AccuRoute® Legal Option Pack installation and configuration guide

For Autonomy iManage WorkSite or Open Text Document Management

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Section 1: Introduction

This guide contains instructions on installing and configuring AccuRoute Legal Option Pack on an AccuRoute v3.01 environment. It is written for the Administrators with knowledge of the Omtool server.

This section includes:

Legal Option Pack (1-1)

Deployment summary (1-2)

Related documentation (1-2)

Legal Option Pack

The AccuRoute Legal Option Pack (also referred to as Legal Option Pack) provides additional capabilities to Omtool's existing DMS integrations. This functionality allows a user in your organization, for example, an administrative user, to create a block of Embedded Directives for a specific user. The administrative user then prints the block of Embedded Directives (called Assignable Distributions) on individual Routing Sheets or as bar codes and delivers them to the specific user they were created for.

When the Omtool DMS Libraries for a DMS application are configured for AccuRoute Desktop, the user who is working on a system with both AccuRoute Desktop and a DMS application client (for example, DeskSite or FileSite for WorkSite) can right-click a document in the document management system and immediately create a new Routing Sheet/barcode or assign an Assignable Distribution. When a message utilizes the Routing Sheet/barcode or Embedded Directive, it is delivered to the named destination in the DMS repository. For information on supported DMS clients, see Supported DMS applications.

Release notes

Enhancements

AccuRoute Legal Option Pack for AccuRoute v3.01 has the following enhancement:

- AccuRoute Legal Option Pack has been qualified for use with AccuRoute v3.01 server and clients. For information on supported DMS clients, see Supported DMS applications.

Limitations

This version has no known limitations.

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Deployment summary

To deploy Legal Option Pack:

1. Verify that the Omtool server and the client meet the requirements. (Go to Section 2: Requirements.)
2. Download the Legal Option Pack update for AccuRoute v3.01 and run it on the AccuRoute Server. (Go to Section 3: Installing update for Legal Option Pack.)
3. Complete the required server configuration. (Go to Section 4: Required server configuration.)
4. Run Legal Option Pack on clients. (Go to Section 5: Installing Legal Option Pack.)
5. Complete required configurations for Legal Option Pack. (Go to Section 6: Required configurations for Legal Option Pack.)
6. Complete any optional configuration. (Go to Section 7: Optional configurations for Legal Option Pack.)
7. Create Assignable Distributions for specific users. (Go to Section 8: Creating Assignable Distributions.)
8. Test using Assignable Distributions within the DMS application. (Go to Section 9: Testing.)

Related documentation

AccuRoute Server documentation

- AccuRoute Serverv3.01 Installation Guide - http://www.omtool.com/documentation/AccuRoute/v3.01/Server/AccuRouteV3.01ServerInstallConfigureGuide.pdf

AccuRoute Desktop documentation

- AccuRoute Desktop Client Installation Guide -http://www.omtool.com/documentation/AccuRoute/v3.01/AccuRouteDesktop/AccuRouteDesktopInstallGuide.pdf

DMS installation and configuration documentation

- Omtool DMS Libraries Installation and Integration Guide for **WorkSite** - http://www.omtool.com/documentation/DMSLibraries/V23/WorkSite/OmtoolDMSLibrariesV23WorkSiteInstallGuide.pdf
- Omtool DMS Libraries Installation and Integration Guide for Livelink ECM - eDOCS DM - http://www.omtool.com/documentation/dmslibraries/v22/DM/OmtoolDMSLibrariesV22DMInstallGuide.pdf

Quick start guides for end users

- For Autonomy DeskSite and FileSite - http://www.omtool.com/documentation/AccuRoute/v3.01/LOP/LOPQuickStartAutonomy.zip
- For DM - http://www.omtool.com/documentation/AccuRoute/v3.01/LOP/LOPQuickStartDM.zip

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Section 2: Requirements

This section includes:

Server requirements (2-1)
Client requirements (2-1)
Additional requirements (2-2)
Supported DMS applications (2-2)
Supported e-mail applications (2-2)

Server requirements

The AccuRoute Server must meet the following requirements:

- ❒ AccuRoute v3.01

  To check the version of the server, start the Omtool Server Administrator. Expand the items in the console tree if necessary. Right-click the server and select **PROPERTIES**. The version must be **v3.01**.

- ❒ Omtool DMS Libraries v3.01, which is included with the AccuRoute v3.01 installation kit.

- ❒ A supported DMS application, installed on the Omtool server. This application must not be integrated with Microsoft Word. See Supported DMS applications.

Client requirements

The client must meet the following requirements:

- ❒ AccuRoute Desktop Client v3.01 running on Windows® XP SP3

- ❒ Supported DMS client - see Supported DMS applications for more information.

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- ❒ Supported email application - this must be installed and selected as the Windows default email application. See Supported e-mail applications (2-2) for more information.

Important You will need to download AccuRoute Legal Option Pack Update from the Omtool Website and run it on the AccuRoute Server. This will install the LOP client directory. The executables within the LOP client directory should not be run on the AccuRoute Server.
If you do run the LOP on the AccuRoute Server and then uninstall, the process will overwrite and remove files needed by the server. Consequently, the server will not function properly.

Additional requirements

- ❒ Access to Program Files - This is required only for users who create Assignable Distributions using Assignable Distributions Creator.
- ❒ Microsoft Word 2003/2007 - This is required only for users who create Routing Sheets with Mail Merge.

Supported DMS applications

The following DMS applications are supported:

- Autonomy iManage WorkSite v8.2, v8.3, v8.5
- Autonomy iManage DeskSite 8.2, v8.5
- Autonomy iManage FileSite 8.2, v8.5
- Open Text Document Management (formerly Livelink ECM] eDOCS. DM and Hummingbird DM) - eDOCS DM v 6.0+

Important Currently, LOP for DM is not supported on 64 bit systems. Check back to see when this feature will be available in the future.

Consult the installation and integration guide for your DMS application for more information. For a list of all related documentation, go to AccuRoute v3.01 documentation page.

Supported e-mail applications

Assignable Distributions Creator supports the following e-mail applications:

- Outlook 2007/2003 (Outlook Express is not supported.)
- Notes 7.x/6.x/5.x

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- GroupWise 6.0/5.5

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Section 3: Installing update for Legal Option Pack

This section includes:

Downloading Legal Option Pack for AccuRoute v3.01 update (3-1)
Installing Legal Option Pack for AccuRoute v3.01 update (3-1)

Downloading Legal Option Pack for AccuRoute v3.01 update

This update is available for download for a separate fee. For more information, contact Omtool Sales.

To download Legal Option Pack for AccuRoute v3.01update:

1. Go to http://www.omtool.com/support.
2. Log in using your customer number.
3. Locate the module in the **DOWNLOADS & DOCS** section.
4. Download the module and save it to a local drive.

Installing Legal Option Pack for AccuRoute v3.01 update

To install Legal Option Pack for AccuRoute v3.01 update:

1. Log on to the server using an account that belongs to the Administrators group.
2. Quit all instances of the Omtool Server Administrator and disconnect all Terminal Server sessions.

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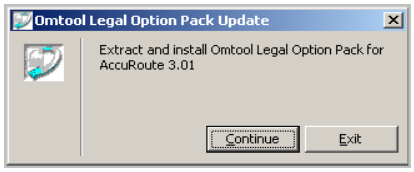
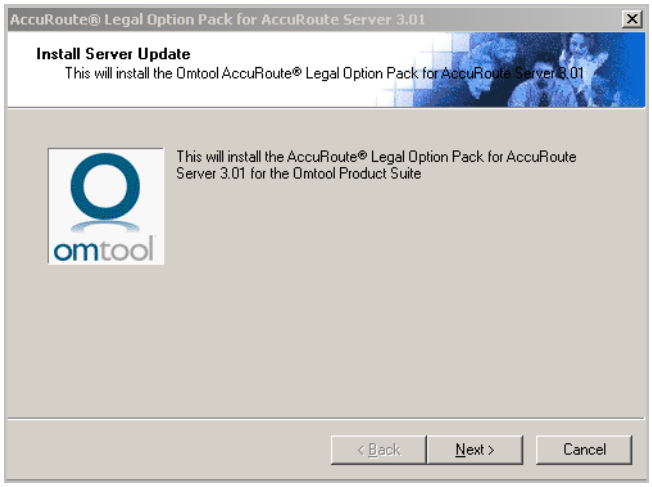
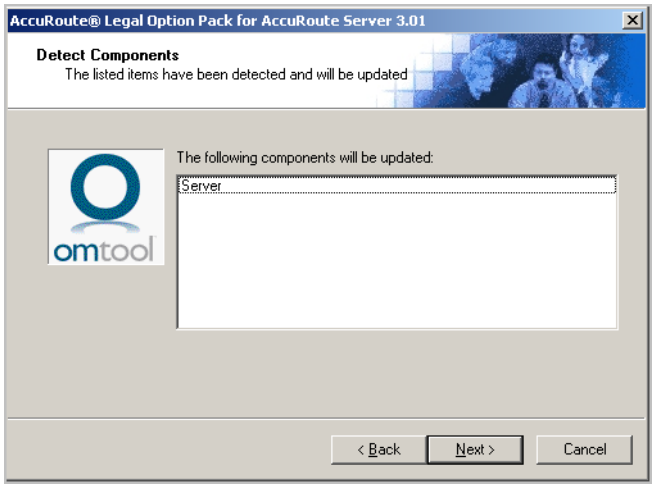
3 Go to the folder where you saved the download and run `omARS301LegalOptionPack.exe`. The Omtool Legal Option Pack Update readme opens prompting you to extract and install Omtool Legal Option Pack for AccuRoute v3.01.



4 Click **CONTINUE**. The setup extracts the update files.



5 Click **NEXT**. The **Detect Components** page shows the list of the components that will be updated.



6 Click **NEXT**. The setup copies files to the server and displays a message indicating that the update is complete.

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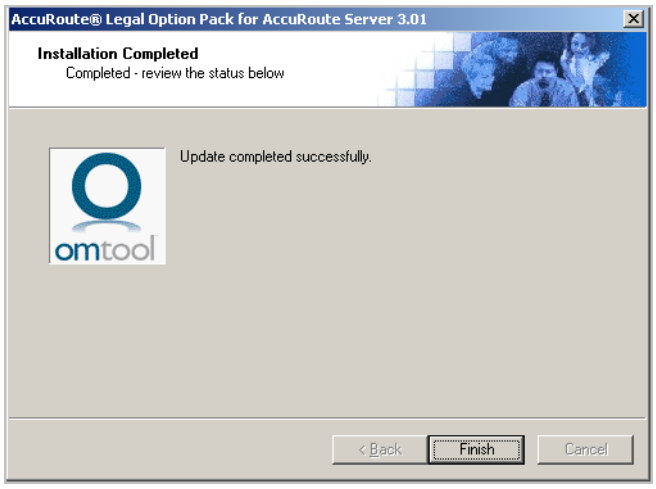
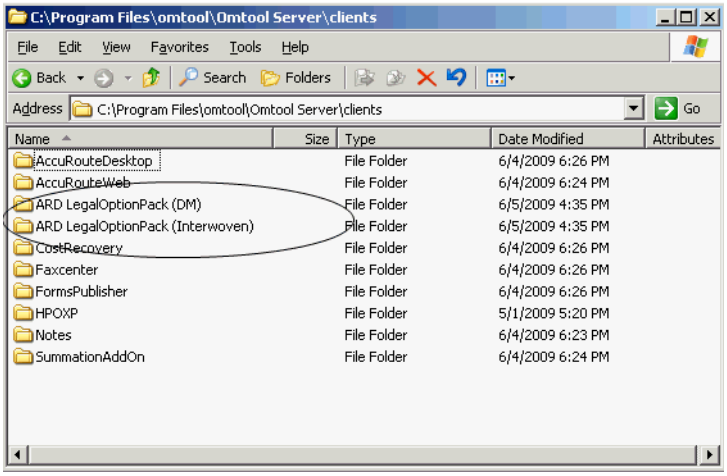


7 Click **FINISH**.

The update installs Legal Option Pack for DM and for Autonomy.



These folders contain the setup files for AccuRoute Legal Option Pack.

- The AccuRoute Legal Option Pack for Open Text Document Management contains the setup files for Livelink ECM - eDOCS DM.
- The AccuRoute Legal Option Pack for Autonomy iManage WorkSite contains the setup files for WorkSite.

