CONCORDFax
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Concord Fax Online
Account Administration Center (AAC)
Administrator Guide

V. 2.0.1 (2010)

Concord Technologies

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This is the second edition of this publication.

Version

This guide describes the (AAC) release 2.0.2 April 30, 2010

Contents

About the Concord Fax Online Account Administration Center (AAC)

The Account Administration Center (AAC) is a web-based application that enables fax service administrators and fax end users to view detailed information about their fax accounts. A variety of status indicators, account settings, and reports are available.

Administrators have the ability to register new fax users in the business account, and to make changes to the user accounts once they are established.

Fax end users may log in to view and maintain their personal fax account information.

Getting Started

To get started, one must have an account in the AAC.

Administrator's accounts are created by Concord. This is typically done when a new business account is created for the first time. Multiple administrators may share a single login, so that administrative responsibilities may be shared.

When establishing administrators, it is advisable to provide a descriptive label that defines the group or sub organization maintained by them. That label will be displayed in the AAC for identification purposes. For example, there may be three administrators in the Insurance Claims department, who share a single AAC login. If the label "Insurance Claims" is configured during account setup, then all pages displayed in the AAC will include the heading

Group: Insurance Claims

Once the master business account and its administrators are set up, the administrators are responsible for creating user accounts. This guide describes all of the procedures related to user account maintenance.

Logging In

The AAC is accessible via the Internet at http://accounts.concordfax.com alternately you can also reach the AAC by going to the Concord website at www.concordfax.com and selecting the "My Account" option, which is listed among the selections across the top of the home page. The AAC login page will be displayed.

Enter your assigned AAC login and password in order to login. If you have forgotten your password, you may recover by using the "Forgot Password?" link on the login page. Follow the prompts and your password will be sent to the email address recorded for your account.

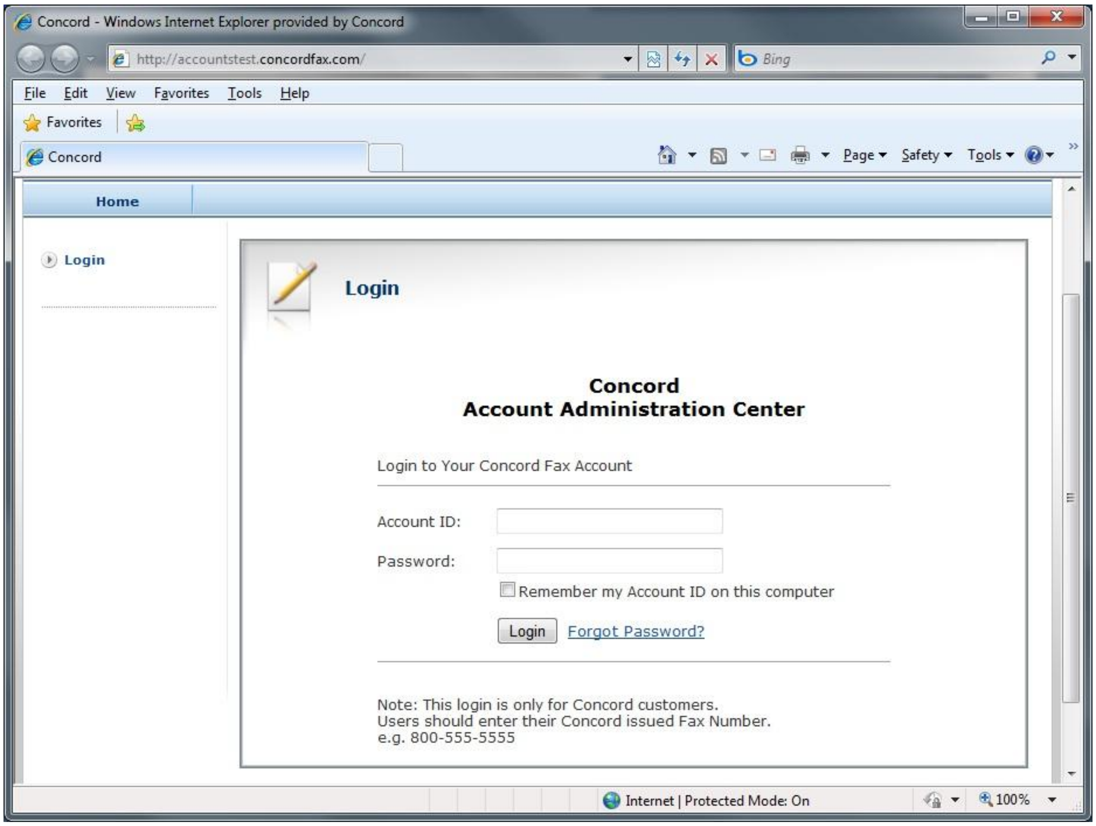


Figure 1. The AAC login page. The forgotten password recovery mechanism will send a new password to the email account registered for the fax number provided.

AAC Functions

Account Overview

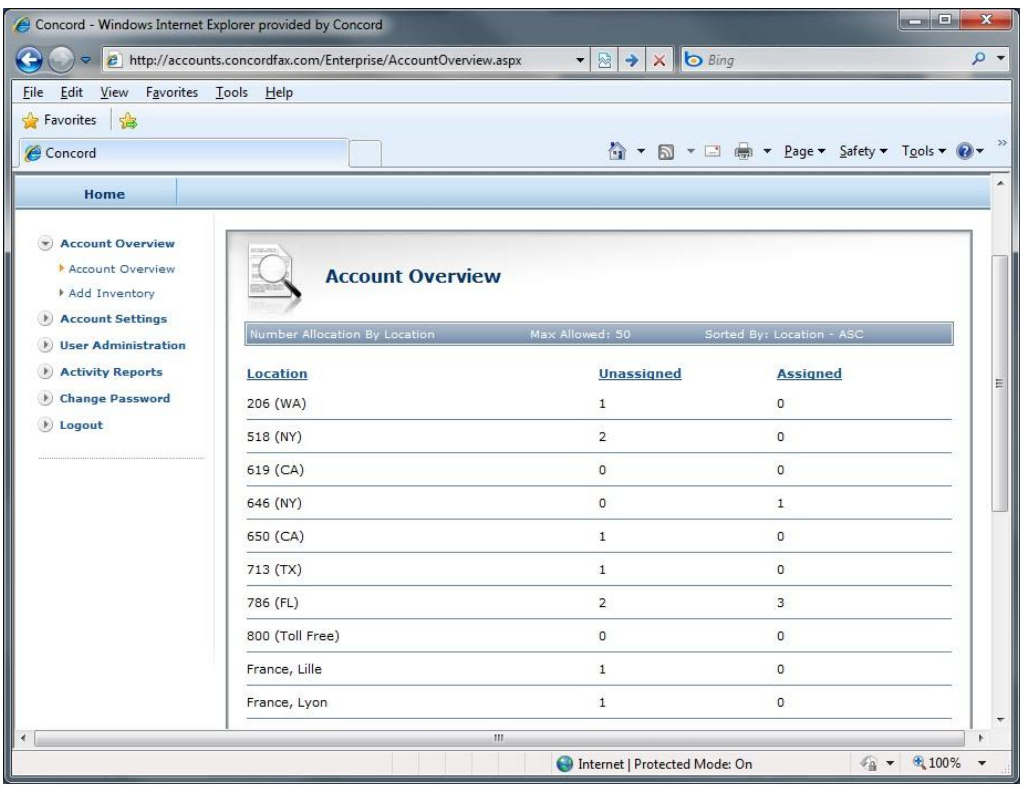
Click the "Account Overview" link on the left navigation bar to enter this function.

Account Overview provides an inventory report on the phone numbers that have been purchased for use in the business account.

Location – designates the name of the grouping or "pool" of phone numbers in the inventory of the account. Phone number pools may be defined and named by the administrator as desired by the business.

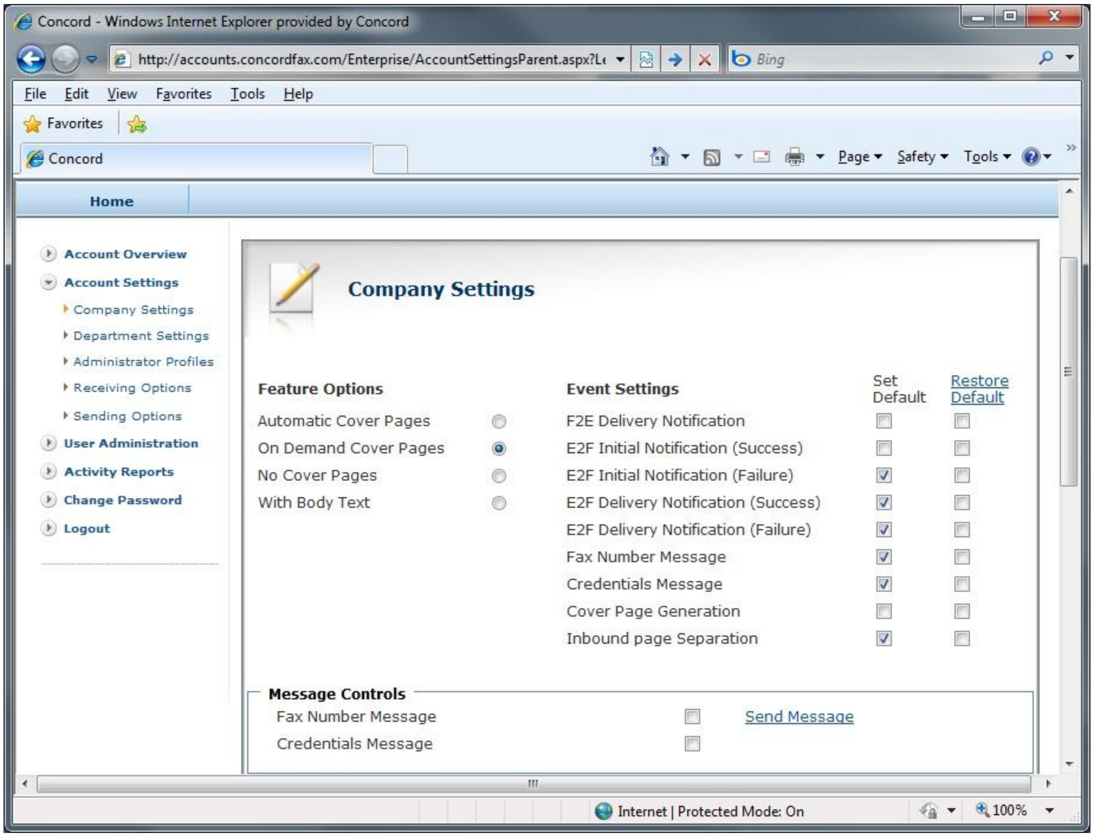
Unassigned – the quantity of phone numbers in the pool still available for association with fax user accounts.

