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# AccuRoute® v3.0I Feature Pack I Installation and Configuration Guide

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# Section I: Overview

The AccuRoute v3.01 Feature Pack v1 Installation and Configuration Guide contains instructions on installing and configuring AccuRoute Feature Pack v1. The guide is based off AccuRoute, an enterprise application and it is written for System Administrators with detailed knowledge of Microsoft® Windows operating system and the LAN.

## New in this Release

New AccuRoute Server features in this release include:

- ❑ **AccuRoute Connector for Volume List** - This connector replaces the AccuRoute Connector for ObjectArchive™. For information on creating and configuring this connector, see [Creating an AccuRoute Connector for Volume List \(4-10\)](#).
- ❑ **Data Validation and Pullback** - The data validation capabilities of the AccuRoute Server are expanded and supports the addition of returned data to the properties of the job being processed. For more information, see [Configuring Data Validation \(4-1\)](#).
- ❑ **Document Action Log** - This feature allows you to track user actions when documents are viewed and accessed from the AccuRoute Web Client. For more information, see [Configuring Document Action Log \(4-3\)](#).
- ❑ **Image-In™ Connect node** - This node in the Omtool Server Administrator console allows the Administrator to configure the AccuRoute Server so that the Image-In Connect application can integrate seamlessly with any line of business application.  
  
For more information on Image-In Connect, contact [Omtool Sales](#).
- ❑ **PDF Forms Generator** - The PDF Forms Generator is a new template composer for PDF Forms. For more information, see [Configuring Forms to Use the PDF Forms Generator \(4-5\)](#).
- ❑ **Volume List Extensions** - Volume Lists can store documents into any configurable DMS like Microsoft® SharePoint® and Autonomy iManage Interwoven in addition to ObjectArchive. For more information, see [Configuring Volume List Extensions \(4-7\)](#).
- ❑ **Volume List Restrictions** - You can restrict user access to certain types of documents in a Volume List by configuring restrictions. Restricting user access is useful for companies requiring that only designated users should have access to specific documents in a Volume List. For configuring restrictions, see [Configuring Volume List Restrictions \(4-13\)](#).
- ❑ New and enhanced Omtool Clients in this release include -
  - ▶ **AccuRoute Desktop Client v3.03** - Allows users to create Embedded Directives and Routing Sheets and use them to streamline their common document routing practices.

- ▶ AccuRoute Web Client v3.02 - An intranet-based web application, that provides network users a convenient method of creating document distributions (Embedded Directives), generating Routing Sheets, and sending messages.

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**Note** AccuRoute Web Client is now cluster aware. For configuration instructions, see [Configuring the AccuRoute Web Client for Failover \(6-1\)](#).

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- ▶ Image-In Acquisition Client v3.0.2.0 - Allows scanning of documents using a TWAIN compliant scanner and then organizing and routing the document to Image-In Queue for further processing.
- ▶ Image-In Queue v3.02 - Provides a viable digital alternative to traditional paper based document management and routing systems.
- ▶ Image-In Connect v1.00 - Allows the AccuRoute Server to integrate with nearly any line of business application.

## Related Documentation

- ❑ AccuRoute Server Install Guide - <http://www.omtool.com/documentation/AccuRoute/v3.01/Server/AccuRouteV3.01ServerInstallConfigureGuide.pdf>
- ❑ AccuRoute v3.01 Patch Roll up I Readme - <http://www.omtool.com/documentation/Readmes/AccuRouteV301RollUpIReadme.htm>
- ❑ Omtool Server Administrator Help - <http://www.omtool.com/documentation/omtoolserver/v37/admin/index.htm>
- ❑ Modems 2.3.1 Readme - [Modem Server v2.3.1 Service Pack Readme](#).

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**Note** This is required if you are using modem boards with AccuRoute.

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- ❑ AccuRoute Desktop Client Installation Guide - <http://www.omtool.com/documentation/AccuRoute/v3.01/AccuRouteDesktop/AccuRouteDesktopInstallGuide.pdf>
- ❑ AccuRoute Desktop Client User Guide - <http://www.omtool.com/documentation/AccuRoute/v3.01/AccuRouteDesktop/AccuRouteDesktopUserGuide.pdf>
- ❑ AccuRoute Web Client Installation Guide - <http://www.omtool.com/documentation/AccuRoute/v3.01/AccuRouteWebClient/AccuRouteWebClientV3.01InstallConfigurationGuide.pdf>
- ❑ AccuRoute Web Client User Guide - <http://www.omtool.com/documentation/AccuRoute/v3.01/AccuRouteWebClient/UserHelp/WebHelp/accuroutewebclient.htm>
- ❑ Image-In Queue User Guide - <http://www.omtool.com/documentation/AccuRoute/v3.01/IIQ/UserHelp/WebHelp/IIQHelp.htm>

- ❑ Image-In Acquisition Client User Guide - <http://www.omtool.com/documentation/OmtoolHealthCare/ImageInAcquisition/v3.0.2/IIAInstallUserGuide.pdf>
- ❑ Image-In Connect Installation Guide - <http://www.omtool.com/documentation/AccuRoute/v3.01/FP1/ImageInConnect/IIConnectInstallGuide.pdf>
- ❑ Image-In Connect Quick Start Guides - <http://www.omtool.com/documentation/AccuRoute/v3.01/FP1/ImageInConnect/Image-InConnectQuickStartGuides.zip>





## Section 2: Requirements

This section includes:

[AccuRoute Server Requirements](#) (2-1)

[Other installation Requirements](#) (2-1)

### AccuRoute Server Requirements

The system where you will install AccuRoute v3.01 Feature Pack v1 must meet the following minimum requirement:

- AccuRoute Server v3.01 or AccuRoute Server v3.01 Rollup 1

For AccuRoute Server installation and configuration instructions, consult the [AccuRoute Server Installation and Integration Guide](#).

