



FACSys® 5.1

ROUTING

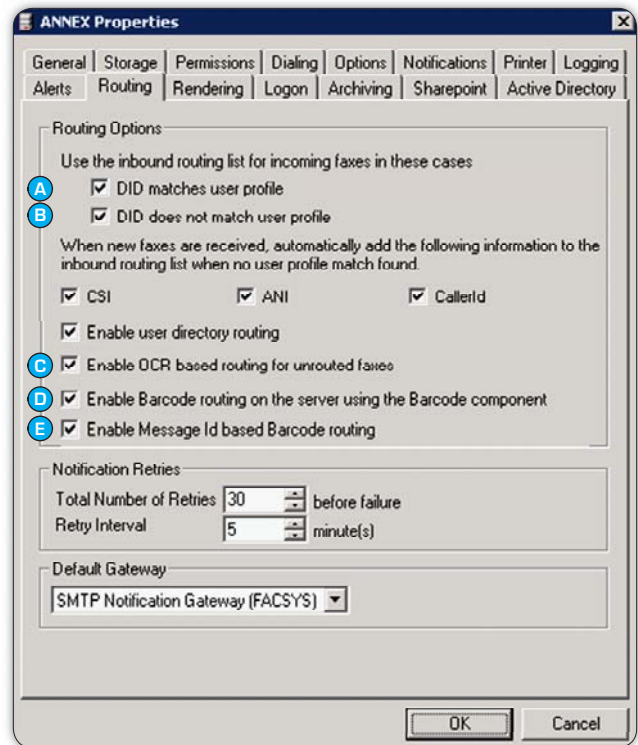
This document outlines the various types of Routing available in FACSys® 5.1 Enterprise.

FACSys® 5.1 Enterprise uses the following methods to route transmissions:

- **DID/DTMF/DNIS**
 DID is Direct Inward Dialing
 DTMF is Dual Tone Multi-Frequency
 DNIS is Dialed Number Identification Service
- **CSI (CALL SUBSCRIBER IDENTIFICATION) ROUTING**
- **OCR (OPTICAL CHARACTER RECOGNITION) ROUTING**
- **BARCODE ROUTING**
- **ANI/CALLER ID ROUTING**
- **LINE ROUTING**

The above mentioned routing options are configured in multiple places. The settings to configure the various options are shown on the right:

SERVER PROPERTIES/ROUTING TAB

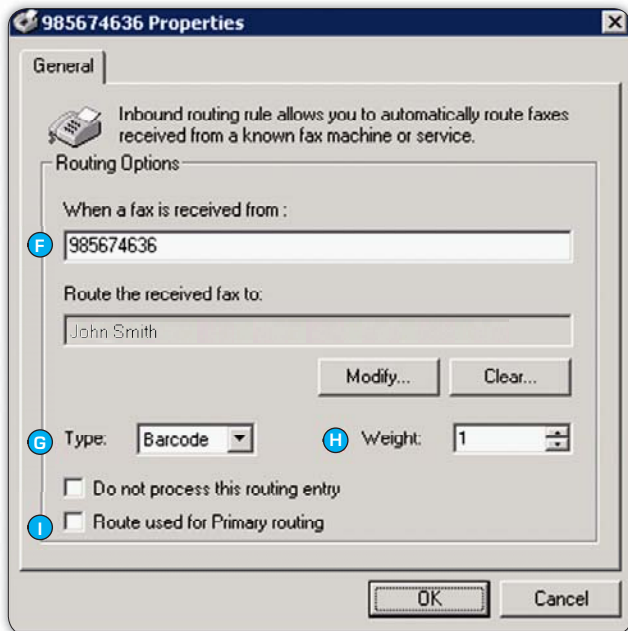




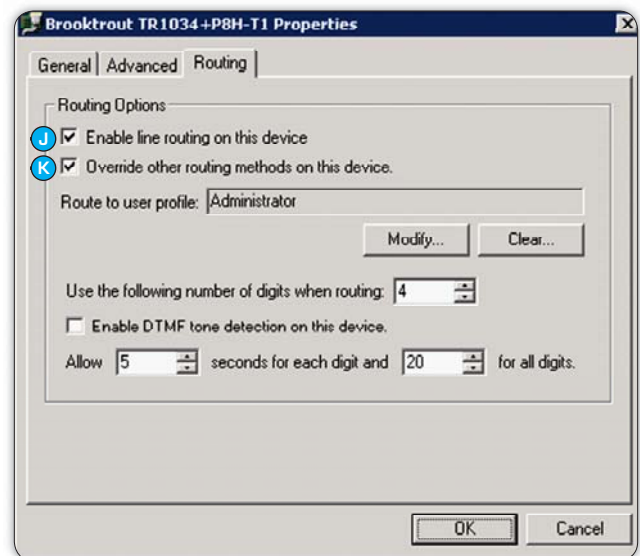
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ENTRY IN THE INBOUND ROUTING LIST



THE ROUTING TAB IN THE DEVICE PROPERTIES



There are also registry entries that affect the routing process:

HKLM\System\CurrentControlSet\Services\FaxServer\System\Barcode

1. If the DID/DNIS/DTMF information is not found or does not match a user profile, allow the server to route the fax if a barcode is found and matches a user profile **(R1)**
2. Even if the DID/DNIS/DTMF information is found and matches a user profile, allow the server to override it and route the fax if a barcode is found and matches a user profile **(R2)**



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First, the server will check if the Message ID based barcode routing is set to **on**. If the option is on and a barcode found matches a fax sent, the inbound fax will be routed to the user profile that has sent the original fax. It will also be placed under the same subfolder in the FACSys® Desktop Client as the original message, otherwise it will proceed to the next step. **(E)**

Next, the server will check whether it is allowed to route using the barcode information in the user profile and whether a barcode found in the inbound fax matches that information. The two registry settings specified earlier **(R1)** and **(R2)** control the utilization of the user's barcode information both when the DID/DNIS/DTMF information matches a user profile as well as when it does not match a user profile.

If the inbound fax contains DID, DNIS or DTMF routing information that matches a user account, the next option examined is the Inbound Routing List. The following rules are taken into consideration:

- Enable Inbound Routing List for incoming faxes when DID matches a user profile (in the server settings, Routing tab) **(A)**
- The entries in the Inbound Routing List, which can match different parameters of the inbound fax (DID, ANI, Caller ID, Barcode) and can also be assigned different weights in case more than one entry matches **(F,G,H)**
- The option "Route used for primary routing" in the matching entries from the Routing list that match the inbound fax parameters **(I)**

If any of these options are NOT enabled or there is no match, the message will be routed using DID, DNIS, DTMF.

If all options are enabled and a match was found in the Inbound Routing List, the server will still check if the Line Routing is enabled **(J)** and configured to override other routing methods **(K)**. If both of these conditions are true, then Line Routing will be used, otherwise the winning entry in the routing list will be used.

When the DID, DNIS or DTMF is not found in the inbound fax or it does not match a user profile, the server will verify the Inbound routing list settings for this case:

- Enable Inbound Routing List for incoming faxes when DID does not match a user profile (in the server settings, Routing tab) **(B)**
- The entries in the routing list, which can match different parameters of the inbound fax (DID, ANI, Caller ID, Barcode) and can also be assigned different weights in case more than one entry matches **(F,G,H)**

NOTE: The option "Route used for primary routing" in the matching entries from the Routing list does not matter in this case.

If all options are enabled and a match is found in the Inbound Routing List, the server will still check if the Line routing is enabled **(J)** and configured to override other routing methods **(K)**. If both of these conditions are true, then Line Routing will be used, otherwise the winning entry in the routing list will be used.



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If the option **(B)** is not enabled, or a match is not found, then the server will use the Line Routing option **(J)**. If the feature is enabled, then Line Routing will be used to route the fax (please note that the option “Override other routing methods” **(K)** does not matter in this case).

If Line Routing is not enabled on the Device that received the fax, the only routing method left is OCR routing.

NOTE: The Microsoft® Office Document Imaging component MUST be installed on the FACSys® Server. This is part of the Microsoft® Office 2003 System.

On the **Server Properties, Routing** tab, there is an option **Enable OCR based routing for unrouted faxes (C)**. If this option is enabled, the server will attempt OCR routing:

- OCR Routing uses only the first page of an Inbound fax. It first checks for a file **OCRKeys.ini** in the FACSys® Services directory. (The default location for this file is **c:\Program Files\FACSys\FACSys Services**).

The example of the OCRKeys.ini file is:

```
[0]
Keyword=To:
Confidence=50
[1]
Keyword=From:
Confidence=0
[2]
Keyword=Project:
Confidence=75
```

If it is available, then the keywords are listed in that text file. There is a confidence level attached to each of the keywords: 100 is the highest possible level assigned and 0 is the lowest. In the previous example, if a document has the words **To**., **From**.: and **Project**: in it, the fax is routed based on the higher-confidence keyword (**Project**:)

If the file is not available, the default action is to search for **To**., **Recipient**: and **Fax**:

If the OCR'd text from the first page matches any of these keywords, then the next word is used for comparison. In our example, the keyword, **Project** is used. With **Project: WTB1234**, the string **WTB1234** would be checked to see if it matches the following fields in the FACSys® User Profile: **alias, display name, first name, last name or fax number** (in that order).

As soon as there is a match in one of the FACSys® User Profile fields, the routing information pertaining to that FACSys® User will be applied to the fax message to send it to the appropriate destination.



TIP:

You can add, for example, “Project:” as a keyword and then add a user for each distinct “Project:” (i.e. User WTB1234 will be added to the User Profiles section of the FACSys® Administrator).

Any inbound fax to a target OCR Value of Project: WTB1234, can then be routed to the User WTB1234. This fax message will then be re-routed to an e-mail address or a public folder for grouping of ‘like-kind’ documents.

If none of the keywords are matched (i.e. Dept=Accounting), then the first 3,800 characters are used for comparison. Again, the FACSys® User Profiles fields (alias, first name, last name or fax number) are examined to see if there is a match with any words within those 3,800 characters. If there is a match, the fax message is routed to the appropriate destination. If there is no match, the fax is sent to Unrouted.



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