Embedded AccuRoute for HP Chai v1.3 installation and integration guide

March 16, 2009

omtool™

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Contents

Section 1: Introduction

This guide contains instructions on deploying Embedded AccuRoute for HP Chai to multifunction devices in a LAN. It is written for systems administrators with detailed knowledge of the Omtool server and the device.

This section includes:

Embedded AccuRoute for HP Chai

Embedded AccuRoute for HP Chai brings the versatile document routing capabilities of AccuRoute to supported HP devices. These capabilities are founded on Omtool's Embedded Directive technology.

Embedded AccuRoute for HP Chai runs as a Java chailet called the Omtool chailet. In the main menu, the Chailet presents the device user with several AccuRoute scanning features.

Figure 1-A: **AccuRoute scanning features on the HP device**
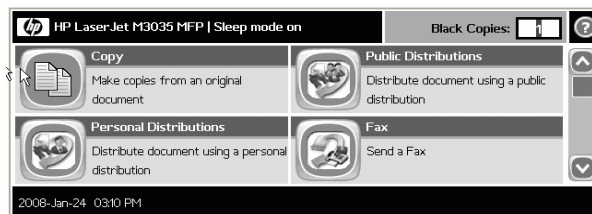
The display panel on the HP device shows AccuRoute scanning features.

Each feature has a unique function that is detailed in the following table. (To see how each feature works on the device, go to Section 7: Testing. This section shows a complete screen sequence for each feature.)

Table 1-A: **AccuRoute scanning features in Embedded AccuRoute for HP Chai**

Feature	Description	Login required	Notes
Public Distributions	The user selects Public Distributions and then selects a public distribution option, or Embedded Directive. The device scans the document and it is distributed using the selected public distribution option.	No	Public distribution options are associated with a special user account that is set up for this purpose.
Personal Distributions	The user selects Personal Distributions, logs in to the device, and selects a personal distribution option, or Embedded Directive. The device scans the document and it is distributed using the selected personal distribution option.	Yes	
MyAccuRoute	The user selects MyAccuRoute and logs in to the device. The device scans the document and it is distributed using the My AccuRoute preferences of the user.	Yes	MyAccuRoute is an advanced feature of AccuRoute Desktop. It enables the server to process all AccuRoute messages from the same user with the same Embedded Directive. For more information on this feature, consult the AccuRoute Desktop installation guide. Go to Related documentation on 1-8.
MyAccuRoute with Scan More	This special MyAccuRoute option accommodates users who scan multi-page documents from the exposure glass or scan documents that are larger than the capacity of the automatic document feeder.		
Routing Sheet	The user selects Routing Sheet. The device scans the document and it is distributed using the Embedded Directive that was used to create the AccuRoute Routing Sheet.	No	
Routing Sheet with Scan More	This special Routing Sheet option accommodates users who scan multi-page documents from the exposure glass or scan documents that are larger than the capacity of the automatic document feeder.		
Scan to Folder	The user selects Scan to Folder. The device scans the document and it is saved to a network folder.	No	
Scan to Folder with Scan More	This special Scan to Folder option accommodates users who scan multi-page documents from the exposure glass or scan documents that are larger than the capacity of the automatic document feeder.		
Fax	This option allows the user to do a walk-up fax. The user enters the fax number and can additionally add a cover page to fax. The device scans the document and faxes it to the number specified.	No	

Main components of the environment

The Embedded AccuRoute for HP Chai environment requires the Omtool server, the web server, and the device.

- **AccuRoute server** - AccuRoute v2.1 or higher

    For information on installing AccuRoute, consult the server installation guides. Downloads are available on the Omtool web site.

- **Web server** - The following must be installed:

    ‣ **Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension)** - For information on installing this application, consult the Embedded AccuRoute for Intelligent Devices installation guide. See Related documentation (1-8)

    Note   AccuRoute v2.2/v2.3 installs the AccuRoute Intelligent Device Client v2.1.1 as part of the server install. If you are using AccuRoute v2.2, no separate AccuRoute Intelligent Device Client install is required.

    ‣ **Embedded AccuRoute for HP Chai** - The instructions for installing Embedded AccuRoute for HP Chai are in this guide.

    Note   The same system can be used as the Omtool server and the web server.

- **Device** - The following must be installed:

    ‣ **Supported firmware** - Go to Supported devices on 2-1.

    ‣ **Chailet** - The instructions for uploading the Omtool chailet from the web server to the device are in this guide.

Document workflows

The workflow that moves a document from the device to its final destination involves the user, the Chailet, Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension), and the Omtool server. An understanding of this workflow can be helpful in troubleshooting an Embedded AccuRoute integration.

In its most basic workflow, the Chailet saves files to a directory on the web server, and Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) submits the files directly to the Omtool server. This workflow applies to the features Public Distributions, Routing Sheet, Routing Sheet with Scan More, Scan to Folder, and Scan to Folder with Scan More.

Figure 1-B: **Workflow for Public Distributions, Fax, Routing Sheet, Routing Sheet with Scan More, Scan to Folder, and Scan to Folder with Scan More**
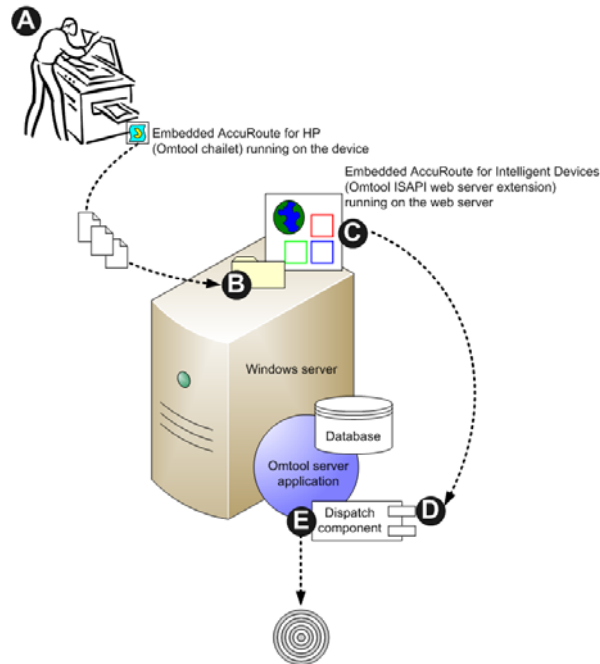
The user selects an AccuRoute scanning feature and scans a document. The Chailet saves the scanned document and copies the file to the web server. Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) submits the file to the Omtool server as a "message". The Dispatch component applies rules to the message, and the Omtool server processes the message accordingly. The Dispatch component routes the message to the outbound connector.

For all other scanning features (Personal Distributions, MyAccuRoute, and MyAccuRoute with Scan More), the Chailet makes requests during the scan session to authenticate users, retrieve Embedded Directives, and/or retrieve the user's MyAccuRoute settings. When the Chailet requires data from the Omtool server, it submits a request to Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) which retrieves the data from the Omtool server and supplies it to the Chailet. As soon as the Chailet has the requested data, the basic workflow resumes.

Figure 1-C: **Workflow for Personal Distributions, MyAccuRoute, and MyAccuRoute with Scan More**
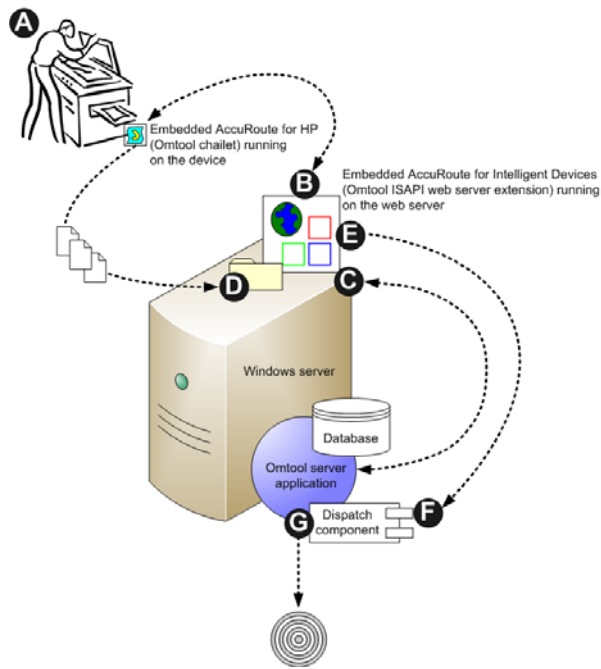
The user selects an AccuRoute scanning feature. The Chailet submits a request to Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) to authenticate the user. Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) requests the authentication data from the Omtool server and returns it to the Chailet. The Chailet saves the scanned document and copies the file to the web server. Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) submits the file to the Omtool server as a "message". The Dispatch component applies rules to the message, and the Omtool server processes the message accordingly. The Dispatch component routes the message to the outbound connector.

Installation components

The Embedded AccuRoute for Chai setup includes multiple components that are detailed in the following table.

Table 1-B: **Description of installation components with locations and functions**

Component	Setup location	Function
Omtool Chailet and AccuRoute HP Chai Device Loader application	…\program files\Omtool\ISAPIClients\HPChai*	These files are copied to the web server during installation (…\Omtool\ISAPIClients\HPChai*). Included are configuration files and JAR files.
Omtool Chailet configuration data	…\OmISAPIHP\Scripts\OmISAPIUHP.xml	This XML file is copied to the web server during installation. If you are using AccuRoute v2.1, it is copied to: C:\Program Files\Common Files\Omtool\WEBAPI\Scripts\ If you are using AccuRoute v2,2 or later, it is copied to: C:\Program Files\Omtool\Omtool Server\WebAPI\OmtoolWebAPI\Scripts The file supplies the Chailet with configuration data. It is configured automatically by the setup. Do not modify this file after installation.

Deployment summary

To deploy Embedded AccuRoute for HP Chai:

1   Complete the installation requirements. ([Section 2: Requirements](#))

2   Install Embedded AccuRoute for HP Chai on the web server. ([Section 3: Installation](#))

3   Upload the Chailet to the device. ([Section 4: Required configuration on the device](#))

4   Configure the Omtool server. ([Section 5: Required configuration on the server](#))

5   Configure optional capabilities. ([Section 6: Optional configuration](#))

6   Test the AccuRoute scanning features on the device. ([Section 7: Testing](#))

7   Troubleshoot the setup if necessary. ([Section 8: Troubleshooting](#))

Custom configuration

By default, Embedded AccuRoute for HP Chai supports one Chailet configuration. You can modify or customize it to support multiple configurations.

Modifying the default configuration

The default configuration is created by the Embedded AccuRoute for Chai setup.

To change the default configuration after Embedded AccuRoute for HP Chai has been deployed, reinstall Embedded AccuRoute for HP Chai:

1   Remove Embedded AccuRoute for HP Chai from the web server. (Go to Uninstalling Embedded AccuRoute for HP Chai from the web server on 3-9.)

2   Run the Embedded AccuRoute for Chai setup again using the desired values. (Go to Section 3: Installation.)

3   Configure the device. (Go to Section 4: Required configuration on the device.)

Customizing Embedded AccuRoute for HP Chai

Embedded AccuRoute for HP Chai can be customized to:

- Run a unique configuration on each device or groups of devices.

- Use custom values for button names and icons, the number of Embedded Directives displayed on the device, and the frequency in which the Chailet resets the display panel and refreshes its configuration from the web server.

- Override native settings on the device.

For information and ideas on how you can customize Embedded AccuRoute for HP Chai, contact Omtool sales.

Related documentation

AccuRoute server documentation

- **AccuRoute v2.3 server installation guide** - http://www.omtool.com/documentation/AccuRoute/v23/Server/AccuRouteV23ServerInstallConfigureGuide.pdf

- **AccuRoute v2.2 server installation guide** - http://www.omtool.com/documentation/accuroute/v22/accurouteserver/accuroutev22serverinstallguideexchange.pdf

For AccuRoute v2.1 server installation, consult the following manuals

- **Omtool server installation guide** - http://www.omtool.com/documentation/omtoolserver/installationguidegf331ar201.pdf

- **AccuRoute v2.1 update readme** - http://www.omtool.com/documentation/readmes/readme_ar21gf34.htm

For information on how to manage your AccuRoute servers, consult the following manual.

- **Administrator help** - http://www.omtool.com/documentation/omtoolserver/v331/admin/

AccuRoute Desktop documentation

- **AccuRoute Desktop installation guide** - http://www.omtool.com/documentation/accuroute/v21/accuroutedesktop/accuroutedesktopinstallationguideV21.pdf

- **AccuRoute Desktop user guide** - http://www.omtool.com/documentation/accuroute/v21/accuroutedesktop/accuroutedesktopuserguidev21.pdf

- **AccuRoute Desktop quick start guide** - http://www.omtool.com/documentation/accuroute/v21/accuroutedesktop/accuroutedesktopquickstartv21.pdf

Web Client documentation

- **AccuRoute Web Client installation guide** (relevant for AccuRoute v2.3 only) **-** http://www.omtool.com/documentation/AccuRoute/v23/AccuRouteWebClient/AccuRouteWebClientV20InstallConfigurationGuide.pdf

- **Omtool Web Client installation guide** - http://www.omtool.com/documentation/omtoolserver/v332/webclient/omtoolwebclientinstallationguide.pdf

Embedded AccuRoute for Intelligent Devices documentation

- **Embedded AccuRoute for Intelligent Devices installation guide** - http://www.omtool.com/documentation/accuroutedeviceintegration/EmbeddedAccuRouteV21InstallGuide.pdf

Embedded AccuRoute for HP Chai documentation

The following quick start guide is designed to be posted near the device, distributed to device users, and published on your organization's intranet: http://www.omtool.com/documentation/accuroutedeviceintegration/hp/ EmbeddedAccuRouteforHPChaiV13QuickStartGuide.pdf

It contains instructions for the following AccuRoute features:

- Using the Public Distributions feature
- Using the Personal Distributions feature
- Using the Fax feature
- Using the MyAccuRoute feature
- Using the MyAccuRoute with Scan More feature
- Using the Routing Sheet feature
- Using the Routing Sheet with Scan More feature
- Using the Scan to Folder feature
- Using the Scan to Folder with Scan More feature

Section 2: Requirements

This section includes:

Supported devices

Omtool qualified Embedded AccuRoute for HP Chai in the following configurations:

- HP Color LaserJet CM4730, HP Digital Sender 9250c

- HP LaserJet M3035, M4345, M5035.

- HP LaserJet 4345mfp series with firmware version 9.051.6

- HP Digital Sender 9200c series with firmware version 9.051.7

- HP Color LaserJet 4730mfp series with firmware version 46.131.7

HP certified the following devices with the HP Chai embedded software platform that supports Embedded AccuRoute for HP Chai:

- **Black and white multifunctions and all-in-ones** - HP LaserJet 9040/9050mfp series, HP LaserJet 9000mfp series, HP LaserJet 4345mfp series, and HP LaserJet 4100mfp series.

- **Color multifunctions and all-in-ones** - HP Color LaserJet 9500mfp series, HP Color LaserJet 4730mfp series, and HP Digital Sender 9200c series.

Note   All LaserJet models listed here are part of the "mfp series". Other LaserJet models that are part of the "printer series" do not have the scanning capabilities required to support Embedded AccuRoute for HP Chai.

