Release Notes for AccuRoute® v3.01 Feature Packs

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

- AccuRoute v3.01 Feature Pack 5 (1)
- AccuRoute v3.01 Feature Pack 4 (8)
- AccuRoute v3.01 Feature Pack 3 (22)
- AccuRoute v3.01 Feature Pack 2 (27)
- AccuRoute v3.01 Feature Pack 1 (36)

Each Feature Pack release is cumulative. For example, AccuRoute v3.01 Feature Pack 5 contains all the new features and enhancements that were included in the AccuRoute v3.01 Feature Pack 1, 2, 3, and 4 releases.

AccuRoute v3.01 Feature Pack 5

Release date: July 2012
Version 722012

The following is a summary of features specific to AccuRoute V3.01 Feature Pack 5.

	Features
AccuRoute Server Features	Omtool DMS Libraries (2)
Omtool Client Features	Client Versions (2)
	AccuRoute Desktop Printer v3.01.7 (2)
	Image-In Queue v3.3 (3)

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AccuRoute Server Features

Omtool DMS Libraries

Omtool DMS Libraries are qualified with:

- Autonomy iManage WorkSite v9.0. For configuration instructions, see the Omtool DMS Libraries v3.01 Work Site Installation Guide.
- NetDocuments, which provides expanded capabilities to the AccuRoute Server for routing documents to the NetDocuments Cabinet using either the AccuRoute Connector for NetDocuments or the NetDocuments Volume List. See the AccuRoute NetDocuments Readme for more details.

Omtool Client Features

Client Versions

Client versions for AccuRoute Feature Pack 5 are:

Client	Version
AccuRoute Desktop	3.07
AccuRoute Web Client	3.06
Image-In Queue	3.3
Image-In Connect	3.01.7
Server Monitor	3.01.7
OXP v1.4	1.4.1
OXP v1.6	1.6.3

AccuRoute Desktop Printer v3.01.7

The new AccuRoute Desktop Printer feature Requires:

- AccuRoute Desktop v3.07
- Windows Installer v4.5 or greater, which can be found at:

  http://www.microsoft.com/en-us/download/details.aspx?id=8483

Installing and Uninstalling on a Windows 7 System

To install the AccuRoute Desktop printer on Windows 7, run Microsoft Installer (msi) on AccuRoute Desktop:

1. Browse to the following share:

   `\\omtool server\clients share`
2. Copy the `AccuRoutePrinter` directory to a local folder.

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3 Open a **cmd** prompt and run as administrator.

4 Verify the **cmd** prompt is set to where the **AccuRoute Desktop Printer.msi** file is located (where you copied the `AccuRoutePrinter` directory to a local folder).

5 Type:

```
msiexec /qn /i "AccuRoute Desktop Printer.msi"
```

6 On the **Devices and Printers** screen, verify that AccuRoutePDF printer was installed.

To uninstall the AccuRoute Desktop printer on Windows 7:

1 Open a **cmd** prompt and run as administrator.

2 Type:

```
msiexec /x {A623D94A-A8CC-4562-BFDB-33DF6F388D8C}
```

3 On the **Devices and Printers** screen, verify that AccuRoutePDF printer is no longer installed.

Installing and Uninstalling on a Windows XP System

To install the AccuRoute Desktop printer on Windows XP, run Microsoft Installer (msi) on AccuRoute Desktop:

1 Double-click the **AccuRoute Desktop Printer.msi** file.

2 Click **Next** and select **Install**.

3 On the **Printers and Faxes** screen, verify that AccuRoutePDF printer was installed.

To uninstall the AccuRoute Desktop printer on Windows XP:

1 Go to **Add and Remove Programs** on the Control Panel.

2 Remove **AccuRoute Desktop Printer**.

3 On the **Printers and Faxes** screen, verify that AccuRoutePDF printer is no longer installed.

Image-In Queue v3.3

Image-In Queue (IIQ) 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 Queue v3.3 includes:

- **Import from ObjectArchive** - The user can search and view documents in ObjectArchive, and then send them back into IIQ for editing if needed.

Importing from ObjectArchive

1 Follow all installation instructions per the AccuRoute Image-In Queue Online Help.

2 Route a document into **ObjectArchive**.

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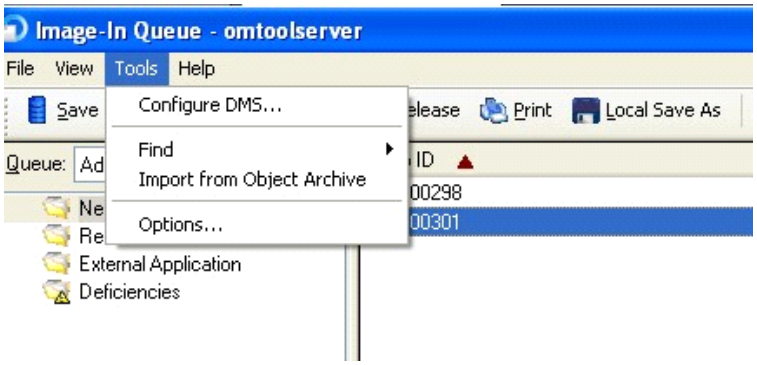
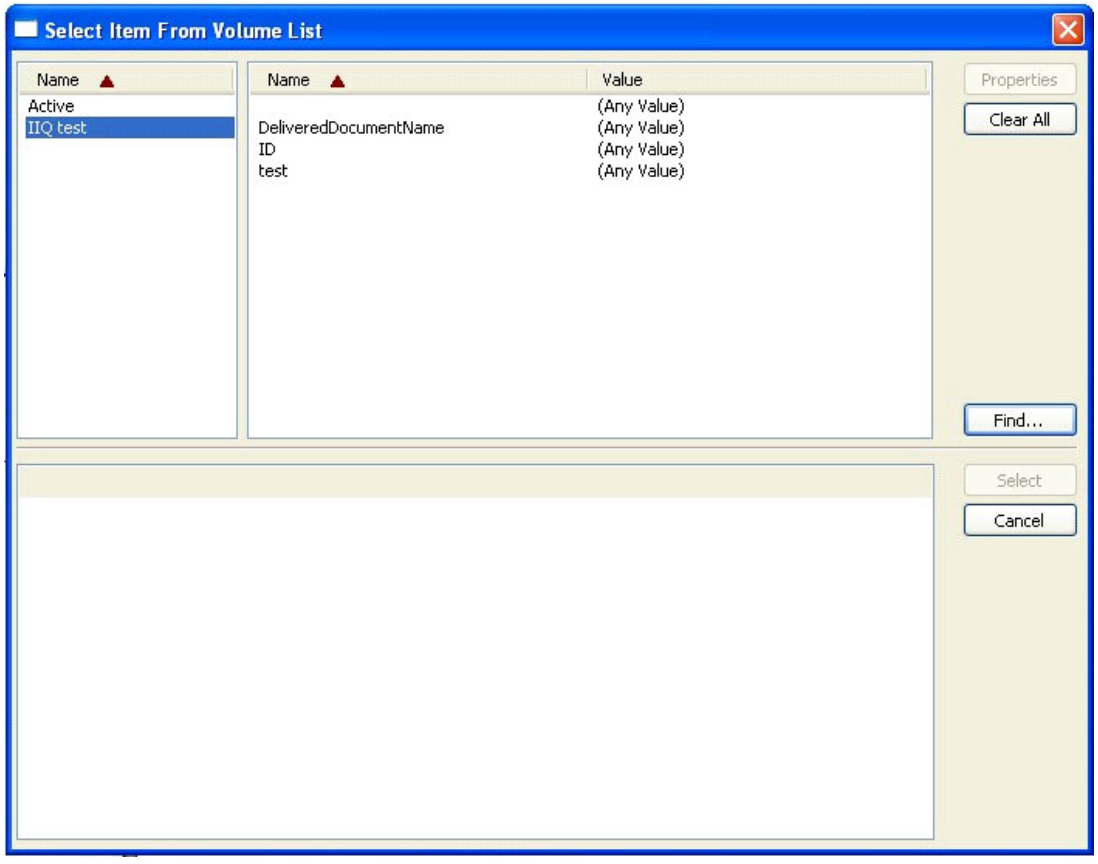
3 To edit a profiled document in ObjectArchive, open the Image-In Queue client and select **Tools > Import for Object Archive**.



4 The **Select Item From Volume List** window opens where you can select the ObjectArchive Volume list (**IIQ test**) from which to search.



