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# Ricoh Embedded Software Architecture (ESA) Device Client Installation and Integration Guide

For Ricoh Embedded Software Architecture (ESA) Device Client  
v1.2.2

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# Contents

## Section 1: Introduction

Embedded AccuRoute for Ricoh .....	1-1
Main components of the environment.....	1-2
Installation components.....	1-3
Document workflows .....	1-4
Deployment summary.....	1-7
Custom configuration.....	1-7
Modifying the default configuration .....	1-7
Customizing Embedded AccuRoute for Ricoh.....	1-7
Related documentation.....	1-8
AccuRoute server documentation.....	1-8
AccuRoute Desktop documentation.....	1-8
Omtool Web Client documentation.....	1-9
Embedded AccuRoute for Intelligent Devices documentation .....	1-9
Embedded AccuRoute for Ricoh documentation.....	1-9

## Section 2: Requirements

Supported devices.....	2-1
Platform requirements.....	2-2
Server requirements.....	2-2
Installation requirements.....	2-3
Deployment requirements.....	2-3

## Section 3: Installation

Downloading Embedded AccuRoute for Ricoh .....	3-1
Installing Embedded AccuRoute for Ricoh.....	3-1
Installing the Omtool Xlet on the device .....	3-7
Copying the Omtool Xlet files to an SD card .....	3-7
Moving the SD card to the device .....	3-8
Installing and initializing the Omtool Xlet on the device.....	3-9
Removing Embedded AccuRoute for Ricoh from the web server.....	3-12
Removing the Omtool Xlet from the device.....	3-13

## Section 4: Required configuration on the Omtool server

Creating a rule for Routing Sheet features .....	4-2
Creating a rule for Personal Distributions and Public Distributions features .....	4-3
Creating a rule for MyAccuRoute features .....	4-4

## Section 5: Optional configuration

Applying the patch I2895 .....	5-1
Configuring the User PIN Identification.....	5-2
Configuring the auto reset option.....	5-3
Applying patch I4690 .....	5-3

## Section 6: Testing

Testing the Routing Sheet feature.....	6-1
Testing the Public Distributions feature .....	6-3
Testing the Personal Distributions feature .....	6-6
Testing the My AccuRoute feature .....	6-9
Testing the Fax feature .....	6-11

## Section 7: Troubleshooting

Detecting workflow issues.....	7-1
Troubleshooting the delivery mechanism .....	7-2
Troubleshooting the message on the Omtool server .....	7-2
Troubleshooting the web server .....	7-4
Troubleshooting the multifunction device .....	7-4
Troubleshooting merge failure when using remote AccuRoute Intelligent Device Client.....	7-4
Troubleshooting LDAP Authentication Failure.....	7-5

# Section I: Introduction

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

This section includes:

[Embedded AccuRoute for Ricoh](#) (I-1)

[Main components of the environment](#) (I-2)

[Document workflows](#) (I-4)

[Deployment summary](#) (I-7)

[Deployment summary](#) (I-7)

[Custom configuration](#) (I-7)

[Related documentation](#) (I-8)

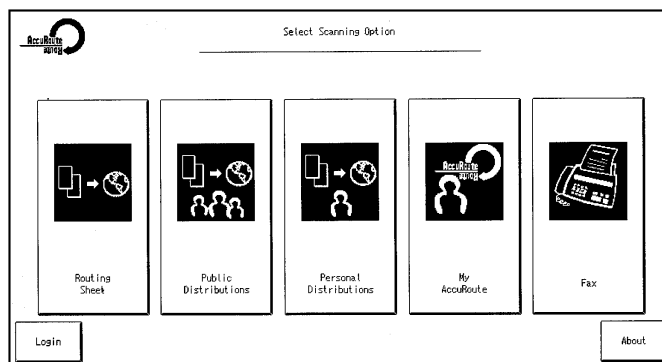
## Embedded AccuRoute for Ricoh

Embedded AccuRoute for Ricoh brings the versatile document routing capabilities of AccuRoute to supported Ricoh, Lanier, Savin, and Gestetner devices. These capabilities are founded on Omtool's Embedded Directive technology.