Omtool supports Embedded AccuRoute for HP Chai on all devices listed in this section. Consult HP to determine compatible firmware versions for supported devices.

Server requirements

Embedded AccuRoute for HP Chai requires:

❐ AccuRoute v2.1 or later (must be fax-enabled to support fax-based features)

Note   AccuRoute v2.2/v2.3 installs the AccuRoute Intelligent Device Client v2.1.1 as part of the server install. If you are using AccuRoute v2.2, no separate AccuRoute Intelligent Device Client install is required.

❐ web server running Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension)

❐ Patch 12895 - This patch must be applied to the Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) before you can the User PIN Identification feature. For installation and configuration instructions, Configuring User PIN Identification (9-4).

The same system can be used for the AccuRoute server and the Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension).

Installation requirements

The installation procedure requires:

❐ Unique e-mail address for the Public Distributions feature

Note   When Embedded AccuRoute for HP Chai is installed without the Public Distributions option, this requirement does not apply.

❐ Filescan connector for the Scan to Folder and Scan to Folder with Scan More features

Note   When Embedded AccuRoute for HP Chai is installed without the Scan to Folder or Scan to Folder with Scan More options, this requirement does not apply.

Deployment requirements

Additional requirements for deployment:

❒　　**Public Distributions feature** - The user account associated with this feature must be able to create Embedded Directives. This requires access to AccuRoute Desktop v2.1 or later, AccuRoute Client v2.01.11, or the Web Client (where the user can create the Embedded Directives and Routing Sheets).

❒　　**Personal Distributions feature** - The device user must be able to create Embedded Directives. This requires access to AccuRoute Desktop v2.1 or later, AccuRoute Client v2.01.11, or the Web Client (where the user can create the Embedded Directives and Routing Sheets).

❒　　**MyAccuRoute and MyAccuRoute with Scan More features** - This requires access to AccuRoute Desktop v2.1 or later, (where the user can create the Embedded Directives and Routing Sheets). Additionally, MyAccuRoute must be configured in AccuRoute Desktop and on the server. For information, consult the AccuRoute Desktop installation guide. Go to <u>Related documentation</u> on 1-8.

❒　　**Routing Sheet and Routing Sheet with Scan More features** - The device user must be able to generate Routing Sheets. This requires access to AccuRoute Desktop v2.1 or later, AccuRoute Client v2.01.11, or the Web Client (where the user can create the Routing Sheets).

❒　　**Scan to Folder and Scan to Folder with Scan More features** - There are no special deployment requirements for this feature.

❒　　**Fax features** - There are no special deployment requirements for this feature.

Section 3: Installation

This section includes:

Downloading Embedded AccuRoute for HP Chai

To download Embedded AccuRoute for HP setup

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 the system running the Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension).

Installing Embedded AccuRoute for HP Chai

To install Embedded AccuRoute for HP Chai:

1   Log on to the system running Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension). Use a Windows account that belongs to the Administrators group.

2   Go to the folder containing the Embedded AccuRoute for HP setup and run **SETUP.EXE**. The InstallShield Wizard configures your system for the install and shows a welcome message.
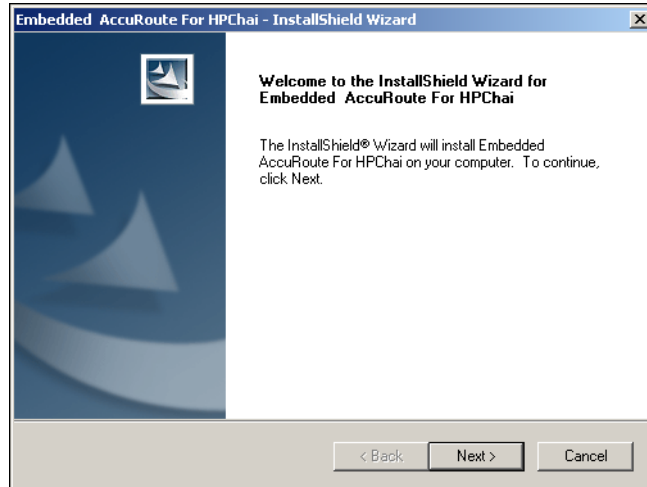
3   Click **NEXT**. The InstallShield Wizard window shows the license agreement.
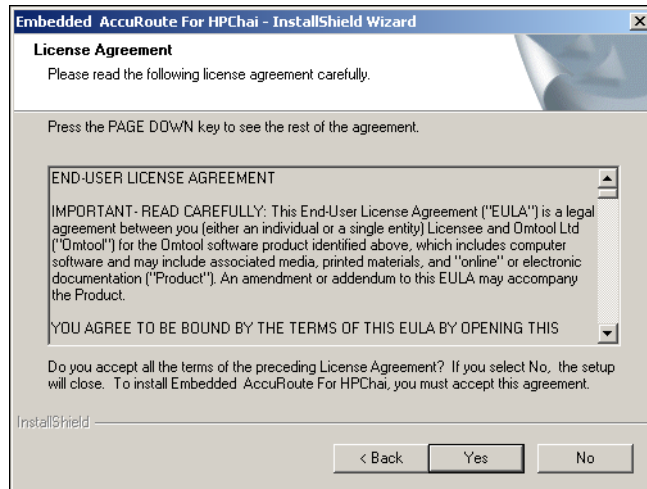
4   Read the license agreement and click **YES** if you agree to the terms. The InstallShield Wizard window shows the destination folder.
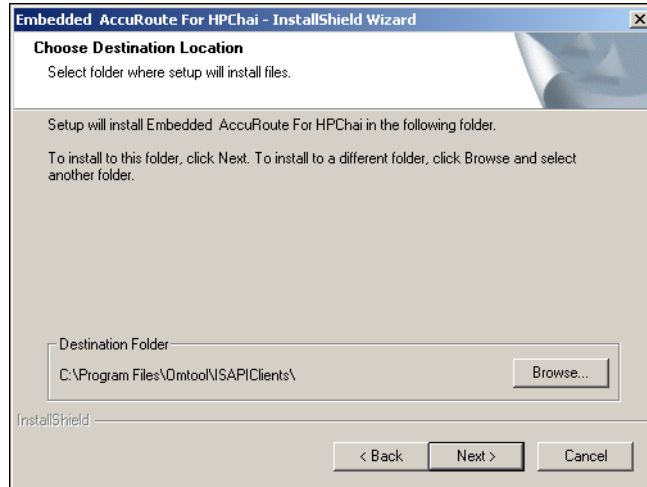
The default the destination folder is **C:\PROGRAM FILES\OMTOOL\ISAPICLIENTS**.

5   If you want to select a different folder as the destination, click **BROWSE**. Navigate to your preferred destination. Click **OK.**

6   Click **NEXT**.

The InstallShield Wizard window shows product options.
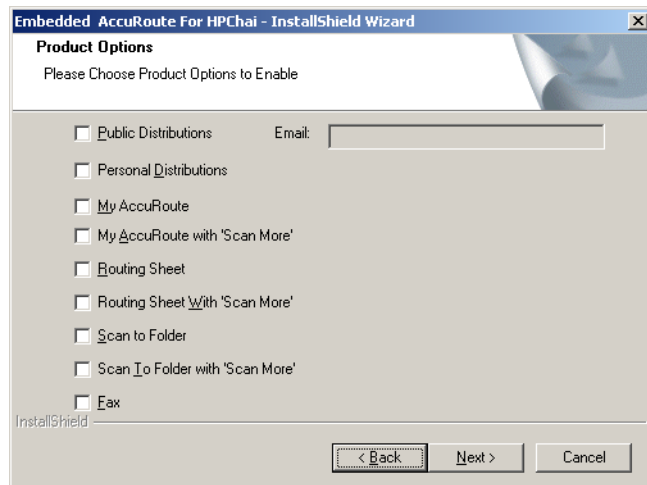
7   Select options for the installation.

For information on each of the options (AccuRoute scanning features), go to Table 1-A: AccuRoute scanning features in Embedded AccuRoute for HP Chai on 1-2.

If you choose the Public Distributions option, you must specify an email address. All Embedded Directives for this user that are published as public will be listed under Public Distribution options. If you do not specify the email address, you get an error message prompting you to specify the email address.
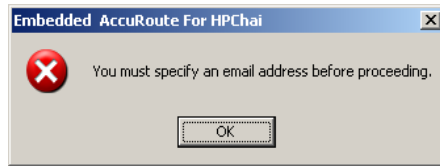
8   Click **NEXT**. Specify the **Authentication Mechanism**.
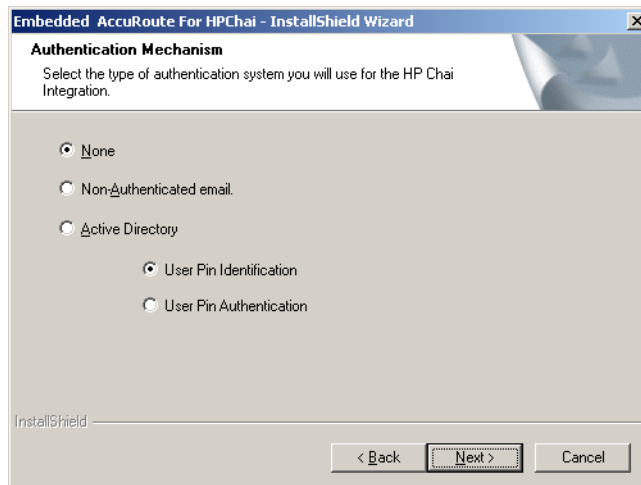
a   If you do not want to use Omtool authentication (for example, you want to use LDAP authentication, select **NONE**.

b   If you want to use email as the authentication method, select **NON-AUTHENTICATED EMAIL**.

c   If you want to use PIN authentication, select **ACTIVE DIRECTORY.**

   ‣   If you wan to set up authentication through just the user PIN, select **USER PIN IDENTIFICATION**.

Note   Before you can use User PIN Identification, you must apply Patch 12895, see Applying Patch 12895 (9-4)

   ‣   If you want the device user to use their password in addition to the PIN when logging in, select **USER PIN AUTHENTICATION**.

Note   For more information on the Omtool Authentication methods, see Authentication options (9-1)

9   Click **NEXT**.

❍ If you select **NON-AUTHENTICATED EMAIL** the **Email Information** page opens. Go to step 10.

❍ If you select **ACTIVE DIRECTORY** and choose the **USER PIN IDENTIFICATION**, the following page opens. Go to step 11.

 ❍ If you select **ACTIVE DIRECTORY** and choose the **USER PIN AUTHENTICATION**, the following page opens. Go to step 12.

10 Make the following modifications. Go to step 13.

 a Enter the **DEFAULT EMAIL DOMAIN**. This is displayed on the device. For example, `omtool.com` is a default domain.

 b If you want to set up a log on confirmation screen, check the box beside **USE CONFIRMATION SCREEN**.

 c If you want to change the default label names, modify the **EMAIL DOMAIN LABEL** field.

11 Make the following modifications. Go to step 13.

 a Enter the **DEFAULT DOMAIN**. This is displayed on the device.

 b Enter the name of the **LDAP SERVERNAME**. You can enter the name of the server or its IP address.

  An example is `EmployeeData` (server name) or its IP address.

 c Enter the full domain name in the **LDAP SEARCHBASE** field.

  For example, if your full domain name is `test.mycompany.com`, enter `dc=test, dc=mycompany,dc=com`

 d Enter the **ATTRIBUTE NAME**. This attribute name is actual attribute that is defined in the Active Directory.

  Examples are `employeeID, TimeKeeper ID`.

 e Enter The **USERID MASK**. The user ID/PIN entered by the device user is validated only if it matches the mask pattern.

  An example of a UserID mask is A[0-9][0-9]. In this example, all valid user ID should start with "A" followed by two numeric digits. In this case if the device user enters an ID of A8, it would not be validated and the ID contains too few digits.

Note The UserIDMask is an optional configuration.

 f If you want, you can modify the **USERID LABEL**. The label is the name of the user ID field.

Examples are "User PIN", "Employee ID" etc.

g   If you want to set up a log on confirmation screen, check the box beside **USE CONFIRMATION SCREEN**.

12   Make the following modifications. Go to step 13.

a   Enter the **DEFAULT DOMAIN**. This is displayed on the device.

b   Enter the name of the **LDAP SERVERNAME**. You can enter the name of the server or its IP address.

An example is `EmployeeData` (server name) or its IP address.

c   Enter the full domain name in the **LDAP SEARCHBASE** field.

For example, if your full domain name is `test.mycompany.com`, enter `dc=test, dc=mycompany,dc=com`

d   Enter the **ATTRIBUTE NAME**. This attribute name is actual attribute that is defined in the Active Directory.

Examples are `employeeID, TimeKeeper ID`.

e   Enter The **USERID MASK**. The user ID/PIN entered by the device user is validated only if it matches the mask pattern.

An example of a UserID mask is A[0-9][0-9]. In this example, all valid user ID should start with "A" followed by two numeric digits. In this case if the device user enters an ID of A8, it would not be validated and the ID contains too few digits.

f   If you want, you can modify the **USERID LABEL**. The label is the string of the user ID field. The default string value is UserID Label.

Examples are "User PIN", "Employee ID" etc.

g   If you want, you can modify the **PASSWORD LABEL**. The label is the string value of the password field.

h   If you want to set up a log on confirmation screen, check the box beside **USE CONFIRMATION SCREEN**.

13   Click **NEXT**. The InstallShield Wizard window shows the current installation settings.
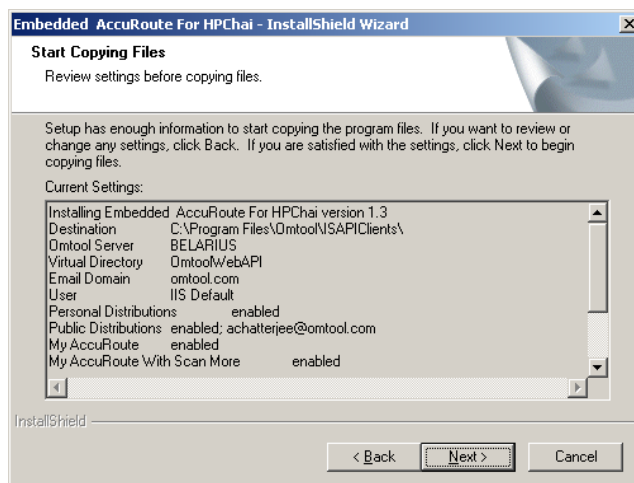
14   Click **NEXT**. The setup installs Embedded AccuRoute for HP Chai. A progress window shows the status of the installation along with the specific components that are being installed.
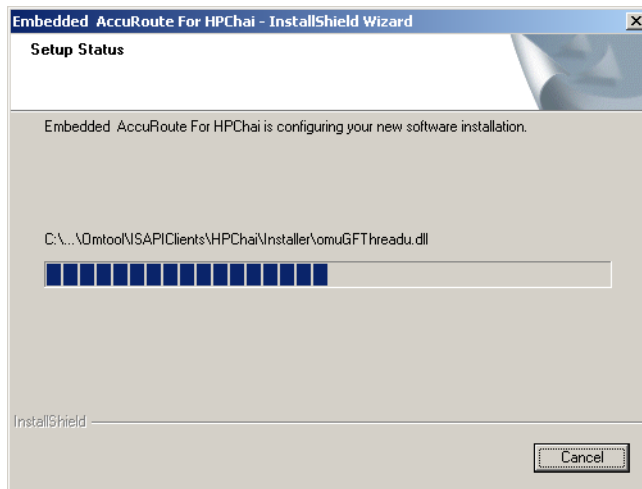
15   After installation is complete, the InstallShield Wizard window shows a message indicating that the installation was successful.
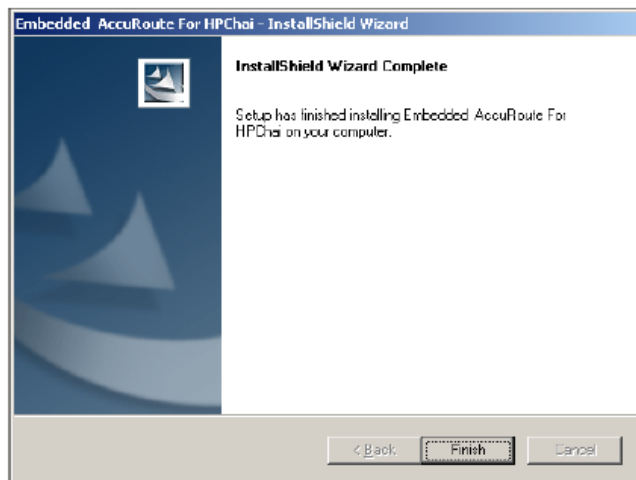
16   Click **FINISH**.

