



8.0 OCR Router, OCR Converter, and PDF Module Guide

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AGFA  **IntellFont**

Revision Number: 8.0 07/01
Printed in the United States of America.

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Introduction

The RightFax OCR Router™ uses optical character recognition technology to convert the cover page of a received fax from graphic format to text format, and then scans the text for recognized words. Each word or phrase on the cover page is compared to a custom routing table containing possible recipient names. If a match is found, the fax will be associated with an individual RightFax user ID and routed to that user.

The OCR converter module uses advanced optical character recognition technology to convert all the pages of a received fax from a graphic format to a text format. This allows fax recipients to easily edit the content of their received faxes.

The RightFax PDF module enables conversion of level 1 and level 2 PostScript® and PDF (portable document format) documents to TIFF format on the RightFax server for faxing. The RightFax server automatically determines when the document to convert is PostScript, PDF, or the standard PCL-5 format so no configuration on individual user workstations is necessary. When this module is installed, RightFax users can print PostScript and PDF documents directly to the RightFax print queue as well as send them as file attachments to e-mail messages when using one of the RightFax e-mail gateways.

Both OCR modules and the PDF module are included with the RightFax Enterprise Suite Server. For all other RightFax servers, these modules are sold separately.

Using This Guide

The *RightFax OCR Router, OCR Converter, and PDF Module Guide* is designed for use by RightFax administrators who will be installing and configuring either of the OCR and/or PDF modules. This guide assumes that you have a significant working knowledge of the RightFax server and your computer network, as well as your servers' operating systems and the conventions used by software applications designed for those operating systems.

Document conventions

Notes and warnings in this guide provide instructions for special circumstances, side effects and product interactions, and important reminders.

- Notes include information that you may find useful but do not affect the integrity of your computer hardware, software, or data.
- Warnings always indicate that failure to proceed carefully may result in loss of data or damage to hardware or software. Always read and understand warnings before proceeding.

`Courier` font is used in this guide to indicate text that you enter, command line text, or ASCII or other text. This font is also used to set examples off from the surrounding text. If the text contains variables (such as a command line with variable parameters), the variables are *italicized* and then described in the subsequent paragraph.

Other Resources for RightFax Users

Because your RightFax servers may support dozens, hundreds, or even thousands of fax users, RightFax has designed its end-user documentation to be thorough, easy-to-use, and easily accessible.

In addition to the user's guides, Quick Reference Cards cards give you quick and easy access to the most common fax management features of the FaxUtil, Microsoft Exchange, Lotus Notes, and Web Client fax client applications. These useful cards are compact and can be easily distributed throughout even the largest organizations.

Getting help online

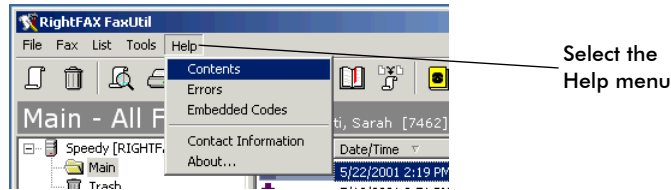
Most of the RightFax windows and dialog boxes include context-sensitive help. Typically, this help describes each field and option in a dialog box. This context-sensitive help can be launched from the question mark icon in the title bar of a dialog box.



Click the question mark icon

- Click this icon, and then click any option on the dialog box to view its definition.
- Or, press F1 to view a definition.

Online help for tasks or conceptual topics also is available. View this help by selecting the **Help** menu. You can browse the help for a topic or use the index to look up key words and terms.



The RightFax user guides are provided as Adobe Acrobat® portable document format (.pdf) files. Browse your product CD or your RightFax server for the Docs folder. The user guides also are available at the RightFax Web site at www.rightfax.com/support.

Adobe Acrobat is required to view the .pdf files, and it is included on your RightFax CD-ROM. Before viewing the files, you may need to install Adobe Acrobat on the computer where you want to view them.