Embedded AccuRoute for Ricoh runs as a Java xlet called the Omtool Xlet. In the main menu, the Omtool Xlet presents the device user with several AccuRoute scanning features.

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

**Figure I-A: AccuRoute scanning features on the Ricoh device running Embedded AccuRoute for Ricoh**



The display panel shows the 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 I-A: AccuRoute scanning features in Embedded AccuRoute for Ricoh**

Feature	Description	Login required	Notes
Routing Sheet	The user selects Routing Sheet. The device scans the document and it is distributed using the Embedded Directive that was used to create the AccuRoute Routing Sheet.	No	
Public Distributions	The user selects Public Distributions and then selects a public distribution option, or Embedded Directive. The device scans the document and delivers the document to the AccuRoute server via the Embedded AccuRoute for Intelligent Devices (Omttool ISAPI web server extension). The server decodes the Embedded Directive 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 the document and delivers the document to the AccuRoute server via the Embedded AccuRoute for Intelligent Devices (Omttool ISAPI web server extension). The server decodes the Embedded Directive and distributes the document to the intended recipient.	Yes	
My AccuRoute	The user selects My AccuRoute and logs in to the device. The device scans the document and it is distributed using the My AccuRoute preferences of the user.	Yes	My AccuRoute 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 <a href="#">Related documentation</a> on I-8.
Fax	The user selects Fax and enters the fax destination. The device scans the document and it is distributed to the specified fax destination.	No	

## Main components of the environment

The Embedded AccuRoute for Ricoh environment consists of the Omttool server, the web server, and the device.

- **AccuRoute server** - AccuRoute v2.1 or later must be installed.

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

- **Web server** - The following must be installed:
  - ▶ **Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension)** - For more information on installing this application, consult the Embedded AccuRoute for Intelligent Devices installation guide. (Go to [Related documentation](#) on I-8.)

---

**Note**      **AccuRoute v2.2 installs the AccuRoute Intelligent Device Client v2.1.1 as part of the server install. If you are using AccuRoute v2.2, no separate AccuRoute Intelligent Device Client install is required. You can use the same system for the AccuRoute server and the web server.**

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- ▶ **Embedded AccuRoute for Ricoh** - This guide includes instructions on installing Embedded AccuRoute for Ricoh.
- **Device** - The following must be installed:
  - ▶ **SDK/J** - For information, go to [Platform requirements](#) (2-2).
  - ▶ **Omtool Xlet** - This guide includes instructions on installing the Omtool Xlet on the device.

## Installation components

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

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

Component	Setup location	Function
Embedded AccuRoute for Ricoh	network folder where you downloaded the setup files.	The setup contains the setup.exe file. Use this file to install Embedded AccuRoute for Ricoh.
Omtool Xlet files	...\program files\Omtool\ISAPIClients\RicohSDKJ\*	<p>These files are copied to the web server during installation to ... \Omtool\ISAPIClients\RicohSDKJ\* and then uploaded to the device via an SD card.</p> <p>Included are OmtoolXlet.DALP and several JAR files. The DALP file contains important configuration data, such as the network location of the web server and the file postings directory.</p> <p><b>Note: Keep these files on the web server as a backup copy of the Omtool Xlet configuration that is running on the device.</b></p>

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

Component	Setup location	Function
Omtool Xlet configuration data	...\\WebAPI\\Scripts\\OmlSAPIURicoh.xml	<p>This XML file is copied to the web server during installation.</p> <ul style="list-style-type: none"> <li>If you are using AccuRoute v2.1, the file is copied to: C:\\Program Files\\Common Files\\Omtool\\OMISAPIURICOHXML\\Scripts\\</li> <li>If you are using AccuRoute v2.2, the file is copied to: C:\\Program Files\\Omtool\\Omtool Server\\WebAPI\\Omtool\\WebAPI\\Scripts\\</li> </ul> <p>The file supplies the Omtool Xlet with configuration data. It is configured automatically by the setup. Do not modify this file after installation.</p>
Microsoft XML parser	...\\System\\*	<p>These files are installed on the web server.</p> <p>The Microsoft XML parser is used internally by Embedded AccuRoute for Ricoh.</p>