Assigned – the quantity of phone numbers from the pool that are associated with fax user accounts.



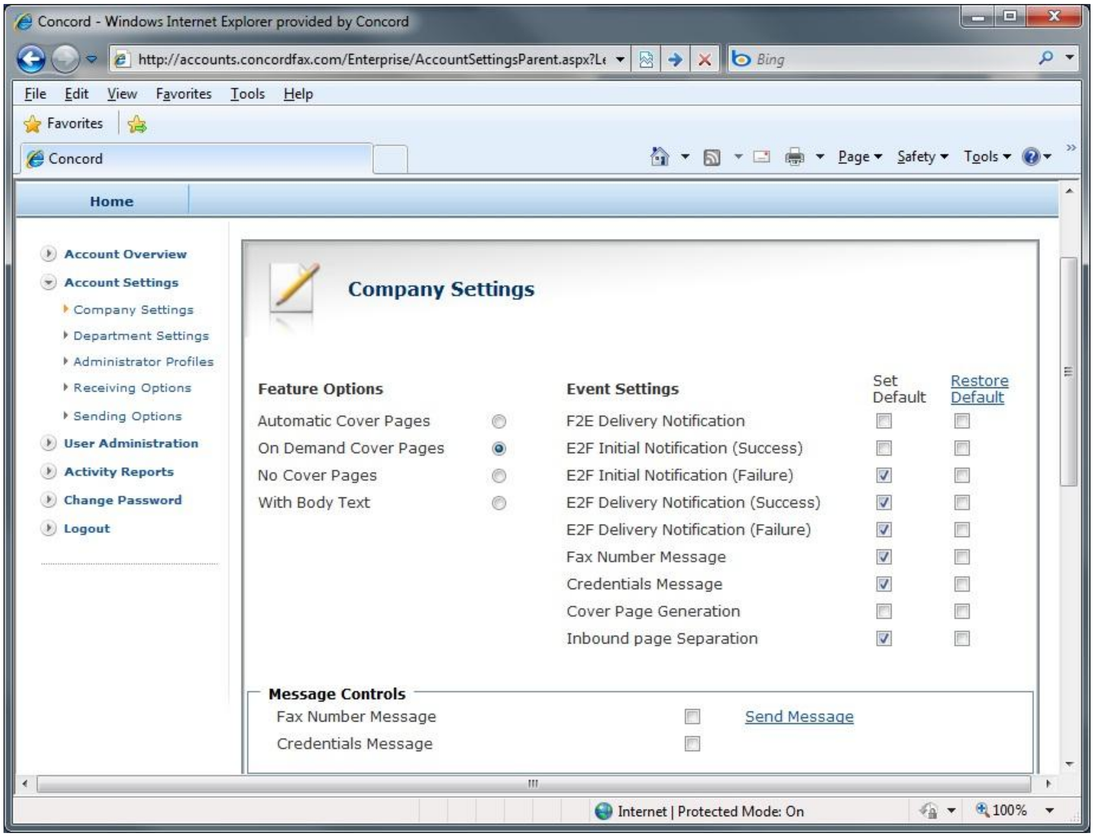
Account Settings

This function gives the administrator control over the email addresses utilized in the account for sending and receiving faxes. It is used to create lists of allowed email domains. Implicitly, any domain that is not in these lists is not allowed. User email addresses are processed according to these lists.



Company Settings

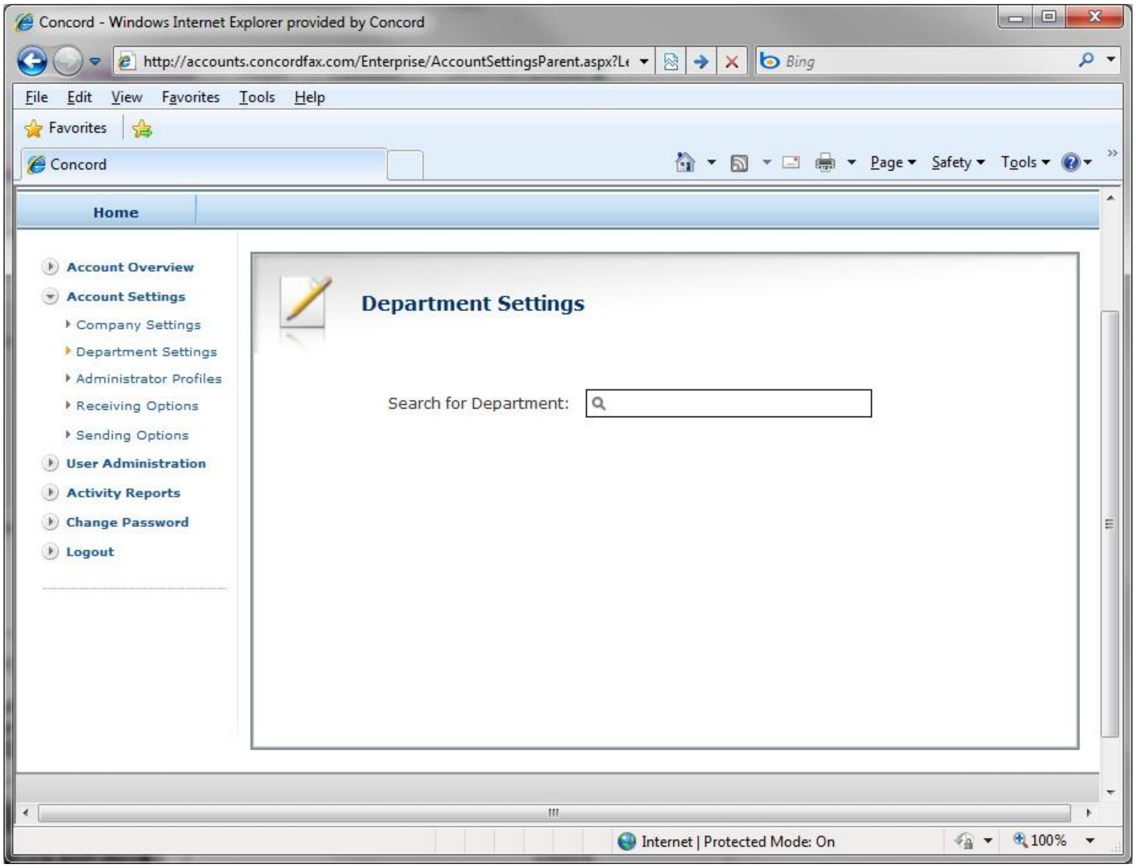
Company settings are used to configure cover pages, event settings, message controls, cover page selection and formatting options.



Department Settings

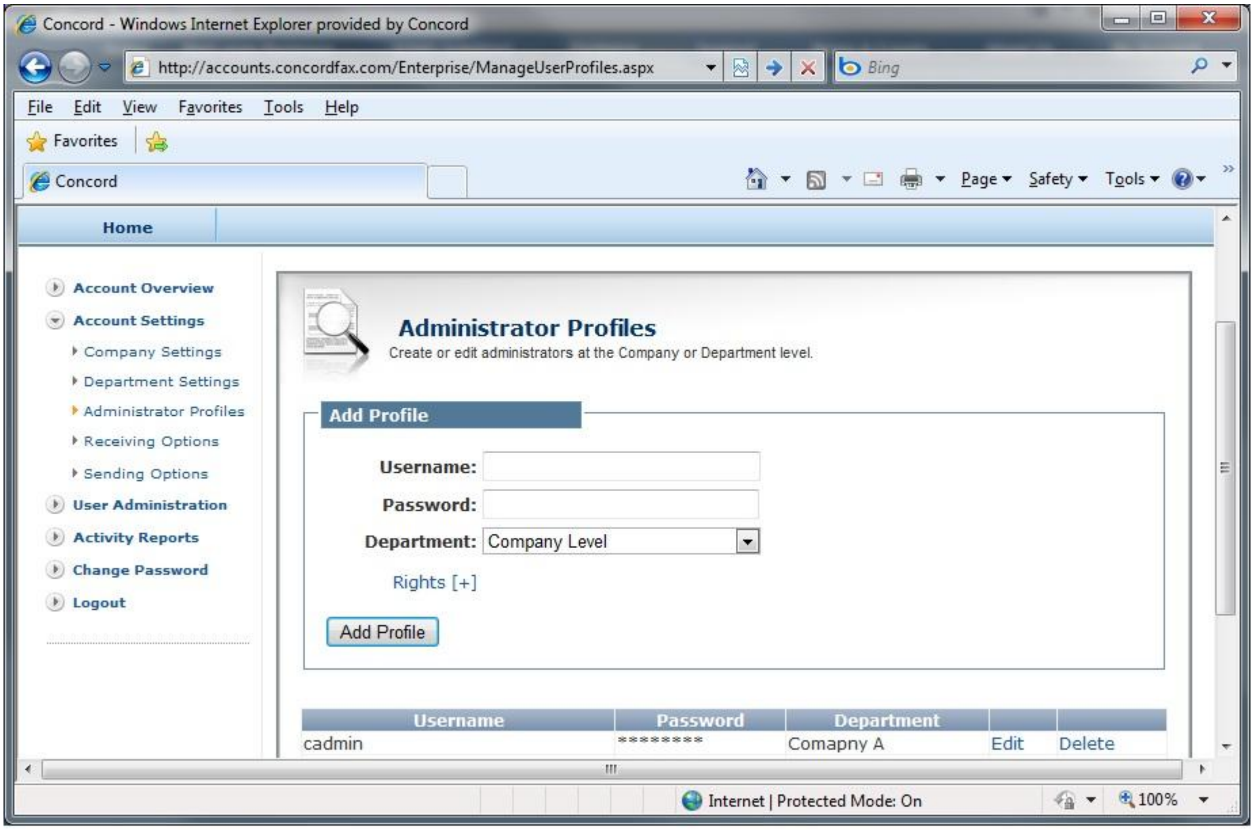
Used to configure the same account settings available for Company settings, yet at the department level.

