

Advanced Fax Routing Option User's Guide

December, 2006 Revised Edition

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Using the Advanced Fax Routing Option

Note: If you are adding the Advanced Fax Routing option to a previous installation of FAXCOM Suite for Windows, run the installation again, choose the *Modify* radio button, and specify the Serial Number and Authorization Code information from the Base License Information sheet packaged with the Advanced Fax Routing option.

Overview

By extending fax routing capabilities, the FAXCOM Suite for Windows Advanced Fax Routing option enables fax processing to be included in business workflows.

Specifically, the Advanced Fax Routing option is a rules-based utility for specifying actions that automatically route incoming faxes. The rules that specify actions whereby incoming faxes can be automatically routed can be divided into the following categories:

Rules that extract information from the fax image to control the final route of the fax:

Extract barcode and create variable -- use Barcode Recognition to retrieve information from a Barcode in order to create a *variable*

Extract text and create variable -- use Optical Character Recognition to retrieve information from a fax image in order to create a variable (i.e., a placeholder that holds the data assigned to the placeholder)

Extract text listed in text file and create variable -- retrieve a list of text strings from a text file to find in the image in order to create a variable

Rules that extract information from network resources, or message existing data:

Reformat -- reformat received fax data, including fax properties and user-created variables

Look up in LDAP and create variable(s) -- retrieve information from an LDAP directory in order to continue acting upon a fax

Look up in text file table and create variable(s) -- retrieve information from a text file in order to continue acting upon a fax

Look up in ODBC and create variable(s) -- retrieve information from a database in order to continue acting upon a fax

Clear all values in a user-created variable -- remove all data currently assigned to a variable (i.e., a placeholder that holds the data assigned to the placeholder)

Rules that control how and where a fax is delivered:

Add note to document -- add a relevant comment to a fax

Delete fax -- discontinue any further routing of a fax and remove it

e-Mail -- forward a fax to a valid email address

Print -- send a fax to a printer

Rename document -- change a previous name of a fax

Route to other users -- forward a fax to other fax service users

Save in network folder -- save a fax in a UNC location

Save in sub-folder -- save a fax in a folder created under a pre-existing FAXCOM Client Mailbox folder

Split fax into separate documents -- create multiple documents from a single fax

Write ODBC -- write information to a database

When creating rules, you have the following choice:

- Specify that the rule applies to received faxes that match the specified conditions
- Specify that the rule applies to all received faxes

Before using Advanced Fax Routing, it is suggested that you understand its basic concepts, and the terminology it uses – as explained in the immediately following sections.

Understand Basic Concepts of Advanced Fax Routing

The Advanced Fax Routing capabilities depend on the following considerations:

- Whether you are a fax service administrator who accesses the utility through the FAXCOM Suite for Windows MMC
- Whether you are an individual user who accesses the utility through the FAXCOM Client

As the administrator, you can create rules that execute all available actions. Moreover, you can manage (edit/delete) rules created by individual FAXCOM Client users, and create additional rules to be executed either *before* (pre) or *after* (post) execution of the user-specified rules.

Individual users, however, have the *Tools...Advanced Fax Routing* menu selection *only if* you, as the administrator, has configured them for access to the utility.

Moreover, when users are configured to perform *only* the Basic Advanced Fax Routing rules, they use the more simplified Fax Rules wizard to create the rules, described in the *FAXCOM Client User's Guide* (and within the online help).

When users are configured to perform additional Advanced Fax Routing rules (OCR/Barcode/LDAP/ODBC/Fax Splitting) they use the complete Advanced Fax Routing utility. Information for using the complete Advanced Fax Routing utility is in this guide and as online help.

Even when you grant a user access to the utility, you can control which actions he/she can select, where the basic set he/she can execute are the following Personal Rules:

email to people or distribution list – forward a fax to a valid email address or distribution list (a collection of contact email addresses)

Print fax to the specified printer – send a fax to a printer to which you have been given access

Route fax to people or distribution list – forward a fax to other fax service users and groups of fax service users)

Move a copy to the specified client subfolder – save a fax in a folder created under a pre-existing FAXCOM Client folder

Delete fax -- discontinue any further routing of a fax and remove it

Make this the final rule evaluated – if condition(s) are met for the rule, specify that no further rule evaluation take place

The additional actions to which users can be granted access fall into the following categories, and you grant access to these on a category-by-category basis:

OCR actions

Barcode actions

LDAP actions

ODBC actions

Fax splitting actions

Anyone with access to *all* Advanced Fax Routing actions should be aware of the following basic concepts for creating rules to route received faxes:

- Typically, the first rules you might create are those whose actions extract information about/from the fax, in order to create variables to be used in subsequent actions. The actions that extract information are:

Extract Barcode and Create Variable

Extract Text and Create Variable

Extract Text Listed in Text File and Create Variable

For example, you might want to search received insurance claims forms and extract the initials of a specific claims representative

- Next, you might choose the **Reformat** function to modify the extracted data to be in the exact format in which it is stored in your LDAP directory.
- You might then typically perform **Look Up** actions, to compare the extracted data with the information retrieved in the Look Up. For example, having reformatted the extracted representative's initials, you could do an LDAP look up to find the Fully Qualified Domain Name (FQDN) name of him/her. The **Look Up** actions are:

Look up in LDAP and Create Variable

Look up in ODBC and Create Variable

Look up in Text File Table and Create Variable

- Based on the information extracted from the fax, which was then reformatted and looked up in LDAP, you might then create multiple **delivery** actions. For example, having extracted the claim representative's initials, reformatted them to be in the exact format in which user information is stored in LDAP, done an LDAP look up to match the extracted/reformatted data with the appropriate claims representative, you could then automatically forward the fax to the representative, rename the fax with a string made up of the name of the representative, print it to a specific printer, email it to a claims representative supervisor, etc. **Delivery** actions are:

Add Note to Document

Delete Fax

E-mail

Print

Rename Document

Route to Other Users

Save in Network Folder

Save in Sub-Folder

Split into Separate Documents

Write ODBC

- When creating many actions, the **Add *Keyword...*** button is displayed, enabling you to select data information from the following categories: *Received Fax Properties, User Properties, Current Time and Date, Fax Note, and User Created Variable*. Be aware that while all items in all categories are displayed, only some are relevant to the action you are specifying.

- The **Make this the final rule evaluated** action is used to specify that if condition(s) are met for the rule, no further rule evaluation takes place
- One FAXCOM Queue can support multiple workflows for processing received faxes, and the workflows can range from very basic to quite advanced, as described below:

Basic workflows include:

Deleting, or forwarding faxes to specified subfolders, when the TSI received with the fax is detected as a sender of spam.

Routing faxes to users based on text extracted from the cover page.

Automatically redirecting faxes when the recipient is flagged as Out of Office.

Intermediate workflows include:

Converting a received fax to a text data file.

Delivering the data file to an application for automatic processing

Advanced workflows include:

Separating a multi-page document into multiple documents.

Searching a network resource for the owner of each document based on extracted transaction IDs.

Delivering each document to the correct owner with an attached .xml file that enables the document to be automatically indexed from the fax image included in the .xml file.

- When you select a previously-created rule from the list of rules in the main Advanced Fax Routing window, you can then click a button to **Remove** the rule, **Edit** the rule, or move it **Up/Down** within the list to change the order in which it is executed.

Advanced Fax Routing Terminology

The following terms are used in Advanced Fax Routing:

Action – task to be executed if the conditions of a rule are matched by the received fax.

Caller ID – telephone number of the fax sender.

Condition – defines the relationship that must exist between a variable and a defined value or range of values in order for the action list of a rule to be executed.

Diagnostic Logging – a logging mode you can turn on when actions are not being executed as intended. The log file created in the home directory displays the routing stages taken by a received fax, enabling you to locate the source of the unintended action. Diagnostic logging should not be enabled by default, but only when necessary to uncover the source of any problems.

DID – an acronym for Direct-Inward-Dial service offered by telephone companies that assigns a unique fax number to every network user or network device (such as a printer), enabling fax senders to dial a typical phone number.

Error Code – Numerical error code value for any fax received in an error condition.

Fax Note – one of a number of abbreviated comments that may be attached to a fax once it is received

Fax Port – specific port on a FAXCOM Server where the fax was received.

Faxcom – the name of a FAXCOM Server on which the fax was received.

Keyword – a representation of an item of fax information data, i.e., fax properties and values of user-created variables. For example, the Keyword for the *Time Received* property is *%miTime%*, the Keyword for the *Out-of-Office* property is *%siOut%*.

Multi valued Variable – a variable that can have multiple values **at the same time**, as for example, when the *To:* field has different values on the same fax page, i.e., Gus, Carlos, John.

Out-of-Office – a flag indicating the fax recipient is not in the office.

Property – values associated with the received fax.

Received Fax Properties – consists of the following pieces of information received with the fax (where only those in bolded text can be used as Advanced Fax Routing criteria): **Caller ID, Connection Time, Date Received, DID, Error Code, Fax Port, Faxcom, Pages Received, Time Received, TSI, Queue JobID, Unique ID, Connection Time Minutes, Connection Time Seconds, Faxcom Server Number, Split Index, File Name.**

Relation – values used in the evaluation of conditions, such as equals, does not equal, includes, does not include, is within range of.

Rule – consists of a list of conditions (criteria) and a list of actions to be performed on the received fax if all conditions are met.

TSI – the Transmitting Station Identifier of the sender, typically an identifier such as the name of the company

User Created Variable – a placeholder created by the user for storing fax information data

User Properties – consists of the following pieces of fax recipient information, (where only those in **bolded** text can be used as Advanced Fax Routing criteria): **User ID**, User's Friendly Name, User's Account Number, User's Home Directory, **Out-of-Office**.

User ID – either of the following:

- Full Name of the user as entered into the FAXCOM Queue User List, i.e., John Doe
- An email user's email address, i.e.,
John@biscom.com <mailto:John@biscom.com>
- A typeless LDAP *user ID*, i.e.,

George Bartley/SubDept1/SUBDOMAIN.GUSADDOMAIN.biscom.com

Value – when creating a variable, i.e., a placeholder for storing fax information data, the value assigned to the variable

Variable – a placeholder that holds the data assigned to the placeholder

Access the Advanced Fax Routing Utility

You can access the Advanced Fax Routing utility (Figure 1) from the following MMC locations:

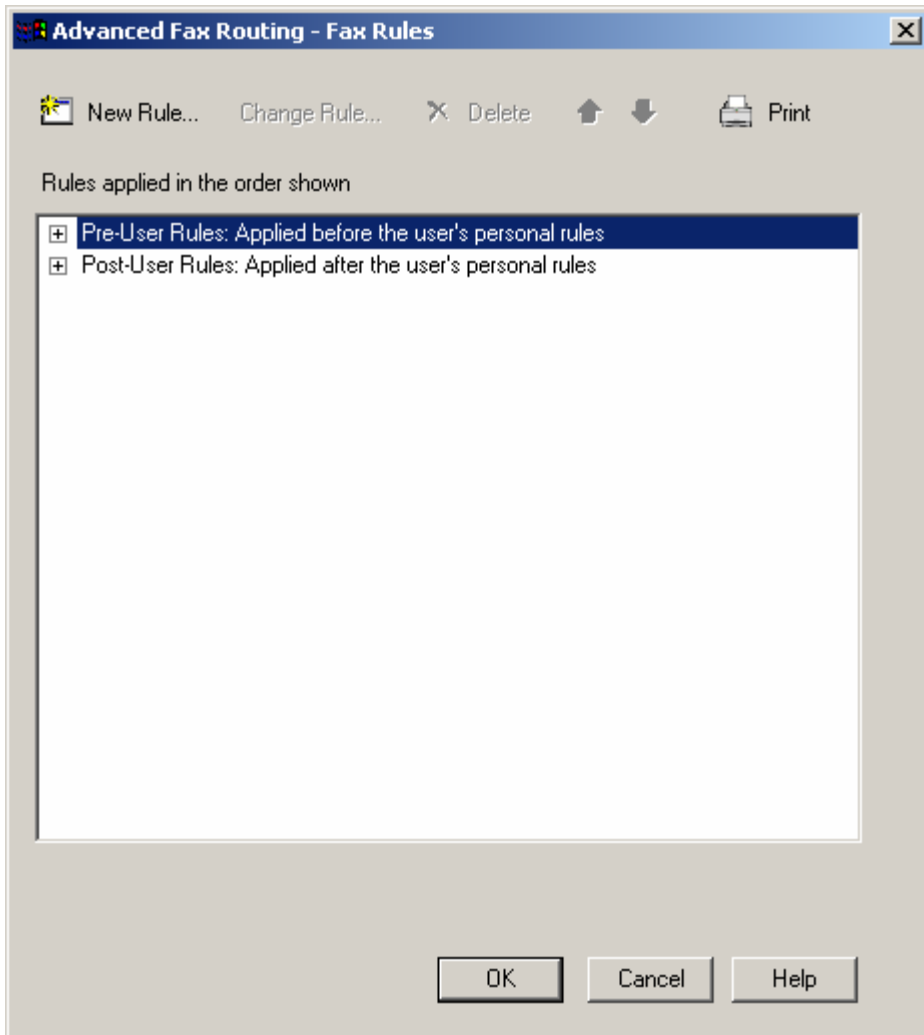


Figure 1. Advanced Fax Routing Main Window

- By clicking the **Adv. Fax Routing** button on the Change a Selected Item dialog (Figure 2), accessible by selecting a FAXCOM Queue to be configured in the right pane, right-clicking and selecting *Routes and User List*, to display the User List, then selecting a FAXCOM Client user and clicking the **Change** button.

