
AccuRoute® Web Client v2.0 installation and configuration guide

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Section I: Introduction

This section includes:

[Introduction to AccuRoute Web Client](#) (I-1)

[About this guide](#) (I-2)

[Related documentation](#) (I-2)

Introduction to AccuRoute Web Client

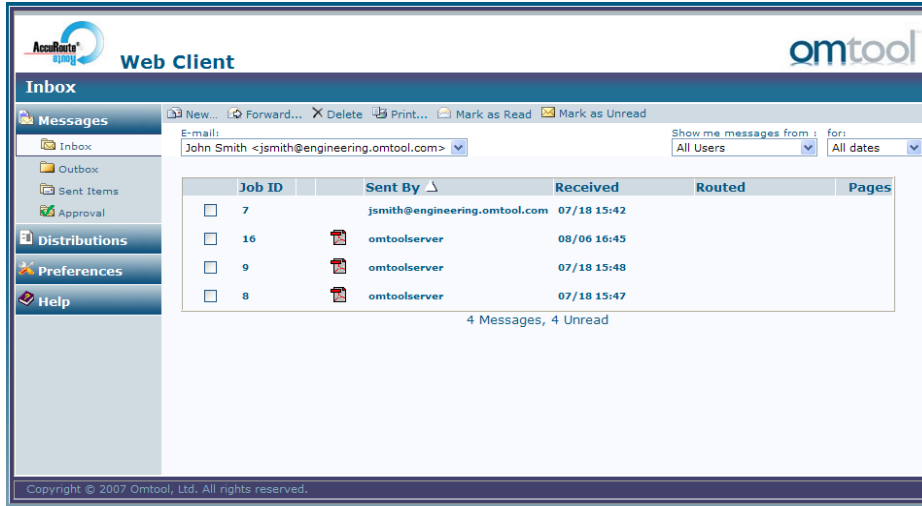
AccuRoute Web Client is an intranet-based web application providing network users a convenient method of creating document distributions (Embedded Directives), generating Routing Sheets, and sending messages.

Using AccuRoute Web Client, users can send / distribute documents either electronically as an email message or a fax message. They can also scan a hard copy document and distribute it using AccuRoute's routing capabilities.

- To distribute a document electronically, simply create the message and click **SEND** (or select an existing message and click **FORWARD/RESEND**) just as you would send an email message. The AccuRoute Web Client immediately distributes the document as an electronic file attachment using the document distribution information.
- To distribute a hard copy document, generate a Routing Sheet from a document distribution. (A Routing Sheet is a cover sheet for your message containing the document distribution information (Embedded Directive data). Take the Routing Sheet and your hard copy documents to an office machine and scan it. Your company's intelligent AccuRoute software detects the Embedded Directive, routes the document to the AccuRoute sever where it is processed and sent to the intended recipient.

Section I: Introduction

In the main menu, AccuRoute Web Client presents the user with several options to create Messages, document Distributions and set preferences.



The default view of AccuRoute Web Client presents the user with a series of options.

Note AccuRoute Web Client is not cluster aware.

About this guide

This guide provides instructions on installing AccuRoute Web Client. It is written for an advanced computer user or network administrator with knowledge of the Windows Server operating system and the LAN.

Related documentation

For instructions on how to use the AccuRoute Web Client, consult the [AccuRoute Web Client help](#). For all other documentation relevant for AccuRoute v2.3, consult the [AccuRoute v2.3 documentation home page](#).

Section 2: Requirements

This section includes:

[Hardware and software requirements](#) (2-1)

[Client requirements](#) (2-2)

[User requirements](#) (2-2)

Hardware and software requirements

Hardware and software requirements AccuRoute Web Client are as follows:

- System should be a Windows NT domain computer that always runs in the same domain as the AccuRoute server and is not a domain controller

Note AccuRoute Web Client is usually installed on the system running the AccuRoute server or on another Windows 2003 system which is in the same domain as the AccuRoute server. If you install the AccuRoute Web Client on a system that is not running the AccuRoute server, you must configure DCOM permissions so that the Web Client server can access the AccuRoute server DCOM objects.