### Other installation Requirements

- Modem Server v2.3.1 Service Pack

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**Note** This is required only if you are using modem boards with AccuRoute. For installation details, consult the [Modem Server v2.3.1 Service Pack Readme](#).

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Section 2: Requirements

## Section 3: Installation

This section includes:

[Downloading the AccuRoute v3.01 Feature Pack I Update](#) (3-1)

[Installing the AccuRoute v3.01 Feature Pack I](#) (3-2)

AccuRoute v3.01 Feature Pack I will install updated files for the AccuRoute Server in addition to the setup files for the following Omtool Clients (setup files are located in the **OMTOOL SERVER\CLIENTS** directory):

- AccuRoute Desktop Client v3.03
- AccuRoute Web Client v3.02
- Image-In Acquisition Client v3.0.2.0
- Image-In Queue v3.02
- Image-In Connect v1.00

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*Note* AccuRoute Desktop Client v2.2.3 or earlier versions are not supported with Feature Pack I since AccuRoute Desktop v 2.2.3 or earlier versions cannot send or save attachments on systems running Windows 2008 IIS7.

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You must install the AccuRoute v3.01 Feature Pack I Update on the AccuRoute Server system and any other system running any of the Remote Components and Remote AccuRoute Connectors listed below.

- Remote Administrator
- Remote ObjectArchive
- Remote Composer
- Remote Modem Server
- Remote Embedded Directive Manager
- Remote AccuRoute Connector for DMS Libraries
- Remote AccuRoute Intelligent Device Client

## Downloading the AccuRoute v3.01 Feature Pack I Update

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*Important* Before you can download the update, you must contact Omtool Customer Service and request for login access to download AccuRoute v3.01 Feature Pack I.

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**To download the AccuRoute v3.01 Feature Pack I Update:**

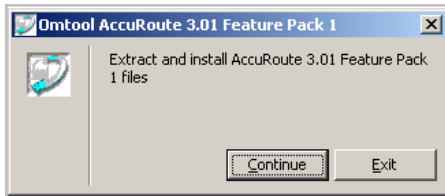
- 1 Open Internet Explorer browser and go to <http://www.omtool.com/support>.
- 2 Log in using the customer number you obtained from Omtool Customer Service.

- 3 Locate the module AccuRoute v3.01 Feature Pack I Update 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.

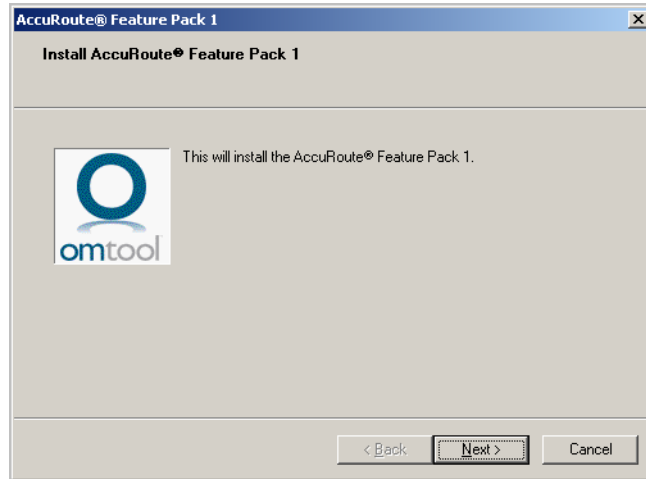
## Installing the AccuRoute v3.01 Feature Pack I

### To install the AccuRoute v3.01 Feature Pack I:

- 1 Log in to the AccuRoute Server system using the Omtool Service Account.
- 2 Go to the location where you saved **ARS3.01-FP1.EXE** file.
- 3 Double click the executable. The **Omtool AccuRoute 3.01 Feature Pack I** page opens prompting you to extract and install the update.



- 4 Click **CONTINUE** to extract the files to a temporary location on your system. When extraction is complete, the **Install AccuRoute Feature Pack I** page opens.

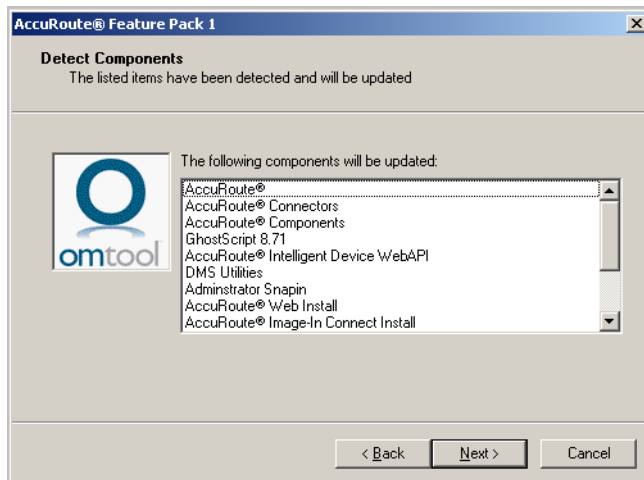


- 5 Click **NEXT**. The **License Agreement** page opens.

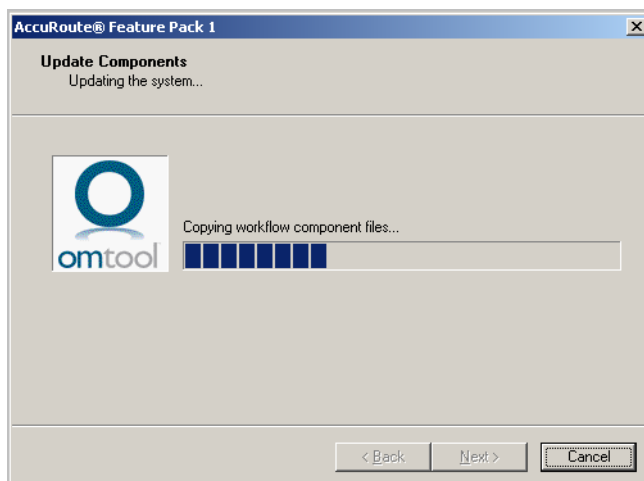
- 6 Read the license agreement and if you agree, check the box beside the **I HAVE READ THE LICENSE TERMS** option.



