
Image-InTM Queue Installation and Configuration Guide

For AccuRoute[®] v3.01

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Section I: Introduction

This guide contains instructions on installing and configuring Image-In Queue desktop client application. The intended audience of this guide are administrators with advanced knowledge of the AccuRoute Server.

This section includes:

- [Introduction](#) (I-1)
- [How Image-In Queue works](#) (I-1)
- [New in this release](#) (I-2)
- [Deployment summary](#) (I-3)
- [Related documentation](#) (I-3)

Introduction

Image-In Queue is a desktop component of Omtool's enterprise AccuRoute document management system that 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 e-document delivery and management system. The advantage of using Image-In Queue is that it processes documents in a workflow bound for a document management system (or Object Archive™). For information on Image-In Queue and other AccuRoute products, visit the Omtool products Website at:

<http://www.omtool.com/products/ImagInQueue.cfm> and call Omtool Sales at Sales@Omtool.com.

How Image-In Queue works

The Image-In Queue (also referred to as IIQ) software processes scanned documents that are routed to predefined Queues as messages. The documents can be scanned into IIQ using Omtool's Image-In Acquisition Client software or from a multifunction device. The Queues are pre-configured in the Omtool Server Administrator where the Administrator assigns access rights and permissions to predefined user Groups.

When an Image-In Queue operator logs into IIQ, the user has access to all scanned documents in the Queue. The user can open a new document for processing, assign deficiencies (that is mark them as lacking in requirement information) or route the document to a specific destination. To maintain data integrity, only one IIQ operator can view/process a document in IIQ at any given point in time. However, if a document was opened for processing and was not freed up after a specified length of time, it is automatically freed up for processing.

The IIQ operator can perform various tasks while processing messages. They can, for example:

- Route documents to a specific destination (for example, email, fax, printer or ObjectArchive).
- Assign deficiencies (note missing information and send them to users who can provide the missing value). For example, you notice a missing signature and assign an e-sign request on it and send it to the person who should be providing the e-signature.
- Merge and split documents, manually release a lock or move a document to processed depending on assigned permissions (by the Omtool Server Administrator).

New in this release

Image-In Queue v3.01 has many new features and enhancements as listed below. For details on how to configure AccuRoute Server for the new features to work, see [Appendix: Configuring AccuRoute Server for Image-In Queue](#).

Access to Queues - Access to Queues are controlled and configured by the Omtool Server Administrator. For example, the Administrator will configure the Image-In Queue operator processing invoices to have access to the Invoice Queue. For more information, see [Configuring Queue Access](#) (6-11).

Adaptable User Interface - The Image-In Queue desktop has an adaptable top right pane where the Omtool Server Administrator can choose the properties to display as columns. [Configuring ObjectArchive](#) (6-14).

Customizing folder display name - The name of the folders in the left pane of the IIQ desktop can be customized by the Omtool Server Administrator. For more information, see [Customizing Folder name](#) (6-17).

Default destination - A queue can be configured to have a default destination. The advantage of configuring a default destination is that when the Image-In Queue operator releases a document, he need not specify the destination as it is already configured for him. For more information, see configuration instructions for the destination tab in [Creating Queues](#) (6-2).

Deficiency enhancement - New deficiency types are supported. Supported deficiency types are Approval, E-sign, Data Required, Data and Approval Required and Rescan Required. For more information, see Image-In Queue online help.

Folder count for each folder - Each folder in the left pane of the IIQ desktop displays a count of the number of documents in that folder.

Folder grouping - This release supports grouping of folders in the left pane. For more information, see [Configuring Folder grouping](#) (6-16).

Login enhancement - In this release, login to Image-In Queue is controlled by Active Directory group configuration rather than individual user configuration. The Image-In Queue operator who is logging in must be a member of a predefined Active Directory user group with access to IIQ. Any user who is not part of the group will not be able to login.

New permissions - The Image-In Queue operator has the ability to edit, merge and split documents, release incomplete documents, etc. along with other newer permissions. These permissions must be enabled for the IIQ operator by the Omtool Server Administrator. Permissions that are new in this release are: Allow data to be edited, Allow document to be annotated, Allow documents to be merged, Allow documents to be split, Allow documents to be released and Allow incomplete documents to be released, and Allow workflow locks to be manually released. For information on configuring permissions, see [Creating Queues](#) (6-2).

Thumbnail control enhancement - Custom thumbnail control use with viewer is supported.

Deployment summary

To deploy Image-in Queue:

- 1 Verify that the AccuRoute Server and the clients meet the requirements. (Go to [Section 2: Requirements](#).)
- 2 Install Image-In Queue (Go to [Section 3: Installation](#).)
- 3 Connect to Image-In Queue (Go to [Section 4: Post installation operations](#).)

Related documentation

AccuRoute Server documentation

- AccuRoute Server Installation Guide - <http://www.omtool.com/documentation/AccuRoute/v3.01/Server/AccuRouteV3.01ServerInstallConfigureGuide.pdf>
- Omtool Server Administrator Help - <http://www.omtool.com/documentation/omtoolserver/v37/admin/index.htm>

Image-In Queue user documentation

- Image-In Queue User Help - <http://www.omtool.com/documentation/AccuRoute/v3.01/IIO/UserHelp/WebHelp/IIOHelp.htm>

A complete list of all documentation related to AccuRoute v3.01 is available at [AccuRoute v3.01 documentation page](#).

Section 2: Requirements

This section includes:

[Server requirement](#) (2-1)

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

[Supported e-mail applications](#) (2-2)

[Note about connecting to AccuRoute Server installed on Windows 2008 system](#) (2-2)

Server requirement

- AccuRoute Server v3.01

Note For AccuRoute Server running on Windows 2008 64 bit system - Allow Dynamic RPC for the local port 135. For instructions, see [Note about connecting to AccuRoute Server installed on Windows 2008 system](#) (2-2)

Hardware and software requirements

Important You can install Image-In Queue on the system running the AccuRoute Server.

The requirements are as follows:

- Pentium®-class processor
- Windows XP Professional SP3
- 20 MB hard disk space

- 64 MB RAM (128 recommended)
- Acrobat® Reader® 9.x/8.x/7.x.

Supported e-mail applications

- Microsoft® Outlook® 2007(Outlook Express not supported)
- Notes 6.5/6.0/5.0
- Novell GroupWise 6.0/5.5

When Image-In Queue is configured to integrate with an address book for a supported e-mail application, the e-mail application must be selected as the Windows default e-mail application. For more information, consult Windows help.

Note about connecting to AccuRoute Server installed on Windows 2008 system

To allow Image-In Queue to connect to AccuRoute Server running on Windows 2008 system:

- 1 In the Windows 2008 system, open the Server Manager.
- 2 Select **WINDOWS FIRE WALL WITH ADVANCED SECURITY**.
- 3 Select **INBOUND RULES** under it, on the right select **NEW RULE**.
- 4 Create a new Windows Firewall Inbound Rule.
- 5 Select **PORT**.
- 6 Select **TCP** and enter port **135** (you will change this port after the rule is created).
- 7 Select **ALLOW THE CONNECTION**.
- 8 Select **DOMAIN, PRIVATE, PUBLIC**.
- 9 Name the rule as appropriate, for example **DCOM RPC** (or something else).
- 10 After rule is created enter the rule's properties.
- 11 Go to the **PROTOCOLS AND PORTS** page.
- 12 Change **LOCAL PORT 135** to **DYNAMIC RPC**.
- 13 Press **OK** to save your changes.

