

WELCOME TO OPENTEXT

This brief Administrator Reference Guide will assist you in managing your Fax2Mail Service.

ADMINISTRATION TAB

Go to <https://myportal.opentext.com>

Log in with either your email address or fax number
Select **“Administration”** tab

Menu allows you to add, modify and remove users from your account. As a user with Administrative rights, you have the ability to:

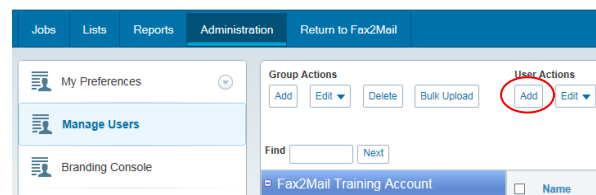
- Provision New Users
- Create Groups
- Re-Parent users to another Group
- View all activity of users
- Edit Preferences for users
- Manage Fax Numbers

Note: ▼ - represents a drop down menu

ADDING A USER

To add a new user click on the Administrator tab

- Select **“Manage Users”**
- Click the group in which you want to add the user
- Under **“User Actions”** select **“Add”**



- Complete the user information

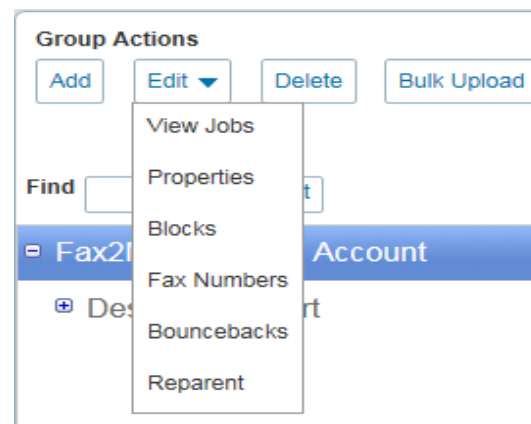
Note: Mandatory fields are **“Name”** and **“Email Address”**

- The default account is Send Only. To assign a Fax2Mail number select the drop down option on the **“Fax Number”** field and select **“Select/Change”**
- Click **“Add User”** button on the bottom of the page to save

Note: Bulk Upload functionality is available for lists of new users. Additional details are located in the User Guide under the Account Administrator Task.

MANAGE GROUPS

Group Actions allows you to manage Group properties such as Add/Edit/Delete and Manage Fax Numbers



Add a Group

- To create a new group, click the group name
- Click **“Add”** button
- Enter the name of the new group and click **“Add Group”**.

Edit Group Properties

- Click on a group name
- Select **Edit ▼** from Group Actions and select **“Properties”**.

- If you check **“Apply to Subgroups”** all users within sub groups will include new settings

Re-assigning a user to a different Group

- Select group
- Select user and click **Edit ▼** under the User Actions select **“Reparent”**
- Select group name and click **“Select”**

Manage Fax numbers

Allows you to view/reserve/release/reclaim fax numbers for your account

Fax Number	Status
16312237223	available
18442725500	available
19702375488	available
12485653534 (Recycle on 12/20/2016 05:00 GMT)	recycled
13162212559 (Recycle on 12/30/2016 05:00 GMT)	recycled
33144925823 (Recycle on 12/29/2016 05:00 GMT)	recycled



- Export all fax numbers: Provides list of fax numbers assigned to an account

- Reserve additional fax numbers for new users

Reserve Fax Numbers

Please choose the country and region where you would like your fax number(s):

Country	<input type="text" value="United States"/>
Region	<input type="text" value="New Jersey"/>
Area/City Code	<input type="text" value="1-732"/>
How many fax numbers would you like?	<input type="text"/>

- Release fax numbers: Removes unwanted fax numbers
- Reclaim fax numbers previously released: You have 14 days to reclaim a released fax number
- Reserved Number Count: Lists the available fax numbers by area code

BLOCKING NUMBERS

Fax2Mail allows you to block calls for an individual user or group.

Group Level blocking:

- Select Group
- Select **Edit** ▼ from Group Actions and select Blocks
- A form will appear on the screen. Up to 5 numbers can be added to block or unblock

User Level Blocking:

- Select Group
- Select User
- Select **Edit** ▼ from User Actions and select Blocks
- A form will appear on the screen. Up to 5 numbers can be added to block or unblock

Note: Blocks take effect within 24 hours.

VIEWING ACTIVITY

An administrator can view activity for the account, group or an individual user.

Viewing User Activity

- Select Group
- Select User
- Select **Edit** ▼ from User Actions and select View Jobs
- To search for a specific time or job use the “Advanced Search” button to modify your query

Job Search Filter

Job ID	<input type="text"/>
Job Type	<input type="text" value="Show All"/>
Job Status	<input type="text" value="Show All"/>
Job Sent Between	<input type="text" value="Dec 16, 2016"/> <input type="text" value="00:00"/> <input type="text" value="Dec 21, 2016"/> <input type="text" value="15:22"/>
Billing Code	<input type="text"/>
Campaign Name (Cust Ref)	<input type="text"/>

To view a fax that was sent or received, select the download icon. You can now view delivery details, resend or redirect the fax.

- Click the job # to view delivery information

Job ID	Job Type	Status	Start Date	Completed Date	Billing Code	Customer Reference	Actions
<input type="checkbox"/> 1636218855	MCF	Complete	12/21/2016 14:18	12/21/2016 14:18	123456		
<input type="checkbox"/> 1636830803	F2M	Complete	12/21/2016 11:21	12/21/2016 11:20	123456		

Detail for job 1636218855	
Summary	Reports
<p>Job Properties</p> <p>Subject: [blank] List Name: [blank] Item: 1</p> <p>Delivery Type: express External System: 12/21/2016 14:18 User File Name: C:\Users\james\Desktop\AAA Fax2Mail.doc</p> <p>Job Summary</p> <p>Total: 1 Errors: 0 Processing: 0 Sent: 1 Cancelled/Invalid: 0 Blocked: 0</p>	

Viewing Group Activity

- Select Group
- Select **Edit** ▼ from Group Actions and View Jobs
- To search for a specific time or job use the “Advanced Search” button to modify your query

Job Search Filter

Job ID	<input type="text"/>
Job Type	<input type="text" value="Show All"/>
Job Status	<input type="text" value="Show All"/>
Job Sent Between	<input type="text" value="Dec 16, 2016"/> <input type="text" value="00:00"/> <input type="text" value="Dec 21, 2016"/> <input type="text" value="15:22"/>
Billing Code	<input type="text"/>
Campaign Name (Cust Ref)	<input type="text"/>

Viewing Activity For All users

- Click the Reports tab
- Select Message Management
- Under Item Level Query you can search by account, group or user

CUSTOMER SUPPORT

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Patents apply to this product: US Patent No. 4,994,926; US Patent No. 5,291,302

US Patent No. 5,459,584; Canadian Patent No. 1329852. Other patents are pending. <http://www.opentext.com/2/global/site-copyright.html>