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

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Section 1: Introduction

This guide contains instructions on deploying Embedded AccuRoute for HP OXP to multifunction devices running OXP SDK v1.4.2. It is written for systems administrators with detailed knowledge of the Omtool server and the HP device.

This section includes:

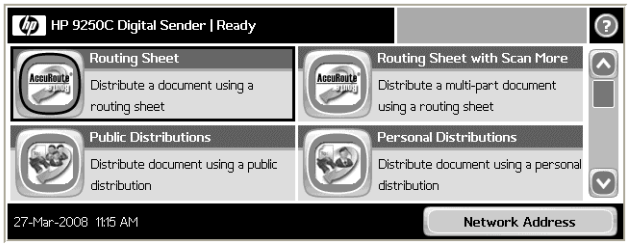
Embedded AccuRoute for HP OXP

Embedded AccuRoute for HP OXP brings the versatile document routing capabilities of AccuRoute® to supported HP devices running OXP SDK v1.4.2. These capabilities are founded on Omtool's Embedded Directive technology.

Embedded AccuRoute for HP OXP runs on OXP (Open Extensibility platform), an ASP.NET layer sitting between the HP device and the AccuRoute server. It communicates between the OXP SDK v1.4.2 installed on the HP device and the AccuRoute server via the Embedded AccuRoute for Intelligent devices application.

In the main menu, Embedded AccuRoute for HP OXP presents the device user with several AccuRoute scanning features.

Figure 1-A **AccuRoute scanning features on the HP device running Embedded AccuRoute for HP OXP**



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 6: Testing. This section shows a complete screen sequence for each feature.)

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

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 and delivers the document to the AccuRoute server via HTTP / HTTPs protocol. The server decodes the Embedded Directives and distributes the document to the intended recipient.	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 and delivers the document to the AccuRoute server via HTTP / HTTPs protocol. The server decodes the Embedded Directives and distributes the document to the intended recipient.	Yes	
MyAccuRoute	The user selects MyAccuRoute and logs in to the device. The device scans and delivers the document to the AccuRoute server (via FHTTP / HTTPs protocol) where it is processed using the device user's personal MyAccuRoute directive and distributed to the intended recipients. Or the scanned document is emailed to the sender (the default).	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 and delivers the document to the AccuRoute server via HTTP / HTTPs protocol. The AccuRoute server then decodes the Embedded Directive and distributes the document to the intended recipients.	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 device scans and delivers the document to the AccuRoute folder via HTTP / HTTPs protocol. The AccuRoute server picks up the scanned document from the network folder, processes it and delivers it to the intended 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.		

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

Feature	Description	Login required	Notes
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 and delivers the document to the AccuRoute server via HTTP / HTTPs protocol. The AccuRoute server sends the fax to the intended recipients.	No	

Main components of the environment

The Embedded AccuRoute for HP OXP environment consists of the four components listed below.

- **AccuRoute server** - AccuRoute v2.2 or later

  The AccuRoute server is the main back end server processing and routing documents. For instructions on installing AccuRoute server, consult the installation guide. See Related documentation (1-8) for links to the server installation guide.

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

  - **Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension)**

  This is an ISAPI layer providing communication between the AccuRoute server and the intelligent device.

Note AccuRoute v2.2/v2.3 installs the AccuRoute Intelligent Device Client v2.1.1 as part of the server install. No separate installation is required.
You can use the same system for the AccuRoute server and the web server.

- **Embedded AccuRoute for HP OXP**- The instructions for installing Embedded AccuRoute for HP OXP are in this guide.
- **HP Device** - For a list of supported devices with minimum firmware requirements, go to Supported devices (2-1)

Installation components

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

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

Component	Location	Function
Embedded AccuRoute for HP OXP	network folder where you downloaded the setup files.	The setup contains the setup.exe file. Use this file to install the Embedded AccuRoute for HP OXP.
Embedded AccuRoute for HP OXP Configuration file	…\Program Files\omtool\HPOXP\Configuration\configuration.xml	This XML file is installed in system running the Embedded AccuRoute for HP OXP. This file supplies the configuration data to the device. It is configured automatically by the setup.

Document workflows

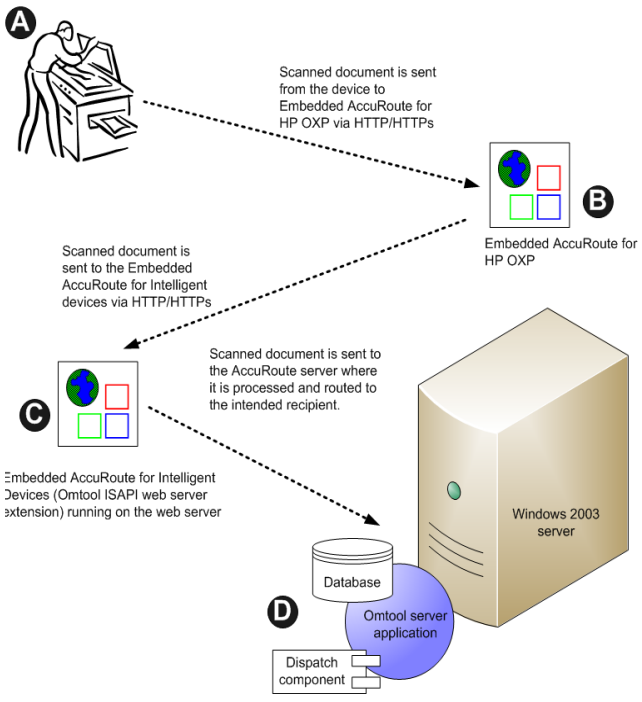
The workflow that moves a document from the device to its final destination involves the user, the device, the Embedded AccuRoute for HP OXP, Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension), and the Omtool server. An understanding of this workflow can be helpful in troubleshooting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

In its most basic workflow, when a device user scans a document, the device submits the document to Embedded AccuRoute for HP OXP via HTTP / HTTPs protocol. The Embedded AccuRoute for HP OXP then routes the document to the AccuRoute server via HTTP / HTTPs protocol. The Dispatch components applies rules to the message and AccuRoute server processes the message and routes them to the intended recipients.

The following workflow applies to the features Fax, Routing Sheet, Routing Sheet with Scan More, Scan to Folder, Scan to Folder with Scan More, MyAccuRoute and MyAccuRoute with Scan More.

Important For MyAccuRoute and MyAccuRoute with Scan More features, the device user must authenticate himself at the device using the configured authentication type. See Configuring authentication (4-10) for more information on authentication.

Figure 1-B **Workflow for Fax, Routing Sheet, Routing Sheet with Scan More, Scan to Folder, Scan to Folder with Scan More, MyAccuRoute and MyAccuRoute with Scan More**



A- The user selects an AccuRoute scanning feature and scans a document. **B** -The device delivers the document to Embedded AccuRoute for HP OXP via HTTP/HTTPs protocol. **C** - Embedded AccuRoute for HP OXP sends the document to Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) via HTTP/HTTPs protocol which in turn routes the document to the AccuRoute

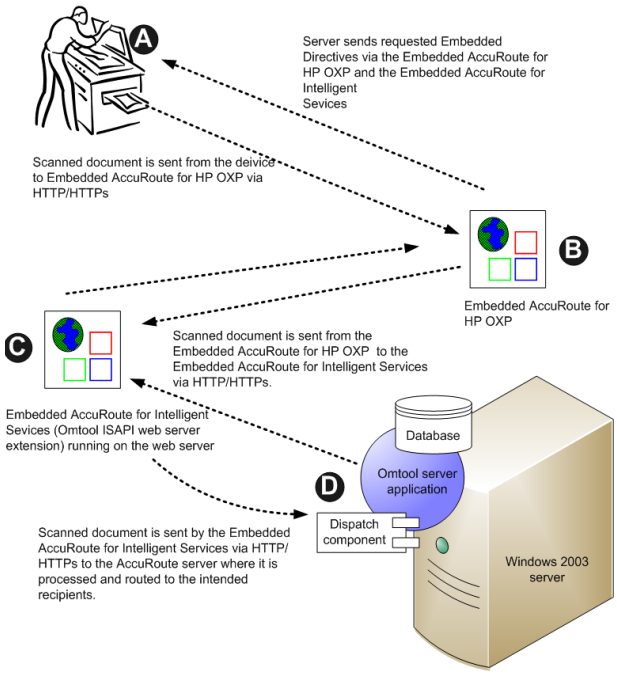
server. **D** - The Dispatch component applies rules to the message, and the server processes the message accordingly.

For Public and Personal Distributions when a user begins a scan session, the device requests the Embedded AccuRoute for HP OXP to retrieve Embedded Directives.

Note For Personal Distributions, the device user must authenticate himself at the device using the configured authentication type. See Configuring authentication (4-10) for more information on authentication.

The Embedded AccuRoute for HP OXP then 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 Embedded AccuRoute for HP OXP. As soon as the Embedded AccuRoute for HP OXP returns the data to the device, the basic workflow resumes.

Figure 1-C **Workflow for Personal Distributions and Public Distributions**



A- The user selects Personal or Public Distribution feature. (If the user chooses Personal Distribution, he logs into the device.) The device requests the list of Embedded Directives from the server. The AccuRoute server returns the requested data. User selects an Embedded Directive from the list and scans document. **B** - Device delivers the document to the Embedded AccuRoute for HP OXP via HTTP or HTTPs protocol. **C**- Embedded AccuRoute for HP OXP sends the document to Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) via HTTP/HTTPs protocol

which in turn routes the document to the AccuRoute server. **D** - The Dispatch component applies rules to the message, and the server processes the message accordingly.

Deployment summary

To deploy Embedded AccuRoute for HP OXP:

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

Note If you are planning to use HTTPs protocol, you must create a CA certificate before installing Embedded AccuRoute for HP OXP.

2. Install Embedded AccuRoute for HP OXP on the web server. (Section 3: Installation)
3. Configure the embedded web server of the device. (Section 4: Required configuration)
4. Configure the Omtool server. (Section 5: Required configuration on the server)
5. Configure optional capabilities. (Section 8: Optional configuration)
6. Test the AccuRoute scanning features on the device. (Section 6: Testing)
7. Troubleshoot the setup if necessary. (Section 7: Troubleshooting)

Custom configuration

By default, Embedded AccuRoute for HP OXP supports one Embedded AccuRoute for HP OXP 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 HP setup.

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

1. Remove Embedded AccuRoute for HP OXP from the web server. (Go to Uninstalling Embedded AccuRoute for HP OXP on 3-6.)
2. Run the Embedded AccuRoute for HP setup again using the desired values. (Go to Section 3: Installation.)
3. Configure the device. (Go to Section 4: Required configuration.)

Customizing Embedded AccuRoute for HP OXP

Embedded AccuRoute for HP OXP can be customized to:

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

  Groups can be set up with assistance from Omtool consulting services. To set up groups, contact Omtool sales.
- Use custom values for button names and icons, the number of Embedded Directives displayed on the device.
- Override native settings on the device.

For information and ideas on how you can customize Embedded AccuRoute for HP OXP, 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/accuroutev22serverinstallguide.pdf

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

- **Administrator help** - http://www.omtool.com/documentation/omtoolserver/v35/admin/

AccuRoute Desktop documentation

- **AccuRoute Desktop installation guide** - http://www.omtool.com/documentation/accuroute/v22/accuroutedesktop/accuroutedesktopV22installguide.pdf
- **AccuRoute Desktop user guide** - http://www.omtool.com/documentation/accuroute/v22/accuroutedesktop/accuroutedesktopv22userguide.pdf

Web Client documentation

- **Omtool Web Client installation guide** (relevant for AccuRoute v2.3 only) - http://www.omtool.com/documentation/omtoolserver/v22/webclient/omtoolwebclientinstallguide.pdf
- **AccuRoute Web Client installation guide** (relevant for AccuRoute v2.3 only) - http://www.omtool.com/documentation/AccuRoute/v23/AccuRouteWebClient/AccuRouteWebClientV20InstallConfigurationGuide.pdf

Embedded AccuRoute for Intelligent Devices documentation

AccuRoute v2.2/v2.3 installs the AccuRoute Intelligent Device Client v2.1.1 as part of the server install. For information on the intelligent client, consult the AccuRoute server installation guide (see AccuRoute server documentation.)

Embedded AccuRoute for HP OXP 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/HPOXP/EmbeddedAccuRouteforHPOXPV1QuickStartGuide.pdf

The quick start guide contains instructions for the following 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

The following table lists the HP devices that were tested in the Omtool laboratory to qualify Embedded AccuRoute for HP OXP v1.3 for OXP SDK v1.4.2. For each device, the device firmware versions used are listed as well.

Table 2-A Embedded AccuRoute for HP OXP v1.3 for OXP SDK v1.4.2 device firmware matrix

Device group	Device model	Firmware version
Group 10	HP LaserJet 4730 mfp	46.211.2
Group 20	HP LaserJet M4345	48.081.2
Group 30	HP Color LaserJet CM8060	75.020.0
Group 40	HP Color LaserJet CM6040	52.031.1
Group 50	HP Color LaserJet CM3530	53.011.2

Omtool qualified Embedded AccuRoute for HP OXP in the following configurations.

Group 10 devices

- HP LaserJet 4345 mfp series with minimum firmware version 9.091.4
- HP LaserJet 4730 mfp series with minimum firmware version 46.211.2
- HP LaserJet 9040/9050 mfp series with minimum firmware version 8.091.3
- HP Digital Sender 9200c with minimum firmware version 9.091.4
- HP Color LaserJet 9500 mfp with minimum firmware version 8.091.3

Memory requirements

All Group 10 devices need additional RAM (beyond their base configuration) in order to install the HP OXPd .jar file.

Here is a list of devices and their memory requirements.

- HP LaserJet 4345 mfp series - 384 MB
- HP LaserJet 4730 mfp series - 384 MB
- HP LaserJet 9040/9050 mfp series - 384 MB
- HP Digital Sender 9200c - 384 MB
- HP Color LaserJet 9500 mfp - 512 MB

Group 20 devices

- HP LaserJet M3035 mfp with minimum firmware version 48.041.3
- HP LaserJet M4345 mfp with minimum firmware version 48.081.2
- HP LaserJet M5035 mfp with minimum firmware version 48.081.2
- HP Color LaserJet CM4730 mfp with minimum firmware version 50.021.4
- HP Digital Sender 9250c series with minimum firmware version 48.051.7

Group 30 devices

- HP Color LaserJet CM8050 mfp with minimum firmware version 75.020.0
- HP Color LaserJet CM8060 mfp with minimum firmware version 75.020.0

Note By default, Group 30 devices have the OXP SDK loaded on them. Therefore, if you are using a Group 30 device, no separate download and install of the OXP SDK is necessary.

Group 40 devices

- HP Color LaserJet CM6030 mfp with minimum firmware version 51.021.5
- HP Color LaserJet CM6040 mfp with minimum firmware version 52.031.1

Note Omtool Authentication Agent is not supported for Group 40 devices.

Group 50 devices

- HP Color LaserJet CM3530 mfp with minimum firmware version 53.011.2

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

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.

Server requirements

Embedded AccuRoute for HP OXP requires:

- ❒ AccuRoute v2.2 or later (must be fax-enabled to support fax-based features)
- ❒ web server running Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension)

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

- ❒ Patch 12154 (for AccuRoute v2.2 only) - You must install this patch before you can configure or use prompts. For installation instructions, see Installing patch 12154 (8-4)

Important This patch is not needed if you are using AccuRoute v2.3

- ❒ ASP.NET 2.0
- ❒ Microsoft Visual C++ 2005 redistributable package available in http://www.omtool.com/documentation/accuroute/v22/accuroutedesktop/accuroutedesktopV22installguide.pdf

Note about requirements for User PIN Identification feature

For information on how to configure and use this feature, contact Customer Service using any of the following methods:

- **Phone**: 888-303-8098 (toll-free in the US)
- **Fax**: 978-659-1301
- **E-mail**: customerservice@omtool.com or support@omtool.com

Installation requirements

The installation procedure requires:

- ❒ Unique e-mail address for the Public Distributions feature
- ❒ Filescan connector for the Scan to Folder and Scan to Folder with Scan More features

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

Requirements for HTTPs protocol communication

In order to use HTTPs protocol communication when sending documents from the device to the Accuroute server, you must create a CA Certificate using Microsoft Certificate Services and enable SSL. You must create this certificate before installing Embedded AccuRoute for HP OXP. For instructions on how to create the certificate and enable SSL, see Setting up a CA Certificate using Microsoft Certificate Services and enable SSL (9-1)

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 v2.2.2(or later) or to the Omtool 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 v2.2.2(or later) or to the Omtool 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 v2.2.2 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 Related documentation 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 v2.2.2(or later) or to the Omtool 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:

Complete these procedures in the order they appear.