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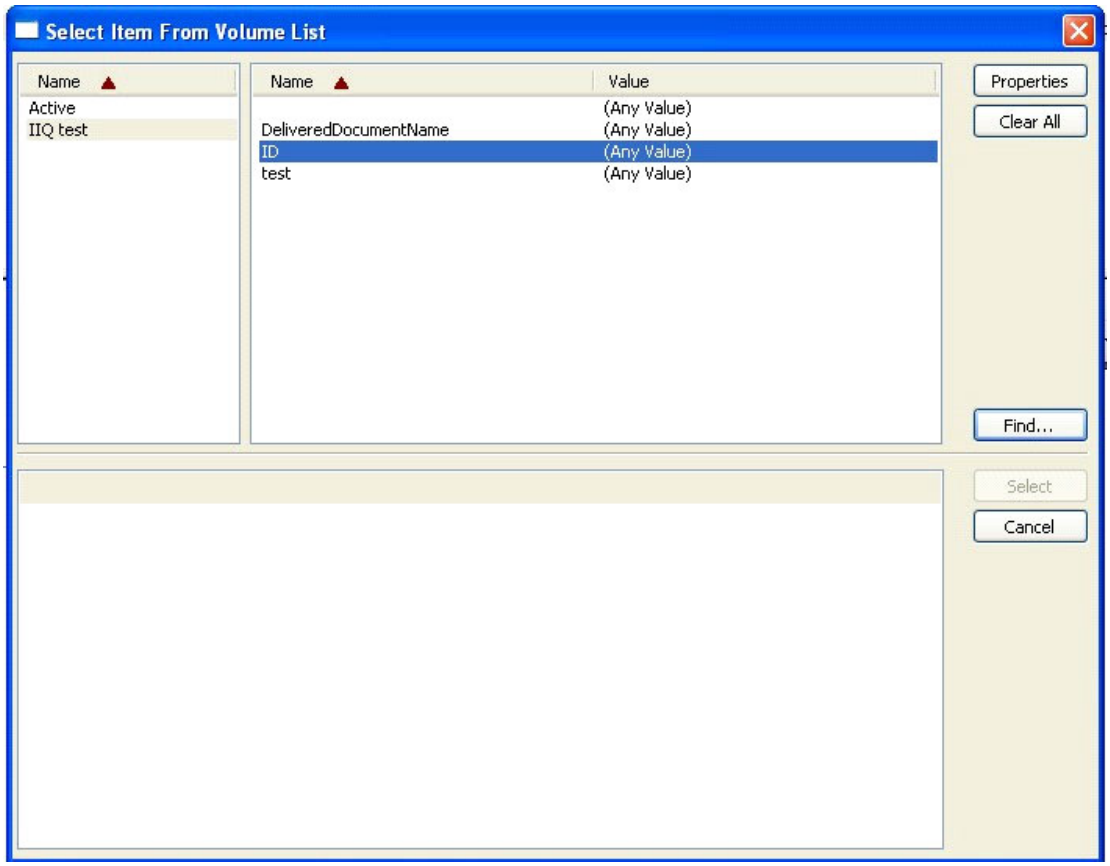
You also can select the documents containing meta-data fields (**ID** and **test**) from which to search.



5 Once the search criteria is defined, click **Find**.

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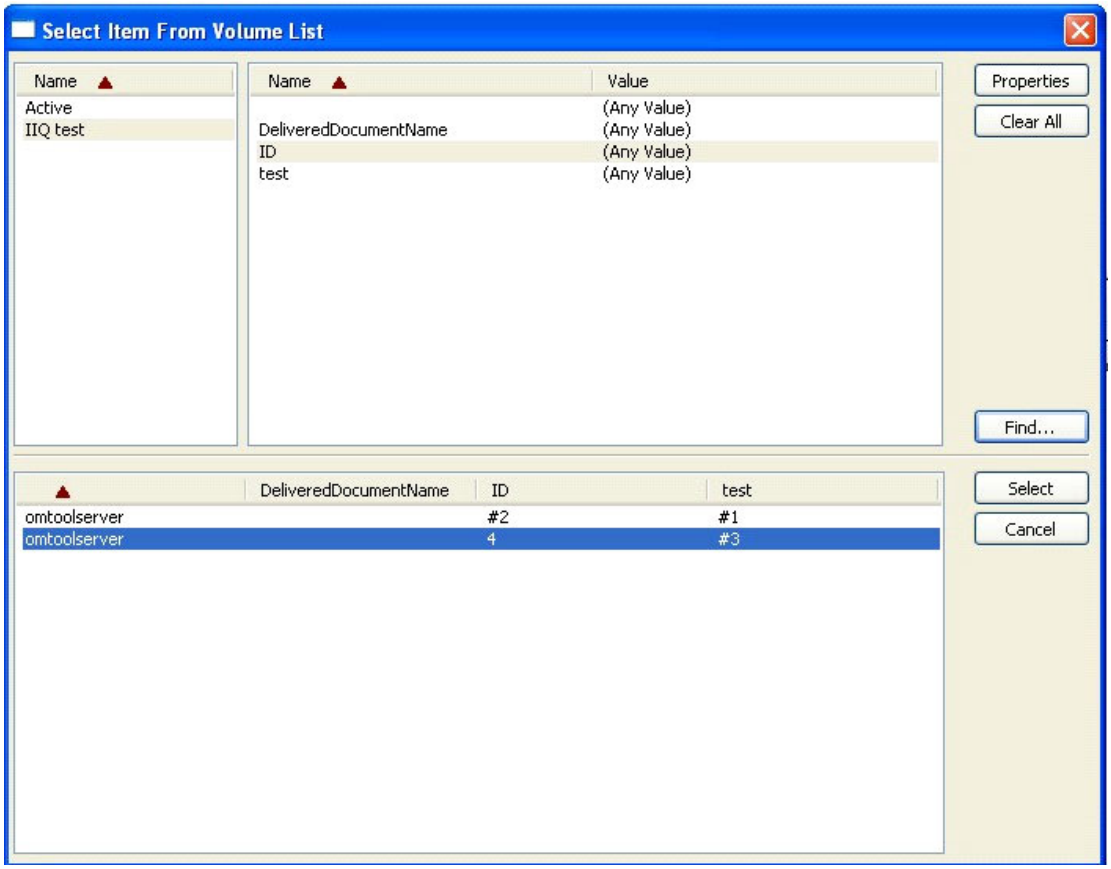
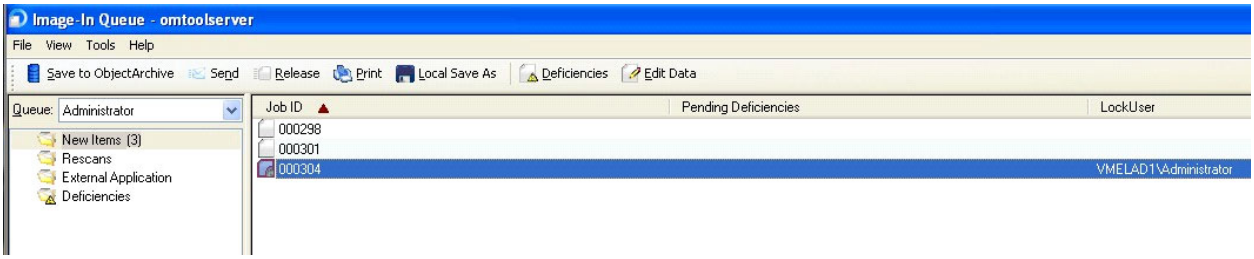
6 Highlight the document you want to edit or confirm its meta-data. Click **Select**.



This imports the ObjectArchived document back into the Image-In Queue in the AccuRoute Server. The document can be seen in the IIQ client for editing.



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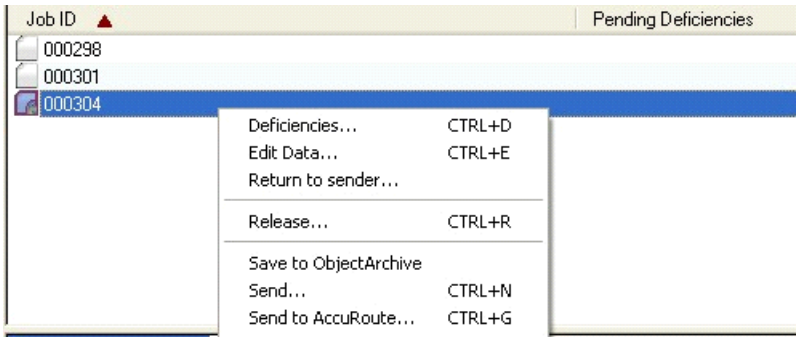
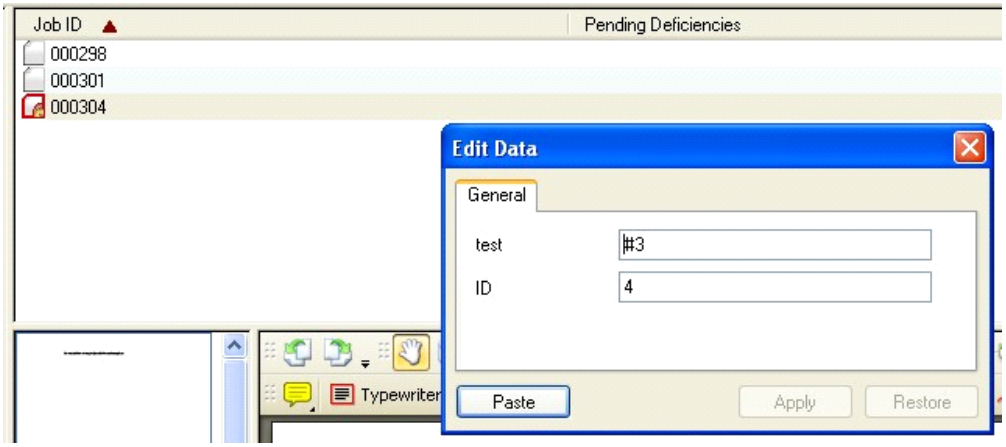
7 To edit meta-data:

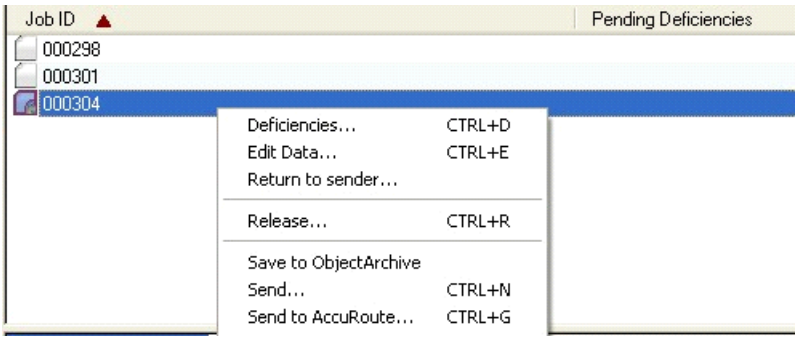
a Right-click to select the document. Select the **Edit Data** option.



b You can edit the meta-data fields or add annotations. Then, you can resubmit them back into ObjectArchive.



8 Right-click to highlight the document that was edited or annotated. Select the **Release** option to send the document back into ObjectArchive.



The AccuRoute Server will process the newly edited document and route it back into ObjectArchive.