The RightFax Web site offers the latest product information. Updated documentation, a searchable technical support knowledgebase, software downloads, and the latest product offerings are all online at www.rightfax.com.

Captaris Training Services

RightFax training gives you the skills to optimize your RightFax solution. Our comprehensive technical, administrative, and user training programs produce full utilization and understanding of RightFax products. Regular classes are held at the state-of-the-art RightFax Training Center in Tucson, Arizona, throughout the year, or you can choose the convenience of training at one of our regional locations. Training materials and computer-based training tools are also available. For more information on RightFax training, please visit our Web site at www.rightfax.com/training, or call us at (520) 320-7098 and let us help you develop a customized training plan for your organization.

Captaris Implementation Services

Captaris Implementation Services offers a team of highly skilled engineers who are experts in the deployment, implementation, and integration of RightFax solutions. Implementation services include installation and configuration, upgrades, configuration review, and advanced integration services. Whether it's through remote dial-in, an on-site implementation, or a combination of both, the

Implementation Services team can quickly integrate RightFax solutions with your existing applications.

Technical Support

Your *Customer Support Guide* includes detailed information about the support options available to RightFax customers. Please fill out the *RightFax Software Warranty & Registration Card* and return it immediately. If you have questions of a technical nature, contact your organization's RightFax administrator or network administrator before calling the RightFax technical support department. On the RightFax Web site, a database of technical support knowledge contains a wealth of information on installing, configuring, and maintaining RightFax software.

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7:00 A.M. to 3:00 P.M. Pacific time, Saturday

Support Plan Sales and Administration: (520) 320-7000

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Chapter 1

The OCR Router

The RightFax OCR Router uses advanced optical character recognition technology to convert the cover page of a received fax from a graphic format to a text format, and then scans the text for recognized words and phrases. Each word or phrase on the cover sheet is compared to a custom routing table containing possible recipient names. If a match is found, the fax will be associated with an individual RightFax user ID and routed to that user. Optical character recognition with the OCR Router can be performed only on printed text and does not work with handwritten text.

For large organizations, OCR routing should be used only as a backup for other inbound fax routing methods (described in the *RightFax Administrator's Guide*). With other routing methods, mailboxes can be configured that receive all "lost" faxes where the intended recipient cannot be determined. These lost fax mailboxes can be configured for OCR routing to maximize your automatic inbound routing functionality. However, because large organizations can have several members with the same or very similar names, OCR routing is not recommended as a primary routing method.

Installing the OCR Router

All OCR Router files are installed to the \\RightFax\OCR folder on the RightFax server. The Setup program also creates a sample Route.txt file in the \\RightFax\Worksrv# folder for the WorkServer number you select to execute the OCR process.

No installation or configuration on client workstations is required.

To install the OCR Router

1. Insert the OCR Router CD into the RightFax server. If autorun is not enabled, browse the CD-ROM and run Setup.exe.

If you have the RightFax Enterprise Suite CD, you can install the OCR Router directly from your CD. Run the Setup.exe program and select "RightFax Enterprise Suite" from the opening menu. Follow the prompts to the **RightFax**

Setup Selection dialog box. Select **Add a New Component** and select the **OCR Router** check box.

2. When prompted to select an OCR WorkServer, specify which WorkServer you want to execute the OCR process.
3. The Setup program will copy the router's files to the RightFax server. When all the necessary files have been copied, click **Finish** to complete the installation and quit the Setup program.

Configuring RightFax to Perform OCR Routing

After the OCR Router is installed, you can 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, it is automatically converted to text and 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 by default in the central mailbox.

Configuring the OCR central mailbox

In order to route OCR'd faxes to their intended recipients, the faxes must arrive in one or more "central" mailboxes. These are fax mailboxes that all incoming faxes go to, get OCR'd, and from there are routed to users' mailboxes.

