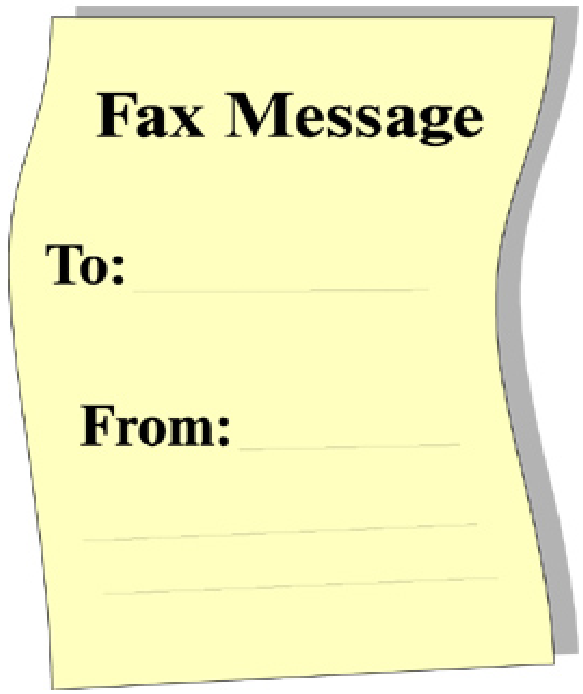


FAXCOM

USER GUIDE

FAXCOM User Guide

The FAXCOM Web Client is a standalone application used to send, receive and manage faxes. FAXCOM will replace FaxPress Plus and will allow users to:

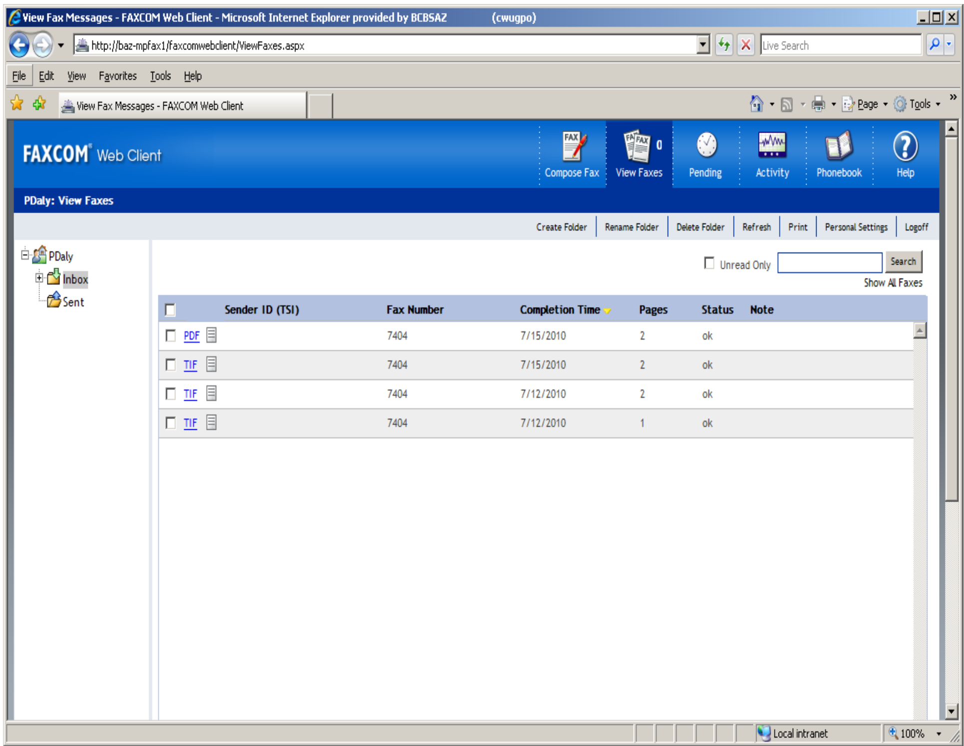
- Send a fax
- Receive new fax
- Email a fax to a specific user or distribution list
- Forward a fax to an email address or distribution list
- Clipboard a fax
- Print a fax to a specific printer
- Route faxes to a person or distribution list
- Forward a fax to other fax users or groups
- Move a copy of a fax to a specified client subfolder
- Save a fax in a FAXCOM Client folder
- Archive and delete faxes

In this section you will learn how to:

Access FAXCOM
Receive a Fax
Compose/Send a Fax
Fax from a Windows Document
Forward a Fax to a Specific User or Department Box
Preview a Fax before Sending
Print to Clipboard and Save a Fax to FileNet
View the Pending Queue
View the Activity Log
Use a Phonebook
Add Entries to a Private Phonebook
Add Entries When Composing a Fax

Accessing FAXCOM:

1. **Click** the **Internet Explorer** icon. The Planet Blue Homepage will appear.
2. **Click Favorites** and **select** the **FAXCOM** option from the drop down menu. The **FAXCOM Web Client** will appear:



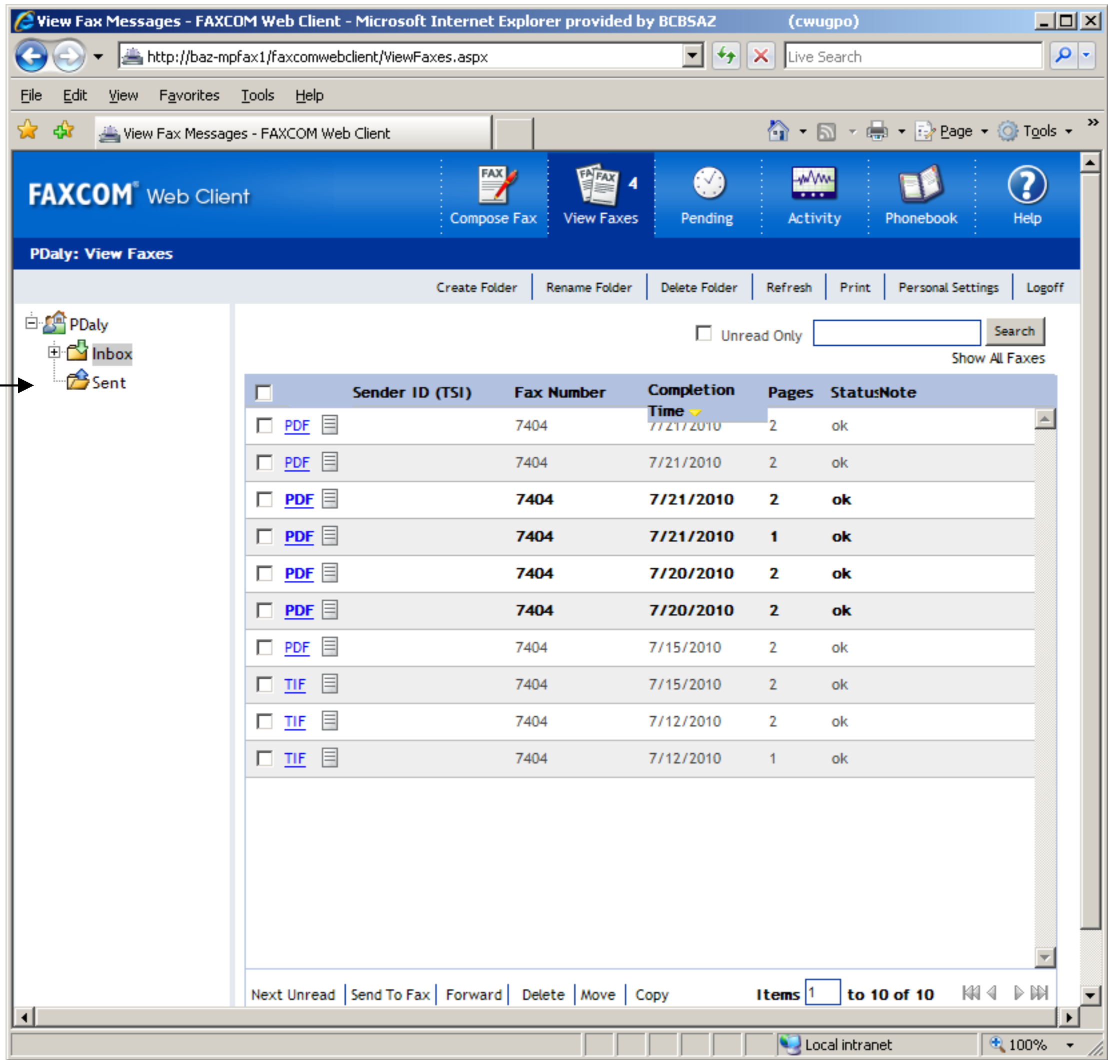
The View Fax Messages window is the default window and displays the following icon options:

- **Compose Fax**
- **View Faxes**
- **Pending**
- **Activity**
- **Phonebook**
- **Create Folder**
- **Rename Folder**
- **Delete Folder**
- **Refresh**
- **Print**
- **Personal Settings**
- **Logoff**

Receiving a Fax:

1. **Select** the **appropriate folder** from the View Fax Messages window.
2. **Click** the **PDF** (Portable Document Format- standard for document exchange) **hyperlink** to view the fax.

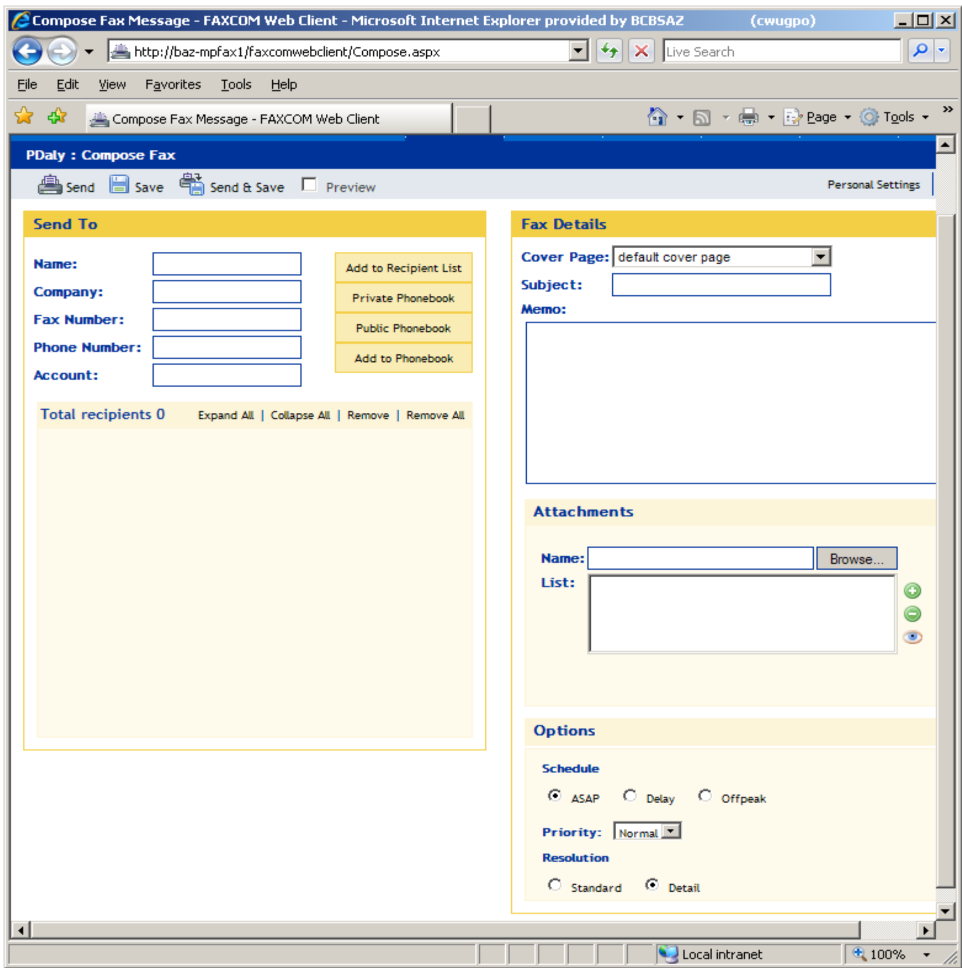
Folders



3. **Click** the **check box** next to the desired **fax**.
4. **Click** the appropriate **action** located at the bottom of the window:
   - **Next Unread** - moves to next unread fax
   - **Send To Fax** - sends fax to a new recipient
   - **Forward** - forwards fax to a specific user or department box
   - **Delete** - deletes a fax
   - **Move** - moves a fax to a specific folder
   - **Copy** - copies a fax to another folder, multiple folders or an archived folder

Composing/Sending a Fax:

1. **Click** the **Compose Fax** icon. The Compose Fax Message window will appear.
2. **Complete** the following information in the **Send To** block:
   - **Name**
   - **Company**
   - **Fax Number**
   - **Phone Number** (not required)
   - **Account Number** (not required)