Downloading Embedded AccuRoute for HP OXP

To download Embedded AccuRoute for HP setup

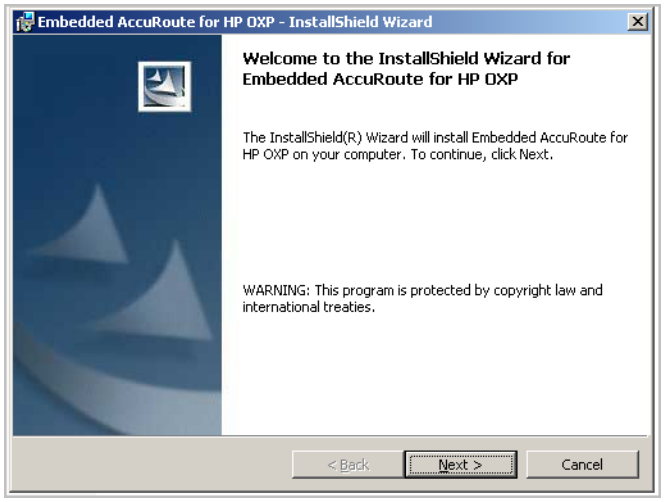
1. Go to http://www.omtool.com/support.
2. Log in using your customer number.
3. Locate the module in the **DOWNLOADS & DOCS** section.
4. Download the module and save it to a local drive.
5. Extract the files to a location on your AccuRoute server.
6. Continue to Installing Embedded AccuRoute for HP OXP.

Installing Embedded AccuRoute for HP OXP

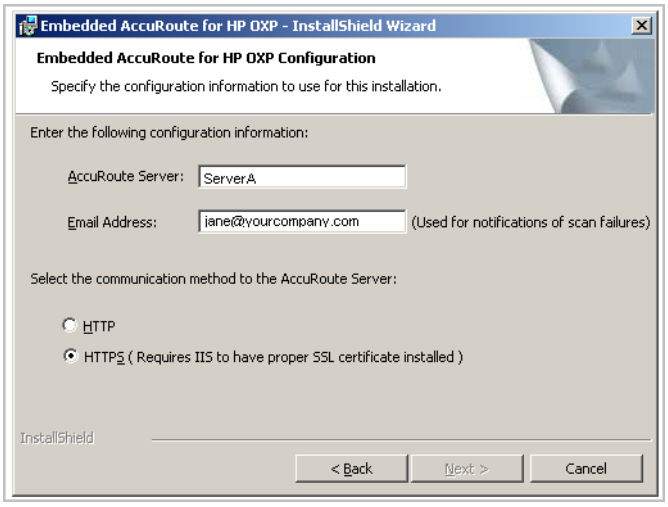
To install Embedded AccuRoute for HP OXP:

1. Logon to the system running the AccuRoute server using an account that belongs to the local Administrators group.
2. Navigate to the folder where you saved the setup files and run **SETUP.EXE**.

The InstallShield wizard opens and configures your system for installation and shows the **Welcome** message.



3 Click **NEXT**. The **HP OXP Configuration** page opens.



4 Enter the configuration information.

a **AccuRoute Server** - Enter the server name or its IP address.

b **Email Address** - Enter the email address of the person who should be notified in case of a job failure. Usually this is the server administrator.

c **Select the communication method to the AccuRoute server** - Select either HTTP (the default) or HTTPs as the communication method.

Important If you select HTTPs, you must create and enable the proper SSL certificate. For instructions, see Setting up a CA Certificate using Microsoft Certificate Services and enable SSL (9-1).

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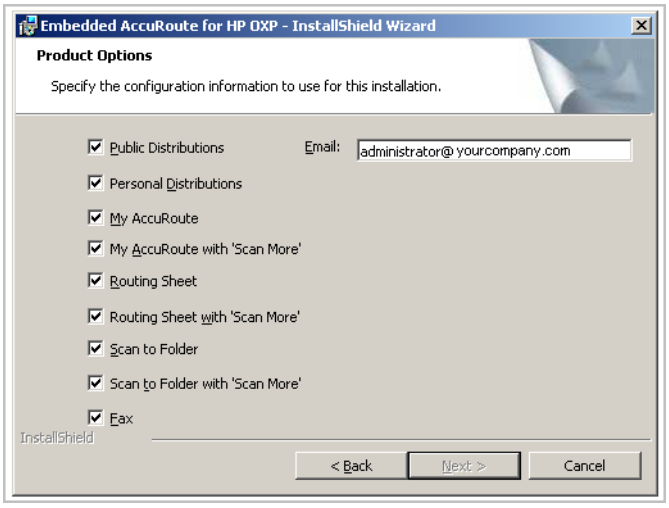
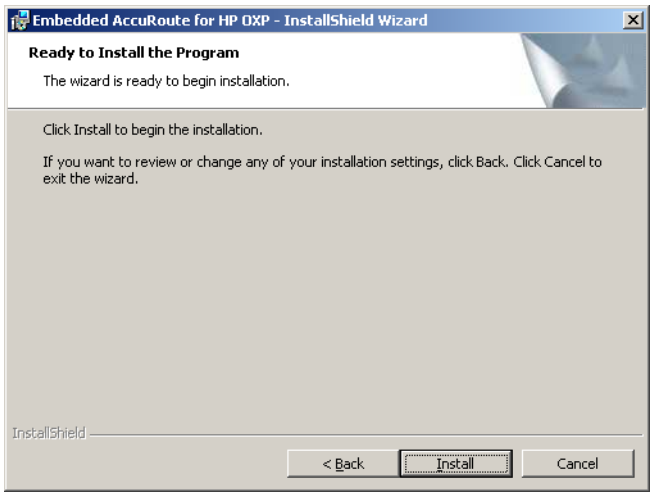
5 Click **NEXT**. The **Product Options** page opens.



6 Select the options for installation.

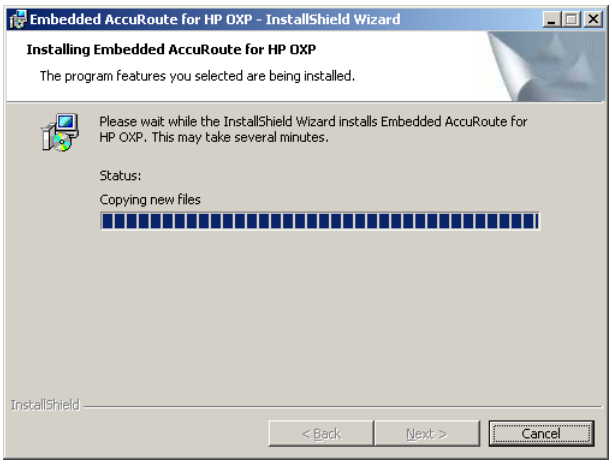
If you select the **Public Distributions** option, you must specify an email address. All Embedded Directives for this user that are marked published public are listed under Public Distribution options. If you do not specify the email address, InstallShield Wizard will not let you progress with the installation.

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

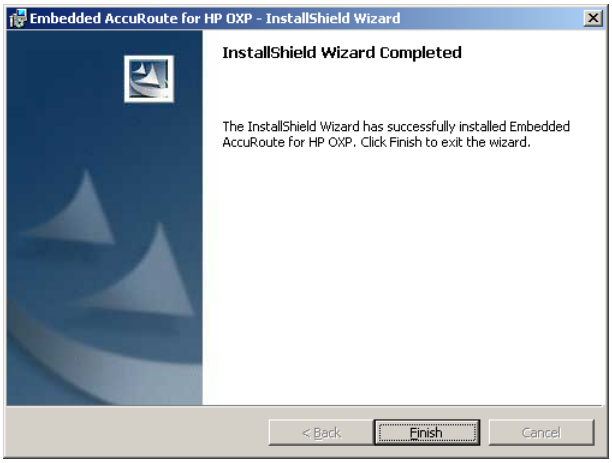


8 Click **INSTALL** to begin installation. The setup installs Embedded AccuRoute for HP OXP.

A progress window shows the status of the installation along with the specific components that are being installed.



When installation is complete, the InstallShield Wizard shows a message indicating that the installation is complete.



9 Click **FINISH**.

10 Continue to Required configuration (4-1).

Installing Embedded AccuRoute for HP OXP on a remote system

To install Embedded AccuRoute for HP OXP on a remote system:

1 Logon to the system where you want to install Embedded AccuRoute for HP OXP using an account that belongs to the local Administrators group.

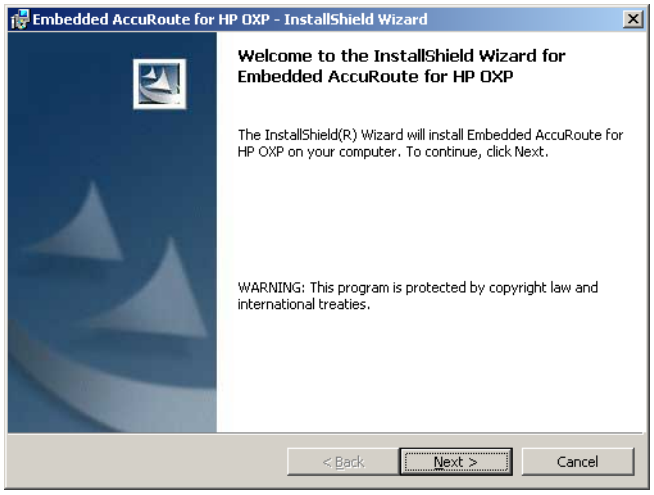
Note The system must be running Windows 2003 and must have Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) installed.

2 Navigate to the folder where you saved the setup files and run **SETUP.EXE**.

where the IP Address is the IP address on the AccuRoute server.

3 Run **SETUP.EXE**.

The InstallShield wizard opens and configures your system for installation and shows the **Welcome** message.



4 Follow the instructions in Installing Embedded AccuRoute for HP OXP (3-1) to complete the remote installation.

5 Continue to Required DCOM permissions (3-5)

Required DCOM permissions

When you install Embedded AccuRoute for HP OXP on a remote system, you must configure the following DCOM permissions on the AccuRoute server. Without this configuration, the AccuRoute server cannot communicate with the remote clients.

To configure DCOM permissions:

1. Logon to the AccuRoute server using an account that belongs to the local Administrators group.
1. Click **START > RUN**.
2. Enter `dcomcnfg`. Press **OK**.

   The **Component Services** console opens.
3. Expand **COMPONENT SERVICES > COMPUTERS > MYCOMPUTER**.
4. Select **PROPERTIES** to open the **Properties** page.
5. Click **COM SECURITY**.
6. Under **Access Permissions**, click **EDIT DEFAULT**.
7. Add **Anonymous_Logon** to the list of users and give him full permissions.
8. In the left pane, expand **DCOM CONFIG**.
9. Browse down to find the application **OmGFAPIServer**.
10. Right click the application and select **PROPERTIES** from the drop down menu.

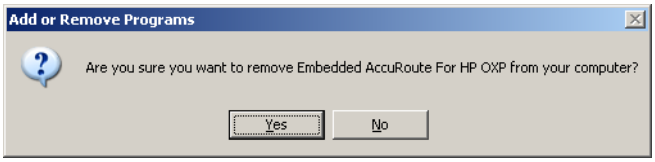
    The **Properties** page opens.
11. Click **SECURITY** to open the **Security** page.
12. For all three levels **Launch and activation permissions**, **Access Permissions** and **Configuration Permissions**, click **EDIT**.
13. Add **Anonymous_Logon** to the list of users and give him full permissions.

Uninstalling Embedded AccuRoute for HP OXP

To uninstall Embedded AccuRoute for HP OXP:

1. Go to the **CONTROL PANEL** and start **ADD OR REMOVE PROGRAMS**.
2. Select **EMBEDDED ACCUROUTE FOR HP OXP** and click **CHANGE/REMOVE**.

   You are prompted to confirm that you want to uninstall the software.



3. Click **YES**.

   Embedded AccuRoute for HP OXP is uninstalled from your system. A progress indicator shows the status of the uninstallation.

Section 4: Required configuration

This section includes:

Enabling ASP.NET

You must allow ASP.NET in order to view ".asp" pages. By default, the ASP.NET is prohibited.

To allow ASP.NET

1. Click **START > ADMINISTRATIVE TOOLS > INTERNET INFORMATION SERVICES (IIS) MANAGER**
2. In the left pane of the IIS Manager, expand the local computer and click on **Web Service Extensions**.

   The Web Service Extensions page opens listing all web service extensions, including ASP.NET.
3. Select **ASP.NET**.
4. Click **ALLOW**.

Downloading OXP SDK v1.4.2

Use the following procedure to download the HP OXPd v1.4.2.0.jar file from the Omtool website and copy the jar file to the appropriate location on the system running the Embedded AccuRoute for HP OXP client.

Important By default, Group 30 devices have the OXP SDK loaded on them. Therefore, if you are using a Group 30 device, you do not need to download and install OXP SDK v1.4.2. To determine if your device belongs to Group 30 or not, check Supported devices (2-1).

To download OXP SDK v1.4.2:

5 In the system where you installed Embedded AccuRoute for HP OXP v1.3, browse to **C:\PROGRAM FILES\OMTOOL\HPOXP\SDK**.

6 Create a folder and name it using the convention below:

- If you have a group 10 device. name it `Group 10`.
- If you have a group 20 device, name it `Group 20`.
- If you have a group 40 device name it `Group 40`.
- If you have a group 50 device name it `Group 50`.

7 Open Internet Explorer and go to http://www.omtool.com and click **SUPPORT > SUPPORT LOGIN**.

8 Login using your customer number.

9 On the navigation pane on the left, click **SUPPORT OPTIONS > DOWNLOADS & DOCS**.

10 Expand the AccuRoute drop down menu and under **Updates** locate the HP OXP v1.4.2 jar file (`1.4.2.0.jar`) with the Group associated with your device.

11 Click the download link to begin the download.

12 A Winzip file containing the jar file, an xml file and a text file opens.

13 Extract and save the files in the folder you created.

Installing the HP OXPd .jar file

Use the instructions in this section to install HP OXPd 1.4.2 jar file on the HP devices.

This file provides the platform for communication between the Embedded AccuRoute for HP OXP and the device. The OXPd .jar file can be installed using HP Web JetAdmin or the Package Loader.

Important By default, Group 30 devices have the OXP SDK loaded on them. Therefore, if you are using a Group 30 device, you do not need to download and install OXP SDK v1.4.2. To determine if your device belongs to Group 30 or not, check Supported devices (2-1).

Installing the OXPd .jar file using HP Web JetAdmin

For instructions on how to use the install the OXPd .jar file using HP Web JetAdmin, consult HP documentation.

Installing the OXPd .jar file using the Package Loader

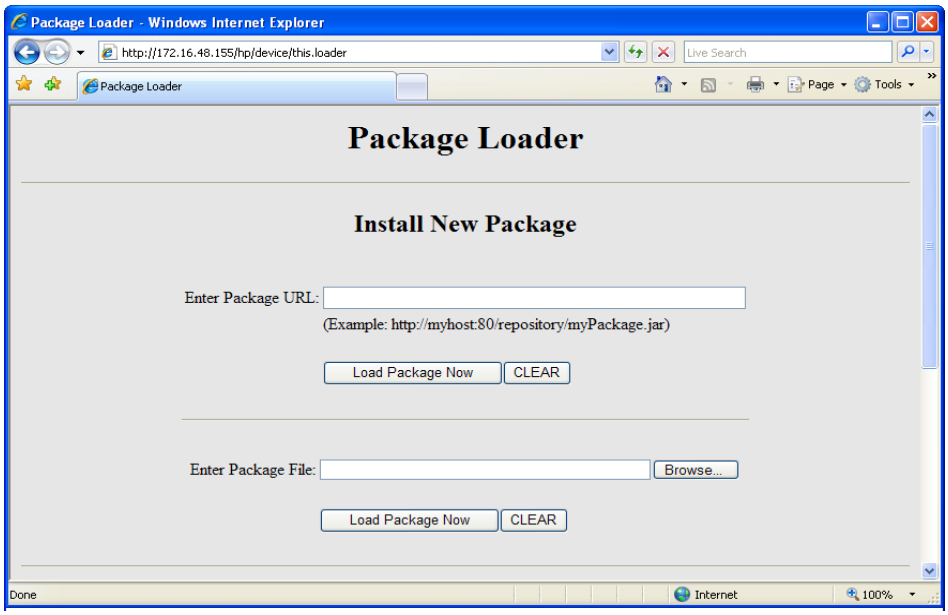
To install the OXPd .jar file using the Package Loader:

1 Logon to the system where you installed Embedded AccuRoute for HP OXP.

2 Open a web browser and enter the IP address of the device.

3 Click **LOG IN** and login to the device using the device administrator name and password.

4 Modify the URL to **http://[Device_IP_Address]/hp/device/this.loader**. The **Package Loader** page opens.



5 Click **BROWSE** beside **Enter Package File** text box.

6 Navigate to the system where you installed the Embedded AccuRoute for HP OXP software.

7 Go to **C:\PROGRAM FILES\OMTOOL\HPOXP\SDK**.

8 Select the jar file.

- If you have a group 10 device go to the Group 10 folder. Select the **hp-ext-10-oxpd.1.4.2.0.jar** file.
- If you have a group 20 device, go to the Group 20 folder. Select the **hp-ext-20-oxpd.1.4.2.0.jar** file.
- If you have a group 40 device go to the Group 40 folder. Select the **hp-ext-40-oxpd.1.4.2.0.jar** file.
- If you have a group 50 device go to the Group 50 folder. Select the **hp-ext-50-oxpd.1.4.2.0.jar** file.

9 Click **OPEN**.

10 Click **LOAD PACKAGE NOW**.

When installation is complete, you see a success message.

Important Wait for the device to reboot before you do any further configuration.

