
AccuRoute[®] Server and Clients Upgrade Guide

Upgrading to AccuRoute v3.01

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Section I: Introduction

The upgrade guide contains instructions on upgrading your legacy AccuRoute environment to AccuRoute Server v3.01. It is written for the Omtool Server administrators with detailed knowledge of AccuRoute, the Windows operating system and the LAN.

This section includes:

- [About AccuRoute](#) (I-1)
- [Supported upgrade environment](#) (I-2)
- [About the upgrade](#) (I-1)
- [Related documentation](#) (I-5)

About AccuRoute

AccuRoute is Omtool's award-winning document-handling platform that captures, converts, routes and archives both paper and electronic-based documents enabling fast, secure, simultaneous distribution of data to multiple destinations in multiple formats. Using AccuRoute, an organization can deliver information faster with more efficient workflows while reducing the cost, complexity and risk.

About the upgrade

The steps involved in upgrading a legacy AccuRoute Server to AccuRoute v3.01 are as follows:

- Preparing the legacy AccuRoute Server for the upgrade.

Important Upgrading to AccuRoute v3.01 has been qualified from AccuRoute v2.3 only. If you are running an older version of AccuRoute Server, upgrade to AccuRoute v2.3 and then follow the instructions in this guide to upgrade to AccuRoute v3.01.

- Upgrading the following interfaces: AccuRoute Server, Remote Administrators, Remote AccuRoute Compose Components (Composers), Remote AccuRoute Connectors for DMS Libraries, Remote Embedded Directive Managers, Remote Modem Servers and clients.

- Configuring the AccuRoute Server if necessary.

Note Open Text Document Management (formerly Livelihood ECM - eDOCS™ DM and Hummingbird DM) is not qualified in this release since DM5.x and DM6 clients not being supported in 64bit environments. Please check back in the near future for updates.

Supported upgrade environment

The following sections list the supported operating systems, server, client, database and modem versions. Use the information as a check list and ensure you have the supported versions before you start the upgrade.

Server Operating System

- Windows® 2008 64 bit
- Windows 2003 SP2 64 bit

Database

- Microsoft® SQL Server 2005/ 2008
- Microsoft SQL Express 2008

Important Microsoft SQL 2000 is no longer supported. If you are using SQL 2000, Omttool requires that you upgrade to SQL 2005/2008 or SQL Express 2008 prior to upgrading your AccuRoute Server.

Modem board

- Brooktrout TR1034 with Boston v6.1.0 drivers
- Brooktrout Trufax RoHS only with Boston v6.1.0 drivers

Note Trufax board models that are older than the ones listed above are not supported.

- SR140 module (virtual board) with Boston v6.1.0 driver

Omttool Server

- AccuRoute v2.3

Client Operating System

- Windows XP SP3

- Windows Vista

Note Windows Vista does not support AccuRoute desktop printer.

AccuRoute Desktop

- AccuRoute v2.2.3

Note AccuRoute Desktop versions that are older than v2.2.3 are not supported.

Important information on Remote Administrators, Composers, AccuRoute Connectors for DMS Libraries, Embedded Directive Managers and Modem Servers

All systems in your environment must use the same version of AccuRoute. Therefore, when you decide to upgrade your legacy AccuRoute Server to AccuRoute v3.01, you must upgrade all systems that comprise your environment. This includes Remote Administrators, Remote Composers, Remote AccuRoute Connectors for DMS Libraries, Remote Embedded Directive Managers and Remote Modem Servers.

Important Once you upgrade the AccuRoute Server, all Remote Composers go offline until you upgrade them.

Note about ObjectArchive™ database

If you are planning to setup and use ObjectArchive, verify that the system where you will install ObjectArchive meets the following requirements.

Hardware and software requirements for ObjectArchive

- Windows NT domain computer that always runs in the same domain as the AccuRoute Server
- Dual core processor; 2 GHz; 4GB of RAM; RAID 5W with 100 GB of disk space; DVD-ROM drive; and Microsoft mouse or compatible pointing device
- Windows 2008 64 bit, 2003 Standard Edition SP2 64 bit

❑ MS SQL Server 2008/2005

Note ObjectArchive must be installed on a system remote from AccuRoute Server. The SQL Server does not have to be the same one used for the AccuRoute Server databases.

Note about Remote AccuRoute Intelligent Device Client

When you upgrade your AccuRoute Server, you must upgrade all instances of the remote AccuRoute Intelligent Device Client in your environment. For instructions on installing, configuring and removing the remote client, consult the [AccuRoute Server installation and integration guide](#).

Note about Composers

When you install AccuRoute Server v3.01 as a new install, it creates one General Composer and one OCR Composer. This allows for the OCR Composer to be off-loaded more easily, freeing up valuable system resources.

However, when you upgrade from a legacy server to AccuRoute Server v3.01, you may have only one instance of the Composer since the upgrade will not change your Composer configuration. You can add additional Composers, and configure a Composer to handle only OCR jobs. Contact [Omtool Sales](#) for more information.

Note about AccuRoute clients

The installation setup files for the AccuRoute clients are located in the Clients directory of the AccuRoute Server. After you have finished installing the AccuRoute Server, you must configure the Clients folder within the Omtool directory. This is necessary because systems which will install the AccuRoute Desktop and other clients remotely must have access to this folder containing the setup files. For instructions on how to configure the share, see [Configuring the client install directory share](#) (3-8).

Note AccuRoute Desktop Clients v2.2.3 or higher are supported with AccuRoute Server v3.01. Therefore, if you have AccuRoute Desktop Clients v2.3 deployed in your environment, upgrading them to v3.01 is not a requirement. However, Omtool recommends that you upgrade to the latest version of AccuRoute Desktop client to take advantage of the latest features.

Important information about server clusters

AccuRoute is a cluster-aware application. If you plan to use the server cluster functionality after the upgrade, consult [Appendix A: Setting up an AccuRoute Server cluster](#) section in the [AccuRoute Server Installation and Integration Guide](#) for an overview of the clustering functionality and instructions on setting up the cluster.

Note Read this upgrade manual in its entirety and plan your upgrade accordingly. If you have additional questions or require assistance in upgrading, contact Omttool support.

Related documentation

A complete list of all documentation related to AccuRoute v3.01 is available online at: <http://www.omttool.com/documentation/accuroute/v3.01/documentation.htm>.

For details on new features and enhancements in AccuRoute v3.01, see [AccuRoute v3.01 Release Notes](#).

Section 2: Preparing for the upgrade

This section includes:

[Verifying the version of your AccuRoute Server](#) (2-1)

[Preparing the AccuRoute Server](#) (2-1)

Verifying the version of your AccuRoute Server

Note You can upgrade to AccuRoute v3.01 only if you are running AccuRoute v2.3. If you are running AccuRoute v2.1 or v2.2, upgrade to v2.3 and then follow the instructions in this guide to upgrade to v3.01. For information on how to upgrade to AccuRoute v2.3, see [AccuRoute v2.3 and Genifax v3.6 Server and Clients Upgrade Guide](#).

To check the version of your server:

- 1 Start the Omtool **Server Administrator**.
- 2 In the console tree, right click the AccuRoute Server name.
- 3 Select **PROPERTIES** from the drop down menu.
The version is listed in the **GENERAL** tab of the **Properties** page.
- 4 Verify that the version of the server is AccuRoute v2.3.

Preparing the AccuRoute Server

This section includes:

[Verifying a Windows Active Directory environment](#) (2-2)

[Pre-requisite check for 64 bit systems](#) (2-2)

[Verifying that the DSN registry key contains an ODBC connection string](#) (2-3)

[Backing up the database](#) (2-3)

[Backing up the server](#) (2-4)

[Disabling the cleanup task](#) (2-4)

[Backing up the templates](#) (2-5)

[Reviewing custom views](#) (2-5)

[Obtaining login credentials of the system running the AccuRoute Server](#) (2-5)

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[Verifying Internet Explorer Enhanced Security Configuration is disabled](#) (2-7)

[Enabling 8.3 Name Creation on NTFS Partitions](#) (2-7)

[Verifying fax board drivers \(for servers with fax capability\)](#) (2-8)

[Reviewing configuration data of AccuRoute Connector for LexisNexis® Concordance®](#) (2-8)

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[Backing up OmISAPIURicoh.xml if using Ricoh Embedded Software Architecture \(ESA\) Device Client](#) (2-8)

[Backing up Cost Recovery custom configurations](#) (2-9)

You must prepare the AccuRoute Server and the systems in the environment before you upgrade.

Verifying a Windows Active Directory environment

Before you proceed further, verify that the system where running the AccuRoute Server has an active Windows Active Directory. This is of critical importance since AccuRoute v3.01 can only be installed in Windows Active Directory environment. All server security and authentications are dependent on the Active Directory authentication.