Continue to .

Installing Embedded AccuRoute for HP Chai on a remote web server

When installing Embedded AccuRoute for HP Chai on a remote web server, you must

- Assign Distributed COM permissions on system running the AccuRoute server before installing Embedded AccuRoute for HP Chai.

- Specify the AccuRoute server name in the OmISAPIUHP.xml configuration file after installation is complete. Here are the steps:

1   Navigate to the **Scripts** directory.

    ‣ If you are using AccuRoute v2.1, it is located here:
      C:\PROGRAM FILES\COMMON FILES\OMTOOL\WEBAPI\SCRIPTS

    ‣ If you are using AccuRoute v2,2 or later, it is located here:
      C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\WEBAPI\OMTOOLWEBAPI\SCRIPTS

2   Open `OmISAPIUHP.xml` for editing.

3   Go to the `<ServerName>` node and enter the remote AccuRoute server name.

4   Save the file.

Uninstalling Embedded AccuRoute for HP Chai from the web server

To uninstall Embedded AccuRoute for HP Chai from the web server:

1   Go to the **CONTROL PANEL** and start **ADD OR REMOVE PROGRAMS**.

2   Select **EMBEDDED ACCUROUTE FOR HP CHAI** and click **CHANGE/REMOVE**.

    You are prompted to confirm that you want to uninstall the software.
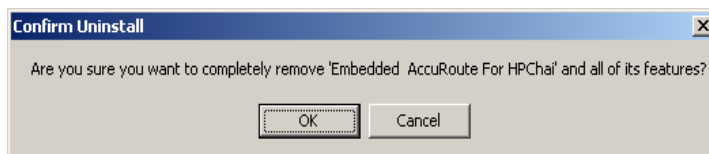
3   Follow the prompts to remove Embedded AccuRoute for HP Chai.

    A progress window shows the status of the uninstallation.

4   Click **FINISH**.

Section 4: Required configuration on the device

This section includes:

Complete these procedures in the order they appear. Additionally, this chapter also contains instructions the following:

Setting the MIME Type Value

Before you upload the Omtool Chailet to the devices, you must add ".properties" and ".xml" extensions in the MIME Type section of the "HTTP headers" page of the HPChaiSources in IIS.

To set the MIME type value

1   Log on to the system running Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension). Use a Windows account that belongs to the Administrators group.

2   Go to **CONTROL PANEL > ADMINISTRATIVE TOOLS > INTERNET INFORMATION SERVICES (IIS) MANAGER**.

3   Expand the web server system listed on the left pane.

4   Go to **DEFAULT WEB SITE > HPCHAISOURCES**.

5   Right click **HPCHAISOURCES** and select **PROPERTIES**.

6   In the **Properties** page, go to **HTTP HEADERS** tab.

7   Click **MIME TYPES**.

8   Click **NEW**.

9   In the **Mime Type** page that opens, enter the following information.

   a   For **EXTENSION**, enter `.properties`.

   b   For **MIME TYPE**, enter `application/octet-stream`.

10   Click **OK**, then **APPLY** to save your changes.

Clearing the target device

Clear the target device before you upload the Omtool chailet.

To clear a device:

1   Switch the device off and then turn it on.

2   As soon as the device beings to count memory, press and hold the **left** side of the **START** button on the control panel.

3   Wait for the device to finish counting memory. The status lights on the control panel blink.

4   When all the status lights are on at the same time, release the **START** button.

5   Press **5** on the control panel. The display panel reads **INITIALIZE DISKS**.

6   Press **6**. The display panel reads **CONTINUING BOOT SEQUENCE**.

7   Wait for the device to boot.

Continue to Uploading the Omtool chailet using AccuRoute HP Chai Device Loader.

Uploading the Omtool chailet using AccuRoute HP Chai Device Loader

AccuRoute HP Chai Device Loader is an upload utility for the Omtool chailet. It enables you to build and save a device list, configure upload options, and upload the Omtool chailet to any device on demand. Additionally, it maintains an installation log that can be exported to a *.TXT file and saved.

This section includes:

Starting AccuRoute HP Chai Device Loader

To start AccuRoute HP Chai Device Loader:

Go to **START** > **PROGRAMS** > **OMTOOL** > **ACCUROUTE HP CHAI DEVICE LOADER**. The AccuRoute HP Chai Device Loader opens.

Figure 4-A **AccuRoute HP Chai Device Loader**
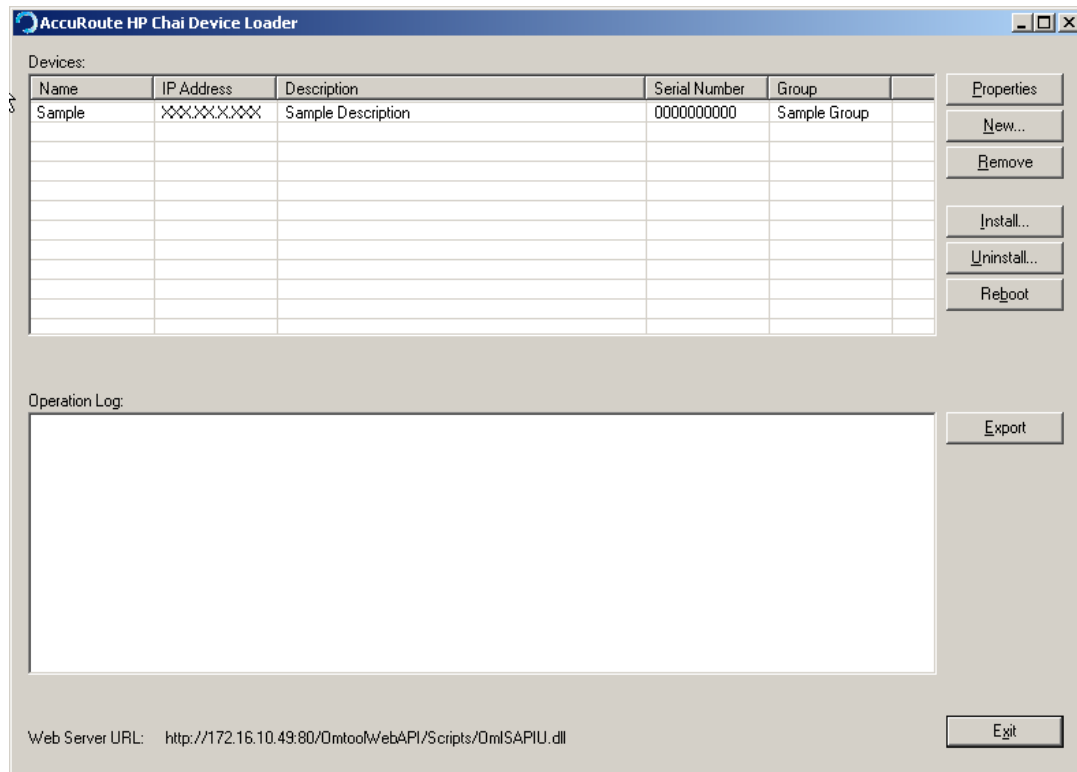
AccuRoute HP Chai Device Loader, an upload utility for the Omtool chailet, enables you to build and save a device list, configure upload options, and upload the Omtool chailet and the Omtool Authentication Agent to any device on demand.

Tip   To view hot keys for AccuRoute HP Chai Device Loader functions, press **ALT**.

The AccuRoute HP Chai Device Loader window displays basic properties about each device. It does not indicate whether the Omtool chailet has been uploaded or the last upload date. This information must be tracked manually.

Building the device list

The **Devices** section of the AccuRoute HP Chai Device Loader page lists the devices where the Omtool chailet can be uploaded. Add, remove, or edit devices as necessary.

This section includes:

Adding a device to the list (4-4)

Editing a device in the list (4-4)

Removing a device from the list (4-5)

Adding a device to the list

To add a device to the list:

1 Click **NEW**. The Device Properties dialog box appears.

2 Complete the fields following the guidelines in the table below.

Table 4-A **Device properties that can be stored in AccuRoute HP Chai Device Loader**

Device property	Description	Required	Validated
name	Friendly name used to help identify devices in the list, such as the location, purpose, or model of the device.	yes	no
IP address	Location of the device in the LAN.	yes	yes
serial number	Unique ID number that was issued by the device manufacturer.	no	no
group	Name of the Omtool chailet configuration profile that the device should run. (This field should remain blank if all devices in the LAN use the default configuration.) Enter a custom value only if one has been provided for your company's use.	no	no

3 Click **OK**. The device appears in the device list.

Editing a device in the list

To edit a device in the list:

1 Select a device in the list.

2 Double click the device you selected or click **PROPERTIES**.

The Device Properties dialog box opens.

3 Modify the device information following the guidelines in Table 4-A Device properties that can be stored in AccuRoute HP Chai Device Loader on 4-4

4 Click **OK**. The device appears in the list with the modified device properties.

Removing a device from the list

To remove a device from the list:

1   Select the device(s) you want to remove from the list:

❏   **To select one device**: Select the device in the list.

❏   **To select multiple devices in the list**: Press and hold **CTRL**, and select the devices.

❏   **To select consecutive items in a group**: Press and hold **SHIFT**, and select the first and last items in the group.

2   Click **REMOVE**.

3   A confirmation message opens asking you to confirm that you want to delete the selected items.

4   Click **YES**. The selected devices are removed from the list.

Uploading the Omtool chailet

When uploading the Omtool chailet to a device, choose a time when the target device is not in use. Immediately following an upload, the device automatically reboots and then loads the new AccuRoute scanning features.

Allow time for testing. Each AccuRoute scanning feature should be tested at least once. For more information on the steps involved in testing the AccuRoute scanning features, go to Section 7: Testing.

Note   To upload the Omtool Chailet, AccuRoute HP Chai Device Loader requires the login credentials of the device administrator. The password on the administrator account must be set in the Embedded Web Server prior to running the upload. For more information on setting the administrator password, consult the device documentation.

To upload the Omtool chailet to one or more devices in the device list:

1   Select the device(s) where you want to upload the Omtool chailet:

❏   **To select one device**: Select the device in the list.

❏   **To select multiple devices in the list**: Press and hold **CTRL**, and select the devices.

❏   **To select consecutive items in a group**: Press and hold **SHIFT**, and select the first and last items in the group.

2   Click **INSTALL**. You are prompted to choose the installation components.
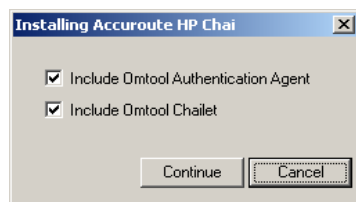
By default, the **Omtool Authentication Agent** and the **Omtool Chailet** components are selected.

3 De-select the Omtool Authentication Agent option if you want your users to authenticate using an LDAP or using a third party agent such as secure Jet.

4 Click **CONTINUE**. The Device Login dialog box opens.
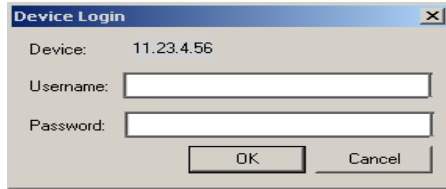
5 Enter the username and password of the device administrator. Click **OK**.

AccuRoute HP Chai Device Loader begins uploading the Omtool chailet to the device. As it uploads the Omtool chailet to devices, AccuRoute HP Chai Device Loader writes to the Log area.
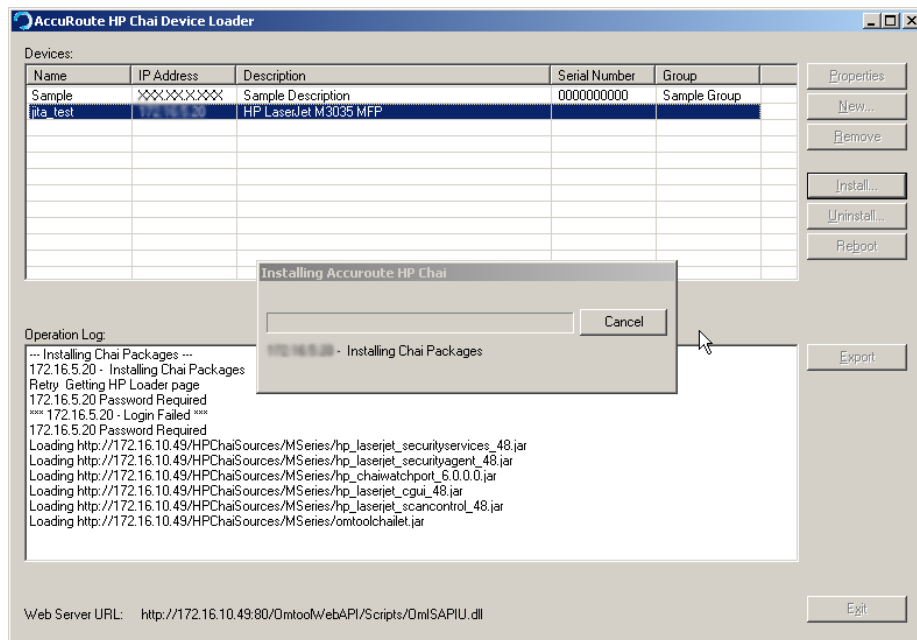
Note The device counters at the bottom of the window indicate successful uploads (**DEVICES SUCCEEDED**), failed uploads (**DEVICES FAILED**), and pending uploads (**DEVICES REMAINING**). A device is counted as a remaining device until the upload is complete.

