

# Cloud Fax Site

## Administrator Guide





## Cloud Fax Site Administrator Registration

Upon request, Nex-Tech will create a site administrator that will allow specific individuals to log in and manage basic fax server settings, just as if you had your own on-site fax server.



## Administrator Accounts

Multiple accounts with site administrator privileges can be created, allowing organizations to share administrator responsibilities. Unlike users, administrators do not have faxing privileges. Their sole responsibility is site administration.

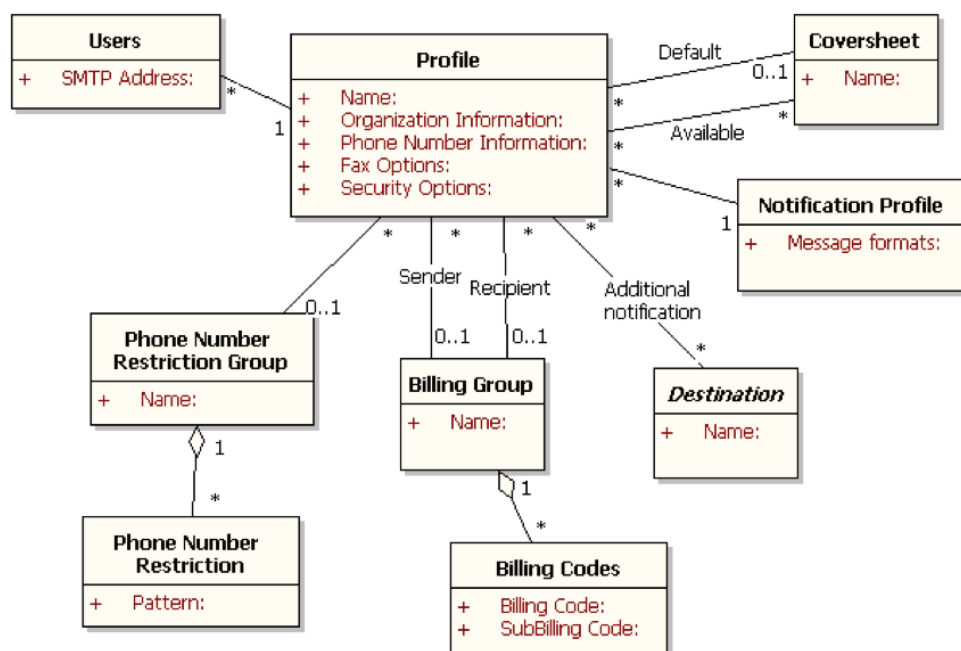
Access rights are assigned to site administrators to limit their roles. For example, an administrator who has access rights enabled for profiles, can add, remove and edit profiles. Note that an administrator that has access rights to administrator accounts can virtually do anything because he can add and remove administrator accounts and assign them access rights. He cannot, however, directly modify his own account rights.

Typically, the system administrator who created the site also creates an initial site administrator account for the person responsible for the site. The latter is then free to use this account to create other accounts and to designate them responsibilities.



## User Accounts and Profiles

User accounts and profiles are fundamental concepts for sending faxes.



Different concepts related to user accounts and profiles, and their relationship



## **Users**

Users are the individuals who can send and receive faxes. In addition to mail notification, users can view their sent, received and queued faxes. They can also re-submit sent faxes and cancel faxes being sent.

A user account simply contains an email address, password, an optional NT account name and a profile.

Site administrators are responsible for maintaining the list of users.



## **Profiles**

When a message is submitted to a gateway, a profile is required. It is usually retrieved from the sending user account, which is identified by a database lookup based on the message sender address. If no user matches the sender address, then the default profile, as specified in the site general settings, is used.

Profiles are used to validate the faxing options carried by a message, and to determine the outgoing fax transaction parameters. These parameters contain information about the sender, the recipients and transmission options.

Administrators maintain the list of profiles and apply them to users. A given profile may be assigned to any number of users.



## **Notifications**

A profile also includes notifications options that define the feedback submitted by the fax manager, when a fax transmission either is completed successfully or fails. Feedback consists of an email notification sent to the original message sender, and possibly a series of notifications sent to a list of additional destinations.

Simply speaking, notification, for an outbound fax, is an action to inform a destination that the transmission was completed. As we will see in the next section, notification form depends on the destination type. For example, the email notification to the message sender is an email containing transmission details and optionally a preview of the fax pages.

The format of the email notification is specified by a notification profile associated with a user profile.



## Destinations

A destination is an abstract concept that designates a notification endpoint or target. Destinations are used by incoming routing table entries for inbound fax routing, and by profiles for outbound fax feedback notifications. Administrators maintain destinations separately, so that each destination can be used in many profiles.

### There are two types of destinations:

#### Mail

Mail destinations are characterized by a standard SMTP address, to which an email is sent as notification. The format of the message is specified by a notification profile associated with the mail destination.

#### Printer

Printer destinations simply designate printers on which fax pages can be sent upon notification.

Site administrators have access to the complete list of faxes (sent, received or queued) that belong to the site. Conversely, users have a limited view of faxes they are sending, have sent or received.

Administrators, like users, can cancel faxes being sent and resubmit sent faxes. Additionally, administrators can re-route received faxes. These actions are presented in greater detail in a separate technical note.