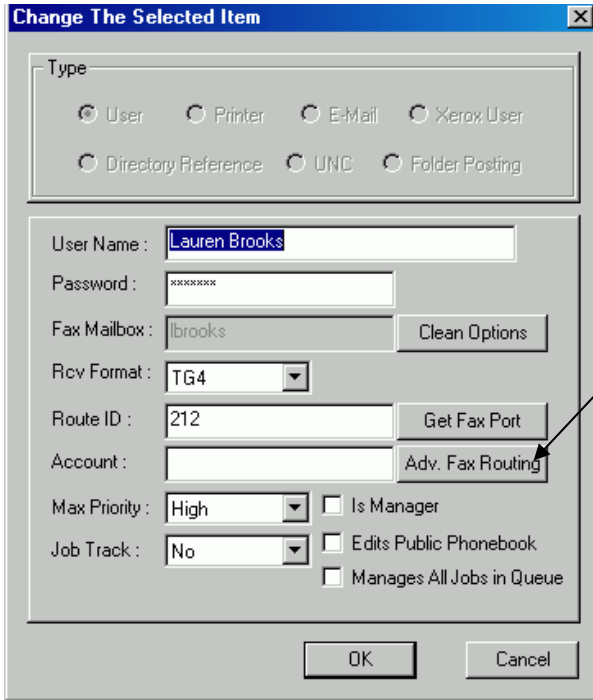


Figure 2. Change the Selected Item Dialog

- Clicking the **Edit Policy Applied Rules** button on the FAXCOM User Policies Advanced Fax Routing tab (Figure 3), accessible by:
 - Selecting a previously-created SMTP Gateway in the right pane, right-clicking, selecting *Properties...FAXCOM Queues* tab, and clicking the **New Policy** button for a selected FAXCOM Queue.
 - Selecting a previously-created FAXCOM Queue in the right pane, right-clicking, selecting *LDAP Integration and Policies*, and either clicking the **Add** button to add a new policy or clicking the **Edit** button to modify a previously-specified policy.

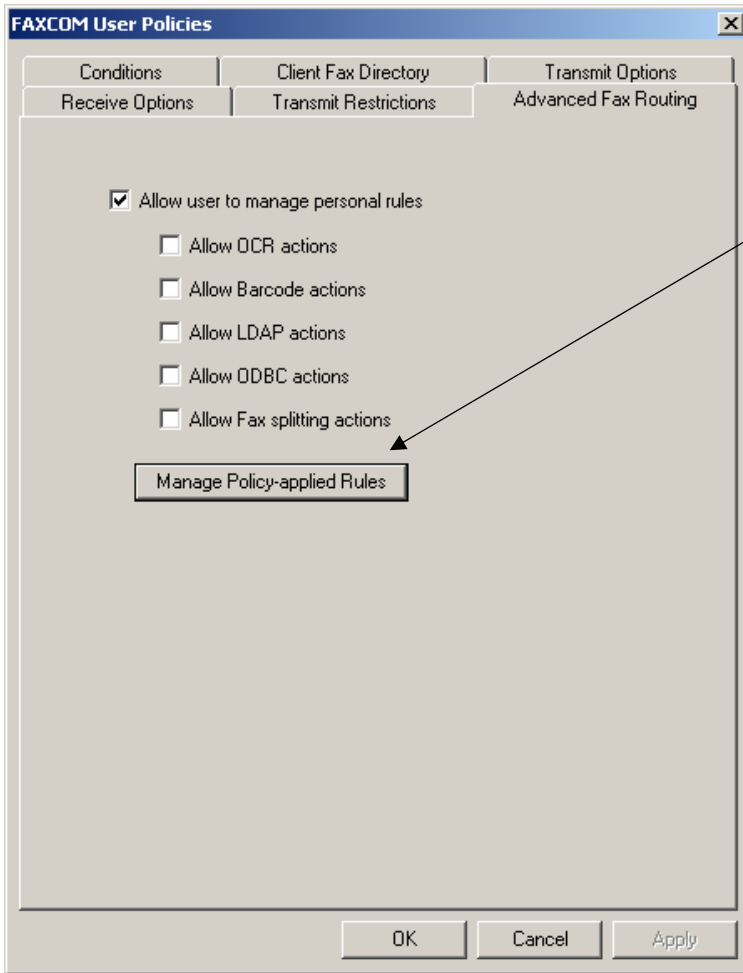


Figure 3. FAXCOM User Policies Advanced Fax Routing Tab

Add Rules

An Advanced Fax Routing Rule consists of a list of conditions (criteria) and a list of actions to be performed on the received fax if all conditions are met. When adding a rule, you give it a descriptive name on the Rule dialog (Figure 4), specify whether it applies to every received fax or only those that meet the specified conditions, and click **OK**.

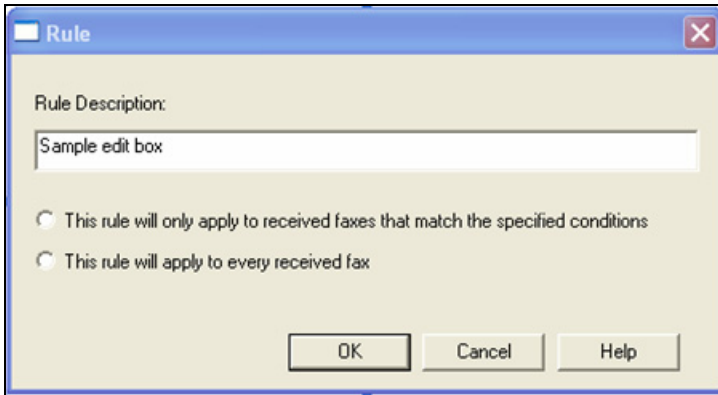


Figure 4. Rule Dialog

When you, as the fax service administrator, add rules (as opposed to an individual user), you can add the rule as a Pre-User rule, to be applied before any user-created personal rules or as a Post-User rule, to be applied after any user-created personal rules. In addition, you can manage (i.e., edit/delete) any user-created personal rules.

Once you have added the rule, you add the action(s) to execute and the conditions (if applicable).

Specify Conditions

Once you have given the Rule a description on the Rule dialog (Figure 4), selected the option whereby the rule applies only to those faxes that meet the specified conditions, and either clicked the **Add Condition** button for that rule, or double-clicked the [<double-click here to add a condition to be met>](#) link, do the following to specify the conditions whereby the rule is applied on the Conditions dialog (Figure 5):

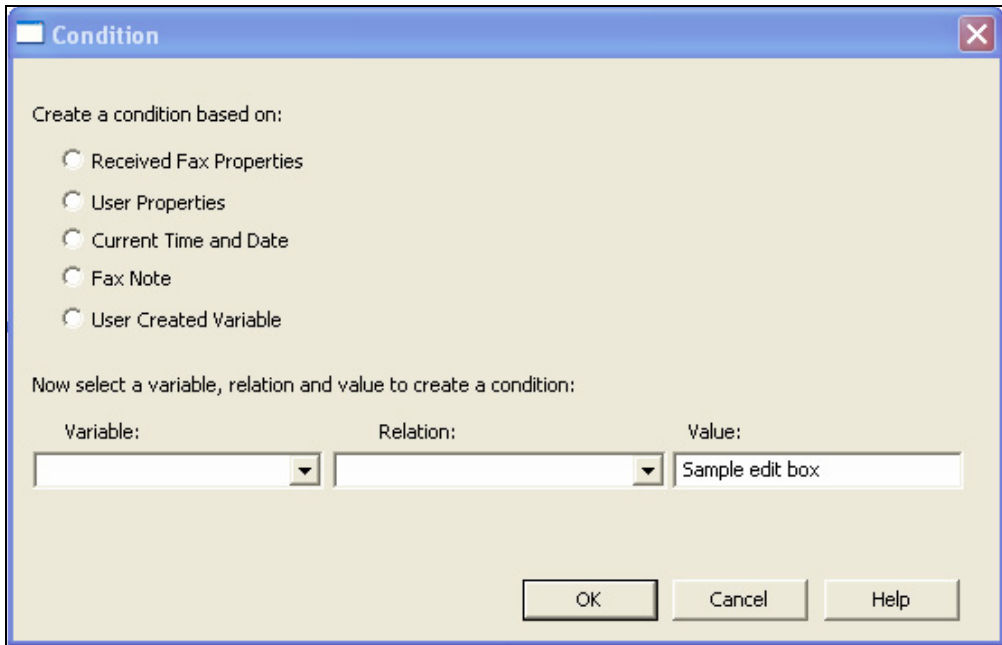
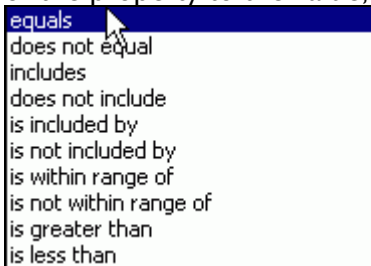


Figure 5. Conditions Dialog

Select the appropriate fax information data category (*Received Fax Properties, User Properties, Current Time and Date, Fax Note, User Created Variable*) to display the properties available for that category. Select the specific property, then the relation of the property to the value, where the relation can be one of the following



. Then specify the appropriate value and click **OK**, where:.

Received Fax Properties – Consists of the following pieces of information received with the fax (where only those in bolded text can be used as Advanced Fax Routing criteria): **Caller ID, Connection Time, Date Received, DID, Error Code, Fax Port, Faxcom, Pages Received, Time Received, TSI**, Queue JobID, Unique ID, Connection Time Minutes, Connection Time Seconds, Faxcom Server Number, Split Index, File Name.

User Properties – Consists of the following pieces of fax recipient information, (where only those in **bolded** text can be used as Advanced Fax Routing criteria):

User ID, User's Friendly Name, User's Account Number, User's Home Directory, **Out-of-Office**.

Current Time and Date – consists of the following pieces of information received with the fax: Current Date, Current Time, Day of Week.

Fax Note – consists of any previously-specified notes to be added to a received fax.

User Created Variable – consists of any previously-created variables (i.e., data placeholders).

Select an Action

Once you have specified a Rule Description on the Rule dialog (Figure 4), chosen whether the rule applies to all received faxes or only those that meet the specified conditions, and either clicked the **Add Action** button or double-clicked the [<double-click here to add an action>](#) link for the selected rule, select the appropriate action from the drop-down list on the Choose an Action dialog (Figure 6) and click **OK**.