When the upload is complete, a message box displays the results and the device counters are updated.
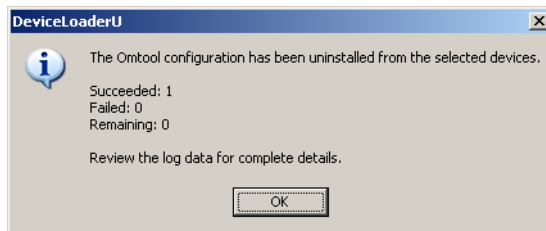
6 Click **OK**.

When upload is complete, the device to which the Chailet was uploaded reboots.

7   Wait for the machine to reboot. When reboot is complete, verify that the AccuRoute scanning features are visible on the control panel of the device.

Note   The AccuRoute scanning features load one at a time. It can take several minutes for the device to boot and load all the AccuRoute scanning features.

If the AccuRoute scanning features are not visible on the control panel, the most likely cause is that the web server is running Windows 2003 and IIS is not configured to allow the web server extensions WebDAV and Omtool ISAPI Services to run. For more information, consult the Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) installation guide. Go to Related documentation on 1-8.

8   Before ending the session, export the log. Continue to Exporting the log file.

Exporting the log file

Before you exit AccuRoute HP Chai Device Loader, export the log to a *.TXT file. The log is cleared automatically when you exit the application, so this information cannot be retrieved later.

Tip   Omtool recommends exporting the log from every session so that you have a record of the devices where the Omtool chailet has been uploaded.

To export the log:

1   Click **EXPORT LOG**.

2   Browse to the folder where you want to save the log file, type a name for the log file in the **FILE NAME** field.
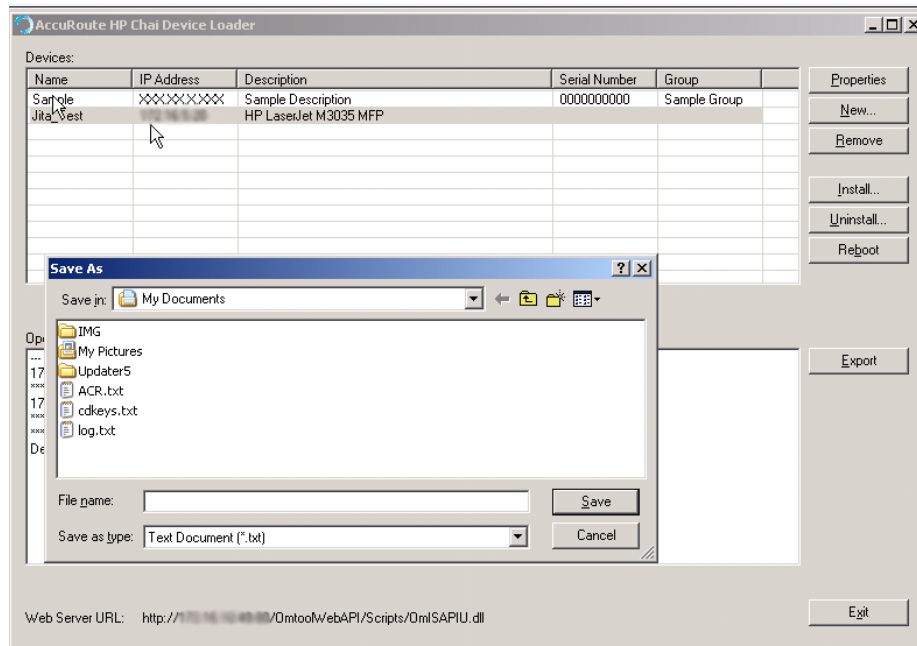
3   Click **OK**.

Exiting AccuRoute HP Chai Device Loader after saving the device list

AccuRoute HP Chai Device Loader prompts you to save changes to the device list when you exit the application.

To exit AccuRoute HP Chai Device Loader and save the device list:

1   Click **EXIT**. A message box prompts you to save the device list.

A message opens asking you to confirm that you want to save the device information.
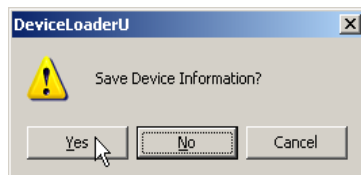
2   Click **YES**.

AccuRoute HP Chai Device Loader saves the changes to the device list and closes the Device Loader page.

Uninstalling the Omtool Chailet from a device

To uninstall Omtool chailet from a device:

1   In the device list, select the device from which you want to uninstall Omtool Chailet.

2   Click **UNINSTALL**. A message box prompts you to save the device list.

A message opens asking you to confirm that you want to proceed with the un-installation.
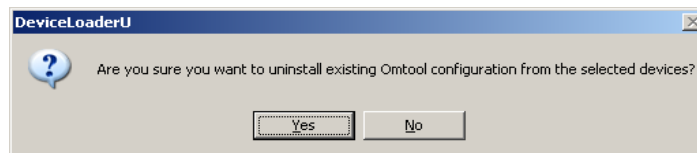
3   Click **YES**.

If you are logged into the device, AccuRoute HP Chai Device Loader uninstall Omtool Chailet from the device. A progress window shows the status of the un-installation.
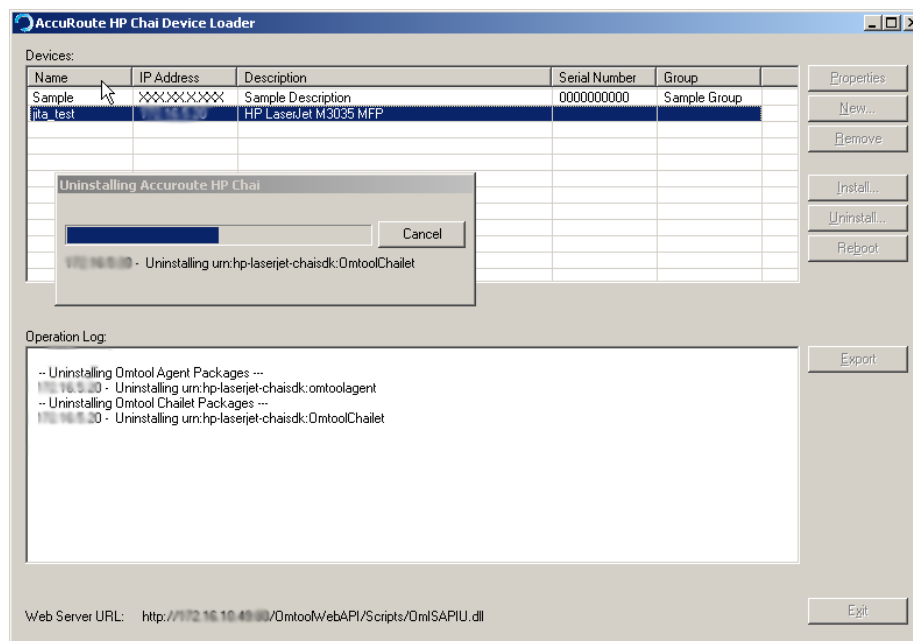
4   If you are not logged into the device, you are prompted to enter you user name and your password.

AccuRoute HP Chai Device Loader uninstall Omtool Chailet from the device.

When un-installation is complete, you see the following message.
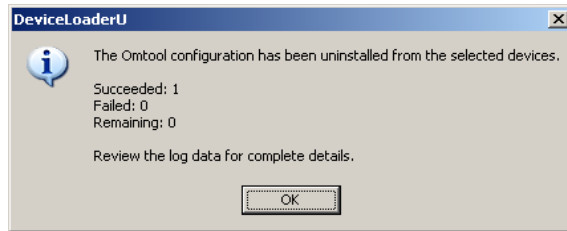
5   Click **OK** to close the message window.

After you have uninstalled the Omtool Chailet from a device, you can remove the device from the devices list. For instructions, see [Removing a device from the list](#) (4-5).

Section 5: Required configuration on the server

This section includes:

When a message arrives on the Omtool server, the Dispatch component applies rules to the message. The rules determine how the server processes the message. Every message on the server must match a rule associated with an action in order to be processed and distributed to its final destination. The additional configuration in this section ensures that rules exist for AccuRoute scanning features.

Several AccuRoute scanning features require special rules on the Omtool server. Create rules based on the AccuRoute scanning features available on devices in your environment.

Note   The rule required for the Fax feature uses the default Telco rule created automatically on an Omtool server with a Telco connector.

When rules have been created for all AccuRoute scanning features available on devices in your environment, the Omtool server is fully configured for Embedded AccuRoute for HP Chai. Now you are ready to test the AccuRoute scanning features. Go to Section 7: Testing.

Creating a rule for Routing Sheet features

When a device user scans a document using the Routing Sheet features, the Omtool chailet associates the destination address "accuroute" with the scan. This is the unique characteristic you must use to create a rule for this feature.

The routing rule you create must route outbound messages with the destination **accuroute** to the Embedded Directive Manager component which, searches the text in the scanned document and identifies the Embedded Directive ID. The AccuRoute server then decodes the Embedded Directive ID and distributes the document.

The device user is able to use the Routing Sheet features (Routing Sheet or Routing Sheet with Scan More) only if you create an outbound rule in the AccuRoute server.

To create a rule for scans with Routing Sheets:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   Expand **RULES**, right-click **OUTBOUND** and select **NEW > RULE**. The Create New Rule wizard opens.

3   Set the criteria for this rule:

    a   Click **ADD**, select **DESTINATION IS AN E-MAIL ADDRESS**. Click **NEXT**.

    b   Select **IS**, enter accuroute, click **ADD.**

    c   Click **FINISH**. The Create New Rule wizard adds the criteria to the rule.

    d   Click **NEXT**.

4   Create the action for this rule:

    a   Click **ADD**, select **ROUTE TO EMBEDDED DIRECTIVE MANAGER** in the actions list.

    b   Click **NEXT**.

    c   Verify that **SCAN DOCUMENT(S) FOR EMBEDDED DIRECTIVE** is selected.

    d   Click **FINISH**. The Create New Rule wizard adds the action to the rule.

    e   Click **NEXT**.

5   Click **NEXT** to bypass the failover actions screen.

6   Verify that **STOP PROCESSING OTHER RULES** is selected and click **FINISH**. The new outbound rule opens in the details pane.

Important   This rule must appear above the default rule for any mail connector. (The default rule for a mail connector routes all messages with an e-mail destination address to the mail connector.)

Creating a rule for Personal Distributions and Public Distributions features

When a device user selects the Public Distribution/Personal Distributions feature and scans a document, the Omtool chailet associates an Embedded Directive with the scan. This is the unique characteristic you must use to create a rule for this feature.

The rule you create must route outbound messages with an Embedded Directive to the Embedded Directive Manager component, which applies the Embedded Directive that the user selected on the device. Then the Omtool server decodes the Embedded Directive ID and distributes the document.

The device user is able to use the Personal Distribution and Public Distribution features only if you create an outbound rule in the AccuRoute server.

To create a rule for scans with Embedded Directives:

1 Start the Administrator.

2 Expand **RULES**, right-click **OUTBOUND** and select **NEW > RULE**. The Create New Rule wizard opens.

3 Set the criteria for this rule:

    a Click **ADD**, select **EMBEDDED DIRECTIVE**. Click **NEXT**.

    b Select **IS**, type * in the text box, click **ADD**.

    c Click **FINISH**. The Create New Rule wizard adds the criteria to the rule.

    d Click **NEXT**.

4 Create the action for this rule:

    a Click **ADD**, select **ROUTE TO EMBEDDED DIRECTIVE MANAGER**. Click **NEXT**.

    b Select **USE SENDER SPECIFIED EMBEDDED DIRECTIVE**.

    c Click **FINISH**. The Create New Rule wizard adds the action to the rule.

    d Click **NEXT**.

5 Click **NEXT** to bypass the failover actions screen.

6 Verify that **STOP PROCESSING OTHER RULES** is selected and click **FINISH**. The new outbound rule appears in the details pane.

Creating a rule for MyAccuRoute features

When a device user selects the MyAccuRoute or MyAccuRoute with Scan More feature, logs in, and scans a document, the Omtool chailet associates the destination e-mail address **myaccuroute@omtool.com** with the scanned document. This is the unique characteristic you must use to create a rule for this feature.

The rule you create must route all outbound messages with the destination e-mail address **myaccuroute@omtool.com** to the Embedded Directive Manager component. The rule must instruct the Embedded Directive Manager component to identify the device user based on the login, apply the MyAccuRoute configuration of the device user to the scan, and distribute the document based on the Embedded Directive ID.

The device user is able to use MyAccuRoute or MyAccuRoute with Scan More feature, only if you create an outbound rule in the AccuRoute server:

To create a rule for scans to be distributed using MyAccuRoute:

1   Start the Administrator.

2   Expand **RULES**, right-click **OUTBOUND** and select **NEW > RULE**. The Create New Rule wizard opens.

3   Set the criteria for this rule:

   a   Click **ADD**, select **DESTINATION IS AN E-MAIL ADDRESS**, and click **NEXT**.

   b   Select **IS**, type myaccuroute@omtool.com in the text box. Click **ADD**.

   c   Click **FINISH**. The Create New Rule wizard adds the criteria to the rule.

   d   Click **NEXT**.

4   Create the action for this rule:

   a   Click **ADD**, select **ROUTE TO EMBEDDED DIRECTIVE MANAGER**. Click **NEXT**.

   b   Select **MY ACCUROUTE**, verify that **USE ORIGINATOR** is selected.

   c   Click **FINISH**. The Create New Rule wizard adds the action to the rule.

   d   Click **NEXT**.

5   Click **NEXT** to bypass the failover actions screen.

6   Verify that **STOP PROCESSING OTHER RULES** is selected and click **FINISH**. The new outbound rule appears in the details pane.

Creating a rule for Scan to Folder features

When a device user selects the Scan to Folder or Scan to Folder with Scan More feature, and scans a document, the Omtool chailet associates the destination e-mail address "FileScan" with the scanned document. This is the unique characteristic you must use to create a rule for this feature.

The routing rule you create must route all outbound messages with the destination e-mail address "FileScan" to a network folder. Other custom actions can be added to the rule.

The device user is able to use Scan to Folder or Scan to Folder with Scan More feature only if you create an outbound rule in the AccuRoute server:

To create a rule for scans using Scan to Folder:

1   Start the Administrator.

2   Expand **RULES**, right-click **OUTBOUND** and select **NEW > RULE**. The Create New Rule wizard appears.

3   Set the criteria for this rule:

  a   Click **ADD**, select **DESTINATION IS AN E-MAIL ADDRESS**, and click **NEXT**.

  b   Select **IS**, type `FileScan` in the text box, click **ADD**, and click **FINISH**. The Create New Rule wizard adds the criteria to the rule.

Note   The value FileScan is not case-sensitive.

  c   Click **NEXT**.

4   Create the action for this rule:

  a   Click **ADD**, select **ROUTE TO CONNECTOR**, and click **NEXT**.

  b   Select the Filescan connector in the **ROUTE TO CONNECTOR** menu, select a file format for delivered messages in the **DOCUMENT DELIVERY FORMAT** menu.

  c   Go to the override section and select **DESTINATION**. Then enter the location of the destination folder.

    UNC format must be used for any folder that is not on the Omtool server. For example: \\FileServer\ShareA

    A relative path to a local drive is valid if the drive is installed on the Omtool server. For example: c:\ScanToFolder

    d   Click **FINISH**. The Create New Rule wizard adds the action to the rule.