For *multiple* central mailboxes, each mailbox should have a routing code that corresponds to a channel extension set up in the BoardServer. Usually, however, one mailbox performing OCR routing is sufficient. To configure a *single* central mailbox, edit the mailbox owner's user ID in Enterprise Fax Manager, click the **Inbound Routing** tab, and enter "0" (zero) in the **Routing Code** box. This will cause all incoming faxes to route into that mailbox by default.

For each central mailbox you create, edit the mailbox's user ID in Enterprise Fax Manager, click the **Inbound Routing** tab, and click **OCR** in the **Routing Type** box. This tells the mailbox to perform OCR on each received fax and route accordingly.

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

Creating the OCR routing table

The OCR routing table is used by the OCR router to link text in the fax with RightFax user IDs for routing. On your RightFax server, create an ASCII file called Route.txt in the \\RightFax\Worksrv# folder (where # is the WorkServer

number you added OCR functionality to). If you added OCR to multiple WorkServers, you must create this ASCII file in each WorkServer's folder.

The Route.txt file is your OCR routing table. Each line must contain a separate entry in the format `UserID MatchingText`, where *UserID* is the RightFax user ID to route to, and *MatchingText* is the OCR'd text that, when found, will route the fax to that user. The user ID and matching text must be separated by a single space, and the matching text *may* contain spaces and other special characters. Here is an example of a short OCR routing table:

```
ADJ Aaron
ADJ Aaron Jones
BDS Bill Street
DRR David Renner
DRR Renner
```

Note Because OCR routing requires an exact match between your OCR routing table and the OCR'd 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.

The matching text must be matched exactly in order to route the fax. In this example, a match on the word "Jones," if not preceded by "Aaron," would *not* be routed.

Because RightFax scans the routing table from top to bottom, routing the fax to the first match, the order in which you list user IDs may be important. You may want to 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 exist with other users on your network. This, however, also increases their likelihood of receiving misrouted faxes.

Creating alternate routing tables

When routing faxes, OCR central mailboxes by default use a routing table called Route.txt located in the `\\WorkServer#` folder of the WorkServer performing the OCR conversion. In cases where you have set up multiple OCR central mailboxes, you can specify a different routing table file name for each mailbox. This lets each central mailbox use a separate routing table for maximum routing accuracy.

To specify a central mailbox's routing table file name, edit the mailbox's user ID in Enterprise Fax Manager, click the **Inbound Routing** tab, and type the file name in the **Routing Info** box. The new routing table file must be located in the same `\\WorkServer#` directories and have the same format as the Route.txt OCR routing file.

When you specify a routing table file name in the central mailbox's **Routing Info** box, 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 (RightFax user ID, JANED) by entering this line in the **Routing Info** box of the Sales central mailbox:

```
SALES.TXT, JANED
```

■ ■ ■

Chapter 2

The OCR Converter

The RightFax OCR Converter™ uses optical character recognition technology to convert received faxes from a graphic format to a text format, and then saves a copy of the text file with the fax. This allows fax recipients to easily edit and work with the content of their faxes. Fax clients can be set to automatically convert all received faxes, or users may choose to convert only selected faxes.

Optical character recognition with the OCR Converter can be performed only on printed text and does not work with handwritten text.

Installing the OCR Converter

All OCR Converter files are installed to the \\RightFax\OCR folder on the RightFax server. No installation on client workstations is required.

To install the OCR Converter

1. Insert the OCR Converter CD-ROM into the RightFax server. If autorun is not enabled, browse the CD and run Setup.exe.

If you have the RightFax Enterprise Suite CD, you can install the OCR Converter directly from your CD. Run Setup.exe and select "RightFax Enterprise Suite" from the opening menu. Follow the prompts to the **RightFax Setup Selection** dialog box. Select **Add a New Component** and select the **OCR Converter** check box.

2. When prompted to select an OCR WorkServer, specify which WorkServer you want to execute the OCR process.
3. The Setup program will copy the Converter's files to the RightFax server. When all the necessary files have been copied, click **Finish** to complete the installation and quit the Setup program.

