



Wave  
Fax Manager 2.0  
Release Notes &  
Administrator Guide

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## Revision History

Release	Date	Documentation Changes	Page No.
<b>2.0</b>	<b>09/2014</b>	<b>DOCUMENTATION UPDATE:</b>	
		Section “Hardware resources supported by Fax Manager” now lists the number of fax ports you can allocate for Fax Manager based on the hardware installed in the Wave Server.	<a href="#">1-1</a>
		Updated section “Wave ISM requirements”—Fax Manager 2.0 is supported on all Wave ISM versions.	<a href="#">2-1</a>
<b>2.0</b>	<b>10/2012</b>	<b>GENERAL RELEASE:</b>	
		Added steps to download and install Wave 3.0 Feature Pack 1, required for Fax Manager 2.0.	<a href="#">2-1</a>
<b>2.0</b>	<b>05/2012</b>	<b>GENERAL RELEASE:</b>	
		Faxes can now be forwarded as PDF files attached to e-mails.	---
<b>1.0</b>		<b>GENERAL RELEASE:</b>	
		Initial release.	---



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# Introduction

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## What's new in this version

**Inbound fax routing via e-mail has been enhanced in Fax Manager 2.0**—inbound faxes forwarded as e-mail attachments can be in TIFF or PDF format. Previously, only TIFF attachments were supported. The default format is PDF.

## Inbound fax routing via e-mail

Wave Fax Manager enables the reception of inbound faxes into the Wave system and then forwards them to the e-mail accounts of Wave users who have been configured as fax recipients. Each inbound fax is attached to an e-mail sent to the appropriate user.

Fax Manager provides inbound routing only. Fax Manager is supported on all Wave ISM versions.

For more information about configuring Fax Manager, see Chapter 4.

## Hardware resources supported by Fax Manager

Fax Manager supports designating the RSC4 and/or MRM ports for fax use.

**Note:** Allocation of port resources for faxes is done using the Resource Management applet. Depending on your system resources and licenses, you can allocate up to 24 fax ports for the Fax Manager application:

- Base DSP = 1 Fax Port
- MRM-A = 2-8 Fax Ports
- MRM-B/C = 8-24 Fax Ports

For more information about configuring ports for Fax Manager, see Chapter 3.





# Installing Fax Manager

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This chapter describes the system requirements to use Fax Manager, and includes step-by-step instructions for installing the Fax Manager application.

## System requirements

### Hardware requirements

You can install Fax Manager on a Wave IP 2500 Server or Wave IP 500 Server. A Media Resource Module (MRM) is optional.

### Wave ISM requirements

Fax Manager is supported on all Wave ISM versions.

## Installing the Fax Manager application

The following procedure guides you through installing Fax Manager using the Software Upgrade applet via the Wave Global Administrator Management Console.

This process deploys the Fax Manager application files and reboots your system **twice**.

1. Download the file **FM\_2\_0\_0\_500\_3065.CAB** from the Vertical Communications Web site. Place the file on the hard drive of a client PC that has network access to the Wave Server where Fax Manager will be installed or updated.
2. From the client PC, log on to the Global Administrator Management Console using the following logon credentials:

**Username:** GlobalAdministrator

**Password:** <password>

3. Click the Software Upgrade icon to launch the Software Upgrade applet. Note that the Upgrade button is automatically activated.
4. Click **Browse** and navigate to the directory where you saved the CAB file.
5. Select the file **FM\_2\_0\_0\_500\_3065.CAB** and click Open.  
FM\_2\_0\_0\_500\_3065.CAB appears in the Filename field.
6. Do one of the following:
  - **To add a single HotFix**, click **Add and Start Upgrade** to initiate the upgrade.  
The HotFix will be uploaded to the system, and the upgrade process will begin.
  - **To add multiple HotFixes at the same time**, click **Add**. Repeat steps 5 and 6 to load each HotFix.
    - The HotFixes will be installed in the order they appear. To change that order, select the HotFix to be re-ordered and then click **UP** or **DOWN**.
    - Vertical recommends that HotFixes be loaded in numerical order and that system HotFixes are loaded before add-on application HotFixes.
    - When you are satisfied with the list of HotFixes, click the **Start** button below the Upgrade List box to initiate the upgrade.
7. If your system is properly configured to send SNMP alarms, you will be alerted on the progress of the upgrade via the SNMP Alarms applet. Minimize the SNMP Alarms applet.

