Litigation Support connector installation and integration guide for Concordance

For AccuRoute v2.3

July 28, 2009

Omtool, Ltd.
6 Riverside Drive
Andover, MA 01810
Phone: +1/1 978 327 5700
Toll-free in the US: +1/1 800 886 7845
Fax: +1/1 978 659 1300

Omtool Europe
25 Southampton Buildings
London
WC2A 1AL
United Kingdom
Phone: +44/0 20 3043 8580
Toll-free in the UK: +44/0 80 0011 2981
Fax: +44/0 20 3043 8581

Web: http://www.omtool.com

© 2009 by Omtool, Ltd. All rights reserved. Omtool™, AccuRoute® and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Omtool product documentation is provided as part of the licensed product. As such, the documentation is subject to the terms outlined in the End User License Agreement. (You are presented with the End User License Agreement during the product installation. By installing the product, you consent to the terms therein.)

Permission to use the documentation is granted, provided that this copyright notice appears in all copies, use of the documentation is for informational and non-commercial or personal use only and will not be copied or posted on any network computer or broadcast in any media, and no modifications to the documentation are made. Accredited educational institutions may download and reproduce the documentation for distribution in the classroom. Distribution outside the classroom requires express written permission. Use for any other purpose is expressly prohibited by law.

Omtool and/or its suppliers make no guaranties, express or implied, about the information contained in the documentation. Documents and graphics contained therein could include typographical errors and technical inaccuracies. Omtool may make improvements or changes to the documentation and its associated product at any time.

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.
- **DOWNLOADS & DOCS** to access online documentation, software updates, and downloads.

Customer service and technical support

Contact Omtool Customer Service or Technical Support using any of the following methods:

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

Technical support requires an active support contract. For more information, go to http://www.omtool.com/support/entitlements.cfm.

Sales, consulting services, licenses, and training

Contact Omtool Sales using any of the following methods:

- **Phone**: 978 327 5700 or 800 886 7845 (toll-free in the US)
- **Fax**: 978 659 1300
- **E-mail**: sales@omtool.com

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Contents

Section 1: Introduction

Litigation Support connector for Concordance 1-1
Release notes 1-1
- Enhancements 1-1
- Resolved issues 1-1
- Limitations 1-2

Related documentation 1-2

Section 2: Requirements

Server requirements 2-1
Client requirements 2-1

Section 3: Installation

Downloading the Litigation Connector Update for AccuRoute v2.3 3-1
Special instructions for clustered servers 3-1
Applying the Litigation Connector Update for AccuRoute v2.3 3-2
Adding the Litigation Support connector to the AccuRoute server 3-4
Reinstalling AccuRoute Desktop on all client systems 3-7

Section 4: Required configurations

Pre-configuring Concordance cases 4-1
- Creating a directory structure to support Concordance cases 4-1
- Setting sharing permissions and security permissions 4-1

Configuring the Sequencer component 4-2
Configuring Registered Users 4-4
..... 4-4

Section 5: Configuring cases

- Adding cases to Litigation Support System connector for Concordance 5-1
- Modifying cases for Litigation Support System connector for Concordance 5-4
- Adding custom user-defined fields to Litigation Support System connector for Concordance 5-4
- Modifying custom user-defined fields for Concordance 5-7

Section 6: Testing

Sending a message to Concordance using AccuRoute Desktop 6-1
Sending an End of load file using AccuRoute Desktop 6-7

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Section 7: Troubleshooting

Detecting workflow issues 7-1
Troubleshooting the delivery mechanism 7-1
Troubleshooting the message on the Omtool server 7-2
Troubleshooting the multifunction device 7-3
Troubleshooting the client 7-4
Routing sheets do not display Concordance destination 7-4

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Section 1: Introduction

This guide contains instructions on deploying the Litigation Support connector for Concordance. It is written for system administrators with knowledge of the Omtool server.

This section includes:

Litigation Support connector for Concordance (1-1)

Release notes (1-1)

Related documentation (1-2)

Litigation Support connector for Concordance

The Litigation Support connector works with Litigation Support System software such as Concordance to facilitate importing documents to the Litigation Support application.

Users can profile documents using AccuRoute Desktop by specifying Concordance as a destination. The Litigation Support connector for Concordance creates a single .opt and a single .dat file in the specified case's working folder. When the user creates and sends the End of Load File Routing Sheet, the .opt and .dat load files are copied to their final destination folder.

When the Compose is complete and the End of Load File Routing Sheet is sent, the working folder will be empty and the composed files will reside in the final folder. The final folder contains a single page TIFF file for each page that is referenced by the appropriate load file. An OCR text file associated with the entire document might also exist, depending on the configuration of the Litigation Support connector.

Release notes

Enhancements

Litigation Support connector for Concordance has been qualified with AccuRoute Desktop V2.2.3.

Resolved issues

There are no new resolved issues in this release.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Limitations

There are no known limitations in this release.

Related documentation

- AccuRoute v2.3 installation guide - http://www.omtool.com/documentation/AccuRoute/v23/Server/AccuRouteV23ServerInstallConfigureGuide.pdf
- AccuRoute Desktop installation guide - http://www.omtool.com/documentation/AccuRoute/v22/AccuRouteDesktop/AccuRouteDesktopV222InstallGuide.pdf
- AccuRoute Desktop user guide - http://www.omtool.com/documentation/AccuRoute/v22/AccuRouteDesktop/AccuRouteDesktopV222UserGuide.pdf
- Quick start guide:
    - Sending a message to Concordance using AccuRoute Desktop - http://www.omtool.com/documentation/AccuRoute/v23/LSSConnector/Concordance/LSSConnectorConcordanceQuickStartGuide.pdf
    - Sending an End of load file using AccuRoute Desktop - http://www.omtool.com/documentation/AccuRoute/v23/LSSConnector/Concordance/LSSConnectorConcordanceEOLQuickStartGuide.pdf
  - Administrator help - http://www.omtool.com/documentation/omtoolserver/v36/admin/

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Section 2: Requirements

This section includes:

Server requirements (2-1)
Client requirements (2-1)

Server requirements

The system where you install the Litigation Support connector must meet the following minimum requirements:

- ❒ AccuRoute v2.3.

  To check the version of the server, start the Omtool Server Administrator. Expand the items in the console tree if necessary. Right-click the server and select **PROPERTIES**.

- ❒ Valid Litigation Support connector license key

  For information on how to purchase the license key, contact omtool sales.

Client requirements

The client requirements are:

- ❒ AccuRoute Desktop v2.2.3 build 516 (this version is available after you reinstall AccuRoute Desktop. For more information, see Reinstalling AccuRoute Desktop on all client systems.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Section 3: Installation

This section includes:

Downloading the Litigation Connector Update for AccuRoute v2.3 (3-1)
Special instructions for clustered servers (3-1)
Applying the Litigation Connector Update for AccuRoute v2.3 (3-2)
Adding the Litigation Support connector to the AccuRoute server (3-4)
Reinstalling AccuRoute Desktop on all client systems (3-7)

Note If you have an existing LSS connector, delete the existing connector, install the Litigation Connector Update for AccuRoute v2.3 and then add a new LSS connector.

Downloading the Litigation Connector Update for AccuRoute v2.3

The Litigation Connector Update for AccuRoute v2.3 is available for download for a separate fee. Please contact omtool sales for information on how to purchase the update.

To download the Litigation Connector Update for AccuRoute v2.3:

1. Open Internet Explorer browser and go to http://www.omtool.com/support.
2. Log in using the customer number provided to you by customer service when you purchased the update.
3. Locate the module **Litigation Connector Update for AccuRoute v2.3** 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.

Special instructions for clustered servers

If you are applying the update to AccuRoute servers in a cluster you must follow the steps outlined below:

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

To apply the Litigation Connector Update for AccuRoute v2.3 to AccuRoute servers in a cluster:

1. Shut down the secondary server.
2. Stop the Cluster Manager service in the primary server.
3. Apply the update to the primary server. Go to Applying the Litigation Connector Update for AccuRoute v2.3.
4. Start the secondary server.
5. Shut down the primary server.
6. Stop the Cluster Manager service in the secondary server.
7. Apply the update to the secondary server. Go to Applying the Litigation Connector Update for AccuRoute v2.3.
8. Start the primary server.
9. Confirm that the primary server has resumed the workload in the cluster.

Applying the Litigation Connector Update for AccuRoute v2.3

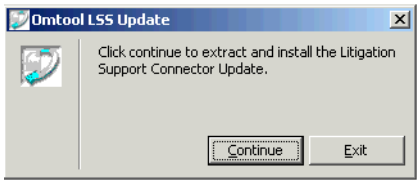
To apply the Litigation Connector Update for AccuRoute v2.3:

1. Go to the location where you saved `ARS2.3-LitigationConnector.exe` file.
2. Shutdown all Omtool services.

Note Since the installation of this update requires shutdown of all services, you must plan to install the update after hours or at a time when production will not get affected.