- Pentium III-compatible processor; 1 GHz; 512 MB RAM; 100 MB available hard disk space; CD-ROM drive; and Microsoft mouse or compatible pointing device
- Windows 2003 Standard Edition
- IIS (Windows component)

IIS 6.0 or later to allow Active Server Pages. This configuration is located in the Web Service Extensions node in the IIS console tree.

- Microsoft .NET Framework v2.0 redistributable package

To download the package, go to:

<http://www.microsoft.com/downloads/details.aspx?familyid=0856eacb-4362-4b0d-8edd-aab15c5e04f5&displaylang=en>

- World Wide Web Service enabled

Client requirements

The clients necessary to access the AccuRoute Web Client software are as follows:

- Internet Explorer 5.5 or later
- Adobe Reader 5.0 or later, or Adobe Acrobat 5.0 or later.
- Microsoft Outlook client - The AccuRoute Web Client has a **Browse Address book** option for new messages page. This feature is available for Microsoft Outlook clients only.

The AccuRoute Web Client user can choose an email address from the Microsoft Outlook address book only if the Outlook client is installed and configured on the client system.

User requirements

The AccuRoute Web Client users must have an email account created for them using the mail server (either Microsoft Exchange Server or Lotus Notes).

Important The mail server for any email account created must be installed on the same domain where the AccuRoute server is installed.

This is necessary because the AccuRoute Web Client queries the Active Directory attributes like “mail” and “proxyAddresses”. The “proxyAddresses” attribute is added to the Active Directory properties only if an Microsoft Exchange Server or Lotus Notes is installed in the same domain as the Active Directory.

Section 3: Installation

This section includes:

[Introduction to the AccuRoute Web Client setup](#) (3-1)

[Installing AccuRoute Web Client](#) (3-1)

[Required DCOM permissions when installing on a remote system](#) (3-5)

[Uninstalling AccuRoute Web Client](#) (3-5)

Introduction to the AccuRoute Web Client setup

The AccuRoute Web Client setup does all of the following:

- installs the AccuRoute Web Client program files
- creates a virtual directory in IIS and configures IIS authentication
- configures AccuRoute Web Client with the location of the AccuRoute server and the identity and location of the mail system

Installing AccuRoute Web Client

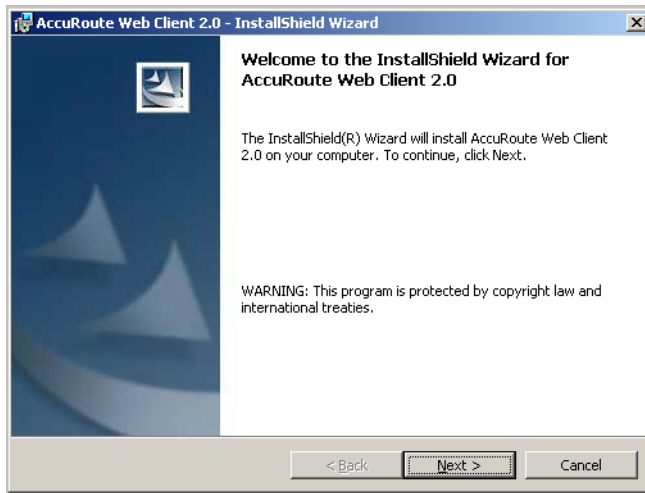
Note If you have used Omtool/AccuRoute/Genifax Web Client before, you must keep the deprecated client application and set up files in your system as deleting those files may interfere with the server usage.

To install AccuRoute Web Client:

- 1 Log on to the system where AccuRoute Web Client is being installed using an account that belongs to the local Administrators group.
- 2 Insert the AccuRoute server installation CD or navigate to a network folder containing the setup files and run **SETUP.EXE**.

