to Zetafax using the **Send to Zetafax** button.

Addressing Commands

Add a recipient name
Syntax

%%[Name: <insert recipient name here>]
This is the person you are sending the fax to.

Example

%%[Name: Sam Smith]

Fax
Syntax

%%[Fax: <insert fax number here>]
This is the recipient's fax number

Example

%%[Fax: 123 456 7890]

Organisation
Syntax

%%[Organisation: <insert organization name here>]

where organization is the recipient's company or organization.

Example

%%[Organisation: Smith and Sons]

Sending Commands

Send your fax
Syntax

%%[SEND]

Allows you to convert your document to a fax format, and send it automatically.

Example

%%[Send]

Preview your fax
Syntax

%%[Preview]

Allows you to hold your fax for preview in your inbox.

Example

%%[Preview]

ZETA*f*AX®

Other Commands

Add a Coversheet
Syntax

%%[COVERSHEET:: <type the name of your coversheet here>]

Allows you to add a coversheet to your document.

Example

%%[Coversheet: COVSHEET]

Add a Covernote
Syntax

%%[StartBodyText]
<type coversheet note here>
%%[EndBodyText]

Allows you to type in text in the body of the coversheet.

Example

%%[StartBodyText]
Please find attached file
%%[EndBodyText]

Add a Subjectline
Syntax

%%[SUBJECT: <type subject here>]

This is the subject of the fax.

Example

%%[Subject: About the new sales figures]

Add Time of sending
Syntax

%%[TIME: <insert time here>]

Specifies when the message is to be sent.

Example

%%[After: 99-03-01 18:00:00]

Add a Letterhead
Syntax

%%[LETTERHEAD: <type the name of your letterhead here>]

Allows you to add a letterhead to the first page of your document that will be added by Zetafax when you send your fax to a recipient.

Example

%%[Letterhead: LETTHEAD]

Set the Priority of your fax
Syntax

%%[PRIORITY: <insert URGENT, NORMAL or BACKGROUND>]

Allows you to choose the priority of your fax.

Example

%%[Priority: NORMAL]

Set the Quality of your fax
Syntax

%%[QUALITY: <insert DRAFT, NORMAL or HIGH>]

Allows you to choose the resolution of your fax.

Example

%%[Quality: NORMAL]

Add a Chargecode
Syntax

%%[CHARGE: <enter your charge code value>]

Allows you to add charge code information to your document that can be used by Zetafax to log which person or department has sent your fax

Example

%%[Charge: SALES]

Delete when completed
Syntax

%%[DELETE: delete] where delete is YES, OK or NO.

Specifies whether the fax should be deleted after sending. If delete is YES then the faxes are deleted after they have been sent (successful or failed). If delete is NO then the faxes are **not** deleted after they have been sent

Example

%%[Delete: YES]

Add your information

Syntax

%%[FROM: <enter your name here>]

Allows you to specify the name that will appear in the From field on your fax coversheet.

Example

%%[From: Jim Jones]

Zetafax Client

This section explains the **Zetafax Client** File menu, Ribbon options and status icons as well as the options available in the resulting dialogs.

Related topics
Ribbon options
Status icons

File menu

The **File** menu provides options for sending, scanning, and filing messages, as well as other options.

[Print](#)

[Save](#)

[Save As System File](#)

[Help](#)

[About](#)

[Check for Updates](#)

[Exit](#)

Print

Allows you to print faxes or fax graphic files. If an item is selected in the **Zetafax Client** window and **Print** is selected from the File menu then the **Print Fax** dialog box is displayed to allow you to print the item.

Save

Allows you to archive a fax message from the **Inbox** window or **Outbox** window, or save a copy of a file in the Folder List window. Saving a message automatically deletes it from the appropriate window.

To save a message from the Inbox or Folder List windows

- Selecting a message in the **Inbox** or **Folder List** windows and choosing **Save As** from the **File Menu** displays the **Save As** dialog box to allow you to specify a name for the message, and choose where to save it.
- Enter a filename for the message.
- Select **Save transmission report** to save the transmission report and an optional description in the same location as the message.

You can view the transmission report for a saved message using the **Info** command on the Message tab.

To save a message from the Outbox window

- As you usually have an original version of the messages in your **Outbox** window, such as a word processor document, selecting a message in the **Outbox** window and choosing **Save As** from the **File Menu** gives you the option of saving just the transmission report for the message.
- Enter a filename for the message.
- This defaults to the recipient.
- If you selected the **Save Image file** option choose **Save transmission report** to include the transmission report with the file and enter an optional description.
- You can display the transmission report and description for the message using the **Info** command on the Message tab.

Note: that you will not be allowed to save the message if it is waiting to be sent, and the following warning is displayed:

- Use **Delete** to delete it first, or wait until the message has been sent.

Save as System File

Allows you to reuse faxes or files from your **Inbox** , **Outbox** , or **Folder List** windows as a coversheet background, letterhead background, or attachment file.

· On selecting the **Save as System File** from the File menu Zetafax displays the **Save as System File** dialog box to allow you to specify the format in which to save the file.

The following options are available:

Option	Description
Coversheet foreground - containing embedded fields	Specifies that the fax should be saved as a coversheet foreground file.
Coversheet background - optional	Specifies that the fax should be saved as a coversheet background file.
Letterhead background - letterhead and continuation	Specifies that the fax should be saved as a letterhead and continuation file.
Private attachment file - for your private use	Specifies that the fax should be saved as a private attachment file.
Public attachment file - for use by everyone	Specifies that the fax should be saved for use by all users.

· Enter a filename and optional description, and click the **OK** button to save the file.

· If you are saving a message from the **Inbox** window, a warning is displayed to give you the option of deleting it. Click **Yes** button to delete the original message or the **No** button to leave it.

Help menu

On selecting the **Help** option from the File menu Zetafax displays this help file.

About

On selecting the About option from the File menu the About Zetafax window will appear.

This contains details on:
- The product version
- software Licence Details
- Software Assurance Details

How do I check for client updates?

If your administrator has enabled automatic client updates, the Zetafax Client will detect each new update when it is applied to your Server.

When a new update is available, the Zetafax Client will ask you if you wish to install it when the Client first started up.

- If you decide you would like to update your client, selecting the **Yes** option will close down your client and start the update process.
- If you select **No**, your Zetafax Client will start as usual and you will not be prompted again to install that update.
- If you want to update the client at a more convenient time select **Remind me later**, this will prompt you with the update the next time you restart the Zetafax Client.
- At any time whilst using the Zetafax Client, you can manually check for updates using the **Check for updates...** option located within the **File** menu:

Exit

Selecting Exit from the File menu closes the Zetafax Client.

Menu options

You access the main functions of the Zetafax Client from the Ribbon and toolbar.

Ribbon Options Description

Message	Provides options for sending and saving Messages, as well as scanning and other message oriented options.
Server	Contains the options relating to the Zetafax server such as logs, statuses and your address book.
Options	Provides access to a range of Zetafax options.
Tools	For launching other applications for use with the Zetafax Client.

Related topics

File menu
Message tab
Server tab
Options tab
Tools tab

Message Tab

The Message tab provides commands for sending and manipulating fax and text messages.

It is split into 6 groups:

New

New fax

New Item - Offers you the following options:

Send File

Scan

New Text Mesage

Actions

Delete

Rush

Hold

Release

Forward

Resend

Forward - Offers you the following options:

Forward to Zetafax User

Forward to Fax Number

Forward to Mobile Number

Forward to E-Mail

View

View

Info

Mark

Mark as Junk

Follow up - Offers you the following options:

Follow up

Complete

Mark as Read

Mark as Unread

Name of Sender

New Fax

- Select **New Fax** from the Messages tab. The **Zetafax Fax Wizard - Recipient** dialog is then displayed to allow you to address the fax.
- Enter a name, organization (optional), and the destination fax number.
- Click the **Next** button to continue.
- For more information about the addressing options, and using the address book, see How do I use my address book?
- The **Zetafax Fax Wizard - Coversheet** dialog then allows you to choose the coversheet, and add a subject for your fax.
- Click the **Next** button to continue.
- The **Zetafax Fax Wizard - Options** screen will appear allowing you to add a letterhead, and specify sending options.
- For more information about the options see How do I specify options when sending a fax?
- Click the **Finish** button to continue.
- Switch to the **Zetafax Client** window.
- The fax will appear in your **Outbox** window, and the icon in the **Status** column shows the status of the fax. For more information, see Status icons.

Send File

- Choose **New Item** on the Message tab and then **Send File**. This allows the sending of an existing graphics file to a fax number.
- Choose the relevant file and then click the **OK** button.
- The **FaxWizard - Recipients** dialog box is then displayed to allow you to address the fax.
- Enter a name, organization (optional), and the destination fax number:

- Click the **Next** button to continue.
- For more information about the addressing options, and using the address book, see How do I use my address book?
- The **Zetafax Fax Wizard – Coversheet** dialog then allows you to choose the coversheet, and add a subject for your fax.
- Click the **Next** button to continue.

- The **Zetafax – Options** dialog box then allows you to add a letterhead, and specify sending options:

- For simplicity leave all the options unchanged.
- For more information about the options see How do I specify options when sending a fax?
- Click the **Finish** button to continue.
- Switch to the **Zetafax Client** window.
- The fax will appear in your **Outbox** window, and the icon in the **Status** column shows the status of the fax. For more information, see Status icons.

Scan

Acquires an image from the currently selected TWAIN scanner, if present, and sends it as a fax attachment.

- Select **New Item** from the **Messages tab** and then **Scan.**
- The **Zetafax - Fax Wizard Recipients** dialog box is displayed to allow you to address the fax in the usual way.

How do I send a text message to a mobile phone?

- Start the Zetafax Client.
- Choose the **New Item** option from the Message tab and select **New Text Message.**
- The **Text Message - Addressing** dialog box is then displayed to allow you to address the text message.
- Enter a name, organization (optional), and the destination mobile number or select an existing contact from the Previous recipients list:

- Click the **Next** button to continue.
- For more information about the addressing options, and using the address book, see How do I use my address book?
- The **SMS Message** dialog box then allows you to type a message and specify sending options.

Text messages can only contain 160 characters. As you type the message you will see a counter update. This counter shows the number of remaining characters that a single message can contain.

- Choose **Send in single message** to limit the text to one message of maximum 160 characters.
- Choose **Send in multiple messages** to send the message in multiple message instalments to allow for more than 160 characters.
- When the message is ready press the **Next** button to send the message.
- The message will appear in your Outnox window, and the icon in the Status column shows the status of the message. For more information, see Status_icons.

Delete

Deletes the selected message from the **Inbox** window or **Outbox** window, or deletes a file from the **Folder List** window.

- Selecting an unsent message in the **Outbox** window and choosing **Delete** from the Messages tab displays the following warning to allow you to confirm that you want to abort the message:

- Click the **Yes** button to abort the message or the **No** button to leave it in the **Outbox** window.
- Selecting a message that has already been sent and choosing **Delete** deletes it without warning.
- Selecting a message in the **Inbox** window and choosing **Delete** displays a warning to allow you to confirm that you want to delete the message.
- Selecting a message or file in the **Folder List** window and choosing **Delete** displays a warning to allow you to choose whether to delete the transmission reports as well as the document.

Rush

Selecting the **Rush** button from the Messages tab, moves the selected message in the **Outbox** window to the top of the list of messages waiting to be sent.

Hold

Selecting the **Rush** button from the Messages tab, puts the message selected in the **Outbox** window on hold, preventing it from being sent until released.

Held messages are displayed with a held status indicator in the **Outbox** window.

If the message is being held for preview, once it is ready for preview it will be marked by this icon.

Related topics
Status icons

Release

Selecting the **Release** button from the Messages tab, releases the message selected in the **Outbox** window, allowing it to be sent.

Resend

Resend is used when a fax or text message has been sent, but was not successfully delivered to some of the recipients. Resending a message will send the message again to all failed recipients.

- Select the message in question and on the Message tab click **Resend**.
- The **Zetafax - Fax Wizard Recipients** dialog box is then displayed to allow you to address the fax.

  The failed recipients will be entered into the recipient list.
- Click the **Next** button to continue to send the message.

For more information, see Status icons.

Forward To Zetafax User

Forwards an item selected in the Zetafax Client window to one or more specified Zetafax users.

For example if you received a fax intended for another user you can use the **Forward** command to forward it from your Zetafax **Inbox** window.

- On the Message tab select **Forward** and then the **Forward to Zetafax User** option.
- The **Forward Message** dialog box is displayed:

- Select the users you want to forward the message to and click the **OK** button to continue.
- If you forwarded a message from your **Inbox** window Zetafax displays a warning to give you the option of deleting it when it has been successfully forwarded.
- Click the **Yes** button to delete the message or the **No** button to leave the original in your **Inbox** window.

Forward To Fax Number

- Select a fax and right click your mouse to display an options menu.
- Choose **Forward > To Fax Number**, this will display the **Zetafax Fax Wizard - Recipients** dialog. Alternatively select the Forward option from the Message tab.
- Enter a name, organization (optional), and the destination fax number.
- Click the **Next** button to continue.
- For more information about the addressing options, and using the address book, see How do I use my address book?
- The **Zetafax Fax Wizard - Coversheet** dialog then allows you to choose the coversheet, and add a subject for your fax.
- Click the **Next** button to continue.
- The **Zetafax Fax Wizard - Options** screen allows you to add a letterhead, and specify sending options.
- For simplicity leave all the options unchanged, for more information about the options see How do I specify options when sending a fax?
- Click the **Finish** button to continue.
- Switch to the **Zetafax Client** window.

The fax will appear in your **Outbox** window, and the icon in the **Status** column shows the status of the fax. For more information, see Status icons.

Forward To Mobile Number

- Choose **Forward-> Forward To Mobile Number** from the Message tab.
- The **Text Message - Addressing** dialog box is then displayed to allow you to address the text message.
- Enter a name, organization (optional), and the destination mobile number or select an existing contact from the Previous recipients list.
- Click the **Next** button to continue.

For more information about the addressing options, and using the address book, see How do I use my address book?

The **SMS Message** dialog box then allows you to type a message and specify sending options.

Text messages can only contain 160 characters. As you type the message you will see a counter update. This counter shows the number of remaining characters that a single message can contain.

- Choose **Send in single message** to limit the text to one message of maximum 160 characters.
- Choose **Send in multiple messages** to send the message in multiple message instalments to allow for more than 160 characters.
- When the message is ready press the **Next** button to send the message.

The message will appear in your Outbox window, and the icon in the Status column shows the status of the message. For more information, see Status icons.

Forward To Mail

Allows a fax or text message to be forwarded via email. This displays the standard mail addressing dialog box. When forwarding a fax, the fax image will be added as an attachment.

- Select the Fax in question and on the Message tab select **Forward** and then the **Forward to Mail** option.
- This will open your standard mail addressing dialog with the fax message added as an attachment.

View

Displays the message selected. Equivalent to double-clicking the item. If no item is selected in the **Zetafax Client** window the **View Fax** dialog box is displayed to allow you to select a file for viewing.

Viewing a fax in the **Outbox** window that was held for previewing gives you the option of sending or aborting the fax when you exit from the Zetafax Viewer.
Once you have viewed it, you will be asked if you want to release it for sending.

Viewing an unread message in the **Inbox** window changes its status to read.

Information

Displays information about the item selected in the **Inbox** or **Outbox** windows. To display the information simply select the fax and then the **Info** option from the Message tab.

If the item is a received message, the **Message Information** dialog box displays the filename, description (if supplied), and transmission reports.

If the item is a sent message, the **Message Information** dialog box shows the filename, description, and additional information specified when the message was sent, together with the transmission reports, the number of pages sent, and the connection time.

- Selecting the **To...** button displays a dialog box listing all the desired recipients for the message, with the method contact for each (eg FAX/SMS plus fax/mobile number). The current status of each entry is displayed, ie. whether the transmission was successful, still in progress or failed.
- Selecting the **Log...** button displays a dialog box listing logged entries for the current fax message.

Information may only be kept for a few days; this length of time is defined by the fax server's configuration options.

- Selecting the **Print...** button allows you to print the logged information.

Managing Junk Messages

Marking messages as Junk

- To mark message senders as junk, simply right-click on a single fax in your Inbox and select **Mark as Junk** from the pop-up menu.
- The following dialog is displayed:

- Enter the Organisation, i.e. name that you wish to associate with the Sender ID (fax number) and press **OK**. An Inbox rule is automatically created that will route all further messages to you from the specified Sender ID to 'junk'.
- This rule can be viewed along with your other rules by selecting **Inbox Rules** from the **Options Tab**.

Follow up

Marks a selected message with a flag to be identified as a message needing follow up.

- This can be achieved by selecting a fax and **right clicking** onto it and selecting **Follow up.**
- Alternatively you can select a fax and then select the **Follow-up** option from the Message tab.

Complete

Removes the flag from a message mark as needing follow up.

- This can be achieved by selecting a fax and **right clicking** onto it and selecting **Complete.**
- Alternatively you can select a fax and then select the **Follow-up -> Complete** option from the Message tab.

Mark as read

Changes the status of a selected message to read.

- This can be achieved by selecting a fax and **right clicking** onto it and selecting **Mark as read.**
- Alternatively you can select a fax and then select the **Follow-up -> Mark as read** option from the Message tab.

Mark as unread

Changes the status of a selected message to unread.

- This can be achieved by selecting a fax and **right clicking** onto it and selecting **Mark as unread.**
- Alternatively you can select a fax and then select the **Follow-up -> Mark as unread** option from the Message tab.

Name of Sender

Displays the **Name Of Sender** dialog box to allow you to specify the organization associated with a fax selected in the **Inbox** window:

The organization will be displayed in the **From** column of the **Inbox** window instead of the sender's fax number.

Server

The Server tab provides commands for managing your address book and monitoring the Zetafax Server.

It is split into 3 groups:

Zetafax Server

Status

Logs

Reconnect

Search

Sent Items

Archive - Offers you the following options:

Sent Archive

Received Archive

Address Book

Search

New Entry

New Group

Server status

Displays the **Server Status** dialog box showing information about the status of faxes currently queued for sending and the available devices.

The user can abort and rush messages by highlighting an item in the **Sending** window and selecting the appropriate button.

Note: Only users with Zetafax Administrator status can abort or rush another user's faxes. The user can select the **Refresh** button to update the queue and device information.

Related topic
Queue manager

Logs

Zetafax allows you to view events logged on the Zetafax server. The Logs option form the Server tab allows you to select which logged messages to display.

- Select the **Logs** option from the **Server tab** to open the Server Logs window.
- Select **Messages Sent** or **Messages Received/Scanned** to display log entries for the corresponding types of messages.
- Select **Devices** or **Programs** , and choose a device or program from the corresponding drop-down menu, to display all entries for the corresponding item.
- Select **Everything** to display log entries for all categories.
- Select a user name from the **For Username** drop-down menu, or **All displayed entries** for all users.
- Deselect **Today only** to display all log entries.

Selection criteria

Selection of log entries uses three criteria – entry type, recorded username, and time. Entry type is selected simply by clicking any one of the entry types available on the Zetafax server logs window. If selecting entries logged from a particular device or program, this is selected in the usual way from a box.

If you have administrator privileges, you can search for logged messages for any given user, or all users of the system. Select the user from the **For Username** drop-down menu.

Otherwise users can only search for their own messages.

Time of logging can be selected for today only or all days logged. The **Today only** box should be checked if only today's messages are required. The number of days that daily logs are kept is specified by the network administrator, and could be many days, creating a very long list.

Log format

The format of log messages displayed is very simple – the time in 24 hour format (military time) followed by the actual error or Zetafax server message. Often they also contain the username and temporary file name involved in the action that created the message. Clicking on a message displays the server program which generated it, the user and message ID it refers to, and an explanation of the error (if applicable).

To show log entries for a specific message

- Select an entry for the appropriate message and click the **This message...** button.

The log entries will be filtered to show only those entries that apply to the selected message.

Related topic
FAX.LOG

Reconnect

If, during usage of Zetafax, the title changes to **Zetafax - offline**, this means the Zetafax server has been disconnected for some reason. This will affect most of the operations of the Zetafax Client software.