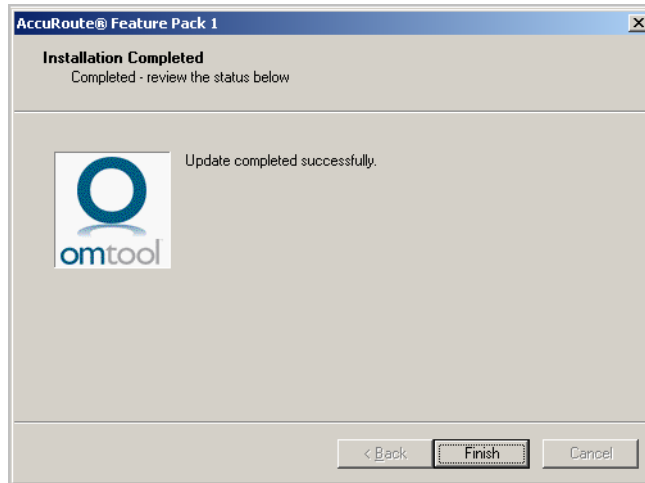
- 7 Click **NEXT**. The **Detect Components** page opens listing all the components that will be updated.



- 8 Click **NEXT** to install the update. A progress bar shows the status of the installation.



When installation is complete you see the **Installation Completed** page.



- 9 Click **FINISH** to exit the wizard.

# Section 4: Configuring the AccuRoute Server

This section contains instructions on how to configure the AccuRoute Server for Feature Pack I release.

[Configuring Data Validation](#) (4-1)

[Configuring Document Action Log](#) (4-3)

[Image-In Connect](#) (4-5)

[Configuring Forms to Use the PDF Forms Generator](#) (4-5)

[Configuring Volume List Extensions](#) (4-7)

[Creating an AccuRoute Connector for Volume List](#) (4-10)

[Configuring Volume List Restrictions](#) (4-13)

## Configuring Data Validation

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.

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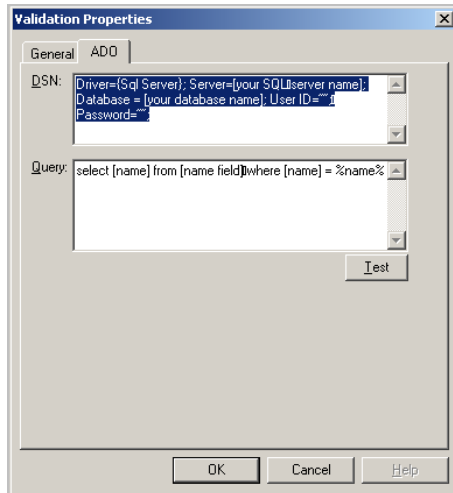
**Note** Property Dictionary Items (PDI) must be created for all fields that need to be queried for data collection. For information on how to create Property Dictionary Items, see the [Configuring Message Property](#) topic in the Omtool Server Help.

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### To configure data validation:

- 1 Open the Omtool Server Administrator console.
- 2 In the console tree, expand the Omtool Server.
- 3 Select **CONFIGURATION** and right click **VALIDATORS**.
- 4 From the drop down menu, select **NEW > VALIDATOR**. The **Select Validation Type** page opens.
- 5 Select **ADO VALIDATOR** from the **Type** drop down list.
- 6 Click **OK**. The **Validation Properties** page opens.
- 7 In the **NAME** text box, enter a descriptive name.
- 8 In the **DESCRIPTION** text box, enter a brief description.
- 9 Verify that the **MANDATORY: USER MUST SPECIFY A VALUE** option is selected.

- I0 Verify that the **USER MUST CONFIRM SUCCESSFUL VALIDATIONS** check box is selected.
- I1 Click the **ADO** tab.



- I2 In the **DSN** text box, enter the data source name of the database required for data validation. The DSN string should be in the following syntax:  

```
Driver={Sql Server}; Server=[your SQL server name]; Database = [name of the database being used for data validation]; User ID=''; Password='';
```
- I3 In the **QUERY** text box, enter your query for data validation. For help with the syntax of your query, refer to the following table. The table shows the breakdown of a query for data validation based on the two property fields returning data: Matter and VoucherID.

**Table 4-A: Table showing data validation query breakdown**

Query syntax breakdown	Description
SELECT	The 'select' items are what is returned based on the given property value.
Matter as [{Matter}],	The first item is the column in the sql table and then PDI name for the data being returned. Note: PDI = Property Dictionary Item. For instructions on how to create create Property Dictionary Items, see the <a href="#">Configuring Message Property</a> topic in the Omtool Server Help.
VoucherID as [{VoucherID}]	The first item is the column in the sql table and then PDI name for the data being returned. Note: PDI = Property Dictionary Item.
FROM InvoiceTable	This is the SQL table that the search will be in.
WHERE Client = '%Client%'	This is the field that is used for validating against a given property value.

Using the guidelines above, your query for Matter and Voucher ID by providing the Client value will look like this.

```
SELECT Matter as [{Matter}],VoucherID as [{VoucherID}] FROM InvoiceTable WHERE Client='%Client%'
```



---

**Important** This will require a Database with a table configured with columns of Matter and VoucherID.

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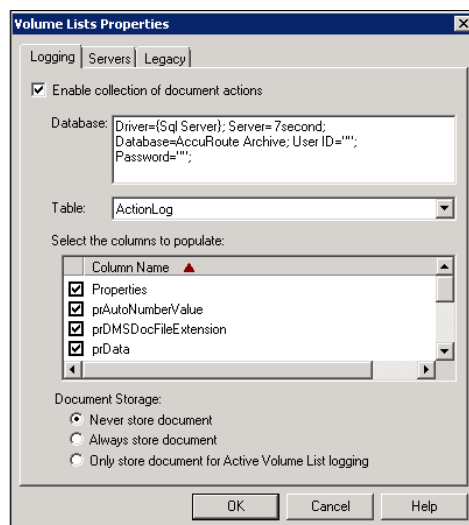
- 14 Click **TEST** to test the validator.
- 15 Click **OK** to create the validator.

