



Version 9.0
Activating and Using the
OCR Router Module

Edition

Information in this document applies to version 9.0 of the Guide for Activating and Using the OCR Router Module.

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Activating and Using the OCR Router Module

The RightFax OCR Router™ module uses optical character recognition (OCR) technology to convert the cover sheet of received faxes from a graphic format into text. The text on the cover sheet is then compared to a customized routing table that contains names and other text that identifies RightFax users in your organization. When a match is found, the fax is routed to the specified RightFax user. Optical character recognition with the OCR Router can be performed only on printed text and does not work with handwritten text.



Important *Because large organizations can have several members with the same or very similar names, OCR routing is not recommended as a primary routing method. For large organizations, Captaris recommends using OCR routing only as a backup for other fax routing methods (described in the RightFax Administrator's Guide). With other fax routing methods, a mailbox can be configured that receives all "lost" faxes whose intended recipient cannot be determined. These "lost" fax mailboxes can then be configured for OCR routing.*

Activating the OCR Router Module on the RightFax Server

The files required by the RightFax OCR Router Module are installed on all RightFax servers during the server installation. However, the OCR Router Module must be licensed and activated before its functionality will be enabled.

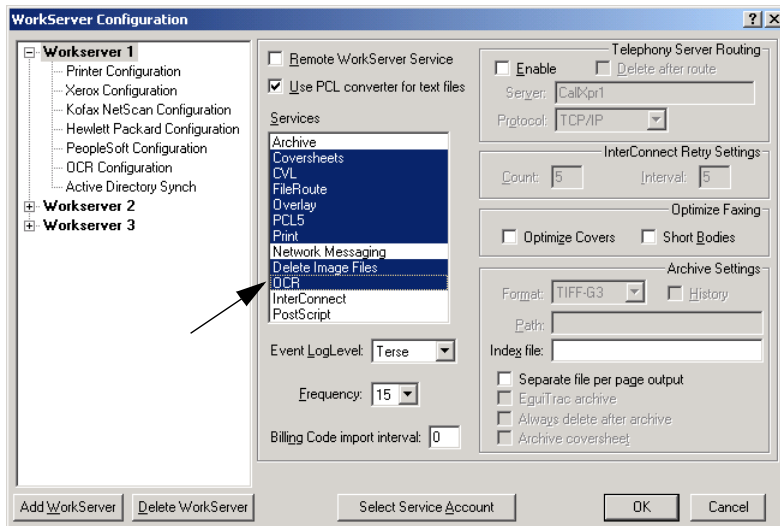
To activate the OCR Router Module, you must have licensed a RightFax server type that includes this module, or purchased and licensed this module separately. For information on activating new components on the RightFax server, refer to the *RightFax Installation Guide*.

After the RightFax OCR Router Module has been activated on the RightFax server, you must enable OCR processing on at least one RightFax WorkServer module (described in the next section) and configure RightFax to perform OCR routing.

Enabling OCR Processing on a WorkServer

After the OCR Router module is activated, run the WorkServer configuration program from Windows Control Panel on the RightFax server to display the **WorkServer Configuration** dialog box. In the component tree in the left pane, select the WorkServer that you want to perform OCR processing. You can enable OCR processing on as many WorkServers as you want.

Figure 0.1 The WorkServer Configuration dialog box



To enable OCR processing, click **OCR** in the **Services** list.

Configuring RightFax to Perform OCR Routing

After the OCR Router module is installed, you must configure RightFax for OCR routing of received faxes. First you must configure a “central” mailbox from which the faxes will be routed, and then you must create a custom routing table that contains RightFax user IDs and their associated text. When a fax arrives in the central mailbox, the cover sheet text is checked against the routing table for a match. If a match is found, the fax is routed. If no match is found, the fax remains in the central mailbox.

Creating and configuring the OCR central mailbox

To use OCR to route faxes to their intended recipients, the faxes must arrive in one or more “central” mailboxes. These mailboxes are configured so that all incoming faxes are rerouted using OCR routing.

To create a central mailbox for OCR routing, run Enterprise Fax Manager and add a new RightFax user called “OCR,” and then edit the user properties. Click the **Inbound Routing** tab, and enter “0” (zero) in the **Routing Code** box. This will cause all incoming faxes whose owners cannot be determined to automatically route to this mailbox. Next, click the **Inbound Routing** tab, and click **OCR** in the **Routing Type** box. This configures the mailbox to perform OCR routing on each received fax.



Note Only the central mailbox should have its **Routing Type** set to **OCR**. Do not set the routing type of individual RightFax user mailboxes to OCR or each user’s mailbox will attempt to reroute all received faxes, potentially creating endless routing loops.

In most cases, one central mailbox performing OCR routing is sufficient. If the needs of your organization require you to create *multiple* central mailboxes, each mailbox must have a routing code that corresponds to a channel extension configured in the BoardServer.

Creating the OCR routing table

The OCR routing table is a text file that is used by the OCR Router module to link text on the fax cover sheet to specific RightFax user IDs. This file must be called `Route.txt` and it must be located in the `RightFax\WorkSrv` folder on the RightFax server. A sample `Route.txt` file is provided in this folder for you to use as an example.

Each line of `Route.txt` must contain a separate entry in this format:

UserID MatchingText

Where *UserID* is the RightFax user ID to route to, and *MatchingText* is the fax cover sheet text that is associated with that user. The user ID and matching text must be separated by a single space. The matching text *may* contain spaces and other special characters. Here is an example of a short OCR routing table:

```
JCD Jane
JCD Doe
JCD Jane Doe
JCD Director of Marketing
JCD 555-1212
JSS John Smith
JSS 555-1000
```

The matching text must be matched exactly in order to route the fax. In this example, a match on the word “Smith,” if not preceded by “John,” will *not* be routed.

RightFax scans the routing table from top to bottom, routing the fax to the first match. For this reason, the order in which you list user IDs in this file may be important. You should place your highest priority user IDs (executive management, for example) at the top of the list so they will be sure to receive their faxes even if matching text conflicts with other users in your organization.

Creating alternate routing tables

If you have set up multiple central mailboxes for OCR routing, you can use a separate routing table for each mailbox. To specify a file name for the routing table other than `Route.txt`, run Enterprise Fax manager and edit the user ID for the mailbox. Click the **Inbound Routing** tab, and enter the file name for the routing table in the **Routing Info** box. The new routing table file must be located in the same `RightFax\WorkSrv` folder and use the same format as the `Route.txt` OCR routing file.

When you specify a new file name for the central mailbox routing table, you can also specify a RightFax user ID to which unmatched faxes will automatically route. After the file name, type a comma followed by the RightFax user ID of the user to route the unmatched faxes to. For example, if you have set up a special OCR central mailbox that only receives and routes faxes to the Sales department, you can specify a routing table called `Sales.txt` and have all unmatched faxes automatically route to Jane Doe the Sales Manager (whose RightFax user ID is JCD) by entering this line in the **Routing Info** box of the Sales central mailbox:

```
SALES.TXT,JCD
```

■ ■ ■



Note Because OCR routing requires an exact match between your OCR routing table and the cover sheet text, you should remove any blank spaces at the end of your OCR routing table entries. If the matching text includes trailing spaces, those spaces will be required as part of the text to match.

