GphoneFax Online
Administrator Guide

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GlobalPhone Technologies

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This is the second edition of this publication.

Version

This guide describes the Account Administration Center version 2.2, release date February 20, 2009, and revised October 1, 2009.

Contents

About GlobalPhone Fax Online

GphoneFax Online is a bundle of GlobalPhone fax services designed to meet the needs of enterprise and mid-sized businesses with individuals and groups who use fax as part of their business process.

GphoneFax Online services include two key components:

> **GlobalPhone Desktop Faxing - Email to Fax (E2F) and GlobalPhone Fax to Email (F2E)** – the business fax service that includes paperless processing of fax documents, automatic cover page generation, customized cover page design, and a variety of fax reception and delivery options. GlobalPhone E2F and F2E options can be set independently at the "Company", "Department", and "End User" levels of the organization.

> **Account Administration Center (AAC)** – the online application for creation and ongoing maintenance of fax user accounts. The AAC provides fax administrators with a full set of controls over the fax functions available to each user. The AAC is described more fully in the "Account Administration Center Administrator's Guide".

Availible Features:

- ✓ Outgoing faxing from email to fax device, using any email client on any email-capable device
- ✓ Incoming faxing from any fax machine, sent to a personal fax number assigned to the user, and forwarded as email to the users email address
- ✓ Unique sending email address for each personal fax number
- ✓ Multiple receiving email addresses for each personal fax number
- ✓ Automatic cover page generation for any outgoing fax document
- ✓ Unique fax cover pages for the company, department, or the individual user
- ✓ Web Services for integration of fax functions into software applications
- ✓ Fax delivery options for easy integration with document management applications
- ✓ User account creation and management tool
- ✓ User fax activity tracking reports available to the fax administrator and to individual users
- ✓ Downloadable Call Detail Reports, suitable for use in corporate accounting systems, containing records of individual fax user activity

With GlobalPhone Fax Online, business organizations are able to streamline their business processes by reducing or totally eliminating paper fax documents. Additional phone lines and fax equipment are also not needed. Overall efficiency is greatly increased.

Audience

This guide is both an instruction manual and a reference guide that is structured to meet the needs of anyone responsible for setup and maintenance of account information for users of GlobalPhone E2F and F2E, the desktop fax service component of the GlobalPhone Fax Online.

Supporting Documentation

Several other guides are available from GlobalPhone to supplement the information presented here. **GphoneFax Online User Guide** – Reference information for individual users of GlobalPhone Fax Online.

Account Administration Center Administrator Guide – Instruction manual for those responsible for setup and maintenance of group user account data using the Account Administration Center (AAC). The document details the functions available to fax administrators.

Account Administration Center User Guide – Instruction manual that describes functions available to individual users of the Account Administration Center (AAC).

Administering GphoneFax Online

Managing User Accounts

Fax Administrators use the Accounts Administration Center to maintain account data for all Fax Online users in the company. It is the Fax Administrator's role to create user accounts, delete them, and suspend them in accordance with the company policy. Administrators may also modify user profiles, get reports on user fax activity, and control access to email and server domains owned by the company.

When a new fax user account is created, a welcome email message is optionally generated and sent to the new user. The AAC allows user's limited access to their individual account settings. The welcome email message contains the information needed to login to the AAC for the first time. Users are encouraged to log in to their fax accounts, and to set a preferred password on the first login.

In addition the AAC allows the user to monitor their inbound and outbound fax activity by generating activity reports.

The Account Administration Center (in the "My Account" section at accounts.GlobalPhonefax.com) may be accessed and used from any Internet-accessible location.

Details of account set up and administration using the AAC can be found in the **Account Administration Center Administrator's Guide** and the **Account Administration Center User's Guide**. Both are available in the Support section at www.gphone.com.

Cover Page Control

Whenever a fax is sent using the email-to-fax (E2F) feature, you can choose to include an "Automatic" cover page, to have a cover page submitted "On Demand," or "No Cover Page."

Blank cover pages, also called cover page *templates*, are stored in a GlobalPhone database for each company that uses the GlobalPhone fax service. When personnel at the company send a fax, the default template may be retrieved from the database and filled in with fields from the email message.