3. Double click the executable.

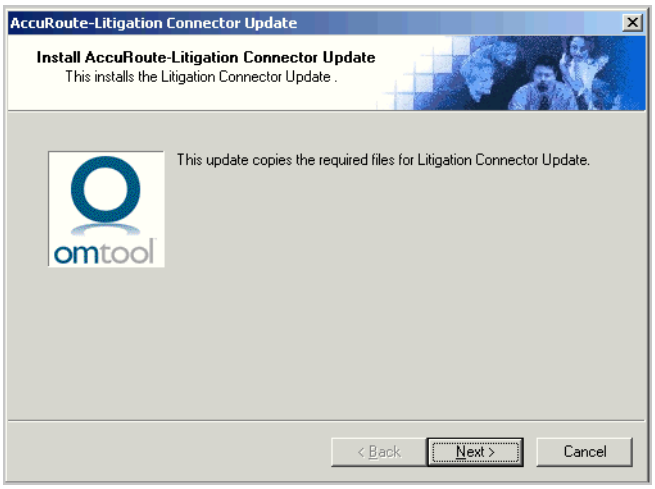
   The **Omtool LSS Update** page opens prompting you to extract and install the update.



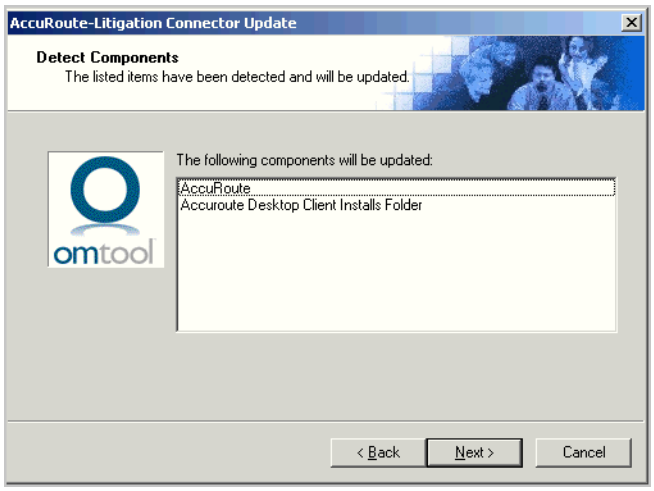
4. Click **CONTINUE** to extract the files to a temporary location on your system.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

When extraction is complete, the **AccuRoute-Litigation Connector Update** page opens.



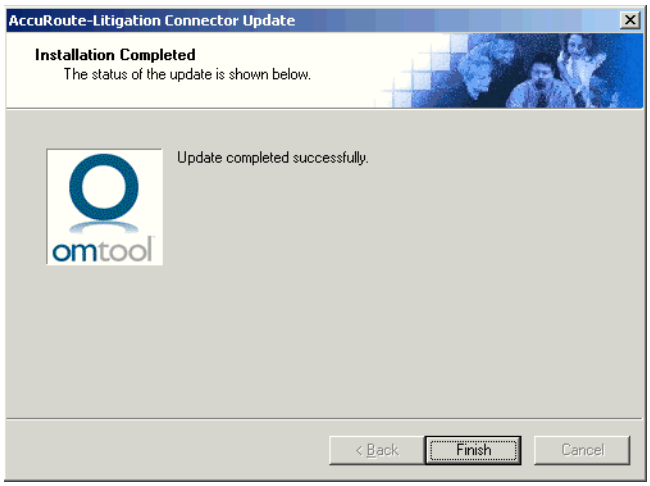
5 Click **NEXT**. The **Detect Components** page opens listing all the components that will get updated.



6 Click **NEXT** to begin the update.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

A progress bar shows the status of the update. When update is complete you see the Installation Completed page.



7 Click **FINISH** to exit the wizard.

Adding the Litigation Support connector to the AccuRoute server

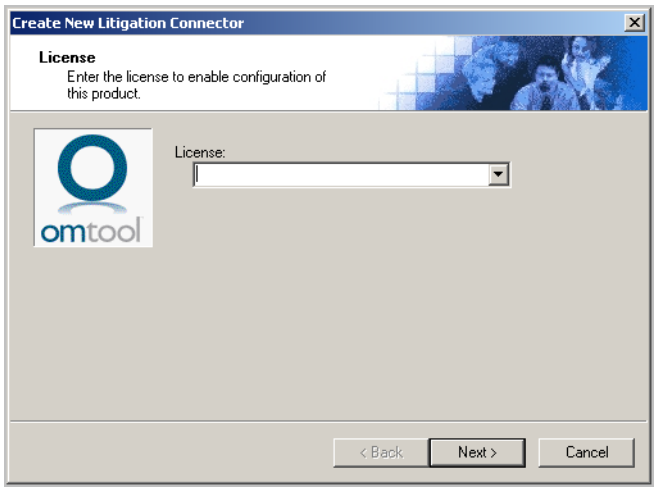
Note If you have an existing LSS connector, delete the existing connector, install the Litigation Connector Update for AccuRoute v2.3 and then add a new LSS connector.

To add the Litigation Support connector for Concordance:

1 Open the Omtool Server Administrator console.

2 Right-click **CONNECTORS** in the console tree and select **NEW > LITIGATION SUPPORT CONNECTOR**. The **License** page opens.

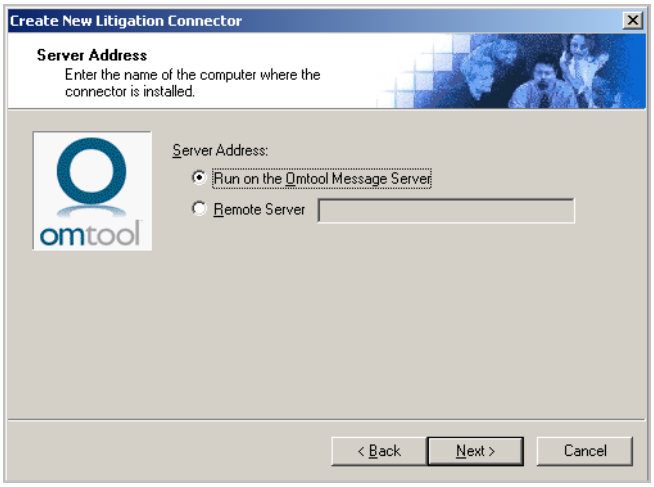
© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.



3 In the **LICENSE** text box, enter the license key for the Litigation Support System connector.

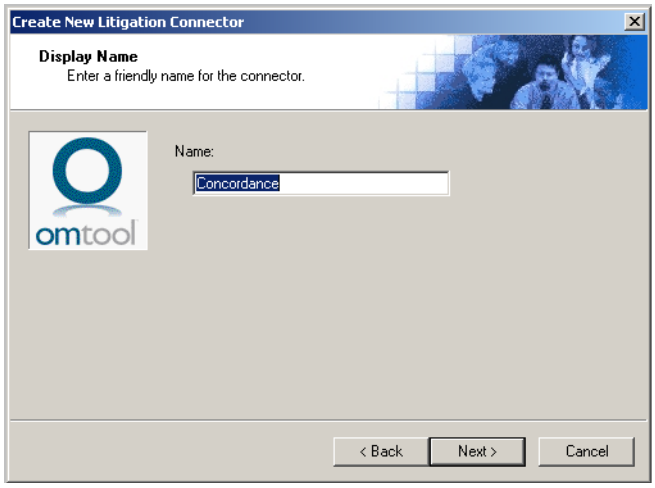
Note If you do not have a license, contact omtool sales.

4 Click **NEXT**. Click **NEXT**. The **Server Address** page opens.

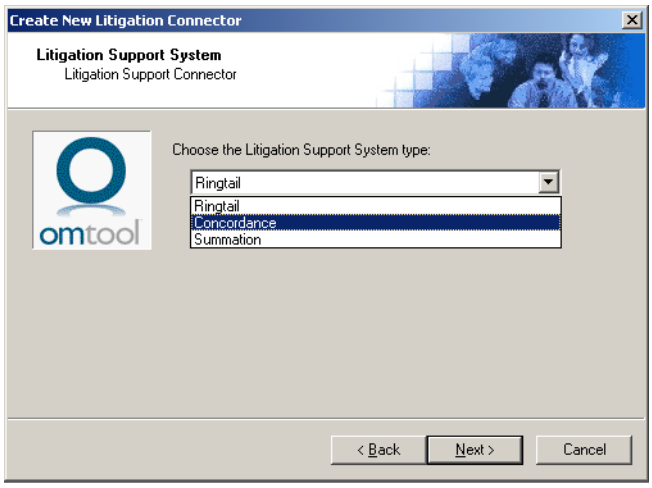


© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

5 Click **NEXT**. The **Display Name** page opens.

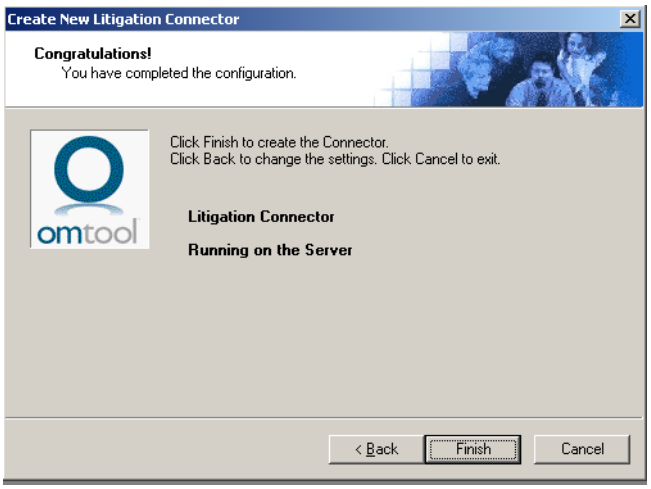


6 Enter a descriptive name for this connector in the **NAME** text box and click **NEXT**. T**he Litigation Support System** page opens.