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AccuRoute v3.01 Feature Pack 4

Release date: May 2012
Version 5122012

The following is a summary of features specific to AccuRoute V3.01 Feature Pack 4.

	Features
AccuRoute Server Features	Third-Party Compose Engine Updates (8)
	Asian Language OCR Functionality with Nuance OmniPage Capture (16)
	Document Stamps (9)
	Properties for Customized Workflows (9)
	Group Permissions Updates (12)
	Connector Updates (14)
	Compose Component Updates (15)
Omtool Client Features	Client Versions (19)
	Device Translation Table (DTT) (19)

AccuRoute Server Updates

Third-Party Compose Engine Updates

AccuRoute V3.01 Feature Pack 4 updates all vendor libraries (Nuance, Ghostscript, Datalogics, etc.), as necessary. The AccuRoute installation includes updates to the following:

- Ghostscript version 9.04
- Adobe PDF Library version 9.1.0.54
- Inlite Research ClearImage SDK version 7.0.3189
- Aspose is a conversion engine that enables the AccuRoute Server to convert Microsoft Office files even when the MS Office suite is not installed. The Aspose engine can convert these file types to PDF:

Aspose	Version	File Types
Aspose.Word	10.8.0.0	DOC / DOCX (OCR text) / RTF
Aspose.Slides	5.8.0.0	PPT / PPTX
Aspose.Diagram	1.7.0.0	VSD / VSDX
Aspose.Cells	7.0.3.0	XLS / XLSX

- Nuance OmniPage Capture version 16.6, which includes Asian language OCR functionality, as described below

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Document Stamps

A Document Stamp includes a "top line" on an internal fax. The top line is created by specifying these variables:

- **DATE** - Current date.
- **TIME** - Current time.
- **PAGE** - Individual page number.
- **PAGE_COUNT** - Total page count.

Use the following procedure to create variables that will appear in the Document Stamp.

1. Start the **Omtool Server Administrator**.
2. Expand the console and go to **Configuration**.
3. Right-click on **Document Stamps** and select **New > Document Stamp**.
4. Enter a descriptive name in the **Name** text box.
5. Enter the stamp information (such as the following) in the **Text** section.

   ```
   Text: DATE: {DATE} TIME: {TIME} PAGE {PAGE_NUMBER} of {PAGE_COUNT}
   ```

6. Change the font size (such as from the default to 11). Optionally, configure the font type, color, location, and alignment.
7. Click **OK** to complete the configuration.

Note Document Stamps are applied to faxes that route to a device, based on a match in the Destination Translation Table (DTT). See the AccuRoute Web Client **Administration** tab features to create a DTT entry that has the Document Stamp applied to it. (Go to Creating the DTT Table (Adding Devices) on 20.)

Properties for Customized Workflows

Critical Properties for MEDITECH Routing

Two procedures are provided to create properties for MEDITECH routing: one for new AccuRoute installations and another for existing installations.

If you have a **new** AccuRoute Installation:

1. After installing AccuRoute V3.01 Feature Pack 4, start the **Omtool Server Administrator**, expand the console, and go to **Configuration**.

   Create four properties, each with a DMS custom field defined. The property names are:

   - AccountNo
   - MedRecNo
   - ExternalKey
   - ExternalKeyEnd

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To create each property:

a Right-click on **Properties > New > Property Dictionary**.

b In the **Name** text box, enter the property name (AccountNo, etc.).

c In the **Label** text box, enter the property label.

d In the **Mappings** section, click **New**.

e Select the **DMS Custom Field** option. In the text box, enter the property name (AccountNo, etc.). Click **OK**.

f Click **OK**.

2 Create a MEDITECH connector: **Connectors > New AccuRoute connector for > MEDITECH**.

3 Create a Filescan connector: **Connectors > New AccuRoute connector for > Filescan**.

Set Filescan to **Virtual** mode.

4 Create a volume list to ObjectArchive: **Volume Lists > New Volume List using > ObjectArchive**.

Index the four properties (created in Step 1). Add all properties to indexing on Active and other Volume Lists.

5 Create IIQ Queue:

a Have the default route to the OA connector.

b On the **Notifications** tab, select **MEDITECH**.

c Create a workflow rule to have all inbound messages match and auto-route to the default rule.

6 Using Filescan, add a control file to match the IIQ rule.

7 Go into the **Queues**, **Notifications** tab, **Advanced**, and set a FirstByte and starting value for the MEDITECH key.

If you have an **existing** AccuRoute installation:

1 In addition to the existing properties AccountNo, MedRecNo, and ExternalKey, you need to create another property called ExternalKeyEnd. To create this property:

a Right-click on **Properties > New > Property Dictionary**.

b In the **Name** text box, enter:

```
ExternalKeyEnd
```

c In the **Label** text box, enter the property label.

d In the **Mappings** section, click **New**.

e Select the **DMS Custom Field** option. In the text box, enter the property name (AccountNo, etc.). Click **OK**.

f Click **OK**.

2 Because you now have a new property, a SQL script must be run in order to update your database. You must call Omtool Customer Support to complete this update.

Important Messages will not be delivered to MEDITECH if the SQL script is not run on the database.

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Optional Configuration for the Fax Hold and Release Button

In order to support the Fax Hold and Release button for Embedded AccuRoute for HP OXPd v1.6.3, a new property dictionary item must be created to filter the pending jobs for each destination fax number as it is listed in the Destination Translation Table (DTT).

This configuration involves:

- Creating the Fax Hold and Release property (prDestinationFaxNumber) dictionary item
- Configuring the Active volume list

To create the prDestinationFaxNumber property:

1. Click **Start > All Programs > Omtool > Omtool Server Administrator**.
2. Expand the console tree and go to **Configuration**.
3. Right-click **Properties > New > Property Dictionary**. The **Property Dictionary Item** page opens.
4. In the **Name** text box, enter the metadata field name.
5. In the **Label** text box, enter a suitable label.
6. In the **Instructions** text box, enter any needed instructions.
7. Verify that the **Type** is set to **Text**.
8. In the **Mappings** section, click **New** to open the **Property Definition** page.
9. Select **Property Name** option and enter:

   `prDestinationFaxNumber`
10. Click **OK** and then **OK** again to create the property.

To configure the Active volume list:

1. Click **Start > All Programs > Omtool > Omtool Server Administrator**.
2. Expand the console tree and go to **Configuration > Volume Lists**.
3. Double-click the **Active** volume list to open the **Active** properties page.
4. Click the **Indexing** tab.
5. In the **Properties to Index** section, click **Add**. The **Index Properties** page opens.
6. Select from the **Property** drop-box the same property that you created in the previous procedure.
7. Click **OK** to close the **Index Properties** page.
8. In the **Property Search Groups** section, click **Add**. In the **Name** text box, enter:

   `prDestinationFaxNumber`
9. Select **Add**, then select **prDestinationFaxNumber**. Click **OK** and then **OK** again.
10. Click **OK** to close the **Active** page.

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Group Permissions Updates

Updates to Group permissions include:

- Defining a default fax cover page that members of a group will use when sending a fax message.
- Specifying job properties that will be applied to a message when it is sent from a user who is member of a group.
- Setting the destinations to which a group member can (and cannot) send messages. By default, all destinations (E-mail, Fax, Folder, Printer, etc.) are selected.
- Configure Group permissions to allow the user to view Administrator options for the Device Translation Table (DTT) in the AccuRoute Web Client.

Procedures for each feature are provided below.

Default Fax Cover Page for Group Permissions

You can indicate that members of a group will use a specific fax cover page when sending a fax message.

1. Start the **Omtool Server Administrator**.
2. Expand the console and go to **Configuration**.
3. If you are creating a new group:
   a. Right-click **Groups**. Select **New > Group**.
   b. After entering and name and description for the new group, click the **Fax Cover Pages** tab.

   If you are modifying an existing group:
   a. Right-click on the group name. Select **Properties**.
   b. Click the **Fax Cover Pages** tab.
4. Select the **Enable members of this group to use the selected fax cover pages** option.
5. Click **Add**.
6. Select a template as the cover page, then click **OK**.
7. Select the file name. (A check should appear to the left of the name.)
8. Optionally, you can require that members of this group must specify a fax cove page (by selecting the option at the bottom of the page).

   Note If you select this option but do not set a default fax cover page, a warning message will display when a member of the group sends a fax message.

9. Click **OK**.

Job Properties for a Group

You can specify that a job property (including value and type) will be applied to a message when it is sent from a user who is member of a group.

1. Start the **Omtool Server Administrator**.
2. Expand the console and go to **Configuration**.

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3 If you are creating a new group:

   a Right-click **Groups**. Select **New > Group**.

   b After entering and name and description for the new group, click the **Job Properties** tab.

   If you are modifying an existing group:

   a Right-click on the group name. Select **Properties**.

   b Click the **Job Properties** tab.

4 Select the **Enable members of this group to receive the specified job properties** option.

5 Click **Add**.

6 Click the browse (...) button for the **OPath** and then select a property dictionary field. Click **OK**. The job property path appears in the OPath field.

7 Enter a **Value** and select a **Type**, as appropriate.

8 Optionally, you can select the option to override this job property if the job already has this property set.

9 Click **OK**.

10 Click **OK** again.

Destination Support for a Group

You can set the destinations to which a group member can (and cannot) send messages. By default, all destinations (E-mail, Fax, Folder, Printer, etc.) are selected.

1 Start the **Omtool Server Administrator**.

2 Expand the console and go to **Configuration**.

3 If you are creating a new group:

   a Right-click **Groups**. Select **New > Group**.

   b After entering and name and description for the new group, click the **Destinations** tab.

   If you are modifying an existing group:

   a Right-click on the group name. Select **Properties**.

   b Click the **Destinations** tab.

4 Select the **Enable members of this group for specific destinations only** option.

5 Deselect (uncheck) destinations, as appropriate. When a destination is not checked, a member of the group will not be able to send a message to that destination.

