Kofax Communication Server

TC/Web User Manual

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KOFAX

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Chapter 1

Preface

TC/Web Access is an internet application providing access to the Kofax Communication Server via a web browser. Because it is an internet application, no installation of a TC/Web client is necessary. It is immediately accessible from a web browser.

TC/Web is a multifunctional tool, intended to be used by both end-users and administrators of Kofax Communication Server services.

TC/Web enables end users to send and receive messages in a variety of media including email, fax, voice, and SMS. Users can create and edit recipient entries with multiple addresses, as well as lists of recipients.

As an interface to TC/Broadcast product, TC/Web enables users to send, manage and monitor broadcasts of up to 30,000 messages.

The Metamail feature saves storage space on mail systems. Large attachments are stored on the Kofax Communication Server rather than the mail server. The messages sent to the user include an internet hyperlink instead of the actual fax image or voicemail attachment. Clicking on the hyperlink opens a TC/Web message in a web browser, allowing access to the attachment stored on the Kofax Communication Server.

TC/Web enables administrators to view a list of users on the Kofax Communication Server. Administrators can change the basic properties of a user such as their name, company, and password, as well as lock and unlock a user account.

To assist in user support, a feature called “UserSwitch” enables an administrative user to view and edit some of the data of another user.

Important The Kofax Communication Server and its components formerly used the name TOPCALL. Some screen shots and texts in this manual may still use the former name.

Features

- Access to Kofax Communication Server without installing any components on the client PC
- Save storage capacity on linked mail system using Metamail feature
- Receive and send faxes from outside office
- Recipients and distribution lists can be maintained
- Application service provider can offer a unified messaging service using TC/Web Access
- Message Audit trail (who accessed which documents)
- Customers using TC/Broadcast may generate broadcast messages and monitor their progress

Requirements

This section describes the requirements.

Browser

TC/Web is accessed via a modern web browser. The following browsers are supported:

- Microsoft Internet Explorer version 6 and higher
- Mozilla Firefox

Browser Settings

The following settings must be enabled in the browser:

- Accept cookies
- JavaScript
- Java
- Popup windows must be allowed

Chapter 2

Standard Features

This section describes the standard features of TC/Web.

Getting Started

Login

To use TC/Web, a user must first login with a Username and Password.

If a user attempts to access any other page of TC/Web, the user will always be redirected to the login screen.

Picture 1: Login screen

Autologon

TC/Web can be configured to automatically log in a user. In this case, no login screen will be displayed.

There are two Autologon methods:

- Using Windows user name.
- Using Windows user name and domain name in username@domainname format.

Note When using both domain name and user name for Autologon:

- The user profile should already exist with the LAN Login right assigned.
- You cannot work with more than one tab in web browser; when an additional tab is opened, a login mask is shown.

For further details to enable this feature, see the *TC/Web Installation Manual.*

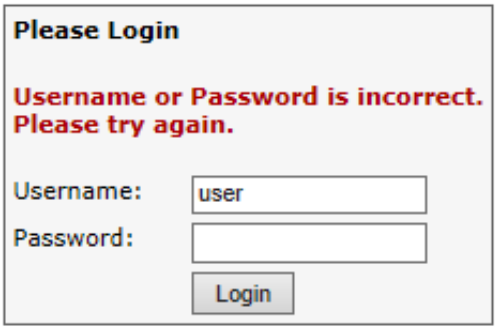
Customer field

If TC/Web runs in a Service Provider environment with multiple servers, the login form will also include a “Customer” field. This field is used to locate the proper server for the user.

Login Errors

There are several login errors.

You specified an incorrect user name or password.

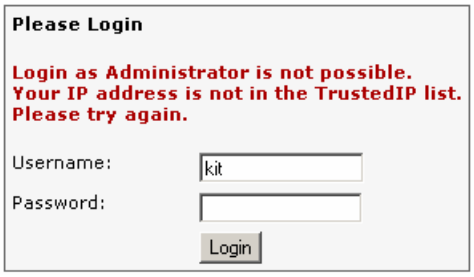


Picture 2: Incorrect user name or password

You are trying to log in as System administrator but Administrative logins are disabled.

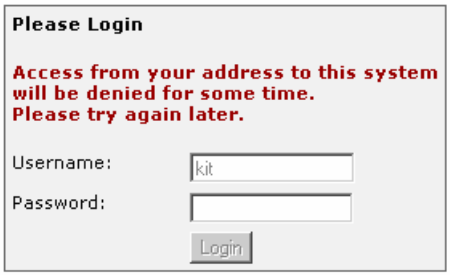
Picture 3: Administrative logins are disabled

You are trying to log in as System administrator but your IP address is not listed in the Trusted IP addresses list.



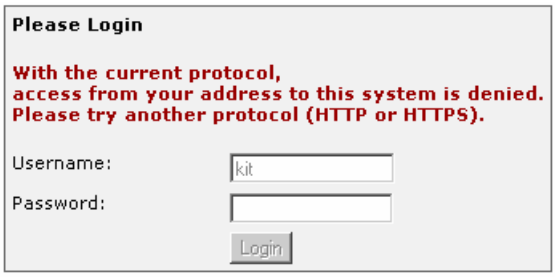
Picture 4: User's IP is not listed in Trusted IP list

You tried to log in with an incorrect username or password more times than allowed by the TC/Web configuration.



Picture 5: Access from user's IP address is blocked

You cannot access TC/Web with the current protocol. You must change the protocol to HTTP or HTTPS and try once again.



Picture 6: Access with current protocol is blocked

You are trying to log in as an Administrator but with a wrong protocol type. You must change the protocol to HTTP or HTTPS and try once again.

Picture 7: Administrative login with current protocol is blocked

User Inactivity Timeout

After a period of user inactivity, TC/Web will automatically log the user out. If a user tries to use TC/Web after this inactivity timeout has occurred, the user will be redirected to the Login screen with a message indicating what has happened.

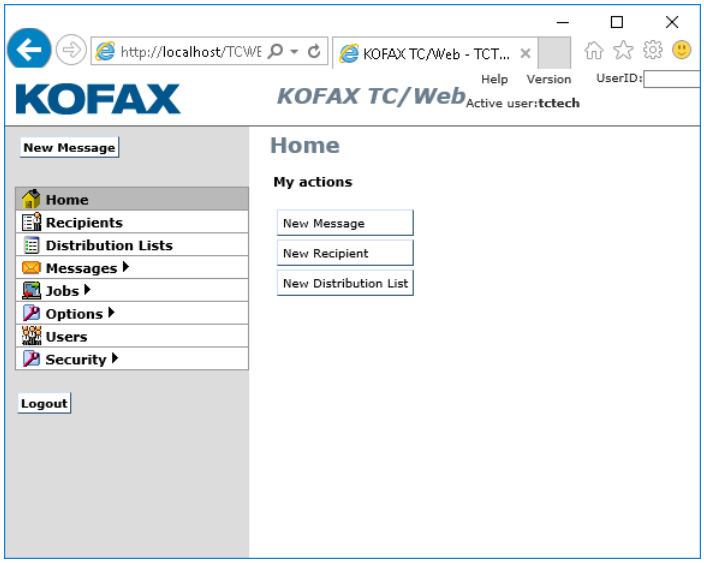
The User Inactivity Timeout is a security measure that ensures that no one can access the user's account when they are out of office for an extended period. Additionally, the inactivity timeout increases the system's performance.

The User Inactivity Timeout can be configured by the user in the **Options** > **Identify** tool.

General View After Login

After the user logged in, the following screen is displayed:

- There is a toolbar on the left.
- The top displays the active user. If the user is an administrator, additional fields for switching users are displayed.
- The large central area is where all tools will be displayed.



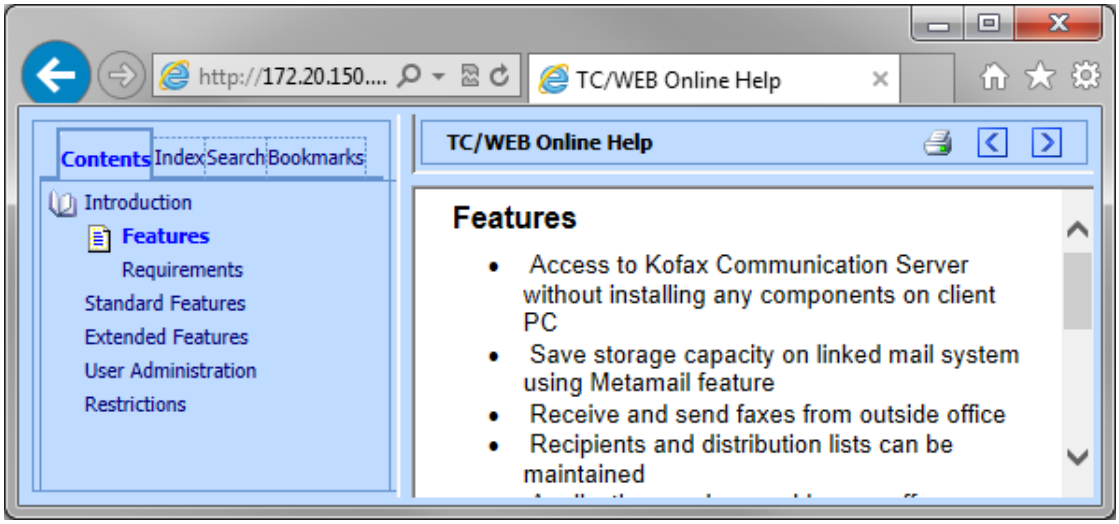
Picture 8: General view

User Manual in HTML Format

TC\Web User Manual is available online in HTML format. It can be accessed by clicking on Help link at the top of the screen.

Picture 9: Link to help

Note This online help is not context sensitive.



Picture 10: Help window

Toolbar

The toolbar on the left is used to access the TC/Web tools and other functionalities, such as to compose a message. All of the tools can be configured to be displayed or not.

Brief description of each tool:

New Message	Compose a new message
New Job	Compose a new broadcast job (TC/Broadcast only)
Home	Start page showing My Actions
Recipients	Create and edit recipients and their addresses
Distribution Lists	Create and edit distribution lists and select which recipients they contain
User Extensions	Configure which (phone/fax/…) extensions are routed to which user
Messages	
Inbox	View incoming messages
Outbox	View sent messages
Archive	View archived incoming and sent messages
Archive1-3	Additional views for archived incoming and sent messages
Public	View public folder (formally known as FIS folder)
Private	View private folder (formally known as Message folder)
System	View the system folder
Jobs (TC/Broadcast only)	
Active Jobs	View the currently active broadcast jobs
Problem Job Items	View the broadcast job orders that could not be sent
Completed Jobs	View the completed broadcast jobs
Options	
Identity	Edit the User Profile settings of the current user
Addresses	Edit addresses for the current user
Events	Edit events for the current user
Change Password	Change password of the current user
Settings	TC/Web settings for the current user
Job Notification	Edit job notification options (TC/Broadcast only)
Voice Settings	Voice settings for the current user
Users	List of all users in the system
Security	

Picture 11: Toolbar

Blocked IP List	List of IP addresses with blocked access to TC/Web	
Login/Logout Auditing	View the Login/Logout Auditing	
Logout	Log out the current user	

Message Views

Inbox

The Inbox shows all your incoming messages. Messages can be categorized as New Message, Read or Marked Completed, as shown by their corresponding status icons.

Outbox

The Outbox shows all messages you sent. For each recipient of a message, one entry line is created in the Outbox.

Archive

The Archive allows you to secure your messages, since all messages to and from all platforms are integrated into a single storage and retrieval point. Messages routed via the KCS messaging system as well as all messages sent via one of the supported mail clients are automatically archived making local storing or archiving of messages obsolete.

You can easily retrieve a message with the integrated search engine.

Public Folder

The public folder stores documents for easy retrieval. These stored documents are usually company documents such as leaflets, forms, price lists and any other information your company wants to make widely available.

Private Folder

Each user has one private folder on the KCS Server. You can store the messages and cover sheets you want to save in this folder.

System Folder

The system folder contains all the files, which can be accessed by the KCS administrator. These include all visible TCOSS files.

Tool View

This section describes the tool view.

Lists

Most of the TC/Web tools are composed of a list of items and several actions that can be performed on each item.

Clicking on an item in the list will open the item.

The list can only show a specific number of items on a page, similar to a web based search engine. The actual list is often longer than what can be displayed on the page. To see more items, the user can go

to the next page of items by clicking the **Next** link at the top of the list. Likewise, the user can return to previous pages by clicking the **Previous** link.

Note A system administrator can configure the number of items shown per page, which columns are present in a tool, the order of the columns, and the width of the columns.

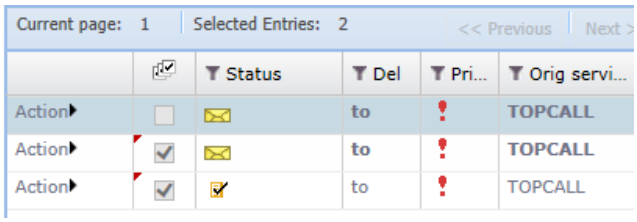
Performing Actions on a List Item

Actions can be performed in two ways: either by using the check box, or by using the Action menu.

Check Box

To select the items to perform the action on, the user checks the check boxes next to the item.

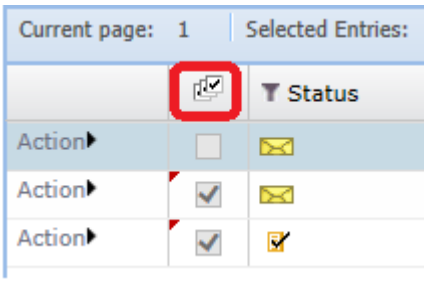
The number of selected messages count is updated according to the amount of selected messages.



Picture 12: Message selection

To perform the action, the user clicks one of the action buttons at the top of the tool. Some actions, such as “Mark Completed”, can be performed on multiple items. If an action can only be performed on one item, such as Forward, the action will be performed on the first selected item.

To select all currently visible items in a list click the **Select All** button in the list header above the check boxes.



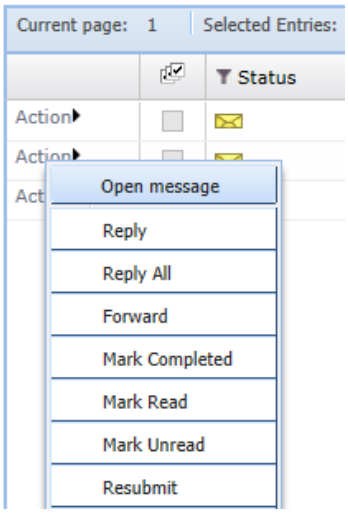
Picture 13: Select All button

Action Menu

The Action Menu is accessible via the **Action** button on the left side of each list item.

Simply click the **Action** button, and then select the desired action.

The Action Menu is context sensitive, showing only the available actions for the current item in the current tool.

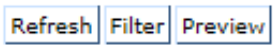


Picture 14: Action menu

Common Actions

The available actions are different in each tool, however there are several common actions:

- Refresh
- Filter
- Preview



Picture 15: Common actions

Refresh

Refresh updates the current list.

For example, clicking **Refresh** in the Inbox displays any newly arrived messages.

Picture 16: Refresh button

Filter

A user can reduce the number of items in a list by applying a filter on one or more columns. This is an effective way to search for specific items.

Filters can be set in two ways:

- **Master Filter**: The **Filter** button at the top of the tool displays a form with a control for every column in the tool.
- **Column Filter**: A small button below each column name displays a small window with the filter control only for that particular column.

Picture 17: Filter button

Filtering/searching in Message folders:

Filtering with a text field (except Archive folder) in Message server provides the following different filtering options:

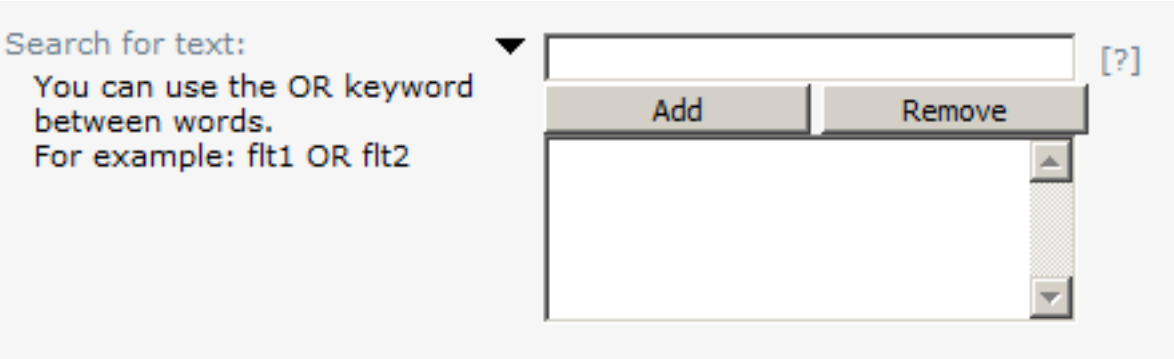
Search Description	Results
The filter is not case sensitive.	“greetings”, “GreEtinGs”, “GREETINGS” will all return “greetings”
Only items with an exact match are returned.	“tings” will not return “greetings” “greet” will not return “greetings” “greetings” will return “greetings”
The * can be used as wildcard at the beginning, end, or beginning and end.	“greet*”, “*tings”,”*etin*” will all return “greetings”

Filtering in Archive folder:

For filtering/searching in Archive, user always have to specify the beginning of a word. The exceptions of this are fax and telephone numbers which are extracting from the normalized address field, so that, it is possible to search also for parts on these number. For example, if a received fax has a “from” field like “+4318635320”, a search for “86353”, “35320”, “1863532”, etc. will be successful.

Filtering can be done using individual column filters or using the ‘Search for text:’ field.

Filtering using ‘Search for text’ field:



Picture 18: Search for text

Following content is searched for this field:

- Text content of message (includes OCR text blocks)
- Subject
- TCOSS user ID or queue of recipient
- TCOSS user ID or queue of originator
- Document number and page number
- Original message name

“Search for text” field provides the following different filtering options:

Search Description	Results
The filter is not case sensitive.	“greetings”, “GreEtinGs”, “GREETINGS” will all return “greetings”
The filter specify the beginning of a word that must be in the searched fields.	“gree” matches “greeting”, “my green car” but not “agree”
A dot “.” can be used to match for whole words.	“do.” matches “Do we” and “I do” but not “does”
If the text string is not having * at its end, * is internally added at end of string but it does not change behavior.	“gree” and “gree*” will return the same results.
The * at begin of string is not supported. It will return no result.	“*gree” does NOT match “gree”, “agree” and “green”
Keyword OR can be used while filtering by text in Archive (OR must be in uppercase.)	“fax1 OR fax2” will return “this is fax1” or “fax23”
For multiple text search, the texts are internally combined by a logical AND. You can use this by adding multiple texts and clicking the Add button to add the texts. **Note** The maximum number of texts that can be added to this search box is 9.	Search of “very” and “picture” matches the messages containing both “very” and “picture”. It returns “very big picture” but not “big picture”.

Filtering using other fields in Archive:

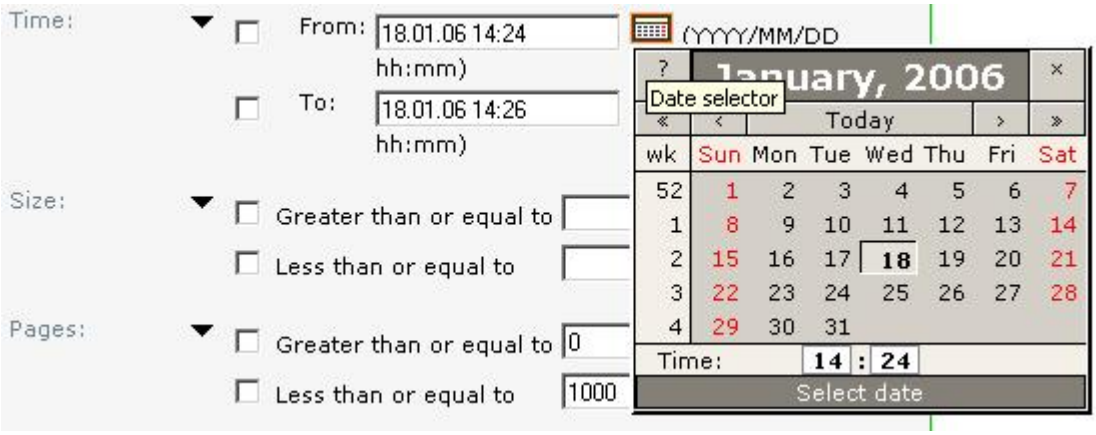
This search is used to search messages using particular fields, such as, Originator, Recipient and so forth.

Picture 19: Individual field search

All fields except “Search for text” field provide the following filtering options:

Search Description	Results
The filter is not case sensitive.	“greetings”, “GreEtinGs”, “GREETINGS” will all return “greetings”
The filter specify a word that must match the beginning of a word that must be in the searched fields.	“do” matches “Do we” and “I do” but not “does” “gree” matches “greeting”, “my green car” but not “agree”
A wildcard “*” can be used to match whole words.	“gree” and “gree*” will all return the same results.
The * at begin of string is not supported. It will return no result.	“*gree” does NOT match “gree”, “agree” and “green”

Date/Time filters behave in the same way as in the TCfW client application.



Picture 20: Popup calendar control

All filters with date/time values have popup calendar control, so the date can be entered from this control.

Filter Permissions

If the current user does not have the right to set a specific filter (e.g. filtering for the inbox of another user) the following error message will appear:

"This user doesn't have sufficient rights to view mails of his group"

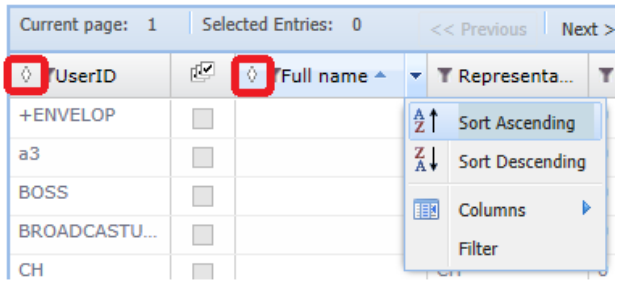
"This user doesn't have sufficient rights to view mails of user XXX or the user filtered for does not exist!"

Filter Saving

Whether the filter settings are saved when the user leaves a tool or logs out can be configured by the user in the **Options** > **Settings** tool.

Column Sorting

A small icon next to the column header indicates that the column can be sorted.



Picture 21: Column sorting

Click the icon or column header to resort the list.

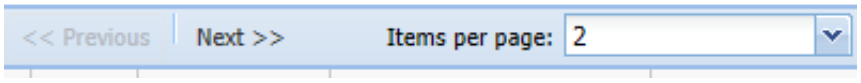
Each click toggles through the three sorting options, Ascending, Descending, or No sort.

Only one column can be sorted at a time. (There is no second sort order.)

Previous / Next Page

Moves forward or backward through the full list of entries.

In the Archive tool, the **Previous** link always moves to the first page.

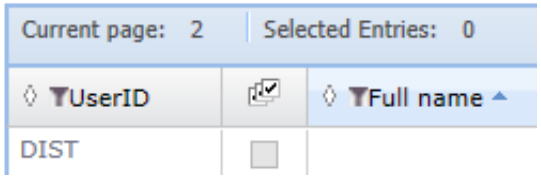


Picture 22: Next / previous page

Page Number

In all tools, the current page in the list of items the user is viewing is displayed at the top of the list as “Current Page: X”

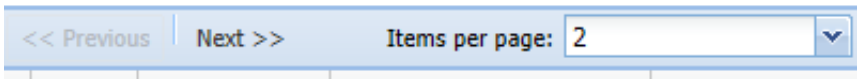
Additionally, in the Distribution List detail view, the total number of pages is also displayed, such as “Current Page: X of X”



Picture 23: Next / previous page

Length of Lists

A user can select how many items will be shown in the list views per page. At the top of every list, a dropdown box allows the user to select how many items should be displayed from a list of system defined values. There is a default option displayed at the top of the list. If the default option is selected, the number of items displayed per page for the current tool will be as defined in the registry for that tool in the “entries” sub key for that tool.



Picture 24: Length of list selection

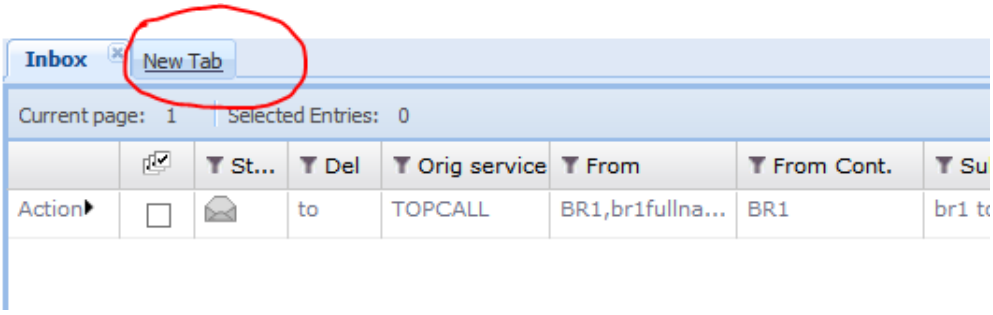
If a user selects another value from the dropdown list, the list will be immediately re-rendered and the user is presented with the beginning of the list. The value selected by the user will be saved. This value will be used in all tools, and remembered when the user logs out and logs in again.

Note To enable this feature, see *“TC/WEB Installation Manual.”*

Additional Tabs

A user can add multiple tabs for Inbox, Outbox and Archive messages. Additional tabs can assist in creating different filter settings for different tabs. Once the filters are saved for a tab, user can select a tab and see the desired result without applying filters.

To create a new tab, click the **New Tab** button. A window is displayed for providing the name for the tab. Specify the desired name and click **OK**. Newly added tab will be displayed along with the existing tabs.

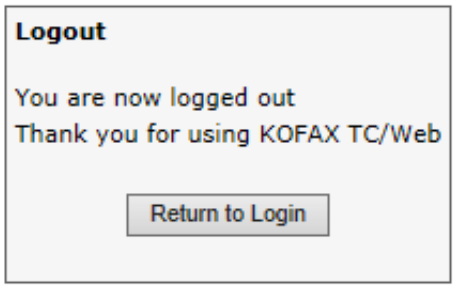


Picture 25: Length of list selection

The number of filter value is configurable. You can configure this this value in registry key **MaxTabCount**. Minimum value is one and maximum value is 20. Default is 10.

Logout

When you finish using TC/Web, click **Logout** to close the user session and display the Logout screen.



Picture 26: Logout screen

Opening Messages

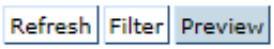
There are six tools that provide access to messages; Inbox, Outbox, Archive, Public, Private and System. End-users generally only need the Inbox, Outbox and Archive tools.

These message tools (sometimes called folders) have some additional functionality: a preview feature.

Preview

The **Preview** button enables or disables the preview pane for the current folder view.

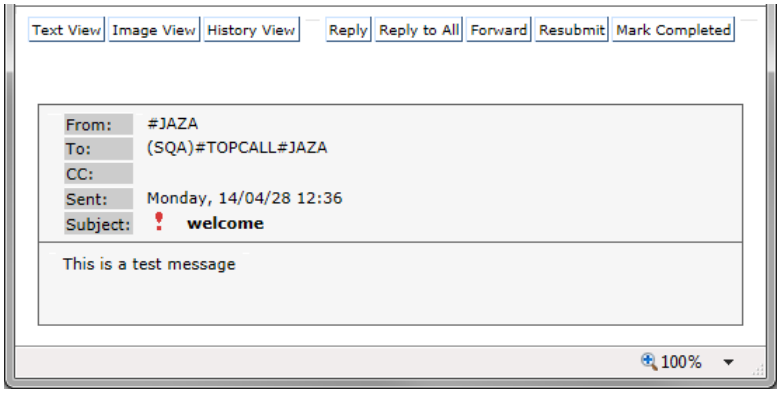
The preview status for each tool is saved in the users profile and will be used the next time the user accesses this tool.



Picture 27. Preview button

Note The list is refreshed on opening or closing the preview pane. Therefore, any check boxes that are checked will be cleared if the user toggles the preview panel.

By clicking to a line in the list, the message is opened. Depending on the preview status, the message is opened in a new window, or it is shown in the preview pane.

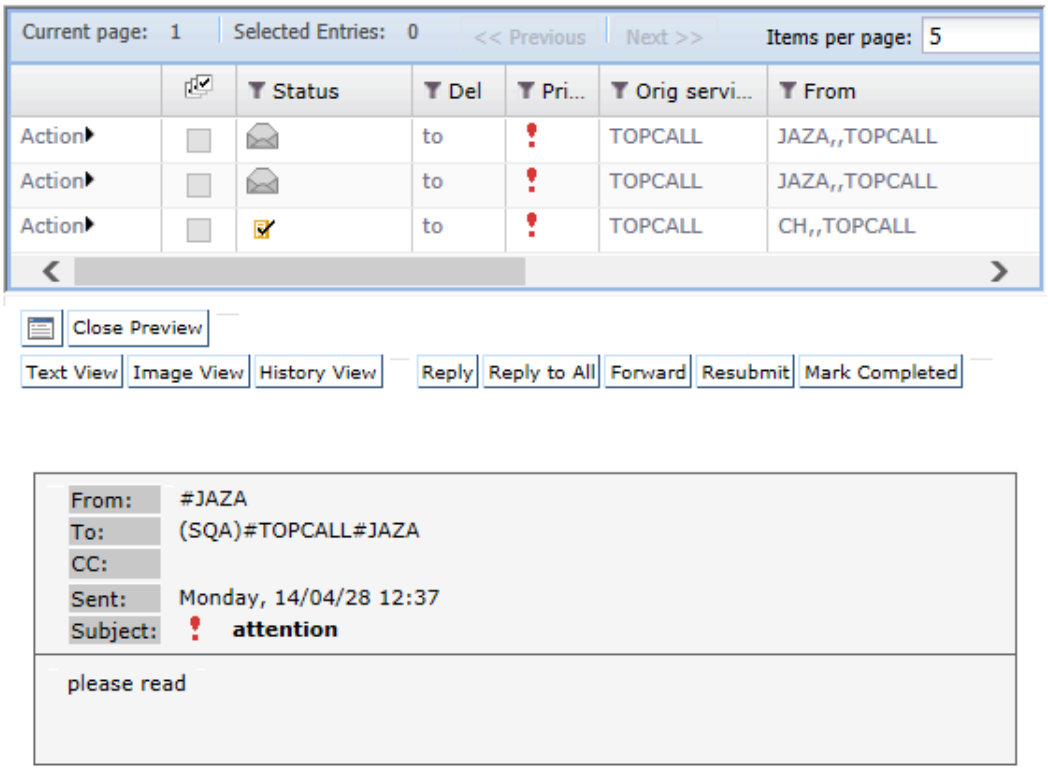


Picture 28: External browser windows

If the preview panel is enabled for a tool, the message will not be opened in a new window but in the preview panel, located below the list.

There is always the possibility to open a message in a new browser window by clicking on the "open in new window" icon.

This icon will only be visible if the preview mode is enabled. By default, messages are always opened in a new window.



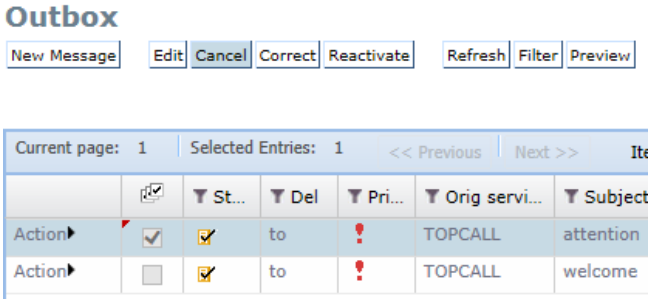
Picture 29: Preview pane activated

Outbox Actions

This section describes the Outbox actions.

Cancel

If the user wants to cancel one or more outgoing messages he simply has to select them in the outbox folder view and click the **Cancel** button.



Picture 30: Cancel button

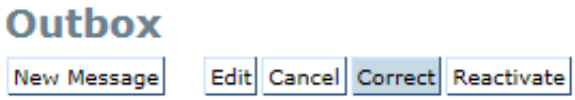
If possible, the messages will be canceled. A message that has been cancelled will not be sent.

The message will not be terminated. Whether the message moves into the Short Term Archive depends on the termination settings of the source of the message. (LINK, TCfW,…)

Note Multiple selection is possible.

Correct

The user can edit the recipients of a message by selecting a message and clicking the **Correct** button.