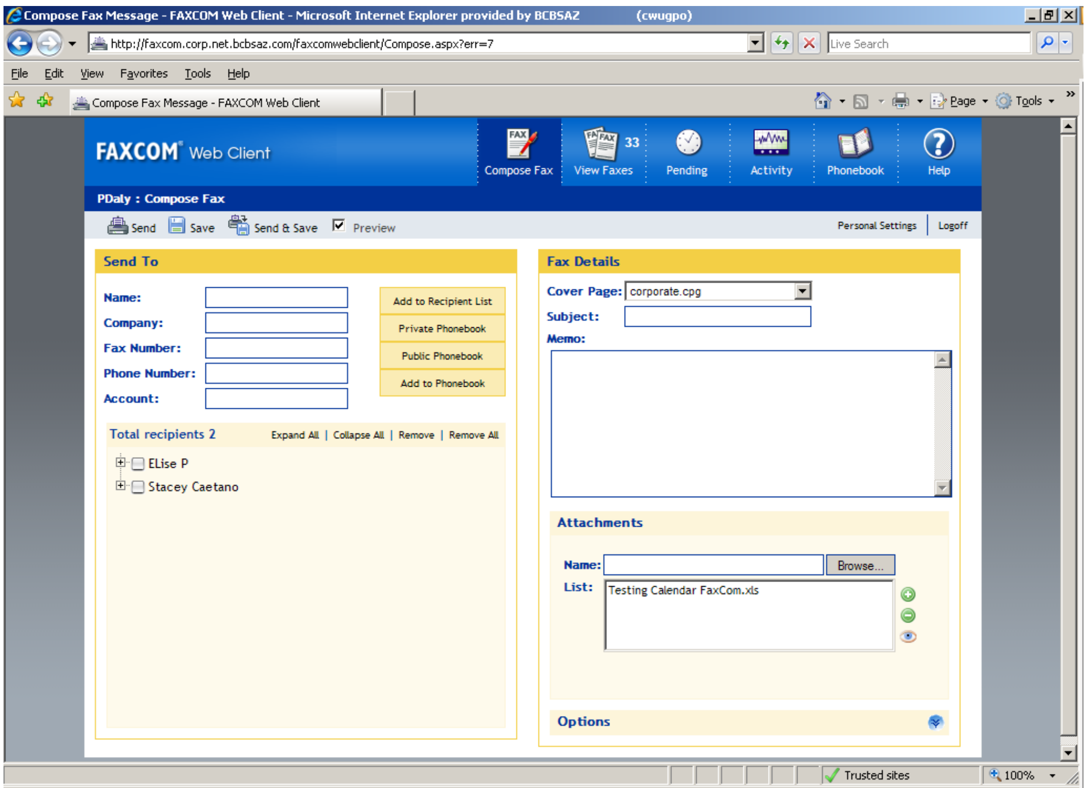
3. **Complete** the **Fax Details** block including:
   - **Cover Page** - select from drop down menu
   - **Subject** - required when attaching a document
   - **Memo** - used when sending a brief fax memo or to add additional text
   - **Attachments** - select Windows document from Browse button to attach a Windows document.

- **Options**
  - **Schedule -** allows fax to be sent ASAP or held/delayed and then sent on a specific date and time or during off peak hours
  - **Priority** - allows user to select Low, Normal or High priority

4. **Click** the **Send**, **Save** or **Send & Save** icon. The fax has now been sent.

Faxing from a Windows Document:

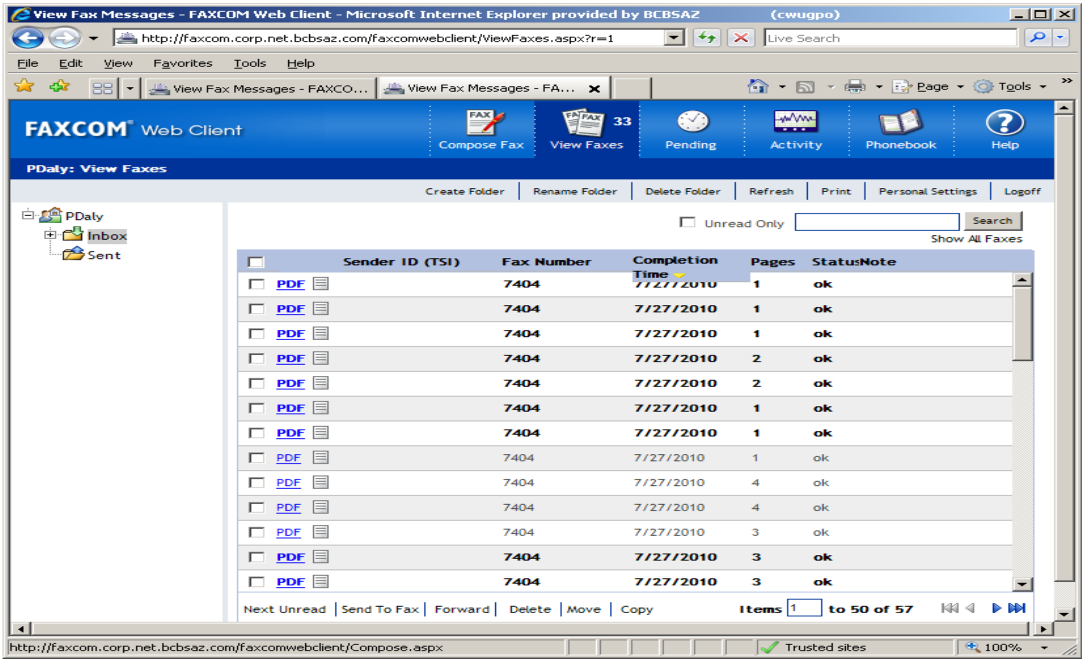
1. **Access** the document in the windows application (example Word or Excel).
2. **Click File, Print**.
3. **Select** the **Biscom Fax Printer** option from the drop down menu.
4. **Click OK**. The Compose Fax Message window will appear displaying the document to be attached in the List box in the Attachments block:



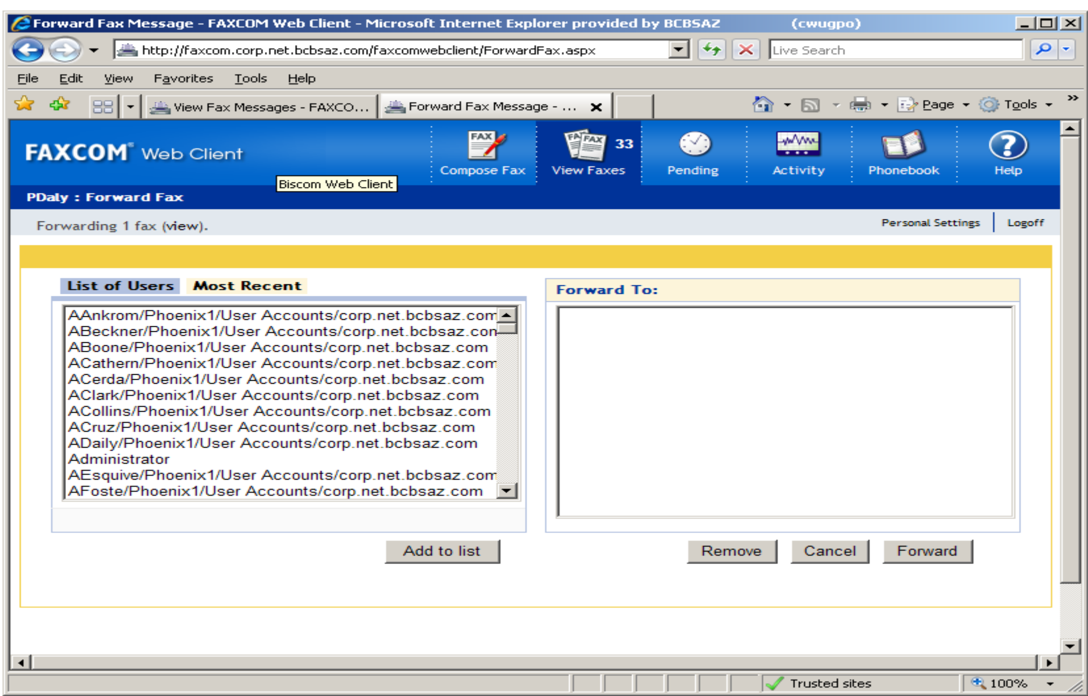
5. **Complete** the **Send To** and **Fax Details** blocks.
6. **Click Send, Save** or **Send & Save.** The fax, along with the attachment, has now been sent.