6 Click **OK**.

Creating the Device Translation Table (DTT) Administrator Group for the AccuRoute Web Client

You can configure Group permissions to allow the user to view Administrator options for DTT in the AccuRoute Web Client.

1 Start the **Omtool Server Administrator**.

2 Expand the console tree and go to **Configuration > Groups**.

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3 Right-click **Groups**. Select **New > Group**.

4 In the **Name** text box, enter a name for the group:

`DTT Administrator Group`

5 In the **Description** text box, enter a brief description.

6 Click the **Members** tab, then click **Add**. The **Add Group** page opens.

7 Enter a predefined Active Directory group and click **Check Names**.

8 Select the group from the list returned and click **Finish**.

9 Click the **AccuRoute** tab.

10 Select the **Enable members of this group as AccuRoute users** option.

11 In the **Allow group to Route to** section, select the **Printer**, **E-mail**, and **Fax** options.

12 Click the **AccuRoute Web** tab.

13 Select the **Enable members of this group for the following features** option.

14 Select the **Allow Device Translation Table Maintenance and Viewing** option.

15 Click **OK** to save the configuration changes.

Connector Updates

Updates to connectors include:

- **ProLaw DMS Connector** - Required when using ProLaw with the AccuRoute Desktop or the optional AccuRoute Extensions for ProLaw (contact your Omtool Sales representative).
- **SMTP Connector Setting for Mail Interceptor** - Allows the AccuRoute Server to capture SMTP mail messages created by any SMTP mail client, and then process those messages through the AccuRoute Server before delivering to the intended SMTP e-mail recipient.

Configuration procedures for each connector are provided below.

Configuring the ProLaw DMS Connector

Note A Tier 2 DMS connector license is required.

1 Start the **Omtool Server Administrator**.

2 Expand the console tree and right-click on **Connectors**.

3 Select **New AccuRoute connector for > DMS**.

4 Enter a license for the ProLaw connector. Click **Next**.

5 In the **Server Address** field, select **Run on the Omtool Message Server**. Click **Next**.

6 In the **Name** field, enter a name for the connector. Click **Next**.

7 For the **DMS type**, select **ProLaw** from the drop-down menu. Click **Next** and then **Finish**.

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8 Add the connection string when prompted:

```
Server=ProlawServer\ProLawDatabase;database=ProLawDatabaseName:
Trusted_Connection=yes:User ID='domain\username';Password='password'
```

For example:

```
Server=Srv100\ProLaw;database=ProLaw:Trusted_Connection=yes:User
ID='Production\ProAdmin;Password='Pr0Adm1n'
```

9 Click **Test** to test the connection string to the ProLaw database.

10 After a successful connection message, click **Finish** on the **ProLaw Configuration** dialog.

SMTP Connector Setting for Mail Interceptor Overview

In most cases, the source SMTP mail client is a multifunction peripherals (MFP) or other network scan device performing a scan to e-mail function. The MFP would be configured to use the AccuRoute server as its SMTP mail relay. The IIS/SMTP services running on the AccuRoute server would capture the mail message and submit a job on the message server queue.

FROM, TO, CC, BCC, Subject, and Body Text of the original SMTP mail message are unchanged when the AccuRoute Server processes the message. Only the file attachment will be processed and converted, as specified by the system administrator. The system administrator can specify the delivery file format, selecting one format to convert. This format is selected from the list of output file formats supported by the server.

The transaction details about these intercepted e-mails will be tracked and archived as they would be for any other job routed through the message server, submitted in any way.

Configuring the SMTP Mail Interceptor

1 Start the **Omtool Server Administrator**, expand the console tree, and go to **Connectors**.

2 Select **SMTP on the Server**. The **Properties for SMTP on the Server** page opens.

3 Click **Advanced**.

4 Select the **E-mail Interceptor** option at the bottom of the page to enable the Interceptor to capture all e-mail messages relayed through the server.

5 Click **OK** twice to complete the configuration.

Compose Component Updates

Updates to the Compose Component include:

- PDF/A format is selectable for document conversion.
- Asian language OCR functionality is available with Nuance OmniPage Capture.
- The Compose Bypass feature that can be used for any file that normally would fail.
- Quick Response (QR) barcode feature is supported.
- Maintenance-Archive supports regular expressions as part of the archive criteria.

Procedures for each feature are provided below.

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PDF/A is Selectable for Document Conversion

The Compose Component now supports PDF/A as document final format. PDF/A is the ISO Standard for using the PDF file format in archiving electronic documents.

- PDF/A
- PDF/A (image + OCR text)
- PDF/A (OCR text)

Note The PDF/A1-b final format will be preserved through splits and merges.

When PDF/A files are opened in Adobe Acrobat, they can have a blue bar across the top indicating they are PDF/A compliant. To ascertain the compliance, run the file through a PDF/A verifier such as Preflight, which is found in the full version of Adobe Acrobat. Or, use the free online verifier at: http://www.pdf-tools.com/pdf/validate-pdfa-online.aspx.

Tip Files that start as electronic documents may fail PDF/A-1b conformance verifications due to the potential issues related to font availability. Omtool recommends using scanned documents for PDF/A conversions.

Note Omtool uses Adobe Acrobat X for PDF/A-1b conformance verification.

Asian Language OCR Functionality with Nuance OmniPage Capture

Note This feature requires a valid Asian OCR license. Contact Omtool Sales to purchase this license.

To test Compose of an Asian Language to an OCR final format:

1. Enable one Asian language type (such as Chinese).

   Note Only one Asian language can be enabled for a composer at one time. If you enable more than one Asian language, all documents will fail to compose.

2. Submit your documents via Filescan with a control file property for the OCR conversion type of the language you want to be OCR'd.

   Tip Best practice is to have OCR.RTF or OCR.DOC, OCR.DOCX as the final form so that you are viewing the actual characters and not an image of the characters.

3. To set up the composer, begin by opening the **Omtool Server Administrator**.
4. Select **Components > Compose**.
5. Click the **OCR** tab and then the **Advanced** button.
6. Click the **Languages** tab.
7. Select the Asian language, such as **Chinese - Simplified (qcs)**. Click **OK**.
8. Click the **Composers** tab and then the **Add** button.
9. Enter `localhost` as the **Server Address**. Then enter an Asian compose license for the **License key**. Click **OK**.
10. Highlight the Asian language composer and click the **Properties** button.

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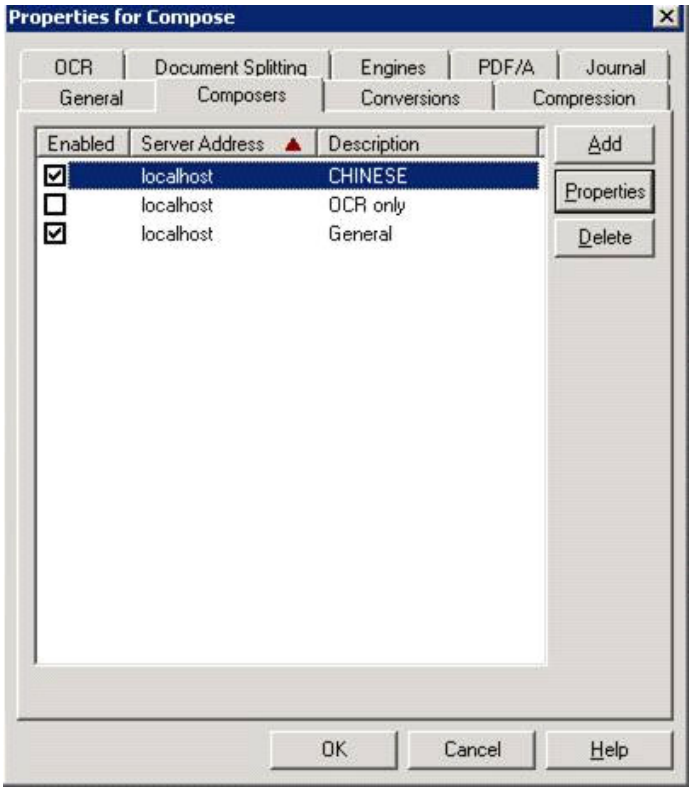
11 On the **Composer Package Properties** page, you can enter a **Description** (such as **CHINESE**).

12 Click the **Convert To** tab. Enable only OCR.xxx file conversion. Click **OK**.

13 On the **Properties for Compose** page, disable the **OCR only** composer to ensure that compose jobs are sent to the Asian language composer (such as the Chinese composer).



14 Create an outbound rule (**Messages > Outbound**) with criteria to set the destination as a fax number, an action to route to a connector (Filescan on the Server), and the document delivery method as DOC (OCR Text).

15 Submit a quick fax (**Messages > New > Quick Fax**) to the fax number. Add the language document (such as chinese_sample.doc) as an attachment.

16 Verify that the file is composed and that the final form is in the same language as the original.

To test another Asian Language without changing anything on the composers from the above testing:

1 Create a control file with the following variables:

```
#SENDER_EMAIL test@test.com
# \\prComposeOcr\prOCRLanguages(prOCRLanguageId=122)\prEnabled 1
#DESTINATION 123
```

The second line indicates the language. In the example above, Korean is specified (LanguageID=122).

2 Submit a language file (such as Korean) to be OCR'd.

3 Verify that the output is converted correctly.

You can test each language OCR, one at a time, by submitting the jobs through Filescan using the control file and setting these properties:

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Japanese
`\\prComposeOcr\prOCRLanguages(prOCRLanguageId=119)\prEnabled 1`

Chinese (Simplified)
`\\prComposeOcr\prOCRLanguages(prOCRLanguageId=120)\prEnabled 1`

Korean
`\\prComposeOcr\prOCRLanguages(prOCRLanguageId=122)\prEnabled 1`

Thai
`\\prComposeOcr\prOCRLanguages(prOCRLanguageId=123)\prEnabled 1`

Compose Bypass

The Compose Bypass can be used for any file that normally would fail. This composer allows specific rules to be created so that files of that type are submitted to the server along with other attachments that are passed through. For example, a user could send a PDF file and a ZIP file to the server so that the PDF and ZIP files are included in the delivered message.