## Document workflows

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

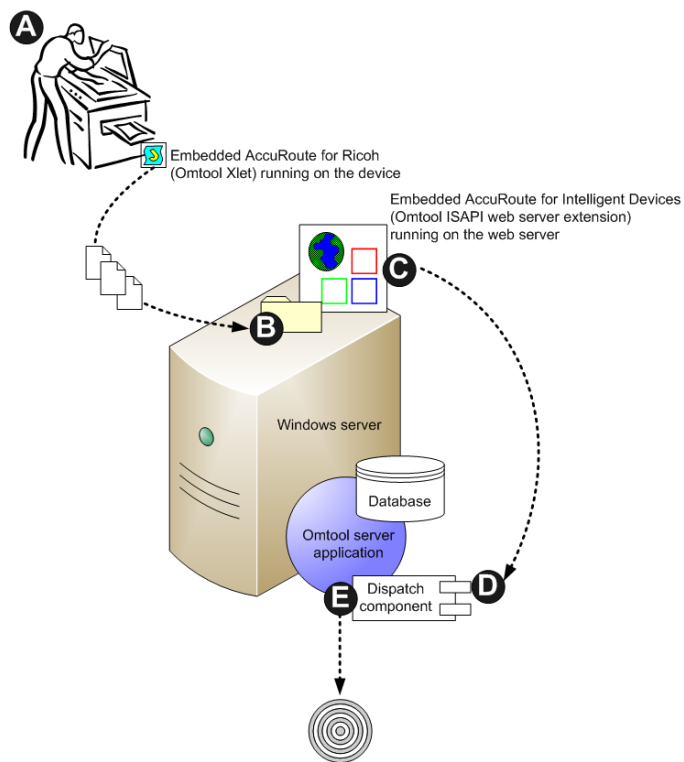
In its most basic workflow, the Omtool Xlet saves files to a directory on the web server, and Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) submits the files directly to the Omtool server. This workflow applies to the features Public Distributions, Routing Sheet and Fax.

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**Important** Important For MyAccuRoute and MyAccuRoute with Scan More features, the device user must authenticate himself at the device using the configured authentication type.

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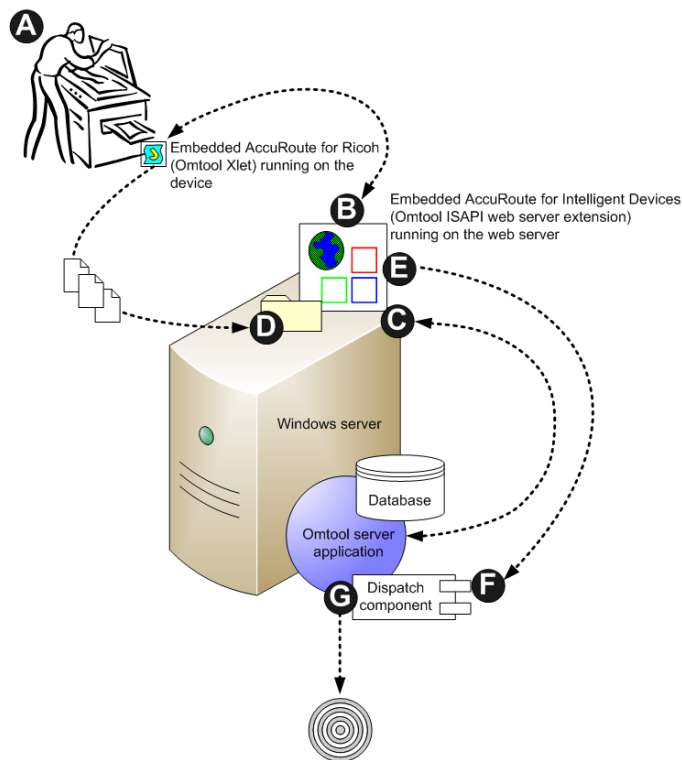