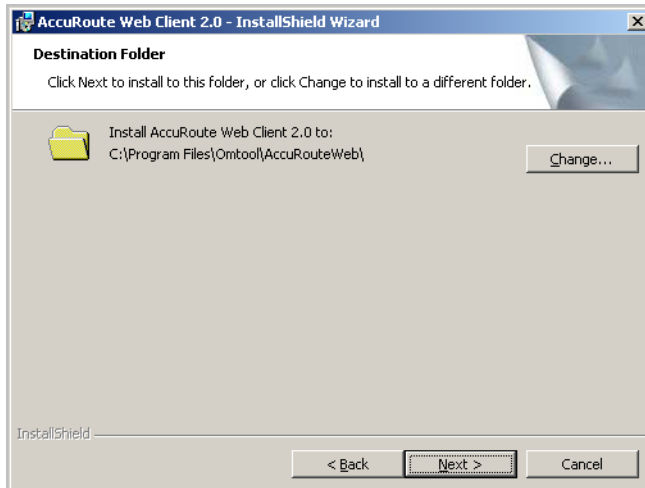
Tip The AccuRoute Web Client setup is installed with a complete AccuRoute server installation in **\Program Files\omtool\OmtoolServer\clients\AccuRouteWeb**. Immediately following the AccuRoute server installation, only the Omtool service account has permissions to access client setup programs on the AccuRoute server, but additional users can be granted permissions if necessary.

The InstallShield wizard configures your system and shows the **Welcome** message.

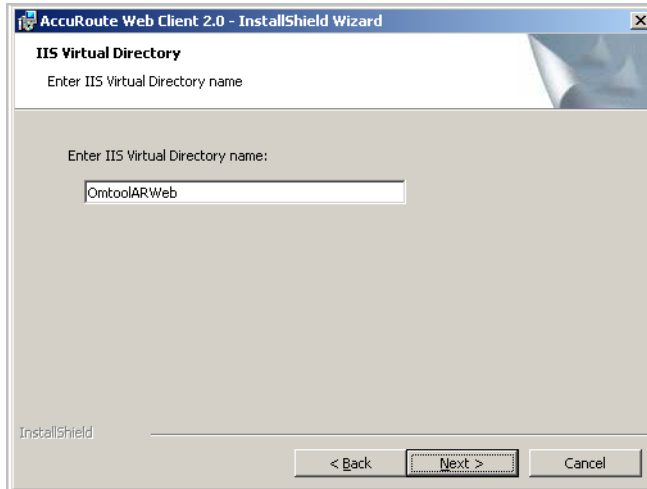


Note If Microsoft .NET Framework v 2.0 is not installed on your system, the AccuRoute Web Client installation kit will direct you to the location from where you can download the package. After you have installed the package, you can proceed with the AccuRoute Web Client installation.

3 Click **NEXT**. The setup shows the destination folder.



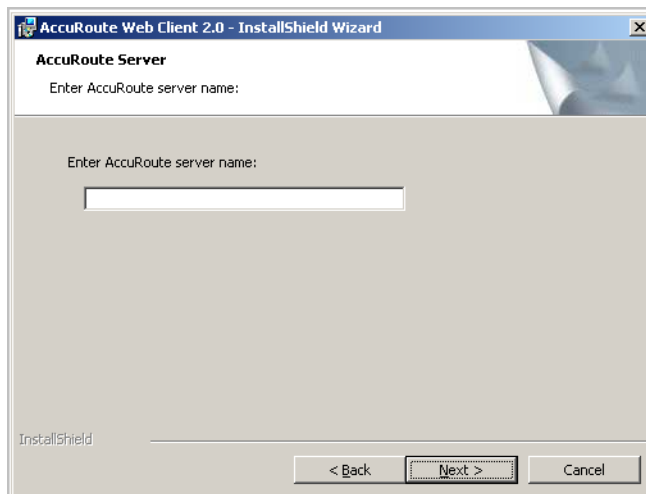
4 Change the destination folder if necessary and click **NEXT**. The setup shows the IIS Virtual Directory Name for AccuRoute Web Client.



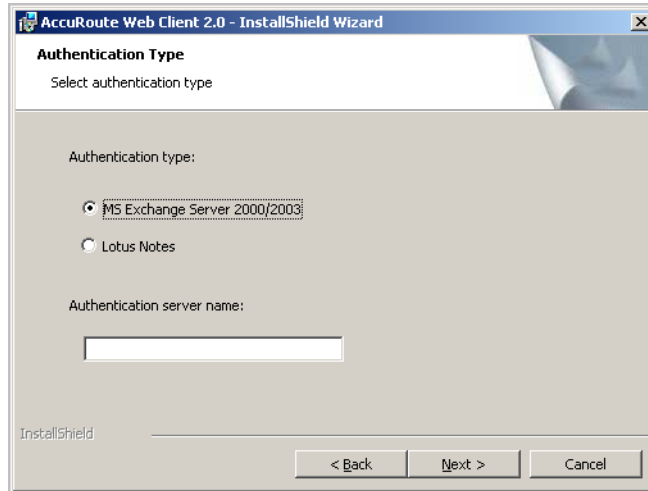
- 5 Change the virtual directory name if necessary. The default is [OmtoolARWeb](#). Click **NEXT**.

