TerraFaxPro 1.3.1
Administration and User Guide

Document Revision: 1.0
Document Information

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<td>1.1</td>
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<td>PartNumber</td>
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<td>1.0</td>
<td>13/07/2010</td>
<td>TerraFaxPro 1.3.1</td>
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<td>1.1</td>
<td>06/10/2010</td>
<td>Added some features</td>
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1 Introduction

1.1 Legal statements

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1.2 Preface

This document is part of the official documentation of Mida Solutions products and details functionalities, user interface, options and working modes in detail. The system allows the user to configure all system functions using a simple and intuitive WEB interface. Please refer to the reference table for a complete list of documents relevant for system configuration.

1.3 Audience

The present document addresses both end users and system administrators of Mida products.

1.4 Notations

This document highlights, where possible, the main parameters and operations through bold or italics text and all parts that might be critical during system configuration or use. Critical parts are also marked with the Warning symbol reported here on the left.

1.5 References

This manual includes references to the following list of documents:
2 TerraFaxPro User Guide

2.1 Web Interface

2.1.1 Basic user Home page functions

In order to use Mida TerraFaxPro the user must reach the intranet address of the fax server system and authenticate using his username and password;

Different user profiles exist, this section details the case of basic user system access.

![Fax Server User Home Page](image)

Standard users can perform the following operations from the WEB page:
- Manage their profile, including their password
- Manage their personal contacts and access shared contacts
- See their fax inbox/outbox (received, sent and scheduled)
- Send faxes

For the first two general user portal functions please refer to [1].

Users can access to the main fax server function by clicking on the home page icons or by opening the Fax Server section menu available on the left side.

2.1.2 Send a Fax

This page allows sending faxes from the web interface. Here the user can chose one or more files to be sent as faxes to a list of recipients.

On the top right corner, the user can chose the fax box to be used for sending the given fax. In general the default fax box is selected and the user does not need to take any action if he is associated to only one fax box.

Clicking on the **Browse...** button the user can pick up the file to be sent. Supported file formats are:
- Microsoft Office 2000/2003: DOC, XLS, PPT, PPS
- Microsoft Office 2007: DOCX, XLSX, PPTX, PPSX
- Open Office: ODT, ODS, ODP
- Adobe Acrobat: PDF
- Images: TIFF, JPG, JPEG, GIF
- Other: RTF, PS, TXT
Multiple files can be sent in the same fax transmission by clicking on **Add File**.

![Send Fax Page](image)

**Figure 2: Send Fax Page**

The Recipient text box is used to insert new destination fax numbers. Users can insert here plain phone numbers, e.g. "02 1234567", or a contact name or a distribution list name. The user is helped with suggestions while typing the contact or list name. Clicking "Add to recipient" will add the text box content to the recipient.

Inserted Files and destination numbers can be deleted by simply clicking on the red x on the file/contact left.

Additional parameters can be edited by opening the Send Parameters section:

- **Notify successful transmission** flag: if enabled the server will send an email notification once the fax is successfully sent
- **Notify all tries** flag: if enabled the server will send an email notification every time it attempts to send a fax
- **Priority**: to switch between the different fax priority options. Possible options are:
  - Normal (default)
  - High
  - Low
- **Scheduling**: if enabled will open the date and time sections where the user can choose to schedule the fax transmission at a given day and time

Eventually, the fax can be sent, or scheduled, by clicking **Send Fax**.

### 2.1.3 Fax Inbox/Outbox

This page allows users to search among received and sent faxes. The system provides also a list of faxes being processed by the server.

Available sections are:

- **Received**: providing the list of received faxes
- **Sent**: providing the list of sent faxes
- **Outgoing**: showing the list of faxes that are being sent

Figure 3 shows an example of inbox/outbox page.
Figure 3: Inbox and Outbox Page

On the top right corner the user can chose a specific fax box or can search on all accessible fax boxes. The level of visibility depends on the user profile and on the fax boxes rights configured.

Every fax is reported with details of the documents and the possibility to preview and download/open it.