Pre-requisite check for 64 bit systems

For 64 bit systems, configure the following.

Configure IIS to run 32-bit applications

To configure IIS to run 32 bit applications:

- 1 Open a command prompt, and navigate to location: **C:\INETPUB\ADMINSCRIPTS**.
- 2 Enter:
`cscript.exe adsutil.vbs set W3SVC/AppPools/Enable32BitAppOnWin64 true`
- 3 Press **ENTER**.
For information on related command to switch modes, see <http://support.microsoft.com/kb/894435>.

Configure Microsoft.Net

To register asp.net in 32 bit mode:

- 1 Open a command prompt, and enter:
`C:\Windows\Microsoft.net\Framework\v2.0.50727\aspnet_regiis.exe -i`

- 2 Press **ENTER**.

Note This registration is only required if you are planning to install/upgrade AccuRoute Web Client.

Verifying that the DSN registry key contains an ODBC connection string

The database for the AccuRoute Server requires an ODBC connection. Before you upgrade, check the DSN registry key and verify that it contains a complete ODBC connection string (and not a reference to a predefined data source).

To verify that the DSN registry key contains an ODBC connection string:

- 1 Click **START > RUN** to open a Windows command prompt.
- 2 Enter `regedit`. Click **OK**.
The **Registry Editor** opens.
- 3 Navigate to:
HKEY_LOCAL_MACHINE\> SOFTWARE\Wow6432Node\OMTOOL\GENIFAX\CURRENT VERSION\DSN
- 4 Verify that the DB entry has a value beginning with `Driver = {SQL Server}`.
- 5 If necessary, build the connection string using the following syntax:

```
Driver={SQL Server}; Server=ServerName; Database=AccuRoute Server;  
UserID=" "; Password=" ";
```

where,

- ▶ `Server` is the name of the system where you installed the SQL Server.
- ▶ `Database` is the name of the database. **AccuRoute Server** is the default database for AccuRoute Servers.
- ▶ `UserID` and `Password` are the login credentials to be used for the database authentication.

Note If you are using Windows authentication, use null values as shown above. If you are using SQL authentication, use appropriate values for user name and password.

- 6 In a text file, note down the database name used in this key. You will need to supply the database name while backing up the database.
- 7 Close the registry editor.

Backing up the database

Before you upgrade, you must back up the database using the instructions below.

To back up and shrink the database:

- 1 Login to the system which has the AccuRoute Server database.
- 2 Click **START > ALL PROGRAMS > ADMINISTRATIVE TOOLS > SERVICES**.
- 3 Locate all Omtool services.
- 4 Right click each service and click **PROPERTIES** from the drop down menu.
- 5 On the **Properties** page, go to the **STARTUP TYPE** section and select **DISABLED** from the drop down menu.
- 6 Stop all Omtool services.
- 7 Using the Task manager, verify that all Omtool processes (beginning with Om*) are stopped.
- 8 Click **START > RUN** to open a Windows command prompt.
- 9 Back up the database using instructions provided by Microsoft in [http://msdn.microsoft.com/en-us/library/ms130214\(SQL.90\).aspx](http://msdn.microsoft.com/en-us/library/ms130214(SQL.90).aspx).
If necessary, change the name of the database while backing it up. You can also change the name of the backup file and the file path.
- 10 Locate the Omtool services and set the Startup Type to **Automatic**.
- 11 Start all Omtool services.

Backing up the server

Before you upgrade, you must back up the server in addition to backing up your database. For information on how to backup your server, login to the Omtool Knowledge Base using your customer number and see this article: <https://www.omtool.com/support/kbArticle.cfm?aID=1431>.

Disabling the cleanup task

Before you upgrade, you must disable the cleanup task so that it cannot run during the server upgrade.

To disable the cleanup task:

- 1 Open the Server Administrator.
- 2 Click **START > ALL PROGRAMS > OMTOL > OMTOL SERVER ADMINISTRATOR** to open the Administrator.
- 3 Expand the console tree and click **COMPONENTS**.
- 4 Double click **MAINTENANCE** component to open the **Properties** page.
- 5 Click **ADVANCED** to open the Maintenance Advanced Properties page.
- 6 Click **SCHEDULE**.
A popup opens prompting you to provide the username and its associated password.
- 7 Enter the user name and password that was provided during server installation.
- 8 Clear **ENABLED (SCHEDULED TASK RUNS AT SPECIFIED TIME)** option.

- 9 Click **OK** and then **OK** again to save your changes.

Backing up the templates

The setup program for the server upgrade overwrites all the files in these directories. Before you upgrade, you must back them up prior to running the server upgrade.

To backup your templates:

- 1 Make a backup copy of the Templates directory.

The Templates directory is located in:

C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\LANGUAGES\ENU\TEMPLATES where C: is the drive where the AccuRoute Server is installed.

- 2 Make a backup copy of the Embedded Directives directory.

This directory is located in:

C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\LANGUAGES\ENU\EMBEDDEDIRECTIVES where C: is the drive where the AccuRoute Server is installed.

Note These directories contain cover page templates, routing sheet templates, and notification templates for your server.

Reviewing custom views

Before you upgrade, you must review your custom views and note the criteria you used to create them.

Important This is a necessary step without which you will not be able to recreate them, if necessary, after the server upgrade.

Obtaining login credentials of the system running the AccuRoute Server

During server upgrade, the setup program prompts you for login credentials of the server account. (This is the same account you used to install the AccuRoute Server.) Before you upgrade, make a note of the login credentials of the system running the server.

Assigning distributed COM permissions

The AccuRoute Server requires that the server account and other system-related accounts have particular Distributed COM permissions. Before you upgrade, verify that the proper DCOM permissions are configured.

Configuring DCOM permissions on Windows 2008 and on Windows 2003

If you are using a Remote AccuRoute Intelligent Device Client, you must add Anonymous to the list of users and give him access, launch and activation permissions. For details, consult the [AccuRoute Server Installation and Integration Guide](#).

To configure DCOM permissions on Windows 2008 and on Windows 2003:

- 1 Log in to the system where you will install AccuRoute Server using the login credentials of the local Administrators group.
- 2 Click **START** and select **RUN**. Enter `dcomcnfg` and click **OK**. The **Component Services** snap-in opens.
- 3 Expand **COMPONENT SERVICES > COMPUTERS**. Right-click **MY COMPUTER** and select **PROPERTIES** from the menu options.
- 4 Click the **COM SECURITY** tab.
- 5 Under **Launch and Activation Permissions**, click the **EDIT LIMITS** button, and then click the **ADD** button.
- 6 Add **ANONYMOUS LOGON** in the **Permissions** list, select the **ALLOW CHECK BOX TO ALLOW THE LOCAL LAUNCH** permission, **LOCAL ACTIVATION** permission, **REMOTE LAUNCH** permission, and **REMOTE ACTIVATION** permission for the selected group
- 7 Click **OK** twice to save changes.
- 8 Restart the system for these configuration changes to take effect.

Cancelling messages in the In Process Queue

When preparing for the upgrade, you must wait for all messages to complete or cancel all messages in the **In Process** queue.

Note Any message located in the In Process queue at the time of the upgrade fails to compose; the message journal indicates that.

You must also notify AccuRoute users that they cannot send documents and faxes until the server upgrade and configuration is complete. It is recommended that you upgrade the server during off hours or when the volume of documents and faxes is low.

To cancel messages in the In Process queue:

- 1 Click **START > ALL PROGRAMS > OMT00L > OMT00L SERVER ADMINISTRATOR** to open the Administrator.
- 2 Expand the console tree and go to **MESSAGES > IN PROCESS**.
- 3 In the **Details** pane, select **ALL ITEMS** in the **View** menu.
- 4 Select all the items in the list. Right click and select **CANCEL** from the drop down options. You are prompted to confirm or cancel the operation.

- 5 Click **YES**.

Verifying Internet Explorer Enhanced Security Configuration is disabled

Verify that the Internet Explorer Enhanced Security Configuration is disabled.

Note You cannot upgrade to AccuRoute v3.01 if the Internet Explorer Enhanced Security Configuration is enabled. If it is enabled in your system, disable it and reboot the system before proceeding with the upgrade.

To verify that Internet Enhanced Security Configuration component is disabled:

- 1 Click **START > CONTROL PANEL > ADD OR REMOVE PROGRAMS**.
- 2 In the **Add or Remove programs** page, click **ADD/REMOVE WINDOWS COMPONENTS**. The **Windows Component wizard** opens.
- 3 Scroll down the Components list to find **Internet Explorer Enhanced Security Configuration**.
- 4 Verify that the component is disabled. If it is enabled, disable the component.
- 5 Manually start the SQL service.