When this happens, all options that require contact with the Zetafax server are grayed out on the menus and cannot be chosen until the Zetafax server is reconnected. The **Reconnect** command and the server tab becomes available, and allows you to reconnect immediately. Alternatively, the Zetafax Client program may reconnect automatically a minute or so after the Zetafax server is restarted or the link to it is restored.

If, when you try to reconnect, you still get the message **Problem accessing Zetafax server** , the problem may not have been fixed properly, or there may be another problem. Ask your network administrator for assistance.

Search Sent Items

Displays the Search Sent Items dialog box. This allows you to perform a search for messages that you have sent and are stored in the Sent Items folder. The Sent Items folder differs from the Sent Archive in that it only reflects the Sent Items of the user currently logged into Zetafax. When sending a batch or faxes please note that only one fax needs to succeed for the batch to appear in the sent items folder.

To search for sent faxes:

*   Select the **Server** tab and then **Sent Items**.
*   The **Search Sent Items** dialog box is displayed:

Search criteria

It is possible search the Sent Items folder using a number of criteria to filter the search results generated.

- **Date range**: Today, Yesterday, In last week (last 7 days), In last month (since same date in previous month), None or Specified date range.
- If you choose **Specified date range**, you will be presented with the **Select date range** dialog box:

- If the **To** and **From** options are disabled, select the tick boxes to enable and choose the date range from the calendar by clicking on the down arrow. Click OK to confirm the date range.

Name: This is the name of the recipient.

Organization: This is the name of the company.

Recipient Fax or SMS: This is the recipient's fax number or mobile number.

These options are available when you click on the **Advanced** button:

File: This is the filename of any attachment sent and applies to faxes sent using 'print to fax'.

Message: This is the unique identifier for the message in the sent items folder

Charge Code: The charge code for this message.

- Fill in the appropriate criteria. Although not all fields are mandatory, if you provide more information, you will get a more accurate result. Click **OK** to search.
- You will be presented with a dialog box showing the search progress. You can cancel the search by clicking on cancel at any time.

- Your search results will be displayed in the Search Results pane as they are found, and if you had canceled the search, you will still see the results found up to the point when you clicked cancel. You can double-click on each fax message to open it in the Zetafax Viewer.

- You can always go back to your last search results by clicking on Search Results under Sent Archive found in the Folder List.

Search sent archive...

Displays the Search Sent Archive dialog box. This allows you to perform a search for messages that you have sent and are stored in the Sent Archive folder.

Note: This option is only available if you have a sent archive folder where all your sent faxes are stored. Otherwise the search option would not be available.

To search for faxes sent:

- Select the **Server** tab and then **Archive->Sent Archive**.
- The **Search Sent Archive** dialog box is displayed:

Search criteria

- **Date range**: Today, Yesterday, In last week (last 7 days), In last month (since same date in previous month), None or Specified date range.

- If you choose **Specified date range**, you will be presented with the **Select date range** dialog box:

- If the **To** and **From** options are disabled, select the tick boxes to enable and choose the date range from the calendar by clicking on the down arrow. Click OK to confirm the date range.

Sending Zetafax user: choose the user who sent the fax messages from the drop down menu.

Name: This is the name of the recipient.

Organization: This is the name of the company.

Recipient Fax or SMS: This is the recipient's fax number or mobile number.

These options are available when you click on the **Advanced** button:

File: This is the filename of any attachment sent and applies to faxes sent using 'print to fax'.

Message: This is the unique identifier for the message in the archive

Charge Code: The charge code for this message.

- Fill in the appropriate criteria. Although not all fields are mandatory, if you provide more information, you will get a more accurate result. Click **OK** to search.

- You will be presented with a dialog box showing the search progress. You can cancel the search by clicking on cancel at any time.

- Your search results will be displayed in the Search Results pane as they are found, and if you had canceled the search, you will still see the results found up to the point when you clicked cancel. You can double-click on each fax message to open it in the Zetafax Viewer.

- You can always go back to your last search results by clicking on Search Results under Sent Archive found in the Folder List.

Search received archive...

Displays the Search Received Archive dialog box. This allows you to perform a search for messages that you have received and are stored in the Received Archive folder.

Note: This option is only available if you have a received archive folder where all your received faxes are stored. Otherwise the search option would not be available.

To search for faxes received:

- Select the **Server** tab and then **Archive->Sent Archive**.
- The **Search Received Archive** dialog box is displayed:

Search criteria

- **Date range**: Today, Yesterday, In last week (last 7 days), In last month (in the last 31 days), None or Specified date range.
- If you choose **Specified date range**, you will be presented with the **Select date range** dialog box:

If the **To** and **From** options are disabled, select the tick boxes to enable and choose the date range from the calendar by clicking on the down arrow. Click OK to confirm the date range.

Receiving Zetafax user: choose the Receiving Zetafax user from the drop down menu

Sender Fax or SMS: This is the sender's fax number or mobile number

Message: This is the unique identifier for the message in the archive. This option is available when you click on the **Advanced** button.

- Fill in the appropriate criteria. Although not all fields are mandatory, if you provide more information, you will get a more accurate result. Click **OK** to search.
- You will be presented with a dialog box showing the search progress. You can cancel the search by clicking on cancel at any time.

- Your search results will be displayed in the Search Results pane as they are found, and if you had canceled the search, you will still see the results found up to the point when you clicked cancel. You can double-click on each fax message to open it in the Zetafax Viewer.

- You can always go back to your last search results by clicking on Search Results under Sent Archive found in the Folder List.
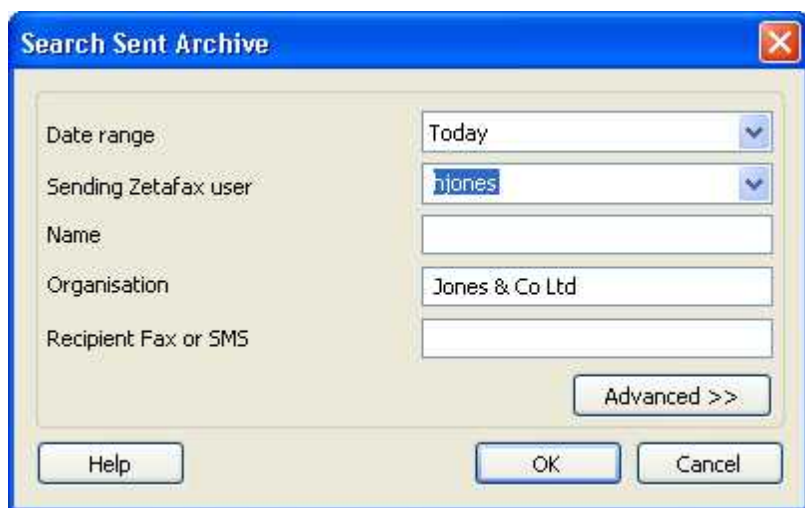
Search

Allows you to search the network and private address books for a particular entry, add new entries, and edit or delete existing entries.

To search for an entry

- Selecting the Search option from the Server tab displays the Address Book Search window.
- Use the **Data source** drop-down menu to specify which address books you want to search.

   Zetafax network address book

   Zetafax private address book

   Zetafax network and private address books

- Type the first few letters of the name you want to search for.
- The list of entries will be scrolled to the first entry matching what you typed.

To edit an entry

- Select the entry in the **Address Book Search** dialog box and click the **Edit.** button, or double-click the entry.
- The entry will be displayed in the **Address Book Editor** dialog box.
- Edit the entry as required and click the **OK** button to save the changes.

To delete an entry

- Select the entry in the **Address Book Search** dialog box and click the **Delete.** button.
- A dialog box is displayed to allow you to confirm that you want to delete the entry.
- Click the **Yes** button to delete the entry or the **No** button to cancel the operation.

To add a new entry to an address book

- Click the **New...** button.

Then proceed as for a New Entry.

New Entry

Allows you to add a new entry to the private or network address book.

- To create a New Entry in your address book simply go to the **Server** tab and select **New Entry**.
- The **Address Book Editor** dialog box is displayed to allow you to enter the contact details.

- Enter the name, organization, and fax number in the appropriate fields.
- Select **Private** or **Network** to specify whether the entry should be added to your private address book, or the network address book accessible by all Zetafax users in your company.
- Click the **OK** button to add the entry.
- A dialog box will confirm that the entry was successfully added.
- Click the **OK** button to continue.
- The **Address Book Editor** dialog box remains open to allow you to add further entries.
- Click the **Quit** button to close the **Address Book Editor** dialog box.

To print an entry from the address book

- Select the entry in the **Address Book Search** dialog box and click the **Print...** button.
- The **Print Address Book** dialog box will be displayed to allow you to print the selected entry.
- In the **Report format** section select **Standard** to print just the name, company, and fax number, or **Full details** to print the full name and address details defined in the **Address Book Editor - More Details** dialog box.

To add more details to an address book entry

- From the **Address Book Editor** dialog box click the **More...** button.
- The **Address Book Editor - More Details** dialog box will be displayed to allow you add an address to the entry, together with information about how you want the recipient addressed on faxes, and additional company information

New Group

Zetafax allows you to define address book groups, which make it easy to send one fax to a number of people or organizations.

Each group can contain up to 50 individuals, or references to other groups.

Groups are identified by an @ prefix in front of their name.

Groups can be stored in either the private address book or network address book.

To create a group

- On the **Server** tab, click **New Group**.
- The **Group Edit** dialog box is displayed to allow you to define the group.
- Specify a name for the group. Select **Private** or **Network** to specify which address book to use for the group.
- Enter a description of the group in the **Description** field.
- Select each entry you want to add to the group by typing the first few letters of its name, selecting the entry in the list, and then clicking the **Add to list** button.

Note: That if you add another group to the group, that group should not itself contain any groups.

- When you have specified all the members for the group:
- Click the **Add** button to create the group.
- A dialog box will confirm that the group was created successfully.
- Click the **OK** button on the dialog box to return to the **Group Edit** window.
- Click the **Quit** button to close the **Group Edit** window.

To edit a group

- On the Server tab, click **Search**.
- In the **Address Book Search** dialog box select **Search by Group**.
- The list of the available groups will be displayed.
- You can then add a new group, or edit or delete an existing group, in exactly the same way as for other address book entries.

To send a fax to all members of a group

In the **Zetafax Fax Wizard Recipients** dialog box click the **Address book.** button to display the **Address Book** dialog box.

- Select **Search by Group**.
- Select the group you want to use in the list of entries and click the **Add to list** button.
- Click the **OK** button to close the **Address Book** dialog box.

The group name and description will be displayed in the **List of recipients** box, followed by the individual recipients in the group:

>   @Committee Steering committee members
> Joe Black, Runbolds (01234 56768)
> Susan Smith, Smith and Sons (0321 6547)
> Eileen Morris, Steelsen (09876 5432)

- Click the **OK** button to send the fax.

Note: When sending a message to a group of recipients only one entry will appear in your **Outbox** window.

Options

The commands on the **Options tab** allow you to configure options affecting the operation of the Zetafax Client to suit your preferences and the way in which you prefer to work.

It is split into 5 groups:

Message Options

Fax Options

Coversheet Details

Text Message

Scanners

Scanner Options

Select Source

Rules

Inbox rules

Alerts

Program Settings

Customize

Annotation

OCR

Window

Refresh

Folder - Offers you the following options:

Select Folder

Change File Filter

Folder List

Status Bar

Reset Layout

Fax Options

Displays the **Fax Message Options** dialog box shown here to allow you to specify default settings for new messages. To display the **Fax Message Options** dialog box simply go to the **Options** tab and select **Fax Message.**

Message Options

Keep transmission reports

- Select **Keep transmission reports** to store a transmission report containing information about the recipients and time of sending in the same directory as each document.

Coversheet

Displays the **Options - Coversheet** dialog box to allow you to select the default coversheet file to be used for faxes.

- Select the coversheet file from the **Coversheet** drop-down menu, or **(None)** for no coversheet.

Letterhead

Displays the **Options - Letterhead** dialog box to allow you to select a letterhead file for use on each of the subsequent pages of the fax.

- Select the letterhead file from the **Letterhead** drop-down menu, or **(None)** for no letterhead.

Resolution

Displays the **Options - Resolution** dialog box to allow you to specify the default resolution for faxes - **Draft**, **Normal**, or **High**.

Priority

Allows you to specify the default priority - **Normal**, **Urgent**, or **Background**.

- You can only select **Urgent** if the network administrator has permitted you to do this.
- **Urgent** faxes are sent ahead of any **Normal** faxes in the Zetafax Server queue.
- **Background** faxes are sent when no other faxes are queued.

Time

Specifies the default time for faxes to be sent:

- Immediately
- Off-peak
- At a specified time

Note: When specifying a time, you can only select a time to send within the next 24 hours.

Header

Displays the **Options - Page Header** dialog box to allow you to specify what information is displayed in the header on each page:

- Numbered
- To
- From
- Date
- Time

Click the **Reset** button to enable all options.

Save Sent Faxes in the Sent Items Folder

The save sent faxes checkbox allows you to determine whether or not you wish faxes that have been successfully sent to be saved into the sent items folder. Un-checking this will result in your sent faxes not being stored in the sent items folder.

Delete Sent Faxes from Outbox

The Delete Sent Faxes from Outbox checkbox allows you to determine whether or not you wish faxes that have been successfully sent to be deleted from the Outbox folder. Checking this will result in your sent faxes being deleted from the Outbox, note these will not be moved to the Recycle Bin and are permanently deleted.

Mail send options

Allows you to specify the format in which messages sent to email addresses are received.

Coversheet Details

The **Coversheet Details** button on the **Options tab** displays the Fax Coversheet Details dialog which allows you to specify the details that will be displayed on the fax coversheet.

Options are:

- Full name
- Telephone number
- Fax number
- Email address
- Other (for example, your company's URL or product descriptor)

Text Message Options

To view the **Text Message Options** select the **Options** tab and select the **Text Message option**, the Text Message Options dialog box will open to allow you to specify default settings for new text messages:

- The **Header** lets you specify a default message header.
- The **Signature** lets you specify a default message signature. On first use this field is set to your full name.

Save Sent Messages in the Sent Items Folder

The Save sent messages in Sent Items folder checkbox allows you to determine whether or not text messages are saved in the Sent Items Folder.

Delete Sent messages from Outbox

The Delete Sent messages from Outbox checkbox allows you to determine whether or not you wish text messages that have been successfully sent to be deleted from the Outbox folder. Checking this will result in your sent text messages being deleted from the Outbox, note these will not be moved to the Recycle Bin and are permanently deleted.

Scanner Options

The **Scanner Options** button on the **Options tab** displays the **Devices** dialog box to allow you to specify options affecting connected scanners.

Scanner Options

- Select **Invert TWAIN images** to invert scanned images (as in a negative) when they are imported into a fax.

- Select **Show scanner user interface** to use the scanner's own software user interface when scanning.

Select Source

The **Select Source** button on the **Options tab** displays the **Select Source** dialog box to allow you to select a scanner from the list of currently installed scanners.

Inbox Rules

Creating Inbox Rules

The Zetafax Client provides you with the ability to create Inbox Rules, allowing you to manage your messages more effectively. From the **Options tab**, select the **Inbox Rules** option. The following dialog is displayed:

The main portion of the dialog displays a list of your currently configured rules. Each of the rules specified is applied to any new messages that are received into your Inbox. Users should note that the rules created

here are specific to the Zetafax account that was used to log on to the Zetafax Client. The Inbox Rules created here are not applied to Groups. Rules that apply to Group Inboxes must be created through the Zetafax Configuration program. The fields listed in the above dialog are defined as follows:

Sender ID – Where the fax originated from. This is commonly the fax number of the remote fax sender.

Organisation – This is a user friendly name that you wish to associate with the Sender ID.

Forward To – This is the rule that will be applied to all further messages received from this Sender.

* To create a new Inbox Rule, click the **New** button. The following dialog is displayed:

* Using this dialog, you can enter the three pieces of information described above. For the **Forward To** option, you should select a value from the drop-down. Selecting **(JUNK)** will route any further messages received from this sender to the junk user. This is a special user managed by the Zetafax Administrator. They will choose how junk messages will be dealt with.
* When you have entered all the relevant information, click **Add** to create the rule. The rule now appears in your list.
* From the main dialog, you can also edit and delete existing rules.
* To edit a rule, select it from the list, and hit the **Edit** button.
* To delete a rule, select it from the list and hit **Delete**. You will be asked for confirmation before the rule is removed.

Alerts

The **Alerts** button on the **Options tab** displays the **Options - Alerts** dialog box to allow you to specify whether you want to be notified about different events.

Show alert message when:
Message received - Displays an alert when an incoming fax is received.
Group message received - Displays an alert when a message addressed to a group has been received.

This option is only available if a user account has been created for a group using Zetafax Configuration.
Preview ready - Displays an alert when a held fax is ready for previewing.
Message sent - Displays an alert when a message has been successfully sent.
Message failed - Displays an alert when a message being sent has failed.

Alert Style
Windows taskbar - Displays an alert in the Windows Taskbar.
Message box - Displays a message box alert.

Customize

The **Customize** button on the **Options tab** allows you to customize the Zetafax Client user interface, including the size and appearance of the toolbar buttons, the font used for each element of the user interface, and the behavior of the **Folder List** window.

Annotation

The **Fax Annotation** button on the **Options tab** displays the Fax Viewer Options dialog which allows you to specify an alternative viewer to be used for annotating faxes.

The **Viewer** menu will show a list of the available viewers on your computer.

- Select your chosen viewer from the **Viewer** drop-down menu, or choose **(other)** and specify the command line of the viewer in the **Command Line** field.

- Select **Use as default viewer** to use the specified viewer as the default viewer when viewing faxes in the **Zetafax Client** window.

Standard resolution faxes have a resolution of 200 x 100 dpi. However, some viewers do not handle graphics files correctly if the resolution is different in the x and y directions and will display these faxes vertically compressed. If this happens select the **Always convert to 200 x 200 dpi** option to ensure the faxes are displayed correctly.

Using annotation

If your viewer supports annotation it can be used to modify faxes in the **Inbox** window. For example, you could modify a received fax and then forward it to another user.

For more information, see Annotate.

OCR

The **OCR** button on the **Options tab** displays the OCR Options dialog box to allow you to set up a third-party OCR program for use with Zetafax, to allow you to convert received faxes into editable text files suitable for reading into a word processor.

Zetafax can be used with many leading third-party OCR products. Select the OCR program from the **Program** drop-down menu, or choose **(other)** and specify the command line for the program in the **Command line** field. If the OCR package does not support fax format graphics files, select an alternative format from the **File format** menu and Zetafax will automatically convert the file format so your OCR package can read it.

Example - Using Microsoft Office Tools Document Imaging for OCR

- Go to menu and select the **Options tab** and then **OCR**.
- When the OCR Options window opens select **Other** from the **Program** field, you will then need to specify the Command line for the program you wish to use
- In this case the path is:

> "C:\Program Files\Common Files\Microsoft Shared\MODI\12.0\mspview.exe"

- Whilst still in Inbox Folder select the message you wish to convert to text and select the **Tools tab and then OCR**.
- The selected OCR tool will activate.

Refresh

The **Refresh** button on the **Options tab** refreshes the **Inbox**, **Outbox**, and **Folder List** windows.

Folder

The **Select Folder** button on the **Options tab** displays the **Browse for Folder** dialog box to allow you to select a directory to be displayed in the **Folder List** window. Zetafax will remember which window has been selected and will automatically display this on startup.

Change File Filter

Selecting the **Folder** drop down option from the the **Options tab** and then selecting **Change File Filter** displays the Change File Filter dialog box. This allows you to filter which files are shown in the **Folder List**

window.

- Select **Show only files with transmission reports** to hide files without transmission reports. This is a good way of showing only fax files if your chosen directory also displays other file types.
- Enter a pattern in the **Match files of type** box to show files matching a specified extension.

For example: Put *.epn to show only files with a .epn extension. Put a*.* to show only files beginning with 'a'. Put *.g3* to show only files with a .g3f or .g3n extension; ie graphics files.

Folder List

The **Folder List** checkbox option on the **Options tab** determines whether the folders list is displayed in the Zetafax Client.

Status Bar

The **Status Bar** checkbox option on the **Options tab** determines whether the status bar appears at the bottom of the Zetafax Client window.

Reset Layout

The Reset Layout button on the **Options tab** resets the Zetafax Client screen layout to its original configuration.

Reset Layout

Tools

The commands on the **Tools** tab allows you to use other tools in conjunction with Zetafax to annotate faxes, or convert them to editable text (OCR), and create and edit coversheets.

Message

Annotate

Delete annotations

OCR

Name of Sender

Zetafax Viewer

Applications

Coversheet Editor

Tidy Up

Annotate

Using the Zetafax viewer, faxes received in your Inbox can be annotated and saved either for your records or to be forwarded to another person.

To annotate a fax

- Double click the fax you wish to add annotations to. The **Zetafax viewer** will automatically load the selected fax.

- Using the annotations toolbar, you can add your annotations to your selected fax:

Annotation type	Description
Straight line	Allows you to draw a straight line.
Freehand line	Allows you to draw a line in any direction.
Rectangle	Allows you to draw a rectangle.
Highlight	Allows you to shade a rectangle.
Text box	Allows you to add a box of text to your fax.
Picture	Allows to add images to your fax.
Stamp	Allows you to add a box of preset text to your fax.

Having added the annotations that you require, save your fax and exit the viewer.

To create a custom stamp

- Click the Stamp icon in the annotations toolbar and select **Add stamp.**
- The **New Stamp** dialog will be displayed.
- Enter a name for your stamp in the **New Stamp Name** field.
- This should be something descriptive, as this will be displayed as the stamp name within the **Zetafax viewer**.
- Add the text you wish to be displayed as part of your stamp into the **Stamp string**. For example:
  Received by Sam Smith

In addition to adding standard text, there are two smart commands you can use within your stamps:

Stamp Command	Description
%D%	Adds the date in the short standard Windows format, for example: 02/01/11.
%D%	Adds the date in the long standard Windows format, for example: January 01 2011.

- Select **OK** to save your stamp.

Delete annotations

The **Delete Annotations** option is accessed by selecting the **Tools tab** and then selecting the annotate drop down and then selecting **Delete Annotations.** This **d**eletes any annotations added to the fax selected in the **Inbox** window.

OCR

The **OCR** option on the **Tools** tab submits the fax selected in the **Inbox** window to a third-party OCR program to convert it into a text document suitable for editing in the word processor.

The command will only be available if a suitable OCR program has been set up in the OCR Options dialog.

Zetafax Viewer

Displays the **View Fax** dialog box to allow you to select a file and display it in the Zetafax Viewer. You can

open the viewer either by double clicking on the desired fax or by selecting the **Tools** tab and then the **Zetafax Viewer** option to display the selected fax.

Coversheet Editor

Runs the Zetafax Coversheet Editor to allow you to create a new coversheet or edit an existing coversheet. You can open the Coversheet editor by selecting the **Tools** tab and then the **Coversheet Editor** option.

Tidy Up

Displays the **Quick Tidy Options** dialog box which gives you a convenient way of clearing old messages from your **Inbox, Outbox and Sent Items** windows. You can open the Quick Tidy options by selecting the **Tools** tab and then the **Tidy-Up** button.

Select the different categories of messages you want to delete and abort. Specify the number of days after which you want to delete and abort the specified messages by editing the **days** field or clicking the up-arrow and down-arrow buttons.

Status icons

The files in the **Inbox** and **Outbox** windows are identified with the following status icons. These change to indicate the status of a fax:

Icon	Description
	Waiting for preparation or a free device.
	Message being prepared for sending.
	Document held in queue.
	Document ready for preview.
	Received document.
	Sending of fax message completed successfully.
	Sending of text message completed successfully.
	Sending or receiving of fax message completed with errors.
	Sending of text message completed with errors.
	Message being aborted.
	Saved file or attachment.
	Dialing remote fax or sending to local device.
	Sending to remote fax.
	Sending a text message to a mobile phone.
	Sending to remote Zetafax server by LCR.
	Remote Zetafax server accepted message by LCR.
	Message being received from remote fax or LAN.
	Document being scanned using fax server's scanner.
	Scanned message for attaching.

Keyboard Shortcuts

General Shortcuts

Shortcuts for general operations allow you to:

F1 Display Zetafax help. In dialog boxes, F1 displays help for a particular control.
F5 Refresh connection with sever.

New Message Options

Ctrl + S Compose new fax message.
Ctrl + T Compose new text message.

Selected Message Options

Ctrl + H Hold selected message.
Ctrl + L Release selected message.
Ctrl + R Rush selected message.
Ctrl + P Print selected message.
Ctrl + F Forward selected message to another user.
Ctrl + M Forward selected message via email.
Enter View message using the Zetafax Viewer.
Alt Enter View message information.
F7 Save selected message as an image file.
Del Delete selected message.

Zetafax Coversheet Editor

The Zetafax Coversheet Editor allows you to create and edit coversheets for use with your faxes. It allows you to import image files, such as a company logo, scale and position them, and add text and other fields.

Foreground and background files

For flexibility each coversheet consists of two files:

- Background file, containing fixed information such as a company logo.
- Foreground file, containing text specific to each fax, such as the name and organization.

The background file is optional and can be omitted if you include all the fixed information in the foreground file.

The foreground file is stored in .epn format. The background file is a graphics file with extension of .g3f for fine mode faxing or .g3n for normal mode faxing.

To run the Coversheet Editor

- On the Zetafax Client **Tools** menu, click **Coversheet Editor**.

To create a new coversheet

- On the **File** menu, click **New**.

The **New Coversheet** dialog box will be displayed to allow you to select one of the coversheet templates:

- Select **New blank coversheet** to display a blank page in the **Coversheet Editor** window and click the **OK** button.
- Select an alternative coversheet from the list to display a template in the **Coversheet Editor** window.

Related topics
Menu options
Toolbar

How do I create a coversheet?

Personalized coversheets can help your business identity. Allowing you to increase awareness of your corporate branding without incurring any extra costs.

Note: Coversheet creation can only be done by users that have **Administrator** status.

Coversheet Creation is done in two stages. This allows you to add both background data such as images, lines and words that you do not intend to change on a fax to fax basis and also foreground data such as fax addresses, names and dates that will differ for each fax.

Create the coversheet background file
- Open Word.
- Add your corporate logos, and design the layout for the background of your coversheet.
- Print your document to the **Zetafax Printer.**

The **Zetafax Client** will open and the **Fax Wizard – Welcome** dialog box will be displayed.

- Select the **Save as an attachment or other system file** option.
- Click **Next**.

The **Save As** dialogue will be displayed:

- Choose the **Coversheet, letterhead or attachment file** option.
- Select the **Coversheet background – optional** checkbox.
- Provide a name for your Coversheet within the **File name** text box.
- Add a description in the **Description** text box.
- Select the **OK** button to save the background of your coversheet.

- Select Yes to add variable fields to your fax form.

Create the coversheet foreground file
- On the **Tools** tab, click **Coversheet Editor**.
- Open the coversheet you wish to modify, or select **New** to create a blank coversheet or use one of the standard coversheet templates.

Add a text field
Adding a text field allows you to add information to your coversheet that is going to remain the same between faxes.

- Click on the **Insert Text** button:
- Choose where on you fax you would like this information to appear, and click the left button on your mouse.
- Type the text you want to add.

Add a merge field
Adding a merge field to your coversheet allows you to add fields that will personalize your coversheet.

- Click on the **Insert Field** button:

The Field menu will be displayed:

- Select the field you would like to add to the coversheet.
- Choose where on you fax you would like this information to appear, and click the left button on your mouse.

Your field is now added to your coversheet.

Insert a line
One or more lines can be added to your coversheet to separate sections.

- Click on the **Insert Line** button:
- Draw your line by holding down the left button on your mouse and moving the mouse till you get a line of the desired size.

Your line is now added to your coversheet.

Insert a box
Boxes can be added to your coversheet to allow information such as any notes you may wish to be add to be separated from the rest of the information on the coversheet.

- Click on the **Insert Box** button:
- Draw your box by holding down the left button on your mouse and moving the mouse till you get a box of the desired size.

Your box is now added to your coversheet.

Editing your coversheet
Having added fields to your coversheet, these can be edited using the **Coversheet Editor** at anytime.

Having loaded the coversheet you wish to edit into the **Coversheet Editor** you can:

Edit text
Any text fields added to your coversheet can be changed by selecting them with you left mouse button. This will move your cursor to the field and allow you to add, delete or change text as required.

Format text
By clicking the right button of your mouse over any text or fax field, you will be given options to edit the formatting of that text. You can:

- Change the font.
- Edit the text or change the fax field.
- Justify the text or fax field.
- Delete the item.

If you choose to change the font, the following menu will be displayed:

This allows you to change the appearance of your selected text.

Move fields
All fields can be moved by selecting them with you left mouse button and either dragging them or using the arrow keys on your keyboard.

Change line thickness
For both lines and boxes that have been added you can change the thickness of lines by clicking the right button of your mouse on the object and selecting the **Properties** option. This will provide you with a **Properties** menu for that item, allowing you to change the line thickness. In addition, you can add a shadow to any boxes you might have added.

Saving your Coversheet
Having created a coversheet you are happy with, simply select the **Save As** option from the **File** menu and provide a name and description of your coversheet. You can now use your coversheet the next time that you send a fax.

Menu options

File menu
Edit menu
View menu
Insert menu
Format menu
Options menu

File menu

The commands on the **File** menu allow you to create a new coversheet or open an existing coversheet, save and print coversheet files, and exit from the **Coversheet Editor**.

New
Open
Close
Save
Save As
Delete
Page Setup
Exit

New

Creates a new coversheet file.

The **New Coversheet** dialog box is displayed to allow you to select a coversheet template as the starting point for the coversheet, or **New blank coversheet** to start with a blank document.

Open

Displays the **Open Coversheet** dialog box to allow you to select an existing coversheet.

Close

Closes the coversheet, prompting you to save any changes first if necessary.

Save

Saves any changes you have made to the current coversheet.

Save As

Allows you to save the current coversheet with a different name.

Delete

Deletes the currently loaded coversheet from the Zetafax coversheet directory.

Page Setup

Displays the **Page Setup** dialog box to allow you to specify the paper size for the current coversheet.

Select **Set as default** to make the specified size the default size for new coversheets.

Exit

Exits from the Zetafax Coversheet Editor.

Edit menu

The **Edit** menu provide the standard Windows commands for use when editing coversheets:

Option	Description
Undo	Allows the most recent edit action to the currently open coversheet to be undone.
Cut	Copies the currently selected item to the clipboard and deletes it from the coversheet.
Copy	Copies the currently selected item to the clipboard.
Paste	Inserts an object from the clipboard into the current document.
Delete	Removes the currently selected object from the coversheet.

View menu

The commands on the **View** menu allow you to customize the **Zetafax Coversheet Editor** window, and switch between editing the foreground and background files in the coversheet.

- Select **Toolbar** and **Status bar** to determine whether the **Toolbar** and/or **Status bar** are displayed in the **Zetafax Coversheet Editor** window.
- Select **Fade Background** to show the background file grayed out when you are editing the foreground file and vice-versa. Select **Edit Background** to edit the background file instead of the foreground file.
- Select **1:1**, **Fit to Width**, or **Whole Page** to determine the scale of the coversheet displayed in the **Zetafax Coversheet Editor** window.

Insert menu

The options on the **Insert** menu allow you to insert a text object, field, line, box, or bitmap on the coversheet you are editing.

Text
Field
Line
Box
Bitmap

Text

Allows you to add a text box to the coversheet.

Selecting **Text** changes the cursor to an insertion pointer. Click where you want to add the text and type in the text.

After adding the text box you can move it with the mouse pointer, or edit the text by double-clicking it.
To change the appearance of the text, see Format menu.

Mark as read

Changes the status of a selected message to read.

Field

Allows you to add a field to the coversheet which will display custom text showing the addressee, subject, and other information supplied when the fax is sent. The **Field** dialog box is displayed to allow you to choose the information to be displayed:

- Click the **Recipient**, **Sender**, or **Other** tab to select the type of information you want to include.
- Select the field from the appropriate list and click the **OK** button to add it to the coversheet.
- Click on the coversheet to position the field.

The field is identified by the field name in angled brackets:

After adding the field you can move it with the mouse pointer, or edit the field by double-clicking it. To change the appearance of the field, see Format menu.

Line

Allows you to add a line to the coversheet. Drag to specify the start and end positions of the line.

You can then use the **Properties** option on the **Format** menu to specify the thickness of the line.

Box

Allows you to draw a box on the coversheet. Drag to define the size of the box.

You can then move the box by dragging to a new position or resize it by dragging one of the handles on the border of the box.

The **Properties** command on the **Format** menu allows you to specify the thickness of the box, and add a shadow.

Bitmap

Allows you to add a bitmap to the background of the coversheet.

If you are editing the foreground file the following dialog box is displayed to allow you to switch to the background file:

An **Open** dialog box is then displayed to allow you to select the bitmap to add to the background.

You can select a fax graphics file (.g3* or .tiff,) or a .bump file.

For best results choose a monochrome bitmap file.

Format menu

The options on the **Format** menu change depending on what kind of object is selected in the **Zetafax Coversheet Editor** window.

Text or Field

Provides **Font**, **Edit Text**, and **Justify** options to allow you to change the appearance of the text:

Font

Displays the **Font** dialog box to allow you to choose the typeface, style, size, and optionally underline the text.

A sample of the text is shown in the sample box:

Edit text

Allows you to edit the text in the text box. Alternatively as a shortcut double-click the text.

Justify

Allows you to choose **Left** or **Right** to determine the justification of the text in the text box.

Line

Allows you to specify the line thickness:

Box

Allows you to specify the appearance of the box:

Options menu

Provides options for creating special effects and configuring the settings of the coversheets.

Snap to grid
Effects
Settings

Snap to grid

Displays a rectangular grid in the background of the coversheet and snaps objects to the grid so that they automatically line up when you draw them.

Effects

Allows you to convert a bitmap to a watermark, greying it out so it appears as a faint tint in the background, or add a 3D shadow.

Settings

Allows you to choose the measurement units for the coversheet.

Toolbar

Provides buttons that directly access the most commonly used commands.

Icon Description

Creates a new coversheet, opening the **New Coversheet** dialog box. This command is equivalent to New (File menu).

Opens an existing coversheet stored on disc, opening the **Open Coversheet** dialog box. This command is equivalent to Open (File menu).

Saves the coversheet being edited under its current name, or if it is unnamed, first opens the **Save Coversheet** dialog box allowing it to be named. This command is equivalent to Save (File menu).

Cuts the selected objects to the clipboard. This command is equivalent to Cut (Edit menu).

Copies the selected objects to the clipboard. This command is equivalent to Copy (Edit menu).

Pastes the selected objects to the clipboard. This command is equivalent to Paste (Edit menu).

Inserts text objects in the foreground layer. This command is equivalent to Text (Insert menu).

Inserts a field object in the foreground layer, opening the **Field** dialog box allowing the type of field to be chosen. This command is equivalent to Field (Insert menu).

Inserts a line object in the foreground layer. This command is equivalent to Line (Insert menu).

Inserts a box object in the background layer. This command is equivalent to Box (Insert menu).

Inserts a bitmap in the background layer, opening the **Open** dialog box allowing the bitmap file to be chosen. This command is equivalent to Bitmap (Insert menu).

Turns **Edit background** mode on and off. This command is equivalent to Edit background (View menu).

Opens this Coversheet Editor Help. This command is equivalent to **Help Topics** (**Help** menu).

Keyboard Shortcuts

General Shortcuts

Shortcuts for general operations allow you to:

Ctrl + N   Create a new coversheet.
Ctrl + O   Open an existing coversheet.
Ctrl + S   Save a coversheet.
Ctrl + Z   Undo last command.
Ctrl + X   Cut selected item.
Ctrl + C   Copy selected item.
Ctrl + V   Paste selected item.

Zetafax Viewer

The Zetafax Viewer allows you to preview faxes prior to sending them, or view sent and received faxes. In addition, the Zetafax viewer allows you to annotate your faxes this allows you to add comments or highlight areas before sending a fax through to another user, or saving your fax for future reference.

To display a fax in the viewer

- Select the fax in the **Inbox**, **Outbox**, or **Folder List** windows.
- On the **Message** tab, click **View**.

Alternatively as a shortcut you can double-click the fax in the **Inbox**, **Outbox**, or **Folder List** window.

The fax will be displayed in the **Zetafax Viewer** window:

To scroll the fax in the Zetafax Viewer window:

- Drag the horizontal and vertical scroll bars, or drag the fax with the mouse pointer.

To view successive pages of the fax

· Either click the page number icons on the right-hand side of the **Zetafax Viewer** window, or click the **Next** and **Previous** buttons to step between pages.

Related topics
How to annotate a fax
Menu options
Standard toolbar
Annotation toolbar

File menu

The commands on the **File** menu allow you to print a fax from the viewer, import a page, or export a page in a selected graphics format.

Print

Save

Save As

Import

Export

Help

About

Exit

Print

The print option allows you to print a hard copy of pages from your fax. By selecting this option you can choose which printer to send your fax to, specify which pages you would like to print, and the number of copies of your fax you require.

To activate the print dialog, select either the **Print...** option from the **File** menu or using the shortcut key:

Ctrl + P

Save

Save
Saves the changes you have made to this
fax image.

The Save option allows you to save any changes to your fax. Such as pages that have been deleted and annotations that have been added.

To activate the Save dialog, select either the **Save** option from the **File** menu or using the shortcut key:

Ctrl + S

Note: The Save option will only be available if the fax has been saved to a location that is not your inbox or outbox. To save your changes, when the **Save** option is de-selected, use the Save As option.

Save As

Save as
Saves the changes you have made to this fax image to a different location.

The **Save As** option allows you to save a copy of your fax image, along with any changes you might have made, to a new location. This gives you the option to save changes such as pages that have been deleted and annotations that have been added.

To activate the Save dialog, select either the **Save** option from the **File** menu.

Import

The **Import** button on the **File menu** displays the **Import Page** dialog box to allow you to select another fax or image file and import pages from that file into the fax you are currently viewing.

When importing files, you can:

- Import pages after the page you are currently viewing, using the **Insert after** option
- Import pages before the page you are currently viewing, using the **Import before** option
- Import pages instead of the page you are viewing, using the **Replace current pages** option

These options are available on the **Import** dialog.

Export

The **Export** button on the **File menu** displays the **Export** dialog box to allow you to export the fax you are currently viewing.

Export
Allows you to choose the type of file you save your fax image as.

Exporting a page from your fax allows you to save a single page or a selection of pages from your document as a separate file. In addition, it allows you to change the format in which your fax image is stored.

This allows you to save core data without Coversheets or unwanted information.

Help

The **Help** options allow you to access this help file.

About

On selecting the **About** option from the File menu the About Zetafax window will appear.

This contains details on:
- The product version
- software Licence Details
- Software Assurance Details

Exit

Exits from the Zetafax Viewer.

If you are viewing a received fax in the **Inbox** window, exiting changes its status from **Unread** to **Read**.

If you are viewing a fax held for previewing in the **Outbox** window, exiting prompts you to release it for sending or aborting.

Ribbon options

There are many options that you can utilize from within the Zetafax Viewer, and the following tabs in the Ribbon allow you to access these commands:

View
Edit
Options

View

The options on the **View** tab allow you to choose which page of the fax to view and allows you to rotate the fax.

It is split into 4 groups:

Page

Next page

Previous page

First page

Last page

Zoom

Zoom in

Zoom out

Fit to width

Overview

Zoom

Rotate Page

Rotate left

Rotate right

Flip

Rotate All - Offers you the following options:

Rotate all left

Rotate all right

Flip all

Message

Forward

Next Fax

Previous Fax

Next Page

Allows you to move to the next page in your open fax. You can also navigate between pages by selecting

the appropriate page image in your thumbnail view.