Section 3: Installation

This section includes:

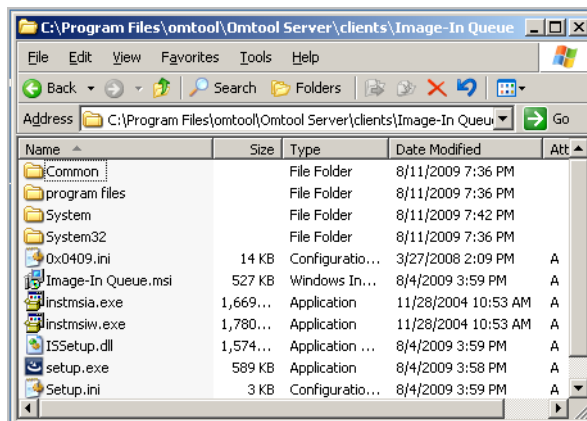
[Accessing the setup files](#) (3-1)

[Installing Image-In Queue](#) (3-2)

[Uninstalling Image-In Queue](#) (3-5)

Accessing the setup files

The Image-In Queue setup files are located in the **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\CLIENTS\IMAGE-IN QUEUE** directory of the system running the AccuRoute Server. If you are installing Image-In Queue on the same system, simply navigate to this folder to access the setup files.



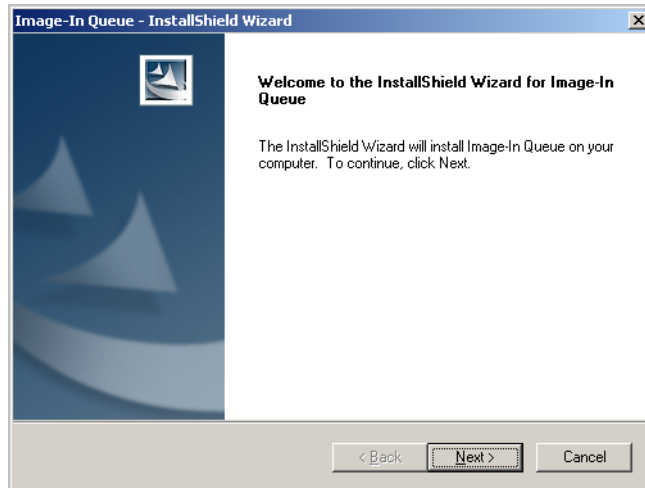
If you are installing Image-In Queue on a separate system, ensure that proper access permissions have been set up for you to access the **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\CLIENTS\IMAGE-IN QUEUE** directory from the system where you are installing Image-In Queue. You can also copy the setup files to a shared network directory.

Note On 64 bit systems, the setup files are located in the C:\Program Files (x86)\omtool\Omtool Server\clients\Image-In Queue directory.

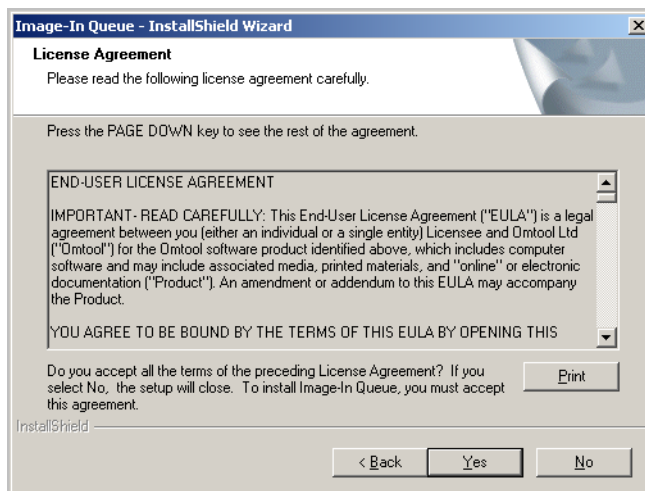
Installing Image-In Queue

To install Image-In Queue:

- 1 Log on to the client using an account that belongs to the Administrators group and navigate to the directory containing the setup files.
- 2 Click **SETUP.EXE**. The InstallShield wizard configures your system and shows the **Welcome** message.

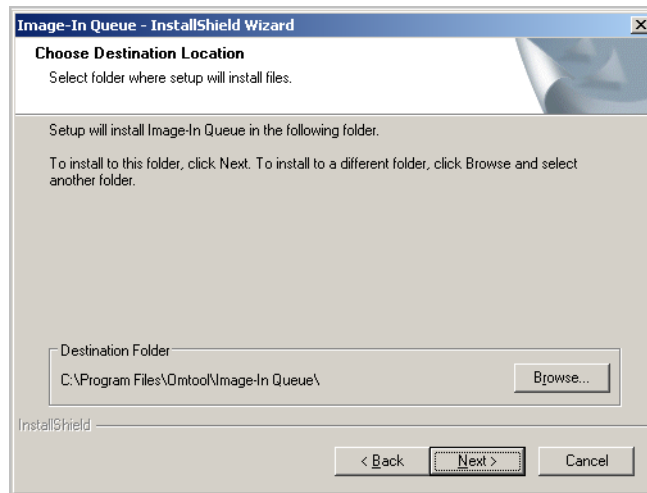


- 3 Click **NEXT**. The setup shows the license agreement.



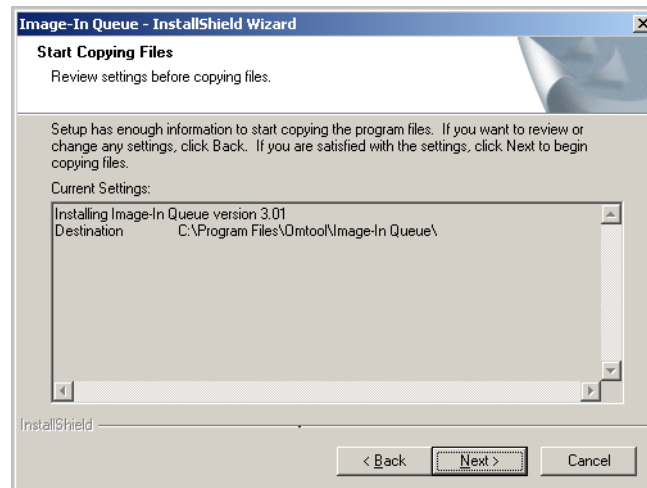
- 4 Read the agreement carefully and if you agree to the terms, click **YES**.

The **Choose Destination Folder** page opens. The default destination is **C:\PROGRAM FILES\OMTOOL\IMAGE-IN QUEUE**.

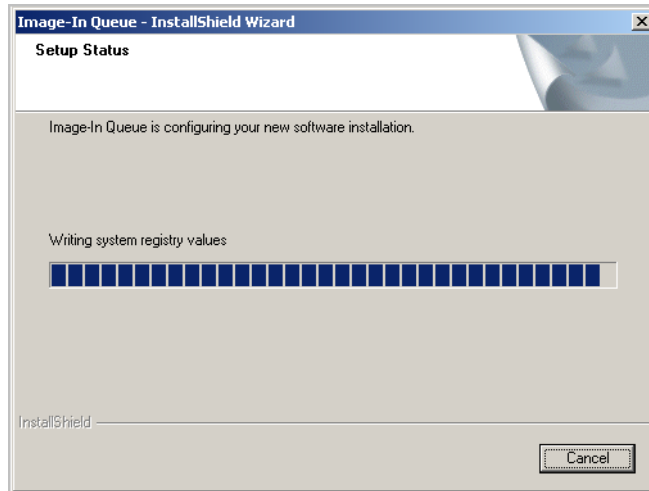


Note On 64 bit systems, the default destination folder is C:\Program Files (x86)\omtool\Image-In Queue.