This action routes messages to the destination folder in the specified delivery format. Additional actions can be added to achieve a custom routing behavior but none are required.

    e   Click **NEXT**.

5   Add a failover action if necessary and click **NEXT**.

The failover action is executed if the primary action fails. For example, the primary action routes messages to a destination folder on FileServer A and the secondary action routes messages to a destination folder on FileServer B. A routing failure can occur if a network issue prevents communication between the Omtool server and the file server or if the file server is offline.

6   Verify that **STOP PROCESSING OTHER RULES** is selected and click **FINISH**. The new outbound rule appears in the details pane.

Section 6: Optional configuration

This section includes:

Enabling one touch scan capability

The one touch scan feature allows you to configure the Omtool Chailet in such a way that device users who use the Routing Sheet (with Scan More), MyAccuRoute (with Scan More) and Fax features, can use the one touch button capability.

> *Note*   The one touch scan capability is disabled by default.

If one touch scan capability is disabled, you are prompted to begin the scan job.
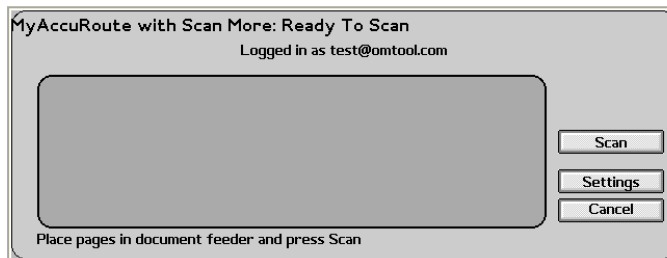
> *Note*   If one touch scan capability is disabled, the device user can change the scan options explained in Overriding default scan settings for the Omtool chailet (6-6)

In the Ready to Scan page, the device user can do the following:

- Click **SCAN** to begin the scan job.
- Click **SETTINGS** to make changes to the scan attributes.

    The **Settings** page looks like this:
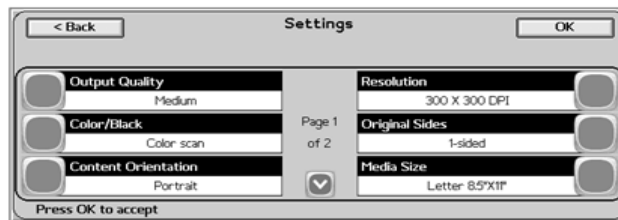
Note   Any changes made to the scan attribute are valid only for the current job.

The device user can make the following scan setting changes:

▸ **Output Quality** - Allows the device user to compress the output file.

▸ **Color/Black** - Allows the device user to set the preference for generating color or black and white images.

▸ **Content Orientation** - Allows device user to set the orientation of the output page.

▸ **Original Sides** - Allows device users to enable or disable duplex mode.

▸ **Media Size** - Allows the device user to set the output page size.

▸ **Resolution** - Allows setting the resolution of the output page.

▸ **Job Build** - Switch **ON/OFF** the job build mode. If job build mode is **ON**, it allows the user to append more documents.

When the device user has made the necessary changes, he should click **OK**. If the user wants to go back to the **Ready to Scan** page without making any changes, click **BACK**.

●   Click **CANCEL** to cancel the scan job.

Enabling one touch scan

If you enable one touch scan, the device user is not prompted to begin the scan job. The job starts automatically.

To enable one touch scan capability

1   Navigate to:

     C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\WEBAPI\OMTOOLWEBAPI\SCRIPTS

2   Open `OmISAPIUHP.xml` for editing.

3   Under the <OneTouchFeatures> node, go to <OneTouch> node.

4   Change the value from `false` to `true`.

5   Save the file.

6   Restart the World Wide Web Publishing services.

7   Restart the device (switch it off and on).

Overriding recipient property using Wizard or Settings page

The override recipient property feature allows the device administrator to configure property defined in the `configuration xml` file which overrides the original recipient properties set on the Accuroute Server. Additionally, it allows the user to provide the template tags either as an overriding property or by itself.

For example, when scanning a document, if the user wants to override the delivered document format, the user can select an alternate document format and send this information to the Accuroute server which in turn overrides the specified document format in the server.

Note	The following procedure can only be performed by Omtool server administrator.

Override delivery format in the AccuRoute server

To enable sender override the delivery format

1   Go to the Omtool server and navigate to outbound rules.

2   Find all rules rule that routes message to a connector.

3   For each of the rule that routes message to a connector, update the **ALLOW SENDER TO OVERRIDE THE DELIVERY FORMAT** field.

   a   Select the rule, right click and select **PROPERTIES** from the menu.

      The **Create New Rule** page opens.

   b   Click **NEXT**. Under **Specify the Actions to take for this Rule**, select the action item.

   c   Click **PROPERTIES**. The **Route to Connector** wizard opens.

   d   Select the check box beside **ALLOW SENDER TO OVERRIDE THE DELIVERY FORMAT**.

   e   Click **FINISH**.

4   Click **NEXT**, **NEXT** and then **FINISH** to complete your changes.

Setting override properties inside configuration xml file

In the `configuration xml` file, each override property is defined inside a <Prompts> node. You (device administrator) can configure these properties to generate wizards or add additional options to the **Settings** page.

To configure overriding property

1   Navigate to:

   C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\WEBAPI\OMTOOLWEBAPI\SCRIPTS

2   Open `OmISAPIUHP.xml` for editing.

3   Under the <Prompts> node, go to <Prompt> node.

```
<Prompts>
                    <Prompt>
                              <Display>Wizard|Settings</Display>
                               <Label>[label to display]</Label>
                              <Type MinLength="" MaxLength=""> [List |
Text] </Type>
                              <Values>
                                 <Value internal="code"
default="false|true">[displayed as] </Value>
                                  <Value internal="code"
default="false|true">[displayed as] </Value>
                              </Values>
                              <Property override="false|true">
templatetag="false|true">[property to override]</Property>
                    </Prompt>
</Prompts>
```

4   Modify the nodes under <Prompt> following the guidelines in the following table.

Table 6-A   Guidelines on modifying the overriding properties for the Omtool chailet

Property	Impact	Syntax
Display	Determines whether the overriding property would be displayed in a separate Wizard screen or inside Setting screen.	Use one of the following values: • Wizard • Setting
Label	Determines the title to be displayed for Wizard screen. The title is also displayed as the attribute name within the Setting screen.	[Name of the label]
Type	Determines the data type of the prompts. The attributes MinLength and MaxLength determine the minimum and maximum text data entry length respectively. If the default text value in the configuration xml file exceeds the MaxLength, then it chops off the length before displaying it. **Note: These attributes are not applicable for List data type.**	Use one of the following values: • Text • List
Value	Determines the value to be displayed or selected on the Wizard/Setting screen based on the data type. The attribute **internal** stores the corresponding internal code used within the Accuroute server.	[Value] [code value]

Table 6-A Guidelines on modifying the overriding properties for the Omtool chailet

Property	Impact	Syntax
	The attribute **default** denotes that the corresponding value is the default. For List data type, the value is selected by default on the screen. For Text data type, the corresponding value is displayed in the text box.	Use one of the following values: • true • false
Property	Determines the property name that is used within the Accuroute server.	[Property name]
	The **override** attribute denotes that this is an overriding property.	Use one of the following values • true • false
	The **templetetag** attribute denotes that this is a template tag.	Use one of the following values • true • false

Here are examples of how you can define the prompt data.

Example 1:

```
Prompt>
    <Display>Wizard</Display>
    <Label>File Type :</Label>
    <Type>List</Type>
    <Values>
      <Value internal="OCR.PDF" default="true" >PDF Searchable </Value>
       <Value internal="PDF"> PDF Image</Value>
       <Value internal="G4.TIF"> TIF </Value>
    </Values>
    <Property>prFinalFormCode</Property>
</Prompt>
```

Example 2:
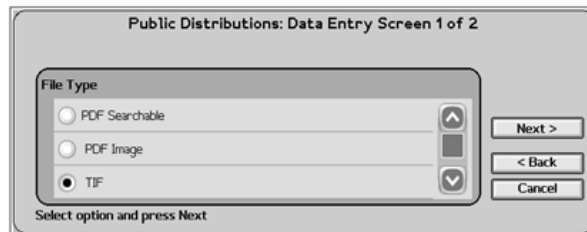
```
<Prompt>
    <Display>Wizard</Display>
    <Label>Filename :</Label>
    <Type>Text</Type>
    <Values>
        <Value internal="" default="true">Document</Value>
    </Values>
    <Property>prDeliveredDocumentName</Property>
```

```
</Prompt>
```

Wizard display type

If the <Prompt> data you define is "wizard" display type, it will generate a wizard screen for each of the prompt node you define, one after the other. So, for **Example 1**, it will generate a wizard listing all the files of the types defined in the prompt data.

The wizard pages open at different locations based on the AccuRoute scan job the device user selects.

- If the device user selects Public or Private Distributions, the wizard pages open as soon as the user selects a distribution.

- If the device user selects the Fax feature, the wizard pages open immediately after the first Fax page and only if there is no error.

- If the device user selects Routing Sheet or MyAccuroute (and if one touch is disabled) the wizard pages open as the first page immediately after the user selects the scan job option on the main AccuRoute menu.

The wizard pages are followed by the **ReadyToScan** page.

Settings display type

If the <Prompt> data you define for overriding property is of "settings" display type, the prompt data is displayed in the **Settings** screen in addition to the scan attributes.

Overriding default scan settings for the Omtool chailet

The Omtool chailet has its default scan settings that take precedence over the device settings. The override default scan settings for the Omtool Chailet feature allows device users modify the device scan settings so they override the Omtool Chailet scan settings.

You cannot change the scan settings for Routing Sheet (with Scan More), MyAccuRoute (with Scan More) and Fax features if the one touch scan capability is enabled.

Note	Device users can always override the Omtool chailet scan settings when they use the Public Distributions and Personal Distributions features. If one touch scan capability is enabled, device users cannot change the scan settings for Routing Sheet (with Scan More), MyAccuRoute (with Scan More) and Fax features.

Important	If device users is to modify the default scan settings, you (the deice administrator) must supply them with the appropriate values they should be using. (The quick start guides do not provide device users with information on modifying these settings.)

Enabling default scan settings for the Omtool Chailet

To set the default scan settings for the Omtool chailet:

1 Navigate to:

   C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\WEBAPI\OMTOOLWEBAPI\SCRIPTS

2 Open `OmISAPIUHP.xml` for editing.

3 Search on ChaiOptions. (In a default setup, there is one instance of this property and it is under the Default source. If any groups have been defined in this file, locate the instance that occurs under the source you want to modify.)

4 Edit the scan properties so they are appropriate for all or most device users. Use the guidelines in the table below.

Table 6-B   Guidelines on modifying the default scan properties for the Omtool chailet

Property	Impact	Syntax
JobBuildMode	Determines whether the device user can append scans	Use one of the following values: • true to allow the user to append scans • false to prevent the user from appending scans Users must be able to append scans if using "Scan More" features. (These features accommodate documents that are larger than the capacity of the document feeder.)
DuplexMode	Determines whether duplex mode is enabled.	Use one of the following values: • true to enable duplex mode • false to disable duplex mode
ResolutionMode	Determines the scanning resolution.	Use one of the following values: • 10 for 75dpi • 9 for 150 dpi • 8 for 200dpi • 7 for 300dpi • 6 for 400dpi • 5 for 600dpi

Table 6-B   Guidelines on modifying the default scan properties for the Omtool chailet

Property	Impact	Syntax
ImageMod	Optimizes the scan based on the document composition.	se one of the following values: • 0 for text • 1 for graphics • 2 for a combination of text and graphics
ColorMode	Determines whether the scan is saved in color or black and white.	Use of the following values: • 1 for black and white (grayscale) • 2 for color
QualityMode	Determines the file size.	Use one of the following values: • 0 for small • 1 for standard • 2 for large
Orientation	Determines the page orientation of the output file.	Use one of the following values: • 0 for portrait • 1 for landscape
MediaSize	Describes the size of the media being scanned.	Use one of the following values: • 0 for letter • 1 for legal • 3 for executive • 23 for statement
FileType	Determines the format of the output file.	Use 1 for PDF format.

5   Save your changes and close the file.

These settings take effect when the Omtool chailet refreshes its configuration using the configuration files on the web server.

Note   The default refresh interval is 1200 seconds (20 minutes).

Section 7: Testing

This section includes:

Testing the Public Distributions feature

To test the Public Distributions feature:

1   Create at least one Embedded Directive with the user account that is associated with the Public Distributions feature.

Note   The Embedded Directive must allow multiple use. (Applications that can create Embedded Directives include AccuRoute Desktop, the AccuRoute Client, and the Omtool Web Client.)

---

2   Assemble a test document and walk up to the device. The main screen looks like this:
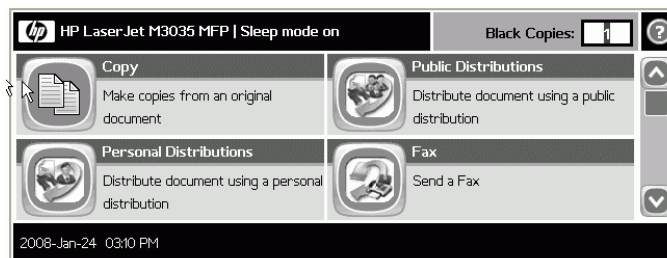
3   Load the document into the document feeder or place the document on the exposure glass. Use the exposure glass only if the test document is a single page.

4   Press **PUBLIC DISTRIBUTIONS**. (If this feature is not visible, use the scroll bar to find it.) The device shows public distribution options.
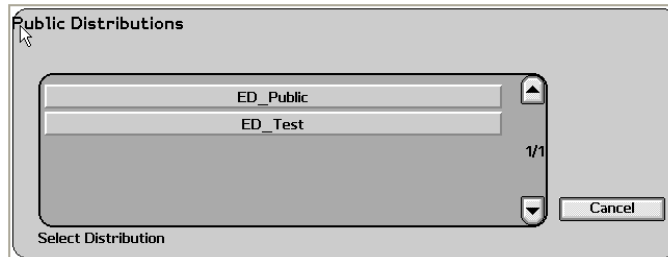
5   Select a distribution.
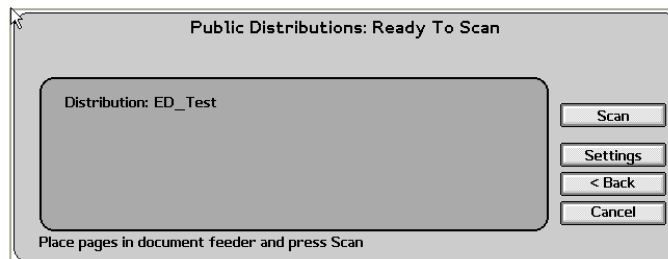
6   Click **SCAN**.

The scan job starts. A progress indicator shows the number of pages that are scanned.

7   If you want to abort the scanning operation press **CANCEL**. Otherwise wait for the job to finish.

After the job is finished, the document is transferred to the server where it will be processed as per the Embedded Directive instructions.