Cover page templates can be designed by anyone in the company familiar with using Microsoft Word. Typically a cover page template will include a "header" section, which appears at the top of the page. The header section will contain all the relevant information about the fax itself, such as

To Fax Number:	the dialed fax number
From:	the name of the sender
Date:	date and time at which the fax was sent from the GlobalPhone network
Subject:	text taken from the subject line of the email message, with tokens removed
Number of Pages:	the number of pages faxed including the cover page

A footer section can also be created to provide more information about the sender at the end of the cover page. Examples of footer content include promotional messages and company contact information.

Creating an Attractive Fax Cover Page

The procedure for creating and submitting cover pages to the database:

1. Design a cover page layout using Microsoft Word. The header and footer should be created in separate Word documents. Do not create a single document including the header and footer.

2. Include any text, tables, and graphics you want in the cover page design as long as these are in Black and White. Color and Gray Scale do not translate to faxing without pixilation. Graphics may be embedded in the MS Word document or submitted in separate files (jpeg, max. 200x200 pixels). The design should also include character strings called *tokens*, which will be replaced with actual data when the cover page is processed. Tokens are enclosed in tilde characters (~).

3. Submit the Word document containing the cover page design to GlobalPhone Premium Support or to your GlobalPhone Account Executive. Premium Support will update the account settings for your company by entering the cover page into the database.

More than one cover page template can be stored for your company. Only the default template can be generated on demand. Contact GlobalPhone Premium Support to change the default cover page setting.

See the appendix for information on the tokens that are available for cover pages.

FAX	FAX TO:	~FaxNumber~
	FROM:	~SenderName~
	CONTACT NUMBER:	~SenderCSID~
	COMPANY:	~SenderCompany~
	SUBJECT:	~CoverSubject~
	DATE:	~Date~
	NUMBER OF PAGES:	~TotalPages~

Figure 2. A sample cover page header with tokens. It could be created as a table in Microsoft Word.

The color image above would need to be converted to all black and dithered (often resulting in looking fuzzy) to approximate the color variations and differences.

The greyscale image above (often referred to as B&W) would need to be converted to **All Black** and dithered (often resulting in looking fuzzy) to approximate the variations in grey.

The above image is **All Black** and would not need to be converted or dithered and should result in a sharp and clear image. This is **All Black** and would not need to be converted or dithered and should result in a sharp and clear image.

Customizing Cover Pages and Notification Messages

GphoneFax Online allows business to offer fax services to its personnel, or to its customers, with its own corporate branding. Custom branding may occur at several customer touch points.

Cover pages – the cover page design can include corporate branding in the header and footer. Cover page creation is discussed above.

Notification Messages – these are email messages that result when an outbound fax is sent and when an inbound fax is delivered. A typical notification message is the "successful delivery" message.

Notification messages are created as files in either text or HTML format. Several files are needed for a complete branding exercise, as depicted in the following table.

Notification Message Type	Description	Instructions
Initial Notification Message	Message retuned to a sender using email-to-fax. It acknowledges that the fax request has been received.	Create two files. 1. The Subject line of the initial notification email 2. The contents of the initial notification email
E2F Delivery Notification Message	Message returned to a sender using email-to-fax. It describes the successful delivery status of the fax.	Create two files. 1. The Subject line of the delivery notification email 2. The contents of the delivery notification email. Note that this message type is only for successful fax delivery.
Failure Notification Message	Message returned to a sender using email-to-fax. It describes any failure that occurs during fax processing and transmission.	Create two files. 1. The Subject line of the failure notification email 2. The contents of the failure notification email. Note that this message type is only for unsuccessful fax delivery. A variety of error codes can be included with this type of message. Please contact GlobalPhone Support for a list of these codes.
F2E Delivery Notification Message	Message delivered to a predetermined user email address when a fax is received (fax-to-email). Note that the email containing the fax attachment is delivered to one address, while this notification message is delivered to a separate address.	Create two files. 1. The Subject line of the delivery notification email 2. The contents of the delivery notification email. Note that this message type is only for successful fax delivery.

See the appendix for information on the kinds of data that can be included in customized notification messages.