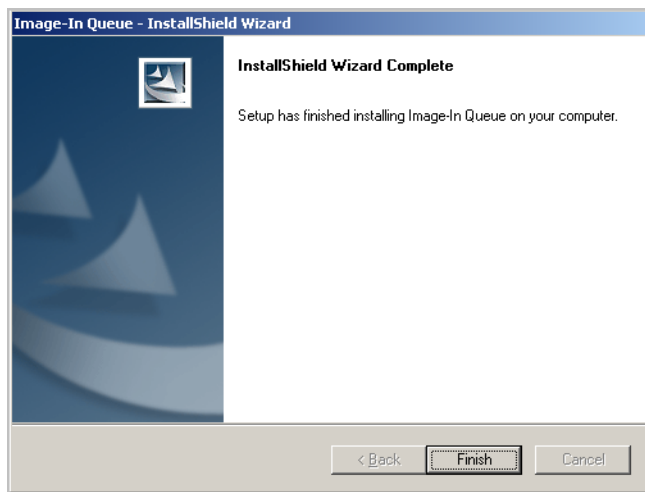
- 5 Click **NEXT** if you want the default destination. The **Start Copying Files** page opens listing installation details you have supplied. If you want to install in a non-default location, click **BROWSE** and then select the desired location and then click **NEXT**.



- 6 Click **NEXT** to begin the installation.



- 7 When installation is complete, you see the **InstallShield Wizard Complete** message.



- 8 Click **FINISH** to close the wizard.

Running Image-In Queue setup in silent mode

To run Image-In Queue setup in silent mode:

- 1 Log on to the Omtool Server with an account that belongs to the Administrators group on the client, for example, a member of the Domain Admins group.
- 2 Open a command prompt.

- 3 Change the current directory to the one containing the setup files. The default location is **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\CLIENTS\IMAGE-IN QUEUE**.

Note On 64 bit systems, the setup files are located in the C:\Program Files (x86)\omtool\Omtool Server\clients\image-in Queue directory.

- 4 To install Image-In Queue in silent mode for the first time, record a response file: `C:\Program Files\omtool\Omtool Server\clients\Image-In Queue\setup.exe /r /v"/qn`
This will display the UI and also install the application. It also creates C:\Windows\setup.iss file.
- 5 Copy the setup.iss file to the following location **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\CLIENTS\IMAGE-IN QUEUE**.

Note For 64 bit systems, the path is **C:\PROGRAM FILES (X86)\OMTOOL\OMTOOL SERVER\CLIENTS\IMAGE-IN QUEUE\SETUP.EXE**

- 6 To install Image-In Queue in another system, run: `setup.exe /s /v"/qn`
This installs Image-In Queue to the default location:
C:\PROGRAM FILES\OMTOOL\IMAGE-IN QUEUE.
- 7 Optionally, to change the location, set the property `INSTALLDIR`, run `setup.exe /s /v"/qn INSTALLDIR=<short name path>` where `<short name path>` is the short name path to the target folder. (The entire path must be in short name format. For example, if the long path is J:\Program Files\Omtool\image-in Queue, then the short path is C:\Progra~1\omtool\image~1.)

Note Add (x86) after Program Files for 64-bit systems.

Tip The command for short name conversions is `dir /x`. Run this command in any directory to return the short names of all folders in that directory. For example, to do a short name conversion on J:\Program Files, change the current directory to J:\ and run `dir /x`.

Verify that Image-In Queue is installed on the client by navigating to **...\OMTOOL\IMAGE-IN QUEUE** on the client and verifying that the Image-In Queue program files are installed.

Uninstalling Image-In Queue

To uninstall Image-In Queue:

- 1** Click **START > CONTROL PANEL > ADD OR REMOVE PROGRAMS**.
- 2** Select **IMAGE-IN QUEUE** and click **REMOVE**.
- 3** Follow the prompts to remove the application.

To verify that Image-In Queue is removed from the client, browse the directory structure on the client and verify that **...\\OMTOOL\\IMAGE-IN QUEUE** has been removed. (The Omtool directory remains if other Omtool applications are installed on the client.)

Section 4: Post installation operations

This section includes:

[Connecting to Image-In Queue](#) (4-1)

[Note about connecting to AccuRoute Server installed on Windows 2008 system](#) (4-2)

Connecting to Image-In Queue

To connect to Image-In Queue Queue:

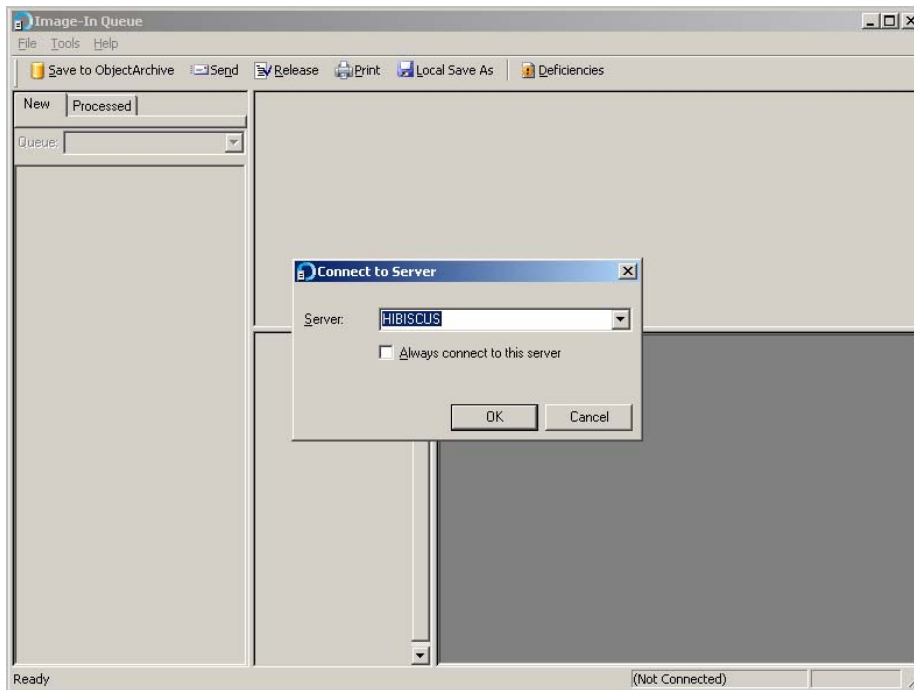
- 1 Login to the system as a member of a Group with access rights to Image-In Queue.

Note When you launch Image-In Queue, it automatically pulls your Windows authentication information. If the authentication used does not have access permissions to a predefined Queue, you will not be able to login.

The Omtool Server Administrator, when creating a queue, defines which Group has access to the Queue. In addition, the administrator also defines the types of permissions the Group has. In order to login to Image-In Queue and access your Queue, you must be a member of the defined Group which has access to a Queue.

- 2 Click **START > ALL PROGRAMS > OMT00L> IMAGE-IN QUEUE** to launch the application.

3 You are prompted to connect to an AccuRoute Server.



- 4 In the **SERVER** drop down, select the AccuRoute Server name and enter the IP address of the AccuRoute Server.
- 5 Click **OK**.

For instructions on how to use the Image-In Queue client, consult the [Image-In Queue online help](#).

Note about connecting to AccuRoute Server installed on Windows 2008 system

To connect to an AccuRoute Server installed on a Windows 2008 system, follow the instructions in [Note about connecting to AccuRoute Server installed on Windows 2008 system](#) (2-2).

If you are connecting to an AccuRoute Server running on a Windows 2003 system, check [Image-In Queue fails to connect to AccuRoute Server installed on Windows 2003 system](#) (5-2)..