**Figure I-B: Workflow for Personal Distributions, Routing Sheet and Fax**

**A**- The user selects an AccuRoute scanning feature and scans a document. **B** - The Omtool Xlet saves the scanned document and copies the file to the web server. **C** - submits the file to the Omtool server as a "message". **D** - The Dispatch component applies rules to the message, and the server processes the message accordingly.

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

**Figure I-C: Workflow for Public Distributions, and My AccuRoute**



- A** - The user selects Personal Distributions or My AccuRoute scanning feature and the Omtool Xlet submits a request to Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) to authenticate the user. **B** - Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) requests the data from the Omtool server and returns it to the Omtool Xlet. **C** - The Omtool Xlet saves the scanned document and copies the file to the web server. **D** - Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) submits the file to the Omtool server as a "message". **E** - The Dispatch component applies rules to the message, and the Omtool server processes the message accordingly.

# Deployment summary

## To deploy Embedded AccuRoute for Ricoh:

- 1 Complete the installation requirements. ([Section 2: Requirements](#))
- 2 Complete the installation. ([Section 3: Installation](#))
  - a Install Embedded AccuRoute for Ricoh on the web server.
  - b Transfer the Omtool Xlet files to the device.
- 3 Configure the Omtool server. ([Section 4: Required configuration on the Omtool server](#))
- 4 Configure authentication if using User PIN Authentication.
- 5 Test the AccuRoute scanning features on the device. ([Section 6: Testing](#))
- 6 Troubleshoot the setup if necessary. ([Section 7: Troubleshooting](#))

# Custom configuration

By default, Embedded AccuRoute for Ricoh supports one Omtool Xlet configuration. It can be modified or customized to support multiple configurations.

## Modifying the default configuration

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

### To change the default configuration after Embedded AccuRoute for Ricoh has been deployed, reinstall Embedded AccuRoute for Ricoh:

- 1 Remove the Omtool Xlet from the device. (Go to [Removing the Omtool Xlet from the device](#) on 3-13.)
- 2 Remove Embedded AccuRoute for Ricoh from the web server using Add/Remove Programs.
- 3 Run the Embedded AccuRoute for Ricoh setup again using the desired values. (Go to [Installing Embedded AccuRoute for Ricoh](#) on 3-1.)
- 4 Install the Omtool Xlet on the device. (Go to [Installing the Omtool Xlet on the device](#) on 3-7.)

# Customizing Embedded AccuRoute for Ricoh

Embedded AccuRoute for Ricoh can be customized to:

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

- Use custom options for the Fax feature, such as cover pages, additional recipients, default sender name, default subject, delivery confirmation settings, etc.
- Use custom values for the frequency in which the Omtool Java xlet resets the display panel and refreshes its configuration from the web server.
- Override native settings on the device.

For more information, 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/accuroutev22serverinstallationguide.pdf>

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

- **Omtool server installation guide**- <http://www.omtool.com/documentation/omtoolserver/installationguidef331ar201.pdf>
- **AccuRoute v2.1 update readme** - [http://www.omtool.com/documentation/readmes/readme\\_ar21gf34.htm](http://www.omtool.com/documentation/readmes/readme_ar21gf34.htm)

#### Omtool Server Administrator help

- **AccuRoute v2.3** - <http://www.omtool.com/documentation/omtoolserver/v36/admin/index.htm>
- **AccuRoute v2.2** - <http://www.omtool.com/documentation/omtoolserver/v35/admin/index.htm>
- **AccuRoute v2.1** - <http://www.omtool.com/documentation/omtoolserver/v331/admin/>