The following examples illustrate the two message files that should be created in order to revise the notification messages.

Example Initial Notification Message

Email Subject: Your Fax Request Has Been Received

Email Content: Your fax to 800-777-8888 has been received, and it will be sent shortly. Message ID: 111-2233

Notification File: Your fax to %{FaxNumber} has been received, and it will be sent shortly. %{CRLF}Message ID: %{MessageID}

Example Delivery Notification Message

Subject: Your Fax to 800-777-888 has been delivered

Content: Your fax to 800-777-8888 was delivered at May 12, 2007 12:01:08 PT Thank you for using GlobalPhone fax service. It has been a pleasure to serve you.

Notification File:
Your fax to %{FaxNumber} was delivered at %{TimeSent}.%{CRLF} Thank you for using GlobalPhone fax service. It has been a pleasure to serve you.

Submitting the Files

The files that control the behavior of cover pages and notification messages are stored in GlobalPhone's database for your company's fax account. Cover pages and notification messages are configured when a new business account is first created, and thereafter, whenever a request is made by the authorized fax administrator for the business fax account.

Whenever a change is desired, please contact GlobalPhone Support. Be prepared with the files as described in this document. GlobalPhone representatives will instruct you on preferred methods of file transfer, and assist with any questions or support issues related to the files and the desired changes to the fax service.

Upon receipt of the files, Premium Support will proceed with the necessary updates to the GlobalPhone databases.

GlobalPhone Premium Support can be reached at 1-703-533-2122, or support@gphone.com.

Call Detail Records

GphoneFax Online allows our customers to monitor and retrieve all of their inbound and outbound fax activity by a large number of fields from any or all of the prior 6 months, up to the last full day of faxing activity.

Many of the fields that can be retrieved by Call Detail Records are shown in the table below.

CompanyID	CountryCode	FaxPhoneNumber	TollFreeFlag
User ID	LastName	FirstName	EmailAddress
PageCount	Date	Time	TimeZone
FaxDestNumber	EventType Desciption	Subject	UserFields

Download Call Detail Records

When you login into the AAC there is a primary field called "Call Detail Records." This field offers downloadable access to the last 6 months of "Available CDR files." (See below)

Available CDR files
Current Month
October
September
August
July
June
May

In order for the "Current Month" to be created you must click on the "Generate Current Month" button. (see below)

Generate Current Month

Except for "Current Month," the records of each month of activity stored in Call Detail Records is found in a single file. The "Current Month" record is stored as a series of files, created every day there is activity. So, depending on which day you look there may be as many as 31 files.

Instructions are also found within the AAC (Call Detail Records/Download CDR).

Appendix A – Supported File Formats

The following file types can be attached to an email message and converted to a fax by the GlobalPhone network. Other file types have not been tested for compatibility. Results may vary if other file types are used.

- Microsoft Word (*.doc, *.docx)
- Microsoft Excel (*.xls, *.xlsx)
- Microsoft Power Point (*.ppt, *.pptx)
- Microsoft Visio (*.vsd)
- HyperText Markup Language (*.html, *.mhtml)
- Adobe Acrobat (*.pdf)
- JPEG image (*.jpg)
- TIFF image (*.tif)
- ASCII Text (*.txt)
- Rich Text (*.rtf)

NOTE: Be mindful of the file sizes of the documents you are faxing, particularly if you are sending scanned images, as they can be quite large. While most source documents faxed are usually quite small (less than 200 KB), GlobalPhone will limit the maximum size of attached file(s) with either a single file or multiple files. The current limit is: 10,240KB (10MB).

Files exceeding these limits are most always high-resolution, multi-color, scanned images. In addition to exceeding size limits, such images are not typically "fax friendly". Documents should contain no color, shading, or gray-scale, and never printed as "photo-quality". Color, or shaded documents do not translate well to fax and will contribute to exceedingly large file sizes and longer transmission times. Documents with graphic art content should be limited to solid black, with no shading, or gray-scale.

Appendix B – Cover Page Tokens

Cover pages can be created as Microsoft Word files. The following table describes the data that is available for inclusion in cover pages.