Important When Internet Explorer Enhanced security configuration is disabled, the SQL service stops automatically. You must start the service before you can upgrade.

- 6 Reboot the system.

Enabling 8.3 Name Creation on NTFS Partitions

You must enable 8.3 Name Creation on NTFS Partitions to allow Ghostscript to work with long filenames or with spaces / odd characters in the filename during conversion.

To enable 8.3 Name Creation on NTFS Partitions:

- 1 Click **START > RUN**.
- 2 In the **OPEN** text box enter `regedit` to open the registry editor.
- 3 Go to **HKEY_LOCAL_MACHINE\SYSTEM\CURRENTCONTROLSET\CONTROL\FILESYSTEM**.
- 4 Right click the **NtfsDisable8dot3NameCreation** entry and select **MODIFY** from the drop down menu.
- 5 The **Edit DWORD Value** page opens.
- 6 In the **VALUE DATA** text box, enter `0`.
- 7 Click **OK** to close the page.

Verifying fax board drivers (for servers with fax capability)

The upgrade supports all new fax board drivers / modules for all supported fax boards including Brooktrout Technology SRI40, TRI034 series and TruFax RoHS series. It is recommended that you update the drivers for your fax boards during an upgrade.

Supported fax board drivers are:

- Brooktrout TRI034 with Boston v6.1.0 drivers
- Brooktrout Trufax RoHS only with Boston v6.1.0 drivers

Important Non RoHS TruFax boards are not supported in AccuRoute v3.01.

- SRI40 module (virtual board)

Reviewing configuration data of AccuRoute Connector for LexisNexis[®] Concordance[®]

If you are using a AccuRoute Connector for LexisNexis Concordance, review and note the configuration details. You will need this data to reconfigure the connector after server upgrade.

Note If you are using AccuRoute Connector for CT Summation or AccuRoute Connector for FTI[®] Ringtail[™], no review or reconfiguration is needed after the upgrade.

Note about Litigation Support Interface for CT Summation

There is no automatic upgrade of the old AccuRoute Connector for Summation. After the upgrade, you must manually remove the old connector and create a new and connector with the old configuration details.

Backing up OmISAPIURicoh.xml if using Ricoh Embedded Software Architecture (ESA) Device Client

If you are upgrading your server and have Ricoh Embedded Software Architecture (ESA) Device Client installed, copy the `omisapiuRicoch.xml` to a safe location before you run the upgrade on the server. After upgrade is complete, replace the file back to the `\SCRIPTS` folder. The Scripts folder is located in:

OMTOOL\OMTOOL SERVER\WEBAPI\OMTOOLWEBAPI\SCRIPTS

After you have copied over the file to the Scripts directory, modify the xml file for the **FilePostings** path.

Change the following:

```
<PostPath>Omtool ISAPI Services/FilePostings/</PostPath>
```

to reflect the new path:

```
<PostPath>OmtoolWebAPI/FilePostings/</PostPath>
```

Backing up Cost Recovery custom configurations

If you are upgrading your server and have Cost Recovery installed, you will need to uninstall and reinstall the Cost Recovery client. However, when you uninstall Cost Recovery, you lose all previous custom configurations. To keep these configurations and use them in the new Cost Recovery client, backup of the following files:

- CostRecovery.txt
- LFAccounting.ini
- LFCostRecovery.ini
- LFCostRecoveryU.ini

Additionally, if you want to keep previous data and if the file is not set to overwrite the previous record you should keep the cr.txt file.

Note about using HP[®] Chai Device Client

AccuRoute Server v3.01 does not support HP Chai Device Client. If you are using Chai and are upgrading to AccuRoute v3.01, download HP OXPd Device Client v1.4. For download, installation and configuration instructions, consult the [HP OXP v1.4 Installation and Integration guide](#).

Section 2: Preparing for the upgrade

Section 3: Applying the upgrade

This section includes:

[Downloading the server upgrade kit](#) (3-1)

[Upgrading the AccuRoute Server](#) (3-1)

[Upgrading Remote Administrators, Composers, AccuRoute Connectors for DMS Libraries, Embedded Directive Managers and Modem Servers](#) (3-6)

[Configuring the client install directory share](#) (3-8)

For information on how to upgrade AccuRoute Servers that are part of a cluster, see [Upgrading AccuRoute Servers in a cluster](#) (8-1)

Downloading the server upgrade kit

To download the AccuRoute v3.01 upgrade kit:

- 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.
- 5 Extract the files to a location on your AccuRoute Server.

Upgrading the AccuRoute Server

Note about CPU Core Check

The AccuRoute Server is now hard-licensed to CPU core count (that is, the server license has a built-in CPU core count capability). This capability will not allow you to install the server on a machine that has more core counts than the license allows. If the system has a higher CPU core count, contact [Omtool Sales](#) for a license with a higher core count and then proceed with server installation.

The standard AccuRoute license allows use of the product on a system with up to four (4) CPU cores. Anything larger than four CPU cores will need to go to an eight (8) core license. Anything larger will need a Data Center Server license. The Data Center Server license will support hardware with sixteen (16) or more CPU cores.

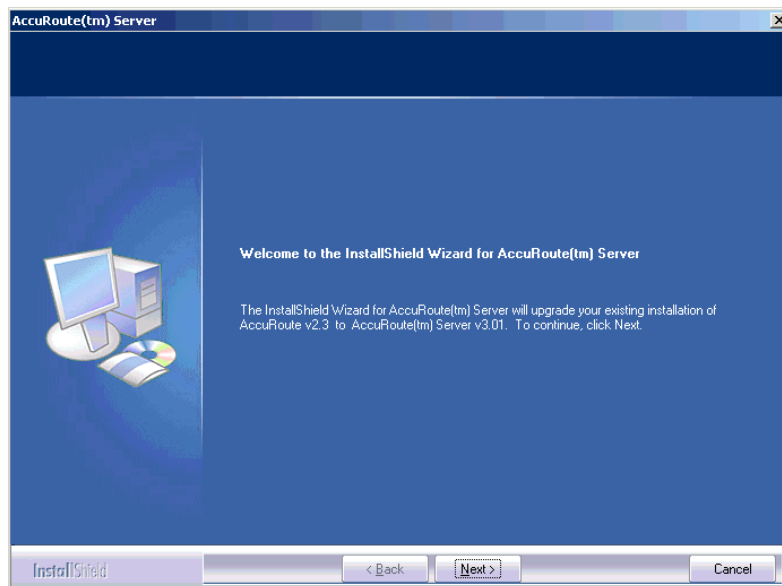
Important The upgrade will not continue without the proper license.

To upgrade the server:

- 1 Close all applications on the server.
- 2 Navigate to the directory where you saved the download.
- 3 Run **SETUP.EXE**.

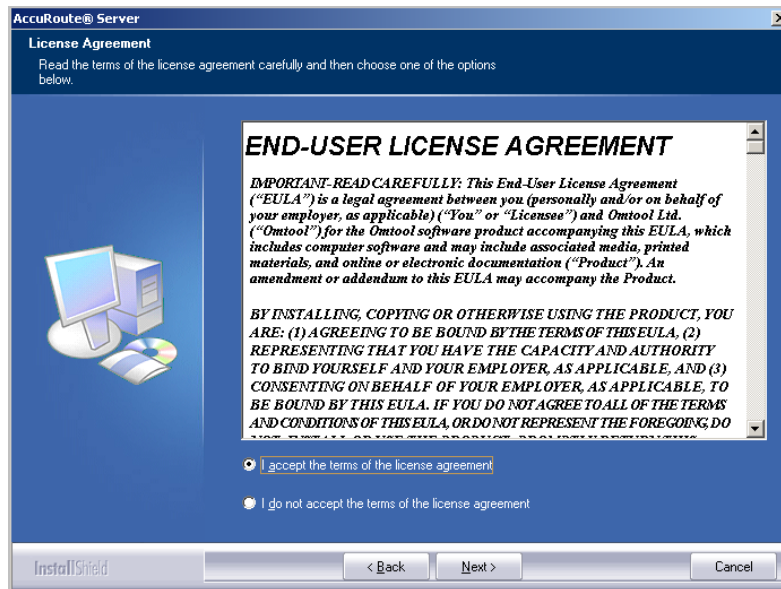
Note If you do not have an internet connection, you will see the following message:
Failed to determine the latest version of the Prerequisite checking package -2147012889: The server name could not be resolved.
Click **OK** to continue with the upgrade.

The InstallShield Wizard configures your system, detects a previous version of the server and shows the **Welcome** page.