Note The virtual directory name is used to create a virtual directory in IIS under Default Web Site.

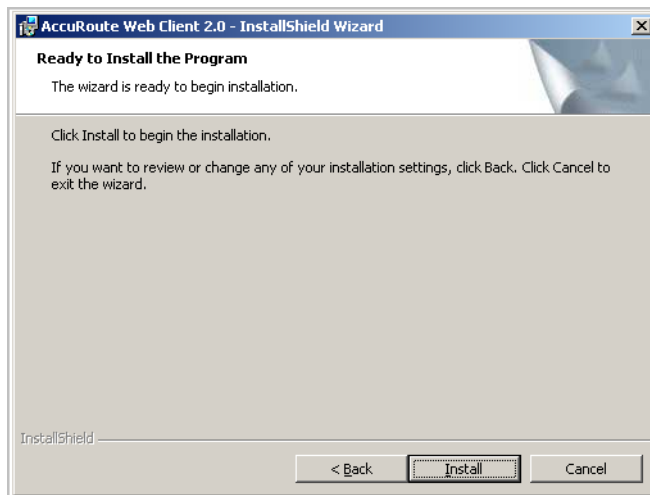
The setup prompts you to enter the AccuRoute server name. If you are installing the client in a system which has the AccuRoute server running, the name is filled in by default.



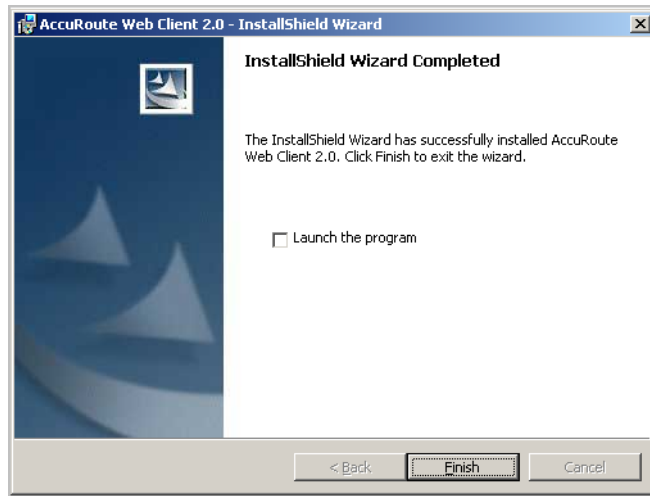
- 6 Click **NEXT**. The setup prompts you to choose the authentication type and enter the authentication server name.



- 7 Choose from Microsoft Exchange Server or Lotus Notes and enter the authentication server name. The authentication server name is the name of the Active Directory server name. It is not the name of the system where the Exchange server or the Lotus Notes server is running.
- 8 Click **NEXT**. The setup shows the **Ready to Install the Program** page.



- 9 Click **NEXT**. The client is installed. When installation is complete, the setup shows the installation complete page.



- 10 To launch the AccuRoute Web Client, check the box beside the **LAUNCH THE PROGRAM** option.
- 11 Click **FINISH** to close the InstallShield wizard.

Required DCOM permissions when installing on a remote system

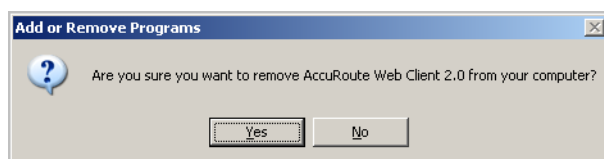
When you install AccuRoute Web Client on a remote system, you must configure the following DCOM permissions on the AccuRoute server. Without this configuration, the AccuRoute server cannot communicate with the remote clients. For DCOM configuration instructions, see [Required COM permissions for launching Remote Web Client \(4-5\)](#).

Uninstalling AccuRoute Web Client

To uninstall AccuRoute Web Client:

- 1 Go to the **CONTROL PANEL** and start **ADD OR REMOVE PROGRAMS**.
- 2 Select **ACCURROUTE WEB CLIENT 2.0** and click **REMOVE**.

You are prompted to confirm that you want to uninstall the software.



3 Click **YES**.

AccuRoute Web Client is uninstalled from your system. A progress indicator shows the status of the uninstallation.

Section 4: Required configuration

This section includes:

- [Enabling Integrated Windows Authentication](#) (4-1)
- [Adding the AccuRoute Web Client URL to the list of trusted sites](#) (4-2)
- [Installing Active X ocx controls](#) (4-3)
- [Adding network printer](#) (4-4)
- [Required COM permissions for launching Remote Web Client](#) (4-5)

Enabling Integrated Windows Authentication

AccuRoute Web Client authenticates users based on their Windows logon credentials. The logon credentials are either passed transparently from the client to the web server or entered manually by the user at the beginning of each session. The login method depends on how authentication is configured; both methods are described in the configuration instructions.

Note Windows authentication is required with NTLM authentication. Skip this section for database authentication or Notes authentication.

Configure Windows authentication on the web server and then configure Internet Explorer on clients.

Configuring the web server

To configure Integrated Windows Authentication on the web server:

- 1 Log on to the web server using an account that belongs to the local Administrators group and start IIS.
- 2 Expand the server running AccuRoute Web Client and expand **DEFAULT WEB SITE**.
- 3 Click the virtual directory for AccuRoute Web Client. (The default name is **OmtoolARWeb**.) The AccuRoute Web Client program files appear in the details pane.
- 4 Right-click **OMTOOLARWEB** in the details pane and select **PROPERTIES**.
- 5 Go to the **DIRECTORY SECURITY** tab.
- 6 Go to **AUTHENTICATION AND ACCESS CONTROL** (Windows 2003) and click **EDIT**. The **Authentication Methods** page opens.
- 7 Clear **ENABLE ANONYMOUS ACCESS** (Windows 2003).
- 8 Go to **AUTHENTICATED ACCESS** section and select **INTEGRATED WINDOWS AUTHENTICATION** option.

- 9 Click **OK** to save the changes and close the **Authentication Methods** page.
- 10 Click **OK** to close the **Properties** page.

Configuring Internet Explorer 7.0/6.0 on clients

You must configure Integrated Windows Authentication on all clients running Internet Explorer 7.0/6.0. (Integrated Windows Authentication is enabled automatically in Internet Explorer 5.5.)

To configure Integrated Windows Authentication on clients running Internet Explorer 7.0/6.0:

- 1 Log on to the client using an account that belongs to the local Administrators group and start Internet Explorer.
- 2 Open Internet Explorer and click **TOOLS > INTERNET OPTIONS**.
- 3 Click the **SECURITY** option.
- 4 Select **INTERNET** or **LOCAL INTRANET** depending on your default zone and click **CUSTOM LEVEL**.
The **Security Settings** page opens.
- 5 Scroll down to the **USER AUTHENTICATION** section and make the following changes:
 - ▶ To authenticate the Windows user transparently, select **Automatic logon with current user name and password**.
 - ▶ To prompt the Windows user to enter logon credentials at the beginning of each session, select **Prompt for Username and Password**.
- 6 Click **OK** to close the **Internet Options** page.
- 7 Close the Internet Explorer page.
- 8 Close all other open instances of Internet Explorer for the change to take effects.

Adding the AccuRoute Web Client URL to the list of trusted sites

You must add the AccuRoute Web Client URL to the list of trusted sites on all client systems which will browse to the AccuRoute Web Client.

To add the AccuRoute Web Client URL to the list of trusted sites on a client system:

- 1 Log on to the client system using an account that belongs to the local Administrators group and start Internet Options. (It is accessible from Control Panel or Internet Explorer.)
- 2 Go to the **SECURITY** tab.

- 3 Select **Trusted sites** and click **SITES**.
- 4 Enter the AccuRoute Web Client URL and click **ADD**.
- 5 Clear **REQUIRE SERVER VERIFICATION (HTTPS:) FOR ALL SITES IN THIS ZONE** if this option is selected.
- 6 Click **CLOSE** to close the **Trusted Sites** dialog.
- 7 Click **APPLY** to save the changes and click **OK** to close the dialog box.