### AccuRoute Desktop documentation

- **AccuRoute Desktop installation guide** - <http://www.omtool.com/documentation/accuroute/v21/accuroutedesktop/accuroutedesktopinstallationguideV21.pdf>
- **AccuRoute Desktop user guide** - <http://www.omtool.com/documentation/accuroute/v21/accuroutedesktop/accuroutedesktopuserguidev21.pdf>
- **AccuRoute Desktop quick start guide** - <http://www.omtool.com/documentation/accuroute/v21/accuroutedesktop/accuroutedesktopquickstartv21.pdf>

## Omtool Web Client documentation

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

## Embedded AccuRoute for Intelligent Devices documentation

- **Embedded AccuRoute for Intelligent Devices installation guide** - <http://www.omtool.com/documentation/accuroutedeviceintegration/EmbeddedAccuRouteV2IInstallGuide.pdf>

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

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## Embedded AccuRoute for Ricoh documentation

The following quick start guides are designed to be posted near the device, distributed to device users, and published on your organization's intranet:

- Using the Routing Sheet feature
- Using the Public Distributions feature
- Using the Personal Distributions feature
- Using the My AccuRoute feature
- Using the Fax feature

Download these guides from <http://www.omtool.com/documentation/accuroutedeviceintegration/ricoh/EmbeddedAccuRouteRicohV1IQuickStarts.zip>.



# Section 2: Requirements

This section includes:

- [Supported devices](#) (2-1)
- [Platform requirements](#) (2-2)
- [Server requirements](#) (2-2)
- [Installation requirements](#) (2-3)
- [Deployment requirements](#) (2-3)

## Supported devices

Omtool qualified Embedded AccuRoute for Ricoh with the Ricoh Aficio 2051.

Ricoh Corporation certified the following devices with the Embedded Software Architecture, the platform that supports Embedded AccuRoute for Ricoh. For more information on Embedded Software Architecture platform, see [Platform requirements](#):

- **Ricoh Aficio models** - 2051/2060/2075, 3260C/Color5560, 3234C/3245C/3228C, 480W(Dolphin-C2exp), 3224C/3232C, 3035/3045, 3025/3030, CL4000DN, AP900, AP610N, AP410N, CL7300/CL7200, and CL3200N.
- **Lanier models** - LD151, LD160, LD175, LD124c, LD160c, LC155, LD328c, LD335c, LD345c, LW411, LD235, LD245, LD225, and LD230.
- **Savin models** - 4051, 4060, 4075, C2410, C6045, SDC555, C2824, C3528, C4535, 4800WD, 8035, 8045, 8025, and 8030.
- **Gestetner models** - DSm651, DSm660, DSm675, DSc424, DSc460, CSS55, DSc428, DSc435, DSc445, A080, DSm735, DSm745, DSm725, and DSm730.

Omtool supports Embedded AccuRoute for Ricoh with all devices listed in this section.

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**Important** It is important that you check the version of SDK/J running on your Ricoh device. As long as the Ricoh device is running a version of Java that was tested in the Omtool laboratory, the Embedded AccuRoute for Ricoh will work with the Ricoh device.

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The following table lists the Ricoh devices that were used in the Omtool laboratory to qualify the Embedded AccuRoute for Ricoh. For each device, the version of SDK/J it was tested against, SD card type, Omtool server and Intelligent Device Client versions are listed as well.

*Table 1. Embedded AccuRoute for Ricoh Support*

Ricoh device	Embedded Software Architecture (SDK/J)	JAVA(SD) Card	Omtool Server	AccuRoute Intelligent Device Client
Aficio 205 I SP	v1.2 and v1.3	Type B	v2.1	v2.1
Aficio 205 I SP	v1.4	Type B	v2.1	v2.1.1
MP C2500 & MP C3000	v2.0	Type C	v2.1	v2.1.1
Aficio 205 I SP	1.4	Type B	v2.2	Built in the v2.2 server by default
MP C2500 & MP C3000	v2.0	Type C	v2.2	Built in the v2.2 server by default

## Platform requirements

The SDK/J platform, known as Embedded Software Architecture, must be installed on an SD card that remains in the service slot whenever the device is powered on. For information on which card type to order, check the version of the SDK/J installed on the device.