11 Continue to Configurations on the embedded web server (EWS) of the device.

Important If you are using a Group 50 device, you must modify the configuration.xml file before configuring the embedded web server (EWS) of the device. For configuration instructions, Modifying the configuration.xml file for Group 50 devices (4-4)

Modifying the configuration.xml file for Group 50 devices

To update the configuration file for Group 50 devices:

1. Login to the device where you installed Embedded AccuRoute for HP using an account that belongs to the Administrator's group.
2. Navigate to **C:\PROGRAM FILES\OMTOOL\HPOXP\CONFIGURATION** folder.
3. Open the `Configuration.xml` for editing.
4. Go to the `<Groups>` node and add the following information.

```
<Group name="Group50">
            <Device communitystring="public" />
    </Group>
```

5. Create a `<Group50>` node under `<Configurations>` node.
6. Copy the entire `<Group20>` node i.e. all the lines from `<Group20>` to `</Group20>` under `<Configurations>` node]:
7. Replace `Group20` with `Group50` as shown in Continue to Example: A..
8. Create a `<Group50>` node under `<FeatureSets>` node i.e. all the lines from `<Group20>` to `</Group20>` under `<FeatureSets>` node.
9. Replace `Group20` with `Group50` as shown in Continue to Example B.
10. Save your changes.
11. Open `Configuration.xml` in a web browser to confirm XML format.
12. Restart World Wide Publishing Service.

Example: A

```
<?xml version="1.0" encoding="utf-8" ?>
<Omtool version = "1.0">
<Configurations>
<Default>
...
...
</Default>
<Group50>
      <WebAPI>
```

```
      ...
      </WebAPI>
<AutomaticLogOut>0</AutomaticLogOut>
<Diagnostics>
...
</Diagnostics>
<Identity>Default</Identity>
<DeviceSettings>HPCHAI</DeviceSettings>
<Features>
<Feature>Group50</Feature>
</Features>
</Group50>
...
...
...
...
<Group20>
...
...
</ Group20>
<Group10>
...
...
</ Group10>
</Configurations>
...
...
</Omtool>
```

Example B

```
<?xml version="1.0" encoding="utf-8" ?>
<Omtool version = "1.0">
<Configurations>
</Configuration>
...
...
...
```

```
< FeatureSets>
<Default>
...
...
</Default>
<Group50>
<Feature id="Group" type="GroupED" enabled="true">
...
...
</Feature>
...
...
...
<Feature id="FolderScanMore" type="ScanToDataProvider"
enabled="false"> ...
...
...
...
</Feature>
</Group50>
...
...
...
...
<Group20>
...
...
</ Group20>
<Group10>
...
...
</ Group10>
</ FeatureSets>
...
...
</Omtool>
```

Configurations on the embedded web server (EWS) of the device

This section includes:

If you are modifying a Group 50 device, you must modify the configuration.xml file before you configure the embedded web server (EWS) of the device. For configuration instructions, see Continue to Modifying the configuration.xml file for Group 50 devices.

Modifying the OXPd Workflow

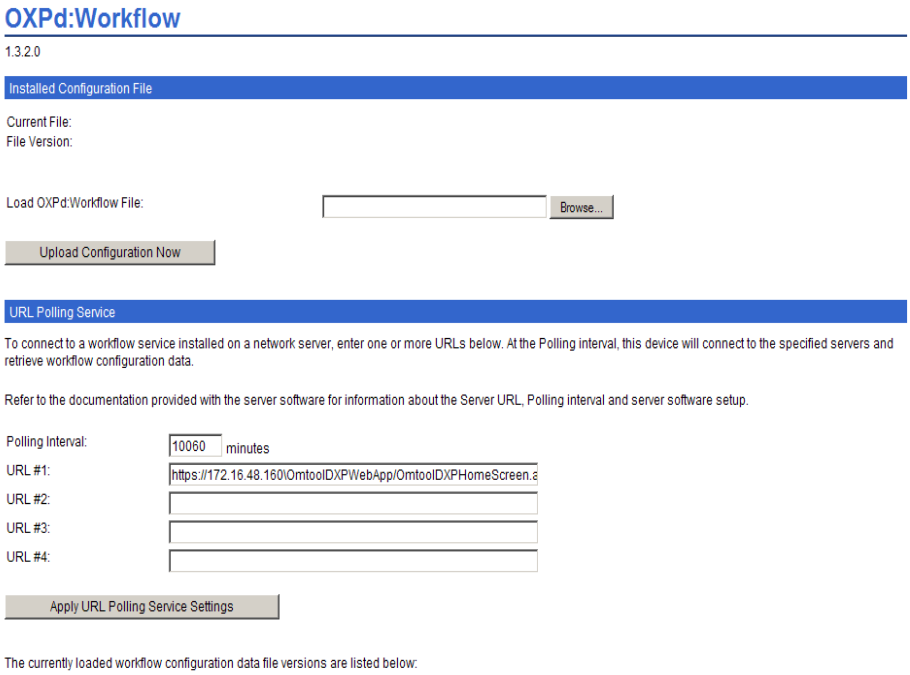
Modify the OXPd Workflow page and set the URL for the Embedded AccuRoute for HP OXP and the polling interval.

When you set the polling interval, the device connects to the system running the Embedded AccuRoute for HP OXP and retrieve the configuration data of the main AccuRoute page at regular interval. For more information on OXPd Workflow, consult the HP device manual.

To modify the OXPd Workflow:

1. Open a web browser and enter the IP address of the device.
2. Click **LOG IN** and login to the device using the device administrator name and password.
3. Open the **Digital Sending** page.

4 Select **OXPD:WORKFLOW** to open the **OXPD:WORKFLOW** page.



5 Make appropriate modifications in the **OXPd:Workflow** page.

a Under the **URL Polling Services**, enter the following URL in the **URL #1** text box:

For HTTP protocol communication:

`http://[IPAddress]/OmtoolDXPWebApp/OmtoolDXPHomeScreen.aspx?Group=[DeviceGroup]`

For HTTPs protocol communication:

`https://[IPAddress]/OmtoolDXPWebApp/OmtoolDXPHomeScreen.aspx?Group=[DeviceGroup]`

Use the following convention when entering the URL value:

- `[IPAddress]` is the IP address of the AccuRoute server where the Embedded AccuRoute for HP OXP is installed.
- `[DeviceGroup]` is the group to which the device belongs to. If your device is a group 10 device, enter "Group10". If your device is a group 20 device, enter "Group20. If your device is a group 30 device, enter "Group30". If your device is a group 40 device, enter "Group40". If your device is a group 50 device, enter "Group50".

For example, the URL value for a group 20 device will look like this:

https://111.1.1.1/OmtoolDXPWebApp/ OmtoolDXPHomeScreen.aspx?Group=Group20

b In the **Polling Interval** text box, set the polling interval.

Note It is recommended that you set a large value. If the polling interval is too frequent, it can interfere with and result in scan job failures.

c Click **Apply URL Polling Service Settings**.

⏭ You have to wait for the length of time you set in the polling interval for the AccuRoute buttons to load on the device. If you want to load the AccuRoute buttons immediately, see Loading the AccuRoute buttons using force update option (4-9)

The device now connects to the Embedded AccuRoute for HP OXP to retrieve the configuration data. The OXPd .jar file in the device then processes the data and loads the AccuRoute buttons.

Loading the AccuRoute buttons using force update option

If you need to load the AccuRoute buttons immediately, use the **Force Update Now** option.

To load the AccuRoute buttons using the Force Update Now option:

1 Go to the **OXPd:Workflow** page. See instructions in Modifying the OXPd Workflow (4-7) if you need any assistance.

2 Under the **Force Update** section, click **FORCE UPDATE NOW**.

The device connects to the Embedded AccuRoute for HP OXP, retrieves the configuration data. The OXPd .jar file processes the data and loads the AccuRoute buttons.

Modifying the Email Server setup

Set up the email server on the device to generate email notifications if there is a delivery failure.

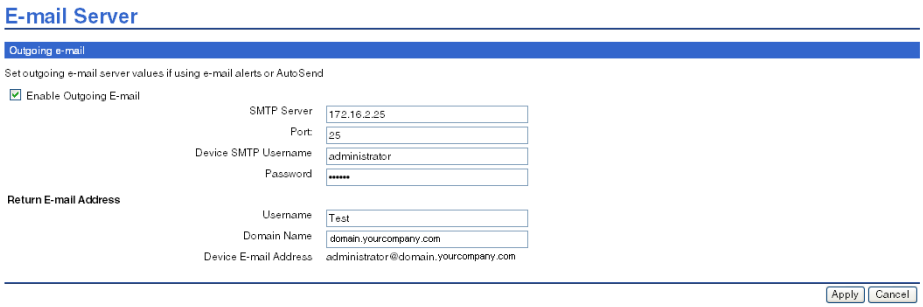
To modify the Email Server setup:

1 Open a web browser and enter the IP address of the device.

2 Click **LOG IN** and login to the device using the device administrator name and password.

3 Go to **Settings** > **EMAIL SERVER**.

4 Make appropriate modifications in the **Email Server** page.



a Select **Enable Outgoing E-mail**.

b In the **SMTP SERVER** text box, enter the IP address of the SMTP server.

c In the **DEVICE SMTP USERNAME** textbox, enter an appropriate user.

d In the **PASSWORD** textbox, enter the password for the device SMTP user.

e In the **Return E-mail Address section**, enter the **USERNAME**, and the **DOMAIN NAME**.

5 Click **APPLY**.

Configuring authentication

This section includes:

Choosing an authentication method

The Embedded AccuRoute for HP OXP 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 use either of the following methods:

- LDAP authentication
- User Pin authentication

Configuring LDAP Authentication

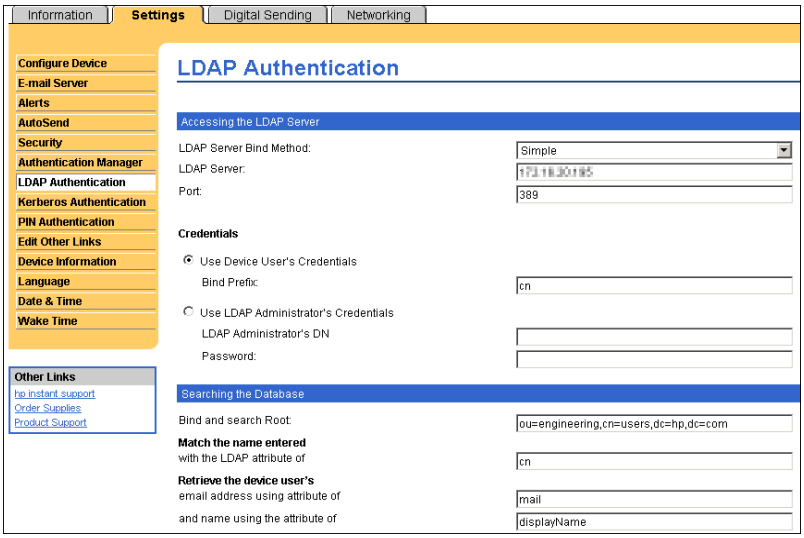
When you choose LDAP Authentication, the user is prompted to enter an e-mail username and password. The HP Authentication Manager uses the login credentials to initiate a lookup. The lookup validates the user and returns the user's e-mail address. Then the Embedded AccuRoute for HP OXP uses the e-mail 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

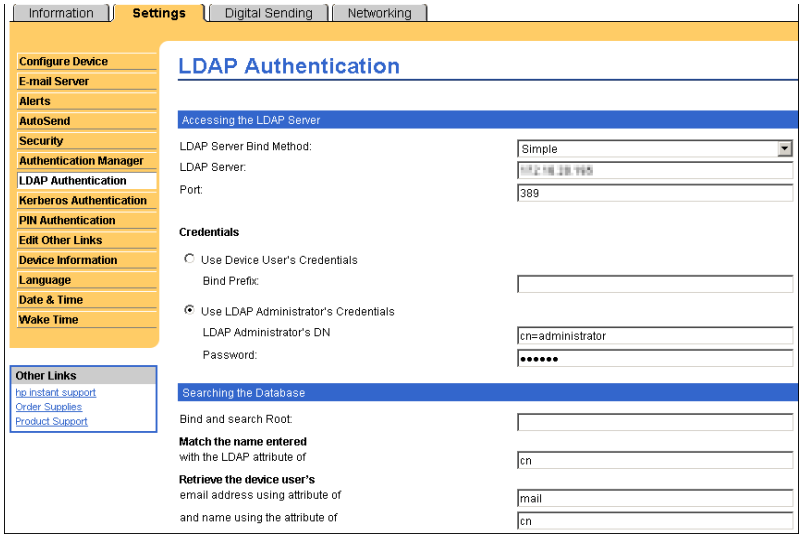
The following figures represent an example of an LDAP Authentication configuration for Active Directory (Go to Figure 4-A Example of an LDAP Authentication configuration for Active Directory on 4-11.) and the LDAP Authentication settings qualified with Lotus Notes (Go to Figure 4-B LDAP Authentication configuration qualified with Lotus Notes on 4-12.).

Figure 4-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 4-B **LDAP Authentication configuration qualified with Lotus Notes**



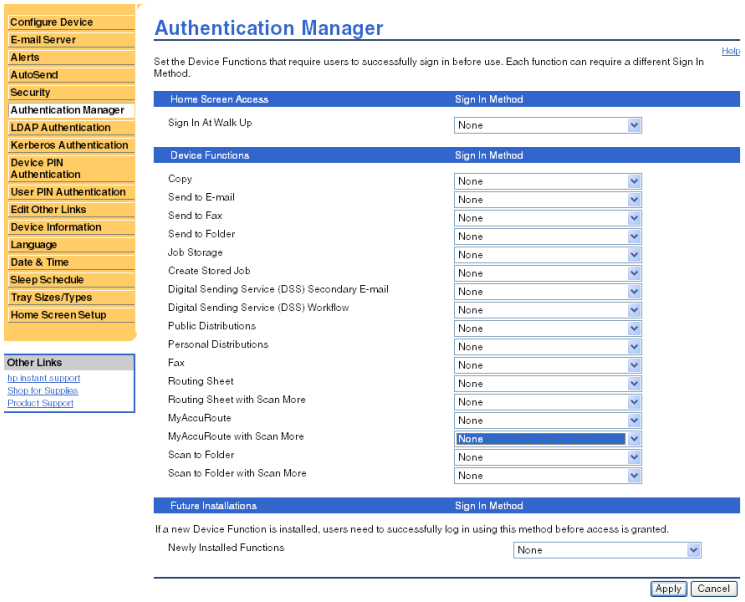
LDAP Authentication binds to the LDAP server with an administrator's common name (CN) and password. The search is conducted using the specified administrator's credentials. The return value is the user's e-mail address (mail) and name (CN).

Configuring authentication on the device

To configure authentication on the device:

1. Open a web browser and enter the IP address of the device.
2. Log in to the Embedded Web Server. All options become available.

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



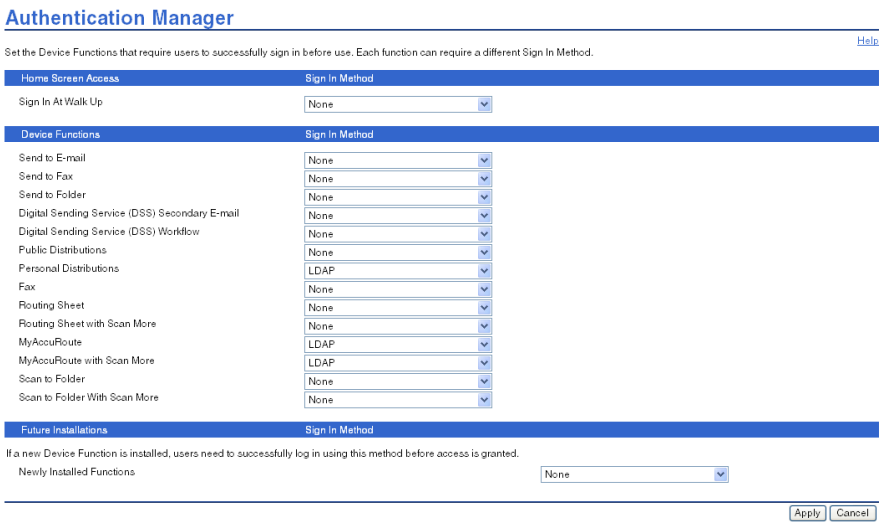
4 Locate the following AccuRoute functions:

- Personal Distributions
- MyAccuRoute
- MyAccuRoute with Scan More

The list shows the options that are installed with Embedded AccuRoute for HP OXP, 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 **LDAP** as the authentication method for each scanning feature that requires user login.



7 Click **APPLY**.

Configuring User PIN Authentication

The User PIN Authentication uses the **Omtool Authentication Agent** available with the Embedded Accuroute for HP Chai setup. This verifies the login credentials configured and stored in the LDAP server. **Omtool Authentication Agent** requires:

- a valid email address
- a specified field in the Active Directory where the PIN value can be configured

Note Omtool Authentication Agent is not supported for HTTPS connection.

Note Omtool Authentication Agent is not supported for Group 40 devices.

If you want to use **Omtool Authentication Agent**, contact Customer Service using any of the following methods:

- **Phone**: 888-303-8098 (toll-free in the US)
- **Fax**: 978-659-1301
- **E-mail**: customerservice@omtool.com or support@omtool.com

Using PIN authentication

After user PIN authentication is configured, device users can use their ID/PIN to access AccuRoute scanning capabilities from the HP device. The User ID/PIN replaces email as the login credential to be provided during authentication. It 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 organization. Authentication can be set up to identify the user by his PIN, in this case he does not need to provide any password to identify himself. In other cases, authentication can be set up where device user has to provide the password associated with his PIN.

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 OXP. Now you are ready to test the AccuRoute scanning features. Go to Section 6: Testing.