## Configuring 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 an user using the AccuRoute Web Client. The SQL table is created by default in the AccuRoute Archive Database and is named "ActionLog".

### To configure Document Action Log:

- 1 Open the Omtool Server Administrator console.
- 2 In the console tree, expand the Omtool Server.
- 3 Right click the **VOLUME LISTS** node to open the **Properties** page.
- 4 A new tab, **Logging**, has been added to manage the database connection to the document action log table.
- 5 Enable the Data Action Log feature by checking the box beside the **ENABLE COLLECTION OF DOCUMENT ACTIONS** option and verifying that the ActionLog table is selected in the **TABLE** drop down menu.



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**Note** By default, the Data Action Log feature is enabled. You can disable it if you do not require to log document access.

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- 6** In the **Select the columns to populate** section, clear the columns which should not be populated in the table (you can clear only the following columns - [prDMSDocFileExtension](#) and [prData](#)). By default all the columns are selected.

**Note** Note: All columns you do not select will not have data entered for them. They must be null or have the defaults configured in the table itself.

You must always have the following columns selected:

**Table 4-B: Required Columns for Configuring Document Action Log table**

Columns	Supported Value
Properties	Value = NTEXT. The entire set of properties for the audit log are stored as an XML blob.
prAutoNumberValue	Value = Integer, Identity This is used to guarantee ordering as date created is not precise enough.
prDateCreated	Value = Date/ Time The date and the time the entry was made
prGUID	Value = NVARCHAR and is limited to 36 characters. This is the unique identifier for this entry.
prLogSource	Value = NVARCHAR and is limited to 12 characters. This is the identifier for the source of the entry from AccuRoute Web Client.
prLogType	Value = NVARCHAR and is limited to 12 characters. This is the Type of entry being made. SRCH:AVIEW Log entry was made when the user searched and the first item was auto-selected SRCH:VIEW Log entry was made when the user searches and they manually selected the document to view
prServerName	Value = NVARCHAR This is the name or IP Address of the system from where the user logged into the AccuRoute Web Client.
prUserName	Value = NVARCHAR This is the name of the user (domain/user in most cases) for whom the e log entry should be made.

If you do not select these columns, you will see an error message indicating that the minimum requirements have not been met.

- 7 Optionally, select the following columns.

**Table 4-C: Optional Columns for Configuring Document Action Log table**

Columns	Supported Value
prData	Value = NTEXT. This is a BASE64 encoded version of the document viewed and it will be updated if the Document Storage option is appropriate.
prDMSDocFileExtension	Value = NVARCHAR This is the type of file contained in prData (for example, PDF).

*Note* You can also specify any other columns that should be populated by providing the column names as an OPath,

- 8 Click **OK** to save your changes.

## Image-In Connect

Image-In-Connect is an extensive and powerful application that allows AccuRoute to integrate seamlessly with any line of business application. It uses a powerful metadata gathering technique to collect metadata from the external application it integrates with. This captured metadata can be used, for example, to generate a Routing Sheet. This can be used to route documents to repositories like MS SharePoint or ObjectArchive where the captured document is stored using the values of the Routing Sheet as indices.

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](#).

## Configuring Forms to Use the PDF Forms Generator

The PDF Forms Generator is a template engine similar to the OMTPL and MS Word template engines. Any job that has a PDF Form marked as a template is processed by the PDF Forms Generator.

## Using a PDF Form as a Cover Page

### To use a PDF Form as a cover page:

- 1 Create the PDF Form. Alternately, copy the OmtoolCoverpage.pdf located in the following folder:  
**\\[INSTALLDIR]\SAMPLES\PDF FORMS**
- 2 Add the form to the **<SERVERINSTALL>\LANGUAGES<LANGUAGE>\COVERPAGES** folder.

## Using a PDF Form as a Routing Sheet

### To use a PDF Form as a Routing Sheet:

- 1 Create the PDF Form. Alternately, copy the sample PDF Form and the RoutingSheet.pdf located in the following folder: **\\[INSTALLDIR]\SAMPLES\PDF FORMS**
- 2 Add the form to the **<SERVERINSTALL>\LANGUAGES<LANGUAGE>\EMBEDDEDIRECTIVES** folder.
- 3 Create a **.wtx** file and place it in the following folder with the same file name of the routing sheet that it is referring to:

**<SERVERINSTALL>\LANGUAGES<LANGUAGE>\EMBEDDEDIRECTIVES**

The only thing that will be contained in the wtx file is the name of the cover page. This is the name that shows up when a cover page is selected in the AccuRoute Desktop Client.

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*Note* For information on wtx files and how to create them, refer to the following topics in the Omtool Server Administrator Help: [About notification message templates](#) and [Guidelines for creating and modifying a routing sheet templates](#).

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- 4 Open the AccuRoute Desktop Client application and select the PDF Form.  
Any field with **%OMEDID\_BARCODE%** will be converted into a barcode field. The barcode is scaled to fit the dimensions of the field. It is recommended that you design the PDF Form in such a way as to ensure that the barcode field is not too small or has odd dimensions that would cause failures when trying to read the barcode.

## Using a PDF Form with Filescan Control Files

To create a PDF Form with a Filescan control file, create an AccuRoute Connector for Filescan. Then create a filescan control file with the keyword **#ATTACHFLAGS** which has the value of **SUBSTITITE**. Using this control file, all attachments with the correct document extensions will be treated like a template (coverpage) where the job properties will be substituted.