The AccuRoute Web Client URL is now added to the list of trusted sites. To verify that the system recognizes the AccuRoute Web Client URL as a trusted site, start Internet Explorer and go to the AccuRoute Web Client URL. Verify that AccuRoute Web Client loads. (Depending on your Windows Integrated Authentication configuration, you may need to login.)

Installing Active X ocx controls

AccuRoute Web Client uses Active X ocx controls when printing to a network printer or browsing the address book. You must therefore change the browser settings of Internet Explorer and activate the ActiveX ocx controls before using the AccuRoute Web Client.

To change the Active X ocx controls:

- 1 Open Internet Explorer and click **TOOLS > INTERNET OPTIONS**.
- 2 Click the **SECURITY** option.
- 3 In the **Select a zone to view or change security settings** select **TRUSTED SITES** and click **CUSTOM LEVEL**.
The **Security Settings** page opens.
- 4 Scroll down to the **ACTIVE X CONTROLS AND PLUG-INS**, and make the following changes:
 - ▶ For **Allow previously unused ActiveX controls to run without prompts**, select **ENABLE** option.
 - ▶ For **Allow Scriptlets**, select **ENABLE** option.
 - ▶ For **Automatic prompting for ActiveX control**, select **ENABLE** option.
 - ▶ For **Binary and scripts behavior**, select **ENABLE** option.
 - ▶ For **Download signed ActiveX control**, select **PROMPT** option.
 - ▶ For **Download unsigned ActiveX control**, select **PROMPT** option.
 - ▶ For **Run ActiveX controls and plug-ins** select **ENABLE** option.
 - ▶ For **Script ActiveX controls marked safe for scripting**, select **ENABLE** option.

- 5 Click **OK**. You are prompted to save the settings you made for this zone.
- 6 Click **OK** to save your changes.
- 7 Close all other open instances of Internet Explorer for the change to take effects.

Adding network printer

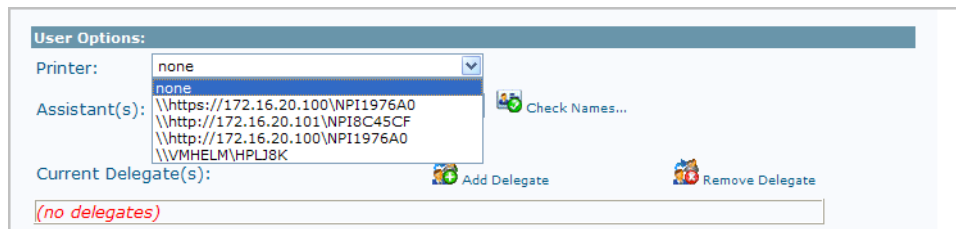
AccuRoute Web Client uses Active X controls to read the list of configured network printers on the client system. Before the network printers are listed in the AccuRoute Web Client, the network printers should be added to the Printer drop down text box under the **Preferences** page.

To add a network printer to your computer system:

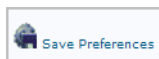
- 1 In the system where you installed AccuRoute Web Client, click **START > PRINTERS AND FAXES** and then click **ADD A PRINTER** to open the **Add Printer Wizard**.
- 2 Follow the instructions in the Wizard to add your network printers.

To add a network printer to your AccuRoute Web Client:

- 1 Login to the AccuRoute Web Client application.
- 2 Click **PREFERENCES**.
The **User Preferences** page opens listing the user information and options.
- 3 In the **PRINTER** text box choose the network printers from the drop down menu.



- 4 Click **SAVE YOUR PREFERENCES**.



Note If you do not save your preferences, your configuration is valid for the current session only. AccuRoute Web Client will not remember your choices if you log out or open a new session.

Required COM permissions for launching Remote Web Client

Before you can launch a Remote Web Client, you must configure COM permissions for Anonymous_logon on the AccuRoute Server.