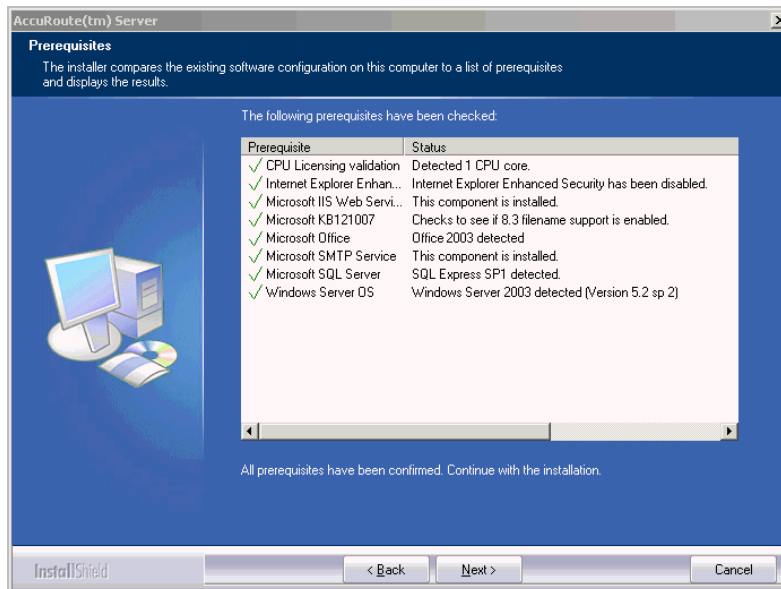
Note During the installation, if a dialog-box indicates that a running application needs to be closed before you proceed, close the running applications. Click **RETRY** and proceed with the installation. If the dialog box shows even after you have closed all running applications, click **IGNORE**. Proceed with the installation.

- 4 Click **NEXT**. The Command Prompt window may appear temporarily when the setup program stops the Omtool Address Book Manager service. The **License Agreement** page opens.



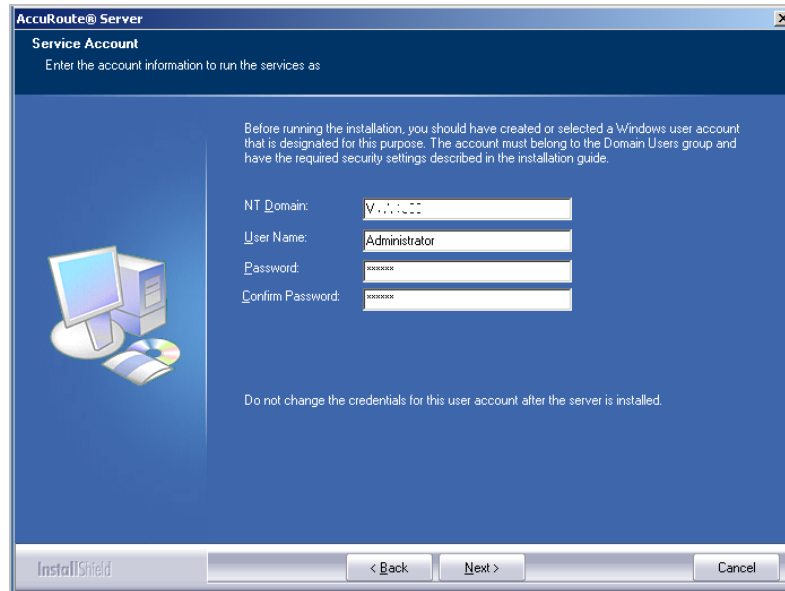
- 5 Read the license agreement and click the button beside the **I ACCEPT THE TERMS OF THE LICENSE AGREEMENT** option. Click **NEXT**.

The setup checks the system for installation requirements and displays the results.



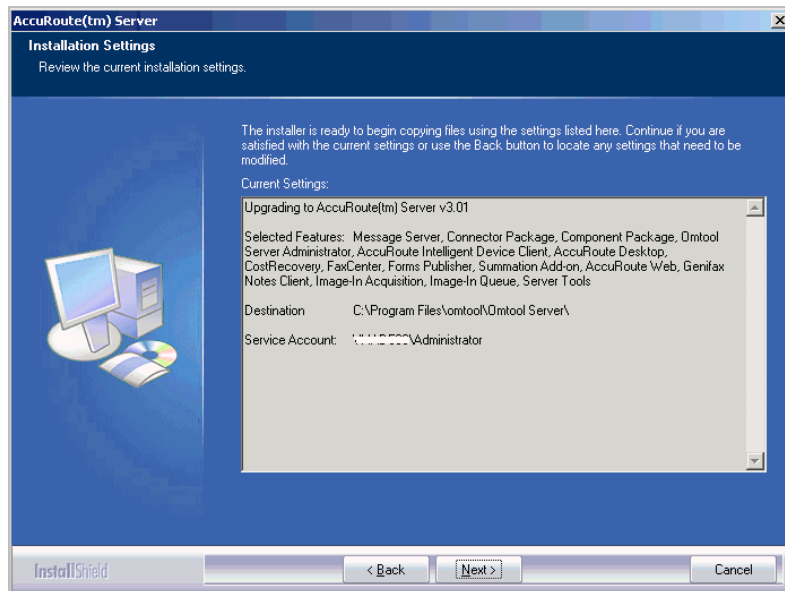
- 6 Review the results and click **NEXT**.

The setup requests logon credentials for the Omtool service account.



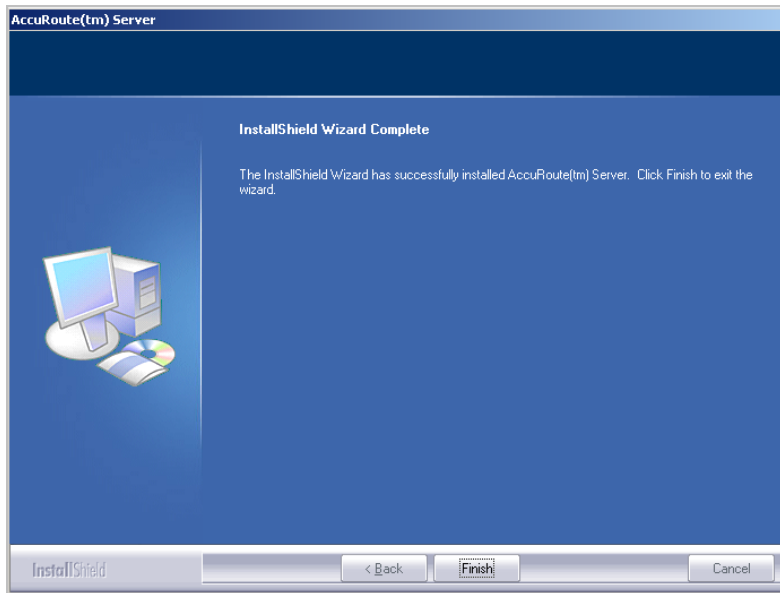
- 7 Provide the logon credentials of the Omtool service account:
 - ▶ In the **NT Domain** text box, enter the domain name.
 - ▶ In the **User Name** text box, enter the user name.
 - ▶ In the **Password** and **Confirm Password** text boxes, enter the password for the user.
- 8 Click **NEXT**.

The ready to install page opens listing all the installation settings.



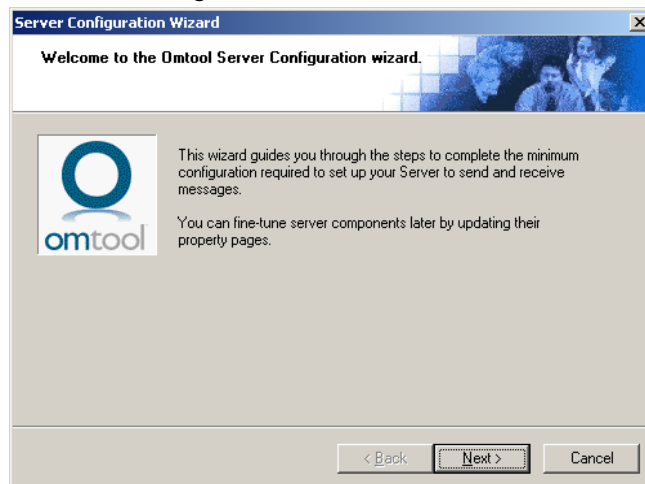
- 9 Review the installation settings. Click **NEXT** to begin the server upgrade.

The InstallShield Wizard upgrades the server. When upgrade is complete, you see the **InstallShield Wizard Complete** page.