8   Click **OK** to return to the main page on the device.

9   Wait a few minutes and check the recipient address or destination to confirm delivery.

If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to Section 8: Troubleshooting.

Testing the Personal Distribution feature

To test the Personal Distribution feature:

1   Create at least one Embedded Directive with your user account.

Note   Applications that can create Embedded Directives include AccuRoute Desktop, the AccuRoute Client, and the Omtool Web Client.

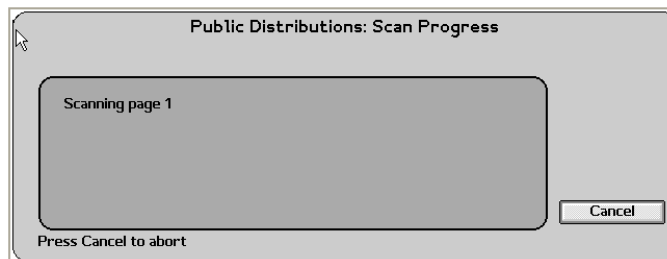2   Assemble a test document and go to the device.
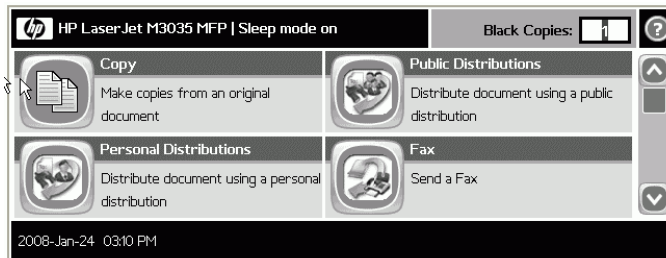
3   Load the document into the document feeder or place the document on the exposure glass. Use the exposure glass only if the test document is a single page.

4   Press **PERSONAL DISTRIBUTION**. (If this feature is not visible, use the scroll bar to find it.)

The device prompts you to log in.

If you are configured to use **Omtool Authentication Agent**, and the authentication mode is **email**, you see the following screen.

5   Log in to the device by following the steps below:

a   Press **E-MAIL USERNAME**. Then enter your e-mail user name and press **OK**.

The e-mail user name is everything before @ in your e-mail address. For example, if your e-mail address is jones@omtool.com, then your e-mail user name is jones.

b   Press **LOGIN**. The device shows your personal distribution options.
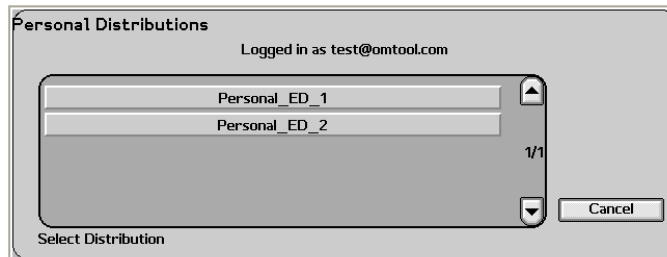
6   Select a distribution.

You see the Ready to Scan message.
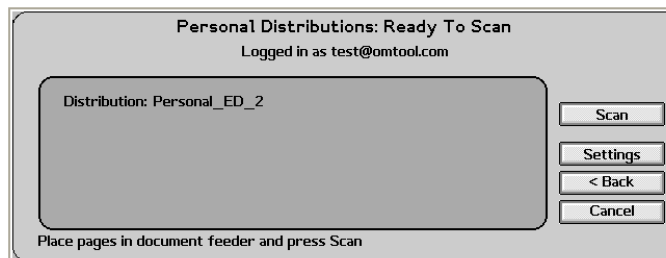
You can do the following:

a   To start the scan job, click **SCAN**.

b   To go back to the prior screen because the information you entered is not correct, click **BACK**.

c   To update the scan attributes, click **SETTINGS**.

d   To cancel the fax and go back to the main page, click **CANCEL**.

7   Click **SCAN**.

The scan job starts. A progress indicator shows the number of pages that are scanned.
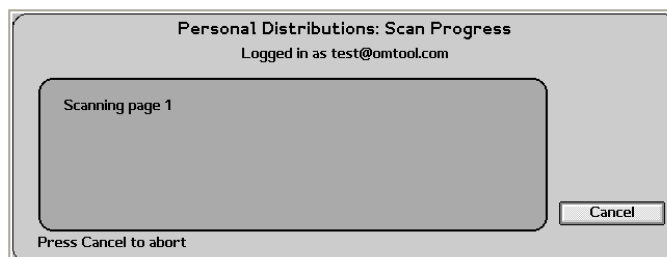
8 If you want to abort the scanning operation press **CANCEL**. Otherwise wait for the job to finish.

After the job is finished, click **OK**, to return to the main page on the device.
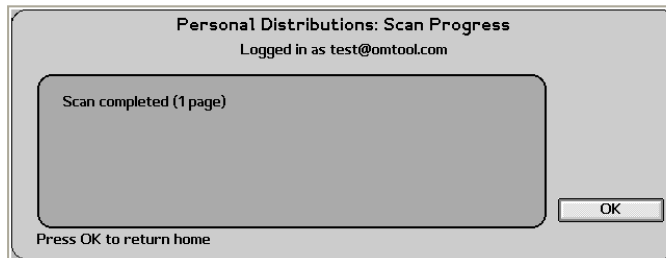
The scanned document is transferred to the server where it will be processed as per the Embedded Directive instructions.

9 Wait a few minutes and check the recipient address or destination to confirm delivery.

If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to Section 8: Troubleshooting.

Testing the Fax feature

To test the Fax feature:

1 Create at least one Embedded Directive with the user account that is associated with the Fax feature. The Embedded Directive must allow multiple use.

Note Applications that can create Embedded Directives include AccuRoute Desktop, the AccuRoute Client, and the Omtool Web Client.

**2** Assemble a test document and walk up to the device. The main screen looks like this:
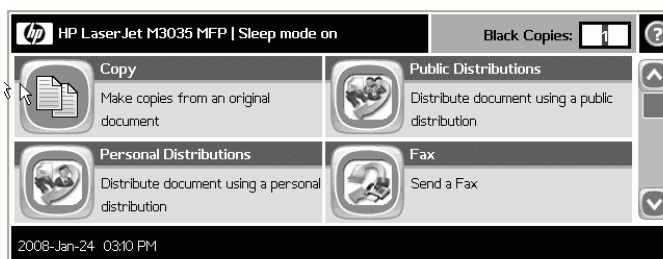
3   Load the document into the document feeder or place the document on the exposure glass. Use the exposure glass only if the test document is a single page.

4   Press **FAX**. (If this feature is not visible, use the scroll bar to find it.) The device shows fax options.

5   Enter the fax number by following the steps:

a   Press **FAX NUMBER** and enter the fax number from the keypad that opens.

b   Click **OK**.

          If you do not enter a fax number and proceed with the fax job, you will get the following error message:

          ```
          Fax Number is empty
          ```

6   If you are configured to add a cover page to your fax, go to the **Cover Sheet** section and click **ADD**.

          The **Sender Name**, **Recipient Name** and the **Subject** fields become active.

7   Enter the information you want to add to the cover sheet.

    a   To add your name (the sender's name), press the **Sender Name** text box and add the name using the keypad that opens.

    b   To add the name of the person you are sending the fax to, press **Recipient Name** text box and add the name using the keypad that opens.

    c   To add a subject to your fax, press the **Subject** text box and add the subject using the keypad that opens.

8   Click **OK**.

You see the Ready to Scan message.
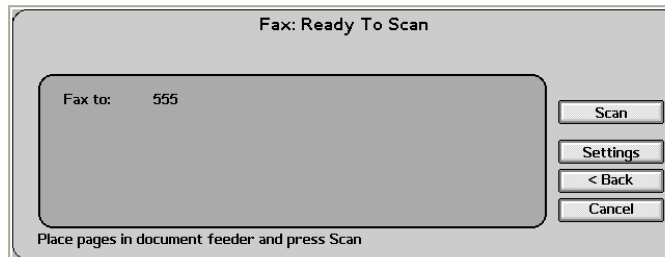
You can do the following:

    a   To start the scan job, click **SCAN**.

    b   To update the scan attributes, click **SETTINGS**.

    c   To go back to the prior screen because the information you entered is not correct, click **BACK**.

    d   To cancel the fax and go back to the main page, click **CANCEL**.

9   Click **SCAN**.

The scan job starts. You get a progress indicator telling you the number of the page that is being scanned.
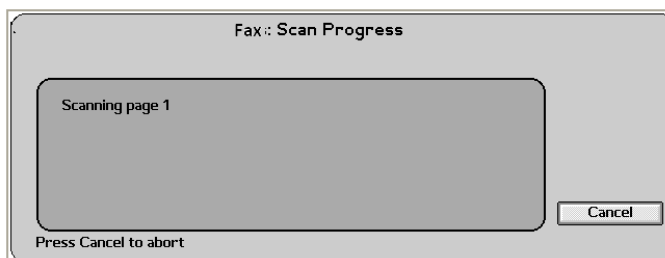
10   If you want to abort the scanning operation press **CANCEL**. Otherwise wait for the job to finish.

After the job is finished, the document is transferred to the server where it will be processed as per the Embedded Directive instructions.

11 Click **OK** to return to the main page on the device.

12 Wait a few minutes and check the recipient address or destination to confirm delivery.

If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to Section 8: Troubleshooting.

Testing the MyAccuRoute feature

To test the MyAccuRoute feature:

1 Verify that MyAccuRoute has been configured for your user account. For more information, consult the AccuRoute Desktop installation guide and AccuRoute Desktop user guide. Go to Related documentation on 1-8.

2 Assemble a test document and go to the device.The main screen looks like this:
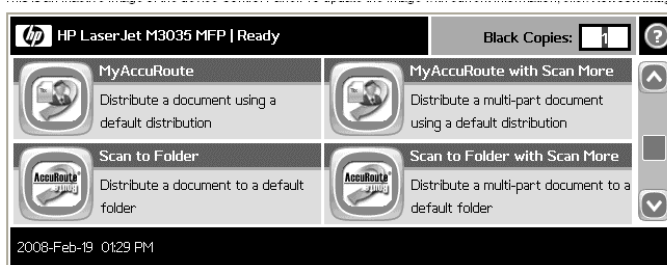
3 Load the document into the document feeder or place it on the exposure glass.

4 Press **MYACCUROUTE**. (If this feature is not visible, use the scroll bar to find it.) The device prompts you to log in.

If you are configured to use **Omtool Authentication Agent**, and the authentication mode is **email**, you see the following screen

5 Log in to the device by following the steps below:

a Press **E-MAIL USERNAME**. Then enter your e-mail user name and press **OK**.

The e-mail user name is everything before @ in your e-mail address. For example, if your e-mail address is jones@omtool.com, then your e-mail user name is jones.

b Press **LOGIN**.

You see the Ready to Scan message.

MyAccuRoute: Ready To Scan

Logged in as test@omtool.com

Scan

Settings

Cancel

Place pages in document feeder and press Scan

You can do the following:

a To start the scan job, click **SCAN**.

b To update the scan attributes, click **SETTINGS**.

c To cancel the job and go back to the main page, click **CANCEL**.

6 Click **SCAN**.

The scan job starts. You get a progress indicator telling you the number of the page that is being scanned.

MyAccuRoute: Scan Progress

Logged in as test@omtool.com

Scanning document...

Cancel

Press Cancel to abort

7 If you want to abort the scanning operation press **CANCEL**. Otherwise wait for the job to finish.

The document is transferred to the server where it will be processed as per the Embedded Directive instructions.

8 Click **OK** to return to the main page on the device.

9 Wait a few minutes and check the recipient address or destination to confirm delivery.

If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to Section 8: Troubleshooting.

Testing the MyAccuRoute with Scan More feature

To test the MyAccuRoute with Scan More feature:

1   Verify that MyAccuRoute has been configured for your user account.

For more information, consult the AccuRoute Desktop installation guide and AccuRoute Desktop user guide. Go to Related documentation on 1-8.

2   Assemble a test document and go to the device. The main screen looks like this:
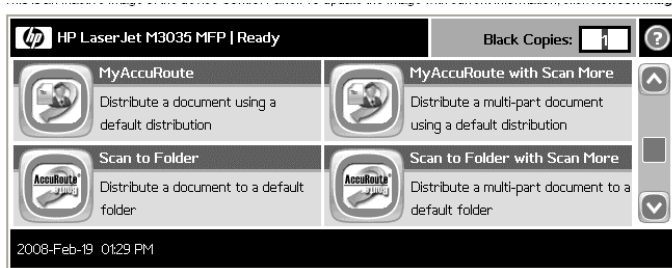
3   Load the document into the document feeder or place the first page on the exposure glass. For documents that are larger than the capacity of the document feeder, load the first part of the document into the document feeder.

4   Press **MYACCUROUTE WITH SCAN MORE.** The device prompts you to log in.
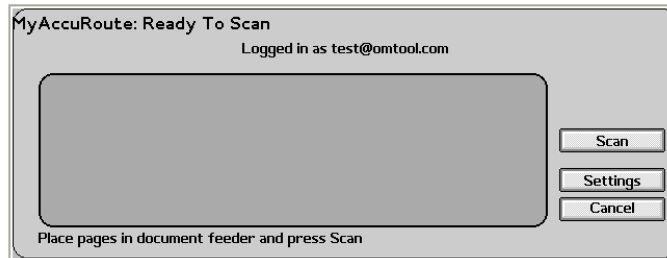
If you are configured to use **Omtool Authentication Agent**, and the authentication mode is **email**, you see the following screen

5   Log in to the device by following the steps below:

a   Press **E-MAIL USERNAME**. Then enter your e-mail user name and press **OK**.
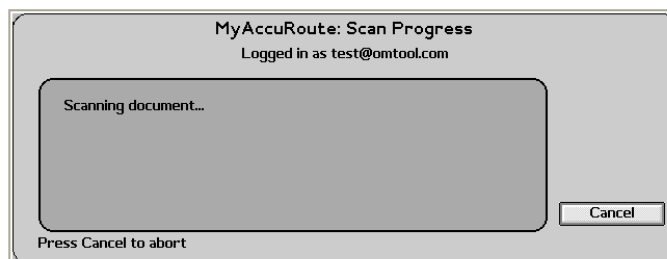
The e-mail user name describes everything before @ in your e-mail address. For example, if your e-mail address is jones@omtool.com, then your e-mail user name is jones.

b   Press **LOGIN**.

You see the Ready to Scan message.

```
MyAccuRoute with Scan More: Ready To Scan
              Logged in as test@omtool.com

                                                    Scan

                                                    Settings
                                                    Cancel
Place pages in document feeder and press Scan
```

You can do the following:

a   To start the scan job, click **SCAN**.

b   To update the scan attributes, click **SETTINGS**.

c   To cancel the job and go back to the main page, click **CANCEL**.

6   Click **SCAN**.

The scan job starts. You get a progress indicator telling you the number of the page that is being scanned.

```
MyAccuRoute with Scan More: Scan Progress
              Logged in as test@omtool.com

Scanning page 1

                                                    Cancel
Press Cancel to abort
```

7   You are prompted to choose from the options in the following screen.

```
MyAccuRoute with Scan More: Scan Progress
              Logged in as test@omtool.com

Building document (1 page)

                                                    Scan More
                                                    Finish
                                                    Cancel
Select option to continue
```

a   To continue scanning, click **SCAN MORE**.

b   To finish the scan job, click **FINISH**.

    c   To abort the scan job, click **CANCEL**.