To check the version of the SDK/J platform installed on the device, start the Application Manager. The version is displayed in the top right corner.

- To purchase SDK/J platform v1.4, v1.3 or v1.2, contact your device vendor and request VM CARD TYPE B (EDP #413133).
- To purchase SDK/J platform v2, contact your device vendor and request VM CARD TYPE C (EDP #413210).

## Server requirements

Embedded AccuRoute for Ricoh requires:

- Omtool server running AccuRoute v2.1 or later (must be fax-enabled to support fax-based features)
- web server running Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension)

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**Note** AccuRoute v2.2 or higher installs the AccuRoute Intelligent Device Client v2.1.1 as part of the server install. If



you are using AccuRoute v2.2, no separate AccuRoute Intelligent Device Client install is required.

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- Patch 12895 (required for AccuRoute v2.1 and v2.2 only)- This is needed for User PIN authentication.
- Patch 14690 (required for AccuRoute v2.1 and v2.2 only)- This is needed when using remote AccuRoute Intelligent Device Client.

You can use the same system to install the AccuRoute server and the web server running Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension).

## Installation requirements

The installation requires:

- vacant SD card service slot on the device
- formatted SD card with 1MB of free space
- SD card reader
- unique e-mail address for the Public Distributions feature (When Embedded AccuRoute for Ricoh is installed without the Public Distributions feature, this requirement does not apply.)

## Deployment requirements

Additional requirements apply for deployment:

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

can create Embedded Directives and Routing Sheets). Additionally, My AccuRoute must be configured in AccuRoute Desktop and on the server.

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

## Section 3: Installation

This section includes:

[Downloading Embedded AccuRoute for Ricoh](#) (3-1)

[Installing Embedded AccuRoute for Ricoh](#) (3-1)

[Installing the Omtool Xlet on the device](#) (3-7)

[Removing Embedded AccuRoute for Ricoh from the web server](#) (3-12)

[Removing the Omtool Xlet from the device](#) (3-13)

Remove any prior version of Embedded AccuRoute for Ricoh if it is installed on the web server system using the Add/Remove Programs applet. Then remove the Omtool Xlet from the device following instructions in [Removing the Omtool Xlet from the device](#) (3-13).

## Downloading Embedded AccuRoute for Ricoh

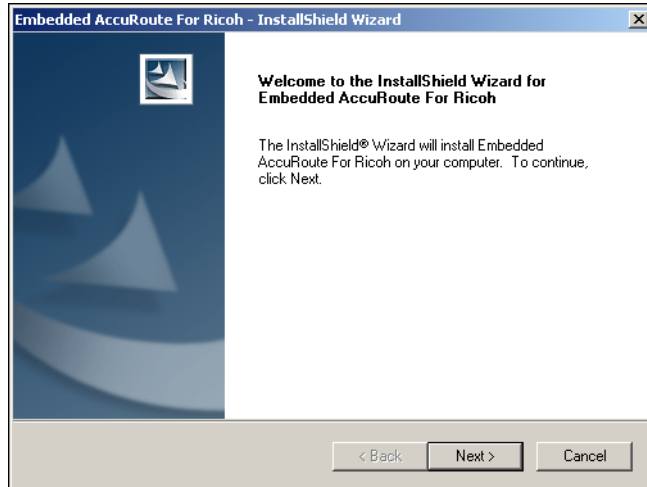
### To download Embedded AccuRoute for Ricoh setup

- 1 Go to <http://www.omtool.com/support>.
- 2 Log in using your customer number.
- 3 Locate the module in the **DOWNLOADS AND DOCS** section.
- 4 Download the module and save it to a local drive.
- 5 Extract the files to a location on the system running the Embedded AccuRoute for Intelligent Devices(Omtool ISAPI web server extension).