The data is represented by variables in the cover page design called *tokens*, which are shown here. Tokens are replaced by the actual value of the corresponding data when the cover page is generated by the GlobalPhone network.

Tokens should be positioned in the tables or fields of the cover page design as desired (see figure 2 for an example). Note that the syntax includes the tilde symbol (~) at the ends of the string.

Token	Description	Example
Date	Current Date	~Date~
Time	Current Time	~Time~
DateTime	Date and Time	~DateTime~
Subject	Subject field from email header	~CoverSubject~
RecptName	Recipient Name from email header	~RecptName
FaxNumber	Recipient Number	~FaxNumber~
RecptCompany	Recipient Company Name	~RecptCompany~
MessageType	Indicator of the type of message receive/forwarded (voice, fax)	~MessageType~
ReceivedTime	Time at which message was received	~ReceivedTime~
Resolution	The resolution of the received fax	~Resolution~
SenderCSID	CSID of the caller sending the fax	~SenderCSID~
Total Pages	Total number of pages sent in fax, including the cover page	~TotalPages~
SenderName	Sender Name	~SenderName~
SenderCompany	Sender Company	~SenderCompany~
SenderAddress1	Sender Address 1	~SenderAddress1~
SenderAddress2	Sender Address 2	~SenderAddress2~
SenderCity	Sender City	~SenderCity~
SenderState	Sender State	~SenderState~
SenderCountry	Sender Country	~SenderCountry~
SenderZip	Sender Zip	~SenderZip~
SenderTelephone	Sender Telephone	~SenderTelephone~
SenderFax	Sender Fax	~SenderFax~

Appendix C – Email-To-Fax Notification Message Data

Notification messages are returned to the sender when using email-to-fax. The types of notification messages include the initial notification message, the delivery notification message, and the failure notification message.

Notification messages may be created in text file format. The following table depicts the data that is available for inclusion in notification messages.

The data is represented in the notification message file by the tokens shown here. Tokens are replaced by the actual value of the corresponding data when the notification message is generated by the GlobalPhone network.

Tokens should be positioned in the text of the notification message file as desired. Note that the syntax includes the delimiters %{} at the ends of the string.

Token	Description	Example
CallDuration	Duration of the call in which fax was delivered *This token used on delivery confirmation messages only.*	%{CallDuration}
CRLF	New line	%{CRLF}
MessageID	Unique message identifier assigned to email submission	%{MessageID}
NumPages	Number of pages in the fax. *This token used on delivery confirmation messages only*	%{NumPages}
PreProcError	Error details for a job that failed before submission to the fax delivery platform. *This token used on initial notification messages only*	%{PreProcError}
ReferenceID	User specified identifier assigned to submission	%{ReferenceID}
Status	Final Status of the entire submission *This token used on delivery confirmation messages only.*	%{Status}
Tab	Tab Character	%{Tab}
TimeSent	Date and time when the fax was sent to the recipient. *This token used on delivery confirmation messages only.*	%{TimeSent}
FaxNumber	Fax number to fax to (Destination Fax Number)	%{FaxNumber}
ErrorCode	Internal Error Code	%{ErrorCode}
ErrorClass	Internal Error Code	%{ErrorClass}
ErrorExtra	Additional Error Information	%{ErrorExtra}
ErrorString	Detailed Error string	%{ErrorString}
Subject	Subject of the original email request	%{Subject}
OriginalSender	Sender Email Address	%{OrginalSender}
OriginalTime	Time request was received by the SMTP Gateway	%{OrginalTime}

Appendix D – Fax-to-Email Notification Message Data

Notification messages are optionally delivered to the email recipient when using fax-to-email (F2E). F2E notification occurs upon successful delivery of the fax, and the notification message is delivered to an email address different from the address where the fax is delivered.

 Notification messages may be created in text file format. The following table depicts the data that is available for inclusion in notification messages.

The data is represented in the notification message file by the tokens shown here. Tokens are replaced by the actual value of the corresponding data when the notification message is generated by the GlobalPhone network.

Tokens should be positioned in the text of the notification message file as desired. Note that the syntax includes the delimiters %{} at the ends of the string.

