
AccuRoute[®] Extensions for ProLaw[®] Installation Guide

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Section I: Overview

Features

AccuRoute Extensions for ProLaw enable users to extract meta-data gathered from the standard ProLaw user interface and apply to Image-In Connect IIC actions. The meta-data is extracted with Ratchet-X components that are registered with several ProLaw client fields by default during the installation.

After the meta-data is collected, a ProLaw profile dialog is displayed through a third-party API from Bellefield. This profile dialog will be pre-populated with meta-data that was gathered, if available. The meta-data from the profile dialog is then sent to the IIC actions dialog, which shows the actions that were configured on the AccuRoute server. The following are the supported actions. Depending on your workflow, some of these actions may not be used.

- **Create a scan reservation** - Enables a user to submit documents directly to the ProLaw database after authenticating to the Personal Distribution button. This feature requires an Embedded AccuRoute device client.
- **Create a routing sheet** - Generates a routing sheet that, when placed on top of a document, will import the document to the ProLaw database with the specified meta-data. This feature requires a device client with scan to folder support.
- **Open in AccuRoute Desktop** - Launches the AccuRoute Desktop and automatically adds a ProLaw recipient. This feature requires that AccuRoute Desktop is installed on the client system.

The ProLaw DMS Connector is configured on the server (there is no ProLaw client to install in order to configure the connector).

When the message is submitted through the AccuRoute server for processing, the meta-data that was collected during the IIC actions is inserted into the appropriate fields in the imported document in the ProLaw database.

Requirements

Server 1

- AccuRoute v4.0 with AccuRoute Extensions for ProLaw
- Tier 2 DMS connector license

Server2

- The ProLaw server is the SQL server 2005 or later

Client I

- Windows 7, 32-bit or 64-bit
- .NET framework version 2 or newer installed before you install the ProLaw client
- AccuRoute Extensions for ProLaw client, as found in the **clients** directory:

```
\\accuroute_server_name\Omtool\clients\ExtensionsForProLaw
```

Note AccuRoute Extensions for ProLaw requires an internet connection. After 30 days, an error will occur without this connection.

Section 2: Installation

Installation involves two procedures, as described in this section:

[Installing the AccuRoute Extensions for ProLaw client on the client system](#) (2-1)

[Entering a license for AccuRoute Extensions for ProLaw](#) (2-2)

Installing the AccuRoute Extensions for ProLaw client on the client system

- 1 On the ProLaw client system, browse to the network for the AccuRoute server clients directory:

```
...\Omtool\Clients\Extension for ProLaw
```

- 2 Run `Setup.exe`.

Note The client install will install .NET 4.0 and .NET 3.5, as needed.

A Welcome page is displayed.

- 3 Click **Next**. Specify the **Message Server**.
- 4 When prompted, enter the ProLaw database connection string. This is the path the client will use to connect to the ProLaw database. This same connection will be used in the AccuRoute Desktop as well as the DMS connector. For example:

```
Server=[Server Name]\ProLaw;database=[Database Name];  
Trusted_Connection=[yes or no];User ID=[ID];Password=[Password];
```

For example:

```
Server=Srv100\ProLaw;database=ProLaw;Trusted_Connection=yes;User  
ID='Production\ProAdmin';Password='Pr0Admln';
```

- 5 Click **Next**.
- 6 Click **Install** to complete the installation.

Entering a license for AccuRoute Extensions for ProLaw

Note AccuRoute Client Option Packs require a license. For more information, contact Omtool Sales.

You can activate the AccuRoute Extensions for ProLaw license in one of two ways:

- Automatically when you enter an activation code and the Omtool server is on a system that has access to the internet.
- Manually if the Omtool server does not have access to the internet. In this case, you will:
 - ▶ Submit and validate the activation code.
 - ▶ Create an Export file into which the activation code is copied.
 - ▶ Create an Import file and use this file for activation from a system that does have internet access.

Automatic license activation

Be sure the Omtool server has access to the internet. Have available a copy of the activation code.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server Administrator** to start the AccuRoute Server Administrator.
- 2 Expand the tree view and select the server name.
- 3 Right-click and select the **Licensing** option. The **Licensing** page is displayed.
- 4 Click the **Activate License...** button. The **License Activation** page is displayed.
- 5 Select the **Automatically activate via the Internet** option.
- 6 Enter your license activation code in the **Activation Code** text field.
- 7 Click **OK**. The server is updated with your license.
- 8 Click **Close** to complete the procedure.