8. When you see the following message, click **Done** to close the Software Upgrade applet and return to the Global Administrator Management Console:

Upgrade Status

System upgrade started.

9. Restore the SNMP Alarms window and monitor it until you see the “Rebooting started” entry. Then, close the SNMP Alarms window and close the Global Administrator Management Console. The system will be fully operational following **two reboots**.

**Note:** If you are applying multiple HotFixes in a single upgrade, the total number of reboots is equivalent to the maximum reboots required for any one of the HotFixes.

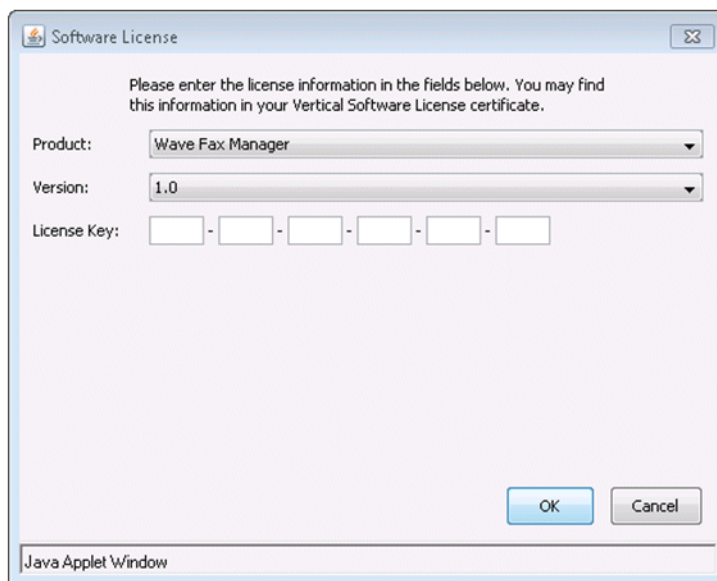
10. When the upgrade completes and the system is again accessible, check the Software Versions applet to ensure that the application of the HotFix(es) is reflected there. The top entry will show the latest major or service pack release. The entry(ies) that reflect the HotFix(es) will list below in the order applied as follows:

[Day] [Date] [Year] [Time]= **2.0.0.500.3065 Fax Manager 2.0 (3065)**

## Entering your Fax Manager license

You must have a license key provided by your Vertical reseller to unlock, configure, and use the Fax Manager application. You enter the necessary license key information on the Wave Server using the Software Licenses applet via the Global Administrator Management Console.

1. On the Administration tab of the Global Administrator Management Console, select Software Licenses. The Software Licenses applet starts and displays any licenses that have already been entered.
2. Click **Add**. The Software License dialog opens:

A screenshot of a Java Applet window titled "Software License". The window has a light blue border and a close button in the top right corner. Inside, there is a text instruction: "Please enter the license information in the fields below. You may find this information in your Vertical Software License certificate." Below this, there are three fields: "Product:" with a dropdown menu showing "Wave Fax Manager", "Version:" with a dropdown menu showing "1.0", and "License Key:" with six empty input boxes separated by hyphens. At the bottom right, there are "OK" and "Cancel" buttons. The status bar at the bottom of the window says "Java Applet Window".

3. Enter the following information:
  - **Product:** Select Wave Fax Manager from the drop-down list.
  - **Version:** Select the version number for that product.
  - **License Key:** Enter the full 24-character license key.
4. Click **OK**. The license you added is now displayed.
5. To add additional licenses, repeat steps 2-4. When you are done, activate the new licenses.