To give Anonymous_Logon COM permissions:

- 1 Login to the system running the AccuRoute server using an account that belongs to the Administrator.
- 2 Click **START > CONTROL PANEL > ADMINISTRATIVE TOOLS > COMPONENT SERVICES**.
- 3 In the console, expand **COMPONENT SERVICES > COMPUTERS**.
- 4 Right click **MY COMPUTER** and select **Properties** from the drop down menu.
- 5 Click **COM SECURITY**.
- 6 In the **Access Permissions** section, click **EDIT LIMITS**. The **ACCESS PERMISSION** page opens.
- 7 For user **Anonymous_logon**, select **LOCAL ACCESS** and **REMOTE ACCESS** permissions.
- 8 Click **OK** to close the page.
- 9 In the **Launch and Activate Permissions** section, click **EDIT LIMITS**. The **Launch Permissions** page opens.
- 10 For user **Anonymous_logon**, select **LOCAL LAUNCH**, **REMOTE LAUNCH**, **LOCAL ACTIVATION** and **REMOTE ACTIVATION** permissions.
- 11 Click **OK** and then **OK** to close the Properties page.

Required firewall configurations for launching Remote Web Client

Before you can launch a Remote Web Client, you must configure firewall settings on the AccuRoute Server.

To configure firewall settings:

- 1 Login to the system running the AccuRoute server using an account that belongs to the Administrator.
 - 1 Click **START > CONTROL PANEL > WINDOWS FIREWALL**.
 - 1 Click **EXCEPTIONS**, then **ADD PROGRAMS**. The **Add a program** page opens.
 - 2 Browse to **C:\PROGRAMFILES\OMTOOL\OMTOOLSERVER\BIN\OMWEBGFLOOKUPU.EXE**.
 - 3 Click **OK**.
- This process excludes the executable from the firewall block.

- 4** Browse to **C:\PROGRAMFILES\OMTOOL\OMTOOLSERVER\BIN\OMGFSERVERU.EXE**.
- 5** Click **OK**.
This process excludes the executable from the firewall block.
- 6** Click **ADD PORT**. The **Add a Port** page opens.
- 7** In the **NAME** text box, enter **browser**.
- 8** In the **PORT NUMBER** text box, enter **80**.
- 9** Check if there is an entry called **End Port Mapper(DCOM)**.
If not click **ADD PORT**. In the **NAME** text box, enter **End Port Mapper (DCOM)**. In the **PORT NUMBER** text box, enter **135**. Select the TCP option.
- 10** Click **OK** to save your changes.

Section 5: Optional configuration

This section includes:

[Customizing the AccuRoute Web Client](#) (5-1)

[Changing the file format of faxes in the Web Client](#) (5-1)

[Configuring AccuRoute Web Client to authenticate with a local database](#) (5-2)

Customizing the AccuRoute Web Client

The AccuRoute Web Client displays all email accounts associated with a user. However, if you want, you can configure the AccuRoute Web Client to display only the primary email address for each user. This is useful if users have multiple email addresses associated with their user records in Active Directory.

For example, if ABC company gets purchased by XYZ company, then some users might have two email addresses—one with the ABC domain name, and the other with the XYZ domain name. In this instance, Active Directory defines the primary email address for users as the address with the XYZ domain name. Therefore when you configure the AccuRoute Web Client to display only the primary email address of each user, users see faxes associated with the XYZ address only.

To configure the AccuRoute Web Client to display only the primary email address of each user:

- 1 Navigate to the `\\OMTOOL\ACCUROUTEWEB\CONFIGURATION` on the system where you installed the client.
- 2 Open the `View.Default.xml` file in Notepad.
- 3 Locate the `<ShowAllProxies>` node.
- 4 Set the value to `false`.
If you set the value to `true`, it will show all primary and secondary email addresses.
- 5 Save and close the file.

Changing the file format of faxes in the Web Client

The AccuRoute Web Client shows faxes in the PDF format by default. If you want to change the display format of faxes to TIF, complete the following procedure.

Note If you configure the AccuRoute Web Client to display faxes in the TIF format, the Web Client users must have an image viewer that displays the TIF files.

Setting the file format of faxes:

To set the file format of faxes:

- 1 Navigate to the `\\OMTOOL\ACCUROUTEWEB\CONFIGURATION` on the system where you installed the client.
- 2 Open the `AccuRouteWeb.xml` file in Notepad.
- 3 Locate the `<AttachmentFormat>` node.
- 4 Set the value to either `PDF` or `G4.TIF`. For example:
: `<AttachmentFormat>PDF</AttachmentFormat>`
- 5 Save and close the file.
- 6 Continue to perform additional configuration in the Omtool Server Administrator.