Manual license activation

Have available a copy of the activation code.

Note Although the Omtool server may not have access to the internet, to complete this procedure you will need a system that does have access.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server Administrator**.
- 2 Expand the tree view and select the server name.
- 3 Right-click and select the **Licensing** option. The **Licensing** page is displayed.
- 4 Click the **Activate License...** button. The **License Activation** page is displayed.
- 5 Select the **Export activation file for manual activation** option.

- 6 Create an Export license file:
 - a Browse to a location where you want to save the license file. By default, the file is an Export file named `ManualActivation.exp`. After specifying the file name and location, click **Save**.
 - b The path will appear in the **Export Filename** field on the **License Activation** page. Click **OK**.
- 7 From a system with internet access, launch the web browser and go to:
<https://license.omtool.com/accuroute>
The **Manual Licensing Portal** page opens.



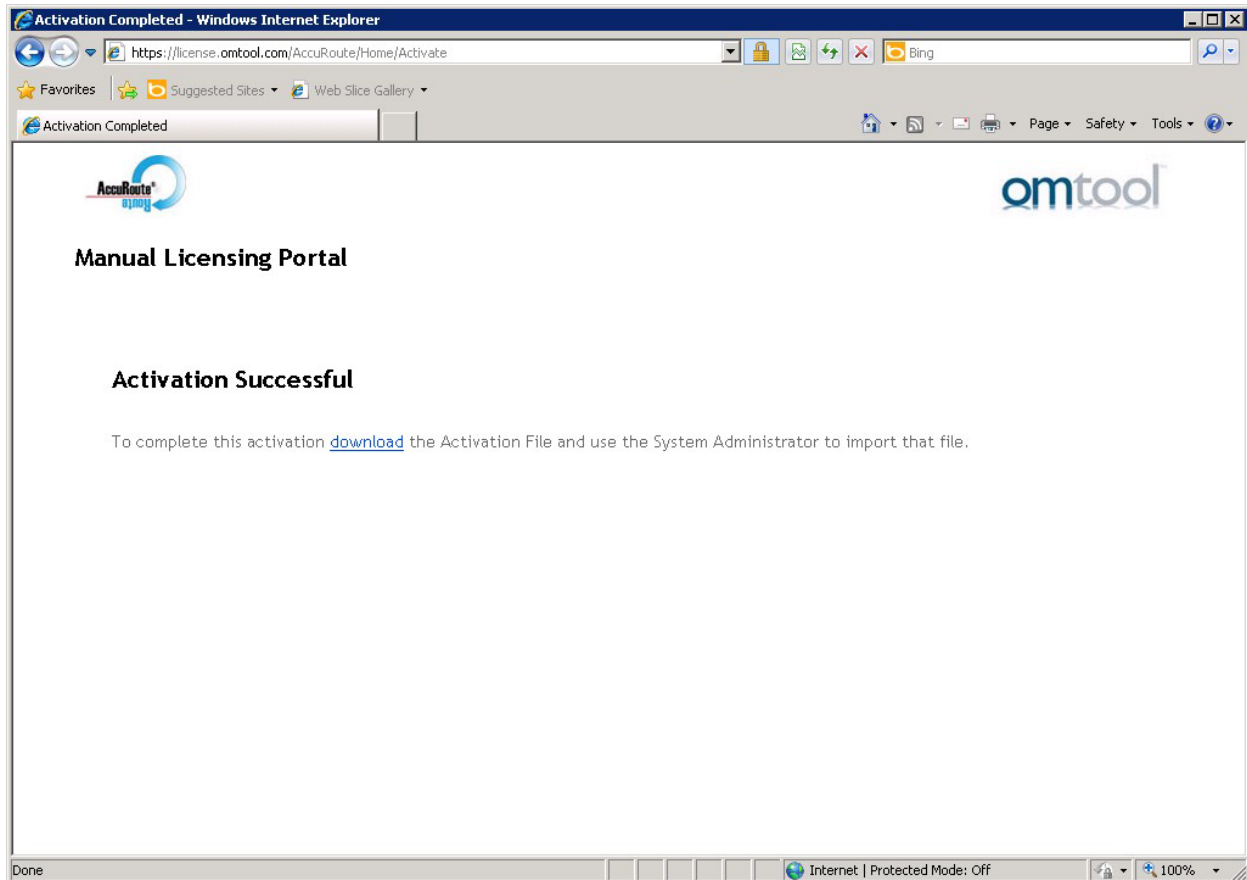
Manual Licensing Portal

Enter your activation code and select the Exported Activation File made using the Server Administrator.