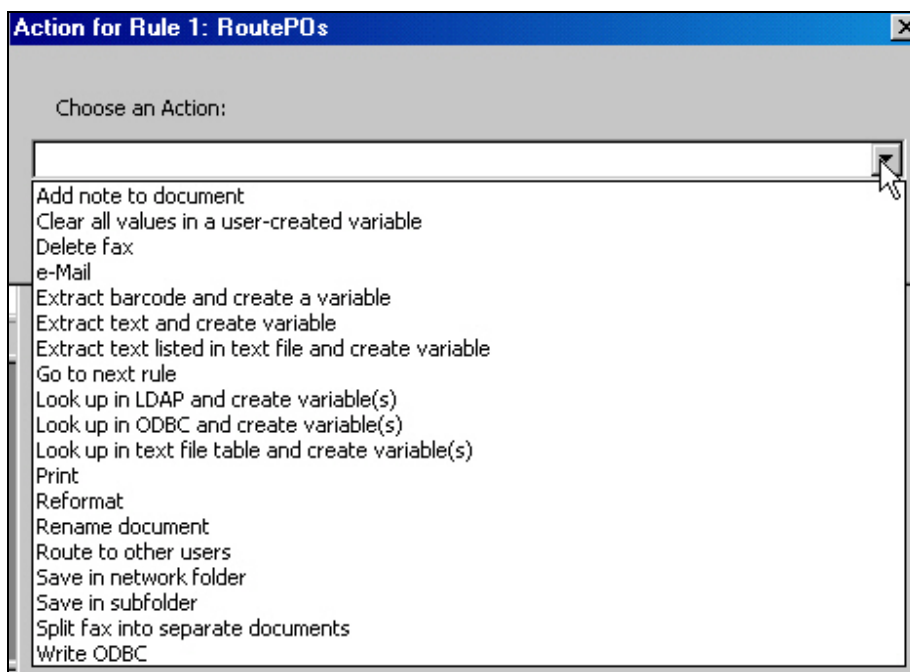


Figure 6. Choose an Action Dialog

Note: *Be aware that you can add an action by clicking on any line in the expanded rule.*

Refer to the “Welcome” section earlier in this chapter for a brief description of the available actions.

Select Keywords

A Keyword is a representation of an item of fax information data, i.e., fax properties and values of user-created variables. For example, the Keyword for the *Time Received* property is *%miTime%*, the Keyword for the Out-of-Office property is *%siOut%*.

When configuring any of the following actions, the **Add Keyword...** button is displayed (and becomes enabled when your cursor is in the appropriate field), so that you can display the Select a Keyword dialog (Figure 7) and select Keywords representing fax information data for use in that field:

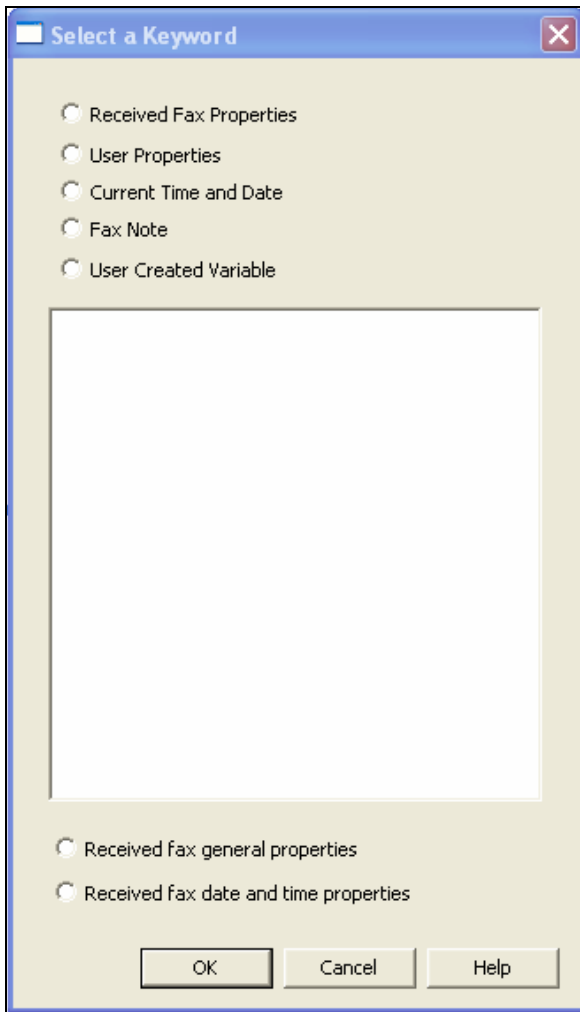


Figure 7. Select a Keyword Dialog

- Add note
- e-Mail
- Extract text and create variable
- Look up in LDAP and create variable(s)
- Look up in ODBC and create variable(s)
- Look up in text file table and create variable(s)
- Reformat
- Rename document
- Route to other users
- Save in network folder
- Save in sub-folder
- Write ODBC

For example, when renaming a document, you can select a Keyword as part (or all) of the *New Name*. When adding a note to a document, you can select a Keyword as part (or all) of the *Fax Note Text*.

Once you have clicked the **Add Keyword...** button, select the appropriate fax information data category (*Received Fax Properties, User Properties, Current Time and Date, Fax Note, User Created Variable*) to display the Keywords available for that category and click **OK**. Be aware that while all items in all categories are displayed, only some are relevant to the action you are specifying.

Rules that Extract Information from the Fax Image

Extract Barcode and Create Variable

Do the following to configure the **Extract Barcode and Create Variable** action on the Extract Barcode and Create Variable dialog (Figure 8), and then click **OK**.

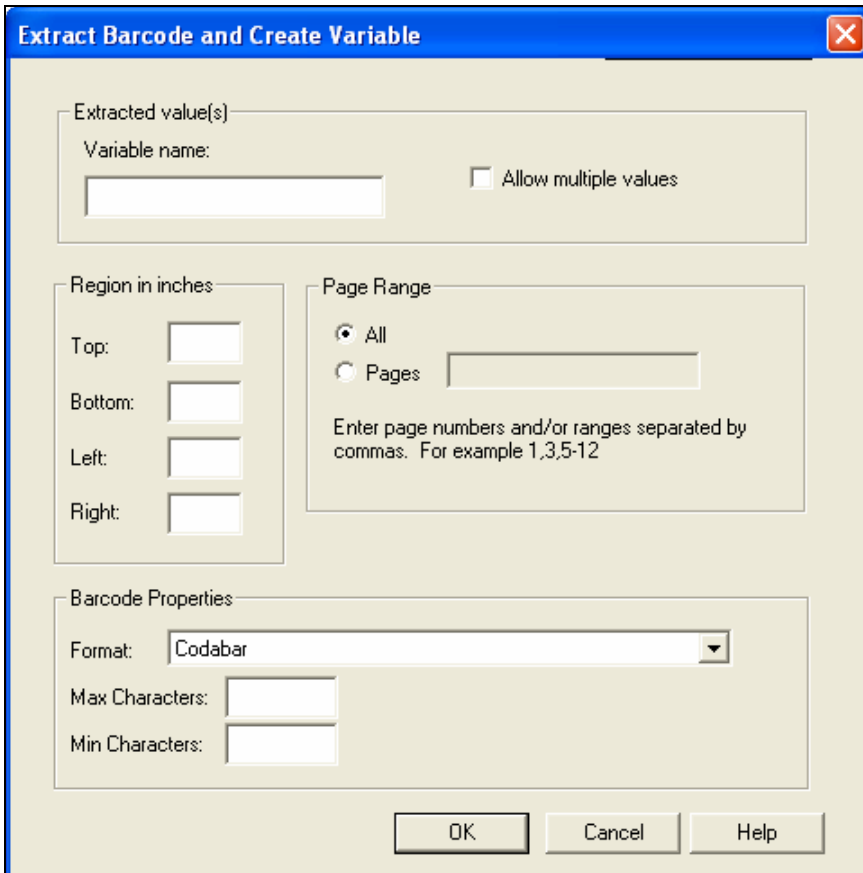


Figure 8. Extract Barcode and Create Variable Dialog

Variable name – specify a descriptive name for the variable you are creating from the extracted data.

Allow multiple values – check this box to specify the variable can have more than one value **on the same page**. It is not necessary to check this box when the variable varies from page to page.

Region in inches – use the *Top/Bottom/Left/Right* settings to specify the boundaries of the area to be searched.

Page Range – specify whether to search all pages or specified pages only.

Format – select the barcode format in use.

Max Characters – specify the maximum number of characters to be extracted, where leaving the box blank specifies there is no maximum.

Min Characters – specify the minimum characters to be extracted, where leaving the box blank is equal to specifying one character.

Extract Text and Create Variable

Do the following to configure the **Extract Text and Create Variable** action on the Extract Text and Create Variable dialog (Figure 9), and then click **OK**.

The dialog box is titled "Extract Text and Create Variable". It features a blue title bar with a close button. The main area is light beige and contains several sections:

- Variable name:** A text input field followed by a checkbox labeled "Allow multiple values".
- Region in inches:** Four text input fields for "Top:", "Bottom:", "Left:", and "Right:".
- Page Range:** Two radio buttons, "All" (selected) and "Pages". The "Pages" option is followed by a text input field. Below this is a note: "Enter page numbers and/or ranges separated by commas. For example 1,3,5-12".
- Where to Begin:** Five radio buttons: "Immediately" (selected), "After this exact text string", "When reaching a character not in this list", "When reaching one of these characters", and "After [text box] (number of) characters". To the right is a "Character List" text input field.
- Where to End:** Four radio buttons: "When max characters are reached" (selected), "When reaching this exact text string", "When reaching a character not in this list", and "When reaching a character in this list". To the right is a "Character List" text input field. Below these is a checkbox labeled "Also when reaching the end of line".
- Include formatted text:** A checkbox.
- Max Characters:** A text input field.
- Min Characters:** A text input field.
- Multiple values delimited by:** A text input field.
- Buttons:** "Add Keyword ..." (disabled), "Advanced..." (disabled), "OK", "Cancel", and "Help".

Figure 9. Extract Text and Create Variable Dialog

Variable name – specify a descriptive name for the variable you are creating from the extracted data.

Allow multiple values – check this box to specify the variable can have more than one value on the same page. It is not necessary to check this box when the variable varies from page to page.

Region in inches – use the *Top/Bottom/Left/Right* settings to specify the boundaries of the area to be searched.

Page Range – specify whether to search all pages or specified pages only.

Where to Begin – select the appropriate radio button to define the beginning of the extraction, where *After this exact text string*, *When reaching a character not in this list*, and *When reaching one of these characters* enables the *Character List* field, in which to specify the appropriate characters. For example, selecting *When reaching a character not in this list* and then specifying numbers 1 through 10, directs the extraction to skip all numbers. When selecting the *After (number of) characters*, specify the appropriate number of characters.

Character List – enter the appropriate characters in this box, which is enabled when you select either *After this exact text string*, *When reaching a character not in this list*, or *When reaching one of these characters*. You can also click the *Add Keyword...* button when your cursor is in a *Character List* field to be able to select keywords as all or part of the list.

Where to End – select the appropriate radio button to define the end of the extraction, where *When reaching this exact text string*, *When reaching a character not in this list*, and *When reaching one of these characters* enables the *Character List* box, in which to specify the appropriate characters. For example, selecting *When reaching a character one of these characters* and then specifying numbers 1 through 10, directs the extraction to end when it encounters a number.

In addition to selecting a *Where to End* radio button to specify where the extraction ends, you can check the *Also when reaching the end of the line* checkbox.

Character List – enter the appropriate characters in this box, which is enabled when you select either *When reaching this exact text string*, *When reaching a character not in this list*, and *When reaching one of these characters*. You can also click the *Add Keyword...* button when your cursor is in a *Character List* field to be able to select keywords as all or part of the list.

Include formatted text – select this checkbox to specify that formatted text, i.e., tabs and spaces, be included.

Max Characters – specify the maximum number of characters to be extracted, where leaving the field blank specifies there is no maximum.

Min Characters – specify the minimum characters to be extracted, where leaving the field blank is equal to specifying one character.

Multiple values delimited by – when you select the *Allow multiple values* checkbox, the *Multiple values delimited* field is enabled, in which to enter the delimiter used between values (such as a comma, semicolon, etc.).

Advanced – click this button to access the *Advanced OCR Settings* dialog, where you can specify additional information for the OCR engine (as described in the immediately following section).

Add Keyword... – click this button when your cursor is in the *Character List* fields, to be able to select keywords as all or part of the list.

A Keyword represents an item of fax information data, i.e., fax properties and values of user-created variables. For example, the Keyword for the Time Received *property* is *%miTime%*.

After clicking the **Add Keyword...** button, select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a keyword/variable item that will be replaced with the actual instance of the item. The selected item is displayed in the *Character List* field.

If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s). You can also type characters directly into the *Character List* fields, to be used in combination with any selected keywords.