When you click into Department Settings you will see a drop-down option that asks you to select Department. Once a Department is selected you will see account settings that a very similar to the Company Settings only these settings will only apply to this department.



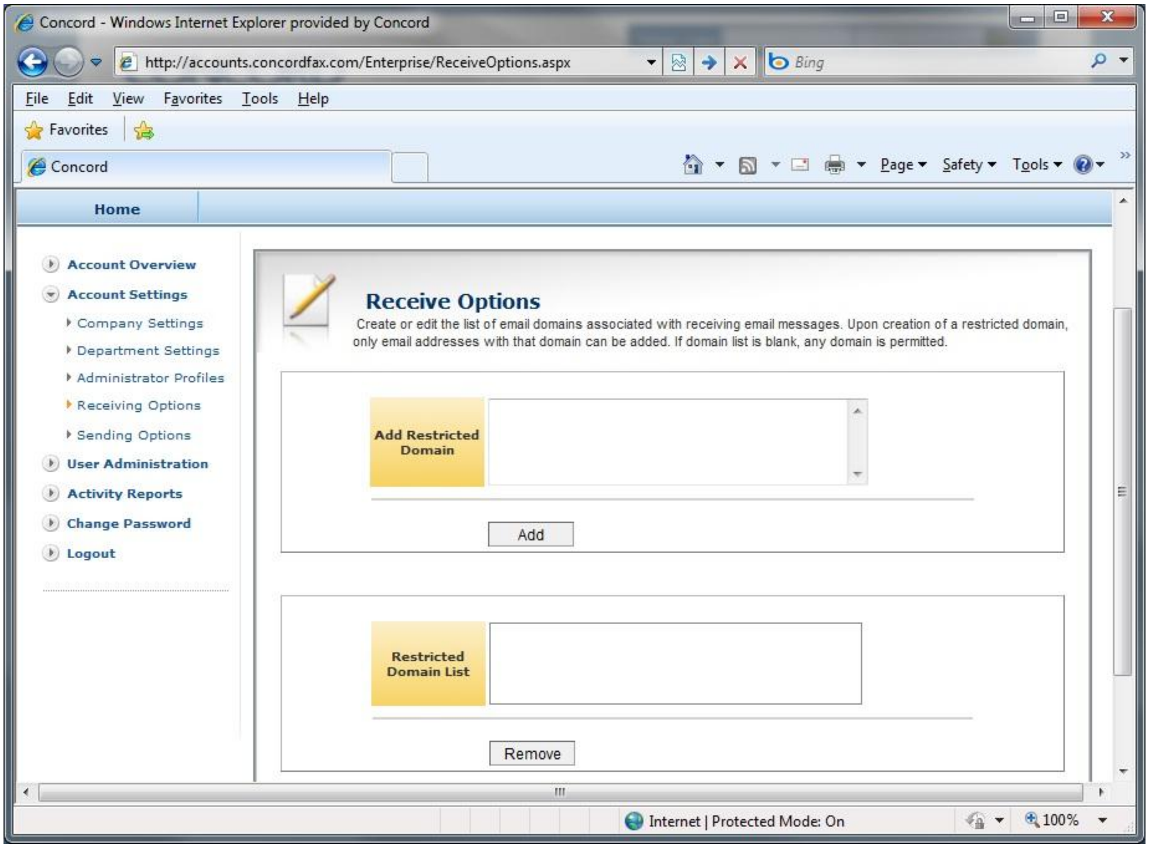
Administrator Profiles

Administration profiles are used to manage the creation and removal of accounts that have administrator rights on the AAC.



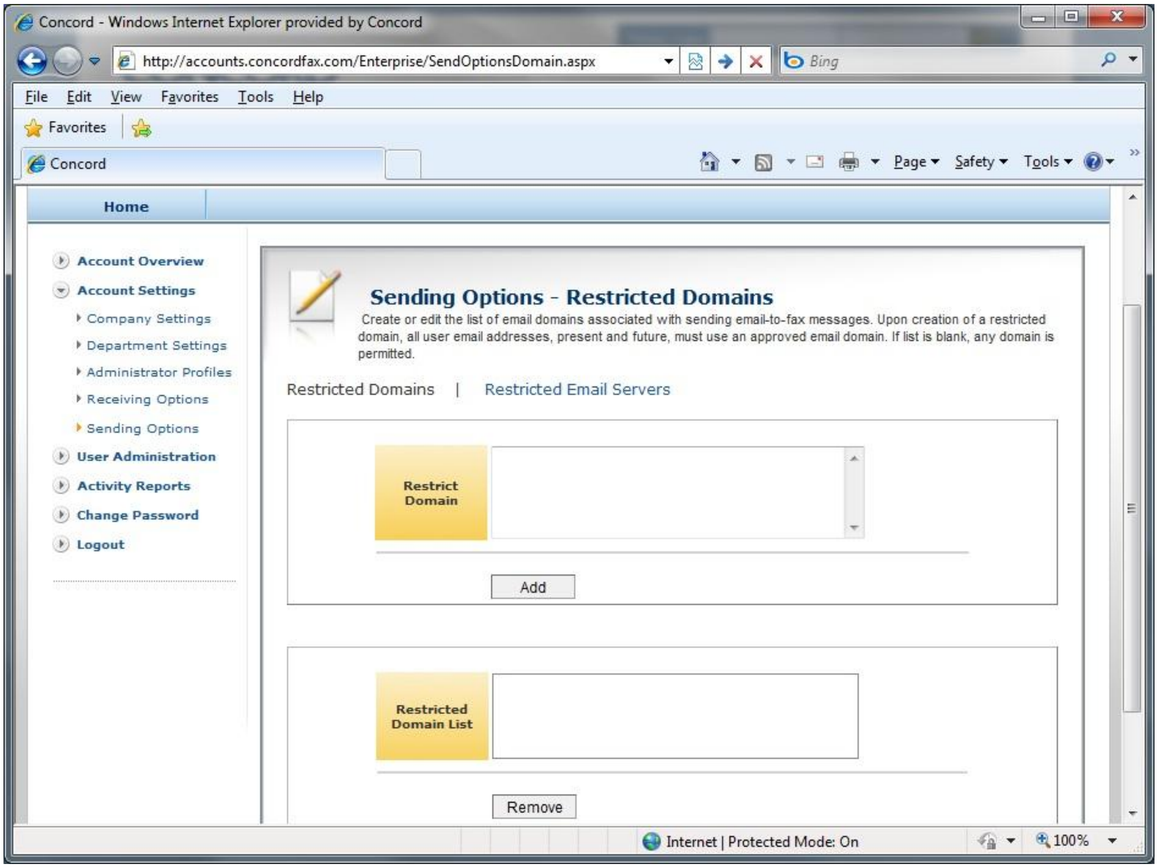
Receiving Options

Used to create or edit the list of email domains associated with receiving email messages. Upon creation of a restricted domain, only email addresses with that domain can be added. If domain list is blank, any domain is permitted.



Sending Options

Used to create or edit the list of email domains associated with sending email-to-fax messages. Upon creation of a restricted domain, all user email addresses, present and future, must use an approved email domain. If list is blank, any domain is permitted.

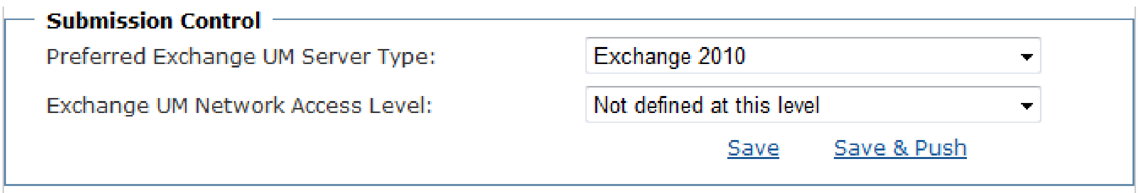


Microsoft Exchange Submission Controls

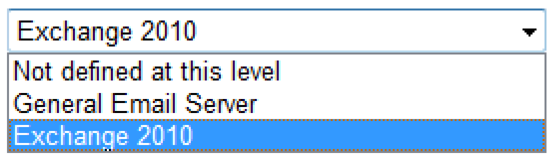
For our customers that employ a Microsoft Exchange 2010 Server a "Submission Control" option will be made available in Account Settings, Department Settings, and User Account Settings.

This Submission Control option is only usable by customers that have added the Exchange service feature to their FaxOnline account.