Section 5: Troubleshooting

This section includes:

[Manual Release option is not working in IIQ](#) (5-1)

[Details entered in the Routing Transaction Description section of the Route Selected Item dialog are not retained](#) (5-1)

[When merging documents, IIQ is creating a folder called \(No value\) and it is putting the merged documents there](#) (5-2)

[Image-In Queue fails to connect to AccuRoute Server installed on Windows 2003 system](#) (5-2)

[Changing the mail type for Image-In Queue application](#) (5-3)

Manual Release option is not working in IIQ

Problem:

Even after Allow documents to be released and Allow incomplete documents to be released options are enabled for an IIQ group, invoices released by IIQ operator are not archived to OA database. Instead the invoices are held in New Items folder.

Solution:

For the Release feature to work, the Queue workflow rules must be configured by the Omtool Server Administrator where the **Manual Release** rule should have the highest precedence. If you are not setup with the required Queue workflow configuration, you will not be able to use this feature.

To set up Manual Release Queue workflow rule, see [Creating Queue Workflow rules](#) (6-6).

Details entered in the Routing Transaction Description section of the Route Selected Item dialog are not retained

Problem:

When sending a message, any details you enter in the Name, Company and Comments text box in the Routing Transaction Description text box are not retained.

Solution:

You must enter the information in the `omNotification-IIQ.omtpl` template as shown below:

Name : %SENDER_CUSTOM1%

Company : %SENDER_CUSTOM2%

Comments : %SENDER_CUSTOM3%

The value set by the IIQ operator will replace the matching value found in the %%, and will remove percents as well.

When merging documents, IIQ is creating a folder called (No value) and it is putting the merged documents there

Problem:

When merging multiple documents, they are being put in a folder called (No value).

Solution:

This is happening because prFolderID is not set as a required property. IIQ only merges required properties, so the newly merged item is stripped of the original folderID set in the original documents.

To correct this issue,

- open the Queue properties page
- go to the Properties tab
- add the FolderID message property at the top list for required properties

Image-In Queue fails to connect to AccuRoute Server installed on Windows 2003 system

Problem:

Image-In Queue cannot connect to AccuRoute Server installed on a Windows 2003 system.

Solution:

This may be happening because Windows firewall on the Windows 2003 system is turned on.

You can turn off the firewall and test whether the Image-In Queue application is connecting to the AccuRoute Server. The other workaround to this problem is to add port 135 to the "Exception list" by keeping the Firewall "ON". Here are the steps:

To add port 135 to Exceptions list on Windows 2003 server:

- 1 Go to the **EXCEPTIONS** tab of the Windows Firewall sheet.
- 2 Click **ADD PORT**.
- 3 Enter a name as appropriate, for example, DCOM RPC.
- 4 Enter port number of 135.
- 5 Verify **TCP** is selected.
- 6 Press **OK** to save your changes.

Now you can connect to the AccuRoute Server without any issues.

Changing the mail type for Image-In Queue application

Problem:

To change the mail type, modify the omImageInQueue.xml file in the **C:\PROGRAM FILES\OMTOOL\IMAGE-IN QUEUE\BIN** folder. However, relaunching Image-In Queue results in this error:

```
Failed to initialize email system. (0x80004005) Unspecified error
```

Solution:

To change the mail type, you need to change the mail type of the AccuRoute user.

- 1 Navigate to **C:\DOCUMENTS AND SETTINGS\<LOGGED IN USER'S FOLDER>\APPLICATION DATA\OMTOOL\IMAGE-IN QUEUE** folder.
- 2 Open the omImageInQueue.xml file located in the Image-In Queue folder.
- 3 Search for the `<prMailType></prMailType>` tag.
- 4 Modify the value as necessary. For example, to use Lotus Notes, add the value `lotusnotes`, to use Outlook, add the value `Outlook`.
- 5 Save your changes.

Appendix: Configuring AccuRoute Server for Image-In Queue

The Omtool Server Administrator must configure the AccuRoute Server before the Image-In Queue operator can connect to Image-In Queue and use the application to process scanned documents. Each of these required configurations are explained in the separate topics in this section.

Note These configurations are not a part of installing Image-In Queue. However, without them, Image-In Queue will not work.

This section includes:

[Enabling the IIQ component](#) (6-1)

[Creating Queues](#) (6-2)

[Configuring routing of documents from Image-In Queue to ObjectArchive](#) (6-7)

[Configuring Groups](#) (6-10)

[Configuring ObjectArchive](#) (6-14)

[Optional configurations](#) (6-16)

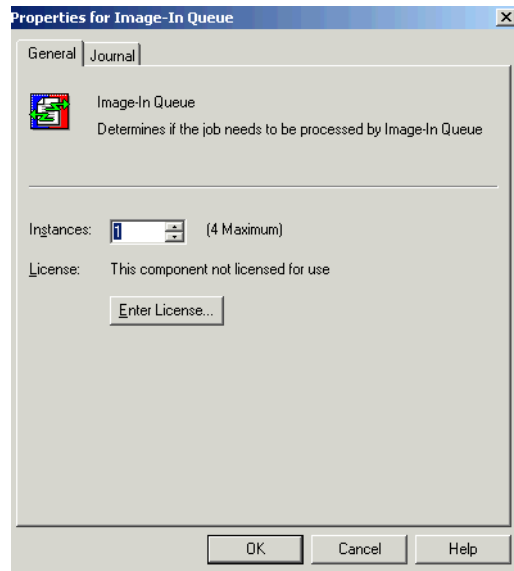
Enabling the IIQ component

Before you can use Image-In Queue, you must manually enable the IIQ component in Omtool Server Administrator using a valid license key. The IIQ license key is available for a separate fee. Contact [Omtool Sales](#) for information.

To enable the IIQ component:

- 1 Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.
- 2 In the console tree, expand the AccuRoute Server.
- 3 Double click **COMPONENTS**. The details pane lists all the components in your AccuRoute environment.

- 4 Double click **Image-In Queue** component to open the **Properties** page.



- 5 Click **ENTER LICENSE** to open the **License** page.
- 6 In the **LICENSE** text box, enter the valid license obtained from Omtool.
- 7 Click **OK** to enable the component.

Creating Queues

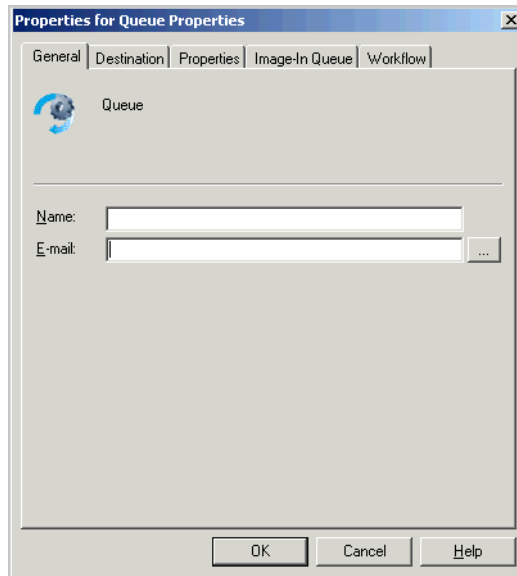
AccuRoute Server Queues are related to the use of the Image-In Queue desktop clients in processing scan jobs. The queue workflow is a series of destinations that a scanned invoice makes while it is in the invoicing process. This process is managed within the Image-In Queue client, but still gives users the option of adding specific data to the invoice to ensure that the correct values are associated with the proper invoice.

You can create multiple Queues to divide a document workflow into logical groups. A Queue can have its own column headings and separate editable fields. These fields must be selected on the basis of the Queue and the destination for the documents in the Queue.