Creating a rule for Routing Sheet features

When a device user scans a document using the Routing Sheet features, the Embedded AccuRoute for HP OXP 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 **RoutingSheet** 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 the following outbound rule in the AccuRoute server.

To create a rule for scans using 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 `RoutingSheet`, 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 Embedded AccuRoute for HP OXP 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 the following outbound rule in the AccuRoute server.

To create a rule for scans using Public or Personal Distributions:

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 **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. 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 Embedded AccuRoute for HP OXP associates the destination e-mail address **myaccuroute** 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** 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 the following outbound rule in the AccuRoute server:

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

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 `myaccuroute` 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 **MYACCUROUTE**, 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. 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 Embedded AccuRoute for HP OXP 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.

Note The Scan to Folder and Scan to Folder with Scan More features require the Filescan connector. The Filescan connector must be added to the Omtool server before the rule can be created. For more information on the Filescan connector, consult the Administrator help. Go to Related documentation on 1-8.

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

Note The value FileScan is not case-sensitive.

   d. Click **NEXT**.
4. Create the action for this rule:
   a. Click **ADD**, select **ROUTE TO CONNECTOR**. 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. 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. Click **FINISH**.

The new outbound rule appears in the details pane.

Section 6: Testing

This section includes:

Testing the Routing Sheet feature

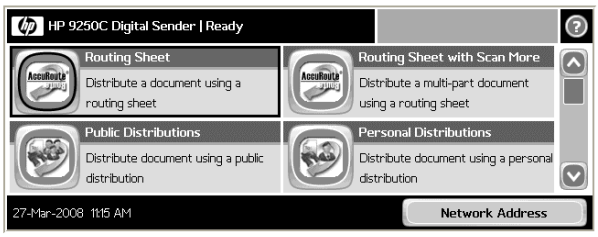
To test the Routing Sheet feature:

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

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

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

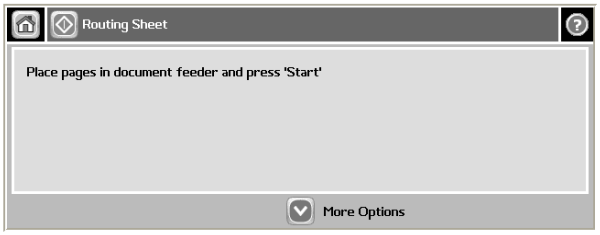
3 Assemble a test document. Add the Routing Sheet to the very front of the document or at the back and go to the device. The main screen looks like this:



4 Load the document into the document feeder or place it on the exposure glass. (Use the exposure glass for single page documents only.)

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

The device shows the **Ready to Scan** page.



You can do the following:

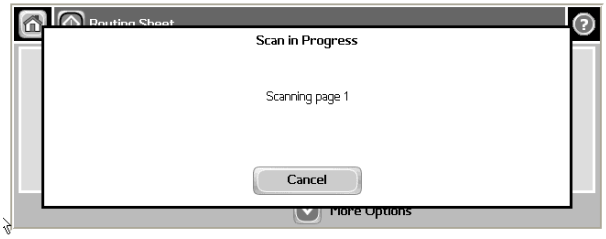
a To start the scan job, press or press **START** on the hard keypad.

b To change the scan attributes, click **MORE OPTIONS**.

6 Press or press **START** on the hard keypad.

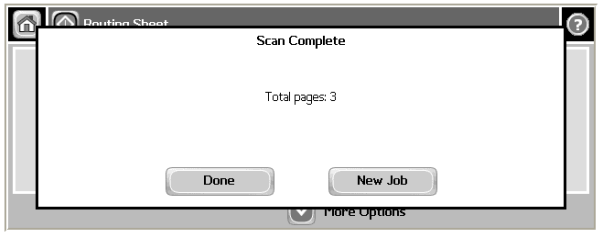
Note If you configure prompts, the **START** hard key pad is not active.

The scan job starts. A progress indicator shows the status of the scan job.



7 To stop the scan job, press **CANCEL**. Otherwise wait for the job to finish.

The device shows the **Scan Complete** page.



8 Click **DONE** to return to the main AccuRoute menu.

The document is transferred to the AccuRoute server via HTTP / HTTPs where it is processed and routed to the intended recipient. If the document does not arrive at the destination, troubleshoot the setup. Go to Section 7: Troubleshooting.

Important If you see that the AccuRoute server cannot decipher or interpret the Embedded Directive instructions in the Routing Sheet, you must change the device setting from **mixed** to **text**. For instructions, see Troubleshooting issues where the AccuRoute server cannot decipher the Embedded Directive instructions in a Routing Sheet (7-6)

Testing the Routing Sheet with Scan More feature

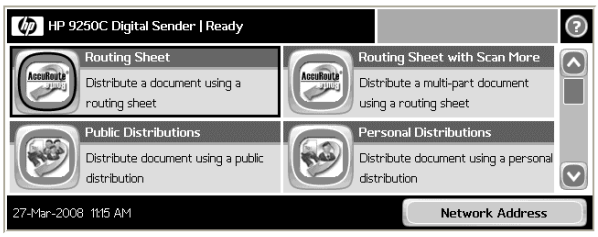
To test the Routing Sheet with Scan More feature:

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

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

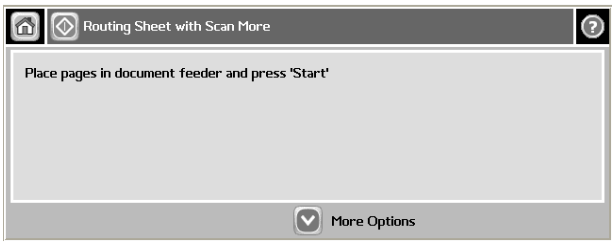
2 Generate and print a Routing Sheet using AccuRoute Desktop or the Omtool Web Client.

3 Assemble a test document. Add the Routing Sheet to the very front of the document or at the back and 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.) The device shows the **Ready to Scan** page.



You can do the following:

a To start the scan job, click press or press **START** on the hard keypad.

b To update the scan settings, click **MORE OPTIONS**.

5 Click press or press **START** on the hard keypad.

Note If you configure prompts, the **START** hard key pad is not active.

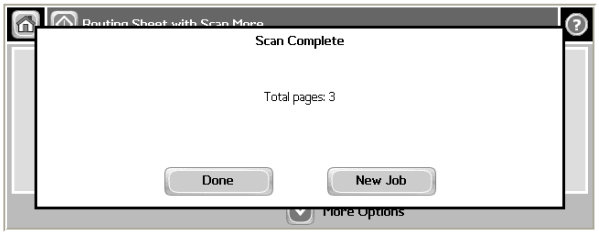
The scan job starts. A progress indicator shows the status of the scan job.

When scanning is complete, you are prompted to continue scanning or finish the scan job.

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 **RESUME**.

7 Repeat the process to scan additional pages. When you have finished scanning the document, press **FINISHED**.

The device shows the **Scan Complete** page.



8 Click **DONE** to return to the main AccuRoute menu.

The document is transferred to the AccuRoute server via HTTP / HTTPs where it is processed and routed to the intended recipient. If the document does not arrive at the destination, troubleshoot the setup. Go to Section 7: Troubleshooting.

Important If you see that the AccuRoute server cannot decipher or interpret the Embedded Directive instructions in the Routing Sheet, you must change the device setting from **mixed** to **text**. For instructions, see Troubleshooting issues where the AccuRoute server cannot decipher the Embedded Directive instructions in a Routing Sheet (7-6)

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 are AccuRoute Desktop and the Omtool Web Client.

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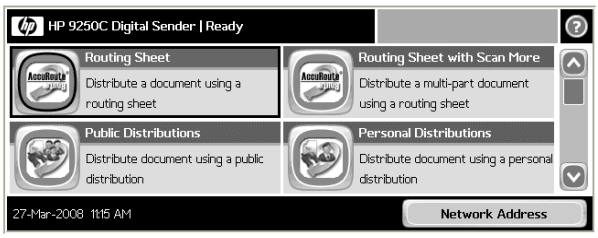
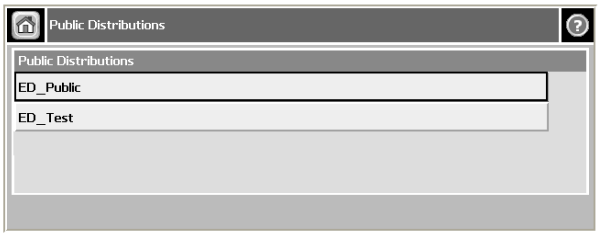
2 Assemble a test document and walk up to the device. The main screen looks like this:

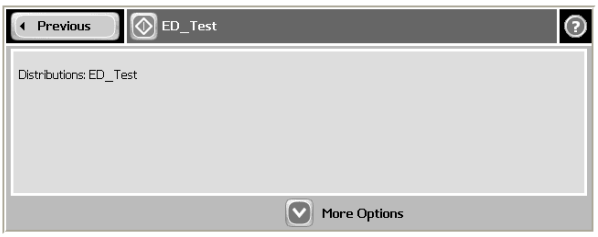


3 Load the document into the document feeder or place the document on the exposure glass. (Use the exposure glass for single page documents only.)

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



5 Press and select a distribution. The device shows the selected distribution.



You can do the following:

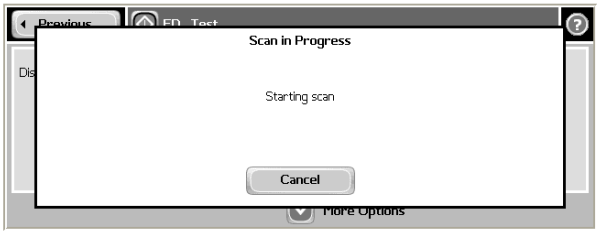
a To start the scan job, click press  or press **START** on the hard keypad.

b To update the scan settings, click **MORE OPTIONS**.

6 Click press  or press **START** on the hard keypad.

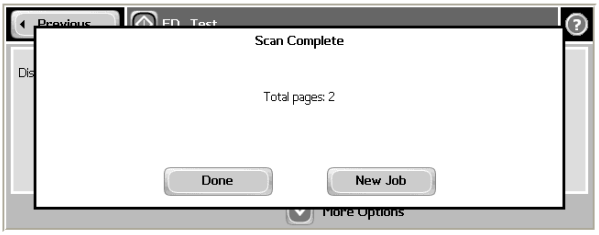
Note If you configure prompts, the **START** hard key pad is not active.

The scan job starts. A progress indicator shows the status of the scan job.



7 To stop the scan job, press **CANCEL**. Otherwise wait for the job to finish.

The device shows the **Scan Complete** page.



8 Click **DONE** to return to the main AccuRoute menu.

The document is transferred to the AccuRoute server via HTTP / HTTPs where it is processed and routed to the intended recipient. If the document does not arrive at the destination, troubleshoot the setup. Go to Section 7: Troubleshooting.

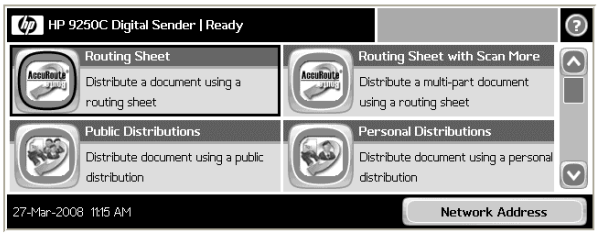
Testing the Personal Distribution feature

To test the Personal Distribution feature:

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

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

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



3 Load the document into the document feeder or place the document on the exposure glass. (Use the exposure glass for single page documents only.)

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

The device prompts you to log in.

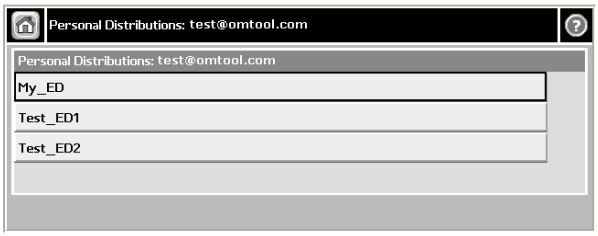
5 Login using your LDAP credentials.

a Press **USERNAME**. Enter your user name using the keypad that opens. Press **OK** to close the keypad.

b Press **PASSWORD**. Enter your password using the keypad that opens. Press **OK** to close the keypad.

c Press **OK** to login to the device.

The device shows your personal distribution options.



6 Press and select a distribution. The device shows the **Ready to Scan** page.

You can do the following:

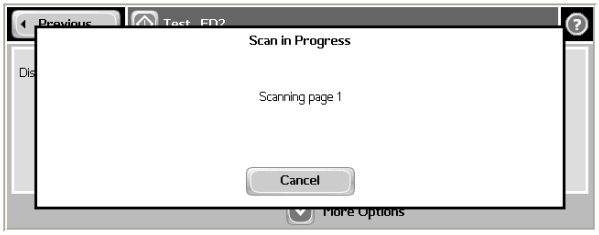
a To start the scan job, click press  or press **START** on the hard keypad.

b To update the scan settings, click **MORE OPTIONS**.

7 Click press  or press **START** on the hard keypad.

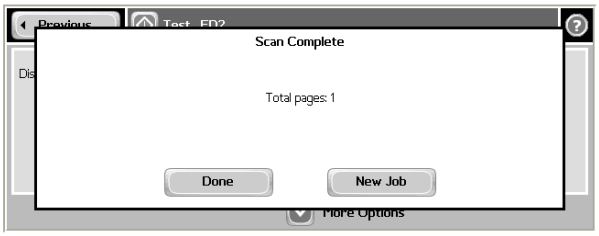
Note If you configure prompts, the **START** hard key pad is not active.

The scan job starts. A progress indicator shows the status of the scan job.



8 To stop the scan job, press **CANCEL**. Otherwise wait for the job to finish.

The device shows the **Scan Complete** page.



9 Click **DONE** to return to the main AccuRoute menu.

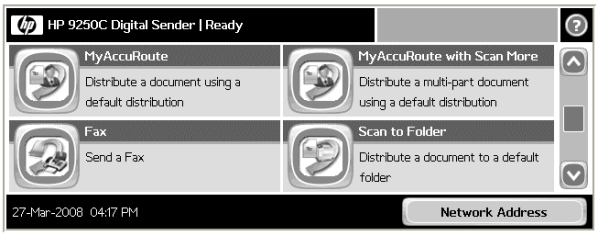
The document is transferred to the AccuRoute server via HTTP / HTTPs where it is processed and routed to the intended recipient. If the document does not arrive at the destination, troubleshoot the setup. Go to Section 7: Troubleshooting.

Testing the MyAccuRoute feature

To test the MyAccuRoute feature:

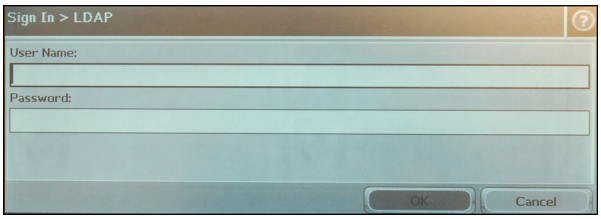
1 Verify that MyAccuRoute has been configured for your user account. For more information, consult the AccuRoute Desktop installation guide and AccuRoute Desktop user guide. Go to Related documentation on 1-8.

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. (Use the exposure glass for single page documents only.)

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



5 Login using your LDAP credentials.

a Press **USERNAME**. Enter your user name using the keypad that opens. Press **OK** to close the keypad.

b Press **PASSWORD**. Enter your password using the keypad that opens. Press **OK** to close the keypad.

c Press **OK** to login to the device. The device shows the **Ready to Scan** page.

You can do the following:

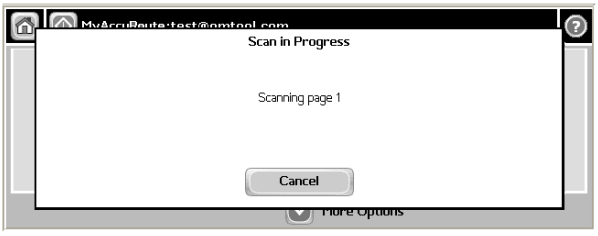
a To start the scan job, click press or press **START** on the hard keypad.

b To update the scan attributes, click **MORE OPTIONS**.

6 Click press or press **START** on the hard keypad.

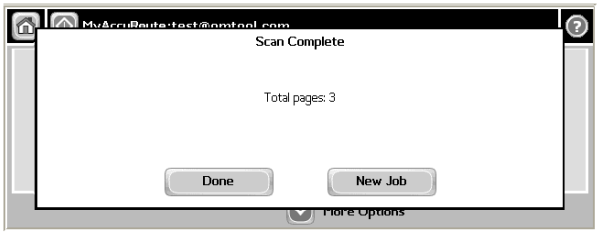
Note If you configure prompts, the **START** hard key pad is not active.

The scan job starts. A progress indicator shows the status of the scan job.



7 To stop the scan job, press **CANCEL**. Otherwise wait for the job to finish.

The device shows the **Scan Complete** page.



8 Click **DONE** to return to the main AccuRoute menu.

The document is transferred to the AccuRoute server via HTTP / HTTPs where it is processed and routed to the intended recipient. If the document does not arrive at the destination, troubleshoot the setup. Go to Section 7: Troubleshooting.