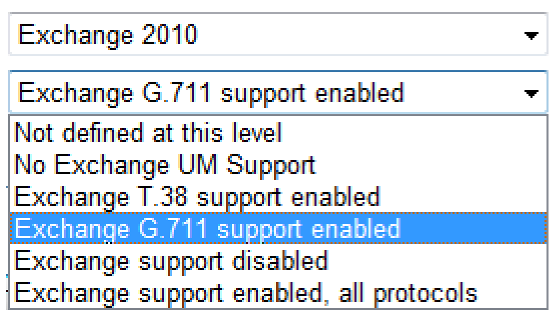
Microsoft Exchange Company Level Settings



- **Options available for Server Type**



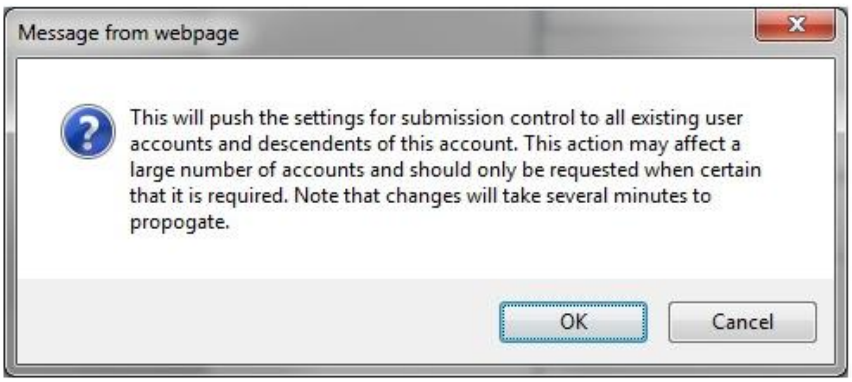
- **Options available for Access Level**



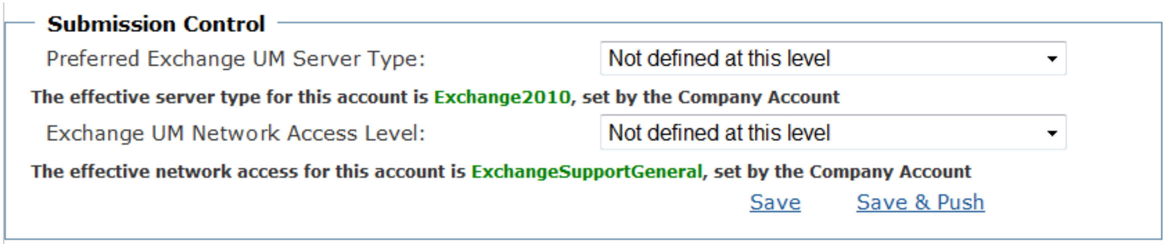
- In order to explain the two "save" options, which are: Save; Save & Push; an explanation of the concept of Inheritance is necessary.

  - ✓ When a company is created there can be departments and users under that company. Departments can "inherit" the company's settings, or, Departments can have their own, unique, Submission Control settings that differ from the Company.
  - ✓ If a Department or a user "inherits" a company's settings in Submission Control the setting will be "Not defined at this level." Directly below you will see information on where these settings were inherited.
  - ✓ If the settings are not inherited the fields will populate as defined.

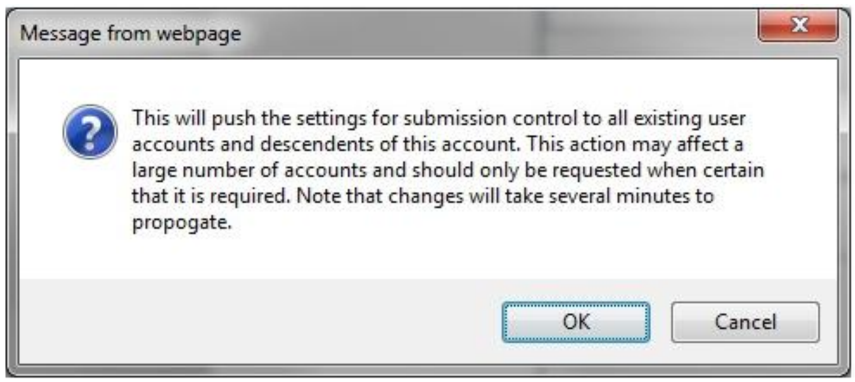
- When these components for Submission Control and access are defined, an admin can either Save the selection, or, Save & Push the selection.
    - ✓ Saving the selection will make the change apply to all users and departments that are inheriting from the company,
    - ✓ Save & Push will make the selection apply to all existing Departments and Users. So, if you were to Save & Push the change at the Company level every department and every user would inherit the Submission Control settings. If you were to Save & Push the change at the Department level every sub-department under that department and every user under that department would inherit the Submission Control settings.
- Configuring a department or a user's Submission Control settings will disconnect that user, or department, with the company's Submission Control server settings, until the settings are set to Save & Push at the company level. (See Save & Push warning below).



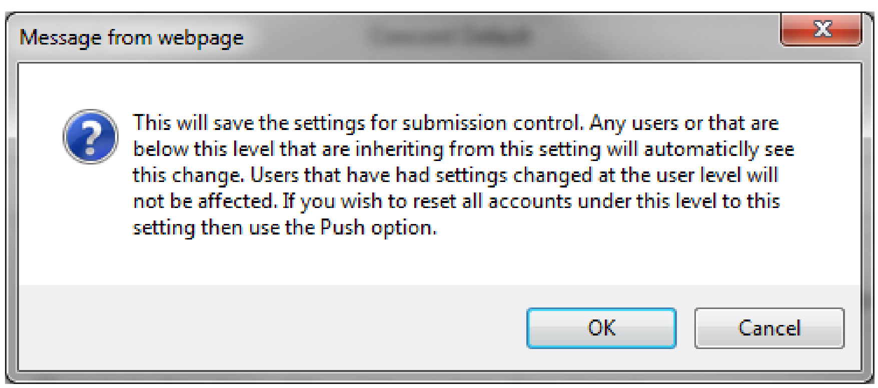
Microsoft Exchange Department Level Settings



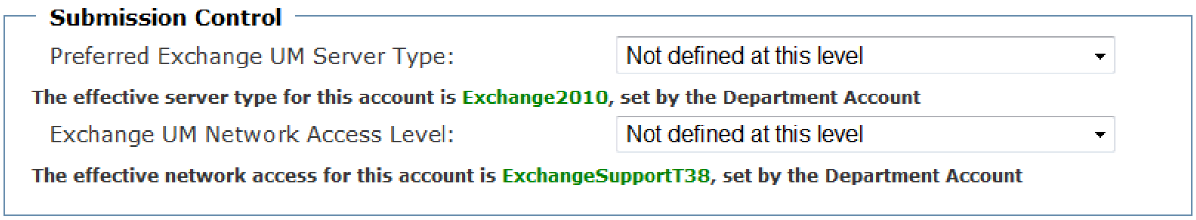
- As you can see, the Exchange settings have been inherited by the company account.
- Exchange settings may be changed at the Department level.
- When you Save & Push this type of change you will get the following alert.



- When you save the changes you make at the Department level you would see this.

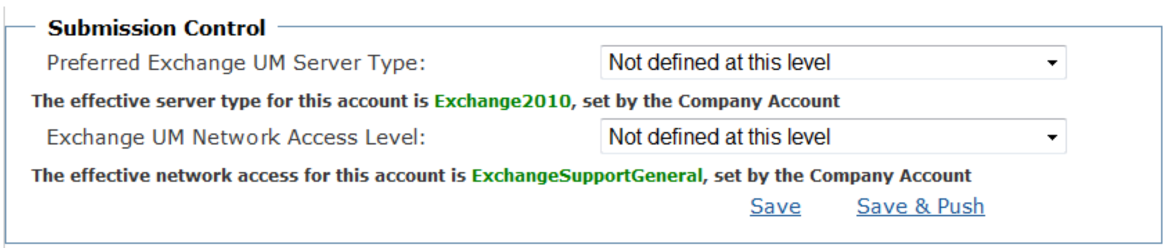


Microsoft Exchange User Level Settings



- As you can see, the Exchange settings have been inherited by the Department account.

- If these Exchange settings were inherited by the Company you would see the following.