Token	Description	Example
Account	The identifier of the account receiving the fax This value is generally used for internal purposes only, it may have limited benefit for the partner's customers	%{Account}
CalledNumber	The number dialed by the fax sender	%{Called Number}
CallerName	The name (if available) of the person sending the fax	%{CallerName}
CallerNumber	The number from which the fax was sent	%{CallerNumber}
CRLF	New line	%{CRLF}
Date	Date on which message was received	%{Date}
Duration	Time taken to transmit the fax from caller with IVR.	%{Duration}
Email	Message recipient's email address	%{Email}
MessageId	Identifier assigned to the message upon receipt by the IVR	%{MessageId}
MessageType	Indicator of the type of message received/forwarded (voice, fax)	%{MessageType}
ReceivedTime	Time at which message was received	%{ReceivedTime}
Resolution	The resolution of the received fax	%{Resolution}
SenderCSID	CSID of the caller sending the fax	%{SenderCSID}
Speed	The transmission speed of the call on which the fax was sent	%{Speed}
Tab	Tab character	%{Tab}
TimeZone	The time zone in which the recipient receives and views messages	%{TimeZone}

Appendix E – Common Error Descriptions

Error Message	Enhanced Error Description
Busy	"Busy" Indicates that the called number (phone line) is already in use or engaged.
No Answer	"No Answer" indicates that the line was not picked up (answered) by a fax machine or person before timing out. The timeout is sufficient to ensure at a minimum of 5-8 standard rings.
Not a Fax Machine	"Not a fax machine" indicates that a fax device has failed to answer the call. Specifically, fax tones or the fax signal from a remote machine has not been detected. This may for a number of reason including but not limited to, a wrong number, a machine not configured to automatically answer, or a device that has stopped answering because it is out of paper or has a paper jam.
Voice Answer	"Voice Answer" indicates that either a person or voicemail message answered the call.
Fast Busy	"Fast Busy" indicates that there was no available path to the attempted fax number. This normally indicates that the destination is currently overloaded, or that there is an outage with the specific number or in the area attempted such as that due to a fibre cut. This can also be caused by severe weather conditions in the area of the destination. In most cases Fast Busy conditions are temporary, please verify the fax number you're trying to reach is valid and if so please try again later.
Sit-Tone / Operator Msg	"Sit-Tone / Operator Msg" indicates that the call was intercepted by the special situation information tones followed by an operator message, examples include "The number you have dialed is disconnected or is no longer in service. Please check the listing and try your call again.", "The number you have dialed has been changed...the new number is...XXX-XXX-XXXX", "All circuits are currently busy, please try your call again later". "Operator Msg" indicates the same issue however the special situation information tones were not detected.

Appendix F – Frequently Asked Questions

Below you will see a series of "How do I…?" scenarios that can make use of your Company's AAC.

1) How do I change the CSID for a User?

- Login to your company AAC and go to the User Administration / Manage User field.

- At the bottom of the Manage User Account page click on "Search."

- This will take you to the list of Users.

- Select a user and click on "account settings" at the bottom of the page.
- On the User Account Settings page that comes up you will see the following in "Sending Options."

- As you can see, this user's Fax CSID is <faxnumber>, the default. This may be edited.
- You may put anything you wish in this CSID field. (20 characters maximum)

Save your changes by clicking on **update** at the bottom of the page.

2) How do I select a cover page by location?

    a. Generally, this is done by creating Departments (see item 4 on page 21) and creating a specific Cover Page for each Department.

    b. You may also create specific cover pages for specific users.

    c. You can have multiple Cover Pages in your account, however, the correct cover page must be associated with the appropriate user or Department.

    d. At the Company Level in the AAC there is a Field that allows you to assign Cover Pages.

    e. You can do this by going to the Company Settings under Account Settings.

    f. At the top of this field you can choose whether the Cover Pages will be Automatic, On Demand, or, No Cover Pages at all. In the image below On Demand Cover Pages is chosen.

