

OCR Router

Revised 10-24-2008

Purpose of OCR Router

OCR Router is a software utility that reads the text of a facsimile and delivers it based upon the contents contained within it. The text is created by Microsoft Office Document Imaging a required component of OCR Router.

The delivery functions are to a file folder, printer or email address. The user also has the ability to convert the facsimile into a PDF as well.

This instruction manual will go over how to setup and use OCR Router with Microsoft Fax. Any software that receives the facsimiles can be used in place of Microsoft Fax.

System Requirements:

Java
Microsoft Office Document Imaging
A method of receiving facsimiles

Setting up Microsoft Fax

Microsoft Fax a component of Windows XP Professional can be used to acquire facsimiles for OCR Router.

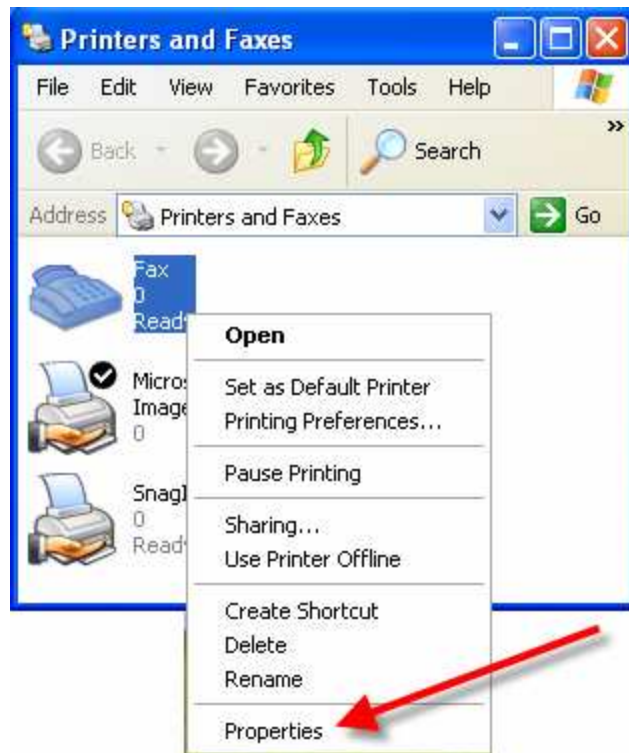
Begin by clicking on Start \ All Programs \ Printers and Faxes



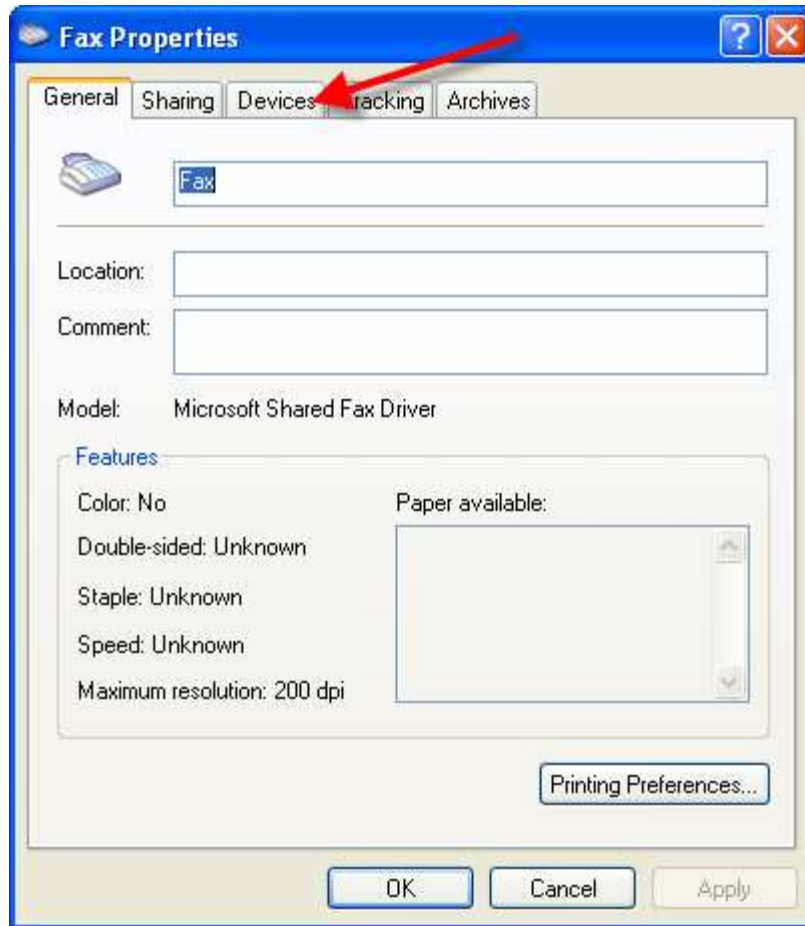
Look for Fax



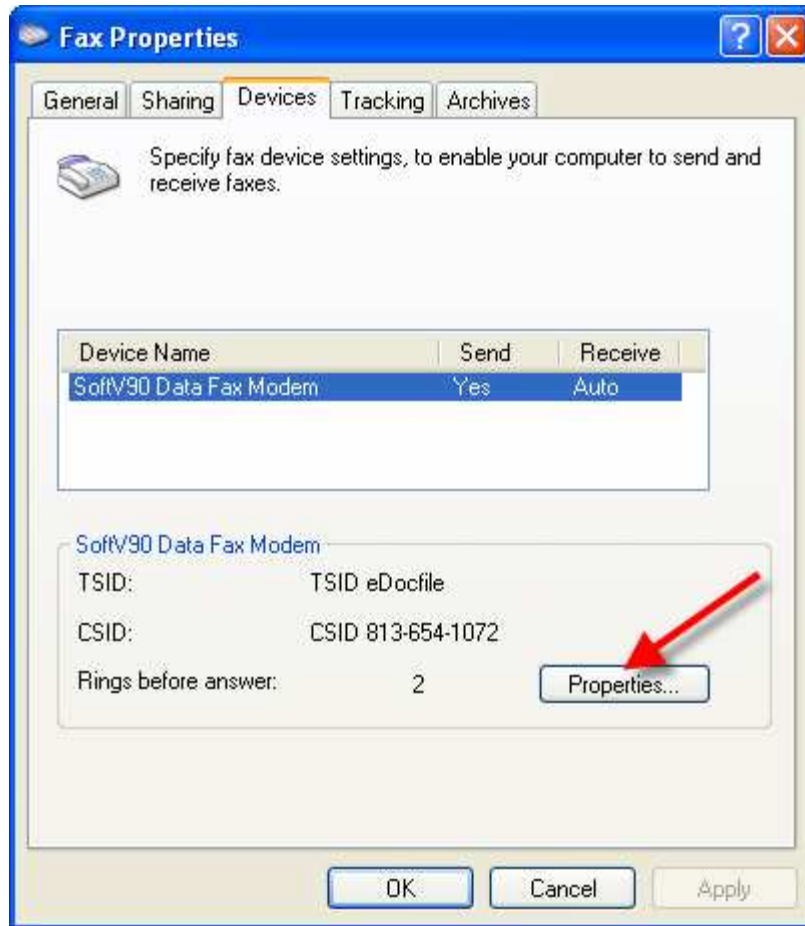
Right click on Fax and select Properties



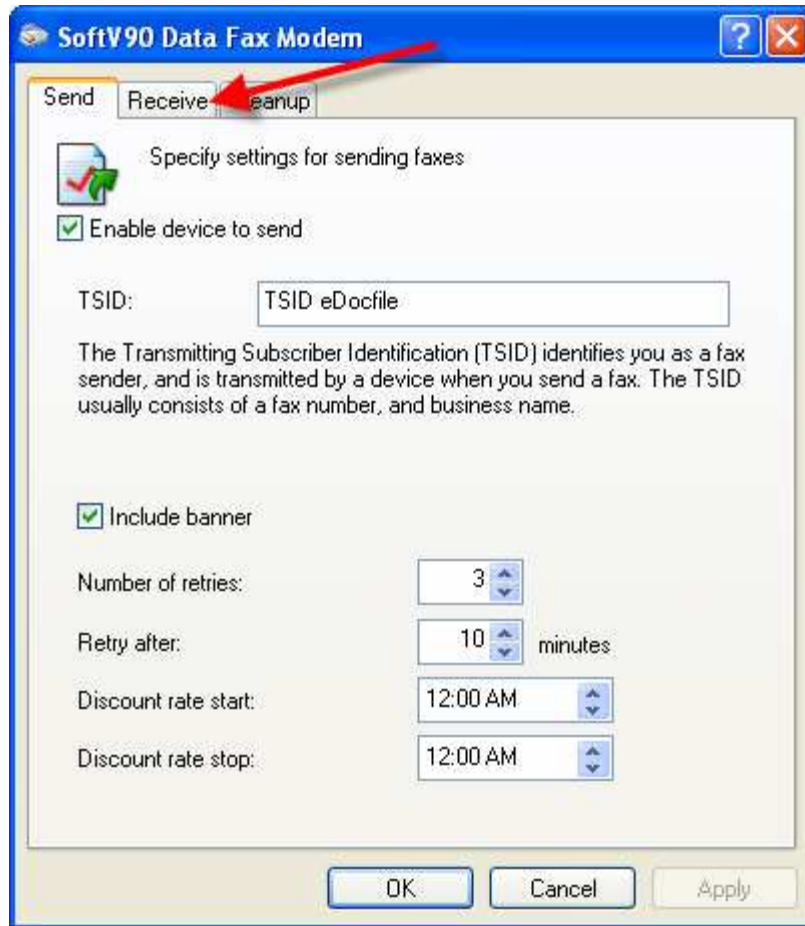
Select Devices



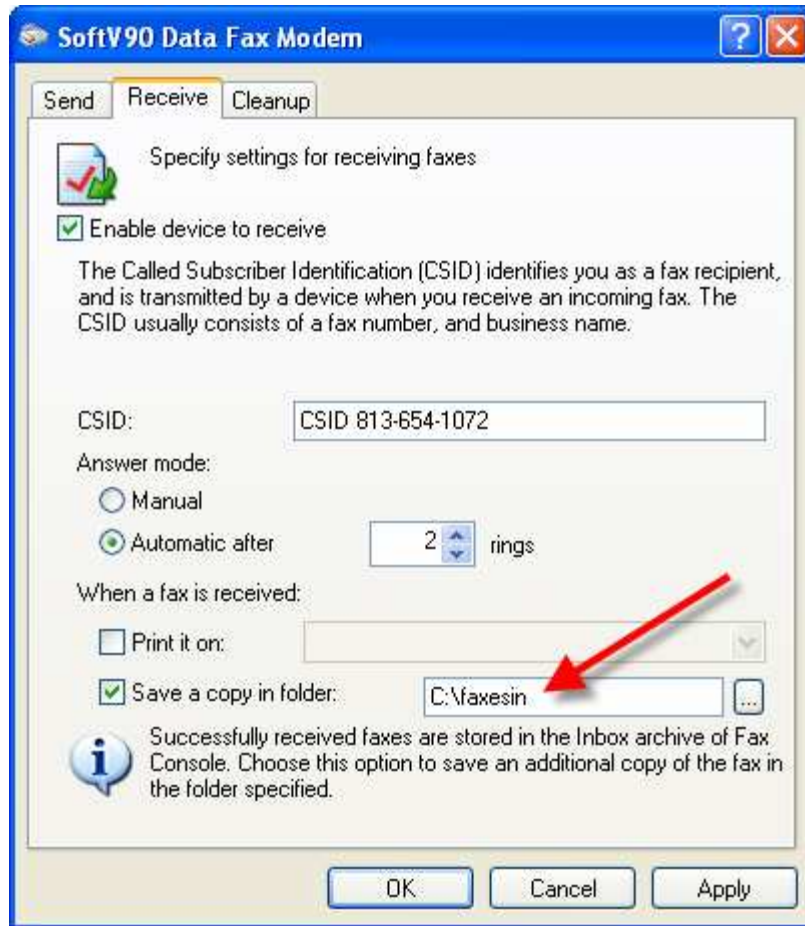
Click on Properties



Click on Receive



Place a check in the box “Save a copy in folder” and browse to a storage location



Click on Apply, then OK and OK again to save the settings and exit

Setting up OCR Router

Begin by clicking on Start \ All Programs \ OCR Router \ Setup \ Setup OCR Router



The Setup TSID Router Menu will open

Setup OCR Router

Input Files

1 15 Enter in Seconds how often to check for new Facsimiles

C:\faxesin 2 Input Folder

Archive Files

3 Tiff Archive File Type C:\faxarchive 4 Archive Folder

//athlon/faxarchive 5 UNC Path

Failed Files

6 Save Failed files in a Folder

C:_failed 7 Output Folder

8 eMail Failed Files 10 Print Failed Files

eMail Address Printer Output Type

9 kpassaur@edocfile.com 11 SnagIt 8 12 Tiff

Rules

Enter Rules for the data contained in the Fax Header in the following format
 Search String ~ File Folder - eMail address - Printer ~ File type - Printer Name or Link
 Separate Search Strings with an "&"
 Rules are case sensitive see Help for examples