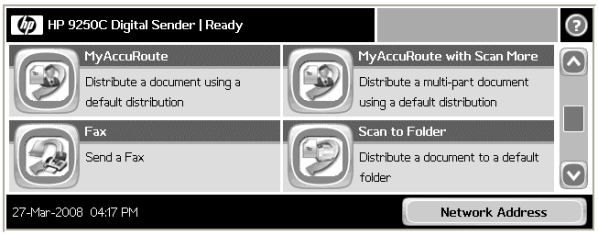
Testing the MyAccuRoute with Scan More feature

To test the MyAccuRoute with Scan More feature:

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

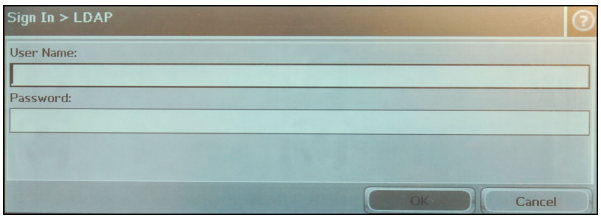
For more information, consult the AccuRoute Desktop installation guide and AccuRoute Desktop user guide. Go to Related documentation on 1-8.

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 it on the exposure glass. (Use the exposure glass for single page documents only.)

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



5 Login using your LDAP credentials.

a Press **USERNAME**. Enter your user name using the keypad that opens. Press **OK** to close the keypad.

b Press **PASSWORD**. Enter your password using the keypad that opens. Press **OK** to close the keypad.

c Press **OK** to login to the device. The device shows the **Ready to Scan** page.

You can do the following:

a To start the scan job, click press or press **START** on the hard keypad.

b To update the scan attributes, click **MORE OPTIONS**.

6 Click press or press **START** on the hard keypad.

Note If you configure prompts, the **START** hard key pad is not active.

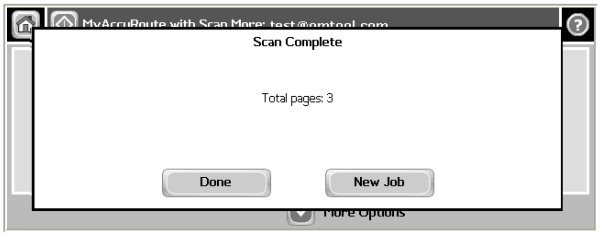
The scan job starts. A progress indicator shows the status of the scan job.

When scanning is complete, you are prompted to continue scanning or finish the scan job.

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 **RESUME**.

8 Repeat the process to scan additional pages. When you have finishes scanning all the pages, press **FINISHED**.

The device shows the **Scan Complete** page.



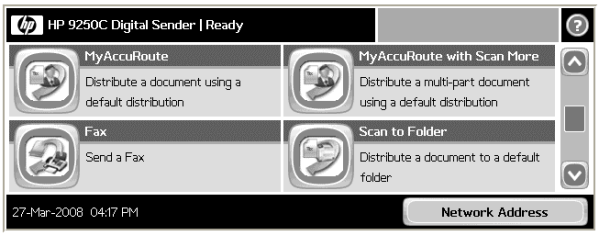
9 Click **DONE** to return to the main AccuRoute menu.

The document is transferred to the AccuRoute server via HTTP / HTTPs where it is processed and routed to the intended recipient. If the document does not arrive at the destination, troubleshoot the setup. Go to Section 7: Troubleshooting.

Testing the Fax feature

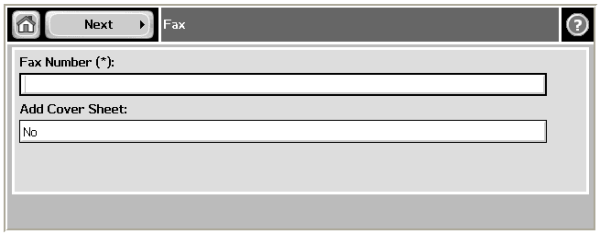
To test the Fax feature:

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



2 Load the document into the document feeder or place the document on the exposure glass. (Use the exposure glass for single page documents only.)

3 Press **FAX**. (If this feature is not visible, use the scroll bar to find it.) The device prompts you to enter the details about the fax.

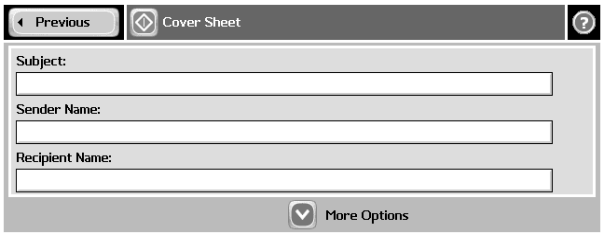


4 Press **FAX NUMBER** and enter the fax number from the keypad that opens.

5 If you do not want to add the cover page, click **NEXT**. The device shows the **Ready to Scan** message. Go to step 8

If you want to add a cover page press the text box below **ADD COVER SHEET**. The **Add Cover Sheet** page opens.

6 Press **YES** in the **Add Cover Sheet** page. Press **OK** to open the Cover Sheet page.



7 Enter the relevant information.

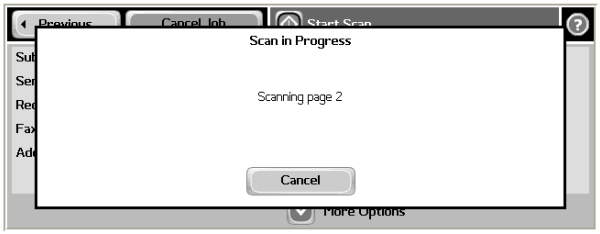
8 You can do the following:

a To start the scan job, click press or press **START** on the hard keypad.

b To update the scan attributes, click **MORE OPTIONS**.

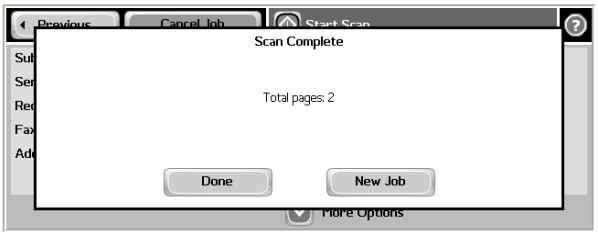
Note If you configure prompts, the **START** hard key pad is not active.

The scan job starts. A progress indicator shows the status of the scan job.



9 To stop the scan job, press **CANCEL**. Otherwise wait for the job to finish.

The device shows the **Scan Complete** page.



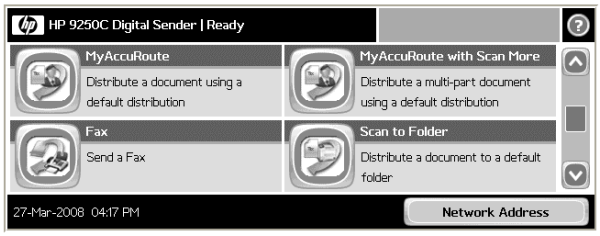
10 Click **DONE** to return to the main AccuRoute menu.

The document is transferred to the AccuRoute server via HTTP / HTTPs where it is processed and routed to the intended recipient. If the document does not arrive at the destination, troubleshoot the setup. Go to Section 7: 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. (Use the exposure glass for single page documents only.)

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

The device shows the **Ready to Scan** page.

You can do the following:

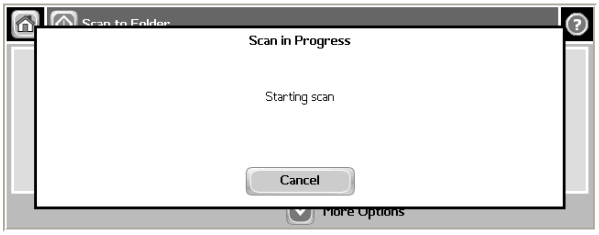
a To start the scan job, click press or press **START** on the hard keypad.

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

4 Click press  or press **START** on the hard keypad.

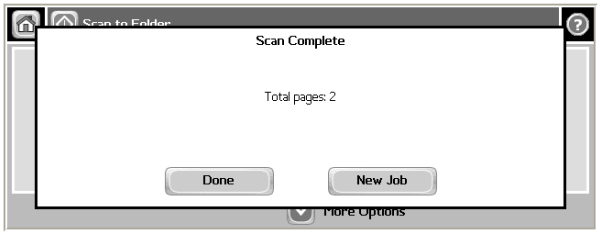
Note If you configure prompts, the **START** hard key pad is not active.

The scan job starts. A progress indicator shows the status of the scan job.



5 To stop the scan job, press **CANCEL**. Otherwise wait for the job to finish.

The device shows the **Scan Complete** page.



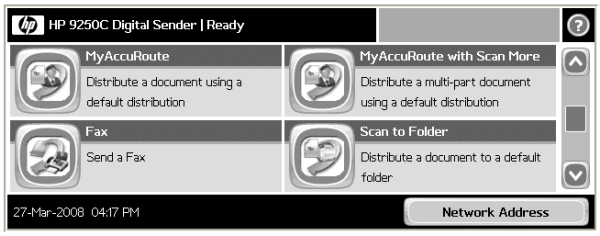
6 Click **DONE** to return to the main AccuRoute menu.

The document is transferred to the AccuRoute server via HTTP / HTTPs where it is processed and routed to the intended recipient. If the document does not arrive at the destination, troubleshoot the setup. Go to Section 7: Troubleshooting.

Testing the Scan to Folder with Scan More feature

To test the Scan to Folder with Scan More feature:

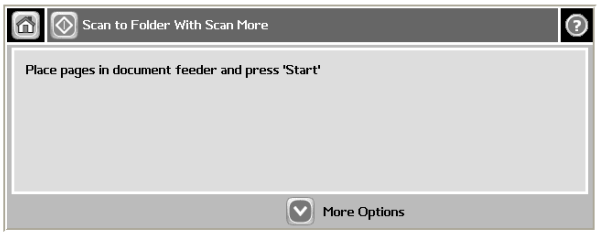
1 Assemble a test document and go to the device. The main screen looks like this:



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.)

The device shows the **Ready to Scan** page.



You can do the following:

a To start the scan job, click press or press **START** on the hard keypad.

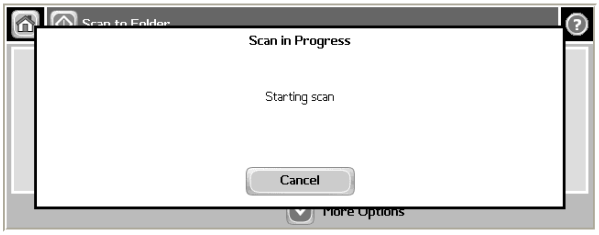
b To update the scan attributes, click **MORE OPTIONS**.

4 Click press or press **START** on the hard keypad.

Note If you configure prompts, the **START** hard key pad is not active.

The scan job starts. A progress indicator shows the status of the scan job.

When scanning is complete, you are prompted to continue scanning or finish the scan job.



5 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 **RESUME**.

6 Repeat the process to scan additional pages. When you have finishes scanning all the pages, press **FINISHED**.

The device shows the **Scan Complete** page.

7 Click **DONE** to return to the main AccuRoute menu.

The document is transferred to the AccuRoute server via HTTP / HTTPs where it is processed and routed to the intended recipient. If the document does not arrive at the destination, troubleshoot the setup. Go to Section 7: Troubleshooting.

Section 7: Troubleshooting

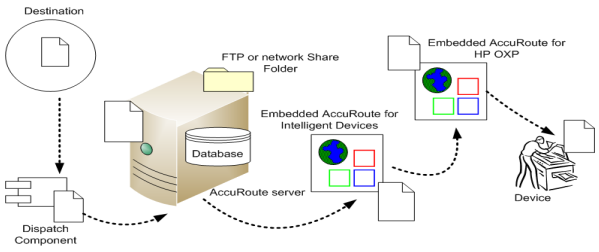
This section includes:

Complete these procedures in the order they appear. If you cannot resolve the issue, contact Omtool support.

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 7-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 AccuRoute server, the Embedded AccuRoute for HP OXP, the web server, and the device.

To begin troubleshooting, go to Troubleshooting the delivery mechanism (7-2).

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

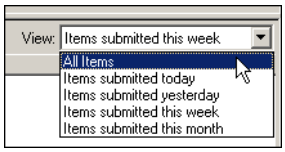
There are two important questions that can be resolved when troubleshooting a message on the Omtool server:

- 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:

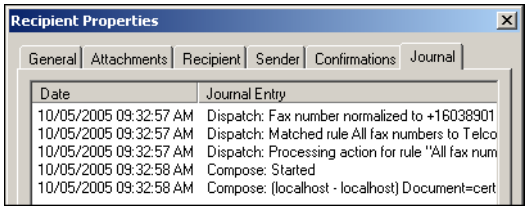
1. Start the Administrator.
2. Go to **OMTOOL SERVER ADMINISTRATOR > [SERVERNAME] > MESSAGES**.
3. Look for the message in the In Process queue:
   a. Click **IN PROCESS**.
   b. View **ALL ITEMS**.



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.

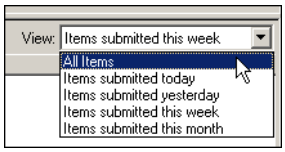


- **Message not found** - Go to step 4 and look for the message in the History queue.

4 Look for the message in the History queue:

a Click **HISTORY**.

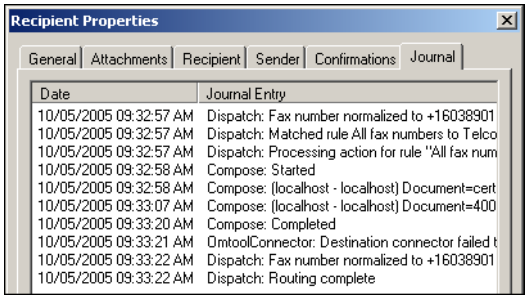
b View **ALL ITEMS**.



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.

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.

- **Message not found** - Continue to Troubleshooting the Embedded AccuRoute for HP OXP.

Troubleshooting the Embedded AccuRoute for HP OXP

To troubleshoot the Embedded AccuRoute for HP OXP, enable logging.

To enable logging:

1. Navigate to:

   C:\PROGRAM FILES\OMTOOL\HPOXP\CONFIGURATION

2. Open `configuration.xml` for editing.

3. Go to the <Diagnostics> node pertaining to the device group.

```
<Diagnostics>
        <!-- Defines whether logging is on or off (0 = off, non-zero = on) -->
         <prDebugLevel>0</prDebugLevel>
         <prFolderName></prFolderName>
</Diagnostics>
```

4. Change the value from `0` to `1`.

5. In the <prFolderName> node, enter the path to the debug folder followed by a "\". (For example, `C:\LogFolder\`)

6. Save your changes.

7. Restart the World Wide Web Publishing services.

8. Go to the embedded web server settings and load the AccuRoute buttons using the force update option. For instructions, see Loading the AccuRoute buttons using force update option (4-9).

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 changes to the configuration.xml file

Problem:

I made changes to the `configuration`.xml file. But I do not see my changes.

Solution:

When you make any changes to the xml file, you must always do the following so that the changes you make take effect.

- Open `configuration`.xml in a web browser (for example in Internet Explorer) to validate the xml format.
- Restart the World Wide Web Publishing service so that the changes you make take effect.
- Load the AccuRoute buttons on the device using the force update option. For instructions, see Loading the AccuRoute buttons using force update option (4-9)
- Enable authentication for the Personal, MyAccuRoute and MyAccuRoute with Scan More features.

Troubleshooting permission problems when setting up Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) in a cluster environment

Problem:

I am having permissions related issues when setting up Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) in a cluster environment.

Solution:

When setting up Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) in a cluster, you must configure permissions for the Anonymous user. For instructions, see Setting up Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) in a cluster

Troubleshooting issues where the AccuRoute server cannot decipher the Embedded Directive instructions in a Routing Sheet

Problem:

I am using an HP device to scan a document with a Routing Sheet. The AccuRoute server cannot decipher the instructions in the Routing Sheet and process the document.

Solution:

You must change the device setting from scanning a Mixed document to scanning a Text document.

To change the device settings in the Embedded Web Server

1. Open a web browser and enter the IP address of the device.
2. Click **LOG IN** and login to the device using the device administrator name and password.
3. Click **DIGITAL SENDING >PREFERENCES**.
4. For **DOCUMENT TYPE**, change the chosen option from **MIXED** to **TEXT**.

Appendix A: Optional configuration

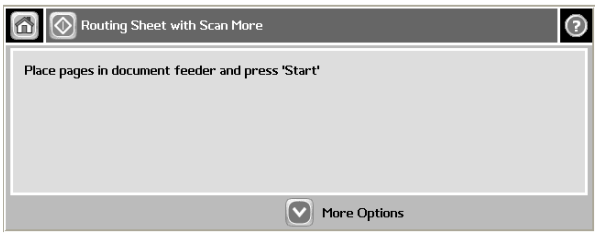
This section includes:

Enabling one touch scan capability

The one touch scan feature allows you to configure the Embedded AccuRoute for HP OXP in such a way that device users who use the Routing Sheet (with Scan More) and Scan to Folder (with Scan More) can start scanning their document as soon as they select the AccuRoute scanning feature.

Note If one touch scan is enabled, the device user is not prompted to start the scan job. This 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 configure certain scan attributes using **MORE OPTIONS**. Any changes made to a scan attribute are valid only for the current job.

The device user can make the following attribute changes:

- **Original Sides** - Allows device users to enable or disable duplex mode.
- **Resolution** - Allows setting the resolution of the output page.

- **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 Size** - Allows the device user to set the output page size.
- **Job Build** - Switch **ON/OFF** the job build mode. If job build mode is **ON**, it allows the user to append more documents.