Note In order for files to be passed through the server, they must match a rule that has the Document Delivery Format set to **Deliver Original Format**.

To enable the Compose Bypass:

1. Start the **Omtool Server Administrator**.
2. Expand the console and go to **Components > Compose**.
3. Click the **Composers** tab.
4. Click the **Conversions** tab.
5. Select an existing composer type or add a new one.
6. Select the **mrp - Compose Bypass** option as the conversion engine for MRP files.

Note MEDITECH MRP files use the **Compose Bypass** option by default.

QR Barcodes

The Data Extractor Component has been enhanced to support the detection of QR Barcodes within documents.

Maintenance Archive Supports Regular Expressions

To add a regular expression as criteria for the Maintenance Archive:

1. Start the **Omtool Server Administrator**.
2. Expand the console and go to **Components > Maintenance**. The **Properties for Maintenance** page opens.
3. Click the **Archive** tab.
4. Click **Add** and select the type of archive to create. Click **Next**. The **Archive** page opens.
5. Select options in the **Type of message to archive** section, as appropriate.

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6 Select the **Message must also match expression** option and enter the expression. You can click **Insert** for a list of properties.

7 Click **Next**. The **Document Types** dialog opens.

8 Continue to define the archive, as appropriate.

Omtool Client Features

Client Versions

The client versions used with AccuRoute V3.01 Feature Pack 4 are:

Client	Version
AccuRoute Desktop	3.06
AccuRoute Web Client	3.05
IIQ	3.2
IIC	3.01.6
Server Monitor	3.01.6
HP OXP v1.4	1.4.1
HP OXP v1.6	1.6.3

Device Translation Table (DTT)

The DTT is used to define routing features for a specific device. With these features, you can:

- Hold all jobs for an indefinitely period of time the "hold" is specific to a fax number. You also can release all jobs using a PIN associated with the fax number.
- Create and use a "release" calendar to specify times during which all fax jobs will be released.
- Match the fax to a specific device printer. You can match the fax number to an IP address to reduce the cost of fax-to-fax transmission.
- Specify the device paper tray used to print inbound fax messages.
- Apply a Document Stamp ("top line") on an internal fax.
- Route using the RightFax feature.

Procedures for creating calendars and using DTT features are provided below.

Creating Release Calendars

Release calendars are used when defining a routing destination (described in the next section). Times specified on a calendar indicate when faxes are released. For example, if the calendar is set as Monday through Friday, starting in the morning at 8:00 and ending in the afternoon at 5:00 (17:00), faxes will be released only during that time period.

1 In the AccuRoute Web Client, click the **Administration** tab. Then, click **Calendars**.

2 Click **New**.

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3 Enter a name for the calendar in the **Name** text box.

4 Select start and end times for Monday through Friday.

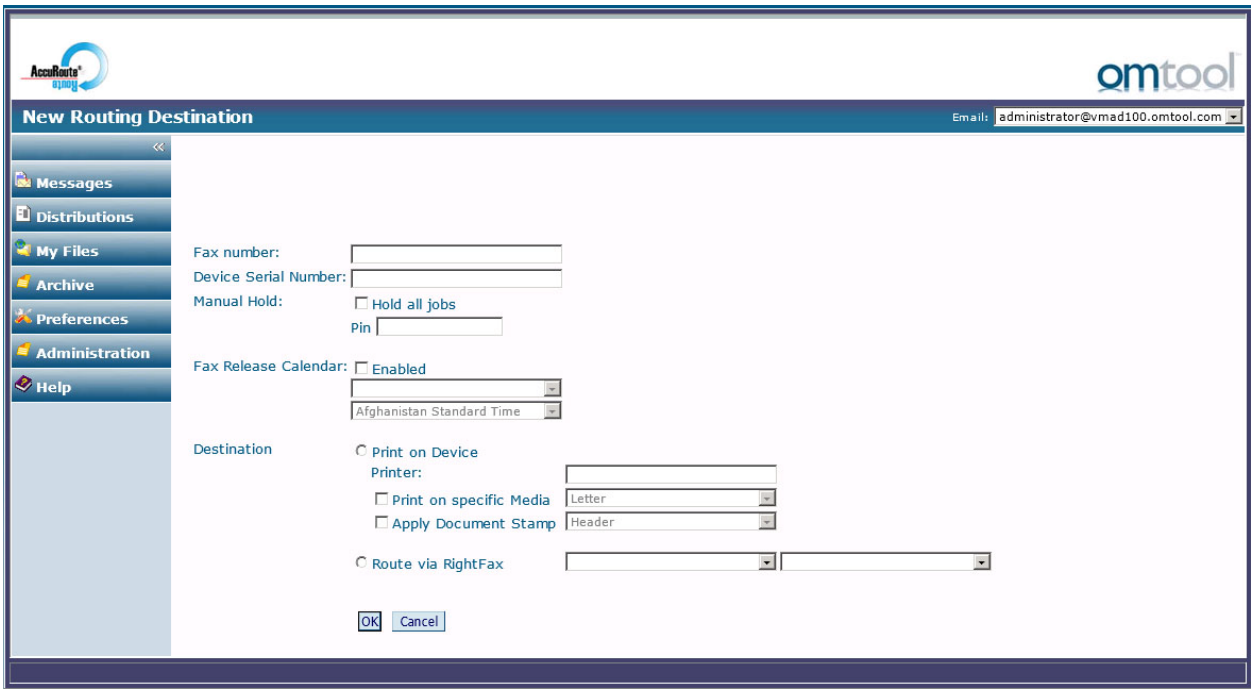
5 Optionally, select the **Saturday** option and enter start and end times. (If this option is not selected, Saturday is not included in the calendar.)

6 Optionally, select the **Sunday** option and enter start and end times. (If this option is not selected, Sunday is not included in the calendar.)

7 Click **OK**.

Creating the DTT Table (Adding Devices)

1 In the AccuRoute Web Client, click the **Administration** button. Then click **New**. The **New Routing Destination** page opens.



2 Enter the following information:

- **Fax Number** - Enter the fully normalized fax number (for example: `+10005551234`).\
- **Device Serial Number** - Enter the serial number for the device.
- **Manual Hold** - Select the **Hold all jobs** option if all jobs to this device number are to be held indefinitely. If you select this option, enter in the **PIN** text box the PIN value to be used to enable or disable the Manual Hold feature.

  If there are multiple fax numbers associated with a device, each fax number will need a separate PIN.

  If a device is manually put on hold, it will not release jobs until this feature is disabled (the option is not selected). You must enter the applicable PIN to deselect the option.
- **Fax Release Calendar** - Select the **Enabled** option if you want to specify a date on which all fax jobs will be released. Select the **Calendar** and **Time Zone** from the drop-downs.

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- **Destination** - Select either of these options:
  - **Print on Device Printer** - Enter the device IP address or the UNC path to the device. You can select the **Print on specific Media** option to choose the paper tray used to print incoming faxes. An inbound fax message is queued for a matched device or printer and then printed using a specified paper tray during the time specified with the release calendar.

    You also can select the **Apply Document Stamp** option to include a "top line" on an internal fax.
  - **Route via RightFax** - Select the AccuRoute Connector for RightFax in the first drop-down menu and then select the server address of the RightFax Server from the second drop-down menu.

3 Click **OK**.

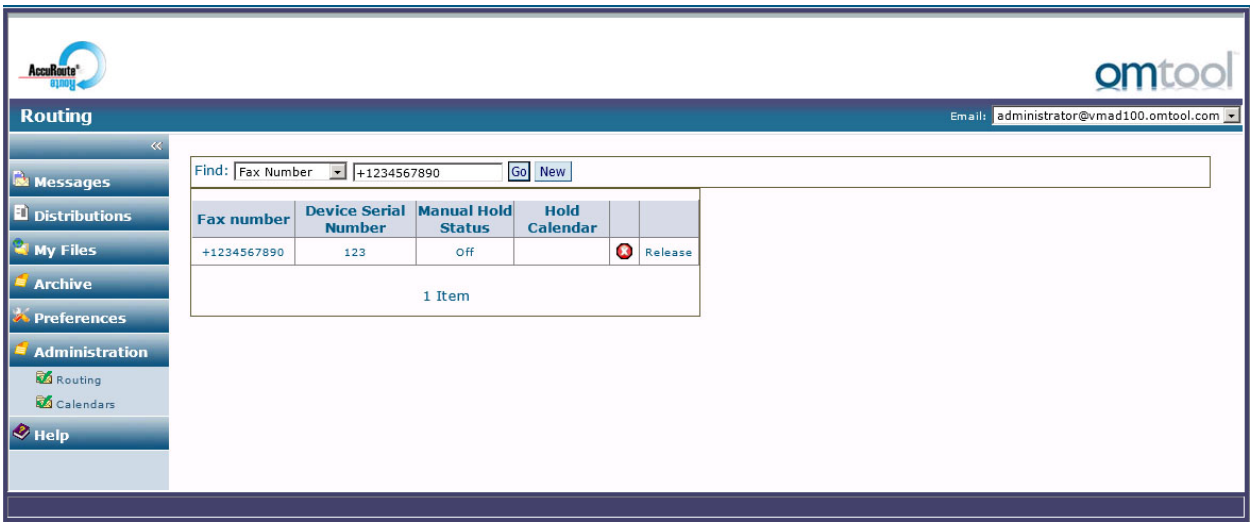
To verify that a device was added properly:

1 In the AccuRoute Web Client, click the **Administration** tab.

2 In the **Find** drop-down on the Routing page, select **Fax Number**. (Optionally, you can select the **Device Serial Number**.)

3 Enter the fax number and click **Go**.

4 Verify that the DTT entry shows up. For example:



5 Click on the fax number in the table (or the device serial number). The **Routing Destination Properties** page is displayed. Verify the properties for the DTT entry.