8   To continue scanning, load the rest of the document into the document feeder or place the next page on the exposure glass, and then press **SCAN MORE**.

9   Continue to scan more till you have finished scanning all the pages in the document.

10   Click **FINISH**.

The document is transferred to the server where it will be processed as per the Embedded Directive instructions.

11   Click **OK** to return to the main page on the device.

12   Wait a few minutes and check the recipient address or destination to confirm delivery.

If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to Section 8: Troubleshooting.

Testing the Routing Sheet feature

To test the Routing Sheet feature:

1   Create at least one Embedded Directive with your user account.

Note   Applications that can create Embedded Directives include AccuRoute Desktop, AccuRoute Client, and the Omtool Web Client.

2   Generate and print a Routing Sheet using AccuRoute Desktop, the AccuRoute Client, or the Omtool Web Client.

3   Assemble a test document. Add the Routing Sheet to the very front of the document or at the back. Then go to the device. The main screen looks like this:

4   Load the document into the document feeder or place it on the exposure glass.

5   Press **ROUTING SHEET**. (If this feature is not visible, use the scroll bar to find it.)
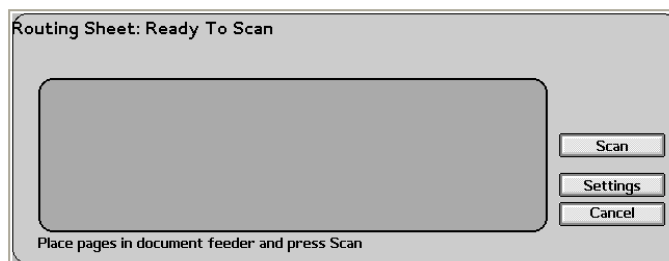
You see the Ready to Scan message.

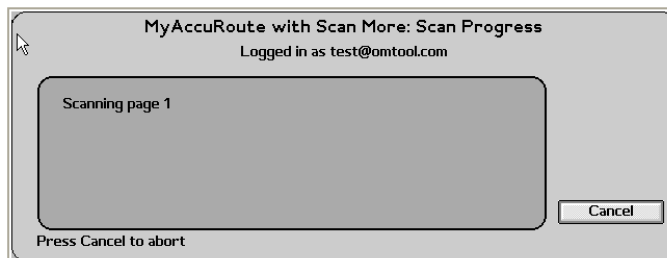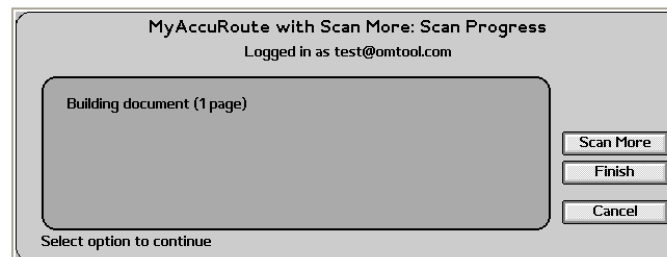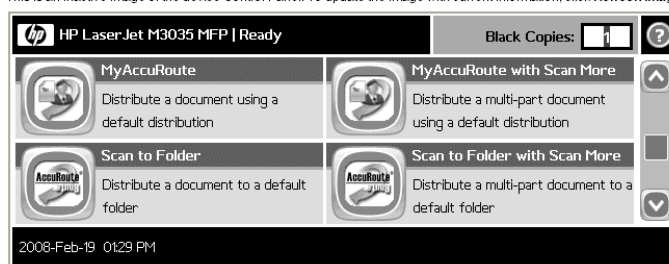
You can do the following:

a   To start the scan job, click **SCAN**.

b   To update the scan attributes, click **SETTINGS**.

c   To cancel the job and go back to the main page, click **CANCEL**.

6   Click **SCAN**.

The scan job starts. You get a progress indicator telling you the number of the page that is being scanned.

7   If you want to abort the scanning operation press **CANCEL**. Otherwise wait for the job to finish.

The document is transferred to the server where it will be processed as per the Embedded Directive instructions.

8   Click **OK** to return to the main page on the device.

9   Wait a few minutes and check the recipient address or destination to confirm delivery.

If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to Section 8: Troubleshooting.

Testing the Routing Sheet with Scan More feature

To test the Routing Sheet with Scan More feature:

**1**   Create at least one Embedded Directive with your user account.

Note   Applications that can create Embedded Directives include AccuRoute Desktop, AccuRoute Client, and the Omtool Web Client.

2   Generate and print a Routing Sheet using AccuRoute Desktop, the AccuRoute Client, or the Omtool Web Client.

3   Assemble a test document. Add the Routing Sheet to the very front of the document or at the back. Then go to the device. The main screen looks like this:

4   Load the document into the document feeder or place the first page on the exposure glass. For documents that are larger than the capacity of the document feeder, load the first part of the document into the document feeder.

Press **ROUTING SHEET WITH SCAN MORE**. (If this feature is not visible, use the scroll bar to find it.) You see the Ready to Scan message.
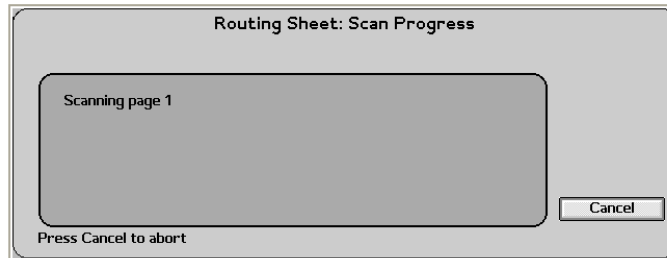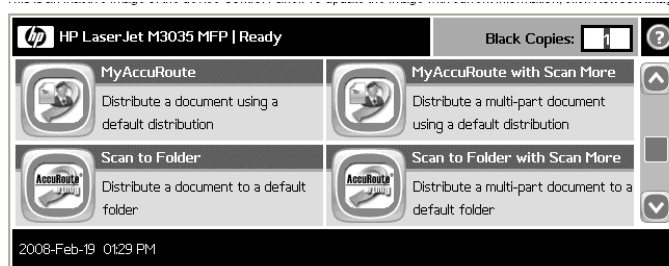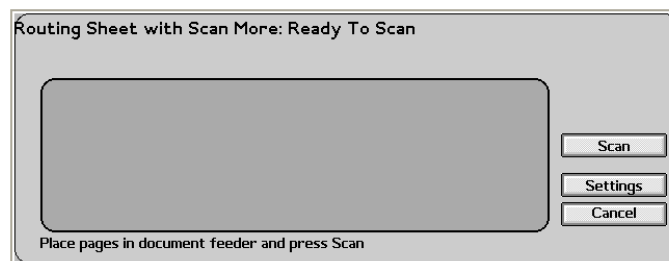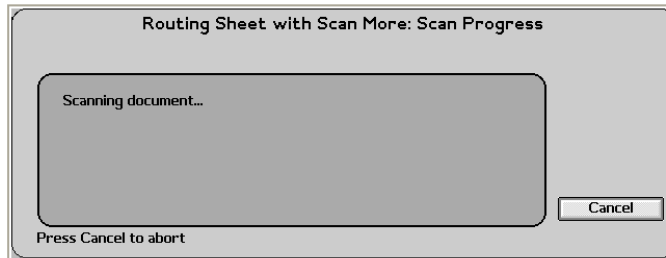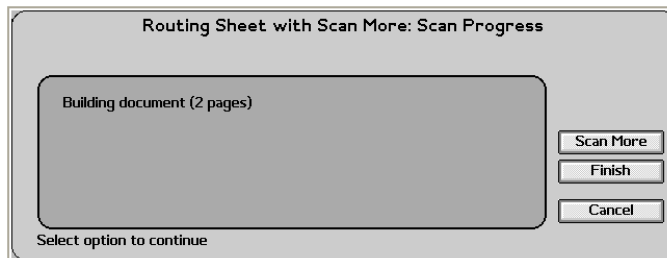

You can do the following:

a   To start the scan job, click **SCAN**.

b   To update the scan attributes, click **SETTINGS**.

c   To cancel the job and go back to the main page, click **CANCEL**.

5 Click **SCAN**.

The scan job starts. You get a progress indicator telling you the number page that are scanned.

6 You are prompted to choose from the options in the following screen.

a To continue scanning, click **SCAN MORE**.

b To finish the scan job, click **FINISH**.

c To abort the scan job, click **CANCEL**.

7 To continue scanning, load the rest of the document into the document feeder or place the next page on the exposure glass, and then press **SCAN MORE**.

8 Continue to scan more till you have finished scanning all the pages in the document.

9 Click **FINISH**.

The document is transferred to the server where it will be processed as per the Embedded Directive instructions.

10 Click **OK** to return to the main page on the device.

11 Wait a few minutes and check the recipient address or destination to confirm delivery.

If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to Section 8: Troubleshooting.

Testing the Scan to Folder feature

To test the Scan to Folder feature:

1   Assemble a test document and go to the device. The main screen looks like this:

2   Load the document into the document feeder or place the first page on the exposure glass.

3   Press **SCAN TO FOLDER**. (If this feature is not visible, use the scroll bar to find it.)

      You see the Ready to Scan message.

      You can do the following:

   a To start the scan job, click **SCAN**.

   b To update the scan attributes, click **SETTINGS**.

   c To cancel the job and go back to the main page, click **CANCEL**.

4   Click **SCAN**.

      The scan job starts. You get a progress indicator telling you the number of the page that is being
      scanned.

5   If you want to abort the scanning operation press **CANCEL**. Otherwise wait for the job to finish.

The document is transferred to the server where it will be processed as per the Embedded Directive instructions.

6   Click **OK** to return to the main page on the device.

7   Wait a few minutes and check the recipient address or destination to confirm delivery.
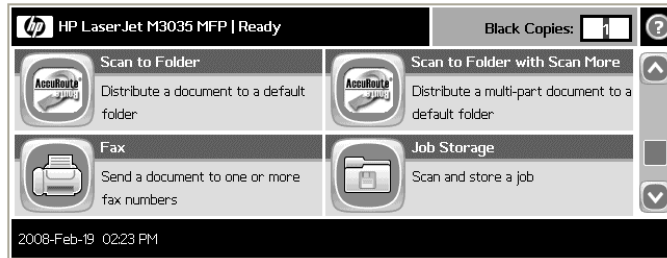
If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to Section 8: Troubleshooting.

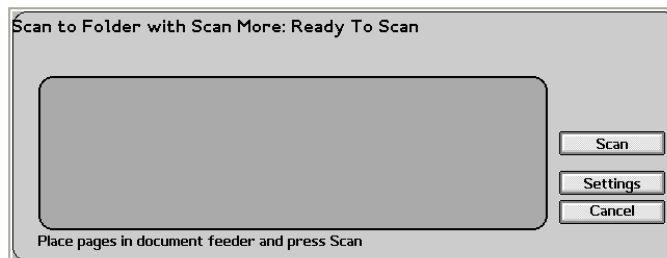# Testing the Scan to Folder with Scan More feature

To test the Scan to Folder with Scan More feature:

1   Assemble a test document and go to the device. The main screen looks like this:

2   Load the document into the document feeder or place the first page on the exposure glass. For documents that are larger than the capacity of the document feeder, load the first part of the document into the document feeder.

3   Press **SCAN TO FOLDER WITH SCAN MORE**. (If this feature is not visible, use the scroll bar to find it.)
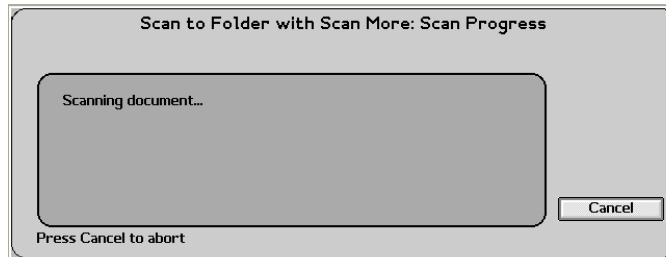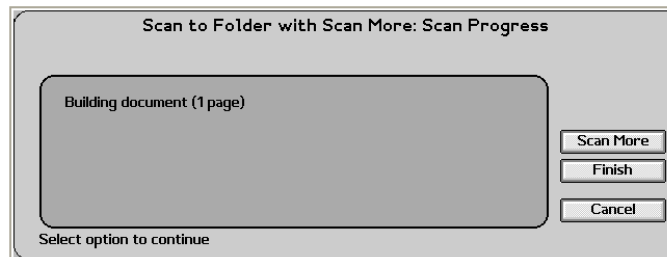
    You see the Ready to Scan message.

    You can do the following:

a   To start the scan job, click **SCAN**.

b   To update the scan attributes, click **SETTINGS**.

c   To cancel the job and go back to the main page, click **CANCEL**.

4   Click **SCAN**.

The scan job starts. You get a progress indicator telling you the number of the page that is being scanned.

```
Scan to Folder with Scan More: Scan Progress

    Scanning document...

                                          [ Cancel ]

Press Cancel to abort
```

5   You are prompted to choose from the options in the following screen.

```
Scan to Folder with Scan More: Scan Progress

    Building document (1 page)

                                      [ Scan More ]
                                      [  Finish   ]
                                      [  Cancel   ]
Select option to continue
```

   a   To continue scanning, click **SCAN MORE**.

   b   To finish the scan job, click **FINISH**.

   c   To abort the scan job, click **CANCEL**.

6   To continue scanning, load the rest of the document into the document feeder or place the next page on the exposure glass, and then press **SCAN MORE**.

7   Continue to scan more till you have finished scanning all the pages in the document.

8   Click **FINISH**.

The document is transferred to the server where it will be processed as per the Embedded Directive instructions.

9   Click **OK** to return to the main screen on the device.

10   Wait a few minutes and check the recipient address or destination to confirm delivery.

If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to Section 8: Troubleshooting.

Section 8: Troubleshooting

This section includes:

Complete these procedures in the order they appear. If you cannot resolve the issue, contact Omtool. (Go to Omtool support and sales on the inside front cover.)

Detecting workflow issues

After a document has been scanned on the device, the document should arrive at its destination momentarily but can take up to several minutes when the server workload is high. If a document does not arrive at its destination within a reasonable period of time, begin troubleshooting the environment. Omtool recommends troubleshooting the workflow in reverse order because this is the easiest way to troubleshoot the setup on your own.

Figure 8-A   **Troubleshooting the workflow in reverse order**
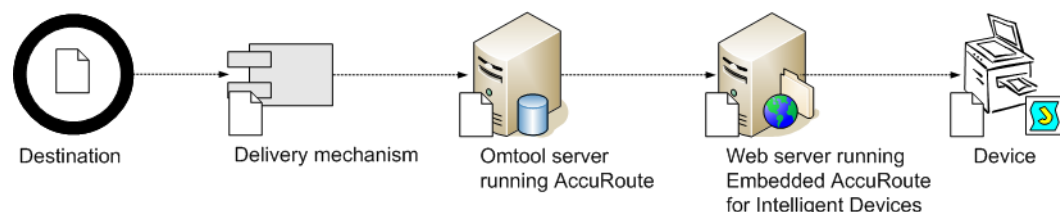
The easiest way to troubleshoot a workflow issue is to follow the document through the workflow in reverse order. When a document does not arrive at its destination, troubleshooting starts with the delivery mechanism such as the mail server or DMS application, and then continues to the Omtool server, the web server, and the device.