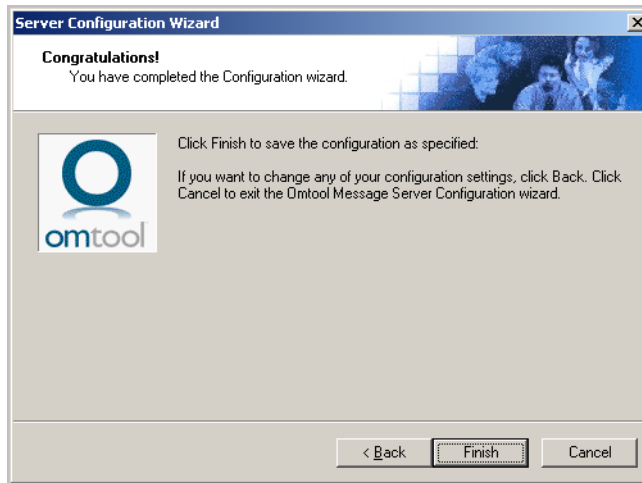


- 10 Click **FINISH** to close the InstallShield wizard.

The Server Configuration Wizard launches and shows the **Welcome** page.



- 11 Click **NEXT**. You are prompted to save the changes you made to the server configuration.



- 12 Click **FINISH**.
The server configuration wizard saves your changes to the server configuration. The **Omtool Server Administrator** starts automatically.
- 13 Check the version of the server. The version should be **v3.01**.

Upgrading Remote Administrators, Composers, AccuRoute Connectors for DMS Libraries, Embedded Directive Managers and Modem Servers

Before you upgrade your Remote Administrator, Composer, AccuRoute Connector for DMS Libraries, Embedded Directive Manager or Modem Server, configure the appropriate Distributed COM permissions for the service account on the system where the remote component is installed. For instructions, see [Assigning distributed COM permissions](#) (2-5).

To upgrade Remote Administrators, Components, Connectors or Modem Servers:

- 1 Login to the system where you are performing the upgrade.
- 2 Open Windows Explorer and navigate to the folder where you saved the upgrade download.

Note The folder where you saved the download must be shared so that the setup files are accessible from remote systems.

- 3 Run **SETUP.EXE**. The InstallShield Wizard shows the **WELCOME** message.

- 4 Click **NEXT**. The **License Agreement** page opens.
- 5 Read the license agreement and click the button beside the **I ACCEPT THE TERMS OF THE LICENSE AGREEMENT** option. Click **NEXT**. The **Omtool Server User** page opens.
- 6 Enter the following information:
 - ▶ In the **NT Domain** text box, enter the domain name.
 - ▶ In the **User Name** text box, enter the user name.
 - ▶ In the **Password** and **Confirm Password** text boxes, enter the password.

Note The logon credentials you specify here must be same as that used on the AccuRoute Server from where the components are called from.

- 7 Click **NEXT**. The **Installation settings** page opens.
- 8 Review the installation settings. Click **NEXT** to begin remote component upgrade.
The InstallShield Wizard upgrades the remote component. When upgrade is complete, you see the **InstallShield Wizard Complete** screen.
- 9 Click **FINISH**.
- 10 Restart your computer.

Important If you upgraded a Remote Administrator, proceed to [Connecting a Remote Administrator to the server](#).

Connecting a Remote Administrator to the server

The Administrator supports any combination of AccuRoute Servers.

To launch the Administrator and connect to a server:

- 1 Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**. The Specify Omtool Message Server page opens.
- 2 Enter the name or IP address of the AccuRoute Server in the **Network Address** text box.
- 3 Click **FINISH**.

Important If you have more than one server in your environment, type the name of any server in the Network Address text box—you can connect to additional servers once the Administrator starts.

The **Omtool Server Administrator** starts. If you want to connect to another server:

- 1 Right-click the **Omtool Server Administrator** in the console tree. Select **CONNECT**. The **Specify Omtool Message Server** page opens.
- 2 Enter the name or IP address of the AccuRoute Server in the **Network Address** text box.
- 3 Click **FINISH**.

The server appears in the console tree under Omtool Server Administrator.

Configuring the client install directory share

After you have finished upgrading the AccuRoute Server, you must configure the **Clients** folder within the Omtool directory located in the Program Files folder. This is necessary because systems which will install the AccuRoute Desktop and other clients remotely must have access to this folder containing the setup files.

Note If you had a shared folder prior to the upgrade, share permissions for everyone except for the user account used is lost during the upgrade. To configure share permissions for everyone and not just the user account used during upgrade, complete the procedure below.

To configure sharing:

- 1 Navigate to **\\OMTOOL\OMTOOL SERVER\CLIENTS** directory (when upgrading from AccuRoute v2.3).
- 2 Right click **CLIENTS** and select **SHARING AND SECURITY** from the drop down menu.
- 3 Select **SHARE THIS FOLDER** option.
- 4 Select **PERMISSIONS** and verify that user **Everyone** is listed with read access.
- 5 Click **OK** then **APPLY** to save your changes.

Section 4: Required tasks after upgrading

This section includes:

- [Copying templates to the server](#) (4-1)
- [Resending cancelled messages](#) (4-1)
- [Providing a logon account for the cleanup task](#) (4-2)
- [Other configurations](#) (4-2)

Copying templates to the server

Before running the server upgrade, you made a backup copy of the Templates directory and the EmbeddedDirectives directory. See [Backing up the templates](#) for more information.

Copy these directories to the following location on the AccuRoute Server.

\\OMTOOL\OMTOOL SERVER\LANGUAGES\ENU

Resending cancelled messages

Before running the server upgrade, you cancelled all messages in the **In Process** queue. For more information, see [Cancelling messages in the In Process Queue](#).

Resend the messages you cancelled using the procedure below.

To resend messages that you cancelled:

- 1 Start the Omtool Server Administrator.
- 2 Expand **MESSAGES** in the console tree. Click **HISTORY**.
- 3 Click the radio button below the **CANCELLED** barometer.
- 4 Go to the details pane and select **ALL ITEMS IN THE VIEW** menu.
- 5 Select all items in the list, right-click and select **RESEND**.
- 6 Click **OK** to resend these messages.

Providing a logon account for the cleanup task

Before running the server upgrade, you had disabled the cleanup task so that it cannot run during the server upgrade. For more information, see [Disabling the cleanup task](#).

Enable the cleanup function by providing the logon credentials for the task. Because the cleanup task modifies the AccuRoute database, it requires the same logon credentials as the server account.

To provide the logon account for the cleanup task:

- 1 Start the Omtool Server Administrator.
- 2 Click and expand **COMPONENTS** in the console tree.
- 3 Double click **MAINTENANCE** in the details pane.
- 4 Click **ADVANCED**. The **Maintenance Advanced Properties** page opens.
- 5 Click **SCHEDULE**. The **Enter Account Information** page opens.
- 6 In the **Username** textbox, enter the user name. In the **Password** and **Confirm password** text boxes, enter the password.
- 7 Click **OK**, **OK** and **OK** to save your changes.

Other configurations

After upgrading AccuRoute v3.01, you must configure the connectors and components in your environment as necessary. For example, if you are using a remote Modem Server, you must redetect telco channels after the upgrade. Depending on your environment and needs, you may need to perform all or none of the configurations listed below.

Enabling Notes after upgrade

If you are using AccuRoute Connector for IBM® Lotus® Notes in your environment, you have to manually enable Notes after the upgrade is complete. To enable Notes, you must manually register the connector executable and then enable AccuRoute Connector for Lotus Notes.

To manually register the Notes executable:

- 1 Login to the system running AccuRoute Server using an account that belongs to the local Administrator group.
- 2 Open a command prompt.
- 3 Enter the following command:

```
"C:\Program Files\Omtool\Omtool Server\bin\OmConGFNotesU.exe" - regserver
```

where C: is the drive where the AccuRoute Server is installed.

- 4 Press **ENTER**.
- 5 Open the Omtool Server Administrator and enable AccuRoute Connector for Lotus Notes.

Modifying AccuRoute Server configuration after upgrade

After you upgrade your legacy AccuRoute Server, if you modify the server configuration, your actions will not remove the associated program files nor does it stop and remove associated services. For example, if you uninstall the Modem Server after an upgrade, it does not remove associated program files or stop/remove modem services. They will remain until a complete uninstallation is done.

Modifying AccuRoute Connector for SMTP after upgrade

After you upgrade to AccuRoute v3.01, if you delete the old AccuRoute Connector for SMTP and then add a new AccuRoute Connector for SMTP, new outbound rules related to the connector are created.