In the **received** section there is a table that contains all received faxes and the following information:

- **Fax ID**: fax identification number (automatically assigned by the fax server)
- **Date**: date when the fax was received
- **Time**: time when the fax was received
- **Sender**: sender’s number (or his identification string)
- **Recipient**: recipient’s number
- **Pages**: number of pages received
- **Read**: indicates if the fax has been read or not by a user
- **Options**: preview/read and delete

This icon is providing the link to the PDF version of the fax for download and reading options.

A mouse over opens automatically a small preview.

This icon allows users to delete a given fax document. A warning dialog box will open to ask for confirmation.

The search box can be used for searching received faxes with a given sender number.

The Inbox/outbox page shows also a table that contains, by default, recent **sent** faxes with the following information:

- **Fax ID**: fax identification number
- **Date**: date when the fax was sent (in case with scheduling)
- **Time**: time when the fax was sent (in case with scheduling)
- **Recipient**: recipient’s number and username
- **Status**: Successfully sent (green lamp) or error (red lamp)

Fax sent successfully, no errors occurred
An error occurred and the fax has not been sent

Options: preview/read and delete

This icon is providing the link to the PDF version of the fax for download and reading options.
A mouse over opens automatically a small preview.

This icon allows users to delete a given fax document. A warning dialog box will open to ask for confirmation

The search box can be used for searching sent faxes with a given recipient number.

Outgoing faxes are listed in the last section and contains a list of faxes only if there are outgoing faxes that are being sent. In this section the end user can follow the sending process, the number of sent pages and possible transmission problems, if there are any. Moreover, you can cancel a transmission using the delete command.

2.2 eMail to Fax

2.2.1 Sending a fax from an email client

The Mail2Fax feature enables users to send fax documents using the preferred email client. Any registered user of Mida TerraFaxPro assigned to at least one faxbox and enabled to email to fax service, can send a fax by sending an email.

The email has to be sent by the registered email account and has to be compliant with the following specifications:
- **TO:** email address of the fax server reserved account, for instance: fax@companyname.com
- **SUBJECT:** the recipient fax number or a fax number list separated by comma, for example: 0049124345,041728234
- **ATTACHMENT:** the documents that you need to send. See 2.1.2 for the list of the supported formats.
- **BODY:** can be left blank. Anything that is written here is sent as a fax page before the attached documents.

If multiple documents are attached to the email, a single fax will result with the following items:
- Cover (if enabled in the system settings)
- Mail body
- Attached documents

Moreover, it is possible to specify in the subject and the destination name of the fax cover, by formatting the email’s subject field in this format:

```
Destination Number __:_ Destination name __:_ Cover subject
```

Where "_:_" is used as separator string.

![Figure 4: Example of email to be sent to TerraFaxPro](image-url)
An example of email is shown in Figure 4 and the resulting cover is shown in Figure 5.

Figure 4: eMail to Fax example

Figure 5: eMail to Fax resulting cover example
3 Administration Guide

3.1 Fax Server Administration

3.1.1 Fax Server Administration Menu

Mida TerraFaxPro administration pages can be found under the “Application” / “Fax Server” menu. These pages are visible only if the system is properly licensed for fax server service.

The fax server administration pages are:

- **Configuration**: The main fax server configuration page. All fax server main configuration parameters are managed here.
- **Fax Boxes**: The fax boxes configuration page; Mida TerraFaxPro allows creating a number of virtual fax boxes that share the common fax server resources; the fax server needs at least one fax box for each phone fax number
- **Control Panel**: Pages providing information on the fax service status
- **Dial Rules**: Used to configure the least cost routing prefix rules for outgoing faxes

The steps to take to set up a fax server for the first time are:
1. Make sure you have a valid license key and at least 2 channels enabled (ref. 3.1.5)
2. Ensure you have configured the right protocols and gateway address (ref. 3.1.3)
3. Create at least one fax box and assign a fax number to it (ref. 3.1.4)
4. Make sure that at least one user exists and that it is assigned to the fax box (ref [1] and 3.1.4)

The following sections provide details on all relevant pages to be used to configure the fax server services.

3.1.2 Fax Server profiles

Mida TerraFaxPro, like all Mida applications, has three predefined user profiles:

- **Users**: extends the portal access to Send Fax (see section 2.1.2) and Fax Inbox/Outbox (see section 2.1.3) under the User menu;
- **Supervisors**: same as Users;
- **Administrators**: extends the portal access to the fax server administration menu (see 3.1.1) under the Administrator menu.

Please note that it is in any case possible to create "special users" that have read access to multiple fax documents received through different numbers by assigning them to the required fax boxes (see 3.1.4).

In a standard system including only the main portal functionalities and the fax service the following three final profiles result:

- **Users**: can access all menu items under the User menu, can edit his/her profile, can see shared contacts, can edit his/her personal contacts, can access Send Fax (see section 2.1.2) and Fax Inbox/Outbox (see section 2.1.3);
- **Supervisors**: can access all pages accessible by Users and can also access to the Administrator menu items Home and Contacts. A Supervisor can therefore manage shared contacts, manage distribution lists, contact groups etc;
• **Administrators**: can access to all portal User and Administrator menu pages

### 3.1.3 Main Configuration Page

The main configuration page is the starting point for configuring the fax server service. This page includes a set of advanced telephony settings and all fax server default settings. Any unspecified setting is then turned into the system default value set in this page.

This page is divided in 5 sections:

- **Fax Protocol Configuration**: including the SIP or H.323 and T.38 fax protocol configuration options
- **Default Telephony Configuration**: including fax server main telephone number, TSI, etc.
- **Parameters**: Fax transmission main default parameters
- **Default Cover Fields**: Main default cover fields
- **Fax to Email and Email to Fax Configuration**: main default account for email to fax and fax to email services

![Configuration](image)

**Figure 7: Configuration page: The five available sections**

**Figure 7** shows the five sections available under the Configuration page.

The Fax Protocol Configuration section has a large set of configurable protocol settings that may vary depending on the selected protocols.

The signaling **protocol** can be selected using the first radius buttons. Available options are:

- **SIP**: for Session Initiation Protocol
- **H323**: for H.323 signaling protocol

**Figure 8** shows the main settings available for the SIP signaling protocol case.

When selecting SIP, the administrator has the possibility to select the IP address of the main default proxy to point at (PBX or voice gateway) for outgoing traffic. The PBX or voice gateway address can be selected from a drop down list.

**To add devices to this list please refer to [1] under Administrator Interface, Network, where the administrator can define the various network elements that are relevant for Mida applications.**

An optional list of **Proxy Servers** can also be filled in case the administrator wants the server to implement the special **failover option**.

---

1 Might differ when the system is working in multi-tenant mode.
**SIP Failover Option**

When operating in SIP mode, TerraFaxPro can implement a special fail over mechanism suitable to manage faulty network situations. Administrators may wish to configure the software so that it makes a call to one IP address and if the device at that IP address does not respond, the SR140 software makes a call to another IP address. This behavior may provide failover from one gateway to another gateway or from one call manager to another call manager, or from one SIP proxy to another SIP proxy.

In this case a list of proxy servers to be used has to be specified in the four text boxes available. The system can manage up to 4 failover proxies. The software will move to the next sip proxy server if a call fails. The first entry will be used for all calls made by the fax server, up to the moment that that IP address is down, then that call will fail. The application will retry the call it will use the second entry. On the next call, the fax server will continue using the second entry, until it fails.... And so on.

Two conditions will cause failover to another proxy.

1. When the server doesn’t receive a response and a local timeout occurs.
2. When SIP Session Refresh is enabled and the server doesn’t receive a 422 message.

Please note that if a specific SIP proxy is defined in a give fax box then the proxy configuration is bypassed and the failover option will not take place for the given fax box. Hence, the support of failover is given only for fax boxes using the default fax server configuration.

**Advanced Parameters**

Additional parameters, described here below, can also be regulated, anyway make sure you are aware of the changes you want to perform. The standard configuration is proven to work with a large set of devices and vendors; hence try first using the standard default parameters provided by Mida Solutions.
Advanced protocol settings available are (see Figure 8):

- **Fax Protocol:**
  - T.38 Only: setting the fax to work in pure T.38 mode
  - T.38 First: setting the fax to work in T.38 and in case fall back to G.711 pass through (useful when T.38 is not supported by all apparatus)
  - G.711: setting the fax to work only in G.711 mode (not recommended)

- **T.38 Timeouts:**
  - Timeout before switching to T.38 for inbound calls: in ms
  - Timeout before switching to T.38 for outbound calls: in ms

- **RTP Codec,** to choose between:
  - A law
  - U law
  - Both

- **V.34:** to enable or disable V.34 support

- **Error Correction Mode (ECM):** to enable or disable ECM during fax transmissions

If **G.711 pass through mode** is enabled, by selecting T.38 First, two additional pass through timeouts can be adjusted (see Figure 8):

- Timeout before switching to G.711 passthrough for inbound calls: in ms
- Timeout before switching to G.711 passthrough for outbound calls: in ms

![Figure 9: Configuration page: Fax Protocol Configuration (H.323 example)](image)

If **H.323 protocol** is selected a set of specific H.323 configuration parameters will be available (see Figure 9):

- **PBX or Voice Gateway:** IP address of the default H.323 gatekeeper to point at for outgoing faxes
- **H.323 alias:** H.323 alias to be used
- **Enable H.245 Tunneling:** flag to enable or disable H.245 tunnelling
- **Enable H.323 Fast Start:** flag to enable or disable H.323 fast start mode
- **H.245 Stage:** Can be set from 0 to 7, default value set to 3

Also in the case of H.323, adding nodes to the PBX or Voice Gateway list please refer to [1]under Administrator Interface, Network, where the administrator can define the various network elements that are relevant for Mida applications.
The **Default Telephony Configuration** section includes the following parameters (see Figure 10):

- **Outgoing Fax Number**: fax number, CLI (Calling Line Identification), used for outgoing calls; Shall be left blank in order to use only the fax box CLIs or can be used as common prefix for all outgoing faxes.
- **Use Fax Box CLI**: if enabled the fax server will add to the outgoing fax number, if present, the specific fax box CLI (Calling Line Identification). If not enabled all outgoing faxes will use the same common CLI.
- **Local Identifier (TSI)**: Fax Server Transmitting Subscriber Identification string.

The **Parameters** section includes a set of fax transmission parameters. Default fax server settings are here configured. Available parameters are (see Figure 10):

- **Resolution**: that can be set to High or Low
- **Offset prefix**: prefix used for outgoing calls
- **Max dial attempts**: maximum number of dial attempts in case of fax transmission failures
- **Max tries**: max number of fax transmission tries
- **Enable Images**: enable/disable images in fax transmissions
- **Tag Line**, where the administrator can chose to use:
  - The local TSI (Transmitting Subscriber Identification)
  - Name: First name and Last name of the user sending the fax
  - Number: fax server number

**Default cover fields** can be configured under this section (Figure 11) and the available parameters are:

- **Enable Fax Cover**: to enable or disable fax cover functionality
- **From Number**: From number to be written in the fax cover
- **Address**: location or address string to be inserted in the fax cover
- **Company**: company name to be inserted in the fax cover

The **Fax to Email and Email to Fax Configuration** setting is needed to configure the default fax to email and email to fax service settings. These settings are used for sending or receiving emails related to fax transmissions.

![Figure 10: Configuration page: Default Telephony Configuration and Parameters](image)

System email accounts shall be defined under the general system administration portal page, please refer to [1], under the email configuration section.

Available parameters under this section are:

- **Fax to Email default Account**: sending email account to be used by the fax server for sending emails to users (fax to email service)
- **Email to Fax default Account**: receiving email account to be used by the fax server for receiving email requests from the users (email to fax)
- **Sender Name**: Sender name to be used in the email sent by the fax server
- **Sender Address**: Sender address used by the fax server
- **Share FaxBox notifications**: if enabled, all email notifications such as fax transmission attempts and fax transmission completed are shared between all relevant users of a given fax box; if disabled, notifications will be sent only to the user that started the fax transmission.
- **Enable Send Email Body**: if checked, the system will add the email text body to the fax to be sent; if disabled, the email text body will be discarded
- **Catch All Email recipient**: allows defining a catch all email address where all faxes sent to a wrong CLI will be redirected

![Figure 11: Configuration page: Default Cover Fields and Fax to Email and Email to Fax configuration](image)

### 3.1.4 Fax boxes Configuration

Fax Boxes are virtual fax machines that implement the actual fax server function. In order to send or receive faxes a user has to be assigned at least to one fax box. Fax boxes are the link between fax server and users, thus allowing maximum flexibility of the TerraFaxPro solution. Among others, the main benefits of the fax box approach are:

- Possibility to implement easy distribution groups for incoming faxes
- Possibility to implement user based routing for outgoing fax
- Possibility to manage multiple fax numbers for a given user
- Possibility to distribute fax numbers according to the organization structure

Fax boxes are configured in the **Fax Boxes** page where the list of configured fax numbers is provided in a paginated fashion (see **Figure 12**).

![Figure 12: Fax Boxes configuration page](image)

Configured fax boxes are reported in a simple table and fax boxes can be searched using the search text box available on the upper right corner. The searching criteria is based on the fax box phone numbers.

Each fax box is presented with the following information:
• **Fax Box ID**: unique fax box identifier
• **Fax Box Phone Numbers**: Calling Line Identification (CLI) and optional CLI for internal calls separated by ";,"

Two actions buttons on the right of each available fax box are available for editing and deleting purposes.

This icon is providing the link to the fax box edit page. A mouse click opens the fax box page where all details and configurations are accessible (see following paragraphs for details)

This icon allows administrators to delete a given fax box. All fax documents related to the fax box will be lost! A warning dialog box will open to ask for confirmation.

A new fax box can be added to the system by clicking on **Add a new Fax Box** link, available on the upper right corner of the page. This action opens a page like the one shown in Figure 13. This page is organized in five sections:

• **Fax Numbers Configuration**: where to set the fax box CLI information
• **Cover Fields**: where configuring optional cover data specific for the given fax box
• **Fax Configuration**: for special Tag line and TSI settings
• **Advanced Fax Configurations**: where configuring optional specific settings for the given fax box, such as PBX or voice gateway (if different from the default one described in section 3.1.3), printer, etc.
• **Fax to Email and Email to Fax Configuration**: where to set a specific account to be used for email services, if it has to be different to the default one (see section 3.1.3)

![Figure 13: Fax Box editing page](image-url)

When a new fax box is created an additional section appears called **Fax Box Users** providing the main interface for associating users to the given fax box.

The **Fax Box Configuration** section includes the following parameters:

• **Calling Line Id (CLI)**: specific calling line ID (CLI) for the given fax box. This is added to the default system CLI or it is not used at all, depending on the settings discussed in section 3.1.3
• **CLI for internal calls**: optional CLI for internal calls (calls between internal numbers). Internal calls are detected looking at the outgoing dial prefix
• **Outgoing Dial Prefix**: Optional parameter defining the outgoing dial prefix

The **cover fields** section can be used to set specific fax box data in the cover. If this is left blank, the default data will be used. The available parameters are (see Figure 14):

• **Company**: Company name to be inserted in the cover
• **Address**: Address string to be inserted in the cover
• **Cover File**: cover template file to be used. Please contact Mida Solutions for information on how to get customized cover files

The **Fax Configuration** section allows specifying the following settings for the given fax box (see Figure 14):

- **Tag Line**: can use the TSI, the name or the Number
- **Transmitter Subscriber Identity (TSI)**: string to be used as TSI

**Figure 14: Fax Box editing page (first 3 sections)**

**Figure 15: Fax Box editing page (last 3 sections)**
The **Advanced Fax Configuration** section (see Figure 15) allows setting the following parameters:

- **PBX or Voice Gateway**: a given fax box can point at a specific gateway/gatekeeper for outbound traffic instead of using the default one. This can be used to implement user based routing policies allowing users to decide from which site to send a fax. Please note that this setting will automatically disable the failover option in case it is configured.

- **Printer**: a drop down list of the available network printers can be used to assign a printer to the fax box. If configured it will automatically print all received faxes on the given fax box.

- **Upload External Plug-in**: This is a drop down list of additional plug-ins that may be used to perform additional actions.

The **Fax to Email and Email to Fax Configuration** section can be used to insert specific email account settings for the selected fax box. Please remember that if these fields are left blank, the default email settings will apply (refer to 3.1.3). Available parameters are (see Figure 15):

- **Sender**: sender name to be used
- **Sender address**: sender email address to be used
- **HTML email format**: a check box to choose between HTML email format or plain text
- **Fax Box Email Account**: email account to be used for email to fax services related to the selected fax box
- **Fax to Email account**: email account to be used for fax to email services related to the selected fax box

System email accounts shall be defined under the general system administration portal page, please refer to [1] under the administrator, email configuration section.

At least on user shall be assigned to a fax box. The **Fax Box User** section can be used to assign one or more users to a fax box once this is created. The link Add User to FaxBox can be used to open a window where searching and selecting users. Multiple users can be selected if needed.

For each user the following parameters can be set (see Figure 15):

| ![Home] | Set as default fax box for the user |
| ![User] | Enable reading rights for received faxes for the user |
| ![Out] | Enable sending rights on the given fax box for the user |
| ![Email] | User email address to be used for email services; Available only if the user has a valid email configured |
| ![Fax] | Enable email to fax service for the user (only if a valid email address is selected) |
| ![Success] | Enable success email notifications (only if a valid email address is selected) |
| ![Failure] | Enable failure email notifications (only if a valid email address is selected) |

Email notifications related to a given fax box can be shared among all applicable users of a given fax box or can be sent only to the relevant user. This is a system setting and can be regulated under "Fax to Email and Email to Fax Configuration", see section 3.1.3.

### 3.1.5 Fax Server Control Panel

The Fax Server Control Panel is where administrators can start and stop the fax server service and check the status. A list of enabled channels provides details on available fax over IP resources.
Available action buttons are:

- Start the Fax Server service.
  Available only if the service is not running.

- Stop the Fax Server service.
  Available only if the service is running.

- Restart the fax server service.

### 3.1.6 Dial Rules

The outbound fax routing rules can be configured under the Dial Rules section, Figure 17. This page allows the configuration of routing rules for outgoing faxes. The administrator can configure the system to address different voice gateways or IP PBX depending on the called number prefix.

The prefix for outgoing calls is an optional text box field. If filled, it enables a common prefix for all outgoing faxes. This may be needed by the PBX, depending on its configuration; for example a leading one might be needed to get the PSTN line (see Figure 17). If this field is left blank, the default routing rules specified in the main configuration pages or specified by the fax box (see sections 3.1.3 and 3.1.4) will be used by the fax server.

Administrators can define also multiple routing rules for outgoing faxes. For example, he can choose to forward all the outgoing faxes with the same prefix to a selected IP address that can represent a specified gateway. In the example of Figure 17 all the outgoing faxes with prefix 99 are forwarded to the gateway with IP address 192.168.0.24. Other faxes will be forwarded to the default gateway, specified in the main configuration pages or specified by the fax box (see sections 3.1.3 and 3.1.4).

⚠️ In general dial rules, if present, are processed by the system before any other routing rule.
Multiple dial rules can be configured in the system and at any time administrators can decide to delete a given dial rule. A dial rule is defined by the following parameters:

- **Leading digits**: is the prefix number to be checked by the system for outgoing calls in order to implement called number based routing rules
- **Gateway IP address**: Specific gateway IP address to point at

⚠️ **Please note that fail over options are automatically disabled when a dial rule occurs.**

Available action buttons are:

This icon allows administrators to delete a given dial rule.