Joe&Keith&Sam~kpassaur@edocfile.com~Link
 Darryl~sales@edocfile.com~Tiff

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Help Save Exit

1. Enter the time that the program should wait before checking for incoming Faxes. The time is entered in seconds so to check every 2 minutes enter 120.
2. Browse to the path that contains the facsimiles.
3. Enter a file format **for all** facsimiles to be saved in.
4. Enter a folder to save facsimiles in, please note that all facsimiles will be saved in this folder in the format selected in option 3
5. Enter the UNC path to the Archive Folder, This will be used as the path when sending links to recipients as opposed to sending the fax as an attachment.
6. If failed files are to be saved in a file folder place a check mark in this box. (please note there are three options for failed files)
7. If failed files are to be saved in a folder enter the path here

8. If failed files are to be emailed to someone for distribution, place a check mark in this box
9. Enter an email address for the failed files to be delivered to.
10. If failed files are to be printed place a check mark here
11. Select the printer that failed files should be printed on.
12. If failed files are to be saved or emailed select in which format, Tiff or PDF
13. Enter the rules for processing the facsimile.

Example of Rules:

Please note that all Rules are Case Sensitive and that as many as necessary can be used.

The format is as follows:

Text to search for~What to do with the file~Output

The text to search –	~ What to do with the file ~	Output
<p>It can be any word, phrase or combination of words and phrases separated by an "&" so "Keith&Sales Manager" would look for the word "Keith" and the phrase "Sales Manager" and if either were found the rule would be applied.</p>	<p>The file can be saved to a folder, sent to a printer or emailed. Just enter the folder location, the email address or the word Printer if it is to be printed.</p>	<p>The output can be a PDF, Tiff, Link to the file or the Name of the Printer. If using a link the link will go to the archive folder file, even if there is a rule that has the file go into a specific folder.</p>

All Rules are Case Sensitive

Example 1: Current Solutions~kpassaur@edocfile.com~PDF

If "Current Solutions" was in the document it would email the file to kpassaur@edocfile.com as a PDF

Example 2: Current Solutions~kpassaur@edocfile.com~Link

If "Current Solutions" was in the document it would email a link to facsimile to kpassaur@edocfile.com

Example 3: 8139963222~C:\Sales Orders~Tiff

If 8139963222 was in the document it would be moved to the folder c:\Sales Orders and saved as a Tiff image

Example 4: Current Solutions~Printer~OKI C7200(PCL)

If "Current Solutions" was in the Fax Header it would be printed on the OKI c7200(PCL) printer

If the lines in Example 1 and Example 3 were both used the file would be emailed to kpasaur@edocfile.com and the file would also be printed.

14. Help – Save – Exit

When finished entering the rules click on Save



The open Mail Settings prompt will appear. Click on Yes if a mail option is to be used for delivery or no to Exit.

Setting up Mail

Click on Start / All Programs / OCR Router / Setup / Setup OCR Router Mail



The setup eMail Window will appear

e-Mail Notification Setup

SETUP OCR ROUTER MAIL

Mail Server 1

From Address 2

From Name 3

SMTP User ID 4

SMTP Password 5

Port 6

7 SMTP Authentication Required

8 Show Send Status Window

Test 9

Exit 10

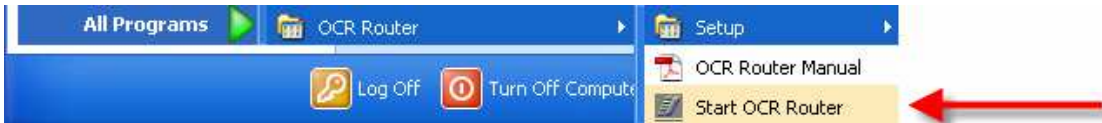
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1. SMTP Mail Server Name
2. From Address that will appear on eMail
3. From Name
4. SMTP User ID
5. SMTP Password
6. The Port to Access your mail
7. Place a check mark if SMTP Authentication is Required
8. Place a check mark to display a small Window in the Top Left of the users screen showing when eMail is in the Process of being sent.
9. Test the eMail Settings
10. Exit – the last tested settings will automatically be saved. Therefore, after entering the settings, test them before exiting.

When finished click on Exit

Running the Program

Click on Start / All Programs / OCR Router / Start OCR Router



An Icon will appear in the SysTray



The user can Right Click on the Icon to Stop or Exit the Program



If it is stopped there will be an "X" on top of the Icon



To restart it right click on the Icon and choose



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