Previous page

Allows you to move to the previous page in your open fax. You can also navigate between pages by selecting the appropriate page image in your thumbnail view.

First Page

Allow you to step directly to the first page of the fax. Especially useful if you have a large number of pages in your fax.

Last page

Allow you to step to the last page of the current fax. Especially useful if you have a large number of pages in your fax.

Zoom in

Changes the magnification of the fax image, allowing you to view the fax in more detail. This option can be used multiple times to increase the magnification level up to a maximum of 500%.

Zoom out

Changes the magnification of the fax image, allowing you to view the fax in less detail. This option can be used multiple times to decrease the magnification level up to a minimum of 15%.

Fit to width

Changes the magnification of the fax image, allowing you to view the fax at a magnification that sizes it exactly to the width of the viewing pane. This option is the default view, and can be used to view a summary of each selected page.

Overview

Changes the magnification of the fax image, allowing you to view the full fax in viewing pane. This option is the can be used to view a summary of each selected page.

Zoom Options

Selecting **Zoom** on the **View** tab allows you to select from a variety of Zoom levels.

Full size (100%)
25%
50%
75%
150%
200%
500%

Full size (100%)

This allows you to see your fax at full size. This may appear larger than you are expecting, as fax images that are stored at high resolution will be compressed before being printed.

25%

This allows you to see your fax at 25% of it's full size. This may appear larger than you are expecting, as fax images that are stored at high resolution will be compressed before being printed.

50%

This allows you to see your fax at 50% of it's full size. This may appear larger than you are expecting, as fax images that are stored at high resolution will be compressed before being printed.

75%

This allows you to see your fax at 75% of it's full size. This may appear larger than you are expecting, as fax images that are stored at high resolution will be compressed before being printed.

150%

This allows you to see your fax at 150% of it's full size. This may appear larger than you are expecting, as fax images that are stored at high resolution will be compressed before being printed.

200%

This allows you to see your fax at 200% of it's full size. This may appear larger than you are expecting, as fax images that are stored at high resolution will be compressed before being printed.

500%

This allows you to see your fax at 500% of it's full size. This may appear larger than you are expecting, as

fax images that are stored at high resolution will be compressed before being printed.

Rotate left

Rotates the selected page of fax through 90° left to allow you to view a fax.

Rotate right

Rotates the selected page of the fax through 90° right to allow you to view a fax.

Flip

Rotates the selected page of the fax through 180° to allow you to view a fax that was received inverted.

Rotate all left

Rotates all pages of the fax message through 90° left to allow you to view a fax.

Rotate all right

Rotates all pages of the fax message through 90° right to allow you to view a fax.

Flip all

Rotates all pages of the fax message through 180° to allow you to view a fax.

Forward

The **Forward option** allows you to select between two options, Forward to Zetafax User and Forward to Fax Number.

For every type of recipient, you will get a dialog that allows you to specify if you would like to send:

- All - the full fax
- The current page - the page currently being viewed
- Pages: - a selection of pages from the current fax.

Once you have selected which pages you wish to send, the selection will be sent to the Zetafax Client for addressing and sending.

To Zetafax user
To fax number

To Zetafax user

Allows you to forward the fax that you are currently viewing to another Zetafax user on your system.

To fax number

Allows you to forward the fax that you are currently viewing to a fax number.

Next Fax

Loads the fax that was sent or received directly after the fax that is being viewed.

Using this option and the **Previous Fax** option, you can navigate between faxes in either your **Inbox** or **Outbox** allowing you to find the fax you are searching for.

Previous Fax

Loads the fax that was sent or received directly before the fax that is being viewed.

Using this option and the **Next Fax** option, you can navigate between faxes in either your **Inbox** or **Outbox** allowing you to find the fax you are searching for.

Edit

The commands on the **Edit** tab allow you to do the following:

It is split into 3 groups:

Edit

Undo

Cut

Copy

Paste

Annotate

Tools

Stamp

Select

Font

Delete

Page

Move page up

Move page down

Delete page

Undo

Allows you to undo the last action that has been performed on a fax within the Zetafax Viewer.

For example, if you have added an annotation such as a text box, using the **Undo** command will remove the text box.

Using the **Undo** command will delete actions in the reverse order to that in which they have been applied to your fax.

Cut

Copies the currently selected item to the clipboard and deletes it from the fax.

Copy

Copies the currently selected item to the clipboard.

Paste

Inserts an object from the clipboard into the current document.

Annotate

The Annotate option allows you to perform the following actions on your faxes:

Straight Line

Pencil/Freehand Line

Rectangle

Highlight

Text Box

Picture

Stamp

- Approved
- Draft
- Received
- Rejected
- User stamps
- Add stamp
- Manage stamp

Straight line

The straight line annotation, allows you to add straight lines to your fax image. This helps you to underline key points in your fax.

Once a straight line has been added to your fax, you can change the appearance of the straight line using the **Properties** option:

This dialog allows you to vary the color of the line you have drawn (black, grey and white only) and the width of your line.

Pencil/Freehand line

The Pencil/Freehand line annotation, allows you to add freehand lines to your fax image. This helps you to highlight key areas of your fax.

Once a Pencil/Freehand line has been added to your fax, you can change the appearance of the Pencil/Freehand line using the **Properties** option:

This dialog allows you to vary the color of the line you have drawn (black, grey and white only) and the width of your line.

Rectangle

The Rectangle annotation, allows you to add a transparent rectangle, with a border of lines to your fax image. This helps you to highlight key areas of your fax.

Once a Rectangle has been added to your fax, you can change the appearance of the Rectangle using the **Properties** option:

This dialog allows you to vary the color of the line you have drawn (black, grey and white only) and the width of your line.

Highlight

The Highlight annotation, allows you to add a filled rectangle, without a border of lines to your fax image. This helps you to highlight key areas of your fax.

Once a Highlight has been added to your fax, you can change the appearance of the Highlight using the **Properties** option:

This dialog allows you to vary the fill color of the Highlight you have drawn (black, grey and white only) and the transparency of your Highlighted area.

Text Box

The Text box annotation, allows you to a rectangle with text into your fax image. This helps you to add comments to your fax.

Once a Text box has been added to your fax, you can change the appearance of the Text box using the **Properties** option:

This dialog allows you to vary the color and transparency of the rectangle you have drawn (black, grey and white only).

All text that you add can be modified using either the **Format** menu or toolbar:

Simply highlight the text you wish to change and modify the options.

Picture

The Picture option allows you to add images in the following formats to your fax:

- *.g3f
- *.g3n
- *.g3s
- *.bmp
- *.tif

This allows you to add signatures, and other images to your fax message.

To do this, you must select the **Picture** option, and select the size and position of your image by dragging your mouse on the page. This will activate the file selection dialog. Browse to your image file, and select **OK** to add the image.

To modify your picture, select the **Properties** dialog:

From here, you can browse to another image file, resize your image, and choose the transparency level of your image.

Stamp

The **Stamp** option allows you manage the stamps held on your system.

A Stamp is a set piece of text that can be applied to your stamps. Existing stamps allow you to set common text that you may like to apply to a fax, for example the date it was received. In addition you can

Approved

Draft

Received

Rejected

User stamps

Add stamp

Manage stamp

Approved Stamp

This Stamp can be added to show that the contents of the fax is ready to be sent out, or that the fax has been approved prior to being sent.

Draft Stamp

This Stamp can be added to show that the contents of the fax is not ready to be sent out, or that the fax has been created to be approved prior to being sent.

Received Stamp

This Stamp can be added to show that the fax has been received.

Rejected Stamp

This Stamp can be added to show that the fax has been rejected.

User Stamp

This option lists all the custom stamps that you have created. This allows you to use these stamps within your fax.

Add Stamp

Allows you to create your own stamps to be stored for use on all faxes that are loaded into the Zetafax Viewer.

In addition to adding standard text, there are two smart commands you can use within your stamps:

Stamp Command	Description
%D%	Adds the date in the short standard Windows format, for example: 02/01/06.
%DD%	Adds the date in the long standard Widows format, for example: January 01 2006.

Manage Stamp

Allows you to modify your stamps that are stored for use on all faxes that are loaded into the Zetafax Viewer.

Select Annotation

Allows you to select an annotation to allow you to edit or delete it.

Note: This command is only applicable to annotations that have no been saved.

Font

This allows you to change the **Font**, **Style** and **Size** of text that you have added to text boxes.

Delete

The **Delete** option on the Edit tab allows you to delete some or all of the annotations that have been applied to the fax.

Delete annotation

Remove all annotations

Delete Annotation

Allows you to delete the annotation that has been selected.

Note: This command is only applicable to annotations that have no been saved.

Remove all annotation

Allows you to delete all the annotations.

Note: This command is only applicable to annotations that have no been saved.

Move page down

Moves the current page down a position in the document. This allows you to rearrange the pages of your fax.

Move page up

Moves the current page up a position in the document. This allows you to rearrange the pages of your fax.

Delete page

Removes the current page of the document.

Options

The Options tab allows you to use the **Toolbars** and **Thumbnails** options, you can customize the look and feel of the Zetafax Viewer allowing you to add and remove features as and when you require them.

It is split into 2 groups:

Toolbars

[Toolbars](#)

Layout

[Thumbnails](#)

Toolbars

Allow you to choose which toolbars are displayed, within the Zetafax Viewer. This allows you to display the toolbars that you wish to use on a regular basis.

Thumbnails

Allow you to preview all the pages of your fax in a small preview window to the side of your currently displayed page. It also allows you to navigate to a different page of your fax by selecting the correct page within the thumbnail view and using your left mouse button to select it.

Keyboard Shortcuts

General Shortcuts

Shortcuts for general operations allow you to perform tasks quickly from within the Zetafax Viewer. The following list shows all the available shortcuts:

Shortcut keys	Action
Ctrl + P	Print selected fax.
Ctrl + G	Go to a specific page.
Ctrl + B	Previous fax.
Ctrl + N	Next fax.
Ctrl + S	Save.
Esc	Escape.
Page Up	Next page
Page Down	Previous page
Home	First page
End	Last page

Annotation toolbar

Provides buttons that allow you to annotate your fax message.

Icon	Description
	Select Allows you to select any of the annotations you have made and edit or delete it.
	Properties Allows you to change the properties of an annotation.
	Straight line Allows you to draw a straight line.
	Freehand line Allows you to draw a line in any direction.
	Rectangle Allows you to draw a rectangle.
	Highlight Allows you to shade a rectangle.
	Text box Allows you to add a box of text to your fax.
	Picture Allows you to add an image to your fax.
	Stamp Allows you to add a box of preset text to your fax.
	Remove all annotations Removes all unsaved annotations from your fax image.

Hints and tips

Integration with Microsoft Office and Outlook

Zetafax addins allow you to send faxes directly from Microsoft Office Applications such as Microsoft Word, Excel, PowerPoint and Outlook.

Zetafax Word and Excel addins
Zetafax Word and Excel Addins are automatically installed as part of the Zetafax Client Applications Express install, if you already have Word and Excel on your computer.

Zetafax Word and Excel Addins allow you to send faxes from Word and Excel. In addition, you can also add automation commands (fax addressing, add coversheet, add letterhead, preview fax) to your document which will be used when you send it with Zetafax.

For more information please see Integration with Microsoft Office

Zetafax Outlook addin
Zetafax Outlook Addins are installed through the Custom Install type.

Zetafax Outlook Addin, allows you to send faxes from Outlook. Your can preview your fax before you send it to a recipient.

For **Outlook 2003 users** only: you can send your fax to another person for approval before you send it to a recipient.

There are two methods of sending a fax to a recipient via the Zetafax Outlook Addin, you can either:
- Send a fax via the specific fax form, which only allows fax addresses
- Send a fax as a standard Outlook message, this allows you to send the same message as both email and fax, and you can access fax numbers from your Outlook contact list.

As the Zetafax Outlook Addin links to your Zetafax server, you can add coversheets, letterheads and attachments to your fax message that are stored on your local system.

For more information please see Integration with Microsoft Outlook

Integration with Microsoft Office

If you have chosen to install Zetafax addins, you have the option of sending your current document directly to the Zetafax printer, speeding-up the process of sending a fax.

Whilst you may use the **Print** command on the **File** menu to fax from Microsoft Office applications, this requires you to select the Zetafax fax printer and then restore the original printer before you can use it again. Click on the topics below for more information on how you can use Zetafax without having to change the printer settings:

Integration with Microsoft Office 2003
Integration with Microsoft Outlook 2007/2010/2013
Print to Zetafax from applications

Integration with Microsoft Office 2003

The Zetafax toolbar button provides Zetafax addins for Microsoft Word, Excel and Powerpoint.

Installing the Microsoft Office addins

When you install Zetafax Client Applications using the **Complete** set-up type, the addins are automatically installed if you have Microsoft Office already on your computer. If you do not have Microsoft Office, then the addins are not installed.

Or if you choose **Custom** set-up type, you can select **Microsoft Office Addins** from the list of program features.

Using a Word or Excel addin

Once you have finished creating your document in Word or Excel, you can send your document to Zetafax to add coversheets, letterheads and information about your recipients.

The Word, PowerPoint or Excel addins operate in a common fashion. Each provides two ways of sending the current document as a fax:

• You can either click **Send to** from **File** menu and then click **Zetafax...** as shown below:

- Or you can click the Zetafax printer button on the toolbar.

If you have not already logged in to the Zetafax Client and Server, you will be prompted to do so. Once you have logged in, the **Fax wizard- Welcome** dialog box, is displayed.

If you are using Windows 2000, the dialog box may be hidden under other windows.

- Click on the Taskbar icon to bring it to the front.

For more information about the Fax Wizard options please see Print to Zetafax from applications

For more information on how to send a fax please see How do I send a fax and How to send multiple documents as a single message

You can also add automation commands (fax addressing, add coversheet, add letterhead, preview fax) to your document which will be used when you send it with Zetafax. The **embedded** commands are found on the Zetafax toolbar, within **Add Commands.** Click **fax command** and click on the commands that you wish to add to your document.

For more information please see Embedded Addressing.

Uninstalling the Zetafax Word addin

- If Word is already running, on the **File** menu, click **Exit** to exit the program.
- Open a Windows Explorer window, browse to the Microsoft Office folder (by default C:\Program Files \Microsoft Office), and from there to the **Office\Startup** subfolder, and then delete the **Zetafax.dot** file:

The uninstallation is now complete.

Uninstalling the Zetafax PowerPoint addin

- Launch PowerPoint.
- On the **Tools** menu, click **Add-ins**.
- In the **Add-ins** dialog box that appears, select the Zetafax item and then click **Remove**.
- Click **Close**.

The uninstallation is now complete.

Uninstalling the Zetafax Excel addin

- Launch Excel.
- On the **Tools** menu, click **Add-ins...**.
- In the **Add-ins** dialog box that appears, uncheck the **Zetafax**.
- Click **OK**.

The uninstallation is now complete.

Integration with Microsoft Office 2007/2010

Please select your version of Office:
- Integration with Microsoft Office 2007
- Integration with Microsoft Office 2010

Integration with Microsoft Office 2010

The Zetafax toolbar button provides Zetafax addins for Microsoft Word and Excel only.

Installing the Word and Excel addins

When you install Zetafax Client Applications using the **Complete** set-up type, the addins are automatically installed if you have Microsoft Office already on your computer. If you do not have Microsoft Office, then the addins are not installed.
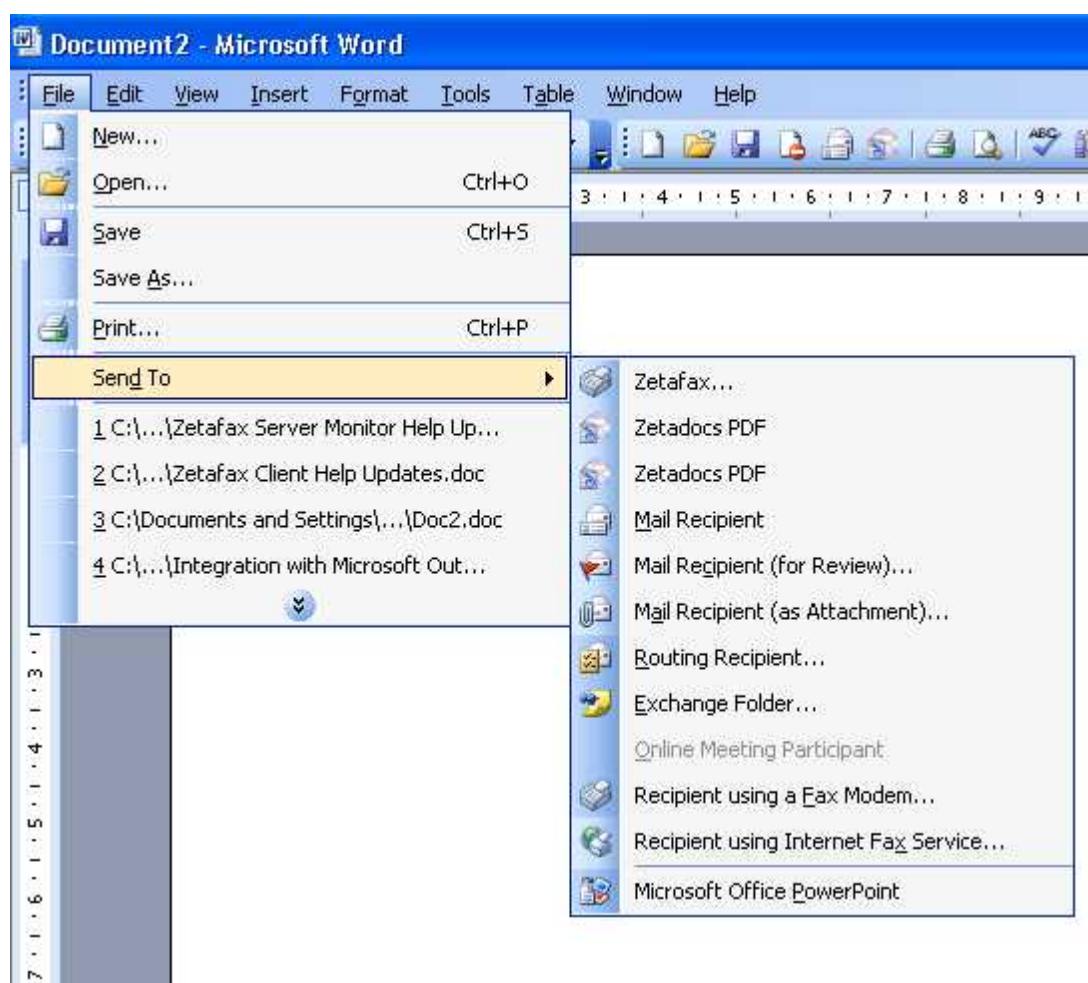
Alternatively if you choose **Custom** set-up type, you can select **Microsoft Office Addins** from the list of program features.

Using a Word or Excel addin

Once you have finished creating your document in Word or Excel, you can send your document to Zetafax to add coversheets, letterheads and information about your recipients. The Word or Excel addins operate in a common fashion.

- Click on the **File tab** from the ribbon, click **Share** and select **Fax using Zetafax.** If you have not already logged in to the Zetafax Client and Server, you will be prompted to log in.

Once you have logged in, the **Fax wizard- Welcome** dialog box is displayed.

For more information about the Fax Wizard options please see Print to Zetafax from applications

For more information on how to send a fax please see How do I send a fax and Send multiple documents as a single message?

You can also add automation commands (fax addressing, add coversheet, add letterhead, preview fax) to your document which will be used when you send it with Zetafax. The **embedded** commands are found within the **Insert tab** on the ribbon menu.