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\HPOXP\CONFIGURATION
2. Open `configuration.xml` for editing.
3. Locate your device group. For example, if you have a Group 20 device, go to the `<Group20>` node.
4. Under the `<FeatureSpecific>` node for each feature you want to modify, go to the `<OneTouchEnabled>` node.
5. Change the value from `false` to `true`.
6. Save the file.
7. Restart the World Wide Web Publishing services.
8. Go to the embedded web server settings and load the AccuRoute buttons using the force update option. For instructions, see Loading the AccuRoute buttons using force update option (4-9).

Setting the priority order of the AccuRoute buttons

If your environment demands that you change the default order in which the AccuRoute buttons are listed on the device, you can change the priority order of the AccuRoute buttons relative to native HP buttons and other AccuRoute buttons.

To change the priority order:

1. Navigate to:

   C:\PROGRAM FILES\OMTOOL\HPOXP\CONFIGURATION
2. Open `configuration.xml` for editing.
3. Locate your device group. For example, if you have a Group 20 device, go to the `<Group20>` node.

4 Under the <FeatureSpecific> node for each feature you want to modify, go to the <priority> node.

5 Change the priority value. The value must be greater than or equal to zero. Use the information in the tables below to specify an appropriate value for the AccuRoute buttons.

Important An AccuRoute button with lower priority value relative to native HP buttons or other AccuRoute buttons is listed first followed by higher priority AccuRoute buttons.

Table 8-A Homescreen button priorities of HP OXP Group 20, 40 and 50 devices

Homescreen button	Priority value
Copy	10000
Fax	20000
E-mail	30000
Network Folder	50000
Job storage	60000
Supplies status	80000
Administration	90000

Table 8-B Homescreen button priorities of HP OXP Group 10 devices

Homescreen button	Priority value
Copy	10000
Fax	30000
E-mail	20000
Network Folder	50000
Job storage	60000
Supplies status	80000
Administration	90000

Table 8-C Homescreen button priorities of HP OXP Group 30 (Condor) devices

Homescreen button	Priority value
Copy	50
Fax	100

Table 8-C Homescreen button priorities of HP OXP Group 30 (Condor) devices

Homescreen button	Priority value
E-mail	150
Network Folder	200
default value	200
Job status	250
Job storage	300
Supplies status	400
Administration	500
Service	1000

6 Save the file.

7 Restart the World Wide Web Publishing services.

8 Go to the embedded web server settings and load the AccuRoute buttons using the force update option. For instructions, see Loading the AccuRoute buttons using force update option (4-9).

Installing patch 12154

Important Do not install this patch if you are using AccuRoute v2.3.

This is a requirement for prompts for systems using AccuRoute v2.2.

To install patch 12154:

1 Logon to the system running the AccuRoute server.

2 Copy over the patch to the system. Navigate to the folder with the patches.

3 Copy the files omfBarcodeU.dll and omWfcEmbDirectiveU.exe and paste them to:

\\PROGRAM FILES\OMTOOL\OMTOOL SERVER\BIN.

4 Copy all the other files to:

\\PROGRAM FILES\OMTOOL\OMTOOL SERVER\VENDORS\INLITERESEARCH.

5 Register the `ClearImage.dll` file.

Configuring the default scan properties

To configure the default scan properties:

1. Log on to the web server and go to

   C:\PROGRAM FILES\OMTOOL\HPOXP\CONFIGURATION
2. Open `configuration.xml` for editing.
3. Towards the end of the file, search for `<DeviceScanSettings>` and `</DeviceScanSettings>` node.
4. Edit the scan properties so they are appropriate for all or most device users. Use the guidelines in Guidelines on modifying the default scan properties (8-5)
5. Save your changes and close the file.
6. Restart the World Wide Web Publishing service.
7. Restart the HP device (that is switch it off and then on).T

Table 8-D Guidelines on modifying the default scan properties

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
ImageMode	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

Table 8-D Guidelines on modifying the default scan properties

Property	Impact	Syntax
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.

Setting prompts inside configuration.xml file

You can create prompts inside the configuration.xml file. They are completely configurable: they use a custom label, and the control can be either a list menu or a text field. List menus and text fields support default selections, and text fields also support minimum and maximum character lengths.

Embedded AccuRoute for HP OXP supports user-specified values for the following properties:

- file name
- file type

You can configure these properties to generate wizard pages. There are two steps to the process:

- Defining prompts (see Defining a prompt (8-8))
- Enable the prompts (see Enabling the prompt (8-10))

Here is an example of how to create and enable a prompt for better understanding:

1 Define the prompts. This is a global setting that allows for any feature or any group to either call or not call the specific prompt. This setting is towards the end of the `configuration.xml` file and belongs after the node `<DeviceScanSettings>` and before the node `<DeviceSpecificSettings>`.

   Here is an example of a file name wizard that prompts the device user to enter the name of the output file for delivery to the specified destination. The name of the prompt that is being defined is Filename.

```
</DeviceScanSettings>
<Prompts>
<Filename>
  <Display>Wizard</Display>
  <Label>Filename:</Label>
  <Instructions>Enter Filename</Instructions>
  <Type MinLength="3" MaxLength="10">Text</Type>
<Values>
  <Value internal="" default="true">Document</Value>
  </Values>
<Properties>
  <Property override="true" templatetag="false"
mapTypeDMS="false">prDeliveredDocumentName</Property>
  </Properties>
  </Filename>
</Prompts>
<DeviceSpecificSettings>
```

2 Now that the prompt is defined, you must call it from specific AccuRoute features. To do this, find the group for your device and find the feature in question, for example on a Group 10 device you want to set up the Public Distributions feature to prompt for a filename. You would need to find the `<FeatureSets>` node in the configuration.xml file, then find the node for Group 10. In group 10 you will see a `<GroupEd>` node that begins with this:

```
<Feature id="Group" type="GroupED" enabled="true">
```

In that node find the commented section for prompts

```
<!-- Prompts
                                                Allows customized UI
to be displayed for this feature to collect additional information
from the user to submit to the AccuRoute server. (See prompts
specification for details on node contents)
---->
```

3 After the commented section but before `</Feature>`, enter the following code:

```
<Prompts>
  <<Prompt>Filename</Prompt>
</Prompts>
```

The configurations above will produce a text field with the label “Filename:” and a default value “Document”. The property “prDeliveredDocumentName” is the column in the Omtool server message database where the filename of the delivered document is stored.

Note A DMS requires a different templatetag than a non DMS output.

Defining a prompt

To define a prompt:

1. Navigate to:

   C:\PROGRAM FILES\OMTOOL\HPOXP\CONFIGURATION

2. Open `configuration.xml` for editing.

3. Search for `</DeviceScanSettings>` and right after that manually add the following code using the guidelines in the table below.

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

```
</Prompts>
```

Table 8-A Guidelines on creating prompts

Property	Impact	Syntax
Prompt Name	Determines the value of the prompt	string
Display	Determines whether the overriding property would be displayed in a separate Wizard page.	Use the following value: Wizard
Label	Determines the title to be displayed for Wizard screen.	[Name of the label]
Instructions	Determines the instructions that is displayed in the wizard screen.	[description]
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 GenericList data type.**	Use one of the following values: • Text • GenericList
Value	Determines the value to be displayed or selected on the Wizard screen based on the data type. The attribute **internal** stores the corresponding internal code used within the Accuroute server. The attribute **default** denotes that the corresponding value is the default. For GenericList data type, the value is selected by default on the screen. For Text data type, the corresponding value is displayed in the text box.	[Value] [code value] Use one of the following values: • true • false
Property	Determines the property name that is used within the Accuroute server. The **override** attribute denotes that this is an overriding property. The **templatetag** attribute denotes that this is a template tag. The **mapTypeDMS** attribute denotes that this is an overriding property of the DMS type.	[Property name] Use one of the following values • true • false Use one of the following values • true • false Use one of the following values • true • false

Note A DMS requires a different templatetag than a non DMS output.

4 Save your changes.

Enabling the prompt

To enable the prompt:

1. In the `configuration.xml`, find the `<FeatureSets>` node and then find the node for your device group. For example, if you have a Group 20 device, go to the <Group20> node.
2. In that group, find the line that begins with `<Feature id ...>`

   ```
   <Feature id="Group" type="" enabled="true|false">
   ```
3. Use the following list to find the AccuRoute feature for which you want to enable prompts:
   - **GroupED** - Defines a Public Distributions feature
   - **PersonalED** - Defines a Personal Distributions feature
   - **Fax** - Defines a Fax feature
   - **Routing Sheet** - Defines Routing Sheet and Routing Sheet with Scan More features
   - **MyAccuroute** - Defines MyAccuRoute and MyAccuRoute with Scan More features

   For example, if you want to enable prompts for Public Distribution feature, modify as shown below:

   ```
   <Feature id="Group" type="Group ED" enabled="true">
   ```
4. Find the commented section for prompts

   ```
   <!-- Prompts
                                                  Allows customized UI
   to be displayed for this feature to collect additional information
   from the user to submit to the AccuRoute server. (See prompts
   specification for details on node contents)
   ---->
   ```
5. Go to the end of the commented section. Before `</Feature>` enter the following code:

   ```
   <Prompts>
     <<Prompt>Prompt name</Prompt>
   </Prompts>
   ```

   where Prompt Name is the value you entered for the <Prompt> node in Defining a prompt (8-8).

   Save your changes.
6. Restart the World Wide Web Publishing services.
7. Go to the embedded web server settings and load the AccuRoute buttons using the force update option. For instructions, see Loading the AccuRoute buttons using force update option (4-9).

You can add Filename and Filetype prompts for any or all the AccuRoute scanning features depending upon the requirements of your environment.

Here is another example of how you can define the prompt data.

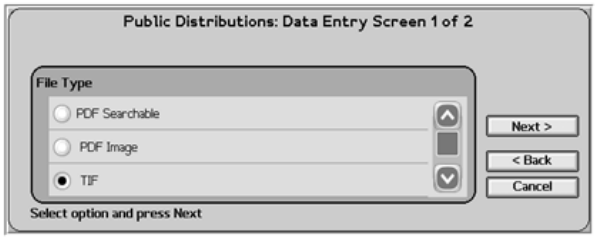
Example 1

```
<Prompts>
 <Filetype>
     <Display>Wizard</Display>
```

```
  <Label>File Type</Label>
  <Type>GenericList</Type>
 <Values>
  <Value internal="OCR.PDF" default="true">PDF Searchable</Value>
  <Value internal="PDF">PDF Image</Value>
  <Value internal="G4.TIF">TIF</Value>
  <Value internal="OCR.DOC">MS Word</Value>
  </Values>
 <Properties>
 <Property override="true" templatetag="false">prFinalFormCode</Property>
 </Properties>
</Filetype>
</Prompts>
```

Wizard display type

The <Prompt> data you define is a "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 or after the Cover Page if selected and only if there is no error.
- If one touch is enabled and the device user selects Routing Sheet (with Scan More) or MyAccuroute (with Scan More) or Scan to Folder (with Scan More), the wizard pages open as the first page immediately after the user selects the scan job option on the main AccuRoute menu.

Overriding recipient properties using wizard pages

The override recipient property feature allows the device administrator to configure properties 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 the Omtool server administrator.

Override delivery format in the AccuRoute server

To enable the sender to override the delivery format

1. Go to the Omtool server and navigate to outbound rules.
2. Find all rules 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 up Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) in a cluster

To set up Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) in a cluster

1. Click **START > RUN**.
2. Enter `dcomcnfg`. Press **OK**.

   The **Component Services** console opens.
3. Expand **COMPONENT SERVICES > COMPUTERS > MYCOMPUTER > DCOM CONFIG**.
4. Browse down to find the application **OmGFAPIServer**.
5. Right click the application and select **PROPERTIES** from the drop down menu.

   The **Properties** page opens.
6. Click **SECURITY** to open the **Security** page.
7. For all three levels **Launch and activation permissions**, **Access Permissions** and **Configuration Permissions**, click **EDIT**.
8. Add **Anonymous** to the list of users and give him full permissions.

Enabling Batch Scanning

To enable batch scanning:

1. Navigate to:

   C:\PROGRAM FILES\OMTOOL\HPOXP\CONFIGURATION
2. Open `configuration.xml` for editing.
3. Locate your device group. For example, if you have a Group 20 device, go to the `<Group20>` node.

4 In that group, find the line that begins with `<Feature id="RoutingSheet"...>`

```
<Feature id="RoutingSheet" type="RoutingSheet" enabled="true"
toplevel="true">
                .....
                      <Recipient>
                            <prRecipientType>0</prRecipientType>
                           <prDestination>RoutingSheet</prDestination>
</Recipient>
```

5 Add the property `<prAccuRouteBatchScan>` after the property `<prDestination>` and set it to true:

```
<Feature id="RoutingSheet" type="RoutingSheet" enabled="true"
toplevel="true">
                .....
                      <Recipient>
                            <prRecipientType>0</prRecipientType>
                           <prDestination>RoutingSheet</prDestination>
                      <prAccuRouteBatchScan>true</prAccuRouteBatchScan>
</Recipient>
```

6 Save your changes and close the file.

Appendix B: Setting up a CA Certificate using Microsoft Certificate Services and enable SSL

If you selected HTTPs support, you must follow the instructions in this section and set up a CA Certificate and enable SSL. The certificate must be created and installed in the IIS.

This section includes:

Requirements for setting up a CA certificate

The following requirements must be met when a CA certificate is being set up:

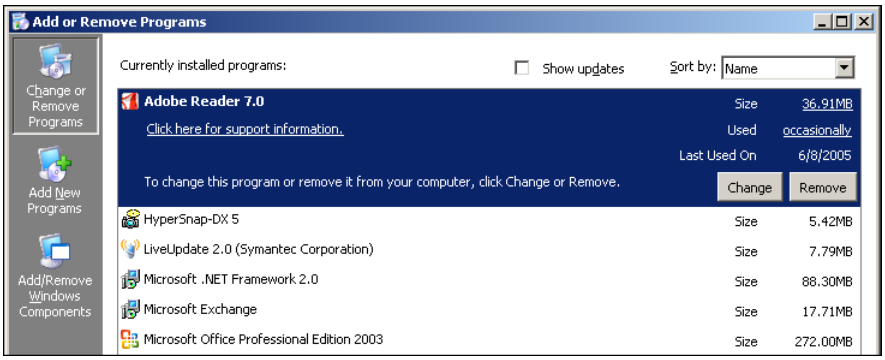
- ❒ web server that meets the requirements for AccuRoute Intelligent Device Client. Go to Installing Embedded AccuRoute for HP OXP on a remote system (3-5)
- ❒ Windows user account that belongs to the local Administrators group
- ❒ Windows installation CD

Installing the Certificate Services component

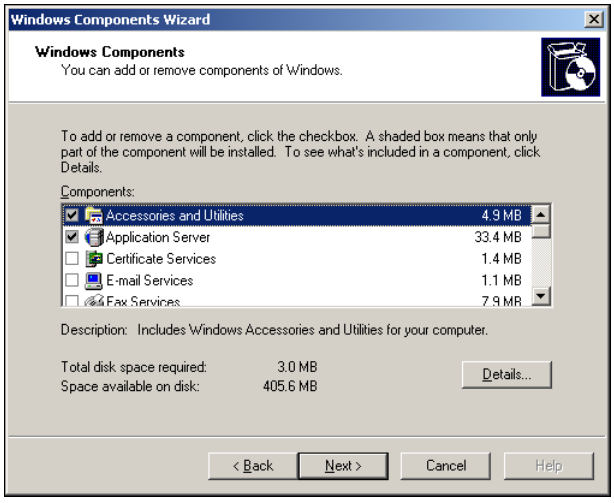
This Windows Components Wizard temporarily stops IIS. Plan the installation accordingly.

To install the Certificate Services component:

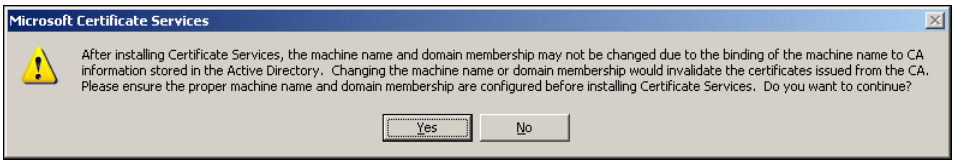
1 Go to Control Panel and start **ADD OR REMOVE PROGRAMS**.