Specify Advanced OCR Settings

Since no OCR engine is 100% accurate when identifying characters, use this dialog (Figure 10) to specify additional information to be used by the OCR engine when extracting text, clicking **OK** when done.

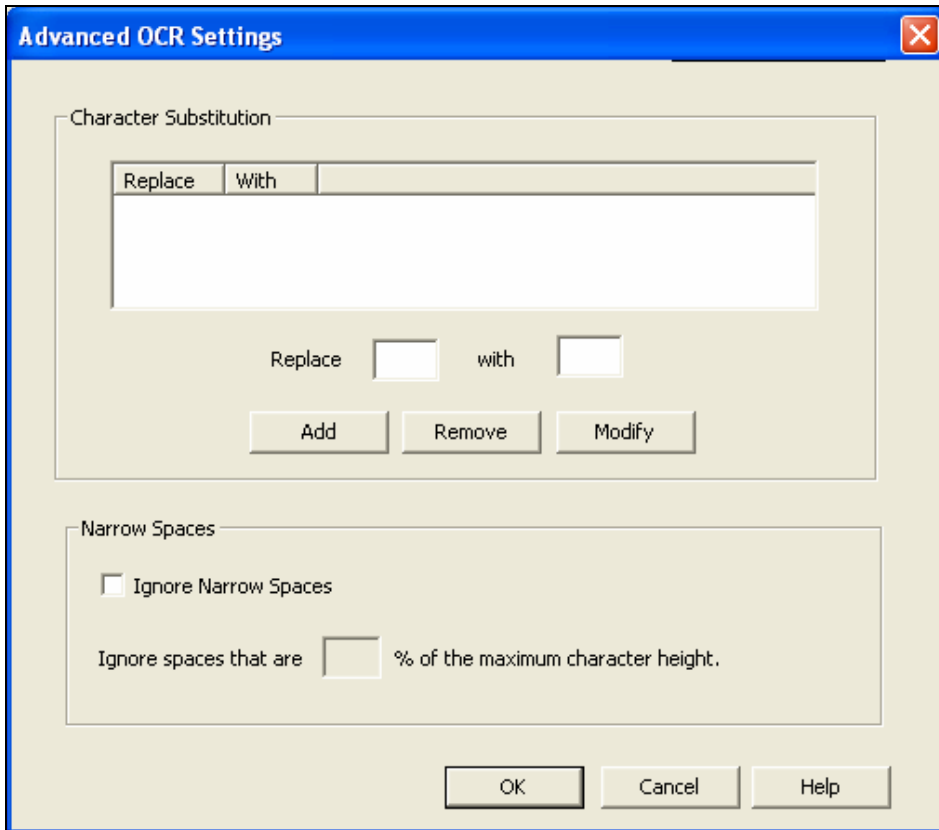


Figure 10. Advanced OCR Settings

Character Substitution – in the *Replace* field, specify a character typically incorrectly recognized by the OCR engine and in the *with* field, specify the character with which it will be replaced, and then click **Add** to add the pair to the list. For example, if you are looking for numeric characters only, you might specify that the *l* character be replaced with a *1*.

To delete a character substitution pair from the list, select it and click the **Remove** button.

Ignore Narrow Spaces – since different characters occupy different amounts of space, and since spacing itself can vary within a document, use this checkbox to fine tune how the OCR engine handles spaces.

Check the box to specify that the OCR engine ignore spaces that are less narrow than the maximum character length. The **ignore spaces that are % of the maximum character length** box is then enabled for you.

Ignore spaces that are % of the maximum character length – *If you selected the Ignore Narrow Spaces check box*, use this box to specify the percentage smaller than the maximum character height the space must be to be ignored.

Extract Text Listed in Text File and Create Variable

Once you have selected the **Extract Text Listed in Text File and Create Variable** action, do the following to configure the action on the Extract Text Listed in Text File and Create Variable dialog (Figure 11), clicking **OK** when done:

Extracted value(s)

Variable name: Allow multiple values

Region in inches

Top:

Bottom:

Left:

Right:

Page Range

All

Pages

Enter page numbers and/or ranges separated by commas. For example 1,3,5-12

Match whole words only

Case Sensitive

Advanced...

Text File: Browse

OK Cancel Help

Figure 11. Extract Text Listed in Text File and Create Variable

Variable name – specify a descriptive name for the variable you are creating from the extracted data.

Allow multiple values – check this box to specify the variable can have more than one value **on the same page**. It is not necessary to check this box when the variable varies from page to page.

Region in inches – use the *Top/ Bottom/ Left/ Right* settings to specify the boundaries of the area to be searched.

Page Range – specify whether to search all pages or specified pages only.

Match whole words only – select (check) this checkbox to specify a match with occurrences that are whole words, not part of a larger word.

Case Sensitive – select (check) this checkbox to specify that the action distinguishes between uppercase and lowercase characters, so that only exact capitalization matches are extracted.

Advanced – click this button to access the Advanced OCR Settings dialog (Figure 11-10), where you can specify additional information for the OCR engine – as explained in the immediately preceding section.

Text File – either specify the path of the text file, or click the **Browse** button to select it, being aware that the path *must* be one accessible to the FAXCOM Queue.

Browse – click this button to browse your file system for the text file.

Rules that Extract Information from Network Resources

Reformat Variable

You typically use the **Reformat Variable** action to do the following:

- Reformat the contents of a variable and place the result in a new variable
- Specify the format in which documents will be automatically renamed
- Specify the format in which notes will automatically be added to documents

Once you have selected the **Reformat Variable** action, specify the following information for reformatting fax data on the Reformat Variable dialog (Figure 12) – either Fax Properties or previously-created User-created Variables, clicking **OK** when done:

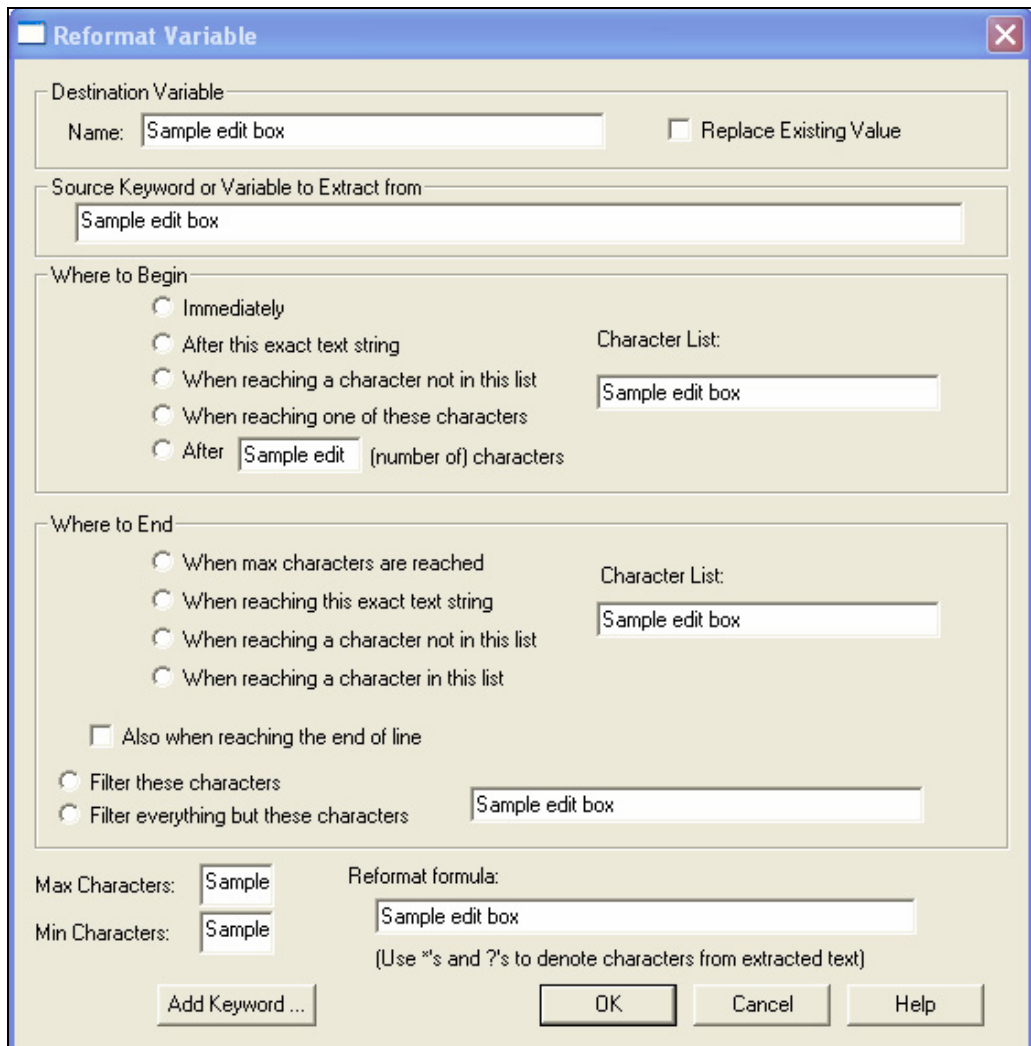


Figure 12. Reformat Variable Dialog

Destination Variable name – specify a descriptive name for the reformatted fax data.

Replace Existing Value – select (check) this checkbox to specify that the source value be cleared before any extracting takes place, as opposed to having the new values appended to the existing value.

Source Keyword/Variable to extract from – type directly into the field the variable to be extracted from, and/or click the **Add Keyword...** button to be able to select keywords as all or part of the string.

A Keyword represents an item of fax information data, i.e., fax properties and values of user-created variables. For example, the Keyword for the Time Received *property* is *%miTime%*.

After clicking the **Add Keyword...** button, select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a keyword/variable item that will be replaced with the actual instance of the item. The selected item is displayed in the *Character List* field. If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s). You can also type characters directly into the *Character List* fields, to be used in combination with any selected keywords.

Where to Begin – select the appropriate radio button to define the beginning of the extraction, where *After this exact text string*, *When reaching a character not in this list*, and *When reaching one of these characters* enables the *Character List* field, in which to specify the appropriate characters. For example, selecting *When reaching a character not in this list* and then specifying numbers 1 through 10 directs the extraction to skip all numbers. When selecting the *After (number of) characters*, specify the appropriate number of characters.

Character List – enter the appropriate characters in this box, which is enabled when you select either *After this exact text string*, *When reaching a character not in this list*, or *When reaching one of these characters*. You can also click the **Add Keyword...** button when your cursor is in a *Character List* field to be able to select keywords as all or part of the list.

Where to End – select the appropriate radio button to define the end of the extraction, where *When reaching this exact text string*, *When reaching a character not in this list*, and *When reaching one of these characters* enables the *Character List* field, in which to specify the appropriate characters. For example, selecting *When reaching a character one of these characters* and then specifying numbers 1 through 10, directs the extraction to end when it encounters a number.

In addition to selecting a **Where to End** radio button to specify where the extraction ends, you can check the **Also when reaching the end of the line** checkbox.

Character List – enter the appropriate characters in this box, which is enabled when you select either *When reaching this exact text string*, *When reaching a character not in this list*, and *When reaching a character in this list*. You can also click the **Add Keyword...** button when your cursor is in a *Character List* field to be able to select keywords as all or part of the list.

Filter these characters – select this radio button to specify any characters to skip, and/or click the **Add Keyword...** button to be able to select keywords as all or part of the string.

A Keyword represents an item of fax information data, i.e., fax properties and values of user-created variables. For example, the Keyword for the Time Received property is *%miTime%*.

After clicking the **Add Keyword...** button, select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a keyword/variable item that will be replaced with the actual instance of the item. The selected item is displayed in the *Filter these characters* field. If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s). You can also type characters directly into the *Filter these characters* field, to be used in combination with any selected keywords.

Filter everything but these characters – select this radio button to specify that all characters other than those you specify be skipped, and/or click the **Add Keyword...** button to be able to select keywords as all or part of the string.

A Keyword represents an item of fax information data, i.e., fax properties and values of user-created variables. For example, the Keyword for the Time Received property is *%miTime%*.

After clicking the **Add Keyword...** button, select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a keyword/variable item that will be replaced with the actual instance of the item. The selected item is displayed in the *Filter everything but these characters* field. If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s). You can also type characters directly into the *Filter everything but these characters* field, to be used in combination with any selected keywords.