Activation Code:	<input type="text"/>
	<input checked="" type="radio"/> Activate License <input type="radio"/> Deactivate License
Exported Activation File:	<input type="text"/> <input type="button" value="Browse..."/>
<input type="button" value="NEXT >"/>	

- 8 Enter your license activation code in the **Activation Code** text field.
- 9 Be sure the **Activate License** option is selected (the default).
- 10 Click the **Browse** button to select the `ManualActivation.exp` file created in Step 6. With the file name selected (highlighted), click **Open**.
- 11 Verify that the license information is entered correctly on the **Manual Licensing Portal** page.

12 Click **NEXT** and the **Activation Successful** message is displayed.



13 To complete the activation, click **Download**. The **File Download** page is displayed.

14 Click **Save** to create the Import file. By default, the file is named with the activation code. You can change this (for example, [ManualActivation.imp](#)) and select a location for the file on the Omtool server.

15 Click **Save**. The **Download Complete** page shows that status of the file download.

16 Click **Close**.

Note You can minimize or close the browser.

17 On the **Licensing** page, click the **Activate License...** button.

18 Select the **Import activation file from manual activation** option.

19 Browse to the saved [ManualActivation.imp](#) file. Select the file and click **Open**.

20 Click **OK** on the **License Activation** page. The license is updated.

21 Click **Close** to complete the procedure.

Section 3: Configuration

This section includes procedures for:

[Configuring the AccuRoute connector for ProLaw DMS](#) (3-1)

[Creating Property Dictionary Items](#) (3-2)

[Configuring the Image-In Connect node](#) (3-3)

[Creating the ProLaw template](#) (3-4)

[Configuring Image-In Connect groups on the AccuRoute server](#) (3-4)

Configuring the AccuRoute connector for ProLaw DMS

This required configuration is done from the AccuRoute server. All documents that are processed by the AccuRoute server are sent to ProLaw via the AccuRoute connector for ProLaw.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server Administrator**.
- 2 Right-click on **Connectors** and select **New AccuRoute Server connector for > ProLaw**. The **Server Address** page opens.
- 3 Select the Server Address option:
 - ▶ **Run on the Message Server**
 - ▶ **Remote Server** and enter the server address in the text box.
- 4 Click **Next**. The **Display Name** page opens.
- 5 In the **Name** text box, enter a friendly name for the connector.
- 6 Click **Next**. An installation summary is displayed.
- 7 Click **Finish**. The **DMS Configuration** page opens.
- 8 Enter the connection string:

```
Server=[Server Name];Trusted_Connection=[yes or no];  
User ID=[ID];Password=[Password];
```

For example:

```
Server=Srv100\ProLaw;Trusted_Connection=yes;  
User ID='Production\ProAdmin';Password='Pr0Admln';
```
- 9 Click **Test** to test the connection string to the ProLaw database.
- 10 After a successful connection message, click **Finish** on the **ProLaw Configuration** dialog.

Creating Property Dictionary Items

You will need to configure the following property dictionary items:

- DMSMatterID
- DMSDocDescription
- DMSDocTypeID
- DMSDocClassID
- DMSDocAuthor

The example used in the following procedure creates the required property **DMSMatterID**.

- 1 Click **Start > All programs > Omtool > AccuRoute Server Administrator**.
- 2 Expand the tree view and navigate to **Configuration**.
- 3 Right-click on **Properties** and select **New > Property Dictionary**.
- 4 Enter information for the new property on the **General** tab. Add the following:
 - ▶ Name: `DMSMatterID`
 - ▶ Label: `DMSMatterID`
 - ▶ Instructions: `DMSMatterID`
 - ▶ Type: **Text**
- 5 In the **Mappings** section, click **New** to open the **Property Definition** page.
- 6 Select **OPath** mapping and enter:


```
\\prDestinationData\prDMSDocMatterID
```
- 7 Click **OK** to create the property. It is listed in the **Properties** details pane.