Depending on which DMS you are using, you have to make accessible the appropriate set up files to the systems running the AccuRoute Desktop client. For example, if you are using DM, you will need to give access to the setup files for Legal Option Pack for DM. For more information, go to Installing Legal Option Pack (5-1)

8 Continue to Required server configuration (4-1).

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Section 4: Required server configuration

This section includes:

Setting Group permissions (4-1)
Configuring auto population of billing information in AccuRoute Desktop (optional) (4-3)

Setting Group permissions

The person creating Assignable Distributions must have the permissions to:

- Use AccuRoute Desktop - this requirement is met by enabling a Group to use the AccuRoute Desktop client.
- Create Assignable Distributions for other users - this requirement is met by configuring the Assignable Distributions Creator tab.

To enable permissions to use AccuRoute Desktop:

1. Start **Omtool Server Administrator**.
2. Expand the console. Expand **CONFIGURATION** and go to **GROUPS**.
3. Double click the Group that will create the Assignable Distributions and open the Group Properties page

Note The Group Default is created when AccuRoute Server is installed.

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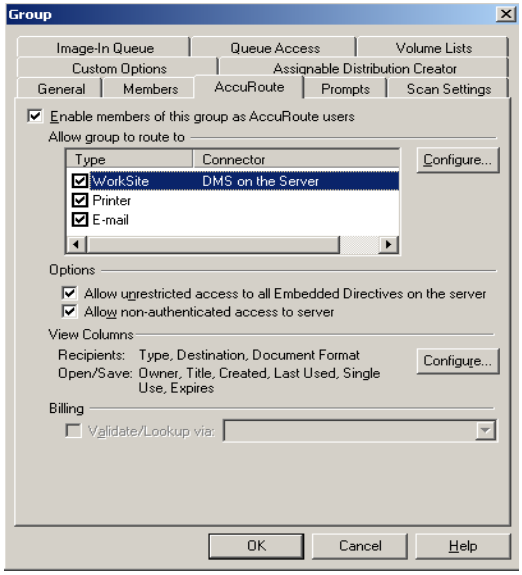
4 Click **ACCUROUTE** to open the AccuRoute tab.

5 Check the box beside **ENABLE MEMBERS OF THIS GROUP AS ACCUROUTE USERS**.

6 In the Allow group to route to section, check the box beside **WORKSITE**.



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

To enable a Group with permissions to create Assignable Distributions for other users:

1 Start **Omtool Server Administrator**.

2 Expand the console. Expand **CONFIGURATION** and go to **GROUPS**.

3 Double click the Group that will create the Assignable Distributions and open the Group Properties page

Note The Group Default is created when AccuRoute Server is installed.

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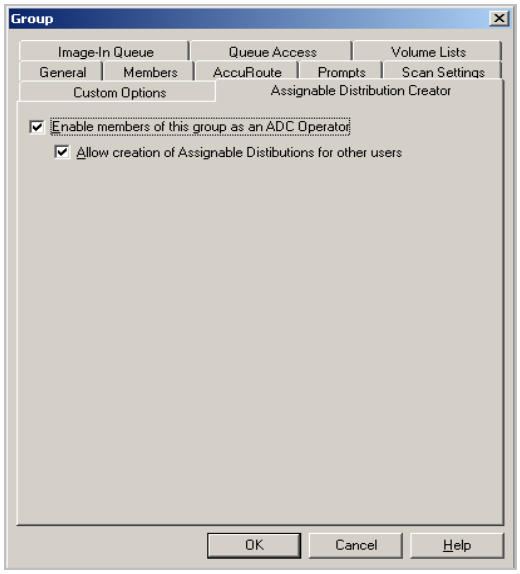
4 Click **ASSIGNABLE DISTRIBUTION CREATOR** to open the ADC tab.



5 Check the box beside **ENABLE MEMBERS OF THIS GROUP AS AN ADC OPERATOR**.

Note This will allow them to use Assignable Distribution Creator and create Assignable Distributions for user's won use. This option will not allow the user to create Assignable Distributions for others.

6 If you want the members of this group to create Assignable Distributions for others, also check the box beside **ALLOW CREATION OF ASSIGNABLE DISTRIBUTIONS FOR OTHER USERS**.

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

Configuring auto population of billing information in AccuRoute Desktop (optional)

You can optionally, configure billing for AccuRoute users so that they have the ability to auto populate AccuRoute Desktop's billing fields when right clicking from supported DMS clients.

For information on how to right click and send documents to AccuRoute Desktop where billing fields are auto populated with information from the DMS repository, see Auto populating billing fields in AccuRoute Desktop (9-4)

This section includes:

Enabling billing component (4-4)

Enabling billing for AccuRoute Connector for DMS (4-4)

Configuring billing for AccuRoute user Group (4-5)

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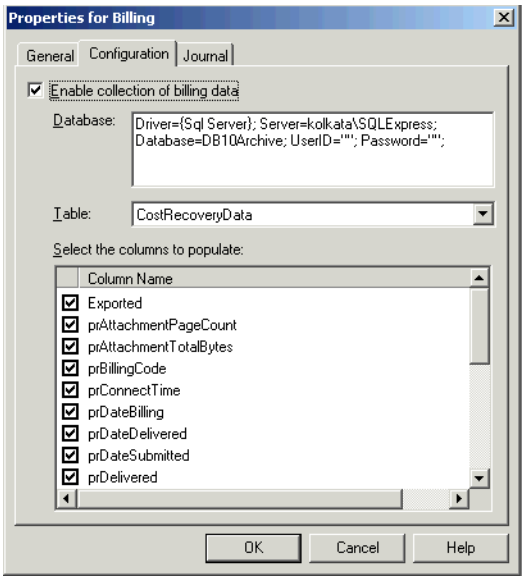
Enabling billing component

To enable billing component:

1. Start **Omtool Server Administrator**.
2. In the console tree, expand **Components**. The components for your environment are listed in the details pane.
3. Double click the **Billing** component to open the **Properties** page.
4. Click **CONFIGURATION** to open the **Configuration** page.
5. Check the box beside **ENABLE COLLECTION OF BILLING DATA**.



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

Enabling billing for AccuRoute Connector for DMS

To enable billing for AccuRoute Connector for DMS:

1. Start **Omtool Server Administrator**.
2. In the console tree, expand **Connectors**. The connectors licensed for your environment are listed in the details pane.
3. Double click the **AccuRoute Connector for DMS** to open the **Properties** page.
4. Click **ADVANCED** to open the **Advanced** page.

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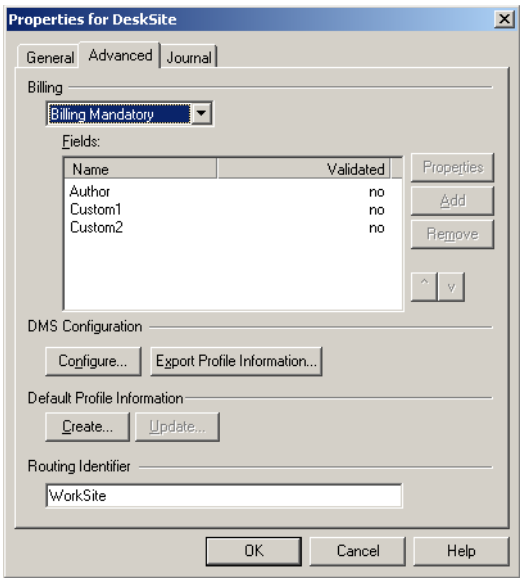
5 From the **BILLING** drop down, select **BILLING MANDATORY / BILLING SELECTABLE**. The billing fields are listed in the **FIELDS** section. In the example below, the billing fields for WorkSite as listed.



6 Verify the **ROUTING IDENTIFIER** is correct (it should be WorkSite for DeskSite or FileSite clients and DM for DM clients).

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

Configuring billing for AccuRoute user Group

To configure billing for AccuRoute users:

1 Start **Omtool Server Administrator**.

2 Expand the console. Expand **CONFIGURATION** and go to **GROUPS**.

3 Double click the Group for whom you are configuring billing to open the Group Properties page

4 Click **ACCUROUTE** to open the AccuRoute page.

5 In the **Billing** section, check the box beside **VALIDATE/LOOKUP VIA** and then from the drop down text box, select the AccuRoute Connector for DMS. (In the example below, the AccuRoute Connector for DMS is DeskSite).

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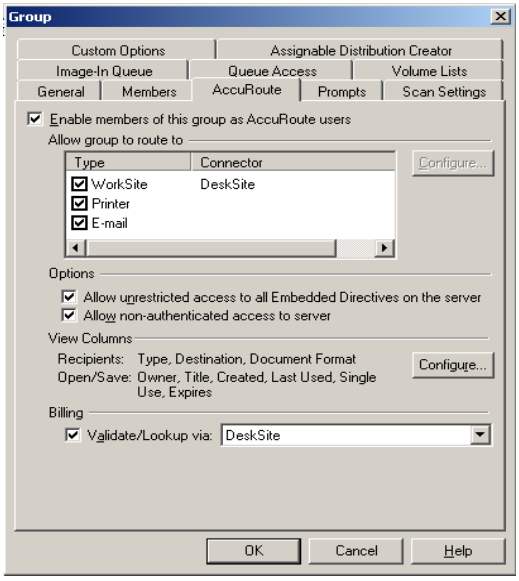

6 Click **OK** to save your changes.

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Section 5: Installing Legal Option Pack

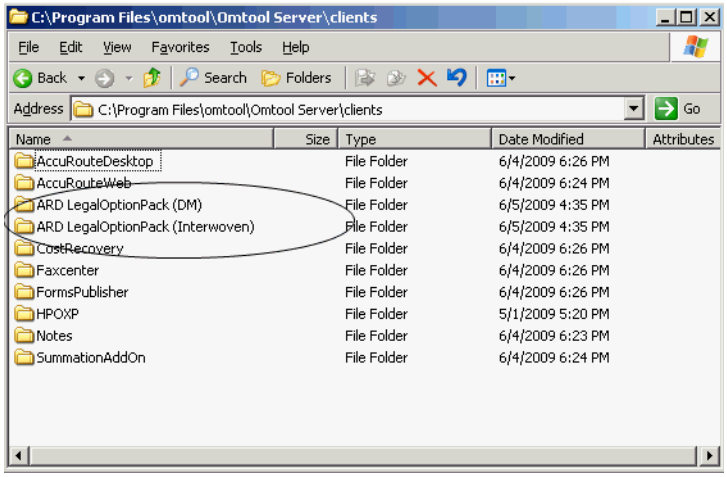
This section includes:

Accessing the Legal Option Pack setup files (5-1)
Installing Legal Option Pack on AccuRoute Desktop workstations (5-2)
Uninstalling AccuRoute Legal Option Pack (5-5)
Installing AccuRoute Legal Option Pack in silent mode (5-5)
Uninstalling AccuRoute Legal Option Pack setup in silent mode (5-6)

Accessing the Legal Option Pack setup files

In order to use the Assignable Distributions Creator or the right-click functionality within your DMS application, you must install Legal Option Pack on the system running the AccuRoute Desktop.

But before you can install Legal Option Pack in the client machine, you must access the setup files. The setup files are located in the **..\\PROGRAM FILES\OMTOOL\OMTOOL SERVER\CLIENTS** directory of the system running the AccuRoute Server.



Depending on the DMS you are using (DM or WorkSite), copy the appropriate setup files to a shared folder in the network drive so that you have access to the setup files from the client system. For example, if you need the setup files for Legal Option Pack for DM, copy the **ARD LegalOptionPack (DM)** folder to a shared network drive.

Alternately, you can also share the folder containing the setup files you need. For example, if you need the setup files for Legal Option Pack for DM, you can share the **ARD LegalOptionPack (DM)** folder in the **..\\PROGRAM FILES\OMTOOL\OMTOOL SERVER\CLIENTS** directory of the system running the AccuRoute Server.

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Installing Legal Option Pack on AccuRoute Desktop workstations

The Legal Option Pack application is licensed on a per seat basis, and you purchase the number of seats your company requires. It includes the Assignable Distributions Creator and right-click functionality within your DMS application.