Max Characters – specify the maximum number of characters to be extracted, where leaving the box blank specifies there is no maximum.

Min Characters – specify the minimum characters to be extracted, where leaving the box blank is equal to specifying one character.

Reformat formula – specify the formula for reformatting, using the ? wildcard character to denote any single character, and the * wildcard character to denote

any string of characters. For example, a possible reformat formula for an unformatted telephone number string might be: (???) ???-????.

Add Keyword... – click this button when your cursor is in any of the following fields, to be able to select keywords as all or part of the list:

Source Keyword or Variable to Extract from

Where to Begin Character List

Where to End Character List

Filter these characters

Filter everything but these characters

Reformat formula

A Keyword represents an item of fax information data, i.e., fax properties and values of user-created variables. For example, the Keyword for the Time Received property is *%miTime%*.

After clicking the **Add Keyword...** button, select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a keyword/variable item that will be replaced with the actual instance of the item. The selected item is displayed in the *Character List* field.

If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s). You can also type characters directly into the *Character List* fields, to be used in combination with any selected keywords.

Look up in LDAP and Create Variable(s)

Once you have selected the **Look up in LDAP and Create Variable(s)** action, specify the following to configure the action on the Look up in LDAP and Create Variable(s) dialog (Figure 13) and then click **OK**:

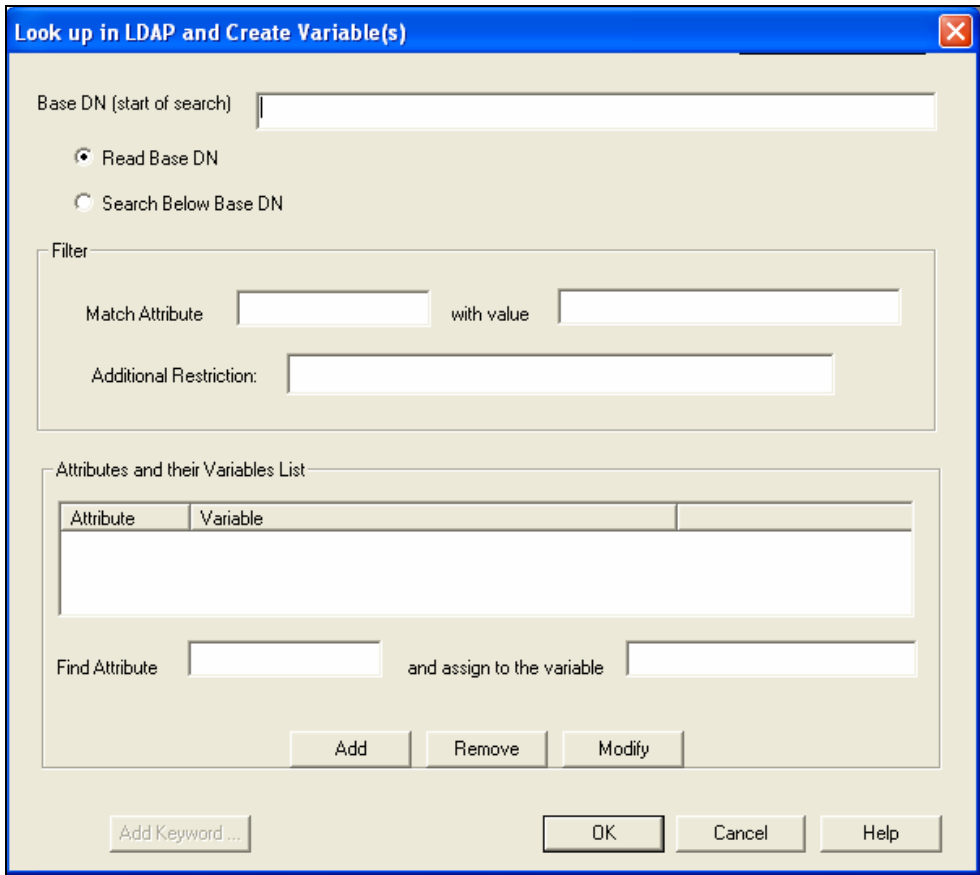


Figure 13. Look up in LDAP and Create Variable(s)

Base DN (start of search) – specify the Distinguished Name (DN) of the entry at which to start the search in LDAP.

Read Base DN – select this radio button to look for the specific entry in the *Base DN* field (rather than begin the search at this entry). Note that when you select this radio button, the fields in the *Filter* box *do not* apply.

Search Below Base DN – select this radio button to begin the search at the entry in the *Base DN* field (rather than look for the specific entry in the *Base DN* field). Note that when you select this radio button, the fields in the *Filter* box are active.

Match Attribute – specify the specific object attribute for which to search, as, for example, *facsimileTelephoneNumber*.

with value – specify the value of the specified attribute for which to search, as, for example, 212 for a *facsimileTelephoneNumber*.

Additional Restriction – specify any additional valid LDAP attribute to further limit the search. For example, when searching for a *facsimileTelephoneNumber* you might want to restrict the search to users only, not printers that also have a *facsimileTelephoneNumber*.

Find Attribute – once having located the appropriate item in LDAP, specify the attribute to extract for that item, as, for example, the *mail* attribute.

and assign to the variable – specify the value to assign to the extracted variable, which you can then use when creating other Advanced Fax Routing rules. Once you have specified the appropriate information in the *Find Attribute* as well as *and assign to the variable* fields, click the **Add** button to add the pair to the *Attributes and their Variables List*.

Add Keyword... – when your cursor is in the *with value* field, the **AddKeyword...** button is active, enabling you to populate the field with an appropriate Keyword.

A Keyword represents an item of fax information data, i.e., fax properties and values of user-created variables. For example, the Keyword for the Time Received property is *%miTime%*.

Select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a keyword/variable item that will be replaced with the actual instance of the item. For e.g., select *DID* to match the attribute in the *Match Attribute* field with a DID number. The selected item is displayed in the *with value* field. If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s).

Add – once you have specified the appropriate information in the *Find Attribute* as well as the *and assign to the variable* fields, click the **Add** button to add the entry to the *Attributes and their Variables List*.

Remove/Modify – after selecting an entry in the *Attributes and their Variables List*, click the appropriate button (**Remove/Modify**) to either remove or edit the entry.

Look up in ODBC and Create Variable(s)

Once you have selected the **Look up in ODBC and Create Variable(s)** action, do the following to configure the action on the Look up in ODBC and Create Variable(s) dialog (Figure 14), clicking **OK** when done:

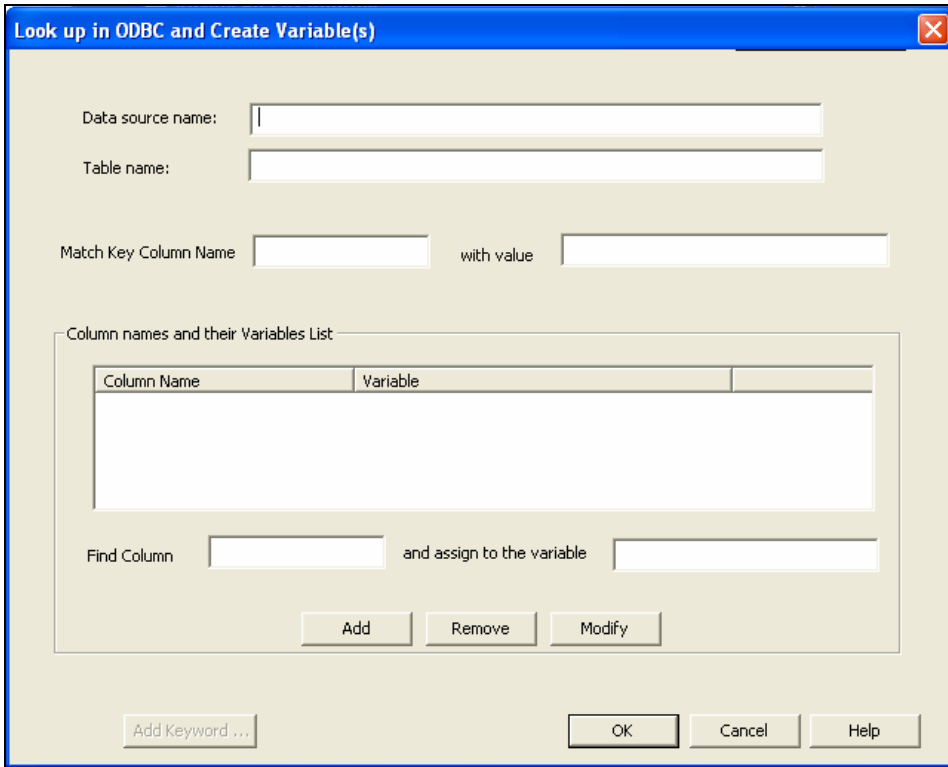


Figure 14. Look up in ODBC and Create Variable(s)

Data source name – specify the name of the data source that stores the information about how to connect to the data provider (SQL, MySQL, Oracle). The data source must be on the same machine where the FAXCOM Queue is running.

Table name – specify the name of the particular table in the database to search.

Match Key Column Name – specify the name of the key column used to sort the data.

with value – enter directly enter a constant as the value to match with the Key Column into the field, and/or click the **Add Keyword...** button to select a Keyword/Variable item that will be replaced with the actual instance of the item. If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s).

Find Column – specify the database field to find, specify the variable to assign to the field in the *and assign to the variable* field, and then click **Add** to add the pair to the *Column names and their Variables List*.

and assign to the variable – once you have specified the database field to find in the *Find Column* field, specify the variable to assign in this field, and then click **Add** to add the pair to the *Column names and their Variables List*.

Add – once you have specified the database field to find in the *Find Column* field, and specified the variable to assign in the *and assign to the variable* field, click **Add** to add the pair to the *Column names and their Variables List*.

Remove – to delete an entry in the *Column names and their Variables List*, select the entry and click the **Remove** button.

Add Keyword... – with your cursor in the *with value* field, click this button to select a Keyword/Variable item that will be replaced with the actual instance of the item as the value to match. If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s).

Look up in Text File Table and Create Variable(s)

Once you have selected the **Look up in Text File Table and Create Variable(s)** action, do the following to configure the action on the Look up in Text File Table and Create Variable(s) dialog (Figure 15), and then click **OK**.

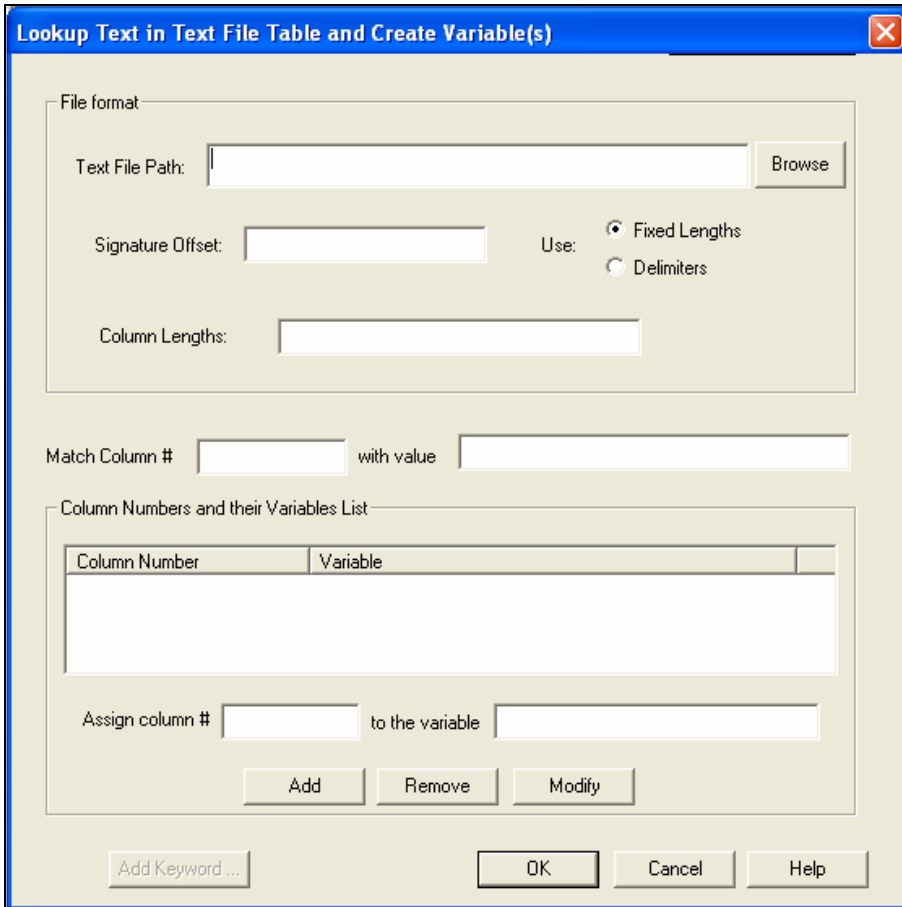


Figure 15. Look up in Text File Table and Create Variable(s)

Text File Path – either specify the path of the text file table, or click the **Browse** button to select it, being aware that the path *must* be one accessible to the FAXCOM Queue.