For more information please see Embedded Addressing

Removing the Word add-in

- Launch **Word**.
- Click the **File tab**, click on **Word Options** at the bottom of the menu.
- This brings up the **Word Options** dialog box.
- Click **Add-Ins** on the Left hand side
- Select **Zetadocs and Zetafax Addin**
- In the **Manage** field, select **COM Add-Ins** from the drop down menu and click the **Go..** button.
- This brings up the **COM Add-Ins** dialog box where you will find the that the **Zetadocs and Zetafax Addin** is selected.
- To remove the **Zetadocs and Zetafax Addin,** click the **Remove** button.
- Click **OK.**

Removing the Excel add-in

- Launch **Excel**.
- Click the **File tab**, click on **Excel Options** at the bottom of the menu, next to **Exit**.
- This brings up the **Excel Options** dialog box.
- Click **Add-Ins** on the left hand side
- Select **Zetadocs and Zetafax Addin**
- In the **Manage** field, select **COM Add-Ins** from the drop down menu and click the **Go..** button.
- This brings up the **COM Add-Ins** dialog box where you will find the that the **Zetadocs and Zetafax Addin** is selected.
- To remove the **Zetadocs and Zetafax Addin,** click the **Remove** button.
- Click **OK.**

Integration with Microsoft Office 2007

The Zetafax toolbar button provides Zetafax addins for Microsoft Word and Excel only.
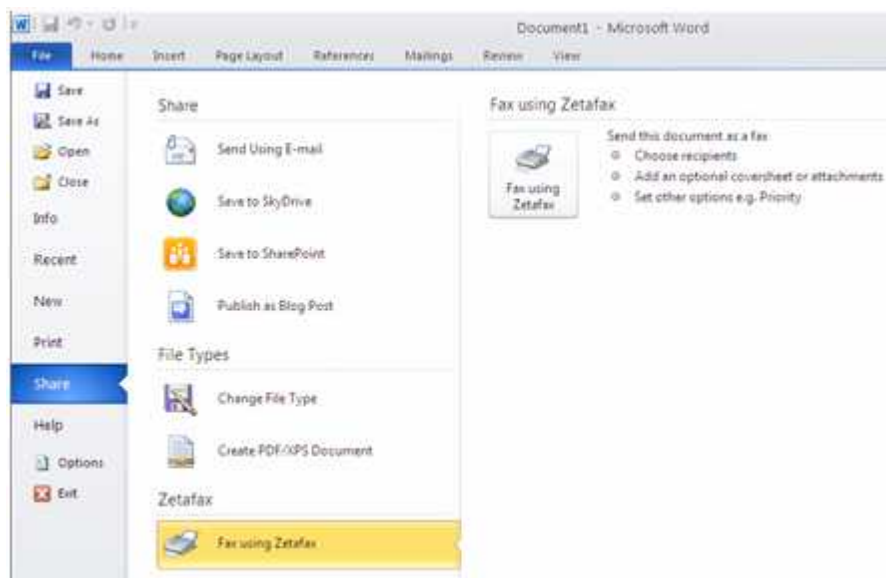
Installing the Word and Excel addins

When you install Zetafax Client Applications using the **Complete** set-up type, the addins are automatically installed if you have Microsoft Office already on your computer. If you do not have Microsoft Office, then the addins are not installed.

Or if you choose **Custom** set-up type, you can select **Microsoft Office Addins** from the list of program features.

Using a Word or Excel addin

Once you have finished creating your document in Word or Excel, you can send your document to Zetafax to add coversheets, letterheads and information about your recipients. The Word or Excel addins operate in a common fashion.

- Click the **Office Button**, click **Send** and select **send to Zetafax.** If you have not already logged in to the Zetafax Client and Server, you will be prompted to log in.

Once you have logged in, the **Fax wizard– Welcome** dialog box is displayed.

For more information about the Fax Wizard options please see Print to Zetafax from applications

For more information on how to send a fax please see How do I send a fax and Send multiple documents as a single message?

You can also add automation commands (fax addressing, add coversheet, add letterhead, preview fax) to your document which will be used when you send it with Zetafax. The **embedded** commands are found within the **Insert tab** on the ribbon menu.

For more information please see <u>Embedded Addressing</u>

Removing the Word add-in

- Launch **Word**.
- Click the **Office Button**, click on **Word Options** at the bottom of the menu, next to **Exit Word**.
- This brings up the **Word Options** dialog box.
- Click **Add-Ins** on the Left hand side
- Select **Zetadocs and Zetafax Addin**
- In the **Manage** field, select **COM Add-Ins** from the drop down menu and click the **Go..** button.
- This brings up the **COM Add-Ins** dialog box where you will find the that the **Zetadocs and Zetafax Addin** is selected.
- To remove the **Zetadocs and Zetafax Addin,** click the **Remove** button.
- Click **OK.**

Removing the Excel add-in

- Launch **Excel**.
- Click the **Office Button**, click on **Excel Options** at the bottom of the menu, next to **Exit Excel**.
- This brings up the **Excel Options** dialog box.
- Click **Add-Ins** on the left hand side
- Select **Zetadocs and Zetafax Addin**
- In the **Manage** field, select **COM Add-Ins** from the drop down menu and click the **Go..** button.
- This brings up the **COM Add-Ins** dialog box where you will find the that the **Zetadocs and Zetafax Addin** is selected.
- To remove the **Zetadocs and Zetafax Addin,** click the **Remove** button.
- Click **OK.**

Print to the Zetafax printer from applications

If you create a document and print it to the Zetafax printer, the Fax Wizard will be started automatically.

This will prompt you with three options:

- Send as fax
- Save as part of a multi-document fax
- Save as an attachment or system file

Send as fax

Selecting this option starts the New Fax Wizard, allowing you to send the document to your recipients.

Save as part of a multi-document fax

This option allows you to save the document temporarily, to be sent with other documents that you later send to the Zetafax printer.

Save as an attachment or system file

This option should be used if you wish your document to be saved as:

- A coversheet
- A letterhead
- A public attachment - to be accessible by all people on your network
- A private attachment - saved locally to your computer

For further information on how to create a coversheet, please click here.

Related Topics:

how do I send multiple documents as a single message?

how do I send multiple documents as a single message?

Integration with Microsoft Outlook

If you have installed the Zetafax email gateway option, you have the added convenience of being able to send faxes from your email client software, such as Microsoft Outlook. The links below will take you through how to send faxes and apply coversheets, letterheads etc on the various versions of Outlook.

Please note: The Choose from list options for the Add Coversheet and Add Letterhead features are not available to customers using Exchange Online rather than on premise. Users can though still enable these check boxes but the system default is the only option available.

Integration with Microsoft Outlook 2010/2013

This section goes through the steps of sending a simple email message through the gateway using Microsoft Outlook 2010 or 2013.

Sending a fax
Specifying message options
Using Microsoft Outlook Contacts Manager
Notification
Logging

Sending a fax

- Launch Microsoft Outlook 2010 or 2013.
- Click on the Home menu, click **New Items**, then click **More Items** and select **Zetafax** on the submenu to display the **Fax Message** dialog box.

You can directly enter the name, organization and fax number of the person to receive the fax in the **To...** field of the dialog box in the following format: [Fax: <name>@<company name>@<fax number>]

Or you can click on the **Add Recipients** button on the **Ribbon,** under the **Message menu,** and bring up the **Fax Recipients** dialog box.

- Type in the name, organization and fax number in the relevant fields.
- Click on the **Add to list** button. This will add the details of this recipient to the **List of recipients.**

Microsoft Outlook will store a list of names and fax addresses of people you have previously sent fax messages to in the **Previous recipients** list. To add a previous recipient to the **List of recipients**:

- Select the recipient from **Previous recipients** pane.
- Click the **Add to list** button or double click on the selected recipient

To remove a recipient from the list:

- Select the recipient you want to remove
- Click on the **Remove** button

Once you have added all the recipients to the list:

- Click **OK** button to add all the recipients to the **Fax Message** form or **Cancel** button to exit from the dialog box.
- Fill in the **Subject** field on the **Fax Message** dialog box. Finally, type a short note in the main message body and attach any required files.

Specifying message options

Before sending an email you can override any default message options you may have already configured.

- On the **Fax Message** dialog box, click on the **Zetafax Options** button next to the **Add Recipients** button, on the **Ribbon** to display the **Zetafax Options** dialog box:

- Select **Preview fax** if you would like to preview the fax before releasing it to be sent by the Zetafax Server. You can also select the **Prepare for Preview** button found on the **Ribbon** next to **Add Recipients** on the **Fax Message** dialog box
- Finally, send the email message.

If you have selected the **Preview fax** option, once the message has been converted by the Zetafax Server it will be returned to you and will appear in your Inbox for preview. You can preview the fax by opening the email message.

When a fax message has been returned for preview, the **Release Preview Fax** button on the Zetafax toolbar will be enabled. Click on this icon to release the fax to the server for sending. You will be prompted a final time to check the Addressing Details and specify the delivery options:

Using Microsoft Outlook Contacts Manager

When using Microsoft Outlook as your email client software, you can address faxes using the **Business Fax** field in the Outlook Contact manager:

- On the **Fax Message** dialog box, click **To...** button. This will bring up the **Outlook Address Book**.

Outlook lists the names from your database and their address types.
- Select the name you require from the list and click the **To->** button and click **OK**. You can also bring up this address book by clicking on the **Search** button on the **Fax recipients** dialog box
- Finally, type a short note in the main message body and send the email message.

Notification

After a few minutes the gateway will send a response by email to your Microsoft Exchange Inbox, indicating whether the message was sent successfully or not.

Logging

If you need any help with the Outlook integration you can always contact Equisys technical support for assistance. They will ask you for the log file **ZFOutExt.log** which is located in your local temp folder ("\ \Document and Settings\<username>\Local Settings\Temp"). You can enable or disable the logging from the **Tools|Options** menu under the **Zetafax** tab page at the bottom by checking or unchecking the **Enable Logging** box.

Integration with Microsoft Outlook 2007

This section goes through the steps of sending a simple email message through the gateway using Microsoft Outlook 2007.

Sending a fax
Specifying message options
Using Microsoft Outlook Contacts Manager
Notification
Logging

Sending a fax

- Launch Microsoft Outlook 2007.
- Click on the **File** menu, click **New**, then click **Zetafax** on the submenu to display the **Fax Message** dialog box.

You can directly enter the name, organization and fax number of the person to receive the fax in the **To...** field of the dialog box in the following format: [Fax: <name>@<company name>@<fax number>]

Or you can click on the **Add Recipients** button on the **Ribbon,** under the **Message menu,** and bring up the **Fax Recipients** dialog box.

- Type in the name, organization and fax number in the relevant fields.
- Click on the **Add to list** button. This will add the details of this recipient to the **List of recipients.**

Microsoft Outlook will store a list of names and fax addresses of people you have previously sent fax messages to in the **Previous recipients** list. To add a previous recipient to the **List of recipients**:

- Select the recipient from **Previous recipients** pane.
- Click the **Add to list** button or double click on the selected recipient

To remove a recipient from the list

- Select the recipient you want to remove
- Click on the **Remove** button

Once you have added all the recipients to the list:

- Click **OK** button to add all the recipients to the **Fax Message** form or **Cancel** button to exit from the dialog box.

- Fill in the **Subject** field on the **Fax Message** dialog box. Finally, type a short note in the main message body and attach any required files.

Specifying message options

Before sending an email you can override any default message options you may have already configured.

- On the **Fax Message** dialog box, click on the **Zetafax Options** button next to the **Add Recipients** button, on the **Ribbon** to display the **Zetafax Options** dialog box:

- Select **Preview fax** if you would like to preview the fax before releasing it to be sent by the Zetafax
  Server. You can also select the **Prepare for Preview** button found on the **Ribbon** next to **Add Recipients** on the **Fax Message** dialog box
- Finally, send the email message.

If you have selected the **Preview fax** option, once the message has been converted by the Zetafax Server it will be returned to you and will appear in your Inbox for preview. You can preview the fax by opening the email message.

When a fax message has been returned for preview, the **Release Preview Fax** button on the Zetafax toolbar will be enabled. Click on this icon to release the fax to the server for sending. You will be prompted a final time to check the Addressing Details and specify the delivery options:

Using Microsoft Outlook Contacts Manager

When using Microsoft Outlook as your email client software, you can address faxes using the **Business Fax** field in the Outlook Contact manager:

- On the **Fax Message** dialog box, click **To...** button. This will bring up the **Outlook Address Book**.

Outlook lists the names from your database and their address types.
- Select the name you require from the list and click the **To->** button and click **OK**. You can also bring up this address book by clicking on the **Search** button on the **Fax recipients** dialog box
- Finally, type a short note in the main message body and send the email message.

Notification

After a few minutes the gateway will send a response by email to your Microsoft Exchange Inbox, indicating whether the message was sent successfully or not.

Logging

If you need any help with the Outlook integration you can always contact Equisys technical support for assistance. They will ask you for the log file **ZFOutExt.log** which is located in your local temp folder ("\
\Document and Settings\<username>\Local Settings\Temp"). You can enable or disable the logging from the **Tools|Options** menu under the **Zetafax** tab page at the bottom by checking or unchecking the **Enable Logging** box.
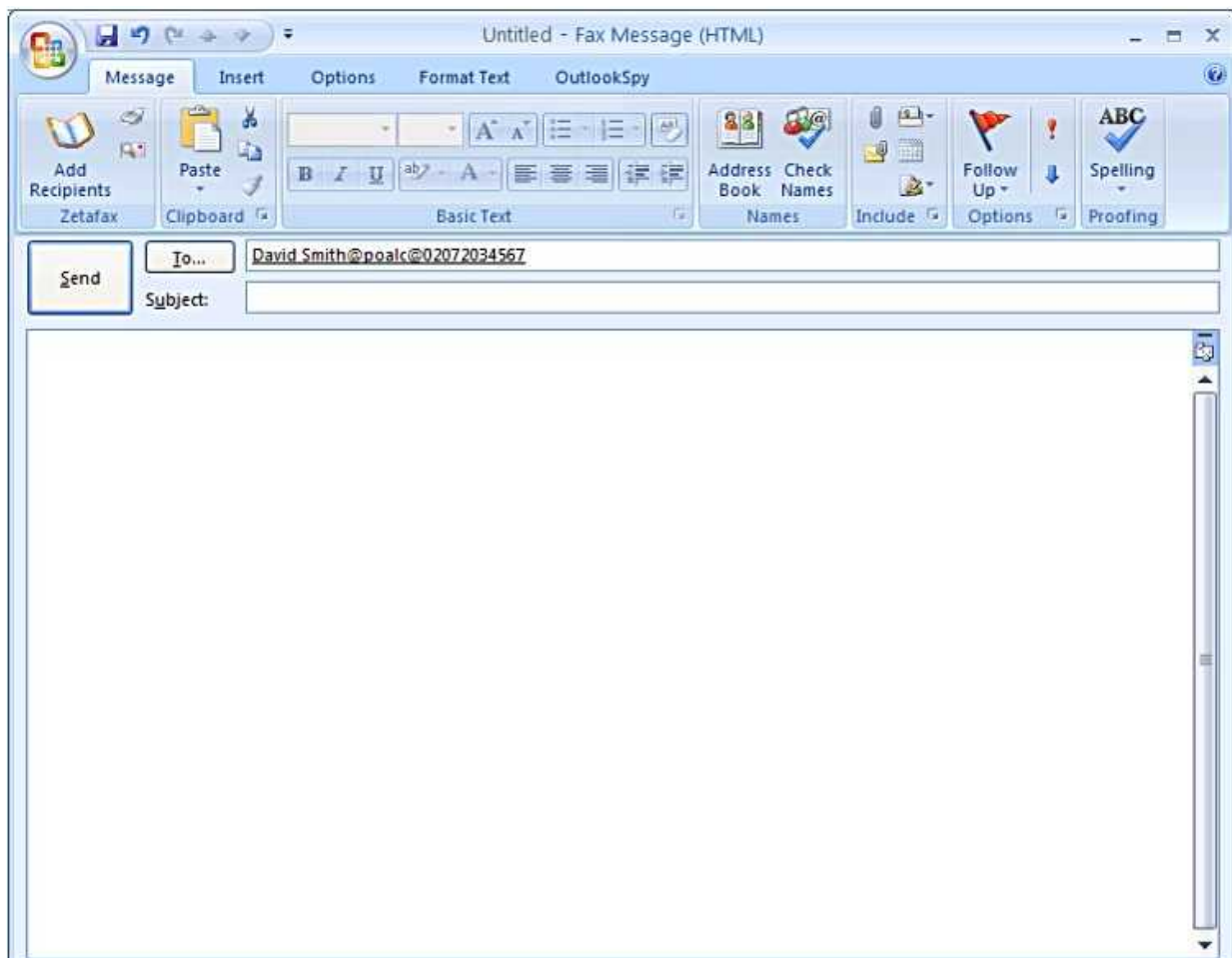
Integration with Microsoft Outlook 2003

This section goes through the steps of sending a simple email message through the gateway using Microsoft Outlook 2003.

Sending a fax
Specifying message options
Using Microsoft Outlook Contacts Manager
Notification

Sending a fax

- Launch Microsoft Outlook 2003.
- On the **File** menu, click **New** , then click **New Fax** on the submenu to display the **Compose fax** dialog box.

You can directly enter the name, organization and fax number of the person to receive the fax in the **Fax Address** section of the dialog box. When you click the **Add** button, Zetafax will enter the recipient's address in the **To** line:

Microsoft Outlook will store a list of names and fax addresses of people you have previously sent fax messages to in the **Previous recipients** list. To retrieve a name from this list, use the following procedure.

- Click the **Previous Recipients...** button and select the name of the person you wish to select in the **Previous recipients** dialog box.

You can select multiple recipients by holding down [Ctrl] while you select names.

You can sort this list by **Name** , **Company** and **Fax Number** by clicking the respective column.

- Click **Add** to select a name from this list or **Cancel** to exit from the dialog box.

If you select a name from this list, it will be added as an addressee in the **To** field of the **Compose fax** dialog box. You are now ready to compose the fax.

- Fill in the **Subject** field on the **Compose Fax** form. Finally, type a short note in the main message body.

Specifying message options

Before sending an email you can override any default message options you may have already configured.

- On the Microsoft Outlook **Tools** menu, click **Options** and select the **Zetafax Options** tab. Alternatively, click on the **Zetafax options** button on the **Compose Fax** form.

This displays the **Zetafax Options** dialog box.

- Select **Return for preview** if you would like to preview the fax before releasing it to be sent by the Zetafax server.
- Finally, send the email message.

Provided you selected the **Return for preview** option, once the message has been converted by the Zetafax server it will be returned to you and will appear in your Inbox for preview. You can preview the fax by opening the email message.

When a fax message has been returned for preview, the **Release Fax** icon on the taskbar will be **enabled**. Click this icon to release the fax to the server for sending. You will be prompted a final time to edit the fax number to be dialed as well as to specify the delivery options.

Using Microsoft Outlook Contacts Manager

When using Microsoft Outlook as your email client software, you can address faxes using the **Business Fax** field in the Outlook Contact manager:

- On the **File** menu, click **New** , then click **New Fax** to display the **Compose fax** form.
- Click **To** to address the message.
- Select Outlook address book, then the name of your contact database; for example **Contacts** from the **Show Names from the** list:

Outlook lists the names from your database and their address type.

- Select an entry of type Business Fax and click **To->** .

If you wish to address the message to other recipients, you can do so from this dialog box.

- Click **OK** and fill in the **Subject** field on the Microsoft Exchange message form.
- Finally, type a short note in the main message body and send the email message.

Notification

After a few minutes the gateway will send a response by email to your Microsoft Exchange Inbox, indicating whether the message was sent successfully or not.

If the **Insert receipts in special folder** option was selected when you configured the default message options, all notifications of successfully sent fax messages will be saved automatically to a Sent faxes folder.

Standard toolbar

Provides buttons that give direct access to the most commonly used commands.

Icon	Description
	Save as Saves the changes you have made to this fax image to a different location.
	Print Allows you to print your fax image.
	Undo Reverses the last action you performed on the fax.
	Zoom in Magnify the displayed image of your fax.
	Zoom out Reduce the size of the displayed image of your fax.
	Rotate left Rotates the fax left by 90°, allowing messages sent the wrong way up to be viewed correctly.
	Rotate right Rotates the fax right by 90°, allowing messages sent the wrong way up to be viewed correctly.
	Flip Rotates the fax upside-down by 180°, allowing messages sent upside-down to be viewed correctly. This command is equivalent to Rotate (View menu).
	Previous Page Displays the previous page, if available.
	Next page Displays the next page, if available.