### To configure a PDF Form with a Filescan control file:

- 1 Create an AccuRoute Connector for Filescan following the instructions below:

- 2 In the Omtool Server Administrator console, click **CONNECTORS > NEW ACCURROUTE CONNECTOR FOR > FILESCAN**. The **License** page opens.
- 3 Enter a valid license and click **NEXT**. The **Server Address** page.
- 4 Click **NEXT**. Alternately, if you want the connector to run on a remote server, click Remote Server and enter the server name. Click **NEXT**. The **Display Name** page opens.
- 5 Enter a descriptive name and click **NEXT**. You are prompted to choose the folder to scan.
- 6 Click **BROWSE**. Navigate and select the folder. You can select additional folders to scan after you have created and configured this connector.
- 7 Click **NEXT**. The connector is configured and added. The **Congratulations** page opens.
- 8 Click **FINISH**. The new Filescan connector is listed in the details pane.

#### To create a Filescan control file using the #ATTACHFLAGS keyword:

- 1 Create a control file and place it in the filescan folder.
- 2 Use a text editor to create control file.

The following keywords should be included in the control file. Enter a pound sign (#) before each keyword as shown below.

```
#SENDER_EMAIL user1@xyz.com
#SENDER_NAME Jane Doe
#DESTINATION email user2@abc.net
#RECIP_EMAIL user@abc.com
#ATTACHMENT C:\Users\user1\Desktop\eventvwr.pdf
#ATTACHFLAGS SUBSTITUTE
```

---

*Note* Attachments marked with SUBSTITUTE variable must be a DOC, RTF, OMTPL or PDF or you will get a Compose failure error.

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- 3 Save the control file as a text file with a `.control` extension for ASCII files or a `.controlu` extension for unicode files.

For more information on creating Filescan control files and list of control file keywords, refer to the following topics in the Omtool Server Administrator Help: [Guidelines for creating control files](#) and [List of control file keywords](#).

## Configuring Volume List Extensions

The AccuRoute Server has been enhanced to support Volume Lists for repositories other than ObjectArchive. Configuring Volume List Extensions involve the following:

- **Creating a Volume List**

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**Note** A valid license is required to create a Volume List. For information on how to create a Volume List, see [Creating a Volume List, 4-8](#).

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- Creating an AccuRoute Connector for Volume List
- Configuring Queues properties

## Creating a Volume List

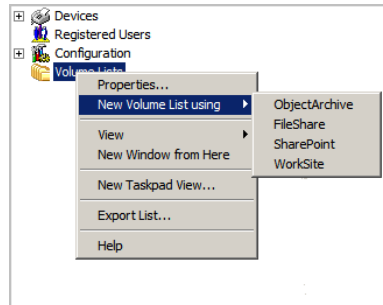
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**Note** A valid license is required to create a Volume List.

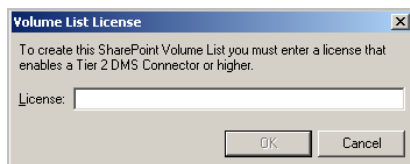
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### To create a Volume List:

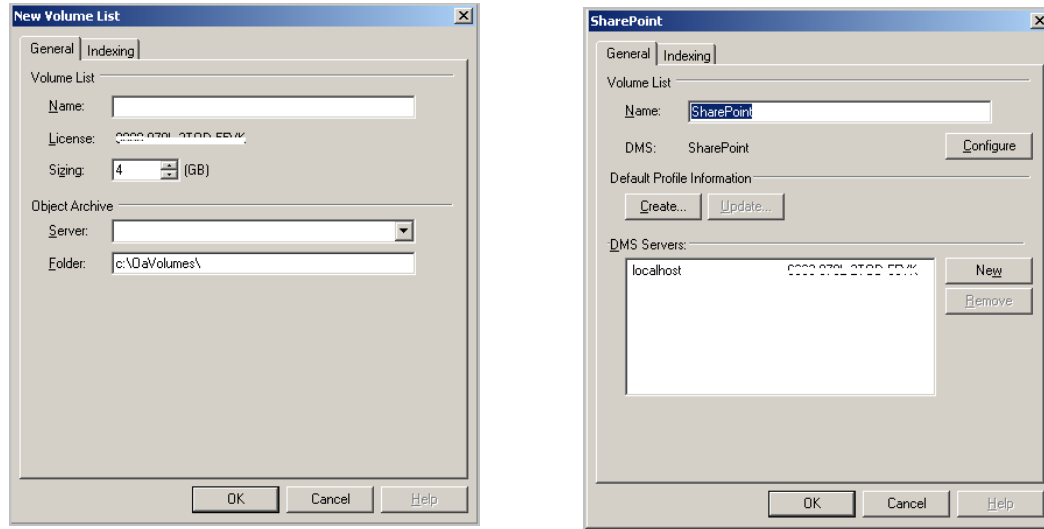
- 1 Open the Omtool Server Administrator.
- 2 In the console tree, expand the Omtool Server.
- 3 Right click **Volume Lists** and select **NEW VOLUME LIST** and then choose where you want to create the Volume List. The options are **ObjectArchive**, **FileShare**, **SharePoint** and **WorkSite** (you will see the WorkSite option only if **Autonomy iManage WorkSite** is installed on your system).



The **Volume List License** page opens.



- 4 In the **LICENSE** text box, add the license and click **OK**. The server validates the license and if you have chosen ObjectArchive, opens the **New Volume List** page. If you have chosen any other DMS, the Volume List property page with the DMS name opens.



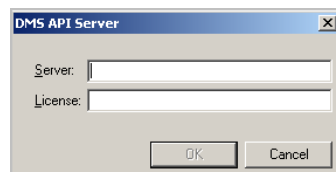
- 5 Configure the Volume List property following the instructions below.

- a If you are configuring ObjectArchive, go to step 6.
- b If you are configuring a DMS, click **CONFIGURE** and continue configuring as necessary.