7 Select **CONCORDANCE** from the drop-down list and click **NEXT**. The **Congratulations** page opens.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.



8 Click **FINISH**.

Reinstalling AccuRoute Desktop on all client systems

After you have installed the Litigation Connector Update for AccuRoute v2.3 on the server, new setup files for Accuroute Desktop are available in the **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\CLIENTS\ACCUROUTEDESKTOP** folder. You must reinstall Accuroute Desktop on all client systems using the new setup files from this folder to take advantage of the AccuRoute Desktop enhancements added by the update.

For more information on how to install AccuRoute Desktop, see the AccuRoute Desktop installation guide.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Section 4: Required configurations

This section includes:

Pre-configuring Concordance cases (4-1)
Configuring the Sequencer component (4-2)
Configuring Registered Users (4-4)

Pre-configuring Concordance cases

Before you install the Litigation Support connector, you need to create a directory structure for the case load files. After creating the directory structure, set sharing and security permissions on each folder.

Creating a directory structure to support Concordance cases

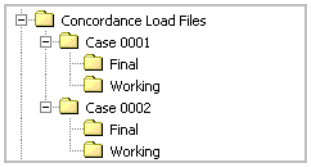
Note If you add cases to Concordance after the initial setup of the connector, you will need to add them to the directory structure for Concordance as well.

To create the Concordance directory structure:

1. Create the top level folder named Concordance Load Files. (You can name for this folder anything you want.)
2. Under the Concordance Load Files folder, create a sub-folder for every case you want to work with.
3. Within each case's sub-folder create a Working folder and a Final folder.

When you finish creating the directory structure, it might look similar to the following example:

Figure 4-A: **Directory structure**



The above illustration demonstrates a valid directory structure for Concordance.

Setting sharing permissions and security permissions

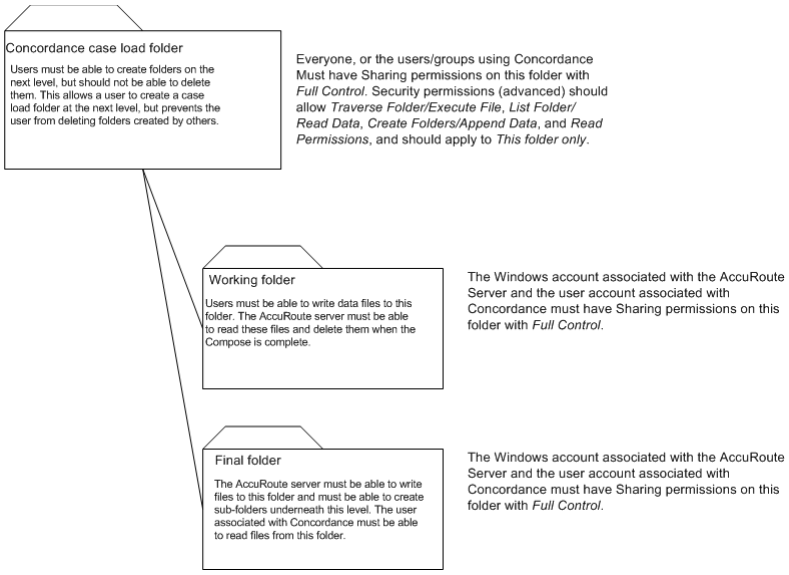
After you create the directory structure for Concordance, configure the sharing and security permissions.

The minimum required sharing and security permissions allow users to do the following:

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

- All Concordance users must be able to access all levels of the Concordance Load Files structure.
- All Concordance users must be able to create folders on the level below the Concordance Load Files folder.
- The Windows account associated with the Omtool server must have access to all levels of the Concordance Load Files structure and security permissions with Full Control.
- The user account associated with Concordance must have access to all levels of the Concordance Load Files structure and security permissions with Full Control. This applies to AccuRoute environments only.
- If you are in a clustered environment, you must locate case directories on a high profile server.

Figure 4-B: **Minimum requirements for Concordance**



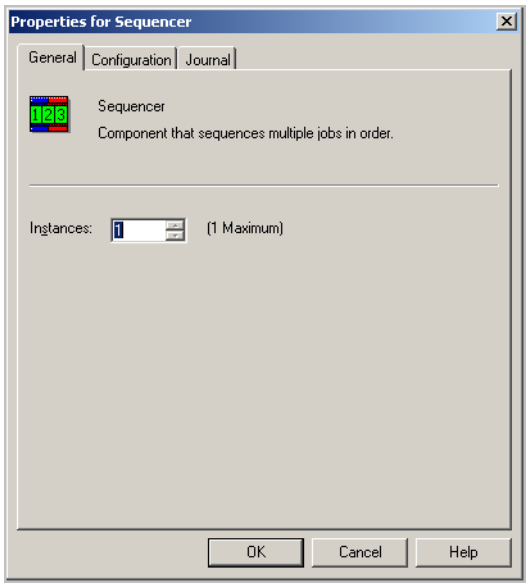
The above diagram illustrates the minimum requirements for Concordance users.

Configuring the Sequencer component

To configure the Sequencer component:

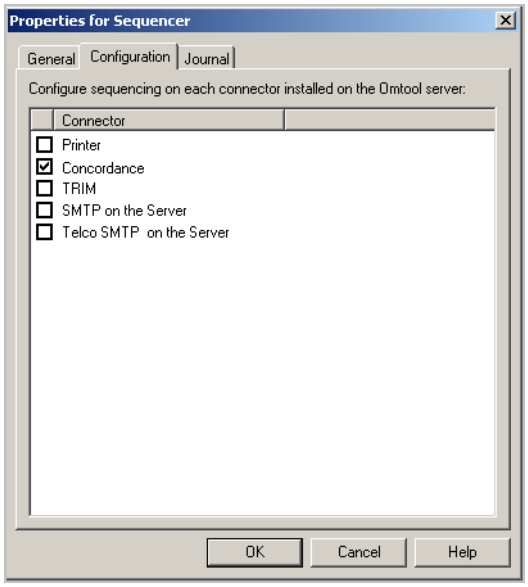
1. Start Omtool Server Administrator.
2. Click **COMPONENTS** in the console tree, and double click the **SEQUENCER** component in the details pane.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.



3 Click the **CONFIGURATION** tab. You see a list of installed destination connectors.

4 Select the **CONCORDANCE** connector. If you want to view the connector names in alphabetical order, click **CONNECTOR** in the title bar.



5 Click **OK**.

When you enable the Concordance connector for sequencing, the Sequencer component creates an internal queue for the connector. Submitting a job to the Concordance connector adds it to the internal queue in the order in which it was submitted. After a successful Compose, the Sequencer component holds the job in the queue until any previous jobs to the Concordance connector have completed composing.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

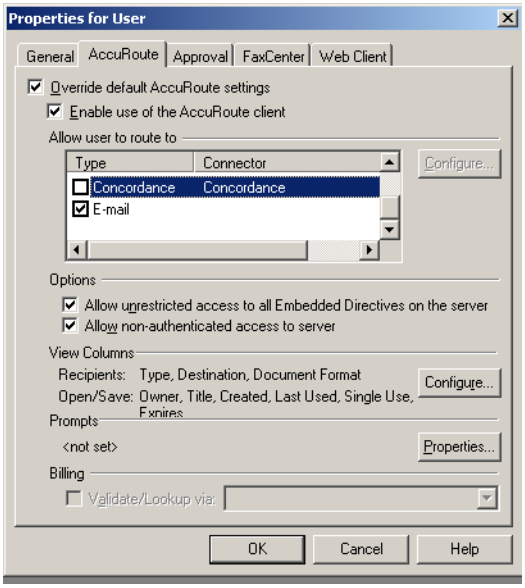
Configuring Registered Users

If you have added support for Concordance and you want to make it available to users as a recipient type in AccuRoute Desktop, you must modify the AccuRoute properties of registered users.

If any individual users are registered on the Omtool server, complete this procedure once to modify user defaults and once for each individual user.

To enable Concordance as a recipient type in AccuRoute Desktop for default or individual registered users:

1. Click **REGISTERED USERS** in the console tree and double-click an individual user in the details pane, or right-click **REGISTERED USERS** in the console tree and select **USER DEFAULTS**.
2. Click the **ACCUROUTE** tab.
3. Select **ENABLE USE OF THE ACCUROUTE CLIENT**.
4. Locate the **ALLOW USER TO ROUTE TO LIST** and select **CONCORDANCE**.



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

Note Changes made to **REGISTERED USERS > USER DEFAULTS** do not affect any individual registered user. Individual registered users will need to be modified separately (using the same procedure described here, Concordance as a recipient type must be enabled for them) before they can see Concordance listed as a recipient type in their AccuRoute Desktop.