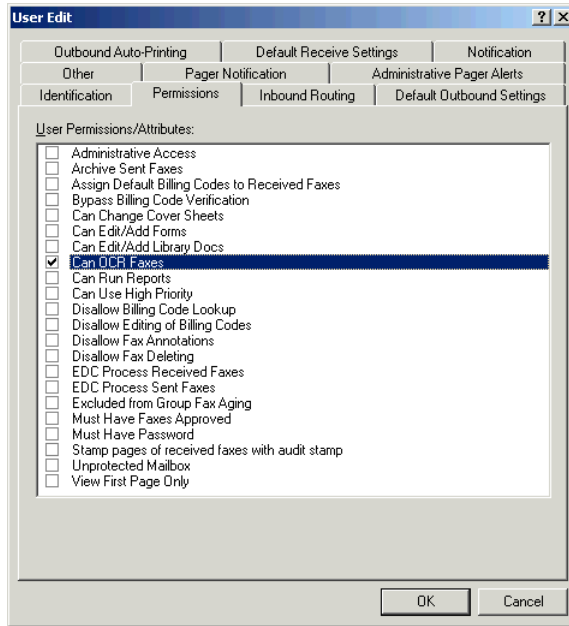
Configuring RightFax Users for OCR Conversion

After the OCR Converter is installed, you can configure RightFax users for OCR conversion of received faxes. Each individual RightFax user must be given rights to perform OCR conversion. Because the OCR process is extremely processor intensive, you may choose to restrict OCR rights if the machine on which the WorkServer handling OCR is installed does not have sufficient free resources.

Granting users OCR access in Enterprise Fax Manager

To give a RightFax user OCR rights, run Enterprise Fax Manager, and double-click the user to open the **User Edit** dialog box. Click the **Permissions** tab and select the **Can OCR Faxes** check box.

Figure 2.1 The Can OCR Faxes Check Box



Configuring users for automatic OCR conversion of all received faxes

To configure a user for automatic OCR conversion of all received faxes, run Enterprise Fax Manager, and double-click the user to open the **User Edit** dialog box. Click the **Default Receive Settings** tab.

Figure 2.2 The Default Receive Settings Tab

The screenshot shows the 'User Edit' dialog box with the 'Default Receive Settings' tab selected. The dialog is divided into three main sections:

- Automatic Forwarding Options:**
 - Enabled?
 - Forwarding Type:
 - Phone number:
- Automatic Printing Options:**
 - Enabled?
 - Printer:
 - Resolution:
- Automatic OCR Options:**
 - Enabled?
 - Extension: Format:
 - Layout:

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Under **Automatic OCR Options**, select the **Enabled** check box to automatically convert all received faxes using OCR. Enter a three-letter file extension for the output file in the **Extension** box.

In the **Format** box, select the text format used to interpret your fax pages. “ASCII” produces a plain text file. “Smart ASCII” approximates the original format. “RTF” (rich text format) preserves fonts and formatting but is only available to Windows users.

In the **Layout** box, select how you want the text to be formatted on the page. “WYSIWYG” will try to read the fax in the layout it sees. If, for instance, RightFax sees that the fax has three columns, it will try to read the document in column style. “Left Justified” displays the text starting from the left margin of the fax.

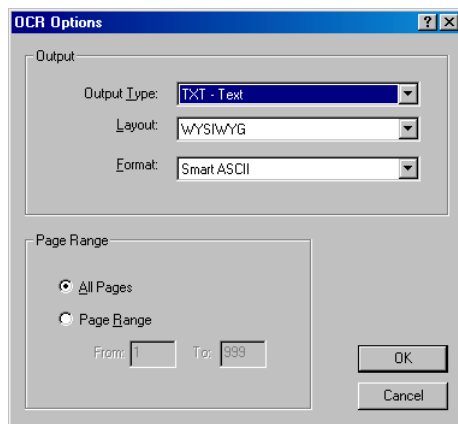
Configuring OCR Options in FaxUtil

The RightFax fax client, FaxUtil, also includes several OCR options that can be set by individual fax users. You must install the FaxUtil client on each user’s workstation for these options to be available.

Converting individual faxes in FaxUtil

RightFax users who have been granted permission to OCR received faxes can convert individual faxes as needed from their FaxUtil mailboxes. To convert a received fax in FaxUtil, click the fax to convert and select **OCR** from the **Fax** menu. This opens the **OCR Options** dialog box.

Figure 2.3 The OCR Options Dialog Box



Output Type. Click the file extension to use when creating the text file.

Layout. Click the format for the text on the page. “WYSIWYG” will try to read the fax in the layout it sees. If, for example, RightFax sees that the fax has three columns, it will try to read the document in column style. “Left Justified” displays the text starting from the left margin of the fax.

Format. Click the text format used to interpret your fax pages. “ASCII” produces a plain text file. “Smart ASCII” approximates the original format. “RTF” (Rich Text Format) preserves fonts and formatting.

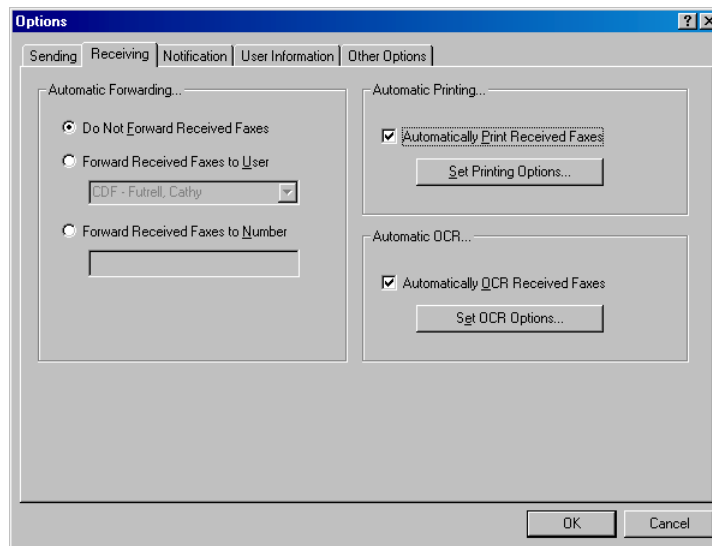
Page Range. Convert the entire file, or specify the specific page range to convert. Specifying a page range is especially useful if you want to convert only a small part of a very large fax.

Select the conversion options you want and click **OK** to convert the fax. The OCR job will be queued on the RightFax server for conversion. The conversion process time depends on the length of the fax you are converting and the workload on the WorkServer performing the conversion. When conversion is complete, the FaxUtil mailbox will indicate that the converted fax now has a text file associated with it (see “Receiving OCR Text Files” on page 17).

Configuring FaxUtil to convert all received faxes

RightFax users who have been granted permission to OCR faxes can configure their FaxUtil mailboxes to automatically OCR all received faxes. In FaxUtil, select **Options** from the **Tools** menu, and then click the **Receiving** tab.

Figure 2.4 The Receiving Tab



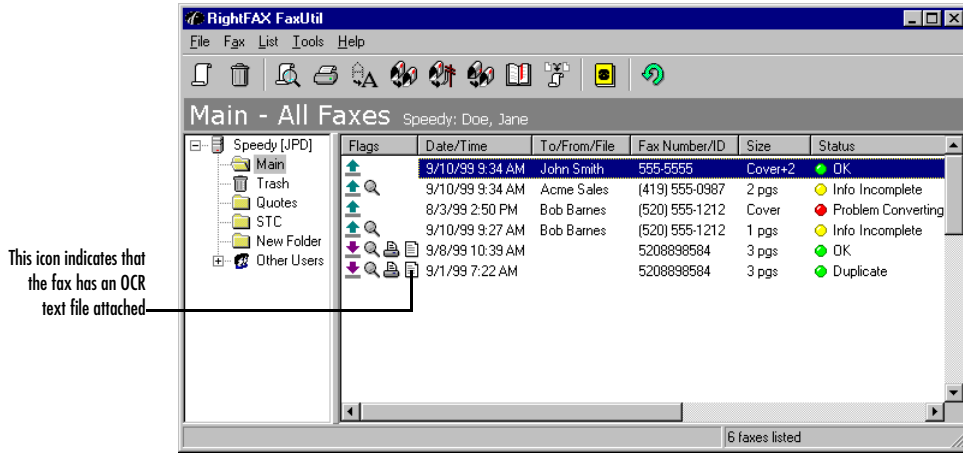
Select the **Automatically OCR Received Faxes** check box, and then click **Set OCR Options**. This opens the **Automatic OCR Options** dialog box (see ["Converting individual faxes in FaxUtil"](#) on page 16).

Receiving OCR Text Files

How you receive OCR-converted faxes depends on which fax client application you use. If you use an e-mail application as your fax client (such as Microsoft® Exchange or Lotus® Notes®), OCR-converted faxes will arrive as file attachments to e-mail messages along with the associated fax image file. These text file attachments can be viewed and edited exactly like any other e-mail attachment.

If you use FaxUtil as your fax client, OCR-converted faxes are stored in the RightFax database along with their associated fax image files. If a fax has an associated OCR text file, a special OCR icon will appear next to the fax entry.

Figure 2.5 The OCR Icon in FaxUtil



When you view the fax, a dialog box will appear asking whether you want to view the fax image or the OCR text file. If you select the text file, RightFax will automatically open whatever application is associated with the file's extension and load the file.

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Chapter 3

The PDF Module

This software is based in part on the work of the Independent JPEG Group.

The RightFax PDF module enables conversion of level 1 and level 2 PostScript and PDF (portable document format) documents to TIFF format on the RightFax server for fax transmission. No configuration on the RightFax server is necessary because the server automatically determines whether the document to convert is PostScript, PDF, or the standard PCL-5 format. When this module is installed, RightFax users can print PostScript and PDF documents directly to the RightFax print queue and send them as file attachments to e-mail messages when using one of the RightFax e-mail gateways.

The RightFax PDF conversion engine does not support conversion of PDF files that contain embedded TrueType (CID) fonts that use "Identity-H" encoding.

Installing the PDF Module

The PDF module installs interpretation and conversion files into all \\RightFax\Worksrv# and \\RightFax\Gateway# directories on the RightFax server and creates an additional \\RightFax\Fonts folder for storing font information.

To install the PDF module

1. Insert the PDF module CD-ROM into the RightFax server. If autorun is not enabled, browse the CD and run Setup.exe.
2. If you have the RightFax Enterprise Suite CD, you can install the PDF module directly from your CD. Run the Setup program and select "RightFax Enterprise Suite" from the opening menu. Follow the prompts to the **RightFax Setup Selection** dialog box. Select **Add a New Component** and check the **PDF** option.
3. When prompted to select a PDF WorkServer, specify which WorkServer will execute the PDF conversion processes.

4. The Setup program will copy the module files to the RightFax server. When all necessary files have been copied, click **Finish** to complete the installation and quit the Setup program.

Adding PostScript Fonts

To correctly convert Type 1 PostScript fonts in PostScript and PDF files, the fonts must be copied into the `\\RightFax\Fonts` folder. When it is installed, the RightFax PDF module supports 35 basic PostScript fonts including Times, Helvetica, Courier, and Symbol.

To add additional font conversion support, copy the PostScript fonts you want to support into the `\\RightFax\Fonts` folder on the RightFax server. Be sure to include both the `.pfm` and `.pfm` components of the PostScript fonts.

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