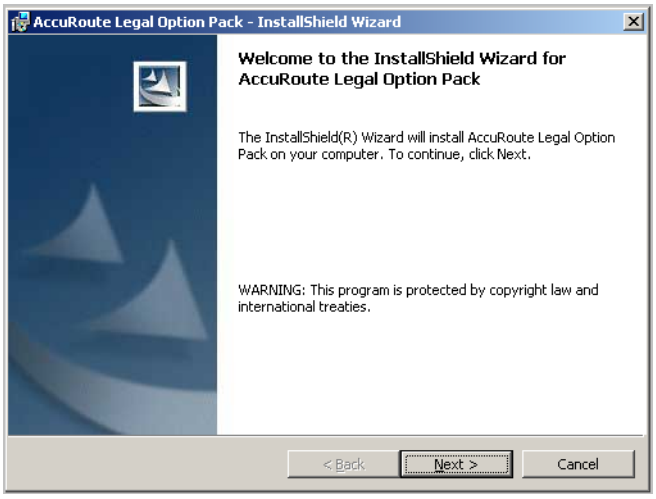
Note Legal Option Pack is a client application only. Do not install this application on the Omtool server.

You can only install the Legal Option Pack on as many workstations as you purchased a license for. For example, if you purchase 50 seats, you can install the update on up to 50 workstations.

To install Legal Option Pack on a client workstation:

1 Log on to the client using an account that belongs to the Administrators group, go to the folder containing the setup files.

2 Click **SETUP.EXE**. The setup configures your system and shows the **Welcome** message.



3 Click **NEXT**. The license agreement page opens.

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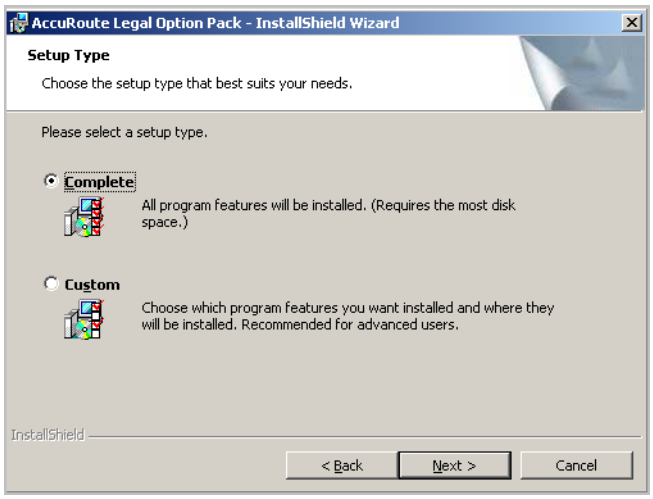
4 Read the license agreement and select **I ACCEPT THE TERMS IN THE LICENSE AGREEMENT** option.

5 Click **NEXT**. The **Setup Type** page opens.

6 Select from **Complete** (the default) or **Custom**.



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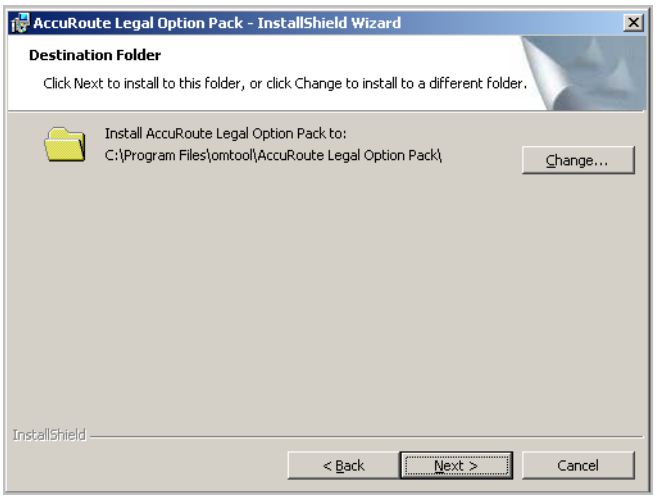
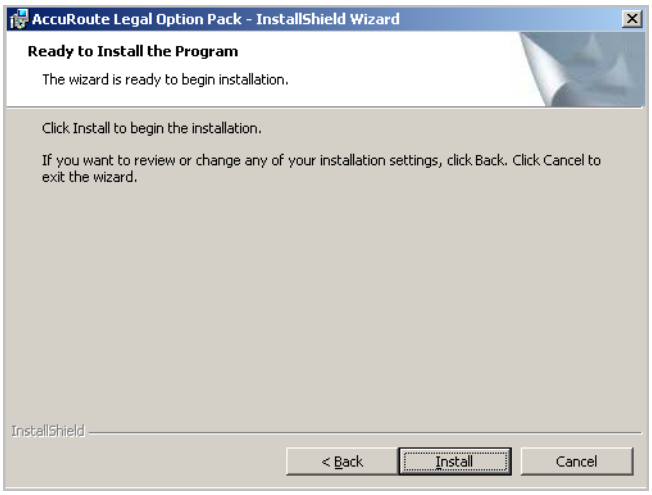
7 Click **NEXT**. The **Destination Folder** opens.



Note The default destination is **C:\PROGRAM FILES\OMTOOL\ACCUROUTE LEGAL OPTION PACK**.

To change the default destination, click **CHANGE** and browse to your preferred destination folder.

8 Click **NEXT**. The **Ready to Install the Program** page opens.



9 Click **INSTALL** to begin the installation. When installation is complete, the **Installation Completed** page opens.

10 Click **FINISH** to close the InstallShield Wizard.

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Uninstalling AccuRoute Legal Option Pack

To uninstall AccuRoute Desktop:

1. Click **START > CONTROL PANEL > ADD/REMOVE PROGRAMS**.
2. Select **ACCUROUTE LEGAL OPTION PACK** and click **REMOVE**.
3. Follow the prompts to remove the application.

To verify that AccuRoute Legal Option Pack is removed from the client, browse the directory structure on the client and verify that **…\OMTOOL\ACCUROUTE LEGAL OPTION PACK** has been removed. (The Omtool directory remains if other Omtool applications are installed on the client.)

Installing AccuRoute Legal Option Pack in silent mode

To install the AccuRoute Legal Option Pack in silent mode:

1. Log on to the client with an account that belongs to the local Administrators group.
2. Copy the AccuRoute Legal Option Pack setup directory to a local drive, or map a drive to the folder that contains the setup files.
3. Open a command prompt.
4. Set the current directory to the Legal Option Pack setup directory.
5. Run: `setup.exe /s /v"/qn ALLUSERS=1"`

   This installs Legal Option Pack to the default location, C:\Program Files\Omtool\AccuRoute Legal Option Pack. 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, **J:\PROGRA~1\OMTOOL\ACCURO~1**.

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`.

The ALLUSERS property is set to true, which results in Start menu shortcuts for AccuRoute Legal Option Pack being copied to C:\Documents and Settings\All Users\Start Menu\Programs\Omtool and becoming available to all local users. If AccuRoute Legal Option Pack should be available to some local users but not others, set ALLUSERS to 0, and then manually copy the Start menu shortcut from C:\Documents and Settings\[current Windows user alias]\Start Menu\Programs\Omtool to the corresponding directory for the appropriate users.

To verify that AccuRoute Legal Option Pack is installed on the client, go to **…\OMTOOL\ACCUROUTE LEGAL OPTION PACK** on the client and verify that the AccuRoute Legal Option Pack program files are installed.

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Uninstalling AccuRoute Legal Option Pack setup in silent mode

To remove the AccuRoute Legal Option Pack in silent mode:

1. Log on to the client with an account that belongs to the local Administrators group.
2. Copy the AccuRoute Legal Option Pack setup directory to a local drive, or map a drive to the folder that contains the setup program. (The setup program is required to remove the application silently.)
3. Open a command prompt.
4. Set the current directory to the AccuRoute Legal Option Pack setup directory.
5. Run: `setup.exe /s /v"/qn ALLUSERS=1"`

   This removes AccuRoute Legal Option Pack from the default location, **C:\PROGRAM FILES\OMTOOL\ACCUROUTE LEGAL OPTION PACK**. 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, J:\PROGRA~1\OMTOOL\ACCURO~1.

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`.

The ALLUSERS property is set to true, which results in Start menu shortcuts for AccuRoute Legal Option Pack being removed from C:\Documents and Settings\All Users\Start Menu\Programs\Omtool for all local users.

To verify that AccuRoute Legal Option Pack is removed from the client, browse the directory structure on the client and verify that **…\OMTOOL\ACCUROUTE LEGAL OPTION PACK** has been removed. (The Omtool directory remains if other Omtool applications are installed on the client.)

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Section 6: Required configurations for Legal Option Pack

This section includes:

Editing the config.xml file (6-1)

Creating exceptions in the Windows firewall configuration (Windows XP SP2 or later) (6-2)

Editing the config.xml file

Legal Option Pack uses email authentication while creating the sequential block of Assignable Distributions. Therefore, it needs to know which e-mail program your company is using.

When you install Assignable Distributions Creator, a config.XML file is created in the **OMTOOL\ACCUROUTE LEGAL OPTION PACK** directory. You must edit this file to set the correct email value for your company. The default value is Outlook. Supported values are:

- Outlook
- LotusNotes
- Groupwise

To configure the email value in the configuration file:

1. Login to the system where you installed Legal Option Pack.
2. Navigate to **C:\PROGRAM FILES\OMTOOL\ACCUROUTE LEGAL OPTION PACK** folder and open config.xml for editing.
3. Go to the `<emailintegration>` node.
4. Set the value as needed. The options are Outlook (default), LotusNotes and Groupwise. For example:

   ```
   <emailintegration>Outlook</emailintegration>
   ```
5. Save your changes.

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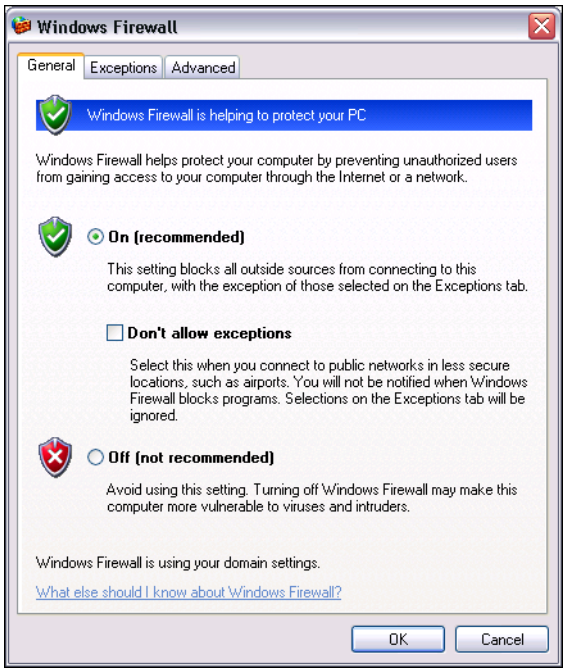
Creating exceptions in the Windows firewall configuration (Windows XP SP2 or later)

For clients running Windows XP SP2 or later with Windows Firewall enabled, two exceptions must be added to the Windows firewall configuration:

- AccuRouteDesktop.exe
- ADCreator.exe

To create exceptions in the Windows firewall configuration:

1 Go to Control Panel and start Windows Firewall.



2 Verify that **On** is selected. (If **Off** is selected, it is not necessary to complete this procedure.)

3 Verify that **Don't allow exceptions** is not selected. (Clear the option if necessary to allow exceptions.)

4 Go to the **Exceptions** tab and click **ADD PROGRAM**.

5 Click **BROWSE**, go to **AccuRouteDesktop.exe**, select it, and click **OPEN**.

6 Click **BROWSE**, go to **ADCreator.exe**, select it, and click **OPEN**.

7 Click **OK** to close the **Add a Program** dialog box.

8 Click **OK** to close Windows Firewall.

For more information on adding exceptions to the Windows firewall, consult Windows help.

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Section 7: Optional configurations for Legal Option Pack

This section includes:

Rolling out Assignable Distributions Creator (7-1)

Creating properties (EMB) files (7-2)

Creating a mail merge template (7-6)

Configuring the view (7-6)

Configuring the default setting on the display window (7-9)

Rolling out Assignable Distributions Creator

While you are required to install Legal Option Pack on each workstation that needs this functionality, you can pre-configure Assignable Distributions Creator to simplify your rollout. Modifying the files as detailed in this section determines how Assignable Distributions Creator behaves. After installing the update on a client workstation, you can then copy these configuration files to that workstation.

The files you can pre-configure are:

- ❒ Property (EMB) files. For configuration instructions, see Creating properties (EMB) files (7-2)

  Copy pre-configured EMB files to **...\OMTOOL\ACCUROUTE LEGAL OPTION PACK\PROPERTIES** on the client workstations or to a shared network location.