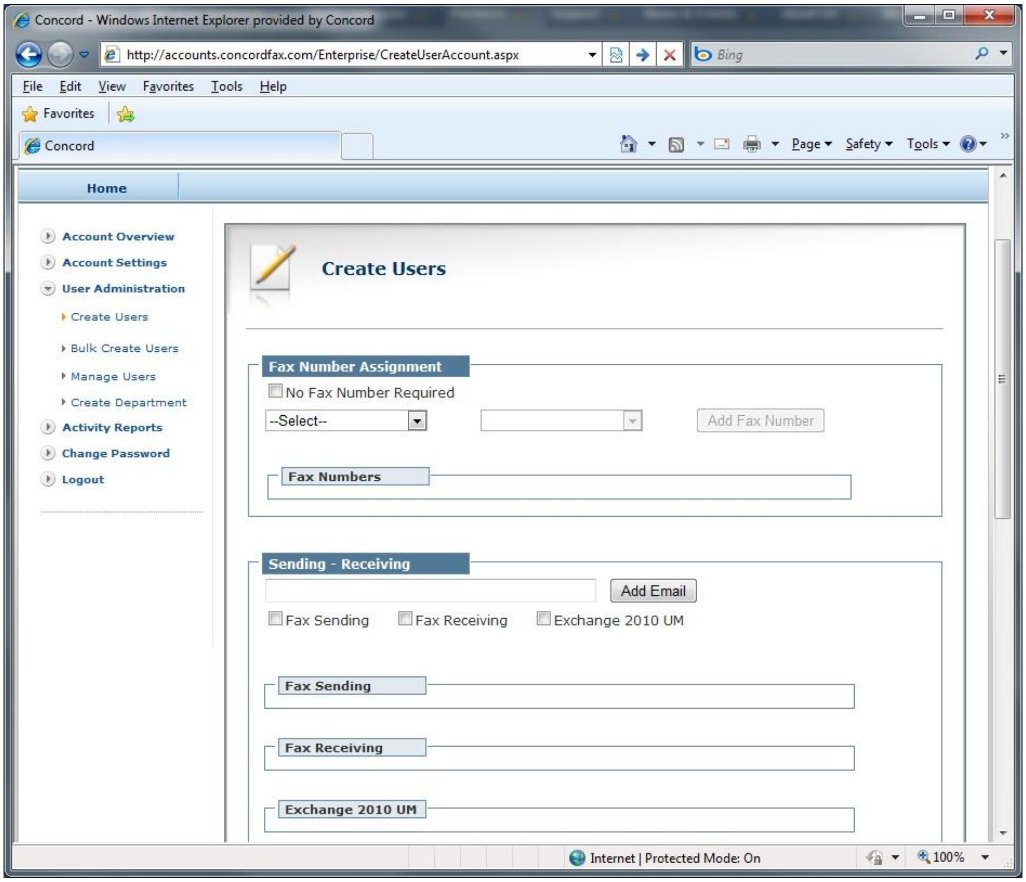


User Administration

The AAC provides a complete set of functions for maintaining control over user accounts. This includes the ability to add and update user information, to delete user accounts, and to temporarily disable fax activity by suspending the account.

Creating Users

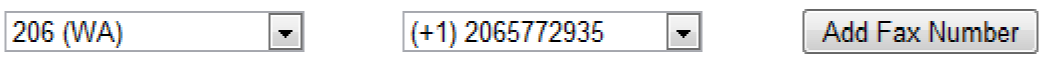
This function is used to establish a new fax user account. Click the "Create User" link to display the user information page.



Fax Number Assignment: This field allows you to assign fax numbers, if necessary.

- In the first field, if the box is checked to the left of **No Fax Number Required** it indicates this account can only send faxes. It cannot receive faxes.
- Below this field is a field that allows you to select an area code you have in inventory.

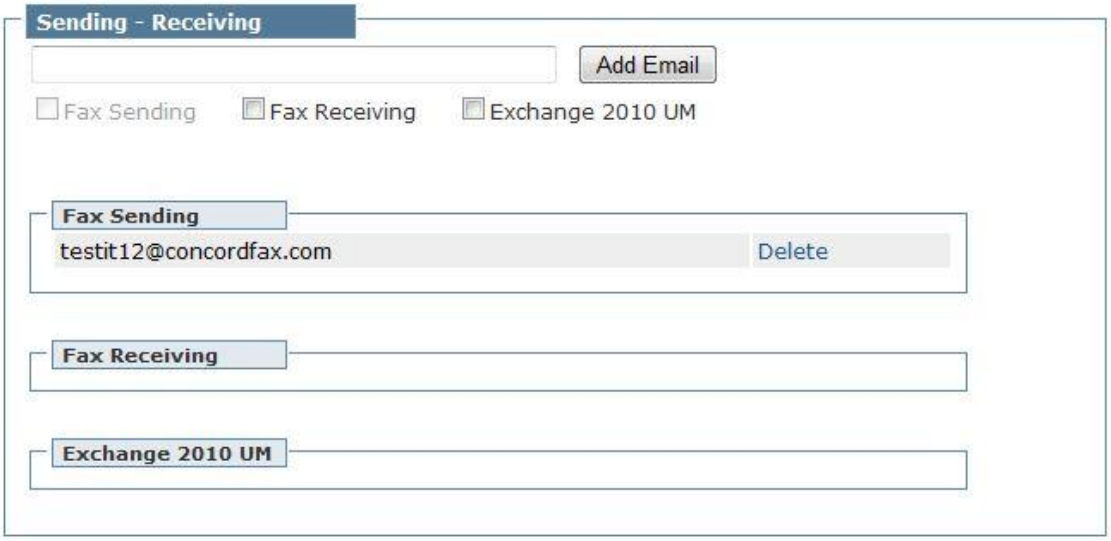
- Once the area code is selected the field to the right will propagate.



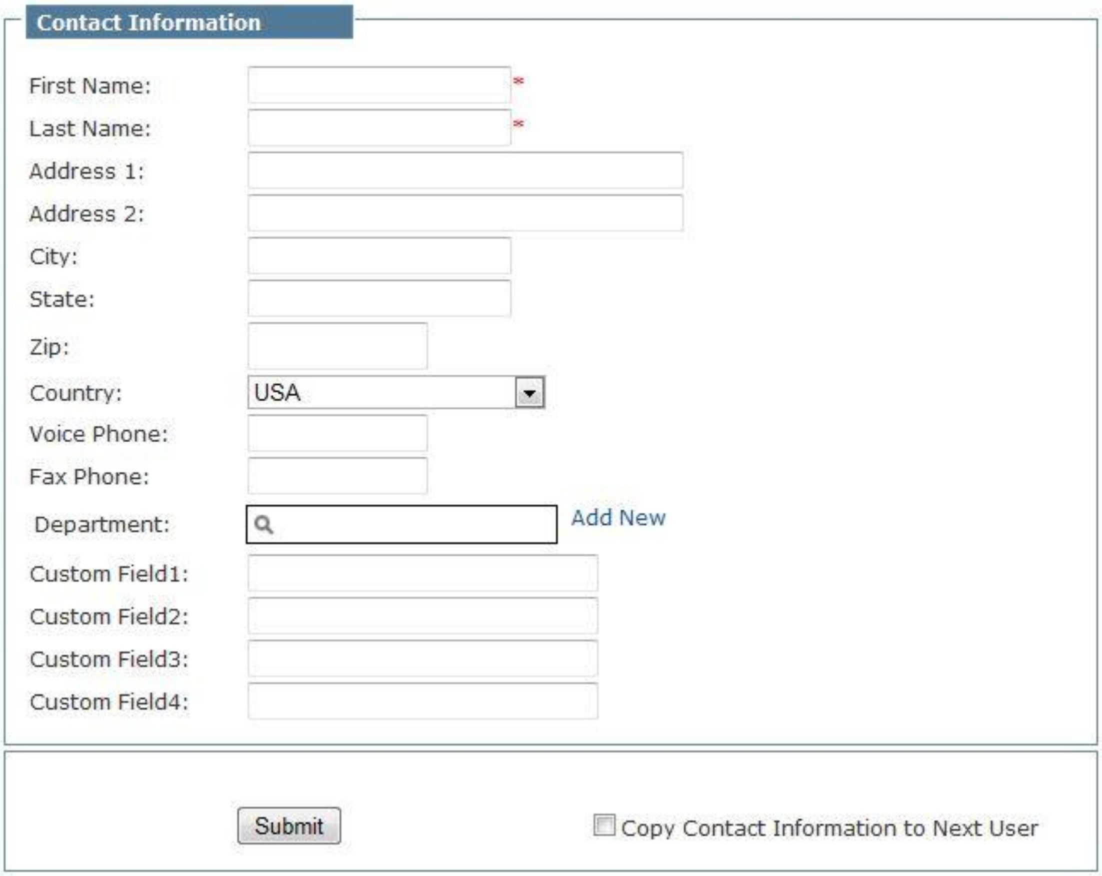
- The fax number can be selected and the "Add Fax Number" button can be pushed.
- Once all of this is done a fax number is available for the creation of a user.
- If you chose "**No Fax Number required**" then you will not need to assign a fax number and can move on to the next field.

Sending - Receiving: This is the field that allows you to validate your sending email address and to point faxes to the email address you wish to receive faxes.

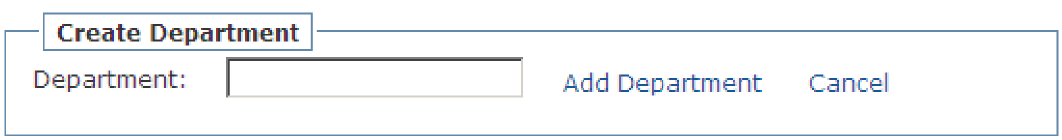
- In the example above Fax Sending is the only box checked, so, when the Add Email button is clicked the following screen will appear.



Contact Information: This is where the user details would be added. Remember, there are only two required fields, First Name and Last Name, all of the other fields are optional.



The field labeled “Department” is a field that allows you to “Create Department.” When you click “Add New” the following Create Department view opens.