6 Click **OK**.

7 Send a fax (within the release time if a calendar is specified). Verify that the fax is received and printed.

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AccuRoute v3.01 Feature Pack 3

Release date: September 2011
Version 9262011

The following is a summary of features specific to AccuRoute V3.01 Feature Pack 3.

	Features
AccuRoute Server Features	Custom Workflow (22)
	Virtual Queues (23)
	Enhancement to the Data Extractor Component (23)
	Enhancement to the AccuRoute Component: Image-In Queue (23)
	Enhancement to the Image-In Connect (IIC) Node: Apply Property Formatting (23)
	New AccuRoute Component: Collection Locator (24)
Omtool Client Features	AccuRoute Web Client v3.06 (24)
	Image-In Queue v3.2 (25)
	Omtool Workflow Integration Application (26)
	AccuRoute Server Monitor (26)

AccuRoute Server Features

Custom Workflow

AccuRoute V3.01 Feature Pack 3 introduces the custom workflow capability which allows the Omtool Administrator to customize the Omtool Server workflow by rearranging the order of component execution such that they are not executed in the default order.

Here is an example of a customized workflow:

Compose > DataExtractor > Collection Locator > Archive > History

In this case, the job is processed by Compose Component, sent to Data Extractor for metadata extraction and then sent to the Collection Locator Component for metadata matching, routing and storage.This custom workflow skips the initial Dispatch and the intervening components (including the extra states like Approval Manager, Lookup Manager, Review Manager etc.) By avoiding the Dispatch Component, the Administrator ensures that the extracted job is routed through the configured and not the default workflow.

The Administrator can also configure workflows for jobs that go through the initial Dispatch Component. Custom workflows, in fact, can be applied to a job at virtually any stage of processing. For more information, contact Omtool Sales.

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Virtual Queues

AccuRoute V3.01 Feature Pack 3 introduces a new category of queues called virtual queues. The Administrator will need to provide a name, an associated e-mail as well as the base queue (non-virtual) name to use as a template for the virtual queue. The virtual queue then inherits all its properties from the non-virtual queue dynamically.

Virtual queues can minimize administrative overhead costs by allowing the Omtool Administrator to modify only the base queue to apply changes and all associated virtual queues will automatically inherit and reflect these changes.

To an end user, a virtual queue will appear as an actual queue. For information on how to configure a virtual queue, consult the AccuRoute v3.01 FP3 Installation and Configuration Guide.

Enhancement to the Data Extractor Component

Note As of this release, the Barcode Extractor Component has been renamed to the Data Extractor Component.

The capabilities of the Data Extractor Component have been extended to support Text PDF form identification and Zonal Field Extraction.

ZonalForms identify the Text based PDF using a set of one or more locations (for example, Page number and PDF coordinates on the page) and a regular expression to match the extracted text against. If the set matches then it is assumed the form is properly identified.

The Default Form Library is automatically created during installation. The Omtool Administrator can manage the Forms in the Default Form Library via the Forms tab in the Data Extractor Component Properties page. However, the Administrator cannot add or remove Form Libraries.

Note For this release, we only support single page form per job being attached.

Enhancement to the AccuRoute Component: Image-In Queue

Administrators now have the ability to set property values as part of the Image-In Queue workflow action. The Queue Workflow Rules Properties dialog has been modified to include a new "Set Additional Properties" button.

When configuring a queue workflow, the Administrator can specify configured properties with values to be applied to a queue after an action is executed.

Note The values will be set after the action is applied. The values will support substitution.

For configuration instructions, consult the AccuRoute v3.01 Feature Pack 3 Installation and Configuration Guide.

Enhancement to the Image-In Connect (IIC) Node: Apply Property Formatting

When the scraped data in Image-In Connect is associated to a pre configured property, the configured property formatter will be applied to the property before storing the data.

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Note If there are configured prompts for the selected action then the user entered data will be formatted according to the property formatting definition.

For instructions on how to configure property formatting, refer to the AccuRoute v3.01 Feature Pack 3 Installation and Configuration Guide.

New AccuRoute Component: Collection Locator

A Document Collection is a collection of documents with the same property and index metadata. You can route documents to a Document Collection by specifying the Document Collection Key property for the associated job. The Document Collection Key property acts as a locator key and helps the Data Extractor Component to identify and route documents to the correct Document Collection. The exact location of the Document Collection can be an active queue or it may be a specific queue destination (for example, an Archived Volume List).

Note Since a Document Collection can be uniquely identified by more than one AccuRoute property, the Administrator can configure one or more Document Collection Keys (for example BOL or FileNumber) if needed.

New documents added to a Document Collection will automatically have the metadata associated with existing documents applied to them.

For information on how to configure the Document Collection Locator Component, consult the AccuRoute v3.01 FP3 Installation and Configuration Guide.

Omtool Client Features

AccuRoute Web Client v3.06

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.

AccuRoute Web Client v3.06 includes:

- Ability to search a Volume List using a date range as search criteria.

  If the Date/Time property is indexed on a volume, the AccuRoute Web Client search page will show a single edit box where the user can specify the date range as the search criteria.

- Ability to delete a record found via the Archive Search option.

  The AccuRoute Web Client user can select one or multiple records and delete the records from future searches. This will not actually delete the record, it will simply mark it as deleted in the Volume List so that users will be able to see them.

Note Delete can only be applied to non-Active Volume Lists. Any item in an Active Volume Lists would need to be removed via Image-In Queue Client.

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The Omtool Administrator must grant the permission to delete records to an AccuRoute Web Client user. If the permission is not configured, the user will not see the Delete option on the AccuRoute Web Client.

- Ability to scan/upload additional documents via the Archive Search option.

  The AccuRoute Web Client user can scan additional documents using the Archive Search option. To submit additional documents, the user will select an item from the search result and click the Scan Additional/Upload Additional button. A routing Sheet is generated and the additional documents are routed to the volume where they are associated with the original document by copying their metadata.

  The user can only submit additional documents to associate with one search record. If the user selects more than one item, it will result in an error.

- Ability to correct returned meta data

  The AccuRoute Web Client user can correct incorrectly indexed records. The Archive Search results page has been enhanced to have an Edit button to allow the AccuRoute Web Client users to correct incorrect metadata.

  The Omtool Administrator must grant the permission to edit records to an AccuRoute Web Client user. If the permission is not configured, the user will not see the Edit option on the AccuRoute Web Client.

Image-In Queue v3.2

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 Queue v3.2 includes:

- **Queue filter** - When setting up a queue, the Omtool Administrator can define the items that will get listed for display. This includes items that are currently assigned to other queues.
- **Allow read only viewing of a queue** - When setting up a queue, the Omtool Administrator can disable the automatic locking of a document if selected in the Image-In Queue client for modification.

  Users in Image-In Queue with the read only permissions will be able to read/view documents. They will not have the ability to modify documents.
- **New folder hierarchy structure** - Image-In Queue v3.2 offers a completely configurable mechanism where the Administrator can configure the folder hierarchy to support their workflow specific requirements.
- **Restructuring of automatic subgroup folders** - Administrators can setup folder sublevels where each level is defined by one property.
- **Restructuring Deficiency structure in folder view** - A new Deficiencies folder view has been introduced to allow one row per deficiency, such that jobs with multiple deficiencies will be (n) entries in the listing. This will allow the Image-In Queue operator sorting and grouping capability using the normal list view mechanism.
- **Enhancements to Rescan deficiency processing** - When a rescan job is selected, the IIQ pane will display a side-by-side preview of the original scanned page in the existing preview area with Accept and reject options.

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- Accept will apply the current processing, updating the original document with the new scanned page. The rescan deficiency will be marked as resolved.
- Reject will prompt the IIQ user to see if there is need to re-issue a rescan deficiency (by generating a new routing sheet) or not. In either case the original deficiency will be marked as resolved.

- **Editing metadata at the folder level** - Image-In Queue operators can now set the metadata value at the folder level. The IIQ user will use the CTRL+ V action to paste the previously applied meta data to proper edit fields. The data is automatically validated and also saved on successful validation.

Note The Paste button in the Edit Data dialog applies the previously applied meta data to proper edit fields.However, user will need to manually save the metadata unlike the CTRL+ V action where the data is saved on validation.

- **Handling 'missing-documents' at folder level**.
- **Handle "notes" across documents**.
- **Send to AccuRoute (selected items/folder)** - A new context menu option has been added to both the Folder & Item(s) objects. When selected the AccuRoute Desktop opens and the selected items is attached to the new message. Any metadata available for the selected item are passed to the AccuRoute Desktop. The user can add recipients and send the message. Or the user can save the Embedded Directive for future use.
- **Enhance assign to queue to allow "as copy"** - The **Reassign Selected Item** option has been enhanced to allow the Image-In Queue operator to assign a copy of the selected item rather than moving the actual item to the specified Queue.
- **Streamline splitting a multi-paged document**.

Omtool Workflow Integration Application

The Omtool Workflow Integration Application includes:

- Support selection of a folder versus an individual item.
- Support filtering based on passed-in criteria (such as user or client).

AccuRoute Server Monitor

AccuRoute Server Monitor is a Windows service that monitors the AccuRoute Server environment.

Note The AccuRoute Server Monitor should always be installed on a Windows 2008 64-bit system or a Windows 2003 64-bit system.

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AccuRoute v3.01 Feature Pack 2

Release date: May 2011
Version 5242011

The following is a summary of features specific to AccuRoute V3.01 Feature Pack 2.

	Features
AccuRoute Server Features	RTF Composer Update (27)
	Enhancement to the Image-In Queue Component (28)
	New Criteria for Routing Rules: Job Properties Match Expression (28)
	Support for Fax Service Providers (28)
	Support for MEDITECH Validator (29)
	Support for Worldox® GX2 (29)
Omtool Client Features	AccuRoute Desktop Client v3.04 (29)
	AccuRoute Web Client v3.04 (29)
	Image-In Queue v3.11 (30)
	Installing and Configuring the Fax Service Provider (RSP) Receiver (32)

AccuRoute Server Features

RTF Composer Update

The AccuRoute v3.01 RTF Composer Update will replace the third party vendor Cimmetry/VCET/AutoView's Compose engine with the new RTF Composer engine. The RTF Composer engine will handle RTF, OMTPL, and TXT file conversion. (Even though TXT file conversion is not enabled by default, the TXT files will be processed by the Active PDF Compose engine.)