## Cloud Fax Admin Interface Login

<https://cloudfax.nex-tech.com/faxadmin>

Enter your username and password, select Site Administrator, Enter your site name

Administrator name:

Password:

☐ System Administrator  
☒ Site Administrator

Site Name:

☐ Remember me on this computer

Login

### Site Administrator can make changes:

- Create and Edit Existing Internal Users
- Create Profiles for Users Rights
- Administer Cover Sheets
- Create Billing Groups
- Set Notification Destinations



## Creating and Editing Internal Users

XMediusFAX > Configuration > Internal Users

**NEXTECH**  
Your Broadband & Technology Company

**Configuration** | Monitor | Phone Books

**Internal Users**

- Profiles
- Cover Sheets
- Billing Group
- Notification Destinations
  - Mail
  - Printers

**User Properties**

**User** | Personal Information

SMTP Address:  **SMTP address is the users login and also must be unique**

Profile Name: Basic

NT Account:

Password

☒ Auto-generate a password

☐ Use this password

Password:

Confirm Password:

☒ Send the password by email

☒ User must change password at next login

Time Zone

Time Zone: Chicago

OK Cancel

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**User Properties**

**User** | Personal Information

**Personal Information**

Salutation:

First Name: Ivan

Last Name: Facsin **Filling out Personal Information will be used to populate coversheets automatically. Fill out as much information as you wish but at a minimum provide a First and Last Name and Fax Number.**

Title:

Cellular:

Pager:

**Billing Information**

Billing Code:

Sub Billing Code:

**Organization Information**

Organization:

Address:

City:

State:

Country:

Zip:

**Phone Number Information**

Phone:

Fax: 7856212998 **Fax Number must be 10 digits in length with no dashes, spaces or periods**

OK Cancel



## Profile

### Important Fields in Profiles

XMediusFAX > Configuration > Profiles

**NEXTECH**  
Your Broadband & Technology Company

**Configuration** | Monitor | Phone Books

Internal Users  
Profiles  
Cover Sheets  
Billing Group  
Notification Destinations  
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Printers

**Profile Properties**

Profile | Cover Sheets | Phone Books | Billing Codes | Fax Options | Security | Notification

Priority  
Default: Normal  
Maximum: Normal

Retries  
Default: 3  
Maximum: 3  
Delay Between Retries (min): 5

Resolution  
Default: High  
Maximum: High

Other Options  
Submitted Fax Timeout (min): 240  
**CSID:**  *Allows you to override individual users outbound caller ID leave blank unless you want everyone's outbound caller id to be the same*  
Fax Header: @@TRANSDATE{10} @@TRANSTIME{8}

☒ Notify Success  
☒ Notify Failed  
☐ Broadcast Notification  
☒ Notify Inbound Success  
☒ Notify Inbound Failed  
☒ Include Message Body When Sending Fax

OK Cancel

XMediusFAX > Configuration > Profiles

**NEXTECH**  
Your Broadband & Technology Company

**Configuration** | Monitor | Phone Books

Internal Users  
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Notification Destinations  
Mail  
Printers

**Profile Properties**

Profile | Cover Sheets | Phone Books | Billing Codes | Fax Options | Security | Notification

User Options  
☒ User is allowed to fax  
☒ User may attach a Cover Sheet  
☐ User must use a Cover Sheet  
☒ User can download faxes from the Web Client  
☒ User has access to the Fax Event Log

Authentication Options  
☒ SendFAX through XML Gateway requires authentication  
☒ SMTP messages require authentication *Always leave these options enabled*

Override Policy - Organization Information  
☒ User can override the information  
☐ User cannot override the information (reject the sending)  
☐ User cannot override the information (allow the sending with default settings)

Override Policy - Fax Options  
☒ User can override the information  
☐ User cannot override the information (reject the sending)  
☐ User cannot override the information (allow the sending with default settings)

Number Restrictions  
Restriction Group: None

OK Cancel



## Fax Monitoring

Monitor tab allow Administrators to view the history of inbound/outbound/queued faxes. From the screen shot below, you can see that a few faxes have come in, see the DID that was called, calling number, and they all have no errors.

The screenshot shows the NEXTECH Monitor tab with the Inbound History section selected. A table lists received faxes with columns for Received Time, DNIS/DID, ANI, and Error Code. All error codes are 0.

Received Time	DNIS/DID	ANI	Error Code
Jul 19 2017 04:17 PM	7856212998	7856212997	0
Jul 19 2017 01:31 PM	7856212998	7856212997	0
Jul 19 2017 12:06 PM	7856212998	7856212997	0
Jul 19 2017 01:34 AM	7856212998	7856212997	0
Jul 18 2017 03:36 PM	7856212998	7856212997	0
Jul 18 2017 02:26 PM	7856212998	7856212997	0
Jul 18 2017 01:43 PM	7856212998	7856212997	0
Jul 18 2017 01:37 PM	7856212998	7856212997	0



You can view any of the faxes to see logs of what actions occurred, who received the faxes and times of when emails were sent.

The screenshot shows the NEXTECH Monitor tab with the Fax Properties section selected. The Fax Properties tab is active, displaying details for a specific fax.

**Fax Properties**

**Fax Information**

Status: Received  
DNIS/DID: 7856212998  
ANI: 7856212997  
DTMF:  
Transaction ID: D611A2BB-069C-4191-9D94-5FB46C14338E-10-IF

**Error Information**

Error Code: 0 [More](#)  
Description: No error.

**Transmission Information**

Local CSID:  
Remote CSID: 7856212997  
Channel Number: 2  
Speed: 14400

**Time and Size Information**

Received Time: Jul 19 2017 04:17 PM  
Archived Time: Jul 19 2017 04:17 PM  
Duration: 37  
Pages Received: 1

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