Configure the procedure above for the DMSDocDescription, DMSDocTypeID, DMSDocClassID, and DMSDocAuthor properties. Use the guidelines in the table below.

Table 3-1: Guidelines for configuring property dictionary items

Property Name	Type	General tab: Mapping
DMSMatterID	Text	<code>\\prDestinationData\prDMSDocMatterID</code>
DMSDocDescription	Text	<code>\\prDestinationData\prDMSDocDescription</code>
DMSDocTypeID	Text	<code>\\prDestinationData\prDMSDocTypeID</code>
DMSDocClassID	Text	<code>\\prDestinationData\prDMSDocClassID</code>
DMSDocAuthor	Text	<code>\\prDestinationData\prDMSDocAuthor</code>

Configuring the Image-In Connect node

The AccuRoute server requires that Image-In Connect is configured properly in order for it to work with AccuRoute Extensions for ProLaw. In the following procedure, you will map ProLaw X-models within the `omProLaw.appspace` file to configure the associated properties created on the AccuRoute server.

- 1 Click **Start > All Programs > Omtool > Omtool Server Administrator**.
- 2 Open the AccuRoute server console.
- 3 Click **Configuration > Image-In Connect**.
- 4 Double-click on `omProLaw.appspace`.
- 5 In the **Reg Wins** section, click on `omProLawRegWin`. Click the **Properties** button.
- 6 In the **X-Model Mappings** section, highlight `OM_PROLAW_XMODEL.omProLawMatterID` and click **Properties** to open the **Meta-Data Value Mapping** dialog.
- 7 In the **Property** drop-down, select `DMSMatterID`. (Note that the `DMSMatterID` property must be created, as described in [Creating Property Dictionary Items](#)).
- 8 In the **Direction** section, select **Transfer from X-Model to AccuRoute Property**.
- 9 Click **OK**.
- 10 Complete the steps above for the `DMSDocDescription`, `DMSDocTypeID`, `DMSDocClassID`, and `DMSDocAuthor` properties. Refer to the table of guidelines below.

Table 3-2: Guidelines for configuring ProLaw X-models and properties

<i>IIC Linked to:</i>	<i>Property</i>
OM_PROLAW_XMODEL.omProLawMatterID	DMSMatterID
OM_PROLAW_XMODEL.omProLawNotes	DMSDocDescription
OM_PROLAW_XMODEL.omProLawType	DMSDocTypeID
OM_PROLAW_XMODEL.omProLawClass	DMSDocClassID
OM_PROLAW_XMODEL.omProLawProfessional	DMSDocAuthor

- 11 Click **OK** several times to complete the procedure.

Creating the ProLaw template

The following procedure will enable you to create a template to use for the Image-In Connect options. This procedure requires the use of the AccuRoute Desktop client (refer to the [AccuRoute Desktop Client Installation Guide](#) for installation instructions).

- 1 On a client system, launch the AccuRoute Desktop.
- 2 Configure the ProLaw DMS. To do so, select **Tools, Configure DMS > ProLaw**, and the same path as used for the DMS connector:

```
Server=ProLawServer\ProLawDatabase;database=ProLawDatabaseName:Trusted_Connection=yes:User ID='domain\username';Password='password'
```
- 3 Click **Test...** to verify the connection string is correct.
- 4 Click **Finish** to complete the configuration.
- 5 Select **New** from the file menu.
- 6 In the **Recipients** section, select ProLaw as the **Type** and select the format to be used as the final form.
- 7 Click **Add**.
- 8 When the Bellefield API launches, profile a document and save the directive as **ProLawTemplate**.