6. Click **Done** to close the Software Licenses applet.
7. Verify that the Fax Manager icon is no longer disabled in the Global Administrator Management Console.

You are now ready to configure the Fax Manager software, as described in the next chapter.



# Chapter 3

## Configuring Ports for Fax Manager

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Allocating fax port resources . . . . .	3-1
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Assigning the Fax Manager hunt group to a trunk group . . . . .	3-5

This chapter describes how to configure ports for Fax Manager's use.

### Allocating fax port resources

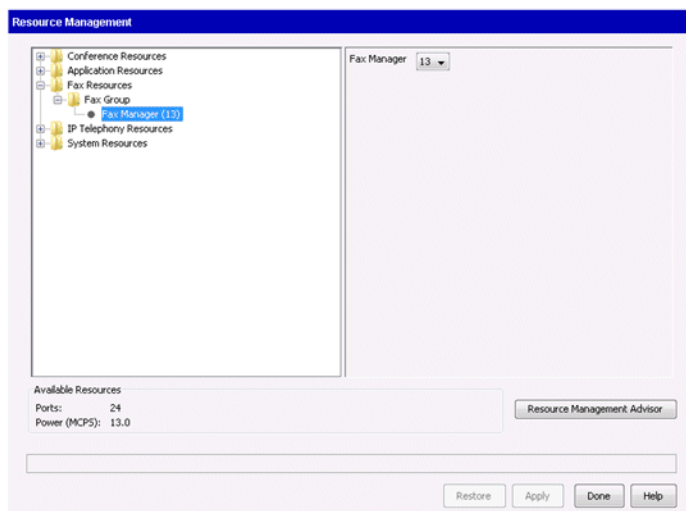
You allocate port resources for faxes using the Resource Management applet. Depending on your system resources and licenses, you can allocate up to 24 fax ports for the Fax Manager application:

- Base DSP = 1 Fax Port
- MRM-A = 2-8 Fax Ports
- MRM-B/C = 8-24 Fax Ports

#### *To allocate resources for fax ports*

1. Log on to the Global Administrator Management Console, and then select the Administration tab.
2. Click the Resource Management icon, located in the PBX Administration section.
3. Expand the Fax Resources and Fax Group folders.
4. Click **Fax Manager**.

5. Select the number of fax ports to allocate to the Fax Manager application from the **Fax Manager** drop-down list.



6. Click **Apply** to save your changes.
7. Click **Done** to return to the Global Administrator Management Console.



## Creating the Fax Manager hunt group

You use the Hunt Groups applet to create an application hunt group for Fax Manager, specify a pilot number for the hunt group, and assign fax ports. You can configure multiple hunt groups for Fax Manager.

### To create a hunt group

1. Log on to the Global Management Console, and then select the Administration tab.
2. Open the Hunt Groups applet, located in the PBX Administration section.
3. Select the Application tab.
4. Click **New**. The Application Hunt Group dialog opens:

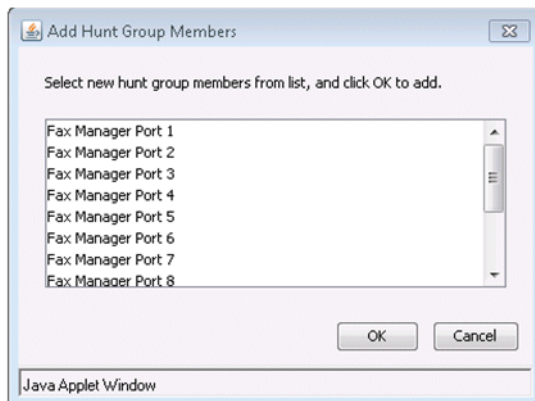
The screenshot shows the 'Application Hunt Group' dialog box. It contains the following fields and controls:

- Pilot:** A text input field.
- Name:** A text input field.
- Application Type:** A dropdown menu with 'Fax Manager' selected.
- Hunt Order:** A dropdown menu with 'Circular' selected.
- Members:** A list box with a 'Name' header. To the right are 'Up' and 'Down' buttons. Below the list are 'Add...' and 'Remove' buttons.
- Forwarding:** Two rows of controls:
  - Row 1: 'When busy, forward to extension' dropdown with 'None' selected.
  - Row 2: 'When no answer after' dropdown with '3' selected, followed by 'rings on' text, then a dropdown with a down arrow, followed by 'members, forward to extension' dropdown with 'None' selected.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

5. Enter the following:
  - **Pilot:** Pilot extension for the hunt group. Note that this is NOT the telephone number for inbound faxes.
  - **Name:** Hunt group name.
  - **Application Type:** Select Fax Manager from the drop-down list.
  - **Hunt Order:** Select Circular from the drop-down list.

6. Click **Add**.

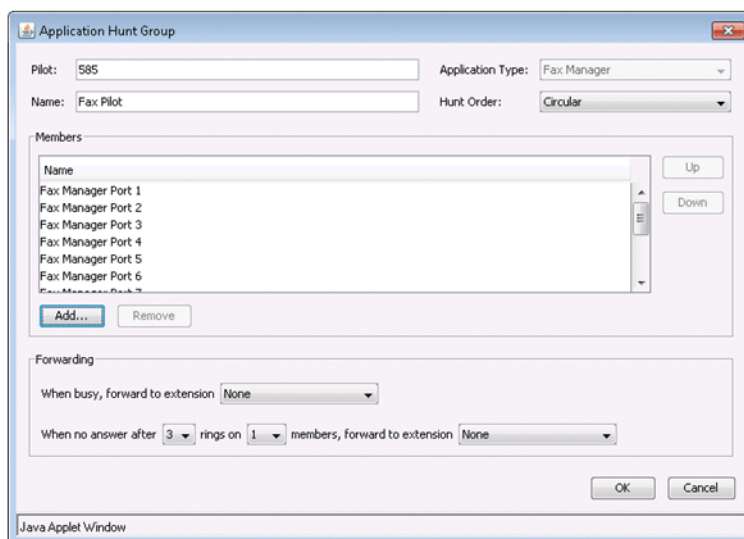
The Add Hunt Group Members dialog opens:



7. Select the fax ports to add to this hunt group, and then click **OK**.

**Note:** Do not select the Modem port.

8. In the Application Hunt Group dialog, you can reorder a fax port in the Members list by selecting a port and then clicking the **Up** or **Down** button to reposition it.



9. Click **OK**.
10. Click **Apply** to save your changes, and then click **Done** to return to the Global Administrator Management Console.

## Assigning the Fax Manager hunt group to a trunk group

After creating the Fax Manager Hunt Group, you must configure the Trunk Group to correctly route the inbound fax call to the Fax Manager Hunt Group extension.

### *To configure the trunk group for a Fax Manager extension*

1. Log on to the Global Administrator Management Console, and then select the Administration tab.
2. Click the Trunk Group icon, located in the Trunk Administration section.
3. Select the trunk group that needs to be configured for receiving faxes, and then click **Edit**.
4. The Trunk Group dialog opens, displaying the In tab:

The screenshot shows the 'Trunk Group' configuration window with the 'In' tab selected. The 'Name' field is 'Voice Digital'. The 'Direction' is set to 'Both'. The 'Enable Outside Line functionality' checkbox is unchecked. Under 'Digit Interpretation', 'Inbound Routing Table' is selected, with an 'Edit Inbound Routing Table...' button. 'First Digit Table' and 'Use Outside Line Inbound routing' are unselected. The 'Provide Dial Tone to Far End' checkbox is also unchecked. The 'Intercept Destination' dropdown is set to '551 - FaxManager HG551'. The 'Access Profile for Tandem Calls' dropdown is set to 'None'. 'OK' and 'Cancel' buttons are at the bottom right. A 'Java Applet Window' status bar is at the bottom left.