Signature Offset – specify any signature to be skipped before looking for the data to match, such as a version signature that precedes the data.

Use Fixed Lengths – select this radio button if the table is formatted according to fixed length columns. Then specify the appropriate column lengths in the *Column Lengths* field.

Use Delimiters – select this radio button if the table is formatted with delimiters, and then specify the delimiter used in the *Column Delimiters* field.

Column Lengths/Delimiters – if you selected the **UseFixed Lengths** radio button, specify the column lengths. If you specified **Use Delimiters**, specify the delimiter in use.

Match Column # -- specify the column number to match. Then in the *with* value field, specify the value to match to that column number. Note that when your cursor is in the *with value* field, the **AddKeyword...** button is active, enabling you to select Keywords representing fax information data as all or part of the value to match.

with value - specify the value to match to the column number. Note that when your cursor is in this field, the **AddKeyword...** button is active, enabling you to select Keywords representing fax information data as all or part of the value to match. A Keyword is a representation of an item of fax information data, i.e., fax properties and values of user-created variables.

Assign column # - specify the column number to which to assign the variable you will enter into the *to the variable* field. Once you have specified both entries, click the **Add** button to add the combination to the *Column Numbers and their Variables List*.

to the variable - specify the variable to be assigned to the column number entered into the *Assign column #* field and click the **Add** button. The combination specified is then listed in the *Column Numbers and their Variables List*.

Add - once you have specified information in both the *Match Column #* and *with value* fields, click this button to add the entries to the *Column Numbers and their Variables List*.

Remove - to delete an entry in the *Column Numbers and their Variables List*, select the entry in the list and click this button.

Add Keyword... - click this button when your cursor is in the *with value* field, to be able to select keywords as all or part of the value to match with the specified column number.

A Keyword represents an item of fax information data, i.e., fax properties and values of user-created variables. For example, the Keyword for the Time Received property is *%miTime%*.

After clicking the **Add Keyword...** button, select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a keyword/variable item that will be replaced with the actual instance of the item. For e.g., select *Current Date* to match with the current date. The selected item is displayed in the *with value* field. If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s).

You can also type a value directly into the *with value* field, to be used in combination with any selected keywords.

Clear all Values in a User-created Variable

If you determine that the values specified for a previously-created variable are no longer relevant, and/or you want to replace the values specified for the variable, you can use the **Clear all values in a user-created variable** action as follows:

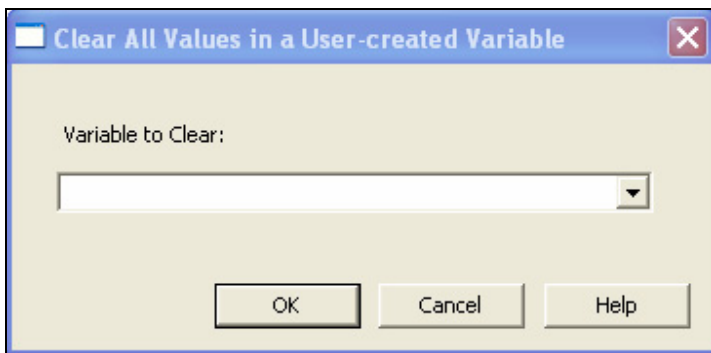


Figure 16. Clear All Values in a User-created Variable Dialog

- On the Clear All Values in a User-created Variable dialog (Figure 16), select the variable to clear from the list of previously-created variables and click **OK**. All values for that variable are now blank

Rules that Control How and Where a Fax is Delivered

Add Note to Document

Specify the following information for the note that is to be automatically added to a received fax on the Add Note to Document dialog (Figure 17), and then click **OK**.

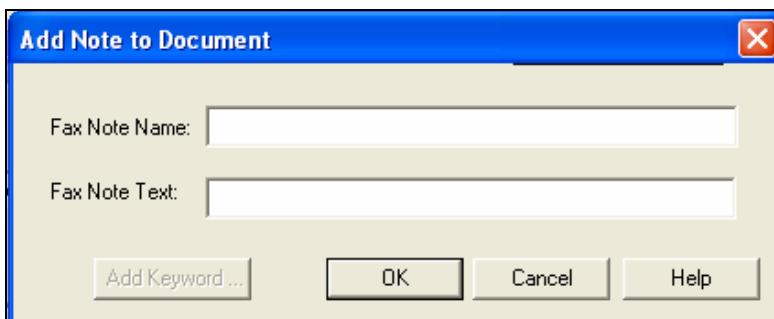


Figure 17. Add Note to Document Dialog

Fax Note Label – specify a descriptive name for the note.

Fax Note Text – specify the actual note text to be added. When your cursor is in this box, the **Add Keyword...** button is active, enabling you to select fax information properties and variables to include in the note -- in addition to the text you type directly into the *Fax Note Text* box.

Note that you can right-click in the *Fax Note Text* box to display a shortcut menu with the following choices: **Undo, Cut, Copy, Paste, Delete, Select All**, enabling you to manipulate the items in the string as appropriate.

Add Keyword... – when your cursor is in the *Fax Note Text* box, the **Add Keyword...** button is enabled.

A keyword represents an item of fax information data, i.e., fax properties and values of user-created variables. For example, the Keyword for the *Time Received* property is *%miTime%*.

After clicking the **Add Keyword...** button, select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties, User Properties, Current Time and Date, Fax Note, or User Created Variable*.

Then select a property/variable item that will be replaced with the actual instance of the item. For e.g., select *Current Date* to include the current date in the fax document note, i.e., December 2, 2005. The selected item is displayed in the *Fax Note Name* box. If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s). You can also type a character string directly into the string in the *New name* box that you want to be included in the new name. Click **OK**.

As an example, the following string is displayed in the *New name* box by clicking the **Add Keyword...** button and selecting *Current Date*, then typing the string *Sales Order* directly into the *New name* box, clicking the **Add Keyword...** button again and selecting *Current Time*, clicking the **Add Keyword...** button again and selecting *Faxcom* (for the name of the FAXCOM Server on which the document was received), and finally clicking the **Add Keyword...** button again and selecting *Pages Received*:

```
%siCurrDate%Sales Order%siCurrTime%%miwFaxcom%%miwPgs%
```

Notes can be added to an entire fax document only, not individual pages of a document.

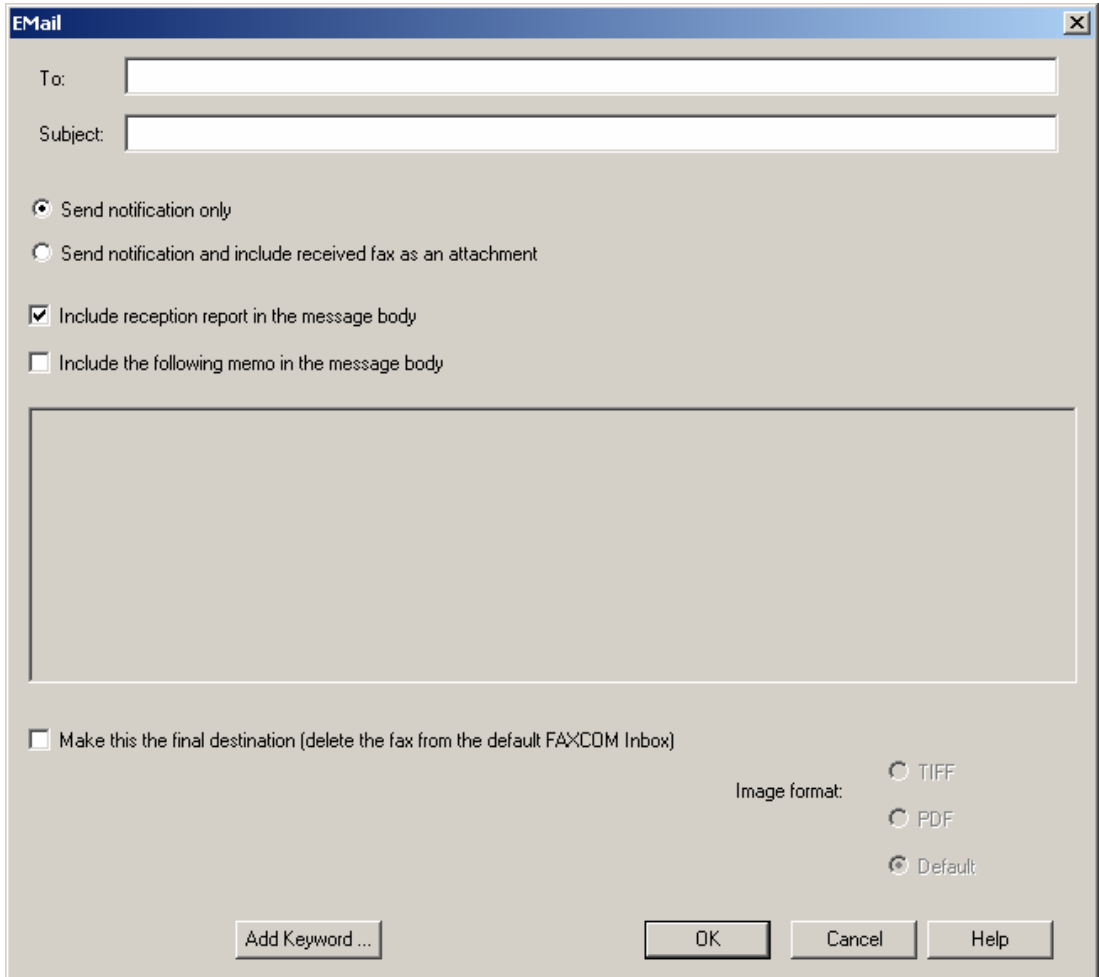
Faxes received to the FAXCOM Client will display the note text as part of the Received log fax entry. Faxes received to email will have the note text displayed as part of the email message (to which the actual fax is attached). Faxes received to a UNC location will have the note text displayed in the fax header file.

Delete Fax

Once you have selected the **Delete Fax** action, click **OK** to automatically delete the received faxes to which the action applies.

e-Mail

Specify the following information for automatically sending the fax to a valid email address on the EMail dialog (Figure 18), clicking **OK** when done:



The EMail dialog box contains the following elements:

- To:** Text input field
- Subject:** Text input field
- Send notification only
- Send notification and include received fax as an attachment
- Include reception report in the message body
- Include the following memo in the message body
- Make this the final destination (delete the fax from the default FAXCOM Inbox)
- Image format:**
 - TIFF
 - PDF
 - Default
- Buttons:** Add Keyword ..., OK, Cancel, Help

Figure 18. Email Dialog

To – specify a valid email address/distribution list.

Subject – specify the *Subject* to be displayed in the email Inbox.

Send notification only – send only an email message notifying the recipient that a fax was received in the default FAXCOM Client Inbox.

Send notification and include received fax as an attachment – send both the email message notification and the actual fax as a message attachment.

Include reception report in the message body – include fax reception details in the body of the email message notification, similar to the following:

```
-----Fax Reception Report-----  
Received Time: 11/02/2006 10:34  
Result: OK  
Description: All pages received OK  
Result Code: 0000  
Pages Received: 1  
Remote TSI: Biscum, Inc.  
Connect Time: 0 minutes, 0 seconds  
Routing ID: 2526  
Caller ID:  
Unique ID: BIS-FAXCOM_0611021534302713  
Fax Line: 24  
Fax Server: bis-faxcom  
  
The fax is included as a TIF image attachment
```

Include the following memo in the message body – select this option to enable an area in which to enter any text you want displayed as the email message notification.