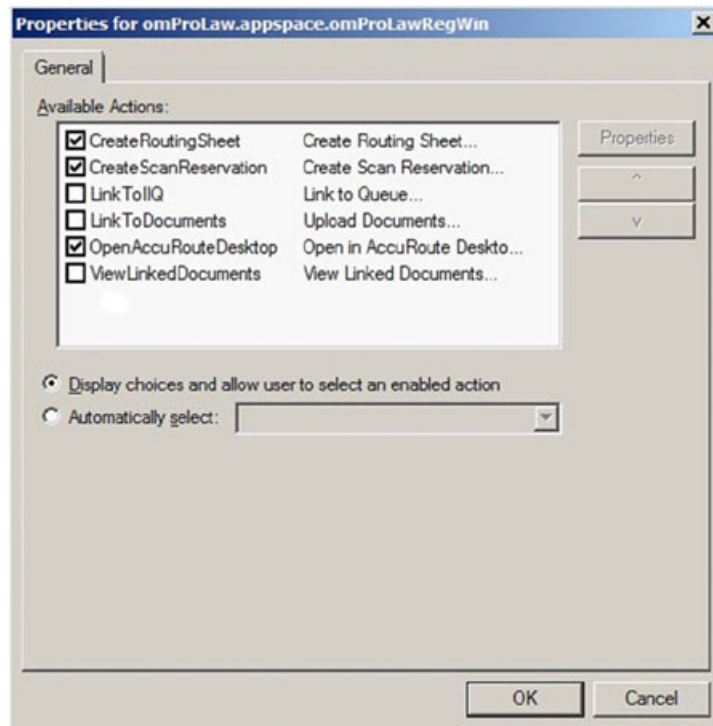
Note The Bellefield API does not always appear as the main focus. You may need to minimize other windows.

Configuring Image-In Connect groups on the AccuRoute server

Image-In Connect needs to have its Actions enabled and configured in the way you need to use them.

- 1 Open the AccuRoute server console.
- 2 Click **Configuration > Groups**.
- 3 Double-click on the **Default** group (or applicable).
- 4 Click on the **Image-In connect** tab.
- 5 Select **Enable members of this group to use the selected integrations**.
- 6 Select the `omProLaw.appspace`. Highlight the text and check the box.
- 7 Click the **Properties** button.

- 8 Under **Available Actions**, select one or all of the following actions: **CreateRoutingSheet**, **CreateScanReservation**, and/or **OpenAccuRouteDesktop**.