Picture 31: Correct button

Note

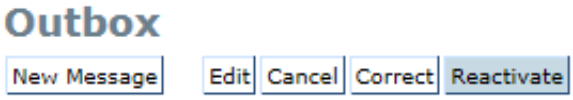
- Only the first selected message will be corrected.
- Directory lookup is not supported in the Correct tool in TC/Web.
- Sending to user groups or distribution lists is not supported.
- The logged in user (the originator) can always correct his own messages without any user rights being granted to him (there is no dedicated user right in KCS for correction of own messages.)
- The user is able to correct messages from other originators of the same group, if either "Correct Group Members" or "All user Correct" right is granted.
- The originator is able to correct message of all other originators, if the "All user Correct" right is granted.
- If message originator attempts to correct a request sent to authorizer (but authorizer is not authorized so far) it is possible to correct all recipients and also authorizers, given that the originator has show and edit authorizer right configured.
- After the authorizer has authorized the message, the originator looks for the send order to the fax recipient in his outbox, and may correct it, but the message must go to the authorizer first:
-
  - If one of the recipients being corrected require authorization, the authorizer is taken from the originator’s template automatically (if a template is defined for the originator and has an authorizer defined.)
  - If there are no authorizers in the template, the original authorizer of the message is used again.
  - If the originator is allowed to edit the authorizer, he would see the Auth field with the prepared authorizer and would be even able to change it manually.

Picture 32: Changing the recipient

Reactivate

Sometimes messages cannot be sent successfully. For example, a fax cannot be sent if the receiving fax machine is not on.

The KCS system tries resending these messages with increasing time between the retries. After the last unsuccessful retry the message will be marked as a "problem" and will not be sent.



Picture 33: Reactivate button

The user can select one or more messages in a tool and click **Reactivate**. Now the retries counter of the KCS system is reset and new send attempts will be initiated.

This option is available for all messages that have not been successfully sent except those currently being sent.

Note Multiple selection works.

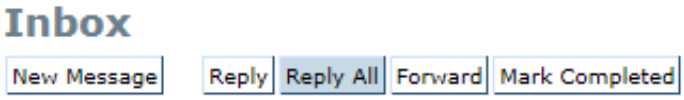
Inbox Actions

For the Inbox folder, a special functionality is available:

Reply / Reply All

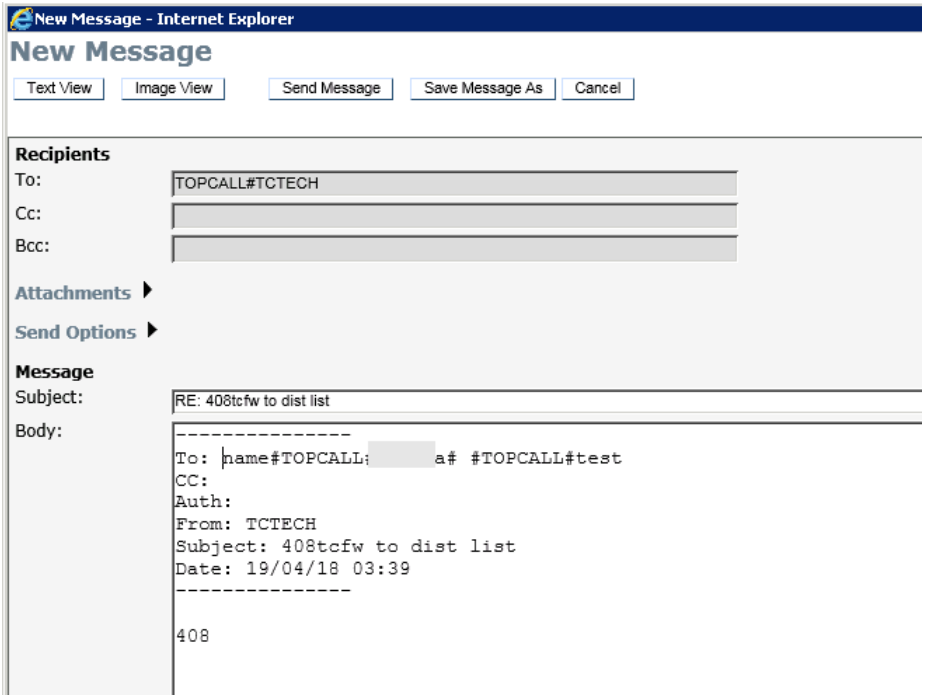
In the Inbox the user has the possibility to Reply and Reply All.

The **Reply** and **Reply All** buttons open a compose window where the original message is included as text. Attachments are removed.



Picture 34: Reply / Reply All buttons

The original recipient information (recipient, originator, time, …) is added to the message.



Picture 35: Reply / Reply All window

Note Only the first selected message will be replied to.

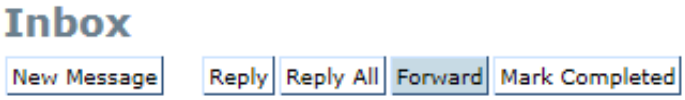
Forward

Each message tool has a button to forward the selected message.

Click **Forward** to open a new message window where the original message is included as text.

Attachments of the forwarded message are added to the attachment list.

The original recipient information (recipient, originator, time, …) is added to the message

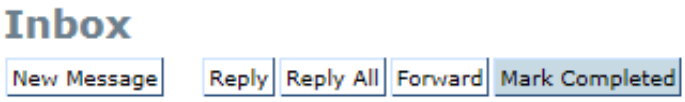


Picture 36: Forward button

Note Only the first selected message is forwarded.

Mark Completed

Click **Mark Completed** to mark all selected messages completed, i.e. they are terminated positively. Depending on the termination settings of the source of the message (LINK, TCfW,…), the message might be moved into the short time archive.

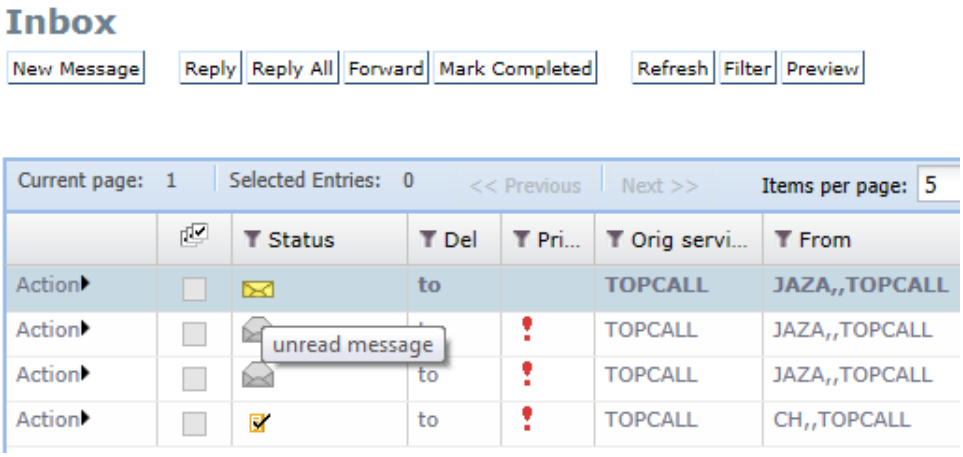


Picture 37: Mark Completed button

Note Multiple selection works.

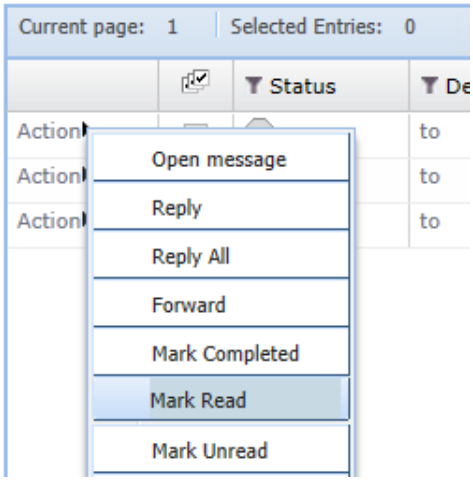
Mark Message as Read/Unread

The user can change the status of all messages in the inbox so that they appear in the message list as read or unread.



Picture 38: Inbox view with unread message

Click **Mark Read** on the Action menu to mark a message as read.



Picture 39: Action menu with selected option 'Mark Read'

Click **Mark Unread** on the Action menu to mark a message unread.

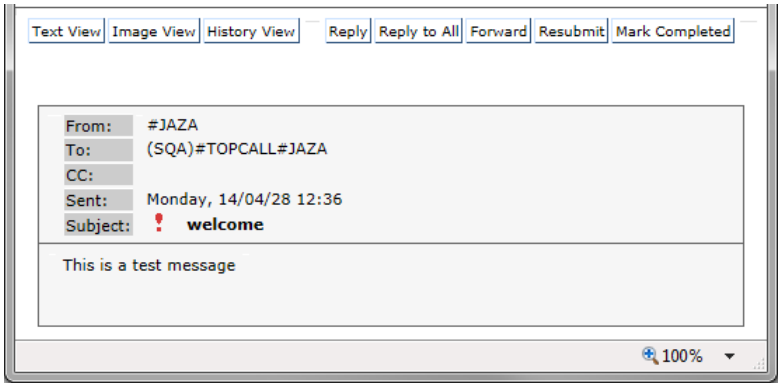
Explanation of Icons

Inbox:	Outbox:
unread message/	waiting
locked unread message	waiting locked
read message	sent OK
deleted message	cancelled
message sent with high priority	problems
message sent with low priority	sending
New (with reception error)	sending locked
Read (with reception error)	active
Completed (with Reception error)	active locked

Number locking means that out of two or more send orders to the same telephone number only one can be active at any time.

If the priority of a message is not "normal", an icon representing the priority will be displayed before the subject in the Message view.

Message priorities High1-High10 can be configured to be displayed wherever the priority icons are displayed. Next to the red exclamation mark icon, a number between 1 and 10 is drawn for priorities High1 to High10.



Picture 40: Priority of the message

Each message entry in the Inbox has one of the following status:

Status icon	Meaning	Description
	unread messages	No action has been performed. The message has yet to be printed or viewed.
	locked unread message	Number locking feature is active for this channel.
	read message	Message already opened. It has been printed or viewed. You can mark the entry as completed now.
	deleted message	Only the log entry of the message exists; the message itself has been deleted
	message sent with high priority	Messages that are sent with high priority.
	message sent with low priority	Messages that are sent with low priority.
	New (with reception error)	New messages having reception error from mail system.
	Read (with reception error)	Read messages having reception error from mail system.
	Completed (with Reception error)	Completed messages having reception error from short term archive.

You can filter messages using the following statuses:

Filter name	Description
New and read	Shows all messages that are new and already read.
Only new	Shows all messages that are new.
All	Shows all messages in inbox.

Filter name	Description
New (with reception error)	Shows all new messages having reception error from mail system.
Read (with reception error)	Shows all read messages having reception error from mail system.
Completed (with Reception error)	Shows all completed messages having reception error from short term archive.

Message View

This section describes the message view.

General

The message view is used to show any message in TC/Web no matter what tool it might have been opened from. The view provides many of the same actions that are available from the message list tools, Reply, Reply to all, Forward, Mark Completed.

The message view is also used in the Metamail product to provide access to attachments stored on the server such as Fax or Voicemail.

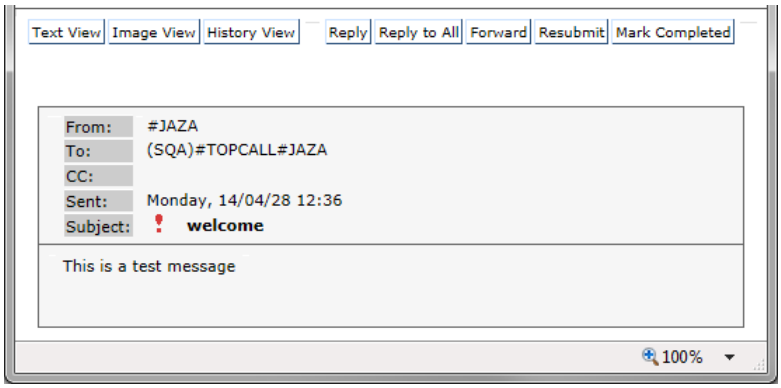
Up to four buttons at the top of the message view allow the user to see different views of the message:

- Text View
- Image View
- History View
- Attachments

  The user can configure the default view in the **Options** > **Settings** tool.

Text View

The **Text view** is the standard message view. It displays the message header followed by the message attachments.



Picture 41. Text view

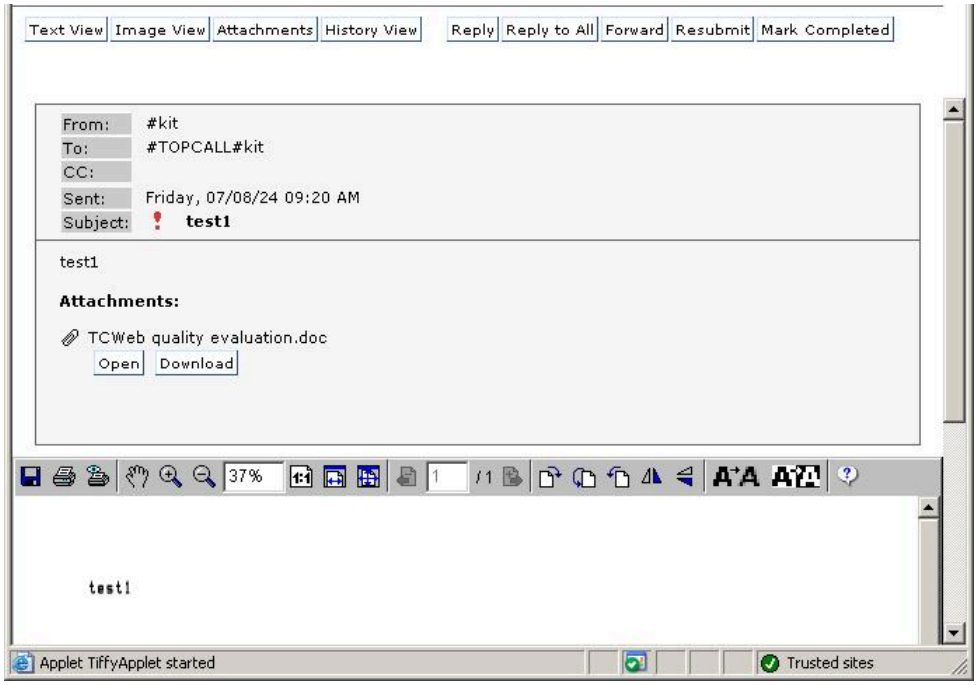
- Message header (From, To, CC, Sent time, Subject)
- Text content of message

- Attached files as plain text
- Attached html files as formatted text
- List of attachments

Note If opened in a new browser window, the text portion of a message can be printed with standard browser functionality.

Printing using the browser functionality is not logged.

The **Text view** can also contain the image viewer. This feature must be configured by the system administrator. If Dual View is enabled <Image> link is not displayed in Text view.



Picture 42. Text view with image viewer

Image View

In the **Image view** the content of the message will be displayed in image format.

Image content (Fax data) and text content (not attached text files) is converted to an image and displayed in a special viewer.

The viewer provides the following functionality:

- Save / Download the image file (FAX) to the local hard disk.
- Print current page to local printer.
- Resize the image.
- Flip / Rotate the image.

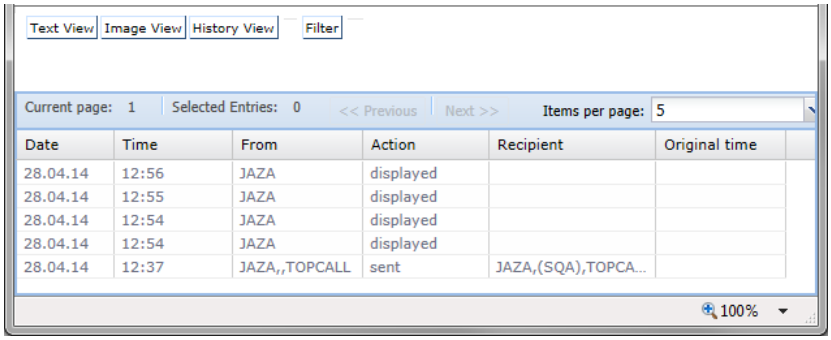
- Navigate image, a small window of the page appears where you can choose which part of the image should be shown on screen.

Picture 43. Image view

Note Save / Download and Print of image files (FAX) is logged. See “History View” for detailed information.

History View

The **History view** displays the history of the message.



Picture 44. History view

The following actions are logged to the message history:

- **Sent**: Each time a message was sent within the KCS system.
- **Split**: In TCfW it is possible to split and distribute incoming faxes.
- **Saved**: Download messages using the image viewer in TC/Web Access.
- **Printed**: Print messages using the image viewer in TC/Web Access.
- **Displayed**: Each time the message is displayed using TC/Web Access.
- **Attachment**: Each time an attachment in the message is opened by the user

Additionally, TC/Web can display log entries, which were created by TCOSS. The following actions are supported:

- **Open**: Message is opened from the mail system (open mail entries, not short-term archive)

- **Reactivate**: Mail entry is reactivated
- **Priority**: Priority of mail entry is changed
- **Update**: Mail entry update other than reactivate or priority change
- **Cancel**: Mail entry is cancelled
- **Reject**: Mail entry is rejected
- **Terminate**: Negative termination of mail entry other than cancel or reject
- **Complete**: Positive termination of mail entry
- **Distribute**: Message distributed
- **Return**: Message rejected and returned to sender
- **Correct**: Recipient corrected

  Every history entry displays what kind of action was performed, by whom, and when.

  For the **Sent** action, information about the recipient is available.

  For the **Split** action, the reception time of the original message is displayed.

Note

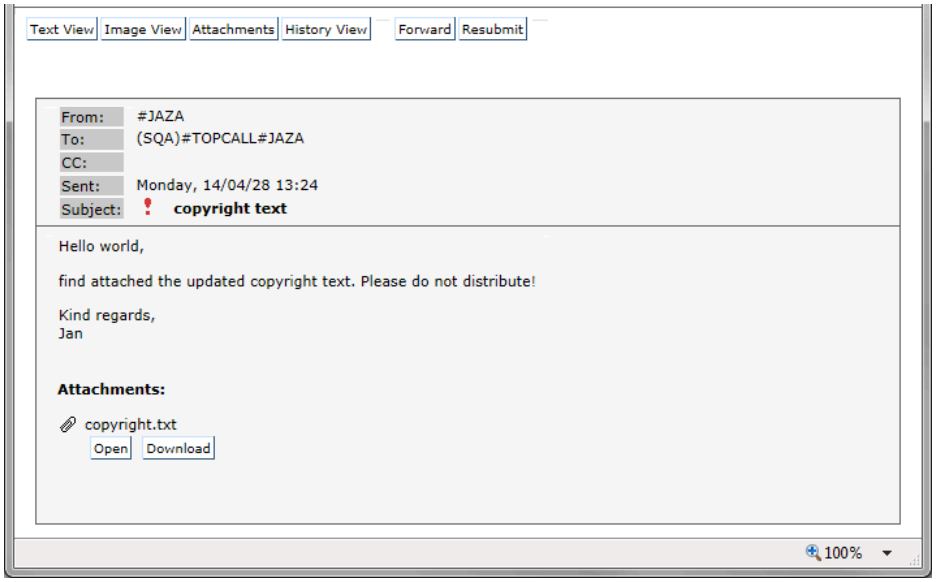
- There is no possibility to filter for a certain user.
- The system is configured to display up to a certain number of the most recent actions.
- Because the information is coming from the archive, there can be a delay before the most recent actions are displayed.

Attachments

If a message has attachments, they are listed after the text of a message.

Click Attachments to display a message in text view and scroll down to the attachments section. This can be helpful in the situation of a long text message.

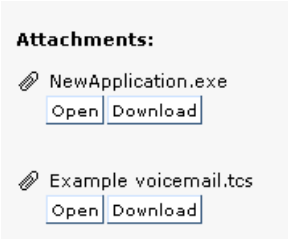
The Attachments button is only displayed if a message has attachments.



Picture 45. Attachments view

Every attachment contains two actions:

- **Open** – The web browser opens a new window and attempts to open the file in it. Exact behavior depends on the configuration of the client browser.
- **Download** – The web browser will present a dialog box allowing the user to download the file to the computer.



Picture 46: Attachments

If it is configured by the Administrator, TC/Web can open the first attachment in a new window automatically.

Note For details on how to configure this feature see “TC/Web Installation and Configuration” manual.

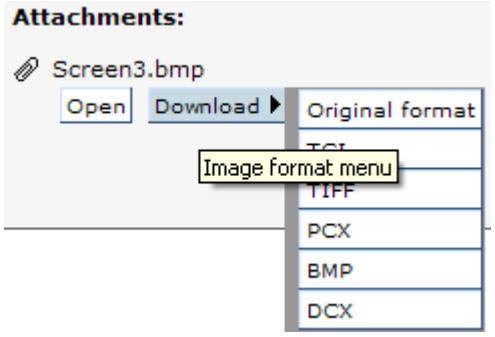
Saving Image Attachments to Different Formats

You can convert an attachment to a selected output format and to save it to a local directory.

If the message contains a graphical attachment, you can select in the **Message view** the format in which the attachment is downloaded.

Click **Download** to expand a list of supported formats.

Select one of the supported image formats. The image is converted and then downloaded.



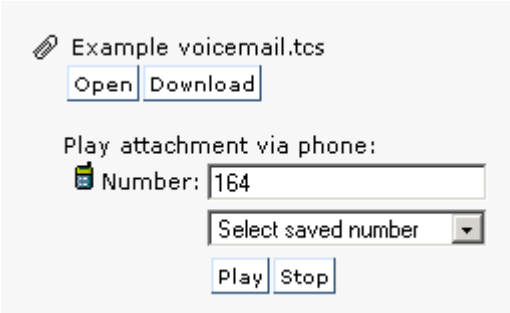
Picture 47: Supported image formats list

Voicemail Player

Like other attachments, voicemail or sound attachments can also be opened or downloaded to the computer.

TC/Web is also able to play voice attachments directly to a telephone. Enter a phone number click Play.

A dropdown menu allows the user to pick from up to three saved numbers.

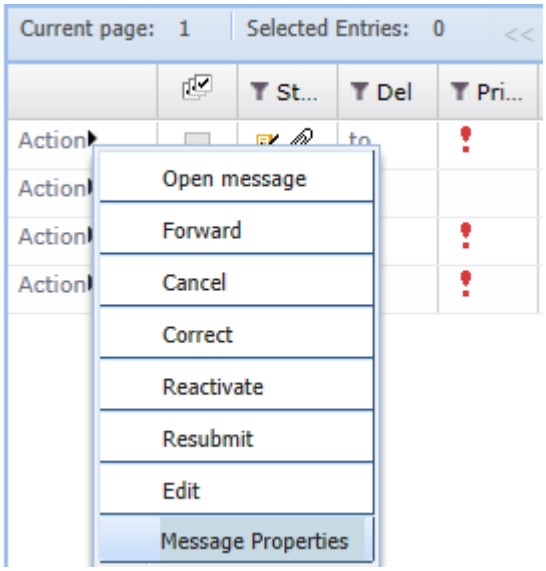


Picture 48: Voicemail player

Phone numbers can be saved by the user in the **Options** > **Settings** tool.

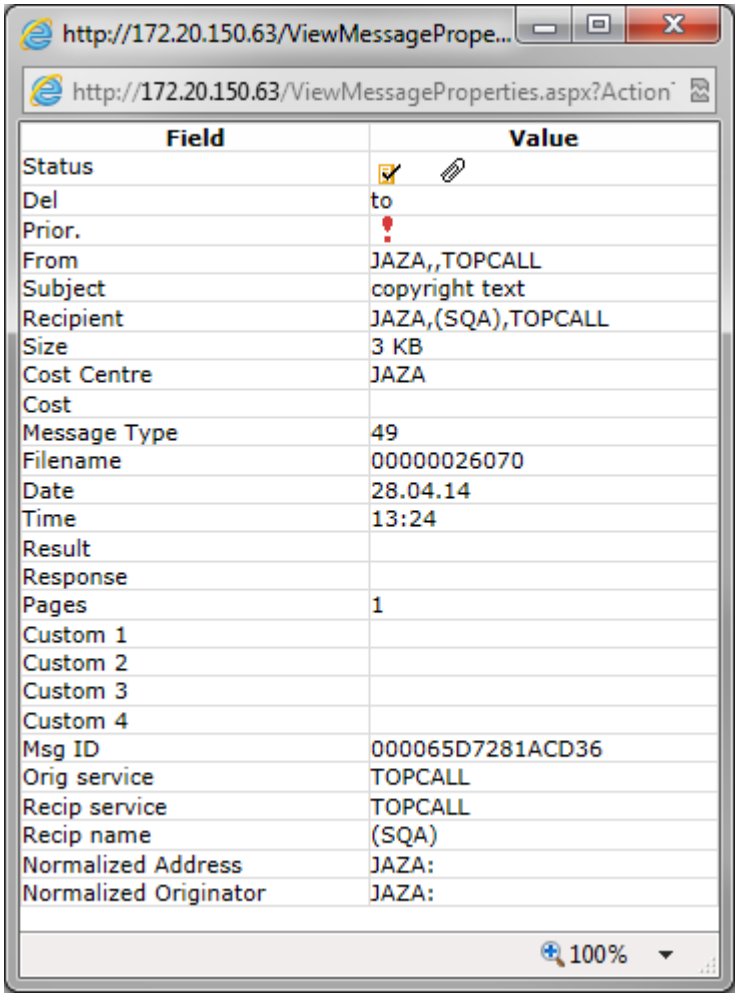
Message Properties

Click **Message Properties** on the Action menu to display all message fields. This function is available for Inbox, Outbox, Public Folder, Private Folder, and Archive.



Picture 49. Message Properties Action

The Message Properties view displays two columns. First column contains field names, second one field values.



Field	Value
Status	
Del	to
Prior.	
From	JAZA,,TOPCALL
Subject	copyright text
Recipient	JAZA,(SQA),TOPCALL
Size	3 KB
Cost Centre	JAZA
Cost	
Message Type	49
Filename	00000026070
Date	28.04.14
Time	13:24
Result	
Response	
Pages	1
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Msg ID	000065D7281ACD36
Orig service	TOPCALL
Recip service	TOPCALL
Recip name	(SQA)
Normalized Address	JAZA:
Normalized Originator	JAZA:

Picture 50. Message Properties

Note Message Properties View shows only fields which are defined in TC/WEB, not all TCOSS fields. Display fields do not depend on registry settings.

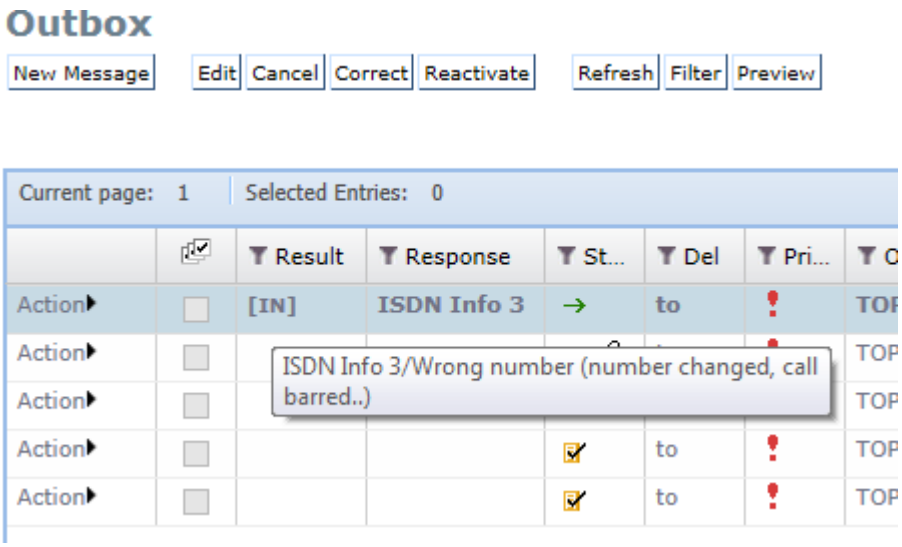
Outbox

This section describes the Outbox.

Long Text for Error Codes

The Result column in the Outbox view displays the two letter Kofax Communication Server error codes when there is a problem. Hover the mouse pointer over the two letter code to show a short description of the error code in a tool tip. The tool tip also shows the contents of the Response column, if this is different than the error code description.

In order to view Response and Error columns, they must be enabled by the system administrator.



Picture 51: Result / Response columns

Whenever a two-digit error code is displayed, users have the possibility to click to the error code. A new window with an exact error description opens. Due to the fact that the detailed error description might depend on the customer installation, the error description file is not supplied with the installation. The error descriptions file opens in new popup windows. When the error description file opens, it automatically jumps to the corresponding error description via the error code bookmarks.

Output Outbox as Text File

If enabled in the configuration, TC/Web can export the entire Outbox as text file. To use this feature, click Export in the Outbox view.

Picture 52: Export button

TC/Web generates a text file which you can download. The text file contains all available fields for the Outbox view, not just the fields configured to be visible. It also contains all records from view, not only the visible ones. If the view is filtered, only the filtered data is exported (all records, not only visible). Because the Outbox can hold a large number of records, a time limit exists for the export processing. If the time to export all of the filtered records exceeds the time limit, the export stops and the user receives a file with the records that were exported plus a message at the bottom indicating that the export was not completed.

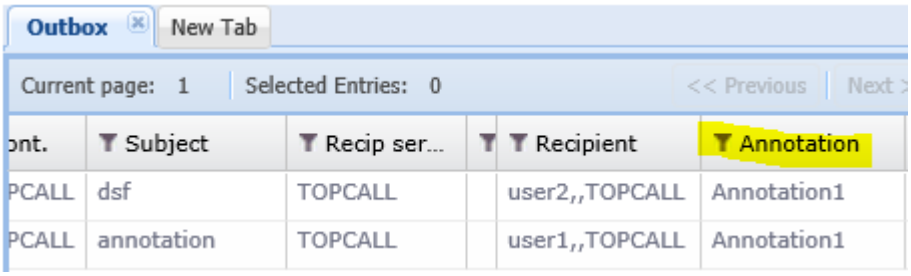
Annotation

The annotation feature in TC/Web allows user to assign additional predefined annotation/states to the terminated messages in Outbox. This feature can provide additional user specific information about the terminated message.

To make use of the annotation feature, context specific buttons needs to be configured to set particular annotation values. For example, user can define annotations like “Not Verified”, “Verified Manually” and so forth. User can set the annotation as “Verified Manually” to messages in outbox which has been manually verified and sent by the TC/Web user. The number of annotations depends on the number of configured context buttons, as there is always a specific button for each annotation value. For example, for two annotations mentioned above (“Not Verified”, “Verified Manually”) user will configure two context buttons, one to set Not Verified, and one to set Verified manually. If user needs 16 different annotations/states, 16 buttons must be configured.

There are eight pre-reserved text positions for annotations in the language file, which could be used to define different annotations. User can define the desired annotation texts (maximum eight) in the language file at these positions. If a user need more annotations, he can specify the required UI texts in config.xml.

If enabled in the configuration, additional column for Annotation is displayed in Outbox. This column will contain the default annotation value for the message.

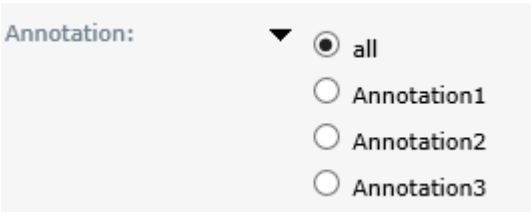


Picture 53: Annotation Column

To change default value, user can right-click on a message in TC/Web and select the desired annotation for a message from the configurable context buttons. All the available annotations except the one which is currently set will be displayed in the context menu.

For information about how to configure annotation, refer to the *“TC/Web Installation Manual”.*

If the annotations column is configured, the Annotations filter radio-box is displayed along with all other filters. It is possible to filter for any combinations of one annotation and any other of the filters. If the Annotation column is not configured, then Annotation filter is also not displayed.



Picture 54: Annotation Filters

Status

Each message entry in the Outbox has one of the following status:

Status icon	Meaning	Description
	waiting	Message has arrived in the Outbox and Kofax Communication Server has yet to perform any sending attempts. In case of internal sending this status means that the message has not been touched yet.
	waiting locked	Message has arrived in the Outbox. Number locking is active for this channel. Since another message with the same telephone number is already active, this message is locked.
	sent OK	Message was sent successfully. This status appears only when the message was sent by applications other than TC/Web.
	cancelled	Message was cancelled by the user.
	problems	Messages that were marked completed due to send error.
	sending	Sending in progress. In case of internal sending this status does not exist.
	sending locked	Sending in progress. Number locking is active for this channel. Number locking means that out of two or more send orders to the same telephone number only one can be active at any time.
	active	Sending in progress. At least one sending attempt has been made. In case of internal sending this means that the message has been touched (viewed, printed, and copied).
	Send Attempt	A logged send attempt from the short-term archive. For example, for a fax line where the distant subscriber was busy or not reachable for some other reason are documented in the short term archive

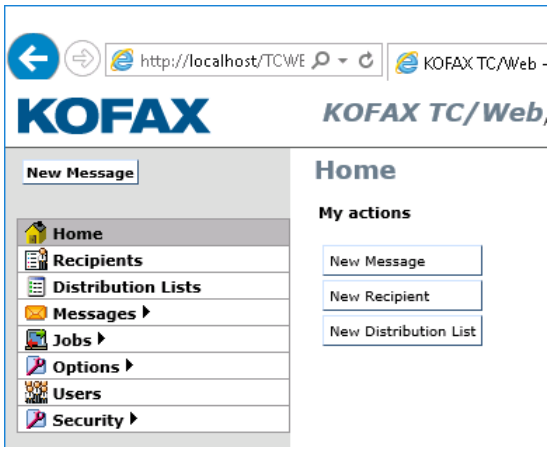
You can filter messages using the following statuses:

Filter name	Description
Not yet sent	Shows all messages that are not yet sent.
Problems	Shows all messages that were marked completed due to send error.
Cancelled	Shows all messages that were cancelled by the user.
All	Shows all messages in outbox.
All + Send attempts	Shows all messages and all send attempts.
All send attempts	Shows all send attempts.