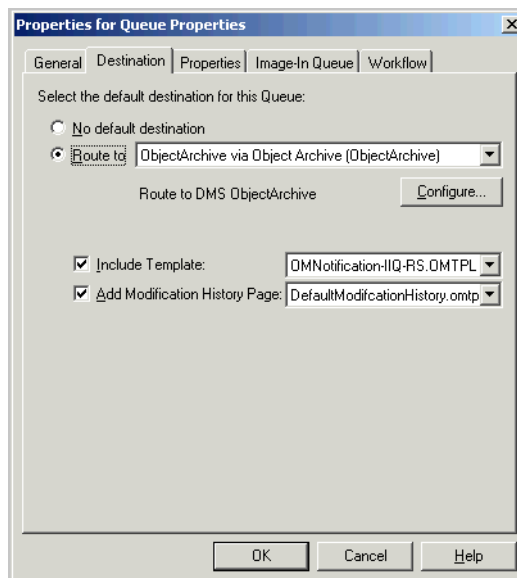
To create a queue:

- 1 Click **START > ALL PROGRAMS > OMT00L > OMT00L SERVER ADMINISTRATOR**.
- 2 In the console tree, expand the AccuRoute Server.
- 3 Right click **QUEUES** and select **NEW > QUEUE**.

The **QUEUE PROPERTIES** page opens.

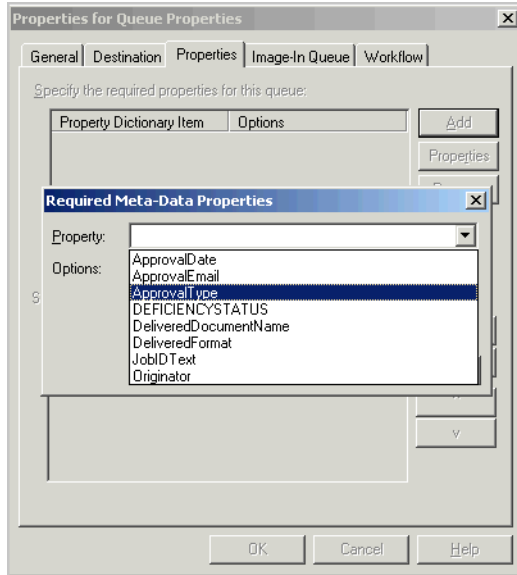


- 4 In the **NAME** field, enter a descriptive name for the Queue, for example Invoice.
- 5 In the **E-MAIL** field, enter an email address for the person who will manage the queue.
- 6 Click **DESTINATION** to open the Destination page.
 - a Select **ROUTE TO** option and from the drop down list, select the destination ObjectArchive DMS Connector. For information on how to configure an AccuRoute Connector for DMS ObjectArchive, see [Creating the AccuRoute Connector for DMS ObjectArchive \(6-9\)](#).
 - b Click **CONFIGURE** and configure as necessary.
 - c Leave the **FORM** drop down empty. Click **OK** to close the page. Note that this will only show up is configuring routing to ObjectArchive.

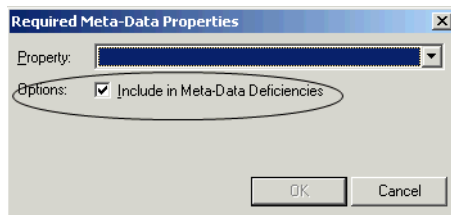


- 7 Click the **PROPERTIES** tab to open Queue property page.

- a In the **Specify the required properties for this queue** section, click **ADD**. The **Required Meta-Data Properties** page opens.
- b From the **PROPERTY** drop down select a property.

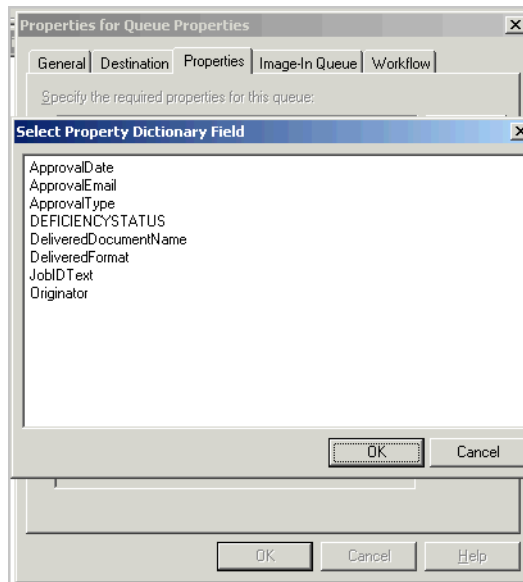


- c Check the box beside **Include in Meta-Data Deficiencies** option if you want AccuRoute Web Client users to see the meta-data properties from the web client.



- d Click **OK** to close the **Required Meta-Data Properties** page. The property is now listed in the **Specify the required properties for this queue** section
- e In the **Specify the properties to display in listings for this queue** section, click **ADD** to open the **Select Property Dictionary Field** page.

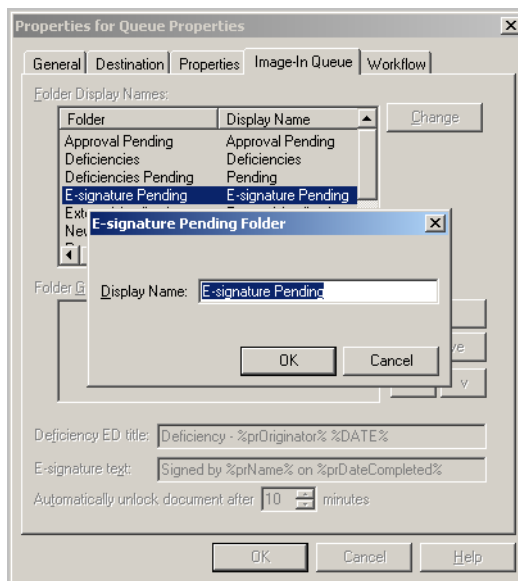
- f Select properties to display in the Image-In Queue client.



- g Click **OK**. The property is now listed in the **Specify the required properties for this queue** section.

- 8 Click **Image-In Queue** to open the Image-In Queue page.

- 9 To customize any folder name, select the folder from the **Folder Display Name** section and click **CHANGE**. A dialog opens displaying the display name text box.



- 10 In the **DISPLAY NAME** text box, enter the customized name to display.

- 11 Click **WORKFLOW** tab to open the **Workflow** page.

- 12 Create workflow rules following instructions in [Creating Queue Workflow rules](#).

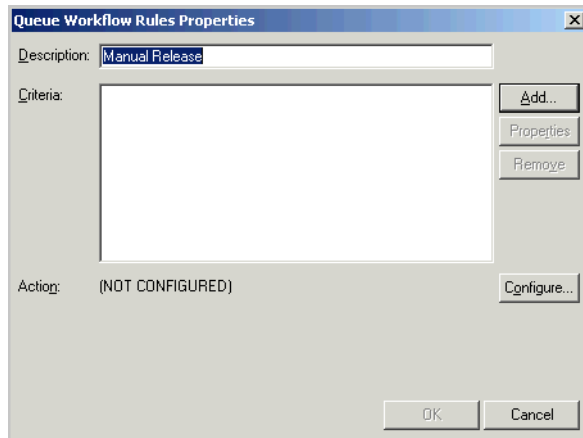
- 13 Click **OK** to create the Queue.

Creating Queue Workflow rules

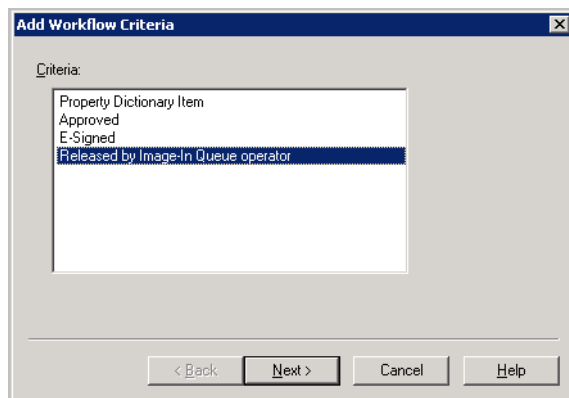
Here is a sample set of workflow rule. Create your own queue workflows following the instructions in below.

To create a queue workflow rule:

- 1 Click **ADD** to add a workflow. The **Queue Workflow Rules Properties** page opens.
- 2 In the **DESCRIPTION** text box, enter **MANUAL RELEASE**.

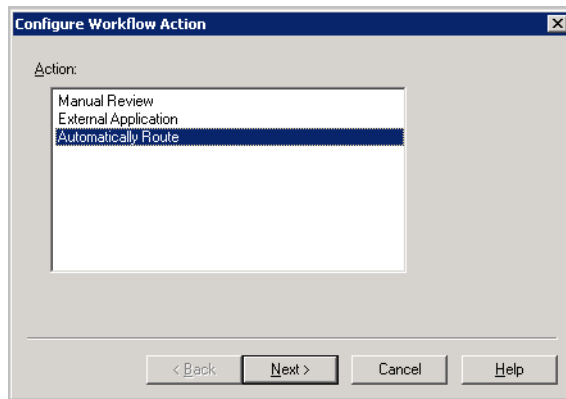


- 3 Click **ADD** in the **Criteria** section to open the **Add Workflow Criteria** page.
- 4 Select **RELEASED BY THE IMAGE-IN QUEUE OPERATOR**.

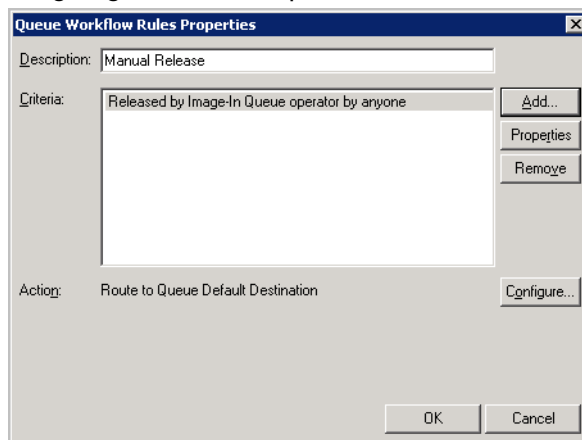


- 5 Click **NEXT**.
- 6 For **The job** option, select **IS** and for the **Released By** option verify **ANYONE** is selected.
- 7 Click **FINISH** to close the **Add Workflow Criteria** page.
- 8 Click **CONFIGURE** to open the **Configure Workflow Action** page.

- 9 In the **Action** area, select **AUTOMATICALLY ROUTE**. Selecting this option will route the documents to the Queue's default destination.



- 10 Click **NEXT** and then click **FINISH**. Configuring the rule is complete.
- 11 Click **OK** to close the **Queue Workflow Rules Properties** page.
- Configuring the rule is complete.



- 12 Click **OK** to go back to the Queue properties page.

Configuring routing of documents from Image-In Queue to ObjectArchive

This section includes:

[Designating default destination as ObjectArchive](#) (6-8)

[Creating Queue workflow rule where documents are routed to default destination:](#) (6-8)

[Creating the AccuRoute Connector for DMS ObjectArchive](#) (6-9)

In this release, to route documents (for example invoices) from Image-In Queue to ObjectArchive set up Queue Workflow rules where the destination for the queue is ObjectArchive.

If the Image-In Queue operator tries to right click and save a document to a DMS where the DMS is ObjectArchive, the operator will get the following error:

```
Failed to initialize DMS provider. (0x80040154) Class not registered
```

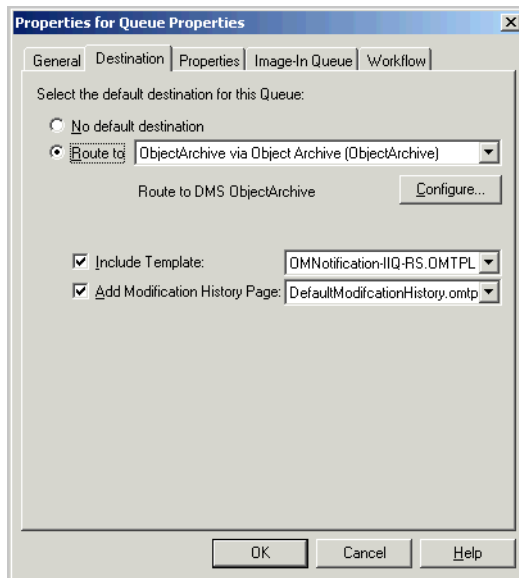
Designating default destination as ObjectArchive

To designate the default destination of your queue as ObjectArchive:

- 1 Click **DESTINATION** to open the Destination page.
- 2 Select **ROUTE TO** option and from the drop down list, select ObjectArchive via ObjectArchive (ObjectArchive).

The AccuRoute connector for DMS for ObjectArchive must be configured before the ObjectArchive option will show in your list. For configuration instructions, see [Creating the AccuRoute Connector for DMS ObjectArchive](#) (6-9).

- 3 Click **CONFIGURE** and configure as necessary.
- 4 Leave the **FORM** drop down empty. Click **OK** to close the page. Note that this will only show up is configuring routing to ObjectArchive.



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

Creating Queue workflow rule where documents are routed to default destination:

For instructions, see [Creating Queue Workflow rules](#) (6-6).

Creating the AccuRoute Connector for DMS ObjectArchive

To create the AccuRoute Connector for DMS ObjectArchive:

- 1 Click **START > ALL PROGRAMS > OMT00L > OMT00L SERVER ADMINISTRATOR**.
- 2 In the console tree, expand the AccuRoute Server.
- 3 Right click **CONNECTORS** and select **NEW ACCUR0UTE CONNECTOR FOR > DMS**. The **License** page opens.
- 4 In the **LICENSE** text box, enter a valid license key.
- 5 Click **NEXT**. The **Server Address** page opens.
- 6 Click **NEXT**. The **Display Name** page opens.
- 7 In the **NEXT** text box, enter **OBJECT ARCHIVE**.
- 8 Click **NEXT**. The **DMS Type** page opens.
- 9 Select **T2 - OBJECTARCHIVE** from the drop down list.
- 10 Click **NEXT**. The **ObjectArchiveServer** page opens showing the predefined Volume Lists.
- 11 Select the Volume List where the documents will be stored.
- 12 Click **FINISH**.

DMS configuration is now complete and the AccuRoute Connector for DMS ObjectArchive is now listed in the Connectors details pane. Users can now use this connector to route documents for archiving.