5. For **Intercept Destination**, select the Fax Manager Hunt Group extension from the drop-down list.
6. Click **OK** to save your changes.

## Configuring Inbound Fax Routing

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Specifying e-mail addresses for inbound faxes .....	4-3
Setting up fax e-mail archives .....	4-4

This chapter describes configurable settings for inbound fax routing.

### Setting or changing the SMTP server

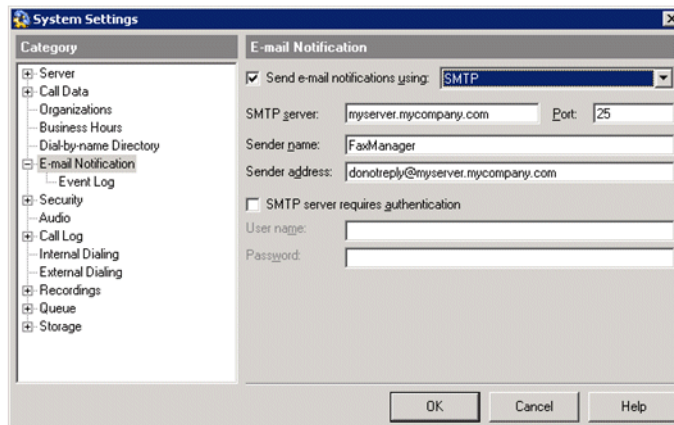
To send faxes via e-mail, you must first configure the SMTP server settings.

#### *To set or change the SMTP server*

1. Log on to the Global Administrator Management Console, and then select the Administration tab.
2. Click the User/Group Management icon.
3. Select **Tools > System Settings**.
4. Select the E-mail Notification category.
5. Select the **Send e-mail notifications using** checkbox, and then select **SMTP**.

**Note:** MAPI is not supported with Fax Manager.

6. Complete the SMTP settings fields with information provided by your e-mail administrator or Internet Service Provider.



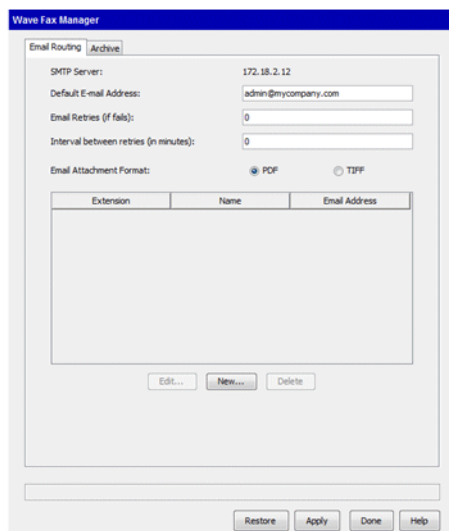
7. Click **OK**.
8. Exit the User/Group Management applet.

## Specifying e-mail addresses for inbound faxes

You use the Fax Manager applet to specify the e-mail addresses to which the Fax Manager software forwards inbound faxes.

### *To specify e-mail address for inbound faxes*

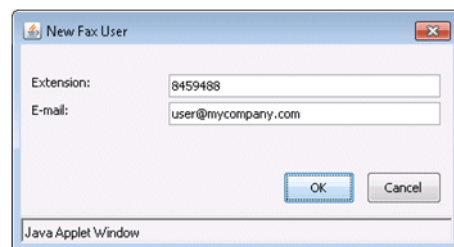
1. Log on to the Global Management Console, and select the Applications tab.
2. Launch the Fax Manager applet.



The Wave Fax Manager applet window shows the 'Email Routing' tab. It contains the following fields and controls:

- SMTP Server: 172.18.2.12
- Default E-mail Address: admin@mycompany.com
- Email Retries (if fails): 0
- Interval between retries (in minutes): 0
- Email Attachment Format: ☒ PDF, ☐ TIF
- A table with columns: Extension, Name, Email Address.
- Buttons: Edit..., New..., Delete.
- Bottom buttons: Restore, Apply, Done, Help.