2 Click **ADD/REMOVE WINDOWS COMPONENTS**. The Windows Components Wizards starts.

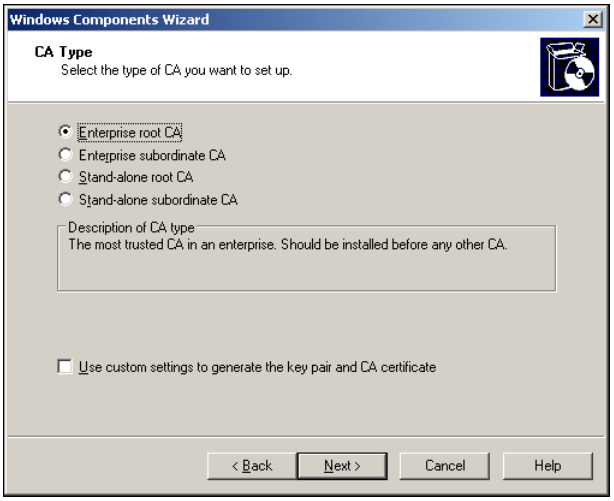


3 Select **CERTIFICATE SERVICES**. A message box opens.

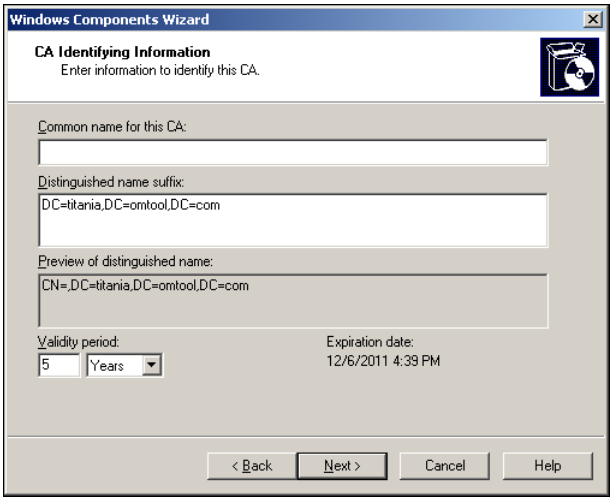


4 Read the message and click **YES**.

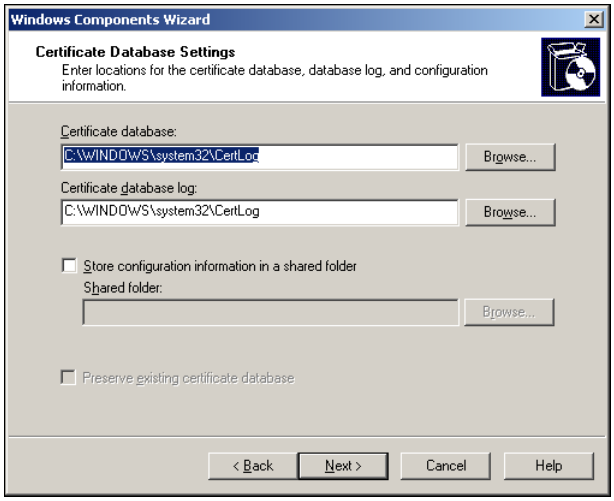
5 Click **NEXT**. The **CA Type** page shows the CA options.



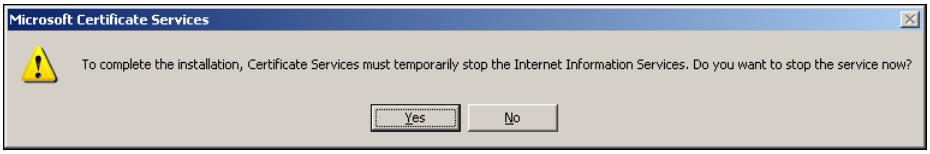
6 Verify **ENTERPRISE ROOT CA** is selected and click **NEXT**. The **CA Identifying Information** page shows details about the CA.



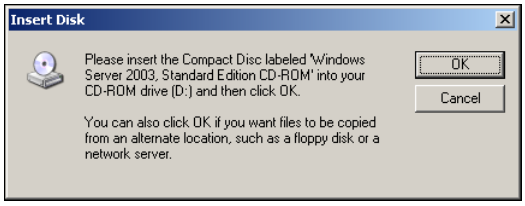
7 Enter the Common Name for the CA and click **NEXT**. The **Certificate Database Settings** page shows default locations for the certificate database and certificate database log.



8 Click **NEXT**. A message indicating that the installation stops IIS temporarily opens.

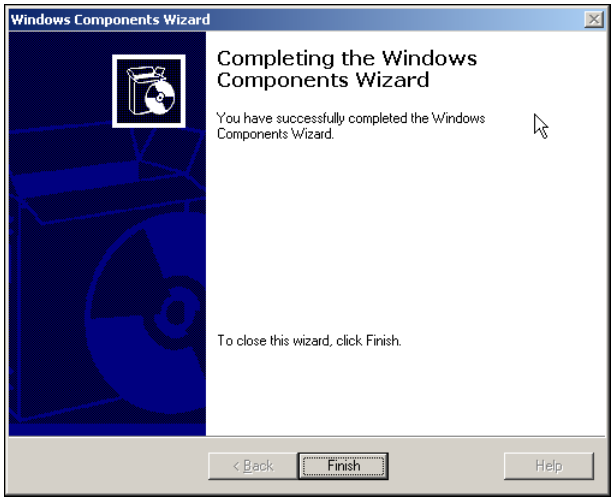


9 Click **YES**. A message indicating that the Windows CD or network access to the setup files is required opens.



10 Click **OK** and locate the files that are required to complete the installation.

The Windows Components Wizard shows a message indicating that the component is installed successfully.



11 Click **FINISH**.

Creating a CA certificate request

To request a CA certificate:

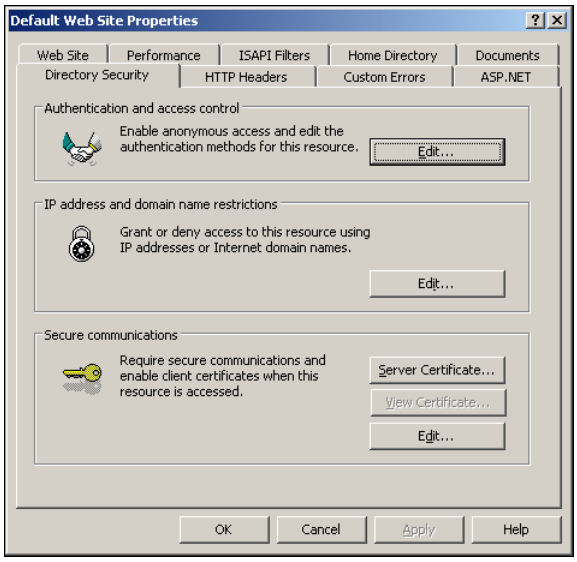
1 Start IIS. Locate and expand **DEFAULT WEB SITE** in the console tree

2 Configure **Default Web Site** using the instructions below:

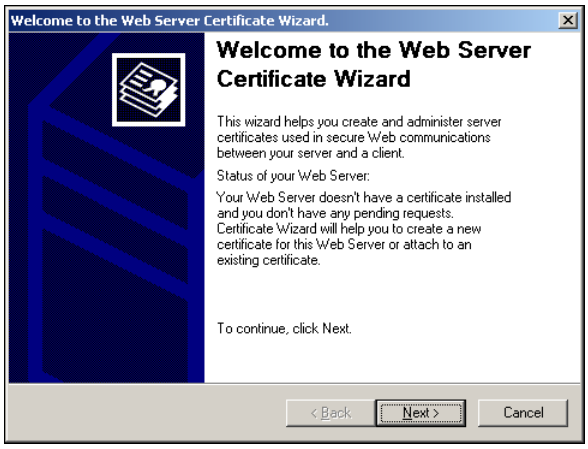
a Right click **DEFAULT WEB SITE** and select **PROPERTIES** from the drop down menu.

The **Properties** page opens.

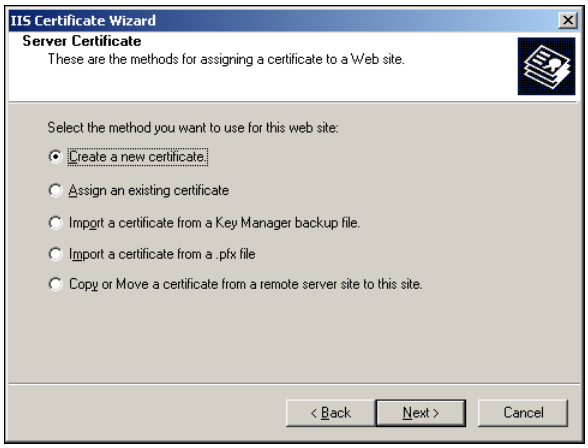
b Click the **DIRECTORY SECURITY** option.



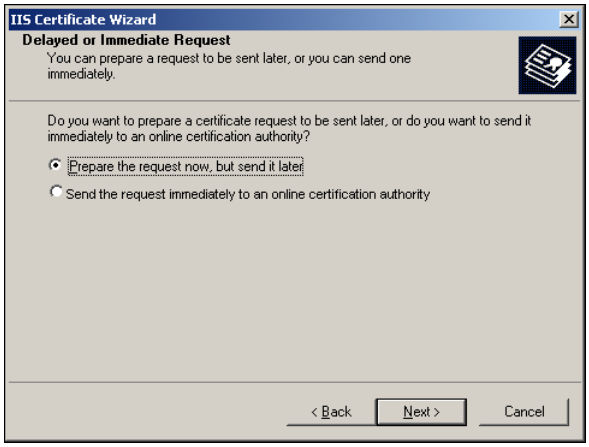
c In the **Secure communications** section, click **SERVER CERTIFICATE**. The certificate wizard shows a welcome message.



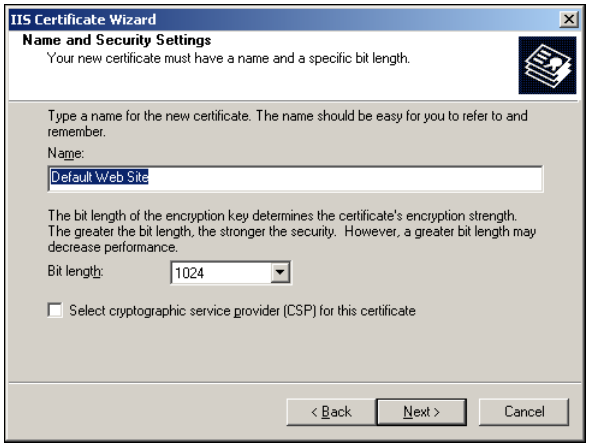
3 Click **NEXT**. The **Server Certificate** page opens.



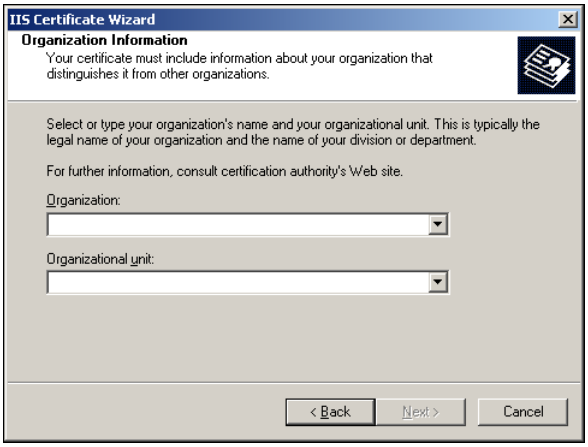
4 Verify that **CREATE A NEW CERTIFICATE** is selected and click **NEXT**. The **Delayed or Immediate Request** page opens.



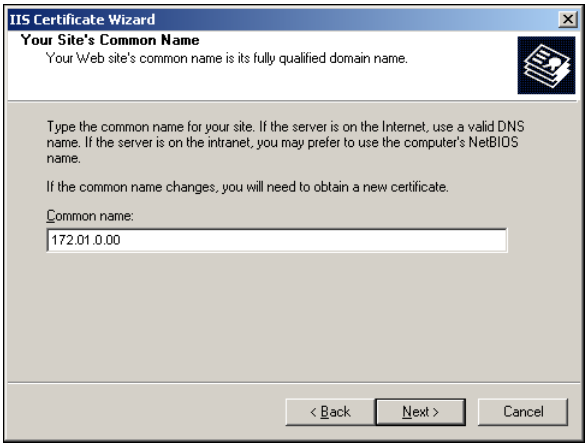
5 Click **NEXT**. The **Name and Security Settings** page opens.



6 Enter a friendly name for the certificate and click **NEXT**. The **Organization Information** page opens.

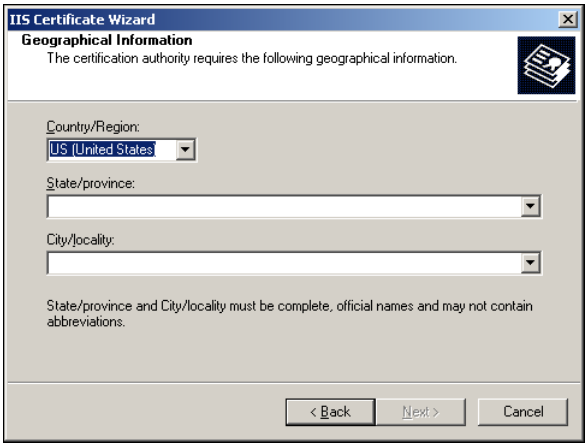


7 Enter the organization name and organizational unit name and click **NEXT**. The Your Site's Common Name page opens.

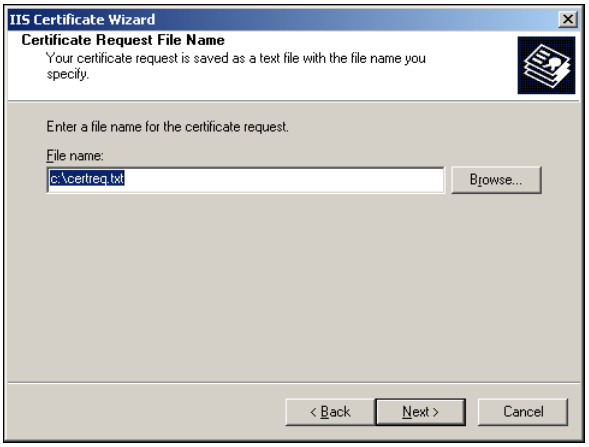


Note In the **Common Name** text box, you must enter the IP address of the system and not the name of the host.

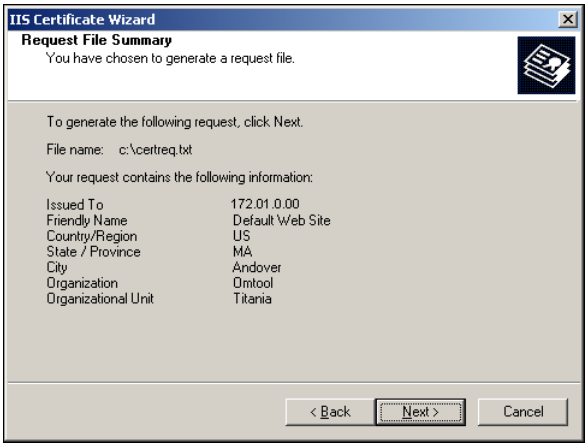
8 Enter the IP address CA server and click **NEXT**. The **Geographical Information** page opens.



9 Select the country/region, state/province, and city/locality, and click **NEXT**. The **Certificate Request File Name** page opens.

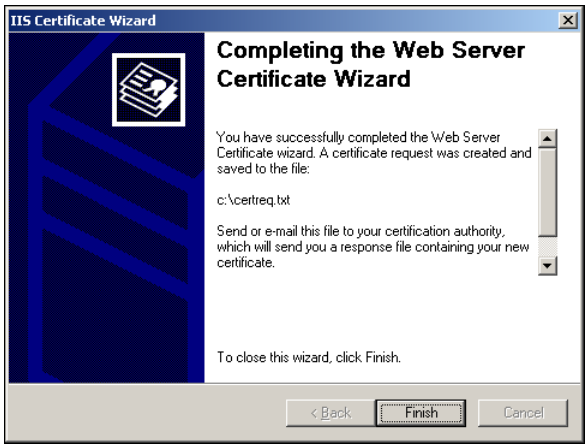


10 Change the location and file name for the certificate request if necessary, and then click **NEXT**. The **Request Summary** page opens.



11 Review the request details and click **NEXT**.

When the certificate request is created, you see the following message:



12 Click **FINISH** and then click **OK** to close the **Default Web Site Properties** page.

The certificate request is saved to a file.

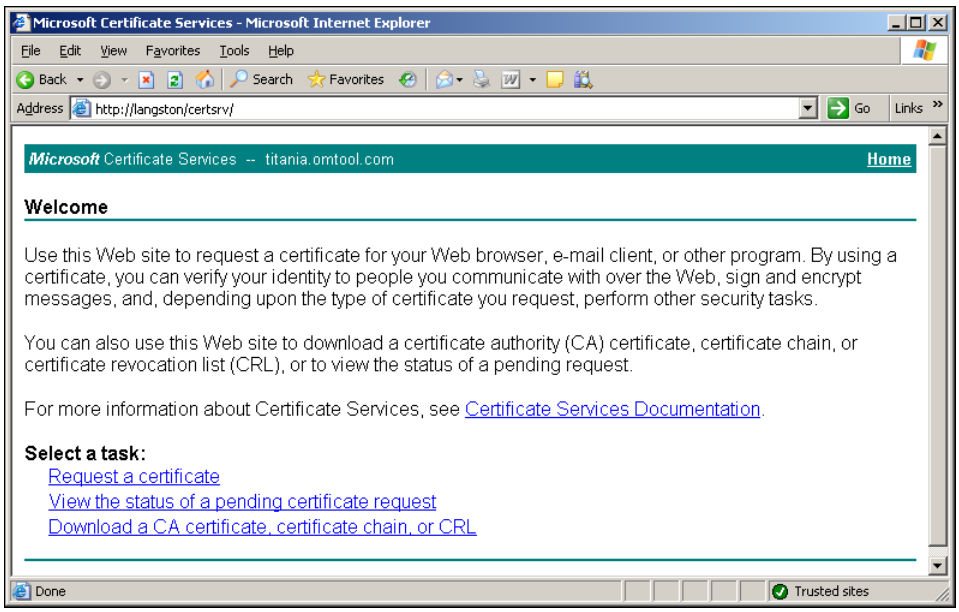
Requesting the CA certificate

To request the CA certificate:

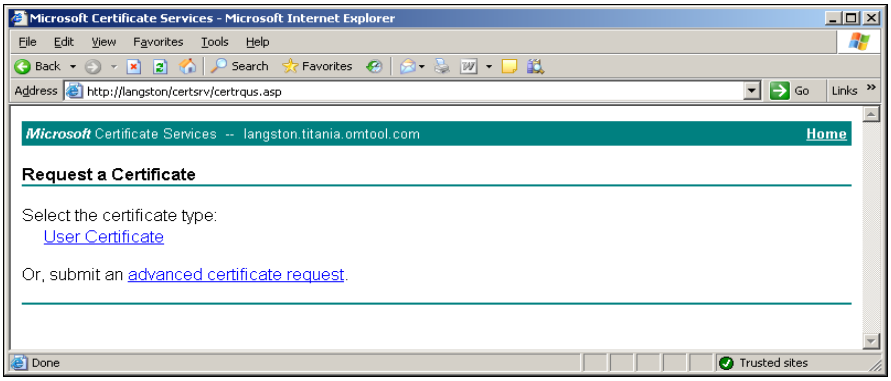
1 Start the browser and go to `http://[web server]/certsrv`

If prompted for login credentials, enter the username and password of an account that belongs to the local Administrators group on the web server.