> *Note* As of January 2011, Omtool™ no longer supports document conversion using the third-party vendor Cimmetry/VCET/AutoView.

The RTF Composer Update will:

- Remove the following Cimmetry file conversion extensions: DOC, DOCX, OMPTL, PPT, PPTX, RTF, XLS, XLSX
- Remove all Cimmetry compose rules from the AccuRoute database.
- Create new rules for the RTF, OMTPL and TXT for the RTF Composer engine.
- Add the following RTF Composer conversion extensions: OMPTL, RTF, TXT (TXT is not enabled by default).

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- Copy a new **omComGFTemplateU.exe** file and register a new compose interface.
- Copy a new **omfResU.dll** to the languages folder which will include the conversion engine display strings for the Administrator.

Note Although the output from the RTF Composer engine will not exactly match the output from the Cimmetry Compose engine, (some of the alignment, margins, table formation may be different), it will not be significantly different from Cimmetry engine output.

At this time, the RTF Composer engine is not able to replace support for all the file types that were supported by the Cimmetry Compose engine. The following file types are no longer supported using the Cimmetry engine:

- XLS
- XLSX
- DOC
- DOCX
- PPT
- PPTX

The suggested workaround is to use MS Word for DOC and DOCX, MS Excel for XLS and XLSX and MS PowerPoint for PPT and PPTX file conversions.

Enhancement to the Image-In Queue Component

The Image-In Queue Component has been enhanced to validate all required properties of a queue that have no specific validation criteria for validation. If a property, therefore has no criteria, it will be marked valid.

The new validation rules can potentially alter some existing workflows that were created with the assumption that a required property without validation is invalid until it is manually configured in the Image-In Queue Client. The workaround to correcting any altered workflow is to have a length requirement for that property during validation.

New Criteria for Routing Rules: Job Properties Match Expression

You can configure inbound and outbound rules so that when a job matches an expression, it is routed to the specified location.

For instructions on how to create a rule that matched an expression AccuRoute v3.01 Feature Pack 2 Installation and Configuration Guide.

Support for Fax Service Providers

The AccuRoute Server can be configured to route documents to the following Fax Service Providers:

- Premiere Global (PGi)
- Open Text RightFax.

The configuration involves adding an AccuRoute Connector for Fax Service Connector.

For instructions on how to add an AccuRoute Connector for Fax Service Provider, refer to the AccuRoute v3.01 Feature Pack 2 Installation and Configuration Guide.

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Support for MEDITECH Validator

The Omtool Healthcare Suite Connector for MEDITECH gathers patient information from MEDITECH and routes this information to the ObjectArchive database or other some other database for storage and retrieval on demand.

Patient information is usually gathered during patient registration. Information gathered includes billing, lab modules and other related information.

The MEDITECH Validator allows the AccuRoute Server to validate the existence of a patient record in MEDITECH based on specific property values (Medical Record number and the Account number) provided in the routing information.

When a medical report or a medical bill is scanned and sent to the AccuRoute Server for processing, the MEDITECH Validator matches the Medical Record number and the Account number and validates that the information provided are for the same patient in MEDITECH. By validating the existence of the patient, it makes sure that the documents are being routed and stored for the correct patient.

Not only does this validation protect data integrity, but it also eliminates irregularities and inconsistent billing issues.

For instructions on how to configure Data Validation, refer to the AccuRoute v3.01 Feature Pack 2 Installation and Configuration Guide.

Support for Worldox® GX2

World Software WORLDOX GX2 has been qualified for use with AccuRoute V3.01 Feature Pack 2. For configuration instruction, consult the AccuRoute v3.01 Feature Pack 2 Installation and Configuration Guide.

Omtool Client Features

AccuRoute Desktop Client v3.04

AccuRoute Desktop Client is an intelligent client side application that resembles a desktop e-mail 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 v3.04

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.

AccuRoute Web Client v3.04 includes:

MyFiles feature - Similar to the MyAccuRoute feature, MyFiles allows AccuRoute users to scan and route documents to themselves. In the AccuRoute Web Client application, the user will access the MyFiles page and create My Routing Sheet. Using this Routing Sheet, all documents scanned at a device will be routed to the MyFiles page. Users can then route the document to a repository for storage or send them to other fax or e-mail recipients for further processing as needed.

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Image-In Queue v3.11

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 Queue v3.011 includes:

- **Ability to automatically select the next record when the Release option is selected** - The selected record is locked so that you have exclusive access to it for modifications.
- **Ability to select and release multiple records simultaneously** - This enhancement allows faster and more efficient record processing in a queue.
- **Ability to select next record** - When a record leaves an IIQ folder after any operation in IIQ or outside of IIQ, if an appropriate next record is available it is automatically selected.
- **Ability to release a record folder** - Image- In Queue v3.1 allows you to select a record folder, right click and select the Release All option from the drop down menu to release all the records in the folder. The operator can cancel the release after each individual record is processed. In case of invalid data or some other anomaly in a record, the operator will be presented with a reconciliation dialog. When the operator cancels the release of that particular record, the whole release operation is cancelled.
- **Property Expressions feature** - This feature allows a job to be processed based on the on the values of properties. For example, the Administrator can configure jobs to be released from Image-In Queue based on a property expression.
- **Route to multiple Queues for Rescan deficiency** - When a Rescan deficiency is created, an Embedded Directive is created for the Rescan routing sheet, and this Embedded Directive has a recipient that is an IIQ type recipient with a destination of "IIQ".

  In this version of Image-In Queue, the Rescan Embedded Directives have the ability to distinguish which Queue it came from and set the destination based on that. The Rescan IIQ recipient is set to the document's queue e-mail address at the time the deficiency is added. In prior Image-In Queue versions, there was no way to route jobs to multiple queues for a Rescan.

  Route to another Queue - Image-In Queue allows you to route a job to a different Queue using the action Reassign Queue in a workflow.
- **Validation allows for automatic field formatting** - Administrators can configure a set of property formatters in the Formatting tab of the Property Dictionary Item configuration page in the Omtool Server Administrator. The property formatters take a client user's entered value and converts it to another value. The possible formatters are upper/lowercase, add prefix, add suffix, insert characters, replace characters, and remove characters. A formatter is configured with a regular expression to match against and one or more formatting actions to take when a match occurs.
- **Cursor advancement** - The cursor automatically moves to the next document in list view as soon as the previous document has been processed.
- **Support for automatic validation of meta data** - Data no longer needs to be validated manually by opening the Edit Data dialog. If the automatic validation is successful, the jobs are release from the queue.
- Edit Data enhancements:
  - Edit Data selects first non validated field - When the Edit Data dialog opens, the cursor is placed in the first field that has not been validated.

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- Edit Data Validation on tab - If an item is configured for validation and for validation pullback, validation occurs when the TAB key is pressed. The green and red check boxes are updated. However, confirmation is not shown until the OK button is pressed.
- Edit Data controls match their configured types set in the Property Dictionary Item in addition to Edit text boxes.
- Image-In Queue data entry is streamlined
  - Edit Data dialog can be shown or hidden through toolbar button or a menu item. You can also click on a page outside of the dialog box without having to close it first.
  - Edit Data dialog automatically tracks selection of records. The dialog gets disabled if multiple records are selected.
  - Edit Data dialog is a tool window dialog.
  - Edit Data dialog remembers its location.
  - Edit Data dialog has Apply and Reset buttons. These replace the OK and Cancel buttons in previous releases.
  - Edit Data dialog can be dismissed by clicking on the [X] close button on the window title.
  - Edit Data dialog provides a way to reconcile changed data when record selection changes. The operator will be prompted to apply the changes or discard the changes.
- Edit Data dialog allows the operator to paste previously applied data. The operator will use the ALT+ V action to paste the previously applied meta data to proper edit fields. The data is automatically validated and also saved on successful validation.

  Any data, copied to the buffer during the process of meta data copy paste operation, is applied to the selected record in the list view. As soon as the data is applied, validation occurs. If there is a problem the Edit Data dialog opens and it shows the error.

Note The data in the buffer comes from the last successful Apply of data from the Edit Data Dialog.

- Edit Data option is available as a right click menu option from a folder within in Image-In Queue.
- Double-clicking a document opens the Edit Data Dialog or transfers focus to an already open Edit Data dialog.
- Image-In Queue operators can open the Edit Data dialog by pressing the Enter key from the list view.
- Edit data fields match the required properties for the queue when multiple queues exist.
- Deficiency enhancements:
  - The Omtool Administrator can define which deficiencies should be associated with a Queue.
  - The Omtool Administrator can define which deficiency is the default for a Queue.
  - The Omtool Administrator can define properties that much be valid for a Queue before a deficiency can be assigned to it.
  - Batch the deficiency e-mail sent to doctors - Instead of sending a separate e-mail for each deficiency, Image-In Queue allows you to batch the notifications for the patient's chart and send one e-mail at a specific time of the day (for example, at midnight).

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- Image-In Queue operators can now control the placement of the E-signature deficiency. When assigning a deficiency, the operator is now prompted to place the E-signature location annotation in the correct spot before a notification is sent to the assignee.
- Image-In Queue operators can assign multiple deficiency types in the Deficiency page. In previous versions, they could only assign one type.

Installing and Configuring the Fax Service Provider (RSP) Receiver

Before you install the FSP Receiver, make a note of the UNC path specified for the Common Pickup Folder, located on the Advanced tab in the AccuRoute Connector for Fax Service Provider. You will be prompted for this information during the FSP Receiver installation.