Configuring Groups

This section includes:

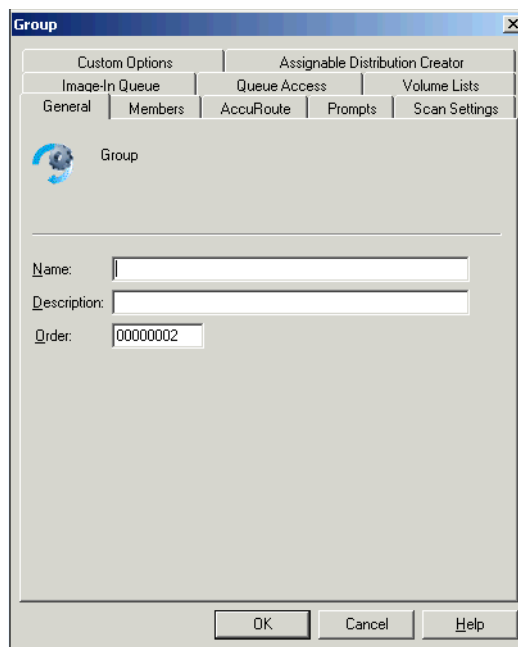
- [Creating a Group](#)
- [Configuring Queue Access](#)
- [Adding Image-In Queue permissions to a Group](#)
- [Configuring access to Volume Lists](#)

Creating a Group

The group Default is created automatically when you install AccuRoute v3.01. Members of this group include all users within the Domain Users group in Active Directory. Use the instructions below to create your desired group with access to Queues you have created.

To create a Group:

- 1 Click **START > ALL PROGRAMS > OMT00L > OMT00L SERVER ADMINISTRATOR**.
- 2 In the console tree, expand the AccuRoute Server.
- 3 Right click **CONFIGURATION** and select **GROUPS** from the drop down menu.
- 4 In the details pane, right click and select **NEW > GROUP** from the drop down options.

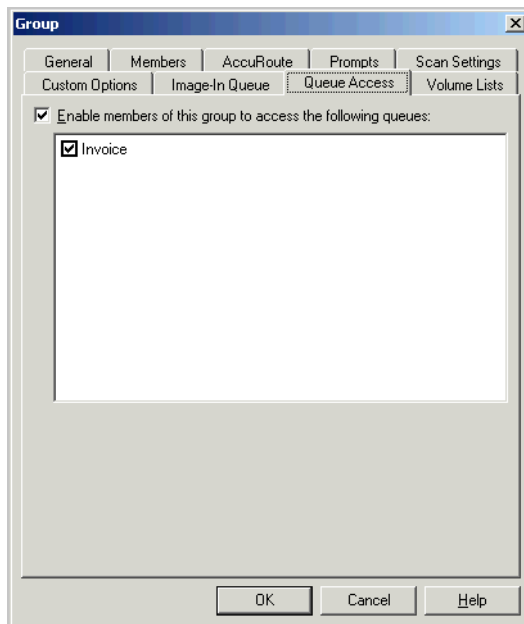


- 5 In the **NAME** text box, enter a name for the group.
- 6 In the **DESCRIPTION** text box, enter a brief description of the group.
- 7 Click **OK**. The group is created and listed in the details pane.

Configuring Queue Access

To give the Queue Access to Volume Lists:

- 1 Click **START > ALL PROGRAMS > OMTOL > OMTOL SERVER ADMINISTRATOR**.
- 2 In the console tree, expand the AccuRoute Server.
- 3 Right click **CONFIGURATION** and select **GROUPS** from the drop down menu.
- 4 Double click your desired Group to open the **PROPERTIES** page.
- 5 Click the **QUEUE ACCESS** tab to open the Queue Access properties.
- 6 Check the box beside the **ENABLE MEMBERS OF THIS GROUP TO ACCESS THE FOLLOWING QUEUES** option.
- 7 Select the Queue **Invoice** from the list displayed.



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

Adding Image-In Queue permissions to a Group

Add the Image-In Queue permission to the desired Group following the instructions below.

To configure a Group:

- 1 Click **START > ALL PROGRAMS > OMT OOL > OMT OOL SERVER ADMINISTRATOR**.
- 2 In the console tree, expand the AccuRoute Server.
- 3 Right click **CONFIGURATION** and select **GROUPS** from the drop down menu.
- 4 Double click your desired Group to open the **PROPERTIES** page.
- 5 Click the **IMAGE-IN QUEUE** tab to open the Image-In Queue properties.
- 6 Check the box beside **ENABLE MEMBERS OF THIS GROUP AS AN IMAGE-IN QUEUE OPERATORS** option.
- 7 Next, select the permissions for this group. All permissions except **ALLOW DOCUMENTS TO BE SPLIT** and **ALLOW WORKFLOW LOCKS TO BE MANUALLY RELEASE** are selected by default.

Note When an user logs into Image-In Queue as a member of a group, the user has all the permissions you select in this step.

The table below lists all permissions and a brief explanation of each of the permissions.

Table 1. List of permissions that can be allowed for an Image-In Queue Group

Permission	Explanation
Allow data to be edited	Will allow editing of required document metadata. For example, if a metadata field requires validation the user can fill in the required value for validation.
Allow document to be annotated	Will allow the Image-In Queue operator to annotate a document. This is useful if the user needs to add text to the document or hide a portion of the text (redact) from the document.
Allow documents to be deleted	Will allow user group to delete processed documents. Documents must be moved into the processed queue first before they can be deleted.
Allow documents to be merged	Will allow Image-In Queue operator to merge multiple documents to create a new document. When you merge multiple documents, the originals automatically move to the processed queue. Merging of documents is useful if a device user failed to scan all pages of a document and the electronic copy has missing pages. In this case, the pages he forgot to scan can be scanned separately and then merged to form the complete electronic document.

Table 1. List of permissions that can be allowed for an Image-In Queue Group

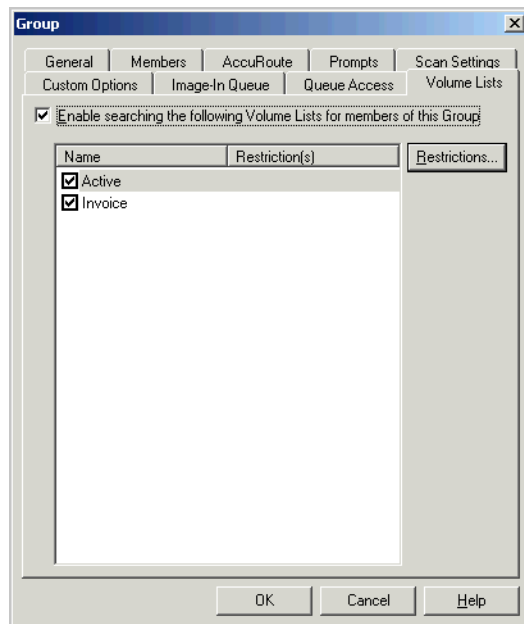
Permission	Explanation
Allow documents to be released	<p>Will allow Image-In Queue operator to release a document. Releasing a document is similar to routing it to a specified default destination, for example ObjectArchive database.</p> <p>A document can be released only after all the required properties have been validated and if the document has a specified destination. Also, documents that are in deficiency cannot be released.</p> <p>However, if the Allow incomplete documents to be released option is checked, a document can be released without validating any required property.</p> <p>If no default destination is specified, the Release option in Image-In Queue client will be disabled.</p>
Allow documents to be routed	Will allow Image-In Queue operator to route a document to an email, fax or printer destinations.
Allow documents to be saved to a DMS	Will allow Image-In Queue operator to route a document to a pre-defined document management system.
Allow documents to be split	Will allow Image-In Queue operator to split a single document into two separate documents. To split a document, multi select the pages that should be in the first document and then right click and select split. The pages you selected becomes the first document and the rest of the pages in the original document combine to become the second document. The original document that you split moves to the processed queue.
Allow documents to be saved locally	Will allow the document to be saved to the local system or to the network.
Allow incomplete documents to be moved to processed	Will allow incomplete documents to move to the processed queue. This is useful in situations where you have documents with invalid scan or where the documents should not be routed to ObjectArchive.
Allow incomplete documents to be released	Will allow incomplete documents to move to the ObjectArchive database.
Allow management of deficiencies	<p>Will allow mapping to and management of deficiency properties.</p> <p>When the Image-In Queue operator assigns a deficiency to a document, he has to provide the email of the user who will address the deficiency. (This user whose email is assigned must be a member of the group the queue is assigned to).</p>
Allow printing of documents	Will allow documents to be printed to a network printer.
Allow workflow locks to be manually released	Will allow the Image-In Queue operator to manually release documents in a workflow.
Operator must view all document pages before completing	Not a valid option.

8 Click **OK** to save your selection.

Configuring access to Volume Lists

To give the group access to Volume Lists:

- 1 Click **START > ALL PROGRAMS > OMTOL > OMTOL SERVER ADMINISTRATOR**.
- 2 In the console tree, expand the AccuRoute Server.
- 3 Right click **CONFIGURATION** and select **GROUPS** from the drop down menu.
- 4 Double click your desired Group to open the **PROPERTIES** page.
- 5 Click the **VOLUME LISTS** tab to open the Volume Lists properties.
- 6 Check the box beside the **ENABLE SEARCHING THE FOLLOWING VOLUME LISTS FOR MEMBERS OF THIS GROUP** option.
- 7 Check the Volume Lists **Active** and **Invoice** from the list displayed.



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

Configuring ObjectArchive

The Accuroute v3.01 server creates a local ObjectArchive database and connects to it by default. This is listed as Active under the ObjectArchive node of the Omtool Server Administrator.

Creating Volume List

To create a new volume list:

- 1 Click **START > ALL PROGRAMS > OMT00L > OMT00L SERVER ADMINISTRATOR**.
- 2 In the console tree, expand the AccuRoute Server.
- 3 Right click **OBJECT ARCHIVE** and select **NEW > VOLUME LIST** from the drop down menu. The **New Volume List** page opens.
- 4 In the **NAME** text box, enter the name **INVOICE**.
- 5 In the **FOLDER** text box, the path to the list is listed as by default. If you want to change the default path, make the necessary change.

Note By default 4 GB is allocated for ObjectArchive Volumes. If the space is less than 4 GB, messages will fail. You can manually configure the value to be greater, equal or less than 4GB.

- 6 Next, click **INDEXING** tab to open the **Indexing** page.
- 7 In the **Properties to Index** section, click **NEW** to open the **Index Properties** page.
- 8 Select from the **PROPERTY** drop box the message properties for indexing.
- 9 Click **OK** to close the **Index Properties** page.
- 10 Click **OK** to close the **New Volume List** page.

Updating the Active Volume List

The **Active** Volume List is created when you install AccuRoute v3.01. After you have added the properties to index in the Volume List you created in [Creating Volume List](#) (6-15), you must update the Active Volume List with the same properties to index.

To update the Active Volume List

- 1 Double click **ACTIVE** and to open the properties page.
- 2 Click **INDEXING** tab to open the **Indexing** page.
- 3 In the **Properties to Index** section, click **NEW** to open the **Index Properties** page.
- 4 Select from the **PROPERTY** drop box the same message properties that you chose for Invoice.
- 5 Click **OK** to close the **Index Properties** page.

- 6 Click **OK** to close the **Active** page.

Optional configurations

The instructions in this section pertain to Image-In Queue customizations. These configurations are not required.

Configuring Folder grouping

Folder Groupings make Image-In Queue group the items into folders that match a certain property. For example a company could group their documents by each items clientID. In this case instead of all New Items being under New Items\Unassigned, the items could potentially be grouped like this

New Items

77884

44342

11222

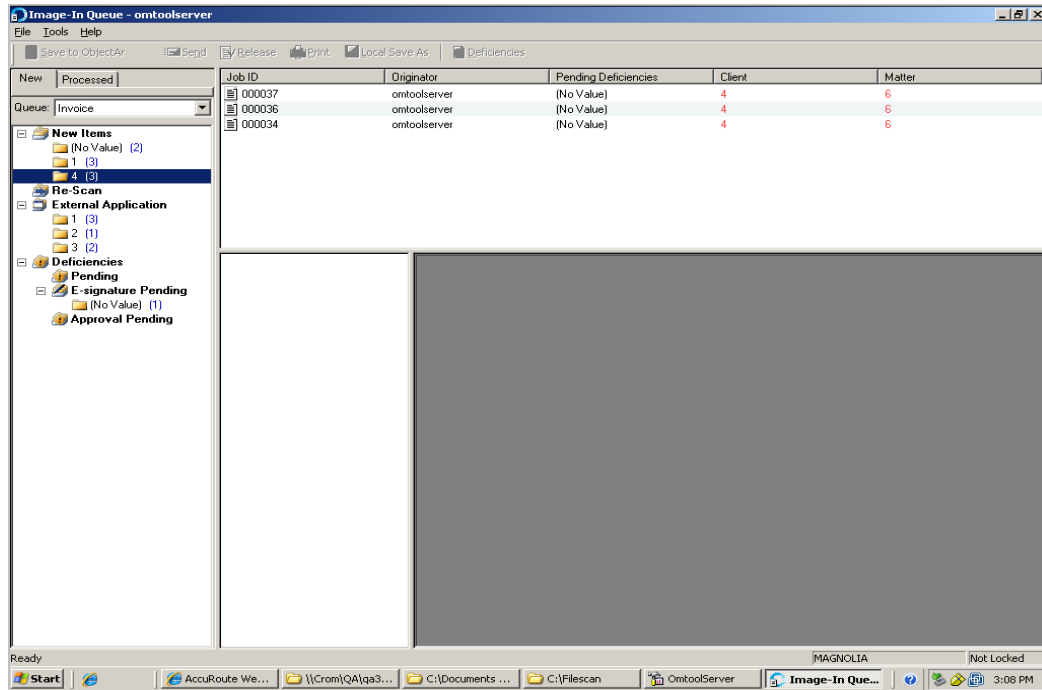
Where 77884 through 11222 are clientIDs.

Now all items that have a clientID of 77884 are displayed in the details pane on the right item when the 77884 folder is clicked.

To create folder grouping:

- 1 Click **START > ALL PROGRAMS > OMTTOOL > OMTTOOL SERVER ADMINISTRATOR**.
- 2 In the console tree, expand the Omttool Server.
- 3 Click **QUEUES**. All defined queues are listed in the details pane.
- 4 Double click the queues to open the **Properties** page.
- 5 Click the **Image-In Queue** tab.
- 6 In the **Folder Grouping** section, click **ADD**. The **Select Property Dictionary Field** page opens.
- 7 Select property items which should make up the new folder. You can select more than one property item.

All messages are now sorted according to the property you selected. For example, in the figure below, the all messages are sorted by the client value. Messages with same client values are grouped into the same folder.



Customizing Folder name

To customize the folder name:

- 1 Click **START > ALL PROGRAMS > OMTOL > OMTOL SERVER ADMINISTRATOR**.
- 2 In the console tree, expand the Omtool Server.
- 3 Click **QUEUES**. All defined queues are listed in the details pane.
- 4 Double click the queues to open the **Properties** page.
- 5 Click the **Image-In-Queue** tab.
- 6 In the **Folder Display Names** for this queue section, select the **Folder state** to customize.
- 7 Click the Folder name and click **CHANGE**. The folder name change page opens.
- 8 In the **DISPLAY NAME** text box, enter the new name.
- 9 Click **OK**.
- 10 Click **OK** to save your changes.

Appendix: Configuring AccuRoute Server for Image-In Queue