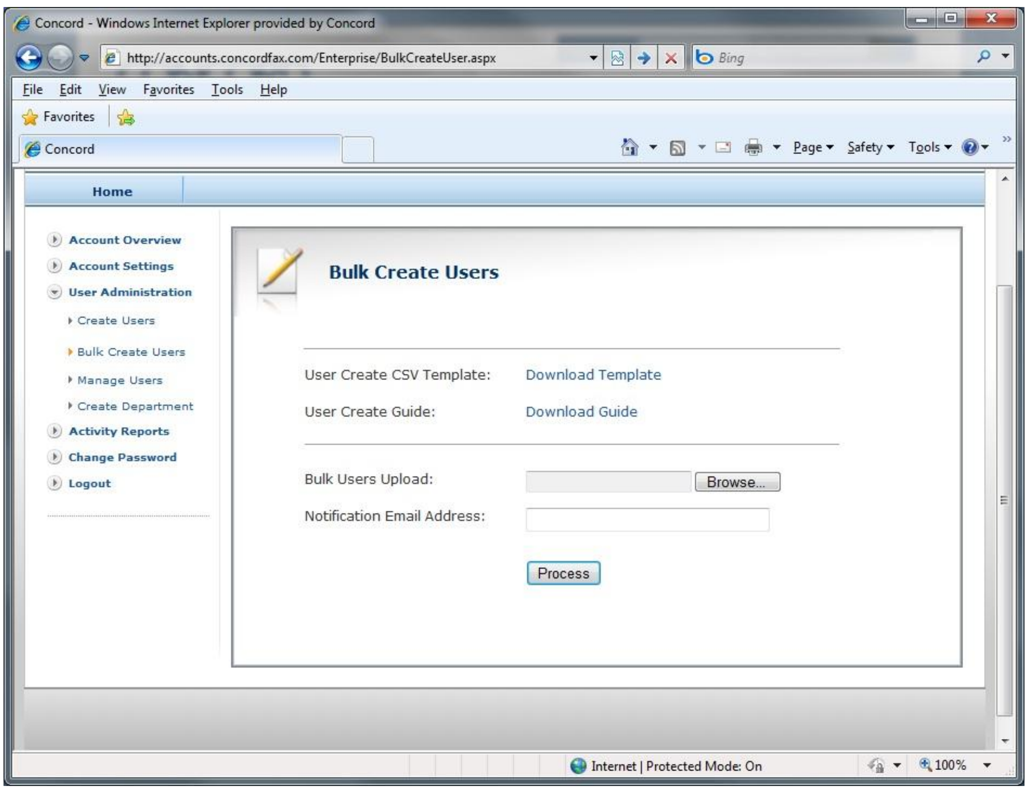
The **Create Users** tool offers a quick and simple method for adding a small number of users and departments. However, for large scale user and department creation the **Bulk Create Users** tool, described on page 21, is indispensible.

Bulk Create Users

This tool is used to create multiple fax user accounts. Click the "**Bulk Create User**" link to display the user information page. The "**Bulk Create User**" page allows multiple users to be created in an offline process by uploading a Comma Separated Value (CSV) file with the necessary information required to create an account for each user. The process involves…

- ✓ downloading the template
- ✓ adding each user to be created to the template
- ✓ uploading the template to request the accounts be created
  - by "Browsing" to where you saved the .CSV file
  - pointing the notification to your Email address
- ✓ When you click on the "process" button you will receive an immediate notification the upload was successful, or, it failed.

Once the offline process has completed a confirmation email will be sent with the status of each account created.



The first time you use the Bulk upload feature there are two things you should do.

1. Verify you have enough fax numbers, with the correct area codes, in your phone inventory
2. Contact Concord Support and ask any questions you may have about this process

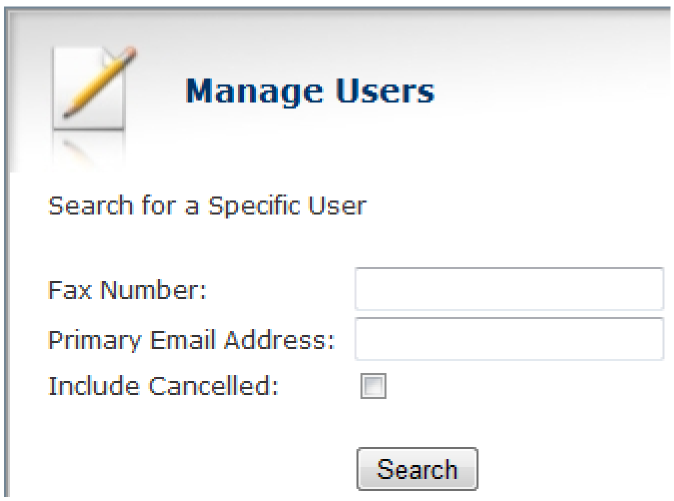
The "**Bulk Create User**" tool makes the process of creating multiple departments and adding multiple users simple and efficient.

Manage Users

Once entered into the system, users are immediately enabled to send and receive faxes using their own fax numbers and email accounts. Administrators may monitor the user's fax activity and control a variety of user account settings by use of clicking on the "Manage Users" link.

To start any user management procedure, it is first necessary to locate a user entry in the system.

Search for a Specific User



This function provides a way to locate a specific user out of all registered users. Using the search form, you provide requested details about as the basis for the search.

Fax Number – numeric field for the user's unique fax number.

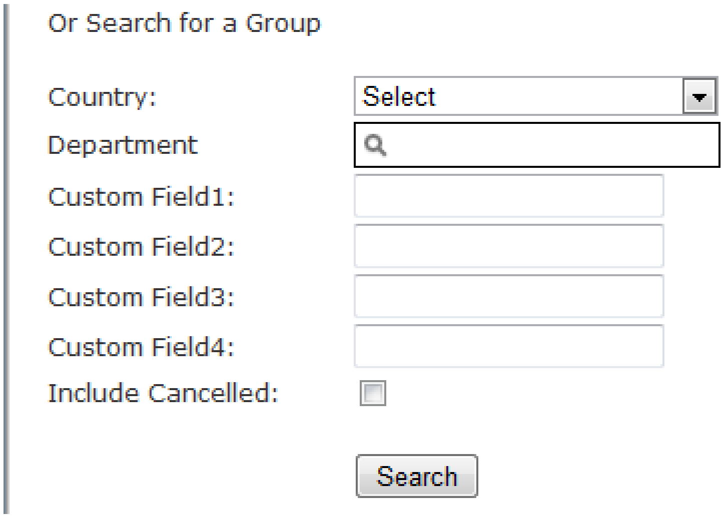
Primary Email Address: – You may look for a specific user by their Email address.

Include Cancelled – check this box to display cancelled accounts. Group User Search

Specific User Results:

- A specific user search results in a form that displays all of the data about the specific user located. The fields are the same as those displayed in the "Create User" function.
- The top of the page displays a Search form, to provide a convenient method to perform a new search for a specific user.

Search for a Group



You may also locate users that fit a broad category of search criteria. Typically this approach is used when the unique criteria required for the specific user search are not known, but the group search is also useful in situations where you want to find all users that fit a common category, such as all users in a known department.

Country – Selection list from which to choose the country associated with each user entry.

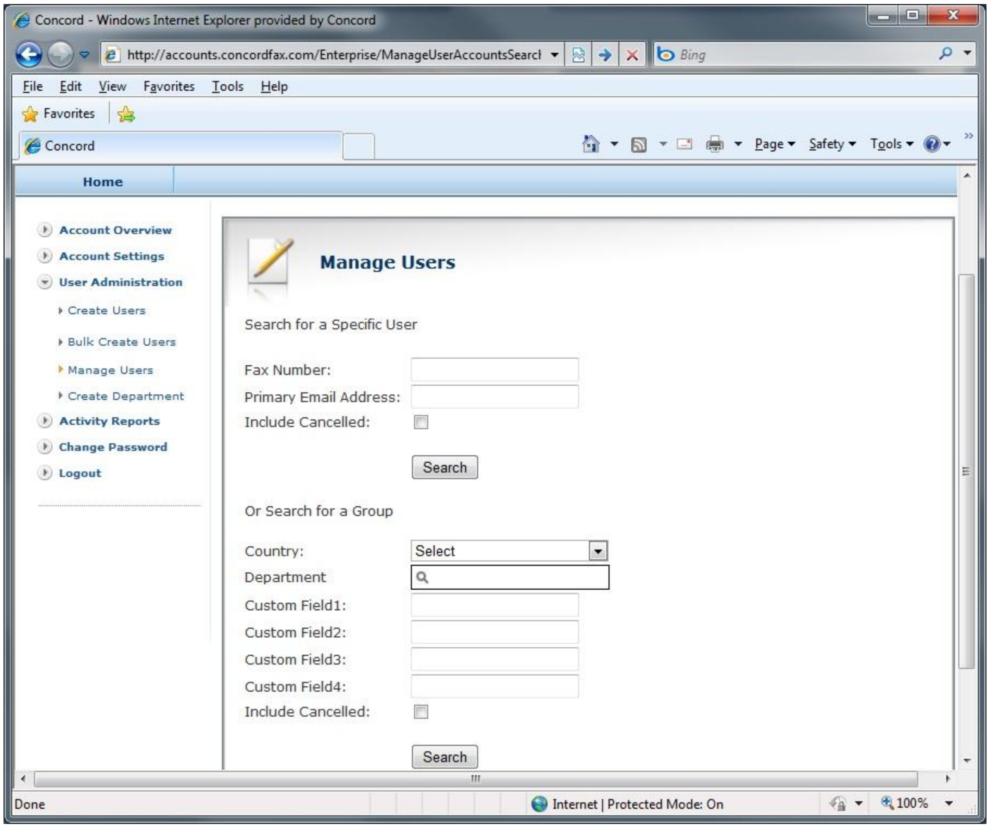
Department – Selection list from which to choose the department associated with each user entry. The list of departments is specific to the account, and is created in the Create User function (see "Creating Users", in section NNNN)

Custom Fields – Text fields containing account-specific data, such as cost center codes (see "Creating Users", in section NNNN).