- ❒ Mail Merge templates. For configuration instructions, see Creating a mail merge template (7-6)

  Copy the Mail Merge template (RoutingSheetMailMerge.doc) to **...\OMTOOL\ACCUROUTE LEGAL OPTION PACK\OUTPUT** on the client workstations.

- ❒ Configuration.XML. For configuration instructions, see Configuring the view (7-6)

  Copy the pre-configured configuration.XML file to **...\OMTOOL\ACCUROUTE LEGAL OPTION PACK\INTERWOVEN RIGHTCLICK** on the client workstations.

- ❒ Config.XML. For configuration instructions, see Editing the config.xml file (6-1).

  Copy the pre-configured config.XML file to **...\OMTOOL\ACCUROUTE LEGAL OPTION PACK**on the client workstations.

- ❒ View file. For configuration instructions, see Configuring the default setting on the display window (7-9)

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Copy the pre-configured DMSPrompt.omv file to the **..\OMTOOL\OMTOOLSERVER\ACCUROUTEVIEWS** folder.

Creating properties (EMB) files

EMB files are AccuRoute Desktop template files you can use with AccuRoute Assignable Distributions Creator, and you create these files using AccuRoute Desktop. Each template file stores properties for the Embedded Directives. For example, properties can include single use or multi-use, expiration date, retain Routing Sheet in delivery document, and more.

After you crate an EMB file, save the file to **\OMTOOL\ACCUROUTE LEGAL OPTION PACK\PROPERTIES** location. You can, however, copy these files to a central network location so that they are available to all users.

The default property files Labels Default.EMB and Routing Sheet Default.EMB are installed with the Assignable Distributions Creator. To customize these properties, simply create and save additional properties files to **\OMTOOL\LEGAL OPTION PACK\PROPERTIES** location. You can define as many EMB files as you need.

Note If you use any sender variables in the template, those variables are removed when you create the Assignable Distributions.

Property file requirements

Property files have the following requirements:

1. You must add an e-mail destination, and the e-mail address must be `unassigned@noaddress.none`.
2. You can add additional recipients to the property file. These additional recipients are retained in the Assignable Distribution when it is used.

Creating a property (EMB) file

Using the following procedure, you will create and save a property file.

To create a property (EMB) file:

1. Start AccuRoute Desktop. For more information on AccuRoute Desktop, consult the AccuRoute Desktop user guide.

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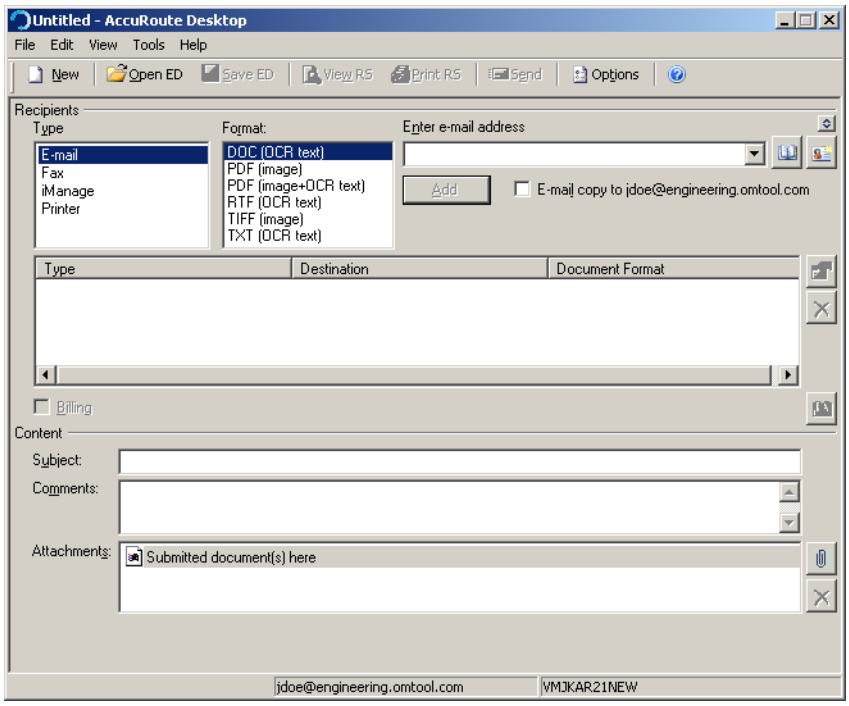
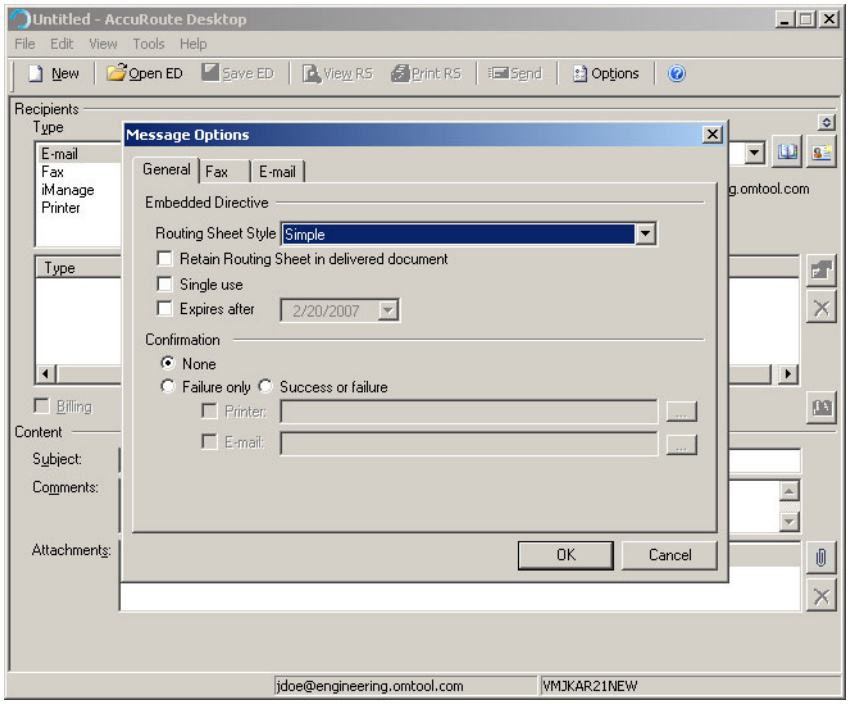


2 Click **OPTIONS**, select the desired options, and click **OK**.



3 Select **E-MAIL** as the recipient type and enter the following e-mail address: `unassigned@noaddress.none`.

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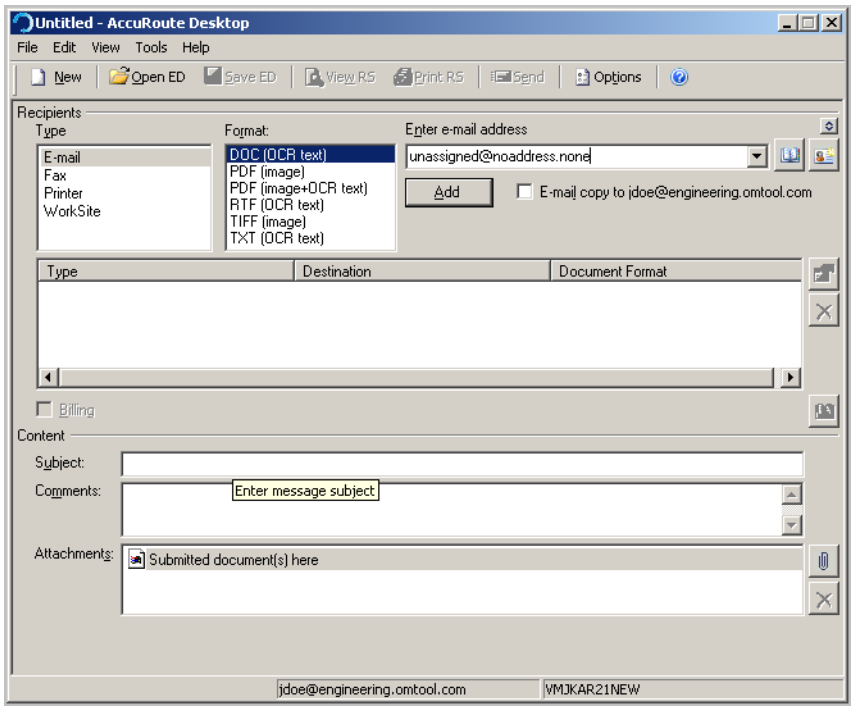
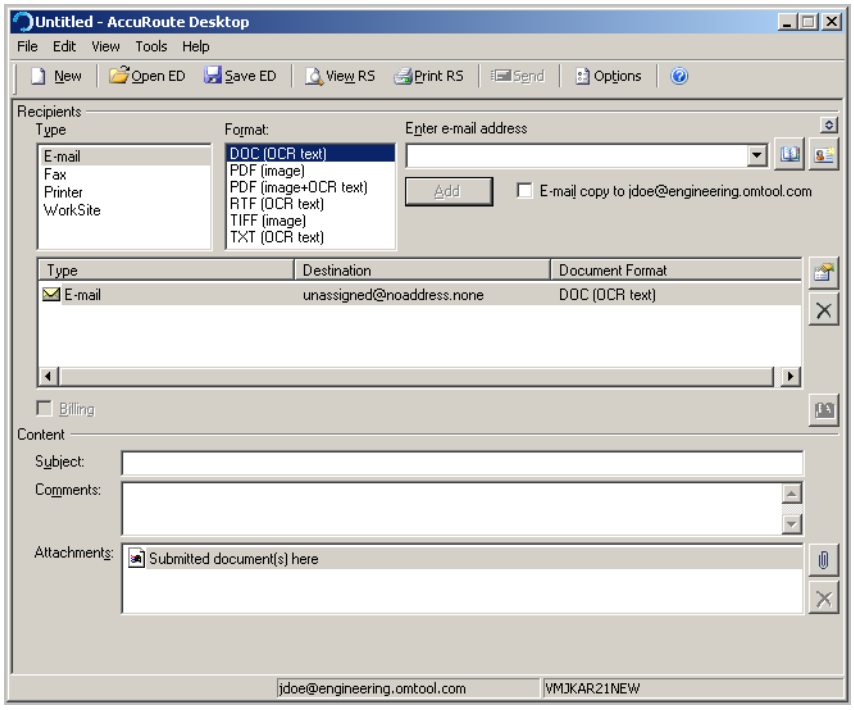


4 Click **ADD**.



5 Add additional recipients if desired (optional).

6 From the **FILE** menu, select **TEMPLATES** and then select **SAVE AS NEW**.

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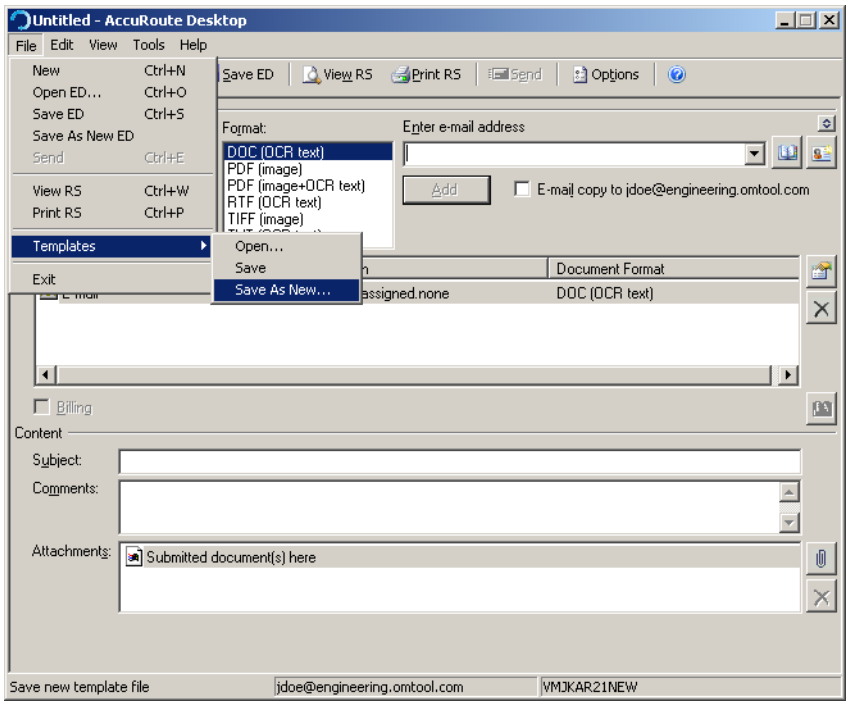
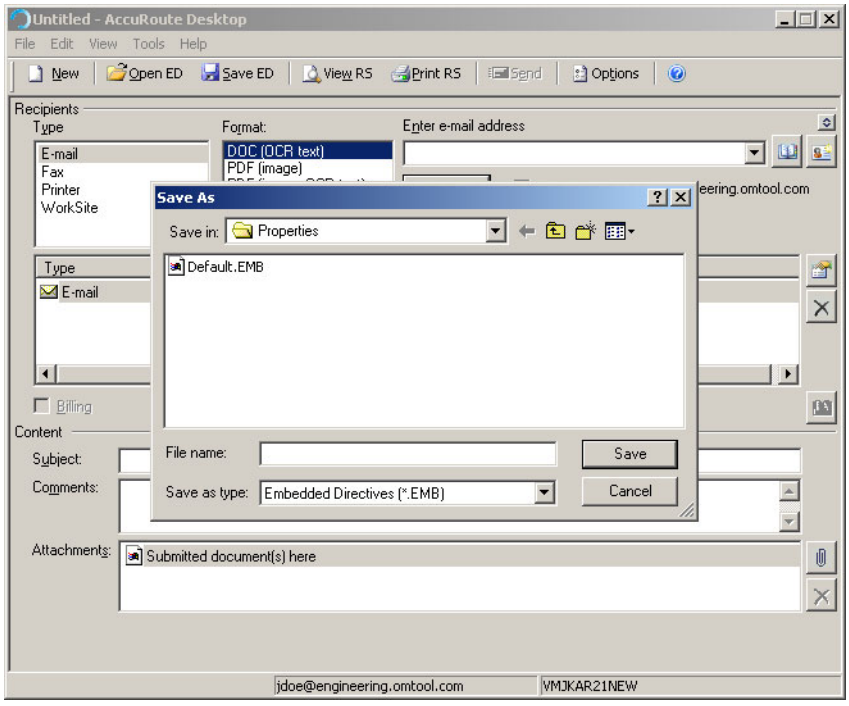


7 Specify a unique name for the template and click **SAVE**. Go to the **...\OMTOOL\ACCUROUTE LEGAL OPTION PACK\PROPERTIES** folder and save the template file.



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Creating a mail merge template

After the administrator creates Assignable Distributions, the output file is created in the **...\OMTOOL\ACCUROUTE LEGAL OPTION PACK\OUTPUT** folder. The administrator user then takes the output file and uses a Mail Merge template to create individual Routing Sheets.

At this time Omtool supports using the Microsoft Word Mail Merge forms with the Assignable Distributions Creator. The following Microsoft Mail Merge templates - RoutingSheetMailMerge.doc and AssignableDistributionBarcode.doc are installed in the **...\OMTOOL\ACCUROUTE LEGAL OPTION PACK\OUTPUT** folder.

If you wish to create your own Mail Merge template, the following fields must be included:

- OMID
- OWNER
- SEQUENCEID

For information on creating a Microsoft Word Mail Merge template, consult Microsoft's documentation.

Configuring the view

AccuRoute Desktop uses view files to configure exactly what functionality is available to your company's users. Assignable Distributions also uses view files to determine what the final choices are for assigning and printing Routing Sheets. The view is controlled by the configuration.XML file, and you can change the view by modifying this file.

There are three different ways to configure using Assignable Distributions. You can select which view your users see by editing the **...\OMTOOL\ACCUROUTEDESKTOP\CONFIGURATION.XML** file. The three choices are:

- Select to either create a new Routing Sheet or to use an existing Assignable Distribution (DMSPrompt.omv)
- A Routing Sheet automatically creates when using right-click functionality within the DMS application (DMSCreateRS.omv)
- Use an existing Assignable Distributions only (DMSAssignDistribution.omv)

The field that drives the display is the CommandLine field. Three valid CommandLine arguments are included in the default configuration.XML file. Two are commented out, leaving the default display using the view file that prompts to user to either **CREATE NEW ROUTING SHEET** or **USE EXISTING ASSIGNABLE DISTRIBUTION**.

To change the display for your users, remove the comment attribute from the CommandLine you wish to use and add the comment attribute to the CommandLine currently in use.

Figure 7-A: **Valid CommandLine arguments in configuration.XML**

As shown here, two CommandLines are commented out with an exclamation <!-- at the beginning of the line, and --> at the end of the line.

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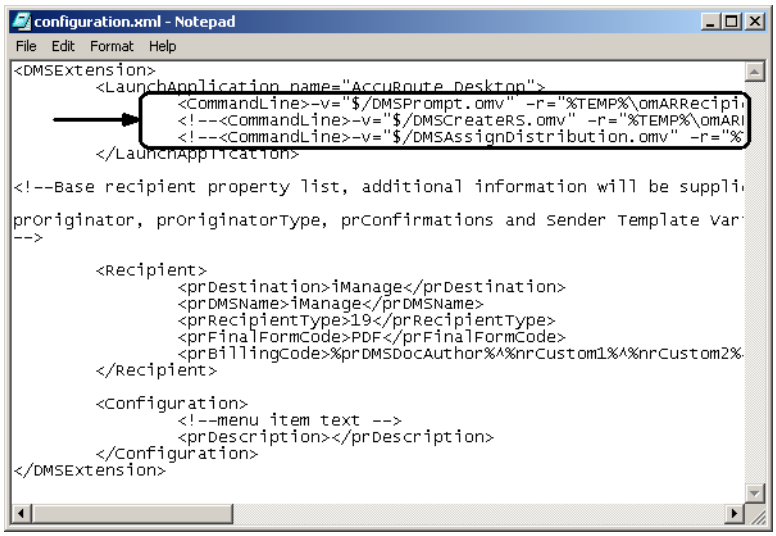


Select to create Routing Sheet only

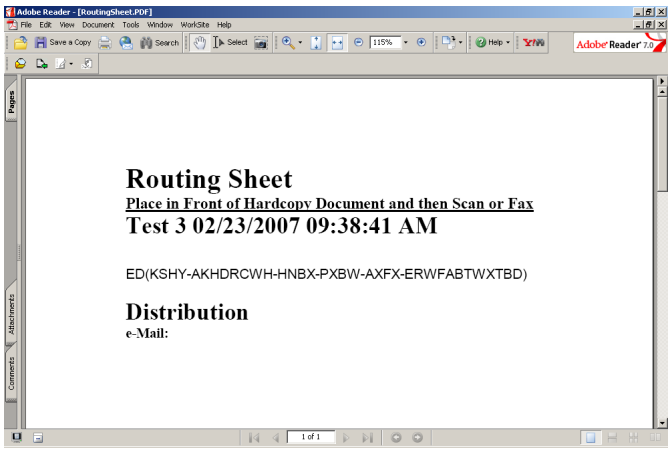
Use the following procedure if you want your users to create a Routing Sheet only.

To create a Routing Sheet only

1 Open the ...\Omtool\AccuRouteDesktop\configuration.XML file with Notepad and remove the comment attribute from the following CommandLine:

```
<CommandLine>-v="$/DMSCreateRS.omv" -r="%TEMP%\omARRecipient.xml" -
t="%prDMSDocName% %DATE% %TIME%" -nodmsenum -cachedemail -
action=prompt</CommandLine>
```

This CommandLine removes the display window completely and display the Routing Sheet immediately.



2 Add the comment attributed to the CommandLine you wish to disable.

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With this CommandLine in effect, after connecting to the server using the right-click functionality in the DMS application, a Routing Sheet is immediately generated and displayed in Adobe Reader.

Select to use Assignable Distributions only

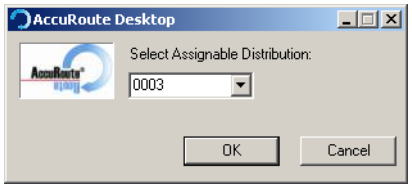
Use the following procedure if you want your users to use Assignable Distributions only.

To use Assignable Distributions only:

1 Open the ...\Omtool\AccuRouteDesktop\configuration.XML file with Notepad and remove the comment attribute from the following CommandLine:

```
<CommandLine>-v="$/DMSAssignDistribution.omv" -
r="%TEMP%\omARRecipient.xml" -t="%prDMSDocName% %DATE% %TIME%" -
nodmsenum -cachedemail -action=assigndistribution</CommandLine>
```

This CommandLine opens a display window that only allows the users to select an existing Assignable Distribution.



2 Add the comment attributed to the CommandLine you wish to disable.

With this CommandLine in effect, after connecting to the server using the right-click functionality in the DMS application, the user will select an existing Assignable Distribution.

Select to create a new Routing Sheet or use an existing Assignable Distributions

If you want your users to have a choice of creating a Routing Sheet or using an existing Assignable Distribution, do not edit the configuration.XML file as this is the default setting.

To return to the default setting:

1 Open the ...\Omtool\AccuRouteDesktop\configuration.XML file with Notepad and remove the comment attribute from the following CommandLine:

```
<CommandLine>-v="$/DMSPrompt.omv" -r="%TEMP%\omARRecipient.xml" -
t="%prDMSDocName% %DATE% %TIME%" -nodmsenum -cachedemail -
action=prompt</CommandLine>
```

This CommandLine displays the following window when using the right-click functionality within the DMS application.

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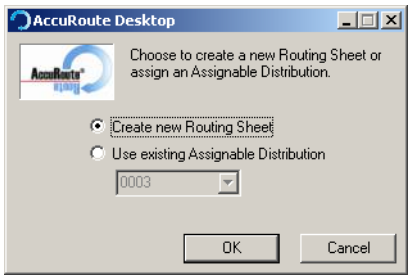

2 Add the comment attributed to the CommandLine you wish to disable.

Configuring the default setting on the display window

When you are allowing your users to select to either create a new Routing Sheet or use an existing Assignable Distribution, the default setting is **CREATE NEW ROUTING SHEET**. By editing the DMSPrompt.omv view file, you can change this default to **USE EXISTING ASSIGNABLE DISTRIBUTION**.

To change the default selection:

1 Go to the ...\Omtool\OmtoolServer\AccuRouteViews folder and make a copy of the DMSPrompt.omv file.

2 Open DMSPrompt.omv with Notepad or an XML editor.

3 Locate the **RCCREATENEWRS** prControlId.

4 Locate the prSetChecked property and change the value from `1` to `0`.

```
<prSetChecked>0</prSetChecked>
```

5 Locate the **RCASSIGNDIST** prControlID.

6 Locate the prSetChecked property and change the value from `0` to `1`.

```
<prSetChecked>1</prSetChecked>
```

7 Save and close the file.

Tip When you save the DMSPrompt.omv file, it might be renamed with a .TXT extension. Check the ...\Omtool\OmtoolServer\AccuRouteViews folder and make sure the file is named DMSPrompt.omv. If you see it named DMSPrompt.omv.txt, rename it to remove the .TXT extension.

8 Use the right-click functionality within the DMS application. After connecting to the server, the default selection is now set to **USE EXISTING ASSIGNABLE DISTRIBUTION**.

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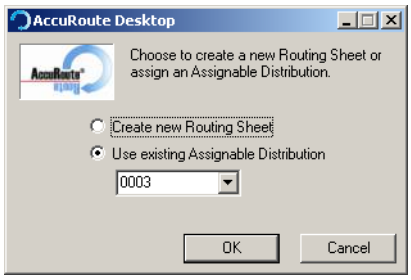

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Section 8: Creating Assignable Distributions

This section includes:

Creating Assignable Distributions (8-1)

Creating Routing Sheets or barcode labels for Assignable Distributions (8-4)

Enabling Microsoft Word macro to auto-complete mail merge and print Routing Sheets or barcode labels to the default printer (8-10)

This is a multi-step process:

- First, the administrative user creates the Assignable Distributions for one or more users.
- Next, the administrative user takes the output file created by the AccuRoute Assignable Distributions Creator and uses a supported Mail Merge program to create Routing Sheets.
- Finally, the Routing Sheets that contain the Assignable Distributions are distributed to the user they were created for.

Creating Assignable Distributions

Note The Routing Sheets and barcodes generated by the Assignable Distributions Creator should be printed to a hard copy and then scanned on a device for routing by the AccuRoute Server.

Use the following procedure to create Assignable Distributions for a specific user.

To create Assignable Distributions:

1 Go to **START › OMTOOL > ACCUROUTE ASSIGNABLE DISTRIBUTIONS CREATOR**. The **Connect to Server** page opens.

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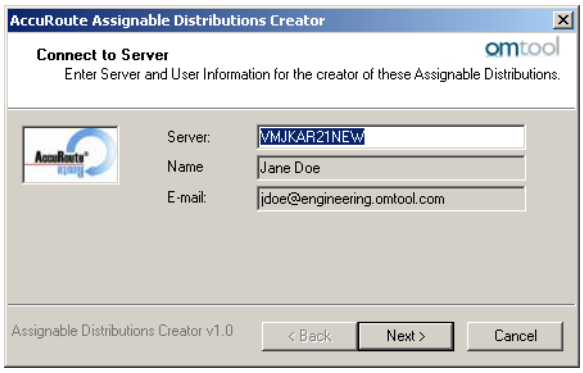
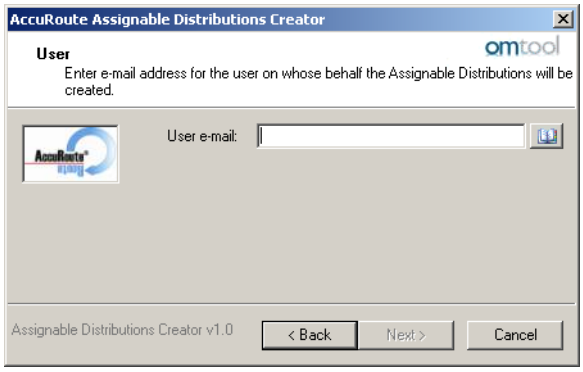
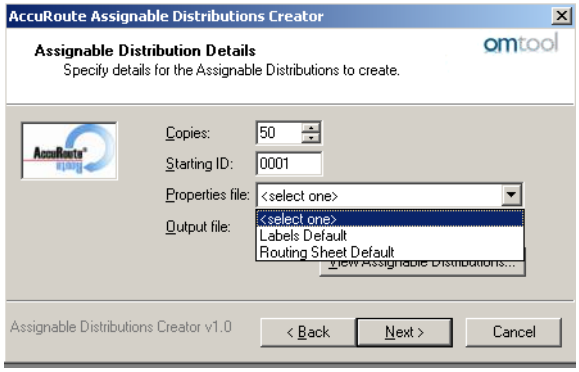


2 Enter the Omtool server name (if necessary) and click **NEXT**. The **User** page opens.



3 In the User e-mail text box, enter the email address of the user for whom you are creating Assignable Distributions for. You can also click Address Book to select a user from the address book if you do not know the email of the user.

4 Click **NEXT**. The **Assignable Distribution Details** page opens.



5 Complete the following fields:

- **COPIES** - Use the spin box to set the number of Assignable Distributions you wish to create for this user. The spin box allows you to specify up to 100 copies. To create more than 100 copies, manually enter the value. The maximum number of Assignable Distributions that you can create is 1000. If you need to create more than 1000 copies, run Assignable Distributions Creator again.

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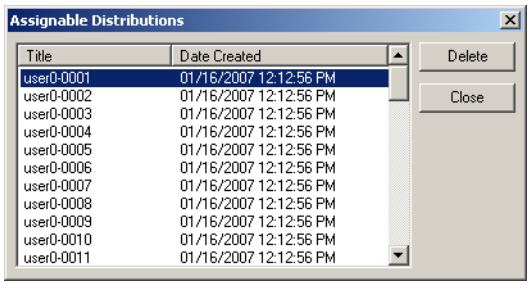
- **STARTING ID** - This field defaults to 0001 the first time you open Assignable Distributions Creator. After the first use, the Starting ID defaults to one greater than the last number the user created. For example, if you had previously created five Embedded Directives, the Starting ID would be 0006. You can modify this value, but you cannot enter a value less than one greater than the last number the user created.
- **PROPERTIES FILE** - Choose from the following:

  Labels Default (if you want to generate barcode labels)

  Routing Sheet default (if you want to generate Routing sheets)

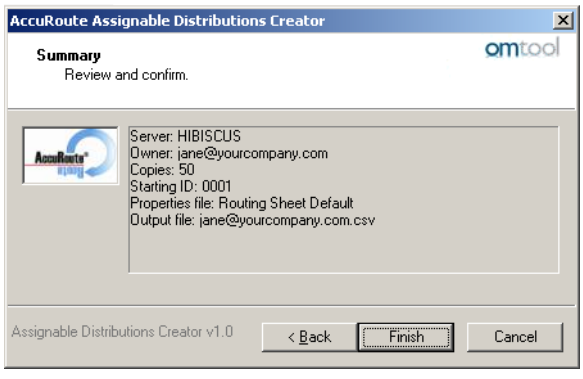
  Assignable Distributions Creator installs default properties files barcode labels (AssignableDistributionBarcodeLabels.doc) and routing sheet (RoutingSheetMailMerge.doc). You can also create as many customized files as are necessary. For information, see Optional configurations for Legal Option Pack (7-1)
- **OUTPUT FILE** - The name of the output file. This file name defaults to the `<user's e-mail address>.csv`, (for example, jane@yourcompany.com.csv) but you can modify this field as needed. the only supported file type is .csv.

6 Click **VIEW ASSIGNABLE DISTRIBUTIONS** to open a page listing all available unassigned distributions for this user. Assigned distributions do not appear on this list.



7 If you want to delete an unassigned distribution, select the distribution and click **DELETE**. Click **CLOSE** to return to the **Assignable Distribution Details** page.

8 Click **NEXT**. A summary of your selection opens.



Note The output file is saved to the **...\OMTOOL\ACCUROUTE LEGAL OPTION\OUTPUT** folder on the administrative user's workstation.

9 Click **FINISH**.

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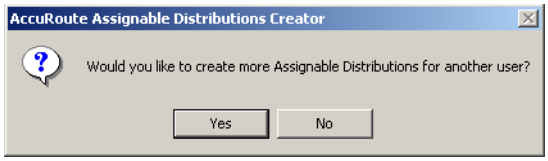
AccuRoute Assignable Distributions Creator creates the defined Assignable Distributions and displays the following message box:



10 To create distributions for another use, click **YES**, otherwise, click **NO** to close AccuRoute Assignable Distributions Creator.

Tip If you create Assignable Distributions using an output file name that already exists, the date and time are appended to the end of the newest file name.

Creating Routing Sheets or barcode labels for Assignable Distributions

You can create Routing Sheets or barcode labels for unassigned distributions using a supported Mail Merge program and the output file that contains unassigned distributions. At this time, Omtool supports Mail Merge using Microsoft Word. The mail merge template files, **RoutingSheetMailMerge.doc** and **AssignableDistributionBarcodeLabels.doc**, are located in **...\OMTOOL\ACCUROUTEDESKTOP\OUTPUT** folder.

To create Routing Sheets or barcode labels for Assignable Distributions using Microsoft Word 2003:

1 Open one of the template file using Microsoft Word.

- To create Routing Sheets, open RoutingSheetMailMerge.doc

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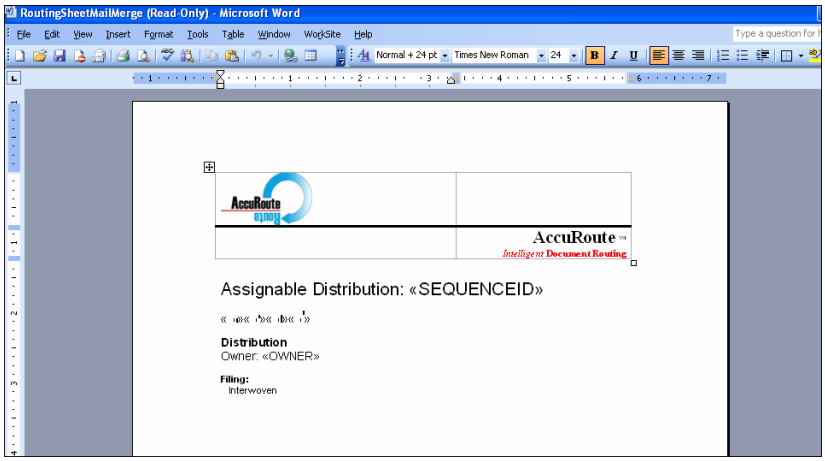
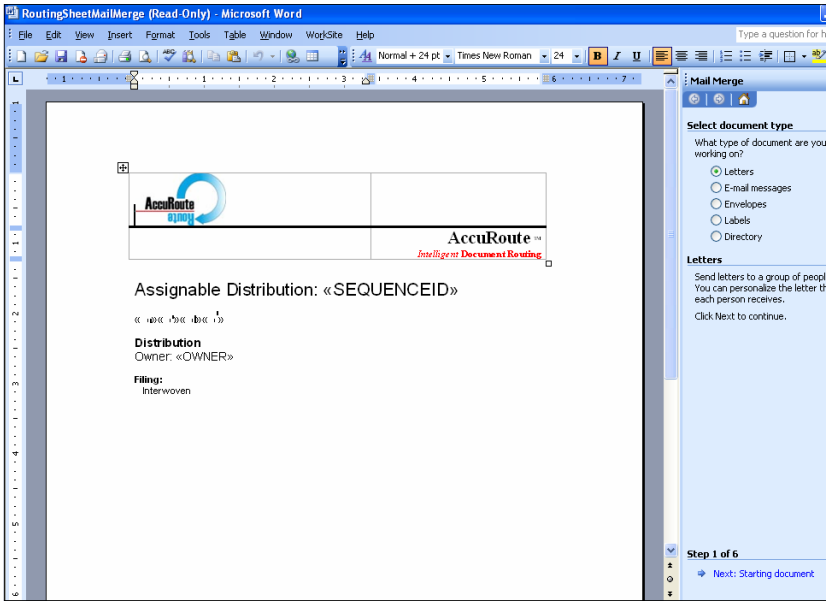
- To create barcode labels, open AssignableDistributionBarcodeLabels.doc.



Note **Step 2 - 10** shows the RoutingSheetMailMerge.doc modified. The process for modifying the AssignableDistributionBarcodeLabels.doc is similar.

2 Click **TOOLS > LETTERS AND MAILINGS > MAIL MERGE**. The Mail Merge task pane opens showing **Step 1** of the Mail Merge process.



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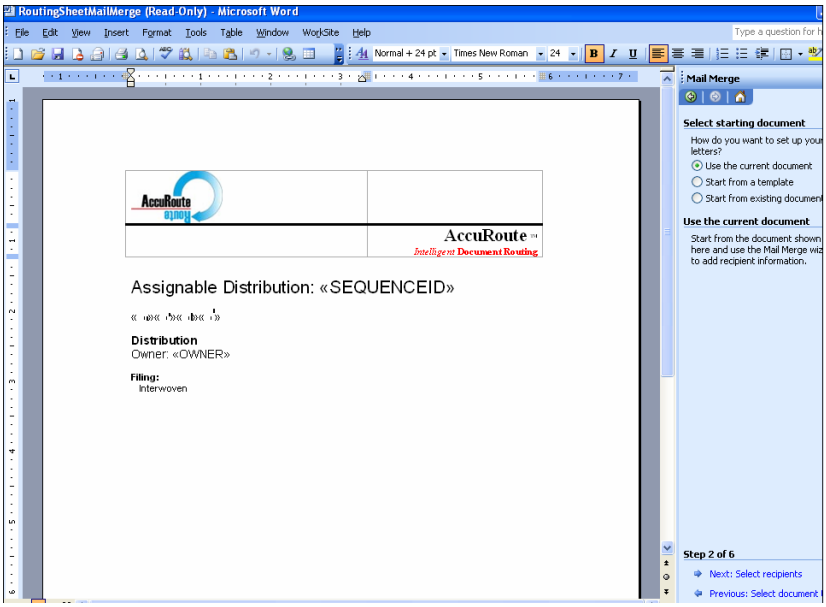
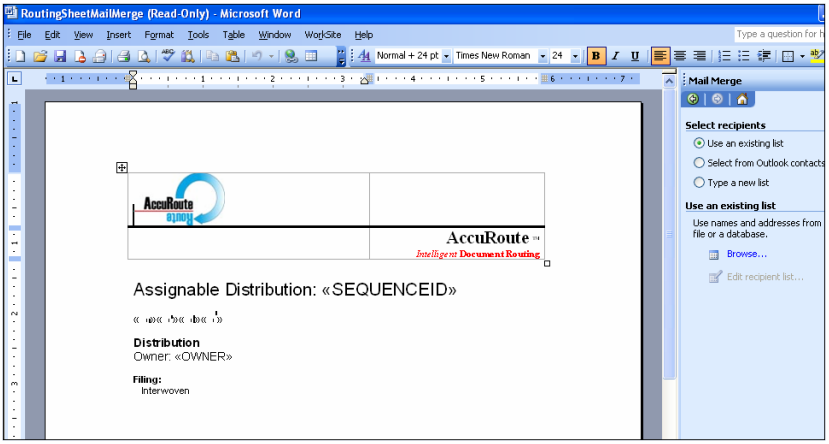
3 On the task pane, select **LETTERS** and click **NEXT: STARTING DOCUMENT** on the bottom right. **Step 2** of the Mail Merge process opens.



4 Select **USE THE CURRENT DOCUMENT** and click **NEXT: SELECT RECIPIENTS** on the bottom right. **Step 3** of the Mail Merge process opens.



5 Click **BROWSE** under **USE AN EXISTING LIST** in the take pane. The **Select Data Source** page opens.

6 Navigate to the location of your output file (the default location is **...\OMTOOL\ACCUROUTE LEGAL OPTION PACK\PROPERTIES**).

7 Select the output file and click **OPEN**.

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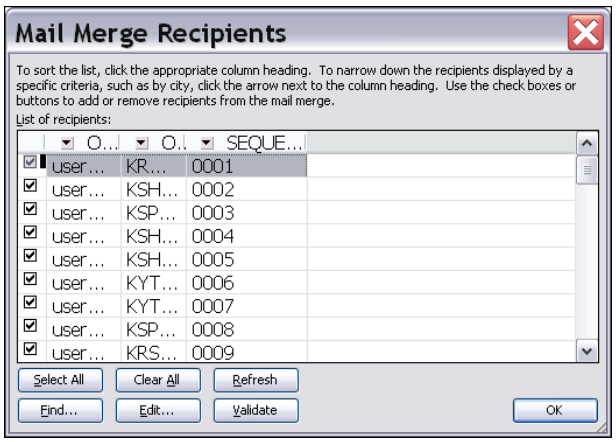
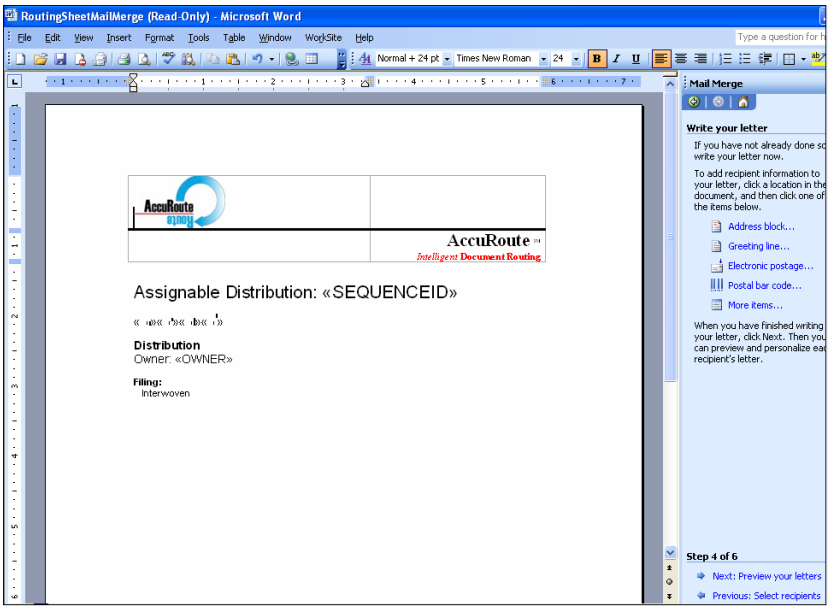
8 Click **OK**. The **Mail Merge Recipients** page opens.



9 Click **OK** to close the Mail Merge Recipients page.

10 Click **NEXT: WRITE YOUR LETTER** on the bottom right. **Step 4** of the Mail Merge process opens.



11 Click **NEXT: PREVIEW YOUR LETTERS** on the task pane. **Step 5** of the Mail Merge process opens.

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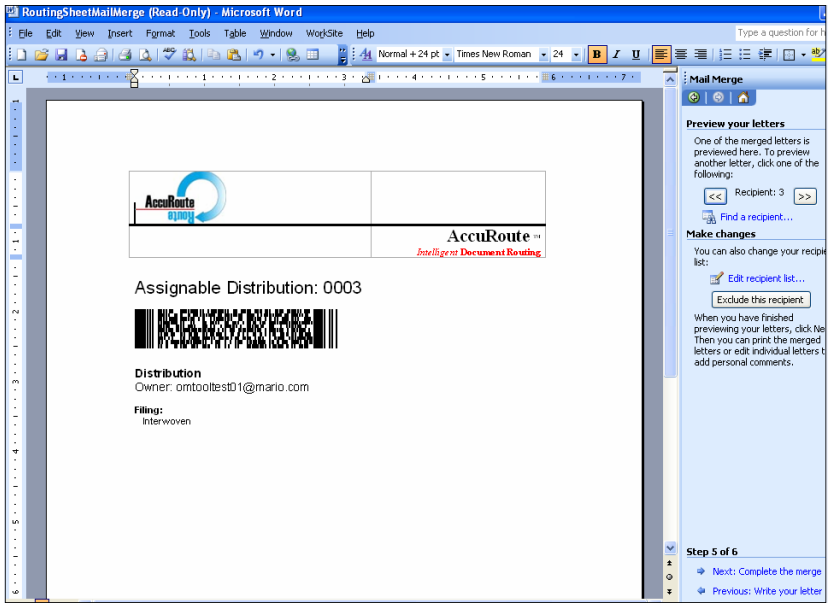
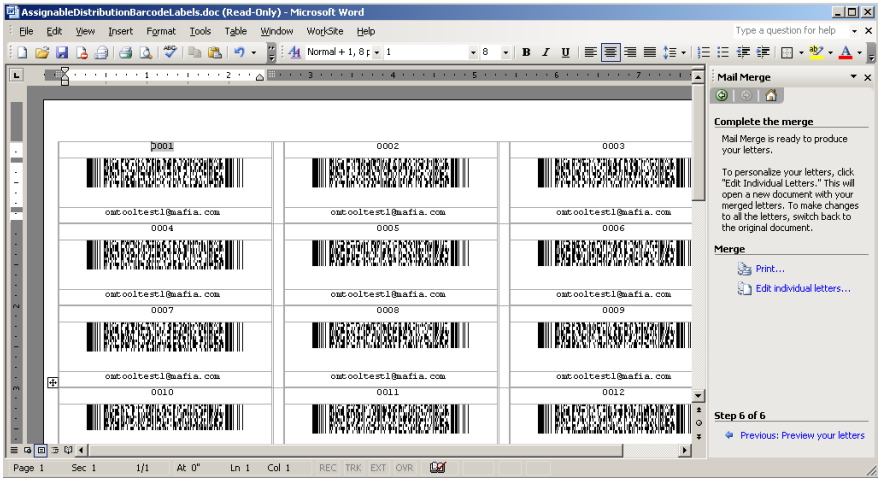
- If you are editing the RoutingSheetMailMerge.doc. you see a preview of a Routing Sheet complete with an Assignable Distribution.



- If you are editing the AssignableDistributionBarcodeLabels.doc, you see a preview of the barcode labels complete with an assignable distribution.



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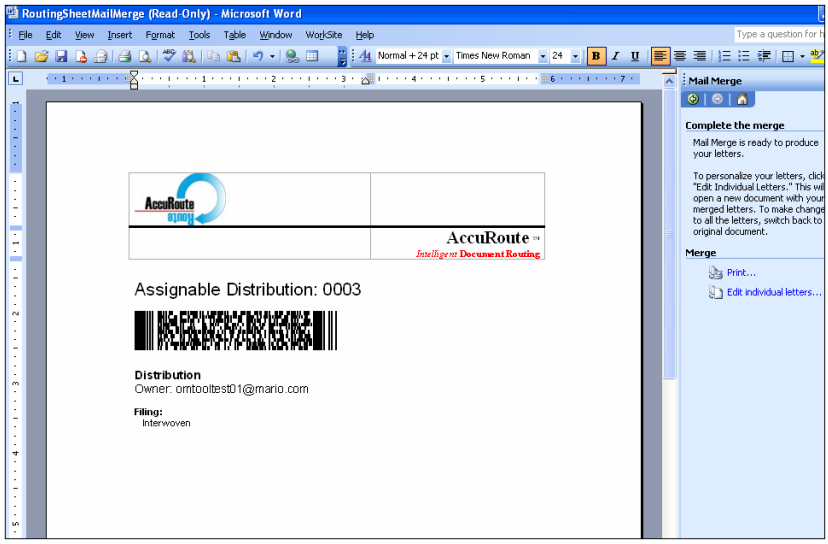
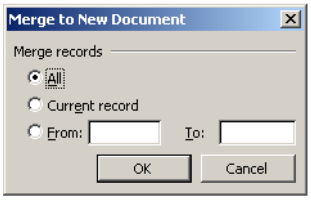
12 Click **NEXT: COMPLETE THE MERGE** on the bottom right. **Step 6** of the Mail Merge process opens.



13 Click **EDIT INDIVIDUAL LETTERS** in the right panel. The **Merge to New Document** window appears.



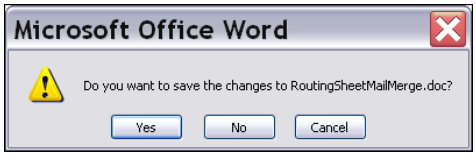
14 Select **ALL** and click **OK**.

Each unassigned distribution is written to an individual Routing Sheet. For example, if you created 50 unassigned distributions, the Mail Merge program creates 50 Routing Sheets.

15 From the **FILE** menu, select **SAVE AS**, assign a unique file name to the document, and click **SAVE**.

16 Close RoutingSheetMailMerge.doc /AssignableDistributionBarcodeLabels.doc file that you were editing.

17 When the following message box appears, click **NO**.



Note Do not select Yes to this question. Selecting Yes saves the data from the output file within the template itself.

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Enabling Microsoft Word macro to auto-complete mail merge and print Routing Sheets or barcode labels to the default printer

The Assignable Distribution Creator also has the ability to enable a Word macro that automatically completes the Mail Merge process and prints the converted document (Routing Sheets or barcode labels) to the default printer. To enable the Word macro, you must edit the `config.xml` file.

To edit the config.xml file:

1. Navigate to**...\OMTOOL\ACCUROUTE LEGAL OPTION PACK**.
2. Locate config.xml file.
3. Make a backup copy of the file.
4. Edit the file using the instructions below.
   - For **RoutingSheetMailMerge.doc**, remove the default code and add the following code:
     ```
     <configuration>
     <emailintegration>Outlook</emailintegration>
     <wordmacro>DoMailMerge</wordmacro>
     <wordtemplate>RoutingSheetMailMerge.doc</wordtemplate>
     </configuration>
     ```
   - For **AssignableDistributionBarcodeLabels.doc**, remove the default code and add the following code:
     ```
     <configuration>
     <emailintegration>Outlook</emailintegration>
     <wordmacro>DoMailMerge</wordmacro>
     <wordtemplate>AssignableDistributionBarcodeLabels.doc</
     wordtemplate>
     </configuration>
     ```
5. Save the file.
6. Click **OK** to close the page. Follow the rest of the steps involved in creating the Distribution.

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Section 9: Testing

This section includes:

Assigning a distribution from a DMS application (9-1)
Attaching a document from DeskSite to AccuRoute Desktop (9-4)
Auto populating billing fields in AccuRoute Desktop (9-4)

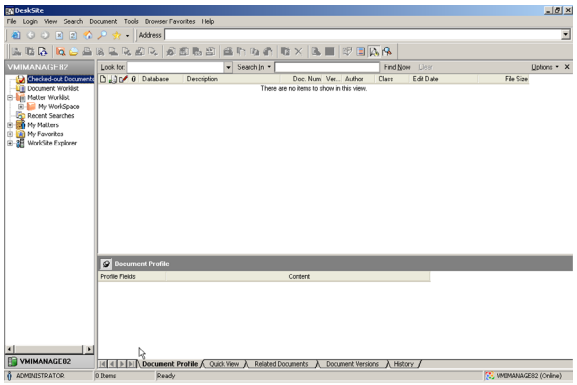
Assigning a distribution from a DMS application

Use the following procedure to:

- attach an unassigned distribution using the DMS application
- place the Routing Sheet containing that assigned distribution in front of your hard copy document
- scan it directly into the DMS application.

To assign a distribution from an DMS application:

1 Open the DMS application.



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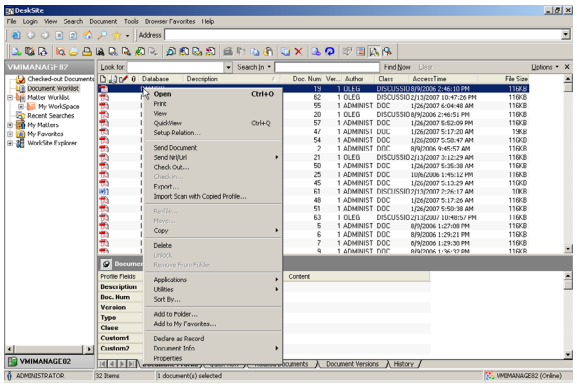
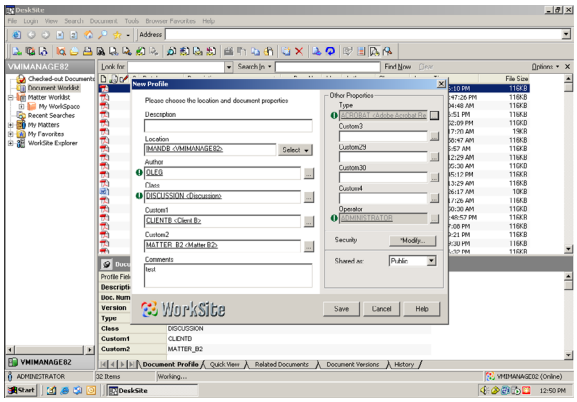
2 Open the New Profile page without pre-populated information by selecting **FILE > IMPORT SCAN**, or right-click a folder or document to open the New Profile window with pre-populated information.

The right-click menu item differs depending on whether you select a folder or a document:

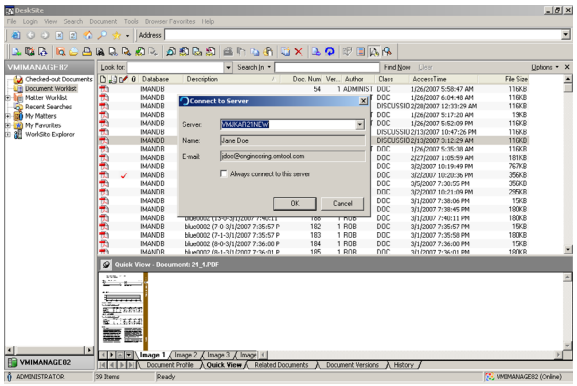
- Folder right-click menu item: **IMPORT SCAN**
- Document right-click menu item: **IMPORT SCAN WITH COPIED PROFILE**



3 Select either **IMPORT SCAN** or **IMPORT SCAN WITH COPIED PROFILE**. The **New Profile** page opens.



4 Enter appropriate description in the **DESCRIPTION** field and click **SAVE**. The **Connect to Server** page opens on top of the DMS application.



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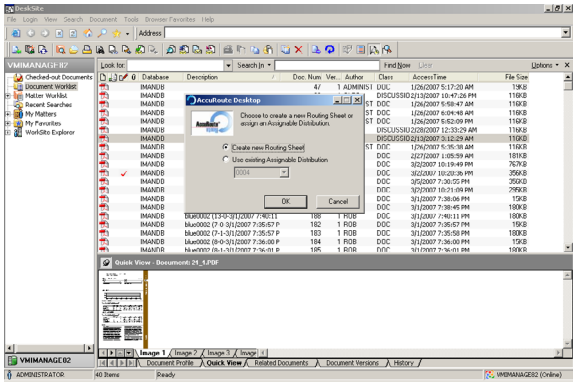
5 Click **OK**. The **AccuRoute Desktop** page opens.

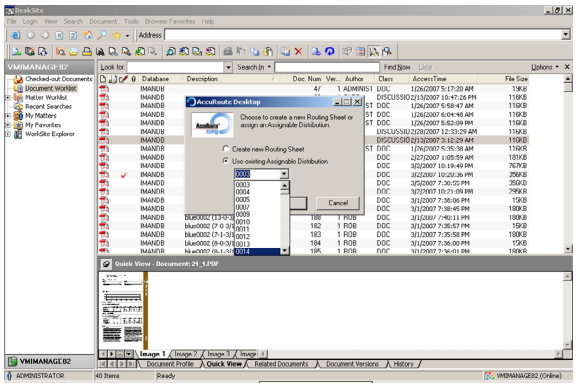


From this window you can either create a new Routing Sheet or use an existing Assignable Distribution.

Your choices may differ depending on your company's configuration.

Note If you create a Routing Sheet at this point, the Routing Sheet assumes the AccuRoute Desktop preferences. For example, if AccuRoute Desktop is configured to always create Embedded Directives that are multiple use, the Embedded Directive created by the Create New Routing Sheet option will use these same settings.

6 Select **USE EXISTING ASSIGNABLE DISTRIBUTION** and either select or enter an available unassigned distribution from the field.



7 Click **OK**.

8 Place the corresponding Routing Sheet for the distribution you just assigned in front of your hard copy document.

9 Go to a network scanning device to send the document to AccuRoute to be routed directly to the DMS application.

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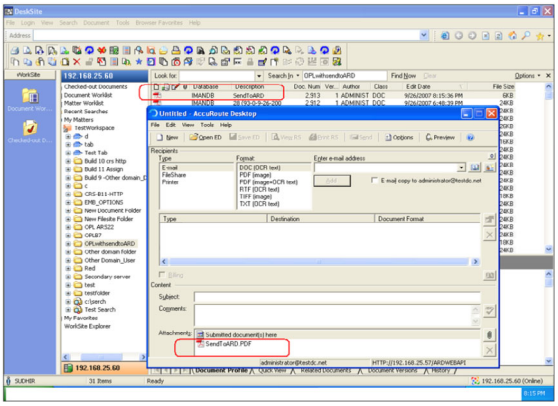
Attaching a document from DeskSite to AccuRoute Desktop

To attach a document from DeskSite to AccuRoute Desktop directly

1 Open DeskSite and select the document that you want to attach.

2 Right click the document. Select **SEND TO ACCUROUTE** from the drop down menu options.

The **AccuRoute Desktop** application opens. The document you selected is added as an attachment.



Auto populating billing fields in AccuRoute Desktop

Before you test, verify that you have completed the required Omtool server configurations for auto populate to happen. For more information, see Configuring auto population of billing information in AccuRoute Desktop (optional) (4-3)

The example below shows how auto populate of billing fields works in Autonomy DeskSite.

To test auto populate billing in AccuRoute Desktop:

1 Open DeskSite and select the document that you want to attach.

You must select a document whose billing fields are filled in from before.

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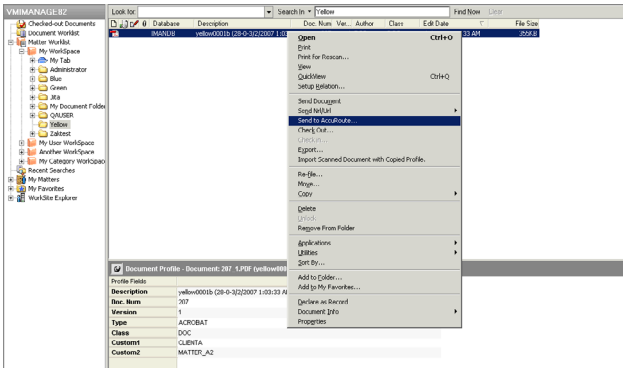
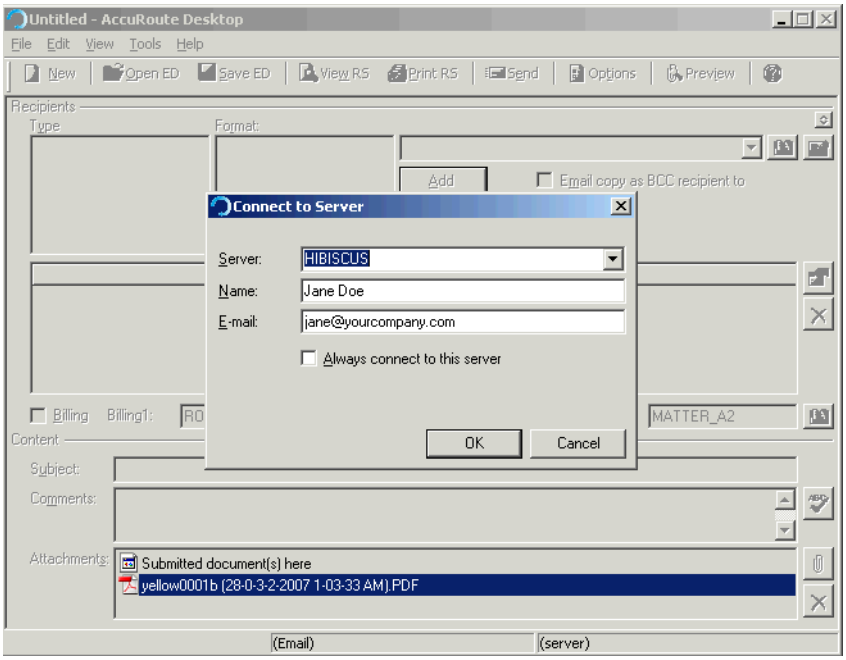
2 Right click the document. Select **SEND TO ACCUROUTE** from the drop down menu options.



The **AccuRoute Desktop** application opens prompting you to login. The document you selected is added as an attachment.



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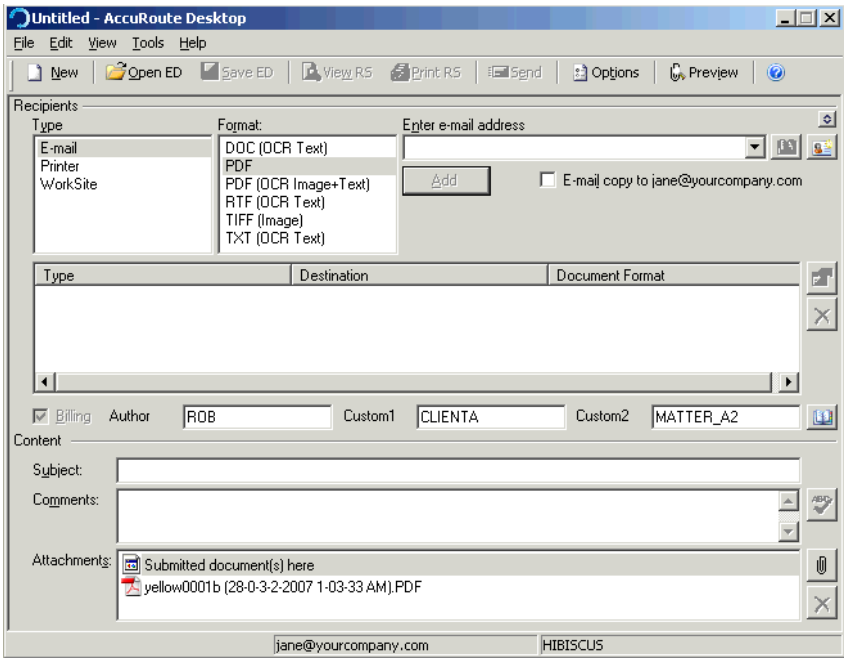
3 Login to AccuRoute Desktop.

The billing fields, (in this case **Custom 1** and **Custom 2**) are filled in with the information from the documented in DeskSite repository.



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Appendix: Control identifiers

Some features in a view can be modified or removed. Examples of such features are buttons, checkboxes, and labels. For more information on control identifiers, consult the AccuRoute Desktop installation guide.

Legal Option Pack has six additional control identifiers as listed below.

Table A-1: **Controls for the Legal Option Pack**

Friendly description	Control ID	Type	Function
ProductLogo	bmpLogo	label	Displays the AccuRoute logo.
User instructions	lblInstructions	label	Shows text that explains what the user should do.
Create New RS	rcCreateNewRS	radio button	Allows the user to choose to create a new Routing Sheet.
Assign Distribution	rcAssignDistribution	radio button	Allows the user to assign the distribution to a DMS profile.
OK button	btOK	button	OK button.
Cancel button	btCancel	button	Cancel button.

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