Sending a Message

To create a new message, click **New Message** in any of the following locations:

- The Toolbar
- The Home tool
- The Inbox
- The Outbox



Picture 55: New Message buttons

New Message Tool

You can enter the recipient address(es) directly or use the address book tool.

Entering an address directly

TC/Web automatically recognizes email addresses by the @ symbol, and recognizes numbers with more than four digits as fax addresses.

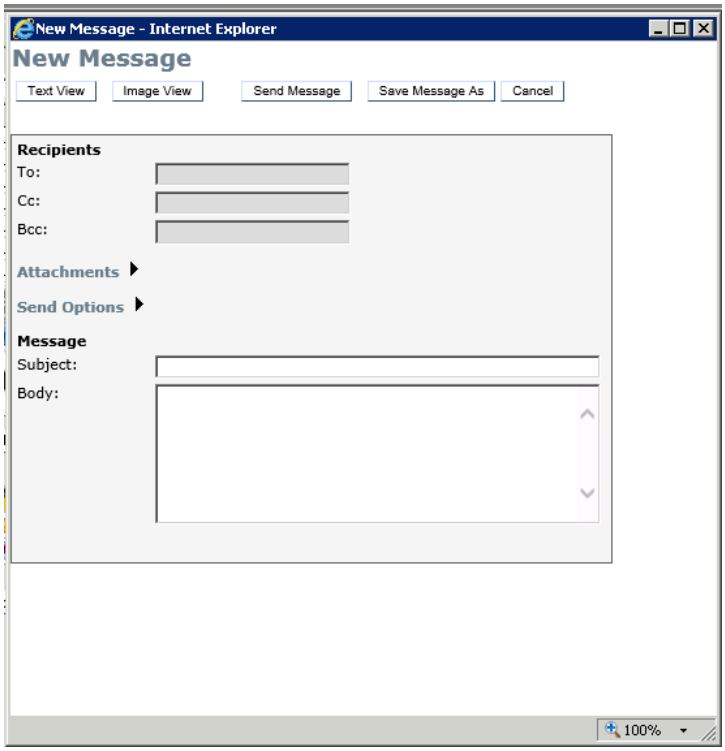
To use a different kind of service, addresses are formatted as:

```
service_name#address
```

Address examples

- E-mail – janel@companyname.com
- Fax - 3334445678
- SMS – SMS#4446661234
- Voice – VOICE#6667772345

  (These service names are just examples.)



Picture 56: New Message window

To send to another Kofax Communication Server user, the TOPCALL service can be used:

```
TOPCALL#userid
```

To send to a distribution list, both the address book name and the distribution list name must be entered, separated by a “|”:

```
Addressbook_name|DistributionList_name
```

Example:

```
GroupBook|PressReleaseList
```

Addresses can be separated by semicolon (;) or comma (,). This is different from TCfW, where comma is used as a separator between service name and address.

Note

- Special characters such as “@” or “,” should not be used in user names.
- The maximum supported number of recipients of each type is 200. A message can be sent to 200 TO, 200 CC and 200 BCC recipients. Therefore it is recommended to keep the number of recipients in a distribution list under this size. To send to more recipients at once (up to 30,000) please use TC/Broadcast.
- It is not possible to directly enter a stored recipient name. Recipients can be selected by using the address book tool.

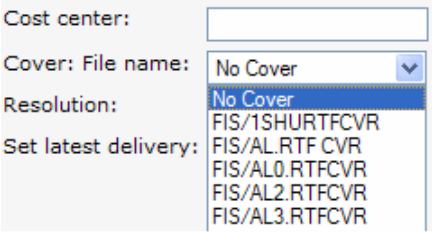
Preview Option for Fax Messages

For fax messages, selecting the **Image View** button displays the content of the message in image format. This is the format in which the fax message will be displayed to the fax receiver. You can:

- Save / Download the image file (FAX) to the local hard disk.
- Print current page to local printer.
- Resize the image.
- Flip / Rotate the image.

Cover Page Selection

When creating a new message, you can select a desired cover page from a dropdown list box. It contains cover pages for the current user and cover pages from 'FIS Folder'. By default it is set according to the cover page specified in the default template for this user. If you do not want a cover page for the message, select **No Cover**.



Picture 57: Cover page selection

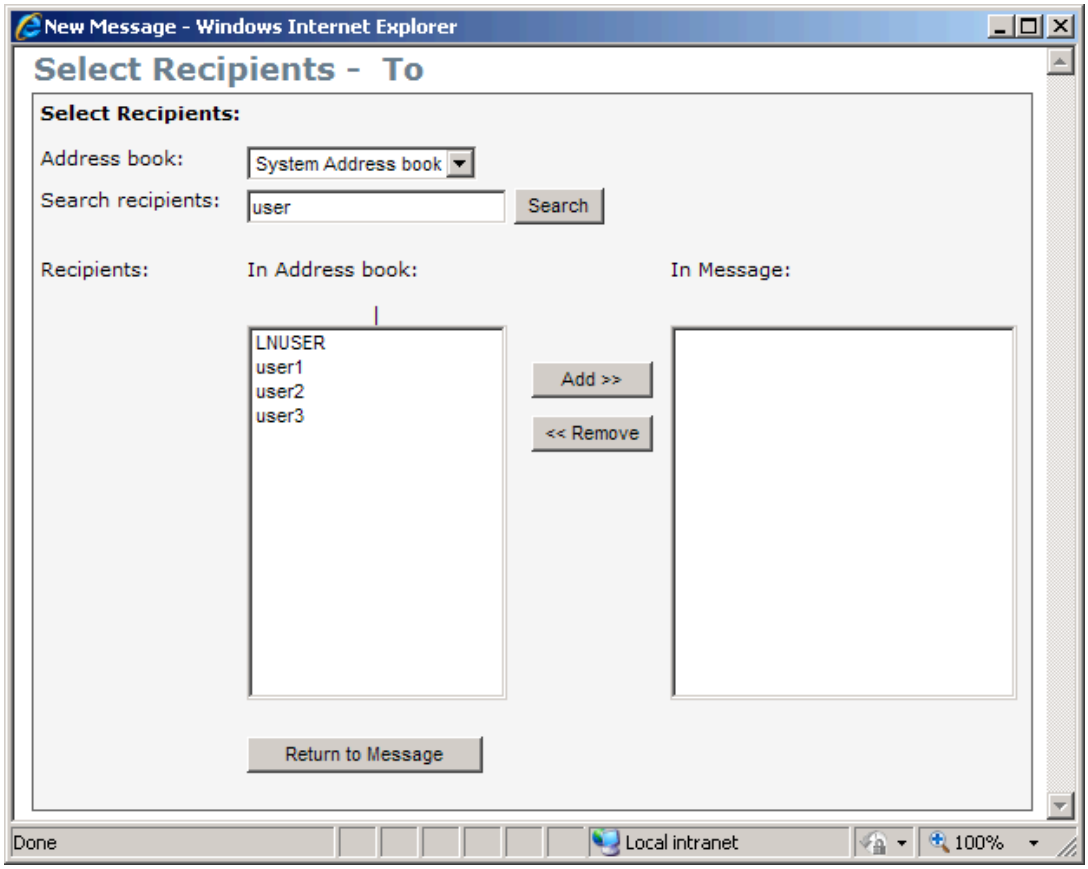
Address Book Tool

To access the address book tool, click **To**, **Cc**, or **Bcc**.

In the address book tool, a recipient can be easily found by entering a part of the recipient ID in the Filter field.

It is not possible to filter on services like FAX or VOICE.

Select a recipient and click **Add**.

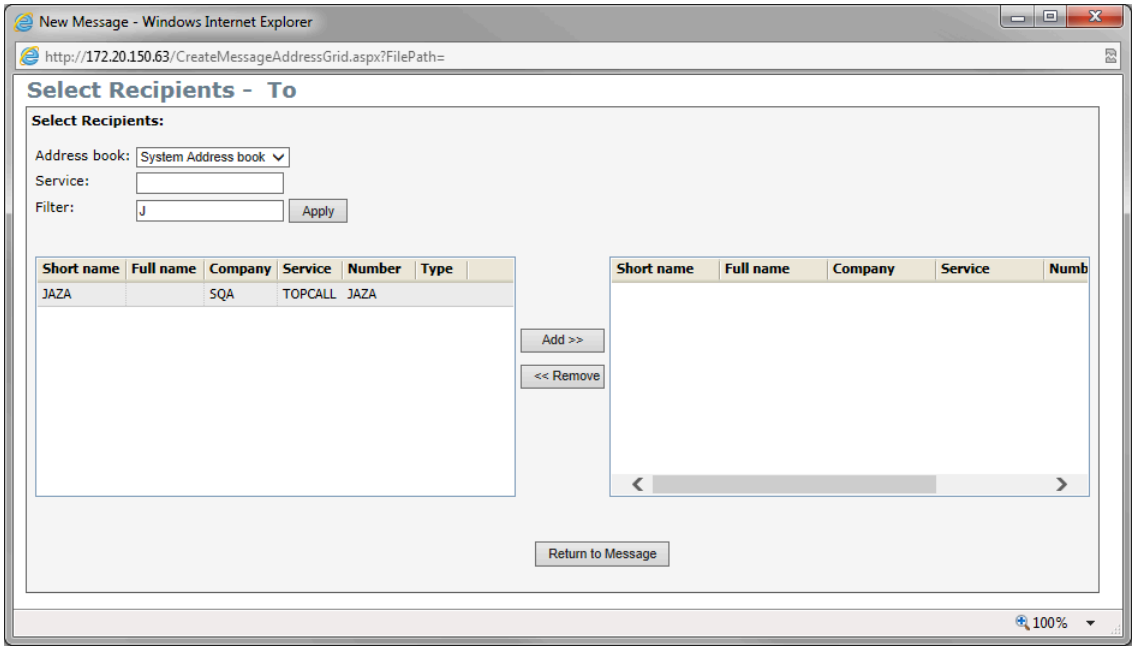


Picture 58: Selecting the recipients

Note You can select multiple recipients by holding the Shift or CTRL key.

If configured, TC/Web can use another address book tool which contains grids. Single recipients or entire distribution lists can be added to the message by selecting the recipient in the address book and double-clicking; or by clicking the **Add** button.

In this address book tool, a recipient (or authorizer) can be easily found by entering a starting part (prefix) of the recipient ID, Full name, Company or Number in the Filter field. Additionally, this filter can be AND coupled with the Service which filters out only recipients with the particular service (e.g. FAX)



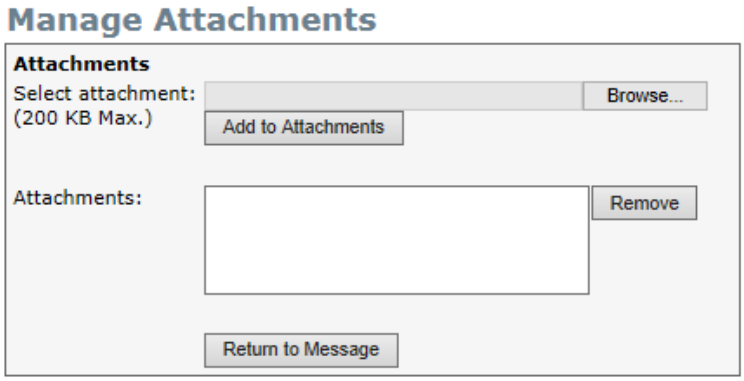
Picture 59: Selecting the recipients

Note

- You can select multiple recipients by holding the CTRL key.
- For detailed information on how to configure the address book tool, please refer to “TC/Web Installation Manual”.

Manage Attachments

To attach files to a message you have to upload them to TC/Web via the **Manage Attachments** tool.



Picture 60: Manage Attachments

- In the New Message tool, click **Manage Attachments**.

- Click **Browse…**, and locate the file to upload.
- Click **Add to Attachments**.

  Note Many attachments can be added.

- Click **Return to Message**.

Voice Attachments

To attach a new voice file to a message you have to record a voice message through the **Record Voice Message** tool.

Picture 61: Record voice message tool

- In the New Message tool, click **Record Voice Message**.
- Enter your phone number and click **Dial Number**.
- After connecting, click the **Record** button and start your message.
- When you are finished, click **Stop**.
- By clicking **Add to Message**, the recorded voice message is added as attachment to the message; by clicking **Close window**, the recorded voice is deleted.

Send Options

By clicking Send Options, a drop-down dialog displays additional options to determine a message's parameters. New messages are using standard settings, which are applied with the user's default message template. Changing them in the template will change the defaults, so it is easy to modify them. The screen here displays the Send Options dialog box.

Picture 62: Send Options

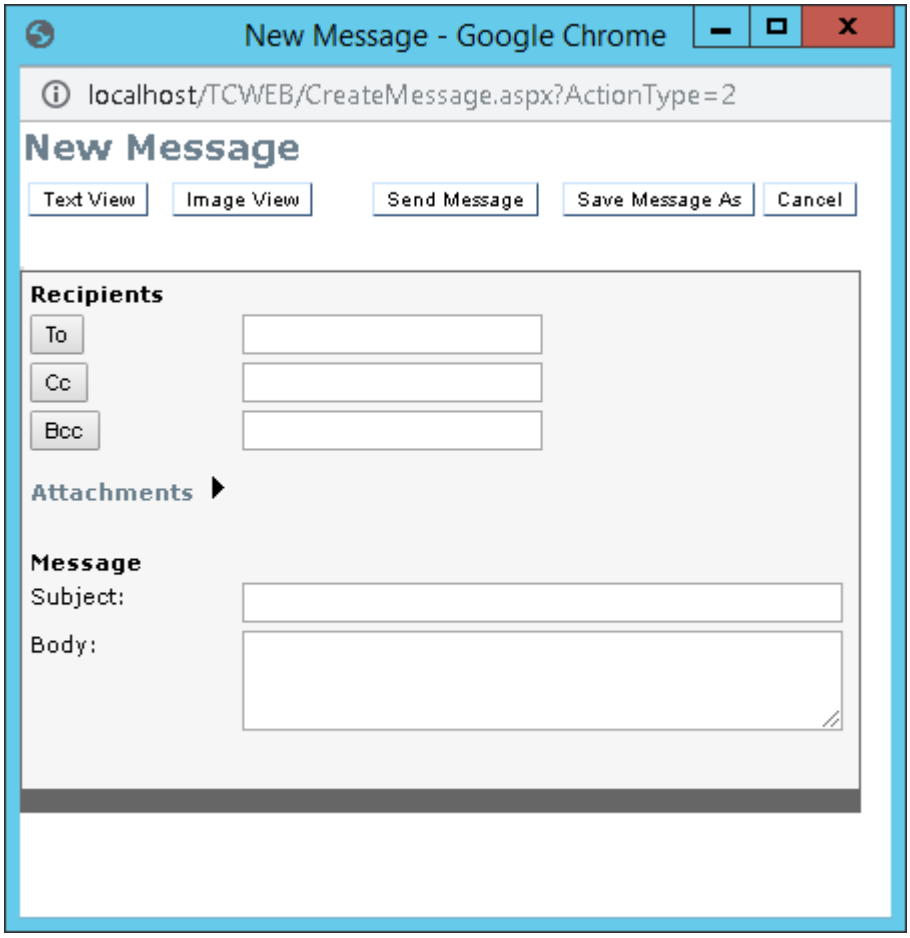
The standard default message template (shown in the user profile as “build-in default template used”) which is supplied to Kofax Communication Server products is using the following default settings:

- Priority: high
- Fax header line: on
- Notifications: failure

Hide Send Options

If required, Administrator can hide the Send Options of a message for some users. To hide the send options, set the value of following registry key to 0. (Default: 1)

```
HKLM\SOFTWARE\WOW6432Node\TOPCALL\TCWEB\SendFormOptionsEnable
```



Option Description

TO Priority, CC/BCC Priority

Select a priority level for all TO and CC/BCC recipients the message is being send to. The following values can be used: Low, Normal, High, High 1, High 2, High 3, High 4, High 5, High 6, High 7, High 8, High 9 or Highest. The **TO Priority** determines the priority for all TO recipients, the **CC/BCC Priority** for all CC/BCCs.

Notifications

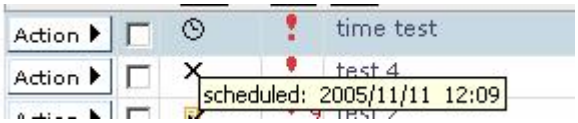
There are two types of notifications you can choose from: the delivery notification, triggered by successfully transmitting the message to the recipient, and the non-delivery notification triggered if the transmission failed for any reason. The drop-down list contains four values:

- **Success**: request delivery notification
- **Failure**: request a non-delivery notification
- **Always**: request both success and failure
- **Never**: do not notify

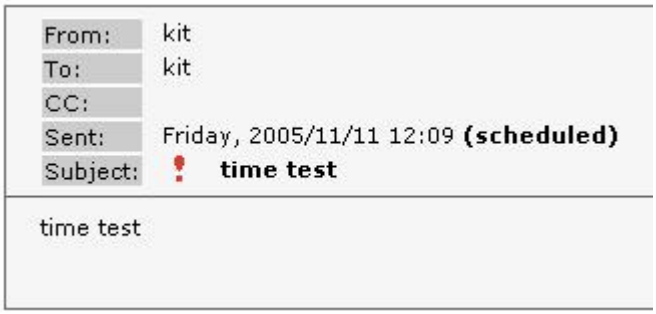
Send Date/Send Time

Specify a date and time at which the message is going to be sent. Unless you fill out these two fields, the message will be sent immediately.

If a message was set to be delivered at a specific time, the clock icon is displayed in the status field, and the delivery time is indicated in a tooltip.



Picture 63: Scheduled message



Picture 64: Scheduled message preview

Cost Center

By specifying a name or code in this field, you can locate the costs for transmissions to the appropriate cost center.

Cover File Name

Cover sheets are templates that are sent out with a message. They usually contain common text such as a company address, a logo, or any other headings. The drop-down list contains all cover sheets from the private and FIS folder. Your private folder name is represented by your own user name.

Resolution

You may set fax resolution to either High or Normal. High is slower and therefore more expensive, but it produces a clearer fax image.

Set Latest Delivery

Allows you to enter the latest possible time a message is going to be sent. This is useful if you need to send a fax to someone by a certain time and it is getting pointless if it arrives after this time.

Fax Header Line

Used to activate header line in faxes.

Registered Message

Sending a registered message will create a message with an active forwarded state in your outbox until the recipient opens the message. Afterwards you are notified, as the message will change its state to “Send OK”.

Hide Send Options

For some users, Administrators can hide the Send Options so that they cannot change message settings, such as, change cover sheets. To hide the Send Options, do the following:

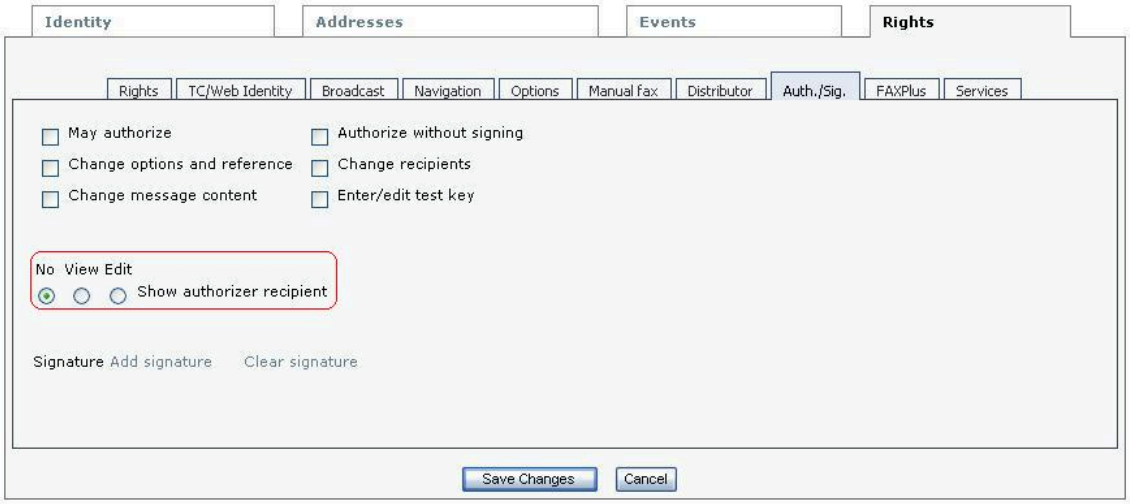
1. Set the value of following registry key to 0. (Default:1)

   `HKLM\SOFTWARE\WOW6432Node\TOPCALL\TCWEB\SendFormOptionsEnable`
2. Run the IIS reset command.

Sending a Message for Authorization

Some users do not have the right to send out certain messages without authorization.

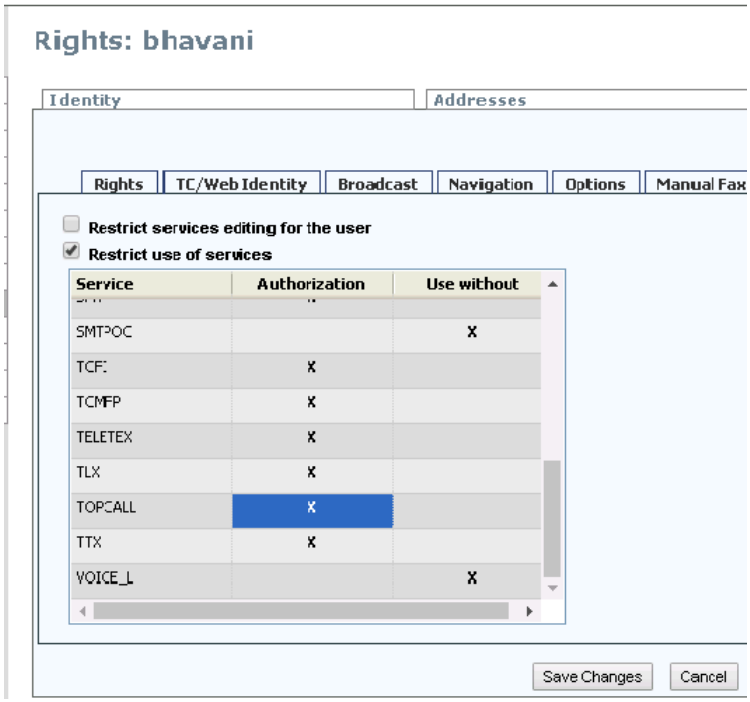
If a user does not have the right to send certain messages directly, in addition to the final recipient in the To field, he also needs to specify an authorizer in the Auth field. The message will then be relayed to the authorizer.



Picture 65: User profile authorizer options

This means that before a message can be sent, it first has to be authorized by someone. If a message is sent to a user without authorization rights, this user checks whether it has TOPCALL Service restricted/not

in the "Restricted use of services" tab (picture XYZ1). If it not restricted, then only it can be able to reject the message, else the message cannot be rejected.



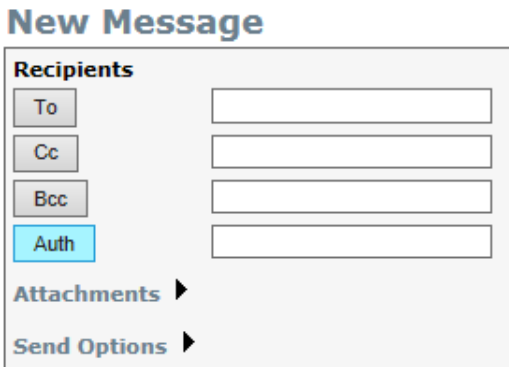
Picture XYZ1: Restrict use of services

The User Rights at Auth./Sig. tab has a Show authorizer recipient option. Depending on this option, the user can view or change the authorizer.

- If the selected option is No, the user will not have the option to view or change an authorizer.
- If the selected option is View, the user will be able to view the authorizer, but not to change it.
- If the selected option is Edit, the user will be able to edit the authorizer.

  The authorizer can be entered manually or selected from the address book. Only users with “TOPCALL” service are listed in the address book.

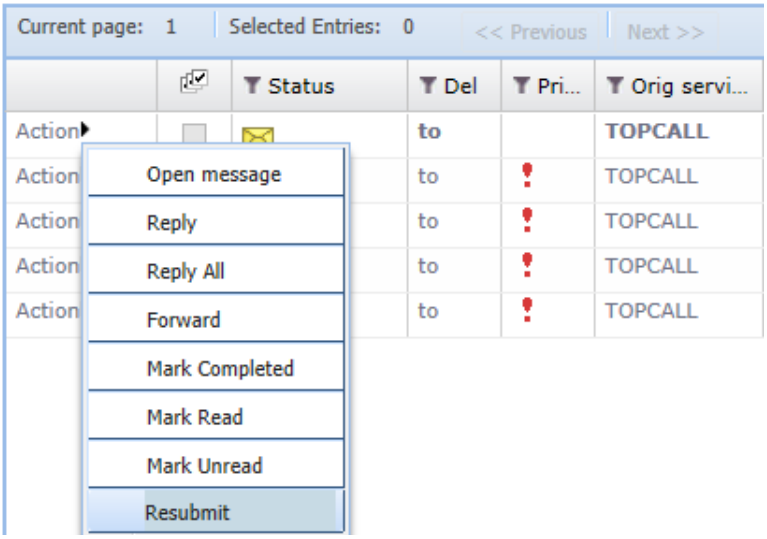
If a user is not equipped with the rights to change the authorizer, it must be defined in the default template of this user; otherwise, the message will not be sent.



Picture 66: Send Message – edit authorizer

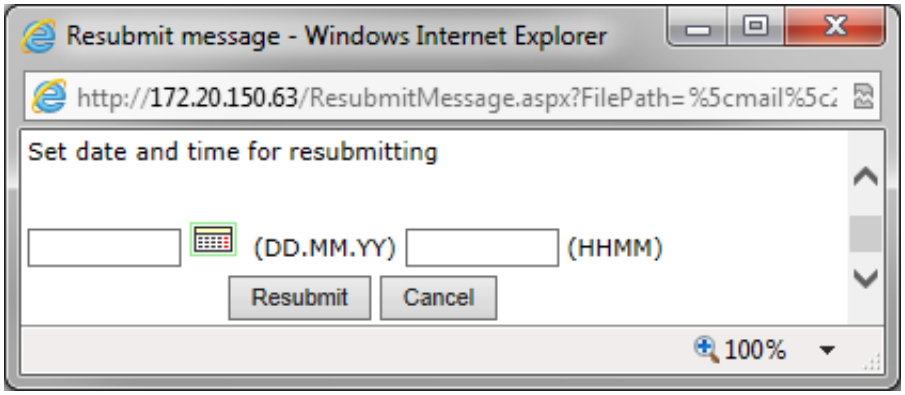
Resubmit a Message

This command resends a message with a specified time delay. The ‘Resubmit’ command is available for new, read and terminated messages (Inbox and Outbox).



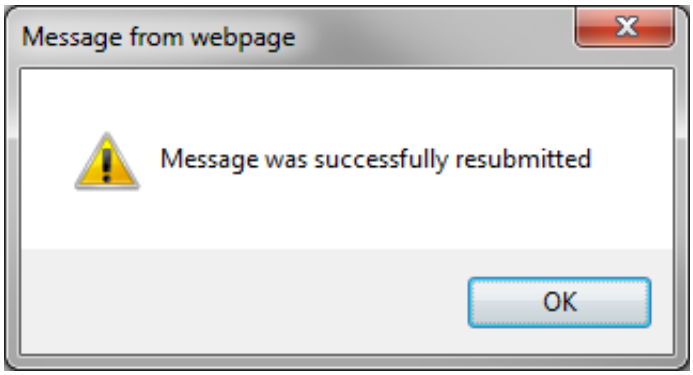
Picture 67: Resubmit command in Action menu

To resubmit a message, select Resubmit in the Action menu of a message. A new window will display, where you specify the time and date for the message to be resubmitted.



Picture 68: Resubmit window

After providing the necessary data, click Resubmit. If the message is resubmitted successfully, a confirmation message is displayed.



Picture 69: Confirmation message

Send Confirmation for Previously Sent Message

This command sends a confirmation message of previously sent messages. These confirmation messages include the original message as well as information about the original send order.

The Send Confirmation command is available for messages in Outbox and Archive.

To send a confirmation message, the user needs to click the Send Confirmation button or select the command in the Action menu.

The “New Message” window appears. The recipient and subject fields are automatically populated (configurable). The message is available in Text View and Image View.

The Send confirmation feature has to be enabled in configuration.

Note Messages from both Inbox and Outbox can end up in the Archive. The Send Confirmation feature does not provide any benefit for messages from the Inbox, but TC/Web does not distinguish from where a message came. Therefore, it is possible to send a confirmation for an archived inbox message. Also, note that it is not possible to send confirmations for cancelled messages. The state of a message is not immediately visible in Archive; you can use the History view to see it.

Recipients

Addresses can be stored in TC/Web recipient entries.

A recipient entry can contain multiple addresses. Each address can be of a different media type: fax address, e-mail address, SMS address or phone number. Each address can be turned on and off by using an Active flag.

Distribution Lists are lists of recipients.

Address Books

Recipients are stored in address books. There are three different address books:

- Personal address book – Recipients in this address book are available only to one user.
- Group address book – Recipients are available to all users in the group.
- System address book – Recipients are available to all users on the server.

The personal address book appears as [**UserID**] Addressbook in TC/Web.

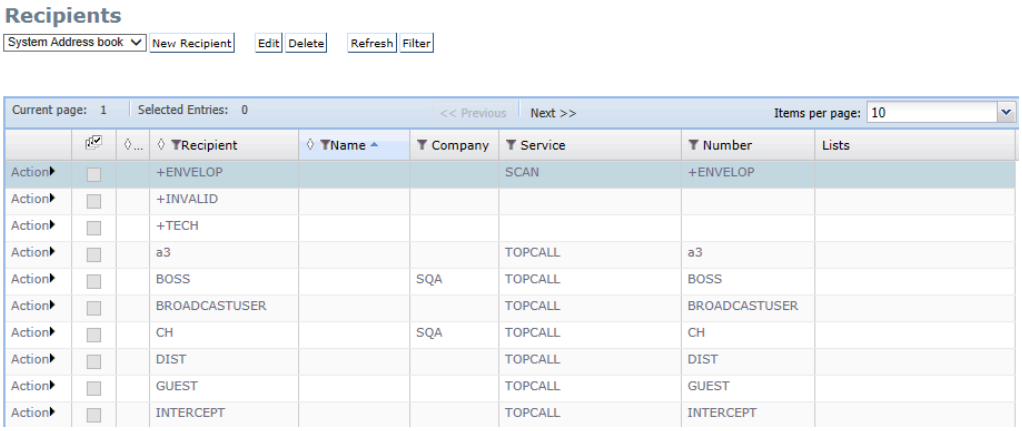
The group address book appears as [**Groupname**] Addressbook in TC/Web.

The system administrator can configure the user’s reading / writing rights in the address books.

Only the recipients in one address book can be seen at a time.

In the Recipient tool, the **Lists** column displays which distribution lists, if any, the recipient belongs to. Up to three distribution lists are shown. An **All Lists** button displays a view of all distribution lists the recipient belongs to.

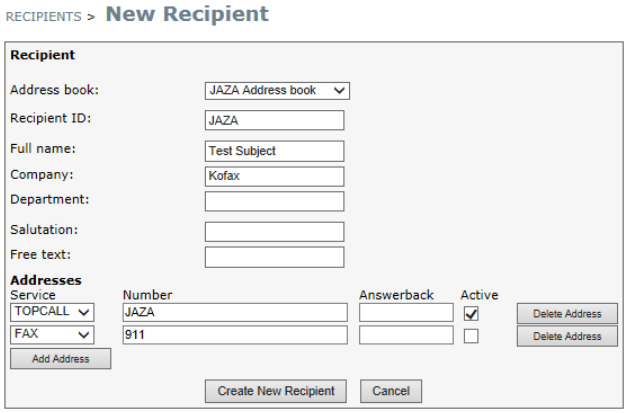
The distribution lists are displayed in the Distribution Lists tool.



Picture 72: Recipients

Creating and Editing Recipients

A recipient can be created and edited from the recipients tool or from the distribution lists tool.



Picture 73: Editing a recipient

A recipient can contain one or more addresses.

Each address must have a service and a number. The available services depend on the TC/Web system.

Addresses can be marked as active. When a message is addressed to a recipient, the message will be sent to the **first active** address.

Additional addresses can be added with the **Add Address** button.

Note that the TC/Web system can be configured so that there is no **Add Address** or **Delete Address** button.

Also, the system can be configured so that there are no **Answerback** or **Department** fields.