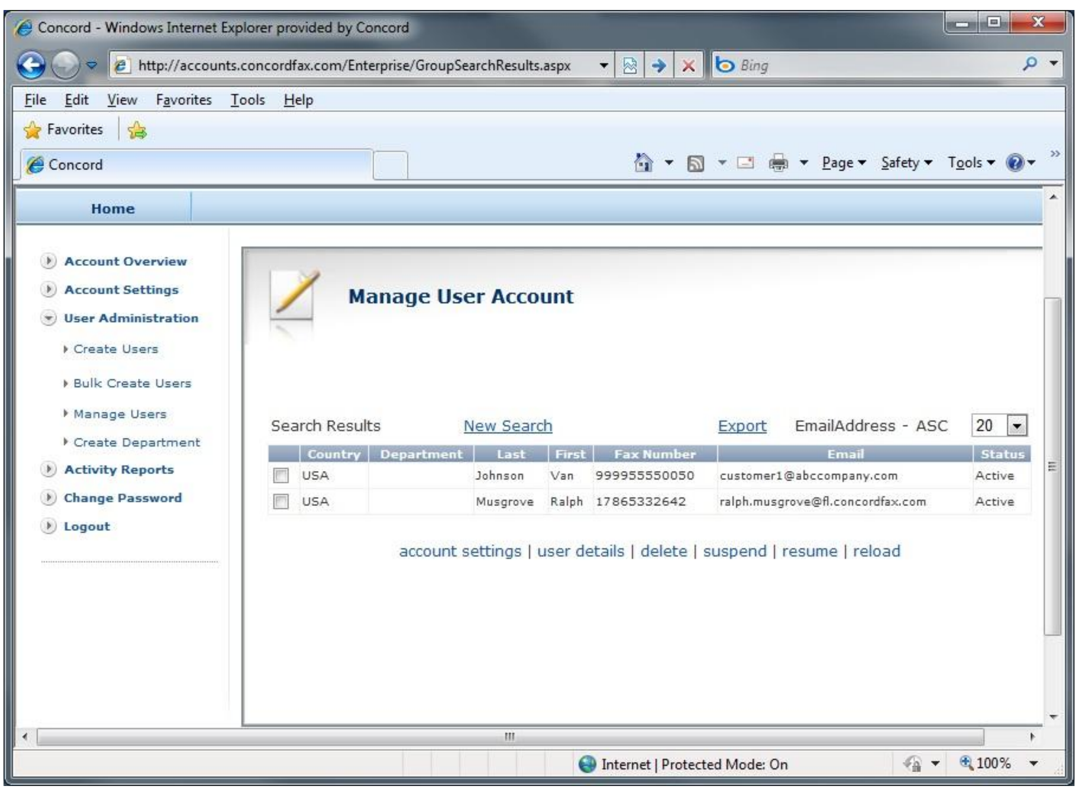
Enter one or more of the fields described above and press search. All users who fit the criteria will be returned.

Include Cancelled – check this box to display cancelled accounts.

Manage All of Your Users



If you were to click on the Search button at the bottom of the page you would be taken to a screen with all of your users listed. This is often the course taken by administrators to view all of their users.



Group User Results

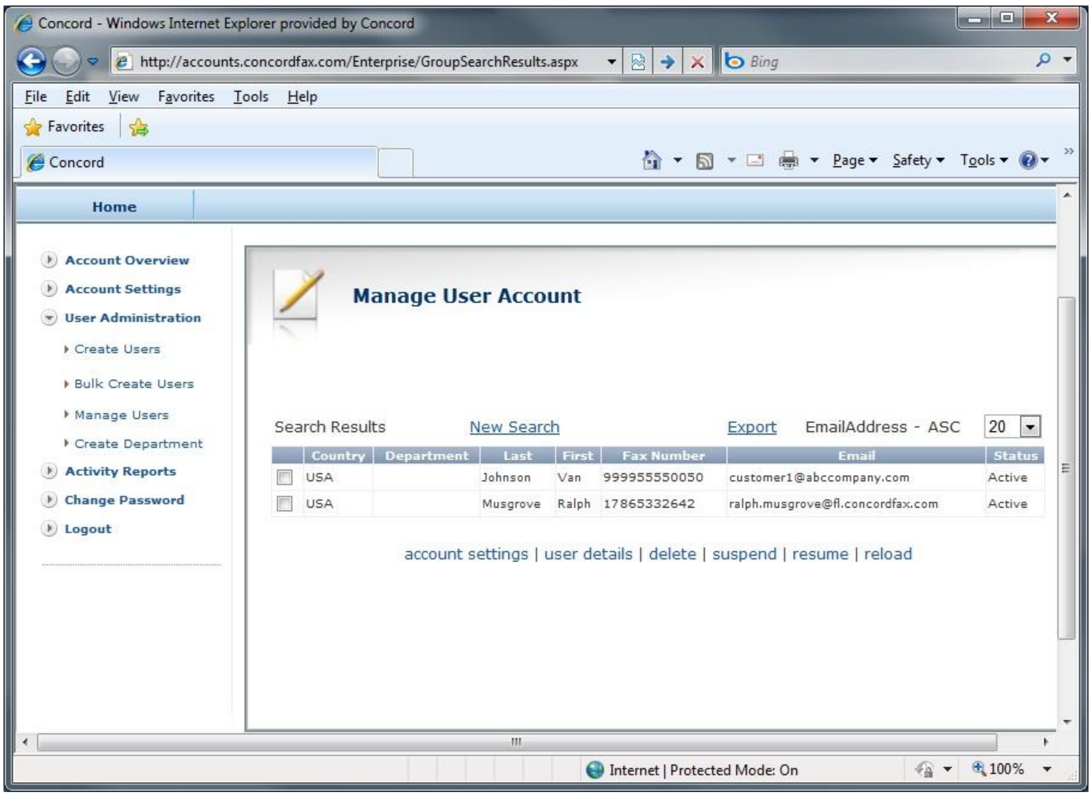
When a group search is performed, the results are presented in summary form. Information presented for each user includes the first name, last name, fax number, department, first outbound email address, and account status.

Multiple users' summaries are displayed in along with a check box next to each. The check box enables selection of one or more users for the actions that may be taken on the bottom navigation bar.

Management Actions

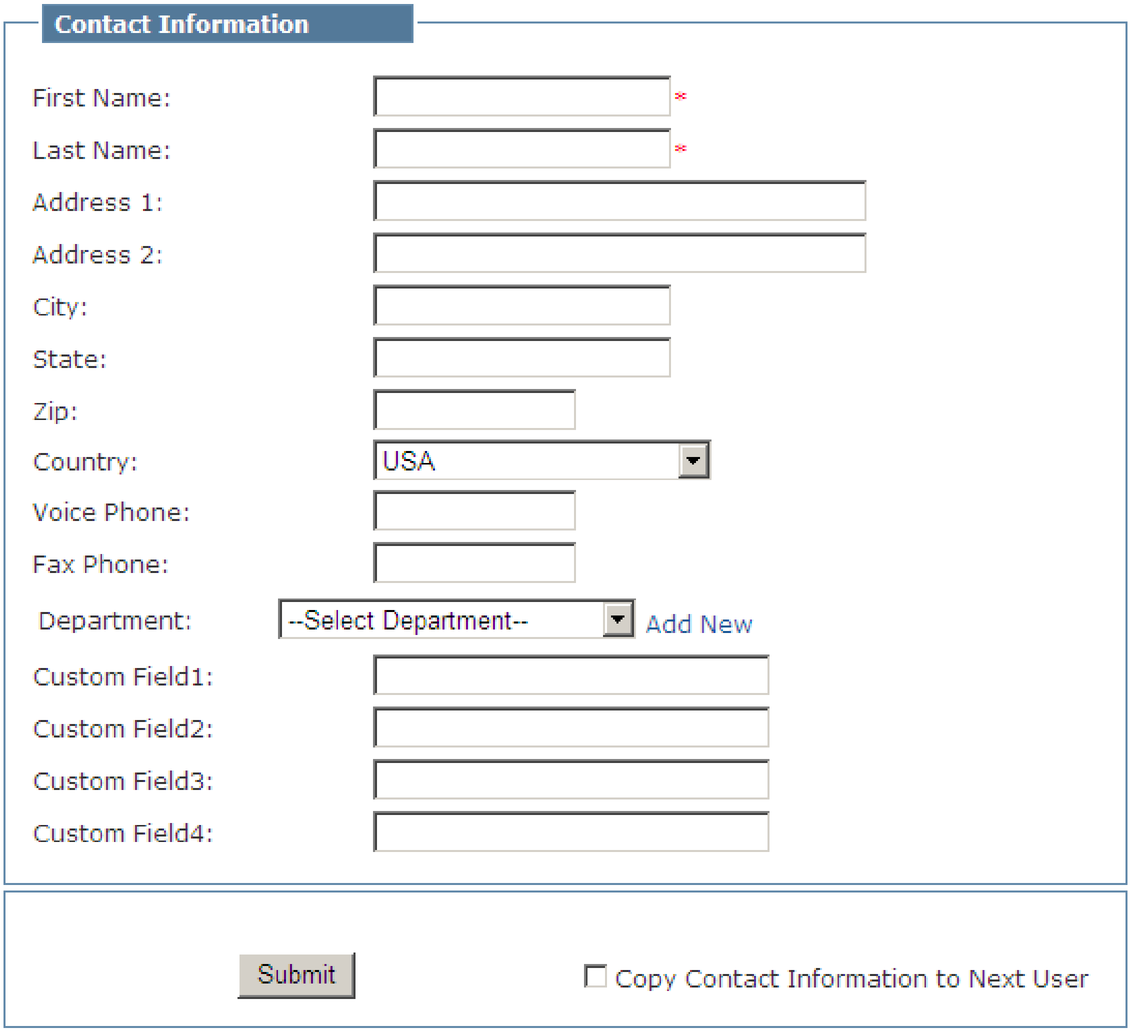
Search results for a group of users present a number of data management choices at the bottom of the results page.

Account Settings – this link is available for a multiple user search resulting in reaching the Manage User Account screen.



Clicking the "account settings" link at the bottom of the page will display the details for each user checked in the boxes to the left of the search results. The account settings look very much like the account settings for the Company and the Department/s, however, these settings are specific to the user.

User Details allows you to edit a user account and is similar to the Create Users screen.



Delete – cancels the selected user account. Once the account is deleted the user may no longer send or receive faxes via the fax service.