How do I...

These topics show you how to perform the tasks that are possible with the Zetafax Outlook Addin.

Select a topic from the list below:

How do I send a fax using the new fax form
How do I send a message to a fax recipient
How do I set options on the new fax form
How do I set faxing options for my message
How do I preview a fax before sending
How do I release a fax held for preview
How do I send a fax for approval?
How do I review a fax sent for approval?
How do I resend a fax?

How do I send a fax using the new fax form?

Create and send a new fax using the Compose Fax form

- Select **File**->**New**->**Zetafax** command from the menu or **New**->**Zetafax** from the toolbar or press the **Zetafax** button from the toolbar
- Press the **To...** button or the **Add Recipients** button on the ribbon under the **Message** tab to bring up the **Fax Recipients** dialog box
- Add recipients:
  - New recipients from the fields provided in the dialog
  - New recipients from the Outlook address book
  - Previous recipients from the previous recipients list
- Press the **OK** button in the **Fax Recipients** dialog
- Press the **Send** button

How do I send a message to a fax recipient?

Create and send a new fax using the Message form

- Select **File->New->Mail Message** command from the menu or **New**->**Mail Message** from the toolbar
- Press the **Add Recipients** button to bring up the **Fax Recipients** dialog box
- Add recipients:
  - New recipients from the fields provided in the dialog
  - New recipients from the Outlook address book
  - Previous recipients from the previous recipients list
- Press the **OK** button in the **Fax Recipients** dialog
- Press the **Send** button

How do I set options on the new fax form?

Set the Zetafax options for a new fax form from the Compose Fax form

- From the **Compose Fax** form press the **Zetafax Options...** button from the ribbon under the **Zetadocs** group under the **Message** tab or the **Zetafax Options...** button from the view pane to bring up the **Zetafax Options** dialog

Set the **Zetafax options**:

- Select a **coversheet**
- Select a **letterhead**
- Select if the fax is going to be prepared for **preview**
- Select the **priority** of the fax
- Select the **time** the fax will be sent
- Select the **mail body format** of the fax
- Press the **OK** button

How do I set faxing options for your message?

Set the Zetafax options for a new fax from the Message form

- From the **Message** form press the **Zetafax Options...** button from the ribbon under the **Message** tab to bring up the **Zetafax Options** dialog

Set the **Zetafax options**:

- Select a **coversheet**
- Select a **letterhead**
- Select if the fax is going to be prepared for **preview**
- Select the **priority** of the fax
- Select the **time** the fax will be sent
- Select the **mail body format** of the fax
- Press the **OK** button

How do I preview a fax before sending?

Send a fax for preview

- Create a new fax
- Bring up the **Zetafax Options** dialog

- Select the **Preview Fax** check box
- Press the **OK** button of the **Zetafax Options** dialog
- Add fax recipients
- Press the **Send** button

How do I release a fax held for preview?

Release a preview fax while fax item is open

- Press the **Release Preview Fax or Resend Fax** button from the ribbon under the Zetafax group on the Message tab to bring the Release Fax dialog up
- Type in the fax number (optional)
- Select the time the fax should be sent (optional)
- Select the **Priority** (optional)
- Press the **Send** button to send the fax

Release a preview fax from the main items list

- Select the fax from the items list.
- Press the **Release Preview Fax or Resend Fax** button from the main toolbar to bring the Release Fax dialog up
- Type in the fax number (optional)
- Select the time the fax should be sent (optional)
- Select the **Priority** (optional)
- Press the **Send** button to send the fax

How do I send a fax for approval?

Send a fax for approval while preview fax item is open

- Press the **Send fax for approval** button from the ribbon under the **Zetafax** group in the **Message** tab to bring the **Send Approve Fax** form on.

Note: For Outlook 2003 users, the Send for approval button is found on the toolbar.
- Press the **To...** button to add recipients from the Outlook address book
- Add a subject in the **Subject:** field (optional)
- Annotate the fax (optional)

- Press the **Annotate Fax...** button to bring the **Zetafax Viewer** dialog on
- Annotate the pages using the tools of the **Zetafax Viewer**
- **Save** and **Exit** the **Zetafax Viewer**
- Press the **Send** button to send the fax

Send a fax for approval from the main mail items list

- Select the fax that you want to send for approval from the items list.
- Press the **Send fax for approval** button [image] from the main toolbar to bring the **Send Approve Fax** form on
- Press the **To...** button to add recipients from the Outlook address book
- Type in a subject in the **Subject:** field (optional)
- Annotate the fax (optional)
- Press the **Annotate Fax...** button to bring the **Zetafax Viewer** dialog on
- Annotate the pages using the tools of the **Zetafax Viewer**
- **Save** and **Exit** the **Zetafax Viewer**
- Press the **Send** button to send the fax

How do I review a fax sent for approval?

Approved fax

- Open the fax from the items list.
- Type in some comments in the text box (optional)
- Annotate the fax (optional)
- Press the **Annotate Fax...** button to bring the **Zetafax Viewer** dialog on
- Annotate the pages using the tools of the **Zetafax Viewer**
- **Save** and **Exit** the **Zetafax Viewer**
- Press the **Accept Fax** button from the ribbon under the **Zetafax** group in the **Message** tab to approve the fax

Not approved fax

- Open the fax from the items list.
- Type in some comments in the text box (optional)
- Annotate the fax (optional)
- Press the **Annotate Fax...** button to bring the **Zetafax Viewer** dialog on
- Annotate the pages using the tools of the **Zetafax Viewer**
- **Save** and **Exit** the **Zetafax Viewer**
- Press the **Reject Fax** button from the ribbon under the **Zetafax** group in the **Message** tab to reject the fax

How do I resend a fax?

Resend a previously sent and rejected fax while fax item is open

- Press the **Release Preview Fax or Resend Fax** button from the ribbon under the **Zetafax** group in the **Message** tab to bring the **Release Fax** dialog up
- Type in the fax number (optional)
- Select the time the fax should be sent (optional)
- Select the **Priority** (optional)
- Press the **Send** button to send the fax

Resend a previously sent and rejected fax from the main mail items list

- Select the rejected fax from the items list.
- Press the **Release Preview Fax or Resend Fax** button from the main toolbar to bring the **Release Fax** dialog up
- Type in the fax number (optional)
- Select the time the fax should be sent (optional)
- Select the **Priority** (optional)
- Press the **Send** button to send the fax

How do I work out why a fax has failed to be sent?

There are different reasons why your fax has not been sent, and the following list lists reasons that will be reported by the Zetafax Server. This will allow you to check why your fax failed, and resend the fax if appropriate.

General errors

F001	Invalid parameter (general)
F002	No file handles available
F003	Pathname invalid
F004	Filename invalid
F005	Run out of possible file names
F006	Can't open file (general)
F007	Can't open control file
F008	Invalid control data
F009	Can't open message file
F00a	Task was aborted by request
F00b	System shut down
F00c	General file error
F00d	Wrong format file, etc
F00e	Illegal request
F00f	Feature not supported yet
F010	Invalid message
F011	Invalid device

F012	No working devices of correct type
F013	Unable to send
F014	No space on disk
F015	Can't convert file format
F016	Error in receiving
F017	Init variable not in environment
F018	Unable to open ZETAFAX.INI
F019	Bad format ZETAFAX.INI file
F01a	Path does not exist
F01b	Error deleting file(s)
F01c	Not Tiff file
F01d	Only support normal byte order (" II") Tiff
F01e	Only support MH tiff
F01f	Only support 1 strip per page tiff
F020	Only support inches for resolution unit
F021	Only support certain extended (pointer) tags
F022	Only support lsb first
F023	Remote process not active
F024	Error with licence
F025	Missing UserArea: etc in ZETAFAX.INI
F026	Can't open SETUP.INI
F027	Can't determine format
F028	Only support 100, 200 and 400 dpi
F029	User not found in USERLIST.INI file
F02a	Can't open USERLIST
F02b	Bad USERLIST Dial: line
F02c	Bad USERLIST NetworkEdit:
F02d	Bad USERLIST SendTime:
F02e	Bad USERLIST Urgent:
F02f	Bad USERLIST Admin:
F030	No permission to send to this phone number
F031	Licence expiry date passed
F032	Bad USERLIST RushToTop:
F033	Can't requeue message
F034	Can't open ROUTING file
F035	Invalid ROUTING file
F036	No SUBADDR/SENDERID para
F037	No ACCUSOFT.DLL
F038	No ACCUSOFT.DLL
F039	Bad USERLIST PrivateEdit: line
F03a	Bad USERLIST SubmitAny: line
F03b	Memory allocation failed
F03c	O/S error
F03d	Bad USERLIST GroupAdmin: line
F03e	Queueman internal use
F03f	Couldn't load mail DLL
F040	Couldn't logon to mail
F041	Couldn't logoff from mail
F042	User pressed CANCEL etc
F043	General error sending mail
F044	General error resolving name
F045	Two or more matches for recipient specified
F046	Attachment file error
F047	Recipient not found
F048	Recipient not found
F049	V5 mail upgrade is for too few users
F04a	Couldn't write to mail directory
F04b	Disk full
F04c	Insufficient memory
F04e	Invalid mail message identifier
F04f	Invalid mail session handle
F050	Too many attachments to mail message
F051	Too many recipients for mail message
F052	No message found
F053	Failed to read mail message
F054	Invalid parameters for mail function
F055	Failed to delete mail message
F056	'Abort after preview' option set on mail message
F057	Win95 can't use foreign DLL if system locale is wrong
F058	WinNT message box system font can't support foreign chars

F059   Requested folder not available or invalid
F060   Can't change 'mail type'
F061   Can't specify password for this system
F062   Can't find required DLL (mail)

Dialling properties errors
F070   General dialling properties error
F071   No dialling properties data retrieved
F072   Editing rules make this number too long
F073   Invalid dialling properties settings
F074   Dialling properties switched off

TAPI errors
F080   General TAPI error
F081   TAPI not initialised
F082   Error initialising TAPI
F083   Error with TAPI location data

Device specific errors
F100   Can't talk to device - permanent
F101   Can't talk to device -in use
F102   Should recover soon
F103   No answer when sending
F104   Destination ID doesn't match
F105   Comms error sending
F106   Comms error receiving
F107   Serious error in communicating with the device
F108   Device handler timeout
F109   Server not running
F10a   Phone number engaged
F10b   Phone call not answered
F10c   No dial tone on line

Convert program errors
F200   Top word of all errors (convert programs only return low word)
F201   Can't open TOOLS.INI file
F202   ServerArea: variable missing
F203   CTL file not found
F204   Unrecognised destination format
F205   Coversheet foreground file missing
F206   Message file not found
F207   Letterhead file missing
F208   Can't create message files
F209   CVT file invalid
F20a   File too large
F20b   File error with intermediate files
F20c   File write error
F20d   File read error
F20e   Letterhead or Coversheet background file invalid
F20f   CVT file not found
F210   Unable to initialise fonts
F211   File error with FAX header line files
F212   Run with invalid arguments
F213   NULL length message
F214   Tiff message file invalid
F215   AllUserArea not found
F216   Init not in environment
F217   General error
F218   General file error
F219   General init error
F21a   Graphics append file not found
F21b   Graphics include file not found
F21c   Graphics append file invalid
F21d   Graphics include file invalid
F21e   Control file invalid
F21f   Aborted by user

F220   Invalid control char
F221   Invalid escape sequence
F222   Invalid %%[] command
F223   Landscape buffer allocation failed

Address book errors
F300-F321

LCR and Router errors
F400   Message already listed
F401   Message already tried and failed
F402   No message ID
F403   Too many files to process
F404   Multiple hopping not allowed
F405   Message type unrecognised
F406   Insufficient memory
F407   Expected attachment file missing
F408   Invalid data in message
F409   Remote server too busy to send in time
F40a   Link or run numbers don't match
F40b   Remote server not allowed to receive fax submissions
F40c   Failed to send message
F40d   Local link failed
F40e   Remote server not online
F40f   Receiver's run number is wrong
F410   No links to remote servers available
F411   This message can only be sent directly (locally)
F412   Message priority too high
F413   Message timed out
F414   Message rejected by remote server
F415   Send attempt failed - link now inactive
F416   Send attempt failed - link no longer exists
F417   Not allowed to send this message via local server
F418   Encryption error
F419   Link not 'Send enabled'

API errors
F700   63232   Invalid parameters
F701   63233   Not initialised
F702   63234   No Zetafax initialisation file
F703   63235   Invalid Zetafax initialisation file
F704   63236   Unknown user
F705   63237   Cannot log on
F706   63238   Path not found
F707   63239   Too many files
F708   63240   Error creating file
F709   63241   Error opening file
F70A   63242   File error
F70B   63243   File not found
F70C   63244   Server not running
F70D   63245   Invalid data format
F70E   63246   Unknown message
F70F   63247   Message not completed
F710   63248   Message already exists
F711   63249   Error opening information file
F712   63250   Information file error
F713   63251   Information file invalid
F714   63252   Cannot submit request
F715   63253   Buffer too small
F716   63254   Submit file invalid
F717   63255   Cannot read message defaults
F718   63256   Error opening control file
F719   63257   Control file error
F71A   63258   Control file invalid
F71B   63259   Server running
F71C   63260   Cannot run system manager
F71D   63261   Error starting server

F71E	63262	Server initialisation file error
F71F	63263	Function aborted
F720	63264	Timeout expired
F721	63265	Port invalid
F722	63266	Port busy
F723	63267	Port offline
F724	63268	Memory allocation failed
F725	63269	License file error
F726	63270	API not licensed
F727	63271	User not initialized

Workstation error codes

F800	Cannot delete file
F801	Cannot write to or create
F802	Cannot create file
F803	Cannot rename file
F804	Cannot r/w file
F805	Cannot access file details
F806	File does not exist
F807	Control file syntax error
F808	Problem with global memory
F809	Cannot read file
F80A	Problem writing file
F80B	Bad DDE command or parameters
F80C	Failure using %%[ ] command
F80D	Library request failed
F80E	Problem with mail
F80F	INI file syntax error
F810	.LST file has invalid .INI file format
F811	Problem with ODBC DLL
F812	Problem with control file checksum
F813	Accusoft Error

What is the Zetafax Outlook Addin?

Installed as part of the main Zetafax Client Applications install process, the Zetafax Outlook Addin uses the core functions of Zetafax to allow you to send and receive faxes from within Outlook.

Using the Zetafax Outlook Addin gives you the option to send faxes using either the standard email message or the special fax message form.

Related Topics
Integration with Microsoft Outlook

What is the Zetafax Word Addin?

Installed as part of the main Zetafax Client Applications install process, the Zetafax Word Addin allows you to convert documents from within Word, allowing them to be sent out as faxes.

The Zetafax Word Addin consists of:
- Buttons and menu options that allow you to convert your worksheets to fax attachments.
- Embedded commands that can be automatically inserted into your document from the Zetafax command - allowing you to automate document creation and sending.

Related Topics
Integration with Microsoft Office
Use Embedded Addressing

What is the Zetafax Excel Addin?

Installed as part of the main Zetafax Client Applications install process, the Zetafax Excel Addin allows you to convert worksheets from within Excel, allowing them to be sent out as faxes.

The Zetafax Excel Addin consists of:
- Buttons and menu options that allow you to convert your worksheets to fax attachments.
- Embedded commands that can be automatically inserted into your document from the Zetafax command - allowing you to automate document creation and sending.

Related Topics
Integration with Microsoft Office
Use Embedded Addressing

Mouse shortcuts

Zetafax includes several useful shortcuts to allow you to perform common actions directly with the mouse, without needing to use the keyboard or select a command.

This section lists the most useful tasks you can perform directly with the mouse; for more information refer to the appropriate section in this Zetafax Client Help.

To view the message in the Inbox window, Outbox window, or Folder List

- Double-click the message with the mouse pointer.

For more information, see Zetafax Viewer window.

To forward a message from your Inbox window

- Drag the message and drop it onto your **Outbox** window.

The **Zetafax - Fax Wizard Recipients** dialog box will be displayed to allow you to address the message in the usual way.

For more information, see Forward.

To fax a file from the Folder List

- Drag the file and drop it onto your **Outbox** window.

The **Zetafax - FaxWizard** dialog box will be displayed to allow you to address the message in the usual way.

For more information, see How do I use my address book to address a fax?

To archive a message from the Inbox window or Outbox window

- Drag the message and drop it onto the **Folder List** window.

A **Save as** dialog box will be displayed to allow you to name the archive, and specify additional options.

For more information, see How do I archive my messages?

To delete or abort a message from the Inbox window or Outbox window

- Drag the message and drop it on to your Recycle Bin.

If the message is an unsent message in your **Outbox** window you will be given the option of aborting it.

To perform operations on a message

- Click the message with the right mouse button to display a pop-up menu of commands.

- Click the command you want to perform.

Editing graphics files

It may be necessary from time to time to edit graphics for a fax. Zetafax has the ability both to export and to import graphics in the standard graphics file formats such as BMP. You can then use a program such as Paint, which is distributed with Microsoft Windows, to edit graphics images, whether scanned or received as incoming faxes. This can be used for example to edit a page of a received fax or scanned document before sending it, or to create letterheads, coversheets, etc. for use in Zetafax.

In addition to the import and export procedures described below, graphics files may be directly inserted into a fax using the embedded command **Insert** function.

The basic facility offered allows you to export the whole page of a fax, edit at will in Paint or similar, and import the page to add or replace any existing page in any existing prepared fax.

To edit a graphics file

* Select the file to edit in the Zetafax Client folder list.
* On the **Message** ribbon, **View** group, click **View**.

When viewing the document go to the relevant page either using the numbered box icons, or by clicking **Go to Page** from the **Page** menu.

When the correct page is displayed:

* On the **File** menu, click **Export** to display the **Export page** dialog box.
* Give the file an appropriate name, select **BMP** from the **Save file type:** field, and click the **OK** button.

At this point, you can iconize Zetafax if you wish.

* Start Paint (it is in the **Accessories** group).
* On the **File** menu, click **Open**, and select the file in the usual way.
* Use the Paint facilities to edit the file as you wish.
* On the **File** menu, click **Save** to save to the same name, or use **Save As** to save as a new file.
* Close Paint and reopen Zetafax if iconized.

If you exited from view mode before loading Paint, select the document now and on the **File** menu, click **View**.

If you are still in view mode, but wish to load another document to receive the changed graphic page, on the **File** menu, click **Quit Viewing** , select the document, and on the **File** menu, click **View**.

If you are not at the page you wish to replace:

* Go to the page by clicking the numbered box icon, or by clicking **Go to Page** on the **Page** menu.
* On the **File** menu, click **Import** , select the file, and click **OK**.
* Select **Replace pages** so that the changed file replaces the current page.

Note that imported BMP files must be 1728 pixels wide and monochrome.

Note: If you have difficulty in creating graphics files for import which are compatible, it may be better to drag a graphics file from Windows Explorer and drop it on the Zetafax main window. The **Zetafax - Fax Wizard Recipients** dialog box will appear for you to send the file as a fax, or you can click **Save As** to save the file as a TIFF format file (which may be sent later). If you want to attach this file to faxes you send, you should save it in the Private or Network graphics directory.

Scanning

If you have a suitable scanning device you can scan in letterheads, coversheets, and graphics for inclusion in a fax.

Zetafax can also be used with a network attached scanning device, such as the Hewlett Packard Digital Sender.

To set up the default Zetafax Client TWAIN scanner

- On the **Options** ribbon, **Scanners** group, click **Select Source**.

To specify whether or not you want Zetafax to use the scanner's own software user interface when scanning, on the **Options** ribbon, **Scanners** group, click **Scanner Options**.

To scan the document

- On the **Message** ribbon, **New** group, click **New Item**, then **Scan** .

If you are using a client TWAIN scanner, the document will be scanned a page at a time. You will be asked whether you would like to stretch/shrink each image to fax size if it is substantially different in resolution from a fax page. The **Zetafax - Fax Wizard** will then be displayed to allow you to address the message and send it as a fax.

Any document which has been scanned earlier using another application and saved as a graphics file may be sent as a fax directly by dragging it from Windows Explorer and dropping it on the Zetafax main window.