Reconfiguring AccuRoute Connector for LexisNexis Concordance

If you are using AccuRoute Connector for LexisNexis Concordance in your environment, you must reconfigure the connector after the upgrade. This is necessary since AccuRoute Connector for LexisNexis Concordance contains a different configuration and implementation which requires the connector to be reconfigured.

You must note the configuration details before the upgrade and use that data to reconfigure the connector. See [Reviewing configuration data of AccuRoute Connector for LexisNexis® Concordance®](#) for details.

Note	If you are using AccuRoute Connector FTI Ringtail, no configuration is needed after the upgrade. For AccuRoute Connector for CT Summation, there is no automatic upgrade for the old connector. After the upgrade, you must manually remove the old connector and create a new connector with the old configuration details.
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Reconfiguring conversion engine selection

After upgrading from a legacy AccuRoute Server system to AccuRoute v3.01, you must reconfigure the conversion engines selected for a particular file type. This is because, modified selections are not retained during the upgrade process.

For example, if you selected Word Automation as the conversion engine for DOC files, after upgrading the conversion engine for DOC files is changed to Cimmetry (PDF). Therefore, you may have to reconfigure the default compose engines. For information on how to configure conversion engine for file types, consult the [Omtool Server Administrator help](#).

Redetecting Telco channels

After upgrading from a legacy AccuRoute Server system to AccuRoute v3.01, redetect the Telco channels in order to reconfigure them. This is because all channel configurations are lost during the upgrade. For information on how to detect channels, consult the [Omtool Server Administrator help](#).

Section 5: Additional configuration

This section includes:

[Updating Fax board drivers \(for servers with fax capability\)](#) (5-1)

[Downloading latest Brooktrout drivers](#) (5-4)

[Installing Brooktrout v6.1.0 x64 drivers](#) (5-5)

[Configuring Brooktrout SRI40](#) (5-6)

Updating Fax board drivers (for servers with fax capability)

The upgrade supports all new fax board drivers / modules for all supported fax boards including Brooktrout Technology SRI40, TR1034 series, and TruFax RoHS series.

Note It is recommended that you update the drivers for your fax boards. If an Omttool Technical Support representative instructs you to update your drivers, use the procedures in this section to remove the drivers and then install new drivers.

Important Non RoHS TruFax boards are not supported in AccuRoute v2.3 or AccuRoute v3.01.

Removing version 5.x.x SDK drivers

Note After you remove an older version of fax board driver, you must always disable the Modem Manager service and reboot your system. After that you should follow the instructions to install the latest Brooktrout driver.

To remove version 5.x.x SDK drivers used in (SR 140, TR 1034, RoHS TruFax boards)

- 1 Stop the **Omttool Modem Manager** service using the Services applet.
- 2 Disable the **Omttool Modem Manager** service using the Services application.
- 3 Remove the Brooktrout drivers using the **Add/Remove Programs** applet in the Control Panel.

Note Note: Depending on the 5.x.x version you are removing the Driver name in the add/remove programs applet can be:
 Brooktrout Boston SDK
 Brooktrout System Software
 Cantata Brooktrout System Software
 Dialogic Brooktrout System Software

- 4 Reboot the system before installing the new drivers.

Removing version 4.7 SDK drivers

Note After you remove an older version of fax board driver, you must always disable the Modem Manager service and reboot your system. After that you should follow the instructions to install the latest Brooktrout driver.

The process of removing Boston v4.7 drivers (used with TR1034 series boards) has several steps:

- remove the drivers using the Add/Remove Programs applet
- • remove the device from the Device Manager in Windows
- • delete the INF and PNF Brooktrout data files in the **\WINNT\inf** directory
- • delete the \Boston directory

To remove the drivers using the Add\Remove Programs applet:

- 1 Stop the **Omtool Modem Manager** service using the Services applet.
- 2 Disable the **Omtool Modem Manager** service using the Services application.
- 3 Start the **Add/Remove Programs** applet in the Control Panel.
- 4 Locate **BROOKTROUT TRXSTREAM DRIVERS** and remove this item. (For more information on using the Add/Remove Programs applet, consult Windows help.)
- 5 Reboot the system before installing the new drivers.

To remove the device from the Device Manager:

- 1 Right-click the server on the desktop and click **MANAGE**. The **Component Management** applet starts.
- 2 Expand **System Tools** and select **DEVICE MANAGER** in the console tree.
- 3 Expand the computer name in the details pane if necessary to view the devices installed on the server, and expand **BROOKTROUT HARDWARE**.
- 4 Right click **TRxStream Board** and select **UNINSTALL**.
- 5 Click **OK** on the **Confirm Device Removal** message to proceed with the uninstall.

To delete the INF and PNF Brooktrout data files in the \WINNT directory:

Important This procedure instructs you to delete a pair of INF and PNF files. Follow the procedure carefully and do not delete any other files on the system with similar filenames.

- 1 Navigate to the **C:\WINNT\INF** directory.
- 2 Right click the **\INF** directory and select **SEARCH**. Enter **BROOKTROUT** in the **Containing text** box and click **SEARCH NOW**.
- 3 Sort the files by name and locate the **oem#.inf** and **oem#.pnf** files. (The symbol # represents a number. For example, if this number is 6 on your system, the filenames should be oem6.inf and oem6.pnf.)
- 4 Verify that the two files have the same name but different extensions, and are located in the **\WINNT\INF** directory.
- 5 Delete the files.

To delete the \Boston directory:

- 1 Navigate to the **\Boston** directory on the modem server. (Search for the directory if necessary.)
- 2 Delete the directory.

Removing version 4.6 SDK drivers

Note After you remove an older version of fax board driver, you must always disable the Modem Manager service and reboot your system. After that you should follow the instructions to install the latest Brooktrout driver.

To remove version 4.6 drivers (used with TRI034 series boards):

- 1 Stop the **Omtool Modem Manager** service using the Services applet.
- 2 Disable the **Omtool Modem Manager** service using the Services application.
- 3 Open a Windows command prompt.
- 4 Enter **CD \BOSTON\INSTALL** and press **ENTER**.
- 5 Enter **NET STOP BOSTON** and press **ENTER**.
- 6 Enter **INSTALL -R** and press **ENTER**.
- 7 Close the Command Prompt window.
- 8 Remove the fax board drivers using the **Add/Remove Programs** applet in the Control Panel.
- 9 Reboot the system before installing the new drivers.

Removing version 4.3 SDK drivers

Note After you remove an older version of fax board driver, you must always disable the Modem Manager service and reboot your system. After that you should follow the instructions to install the latest Brooktrout driver.

To remove version 4.3 drivers (used with TruFax series boards):

- 1 Stop the **Omttool Modem Manager** service using the Services applet.
- 2 Disable the **Omttool Modem Manager** service using the Services application.
- 3 Open a Windows command prompt.
- 4 Enter **CD \BFAX\INSTALL** and press **ENTER**.
- 5 Enter **NET STOP BFAX** and press **ENTER**.
- 6 If you have a **TI** line with **ISDN** support, remove the **BTNA** service:
 - ▶ Type **CD.. \SERVER** and press **ENTER**.
 - ▶ Type **BTNASRV -REMOVE** and press **ENTER**.
- 7 Close the command prompt window.
- 8 Remove fax board drivers using the **Add/Remove Programs** applet in the Control Panel.
- 9 Reboot the system before installing the new drivers.
- 10 Enter **INSTALL -R** and press **ENTER**.
- 11 Close the Command Prompt window.
- 12 Remove the fax board drivers using the **Add/Remove Programs** applet in the Control Panel.
- 13 Reboot the system before installing the new drivers.

Downloading latest Brooktrout drivers

To download Brooktrout v6.1.0 x64 drivers:

- 1 Go to <http://www.omttool.com/support> and log in using your customer number.
- 2 Click **DOWNLOADS AND DOCS** in the navigation pane on the left. (It is located under **Support**.)
- 3 Open the **AccuRoute** menu, go to **Drivers** section. Locate the download.
- 4 Click the download link to begin download.
The zip file containing the .msi file and the Release Notes opens.
- 5 Select the files and click **EXTRACT**. Browse to the location where you want to save the file.
- 6 Click **EXTRACT**. The files are extracted and saved to the location you specified.

- 7 Name this directory the **Boston** directory.

Installing Brooktrout v6.1.0 x64 drivers

To install Brooktrout v6.1.0 x64 drivers:

- 1 Locate the Boston directory.
- 2 Double-click [Brooktrout 6.1.0_x64.msi](#). The **Welcome** page opens.
- 3 Click **NEXT**. The **License Agreement** page opens.
- 4 Read the license agreement and select **I accept the terms in the license agreement** option.
- 5 Click **NEXT**. The **Destination Folder** page opens.
- 6 Modify the destination location if necessary and click **NEXT**.
- 7 Click **NEXT** to begin the installation.
- 8 When installation is complete, you see the **InstallShield Wizard Completed** page.
- 9 Click **FINISH**. The Readme opens.

Activating the License

Note The following procedure is applicable for SRI40 modules only.

To activate the license

- 1 Click **START >PROGRAM FILES > BROOKTROUT LICENSE MANAGER**.
The **BrookTrout License Manager** opens.
- 2 In the menu bar click **LICENSE >ACTIVATE LICENSE**. The License Activation wizard opens and you see the **Welcome** message.
- 3 Click **NEXT**. Select **Using the interactive web method**.
- 4 Click **NEXT**. You get the **Node Lock** value.
- 5 Click **Save the instructions into a file** option.
- 6 Click **NEXT**.
- 7 Browse and save the file to a known location.
- 8 Go to the location where you saved the file. Open the file.
The file contains the text similar to what is shown below and gives you the Node Lock value of your system:

To request a license, please visit our website:
<http://www.dialogic.com/activation>
and follow the instructions provided on the website.
Dialogic will email the license to you immediately.

When prompted, supply the following information:

Node Lock: [Node Lock value]

- 9 Open Internet Explorer and go to <http://www.dialogic.com/activation>.
- 10 In the **LICENSE KEY** text box, enter the License key and the Node Lock value of your system.

Important For the license key, contact Brooktrout customer support.

Brooktrout sends you the license for your BrookTrout SR140 module.

Note This license key will enable the Brooktrout SR140 fax feature on the system the node value was retrieved from. It cannot be transferred without assistance from Cantata.

- 11 Save the license file to the local drive of the system.

Applying the license

Note The following procedure is applicable for SR140 modules only.

To apply the license

- 1 Launch the **Brooktrout License Manager**.
- 2 From the file menu option, select **LICENSE**.
- 3 Select **INSTALL LICENSE** drop down.
- 4 Browse to the license file you saved to the system.

Configuring Brooktrout SR140

For configuration instructions, see section 4 of the [The modem driver installation and configuration guide](#).

Section 6: Upgrading client applications

This section includes:

- [Client requirements](#) (6-1)
- [AccuRoute Web Client](#) (6-2)
- [Cost Recovery client](#) (6-3)
- [FaxCenter client](#) (6-4)
- [AccuRoute Desktop client](#) (6-5)
- [Image-In Queue client](#) (6-6)

All client installation setup files are located in the Clients directory of the AccuRoute Server. Before rolling out the client upgrade, you can share this Clients directory so that it is easily accessible from remote systems where the clients are installed. For instructions on how to share the Clients directory containing the setup files, see [Configuring the client install directory share](#) (3-8).

Client requirements

The system where you install/upgrade AccuRoute clients must meet the following requirements:

- Pentium®-class processor
- Windows 2008/2003 SP2/ XP Professional/Vista
- 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 the client 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.

AccuRoute Web Client

When you upgrade your AccuRoute Server, upgrade all instances of the AccuRoute Web Client in your environment. For more information, consult the [Install Guide](#) and the [User Guide](#).

Note about Omtool Web Client

Omtool Web Client was deprecated in AccuRoute v2.3. It was replaced by AccuRoute Web Client v2.0. Omtool recommends that when you upgrade to AccuRoute Server v3.01, you install and configure the AccuRoute Web Client v3.01.

Important If you have a prior version of Omtool Web Client, do not uninstall or remove the deprecated Omtool Web Client application and set up files in your system as deleting those files may interfere with the server usage.

Note You cannot configure the AccuRoute Server to use both the deprecated Omtool Web Client and the new AccuRoute Web Client at the same time.

To upgrade Accuroute Web Client:

- 1 Click **START > CONTROL PANEL > ADD/REMOVE PROGRAMS**. Remove the existing version of AccuRoute Web Client from the system using the Add/Remove Programs applet.
- 2 Open Windows Explorer. Navigate to **\\SERVERNAME\CLIENTS\ACCUROUTEWEB**.
where **Clients** is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.
- 3 Run **SETUP.EXE**.
The InstallShield Wizard configures the system for the AccuRoute Web Client and shows the **Welcome** message.
- 4 Click **NEXT**. The **Destination Folder** page opens.
- 5 Click **NEXT** to accept the default destination location. Alternately, to install the application in a different location, click **BROWSE**. Navigate to the desired directory. Click **OK**, then **NEXT**.
The **IIS Virtual Directory** page opens.
- 6 In the **ENTER IIS VIRTUAL DIRECTORY NAME** text box, enter the virtual directory name or accept the default **OMTOOLARWEB**.
- 7 Click **NEXT**. The **AccuRoute Server** page opens.
- 8 In the **ENTER ACCURROUTE SERVER** name text box, enter the AccuRoute Server to connect to.

- 9 Click **NEXT**. The **AUTHENTICATION TYPE** page opens.
- 10 Choose the authentication type, the default is Active Directory.
- 11 In the **AUTHENTICATION SERVER NAME** textbox, enter the name of the server running **Exchange** or **Notes** depending on your selection in step 10.
- 12 Click **NEXT**. The **Ready to Install the Program** page opens.
- 13 Review the installation settings. Click **INSTALL** to install AccuRoute Web Client.
- 14 When the installation is complete, the **InstallShield Wizard Complete** page opens.
- 15 Click **FINISH**.
- 16 Check the version of the client to make sure that the upgrade was successful. The version should be v3.01.

Cost Recovery client

When you upgrade your AccuRoute Server, upgrade all instances of the CostRecovery client in your environment. For more information on the CostRecovery application, consult the [CostRecovery Administrator Guide](#).

To upgrade CostRecovery:

- 1 Click **START > CONTROL PANEL > ADD/REMOVE PROGRAMS**. Remove the existing version of CostRecovery from the system using the Add/Remove Programs applet.
- 2 Open Windows Explorer. Navigate to **\\SERVERNAME\CLIENTS\COSTRECOVERY**.
where **clients** is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.
- 3 Run **SETUP.EXE**.
The InstallShield Wizard configures the system for the CostRecovery client and shows the **Welcome** message.
- 4 Click **NEXT**. The **License Agreement** page opens.
- 5 Read the license agreement. Click **YES**. The **Choose Destination Location** page opens.
- 6 Click **NEXT** to accept the default destination location. Alternately, to install the application in a different location, click **BROWSE**. Navigate to the desired directory. Click **OK**, then **NEXT**.
The **Genifax Server** page opens.
- 7 In the **GENIFAX SERVER** text box, enter the name or the IP address of the system running the AccuRoute Server.
- 8 Click **NEXT**. The **Start Copying Files** page opens.
- 9 Review the installation settings. Click **NEXT** to install CostRecovery client.
- 10 When the installation is complete, the **InstallShield Wizard Complete** page opens.

11 Click **FINISH**.

Important Recreate the export template file before running CostRecovery. Additionally, enable the Billing component on the AccuRoute Server and configure it to collect the information you need. For more information, refer to the Administrator help.

Recreate also older custom configurations in the new Cost Recovery client using the backup files. For more information, see [Backing up Cost Recovery custom configurations \(2-9\)](#).

12 Check the version of the client to make sure that the upgrade was successful. The version should be v3.2.0.1014.

FaxCenter client

When you upgrade your AccuRoute Server, upgrade all instances of the FaxCenter client in your environment. For more information on the FaxCenter application, consult the [FaxCenter Online Help](#).

To upgrade FaxCenter:

- 1 Click **START > CONTROL PANEL > ADD/REMOVE PROGRAMS**. Remove the existing version of FaxCenter from the system using the Add/Remove Programs applet.
- 2 Open Windows Explorer. Navigate to `\\SERVERNAME\CLIENTS\FAXCENTER`, where `Clients` is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.
- 3 Run **SETUP.EXE**.
The InstallShield Wizard configures the system for the FaxCenter client and shows the **Welcome** message.
- 4 Click **NEXT**. The **License Agreement** page opens.
- 5 Read the license agreement. Click **YES**. The **Choose Destination Location** page opens.
- 6 Click **NEXT** to accept the default destination location. Alternately, to install the application in a different location, click **BROWSE**. Navigate to the desired directory. Click **OK**, then **NEXT**.
The **Start Copying Files** page opens.
- 7 Review the installation settings. Click **NEXT** to install FaxCenter client.
- 8 When installation is complete, the **InstallShield Wizard Complete** page opens.
- 9 Click **FINISH**.

- 10 Check the version of the client to make sure that the upgrade was successful. The version should be v3.6.

AccuRoute Desktop client

The following versions of the AccuRoute Desktop are qualified with AccuRoute v3.01.

- AccuRoute v3.01 (ships with AccuRoute v3.01)
- AccuRoute v2.2.3 (ships with AccuRoute v2.3)

Note While the legacy AccuRoute Desktops are supported, Omtool recommends that you upgrade to the latest version of AccuRoute Desktop client to take advantage of the latest features. AccuRoute Desktop clients prior to v2.2 are not supported.

For more information on the AccuRoute Desktop client, consult the [Install Guide](#) and the [User Guide](#).

To upgrade AccuRoute Desktop client:

- 1 Login to the system where you have the client using an account that belongs to the local Administrators group.
- 2 Open Windows Explorer. Navigate to `\\SERVERNAME\CLIENTS\ACCUROUTEDESKTOP`, where `Clients` is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.
- 3 Run **SETUP.EXE**.
The InstallShield Wizard configures the system and shows the **Welcome** message.
- 4 Click **NEXT**. The **License Agreement** page opens.
- 5 Read the license agreement. Select the **I ACCEPT THE TERMS IN THE LICENSE AGREEMENT** option and click **NEXT**.
The **Destination Folder** page opens.
- 6 Click **NEXT** to accept the default destination location. Alternately, to install the application in a different location, click **BROWSE**. Navigate to the desired directory. Click **OK**, then **NEXT**.
The **Ready to Install** page opens.
- 7 Click **INSTALL** to begin the installation.
When installation is complete, the **InstallShield Wizard Complete** page opens.
- 8 Click **FINISH**.

- 9 Check the version of the client to make sure that the upgrade was successful. The version should be v3.01

Image-In Queue client

When you upgrade your AccuRoute Server, upgrade all instances of the Image-In Queue client in your environment. For more information on the Image-In Queue client, consult the [Install Guide](#) and the [User Guide](#).

To upgrade Image-In Queue client:

- 1 Login to the system where you have the client using an account that belongs to the local Administrators group.
- 2 Open Windows Explorer. Navigate to **\\SERVERNAME\CLIENTS\IMAGE-IN QUEUE**.
where **Clients** is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.
- 3 Run **SETUP.EXE**.
The InstallShield Wizard configures the system and shows the **Welcome** message.
- 4 Click **NEXT**. The setup shows the license agreement.
- 5 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**.
- 6 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**.
- 7 Click **NEXT** to begin the installation. When installation is complete, you see the **InstallShield Wizard Complete** message.
- 8 Click **FINISH** to close the wizard.
- 9 Check the version of the client to make sure that the upgrade was successful. The version should be v3.01

Section 7: Troubleshooting

This section includes:

[Preview and Approval links from AccuRoute Web Client v1.0 become unusable after upgrading](#) (7-1)

Preview and Approval links from AccuRoute Web Client v1.0 become unusable after upgrading

Problem:

I upgraded from AccuRoute Web Client v1.0 to v2.0 (or later version). Approval and Preview links from v1.0 are now unusable.

Solution:

After you upgrade from an older Web Client (AccuRoute Web Client v1.0), the older web client is uninstalled. As a result, there is no control on the process of redirection. Use the sample [ASP file](#) below to redirect the old Web Client requests to new Web Client location.

Note For this workaround to be effective, verify the job id is the same in the old AccuRoute Server and the upgraded new AccuRoute Server. If the old url has jobid=40 and new url has jobid=65 after the upgrade, this workaround will not work.

To redirect links:

- 1 Create a virtual directory in IIS with old web client name which is **OMTOOL**.
For instructions on how to create a virtual directory in IIS, see <http://support.microsoft.com/kb/172138>.
- 2 If old web client name was **GENIFAXWEB** then create the virtual directory with that name.
- 3 Place the [ASP file](#) inside that virtual directory.

Note By default the new web client virtual directory name is "OmtoolArWeb", if it is something different then edit the code below to change it (`sDestinationVirtualDirectory`).

This assumes the new and old web client are on same server, if not change the server name. This page will redirect old web client "approval" & "review" requests to new web client.

ASP file

```
<%@ Language=VBScript %>
```

```
<%  
    ' What this page does  
    '  
    ' This page allows the user to redirect the request from Old web client  
    to New web client  
    '  
    ' How to install and use it  
    '  
    ' 1) Create a virtual directory on IIS with old web client name which is  
    "omtool"  
    ' 2) If old web client name was "GenifaxWeb" then create the virtual  
    directory with that name  
    ' 3) Place this file inside that virtual directory  
    ' 4) By default the new web client virtual directory name is "OmtoolArWeb",  
    if it is something  
    '    different then edit the code below to change it  
    (sDestinationVirtualDirectory)  
    ' 5) This assumes the new and old web client are on same server, if not  
    change the (sServerName)  
    ' 6) This page will redirect old web client "approval" & "review" requests  
    to new web client.  
  
    dim sUrl  
    dim sDestinationUrl  
    dim sServerName  
    dim sDestinationVirtualDirectory  
  
    sServerName = Request.ServerVariables("SERVER_NAME")  
    sDestinationVirtualDirectory = "OmtoolArWeb"  
    sDestinationUrl = "http://" & sServerName & "/" &  
    sDestinationVirtualDirectory & "/omreviewfax.aspx"  
  
    sUrl = Request.ServerVariables("QUERY_STRING")  
  
    Response.Redirect sDestinationUrl & "?" & sUrl  
  
%>
```


Appendix: Upgrading AccuRoute Servers in a cluster

When upgrading AccuRoute Servers that are part of a server cluster, follow the instructions in this section.

This section includes:

[Upgrading AccuRoute Server cluster](#) (8-1)

[Cancelling out of the server configuration wizard when upgrading the secondary server](#) (8-2)

[Error after upgrading the secondary server](#) (8-2)

[Using AccuRoute Connector for Lotus Notes in a cluster](#) (8-3)

Upgrading AccuRoute Server cluster

To upgrade AccuRoute Servers in a cluster:

- 1 Verify that there are no messages in the In Process queue. If there are, you must cancel the messages using the instructions in [Cancelling messages in the In Process Queue](#) (2-6). You can resend the messages after the upgrade is complete.
- 2 Shutdown the secondary server of the cluster.
- 3 Upgrade the primary server using instructions in [Upgrading the AccuRoute Server](#) (3-1).
- 4 Shutdown the primary server.
- 5 Start the secondary server of the cluster.
- 6 Upgrade the secondary servers of the cluster using instructions in [Upgrading the AccuRoute Server](#) (3-1)

Important At the end of the upgrade on the secondary server, when you see the Server configuration wizard, you must cancel out of the server configuration wizard. For instructions, see [Cancelling out of the server configuration wizard when upgrading the secondary server](#) (8-2)

If you see an error message “Failed to connect to the server ...”, troubleshoot the situation using instructions in [Error after upgrading the secondary server](#), 8-2)

- 7 Start the primary server.

Cancelling out of the server configuration wizard when upgrading the secondary server

To cancel out of the server configuration wizard:

- 1 Click **CANCEL** in the Server Configuration wizard welcome page.



- 2 You are prompted to confirm that you want to cancel out of the configuration.



- 3 Click **YES**. The following dialog opens asking you if you want to configure the system the next time you start the Administrator.



- 4 Click **NO**.

Error after upgrading the secondary server

After you upgrade the secondary server, if the server configuration wizard fails to open and you see the error message: “Failed to connect to server. The service cannot be started, either because it is disabled or because it has no enabled devices associated with it”

follow the steps below to restart the services and complete the cluster upgrade.

- 1 In the message “Failed to connect to ...” click **OK**.
You see the Specify Omtool Message server dialog. The server name is pre-populated with the name of the secondary server you upgraded.
- 2 Click **FINISH**. You see the message “Failed to connect to ...” again.
- 3 Repeat steps 1 and 2.
All services are started and the cluster upgrade is successful.

Using AccuRoute Connector for Lotus Notes in a cluster

If you are using AccuRoute Connector for Lotus Notes in a cluster environment, enable Notes either in the primary and the secondary server after the upgrade is complete. To enable Notes, you must manually register the connector executable in both the primary and secondary server and then enable AccuRoute Connector for Lotus Notes.

To manually register the Notes executable in both the primary and secondary server:

- 1 Login to the system running AccuRoute Server using an account that belongs to the Administrator.
- 2 Open a command prompt.
- 3 Enter the following command:

```
"C:\Program Files\Omtool\Omtool Server\bin\OmConGFNotesU.exe" -  
regserver
```

where C: is the drive the Omtool Server has been installed on.
- 4 Press **ENTER**.
- 5 Open the Omtool Server Administrator and enable AccuRoute Connector for Lotus Notes.

Appendix: Upgrading AccuRoute Servers in a cluster