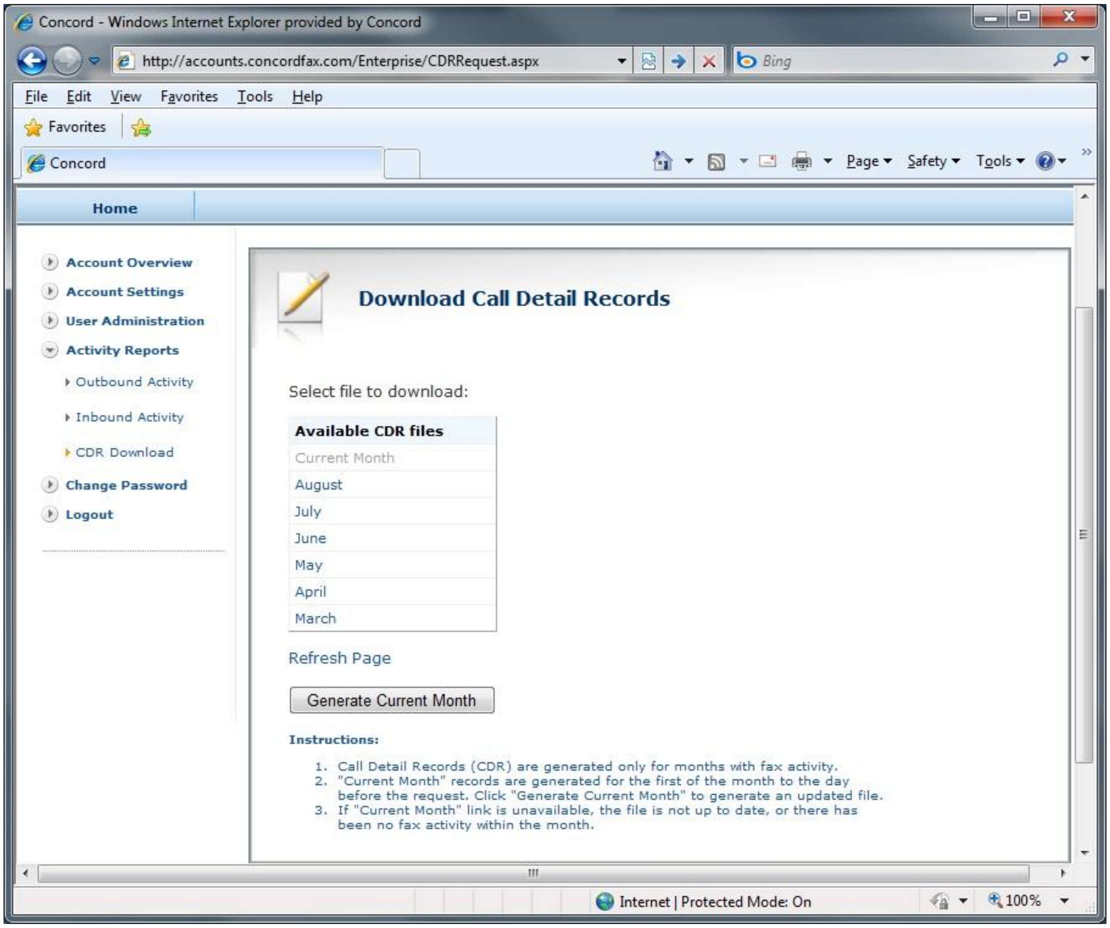
Suspend – this function temporarily disables the selected user's fax service, without actually deleting the user account.

Resume – reactivates the selected user's fax service, enabling it to return to a fully active state.

Reload – allows the screen to be refreshed.

Call Detail Records

Almost everything you need to know about Call Detail Records can be found on the Call Details link.



Monitoring Activity through the CDR

Concord Fax Online allows our customers to monitor and retrieve all of their inbound and outbound fax activity by a large number of fields from any or all of the prior 6 months, up to the last full day of faxing activity.

Many of the fields that can be retrieved by Call Detail Records are shown in the table below.

CompanyID	CountryCode	FaxPhoneNumber	TollFreeFlag
User ID	LastName	FirstName	EmailAddress
PageCount	Date	Time	TimeZone
FaxDestNumber	EventType Desciption	Subject	UserFields

Download Call Detail Records

When you login into the AAC there is a primary field called "Call Detail Records." This field offers downloadable access to the last 6 months of "Available CDR files." (See below)

In order for the "Current Month" to be created you must click on the "Generate Current Month" button. (see below)

Except for "Current Month," the records of each month of activity stored in Call Detail Records are found in a single file. The "Current Month" record is stored as a series of files, created every day there is activity. So, depending on which day you look there may be as many as 31 files.

Instructions are also found within the AAC (Call Detail Records/Download CDR).

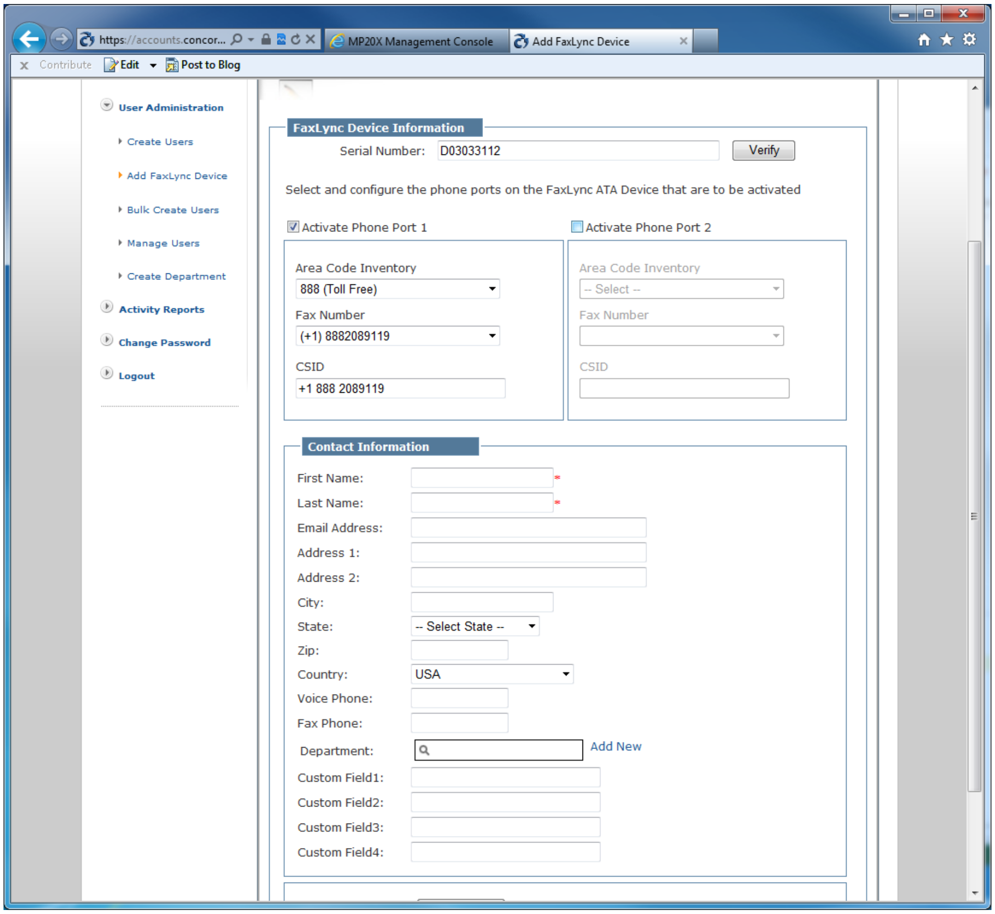
Add Inventory

When you login to your account there is a link under Account Overview called Add Inventory. (see image)

With **Add Inventory** you can add an Outbound Only license, or, International numbers, as well as toll free and local fax numbers to the Company account. If a local number is not available in your State you may choose to add a toll free fax number instead.

Configure a FaxLync Device

To configure a FaxLync device, simply select “Add FaxLync Device” from the User Administration Options.



Each FaxLync Device has a unique serial number that Concord uses to identify and send configuration data to, respectively. Each port can be assigned one fax number, making it possible to connect two fax machines to one FaxLync device. A FaxLync port can also be enabled for outbound (sending) faxing only, an actual fax number is only required to receive faxes. Each FaxLync device is required to have the First Name and Last Name field populated. Concord recommends the use of those fields to make it easier to identify a specific device in your logs and billing data. For example, “FaxLync” or “First Floor Main Fax.”

In many deployments, it might make sense to use Concord’s Fax to Email Service to receive faxes and save paper but enable a fax machine to send faxes. This configuration requires the combination of an outbound-only user license for FaxLync and a DID or toll-free number configured for inbound delivery via email.

To change a configuration at a later point, simply access “Manage Users” and look for the FaxLync device to be configured.

Once a FaxLync device has been newly configured, it might have to factory reset. This can be done by powering the device on while having the reset button pressed on the back of the device. Keep the button pressed for 20 seconds.

Getting Help

This section explains how you can contact Concord Technologies' Premium Support, for any questions you may have regarding your Fax Online account.

Contacting Concord Technologies Premium Support

Premium Support is available Monday through Friday, from 6:00 am to 5:00 pm, Pacific Time at 1 (800) 792-0329, or, 1 (206) 441-3346.

You may also contact us via email at **PremiumSupport@concordfax.com** and we will respond promptly.

Concord Fax numbers: 1 (800) 301-0329, or, 1 (206) 441-7965.

FAQs

We recommend that you visit our web site at **www.concordfax.com** for frequently asked questions (FAQs) regarding our services.

You will find FAQs at: **http://www.concordfax.com/support/faqs/default.aspx**