FAQ's

How do I send a simple fax?

- Open the Zetafax Client and select **Send**.

A dialog box will be displayed, asking whether you want to resend an existing message, send a coversheet or send a file from the network.

- Select which you want.

Zetafax will notify you whether the sent fax was successfully received.

How do I send a fax from within an application?

Simply print your document to the Zetafax printer from whichever application you are in. If the client is already running, the usual addressing dialog box will appear. If the program is not running it will either start up automatically once you select the Zetafax printer or you will be prompted to run the client.

How do I know when a fax has been sent?

Zetafax will automatically send you confirmation that a fax has been sent successfully. If not, you will receive a **Fax failed** message. If you look in the client and select the fax you will be able to see why it failed.

Can Zetafax maintain a list of regular contacts?

Yes. Zetafax has two types of address book: private and network. Users can add, change and remove entries from their own private address books. No other user can access your private address book. All users have access to the network wide address book. The network administrator determines which users can add, delete or edit entries in the network address book.

Can I retrieve names and fax numbers from other sources?

Yes. You can retrieve lists of names and fax numbers from other sources in the following ways:

- Any fax number you enter is kept automatically in a list of past recipients.
- Names and fax numbers in ODBC compliant databases may be accessed in situ from these databases.
- Comma delimited (CSV) files of names and fax numbers may be used directly.
- MAPI compliant email address books may be used in place of the Zetafax address books.

Can I get information on messages I have sent?

Yes, Zetafax will store information about each message sent. Once you have sent a message the icon to the left of the entry will change as a visual check to the status of the fax that is being sent. You can check the progress of the fax being sent by clicking with the right mouse button on a particular fax and selecting **Info...** . A **Message Information** dialog box will appear which tells you when the fax was submitted to the Zetafax server, when it was accepted and when the fax was sent. If the transmission was unsuccessful it will say **Message failed**.

How can I view faxes?

You will want to view a fax if it has been received or if you wish to view a fax you have prepared before sending.

To view a fax from the Zetafax Client:

- Double-click a message in the **Inbox** or **Outbox** window.
- The Zetafax Viewer will appear with your selected fax.
- Use the vertical scroll bar to scroll down the fax.

You can view multiple page faxes by clicking on the numbered boxes to the right of the viewing window.

Can I annotate faxes before forwarding them on?

Yes, certain third-party viewers are able to support annotation of faxes. If your viewer supports annotation, it can be used to modify faxes in the Inbox window.

To modify a fax from your **Inbox** window:

- Highlight the fax and on the Zetafax Client **Tools** menu, click **Annotate** .

By default, Zetafax configures Windows Imaging as the default viewer for annotation. However, if you wish to select another application, you can do so by clicking **Viewer** on the **Options** menu.

Can I convert a fax into a document so I can change it in a Word Processor?

Yes, with Optical Character Recognition (OCR). The program has to look at the dots in the received image in order to recognize the individual letters and words. Zetafax can be used with many leading third party OCR products.

What are embedded Commends?

The Zetafax embedded commands allow you to customize the body of a fax for each recipient.

The embedded commands allow you to include system information, such as date and number of pages, or instructions to incorporate a signature, or information from the Address Book, such as the recipient's name and address.

Can Zetafax store transmission reports?

Yes, Zetafax keeps a detailed log of all sent faxes, together with any errors that occur. The Zetafax Client provides several options for viewing these, including:

- All faxes sent to me today.
- All errors reported by the fax device.
- All errors that occurred on this message.

Additionally each user can decide whether they want Zetafax to store transmission reports for faxes that they send. These list the options used when the document was last faxed (whether a coversheet and letterhead were used, etc), together with the people it has been sent to, and when.

If the user enables this feature, then this record is kept indefinitely and is stored in the same directory as the original document file which it refers to, in a separate text file called ZETAFAX.DIR (one per directory).

How do I keep track of fax usage?

Every fax submitted by a user stays in their **Outbox** window until they delete it, allowing them to view what was sent and to retrieve the transmission history. The logging facility allows users to check whom they have sent faxes to, and administrators can obtain a list for all users. Finally, the billing log has an entry made for every fax that is sent, including details such as the fax number and connection time.

Does Zetafax store copies of sent and received faxes?

Yes, Zetafax has an archiving feature that is configured using the Zetafax configuration program ZFSETUP. The archiving feature stores a copy of every fax sent and/or received, exactly as transmitted. The fax itself is saved as a graphics file, which can subsequently be viewed or printed, and a transmission history for the fax is saved in a separate file.

Can Zetafax print hard copies of sent and received faxes?

Yes, you can print hard copies of any fax that you have sent or have received. You can also configure the Zetafax server to print every fax sent or received automatically, with a status page that gives transmission details.

Can Zetafax handle paper documents?

If you wish to send a paper document using Zetafax, simply scan in the document you wish to send and then open your scanning application to view the document. Once you are happy with it, print to the Zetafax printer. The **Zetafax – Fax Wizard Recipients** dialog box will appear and you can send the fax as usual.

Zetafax can also be used with a network attached scanning device, such as the Hewlett Packard Digital Sender.

The Hewlett Packard Digital Sender devices connect directly to a network Zetafax server and allow faxes to be submitted directly from the scanner, entering the required fax number on the scanner's control panel.

Glossary

A

Address book
Annotation
Application Programmers Interface (API)
Application servers
Archive
Attachment files
Automatic forwarding
Automatic submission program

B

Billing log

C

C language callable functions
Cardiff TELEform
Charge codes
Class
Contact managers
Coversheet Editor
Coversheets

D

DDI/DID routing
DTMF routing
Dynamic Data Exchange (DDE)

E

Email gateway
Embedded addressing
Event Viewer

F

Fax class
Fax group
FAX.LOG
Fax Outbox folder
FClass
File formats

G

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Address books

Zetafax provides built-in address books to make it easy to send faxes and text messages on a regular basis to the same people or companies.

There are two levels of address book: private and network.

You can freely add, change, and remove entries from your own private address book, and no other user has access to this.

In addition there is also one network-wide address book which all users have access to. The network administrator determines which users are allowed to add, delete, or edit the entries in the network address book.
For more information about using the address books, refer to the related topics below:

Related topics
How do I add to my address book?
How do I use my address book to address a fax?
How do I use a CSV file to address faxes?
How do I link an ODBC compliant database to my address book?
Zetafax Client window
Search
New Entry
New Group

Annotation

The Zetafax integrated fax viewer allows users to annotate faxes received through either the Zetafax client or their email client. It can be used to modify faxes, for example, comments can be added to a fax, it can be combined with pages from different faxes, or stamped with a received date.

Related Topics

How do I view a fax?
How do I Annotate a fax?
The Annotation toolbar

Automation Toolkit

Zetafax has an Automation Toolkit, which makes it simple to automate the sending of faxes and text messages from other applications. It is designed for use with Windows applications, DOS programs, minis and mainframes.

The Automation Toolkit contains the Application Programmers Toolkit (API) and has been used in a wide range of tailor-made solutions ranging from the automatic faxing of financial statements to the forwarding of faxes from unattended satellite ground stations around the world.

For more detailed information, see the **Zetafax API** online help or refer to the datasheet available from www.equisys.com.

Related topic
C language callable functions

Application servers

Zetafax now supports server-based (thin client) computing platforms:

- Citrix MetaFrame, MetaFrame XP, and Winframe.
- Microsoft Terminal Servers for Windows NT 4.0 and Windows 2000.

Zetafax accounts can be set up centrally from the application server computer, saving network administrators time, giving organizations more flexibility and reducing Total Cost of Ownership (TCO). Using Zetafax in this environment enables support for thin and rich desktop environments and improved cross platform support.

For more detailed information, refer to the **Zetafax in an Application Server Environment** datasheet available from www.equisys.com/support/KnowledgeBase/DocumentationZF.htm.

Archive

Zetafax allows you to archive every message sent or received onto disk, allowing you to retrieve them days or even months later. You can also print faxes automatically on any network printer, with an optional status page giving the connection time and details.

Related topics

How do I archive my messages?
Mouse shortcuts
Move/Save

Attaching Documents

Whenever you send a fax, you are able to attach multiple documents. These can either be **System attachments**, that are available to all Zetafax users on your system, or other files in a compatible format that are saved locally.

Both types of attachments are attached within the **Zetafax Fax Wizard Options** screen. Select the **Attach** option to bring up the attachments dialog.

System attachments

For documents, that you wish to use regularly, and on more than one computer, they can be stored, in graphical form on the Server. This removes the need for the server to convert your attachment with your fax job, reducing the time taken to send your fax, and removing any risk that your attachment will not render correctly.

To attach a file:

- Select the **System attachment** option.
- From the displayed list, select the file you wish to attach (For information on how to create a system attachment click here).
- Press the View button to preview the file you are about to attach.
- Select OK, to return to the previous screen with your document attached.

Attaching Documents

This allows you to attach any document that you wish to send with your fax, that can be rendered correctly, as standard you can render:

- A word document.
- An Excel spreadsheet.
- A PowerPoint presentation.
- A PDF file.

With the document rendering add on licence enabled, this list extends to include many other file types.

To attach a file:

- Select the Add option.
- Locate the file you wish to attach.
- Select the Open option.

The file or files you have selected will be shown in the attach document window.

- Highlight a file and press the Remove button to remove this file from your fax.
- Highlight a file and press the Preview button to open the file and check it before sending.
- When all the files you wish to attach are present, select the OK option to attach them to your fax.

Related topics

How do I send a fax?
Integration with Microsoft Office
Attachment files
Creating a system attachment

Attachment files

Attachment files are multi-page graphics files which can be added to the end of a fax being sent.

Any document you could send as a fax, or any received fax, can be saved as an attachment file. This includes images in any of the supported graphics formats (ASCII, PCX, DCX, Epson FX and LQ series, TIFF, Windows metafile bitmaps) as well as any word processor or text file.

Examples of an attachment file might include a corporate brochure, price lists or a map giving directions to your office.

Related topics
How do I send a fax?
Integration with Microsoft Office
Attaching documents
Creating a system attachment

Automatic forwarding

All faxes for a specific user are forwarded to another user (often used when someone is sick or away on vacation).
You can tell Zetafax to forward all faxes sent to you to another user. You can even choose whether to keep your own copy of the faxes for when you return.

The automatic forwarding can work repeatedly in a chain if necessary. For example, if the person looking after your messages also goes on holiday, his or her messages (including those forwarded from your account) can be forwarded on to someone else.

Related topic
Forward To Zetafax User

Automatic submission program

The ZSUBMIT program is a part of the API toolkit which lets DOS, mini and mainframe programs send faxes and text messages by creating text files in a shared directory on a file server. For example, faxing purchase orders or invoices usually only requires adjusting an accounts packages report writer.

A text file needs a few lines added to give the fax/mobile number and message options. Logos and signatures can be included and the text may be merged onto a multi-page form using the letterhead feature in Zetafax. This approach gives results rapidly.

Related topics

For further information please refer to the API help files available from www.equisys.com/support/KnowledgeBase/DocumentationZF.htm

Billing log

A record of all faxes sent using Zetafax is kept in the billing log – FAX.LOG. This file is stored in the zfax \SERVER\Z-DB directory.

A line is added for every message sent, giving details such as the Zetafax user name, addressee name and company, the phone number, the connection time and number of pages sent.

The billing log file is analyzed by the Zetafax Report Writer which creates tabular and graphical forms that highlight faxing trends.

C language callable functions

For the greatest degree of control, the Zetafax API toolkit includes a library of functions which may be called from Windows 2000, Windows NT and Windows 95/98 programs.

Application programs can submit new faxes for sending, and monitor/control faxes already in the central queue. In addition, a range of other function calls allows programs to control and obtain information about the messages. These include: Specify the Zetafax user account to use. Submit a new message for sending. Abort a message already in the queue. Get a list of all messages queued for the user. Check the current status of a given message. Retrieve the transmission history for a message.

For more detailed information, refer to the datasheet available from www.equisys.com/documentation.

Related topic
Application Programmers Interface (API)

Cardiff TELEform

Cardiff TELEform is a data collection product used to bridge the gap between paper and electronic data collection.

Combining Zetafax with TELEform allows companies to cut their data input costs significantly.

Business forms such as credit applications can be received via a Zetafax server and forwarded to TELEform, which quickly and accurately interprets the individual characters and automatically inputs the data into databases, spreadsheets or ASCII files. This eliminates the need for manual data entry and hence processing time is drastically reduced from hours to seconds.

Charge codes

Charge codes can be enabled, and made optional or compulsory, using the Zetafax Configuration program (ZFSETUP). Users are prompted to enter a charge code after addressing the fax in the **Zetafax - Fax Wizard Recipients** dialog box. Charge codes are logged in the billing log (FAX.LOG).

Related topic

For information on how to set up charge codes for your organization, please refer to the Zetafax Setup help that is installed with your server.

Class

The service class of the fax modem describes the specification that a PC uses to communicate with the fax modem. The most common classes of fax modem are Class 1, Class 2 and Class 2.0. These classes are specified as extensions to the Hayes command set.

Related topic

Fax class

Contact managers

Zetafax can be used with most popular contact manager applications to retrieve lists of names used to address faxes and perform personalized fax broadcasts to multiple recipients.

Related topic

How do I use my address book?

Coversheet Editor

The Zetafax Coversheet Editor allows you to create and edit a coversheet in a single window. It works in a similar way to desktop publishing applications, so many of its features should be familiar to most users.

The Coversheet Editor allows you to import image files, such as a company logo, position and re-size them, and overlay text and field objects. In addition, you can add boxes and lines to further enhance the presentation.

Related topic

Zetafax Coversheet Editor window

Coversheets

Zetafax allows you to configure personalized coversheets for use when sending faxes. Each coversheet consists of two files: a foreground file which contains text which is different for each fax (such as the name and organization), and a background file, containing fixed information such as the company logo. The background file is optional, and can be omitted if all fixed information is in the foreground file.

Related topic

Zetafax Coversheet Editor window

Creating a system attachment

For documents, that you wish to use regularly, and on more than one computer, they can be stored, in graphical form on the Server. This removes the need for the server to convert your attachment with your fax job, reducing the time taken to send your fax, and removing any risk that your attachment will not render correctly.

To create a system attachment:

1. Create a document you wish to convert to an attachment in a Zetafax compatible program, for example Microsoft Word.
2. Print your file to the Zetafax Printer.

The **Zetafax Fax Wizard - Welcome** dialog will be displayed.

3. Select the **Save as attachment or other system file** option.

The **Save as** dialog will be displayed.

4. Choose the **Coversheet, letterhead or attachment file** option.
5. Click **OK**.

The **Save As System File** dialog will be displayed.

6. Choose **Public attachment file - for use by everyone.**
7. Provide a name for your attachment, and a brief description of the file.
8. Select **OK** to save your attachment.

Your file will now be able to be attached by any Zetafax user.

Related topics
How do I send a fax?
Integration with Microsoft Office
Attaching documents
Attachment files

Dynamic Data Exchange (DDE)

Addressing information can be passed directly to the Zetafax Client using DDE from other Windows applications.

Related topic

Application Programmers Interface (API)

DDI/DID routing

Many companies already have a phone system (PBX) where each extension can be dialed directly from outside the company, rather than having to go via the switchboard. The technology behind this is called Direct Dialling Inwards (DDI or DID), and is as applicable to fax as it is to voice calls.

This is the most direct of the inward routing methods. Each user is given their own fax number – not a separate fax line, just their own number. Faxes sent to that number are routed directly to the user. Groups of users can also be allocated a DDI/DID number giving Departmental DID routing capabilities.

The number of fax numbers allocated is independent of the number of fax lines on your Zetafax system – all you do is define a table of fax numbers, giving the Zetafax user account corresponding to each one.

If your phone system supports DDI for telephone calls already, it can be configured simply to allow DDI for fax. If you do not already have DDI you can install a separate digital telephone line (ISDN) to support it just for fax.

Related topic

For information on how to set up DDI/DDE routing please refer to the Zetafax Setup help that is installed with the server.

DTMF routing

The method Zetafax uses for DID routing is to recognize DTMF tones sent to the fax server just after it answers the call, telling it what number was dialed. These are the musical tones generated by most telephones when the number keys are pressed.

Even without giving each user their own fax number, you can still get the same effect by getting the sender to key in extra digits after Zetafax answers the call. This is normally done by adding them to the fax number, after a few "pause" characters. Because of the relatively high level of sophistication required this is suitable for expert fax senders only!

Email gateway

The Zetafax email gateway allows users on the network to send and receive fax messages directly from their email client. Zetafax integrates with all leading email systems: Microsoft Exchange, Lotus Domino and SMTP.
See the **Zetafax Configuration** online help for more information.

Embedded addressing

Like many fax packages, Zetafax has a printer driver. Print from any application, and a dialog box will pop up asking you where the fax is to be sent. With the API this can be automated by including options such as the fax number in the document being printed. Zetafax will pick out the embedded addressing information and act upon it.

You can use embedded addressing to broadcast faxes from a database or using a word processor mail-merge. Each recipients copy will be personalized.

Addressing options controlled by embedded addressing: Name, organization and fax number. Senders name and charge code. Coversheet and letterhead to use. Time to send and priority (urgent, normal or background). Attachment files such as product literature or maps.

Related topic
Application Programmers Interface (API)

Event Viewer

The Windows NT Event Viewer allows you to monitor any problems that may occur on the Zetafax server during everyday use. It provides information about such events as errors, warnings, and the success or failure of tasks. An event is any potentially significant occurrence in the system or in the application. Some critical events are noted in on-screen messages, as well as in the event log. Non-critical events are merely logged.

Related topics

Logs
Storing transmission reports

Fax class

The service class of the fax modem describes the specification that a PC uses to communicate with the fax modem. The most common classes of fax modem are Class 1, Class 2 and Class 2.0. These classes are specified as extensions to the Hayes command set.

Fax class 1

A class 1 fax modem is little more than a data modem with a few extra frequencies that are necessary for group III fax transmission.

Fax class 2

Class 2 is a higher level specification than class 1. More of the fax protocol work is done within the fax modem firmware. This fax service class specification was never formally approved by the ITU.

Fax class 2.0

Class 2.0 is similar to the Class 2 specification, but has been formally approved by the ITU.

Fax group

The group of a fax device describes the method it uses to communicate with other fax devices (e.g. over the telephone PSTN). The most common group is group III.

FAX.LOG

A record of all faxes sent using Zetafax is kept in the billing log – FAX.LOG. This file is stored in the zfax \SERVER\Z-DB directory.

A line is added for every message sent, giving details such as the Zetafax user name, addressee name and company, the phone number, the connection time and number of pages sent.

The billing log file is analyzed by the Zetafax Report Writer which creates tabular and graphical forms that highlight faxing trends.

Fax Outbox folder

The Fax Outbox folder enables Outlook users to monitor the status of their faxes as they are submitted to the Zetafax server. Users can rush, hold and abort faxes that have been submitted to the server for sending. The fax Outbox will list all faxes that have been submitted to the server.

Note: This functionality is only available with Microsoft Exchange 5.5.

Fax wizard - Coversheet options

The **Zetafax Fax Wizard** - **Coversheet** dialog box allows you to choose the coversheet and add any content you wish to be sent with your fax, such as a subject and any notes, all information added to your coversheet is displayed to allow you to review the appearance of your fax message.

Subject
Allows you to type a subject for your email. This subject will then be displayed on the Coversheet displayed.

Add Coversheet
Allows you to choose if you want a coversheet for your fax.

Select a coversheet
Allows you choose the coversheet you wish to add.

Note on Coversheet
Allows you to type notes on your coversheet.

If your message is too long to fit on a single coversheet, your message will be automatically added to a second page.

The results of this can be displayed using the **Zetafax FaxWizard Coversheet Options - Quick view button**.

Next
Displays either the **Zetafax FaxWizard Coversheet Options** screen that allows you to select the coversheet options for the fax, or the **Text Message** screen for entering the text message.

Cancel
Cancels without sending the fax or text message.