For example when creating a Volume List in SharePoint, click **CONFIGURE** and follow DMS specific configuration process. (You are presented with the same dialog as when creating a, AccuRoute Connector for DMS). Next, you are prompted to create a Default Profile. These configurations are necessary as they are the basis for how and where items will be stored into the DMS.

**Note** You will not be able to click **OK** and close the Property dialog until you have configured the DMS and created the default profile.

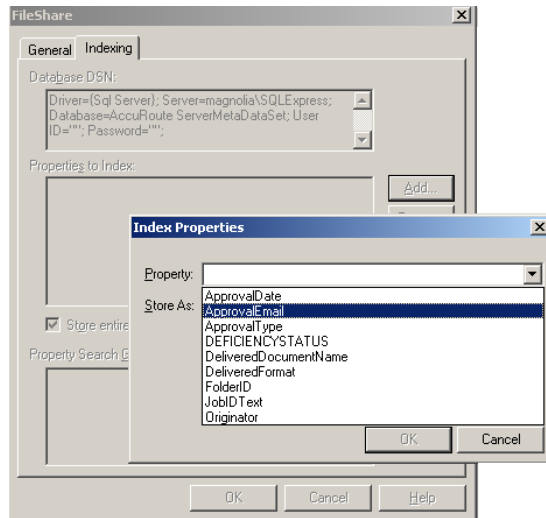
- c Next configure the DMS Servers section. By default 'localhost' is added to the list of DMS Servers. This is the system the AccuRoute Server will use to process DMS API calls for improved scalability.
- d Click **NEW** to open the **DMS API Server** page.



- e In the **SERVER** text box, enter the server name. This is the name of the host where the DMS Libraries are installed for use (The machine can be configured with the DMS Libraries by installing the AccuRoute Connector for DMS).
- f In the **LICENSE** text box, enter a valid license number and click **OK**.

## Section 4: Configuring the AccuRoute Server

- 6 Click **INDEXING** to open the Indexing tab.

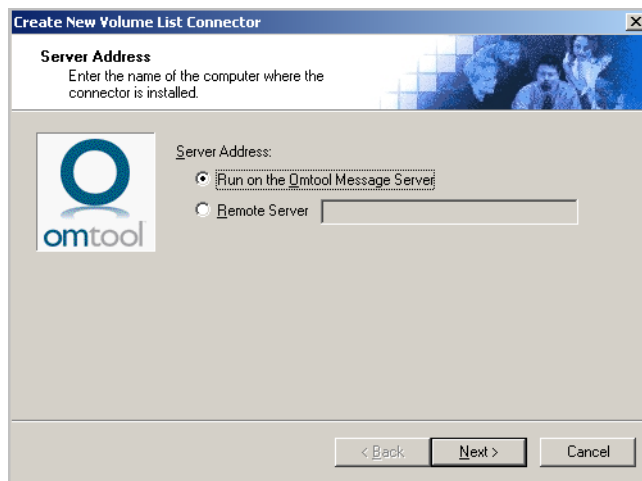


- 7 Select from the Property drop box the message properties for indexing.  
 8 Click **OK** to add the properties and close the **Indexed Properties** page.  
 9 Continue to creating the AccuRoute Connector for Volume List.

## Creating an AccuRoute Connector for Volume List

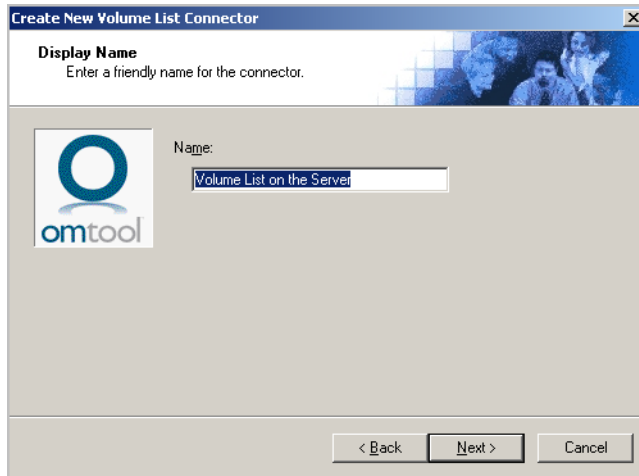
### To add the AccuRoute Connector for Volume List:

- 1 Click **START > ALL PROGRAMS > OMTOL > OMTOL SERVER ADMINISTRATOR**.  
 2 In the console tree, expand the Omtool Server.  
 3 Right click **CONNECTORS**. Select **NEW ACCURROUTE CONNECTOR FOR > VOLUME LIST**. The **Server Address** page opens.



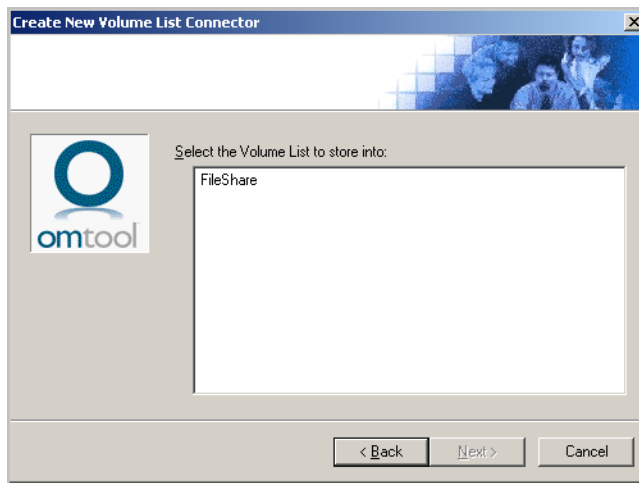


- 4 Click **NEXT**. The **Display Name** page opens.