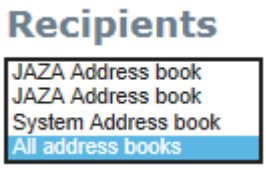
Equivalent Address Checks

If a recipient is saved, TC/Web will check all of the addresses in the recipient to see if there are other recipients having the same service and number in their first active address.

The check is performed in all of the address books that the user has read access to. If another recipient is found, the user can decide to continue with the editing anyway (creating a recipient with the same service and address as another recipient) or cancel the operation.

All Address Books Option for System User Administrator

When a user administrator is logged in, his address book selector at the top of the “Recipient”, “Recipient Selector”, and “Distribution List” tools has an option “All Addressbooks” in addition to the current three:



Picture 74: All Addressbooks option

- “System Address book”
- “[Group ID] Address book”
- “[User ID] Address book”

If the user selects the “All address books” option, the tool list will contain all recipients in the entire system. This will allow the user administrator to perform searches via the filter tools for any recipient on the entire system.

It is possible to edit recipients and distribution lists of other users.

Limitations:

- When editing a distribution list of a second user, the administrator can add recipients/distribution lists from a third user’s address books. Such entries in distribution lists will not be visible for standard users, because they do not have the rights to view/edit these records, so it is not recommended to add recipients from other users. Nevertheless, sending is possible to these “invisible” addresses.
- It is not possible to create a new recipient or distribution list for other users, only changes are allowed.

Note The user must have the read right for ‘All Priv. Address Books’ to view recipient/distribution lists and the writing right for ‘All Priv. Address Books’ to change recipients/distribution lists. This feature is not accessible during the user switch.

Distribution Lists

Distribution lists are collections of recipient entries. By entering the name of a distribution list in the New Message tool, a user can send a message to all the recipients in the distribution list.

Distribution lists are also used to send a broadcast message with TC/Broadcast.

Because distribution lists are collections of recipient entries, changing a recipient in one distribution list will affect all of the other distribution lists that contain this recipient. Therefore, if the address of a recipient needs to be changed, it has to be changed only once.

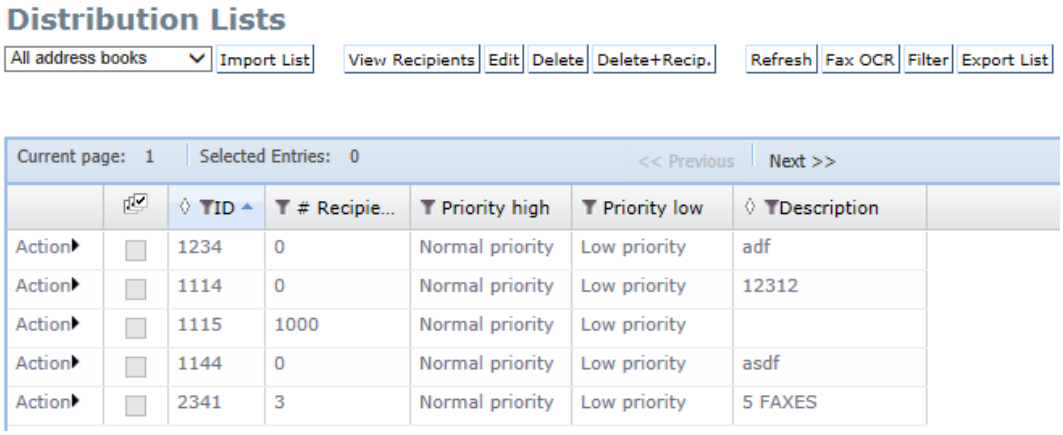
Distribution lists may only contain recipient entries; they cannot contain other distribution lists.

Distribution lists are stored in one of three address books: System, Group, or Personal. Please refer to the Recipients section of the manual for more information on address books.

A distribution list can contain up to 30,000 recipients.

Many actions can be performed in the Distribution Lists tool:

- Creating or editing a distribution list
- Selecting the recipients for a distribution list
- Importing recipients from a text file
- Exporting recipients to a text file
- Creating a Fax OCR coversheet (TC/Broadcast only)



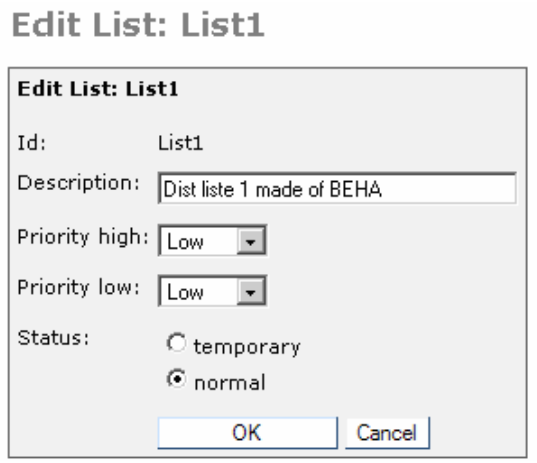
		ID	# Recipie...	Priority high	Priority low	Description
Action		1234	0	Normal priority	Low priority	adf
Action		1114	0	Normal priority	Low priority	12312
Action		1115	1000	Normal priority	Low priority	
Action		1144	0	Normal priority	Low priority	asdf
Action		2341	3	Normal priority	Low priority	5 FAXES

Picture 75: Distribution Lists tool

Creating or Editing a Distribution List

To create a new distribution list or to edit an existing one, click the **New List** or **Edit** button.

The basic properties, such as the description for the distribution list, can be entered and edited here.



Picture 76: Properties of a distribution list

TC/Broadcast only:

Priorities:

Priority high and **Priority low** can be set for a distribution list.

When a broadcast job is sent with the New Job tool, the user can choose to send it with high or low priority. The user is simply choosing which of the two priorities that are saved in the distribution list to use.

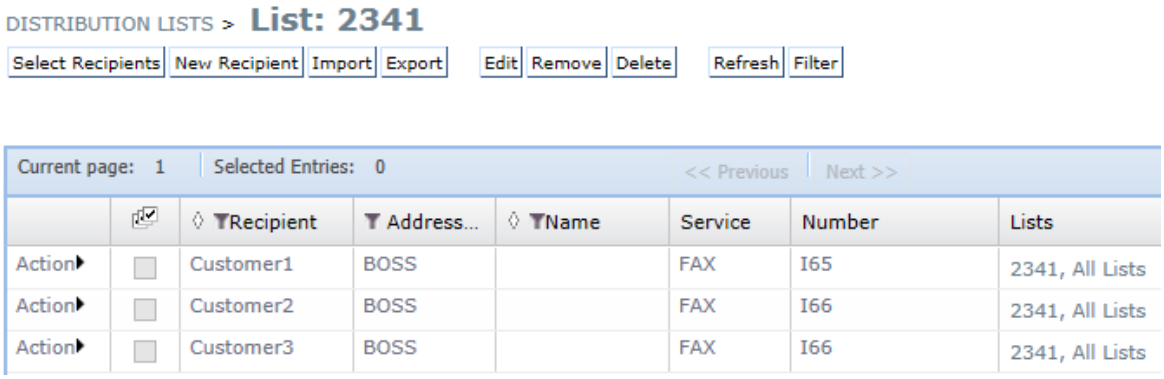
Status:

A list with the status **temporary** will be deleted after the broadcast job was successfully sent. Temporary lists are created by TC/Broadcast to hold a list of all of the recipients that could not be sent in a job.

Note The Status option is only visible when an existing distribution list is edited. If a new list is created, the Status option will not be visible to the user and will automatically be set to normal.

Changing the Recipients of a Distribution List

Clicking on a list in the Distribution List tool will display a list of all the recipients in the distribution list.



Picture 77: Recipients of a distribution list

The **Remove** button will remove a recipient from the list, but leave the recipient entry unchanged.

The **Delete** button will delete the recipient entry, thereby removing it from all distribution lists.

From the view of the recipients in the distribution list, clicking the **Select Recipients** button will open a new tool which allows recipients to be selected and added to the distribution list.

If the system is configured for “Nested Distribution Lists”, it will also be possible to include a distribution list in another list. There is no limit for the number of lists a list can contain.

TC/Broadcast only:

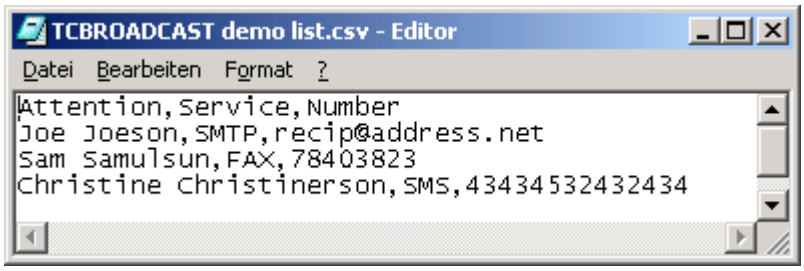
If a job is sent to a distribution list and it contains another distribution list, the system will ensure that each recipient is sent only one message, even if the recipient is included in more than one of the lists.

Importing Recipients from a Text File

Recipients can be added to a distribution list by importing recipient data from a text file. This functionality facilitates importing distribution lists that are stored in other applications or databases. A list of addresses can be exported from another application, formatted so that it will be accepted by TC/Web, and then imported into a TC/Web distribution list. When a text file is imported, all of the addresses in the text file are imported as recipients into the same address book as the distribution list. The text file has a simple format. The first row is a header row defining the fields that are included in the file, and each following row holds the data for one address.

Text File Format Specifications

The file must either be comma separated (.csv) or tab separated (.tsv). This means that each item in each row must be separated by a comma or a tab.



Picture 89: Text file to import list

The file encoding must be like the following:

Encoding	BOM bytes	Unicode supported
UTF-8 with BOM	EF BB BF	Yes
UTF-16LE with BOM (little-endian)	FF FE	Yes

Encoding	BOM bytes	Unicode supported
ANSI (standard code page on the system)	none	No

Note

- Answerback values (such as for TELEX) can be appended with a "-" after the address in the "Number" field.

  For example, to specify a number of 3348, and an answerback of 9987, use the following syntax: 3348-9987.
- The RecipientID field will be required only in an import mode if the Update import mode is being used.

Header Row

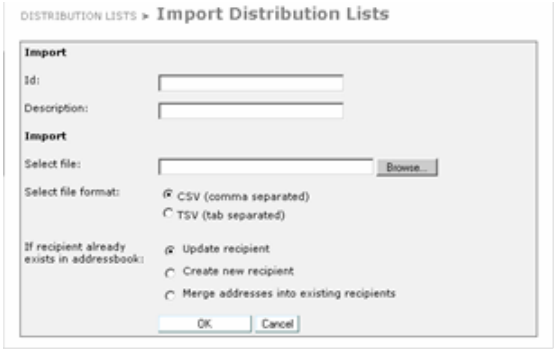
- The first row indicates which fields are included, and the order of the fields.
- Here is a list of the fields that can be included (Required fields are in bold):
  `Attention`, **`Service`**, **`Number`**, `RecipientID`, `UserID`, `Type`, `Freetext`, `DelTypeDef`, `Company`, `Department`, `UserBelongsTo`, `Active`, `DirsyncAllowed`

Data Rows

- Each following row in the text file is an address.
  Each address row must have the same number of fields as the header row.
- The name of the Service must be an available service on the TC/Web system.
- The “Attention” field in the text file will be imported to the “Full name” of the recipient.
- If the text file contains no “RecipientID”, the “Attention” data in the text file will be imported to the “RecipientID” of the recipient as well.

Performing the Import

The Import form can be opened in two ways.



Picture 79: Import form

- Clicking the **Import List** button on the Distribution Lists tool which will create a brand new list.

- First opening a Distribution List and then clicking the **Import** button will import a list of recipients into an existing distribution list. Note that when importing to an existing list, all existing recipients will be removed before the new recipients are imported.

Handling Existing Recipients:

The import form has a field called “If recipient already exists in address book:”.

This field determines how an address will be imported if a recipient with the same RecipientID already exists in the address book where the list is being imported. There are three possible import modes. A system administrator can configure which modes will be available to the user.

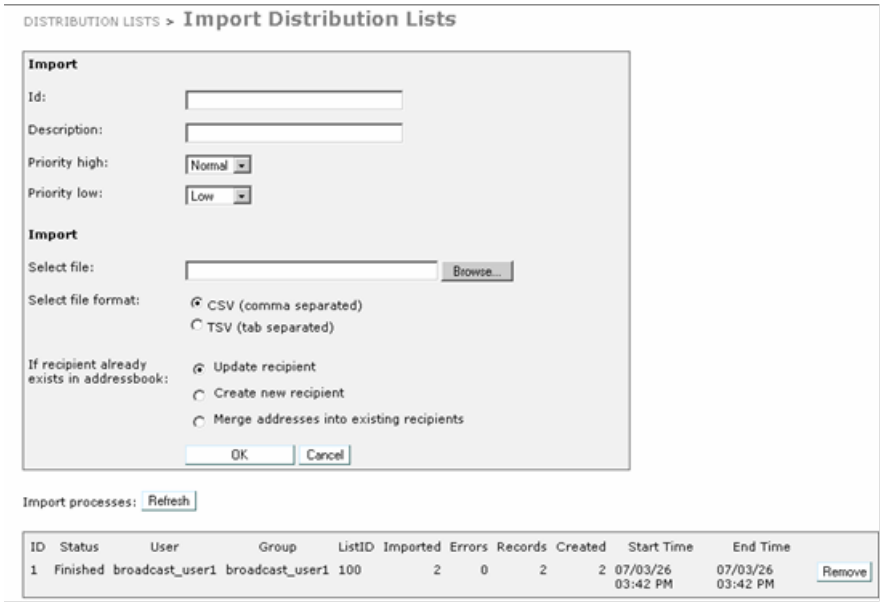
- Update Recipient – When an existing recipient in the address book has the same recipientID as a row in the import file, the data of the existing recipient is updated with the data contained in the text file.
- Create New Recipient – When an existing recipient in the address book has the same RecipientID as a row in the import file, a new recipient is created with the data in the text file. The RecipientID of the new recipient is the RecipientID with a “~00001” appended to it.
- Merge Addresses into Existing Recipients – When an existing recipient in the address book has the same RecipientID as a row in the import file, the address data from the text file will be added to the existing recipient, but the recipient data itself (such as company and department) will not be changed.

Import File Validation:

When importing the file, TC/Web will perform a validation on the text file to ensure that it is in the format described above. If a problem is found with the file, TC/Web will not perform the import and the user will be notified by a text message describing the problem.

All importing processes are running in the background. The user submits an import file to TC/Web, which is placed in an import query. It is possible to run from 1 to 5 imports at the same time (per server). The user can disconnect from TC/Web but the import file which he has submitted will be imported.

By opening the Import Distribution Lists view, the user can see distribution lists which are currently in import query, importing or already imported, anytime.



Picture 80: Import Distribution List

The user can refresh this list by clicking Refresh. When the import process has finished, it is possible to remove it from the list by clicking Remove. Columns in this list contain the following values:

Column	Description
Imported	Number of recipients added to distribution list
Errors	Number of errors
Records	Number of processed records in input file
Created	Number of recipients created

Import processes: Refresh

ID	Status	Priority	User	Group	ListID	Imported	Errors	Records	Created	Start Time	End Time	
2	Finished	0	kit	apple	r2	2	0	2	0	5/23/2005 12:10:53 PM	5/23/2005 12:10:53 PM	Remove

Picture 81: List of imported distribution lists

Each import process can have one of the following statuses:

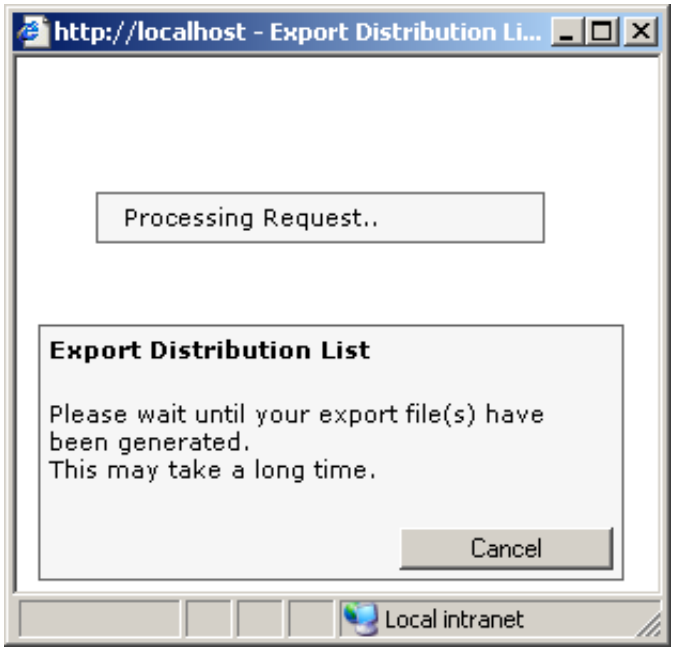
Status	Description
Waiting	import process is in query (set when import process is added to query)
Importing	distribution list is importing
Stopped	distribution list import was stopped (not currently used)
Finished	distribution list import is finished

Status	Description
Paused	distribution list import is paused (not currently used)
Terminated	distribution list import is terminated (only when service was stopped and import process was not finished)

Exporting Distribution Lists to a Text File

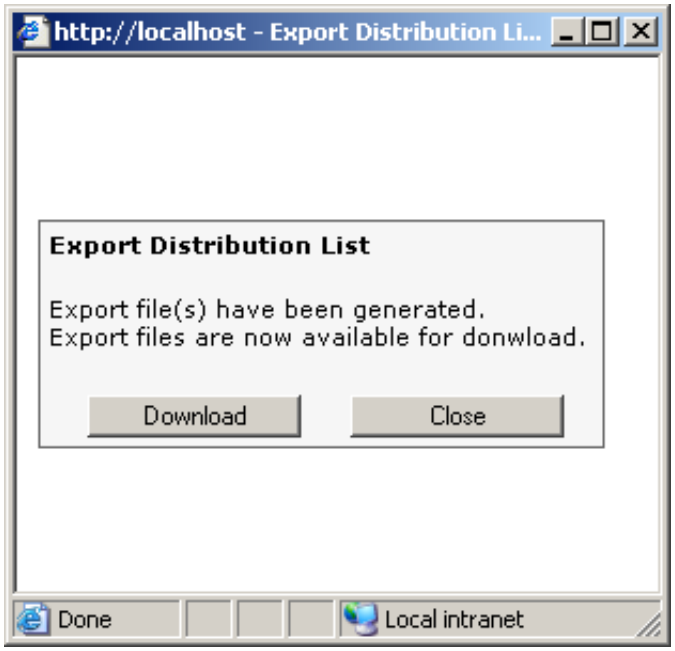
To export the recipients in a distribution list to a local file, select a distribution list and click the **Export List** button.

A new window indicating that the distribution list is being generated will be displayed. There is the possibility to cancel the export by clicking the **Cancel** button.



Picture 80: Export of a distribution list. Export file(s) generation.

After the export files have been generated, there are two options: Download this file or close popup window. Click **Download** if you want to save the exported distribution list to your computer.



Picture 81: Export of a distribution list. Export file(s) have been generated.

A standard browser file download dialog will be displayed that allows saving the text file to the computer. See the section on importing distribution lists for details on the file format.

The system administrator can configure whether the exported file is TSV (tab separated) or CSV (comma separated).

The file is always exported in the UTF-16LE (little-endian) format with BOM.

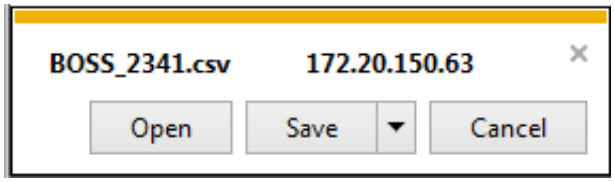
The system administrator can configure which addresses from each recipient entry will be exported. Typically, only the first active address of a recipient will be exported.

The system administrator can also configure which fields from each recipient will be exported:

- The standard fields: Attention, Service, Number, RecipientID
- Extended fields: All of the fields listed above.

  If a user exports a list that contains other lists, the recipients from all of the included lists will be exported to the file; however, the names of the included lists will not be exported.

If a user selects multiple distribution lists and then clicks the **Export List** button, the lists will be delivered to the browser in a single .ZIP file. However, the exporting of multiple lists only supports lists where the name contains letters without umlauts or accents.



Picture 82: Export of a distribution list. Saving export file(s)

Note

- The “Full Name” of a recipient will be exported to the “Attention” field in the text file.
- To avoid automatic opening of the file, be sure to set your web browser’s options appropriately.
- The export of multiple files to a ZIP file does not support characters with umlauts or accents such as Ö,Ü,Ä.

Downloading Fax OCR Cover Sheets

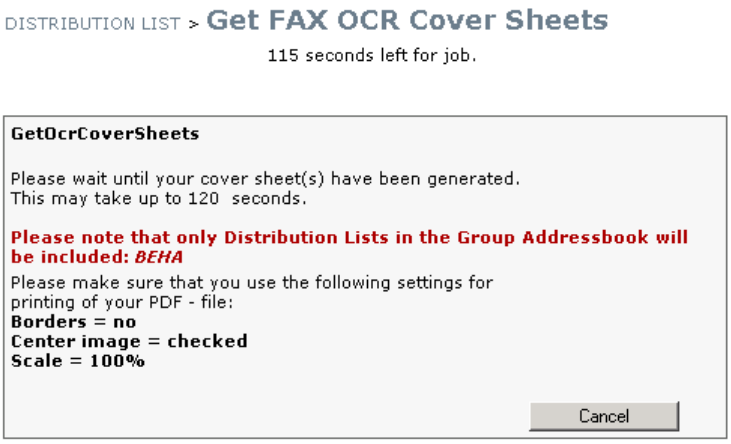
TC/Broadcast only.

On specially configured systems it is possible to create a TC/Broadcast fax OCR cover sheet in PDF format.

A fax OCR cover sheet is a special form including a list of the user’s distribution lists. The user can use the form to send a broadcast message by filling out the form and faxing it, along with the fax to be delivered, to the TC/Broadcast system.

To download a Fax Cover Sheet, click the OCR button.

Immediately after clicking this button an additional window will be opened by your browser indicating how long it may take at your provider’s site to generate your cover sheet(s). The time remaining for the task is updated every 5 seconds.



Picture 83: Download of OCR fax cover sheets

To be usable with the Fax Cover Sheet, Distribution Lists IDs must be numeric and contain more than four numbers. To use the Fax OCR Cover Sheet, UserIDs must also be numeric.

Note

- Only distribution lists in the group address book will be included on the cover sheet.
- Only 450 distribution lists can be displayed on the cover sheet, additional distribution lists will not be displayed and cannot be selected. (50 per page 9 sites = 450).
- To avoid automatic opening of the file, make sure that you have set your browser options accordingly.
- TC/Web will deliver information on how you should print the fax cover sheets. It is important to follow the instructions to ensure that the fax cover sheets can be recognized correctly by the TC/Broadcast system.

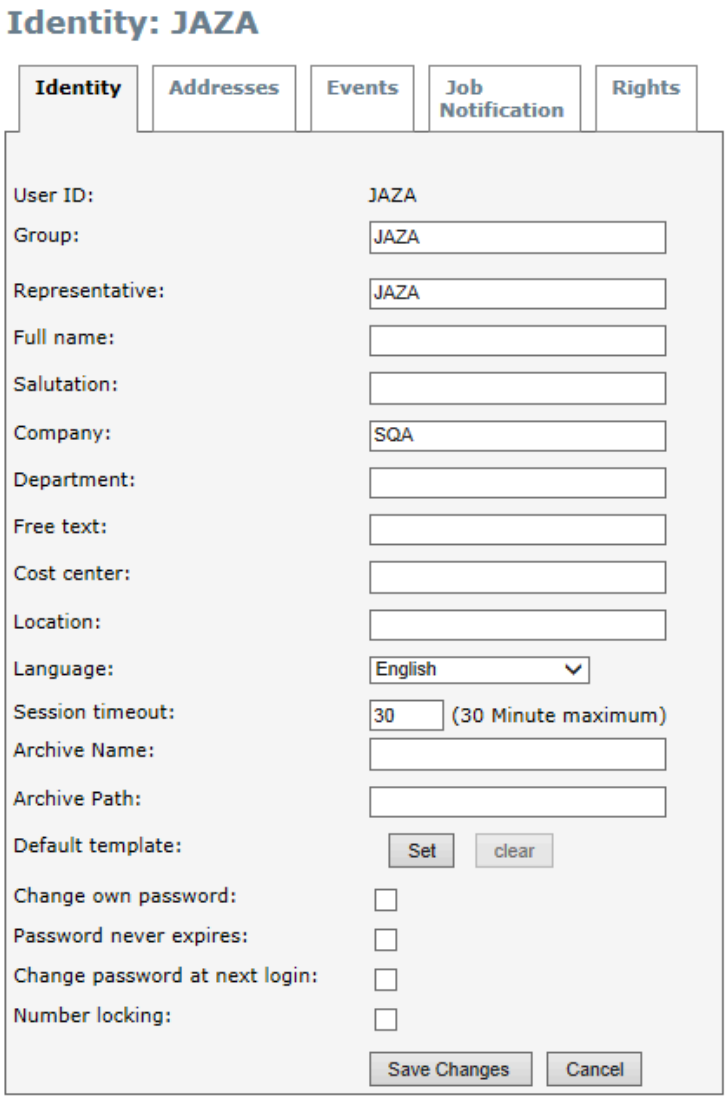
  By switching to another user it is possible to create a TC/Broadcast fax OCR cover sheet for this user.

Options

This section describes the Options.

Identity

The Identity tool provides access to the basic information of a user.



Picture 84: Identity tool

When an administrative user accesses a user via the User tool, the Identity tool for that user is displayed.

From the Identity tool, tabs can be used to move to the Addresses and Events tools for the current user.

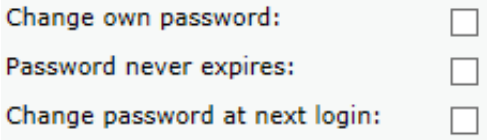
Which fields are displayed in the Identity tool, and whether they are editable can be configured on a per user basis by a System Administrator.

Password Options

The following password options are available for user administrators:

- Select **Password never expires** to prevent a password from expiring.
- Select **Change own password** to allow users to change their password.

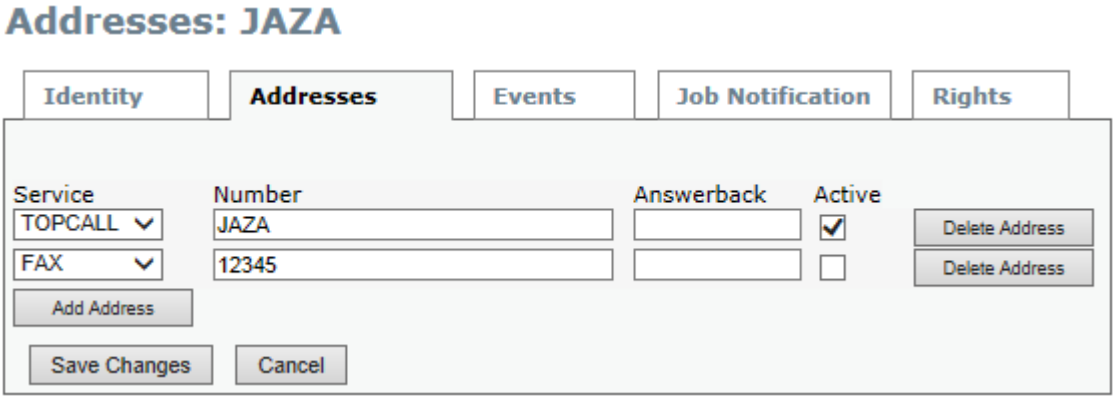
- Select **Change password at next login** to force users to change password at their next login. Click Save Changes to confirm the changes.



Picture 85: Password options

Addresses

With the Addresses tool, it is possible to edit a user's addresses.



Picture 86: Addresses tool

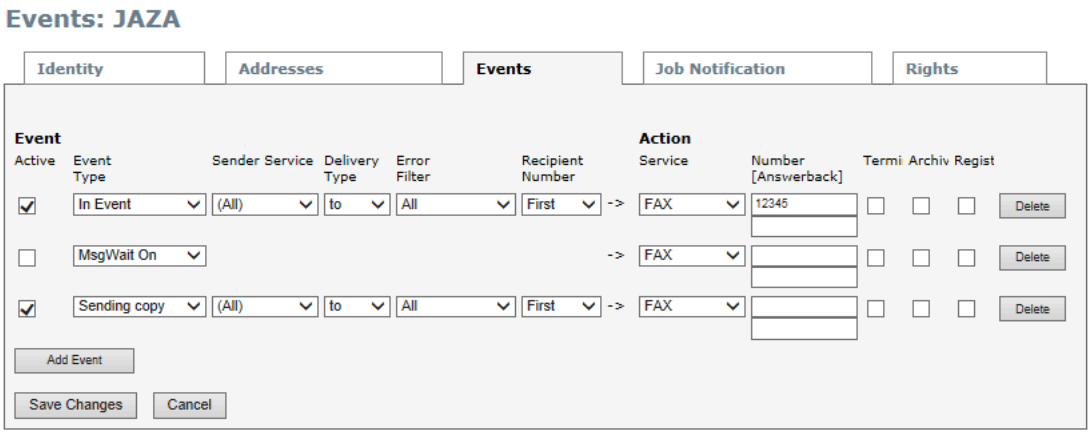
Whether the Addresses tool is available for end users can be configured by a System Administrator.

Events

The Events tool enables the editing of a user's events.

Whether the Events tool is available for end users can be configured by a System Administrator, who can also configure which fields in an event are visible, and whether the end user can create new and delete existing events.

All changes to events, including editing, creating and deleting events are saved only after clicking the Save Changes button.



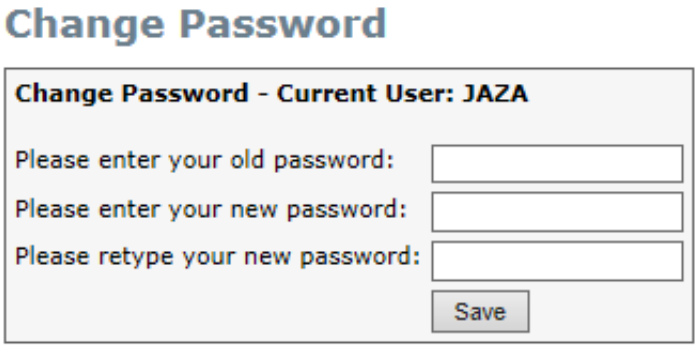
Picture 87: Events tool

Note

- Once an event has been created, the Event Type can no longer be edited.
- Events of event type MsgWaitOn and MsgWaitOff can only have their action further configured. The Service, Delivery Type, Error Filter and Recipient Number fields have no meaning for this type of event and cannot be configured.
- There can be only one event of type MsgWaitOn.
- There can be only one event of type MsgWaitOff.

Change Password

This tool is used to change a user's password.



Picture 88: Change Password

If no error occurred, the confirming message "Your password has been changed" appears.

Note The password has been changed only after this message appeared.

Possible Error Messages

Two errors are possible:

- **"Your password has NOT been changed. You did not enter your old password correctly. Please retry ..."**
  For security reasons, a user must enter his/her old password in order to change their password.
- **"Your passwords did not match. Please retry …"**
  This error occurs if both fields for the new password do not match. The user must enter the new password two times to ensure that there is no typing mistake.

Settings

The Settings tool allows the user to configure how TC/Web should work.

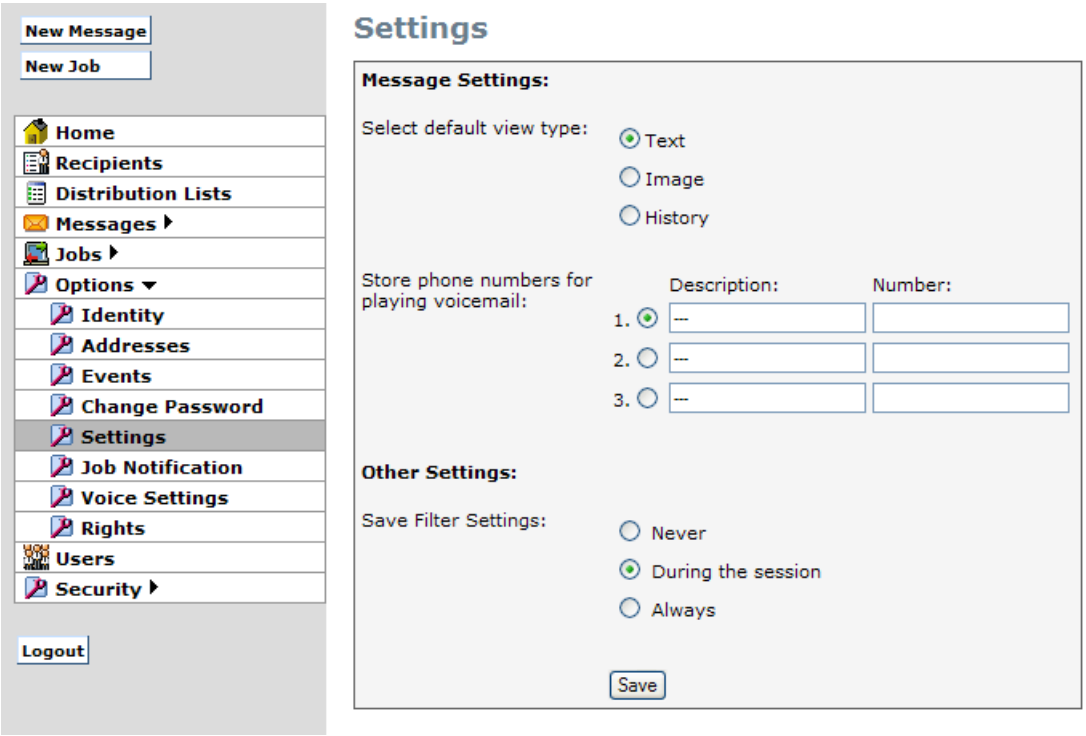
Default message view type

A user can select which of the three message views (Text view, Image view, History view) a message should open with.

The History option is only available to users configured to be able to access message history.

Stored phone numbers

A user can configure up to three phone numbers to be used for playing voicemail messages via phone. For each phone number, a description and a number can be stored.



Picture 89: Menu settings

Save Filter Settings

A user can configure when the filter settings that they have applied to a tool will be remembered.

The control offers the user three options:

- **During the session** - When a user applies a filter, the settings will be remembered and reapplied when the user revisits this tool. However, when the user logs out the filter settings are not saved and the next time that the user logs in all of the tools will have their default filter settings.
- **Always** - When a user applies a filter, the settings are remembered and always reapplied when the user revisits this tool, even after logging out and in again.
- **Never** - Whenever the user opens a tool, the default filter settings will be applied.

Note

- In filter controls with text fields, the text is always saved, regardless of the users setting. However, the check box that determines whether the filter should be applied is saved based on the users setting.
- When switching to a different user, the filter settings of the administrative user will be applied, not those of the “switched” user.
- For a System User Administrator, the filter settings for the user entry on each server are completely independent.

Job Notifications

TC/Broadcast only:

A user can select to send notifications for three job events:

- When a job is started.
- When a job is completed.
- When a job changes to an error state.

For each job event it is possible to set up to 9 addresses that should receive a notification.

Each notification address requires a service and a number. The **Attention** field is optional.

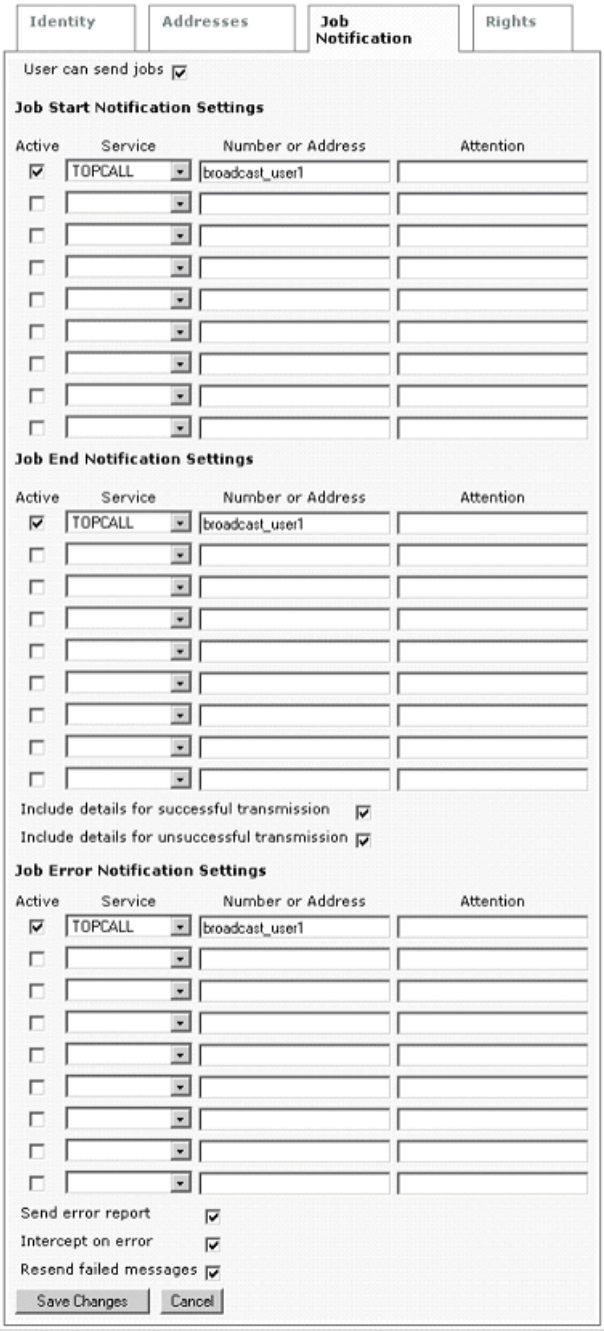
For the end notification of a job a user can select to send a notification on successful and/or unsuccessful termination.

If a job goes into an error state (some recipients are not reachable), a user can select if a notification should be sent, and/or the job should be sent to the customer care center of the TC/Broadcast service provider.

Several check boxes allow the behavior of the notifications to be configured:

-
- **Include details for successful transmission**: The Job End Notification will display details for every address that the message was successfully delivered to.
- **Include details for unsuccessful transmission**: The Job End Notification will display details for every address that the message could not be delivered to.

- **Send error report**: When a job cannot be created, send a Job Error Notification.
- **Intercept on error**: When a job cannot be created, forward the Job Request to the Problem Job Items tool so a system operator can correct it.
- **Resend failed message**: If checked, the job end event creates a new job containing the failed addresses.



Picture 90: Setting job notifications

Chapter 3

Extended Features

This section provides the extended features of TC/Web.

Directly Open a Specific Page After Login

On logging in to TC/Web, it is possible to configure a default page which will be shown by default. This can be done by adding to URL “tool=<tool_id>” option.

Example: `http://www.tcweb.com/?tool=APP_ARCHIVE`

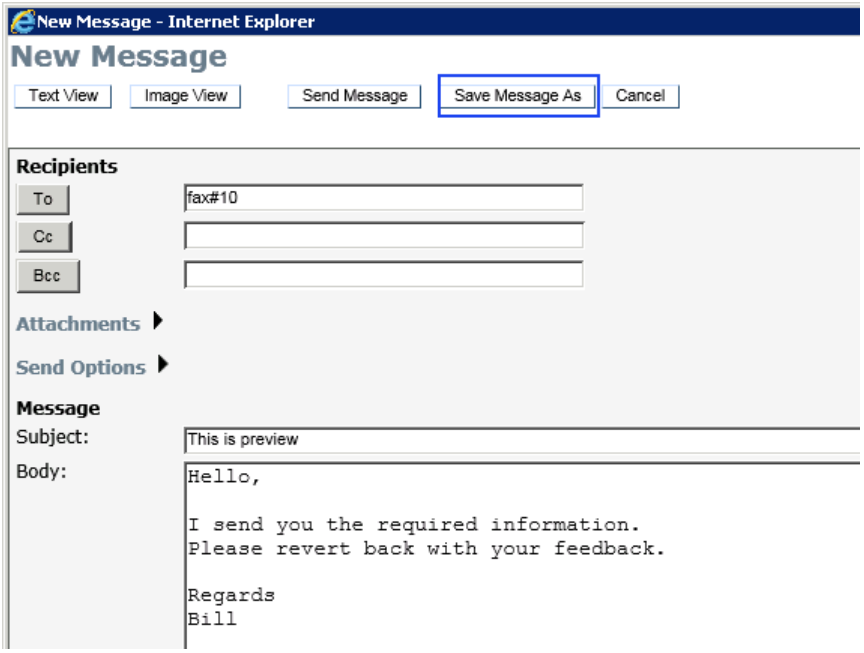
Available tool ids:

Tool id	Description
APP_INBOX	Inbox
APP_OUTBOX	Outbox
APP_PUBLIC	Public folder
APP_PRIVATE	Private folder
APP_SYSTEM	System folder
APP_ARCHIVE	Archive
APP_ARCHIVE2	Archive 2
APP_ARCHIVE3	Archive 3
APP_ARCHIVE4	Archive 4
APP_JOBVIEW	Active jobs
APP_JOBPROBLEMS	Problem jobs
APP_JOBTERMINATED	Completed jobs

Save/Edit/Delete Message

Save a message

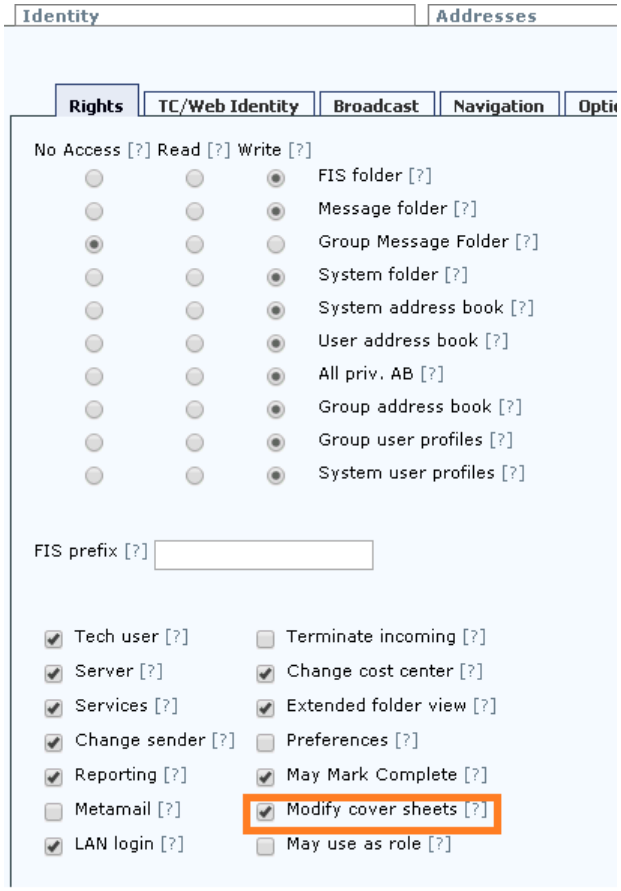
When editing an existing message or creating a new message, the user has the possibility to save this message to the TCOSS folder.



Picture 91: Edit message window

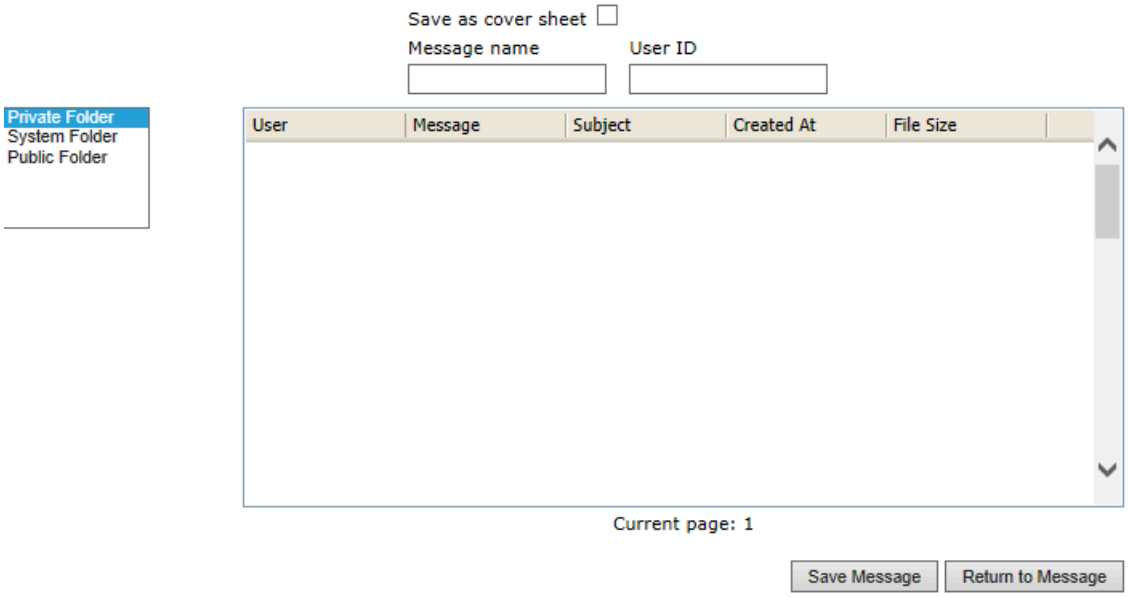
There are two ways of saving a message:

- **Save Message** – accessible only if the user edits an existing message
- **Save Message As** – available for new messages and for existing messages. While saving a message, the user will be prompted to choose a folder and a file name for the message.
- To Save a message as cover sheet, an additional right “Modify cover sheets” right has to be enabled in the ‘Rights’ tab(Picture ‘XYZ’). By default, when a new user is created in TC/Web, “Modify cover sheets” is enabled.



Picture XYZ: Edit message window

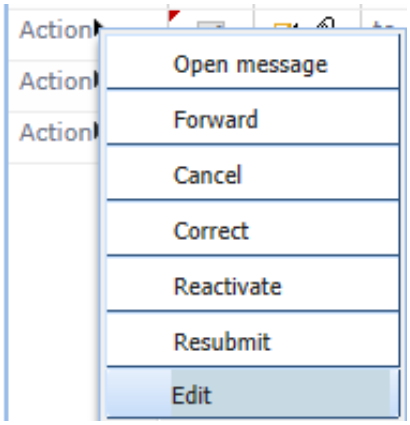
Note Activate the "Save as cover sheet" check box to store your message as a cover sheet. Cover sheets automatically have the extension CVR. The cover sheet name cannot be longer than 8 characters (11 characters including the CVR extension).



Picture 92: Folder and file name selection

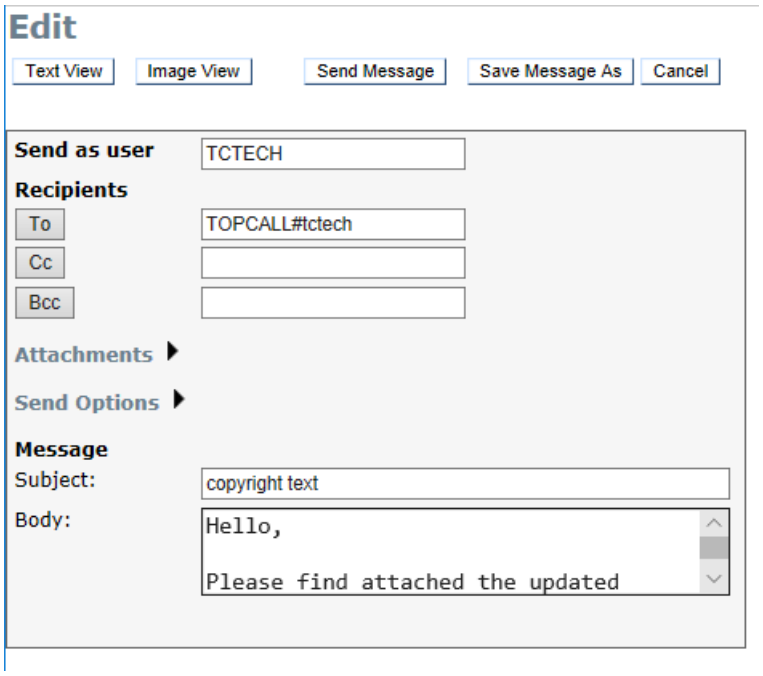
Edit content of the message

To edit a message, the user must call the Action popup menu for this message, and select **Edit**.



Picture 93: Edit button

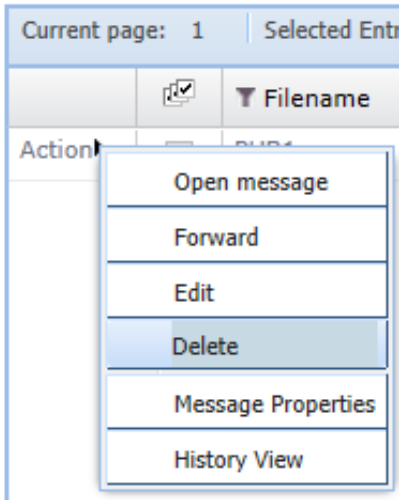
This function is accessible only in Public Folder, Private Folder and System Folder.



Picture 94: Edit message window

Delete a message

To delete a message from the TCOSS Folder, the user must call the Action popup menu for this message, and select **Delete**. This function is accessible only in Public Folder, Private Folder and System Folder.



Picture 95: Delete button

Depending on the settings in the User Rights, a user may or may not be allowed to perform this action.

Authorize/Reject Messages

This section describes how to authorize or reject a message.

Standard Functionality

For security reasons, some messages need to be authorized before being sent to the final recipient. Some users are set as authorizers in their user profiles, and others do not have the right to send out certain messages without authorization.

If you do not have the right to send out certain messages directly, you must not only specify the final recipient in the To field, but also the authorizer in the Auth field. The message will then be relayed to the authorizer. If approved, it will be sent out from the authorizer's workstation; otherwise, it will be sent back to you.

If you are an authorizer, outgoing messages from other users are first sent to you. If you approve, you can sign the message and send it out, and if you disapprove, you reject the message by clicking the Reject icon or selecting Reject from the Message menu. The message will then be sent back to the original sender. Depending on TC/Web configuration, you might be forced to open the message before you are allowed to authorize it.

Picture 96: Message authorization

There can be one or more authorizers for one message. The message will simply be sent from one authorizer to the next every time it is approved until it reaches the last authorizer in the chain. If he approves it too, it will be sent out.

Messages of the delivery type Auth must be authorized or rejected by a user who is specified as authorizer before it will be sent to the other users or another authorizer.

Note If the Group of recipients in the Auth field is different from its User ID, **Authorize** and **Reject** buttons are not displayed in TC/Web.

Authorizing messages

To authorize a message, an authorizer must click the **Authorize** button from the Message view. After authorization was confirmed, the message will be sent to the next authorizer or sent out if it was the last authorizer.

If a user is not assigned the rights to authorize a message, that user can only reject the message.

Picture 97: Confirm authorize window

Picture 98: Message successfully authorized

Rejecting messages

To reject a message, an authorizer must click the **Reject** button from the Message view. Afterwards, the New Message window will open, where the authorizer can enter information on why this message has been rejected. The message will not be rejected until the authorizer clicks **Send Message**. The rejected message will be sent to the originator of the message.

Picture 99: Confirm reject window

Picture 100: Reject message window

Signing messages

If an authorizer receives a message that contains a signature mark, the signature mark will be included in the message text.

Picture 101: Message with signature marks

If the authorizer has the right to authorize a message and the signature is not empty, the signature mark text is replaced with the link **Signature mark/Insert signature**. By clicking this link, the authorizer can sign a message. The name of the link is replaced with text indicating who signed the message and when.

Picture 102: Message with insert signature link

If a message was sent for authorization without signature mark, the authorizer must insert a signature mark before signing a message.

Picture 103: Signed message

If the authorizer does not have permissions to authorize a message without signing, he will be informed that the message must be signed before authorization. Otherwise, the message cannot be authorized.

Note Signing a message will be possible only if the authorizer has the **'Change message content'** right enabled.

Authorize Show Final Recipient in Preview

If an authorizer previews the outgoing fax message with the cover sheet, by default he sees only himself as a recipient of the message as he is the only active recipient in the message.

This behavior may not fulfill customer needs as often it is required that the authorizer would see exactly the same message as would be printed out on the receiving fax machine after the fax has been sent out.

This is possible by setting the registry key “AuthorizeShowFinalRecipientInPreview” to 1 which would change the behavior in the following way:

- If there is only one (fax) recipient in the message, in this way authorizer will see exactly what is going to be printed on the recipient's fax machine.
- If there are more than one recipient in the message, authorizer sees them all in the text preview of the message, but in the image preview he would see only the first one.

Preventing Authorization of Unread Messages

Sometimes it is required that authorizers open an outgoing message for inspection before they can approve it for sending. This is possible by setting the registry key “AuthorizeUnreadMessagesEnable” to 0.

In this case, it is not possible to authorize unread documents. The corresponding "Action" context menu of the message to be authorized is disabled.

Advanced Authorization Mode (“4-Eyes Authorization”)

In this mode, any user (even with full sending/authorizing rights) must select an authorizer before sending the message. After sending, TC/Web automatically inserts the sending user as the first authorizer of the message, thus forcing the sender to look at their own message first. After the sender has authorized their own message, the message goes to the second authorizer.

TC/Broadcast

This section describes TC/Broadcast.

About TC/Broadcast

TC/Broadcast is a system for sending, monitoring, and maintaining message sending to a large number of recipients (broadcasting). TC/Web provides a TC/Broadcast user interface for system administrators and end-users.

With TC/Broadcast it is possible to send broadcasts to as many as 30,000 recipients.

It is possible to send messages to a large number of recipients without TC/Broadcast in TC/Web.

TC/Broadcast, however, creates a professional broadcast environment by adding the following functionality:

- Ability to monitor a job in real time, with totals for waiting, sent, and failed messages.
- Ability to cancel a job, canceling all individual send orders created by the job.
- Collection and easy maintenance of recipients with bad addresses.
- 13 priority levels for broadcasts to ensure that important broadcasts get through.
- Delayed sending to enable emergency canceling of large broadcast jobs.
- Ability to initiate a broadcast via a fax machine or telephone.

For detailed information on TC/Broadcast, please refer to the TC/Broadcast manual.

Jobs / Sending Jobs

In TC/Broadcast, a broadcast message is referred to as a job. A job is simply a message with instructions to be sent via the TC/Broadcast system.

TC/Broadcast resolves the job message and creates and sends a message for each address. These individual messages are also called “send orders”.

Jobs can be sent in several ways:

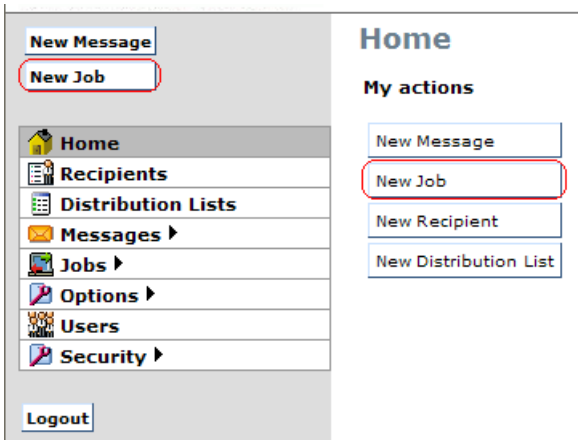
- New Job tool in TC/Web
- TCfW
- Any e-mail client
- Via a fax machine
- Via a telephone

  Addresses for a job can be specified by attaching a text file with a list of recipients. The format of the text file is briefly described in the “Importing a Distribution List from a Text File” section.

  Please refer to the TC/Broadcast manual for details on sending jobs.

New Job Tool

Click **New Job** in the toolbar, on the Home tool, or in the Active Jobs tool to create a new job.

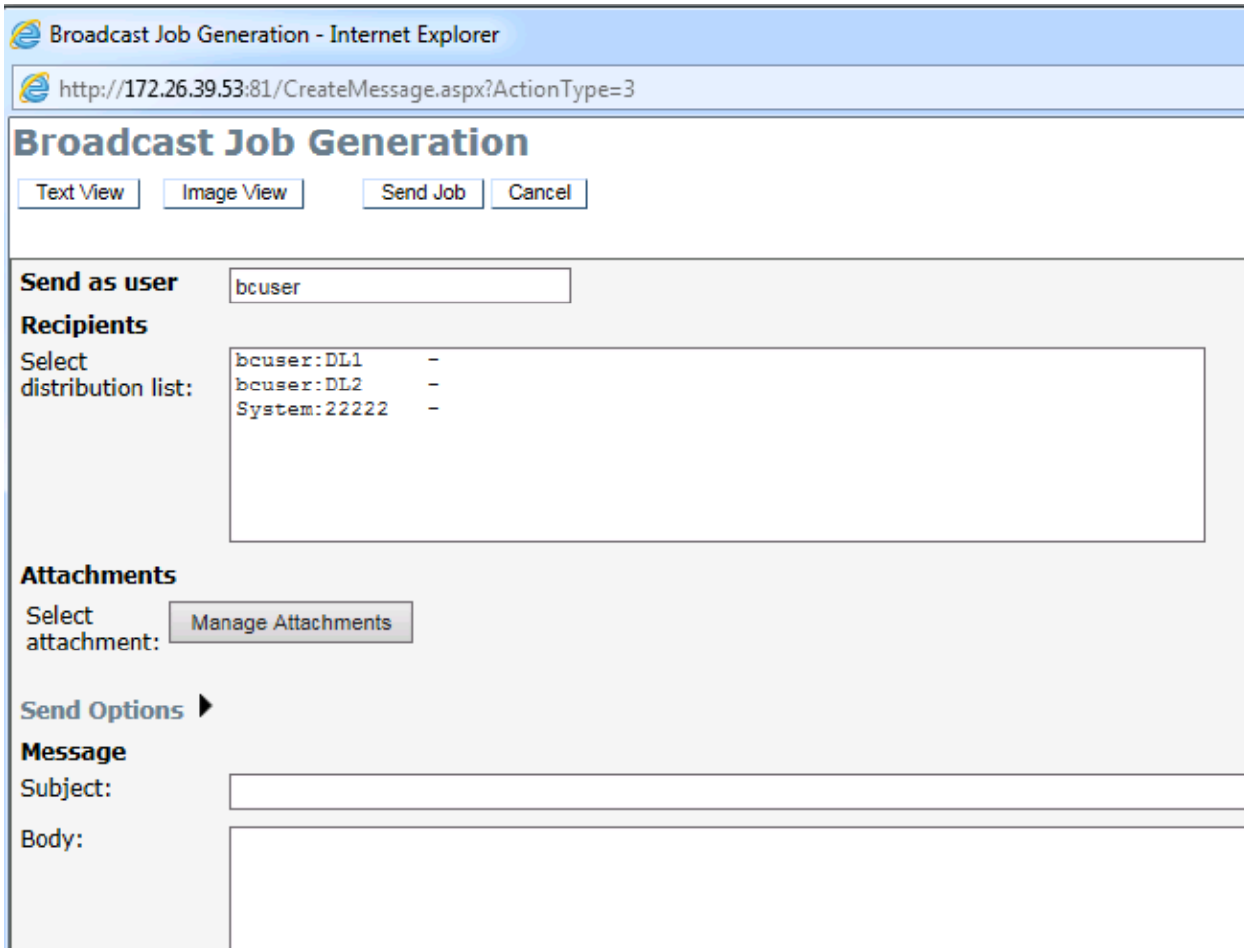


Picture 104: New Job button

There are two possible distribution list selectors depending on the TC/Web configuration.

Select which distribution lists the broadcast job should be sent to. Multiple distribution lists can be selected by holding the CTRL key while clicking on lists.

For details on how to configure the distribution list selector, see the *TC/Web Installation and Configuration* manual.



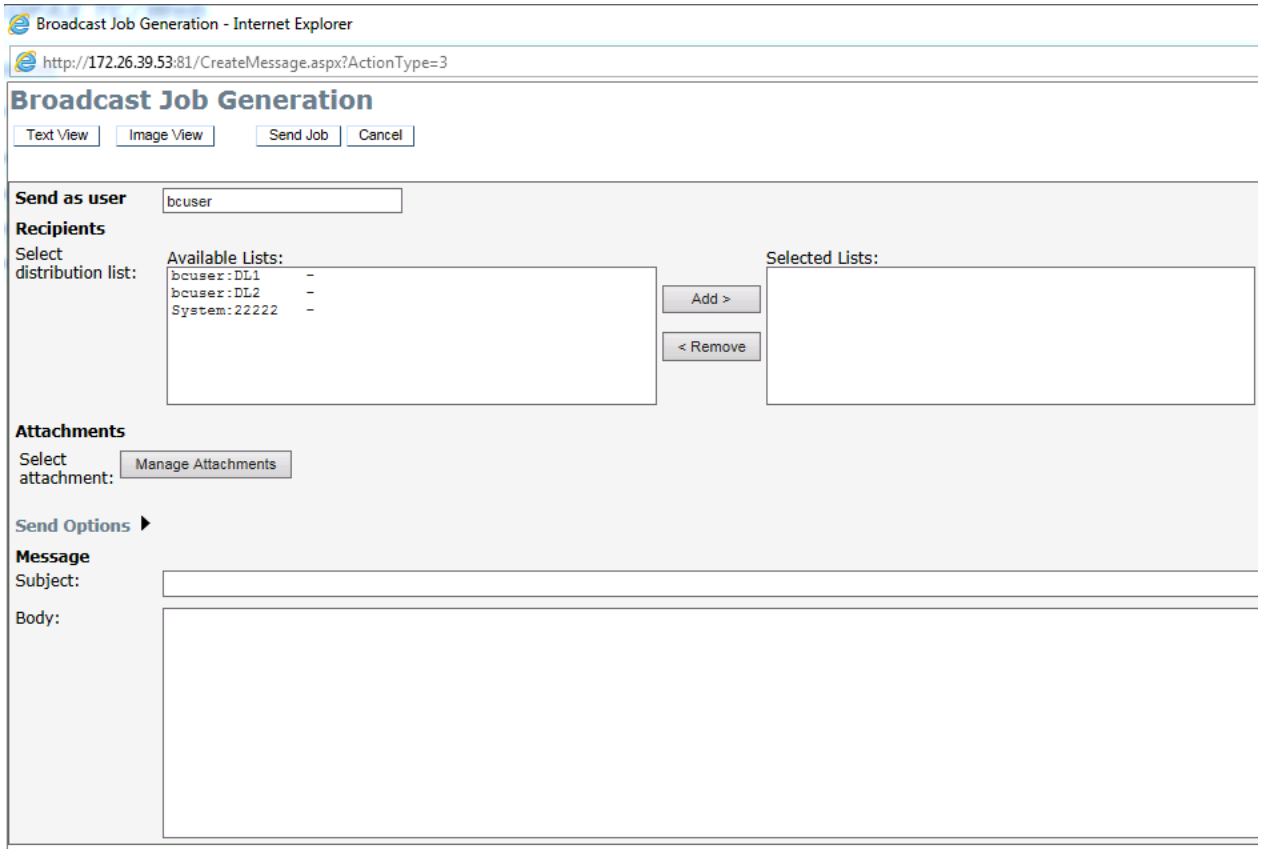
Picture 105: Broadcast Job Generation

The second selector has two list boxes, one containing all available lists, and the other containing the lists the user has selected. Lists can be added to and removed from the “Selected Lists” box via **Add** and **Remove** buttons.

You can **Manage Attachments** for the job in the same way as a normal message.

Enter a Subject and a Body, and select **Send Job**.

Note The TC/Broadcast system will make sure that recipients which are contained in more than one distribution list will only be addressed once.



Picture 106: Broadcast Job Generation

Job Monitoring

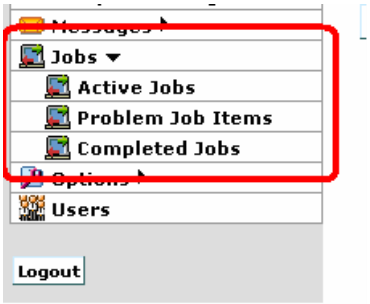
There are three tools for job monitoring:

- **Active Jobs** – Displays jobs that are queued or are currently being sent.
- **Problem Job Items** – Displays each individual send order that could not be delivered to its address.
- **Completed Jobs** – Displays jobs having already been sent.

The Problem Job Items tool is only available to system administrators.

A user with the right to administer all users requires also the right to list all users' outboxes.

A user with the right to administer a group requires also the right to list all group's outboxes.



Picture 107: The job tools

Active Jobs

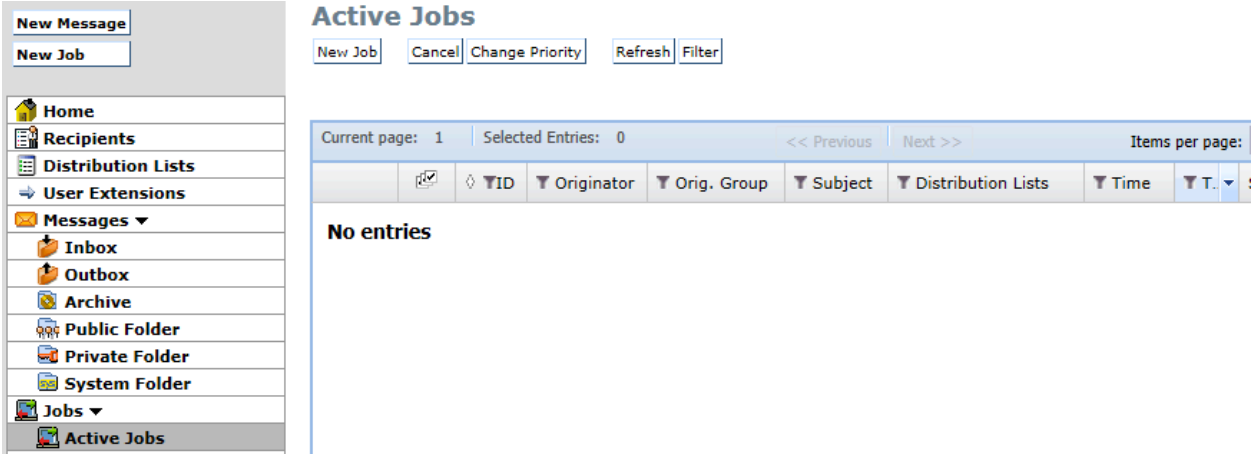
The Active Jobs tool displays all queued and currently sending jobs.

Jobs can be cancelled, or the priority of a job can be changed.

The status icons for jobs are the same as in the outbox.

The status icon is a checkmark when the job is complete.

Clicking on a job opens a tool which displays all of the individual send orders of the job.



Picture 108: Active jobs

Available columns:

- Id – JobID
- Originator – Job originator
- Originator Group – Originator group
- Subject – Subject of the message to be sent
- Distribution Lists – List of distribution lists for the current job
- Time – Date/Time for the current job

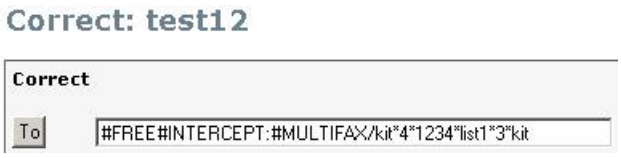
- Total – Total number of messages to be sent
- Sent – Number of messages already sent
- Failed – Number of failed messages
- Open – Number of messages still to be sent

Problem Job Items

The problem job items tool displays all send orders from jobs that could not be successfully sent.

The problem job item is a message. Clicking on a problem job item displays the message.

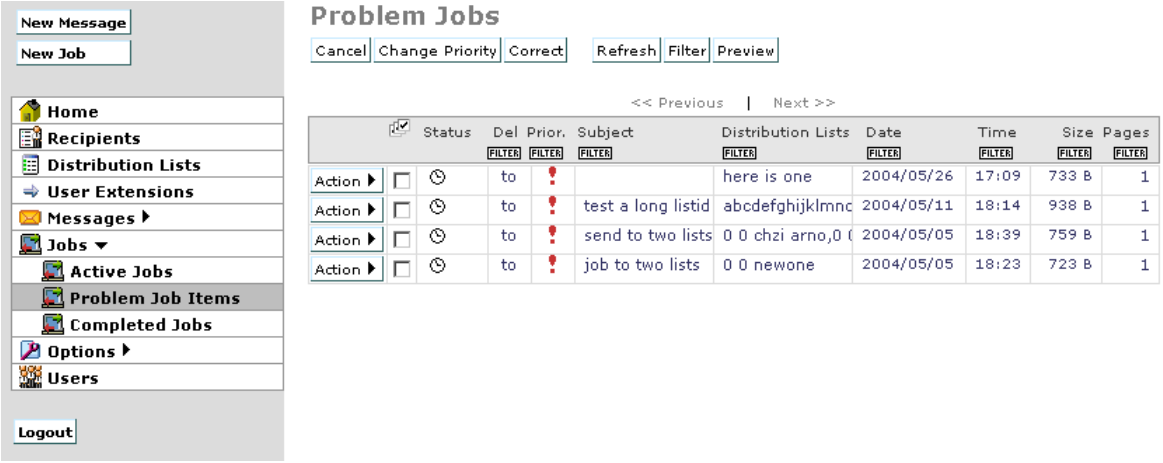
The **Correct** button allows a user to change the recipient of a problem job item and resend the message.



Picture 109: Problem Job Addressing

Note During job correction, the TO recipient must be changed. “#FREE#INTERCEPT:#MULTIFAX/“ must be replaced with “FREE#RESOLVE: “. For example “#FREE#INTERCEPT:#MULTIFAX/kit*4*1234*list1*3*kit“ must be changed to “FREE#RESOLVE:kit*4*1234*list1*3*kit“

The Problem Job Items tool is only available to a system administrator.



Picture 110: Problem Job Items

Available columns:

- Status – Current status of a job
- Id – JobID
- Originator – Job originator
- Del – delivery type

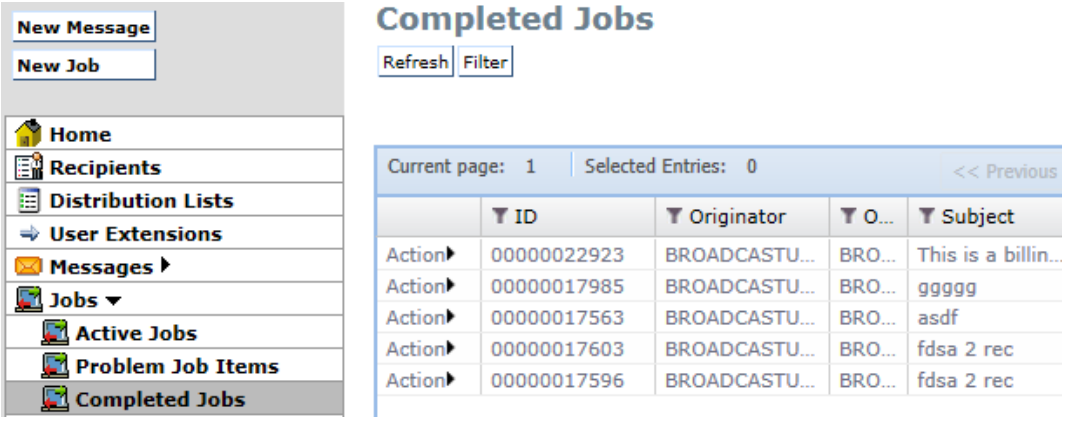
- Priority – Job's priority
- Subject – Subject of the message to be sent
- Recipient – Recipient from original job request
- Distribution Lists – List of distribution lists for the current job
- Date – Date for the current job
- Time – Time for the current job
- Size – Size of the job
- Pages – Number of pages in the job
- Cost center – Cost center
- Filename
- Result
- Msg ID
- Msg Name
- Response
- Reception Error

Completed Jobs

The Completed Jobs tool shows all of the jobs that have been successfully sent.

Clicking on a completed job shows the original message that was sent.

No actions are possible with completed jobs.



Picture 111: Completed Jobs

Available columns:

- Id – JobID
- Originator – Job originator
- Originator Group – Originator group
- Subject – Subject of the message to be sent
- Distribution Lists – List of distribution lists for the current job

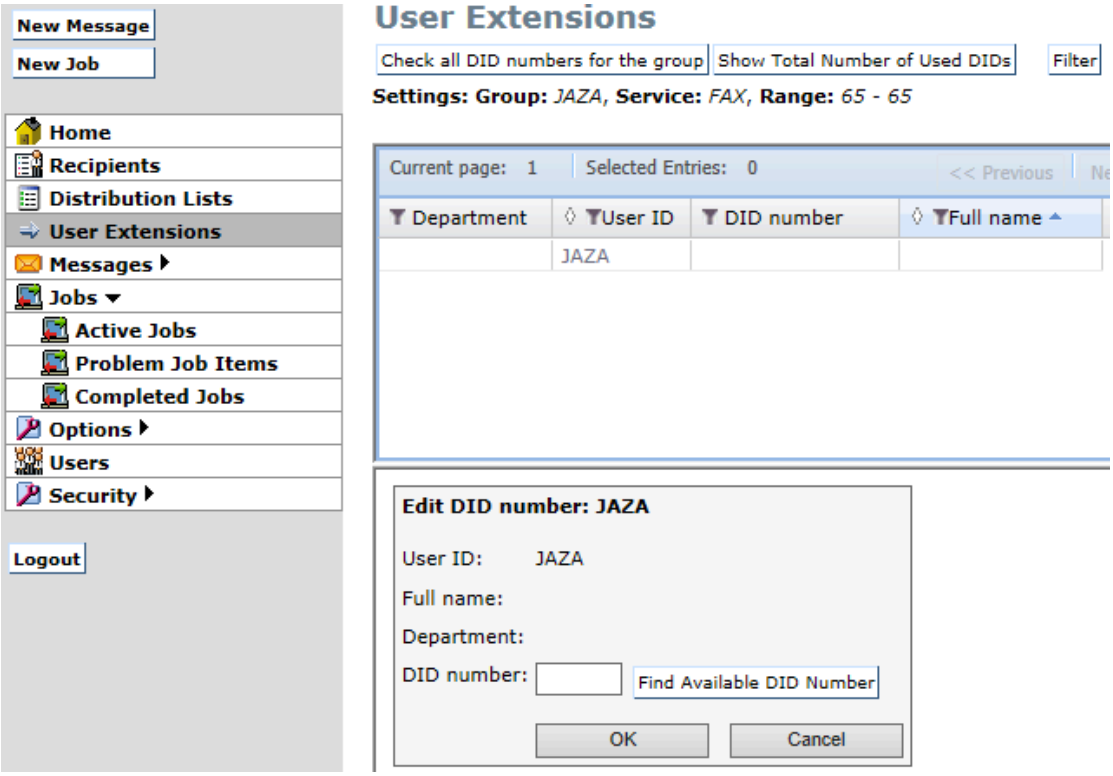
- Time Send – Date/Time when the current job was sent
- Total – Total number of messages to be sent
- Sent – Number of messages which were sent
- Failed – Number of failed messages
- Open – Number of messages which were not sent

User Extensions

The User Extensions tool allows an administrator to specify extensions for users for inbound signals. The administrator is configured to set the extension for a specific service.

For example, this tool could be used to configure the fax extensions for employees of a company.

The extension is known as a “DID number”.



Picture 112: Fax Plus settings

Administering DID numbers

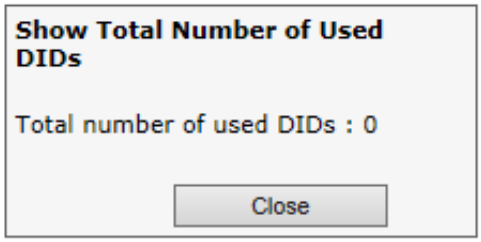
Administrators can only assign DID numbers in their configured range. It is not possible to assign the same DID number to more than one user. Administrators can only assign DID numbers for users in their group.

Click **Filter** and enter the user ID to easily locate users.

Select Show users with no DID number in the filter to display users without a DID number.

Click **Check all DID numbers** for the group to scan all users in the group and check if the DID number is in the specified range, or if the same DID number is assigned twice. If a problem is found, the name of the corresponding user will be displayed.

Click **Show Total Number of Used DIDs** to scan all users in the group and count the number of used DID numbers. The number of DIDs is displayed in popup window.



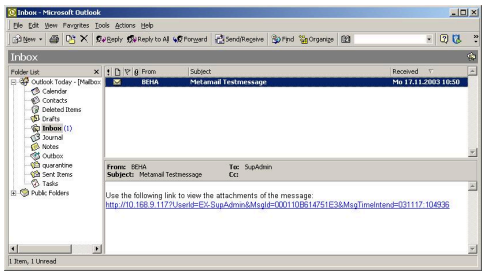
Picture 113: Number of DIDs

Metamail

The Metamail product saves storage capacity on linked mail systems (for example Microsoft Exchange). Normally, a user receives a fax as an image attachment in a message in the mail client.

With the Metamail feature, a user receives an internet hyperlink in the message instead. Clicking the link opens the TC/Web message in a web browser where the attachment can be accessed.

Instead of getting a fax as image attachment in the mail client, the mail contains a hyperlink (URL) to the fax.



Picture 114: Receiving fax

When the hyperlink is clicked, the login screen of TC/Web Access appears.

TC/Web can be configured so that a user does not have to log in to access a Metamail message.

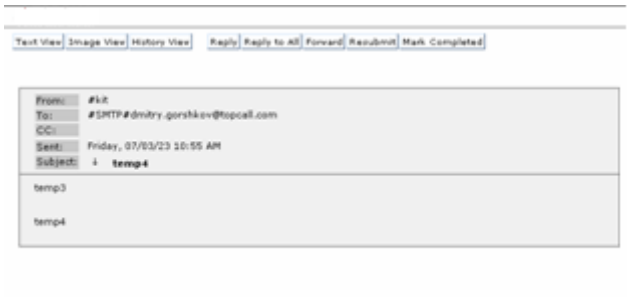
Picture 115: Metamail login

After correct identification (either login screen or “Autologon”) the message will be displayed.

The default view for messages opened with Metamail functionality is always the Image view.

From the TC/Web message window, the user can open the attachment.

A user is automatically logged out of the system when the browser window displaying the Metamail message is closed.



Picture 116: Metamail image viewer

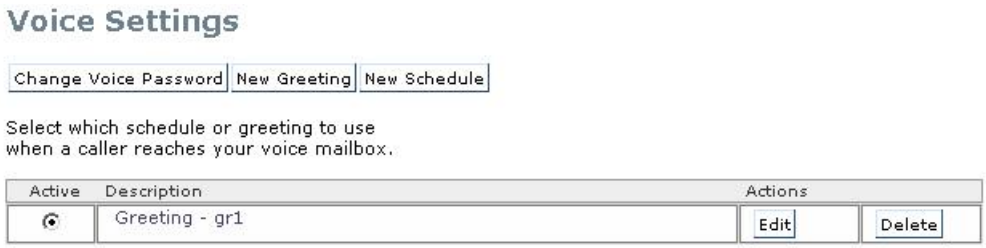
Note With the hyperlink (URL), only users having the right to open the Inbox of the original recipient can access the message. Forwarding the message from the mail client (Lotus Notes, etc.) will not work if the recipient is not a KCS user or does not have the right to open the Inbox of the original recipient. To forward the message to someone without this right, the user must forward the message in TC/Web.

Voice Settings

The Voice Settings tool allows a user to manage their voicemail greetings via the web. A user can create new greetings, edit their settings, and delete greetings. Greetings can either be recorded via a telephone or audio files can be uploaded via the web tool. Weekly schedules can be created, allowing users to choose which greetings should be played at which time of day and on which day of the week.

Changing Voice Password

The Voice Settings tool is available by clicking **Options** > **Voice Settings** in the tool list. A voice password for the current user can be changed by clicking **Change Voice Password**.



Picture 117: Voice settings

In an opened view, the user must enter the old password and the new password twice.

Picture 118: Voice settings

Enhanced Voice Password Check

If the enhanced voice password check is activated, following additional checks are being performed on the entered new password:

- New password must not be the same as the old one
- New password must not match user’s voice or fax extension
- New password must be longer/shorter than configured minimum/maximum voice password length

- New password must fulfill the basic complexity check, following passwords are not allowed:
  - All digits consisting of the same value (like 1111)
  - Digits in increasing or decreasing order with step being 1 (like 1234 or 4321)

Note This feature is by default enabled, please refer to the TC/WEB Installation Manual to see how to disable and configure it.

Greeting and Schedule List

The primary screen presents a list of all of the user's greetings and schedules.

Greetings and schedules can be created, edited and deleted by clicking the appropriate buttons on this screen.

Only one greeting or schedule can be active at a time. A greeting or schedule is made active by clicking on the row in the table. The active item is highlighted.

System Greetings and Schedules

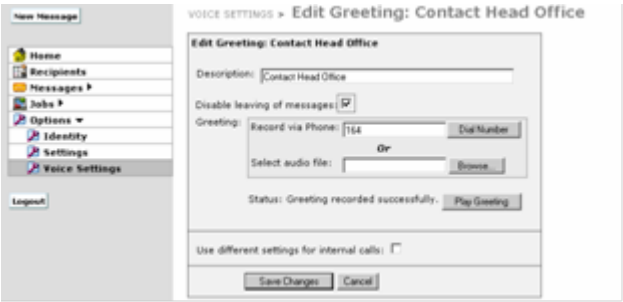
Greetings and schedules in the list that are designated with the word [System] are items that belong to a system profile. These items can be used by the user, but cannot be deleted and the recorded audio greetings cannot be changed.

Creating or Editing a Greeting

Click **New Greeting** or **Edit Greeting** to display a form for editing the properties of the greeting.

A greeting can be configured with several check boxes:

- Disable leaving messages:
  When active, a caller who reaches the user's mailbox will hear the user's greetings, but will not have the opportunity to leave a message.
- Use different settings for internal calls:
  When active, the user can specify different greetings for callers originating within the organization and callers originating from outside the organization.



Picture 119: Greeting editor

Audio greeting:

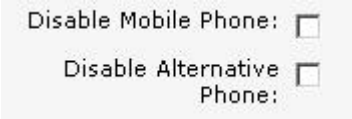
The user has two possibilities for setting the audio greeting that the caller will hear. The greeting either can be recorded by a phone, or be uploaded as standard audio file of type ".wav"

Picture 120: Recording a message

To record via phone, the user enters his/her phone number in the **Record via phone**: field and clicks the **Dial Number** button. The application will then dial the user's phone number and open a new window. When the user picks up his/her phone, the recording functionality will become active. Once the message has been recorded it can be played back immediately.

Disable the Mobile (and Alternative Phone) Number for Some Greeting Profiles

You can disable the mobile phone (and alternative phone) number for some greeting profiles. It can be done from **VoiceSettings** > **Edit Greeting** view in TC/WEB.



Picture 121: Disable a number for greeting

Schedules

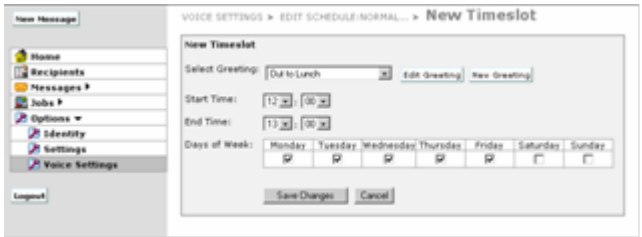
A schedule is a week-long calendar allowing the user to specify when particular greetings should be played. A greeting can be used in more than one schedule.

Greetings are assigned to schedules via timeslots. The different regions visible on a schedule are the timeslots. Clicking on a timeslot activates a context menu enabling a user to edit or delete the timeslot or to edit the associated greeting.

Picture 122: Schedule editor

Creating or Editing a Timeslot

Click **New Timeslot** or **Edit Timeslot** to displayed a form for editing the properties of the timeslot.



Picture 123: Timeslot editor

A timeslot is very simple; it specifies which greeting to play and when to play it.

Which greeting to play is specified with a dropdown menu. Buttons allow you to create a new greeting or edit an existing greeting.

The time to play the greeting is set by choosing the start and end time, and on which days to play it in this time range.

If the greeting should be played at different times on different days, or whether it should be played in the morning and evening, these are two separate timeslots that use the same greeting but have different time settings.

If several timeslots are configured with overlapping time ranges, the timeslot that has started most recently will be used. The schedule accurately displays which timeslot is active.

Note With the hyperlink (URL), only users having the right to open the inbox of the original recipient can access the message.

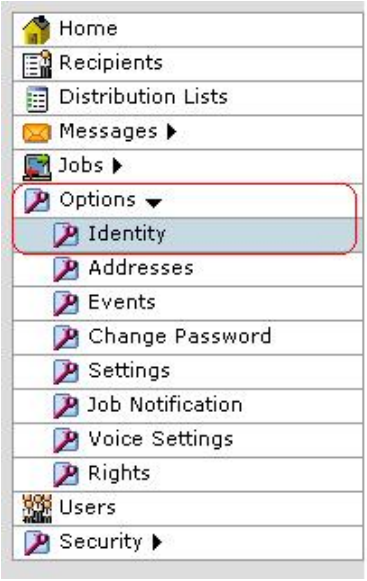
Forwarding the message from the mail client (Lotus Notes, etc.) does not work if the recipient is not a Kofax Communication Server user or does not have the right to open the Inbox of the original recipient. To forward the message to someone without this right, the user must forward the message in TC/Web.

Default Message Template

This section describes the default message template.

Select Default Template

The default message template is the message the users start with when composing a new message. It can contain all the components of a message: cover sheet, recipient list, subject, send options, and message text. It may also be empty. The purpose of having a default template is to save the user's time and trouble of specifying the same message components over and over again.



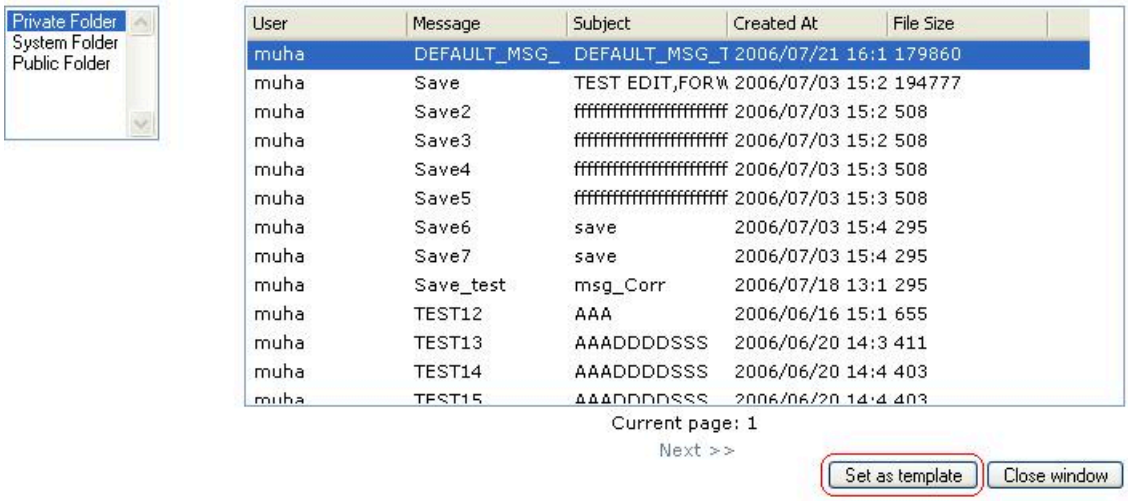
Picture 124: Identity link in main menu

Default templates for existing users can be set by clicking **Options** > **Identity** on the main menu.

The Identity page opens. Click **Set** to select the default template. Select a message from the list; then click Set as template.

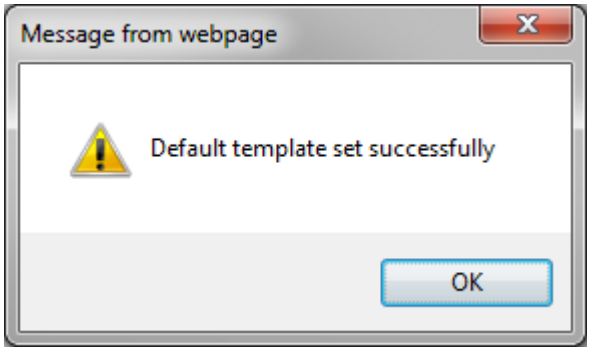
Picture 125: Identity page – set default template

Any document selected by the user will be used as a template for all subsequent messages until the user changes the default again.



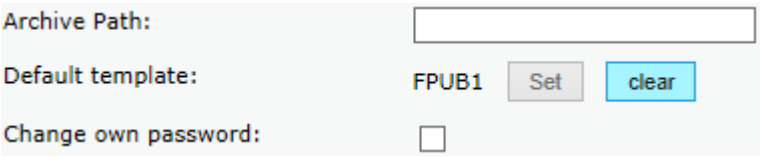
Picture 126: Select default template

A confirmation message is displayed and Identity page will indicate the file name of the current default template.

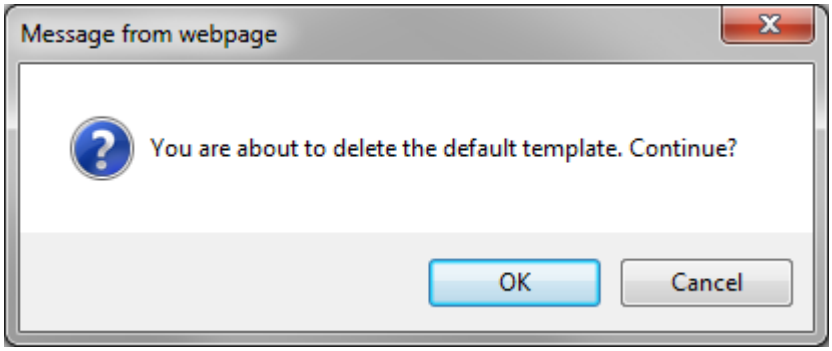


Picture 127: Successful setting of default template

To remove the default template, click Clear on the Identity page.



Picture 128: Identity page – default template is set



Picture 129: Confirm deletion of default template

If the user has administrator rights, he/she can set or remove default templates for other users through the user list on the **'User'** page.

Picture 130: Identity page – default template is cleared

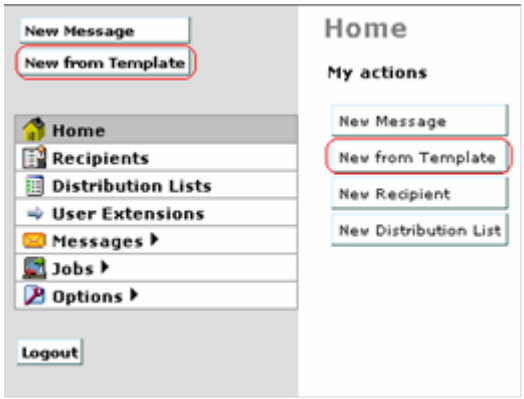
Create New Message from Message Template

The purpose of creating a new message from a template is to save the user's time and trouble of specifying the same message components over and over again. The user can select a template for a single message.

Picture 131: Registry value MessageFromTemplateEnable

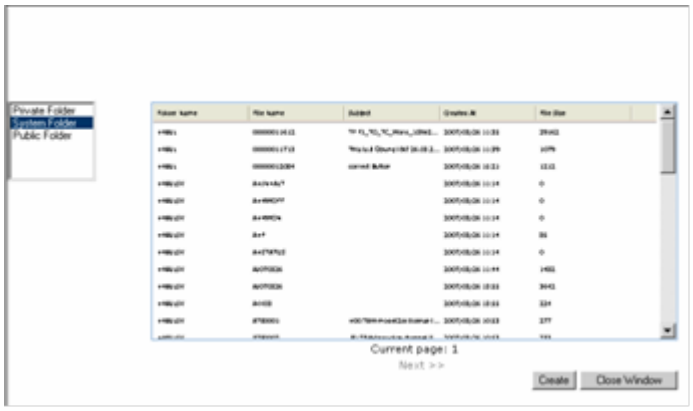
To enable this feature, the registry value MessageFromTemplateEnable must be set to 1. By default, this value is 0.

In the main window there are two New from Template buttons.



Picture 132: New from Template buttons

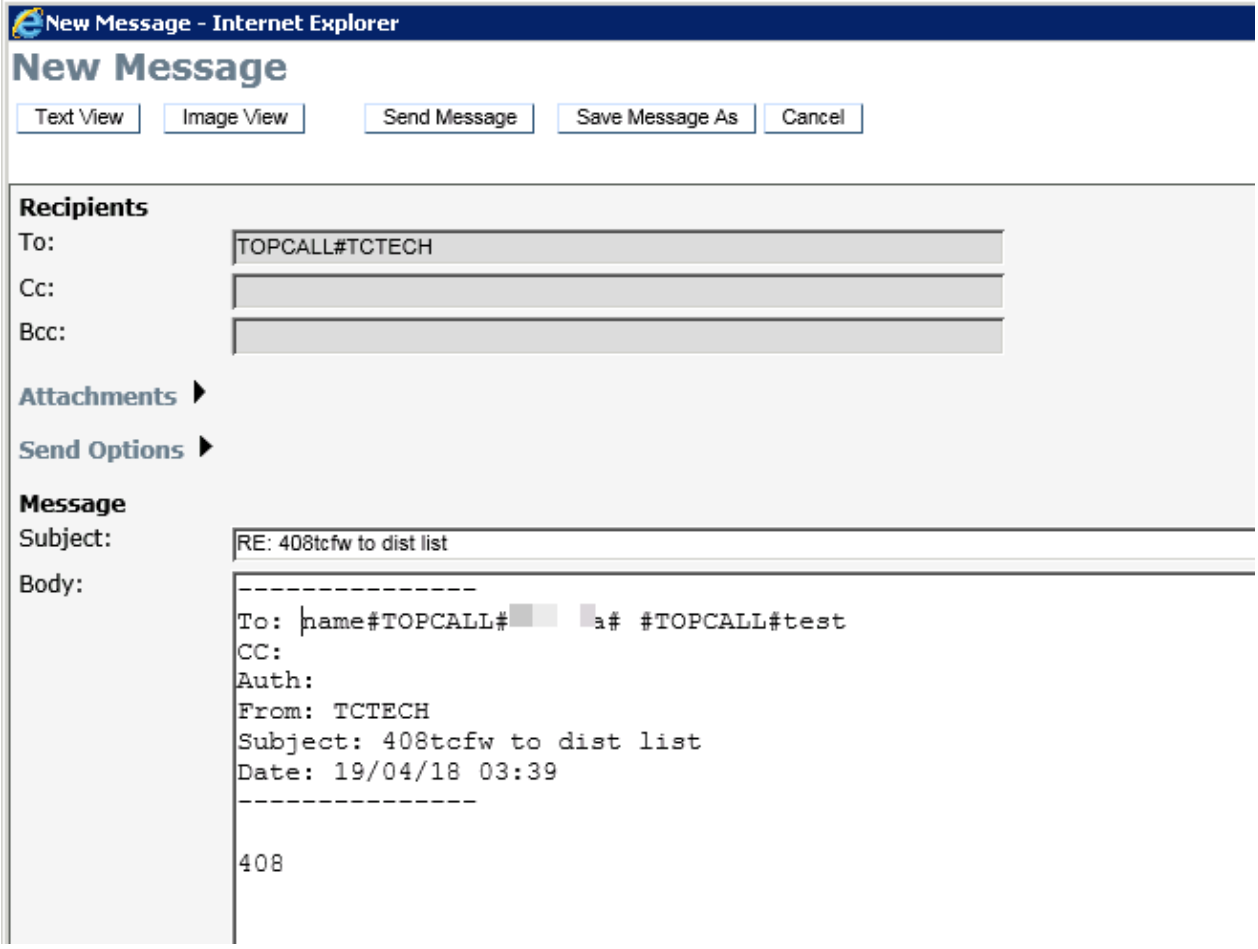
Click New from Template to open a window for creating the message template with a list of messages from the selected message folder.



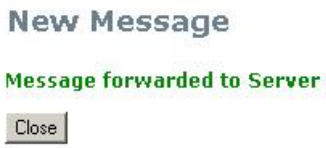
Picture 133: New from Template window

Select a message that is supposed to serve as template, then click Create. A new message is created; its fields are populated with the data taken from the original message.

Change any fields as needed, then click **Send Message**. A confirmation message is displayed.



Picture 134: New Message form with data taken from selected template

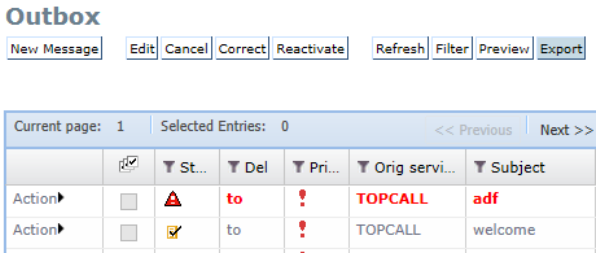


Picture 135: Message forwarded to Server

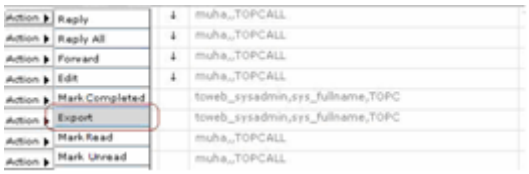
Export Folder View to .CSV File

You can create an ASCII file of a folder view in any directory.

Click Export.

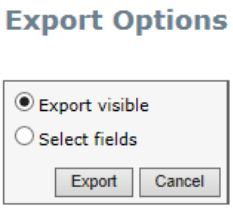


Picture 136: Export button in folder view



Picture 137: Export button in message Action menu

A new window appears with two options:



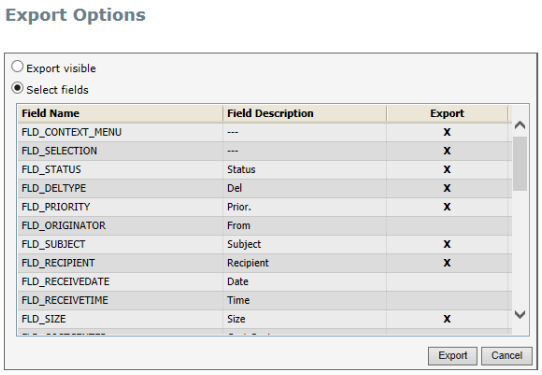
Picture 138: Default view of Export window

- Select **Export visible** to download the columns visible in the current folder view.
- Select **Select fields** to configure which fields should be included in the export file.
  Click **Export** to download the file in comma separated values format (csv).

If you select **Select fields**, a grid with all fields that are available for that folder view is displayed. The grid consists of three columns:

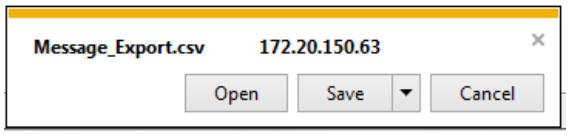
- Field Name
- Field Description

- Export
  In the Export column the user can select or clear fields to be included in the export file.



Picture 139: Export Options window with available folder fields for export

Both export options contain a dialog window with options to save or open the exported file.



Picture 140: Internet Explorer dialog

Change the Originator of a Message

TC/Web offers the possibility to send a message with changed originator/sender. For this feature to be available, the following steps are necessary:

Picture 141: Registry key ‘SendAsUserEnable’

- The user has to be granted the “Change sender” right.
- The registry value SendAsUserEnable must be set to 1. The default value is 0.

If the requirements are met, the New Message window contains an additional field with the name of the originator/sender.

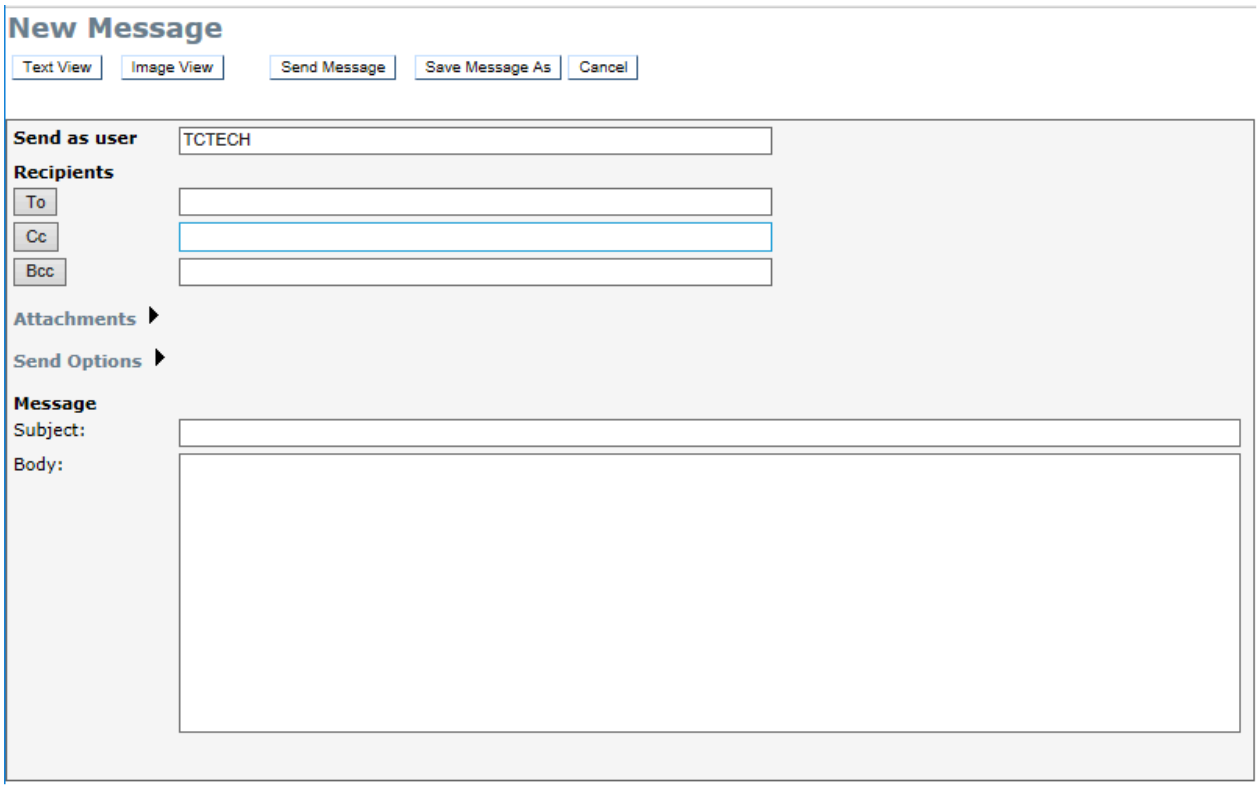
By default, the current user is set as the originator of a message. If a user changes the sender in this field, the message will be sent with this new sender. After clicking Send, a confirmation message is displayed.

In the recipient inbox the message appears with the new originator/sender.

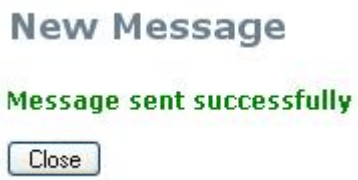
If a user with the right to change the sender has also the right to switch the user, he/she will be able to change the sender/originator of a new message while switched to some other user. The **New Message** window will change. The list of possible senders now contains:

- Original username
- Switched-to username
- Other User

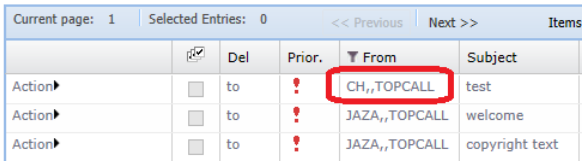
If the requirements are met, the **New Message** window contains an additional field with the name of the originator/sender.



Picture 142: Create new message with right to change sender

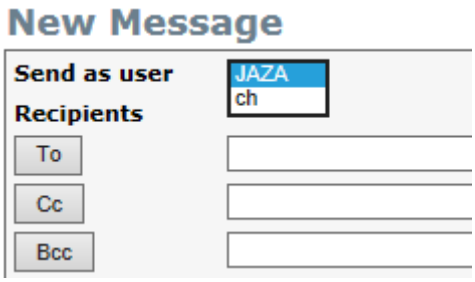


Picture 143: Message sent successfully



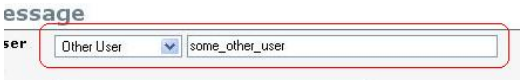
Picture 144: Recipient inbox

Other User allows sending a message with a third sender other than the **switched-to user** or the **original user**. If it is selected, a new textbox will appear, in which the user has to enter the name of the sender/originator.



Picture 145: User with right to change sender creates new message with switched-to user

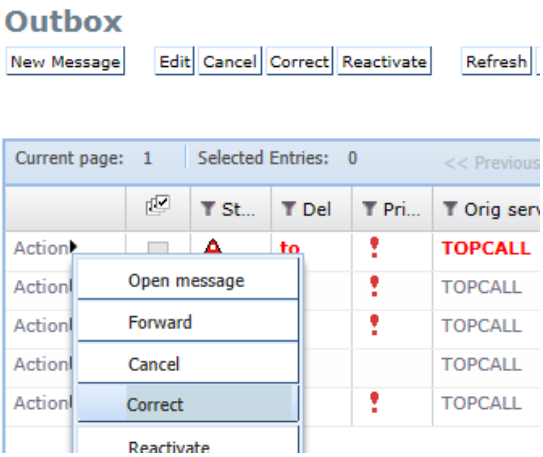
Again, a confirmation message is displayed after sending the message.



Picture 146: Switched-to user selects other user from combo box

Correct Recipients of Message in the Outbox and Resend It

With this command you can correct the delivery address of a message or message send options in the Outbox.



Picture 147: Correct buttons on Outbox window

First, open the Outbox. There are two options for correcting a message.

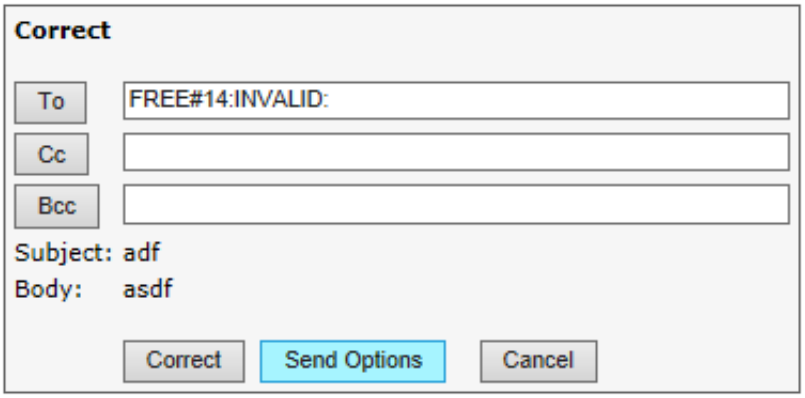
- First option: Mark the message to correct. Then click **Correct**.
- Second option: Click **Action** to open the Action menu. Then click **Correct**.

  The correction page opens immediately. You can add or remove recipients or change the send options of the selected message.

Modify Send Options of Message

To change the send options of a message, click **Send Options**. A new window displays the current send attributes of the message. These options are identical to the send options of any new message.

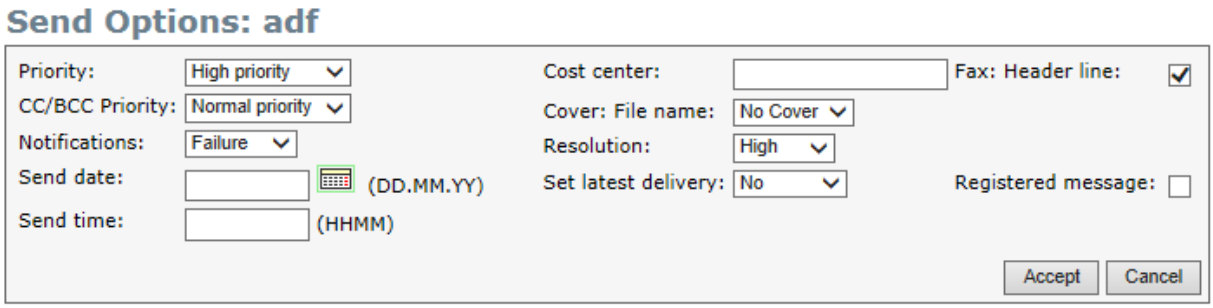
Note For a user, Send Options are available only when the `SendFormOptionsEnable` registry key is set to 1.



Picture 148: Send Options button

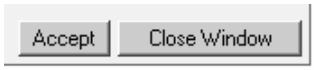
Here you can change

- Priority
- CC/BCC priority
- Notifications
- Send date
- Send time
- Cover file name
- Resolution
- Latest delivery



Picture 149: Send options window

To make the changes permanent, click **Accept**; then click **Correct**. If the correction is successful, you receive a confirmation message.

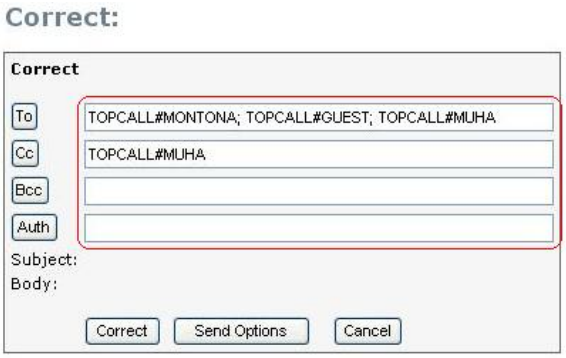


Picture 150: Accept changes button

Picture 151: Correction successful

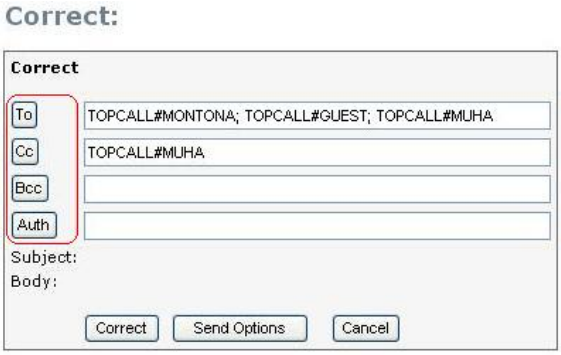
Change Recipients of Message

The user can change recipients directly in the correction page by entering address(es) in the corresponding textbox for that recipient type. To remove a recipient, the user can simply delete it from the textbox.



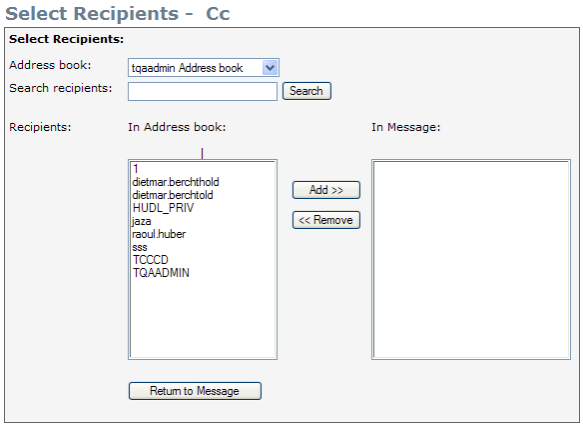
Picture 152: Recipients fields

There is also an option to select recipients from an address book, which can be accessed by clicking one of the recipient type buttons. On the subsequent Select Recipients page, recipients can be added to or removed from existing recipient lists. This process is identical to the recipient selection for a completely new message. To return to the correction page click **Return to Message**. The new recipient list will be displayed in the corresponding text box.



Picture 153: Recipients buttons

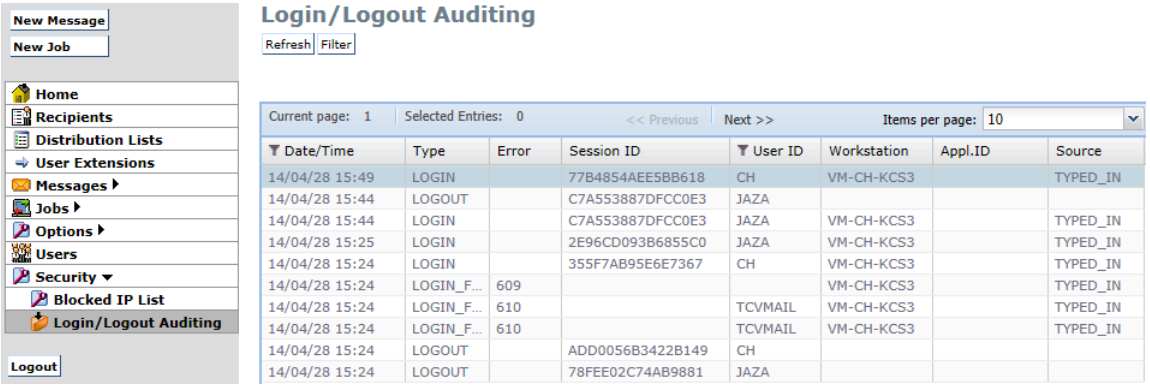
To make changes permanent, the user needs to click **Correct**. If correction is successful, the user will receive a confirmation message.



Picture 154: Add/remove recipients page

Login/Logout Auditing

Click **Login/Logout Auditing** on the Security menu to access the TCOSS feature for auditing logins and logouts.



Picture 155: Login/Logout Auditing

The following actions can be audited:

- Successful login
- Failed login
- Logout

The following properties of each audit log are displayed:

- Date/Time
- Type (LOGIN, LOGIN_FAILED, LOGOUT)
- Error (TCSI Error code in the case of failed login)
- SessionID

- UserID (The user who performed login/logout)
- Workstation (name of workstation if available)
- Appl.ID (Application if available)
- Type (UserID source: TYPED_IN or LAN_ID)

  There is a possibility to filter for certain user and date/time period.

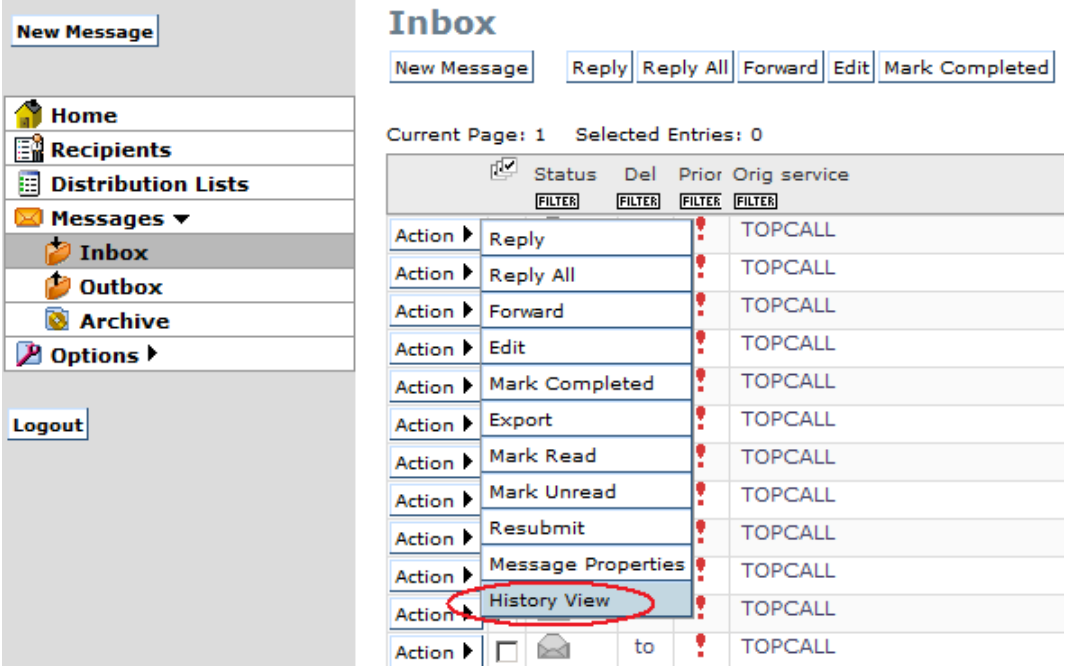
Note Because the information is coming from the archive, there can be a delay before the most recent audit logs are displayed.

Message History View Through Action Context Menu

There are two possibilities how to inspect the history of a particular message.

The first is the standard history view invoked via opening the message and clicking History View (for details see History View).

Second one is the History View in the Action Context Menu in the particular tool (Inbox, Outbox, Archive, Public, System, …). This is especially interesting for system administrators, who have to inspect the message history but are not authorized to open/view the message itself:



Picture 156: History View Context Menu

- Click on the **Action** > **History View**
- New windows with the history entries will be displayed

History View | Filter | Page Down | Page Up

Date	Time	From	Action	Recipient	Original time
08-12-05	14:27	BR3	open		
08-12-04	16:50	BR3	update		
08-12-04	16:50	BR3	update		
08-12-04	16:49	BR3FullName	displayed		
08-12-04	16:49	BR3	update		
08-12-04	16:49	BR3FullName	displayed		
08-12-04	16:49	BR3	update		
08-12-04	16:49	BR3	open		
08-12-04	16:49	BR3	open		
08-12-04	13:48	BR	open		
08-12-03	12:27	BR2,Fullname BR	sent	BR3,BR3FullName,TOPCALL	

Picture 157: Message History Window

Note For information how to enable this feature please refer to the “TC/WEB installation manual”.

Delete Archived Messages

You can use this feature to delete archived messages. Delete Message feature is only available in user interface if following conditions are true:

- The delete function must be enabled using the TC/Archive registry key UpdateLog\EnableDelete. The value of this key must be greater than zero when the last time TC/Archive was started and greater than 1 when the delete request occurs.
- User must have **Archive delete** right assigned in KCS Portal.

1. To delete archive messages, select the required messages to delete and click the **Delete** button. Alternatively, to delete a single message, click **Action** icon of the message to delete and select the **Delete** button from the context menu.

   Note
   - For a message with multiple entries, deleting any one entry also deletes the message content. Other entries may still appear in search, but you cannot open the related message.
   - Volumes (regular or index) are not changed by delete operations.

2. Click **Refresh**.

Chapter 4

User Administration

A User Administrator is a user with the rights to manage other KCS users. The administrator is in charge of maintaining the Kofax Communication Server user profiles. Each KCS system has a set of user profiles, defining the rights of all users. Several features can be enabled for a User Administrator, such as a list of users, the ability to change a user's password, and the ability to "UserSwitch" to another user.

A User Administrator can be configured as a System User Administrator or a Group User Administrator.

- **System User Administrator**
  Can manage all users on a KCS server.
- **Group User Administrator**
  Can only manage other users in the same group as the Administrator.

The user Administration features are described below.

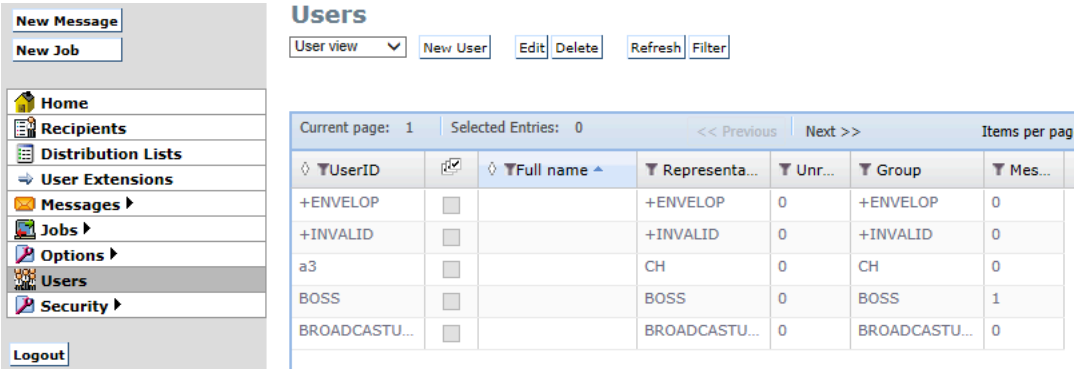
User Tool

The User tool presents a list of all administrable users.

Clicking on a user in the list opens the Identity tool for this user. This is the same tool that a user can access via **Options** > **Identity** in the toolbar.

Which fields are visible in the Identity tool can be configured by the system administrator.

From the Identity tool, a user administrator can access the Addresses tool, the Events tool, and the Rights tool of a user via tabs.



Picture 158: Users

The users' list contains two columns:

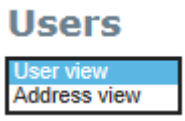
- The **Unread** column contains information about a number of unread messages in a user's inbox.
- The **Messages** column contains information about a number of messages in user's inbox.

Unread	Messages
0	1
4	4
0	0
0	0
3	6

Picture 159: Unread messages and total messages

Address View

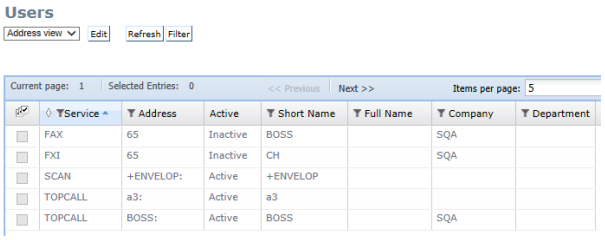
By default, the users' tool is opened in User view, and contains a list of administrable users. It is possible to switch between **User view** and **Address view**, by selecting the option from a drop down list.



Picture 160: Drop down list to switch between views

Address view is the combination of all active and inactive addresses specified for a KCS user. The view allows filtering on service and address, allowing only a specific set of users to be listed.

As a user profile may contain multiple addresses, multiple entries in the Address view list may point to the same user profile.

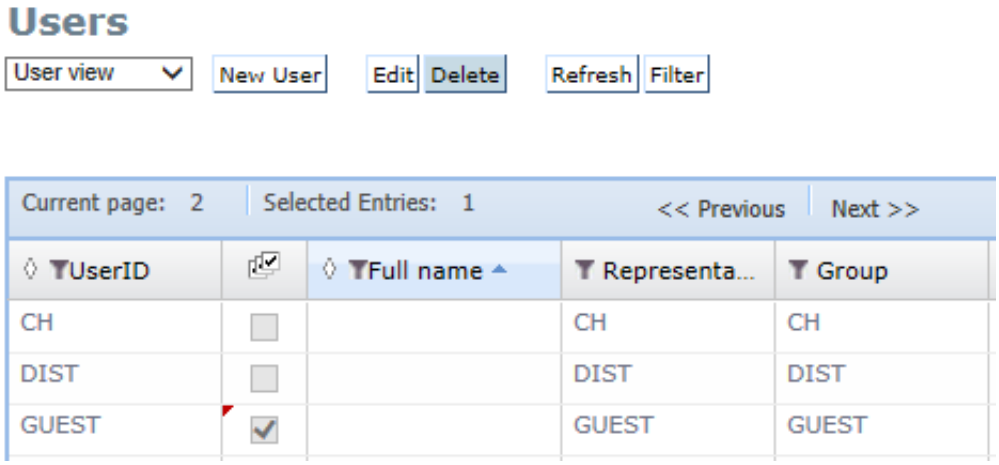


Picture 161: Address list

User Deletion

To delete a user or a number of users, select the corresponding user(s) and click Delete.

TC/Web asks for a confirmation before deletion.



Picture 162: Delete user button

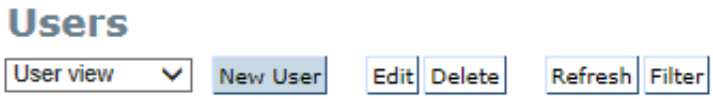
New User Creation

Click New User to open the New User Tool.

When creating a new user, all information can be entered manually or a template for the new user can be chosen.

A user template is a user whose userID ends with '_TEMPLATE' (this ending is case insensitive). It is possible to have more than one template. If the user has the right to administrate only group users, only templates of the current user group will be displayed. Otherwise (e.g., for a system administrator), all templates will be displayed. If no template is stored, the drop-down list will not be shown.

Note In order to be accessible for the Group Administrator, a template must be in the same group as the Group Administrator.



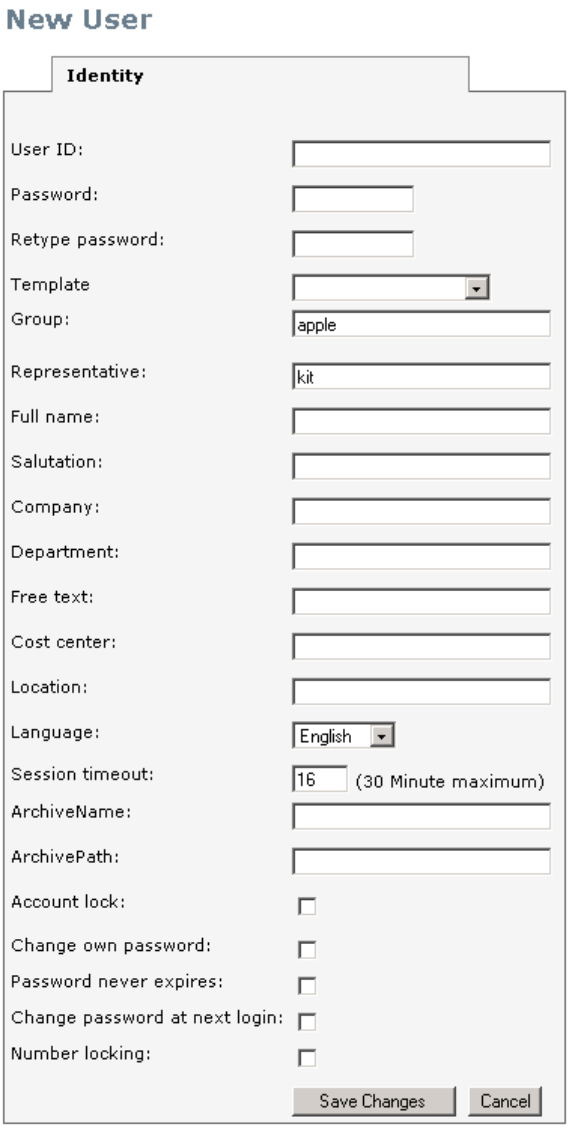
Picture 163: New User button

When creating a new user, you must fill out the 'Identity' tab, and after saving the new user, you can edit addresses, events and rights.

In order to create new users, you must be either Group Admin or System Admin and have the right to write to 'Group User Profiles' or to write to 'System User profiles'.

Note After saving a new user, when the template is selected, all settings except addresses will be copied from the template. An active address for the service TOPCALL with an ID equal to the userID will be created. The password will not be copied and stays empty.

Note When editing a user, you must save every tab (Identity, Address, Events, Rights) separately before switching to another tab.



Picture 164: New user creation

User Rights

It is also possible to change the security rights for a user via the **Rights tool**. In order to edit user rights, you must switch to the **Rights** tab.

Picture 165: Rights tab

After choosing this tab, you can view and edit different user rights. These rights are combined in different groups as in TCfW. (For rights descriptions, see the *Kofax Communication Server Administrator's Manual*.)

Identity | Addresses

Rights | TC/Web Identity | Broadcast | Navigation | Optior

No Access [?] Read [?] Write [?]

FIS folder [?]
Message folder [?]
Group Message Folder [?]
System folder [?]
System address book [?]
User address book [?]
All priv. AB [?]
Group address book [?]
Group user profiles [?]
System user profiles [?]

FIS prefix [?]

- [x] Tech user [?]
- [x] Server [?]
- [x] Services [?]
- [ ] Change sender [?]
- [x] Reporting [?]
- [x] Metamail [?]
- [x] LAN login [?]
- [ ] Terminate incoming [?]
- [x] Change cost center [?]
- [x] Extended folder view [?]
- [x] Preferences [?]
- [x] May Mark Complete [?]
- [x] Modify cover sheets [?]
- [ ] May use as role [?]
- [x] Enter number directly [?]
- [ ] Reject all messages [?]
- [ ] Dirsync allowed [?]
- [ ] Logging of all send attempts [?]

User belongs to [?] TOPCALL

Picture 166: User rights editing

You can switch to any tab of this sub-tabs control and change any rights. If you want to save changes made to the rights you must click the ‘Save Changes’ button. If you switch to ‘Identity’, ‘Address’ or ‘Events’ tab before clicking the ‘Save Changes’ button, you will lose your changes.

If saving of new right values was successful, you will receive an “Edit successful.” message.

Note If there is a [?] link near caption, it is possible to show a hint shortly describing a right, by clicking on question mark link.

FIS Folder, FIS Prefix

The FIS Folder check boxes define access authorization to the Fax Information System (FIS folder). The FIS Prefix field defines the permanent search criteria for the FIS folder's Message Name field. Users may not change this value. Users with Write privileges can store new documents to or change existing ones in the FIS folder.

Own Message Folder

Defines access authorization to the user's Own Message Folder on the Kofax Communication Server Server.

Group Message Folder

Defines access authorization to the user’s Group User Message Folder on the Kofax Communication Server Server.

Note This right is not available in TCfW.

System Folder

Defines access authorization to the System Folder on the Kofax Communication Server Server. Only users with the TECH USER check box activated can see all the files on the KCS.

System Address Book

Defines access authorization to the System Address Book. It should be set to both, Read and Write, for Administrators and Distributors. For the standard user it is recommended that this be set to Read only.

User Address Book

Defines access authorization to the user's address book. You should set this to both Read and Write.

All Priv. Address Books

Defines access authorization to the private address book of all users. A system administrator who must maintain the private address books of all users must have the Read and the Write checkbox checked. For standard users, it is recommended to leave the Read and the Write check box unchecked.

Group Address Book

Defines access authorization to the user's group address book. You should set this to both Read and Write.

Group User Profiles

Defines access authorization to the group user profiles for creating and modifying users.

System User Profiles

Defines access authorization to all user profiles for creating and modifying users.

Tech User

Permits the highest level of system access. Lets the user view all the fields of the Inbox and Outbox lists and permits access to all system files on Kofax Communication Server. In addition, users with Tech User status can read and write to folders starting with a plus “+” sign (+TECH).

Server

Defines authorization access to the Kofax Communication Server for maintenance and statistics in TCfW. Server windows include Lines / Statistics, Disk Usage, Number Series, Date / Time, Backup / Restore, Registration and License.

Services

Defines access authorization to the Services window in TCfW.

Change Sender

Users having this right set are able to send with any sender.

Reporting

User having this right can request a report. TC/Report checks this right.

Metamail

Metamail is an additional feature to save storage capacity on linked mail systems (Novell GroupWise, Lotus Notes, MS Exchange). If this user right is set and Metamail is installed, attachments are replaced by an URL.

LAN Login

Grants the user the authorization to use the same user ID and password he has on the LAN for automatic login to Kofax Communication Server, and to change the LAN login check box in the login window.

Note In this case, the user’s password is not checked on the Kofax Communication Server.

Terminate Incoming

If set, the user's incoming messages will be automatically terminated when he/she opens them from the Inbox. (Currently it works only in TCfW.)

Change Cost Center

When activated, the user can change the cost center.

Registration / License

Defines access to the Registration and License windows in TCfW.

Extended folder view

When activated, most entry fields in the user’s inbox, outbox, and message folder are displayed. This right should only be granted to special users, such as Distributor or TECH user.

Preferences

If selected, the user has access to the TCfW Common Preferences menu.

May Mark Complete

If selected, user has the right mark incoming messages as complete. This right is granted by default. If you want to prevent a user from marking messages complete, clear this checkbox.

May use as role

If selected, a user can grants other users the permission to impersonate his account without revealing his password. Other users can assign this user as a role in their profile.

Enter number directly

If selected, a user can enter any text in the To/Cc/Bcc field. If clear, user must select recipients from the address book.

Reject all messages

By selecting this check box, all incoming messages will be rejected. The handling is the same as with negative termination, non-delivery notifications and archive entries are generated as requested.

DirSync Allowed

If DirSync Allowed is checked, TC/LINK automatically modifies the User-ID according to changes in the mail client's user profile.

Logging of All Send Attempts

TCOSS may now log all attempts to send a message in the short-term archive (with previous releases only the final send attempt was logged). This means for example, that for a fax line all cases where the distant subscriber was busy or not reachable for some other reason are now documented in the short term archive. This flag controls the logging of all send attempts in the short-term archive.

User Belongs To

The list box User Belongs To specifies for which mail product the DirSync process is done. Available mail products are TOPCALL, MS Mail, cc:Mail, Lotus Notes, HP Open Mail, Host, TCFI, MS Exchange, GroupWise, IBM MQSeries,SAP/R3 via TC/LINK-SC,SAP/R3 via TC/LINK-AC, Internet, SMS and X.400.

If you insert TOPCALL here, it means that the user is a pure Kofax Communication Server user and no DirSync is allowed.

Navigation Settings

The Navigation property page is used to customize the appearance of the TC/Web application per user.

Picture 167: Navigation tab

The values can have one of three states:

State	Result
Show	The tool is visible
Hide	The tool is hidden
Default from Registry	Use default server settings of TC/WEB taken from Registry for that tool

Default value for Public folder, Private Folder, System Folder is “Show”, for other items is “Default from Registry”.

TC/Web Identity Rights

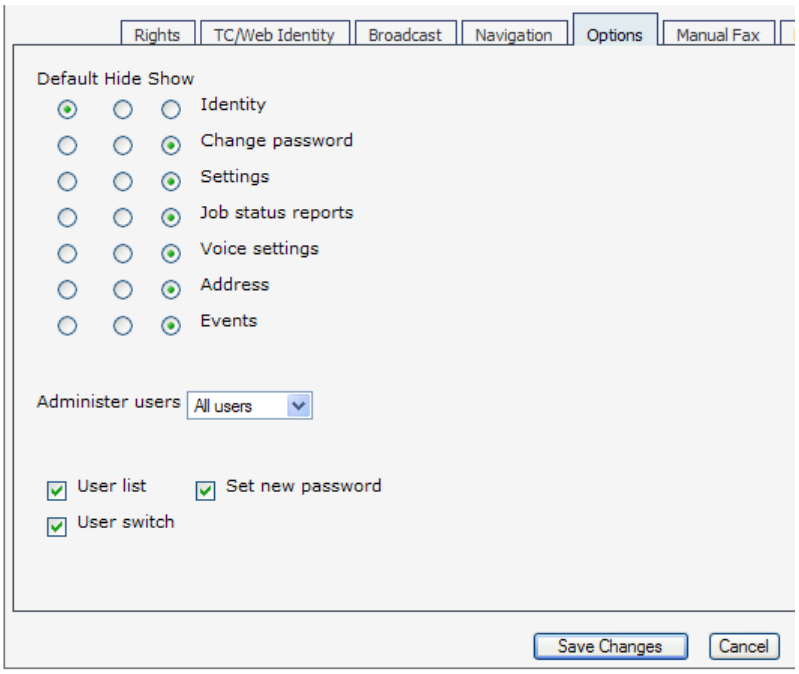
The "Identity" tool in TC/Web allows the access to the data of the user. Users can modify their own data via TC/Web. System Administrators (helpdesk administrators) and Group Administrators (customer administrators) can modify the data of other users.

A System Administrator (helpdesk administrator) has the ability to administer all of the users from all of the customers of an xSP.

A Group Administrator (customer administrator) has most of the abilities of the helpdesk administrator, but can only administer the users of one customer, the users that they are responsible for.

Options

The TC/Web property page is used to customize the appearance of the TC/Web application per user.



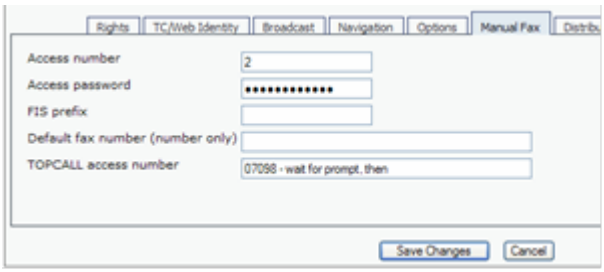
Picture 168: Options tab

The values can have one of three states:

State	Result
Show	The tool is visible
Hide	The tool is hidden
Default	Use default server settings of TC/Web for that tool

Manual Fax Settings

This tab defines the fax settings for the selected user.



Picture 169: Manual fax settings tab

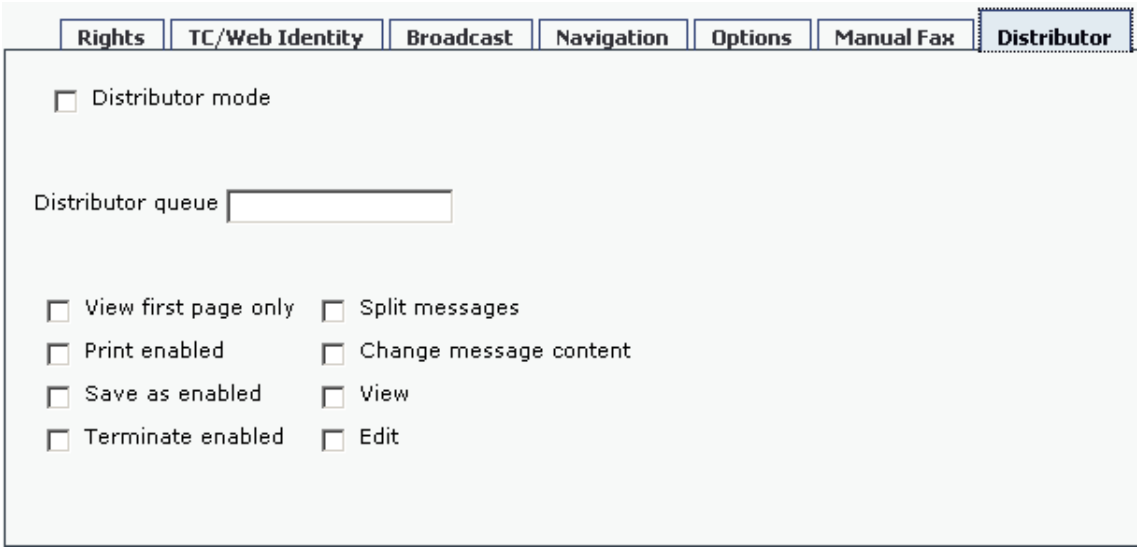
- **Access number** identifies the user. This PIN code, together with the number and the TOPCALL access number, enables fax machines to be used as scanners
- **Access password** is used for additional security when scanning documents or retrieving FIS documents remotely.
- **FIS prefix** sets the prefix value for the FIS folder Select Criteria.
- **Default fax number** is the number at which the user receives all messages and notifications.
- **TOPCALL access number** is number that the user needs to access the KCS Server

Distributor Settings

The Distributor tab defines whether distribution is activated, the distribution queue, and various Distributor rights for a selected user.

- **Distributor mode** enables or disables the Distributor mode.
- **Distributor queue** specifies which KCS queue will be searched for messages to be distributed. Leave blank to use the default KCS queue DIST.
- **View first page only** prevents the distributor from viewing any pages of a message other than the first page.
- **Print enabled** grants the user the right to print messages on any printer.
- **Save as enabled** grants the user the right to save messages to any folder.
- **Terminate enabled** grants the user the right to terminate incoming messages.
- **Split message** grants the user the right to split incoming messages.
- **Change message content** grants the user the right to change the content of the message.
- **Edit/View key system** fields grants the user the right to edit/view the banking key system fields.

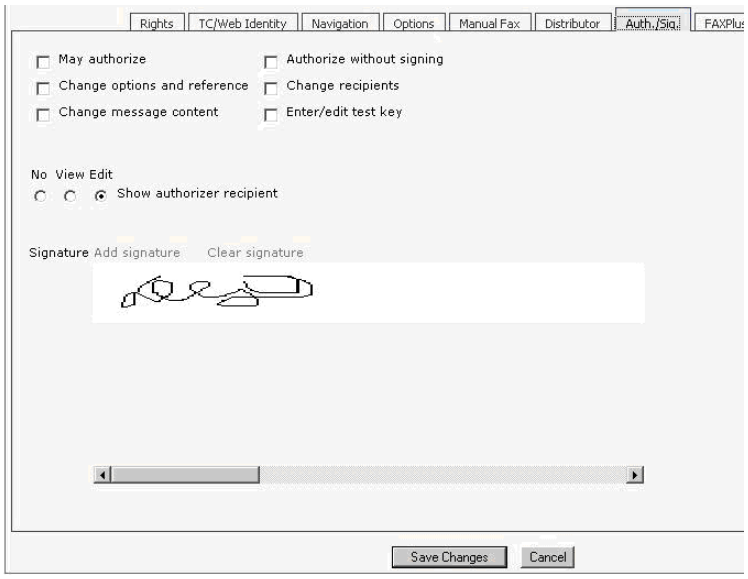
  Changes will not be accepted unless **Save Changes** is clicked.



Picture 170: Distributor settings

Authorize/Signature Settings

The Administrator can add a signature to a specified user and also clear a user's signature.



Picture 171: Authorize/Signature page on the Rights tab

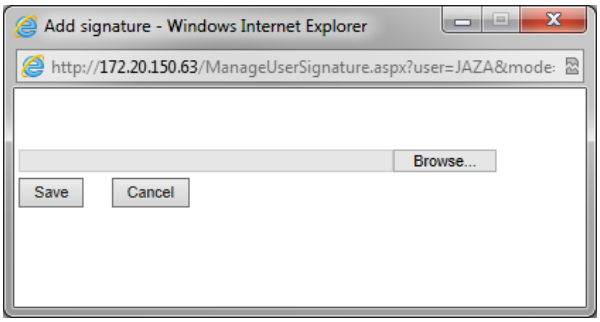
- **May authorize**: Grants the user the right to authorize messages for sending
- **Change options and reference**: The user may change all send options and the reference field (only in TCfW).
- **Change message content**: The user may change the contents of the message (only in TCfW).
- **Authorize without signing**: This specifies that the signature of the authorizer does not have to be included for the message to be authorized.

> **Note** Please make sure that 'May authorize' user right is granted to be able to authorize a message at all.

- **Change recipients**: The user may change the recipient list (only in TCfW).
- **Enter / edit test key**: Grants the user the right to enter or edit the test key. Each user can enter a test key mark, but he/she can never enter the test key itself or view it. A test key can only be entered by the user receiving the message for authorization. Any user in the authorization chain without this right cannot view or change the test key, regardless of his/her Change message content right. (only in TCfW).

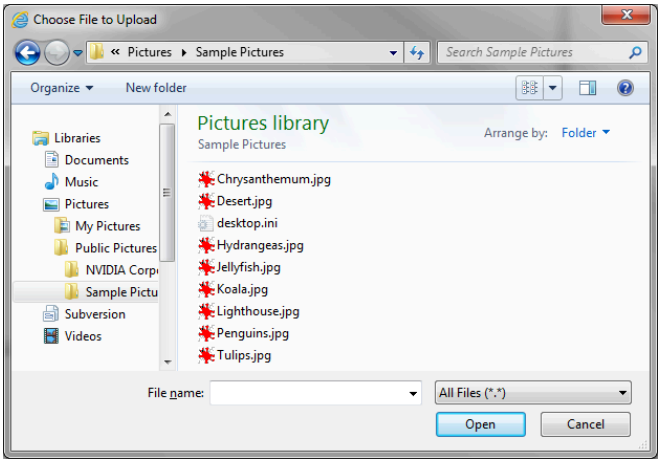
Adding signature

1. Click Add signature.
   The “Add signature” window is displayed:
   - Save button – save signature
   - Cancel button – close the form without saving
   - Browse button – open browse folder dialog box
   - Signature path text box



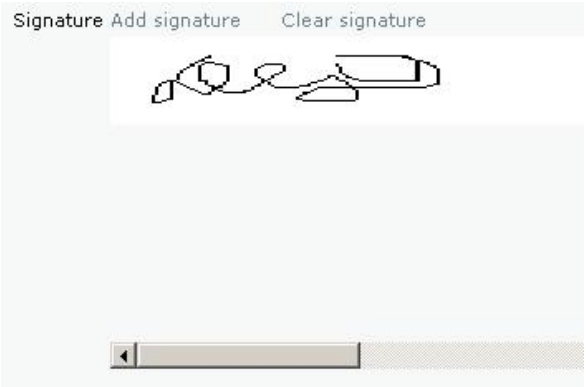
Picture 172: Add signature form

2. Click Browse.
3. Select the signature and click Open.



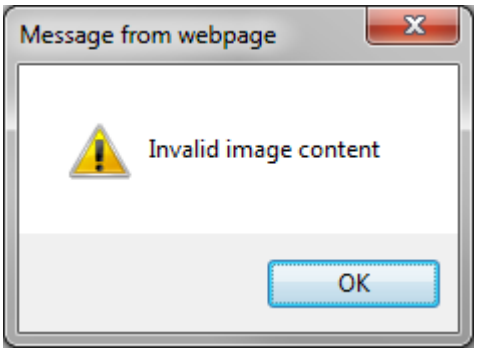
Picture 173: Browse folders dialog box

4. Click Save. If the picture is valid, the “Add signature” window is closed and the signature is inserted in the signature box on the main Authorize page.



Picture 174: Signature(picture) box

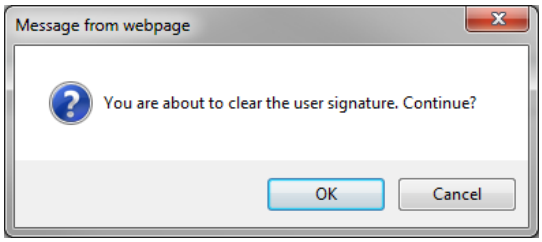
Otherwise, if the picture is not valid you receive an error message.



Picture 175: „Unsupported file format“ message

Clearing signature

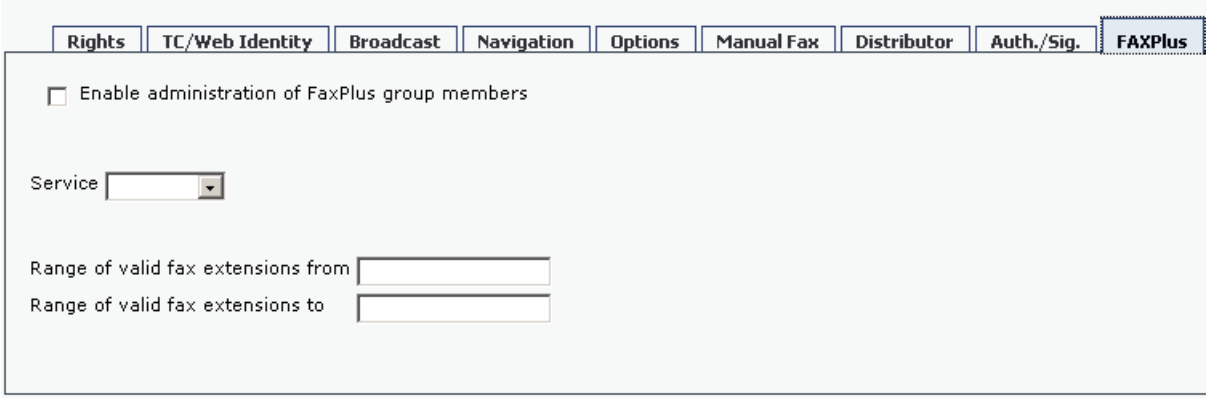
To clear your signature, click Clear signature, then click OK in the confirmation window.



Picture 176: Confirm „Clear signature“ dialog box

FaxPlus Settings (User Extensions)

The FaxPlus tab contains settings for a given group of users (they all share the same group name) to specify a range of numbers, which can later be allocated to users, within the same group, by a FaxPlus administrator. The range is administrated within the UserExtensions tool.



Picture 177: FaxPlus settings

The Services drop-down list specifies the service to be used for the range.

The range (specified in the "Range of valid fax extensions from/to" fields) can be any range of ascending numeric characters. When the range fields are left blank, the admin can specify any free address for the user and no limiting range is going to be used.

Please read the chapter "EXTENDED FEATURES – User Extensions" for more information.

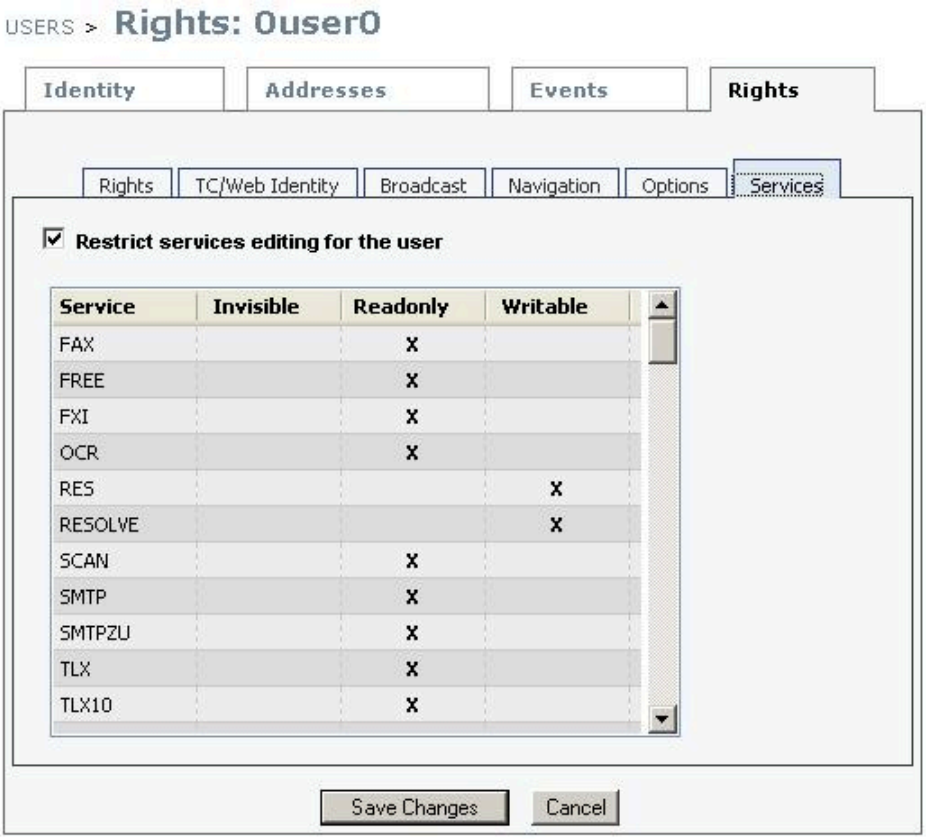
To promote a normal FaxPlus user to a FaxPlus administrator, just check the "Enable administration of FaxPlus group members" box.

Services Rights

It is possible to configure in TC/Web the services that can be viewed or edited by the user on the ‘Addresses’ or ‘Events’ tabs. There are 3 possible states for each service:

- Invisible for the user
- Visible for the user, but read-only
- Service visible and editable for the user

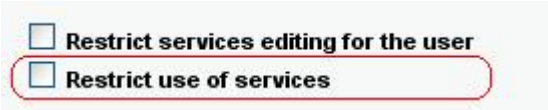
This feature is accessible from the Services sub-tab at the Rights tab. An access for the service can be changed by clicking in the corresponding access type column opposite the service name.



Picture 178: Services rights

Restricted Services User Configuration

TC/Web offers the possibility to restrict the use of services for each user. On the Rights tab there is the '**Restrict use of services**' check box.



Picture 179: Restricted use of services check box on user Rights tab

If this check box is selected, each of the user's services must be marked separately with one of the two settings described below. If checked, all services are automatically reset to Authorization needed.

☐ Restrict services editing for the user

☑ Restrict use of services

Service	Authorization	Use without	
FAX	X		
FREE	X		
FXI	X		
PRI	X		
SCAN	X		
SMTP		X	
TLX	X		
TOPCALL		X	
TTX	X		
VOICE_K2	X		
VOICE_K3	X		

Picture 180: Restricted use of services grid

- Authorization: The user cannot immediately use the service, but can specify recipients with this service and send messages to an authorizing user for authorization. The authorizing user must have proper authorization; otherwise he/she can only reject messages.
- Use without: The service can be used immediately for sending. No sending authorization required.

Each user must have at least the service used for internal sending set to **Use without restriction** in order to be able to send a message to an authorizer.

If a user with restricted authorization writes a message to a recipient who can be reached through several services, all services for which the user has no rights will be deactivated automatically. If there is no active address left, the recipient entry in the recipient list will appear in square brackets and the message will not be sent.

To allow users to use a service, this service has to be marked in the service list with either ‘Authorization’ or ‘Use without’.

If a new service is added later it will not automatically become part of the service list in the user profiles. Each user profile must be edited separately to grant users with restricted use of services the right to use this new service.

Changes that are made will not be saved until the user clicks the **Save Changes** button.

Edit successful.

Picture 181: Restricted use of services successfully set

User Switching

The UserSwitch feature enables a user administrator to view and edit the data of another TC/Web user. When an administrator has switched to another user, the Administrator still has access to the same tools, but the data displayed in some of the tools is that of the user they have switched to.

Switching

- A user administrator with user switching enabled has a user switching form located at the top right of the screen.
- To switch to another user, the user administrator must enter the user name of the user. In a service provider environment with multiple servers, a system user administrator must also enter the customer of the user.

Note The user administrator is still logged in after switching to another user. Also, when the user is switched, the language remains the same.

Functionality While User-Switched

When an administrator switches to another user, the top of the screen displays the UserID of the current user and of the switched user. A system administrator can also configure that the company and full name of the switched user is displayed. Some tools will show the data of the switched user. This is accomplished by filtering the data with the UserID of the switched user. Following is a description of what the user administrators see and what they can do when they are switched to another user and they open the tools.

Open Jobs – shows switched user data

- Possible to change filter to view Group data.
- Can edit job data
- Not possible to send a job as switched user.
  Any new jobs sent while user switched will be sent with the User Administrator as the sender.

Problem Job Items – all problem jobs on current KCS server instance.

- Problem jobs are only visible to System User Administrators

Completed Jobs – shows switched user data.

- Possible to change filter to view Group data.

Distribution Lists – shows switched user data.

- Can view Personal/Group/System address book of switched user.
- Can view and edit distribution lists entries.
- Can create TC/Broadcast fax OCR cover sheet for switched user

Recipients – shows switched user data.

- Can view Personal/Group/System address book of switched user.
- Can view and edit recipient entries.

User Extensions – shows switched user data

- Can edit DID numbers as the switched user normally would.

Options: Identity – shows switched user data.

- Can edit.
- Which fields are visible to a System or Group User Administrator is configurable.

Options: Addresses – shows switched user data.

- Can edit.
- Whether the tool is available to System or Group User Administrator is configurable.

Options: Events – shows switched user data.

- Can edit.
- Whether the tool is available to System or Group User Administrator is configurable.
- Which fields are visible to a System or Group User Administrator is configurable.

Options: Change Password

- Can change the password of the switched user.
  (User Administrator must have Change Password right.)

Options: Settings – shows switched user data.

- Can edit.

Options: Notifications – shows switched user data.

- Can edit.

Inbox, Outbox, Public, Private, System, Archive - shows data of User Administrator.

- The data displayed in these message tools is not changed when a user is switched.

New Message and New Job.

- Whether group or system administrators can send a Job or Message while switched can be configured.
- Whether group or system administrators can send As the Switched User while switched can be configured.

UserSwitch Functionality Matrix

The following matrix indicates which data a User Administrator sees when user switched.

- **own user** data of the currently logged in user
- **own group** data of the group of the currently logged in user
- **switched user** data of the user that was switched to
- **switched group** data of the group of the user that was switched to
- **server** data from all of the user on the Kofax Communication Server server instance that the user is currently logged in to
- **NOT ACCESSIBLE** tool is not viewable

	System User Administrator	Group User Administrator
Users	switched group	own group

	System User Administrator	Group User Administrator
User Extensions	switched user	switched user
Address book - personal	switched user	switched user
Address book - group	switched group	own group
Address book - system	server	NOT ACCESSIBLE
Distribution Lists -personal	switched user	switched user
Distribution Lists -group	switched group	own group
Distribution Lists -system	server	NOT ACCESSIBLE
Active Jobs	switched user - can change filter to view all in switched group	switched user - can change filter to view all in switched group
Problem Jobs	switched user - can change filter to view all in switched group	NOT ACCESSIBLE
Terminated Jobs	switched user - can change filter to view all in switched group	switched user - can change filter to view all in switched group
Inbox	own user	own user
Outbox	own user	own user
Archive	own user	own user
Public	server	server
Private	own user	own user
System	server	server

Change Other User's Password

The user administrator can change the password of another user by switching to that user and using the standard **Options** > **Change Password** tool.

The user administrator will not have to enter the old password in order to change the password.

The user administrator must still enter their own old password to change their own password.

Assigning User as a Role to Another User

Using this feature, a user can grants other users the permission to impersonate his account without revealing his password. Other users have a configured list of roles (that is, users) they are allowed to

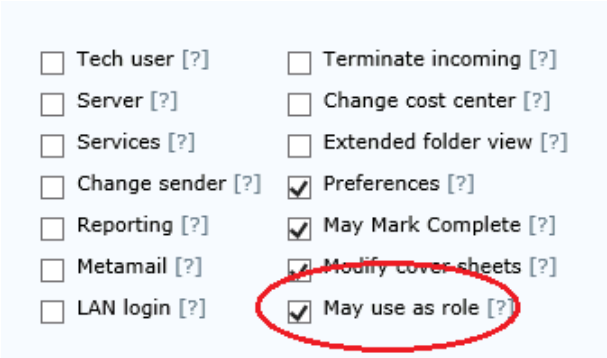
impersonate to. These settings are stored in the corresponding user profile and can be modified only by system administrators of TC/Web client having permissions:

- Write permission to group or system user profiles
- TC/Web admin user

Note This feature is not implemented within TC/Archive and therefore Archive folder in TC/Web may not work correctly while using this feature.

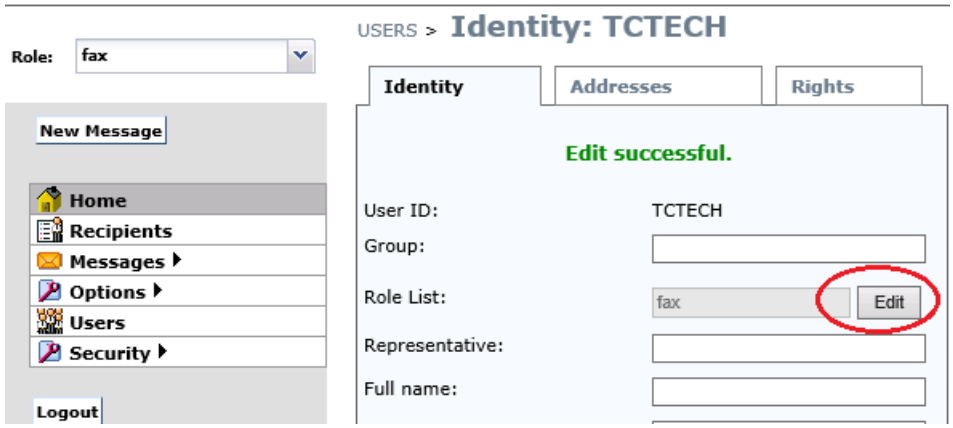
To activate the role feature, do the following in TC/Web client:

1. The system administrator have to identify some users (for example, auth, auth1 and fax) which can act as a role and then can check the **May use as role** right in their respective user profiles.



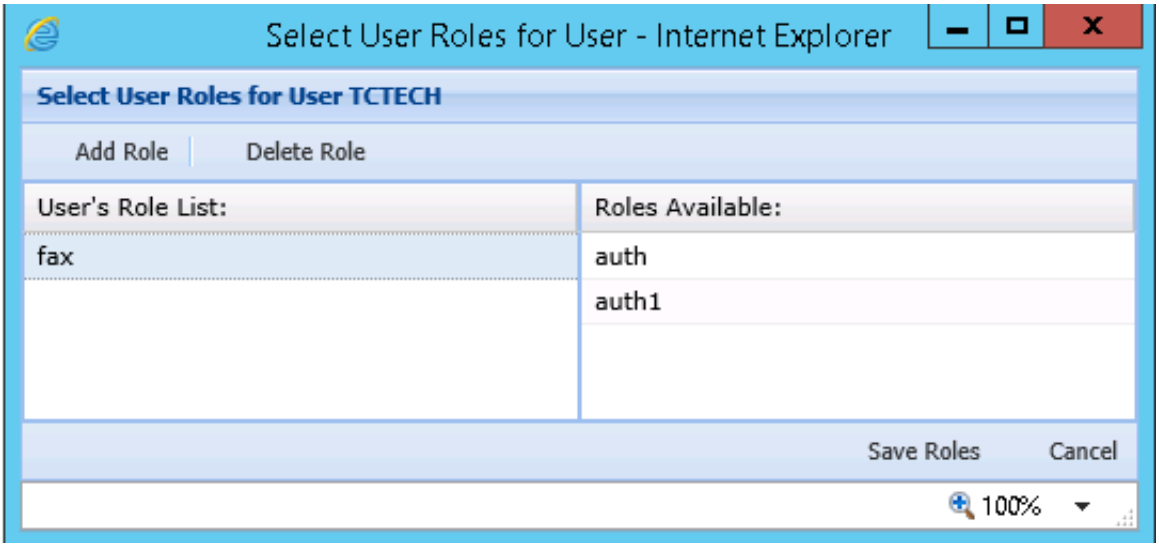
Picture 182: Select May use as role

2. The system administrator then adds these roles (users) to another user's role (for example, TCTECH, who will impersonate as other users). For this, edit the **Roles** list in the user's **Identity** tab by pressing the **Edit** button for **Role List** field.



Picture 183: Edit roles

3. The screen with a list of all the users who are available as roles is displayed in the **Roles Available** list. Drag and drop all the desired users from **Roles Available** list to **User's Role List**.

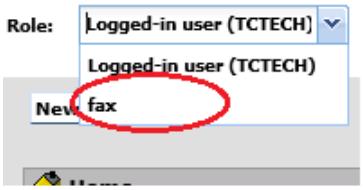


Picture 184: Select desired roles

In order to add one or more roles to the user, multi-select (left mouse click and Shift or Ctrl) the available roles list and drag-and-drop them into the user's role list on the left. Click the **Save Roles** button.

Note The roles list in the user's Identity tab does not reflect the changes automatically. Press F5 to refresh or logout and login into TC/Web again. This is applicable to the Administrator user as well who has added users as a role to his own account.

4. Now as the user (for example, TCTECH) log into TC/Web, it can impersonate as one of the roles (for exmaple, fax) by selecting the **Role** in the top of the TC/Web's main menu.



Picture 185: Select user as role

The user TCTECH in this example here impersonates as user fax and may continue working, but without login as user fax. This means that, after changing the role, TCTECH user can view the messages of user fax and can even send message on behalf of user fax.

Note Even if a user impersonates as another user, he still can only view the list of roles assigned to his user profile, and not of the role he is impersonating. That means, it is not possible to cascade the roles by impersonating to a role, and then further impersonate to one of roles assigned to user.

Important After a user has finished the work by impersonating as another user, he should switch back to his original role. The impersonation to a role is valid only during the current TC/Web session. Once a user logs out, the information in the role which may have been used is deleted.

If a user impersonates as another user, the audit log entries are generated as for the logged in user.

Chapter 5

Restrictions

This section provides the applicable restrictions when using TC/Web.

General

- Users (ids) and distribution lists must be numeric; otherwise sending with covers created by fax OCR does not work.
- As compared to TopDeskPro: no scanning support, no attaching into other mail client
- The tool may appear differently in different browsers.
- The functionality of TC/Web is limited if Security settings of Internet Explorer are set to “high”.
- The maximum number of supported recipients per type is 200 when sending with the “Send Message” tool. 200 TO, CC, BCC, AUTH recipients can be sent to for a total of 600. TC/Broadcast can be used to send to more recipients at once.
- Recommended screen resolution is 1024x768. With lower resolutions, some action buttons may not be displayed correctly.
- If you are using a language other than the language of your browser, some messages or buttons will be displayed in the language of the browser. (For example, if you have enabled German in TC/Web together with the English version of Internet Explorer or Mozilla Firefox, the button “Browse …” is displayed.)
- If you delete a distribution list that contains numerous recipients, the recipients' addresses and services may not be shown. In this case, only their IDs and names are displayed in the Recipients view.
- It is not allowed to mix TCfW and TC/WEB when using the Authorizing tool. A TC/WEB user must send the message to another TC/WEB user, and the message must be authorized it in TC/WEB.
- To sign and then authorize a message, a user must have the Change Message Content right.

Compared to TCfW

- No directory lookup while correcting messages; addresses can only be edited directly
- No image preview of faxes is available before sending
- Limited message templates
- Last user settings (open folders) not saved
- Limited creation or selection of message templates
- Attaching to new messages from printer driver or fax scan is not possible
- Rich text cannot be entered
- No preview mode for composed messages

- No management of lines, server (requires TCfW)
- No distributor mode
- It is not possible to sort on all fields. Due to technical considerations within the TCOSS system, sorting has only been implemented on specific fields
- There is no user interface to include a distribution list in another distribution list