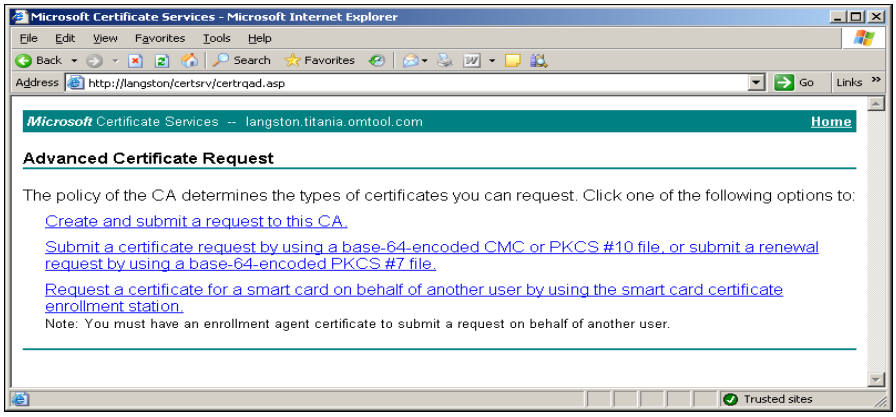
If Internet Explorer displays a message indicating that this site is not trusted, add the site to the list of trusted sites and continue.



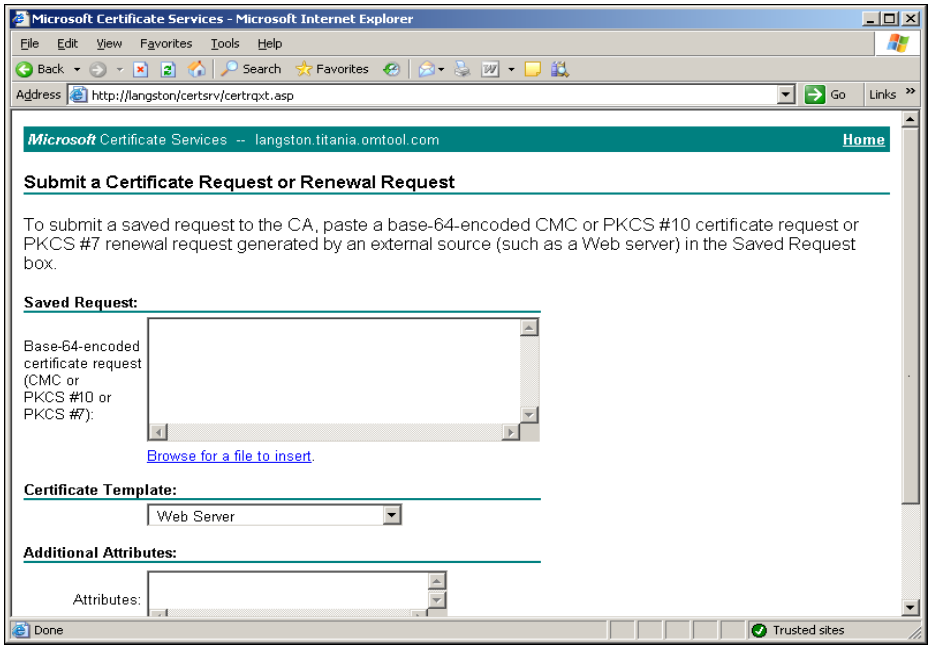
2 Click **REQUEST A CERTIFICATE**.



3 Click **ADVANCED CERTIFICATE REQUEST**.



4 Click **SUBMIT A CERTIFICATE REQUEST BY USING A BASE 64-ENCODED CMC OR PKCS #10 FILE, OR SUBMIT A RENEWAL REQUEST BY USING A BASE 64-ENCODED PKCS #7 FILE**.



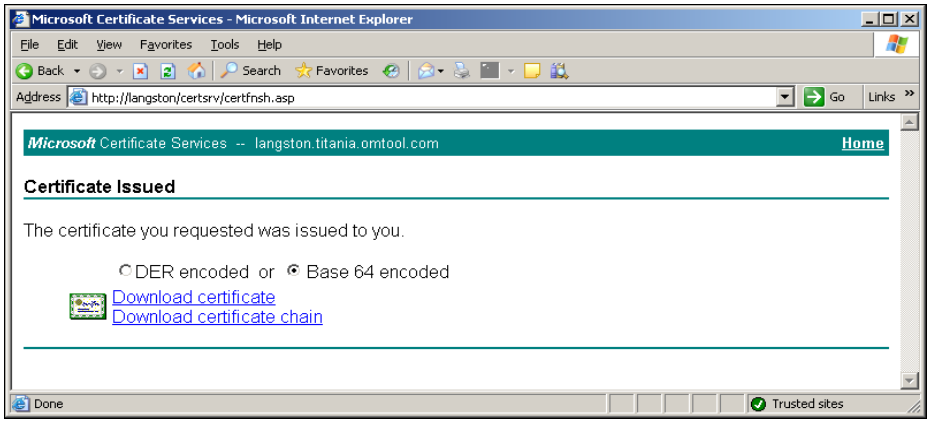
5 Complete the form:

a Click **BROWSE FOR A FILE TO INSERT** and select the file containing the certificate request.

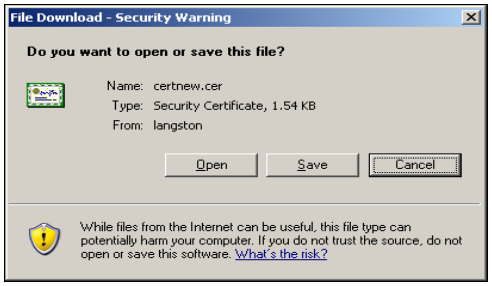
If Internet Explorer displays a warning that the security settings prevent the page from accessing the request file, go to the file, select and copy the content, and paste it into the Saved Request field.

b Go to the **Certificate Template** menu and select **WEB SERVER**.

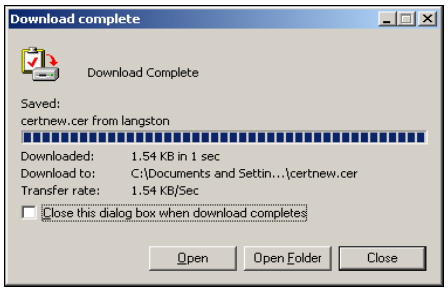
c Click **SUBMIT**.



6 Select **BASE 64 ENCODED** and click **DOWNLOAD CERTIFICATE**. A message prompts you to open or save the file.



7 Click **SAVE**, and save the file to your computer.



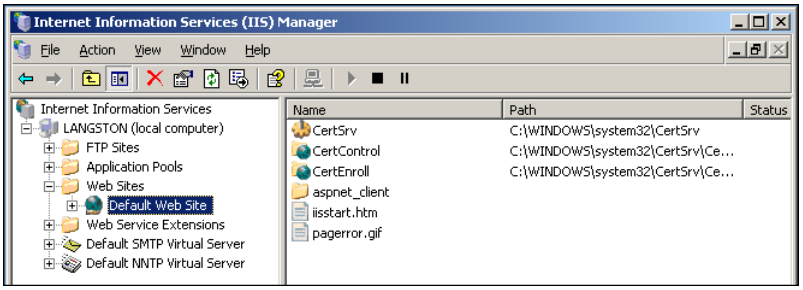
8 Click **CLOSE**.

9 Close the browser.

Installing the CA certificate on the Default Web Site

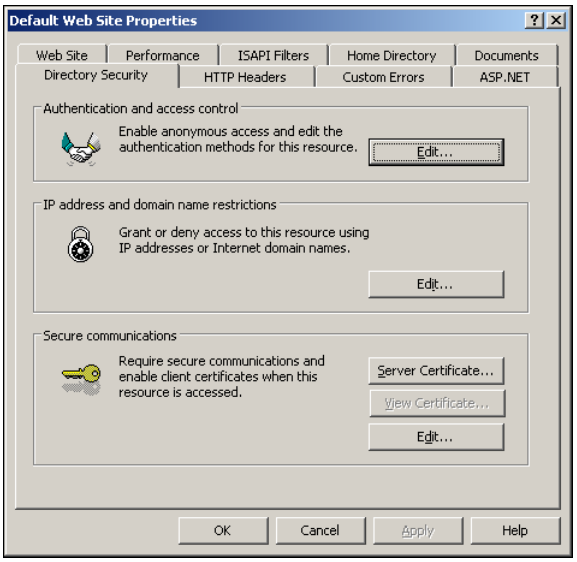
To install the CA certificate on the Default Web Site:

1 Start IIS and go to the Default Web Site in the console tree.



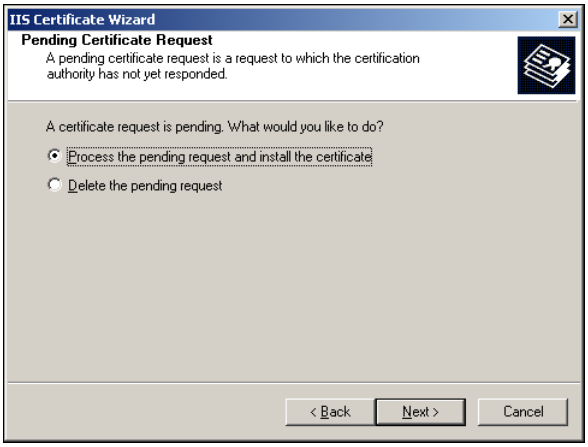
2 Right-click **DEFAULT WEB SITE** and select **PROPERTIES**.

3 Go to the **DIRECTORY SECURITY** tab.

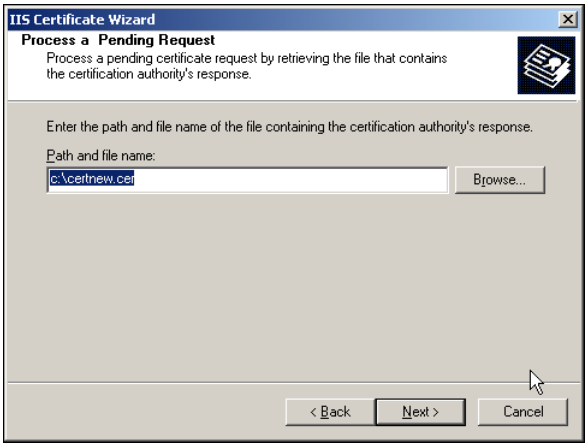


4 In the **Secure communications** section, click **SERVER CERTIFICATE**. The certificate wizard shows a welcome message.

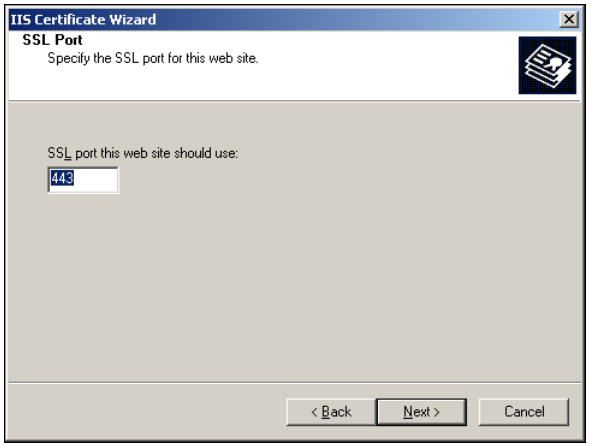
5 Click **NEXT**.



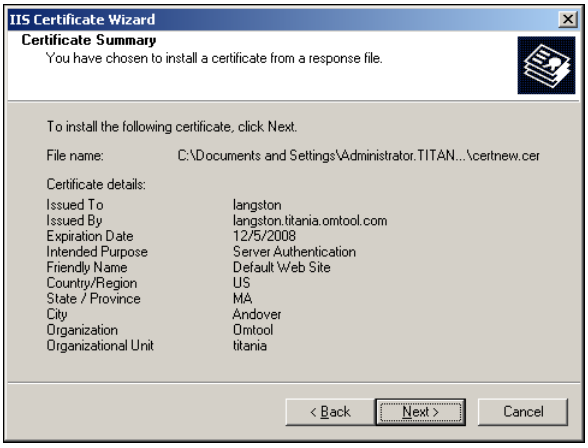
6 Verify that **PROCESS THE PENDING REQUEST AND INSTALL THE CERTIFICATE** is selected and click **NEXT**.



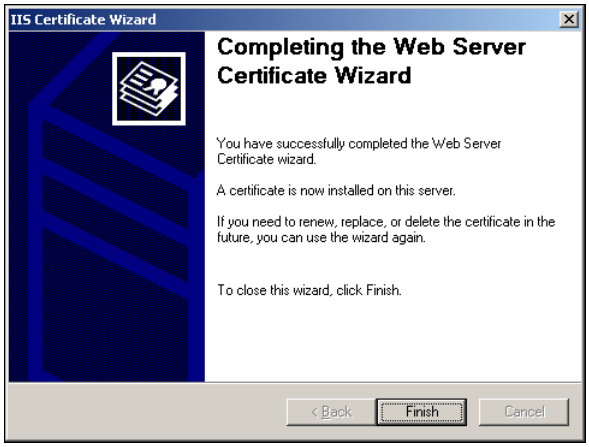
7 Verify that the field contains the path to the file containing the response to the certificate request and click **NEXT**.



8 Accept the default value (unless a different SSL port is required), and click **NEXT**.



9 Review the details and click **NEXT**. The certificate wizard installs the certificate. When installation is complete, you see the following message.



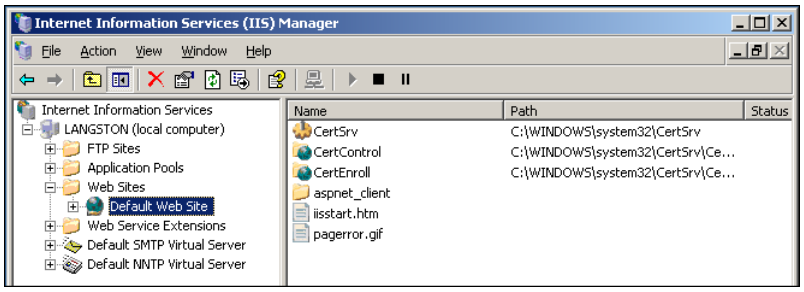
10 Click **FINISH** and then click **OK** to close the **Default Web Site Properties** page.

Enabling SSL on OmtoolDXPWebApp and OmtoolWebAPI

SSL (Secure Sockets Layer) must be enabled on the OmtoolDXPWebApp and the OmtoolWebAPI so that messages and requests can be submitted securely to AccuRoute Intelligent Device Client.

To enable SSL:

1 Start IIS and expand **Default Web Sites** in the console tree.

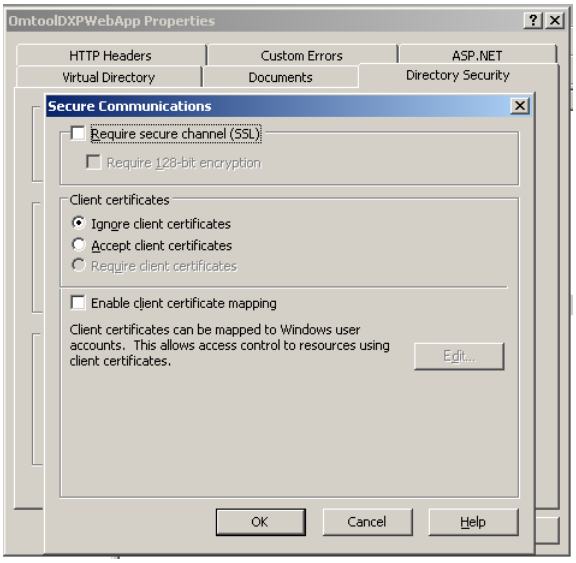


2 Right-click **OMTOOLDXPWEBAPP /OMTOOLWEBAPI** and select **PROPERTIES**.

The Properties page opens.

3 Go to the **DIRECTORY SECURITY** tab.

4 Go to **Secure communications** and click **EDIT**.



5 Select **REQUIRE SECURE CHANNEL (SSL)** and **REQUIRE 128-BIT ENCRYPTION**, and then click **OK**.

6 Click **OK** again to close the **Properties** page.