To begin troubleshooting, go to Troubleshooting the delivery mechanism (8-2).

Troubleshooting the delivery mechanism

When the Omtool server finishes processing a message, an outbound connector routes the message directly to its destination or passes the message onto a delivery agent. If a delivery agent such as a mail server or DMS application is involved in the delivery process, do some basic troubleshooting on the delivery agent. If the delivery agent is functioning correctly, troubleshoot the message on the Omtool server. Continue to Troubleshooting the message on the Omtool server.

# Troubleshooting the message on the Omtool server

There are two important questions that can be resolved when troubleshooting a message on the Omtool server:

- Was the message submitted to the Omtool server?
- Assuming the message was submitted to the Omtool server, what caused the delivery failure? The state and status of the message, along with details in the message journal, provide some important clues.

Start troubleshooting by trying to locate the message on the Omtool server.

To locate the message on the Omtool server:

1   Start the Administrator.

2   Go to **OMTOOL SERVER ADMINISTRATOR > [SERVERNAME] > MESSAGES**.

3   Look for the message in the In Process queue:

a   Click **IN PROCESS**.

b   View **ALL ITEMS**.
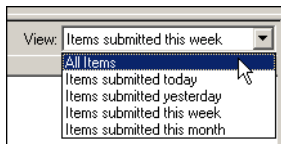
c   Sort all items by the date submitted.
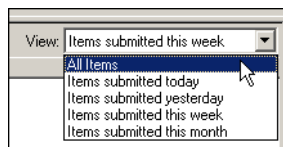
d Look for the message.

- **Message found** - View the message journal to determine the current state and status of the message. Then monitor the components and confirm that the message is moving through the processing queues on the Omtool server. If the Omtool server stops processing the message (for example, the message seems to be stuck in a processing queue), restart all the Omtool services.
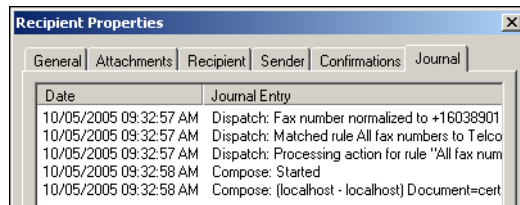
- **Message not found** - Go to step 4 and look for the message in the History queue.

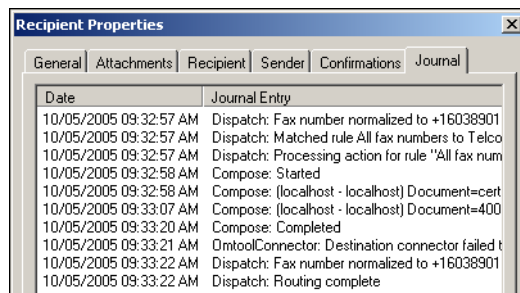**4** Look for the message in the History queue:

a Click **HISTORY**.

b View **ALL ITEMS**.

c Sort all items by the date submitted.

d Look for the message.

- **Message found** - View the message journal to determine the cause of the failure.

If the message failed, correct the issue and send the message again. Contact Omtool if you are unable to resolve the issue. (Go to <u>Omtool support and sales</u> on the inside front cover.)

If the journal states that Omtool server delivered the message but it still has not arrived at its destination, this indicates that the Omtool server transferred the message to the delivery agent successfully. Do some advanced troubleshooting on the delivery agent to determine why the message is not being delivered to its destination. Contact Omtool if you are unable to resolve the issue. (Go to <u>Omtool support and sales</u> on the inside front cover.)

- **Message not found** - Continue to <u>Troubleshooting the web server</u>.

Troubleshooting the web server

The Embedded AccuRoute for Intelligent Devices installation guide has instructions on troubleshooting the web server. Go to Related documentation on 1-8.

If you cannot identify any issues with the web server, troubleshoot the device. Continue to Troubleshooting the multifunction device.

Troubleshooting the multifunction device

After troubleshooting all other components in the workflow, troubleshoot the device. Consult the HP documentation.

Troubleshooting installation error - files of type .properties or .xml are not loaded

You are installing the Omtool Chailet to the device and get this error during the installation process.
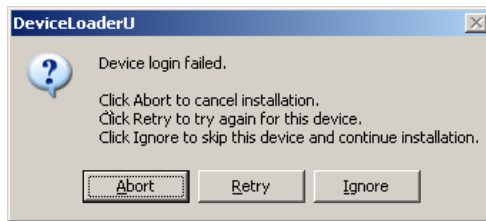

This is happening because your web server running Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) is installed on a Windows 2003 server and IIS v6.0 does not serve unknown MIME types.

The solution is to set the MIME type setting on your system to allow .properties and .xml extensions. For instructions, see Setting the MIME Type Value (4-1)

Troubleshooting reboot error after upgrading device firmware and installing Chailet

After upgrading device firmware, you install Omtool Chailet on a device. When the device reboots at the end of the install you get the following reboot error.
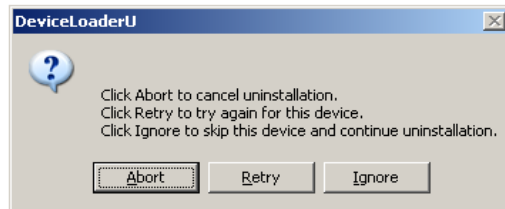
The solution is to perform a full NVRM INIT

Note   You must perform an NVRM INIT every time you upgrade your device firmware.

To perform a full NVRAM INIT:

1   Switch the device off and then turn it on.

2   As soon as the device beings to count memory, press and hold **3** on the control panel.

3   When all the three status lights are on release the button.

       Steps between 2 and 3 take approximately 10 seconds.

4   Press **9** on the control panel.

5   Press **START**.

       The display reads the FULL NVRAM INIT.

6   Press **6** on the control panel. The display panel reads **CONTINUING BOOT SEQUENCE**.

7   Wait for the device to boot.

Troubleshooting timeout when scanning a large number of pages

In order to scan a large of number of pages, you must configure the time out settings in the configuration xml file.

To increase inactivity timeout setting

1   Navigate to the **Scripts** directory:

   ▸ If you have a AccuRoute v2.1 server running, it is located in **\\PROGRAM FILES\COMMON FILES\OMTOOL\WEBAPI\SCRIPTS**

   ▸ If you have an AccuRoute v2.2 or later server running, it is located in **\\PROGRAM FILES\OMTOOL\OMTOOL SERVER\ WEBAPI\OMTOOLWEBAPI\SCRIPTS**

2   Open `OmISAPIUHP.xml` for editing.

3   Go to the `<Timeout>` node. By default it is set to `60` seconds.

4   Increase the time to `300` seconds.

5   Go to the `<PollForScanCount>` node that is specified under the `<ChaiOptions>` node. By default it is set to `10`.

6   Increase the poll time to `40`.

7   Save your changes.

8   Start World Wide Web Publishing service.

9   Restart the device (that is switch it off and then on).

Appendix: Authentication options

This section includes:

Choosing an authentication method

The Omtool chailet must be able to authenticate the device user when any of the following features are used:

- Personal Distributions
- MyAccuRoute
- MyAccuRoute with Scan More

Authentication can be using any one of the following methods

- Omtool Authentication Agent
- LDAP authentication

Omtool Authentication Agent require the e-mail address of the device user or a user PIN that identifies the user. LDAP Authentication requires the user name and password of a user in the Active Directory global catalog or Domino Directory.

Appendix:

Omtool Authentication Agent

You set up Omtool Authentication Agent as the method of authentication at the time of installing Embedded AccuRoute for HP Chai. Refer to Installation (3-1) for more information.

When you choose Omtool Authentication Agent, and the device user is prompted to log into the device, the user can either enter an email address or a user PIN depending upon how you set up authentication.

- E-mail

When you set up email as the authentication method, the Omtool chailet uses the e-mail address to request information from the Omtool server, such as a list of the user's personal distributions. When the scan is submitted to the Omtool server as a message, the e-mail address is used to set the property prOriginator. This property identifies the e-mail address of the message sender.

Only the e-mail address is required to identify the device user. This method is less secure than the alternative but can be used effectively in environments where administrative assistants or proxies assist with document distribution or in environments where strict security measures are not required.

- User Pin Authentication

Device users can also use a User ID/PIN to access AccuRoute scanning capabilities from the device. The User ID/PIN can consist of numeric or alpha numeric characters. When a user enters the ID/PIN, it is validated against a field in the Active Directory maintained by his company or an xml file that is maintained by the user or his department.

Note   The AccuRoute server must be configured with the ability to perform an LDAP lookup to the Active Directory.

This method is more secure than using non-authenticated email. The Omtool Authentication Agent uses the user PIN and password to initiate a lookup. The lookup validates the user and returns the user's data. Then the Omtool chailet uses the e-mail address to request information from the Omtool server, such as a list of the user's personal distributions. When the scan is submitted to the Omtool server as a message, the user data is used to set the property prOriginator.

You set up Omtool Authentication Agent as you method of authentication at the time of installing Embedded AccuRoute for HP Chai. Refer to Installation (3-1) for more information.

Configuring Omtool Authentication Agent on the device

To configure Omtool Authentication Agent on the device:

1 Start the browser and go to the Embedded Web Server for the device.

The Embedded Web Server is the web-based management application for the HP device. It is located at http://[device location]. The device location can be the IP address or host name of the device. (The host name must be formatted as hostname:port. For more information, consult the HP documentation.)

2 Log in to the Embedded Web Server. All options become available.

3 Go the **SETTINGS** tab and click **AUTHENTICATION MANAGER**.

4 Locate the following AccuRoute functions:

❑ Personal Distributions

❑ MyAccuRoute

❑ MyAccuRoute with Scan More

The list shows the options that are installed with Embedded AccuRoute for HP Chai, so it can contain all, some, or none of these functions.

5   For each of the features listed above, click on the drop down menu.

6   Select **OMTOOL AGENT** as the authentication method for each scanning feature that requires user login.

7   Click **APPLY**.

8   Restart the World Wide Web Publishing Service on the web server if the device was previously running the Omtool chailet with a different authentication configuration.

9   Continue to Section 5: Required configuration on the server.

Configuring User PIN Identification

If you want to use User PIN Authentication, apply Patch 12895 after installing Embedded AccuRoute for HP Chai. Patch 12895 is available as a separate download for purchase. For information on how purchase the patch, contact Omtool sales.

Applying Patch 12895

To download patch 12895

1   Go to http://www.omtool.com/support.

2   Log in using your customer number issued by Omtool when you purchased Patch 12895.

3   Locate the patch in the **DOWNLOADS AND DOCS** section.

4   Download the patch and save it to a location on the system running the Embedded AccuRoute for Intelligent Devices(Omtool ISAPI web server extension).

To apply the patch:

Copy the patch files to the following location:

▸   If you are running AccuRoute v2.2 or later, copy the patch files to:
    C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\WEBAPI\OMTOOLWEBAPI\SCRIPTS

▸   If you are running AccuRoute v2.1, copy the patch files to:
    C:\PROGRAM FILES\COMMON FILES\OMTOOL\WEBAPI\SCRIPTS

Configuring OmISAPIUHP.xml manually for User PIN Identification

Configure the `OmISAPIUHP.xml` before device users can use the User PIN Identification feature.

To configure the omISAPIUHP.xml, follow these steps:

1   Open `OmISAPIUHP.xml` for editing.

▸   If you are running AccuRoute v2.2 or later, navigate to **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\WEBAPI\OMTOOLWEBAPI\SCRIPTS** and open the xml file.

▸   If you have AccuRoute v2.1, navigate to **C:\PROGRAM FILES\COMMON FILES\WEBAPI\SCRIPTS** and open the xml file.

2   Make the changes to each of the nodes following the instructions in the table.

> *Note*   To use User PIN Identification feature, the validation type set during Embedded AccuRoute for HP Chai installation must be Active Directory. See Step 8 of Installing Embedded AccuRoute for HP Chai on a remote web server (3-9)

Table 1. Explanation for the xml nodes that must be configured for the User PIN Identification feature

XML Node	Explanation
\<Label 1\>	Enter an appropriate label for the user PIN Identification prompt. Examples are "Employee ID" or "Employee PIN". **Note: There is a character limit to the label value.**
\<Label 2\>	Enter an appropriate label for the password prompt, if necessary.
\<UserIDMask\>	Enter the mask value that applies to the ID/PIN that device users will use. The user ID/PIN entered by the device user is validated only if it matches the mask pattern. For example, say a UserID mask is A[0-9][0-9]. In this example, all valid user ID should start with "A" followed by two numeric digits. In this case if the device user enters an ID of A8, it would not be validated and the ID contains too few digits.

Table 1. Explanation for the xml nodes that must be configured for the User PIN Identification feature

XML Node	Explanation
<SearchBase>	Enter the full domain name in the LDAP SEARCHBASE field. For example, if your full domain name is test.mycompany.com, enter dc=test, dc=mycompany,dc=com
<AttributeName>	Enter the actual attribute name that is defined in the Active Directory. If this attribute prompts for password, you must set <Label2> that contains the value for the password prompt. Examples are employeeID, TimeKeeper ID.

3   After you finish making necessary change, save the file.

4   Restart the World Wide Web Publishing service.

LDAP Authentication

When you choose LDAP Authentication, the user is prompted to enter an e-mail username and password. The HP Authentication Manager uses the login credentials to initiate a lookup. The lookup validates the user and returns the user's e-mail address. Then the Omtool chailet uses the e-mail address to request information from the Omtool server, such as a list of the user's personal distributions. When the scan is submitted to the Omtool server as a message, the e-mail address is used to set the property prOriginator.

Both the e-mail username and password are required to identify the device user, and the credentials are validated via LDAP authentication. This method provides increased security.

For information on configuring LDAP Authentication, consult HP documentation: http://ftp.hp.com/pub/printers/mfps/ews_help/help/en/help_LdapAuth2.html

The following figures represent an example of an LDAP Authentication configuration for Active Directory (Go to Figure 9-A Example of an LDAP Authentication configuration for Active Directory on 9-7.) and the LDAP Authentication settings qualified with Lotus Notes (Go to Figure 9-B LDAP Authentication configuration qualified with Lotus Notes on 9-7.).

Figure 9-A   **Example of an LDAP Authentication configuration for Active Directory**

LDAP Authentication binds to the LDAP server with the device user's common name (CN). The search is conducted within the root ou=engineering,cn=users,dc=hp,dc=com using the device user's common name (CN). The return value is the user's e-mail address (mail) and name (displayName).

Figure 9-B   **LDAP Authentication configuration qualified with Lotus Notes**

LDAP Authentication binds to the LDAP server with an administrator's common name (CN) and password. The search is conducted using the specified administrator's credentials. The return value is the user's e-mail address (mail) and name (CN).

Appendix: