

Fax Forwarding Feature: Configuring the WorkCentre 77xx Series Customer Tip



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Overview

The Fax Forward feature allows the device to be configured such that faxes coming into the device are forwarded to an email address, or group of email addresses and/or filed on an SMB (Server Message Block) file destination. Based on configuration the incoming fax could also be printed while being forwarded. There is also no need to worry about lost faxes. If there is an error that prohibits the forwarding of the fax, the device can be configured to print the fax at the device when such an error occurs.

Other key characteristics of this feature include the ability to:

- Set up and save fax forward rules easily for changing work practices.
- Customize file names so you can tell your faxes apart.
- Choose from output formats including PDF, TIFF, and XPS.
- Receive email notifications that a new fax has been posted on the SMB file share.

Prerequisites

- To take advantage of this feature the device must be at software version 060.090.009.34821 or greater.
- The Fax Line that the rule will be applied to must be installed, enabled, and configured to either **'Send and Receive'** or **'Receive Only'**. For directions to enable fax please consult the System Administrator's Guide.
- If Forwarding to Email the SMTP server must be configured. For directions to configure SMTP please consult the System Administrator's Guide.

Configuring Fax Forward

These steps guide you through the setup of the Fax Forward feature. The setup is split into three sections which may need to be completed depending on what type of Fax Forwarding is needed.

A key feature of fax forward on this product is the ability to create rules. Rules make it easy to set up for flexible use of fax forward, for example if one person is covering for another during vacation. Up to 5 rules can be defined. One rule can be applied to each enabled fax line. All incoming faxes on that line will be forwarded according to what the rule specifies. If the device is configured with two fax lines, but one is configured as Send Only, you will still be allowed to configure and apply a Fax Forwarding rule for that line. That rule would not be executed until the fax line is no longer set up to be Send Only.

General Setup

The steps in this section need to be following no matter what Fax Forwarding option is chosen.

1. Launch a web browser of your choice and enter the device's IP address.
2. Select **Properties** and enter the administrator password when prompted. (default **User ID = admin ; Password = 1111**)
3. On the left hand side of the window select **Services → Embedded Fax → Fax Forward**.



4. To add or edit a Fax Forward rule select one of the **Edit** buttons within the **Fax Forward On Receive** page. This will open that rule's configuration page.
5. Within the **Based On Rule** field you may choose to base the new rule on an existing rule. If a new rule has similar attributes to an existing rule you can choose the existing rule and pre-populate the configuration fields with its attributes. This feature could save time entering information. If there are no existing rules the default and only choice would be **Default Settings**.

Note: If a new rule is based on an existing rule, any passwords associated with the existing rule will NOT be copied.

The image shows the 'Fax Forward On Receive' configuration page. The 'Based on Rule' dropdown is set to 'Default Settings'. The 'General' section contains the following fields: 'Rule Name' (text input), 'File Format Type' (dropdown menu set to 'PDF - Image Only'), and 'Print Local Copy' (dropdown menu set to 'On Error Only').

6. Configure the **General** section as described below, all fields are required.

| | |
|--------------------------|---|
| Rule Name: | A name that will uniquely identify the rule. |
| File Format Type: | Select which format you would like the fax document to be converted to before it is sent to an email or an SMB location. The choices are: <ul style="list-style-type: none"> • PDF – Image Only • PDF – Searchable • XPS – Image Only • XPS – Searchable • Multi-Page TIFF |
| Print Local Copy: | <p><u>On Error Only</u></p> <p>By selecting this option you are choosing to print the incoming fax and an error report, if there is an issue with forwarding the fax to either email or SMB location.</p> <p>Note: If a Fax Forward job is printed due to an error, the error report will indicate that an Email job failed. If forwarding to an SMB location fails, the error report states the failure and the SMTP Server IP address/hostname is displayed.</p> <p><u>Always</u></p> <p>By selecting this option you are choosing to print the incoming fax locally at the device, as well as forwarding the fax to an email and/or SMB location. If an error is encountered with forwarding the fax to email or email location, an error report will produced as well.</p> |

Forward to Email Setup

This section describes the fields that need to be configured for Fax Forwarding to email to be successful. If you are not setting up email please proceed to the 'Forward to File Destination' section.

| | |
|---|--|
| Email: | Click on this box to enable the fields in this section. |
| Address 1 → 5: (One Required) | Enter the email address or addresses to which the incoming faxes will be forwarded to. Note: The email address can be a Distribution List (DL). |
| From Address: (Required) | Enter an email address that will identify the sender of the email. |
| From Name: (Optional) | Enter a name which will identify the sender of the email. |
| Subject: (Required) | Enter a subject that will be used on every fax forwarded email. <i>The default is: Fax Forward from a Xerox WorkCentre</i> |
| Attachment Name: (Required) | The default file name is Fax . However, you may configure a custom file name by selecting the Customize button. You may choose to include the date (YYYYMMDD) and/or time (HHMMSS) within the attachment's file name. There is also the ability to add custom text to the file name. To enable a field you must click on the associated box before entering the text. Note: Only alphanumeric characters are allowed for email attachments. No delimiters or spaces will appear between text items. Clicking on the choices will make them appear within the Position field. Once you have added the Display options you may move the customized attributes, with the up and down arrows, to a position within the file name. The top attribute will be the attribute at the start of the file name. |
| Message: (Optional) | This is the text that will appear within the body of the email message. This is a free form field, but only alphanumeric characters are allowed. |
| Signature: (Optional) | This text in this field will appear under the body of the message. |

If you have completed setting up the rule, click on the Apply button and proceed to **Applying a Fax Forward Rule** section. If you would like to also configure a file destination proceed to the next section.

Forward to File Destination

This section describes the fields that need to be configured for Fax Forwarding to File Destination to be successful.

| | |
|---|--|
| SMB Protocol: | Click on this box to enable the fields in this section. |
| IPv4 Address: | Enter the IP address of the location where the incoming fax will be forwarded to. (i.e. 12.34.56.789) |
| Host Name: (An IP address or Host Name is required) | Enter the Host Name of the location where the incoming fax will be forwarded to. (i.e. \\server_one) |
| Share: (Required) | Enter the name of the shared folder in which the forwarded fax will reside. |
| Document Path: (Required) | Enter the name of the location within the share where the forwarded fax will be placed. If the share is the location you have chosen enter \ in the field. |
| Login Name: (Required) | Enter the login name that the device will need to access the file destination. |

| | |
|---|--|
| Password: Retype password: (Optional) | Enter the password that the device will need to access the file destination. Enter the password again as a verification step. <u>Select to save new password – option</u> If editing the rule you have the option of selecting the 'Select to save new password' box. Selecting this option will allow you to change the existing password to what was typed in these password fields. |
| File Name: (Required) | The default file name is Doc . However, you may configure a custom file name by selecting the Customize button. You may choose to include the date (YYYYMMDD) and/or time (HHMMSS) within the file name. There is also the ability to add custom text to the file name. To enable a field you must click on the associated box before entering the text. Note: The following characters are not allowed in the Custom Text fields for the Forward to File Destination: <i>/ ? < > ' " ; : = () * & % \$ <space></i> Clicking on the choices will make them appear within the Position field. Once you have added the Display options you may move the customized attributes, with the up and down arrows, to a position within the file name. The top attribute will be the attribute at the start of the file name. |
| Email Notification (without Attachment): (Optional) | Place a single email address in this field if you want an email notification sent to this address whenever a fax is stored in the configured location. The notification appears in the Inbox of the recipient with the Subject line "Fax Forward Notification". The body of the message will read, "A fax has been forwarded to the following location: <location>". Note: A Distribution List (DL) email address can be used if needed to send a notification to more than one person. |

Click the Apply button to save the Fax Forwarding rule.

Applying a Fax Forward Rule

Once the new Fax Forwarding rule is saved it needs to be applied in order to make it active.

To activate a rule select the radio button for the Fax Line you would like to apply the rule to. If you have one fax line you will only set one button for each rule. Once the rule is selected, click on the Apply button at the bottom of the screen. A confirmation message will appear when the action is successful.

| Fax Forward Rules | | Apply To Fax Line 1 | Apply To Fax Line 2 | |
|-------------------|---------------|----------------------------------|----------------------------------|-------------------------------------|
| No Fax Forwarding | | <input type="radio"/> | <input checked="" type="radio"/> | |
| Rule Name: | Invoices | <input checked="" type="radio"/> | <input type="radio"/> | <input type="button" value="Edit"/> |
| Print Local Copy: | On Error Only | | | |
| Forward To: | Email, SMB | | | |

Interaction with Accounting Services

If Xerox Standard Accounting or Job Based Accounting is enabled when a Fax Forward Job is sent through the system, the System Account will be incremented for each exported image and for each printed image associated with the job.

If a Fax Forwarding Rule is configured for Email and SMB Filing, then the Network Images Sent Usage counter will be incremented twice for every image in the job as it is being sent to two places. However, regardless of the number of email recipients, the counter is incremented only once for the email portion since only one set of images are exported to the SMTP server.

Email Splitting Configuration

- If the SMTP Server is configured for Email Splitting such that the Maximum Segment Size is set very small (e.g. 512KB), and a single image is too large to be exported, only the pages up to the image that is too large will be printed in error. It is recommended that the Email Splitting size not be set this low. If it must be, it is recommended that the File Format Type NOT be set to XPS.
- If both fax forward to email and to file are turned on, and if the resulting email is larger than the Maximum Segment Size, the email attachment will not go through, but the file will be stored to the SMB share without splitting. In these cases, customers may consider using the SMB option, with email notification without the attachment.

Fax Polling

- Fax polling is a separate feature that allows your machine to retrieve faxes stored on a remote machine. Customers who want to use the polling feature (and who also want to use Fax Forward) can use the “Print Always” option if they want the fax printed while they stand in front of the device, or they can temporarily turn off fax forward while they perform the poll.

Additional Information

You can reach Xerox Customer Support at <http://www.xerox.com> or by calling Xerox Support in your country.

Xerox Customer Support welcomes feedback on all documentation - send feedback via e-mail to: USA.DSSC.Doc.Feedback@xerox.com.

Other Tips about Xerox multifunction devices are available at the following URL: <http://www.office.xerox.com/support/dctips/dctips.html>.

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