

Release Notes for AccuRoute® v3.01 Feature Packs

Product: AccuRoute 3.01

Release date: February 2011

Version 2182011

© 2011 by Omtool, Ltd. All Rights Reserved.

The Release Notes contain information on new features and enhancements for AccuRoute v3.01 Feature Packs.

AccuRoute v3.01 Feature Pack I

New in this release

New features in this release include:

Note New features are documented as new AccuRoute Server features (like new connector, or other features) followed by the new Omtool™ Client features.

AccuRoute Server features

Data Validation Enhancements

The data validation capabilities of the AccuRoute Server have been enhanced to support the addition of returning all data specified in a query to the associated properties of the job being processed. In addition to the server, the AccuRoute Desktop Client, the Image-In Queue, the AccuRoute Web Client and the Barcode Extractor have all been enhanced to support this feature for a more streamlined user experience.

In prior AccuRoute versions, the retrieved data was used only as a display property which the user could use to verify the value entered. For example, when the user adds a customer number the server will validate the data and retrieve the name of the validated customer and ask the user to confirm. But the retrieved data was not retained for future use.

The enhanced validation capabilities in this release provide the ability to both retrieve multiple data elements during validation and to add the retrieved data to the metadata of the job being processed. The modified metadata can be used in the same manner as data submitted to the AccuRoute Server with a job, or when entered by an user.

With the expanded capability, the AccuRoute Administrator can configure the data validation capability of the AccuRoute Server to retrieve data from an SQL data source that is related to the data being validated, and to use that data throughout the system.

For instructions on how to configure Data Validation, refer to the [AccuRoute v3.01 Feature Pack I Installation and Configuration Guide](#).

Document Action Log

The Document Action Log feature allows you to record and log into an SQL table, all information related to document/record access by a user using the AccuRoute Web Client. The SQL table is created by default in the AccuRoute Archive Database and is named "ActionLog".

Historically, user access to documents via the AccuRoute Web Client is captured through the job activity logs associated with individual jobs. However, limitations with internal format of data storage meant that this data was not easily accessible. The Document Action Log feature now allows the Administrators to use familiar reporting tools to monitor and report on user/document activity.

This is particularly useful to companies within the Healthcare environment where Administrators are routinely required to trace users who have accessed a specific document or set of documents, as well as all the documents a specific user may have accessed, for HIPPA compliance reasons.

The SQL table ActionLog, can be moved to any location accessible by the AccuRoute Server. The management of the schema should be done by the Omtool™ Server Administrator via normal SQL database table management. (In this sense, its management is similar to management of the Billing/CostRecovery table.)

Note The ActionLog table is updated only when a user searches for or views configured Volume Lists using the AccuRoute Web Client v3.02. As the user selects to view (either implicitly or explicitly) a document contained in a Volume List then an entry is made into the ActionLog table.

For instructions on how to configure Document Action Log, refer to the [AccuRoute v3.01 Feature Pack I Installation and Configuration Guide](#).

PDF Forms Generator

The PDF Forms Generator is a template engine similar to the OMTPL and Microsoft® Word template engines. Any job that has a PDF Form marked as a template is processed by the PDF Forms Generator. The PDF Forms Generator handles template substitution and replaces all the standard template tags or OPath properties with properties from the job. If there is no substitution value then the tag is replaced with an empty string.

If a PDF Form is attached to a job as a regular message attachment it is not processed by the PDF Forms Generator.

Note Only interactive forms created by Acrobat are supported. XFA forms created by Adobe LiveCycle Designer are not supported. If the PDF Form Engine tries to process an XFA PDF, it will fail the job and return an error stating the XFA format is not supported.

The documents processed by the PDF Forms Generator remain editable PDF Forms. These forms are not flattened, so if the file is opened by a PDF Reader the user can edit, copy and paste, and print the form fields.

Important The Form fields cannot be resized to fit the replaced data. If the content that is being replaced is too large for the field the entire value may not be visible.

The following PDF template cover pages: OmtoolCoverpage.pdf and RoutingSheet.pdf are located in the following folder: \\[INSTALLDIR]/SAMPLES/PDF FORMS

For instructions on how to configure PDF Forms Generator, refer to the [AccuRoute v3.01 Feature Pack 1 Installation and Configuration Guide](#).

Volume List Extensions

The AccuRoute Server has been enhanced to support Volume Lists for the following repositories in addition to ObjectArchive™.

- Microsoft® SharePoint®
- Autonomy iManage WorkSite
- FileShare

This enhancement allows the Administrator to create custom document processing workflows, or use Omtool packaged workflows to send documents to the repositories.

The metadata search capability is enabled and works as before. Users can perform a search in the AccuRoute Web Client and pull back matching documents seamlessly without regard as to where it is stored.

Important Only those jobs that have been processed by the AccuRoute Server and use the indices defined for the Volume are searchable from the AccuRoute Web Client.

For instructions on how to configure Volume List Extensions, refer to the [AccuRoute v3.01 Feature Pack 1 Installation and Configuration Guide](#).

Volume List Restrictions

The Volume List Restrictions feature allows the Omtool Server Administrator to restrict user access to certain types of documents in a Volume. This is useful in situations where only designated users should be able to access specific documents. For example, companies dealing with health care records frequently have specific patient forms or records that users must be authorized to access.

In prior AccuRoute versions, access to documents stored in a volume was based solely on the Active Directory Group membership criteria. Under this approach, users could access all or none of the documents stored in a volume.

By configuring Volume List Restrictions, the Administrator can restrict the actual documents that a user can retrieve and view. Moreover, since the AccuRoute Web Client search will return restricted and not all available documents, companies are no longer required to purchase or maintain multiple volumes for storing different categories of data. The result is easier data maintenance, efficient use of storage space and optimized search results.

Note Currently, Volume List restriction is applicable to AccuRoute Web Client searching only. It is not applicable to searches from the Image-In Queue client.

For instructions on how to configure Volume List Restrictions, refer to the [AccuRoute v3.01 Feature Pack I Installation and Configuration Guide](#).

Omtool Client features

AccuRoute Desktop Client v3.03

AccuRoute Desktop Client is an intelligent client side application that resembles a desktop email client. Using AccuRoute Desktop, users can create Embedded Directives and Routing Sheets and use them to streamline their common document routing practices.

AccuRoute Web Client v3.02

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

Note AccuRoute Web Client is now cluster aware. For instructions on how to configure the AccuRoute Web Client for failover, consult the refer to the [AccuRoute v3.01 Feature Pack I Installation and Configuration Guide](#).

Image-In Acquisition Client v3.0.2.0

Image-In Acquisition Client is used to scan hard copy documents for use in AccuRoute products such as Image-In Queue.

Image-In Queue v3.02

Image-In Queue provides a viable digital alternative to traditional paper based document management and routing systems. It can be deployed as a standalone configuration along with the Image-In Acquisition client or as a component of an enterprise electronic document delivery and management system.

Image-In™ Connect v1.00

Image-In Connect is an extensive and powerful application that extends AccuRoute to integrate with various line of business applications. It uses a powerful metadata gathering technique to collect metadata from the external application it integrates with. This captured metadata can be used to generate a Routing Sheet which can then be used to route documents to repositories like Microsoft® SharePoint® or ObjectArchive™ where the captured document is stored using the values of the Routing Sheet as indices.

How Image-In Connect works

The following example will give you an idea as to how Image-In Connect works. In this example, the Omtool Administrator needs to integrate the AccuRoute environment with a Human Resource application. This application contains employee demographic information such as employee name, date of birth, email and or fax number, social security number etc. The purpose of the integration is to collect the employee metadata and use the information to create a Routing Sheet, and then use the Routing Sheet to route documents to a repository using the metadata values as indices.

The integration is easily configured using Image-In Connect where the Administrator simply creates an “Appspace” for the application (with mappings for all the demographic information fields as Xmodel elements) and installs the Appspace on the AccuRoute Server.

Note An AppSpace can be thought of as a document container for RegWins. A RegWin is a set of tabs in the AppSpace that allow the Omtool Server Administrator to associate controls on a Windows Application UI in order for the metadata to be captured.

Thereafter, whenever a user brings up the application, the user is presented an Image-In Connect icon in the title bar. When the user activates the icon, Image-In Connect opens, presenting the user with one or several of the Image-In Connect options. (The list of options the user will see, will depend on his configuration). As soon as the user selects the “Create Routing Sheet” option, a Routing Sheet is generated using the metadata from the current contents of the fields that are mapped as Xmodel elements.

Description of each of the Image-In Connect features

Create Routing Sheet

When the user selects the “Create Routing Sheet” option, a Routing Sheet is automatically generated using the metadata from the current contents of the fields that are mapped in the external application. The Routing Sheet can be used for capturing and routing documents to the final destination using the values as indices. Since the Routing Sheet is automatically generated, this process does not require any data entry on the users part. Administrators can configure, to prompt the user for a relevant Routing Sheet name or users can use the default name if desired.

Create Scan Reservation

When the user selects the “Create Scan Reservation” option, an Embedded Directive is automatically generated using the current contents of the fields that are mapped for collecting metadata. Once you save this, the Embedded Directive can be made available on a multifunction peripherals (MFPs) for use.

This method of creating a scan reservation does not require any data entry on the users part. Additionally, the users do not have to save or print a Routing Sheet before walking up to a MFP to scan their document.

This feature provides the same basic capabilities as “Create Routing Sheet” option. However instead of generating a routing sheet, the system creates an Embedded Directive and make it available on a multi-function device.

View Linked Documents

This feature allows the end user in an external application to search for and view all documents previously associated with a field mapped for metadata collection. It invokes the AccuRoute Web Client’s direct search capability where the mapped field is used as the search criteria for finding related documents.

For example, if the end user is in the external application selects the View linked Documents option, and if the employee id is mapped field, then the user will be able to view all documents that were archived via the AccuRoute Web Client that are associated with the employee ID.

Open in AccuRoute Desktop

In cases where more complicated or modified processing is required for document routing, the user will have the option to open the Routing Sheet in the AccuRoute Desktop Client and use of its additional capabilities. When the AccuRoute Desktop Client opens, the metadata currently visible on the external application is automatically transferred and converted into a Routing Sheet.

Upload Documents

When the user selects this option and if the documents being captured already exist electronically, the user has the option to upload the documents directly to the AccuRoute Server for processing, bypassing the scanning step.

Link to Queue

The Link to Queue feature allows the user to apply the metadata from the external application to a job listed in the External Applications folder of the Image-In Queue application.

When the user selects the “Link to Queue” option in Image-In Connect, the Omtool Workflow Integration Application page opens listing all jobs in the External Applications folder. The user can select a job, preview the associated document and click OK to apply the metadata from the external application to the job. The job moves from the External Applications folder of Image-In Queue application and matches the queue workflow rules to its final destination.

For information on how to install and configure the Image-In Connect Client, consult the [Image-In Connect Installation Guide](#). For instructions on how to use Image-In Connect within an external application, consult the [Image-In Queue Quick Start Guides](#).