Forwarding a Fax to a Specific User or Department Box:

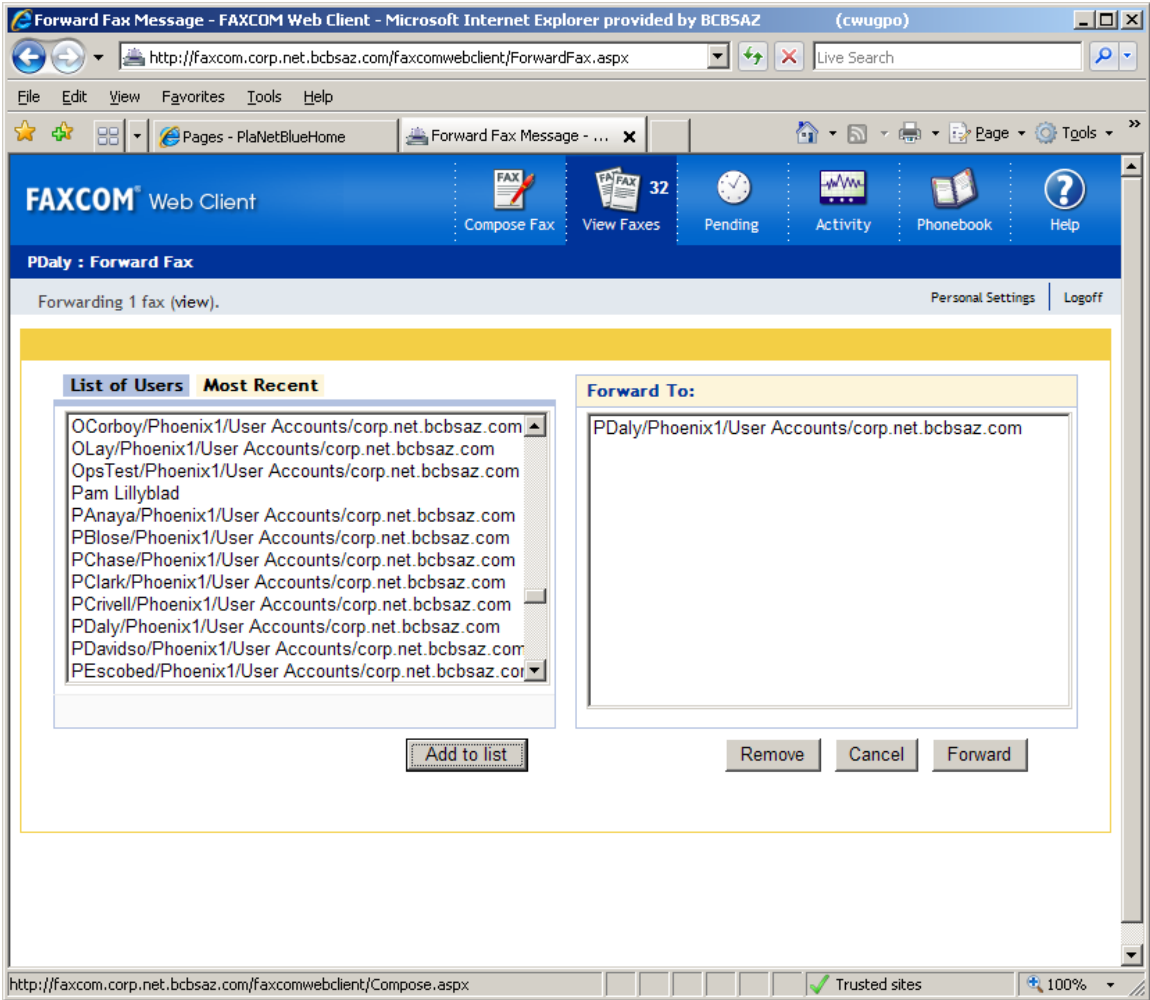
1. **Select** the **check box** next to the fax or faxes to be forwarded.



2. **Click** the **Forward** action option located at the bottom of the window. The Forward Fax Message window will appear with the list of FAXCOM users and department boxes:



3. **Select** the user/users that the fax is being forwarded to.
4. **Click the Add to list** button. The user/users will appear in the **Forward To** box:

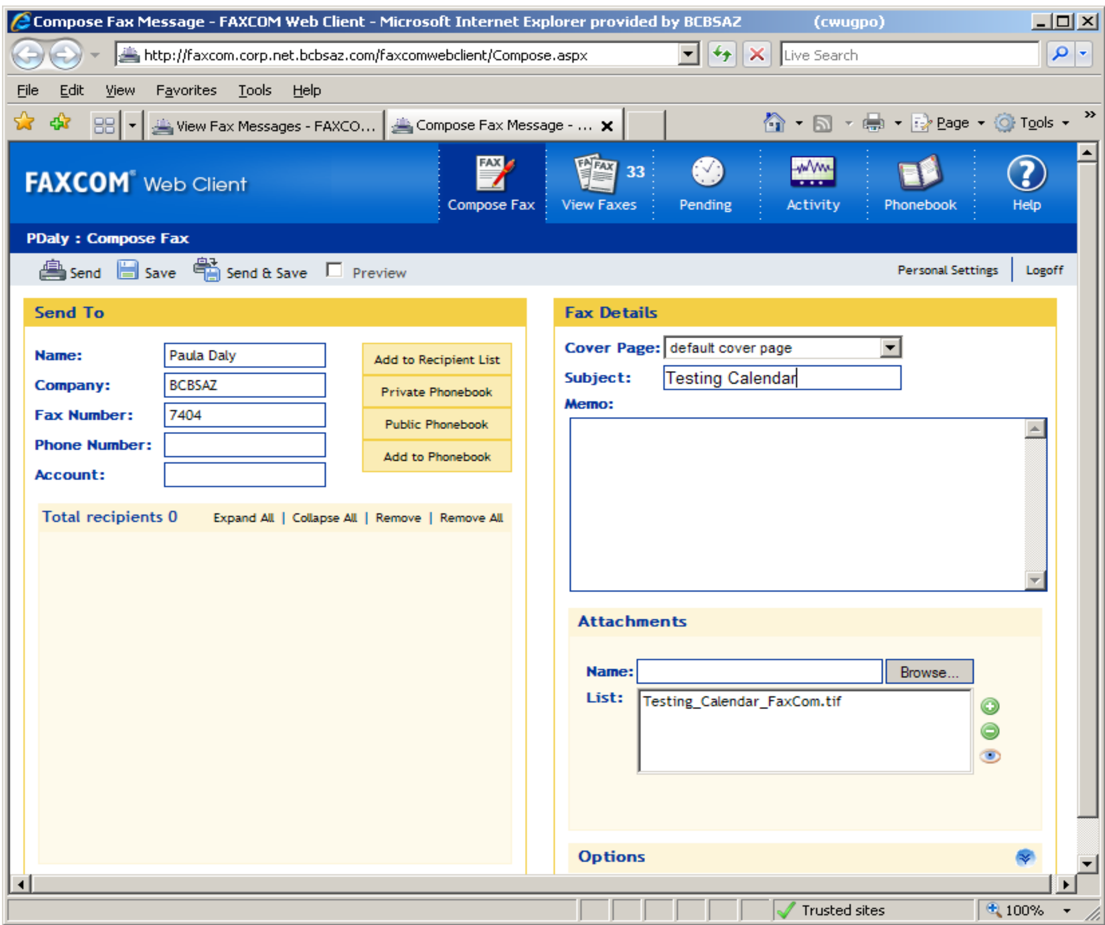


5. **Click** the **Forward** button. The fax will be forwarded. The View Fax Messages window will reappear.

Previewing a Fax before Sending:

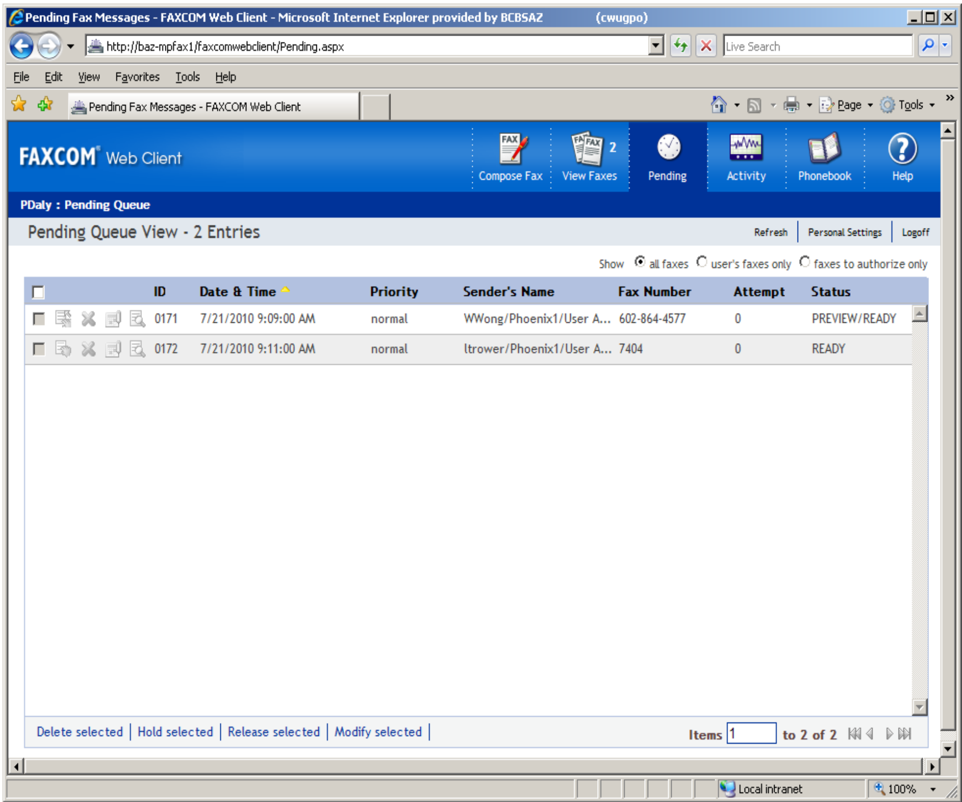
There are two ways to preview a fax. Directly from the Compose Fax Message window or from the Pending Fax Messages window when the fax is on hold or delayed.

1. **Select** the **fax/document** in the List box.
2. **Click** the  **icon** in the Fax Details box. The fax will appear.
3. **Close** the fax to return to the Compose Fax Message window.
4. **Click** the **Send, Save** or **Send & Save icon.** The fax has now been sent.



When a fax has been put on hold or delayed in the Options block, the fax can only be viewed in the Pending Fax Messages window.

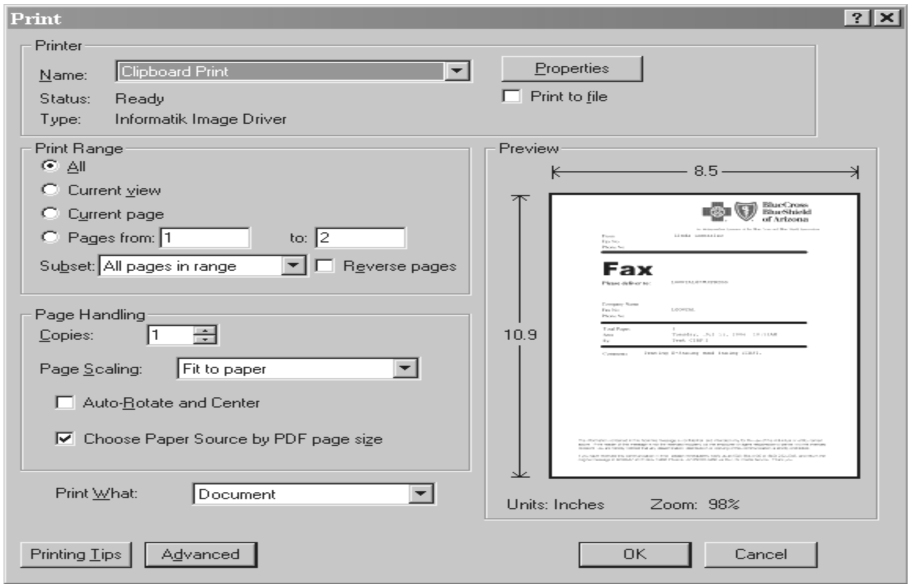
1. **Click** the **Preview** check box located at the top of the Compose Fax Message window. The Pending Fax Messages window will appear:



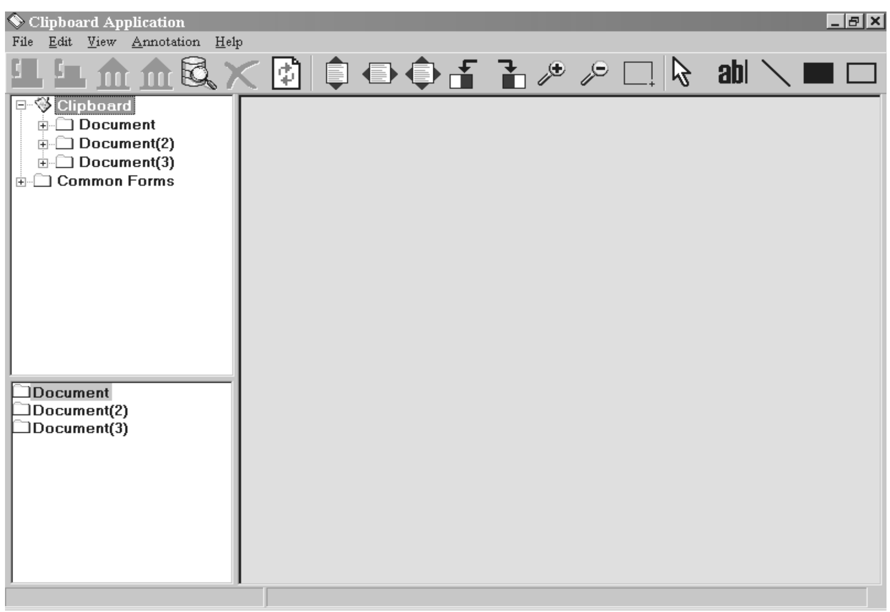
2. **Click** the **Preview** icon on the selected fax. The fax will appear.
3. **Exit** the fax to return to the Pending Fax Messages window.

Printing to Clipboard and Saving a Fax to FileNet:

1. **Click** the **PDF hyperlink** to be printed to Clipboard. The selected fax will appear.
2. **Click File, Print**. The Print dialog box will appear:

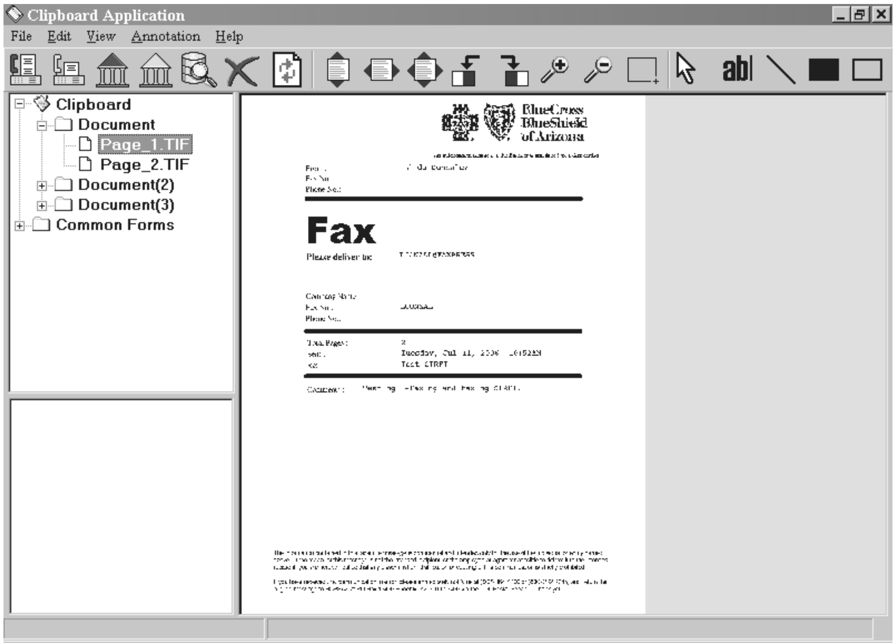


3. **Select ClipBoard Print** in the **Printer Name** field.
4. **Click OK**. The ClipBoard Application window will appear:



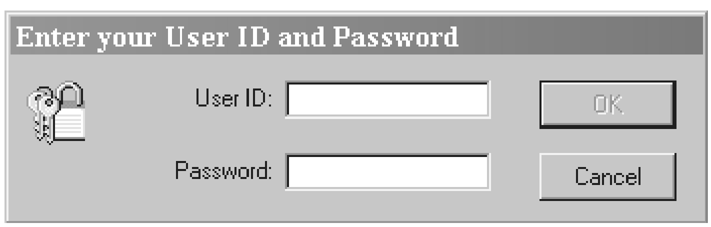
5. **Click** the appropriate **Document Folder** to view the fax. All the fax pages will display in the lower left side of the window.

6. **Click** the **first page** to be sent to FileNet. The Clipboard Application window will reappear with the fax information displaying on the right side of the window:

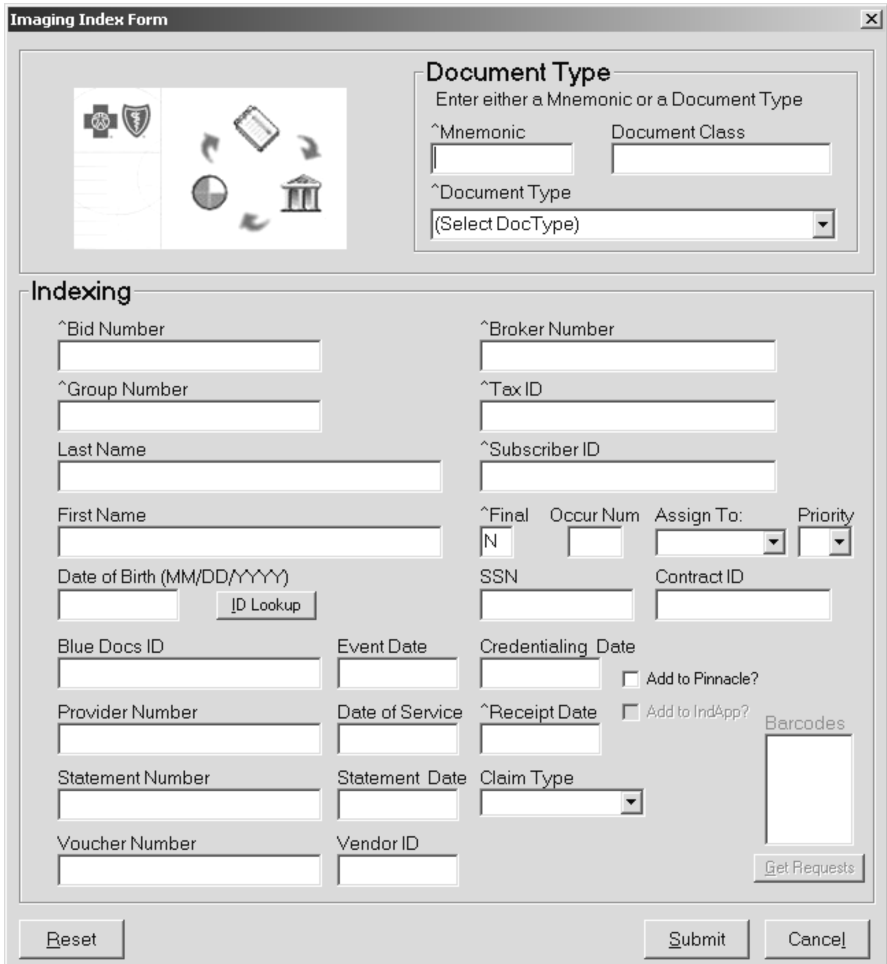


NOTE: Highlight all pages in the document to ensure proper filming.

7. **Click** the **Save to FileNet, Delete Document** icon  to save the document to FileNet (Image Retriever). The Enter your User ID and Password dialog box will appear:



8. **Enter** the **User ID** and **Password** currently used for Image Retriever. The Imaging Index Form will appear:



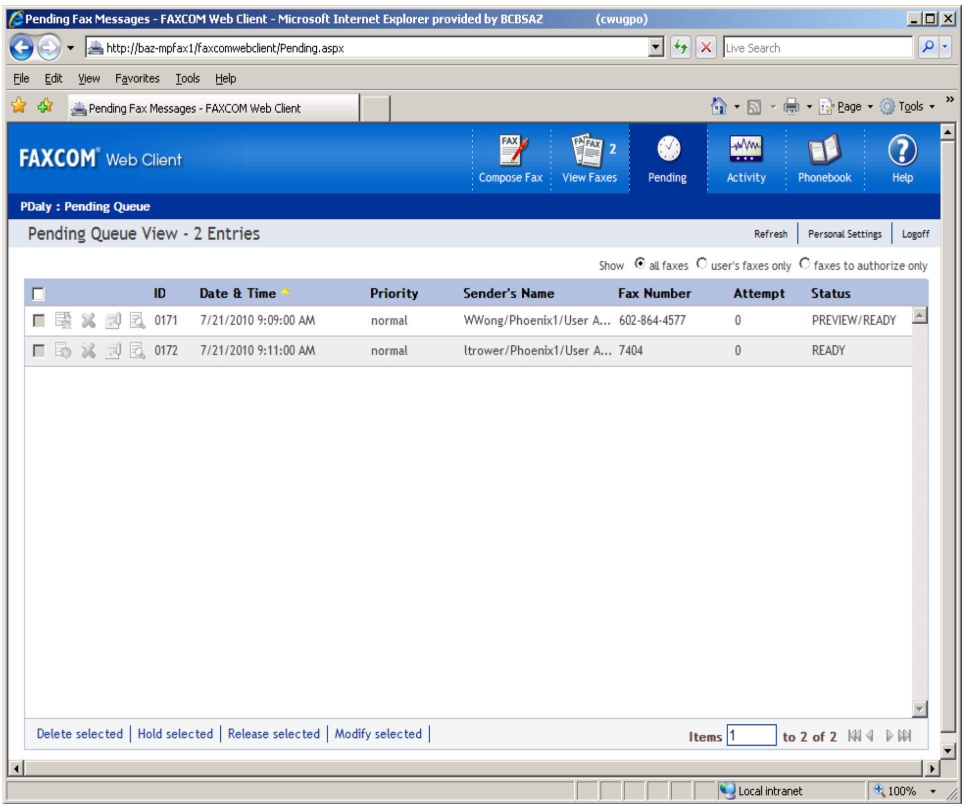
9. **Click** the **down arrow** in the **Document Type** field to select the appropriate document type.
10. **Enter** the following **required fields**:
    - **Last Name**
    - **First Name**
    - **Subscriber ID**
    - **Date of Birth**
    - **Claim Type** (if applicable)
11. **Click Submit**. The file will successfully be sent to FileNet.

NOTE: A copy is saved in the Cache files and a copy is saved in Image Retriever to be processed as a new claim to SOURCE CORE or as Correspondence to be batched depending on the selection.

Viewing the Pending Queue:

The Pending Queue lists all faxes queued for transmission and enables a user to see where the fax is located in the queue. A user can select and make any final changes to the transmission status and destination number of the fax.

1. **Click** the **Pending Queue** icon to display faxes in the Pending Queue. The Pending Fax Messages window will appear:



2. **View** the following:
   - **ID** - four digit number used to track the fax
   - **Date & Time** - when the fax will be transmitted
   - **Priority** - specified for the transmission
   - **Sender's Name** - name of the originator of the fax
   - **Fax Number** - destination fax number
   - **Attempt** - number of transmission attempts
   - **Status** - condition of the fax server

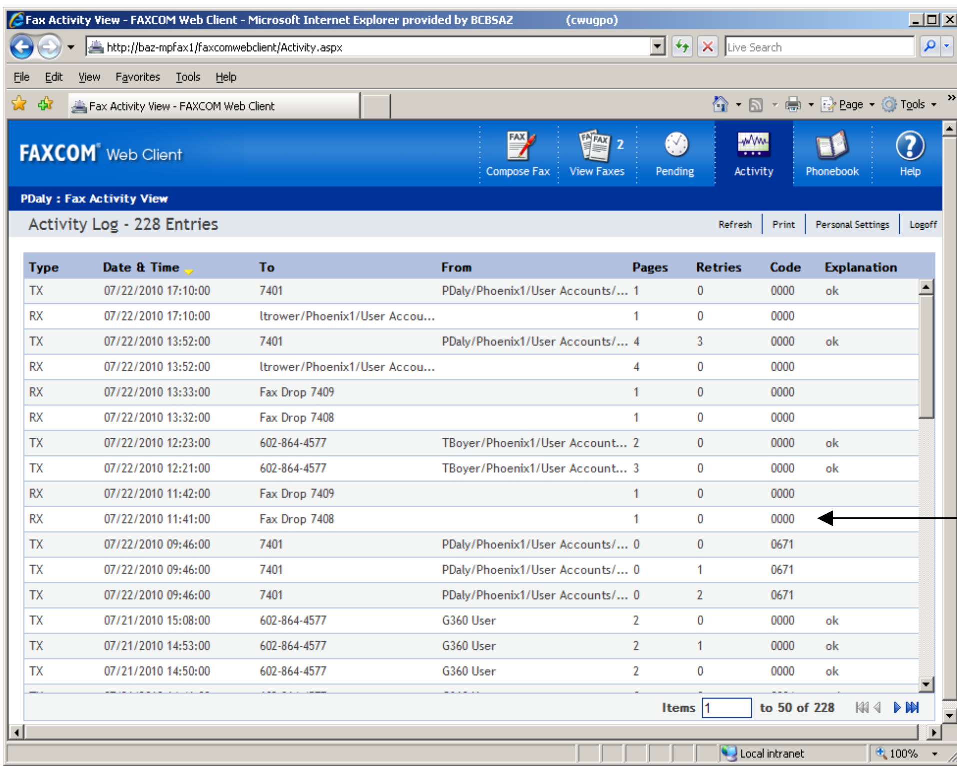
3. **Click** the **check box** to select the fax.

4. **Select** the appropriate **action** at the bottom of the window:
   - Delete selected - deletes the fax
   - Hold selected - places the fax on hold
   - Release selected - releases the fax to be sent
   - Modify selected - allows modifications to the fax

Viewing the Activity Log:

The Activity Log lists all attempted fax transmissions, both successful and unsuccessful and all received faxes for the entire fax service.

1. **Click** the **Activity** icon. The Fax Activity View window will appear:



Transmission code 0000 indicates a successful transmission.

2. **View** the following:
   - **Type** - unique identifying number used to track the fax
   - **Date & Time** - the date and time the fax transmittal was completed
   - **To** - destination fax number
   - **From** - name of the originator of the fax
   - **Pages** - number of pages of the fax
   - **Retries** - number of transmission attempts
   - **Code** - status code for successful and unsuccessful transmissions
   - **Explanation** - up to a four letter abbreviation for the status code

Using a Phonebook:

All users will have access to view, add and submit faxes from their Private Phonebook. Only individuals designated as Public Phonebook managers will have the authorization to manage and view the Public Phonebook.

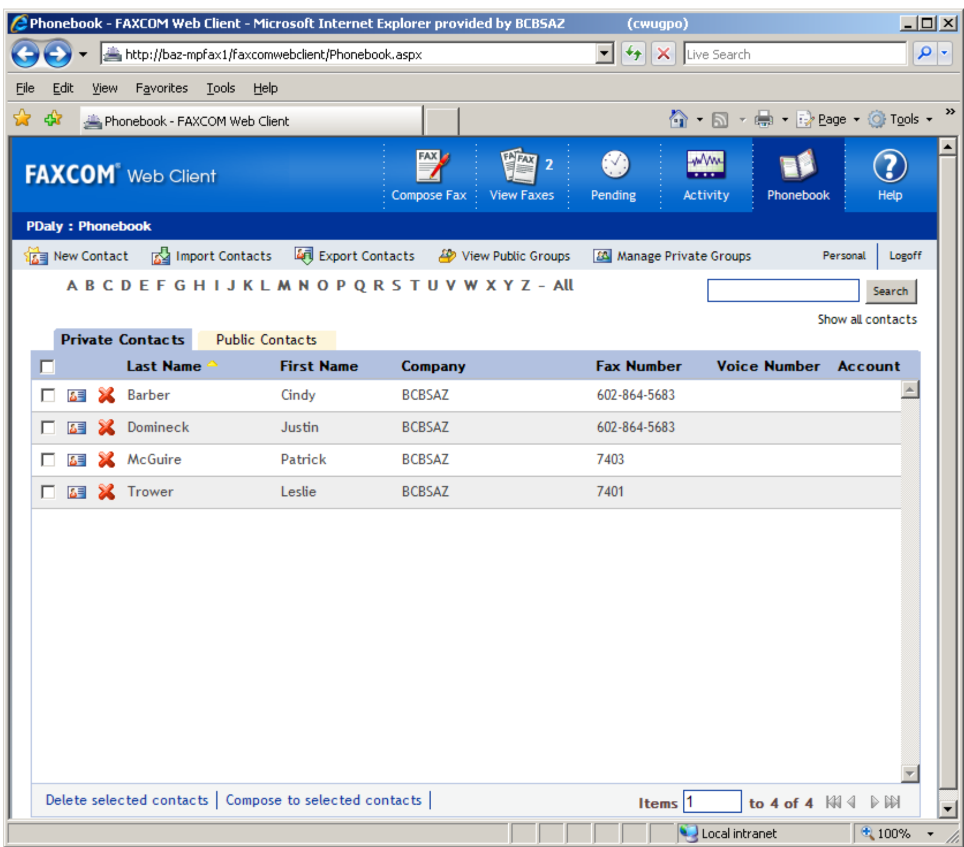
Adding Entries to a Private Phonebook:

There are two ways to add entries to a Private Phonebook:

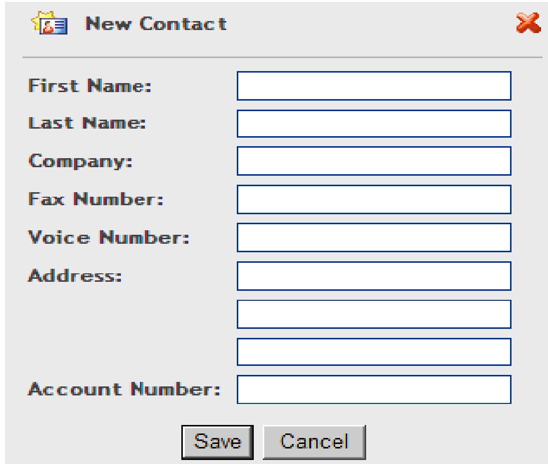
- Open the Private phonebook directly by clicking the phonebook icon
- Automatically adding a fax recipient to the Private phonebook when composing a fax from the Send Fax dialog box

Adding Entries Directly to the Phonebook:

1. **Click the Phonebook** icon.
2. **Click** the **Private Contacts** tab. A list of private contacts will display:



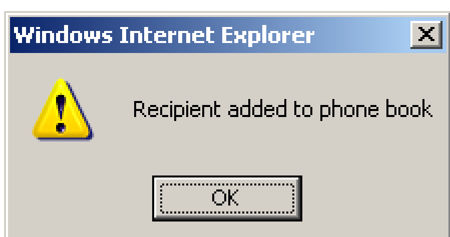
3. **Click** the **New Contact** icon. The New Contact dialog box will appear:



4. **Complete** the following **required fields**:
   - **First Name**
   - **Last Name**
   - **Company**
   - **Fax Number**
5. **Click Save.** The Contact will now appear in the Private Contacts list.

Adding Entries When Composing a Fax:

1. **Click** the **Compose Fax** icon.
2. **Complete** the required fields in the **Send To** block.
3. **Click** the **Add to Phonebook** button. The Recipient added to phone book message will appear:



4. **Click OK.** The Contact will now appear in the Private Contacts list.