FClass

FCLASS is the name of the Zetafax device driver that is used to control fax modems. Hence FCLASS-1 is the default name of the first fax modem attached to the Zetafax server.

Note: The number after the device name does not relate to the fax service class of the modem. For example, a Zetafax server that has been configured to use 4 fax modems would have drivers named (by default), FCLASS-1, FCLASS-2, FCLASS-3 and FCLASS-4.

Related topic

Fax class

File formats

The following file formats are supported as standard by Zetafax:

ASCII, DCX, EPS bitmaps, Epson FX and LQ series, GIF, JPEG, PCX, PICT, Targa, TIFF, Windows metafile bitmaps, WordPerfect metafile bitmaps.

Any other format file may be sent as a fax by printing from the application that created it.   Alternatively by

Related topics

How do I send a fax?
Integration with Microsoft Office

Forwarding from the Zetafax Viewer

This dialog allows you to forward pages from the fax you are currently viewing.

You can select:

All
This will forward the entire fax including any attachments.

Current page
This will send the page that is currently be displayed within the viewer.

Page Range
This allows you to specify a page range that you wish to send.

Related Topics
Forward to a Zetafax User
Forward to a fax number
Forward to mail

Group

The group of a fax device describes the method it uses to communicate with other fax devices (e.g. over the telephone PSTN). The most common group is group III.

Hewlett Packard Digital Sender

By using Zetafax and the HP Digital Sender users can convert paper documents into electronic information that can be easily shared, faxed, edited, emailed, stored and printed. You can input almost any paper document into the scanner – business cards, receipts, charts, hand-written notes, conference reports, forms and more.

Using the intuitive front control panel, you can perform all distributing, faxing, copying and printing functions from a single location. Documents can be sent to a wide variety of destinations: public and private distribution lists, pre-configured user groups, Internet email, JetSend-enabled devices, individual users, even your own desktop.
For more detailed information, refer to the **Zetafax Configuration** online help.

Integrated fax viewer

Faxes sent for preview and faxes received into the Outlook in box can be read through the Zetafax integrated fax viewer. The viewer allows you to view faxes at three different resolutions and it allows you to jump to different pages using thumbnail views. Landscape faxes can also be rotated through 90 degrees; and 180 degrees; rotation to enable you to view faxes which have been scanned in the wrong way around.

Intelligent fax boards

Zetafax supports intelligent fax boards from leading manufacturers Brooktrout and Dialogic on Windows 2000 and Windows NT fax servers. Intelligent fax boards support DID, reduce call times and transfer more of the call processing load from the fax server's main processor to the fax board.

For more detailed information, refer to the **Zetafax Configuration** online help.

ISDN

The following table explains some common terms associated with the Integrated Services Digital Network (ISDN):

Term	Description
B channel	A 64kbps data channel that can be used for voice/fax/modem calls at the same call charges as a conventional analogue telephone line (or for data calls at a slightly higher cost).
D channel	A 16kbps control channel used for setting up calls, DDI info, call cost info, etc.
BRI	Basic Rate Interface: a twisted pair copper connection which uses the same wires as analogue lines. It has 2 B channels and one D channel (2B+D). BT's service is called ISDN-2. In the UK both DDI and MSN are available over BRI. In some countries MSN is not available, and DDI is only available over PRI or multiple BRIs.
PRI	Primary Rate Interface: a fibre connection. Traditionally 30B+D, it is now also available from BT as 15B+D and even 8B+D. Note that the service is called ISDN-30 (even if only 15 or 8 channels are purchased).
Bundling	If greater capacity is needed, more B channels can be used at once (sometimes called bundling).Group 464kbps fax at 300dpi. Its use is reasonably widespread use in Germany, but practically nowhere else.
Group III bis	Faster (64kbps) Group III fax.
CAPI	An API standard for interfacing PC software to ISDN controllers or terminal adapters. Zetafax supports active ISDN controllers by making use of the CAPI interface.
Protocols	ISDN provides a raw channel for passing data, it does not specify what protocols you should use for passing information across it securely. Common examples are digitized analogue data (voice/fax/modem), X.25 (packet switched data), V.14 (async chars to 57.6kbps), V.120 (more sophisticated, often with compression and bundling), V.110 (American, similar to V.120), Group 4 (fax). It is believed that the ZyXEL and SpartaDIS hardware can do all of the list except V.110 (SpartaDIS) and Group 4 (SpartaDIS and ZyXEL). Above these sit network layer protocols such as IP or IPX (used by remote ISDN routers) and proprietary protocols used by remote bridges and programs such as file transfer packages (eg 4Sight).

If you would like more information on ISDN, you should contact your local telephone provider.

Least Cost Routing

Faxes can be routed between Zetafax servers automatically using existing computer networks (WANs) or the Internet. The advantage of this system is a reduction in fax telephone costs. This technology is called Least Cost Routing (LCR). The LCR module has been designed for use by companies of all sizes with multiple sites.

For more detailed information, refer to the **Zetafax Configuration** online help.

Letterheads

Each letterhead for use with Zetafax is stored as a multi-page graphics file.

When sending a fax, the pages of the document being sent are merged with the letterhead pages in order (as when you print a document onto letterhead and continuation paper). If there are more pages in a document file than in the letterhead, the last page of the letterhead is used for all remaining pages.

Related topics
Editing graphics files
Fax Message
How do I specify options when sending a fax?

Message Info - Recipients

This screen shows you the names and fax numbers that faxes have been sent to, along with the status of the sent fax for each recipient.

This allows you to see if a failed fax has been received by some of the recipients before it has failed or if it needs to be resent to all recipients.

Message logs

Two types of message logs are kept for viewing at a workstation. The first allows you to analyse recent activity at the Zetafax server; the second provides a transmission report for a particular document file.

Related topics

How do I get information about a message?
Logs
Storing transmission reports

Microsoft Small Business Server

Microsoft Small Business Server (SBS) is designed for companies with 25 or fewer PCs. It is an integrated solution for sharing files, databases, printers, electronic mail, fax services, applications, and other resources. Zetafax operates as the fax service for Small Business Server, and integrates with its intuitive management console, making it even easier to setup, manage, and use.

MMC snap-in

The **Zetafax Configuration** program is available as a Snap-In for Microsoft Management Console (MMC). See the **Zetafax Configuration** online help for more information.

Task Pads make it simpler for network administrators to perform routine tasks like enabling additional Zetafax users or adding devices. Console tree views allow for simpler navigation through the different tasks required to configure the Zetafax server.

Modem

Modem stands for Modulator Demodulator. A device that allows the sending of data and/or fax between computers over the telephone network.

No help available

Sorry there is currently no help available for this topic. Please check the Equisys knowledge base at www.equisys.com/support/ for more information about your problem.

Notebook computer

The Zetafax server comes with an option to install a fax server onto a notebook computer, so you can send and receive faxes while away from the office. When Zetafax starts up, it automatically detects whether your PC can connect to a network fax server. If not, a version of the fax server will start up locally, using the fax modem in your PC.

OCR

Optical Character Recognition (OCR) is used to convert a received fax image into a text file, suitable for reading into a word processor. This requires the program to look at the dots in the received image, trying to recognize the individual letters and words. Zetafax can be used with most popular third-party OCR products.

ODBC

Zetafax can link to an external data source via an ODBC link. This allows data to be set up in, for example, an Access database and used from within Zetafax.

Related topic

Using an ODBC compliant database with my address book

Performance monitor

The Windows NT performance monitor application allows you to monitor the performance of Zetafax servers either locally or remotely. It uses a number of counters to track data, such as failed faxes for a specified device. You can view this data in real time, log it for future study, use it in charts and reports, and set alerts to warn when a threshold value is exceeded. This data may be used to determine device bottlenecks and whether it may be necessary to add an additional device to your fax server.

Permissions

A number of permissions and logging options allow the network administrator to manage usage of Zetafax.

Zetafax was specifically designed for networks and because of this includes a wide range of security and permissions features. Full use is made of the file system security to protect private files such as received faxes and signatures from other users. Zetafax accounts are linked to the network login names, with the network administrator controlling:

- Who can submit urgent priority messages.
- What information users can find out about each other's use of fax.
- Who can edit network address book entries.
- Who can edit private address book entries when each user may fax (for example off-peak only). Where each user may fax (by area codes and countries).

Printer driver

Like most fax applications, Zetafax has a printer driver which allows you to convert computer files to a format suitable for faxing. The Zetafax printer driver works by taking the output from any Windows application, converting it into Group 3 TIFF format and saving the TIFF file to disk ready to be addressed. Finally, the faxable image is forwarded to the Zetafax server for sending.

Related topic

How do I send multiple documents as a single message?

Queue manager

The queue manager, QUEUEMAN, maintains queues of messages waiting to be processed. New messages are submitted to QUEUEMAN, which queues them, runs convert programs to generate the correct format for transmission, then submits the message to a free device for sending. QUEUEMAN handles device and transmission failures, re queuing and re submitting as necessary.

Routing

Zetafax can use a number of methods for delivering received faxes automatically to their intended recipient. These include giving each user their own fax number or specifying that all faxes from a given company should be sent to a particular user.

Scanning

If you have a suitable scanning device you can scan in letterheads, coversheets, and graphics for inclusion in a fax.
Zetafax can also be used with a network attached scanning device, such as Hewlett Packard Digital Sender.

Select date range

This dialog box allows you to specify a date range when performing a search for sent or received faxes which are stored in the sent Archive folder or received Archive folder respectively.

If the **To** and **From** options are disabled, select the tick boxes to enable and choose the date range from the calendar by clicking on the down arrow. Click OK to confirm the date range.

Send fax form

The send fax form makes it easier for users to address emails to fax recipients. Outlook users simply select the New Fax button, a new send fax form will appear. Once the user has entered the addressing details Zetafax will automatically store these details in the Zetafax address book.

Sender ID routing

Each fax machine (or other fax system) has a "signature" which allows the recipient to recognize who sent the fax. This is called the Station Identifier or CSID, and is usually set to the sending machine's own fax number. As an alternative, Calling Line Identification (CLI) is being introduced by most telephone companies to identify the phone number of the sender. The CLI can be used if the CSID is not configured for a received fax.

Often only one person in your company deals with a particular sender, and so wants all faxes from that company to be routed directly to them. Zetafax allows you to set up a list of sender IDs with the users faxes from those companies should be routed to.

Server-based rendering

Email users can send messages with attachments to fax recipients. Zetafax will convert the attachments and send them with your original message.

Zetafax will convert the message's attachments into group 3 TIFF format at the fax server. It does this by opening the applications in which they were created and printing to a special printer driver. This technology is known as server based rendering.

Supported applications for server-based rendering

- Adobe Acrobat
- Corel WordPerfect
- Quick View Plus
- Lotus AmiPro/WordPro
- Lotus 1-2-3
- Lotus Freelance Graphics
- Microsoft Word
- Microsoft Excel spreadsheets
- Microsoft Excel charts
- Microsoft PowerPoint
- Most major graphics file formats

SMTP email gateway

Zetafax now has an email gateway for SMTP mail systems which allows network users to send and receive faxes just like email.

Station ID suffix

If you are sending a fax to another Zetafax system, you can specify the recipient's user name to cause the fax to be routed directly to that user. This is done by adding the user name to the end of the destination fax number, separated by a colon (e.g. "012 345 9876:SAM"). You can also set up other routing names for use with this mechanism such as extension numbers or descriptive names (for example "SALES").

The user name or parameter is sent to the remote fax system by adding it to the end of the station identifier, or CSID. This is the identifier programmed into all fax machines and printed on the top line of faxes they send, and is usually set to the sender's fax number. Sometimes called "colon routing", this routing method is also supported for faxes sent to and from other PC fax systems. ITU sub-addressing or T30 sub-addressing

The Group III fax specification has recently been extended to allow for sub-addressing in addition to the basic fax number. At first only fax software will support this, but in the future expect to see fax machines with an extra button or two. It works in the same way as Sender ID extension routing, as described above.

Storing transmission reports

Zetafax keeps a detailed log of all sent faxes, together with any errors which occurred. The Zetafax Client provides several options for viewing these, including: All faxes sent by the user today. All errors reported by the fax device. All errors which occurred on the current message.

This log is generally kept for just a few days, since the high level of detail it gives is not normally needed after that time.
Additionally, each user can decide whether they want Zetafax to store transmission reports for faxes which they send. These list the options used when the document was last faxed (whether a coversheet and letterhead were used, etc), together with the people it has been sent to, and when.

If you enable this feature, then this record is kept indefinitely, and is stored in the same directory as the original document file which it refers to, in a separate text file called ZETAFAX.DIR (one per directory). This facility enables you to look at a directory on the screen and quickly see what has been sent, with a long-term record of the exact date and time of transmission. It also means that in companies which regularly send certain files, the options used to send these files will be remembered and used for subsequent transmissions.

Related topics
Server Logs dialog box
How do I get information about a message?
FAX.LOG

Sub-address routing

Sub-address routing is the most direct of the automatic routing methods available, allowing the sender to specify the intended recipient directly. There are four different methods of doing this.

Text Message

This screen allows you to enter the text message and choose the options for sending the message.

Message

Enter the content of the message in this box. Text messages can only contain 160 characters. As you type the message you will see a counter update. This counter shows the number of remaining characters that a single message can contain.

Send in single message

The message will be sent as a single text message and is subject to the limit of 160 characters. Remaining characters
The number of remaining free characters that can be added to the text message.

Send in multiple messages

This options will split the text in multiple message installments.

Time

Set time to send text message.

Priority

Set priority for text message.

Back

Takes you back to the **Text Message Addressing** screen that allows you to select the recipients for the text message.

Finish

Submits the text message

Cancel

Cancels without sending the text message.

TIFF

Zetafax uses a multi-page fax TIFF (Tagged Image File Format) format for fax images. For more information, see File formats.

Transmission reports

Zetafax can store and print transmission history for each fax sent via the Zetafax server. Users can view transmission reports for each fax submitted via their Zetafax Client, and network administrators can configure the Zetafax server to automatically print a transmission report on a network printer for each fax sent successfully.

Related topics

Logs
Storing transmission reports

Usernames

When sending faxes a number of settings such as coversheet, letterhead, and time to send are used.

Parameters like these use defaults stored for the user in the first instance. These defaults can be changed to apply for all future messages.

Viewer

Faxes sent for preview and faxes received into the Outlook in box can be read through the Zetafax integrated fax viewer. The viewer allows you to view faxes at three different resolutions and it allows you to jump to different pages using thumbnail views. Landscape faxes can also be rotated through 90° and 180° to enable you to view faxes which have been scanned in the wrong way around.

Zetafax Login

To use Zetafax you must be logged in to the Zetafax Server using an account name. In most cases you can use your Windows Account name to log in, alternatively Zetafax Account name can be given. The Zetafax login dialog box will be displayed whenever you launch the Zetafax Client unless you check the Don't ask me again box.

Zetafax Server

The Server that you wish to Logon to - All previously accessed servers are available from a drop down list, with the last server accessed displayed. To change to a new server, browse to the desired location using the browse '**...**' button.

Windows Account

Uses your current Windows Account to log on to Zetafax

Zetafax Account

Uses your Zetafax Account to log on to Zetafax. Your Zetafax Account may be different to your Windows Account.

Don't ask me again

Select this option to automatically logon to the Zetafax Client without being prompted for your Username.

OK

Attempts to login using the Zetafax username entered.

Cancel

Exits Zetafax without attempting to login

Zetafax Report Writer

The Zetafax Report Writer can generate a number of graphical and tabular reports that highlight faxing trends on a company's Zetafax server.

The Zetafax Report Writer analyses information from the Zetafax server's fax log file and can output information based on the user which sent the fax; a summary of the destination of faxes sent, eg by country or by telephone number; or to highlight peak fax usage times by time of day and day of week. Reports can then be viewed on screen, printed or exported to a number of different formats for analysis.

Fax/Text message addressing

This dialog box is for specifying the intended recipients of a fax or text message. It is invoked from the New command, or whenever any application prints to the Zetafax printer (fax only). It also appears once a document has been scanned using a TWAIN scanner or when a text or graphics file is dragged from the File Manager and dropped on the Zetafax client.

Name
The name of the recipient or the address book unique name or group name of the intended recipients. Group names must start with an "@" character.

Organization
If the addressing details are going to be entered directly (ie an address book name was not entered in the NAME field), then the organization may be entered.

Fax number
If an address book name has not been entered, the fax number should be entered directly. A comma signifies a pause when dialling. A number starting with an "x" indicates an internal phone extensions.

If you enter a question mark ("?") in the NAME field, full details of the recipient can be entered. This is not normally recommended, since it is as quick to add a new entry to the address book, which can then be used if you want to send to the person again (see the NEW button, below)

The intended recipients for the fax message are displayed, including those within groups. Any address book duplicates are indicated as such and are not sent to twice.

Mobile number
If an address book name has not been entered, the mobile number should be entered directly.

Add to list
Adds the details in the Name, Organization Fax number or Mobile number fields to the List of recipients.

Remove
Removes the selected name from the List of recipients or from the Previous Recipients list.

Search
Clicking on this button will allow you to search an address book for recipients. Either the mail address book or other address books can be searched. By default the mail address book is used. You can change the selected address book to search by pressing the drop down list and selecting from **Mail address book, Other address book**. Zetafax will remember your last choice and it will be used the next time you press the Search button. View
If the message is a TIFF fax file, it may be viewed prior to addressing and selection of options such as coversheet and letterhead.

Save as
The message file may be saved to a specific directory. This is a simple way of creating attachment files, letterheads and coversheet backgrounds.

Multi-doc
This option allows you to start a multi document fax. If you select this option you can then print further documents to the Zetafax printer and have them added to the same fax.

Previous recipients
The last 1000 people you have addressed a fax or text message to are listed in this window. Double click or

press **Add to list** to add to the list of recipients.

Sort by

The ordering of the **Previous recipients** list may be selected in reverse time order or in alphabetical order of name or organization.

Next

Displays either the **Zetafax FaxWizard Coversheet Options** screen that allows you to select the coversheet options for the fax, or the **Text Message** screen for entering the text message.

Cancel

Cancels without sending the fax or text message.

Zetafax options

This screen allows you to choose the send options for the fax.

When you first access this screen, you will be shown a summary of the options that are currently selected, as well as the charge code to use, attachments button and a hold option.

To access additional options, select a tab from the top of this dialog.

Charge code

The charge code for this message. To alter the list of charge codes select the *Edit Charge Code list...* item in the list - this will display the **Charge Code** dialog.

This option is invisible if charge codes are disabled.

Attachments

Attach graphical documents stored on the Zetafax Server or any documents on the Network that are in one of the following formats*:

- Word Files
- Excel Files
- PowerPoint Files
- PDF documents

*This list is increased with up to 250 other file type included if the DOCTIFF document conversion addin has been installed on the server.

Hold for full Preview

By selecting this option, the fax is prepared for sending, and left in your Outbox, this allows you to check your fax before sending it.

Quick view

This button allows you to see you fax job, including any Client rendered attachments as it will appear in the final fax.

Letterhead

Selection of letterhead to use. If selected, this letterhead will be applied to the first document that has been attached to your fax.

Priority

Set priority for fax message.

Resolution

Select one of Draft, Normal or High resolution. In general for faxes, Draft is sent in Standard mode (100x200 dpi) and High is sent in Fine mode (200x200 dpi). The setting used for "Normal" resolution depends on the system configuration.

Time

Set time to send fax message.

From

Provided by the default Full Name field. This can be overridden for this message.

Back

Takes you back to the **Zetafax Coversheet** screen that allows you to select the coversheet to be used,

what notes you wish to add to your coversheet and the subject of your fax.

Finish
Submits the fax

Cancel
Cancels without sending the fax.

ZSUBMIT

The APIs ZSUBMIT program lets DOS, mini and mainframe programs send faxes by creating text files in a shared directory on a file server. For example, faxing purchase orders or invoices usually only requires adjusting an accounts packages report writer.

A text file needs a few lines added to give the fax number and message options. Logos and signatures can be included and the text may be merged onto a multi-page form using the letterhead feature in Zetafax. This approach gives results rapidly.

Related topic

Application Programmers Interface (API)

Index