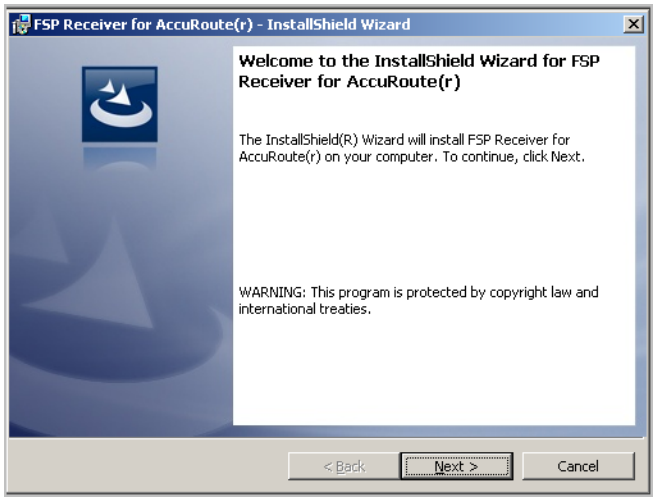
1. On the server create the following directory:

   `C:\Program Files (x86)\omtool\Omtool Server\omFSPReceiver\`

2. Navigate to the AccuRoute Clients share folder and then go to the FSPReceiver folder with the setup files:

   `C:\Program Files (x86)\omtool\Omtool server\Clients\FSPReceiver and run setup.exe`

3. Double click **setup.exe** to install the application. The InstallShield Wizard configures your system for installation and shows the **Welcome** message.



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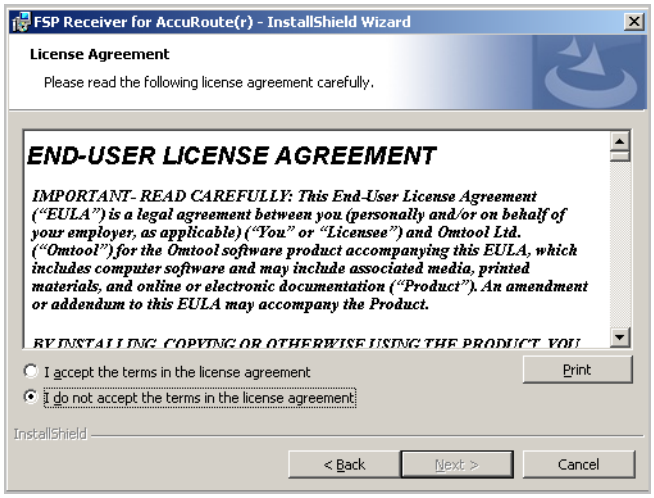
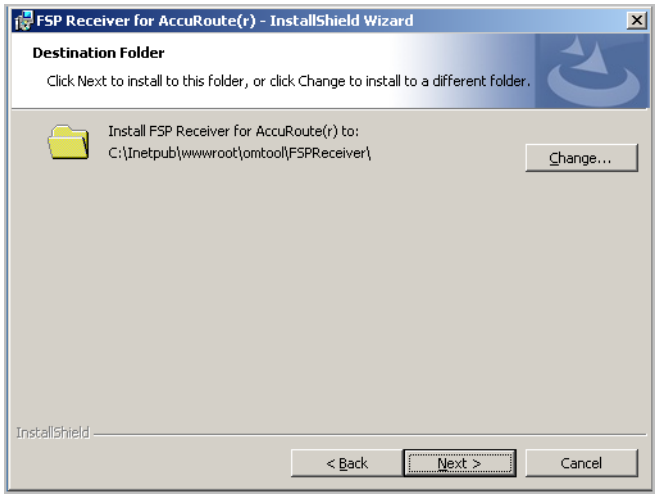
4 Click **Next**. The **License Agreement** page opens.



5 Read the license agreement and if you agree to the terms, click **I accept the terms in the license agreement** option.

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



7 Install to the **omFSPReceiver** directory you created in step 1 by browsing to:

`C:\Program Files (x86)\omtool\Omtool Server\omFSPReceiver\,`

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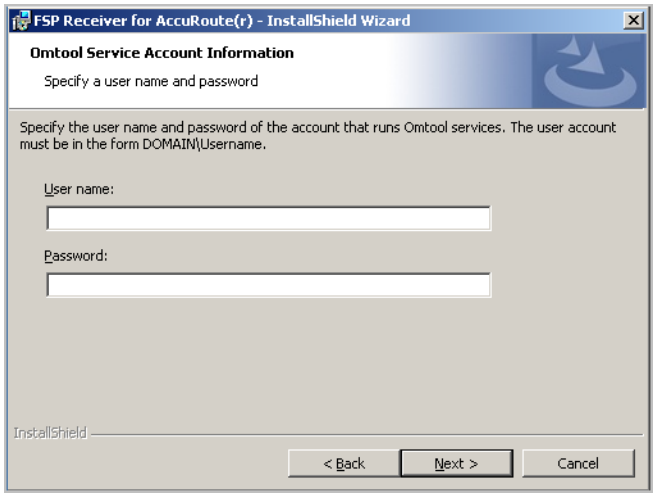
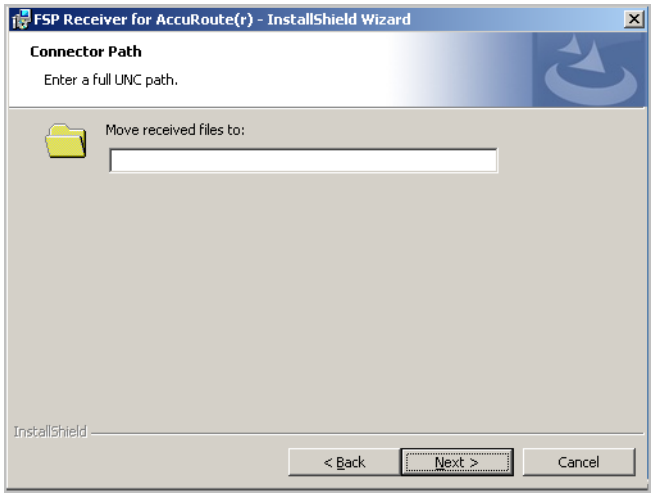
8 Click **Next**. The **Omtool Service Account Information** page opens.



9 Enter the service account credentials (**User name** and **Password**).

10 Click **Next**. The **Connector Path** page opens.



11 Provide the UNC path for the share as found in the FSP PGI connector properties, Advanced tab, listed as the Common pickup folder. For example:

`\\{Server_name}\OMTOOL\WORK\FSP\PGI\PICKUP\`

where **{Server_name}** is the name of the AccuRoute Server.

12 Click **Next**.

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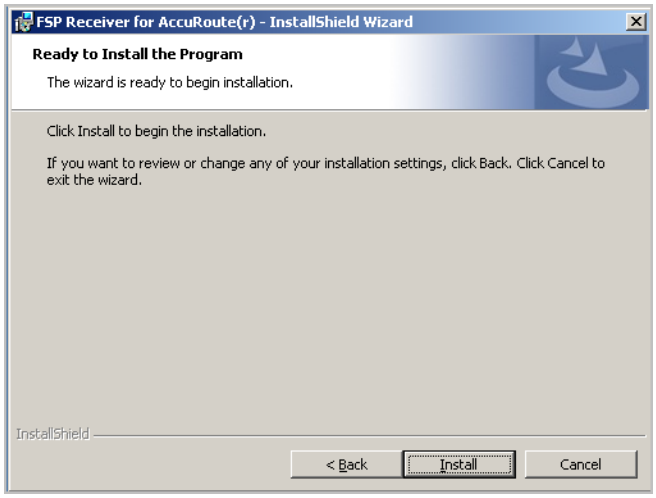
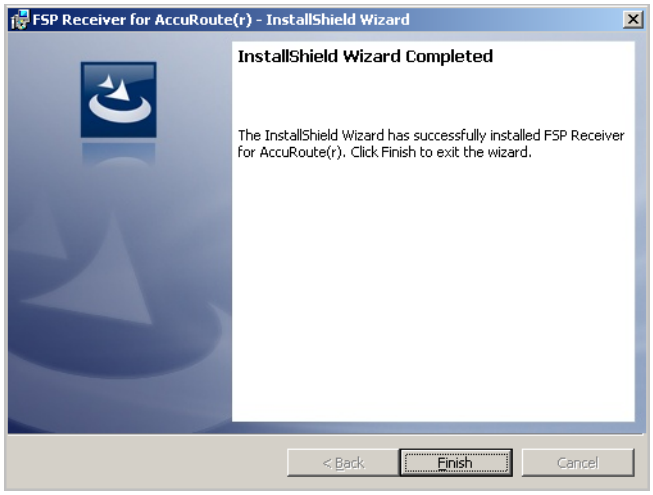
13 The **Ready to Install the Program** page opens.



14 Click **Install** to begin the installation. When installation is complete. you see the **InstallShield Wizard Completed** page.



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

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AccuRoute v3.01 Feature Pack 1

Release date: February 2011
Version 2162011

The following is a summary of features specific to AccuRoute V3.01 Feature Pack 1.

	Features
AccuRoute Server Features	Data Validation Enhancements (36)
	Document Action Log (37)
	PDF Forms Generator (37)
	Volume List Extensions (38)
	Volume List Restrictions (38)
Omtool Client Features	AccuRoute Desktop Client v3.03 (39)
	AccuRoute Web Client v3.02 (39)
	Image-In Acquisition Client v3.0.2.0 (39)
	Image-In Queue v3.02 (39)
	Image-In™ Connect v1.00 (39)

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 previous 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 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.

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For instructions on how to configure Data Validation, refer to the AccuRoute v3.01 Feature Pack 1Installation 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 1Installation 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**

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

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Omtool Client Features

AccuRoute Desktop Client v3.03

AccuRoute Desktop Client is an intelligent client side application that resembles a desktop e-mail 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 1Installation 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, e-mail 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.

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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 an 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 an 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.

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- **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.

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AccuRoute v3.01 Feature Pack 1

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