The screenshot shows a dialog box titled "Create New Volume List Connector". The main heading is "Display Name" with the instruction "Enter a friendly name for the connector." Below this is the "omtool" logo and a "Name:" label. A text input field contains the text "Volume List on the Server". At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

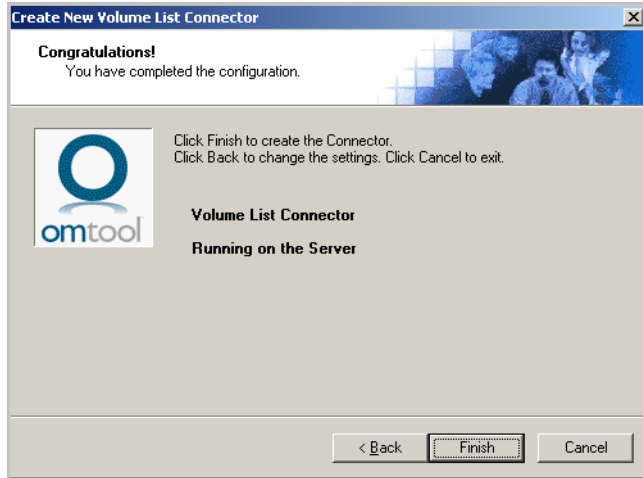
- 5 Enter an appropriate name for the connector or keep the default **Volume List on the Server**.
- 6 Click **NEXT**. The **Select Volume List** page opens.



The screenshot shows the same dialog box, now on the "Select Volume List" page. The heading is "Select the Volume List to store into:". Below this is the "omtool" logo and a list box containing the text "FileShare". At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

- 7 Select the Volume List where the documents should be routed to and stored.

- 8 Click **NEXT**. Configuration is now complete and the **Congratulations** page opens.

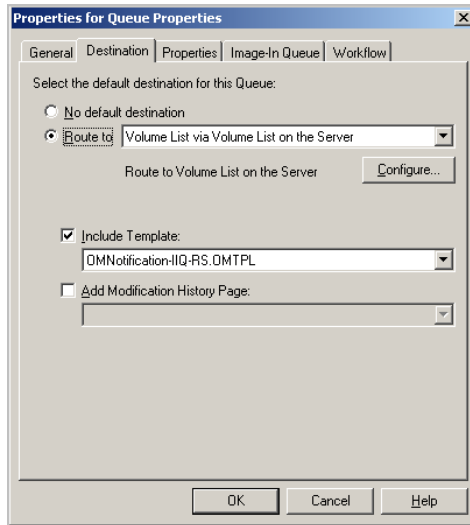


- 9 Click **FINISH**. The connector is now listed in the details pane.
- 10 Continue to configuring the Queue properties.

## Configuring Queue Properties

- 1 Click **START > ALL PROGRAMS > OMTOL > OMTOL SERVER ADMINISTRATOR**.
- 2 In the console tree, expand the AccuRoute Server.
- 3 Right click **QUEUES** and select **NEW > QUEUE**.  
The **QUEUE PROPERTIES** page opens.
- 4 Select the Queue that you will use to route documents.
- 5 Click **DESTINATION** to open the **Destination** page.

- 6 Select the **ROUTE TO** option and from the drop down list, select **VOLUME LIST VIA VOLUME LIST ON THE SERVER** option.
- 7 Click **CONFIGURE** to route documents to the Volume List on the Server.



- 8 Click **OK** to save your changes.

## Configuring Volume List Restrictions

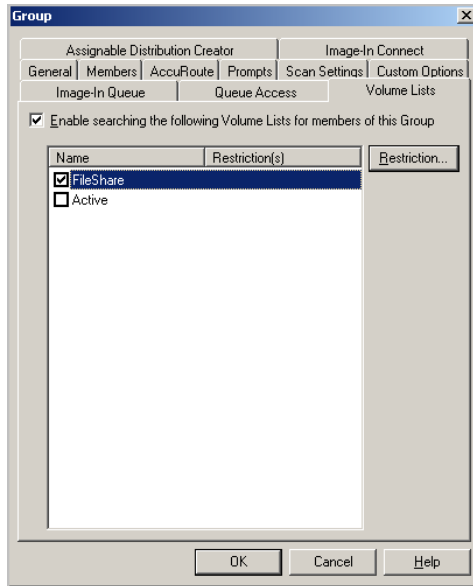
The Volume List Restrictions feature allows the Omtool Server Administrator to restrict user access to certain types of documents in a Volume.

**Note** The Property Dictionary Item used in a restriction must be indexed in the specified Volume List as well as in the Active Volume List. For information on how to create Property Dictionary Items, see the [Configuring Message Property](#) topic in the Omtool Server Help. For information on how to index properties for messages, see the [Creating Volume List](#) topic of the Omtool Server Administrator Help.

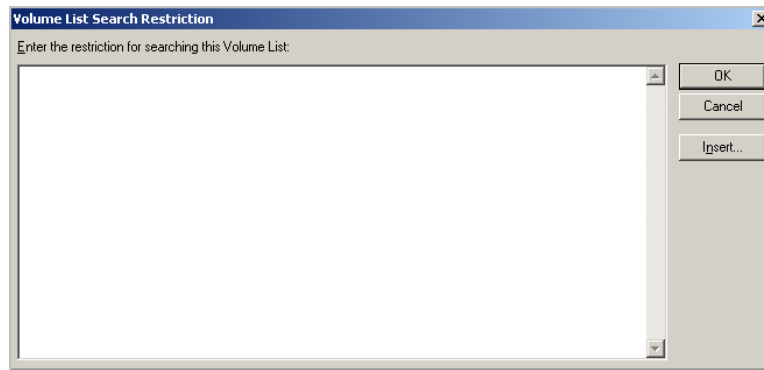
### To configure Group restriction when accessing a Volume List:

- 1 Open the Omtool Server Administrator.
- 2 In the console tree, expand the Omtool Server.
- 3 Expand the **Configuration** node and go to the **Groups** node.
- 4 Open the property page of the Group for which you are configuring Volume List restriction.
- 5 Click **VOLUME LISTS** to open the tab.