3. Click **New** to open the New Fax User dialog:



The New Fax User dialog box contains the following fields and controls:

- Extension: 8459488
- E-mail: user@mycompany.com
- Buttons: OK, Cancel.
- Footer: Java Applet Window

4. Enter the following information:
  - **Extension:** Enter the Called Number.
  - **E-mail:** Enter the e-mail addresses to which you want the faxes forwarded. For group distribution, create the group in your E-mail Server and use the group distribution e-mail address in this dialog. You should always provide a Default E-mail address.
5. Click **OK**
6. Click **Apply** to save your changes, and then click **Done** to return to the Global Management Console.

## Setting up fax e-mail archives

Fax Manager can be configured to archive all fax e-mails for a specified number of days, after which faxes are purged automatically.

Faxes are archived to the following location:

C:\Program Files\CMS\FaxManager\Routing\Archive

By default, Fax Manager is set to archive fax e-mails for 7 days.

### ***To change the number of days or turn off fax archiving***

1. Log on to the Global Management Console, and select the Applications tab.
2. Launch the Fax Manager applet.
3. Select the Archive tab.
4. To turn on fax archiving or change the number of days fax e-mails are archived:
  - Select **Archive fax e-mails for**.
  - Enter the number of days Fax Manager should keep fax e-mails in the archive before purging them.
5. To turn off fax archiving, select **Do not archive fax e-mails**.
6. Click **Apply** to save your changes, and then click **Done** to return to the Global Management Console.



# Running Fax Reports

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With Fax Manager, you can report on inbound fax activity during specific day and time periods.

## Fax report types

Three types of reports are available:

- Summary reports
- Detailed reports
- Error reports

## Summary reports

Summary inbound fax reports provide high-level statistics on fax activity during a specific period. Summary reports include the following:

- Date and time period covered by the report
- Total faxes received
- Total faxes failed
- Total pages received

## Detailed reports

Detailed inbound fax reports provide more information about each inbound fax. Detailed reports include the following:

- Date and time period covered by the report
- Time each fax was received
- Duration in seconds of each fax transmission
- Recipient's e-mail address and extension
- Total pages per fax
- Attachment size per fax (in KB)
- Caller ID of the sender (if available)

## Error reports

Error Reports provide statistics on all unsuccessfully transmitted faxes. An unsuccessful fax is logged when the fax server detected a ring event but did not receive a document.

Error Inbound Reports include the following:

- Date and time period covered by the report
- Date, time, and Caller ID of the sender
- Recipient's extension for any faxes that failed

If no faxes failed during the selected date and time period, the error report is blank.

## Running a report

### *To run a fax report*

1. Log on to the Global Management Console, and select the Applications tab.
2. Click the Reports icon. The applet launches in a new window, displaying the Inbound Fax Reports tab.
3. Select the type of report to run: **Summary**, **Detailed**, or **Error**.

**Note:** Do not click the **Generate Reports Now** button—you must first set up other reporting options.

4. Specify a date or date range for the report:
  - **Today**
  - **This Week**
  - **This Month**
  - **Custom Date:** If you select this option, you must specify start and end dates for the date range that you want. to report on.

You can either select the desired month, day, and year from the drop-down menus, or select dates from a calendar.

To select a date from the calendar, click the calendar icon to the right of the start or end date drop-down list.

- To select a date in the current month, click the date.
- To select a date in another month, click either the left arrow (previous month) or the right arrow (next month) until the month appears, then click the desired date.

When you click a date, the calendar closes automatically, and the corresponding drop-down lists are updated to reflect the selected date.

To close the calendar without selecting a date, click the calendar icon again.

5. Specify a time range for the report. The default setting covers the entire day, from midnight to midnight. The time range you select applies to all dates in the date range that you specified.

Optionally, you can filter the contents of the report by any field that appears in the report, such as an extension. To filter the report, type the keyword in the Search String field, located in the Filter By section.

6. Click **Generate Reports Now** to run the report.



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