Concordance is now available as a recipient in AccuRoute Desktop.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Section 5: Configuring cases

This section includes:

Adding cases to Litigation Support System connector for Concordance (5-1)
Modifying cases for Litigation Support System connector for Concordance
Adding custom user-defined fields to Litigation Support System connector for Concordance (5-4)
Modifying custom user-defined fields for Concordance (5-7)

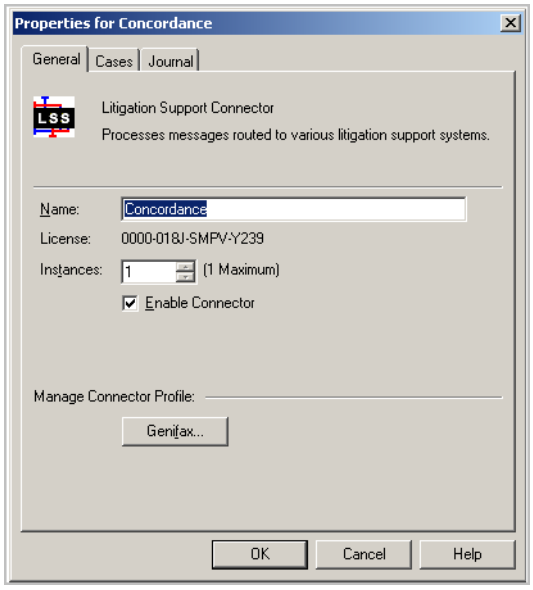
Adding cases to Litigation Support System connector for Concordance

Note If you add cases within Concordance after the initial setup of the connector, you will also need to add them to the Case Properties of the Litigation Support System connector.

To configure the Litigation Support connector for Concordance:

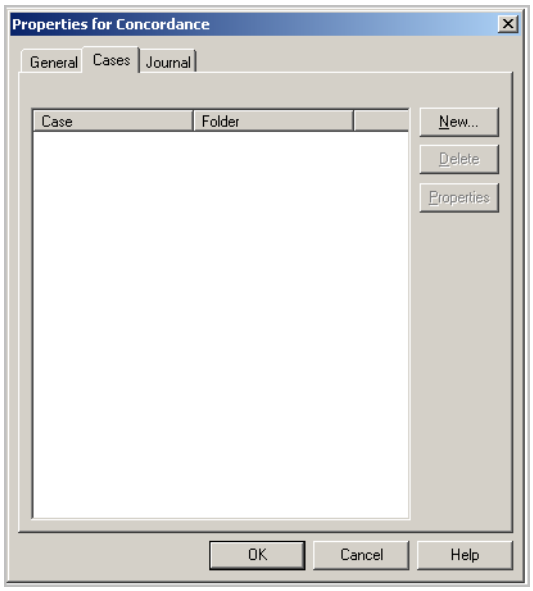
1 Start Omtool Server Administrator.

2 Click **CONNECTORS** in the console tree, and double click the Litigation Support System connector for Concordance in the details pane. The **Properties** page opens.

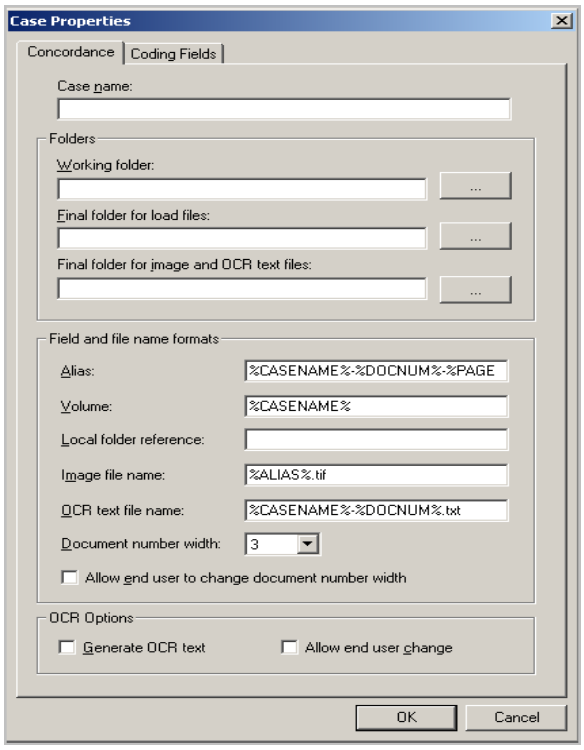


3 Click the **CASES** tab.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.



4 Click **NEW**. The **Case Properties** page opens.



5 In the **CASE NAME** text box, enter a descriptive name.

6 For the **WORKING FOLDER** text box, click the **BROWSE** option. Navigate to the working folder for the case load file.

7 For the **FINAL FOLDER FOR LOAD FILES** text box, provide the network path to the Final folder. All Image and OCR text files are stored in this location.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Load files are stored in the working folder until the end of load file Routing Sheet is received by the Omtool server. When the end of load file Routing Sheet is received, the Litigation Support connector for Concordance copies the files from the working folder to the final folder.

8 For the **FINAL FOLDER FOR IMAGE AND OCR TEXT FILES** text box, provide the network path to the folder. All Image and OCR Text files are saved here.

9 In the **Field and file name formats** section, configure the following options. For more information on the Field and file name formats section, see More on the Field and file name formats section:

- In the **ALIAS** text box, enter the case name as entered in the Case Name text box. This is the name used by Concordance/Opticon to uniquely identify the image. It is saved into the load file for each image.

  The Case Name must be followed by the Document Number. The document number is the number assigned to the document by the connector.

Note The %DOCNUM%-%PAGENUM% or %SEQNUM% variables should not be deleted from the Alias field as these variables are used to assign the unique image key for each page present in a document.

- In the **VOLUME** text box, enter the CD or disk volume that is uniquely identified by Concordance.
- In the **LOCAL FOLDER REFERENCE** text box, enter the path to the local folder. Use the format "[drive letter]:\[folder path]". Do not use the UNC path to the folder.
- In the **IMAGE FILE NAME** text box, enter the name of the TIF file without the path to the file.
- In the **OCR TEXT FILE NAME** text box, enter the name of the OCR text file without the path.
- In the **DOCUMENT NUMBER WIDTH** drop down, select a width. The Width field is used to control the width of the number field used to number document and page files. Valid widths are: 2, 3, 4, 5, 6, and 7. For example if the Width is set to five, the resulting file name will be 00001.tif. In most cases, documents will be numbered starting with the specified number. If there is a document with a higher number already referenced in the load file, however, the starting number will begin at the next highest number.

Note Document number width should not be changed till the case is closed as this may lead to issues with document naming.

10 In the **OCR Options** section, you can configure the following:

- **GENERATE OCR TEXT** (optional) - Selecting this option will create OCR text files in addition to the single page TIF files. OCR text files are searchable when imported into Concordance. If this option is not selected, only the single page TIF files are created, and the document is not searchable within Concordance.
- **ALLOW END USER CHANGES** (optional) - Selecting this option will enable the AccuRoute Desktop user to determine to generate OCR text files or not.

11 Click **OK** to add the case.

12 Repeat the steps above to add more cases.

More on the Field and file name formats section

The options in the Field and file name formats section support substitutions of the following variables:

- %CASENAME% - The case name as entered in the Case Name text box

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

- %DOCNUM% - The document number assigned by the connector
- %PAGENUM% - The page number of the document assigned by the connector
- %ALIAS% - The alias as entered in the "Alias" field in this section.
- %JOBID% - The AccuRoute job ID number.
- %SEQNUM% - The documents saved are numbered in sequence.

Modifying cases for Litigation Support System connector for Concordance

To modify a case:

1. Login to the system running the AccuRoute server using an account that belongs to the Administrator and click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.
2. Expand the console tree and click **CONNECTORS**.

   The components are listed in the details pane.
3. Double click the Litigation Support connector to open the **Properties** page.
4. Click **CASES**. A list shows all predefined cases.
5. Select the case you want to modify and click **PROPERTIES**. The **Case Properties** page opens.
6. Make modifications as needed. For details on the options you can modify, see Adding cases to Litigation Support System connector for Concordance.
7. Click **OK** to save your changes.

Adding custom user-defined fields to Litigation Support System connector for Concordance

The Litigation Support System connector, by default, does not contain any custom fields. The Coding Fields tab allows you to add or modify user-defined fields that are explicitly supported by Concordance.

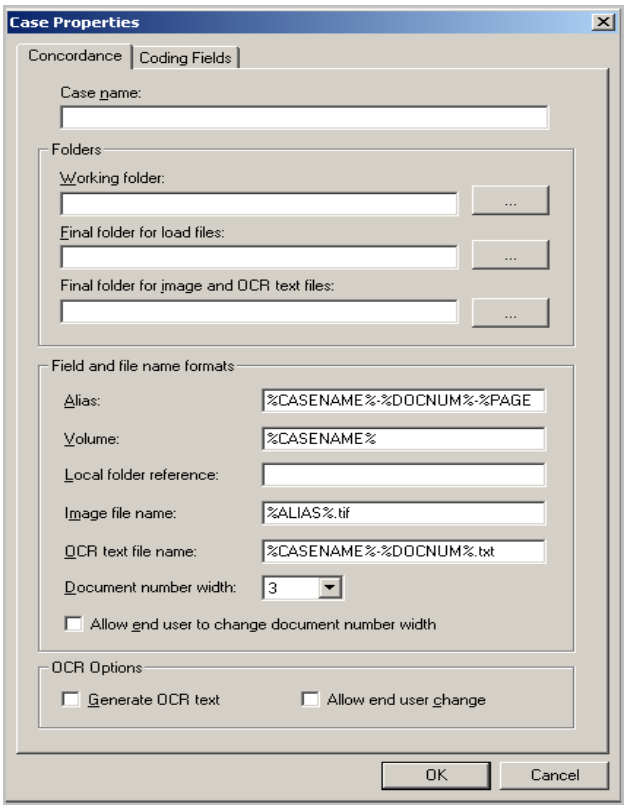
Note You should not add new Coding fields to a case till it is closed as the information may not be correctly updated in the load file

To add a custom user-defined field to the Litigation Support System connector:

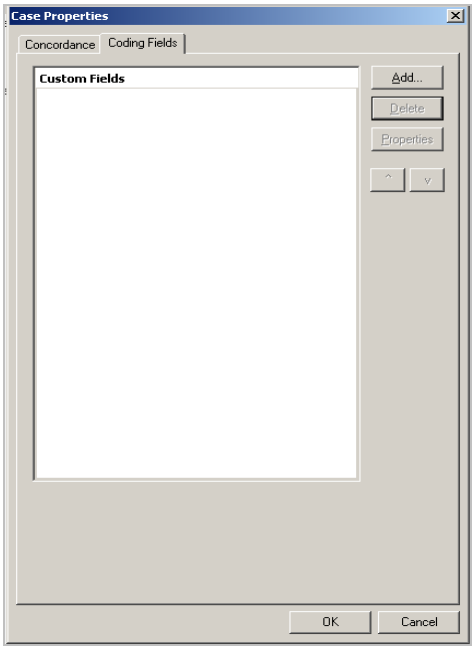
1. Start Omtool Server Administrator.
2. Click **CONNECTORS** in the console tree, and double click the Litigation Support System connector for Concordance in the details pane. The **Properties** page opens.
3. Go to the **CASES** tab.
4. Highlight a case and click **PROPERTIES**.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

5 The **Case Properties** opens.

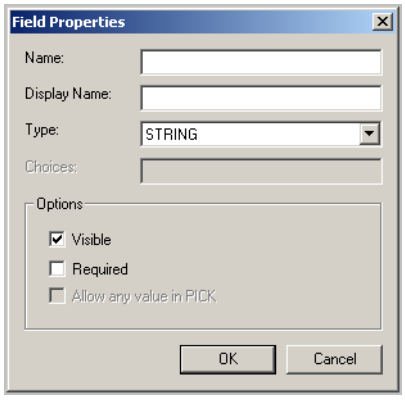


6 Click the **CODING FIELDS** tab.



© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

7 Click **ADD**. The **Field Properties** page opens.



8 In the **NAME** text box, enter the field name as it exists in Concordance. This is the actual, unique field name and not a display name.

9 In the **DISPLAY NAME** text box, enter a descriptive name for the field you are adding. The name you enter here appears as a label on the Coding Fields tab in both the Litigation Support System connector for Concordance and AccuRoute Desktop.

10 From the **TYPE** drop-down list, select one of the following values. The value you select determines the kind of control that is presented to the AccuRoute Desktop user on the Coding Fields tab when adding a Concordance destination.

- **STRING** - This type stores characters and words, and is included within double quotation marks. Numbers and other numerical characters are treated as text. For example: "`This is string value number 1.`"
- **NUMBER** - This type stores whole numbers. For example: `250`
- **BOOLEAN** - This type presents a true/false choice for the field. Select the check box if the property is true, clear the check box if the property is false. For example: `Active case?` ❑
- **DATE** - This type defaults the value of the field to today's date. The date is presented in mm/dd/yyyy format, and the AccuRoute Desktop user can change the date. For example: `12/05/2006`
- **PICK** - This type presents a pick list of data to the AccuRoute Desktop user via a drop-down box. When you select this type, the **CHOICES** and **ALLOW ANY VALUE IN PICK FIELDS** are enabled. For example, the following values could appear on a pick drop-down list: `1 2 3 4 5`

11 In the **CHOICES** text box, enter the valid values in this field, separated by a delimiter. Valid delimiters are comma (`,`), pipe (`|`), and semicolon (`;`).

Important This text box is enabled only for the data type **PICK**.

12 In the **OPTIONS** section, select one or more of the following options:

- **VISIBLE** - If this option is selected, the custom field is visible to the AccuRoute Desktop user on the Coding Fields tab. If this option is not selected, the AccuRoute Desktop user cannot see the custom field on the Coding Fields tab. Some fields specific to Concordance are always enabled.
- **REQUIRED** - If this option is selected, the custom field is required when adding a Concordance destination within AccuRoute Desktop. Selecting this option makes the custom field visible to the AccuRoute Desktop user even if the Visible option is not selected. If this option is not selected, the AccuRoute Desktop user can choose not to include information for this field on the message.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

- **ALLOW USER TO ENTER NEW VALUES IN PICKLIST** - If this option is selected, when the AccuRoute Desktop user sees a field on the Coding Fields tab that contains a pick list, the user can enter information not included on the pick list. If this option is not selected, the AccuRoute Desktop user is restricted to the choices displayed in the pick list.

13 Click **OK** three times to save your changes and close the **Properties** page.

Modifying custom user-defined fields for Concordance

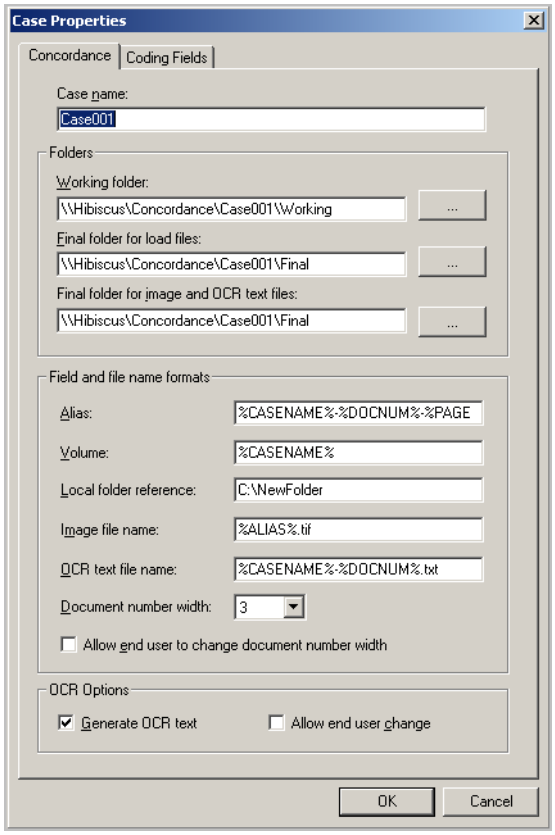
To modify a custom user-defined field to the Litigation Support System connector:

1 Start Omtool Server Administrator.

2 Click **CONNECTORS** in the console tree, and double click the Litigation Support System connector in the details pane. The **Properties** page opens.

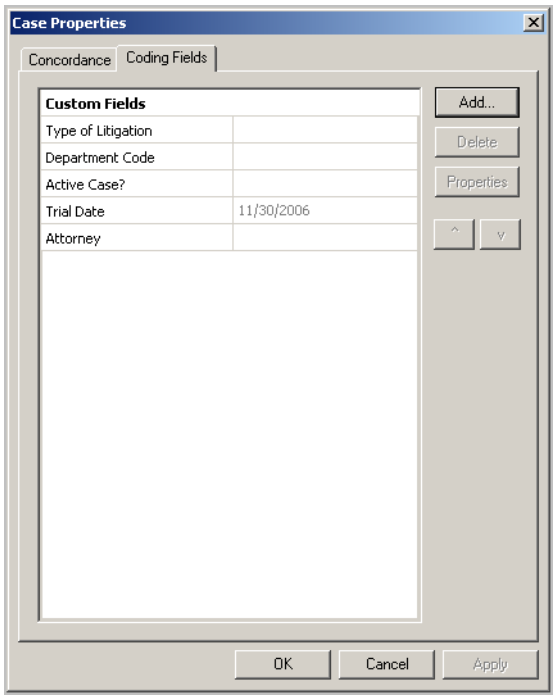
3 Click the **CASES** tab.

4 Highlight a case and click **PROPERTIES**. The **Case Properties** page opens.

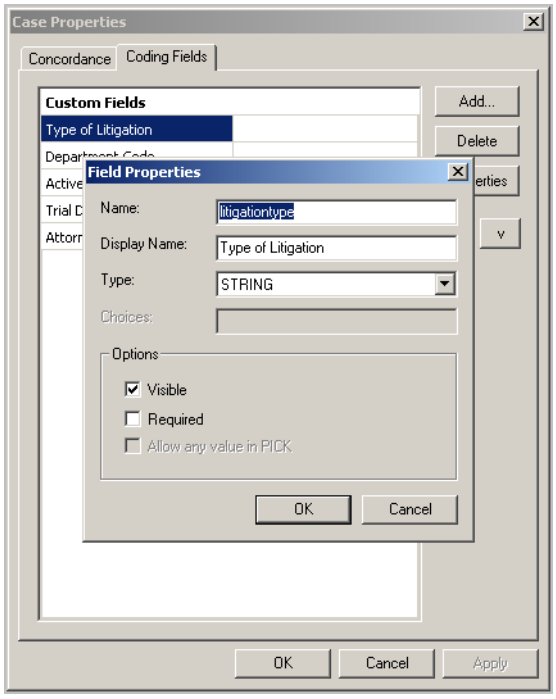


5 Click the **CODING FIELDS** tab.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.



6 Highlight a field and click **PROPERTIES**. The **Field Properties** page opens.



7 Make any changes necessary.

8 Save your changes.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Section 6: Testing

This section includes:

Sending a message to Concordance using AccuRoute Desktop (6-1)

Sending an End of load file using AccuRoute Desktop (6-7)

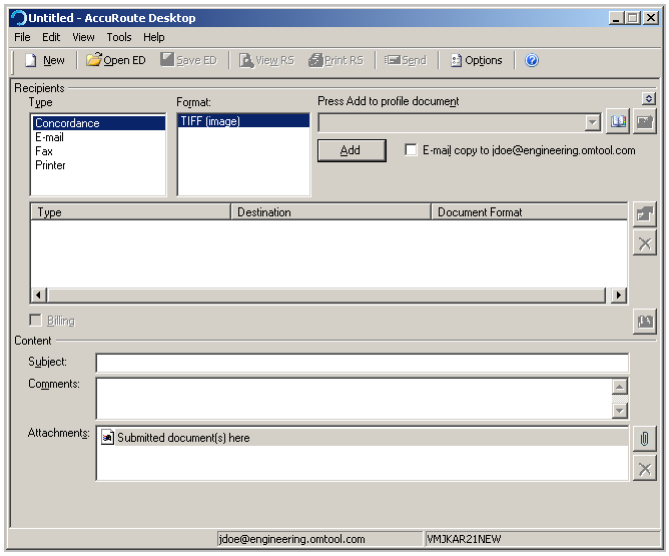
To test the installation and configuration of the Litigation Support connector, send a message to the Concordance recipient using AccuRoute Desktop.

For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to Related documentation on 1-2.

Sending a message to Concordance using AccuRoute Desktop

To send a message using AccuRoute Desktop:

1 Start AccuRoute Desktop. Log in if prompted.

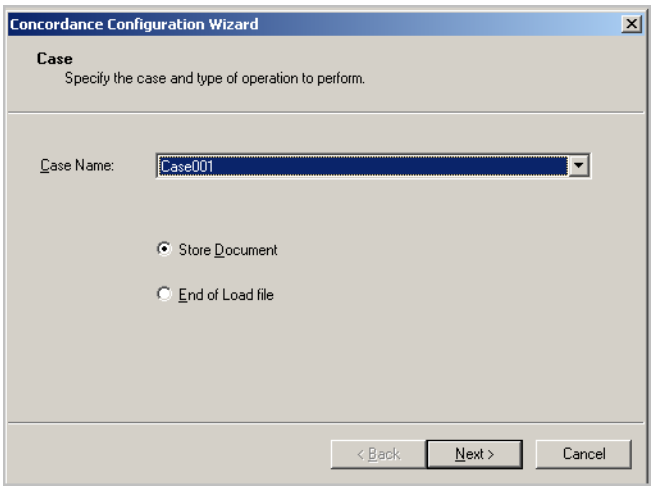


2 Select the destination type **CONCORDANCE** in the **RECIPIENTS TYPE** list.

3 Verify that the only available file format is TIFF (image).

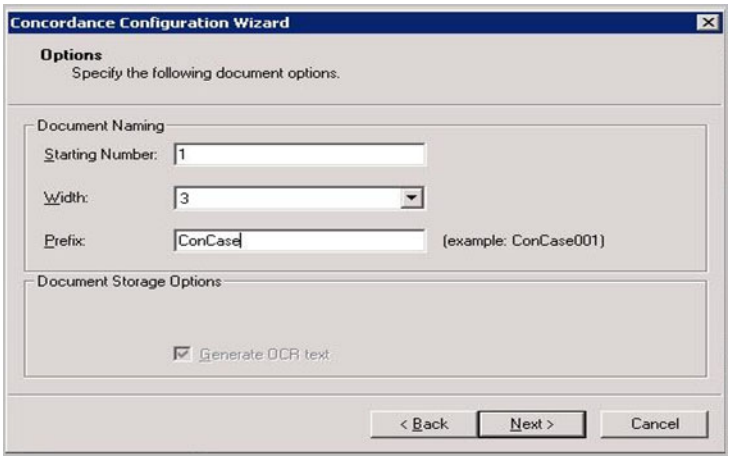
© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

4 Click **ADD**. The **Concordance Configuration Wizard** opens.



5 From the **CASE NAME** drop down, select a case.

6 Click **NEXT**. The **Options** page opens.



7 In the **STARTING NUMBER** text box enter a number or accept the default of 1.

In most cases, documents will be numbered starting with the specified number. If there is a document with a higher number already referenced in the load file, however, the starting number will begin at the next highest number.

8 In the **WIDTH** drop down select the document width. The document number width should not be changed till the case is closed as this may lead to issues with document naming.

Note The **Width** text box is greyed out if the beside **ALLOW END USER TO CHANGE DOCUMENT NUMBER WIDTH** option is not checked in the case.

9 In the **PREFIX** text box, enter a prefix. The Prefix can consist of alpha characters, numerical characters, or a mixture. The limits of this field are controlled by the file system.

Note If a value is specified in document prefix field, a prefix should always be specified and it should be the same till the case is closed.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

The Prefix and number fields are added to the file name during the Compose process. For example if the Prefix is ABCDE and the Width is set to five, the resulting file name will be ABCDE00001.tif. The starting number (in this example 00001) indicates the first individual file number of the single page files.

10 Optionally, in the **Document Storage Options** area, if the option is available, select **GENERATE OCR TEXT** (optional). Selecting this option will create OCR text files in addition to the single page TIF files. OCR text files are searchable when imported into Concordance. If this option is not selected, only the single page TIF files are created, and the document is not searchable within Concordance.

11 Click **NEXT**. The Coding Fields page opens.

12 Enter information for any custom user-defined fields. If a field is required (that is has an *), you must enter information for that field. Shown below are some examples of custom fields and their possible value.

String - If a custom user-defined field is defined as a string value field, you can enter alpha or numeric text.

Custom Fields	
Type of Litigation	Personal injury
Department Code	
Active Case?	
Trial Date	11/29/2006
Attorney	

Number - If a custom user-defined field is defined as a number field, you can only enter whole numbers.

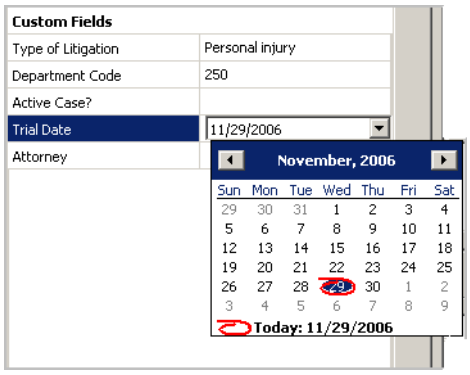
Custom Fields	
Type of Litigation	Personal injury
Department Code	250
Active Case?	
Trial Date	11/29/2006
Attorney	

Boolean - If a custom user-defined field is defined as a boolean field, select the check box if the answer is true, and clear the check box if the answer is false.

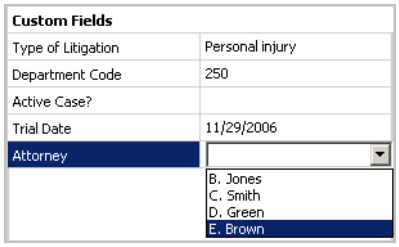
Custom Fields	
Type of Litigation	Personal injury
Department Code	250
Active Case?	☑
Trial Date	11/29/2006
Attorney	

Date - If a custom user-defined field is defined as a date field, the field defaults to today's date. To change the date, click on the date, click the down arrow, and select the correct date from the calendar that appears.

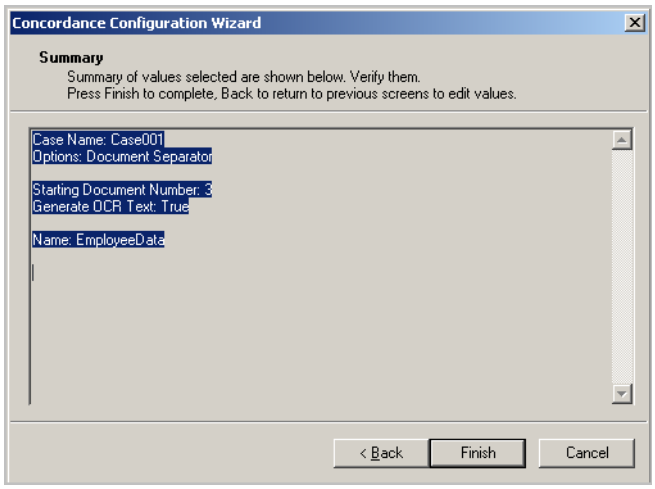
© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.



Pick - If a custom user-defined field is defined as a pick-list field, select a value from the drop-down list. Depending on your system's configuration, you may be able to enter your own values.

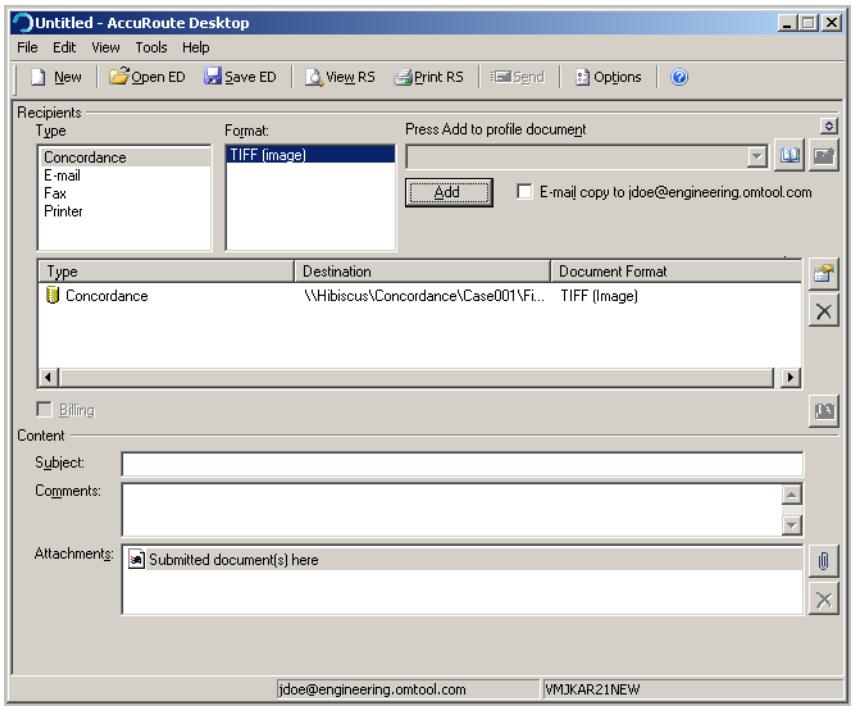


13 Click **NEXT**. A summary page opens listing all the information you have entered in the wizard.



14 Click **FINISH** to close the wizard. The Concordance destination appears in the message.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.



15 Add content to your message.

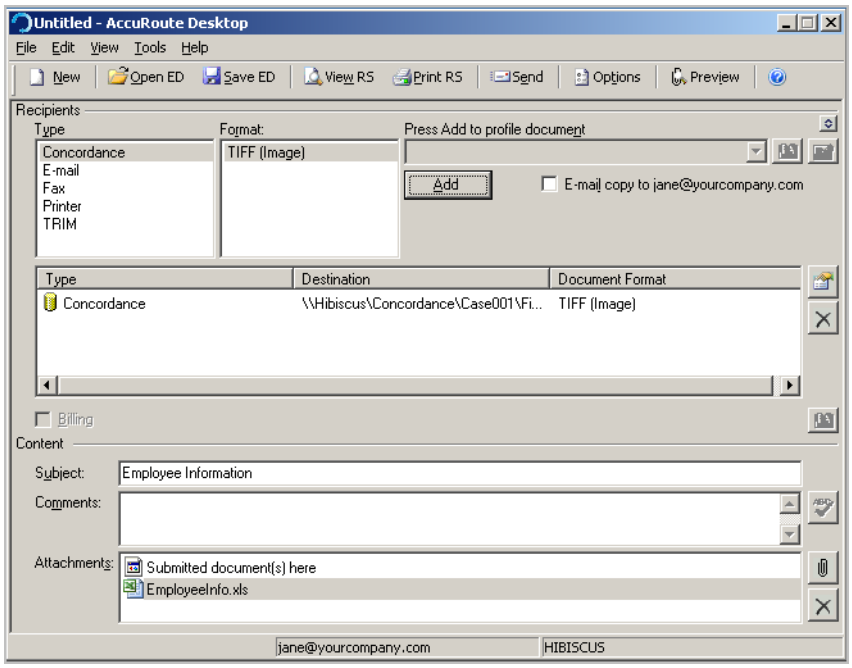
a Locate the **CONTENT** section at the bottom and type a subject and comments.

b Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:

FILE - Select this option to attach a file saved from your computer or network share. Go to the file, select it, and click **OPEN**. The file appears in the attachments list.

WEB DOCUMENT - Select this option to attach a web page from the Internet. Type the address of the web document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML), and click **OK**.

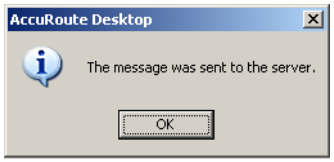
© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.



16 Do any of the following:

- **Send the message immediately** - To send the message, click **SEND** on the toolbar. (Your message must have at least one attachment.)
- **Save the message as an Embedded Directive** - Click **SAVE ED** on the toolbar, type a title for the Embedded Directive, and click **SAVE**.
- **Print a Routing Sheet that can be scanned with hard copy documents** - Save the message as an Embedded Directive. Then click **PRINT RS** on the toolbar. AccuRoute Desktop creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your network administrator. (Your message can include both electronic and hard copy documents.)

When you send a message and it is delivered to the AccuRoute sever for processing, you will see the following message.

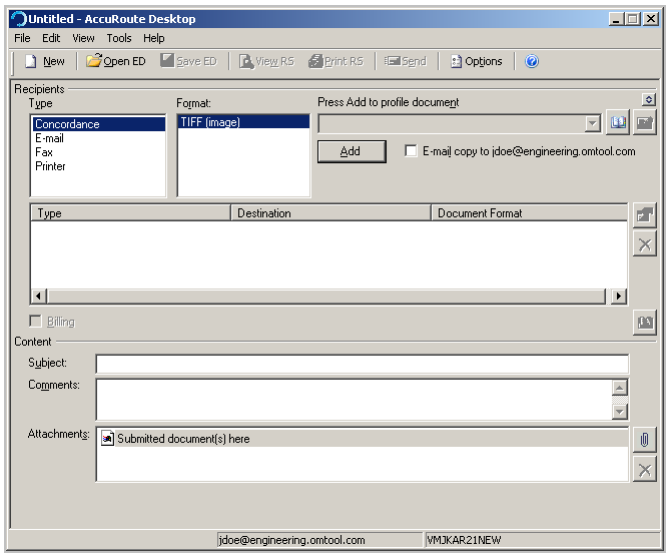


After the messages are processed by the server, the output TIFF and OCR text files are generated in the **Final** folder. The load file (*.opt and *.dat format) is generated in the **Working** folder.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Sending an End of load file using AccuRoute Desktop

1 Start AccuRoute Desktop. Log in if prompted.



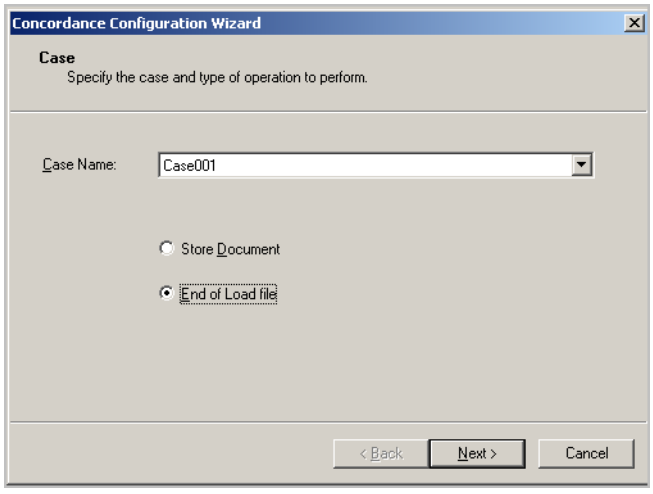
2 Select the destination type **CONCORDANCE** in the **RECIPIENTS TYPE** list.

3 Verify that the only available file format is TIFF (image).

4 Click **ADD**. The **Concordance Configuration Wizard** opens.

5 From the **CASE NAME** drop down, select a case.

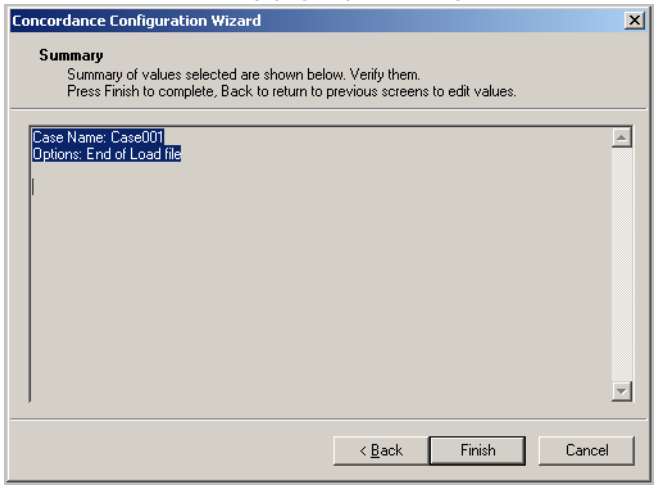
6 Select the **END OF LOAD FILE** option.



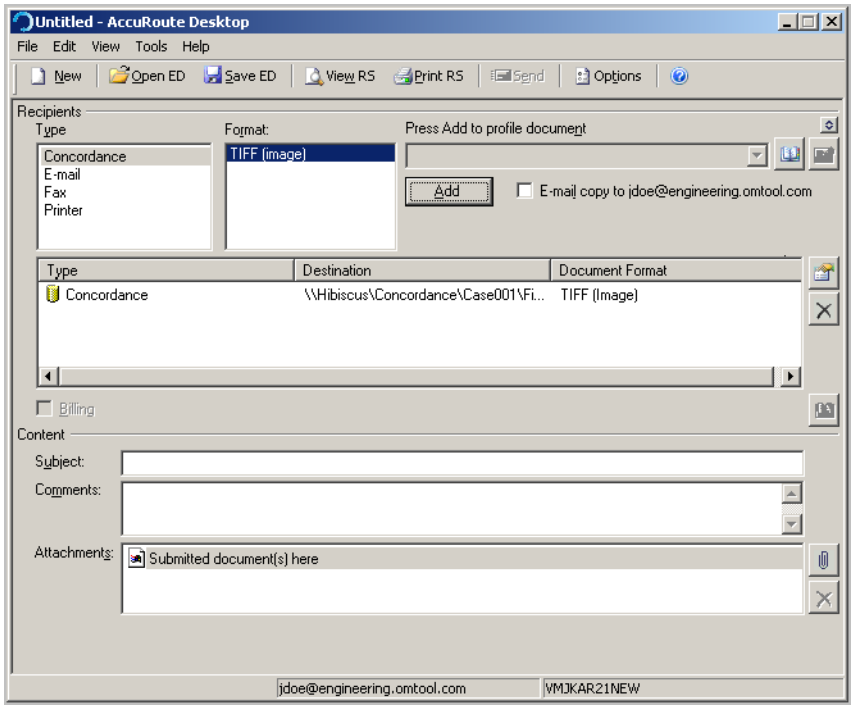
7 Click **NEXT**.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

8 Click **NEXT**. A summary page opens listing all the information you have entered in the wizard.



9 Click **FINISH** to close the wizard. The Concordance destination appears in the message.



10 Add content to your message.

a Locate the **CONTENT** section at the bottom and type a subject and comments.

b Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:

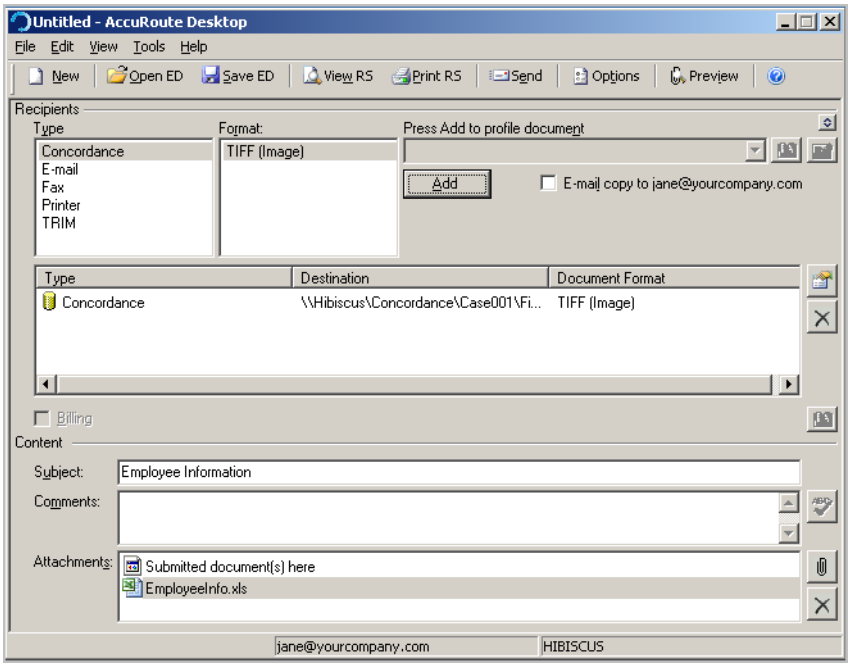
FILE - Select this option to attach a file saved from your computer or network share. Go to the file, select it, and click **OPEN**. The file appears in the attachments list.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

WEB DOCUMENT - Select this option to attach a web page from the Internet. Type the address of the web document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML).

Note Any content that you add to an End of Load File is not saved. An attachment is added only to send the message from the AccuRoute Desktop application.

Click **OK**.



11 Do any of the following:

- **Send the message immediately** - To send the message, click **SEND** on the toolbar. (Your message must have at least one attachment.)
- **Save the message as an Embedded Directive** - Click **SAVE ED** on the toolbar, type a title for the Embedded Directive, and click **SAVE**.
- **Print a Routing Sheet that can be scanned with hard copy documents** - Save the message as an Embedded Directive. Then click **PRINT RS** on the toolbar. AccuRoute Desktop creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your network administrator. (Your message can include both electronic and hard copy documents.)

12 Send end of load file Routing Sheets through the standard network scanning process.

After the messages are processed by the server, the load file (with MDB format) is generated in the **Working** folder and the *.opt and *.dat files are moved to **Final** folder from the **Working** folder.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Section 7: Troubleshooting

This section includes:

Detecting workflow issues (7-1)
Troubleshooting the delivery mechanism (7-1)
Troubleshooting the message on the Omtool server (7-2)
Troubleshooting the multifunction device (7-3)
Troubleshooting the client (7-4)
Routing sheets do not display Concordance destination (7-4)

Complete these procedures in the order they appear. If you cannot resolve the issue, contact Omtool.

Detecting workflow issues

After a document has been profiled to Litigation Support connector, the document should arrive at its destination momentarily, but can take up to several minutes when the server workload is high. If a document does not arrive at its destination within a reasonable period of time, begin troubleshooting the environment. Omtool recommends troubleshooting the workflow in reverse order because this is the easiest way to troubleshoot the setup on your own.

The easiest way to troubleshoot a workflow issue is to follow the document through the workflow in reverse order. When a document does not arrive at its destination, troubleshooting starts with Litigation Support connector, and then continues to the Omtool server, the device (if applicable), and then the client.

Continue to Troubleshooting the delivery mechanism.

Troubleshooting the delivery mechanism

When the Omtool server finishes processing a message, an outbound connector routes the message directly to its destination or passes the message to Litigation Support connector. Do some basic troubleshooting on the Litigation Support connector. For example, is the connector enabled? If the Litigation Support connector is functioning correctly, troubleshoot the message on the Omtool server.

Continue to Troubleshooting the message on the Omtool server.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Troubleshooting the message on the Omtool server

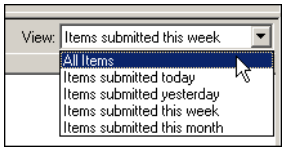
There are two important questions that can be resolved when troubleshooting a message on the Omtool server:

- Was the message submitted to the Omtool server?
- Assuming the message was submitted to the Omtool server, what caused the delivery failure? The state and status of the message, along with details in the message journal, provide some important clues.

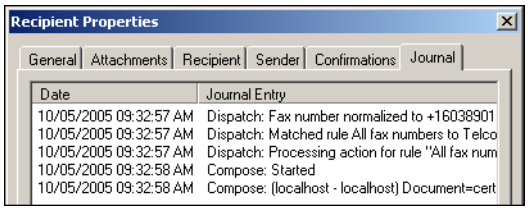
Start troubleshooting by trying to locate the message on the Omtool server.

To locate the message on the Omtool server:

1. Start the Administrator.
2. Go to **OMTOOL SERVER ADMINISTRATOR > [SERVERNAME] > MESSAGES**.
3. Look for the message in the In Process queue:
   a. Click **IN PROCESS**.
   b. View **ALL ITEMS**.



   c. Sort all items by the date submitted.
   d. Look for the message.
      - **Message found** - Double-click the message and then click the **JOURNAL** tab to view the message journal to determine the current state and status of the message. Then monitor the components and confirm that the message is moving through the processing queues on the Omtool server. If the Omtool server stops processing the message (for example, the message seems to be stuck in a processing queue), restart all the Omtool services.



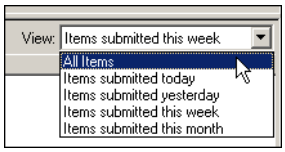
      - **Message not found** - Go to step 4 and look for the message in the History queue.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

4 Look for the message in the History queue:

a Click **HISTORY**.

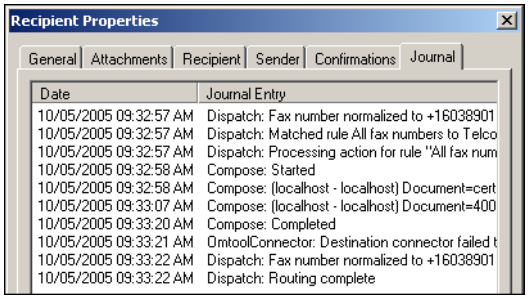
b View **ALL ITEMS**.



c Sort all items by the date submitted.

d Look for the message.

- **Message found** - Double-click the message and then click the **JOURNAL** tab to view the message journal to determine the cause of the failure.



If the message failed, correct the issue and send the message again. Contact Omtool if you are unable to resolve the issue. (Go to Omtool support and sales on the inside front cover.)

If the journal states that Omtool server delivered the message but it still has not arrived at its destination, this indicates that the Omtool server transferred the message to the Litigation Support connector successfully. Do some advanced troubleshooting on the Concordance Load Files folders to determine why the message is not being delivered to its destination. Contact Omtool if you are unable to resolve the issue. (Go to Omtool support and sales on the inside front cover.)

- **Message not found** - If the message is not found, the next step is to troubleshoot the multifunction device.

Continue to Troubleshooting the multifunction device.

Troubleshooting the multifunction device

After troubleshooting all other components in the workflow, troubleshoot the device. Consult the device manufacturer's documentation.

Continue to Troubleshooting the client.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Troubleshooting the client

If the device is working properly, try sending a message from the client to a recipient other than the Litigation Support connector. If you are able to send messages to recipients other than the Litigation Support connector and the Litigation Support connector is operating correctly, contact Omtool. (Go to Omtool support and sales on the inside front cover.)

Routing sheets do not display Concordance destination

Problem: When you create a routing sheet with **Concordance** as a recipient type, the routing sheet does not have the destination displayed.

Solution: The solution is to add the following variables `%PLUGIN_DESTINATION.1%` and `%PLUGIN_DESTINATION.2%`. These variables should be added to the following template files:

- BatchRoutingSheet.doc
- BatchRoutingSheet-Simple.OMTPL
- RoutingSheet-Simple.omtpl
- Routingsheet.doc

The template files are located in the **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\LANGUAGES\ENU\EMBEDDEDDIRECTIVES** directory of the system running the AccuRoute server.

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.