Make this the final destination (delete the fax from the default FAXCOM inbox) – select this option to specify that once the fax is delivered to the email address, it is deleted and rule processing ends for the fax.

Note: *If you are sending only the message notification to the email address/distribution list, and not including the actual fax as an attachment, be careful about also selecting the Make this the final destination (delete the fax from the default FAXCOM Inbox) option.*

Image format – select the format in which to save the received fax, either *TIFF* (to be opened in a TIFF viewer), *PDF* (to be opened in Adobe Acrobat Reader), or *Default* (to use whichever format [*TIFF* or *PDF*] has been specified for this user account).

Add Keyword... – click this button when your cursor is in either the *To* or *Subject* fields to select keyword/variable items with which to populate the field.

Once you click the button, select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a keyword/variable item that will be replaced with the actual instance of the item.

Print

Once you have selected the **Print** action, specify the following information for automatically printing a received fax on the Print dialog (Figure 19), clicking **OK** when done:

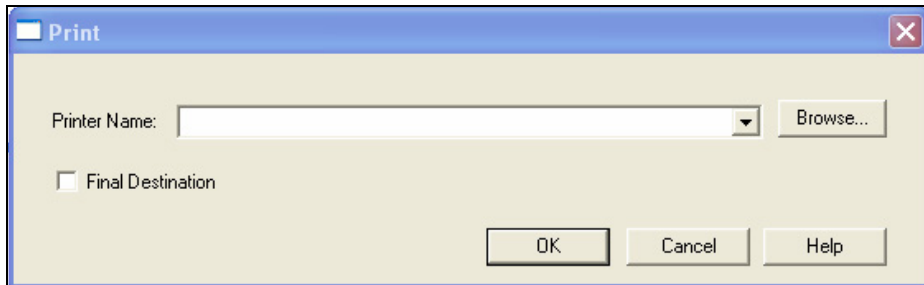


Figure 19. Print Dialog

Printer – either specify the name of the print share and print server yourself, or click the **Browse** button to open a window in which to select the printer.

Final Destination – check this box to specify that once the fax has been printed, it is deleted.

Rename Document

Once you have selected the **Rename Document** action, specify the following information for automatically renaming the fax document on the Rename Document dialog (Figure 20), clicking **OK** when done:

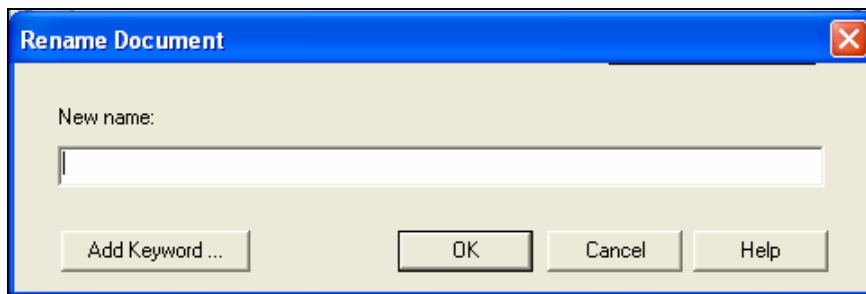


Figure 20. Rename Document Dialog

New name – type any character string to be the new name, either as the entire name, or as part of a string that includes Keywords you select by clicking the **Add Keyword...** button. Note that you can right-click in the *New name* field to display a shortcut menu with the following choices: **Undo**, **Cut**, **Copy**, **Paste**, **Delete**, **Select All**, enabling you to manipulate the items in the string as appropriate.

Add Keyword... – click this button when your cursor is in the *New name* field to select keyword/variable items with which to populate the field. Once you click the button, select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a keyword/variable item that will be replaced with the actual instance of the item. For e.g., select *Current Date* to name the fax document with the current date, i.e., December 2, 2005. The selected item is displayed in the *New name* box. If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s). You can also type a character string directly into the string in the *New name* field that you want to be included in the new name. Click **OK**.

As an example, the following string is displayed in the *New name* field by clicking the **Add Keyword...** button and selecting *Current Date*, then typing the string *Sales Order* directly into the *New name* box, clicking the **Add Keyword...** button again and selecting *Current Time*, clicking the **Add Keyword...** button again and selecting *Faxcom* (for the name of the FAXCOM Server on which the document was received), and finally clicking the **Add Keyword...** button again and selecting *Pages Received*:

```
%siCurrDate%Sales Order%siCurrTime%%miwFaxcom%%miwPg%
```

Click **OK** once the string in the *New name* field specifies the name you wish to assign.

Route to Other Users

Once you have selected the **Route to Other Users** action, specify the following information for automatically routing a received fax to another fax service user on the Route to Other Users dialog (Figure 21), clicking **OK** when done:

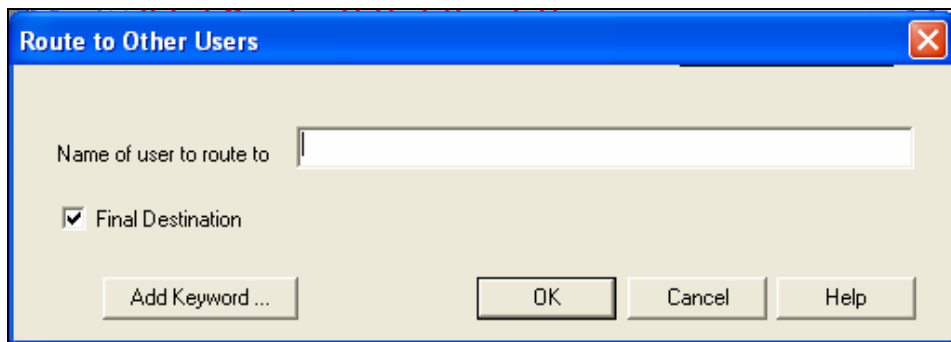


Figure 21. Route to Other Users Dialog

Name of user to route to – type the name of any user(s), either as the entire name, or as part of a string that includes Keywords you select by clicking the **Add Keyword...** button. Note that you can right-click in the *Name of user to route to* field to display a shortcut menu with the following choices: **Undo, Cut, Copy, Paste, Delete, Select All**, enabling you to manipulate the items in the string as appropriate.

Add Keyword... – with your cursor in the *Name of user to route to* field, click this button to select keyword/variable items with which to populate the field.

Select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties, User Properties, Current Time and Date, Fax Note, or User Created Variable*.

Then select a Keyword/Variable item that will be replaced with the actual instance of the item.

Final Destination – check this box to specify that once the fax has been routed to the other user, it is deleted.

Save in Network Folder

Once you have selected the **Save in Network Folder** action, specify the following information for automatically routing a received fax to a UNC location on the Save in Network Folder dialog (Figure 22), clicking **OK** when done:

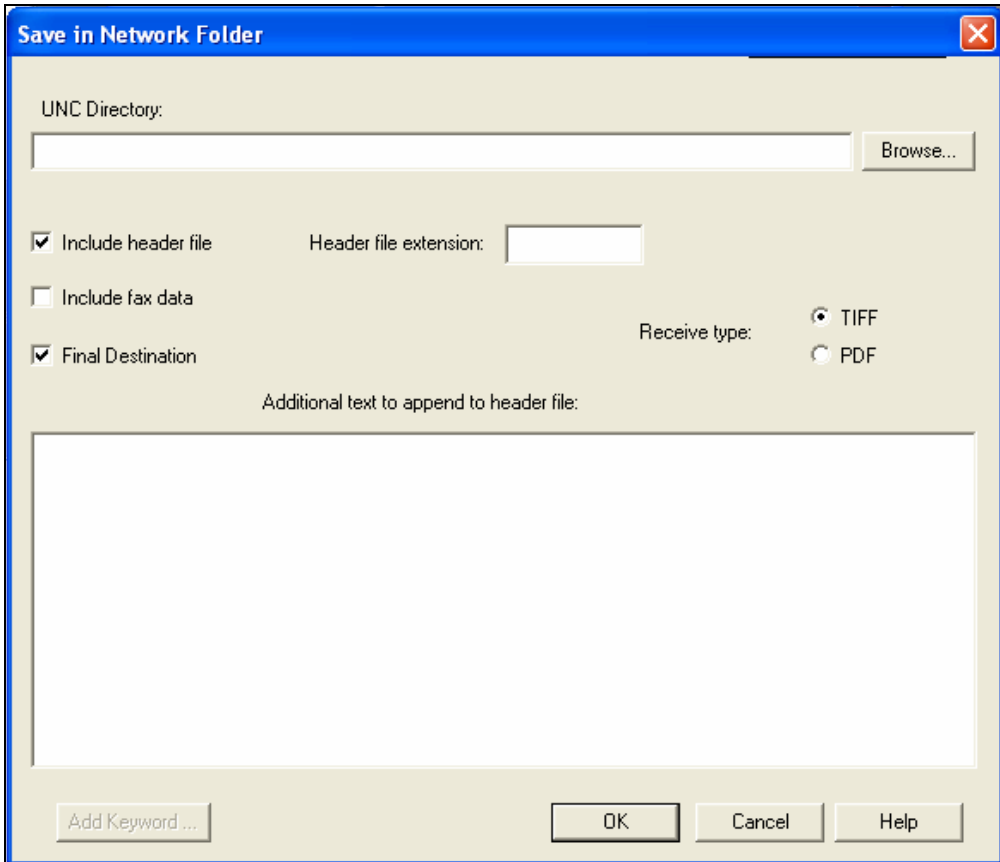


Figure 22. Save in Network Folder Dialog

UNC Directory – specify a destination directory in UNC format (`\\computername\sharename\path`), or browse for a directory using the Browse button. You can also click the Add Keyword... button to select Keywords/Variables that comprise the directory name string. Note that you can right-click in the *UNC Directory* field to display a shortcut menu with the following choices: Undo, Cut, Copy, Paste, Delete, Select All, enabling you to manipulate the items in the string as appropriate.

Include header file – check this box to specify that a header file be saved in the directory in addition to the fax image itself. Note that checking this box activates the Include Fax Data check box and the *Text* window (since you cannot include the fax data or enter any text unless there is a header file to include the fax data and/or text)

Note: If you chose the Add Note to Document action for faxes saved in a network folder, you must check the Include header file box since it is the header file that contains any note(s) added to the document.

Header file extension – specify the file extension of your choice for the header file

Include Fax Data – check this box to include in the header file the information about the received fax contained in a Fax Reception Report message, typically such information as: *Received Time, Result, Description, Result Code, Pages Received, Bad Pages, Remote TSI, Connect Time, Fax line, Routing ID, Baud Rate.*

Final Destination – check this box to specify that once the fax is delivered to the network folder, it is deleted.

Receive type – select the format in which to save the received fax, either TIFF (to be opened in a TIFF viewer) or PDF (to be opened in Adobe Acrobat Reader).

Additional text to append to header file – enter in this text window any text you want to include in the header file. If you have checked the **Include Fax Data** check box, the text is appended to the end of the fax data; if you have not checked the **Include Fax Data** check box, the entered text provides the contents of the header file (in addition to any note(s) you added to the document).

Add Keyword... – select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties, User Properties, Current Time and Date, Fax Note, or User Created Variable.*

Then select a Keyword/Variable item that will be replaced with the actual instance of the item. For e.g., select *Current Date* to name the UNC Directory with the current date, i.e., December 2, 2005. The selected item is displayed in the *To* field. If appropriate, continue to click the **Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s). You can also type a character string directly into the string in the *UNC Directory* field that you want to be included in the directory name. Click **OK**.