    g. Towards the bottom of the Company Account Settings screen is the Cover Page Selection field.
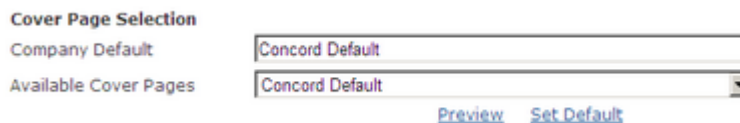
    h. In this field you can select the Cover Page for the whole company.

    i. There is another option to select Cover Pages at the department and user level.

    j. If you go to "Manage Users" under "User Administration" you will see the following.

    k. When you click on the "Search" button at the bottom of the screen you see the following User List. (image below only a partial list)

	Country	Department	Last Name	First Name	Fax Number	Email	Status
☐	USA	Test19alx	Test	19	<faxnumber>	Test19alx@hotmail.com	Active
☐	USA	Test19alx2	Test	192	<faxnumber>	Test19al2@concordfax.com	Active
☐	USA	Test19alx3	Test	193	<faxnumber>	Test19a3@concordfax.com	Active

l.   When you check a specific user and click on the Account Details at the bottom of the page you will see the following at the top of the page.

Feature Options

Automatic Cover Pages	○
On Demand Cover Pages	◉
No Cover Pages	○

m.   Towards the bottom of the User Account Settings screen is the Cover Page Selection field.

Cover Page Selection

Company Default	Concord Default
Available Cover Pages	Concord Default ▾

Preview   Set Default

n.   This is the location where you could determine which Cover Page a specific User should have.

3) How to I change the address on the cover page? The cover page we currently have is for only one department? I will need one for another department, as well.

a) On Page 8 and 9 of this GphoneFax Online Administrator Guide you will find the following instructions.

Cover Page Creation

The procedure for creating and submitting cover pages to the database is:

1. Design a cover page layout using Microsoft Word. The header and footer should be created in separate Word documents. Do not create a single document including the header and footer.

2. Include any text, tables, and graphics you want in the cover page design. Graphics may be embedded in the Word document or submitted in separate files (jpeg, max 200x200 pixels). The design should also include character strings called tokens, which will be replaced with actual data when the cover page is processed. Tokens are enclosed in tilde characters **(~)**. (In Figure '2.' below you will see the tokens in **bold** on the far right)

3. Submit the Word document containing the cover page design to GlobalPhone Premium Support or to your GlobalPhone Account Executive. Premium Support will update the account settings for your company by entering the cover page into the database.

More than one cover page template can be stored for your company. You may also submit cover pages to be used for each department or user in the company. At each level, a single cover page is defined as the default page for use. The defaults are set by the administrator in the AAC.

See the Appendix for information on the tokens that are available for cover pages.

	To:	**~RecptName~**
FAX	Fax No:	**~FaxNumber~**
	From:	**~SenderName~**
	Date:	**~Date~**
	Subject:	**~CoverSubject~**
	Number of Pages:	**~TotalPages~**

Figure 2. A sample cover page header with tokens. It could be created as a table in Microsoft Word.
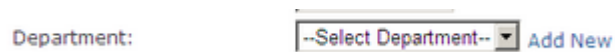
b) Please note that "**More than one Cover Page template can be stored for your company**."

4) How do I create departments?

- To create a Department there is a simple step-by-step process.

    i. In the AAC click on Create users

    ii. Toward the bottom you will see a Department field

    iii. Click **Add New** and a field will open allowing you to Add a Department.

5) How do I change a user's sending or receiving email address

User accounts are unable to edit their sending and receiving email addresses. These can only be edited at the company administrator level, on the AAC.

You may have only one sending email address, while having up to five (5) forwarding, or receiving email addresses. *Remember, you will need to always have one (1) sending and at least one (1) receiving email address.*

Here are the steps to make this change using the Company AAC…

- Log into the AAC and go to User Administration and Manage Users (see image below)

- At the bottom of Manage Users click on the SEARCH button
- This will take you to the Manage user Account screen (see image)

- Put a check mark in the box of the user you wish to edit and click on "user details."
- This brings you to the Manage User screen for this user. (see image)

- On this page you will see the inbound email addresses field. (see image)

- Once you make the change you can click on "update" at the bottom of this page and the account will be updated with the new information.
- The same process may be used for configuring the sending email address.