To configure the Omtool Server Administrator:

- 1 Open the Omtool Server Administrator and right click the server name.
- 2 Select **PROPERTIES** from the drop down menu to open **Server Properties** page.
- 3 Click **SETTINGS** and in the **ENABLE WEB CLIENT INTEGRATION FOR** section, select the file format that you added in the `AccuRouteWeb.xml` file.
- 4 For example, if you added `PDF` in the xml file, select the **PDF** option (it is also the default). If you added `G4.TIF` file format in the xml file, select the **TIF** format.
- 5 Click **OK** to save your changes.
- 6 Restart the World Wide Web Publishing Service.

Configuring AccuRoute Web Client to authenticate with a local database

To configure AccuRoute Web Client to authenticate with a local database:

- 1 Navigate to the `\\OMTOOL\ACCUROUTEWEB\CONFIGURATION` on the system where you installed the client.
- 2 Open the `AccuRouteWeb.xml` file in Notepad.

- 3 Locate the `<Authentication type>` node and change the value to DB:

```
<Authentication type="DB">
```

- 4 Add the following node under the `<authentication node>` as shown in the example below.:

```
<Connection>
  <Server>SERVERNAME</Server>
  <Authentication type="DB">
    <DB>
      <ConnectionString>Provider=Microsoft.Jet.OLEDB.4.0;Data
Source=C:\Program
Files\omtool\AccuRouteWeb\Configuration\GenifaxStatusLogon.mdb;</
ConnectionString>
      <Table>LoginID</Table>
      <UserIDColumn>LoginId</UserIDColumn>
      <PasswordColumn>Password</PasswordColumn>
    </DB>
    <Notes>
      <Search>
        <Server>
```

» The example is assuming that the Web Client is installed in the default C:\Programfiles\omtool\accourouteweb folder and that inside the configuration folder you have the genifaxstatuslogon.mdb file. Change the code per your configuration before proceeding.

- 5 Save your changes and close the file.
- 6 Open the genifaxstatuslogon.mdb and locate the table **LoginID**. This table has two columns - loginId and password.
- 7 Update the loginid column with the email of the user (for example janedoe@domain.com where domain is the domain name under which AccuRoute server is running, so that it can pull messages from AccuRoute server).
- 8 Open a command prompt and click **START > RUN**.
- 9 Enter `cmd` and then perform a `iisreset`.

This is necessary to stop all the website and application pools and restart them. Without this reset, the changes done to configuration.xml do not get reflected.

Section 5: Optional configuration

Section 6: Troubleshooting

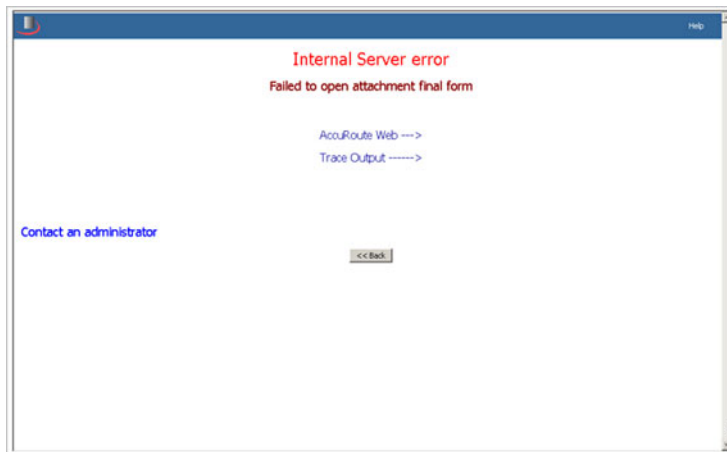
This section includes:

[Changing the output format in the configuration file - AccuRouteWeb.xml invalidates all history items \(6-1\)](#)

Changing the output format in the configuration file - AccuRouteWeb.xml invalidates all history items

Problem:

In the AccuRouteWeb.xml file, I changed the output format (that is the value of the **AttachmentFormat** node) from PDF to TIFF. I also selected as the output format in the Omtool Server Administrator. However, when I open the AccuRoute Web Client and try to view a message attachment in the Inbox or the Sent Items folder, I get the following error:



Solution:

The reason this is happening is because switching from PDF to TIFF or vice-versa, invalidates all history items. Messages that are created and processed after you saved the new configuration can use the new format you configured.

