AccuRoute® Server and Clients Upgrade Guide

Upgrading to AccuRoute v4.0

May 2013

omtool™

Omtool support and sales

Online resources

The Omtool web site provides you with 24-hour access to documentation, software updates and other downloads, and detailed technical information that can help you troubleshoot issues. Go to http://www.omtool.com/support and log in using your customer number. Then click one of the following:

- **Knowledge Base** to access technical articles.
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Contact Omtool Customer Service or Technical Support using any of the following methods:

- **Phone**: +1/1 978 327 6800 or +1/1 888 303 8098 (toll-free in the US)
- **Fax**: +1/1 978 659 1301
- **E-mail**: customerservice@omtool.com or support@omtool.com

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- **Phone**: +1/1 978 327 5700 or +1/1 800 886 7845 (toll-free in the US)
- **Fax**: +1/1 978 659 1300
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Section 1: Introduction

This Upgrade Guide contains instructions on upgrading your legacy AccuRoute environment to AccuRoute Server v4.0. It is written for the Omtool Server administrators with detailed knowledge of AccuRoute, the Windows operating system and the LAN.

About AccuRoute

AccuRoute is Omtool's award-winning document-handling platform that captures, converts, routes and archives both paper and electronic-based documents enabling fast, secure, simultaneous distribution of data to multiple destinations in multiple formats. Using AccuRoute, an organization can deliver information faster with more efficient work flows while reducing the cost, complexity and risk.

About the upgrade

The steps involved in upgrading a legacy AccuRoute Server to AccuRoute v4.0 are as follows:

- Preparing the legacy AccuRoute Server for the upgrade. The following versions are qualified for upgrading to AccuRoute Server v4.0:

  - AccuRoute Server v3.01

  - AccuRoute Server v3.01 Feature Pack 6

  - AccuRoute Server v3.01a Feature Pack 6

  - AccuRoute Server v3.01 Roll Up 2

- Upgrading the following interfaces: AccuRoute Server, Remote Administrators, Remote AccuRoute Compose Components (Composers), Remote AccuRoute Connectors for DMS Libraries, Remote Embedded Directive Managers, Remote Modem Servers and clients.

- Configuring the AccuRoute Server if necessary.

- Verify that all existing licenses have been regenerated for the AccuRoute v4.0 licensing model.

  Note   The license model for AccuRoute Server v4.0 has changed and new licenses need to be generated prior to running the upgrade. Please contact Omtool support and sales with your licensing questions.

Supported upgrade environment

The following sections list the supported operating systems, server, client, database and modem versions. Use the information as a checklist and ensure you have the supported versions before you start the upgrade.

Server Operating Systems

- Windows$^®$ 2008 R2 64 bit
- Windows 2003 SP2 64 bit

Databases

- Microsoft$^®$ SQL Server 2008
- Microsoft SQL Express 2008

> *Important*   Microsoft SQL 2005 is no longer supported. If you are using SQL 2005, Omtool requires that you upgrade to SQL 2008 or SQL Express 2008 prior to upgrading your AccuRoute Server.

Modem boards

- Dialogic$^®$ Brooktrout$^®$ TR1034 or SR140 with Boston v6.x drivers
- Dialogic Brooktrout Trufax RoHS only with Boston v6.x drivers

> **Note**   Trufax board models that are older than those listed above are not supported.

Omtool Server

- AccuRoute Server v3.01
- AccuRoute Server v3.01 Feature Pack 6
- AccuRoute Server v3.01a Feature Pack 6
- AccuRoute Server v3.01 Roll Up 2

Client Operating Systems

- Windows 2008
- Windows 2003 SP2
- Windows XP SP3 Professional
- Windows 7

AccuRoute Desktop

- AccuRoute v3.0x

> **Note** AccuRoute Desktop versions older than v3.0x are not supported.

Important information on Remote Administrators, Composers, AccuRoute Connectors for DMS Libraries, Embedded Directive Managers and Modem Servers

All systems in your environment must use the same version of AccuRoute. Therefore, when you decide to upgrade your legacy AccuRoute Server to AccuRoute v4.0, you must upgrade all systems that comprise your environment. This includes Remote Administrators, Remote Composers, Remote AccuRoute Connectors for DMS Libraries, Remote Embedded Directive Managers and Remote Modem Servers.

> *Important* Once you upgrade the AccuRoute Server, all Remote Composers go off-line until you upgrade them.

Note about ObjectArchive™ database

If you are planning to set up and use ObjectArchive, verify that the system where you will install ObjectArchive meets the following hardware and software requirements.

- ❒ Windows NT domain computer that always runs in the same domain as the AccuRoute Server
- ❒ Dual core processor; 2 GHz; 4GB of RAM; RAID 5W with 100 GB of disk space; DVD-ROM drive; and Microsoft mouse or compatible pointing device
- ❒ Windows 2008 R2 64 bit, 2003 Standard Edition SP2 64 bit
- ❒ MS SQL Server 2008 or MS SQL Express 2008

> **Note** ObjectArchive must be installed on a system remote from AccuRoute Server. The SQL Server does not have to be the same one used for the AccuRoute Server databases.

Note about Remote AccuRoute Intelligent Device Client

When you upgrade your AccuRoute Server, you must upgrade all instances of the remote AccuRoute Intelligent Device Client in your environment. For instructions on installing, configuring and removing the remote client, consult the [AccuRoute Server installation and integration guide](#).

Note about Composers

When you install AccuRoute Server v4.0 as a new install, it creates one General Composer and one OCR Composer. This allows for the OCR Composer to be off-loaded more easily, freeing up valuable system resources.

However, when you upgrade from a legacy server to AccuRoute Server v4.0, you may have only one instance of the Composer since the upgrade will not change your Composer configuration. You can add additional Composers, and configure a Composer to handle only OCR jobs. Contact Omtool Sales for more information.

Note about AccuRoute clients

The installation setup files for the AccuRoute clients are located in the Clients directory of the AccuRoute Server. After you have finished installing the AccuRoute Server, you must configure the Clients folder within the Omtool directory. This is necessary because systems which will install the AccuRoute Desktop and other clients remotely must have access to this folder containing the setup files. For instructions on how to configure the share, see Configuring the client install directory share (3-11).

Note	AccuRoute Desktop Clients v3.0x or higher are supported with AccuRoute Server v4.0. Therefore, if you have AccuRoute Desktop Clients v3.0x deployed in your environment, upgrading them to v4.0 is not a requirement. However, Omtool recommends that you upgrade to the latest version of AccuRoute Desktop client to take advantage of the latest features.

Important information about server clusters

AccuRoute is a cluster-aware application. If you plan to use the server cluster functionality after the upgrade, consult *Appendix A: Setting up an AccuRoute Server cluster* section in the AccuRoute Server Installation and Integration Guide for an overview of the clustering functionality and instructions on setting up the cluster.

Note	Read this upgrade manual in its entirety and plan your upgrade accordingly. If you have additional questions or require assistance in upgrading, contact Omtool support.

Related AccuRoute 4.0 documentation

For more information about AccuRoute Desktop and other AccuRoute products, refer to the AccuRoute v4.0 documentation home page to access:

- Readmes and release notes
- DMS Libraries quick start guides
- User guides and online help
- Administrator guides
- Installation and upgrade guides

Section 2: Preparing for the Upgrade

This section includes:

Verifying the version of your AccuRoute Server

You can upgrade to AccuRoute Server v4.0 from the following AccuRoute versions:

- AccuRoute Server v3.01

- AccuRoute Server v3.01 Feature Pack 6

- AccuRoute Server v3.01a Feature Pack 6

- AccuRoute Server v3.01 Roll Up 2

> **Note** If you are running AccuRoute v2.3, first upgrade to one of the v3.01 options above and then follow the instructions in this guide to upgrade to v4.0.

To check the version of your server:

1   Start the Omtool **Server Administrator**.

2   In the console tree, right-click the **AccuRoute Server** name.

3   Select **Properties** from the drop-down menu.

    The version is listed in the **General** tab of the **Properties** page.

4   Verify that the version of the server is one of the AccuRoute v3.01 options listed above.

Preparing the AccuRoute Server

This section includes:

You must prepare the AccuRoute Server and the systems in the environment before you upgrade.

Verifying a Windows Active Directory environment

Before you proceed further, verify that the system where the AccuRoute Server is running has an active Windows Active Directory. This is of critical importance since AccuRoute v4.0 can only be installed in a Windows Active Directory environment. All server security and authentications are dependent on the Active Directory authentication.

Verifying that the DSN registry key contains an ODBC connection string

The database for the AccuRoute Server requires an ODBC connection. Before you upgrade, check the DSN registry key and verify that it contains a complete ODBC connection string (and not a reference to a predefined data source).

1   Click **Start > Run** to open a Windows command prompt.

2   Enter `regedit`. Click **OK**.

    The **Registry Editor** opens.

3   Navigate to **HKEY_LOCAL_MACHINE > Software > Omtool > Genifax > Current Version > DSN**

4   Verify that the DB entry has a value beginning with `Driver = {SQL Server}`.

5   If necessary, build the connection string using the following syntax:

    `Driver={SQL Server}; Server=ServerName; Database=AccuRoute Server; UserID=""; Password="";`

    where,

    ▸   `Server` is the name of the system where you installed the SQL Server.

> ‣ `Database` is the name of the database. **AccuRoute Server** is the default database for AccuRoute Servers.
>
> ‣ `UserID` and `Password` are the login credentials to be used for the database authentication.

> **Note**   If you are using Windows authentication, use null values as shown above. If you are using SQL authentication, use appropriate values for user name and password.

6   In a text file, note down the database name used in this key. You will need to supply the database name while backing up the database.

7   Close the registry editor.

Backing up the database

> *Important*   Before you upgrade, you must back up all the existing AccuRoute databases using the instructions below.

1   Log in to the system which has a given AccuRoute Server database.

2   Click **Start > All Programs > Administrative Tools > Services**.

3   Locate all Omtool services.

4   Right-click each service and click **Properties** from the drop-down menu.

5   On the **Properties** page, go to the **Startup type** section and select **Disabled** from the drop-down menu.

6   Stop all Omtool services.

7   Using the Task Manager, verify that all Omtool processes (beginning with Om*) are stopped.

8   Click **Start > Run** to open a Windows command prompt.

9   Back up the database using instructions provided by Microsoft in http://msdn.microsoft.com/en-us/library/ms130214(SQL.90).aspx.

   If necessary, change the name of the database while backing it up. You can also change the name of the backup file and the file path.

10   Locate the Omtool services and set the Startup Type to **Automatic**.

11   Start all Omtool services.

Backing up the server

Before you upgrade, you must back up the server in addition to backing up your database. For information on how to backup your server, log in to the Omtool Knowledge Base using your customer number and see this article: https://www.omtool.com/support/kbArticle.cfm?aID=1431.

Disabling the cleanup task

Before you upgrade, you must disable the cleanup task so that it cannot run during the server upgrade.

1 Open the Server Administrator.

2 Click **Start > All Programs > Omtool > Omtool Server Administrator** to open the Administrator.

3 Expand the console tree and click **Components**.

4 Double-click the **Maintenance** component to open the **Properties** page.

5 Click **Advanced** to open the **Maintenance Advanced Properties** page.

6 Click **Schedule**.

A popup opens prompting you to provide the username and its associated password.

7 Enter the user name and password that was provided during server installation.

8 Clear the **Enabled (scheduled task runs at specified time)** option.

9 Click **OK** and then **OK** again to save your changes.

Backing up the templates

The setup program for the server upgrade overwrites all the files in these directories. Before you upgrade, you must back them up prior to running the server upgrade.

1 Make a backup copy of the `Templates` directory.

The `Templates` directory is located in:
`C:\program Files\Omtool\Omtool Server\Languages\ENU\Templates` where `C:` is the drive where the AccuRoute Server is installed.

2 Make a backup copy of the `Embedded Directives` directory.

This directory is located in:
`C:\program Files\Omtool\Omtool Server\Languages\ENU\EmbeddedDirectives` where `C:` is the drive where the AccuRoute Server is installed.

> **Note** These directories contain cover page templates, routing sheet templates, and notification templates for your server.

Reviewing custom views

Before you upgrade, it is recommended that you review your custom views and note the criteria you used to create them.

> *Important* This is a necessary step without which you will not be able to recreate them, if necessary, after the server upgrade.

To locate your custom views:

1   Click **Start > All Programs > Omtool > Omtool Server Administrator** to open the Administrator.

2   In the console tree, expand the **Server Administrator** node and select **Messages.**

    Both **In Process** and **History** are standard system views. Any other options you see under **Messages** are **Custom Views**.

Obtaining login credentials of the system running the AccuRoute Server

During the server upgrade, the setup program prompts you for login credentials of the server account. (This is the same account you used to install the AccuRoute Server.) Before you upgrade, make a note of the login credentials of the system running the server.

Assigning distributed COM permissions

The AccuRoute Server requires that the server account and other system-related accounts have particular Distributed COM permissions. Before you upgrade, verify that the proper DCOM permissions are configured.

Configuring DCOM permissions on Windows 2008 and on Windows 2003

If you are using a Remote AccuRoute Intelligent Device Client, you must add Anonymous to the list of users and give the Anonymous user access, launch and activation permissions. For details, consult the [AccuRoute Server Installation and Integration Guide](#).

1   Log in to the system where you will install AccuRoute Server using the login credentials of the local Administrators group.

2   Click **Start > Run**. Enter `dcomcnfg` and click **OK**. The **Component Services** snap-in opens.

3   Expand **Component Services > Computers**. Right-click **My Computer** and select **Properties** from the menu options.

4   Click the **COM Security** tab.

5   Under **Launch and Activation Permissions**, click the **Edit Limits** button, and then click the **Add** button.

6   Add **Anonymous Logon** in the **Permissions** list, select the **Allow check box to allow the Local Launch** permission, **Local Activation** permission, **Remote Launch** permission, and **Remote Activation** permission for the selected group.

7   Click **OK** twice to save changes.

8   Restart the system for these configuration changes to take effect.

Cancelling messages in the In Process Queue

When preparing for the upgrade, you must wait for all messages to complete or cancel all messages in the **In Process** queue.

> **Note** Any message located in the In Process queue at the time of the upgrade fails to compose; the message journal indicates that.

You must also notify AccuRoute users that they cannot send documents and faxes until the server upgrade and configuration is complete. It is recommended that you upgrade the server during off hours or when the volume of documents and faxes is low.

To cancel messages in the In Process queue:

1   Click **Start > All Programs > Omtool > Omtool Server Administrator** to open the Administrator.

2   Expand the console tree and go to **Messages > In Process**.

3   In the **Details** pane, select **All Items** in the **View** menu.

4   Select all the items in the list. Right-click and select **Cancel** from the drop-down options.

    You are prompted to confirm or cancel the operation.

5   Click **Yes**.

Verifying Internet Explorer Enhanced Security Configuration is disabled

Verify that the Internet Explorer Enhanced Security Configuration is disabled.

> **Note** You cannot upgrade to AccuRoute v4.0 if the Internet Explorer Enhanced Security Configuration is enabled. If it is enabled in your system, disable it and reboot the system before proceeding with the upgrade.

1   Click **Start > Control Panel > Add or Remove Programs**.

2   In the **Add or Remove programs** page, click **Add/Remove Windows Components**. The **Windows Component wizard** opens.

3   Scroll down the Components list to find **Internet Explorer Enhanced Security Configuration**.

4   Verify that the component is disabled. If it is enabled, disable the component.

5   Manually start the SQL service.

> *Important*   When Internet Explorer Enhanced Security Configuration is disabled, the SQL service stops automatically. You must start the service before you can upgrade.

6   Reboot the system.

Enabling 8.3 Name Creation on NTFS Partitions

You must enable 8.3 Name Creation on NTFS Partitions to allow Ghostscript to work with long filenames or with spaces/odd characters in the filename during conversion.

1 Click **Start > Run**.

2 In the **Open** text box enter `regedit` to open the registry editor.

3 Go to `HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\FileSystem`.

4 Right click the `NtfsDisable8dot3NameCreation` entry and select **Modify** from the drop-down menu.

5 The **Edit DWORD Value** page opens.

6 In the **Value data** text box, enter `0`.

7 Click **OK** to close the page.

Verifying fax board drivers (for servers with fax capability)

The upgrade supports all new fax board drivers/modules for all supported fax boards including Dialogic Brooktrout Technology SR140, TR1034 series, and TruFax RoHS series. It is recommended that you update the drivers for your fax boards during an upgrade.

The supported fax board drivers are:

- Dialogic Brooktrout TR1034 or SR140 with Boston v6.x drivers
- Dialogic Brooktrout Trufax RoHS only with Boston v6.x drivers

Important Non-RoHS TruFax boards are not supported in AccuRoute v4.0.

Reviewing configuration data for the AccuRoute Connector for LexisNexis® Concordance®

If you are using a AccuRoute Connector for LexisNexis Concordance, review and note the configuration details. You will need this data to reconfigure the connector after the server upgrade.

Note If you are using AccuRoute Connector for CT Summation or AccuRoute Connector for FTI® Ringtail™, no review or reconfiguration is needed after the upgrade.

Note about Litigation Support Interface for CT Summation

There is no automatic upgrade of the old AccuRoute Connector for Summation. After the upgrade, you must manually remove the old connector and create a new connector with the old configuration details.

Embedded AccuRoute Device Clients

All of the Embedded AccuRoute device clients must be uninstalled and reinstalled after the upgrade. Refer to the AccuRoute v4.0 documentation home page for detailed device client installation instructions for the following clients:

- HP OXPd v1.4
- HP OXPd v1.6
- Ricoh ESA v1.4
- Xerox EIP v1.2

Backing up Cost Recovery custom configurations

If you are upgrading your server and have Cost Recovery installed, you will need to uninstall and reinstall the Cost Recovery client. However, when you uninstall Cost Recovery, you loose all previous custom configurations. To keep these configurations and use them in the new Cost Recovery client, backup of the following files:

- CostRecovery.txt
- LFAccounting.ini
- LFCostRecovery.ini
- LFCostRecoveryU.ini

Additionally, if you want to keep previous data and if the file is not set to overwrite the previous record you should keep the cr.txt file.

Section 3: Applying the Upgrade

This section includes:

For information on how to upgrade AccuRoute Servers that are part of a cluster, see Upgrading AccuRoute Servers in a Cluster (A-1).

Downloading the server upgrade kit

1   Go to http://www.omtool.com/support.

2   Log in using your customer number.

3   Locate the module in the **Downloads & Docs** section.

4   Download the module and save it to a local drive.

5   Extract the files to a location on your AccuRoute Server.

Upgrading the AccuRoute Server

Important	The upgrade installs with a 30-day trial license. This license is watermarked and may not enable all of the functionality currently being used. Please contact Omtool support and sales to obtain permanent licensing for the purchased environment.

1   Close all applications on the server.

2   Navigate to the directory where you saved the download.

3   Run `setup.exe`.

Note If you do not have an internet connection, you will see the following message:
`Failed to determine the latest version of the Prerequisite checking package`
`-2147012889: The server name could not be resolved.`
Click **OK** to continue with the upgrade.

The InstallShield Wizard configures your system, detects a prior version of the server and the **Welcome** page appears.
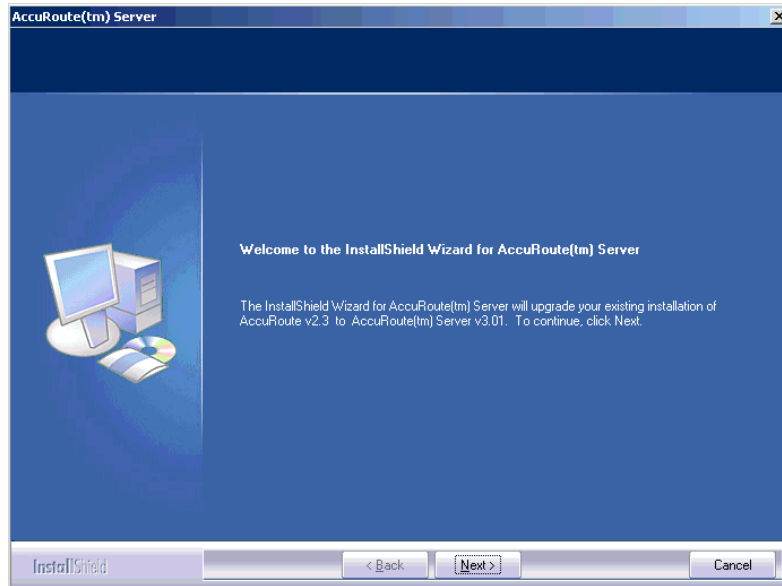
Note During the installation, if a dialog box indicates that a running application needs to be closed before you proceed, close the running applications. Click **Retry** and proceed with the installation.

4 Click **Next**. The Command Prompt window may appear temporarily as the setup program stops the Omtool Address Book Manager service. The **License Agreement** page appears.
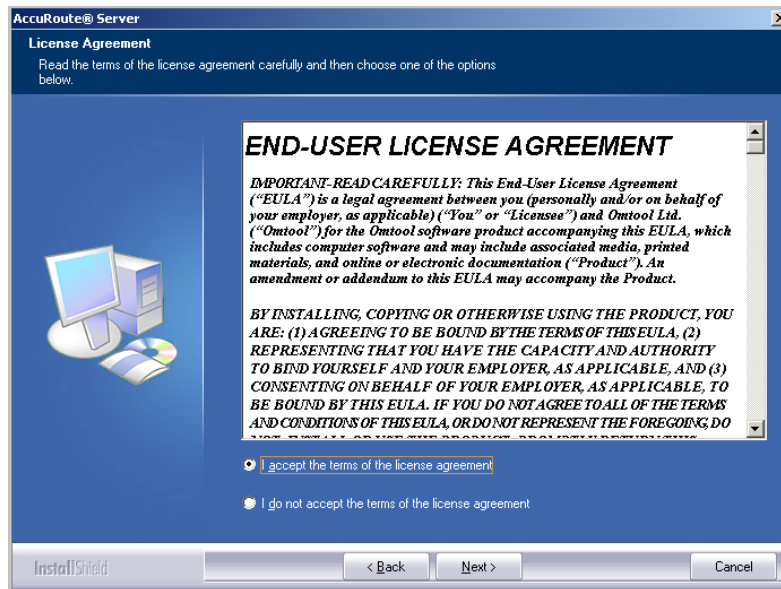
5 Read the license agreement and click the button beside the **I accept the terms of the license agreement** option. Click **Next**.

The setup checks the system for installation requirements and displays the results.
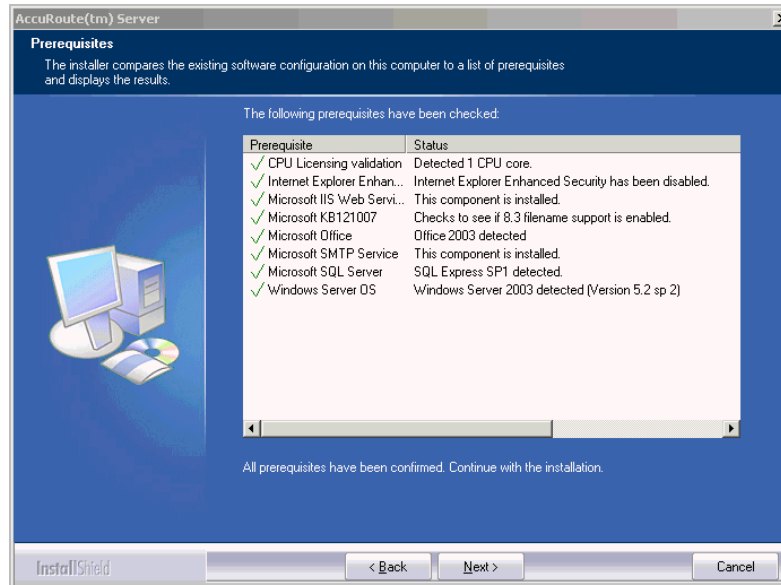
6 Review the results and click **Next**.

The setup requests logon credentials for the Omtool service account.
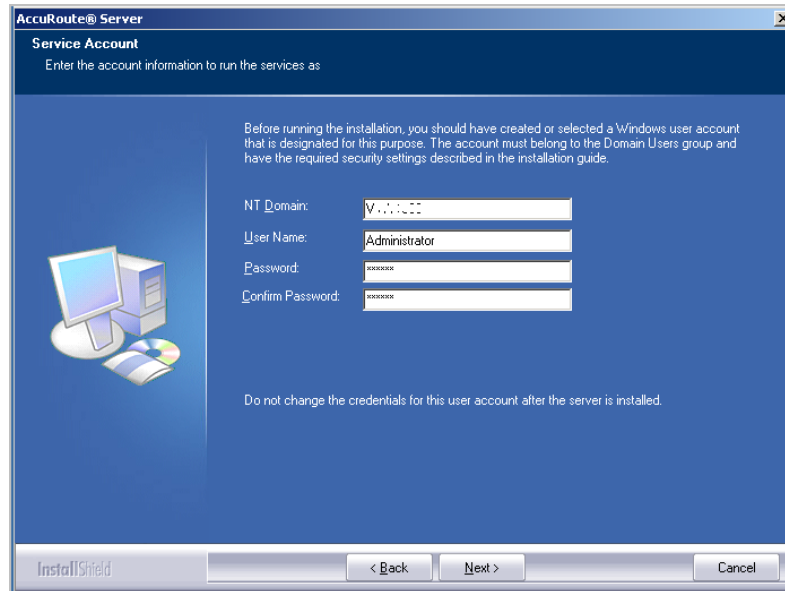
7 Provide the logon credentials of the Omtool service account:

- ‣ In the **NT Domain** text box, enter the domain name.

- ‣ In the **User Name** text box, enter the user name.

- ‣ In the **Password** and **Confirm Password** text boxes, enter the password for the user.

8 Click **Next**.

The **Ready to Install** page opens listing all the installation settings.
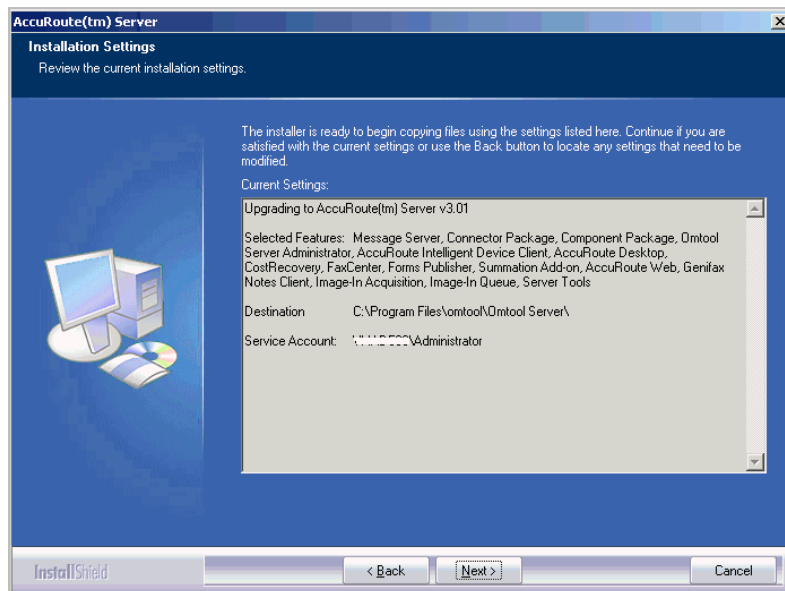
9 Review the installation settings. Click **Next** to begin the server upgrade.

The InstallShield Wizard upgrades the server. When the upgrade is complete, the **InstallShield Wizard Complete** page appears.
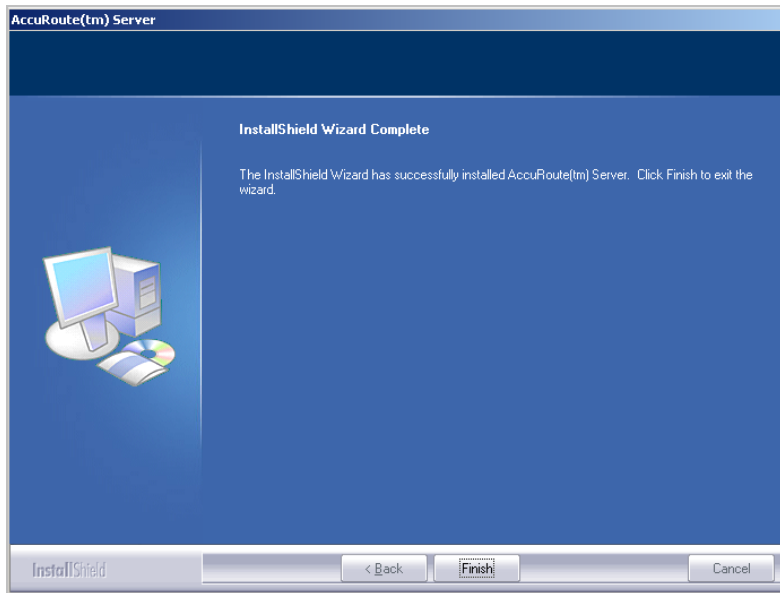
10 Click **Finish** to close the InstallShield wizard.

The **Server Configuration Wizard** launches and the **Welcome** page appears.
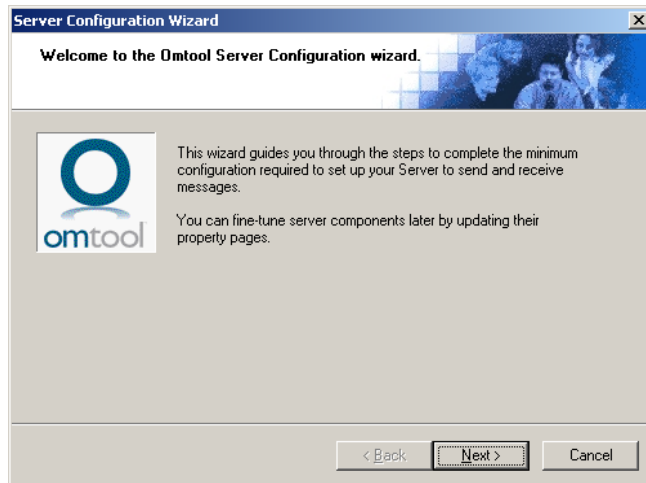
11 Click **Next**. You are prompted to save the changes you made to the server configuration.
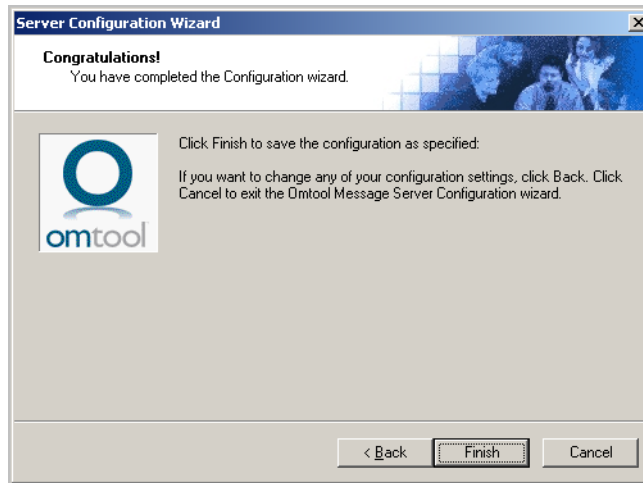
12 Click **Finish**.

The **Server Configuration Wizard** saves your changes to the server configuration. The **Omtool Server Administrator** starts automatically.

13 Check the version of the server. The version should be v4.0.

Entering a license for the AccuRoute server

> **Note**   The AccuRoute server requires a license. For more information, contact Omtool Sales.

You can activate the AccuRoute server license in one of two ways:

- Automatically when you enter an activation code and the AccuRoute server is on a system that has access to the internet.
- Manually if the AccuRoute 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 AccuRoute server has access to the internet. Have available a copy of the activation code.

1 Click **Start > All Programs > Omtool > AccuRoute Server > 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 AccuRoute server may not have access to the internet, to complete this procedure you will need a system that does have access.

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1 Click **Start > All Programs > Omtool > AccuRoute Server > 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:	
	◉ Activate License ○ Deactitvate License
Exported Activation File:	Browse...
	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.
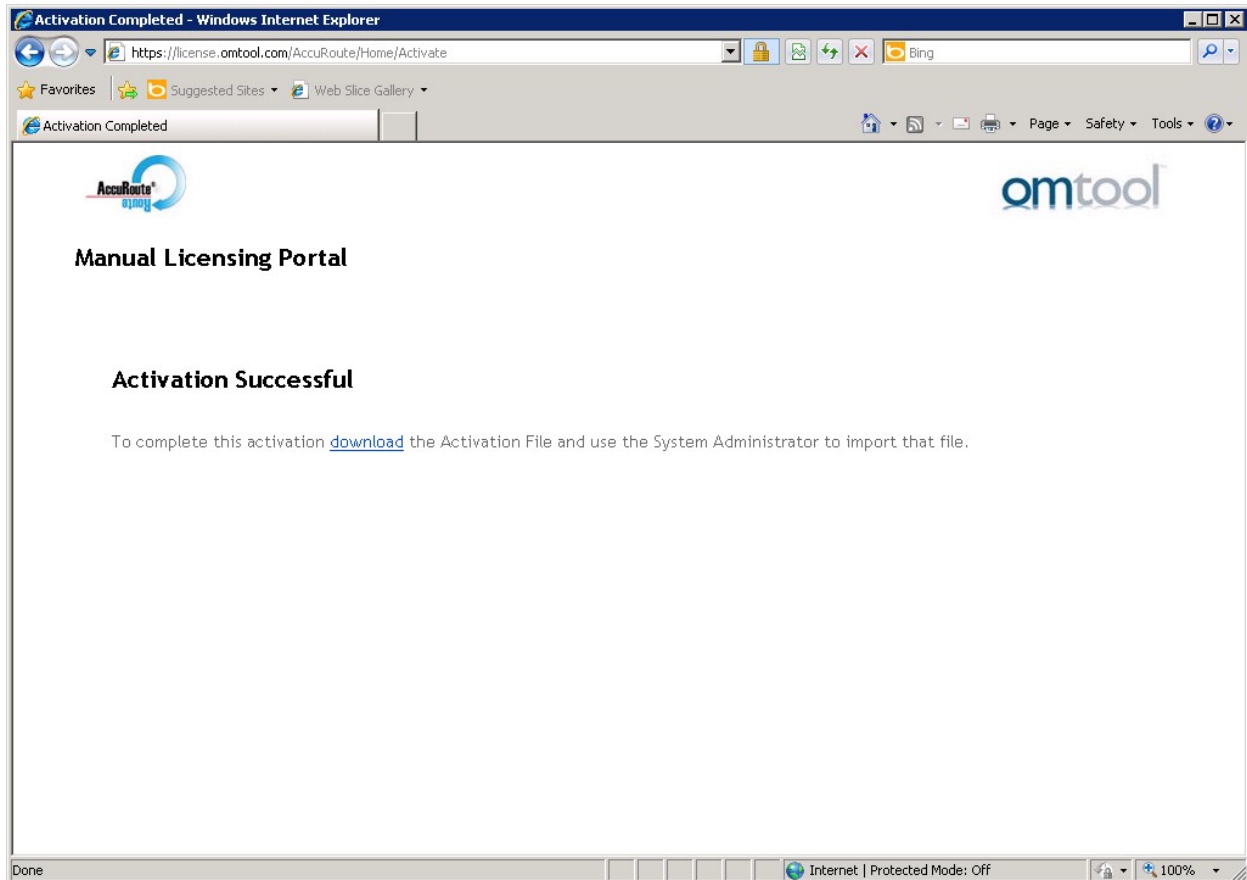
13 To complete the activation, click **Download**. The **File Download** page is displayed.

14 Click **Save** to create the Import file. By default, the file is named with the activation code. You can change this (for example, `ManaulActivation.imp`) and select a location for the file on the AccuRoute 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 `ManaulActivation.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.

Upgrading Remote Administrators, Composers, AccuRoute Connectors for DMS Libraries, Embedded Directive Managers and Modem Servers

Before you upgrade your Remote Administrator, Composer, AccuRoute Connector for DMS Libraries, Embedded Directive Manager or Modem Server, configure the appropriate Distributed COM permissions for the service account on the system where the remote component is installed. For instructions, see Assigning distributed COM permissions (2-5).

To upgrade Remote Administrators, Components, Connectors or Modem Servers:

1   Log in to the system where you are performing the upgrade.

2   Open Windows Explorer and navigate to the folder where you saved the upgrade download.

> **Note**   The folder where you saved the download must be shared so that the setup files are accessible from remote systems.

3   Run **setup.exe**. The **Welcome** message appears in the InstallShield wizard.

4   Click **Next**. The **License Agreement** page opens.

5   Read the license agreement and click the button beside the **I accept the terms of the license agreement** option. Click **Next**. The **Omtool Server User** page opens.

6   Enter the following information:

‣   In the **NT Domain** text box, enter the domain name.

‣   In the **User Name** text box, enter the user name.

‣   In the **Password** and **Confirm Password** text boxes, enter the password.

> **Note**   The login credentials you specify here must be same as those used on the AccuRoute Server from where the components are called.

7   Click **Next**. The **Installation Settings** page opens.

8   Review the installation settings. Click **Next** to begin remote component upgrade.

The InstallShield Wizard upgrades the remote component. When the upgrade is complete, the **InstallShield Wizard Complete** screen appears.

9   Click **Finish**.

10   Restart your computer.

> *Important*   If you upgraded a Remote Administrator, proceed to Connecting a Remote Administrator to the server.

Connecting a Remote Administrator to the server

The Administrator supports any combination of AccuRoute Servers.

To launch the Administrator and connect to a server:

1 Click **Start > All Programs > Omtool > Omtool Server Administrator**. The **Specify Omtool Message Server** page opens.

2 Enter the name or IP address of the AccuRoute Server in the **Network Address** text box.

3 Click **Finish**. The **Omtool Server Administrator** starts.

Important   If you have more than one server in your environment, type the name of any server in the **Network Address** text box—you can connect to additional servers once the Administrator starts.

If you want to connect to another server:

1 Right-click the **Omtool Server Administrator** in the console tree. Select **Connect**. The **Specify Omtool Message Server** page opens.

2 Enter the name or IP address of the AccuRoute Server in the **Network Address** text box.

3 Click **Finish**.

The server appears in the console tree under **Omtool Server Administrator**.

Configuring the client install directory share

After you finish upgrading the AccuRoute Server, you must configure the **Clients** folder within the **Omtool** directory located in the **Program Files** folder. This is necessary because the systems on which you will remotely install the AccuRoute Desktop and other clients must have access to this folder containing the setup files.

Note   If you had a shared folder prior to the upgrade, share permissions for everyone except for the user account used are lost during the upgrade. To configure share permissions for everyone and not just the user account used during the upgrade, complete the procedure below.

To configure sharing:

1 Navigate to the `\Omtool\Omtool Server\Clients` directory on the drive where you previously installed the AccuRoute Server.

2 Right-click **Clients** and select **Sharing and Security** from the drop-down menu.

3 Select the **Share this folder** option.

4 Select **Permissions** and verify that user **Everyone** is listed with read access.

5 Click **OK** then **Apply** to save your changes.

Section 4: Required Tasks after Upgrading

This section includes:

Copying templates to the server

Before running the server upgrade, you made a backup copy of the `Templates` and `EmbeddedDirectives` directories. See Backing up the templates (2-4) for more information.

Now copy these directories to the following locations on the AccuRoute Server:

- Copy Notifications (body and subjects) to:

  `\Omtool\Omtool Server\Languages\ENU\Notifications`

- Copy CoverPages to:

  `\Omtool Server\Languages\ENU\Coverpages`

- Copy Distribution Routing Sheet templates to:

  `\Omtool Server\Languages\ENU\EmbeddedDirectives`

Resending cancelled messages

Before running the server upgrade, you cancelled all messages in the **In Process** folder. For more information, see Cancelling messages in the In Process Queue (2-5).

Resend the messages you cancelled using the procedure below.

1   Start the Omtool Server Administrator.

2   Expand **Messages** in the console tree. Click **History**.

3   Click the radio button below the **Cancelled** barometer.

4   Go to the details pane and select **All Items in the View** menu.

5   Select all items in the list, right-click and select **Resend**.

6   Click **OK** to resend these messages.

Providing a logon account for the cleanup task

Before running the server upgrade, you disabled the cleanup task so that it could not run during the server upgrade. For more information, see Disabling the cleanup task (2-4).

Re-enable the cleanup function by providing the login credentials for the task. Because the cleanup task modifies the AccuRoute database, it requires the same login credentials as the server account.

1   Start the Omtool Server Administrator.

2   Click and expand **Components** in the console tree.

3   Double-click **Maintenance** in the details pane.

4   Click **Advanced**. The **Maintenance Advanced Properties** page opens.

5   Click **Schedule**. The **Enter Account Information** page opens.

6   In the **Username** textbox, enter the user name. In the **Password** and **Confirm password** text boxes, enter the password.

7   Click **OK**, **OK** and **OK** to save your changes.

Other configurations

After upgrading to AccuRoute v4.0, you must configure the connectors and components in your environment as necessary. For example, if you are using a remote Modem Server, you must re-detect Telco channels after the upgrade. Depending on your environment and needs, you may need to perform all or none of the configurations listed below.

Important	Be sure to review and note current configurations before proceeding with the upgrade process.

Enabling Notes after the upgrade

If you are using AccuRoute Connector for IBM® Lotus® Notes in your environment, all communication to and from the AccuRoute server is directed through the AccuRoute Connector for SMTP.

Modifying AccuRoute Server configuration after upgrade

After you upgrade your legacy AccuRoute Server, if you modify the server configuration, your actions will not remove the associated program files nor does it stop and remove associated services. For example, if you uninstall the Modem Server after an upgrade, it does not remove associated program files or stop/remove modem services. They will remain until a complete uninstallation is done.

Reconfiguring AccuRoute Connector for LexisNexis Concordance

If you are using AccuRoute Connector for LexisNexis Concordance in your environment, you must reconfigure the connector after upgrading and adding the permanent license for the Litigation Support connector. The AccuRoute Connector for LexisNexis Concordance contains a different configuration and implementation, requiring the connector to be reconfigured.

Note the configuration details before the upgrade and use that data to reconfigure the connector. See Reviewing configuration data for the AccuRoute Connector for LexisNexis® Concordance® (2-7) for details.

Reconfiguring conversion engine selection

> **Note**   Because modified conversion engine selections are lost during the upgrade, it is recommended that you review your current conversion engine selections and note the criteria you used to create them before upgrading to AccuRoute v4.0.

Modified conversion engine selections are not retained during the upgrade process. After upgrading from a legacy AccuRoute Server system to AccuRoute v4.0, reconfigure the conversion engines selected for particular file types.

For example, you may have previously selected Word Automation as the conversion engine for DOC files. The post-upgrade conversion engine for DOC files is changed to Aspose (Aspose). Therefore, you may need to reconfigure the default compose engines. For information on how to configure a conversion engine for file types, consult the Omtool Server Administrator help.

Redetecting Telco channels

> **Note**   Because all channel configurations are lost during the upgrade, it is recommended that you review your current channel configurations and note the criteria you used to create them before upgrading to AccuRoute v4.0.

All channel configurations are lost during the upgrade process. After upgrading from a legacy AccuRoute Server system to AccuRoute v4.0, redetect the Telco channels in order to reconfigure them. For information on how to detect channels, consult the Omtool Server Administrator help.

Section 4: Required Tasks after Upgrading

Section 5: Additional Configuration

This section includes:

Updating Fax board drivers (for servers with fax capability)

The upgrade supports all new fax board drivers/modules for all supported fax boards including Dialogic Brooktrout Technology SR140, TR1034 series, and TruFax RoHS series.

> **Note**   It is recommended that you update the drivers for your fax boards.
> If an Omtool Technical Support representative instructs you to update your drivers, use the procedures in this section to remove the drivers and then install new drivers.

> *Important*   Non-RoHS TruFax boards are not supported in AccuRoute v3.01 or AccuRoute v4.0.

Downloading latest Dialogic Brooktrout drivers

To download Dialogic Brooktrout v6.5.0 x64 drivers:

1   Go to http://www.omtool.com/support and log in using your customer number.

2   In the navigation pane on the left, click **Support > Downloads and Docs**.

3   Open the **AccuRoute** menu, go to **Drivers** section. Locate the download.

4   Click the download link to begin the download.

   The zip file containing the `.msi` file and the Release Notes opens.

5   Select the files and click **Extract**. Browse to the location where you want to save the file.

6   Click **Extract**. The files are extracted and saved to the location you specified.

7   Name this directory the `Boston` directory.

Installing Dialogic Brooktrout v6.5.0 x64 drivers

1   Locate the `Boston` directory.

2   Double-click `Brooktrout 6.5.0_x64.msi`. The **Welcome** page opens.

3   Click **Next**. The **License Agreement** page opens.

4   Read the license agreement and select the **I accept the terms in the license agreement** option.

5   Click **Next**. The **Destination Folder** page opens.

6   Modify the destination location if necessary and click **Next**.

7   Click **Next** to begin the installation.

8   When installation is complete, you the **InstallShield Wizard Completed** page opens.

9   Click **Finish**. The Readme opens.

Activating the License

Note   If you already have a working license, this step is not necessary.

Also note, the following procedure is applicable for SR140 modules only.

To activate the license:

1   Click **Start >Program Files > Brooktrout License Manager**.

The **BrookTrout License Manager** opens.

2   In the menu bar, click **License >Activate License**. The **License Activation** wizard opens and the **Welcome** message appears.

3   Click **Next**. Select **Using the interactive web method**.

4   Click **Next**. You get the **Node Lock** value.

5   Click **Save the instructions into a file** option.

6   Click **Next**.

7   Browse and save the file to a known location.

8   Go to the location where you saved the file. Open the file.

The file contains text similar to that shown below and provides the Node Lock value of your system:

```
To request a license, please visit our website:

http://www.dialogic.com/activation

and follow the instructions provided on the website.

Dialogic will email the license to you immediately.


When prompted, supply the following information:
```

> `Node Lock: [Node Lock value]`

9 Open Internet Explorer and go to http://www.dialogic.com/activation.

10 In the **License Key** text box, enter the License key and the Node Lock value of your system.

Important　　　For the license key, contact Dialogic customer support.

Dialogic sends you the license for your BrookTrout SR140 module.

Note　　This license key enables the Dialogic Brooktrout SR140 fax feature on the system from which the node value was retrieved. It cannot be transferred without assistance from Dialogic.

---

11 Save the license file to the local drive of the system.

Applying the license

Note　　The following procedure is applicable for SR140 modules only.

To apply the license:

1 Launch the **Brooktrout License Manager**.

2 Select **File > License**.

3 Select **Install License** from the drop-down menu.

4 Browse to the license file you saved on the system.

Configuring Dialogic Brooktrout SR140

For configuration instructions, see section 4 of the Modem Driver Installation and Configuration Guide.

Section 6: Upgrading Client Applications

This section includes:

All client installation setup files are located in the `Clients` directory of the AccuRoute Server. Before rolling out the client upgrade, you can share this `Clients` directory so that it is easily accessible from remote systems where the clients are installed. For instructions on how to share the `Clients` directory containing the setup files, see Configuring the client install directory share (3-11).

AccuRoute Desktop Client requirements

The system where you install/upgrade the AccuRoute Desktop client must meet the following requirements:

- ❐ Pentium®-class processor
- ❐ Windows 2008/2003 SP2/ XP Professional/Windows 7
- ❐ 20 MB hard disk space
- ❐ 64 MB RAM (128 recommended)
- ❐ Acrobat® Reader® 7.x (minimum)

Supported e-mail applications

- ❐ Microsoft® Outlook® 2007 (Outlook Express not supported)
- ❐ Notes 6.5/6.0/5.0
- ❐ Novell GroupWise 6.0/5.5

When the client is configured to integrate with an address book for a supported e-mail application, the e-mail application must be selected as the Windows default e-mail application. For more information, consult Windows help.

AccuRoute Web Client

When you upgrade your AccuRoute Server, upgrade all instances of the AccuRoute Web Client in your environment. For more information, consult the AccuRoute Web Client Installation Guide and the Web Client User Guide.

Note about Omtool Web Client

Omtool Web Client was deprecated in AccuRoute v2.3. It was replaced by AccuRoute Web Client v2.0. Omtool recommends that when you upgrade to AccuRoute Server v4.0, you install and configure the AccuRoute Web Client v4.0.

Important	If you have a prior version of the Omtool Web Client, do not uninstall or remove the deprecated Omtool Web Client application and set up files in your system, as deleting those files may interfere with the server usage.

Note	You cannot configure the AccuRoute Server to use both the deprecated Omtool Web Client and the new AccuRoute Web Client at the same time.

To upgrade the AccuRoute Web Client, refer to the AccuRoute v4.0 documentation home page to access upgrade instructions.

Cost Recovery client

When you upgrade your AccuRoute Server, upgrade all instances of the CostRecovery client in your environment. For more information on the CostRecovery application, consult the CostRecovery Administrator Guide.

To upgrade CostRecovery:

1   Click **Start > Control Panel > Add/Remove Programs**. Remove the existing version of CostRecovery from the system.

2   Open Windows Explorer and navigate to `\\Servername\Clients\CostRecovery`.

   where `Clients` is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.

3   Run `setup.exe`.

   The InstallShield Wizard configures the system for the CostRecovery client and the **Welcome** message appears.

4   Click **Next**. The **License Agreement** page opens.

5   Read the license agreement. Click **Yes**. The **Choose Destination Location** page opens.

6   Click **Next** to accept the default destination location. Alternately, to install the application in a different location, click **Browse**. Navigate to the desired directory. Click **OK** and then **Next**.

   The **Genifax Server** page opens.

7   In the **Genifax Server** text box, enter the name or the IP address of the system running the AccuRoute Server.

8   Click **Next**. The **Start Copying Files** page opens.

9   Review the installation settings. Click **Next** to install the CostRecovery client.

10 When the installation is complete, the InstallShield Wizard **Complete** page opens.

11 Click **Finish**.

Important   Recreate the export template file before running CostRecovery. Additionally, enable the **Billing** component on the AccuRoute Server and configure it to collect the information you need. For more information, refer to the Administrator help.

You can recreate older custom configurations in the new Cost Recovery client using the backup files. For more information, see Backing up Cost Recovery custom configurations (2-8).

---

12 Check the version of the client to make sure that the upgrade was successful. The version should be v3.2.0.1014.

FaxCenter client

When you upgrade your AccuRoute Server, upgrade all instances of the FaxCenter client in your environment. For more information on the FaxCenter application, consult the FaxCenter Online Help.

To upgrade FaxCenter:

1   Click **Start > Control Panel > Add/Remove Programs**. Remove the existing version of FaxCenter from the system.

2   Open Windows Explorer and navigate to `\\Servername\Clients\FaxCenter`.

where `Clients` is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.

3   Run `setup.exe`.

The InstallShield Wizard configures the system for the FaxCenter client and the **Welcome** message appears.

4   Click **Next**. The **License Agreement** page opens.

5   Read the license agreement. Click **Yes**. The **Choose Destination Location** page opens.

6   Click **Next** to accept the default destination location. Alternately, to install the application in a different location, click **Browse**. Navigate to the desired directory. Click **OK** and then **Next**.

The **Start Copying Files** page opens.

7   Review the installation settings. Click **Next** to install the FaxCenter client.

8   When installation is complete, the InstallShield Wizard **Complete** page opens.

9   Click **Finish**.

10 Check the version of the client to make sure that the upgrade was successful. The version should be v3.6.

AccuRoute Desktop client

The following version of the AccuRoute Desktop is qualified with AccuRoute v4.0.

- AccuRoute Desktop v4.0 (ships with AccuRoute v4.0)

> **Note** While the legacy AccuRoute Desktops are supported, Omtool recommends that you upgrade to the latest version of AccuRoute Desktop client to take advantage of the latest features. AccuRoute Desktop clients prior to v3.01 are not supported.

For more information on the AccuRoute Desktop client, consult the [Install Guide](#) and the [User Guide](#).

To upgrade the AccuRoute Desktop client:

1 Log in to the system where you have the client using an account that belongs to the local Administrators group.

2 Open Windows Explorer and navigate to `\\Servername\Clients\AccuRouteDesktop`.

where `Clients` is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.

3 Run `setup.exe`.

The InstallShield Wizard configures the system and the **Welcome** message appears.

4 Click **Next**. The **License Agreement** page opens.

5 Read the license agreement. Select the **I accept the terms in the license agreement** option and click **Next**.

The **Destination Folder** page opens.

6 Click **Next** to accept the default destination location. Alternately, to install the application in a different location, click **Browse**. Navigate to the desired directory. Click **OK** and then **Next**.

The **Ready to Install** page opens.

7 Click **Install** to begin the installation.

When installation is complete, the InstallShield Wizard **Complete** page opens.

8 Click **Finish**.

9 Check the version of the client to make sure that the upgrade was successful. The version should be v4.0.

Image-In Queue client

When you upgrade your AccuRoute Server, upgrade all instances of the Image-In Queue client in your environment. For more information on the Image-In Queue client, consult the [Install Guide](#) and the [User Guide](#).

To upgrade the Image-In Queue client:

1 Log in to the system where you have the client using an account that belongs to the local Administrators group.

2 Open Windows Explorer and navigate to `\\Servername\Clients\Image-In Queue.`

where `Clients` is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.

3 Run `setup.exe`.

The InstallShield Wizard configures the system and the **Welcome** message appears.

4 Click **Next**. The setup shows the license agreement.

5 Read the agreement carefully and if you agree to the terms, click **Yes**.

The **Choose Destination Folder** page opens. The default destination is `C:\Program Files\Omtool\Image-In Queue`.

6 Click **Next** to select the default destination. The **Start Copying Files** page lists installation details you have supplied. If you want to install in a non-default location, click **Browse**, select the location and then click **Next**.

7 Click **Next** to begin the installation. When the installation is complete, the InstallShield Wizard **Complete** message appears.

8 Click **Finish** to close the wizard.

9 Check the version of the client to make sure that the upgrade was successful. The version should be v4.0.

Section 6: Upgrading Client Applications

Section 7: Troubleshooting

This section includes:

Preview and Approval links from AccuRoute Web Client v1.0 become unusable after upgrading

Problem:

I upgraded from AccuRoute Web Client v1.0 to v2.0 (or later version). Approval and Preview links from v1.0 are now unusable.

Solution:

After you upgrade from an older Web Client (AccuRoute Web Client v1.0), the older web client is uninstalled. As a result, there is no control on the process of redirection. Use the sample ASP file below to redirect the old Web Client requests to new Web Client location.

> **Note**   For this workaround to be effective, verify the job id is the same in the old AccuRoute Server and the upgraded new AccuRoute Server. If the old url has jobid=40 and new url has jobid=65 after the upgrade, this workaround will not work.

To redirect links:

1   Create a virtual directory in IIS with old web client name which is **omtool**.

   For instructions on how to create a virtual directory in IIS, see
   http://support.microsoft.com/kb/172138.

2   If old web client name was **GenifaxWeb** then create the virtual directory with that name.

3   Place the ASP file inside that virtual directory.

> **Note**   By default the new web client virtual directory name is "OmtoolArWeb", if it is something different then edit the code below to change it (`sDestinationVirtualDirectory`).

This assumes the new and old web client are on same server, if not change the server name. This page will redirect old web client "approval" & "review" requests to new web client.

ASP file

```
<%@ Language=VBScript %>

<%

' What this page does
```

```
'
' This page allows the user to redirect the request from Old web client to New
web client
'
' How to install and use it
'
' 1) Create a virtual directory on IIS with old web client name which is "omtool"
' 2) If old web client name was "GenifaxWeb" then create the virtual directory
with that name
' 3) Place this file inside that virtual directory
' 4) By default the new web client virtual directory name is "OmtoolArWeb", if
it is something
'    different then edit the code below to change it
(sDestinationVirtualDirectory)
' 5) This assumes the new and old web client are on same server, if not change
the (sServerName)
' 6) This page will redirect old web client "approval" & "review" requests to
new web client.


dim sUrl

dim sDestinationUrl

dim sServerName

dim sDestinationVirtualDirectory


sServerName = Request.ServerVariables("SERVER_NAME")

sDestinationVirtualDirectory = "OmtoolArWeb"

sDestinationUrl = "http://" & sServerName & "/" & sDestinationVirtualDirectory
& "/omreviewfax.aspx"


sUrl = Request.ServerVariables("QUERY_STRING")


Response.Redirect sDestinationUrl & "?" & sUrl


%>
```

Appendix: Upgrading AccuRoute Servers in a Cluster

When upgrading AccuRoute Servers that are part of a server cluster, follow the instructions in this section.
This section includes:

Upgrading an AccuRoute Server cluster

1   Verify that there are no messages in the In Process queue. If there are, you must cancel the messages using the instructions in Cancelling messages in the In Process Queue (2-5). You can resend the messages after the upgrade is complete.

2   Shutdown the secondary server of the cluster.

3   Upgrade the primary server using instructions in Upgrading the AccuRoute Server (3-1).

4   Shutdown the primary server.

5   Start the secondary server of the cluster.

6   Upgrade the secondary servers of the cluster using instructions in Upgrading the AccuRoute Server (3-1).

|	
Important	At the end of the upgrade on the secondary server, when the Server configuration wizard appears, you must cancel out of it. For instructions, see Cancelling out of the server configuration wizard when upgrading the secondary server (A-2).
	If you see the error message "Failed to connect to the server ....", troubleshoot the situation using the instructions in Error after upgrading the secondary server (A-2).

7   Start the primary server.

Cancelling out of the server configuration wizard when upgrading the secondary server

1   Click **Cancel** in the Server Configuration Wizard **Welcome** page.
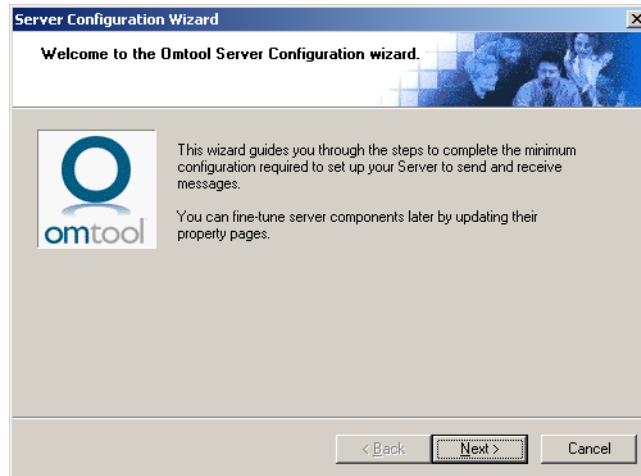
2   You are prompted to confirm that you want to cancel out of the configuration.
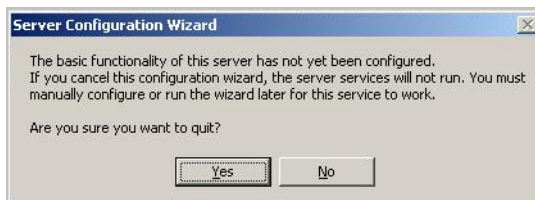
3   Click **Yes**. The following dialog opens asking if you want to configure the system the next time you start the Administrator.

4   Click **No**.

Error after upgrading the secondary server

After you upgrade the secondary server, if the server configuration wizard fails to open and you see the error message: "Failed to connect to server. The service cannot be started, either because it is disabled or because it has no enabled devices associated with it"

follow the steps below to restart the services and complete the cluster upgrade.

1   In the message "Failed to connect to ...", click **OK**.

In the **Specify Omtool Message Server** dialog, the server name is pre-populated with the name of the secondary server you upgraded.

2   Click **Finish**. The message "Failed to connect to ..." appears again.

3 Repeat steps 1 and 2.

All services are started and the cluster upgrade is successful.

Using AccuRoute Connector for Lotus Notes in a cluster

If you are using the AccuRoute Connector for Lotus Notes in a cluster environment, all communication between the Lotus Notes server and the AccuRoute server is directed through the AccuRoute Connector for SMTP.

Appendix: Upgrading AccuRoute Servers in a Cluster