As an example, the following string is displayed in the *To* field by clicking the **Keyword...** button and selecting *Current Date*, then typing the string *Sales Order* directly into the *To* box, clicking the **Keyword...** button again and selecting *Current Time*, clicking the **Keyword...** button again and selecting *Faxcom* (for the name of the FAXCOM Server on which the document was received), and finally clicking the **Keyword...** button again and selecting *Pages Received*:

```
%siCurrDate%Sales Order%siCurrTime%%miwFaxcom%%miwPgs%
```

Save in Subfolder

Once you have selected the **Save in Subfolder** action and clicked **OK**, specify the following to configure the action on the Save in Subfolder dialog (Figure 23), clicking **OK** when done:

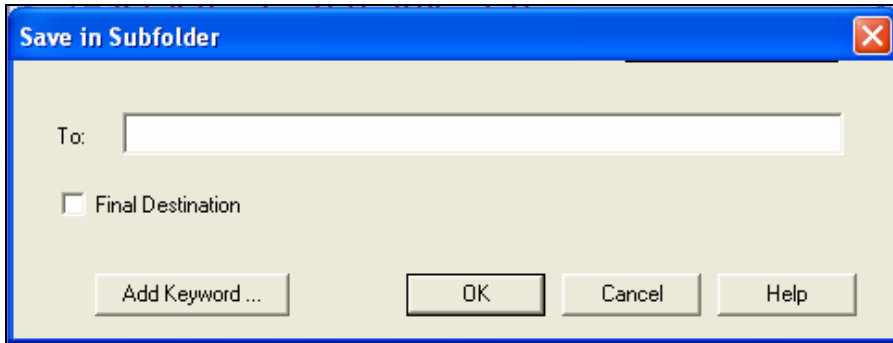


Figure 23. Save in Subfolder Dialog

To – type any text to be the name of the subfolder directly into the *To* field. Note that when your cursor is in this field, the **Add Keyword...** button is active, enabling you to select fax information properties and variables, either as the entire name or in addition to the name you specify in the *To* field.

In addition, you can right-click in the *To* field to display a shortcut menu with the following choices: **Undo**, **Cut**, **Copy**, **Paste**, **Delete**, **Select All**, enabling you to manipulate the items in the string as appropriate.

Final Destination – check this box to specify that once the fax has been saved in the specified subfolder, it is deleted.

Add Keyword... – when your cursor is in the *To* field, the **Add Keyword...** button is enabled.

A keyword represents an item of fax information data, i.e., fax properties and values of user-created variables. For example, the Keyword for the *Time Received* property is *%miTime%*.

After clicking the **Add Keyword...** button, select the appropriate data category radio button to display the available items in that data category, either *Received Fax Properties*, *User Properties*, *Current Time and Date*, *Fax Note*, or *User Created Variable*.

Then select a Property/Variable item that will be replaced with the actual instance of the item. For e.g., select *Current Date* to name the subfolder with the current date, i.e., December 2, 2005. The selected item is displayed in the *To* field. If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s). As an example, the following string is displayed in the *To* field by clicking the **Keyword...** button and selecting *Current Date*, then typing the string *Sales Order* directly into the *To* box, clicking the **Add Keyword...** button again and selecting *Current Time*, clicking the **Add Keyword...** button again and selecting *Faxcom* (for the name of the FAXCOM Server on which the document was received), and finally clicking the **Add Keyword...** button again and selecting *Pages Received*.

Split into Separate Documents

Once you have selected the **Split Fax into Separate Documents** action, do the following to configure the action on the Split fax into separate documents dialog (Figure 24, clicking **OK** when done:

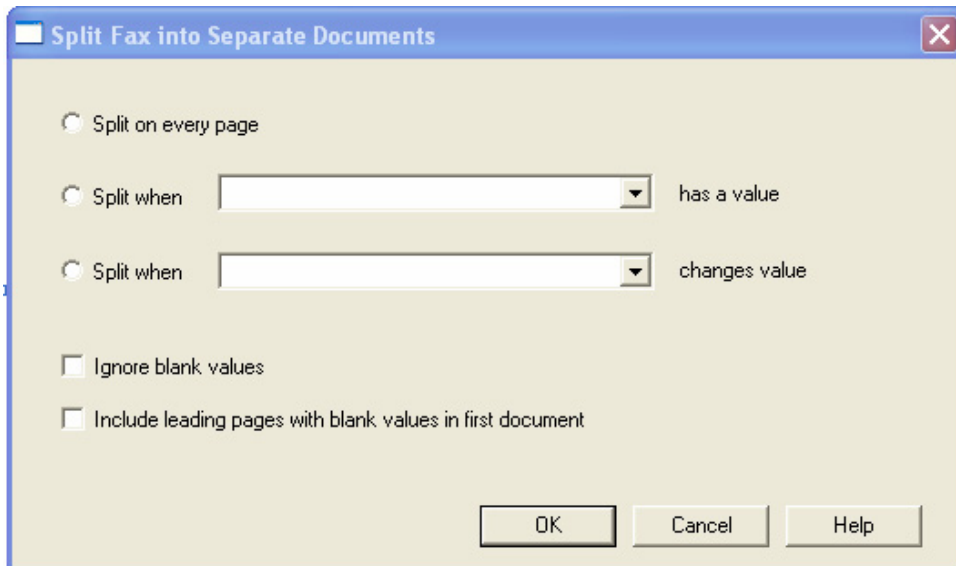


Figure 24. Split Fax into Separate Documents Dialog

Choose the appropriate radio button, where

Split on every page – select this option to specify that the action create as many separate documents as there are pages in the document.

Split when has a value – select this option to specify that the action create a separate document whenever there is a value for the variable you select, as, for example, whenever the *To: field* has a value of *Lisa*.

Split when changes value – select this option to specify that the action create a separate document whenever there is a changed value for the selected variable, as, for example, whenever the *To: field* is followed by a different name (*Michael, Linda, Carl*).

Ignore blank values – active only when you select the **Split when changes value** radio button, this check box (which is selected as the default), enables you to specify that the Split action *not* be performed when the selected variable has a blank value, as, for example, when the *To: field* is blank. A blank value, in other words, is *not* considered a changed value. Deselect (uncheck) the check box to specify that the Split action be performed when the variable value is blank.

Include leading pages with blank values in first document – this checkbox is active under the following circumstances: when the **Split when has a value** radio button is selected; when the **Split when changes value** radio button is selected *and* the **Ignore blank values** checkbox is deselected (meaning that the Split action is performed when a blank value is found for the variable).

By default, the checkbox is enabled, specifying that whenever a blank value is encountered for the specified variable, or whenever the specified variable itself is not found, those pages should be included with the first split document. For example, if the first two pages have no *To: field* variable and the third page has a blank for the *To: field* variable, those three leading pages should be included in the document that is split when a value is found for the *To: field*.

Write ODBC

Once you have selected the Write ODBC action, do the following to configure the action on the Write ODBC dialog (Figure 25), clicking **OK** when done:

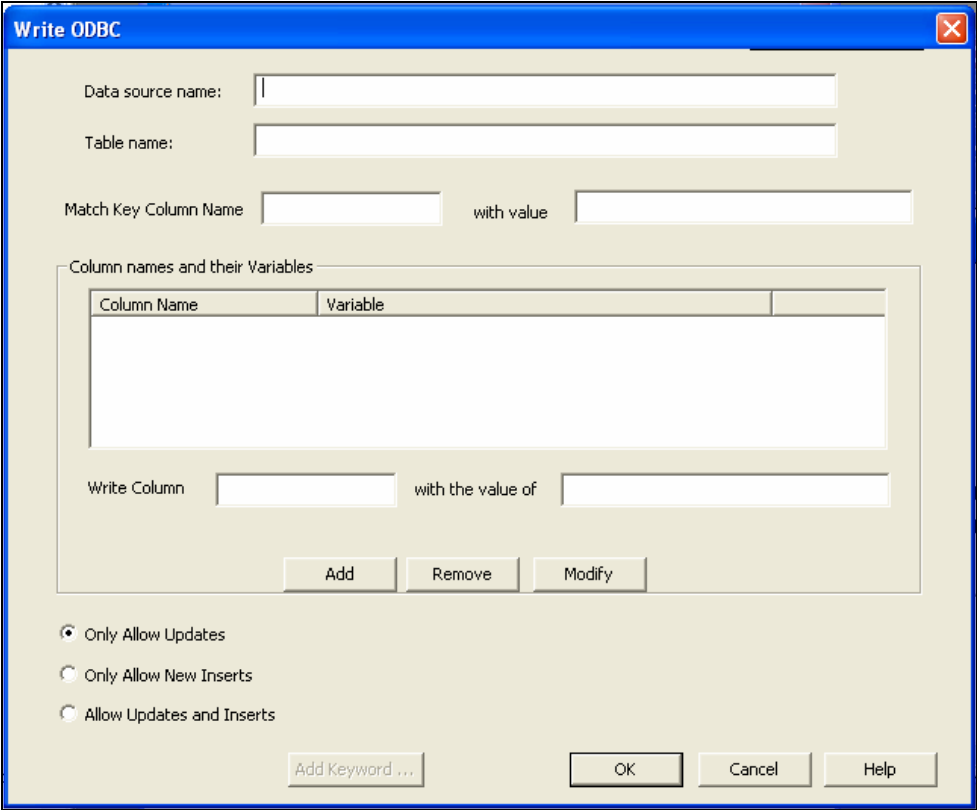


Figure 25. Write ODBC Dialog

Data source name – specify the name of the data source that stores the information about how to connect to the data provider (SQL, MySQL, Oracle). The data source must be on the same machine where the FAXCOM Queue is running.

Table name – specify the name of the particular table in the database to which to write.

Match Key Column Name – specify the name of the key column used to sort the data.

with value – either directly enter a constant as the value to match with the Key Column into the field, and/or click the **Add Keyword...** button to select a Keyword/Variable item that will be replaced with the actual instance of the item. If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s).

Write Column – specify the database field to which to write, specify the variable to write in the *with the value of* field, and then click **Add** to add the pair to the *Column names and their Variables List*.

with the value of – once you have specified the database field to write in the *Write Column* field, specify the variable to assign in this field, and then click **Add** to add the pair to the *Column names and their Variables List*.

Add – once you have specified the database field to find in the *Write Column* field, and specified the variable to assign in the *with the value of* field, click **Add** to add the pair to the *Column names and their Variables List*.

Remove – to delete an entry in the *Column names and their Variables List*, select the entry and click the **Remove** button.

Only Allow Updates – select this radio button to specify that when a match is detected, the only writing that takes place is modification of the existing data with the new value specified in the *with value* field.

Only Allow New Inserts – select this radio button to specify that when a match is detected, the only writing that takes place is an insertion of the new value specified in the *with value* field -- with no changes to existing data.

Allow Updates and Inserts – select this radio button to specify that when a match is detected, both modification of existing data and insertion of the new data specified in the *with value* field take place.

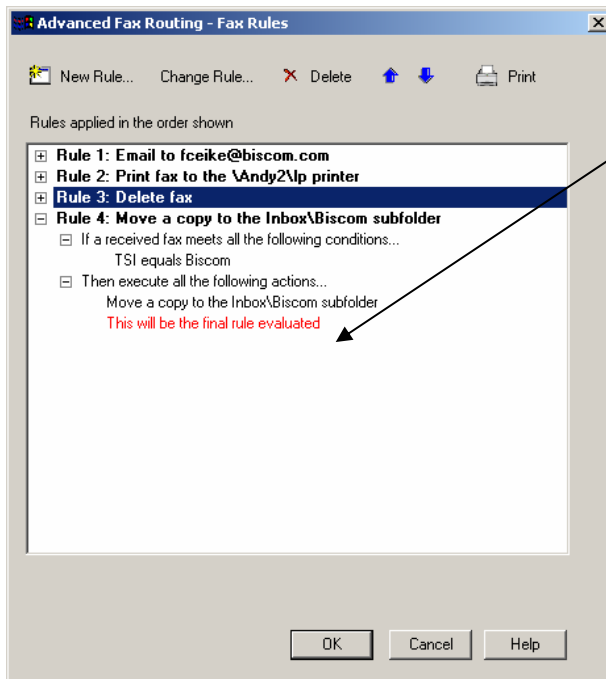
Add Keyword... – with your cursor in the *with value* field, click this button to select a Keyword/Variable item that will be replaced with the actual instance of the item as the value to match. If appropriate, continue to click the **Add Keyword...** button and select additional items to be concatenated (linked together as one string) to the previously selected item(s).

Rule that Ends Rule Evaluation

make this the final rule evaluated

Once you have selected the **make this the final rule evaluated** action, be aware that you can always do the following to toggle between the states whereby a rule is/isn't the final rule evaluated:

1. In your rule list, locate a **red line** that says **This will be the final rule evaluated**, as shown below.



- Select the **“This will be the final rule evaluated”** line and click **Delete**. The line automatically changes to **“This will not be the final rule evaluated,”** as shown below.