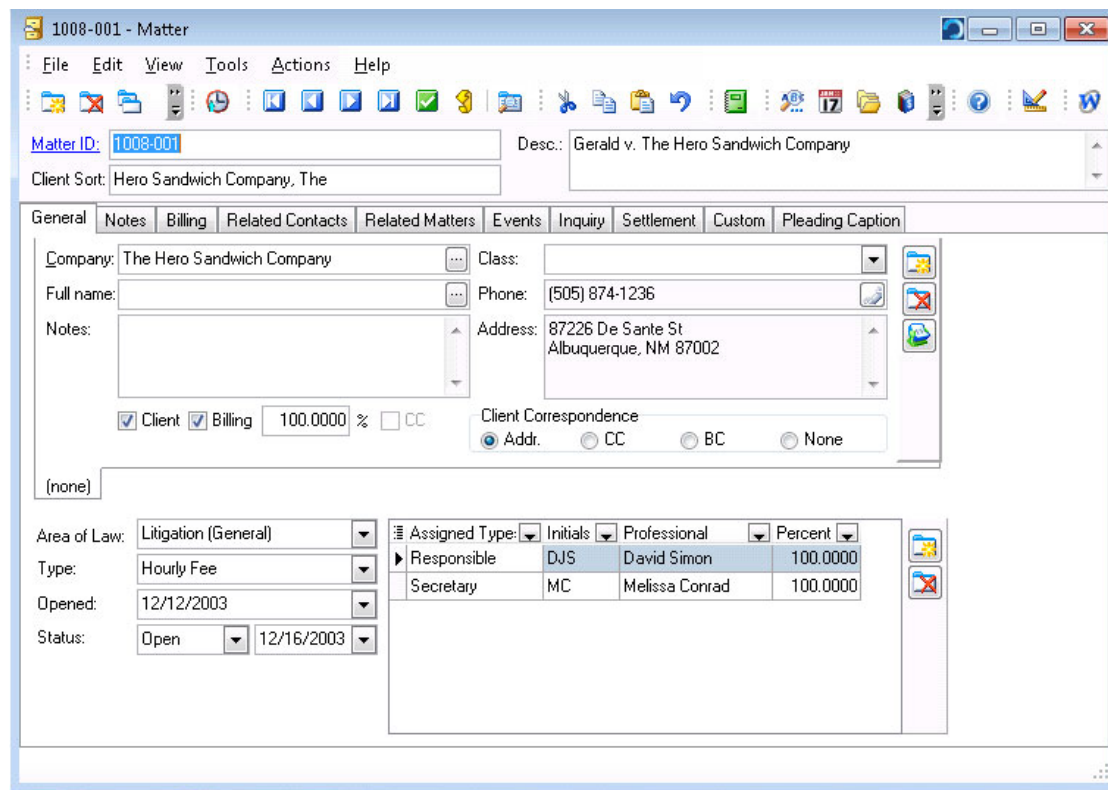



- 9 Select **Display choices and allow user to select an enabled action**.
- 10 Highlight **CreateRoutingSheet** and click **Properties**.
- Under the **General** tab, select **Allow user to invoke this action**.
 - Click the **Options** tab. Select the ellipsis (...), search for the **ProLawTemplate**, and select it.
 - Click the **Select** button.
 - Add a name in the space provided. Select **Prompt user to enter name**.
 - Click **OK**.
- 11 Highlight **CreateScanReservation** and click **Properties**.
- Under the **General** tab, select **Allow user to invoke this action**.
 - Click the **Options** tab. Select the ellipsis (...), search for the **ProLawTemplate**, and select it.
 - Add a name in the space provided. Select **Prompt user to enter name**.
 - Click **OK**.
- 12 Highlight **OpenAccuRouteDesktop** and click **Properties**.
- Under the **General** tab, select **Allow user to invoke this action**.
 - Click the **Options** tab. Select the ellipsis (...), search for the **ProLawTemplate**, and select it.
 - Add a name in the space provided. Select **Prompt user to enter name**.
 - Click **OK**.
- 13 Click **OK** to save group properties.

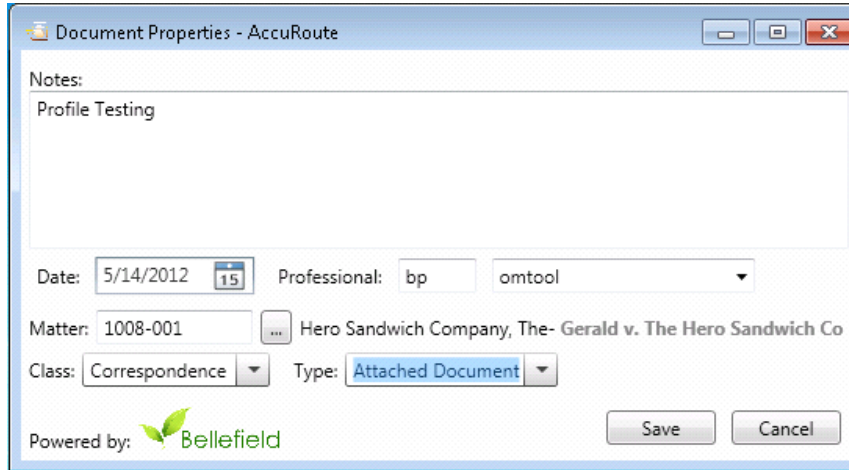
Section 4: Testing

Testing the AccuRoute Extensions for ProLaw client

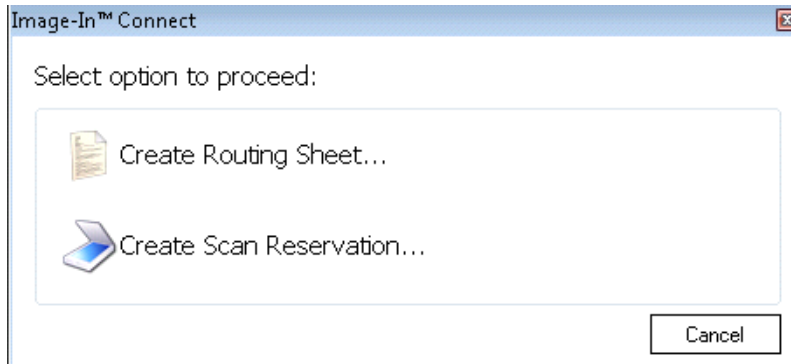
- 1 Launch the ProLaw client.
- 2 Select **Matters** in the left panel.
- 3 Select the **search for:** window and click **Enter**. The sample database of matters should appear.
- 4 Select a matter and double-click to open the details. You should see the Ratchet-X **Magic** button in the upper right above the menu bar on this screen:



- 5 Click the Ratchet-X **Magic**  button. The Bellefield profile dialog will appear. (This dialog may appear behind all of the screens.)



- 6 Enter **Notes**.
- 7 Select the **Class**.
- 8 Select the **Type**.
- 9 Click **Save**. The Image-In Connect dialog appears. This example displays the options to create a routing sheet or scan reservation.



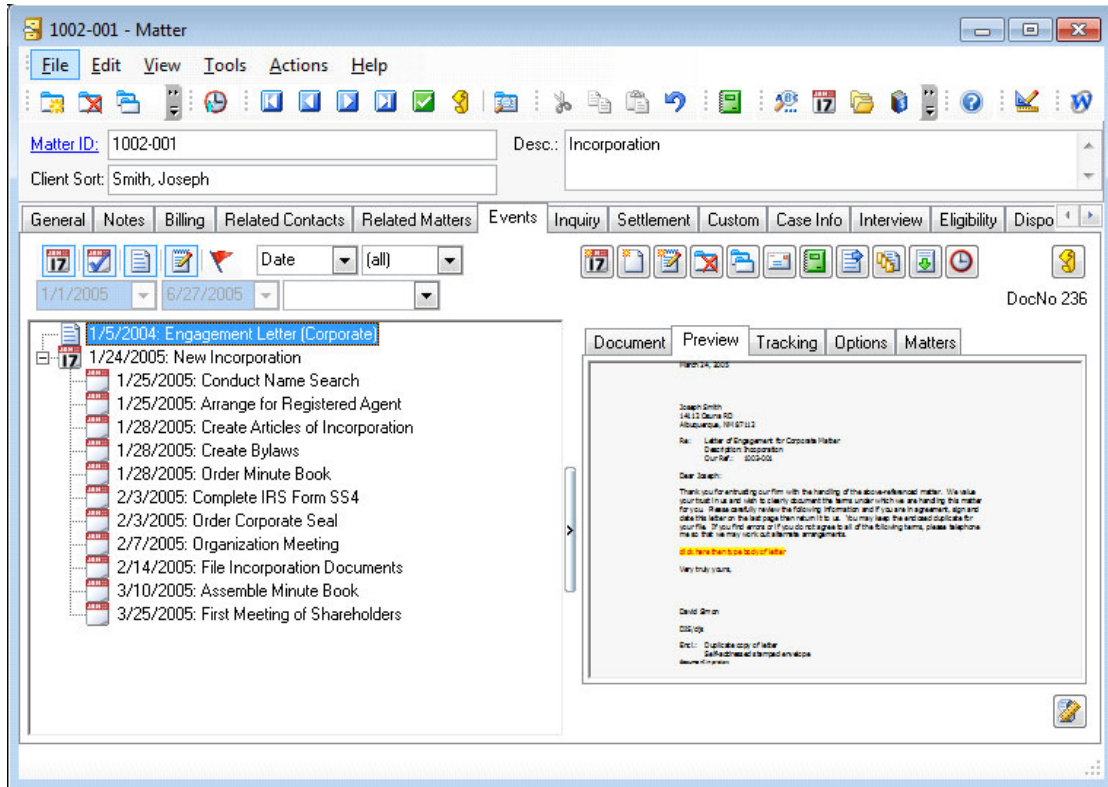
- 10 Create a Routing Sheet and save it to the desktop.
- 11 Launch AccuRoute Desktop. Select the Routing sheet and an attachment. Send these to the server.

Note Verify that you have a rule this will match to use the Embedded Directive Manager to determine actions. For example:

email to PL@PL.com use ED MGR

- 12 Verify that the attached document is imported into the ProLaw client.
- 13 Launch ProLaw, select **Matters**, click **Enter**, and select the matter previously selected for the profile actions.
- 14 Click the **Events** tab and notice that the document is listed on the left.

For example:



Section 4: Testing