- 6 Select the Volume List for which you are configuring the restriction.



- 7 Click the **RESTRICTION** option. The **Volume List Search Restriction** page opens.



- 8 Enter the restriction criteria by inserting OPath [operator] VALUE clauses.

The criteria you enter can be a complicated expression that includes parenthesis and operators. The operators are limited to equals (=), not equals (<>), less than (<), greater than (>), is in (= [ item1, item2, item3, item(n)]), is not in (<> [item1, item2, item3, item(n)]), as well as AND/OR operators.

**Note** Any OPath you enter manually that does not belong to a property that is currently indexed for the selected Volume List will generate an error message when you click **OK** on the Volume List Search Restriction page.

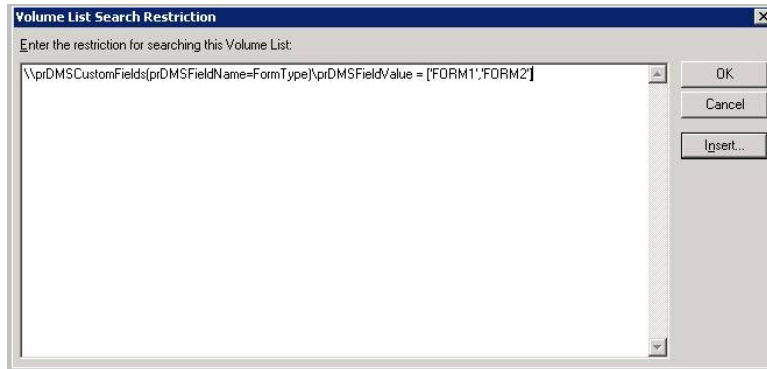
- 9 Optionally, click the **INSERT** option to open the **Select The Property To Insert** page.  
This page displays a list of configured Property Dictionary Items you can select for the restriction.
- 10 Select the property from the list.
- 11 Click **OK** to close the **Select The Property To Insert** page.
- 12 Click **OK** to close the **Volume List Search Restriction** page.
- 13 Click **OK** to close the **Group** properties page.

After a property is selected for insertion, the first OPath, in its mapping list, will be inserted into the restriction edit box where the caret is currently located. You can setup criteria similar to:

```
\\prDMSCustomFields(prDMSFieldName=PrimaryKey)\prDMSFieldValue <> 'PRIVATE'
```

Which would return results only where PrimaryKey is not equal to PRIVATE

You can also setup criteria by Form Types. For example:



Which would only return documents where FormType is either FORM1 or FORM2.



# Section 5: Additional AccuRoute Server Configurations

## Configurations

Depending on your environment, you may require some additional configuration for the AccuRoute Compose Component (Composer) as listed below

This section includes:

[Configuring DCOM permissions for the Remote Composer](#) (5-1)

## Configuring DCOM permissions for the Remote Composer

After installing Feature Pack I on the Remote Composer, verify that the PDF Forms Generator is running with the correct DCOM identity. If necessary, configure the correct DCOM identity by following the instructions below.

### To configure DCOM permissions for the Remote Composer:

- 1 Click **START > RUN**. In the **OPEN** text box, enter `dcomcnfg`.
- 2 Click **OK** to launch the **Component Services MMC** Snap-in.
- 3 Expand the **Component Services** node and drill down to **COMPUTERS > MY COMPUTER > DCOM CONFIG**.

The **DCOM Config** node has the **Compose\_PDFForm** entry.

---

*Note* If **Compose\_PDFForm** is not listed, reboot the system. Then follow the steps 1, 2 and 3 to drill down to the **Compose\_PDFForm** property.

---

- 4 Select the **Compose\_PDFForm** property, right click and choose **PROPERTIES** from the drop down menu options to open the **Properties** page.
- 5 Click on the **IDENTITY** tab.

---

*Note* By default the identity will be set to **THE LAUNCHING USER** option.

---

- 6 Change the setting and select **THIS USER** option and select the Omtool Services Account.
- 7 Click **APPLY** and then **OK** to close the **Properties** page.

Section 5: Additional AccuRoute Server Configurations



# Section 6: Configuring the AccuRoute Web Client

This section includes:

[Configuring the AccuRoute Web Client for Failover](#) (6-1)

## Configuring the AccuRoute Web Client for Failover

AccuRoute Web Client is now cluster aware. You can configure the AccuRoute Web Client to fail over as part of an AccuRoute cluster following the instructions below.

### To configure the AccuRoute Web Client for failover:

- 1 Navigate to **\PROGRAM FILES (X86)\OMTOOL\ACCUROUTEWEB\CONFIGURATION** and open the [AccuRouteWeb.xml](#) for editing.
- 2 In the Connection section of the xml, add the name of the secondary server in your cluster. For example:

```
<Connection>  
  <Server>MAGNOLIA</Server>  
  <FailoverServer>HIBISCUS</FailoverServer>  
  <Authentication type="Exchange">
```

where MAGNOLIA and HIBISCUS are the primary and secondary server names respectively.

- 3 Save your changes and close the xml file.
- 4 Restart the IIS services.

Section 6: Configuring the AccuRoute Web Client

# Section 7: Troubleshooting

This section includes:

[Error when Uninstalling the Remote Administrator After Applying Feature Pack I Update \(7-1\)](#)

## Error when Uninstalling the Remote Administrator After Applying Feature Pack I Update

### Problem:

After installing Feature Pack I on a Remote Administrator, if you try to uninstall the Remote Administrator, you will see the following error:

```
1905.Module C:\Program Files (x86)\Common
Files\Omtool\omDMSObjectArchiveU.dll failed to unregister .HRESULT-
2147220472. Contact your support personnel.
```

Uninstallation continues after you click **OK** on the error message.

### Solution:

You are seeing the error message because the FPI Update removed the file that is mentioned in the error message. You can ignore the error message.