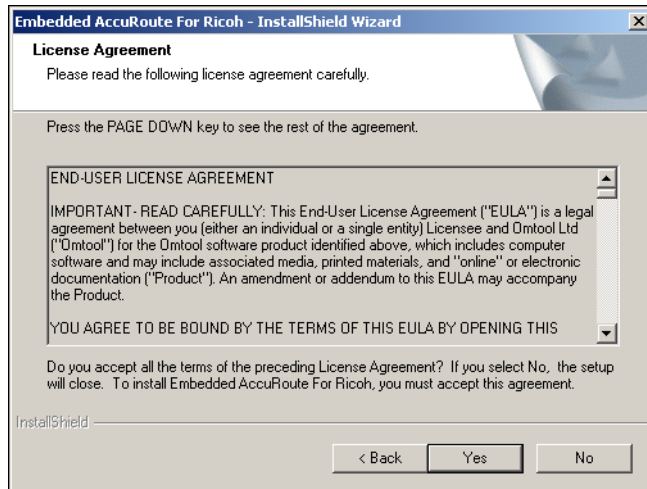
## Installing Embedded AccuRoute for Ricoh

### To install Embedded AccuRoute for Ricoh on the web server:

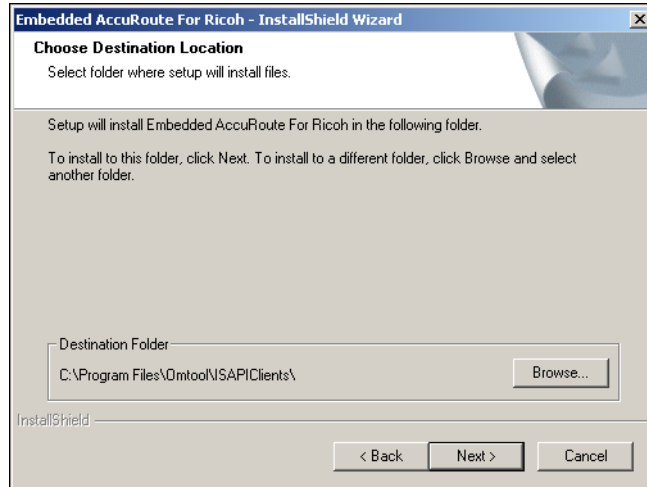
- 1 Log on to the system running Embedded AccuRoute for Intelligent Devices (Omtool ISAPI web server extension) using an account that belongs to the Administrators group.
- 2 Go to the folder containing the Embedded AccuRoute for Ricoh setup and run **SETUP.EXE**. The InstallShield Wizard configures the system and shows a welcome message.



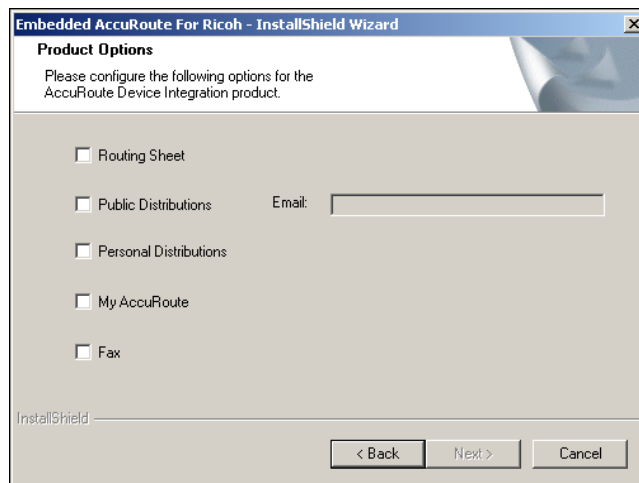
- 3 Click **NEXT**. The InstallShield Wizard shows the license agreement.



- 4 Read the license agreement. Click **YES** if you agree to the terms. The InstallShield Wizard shows the destination folder.



- 5 Set the destination folder and click **NEXT**. The InstallShield Wizard shows product options.

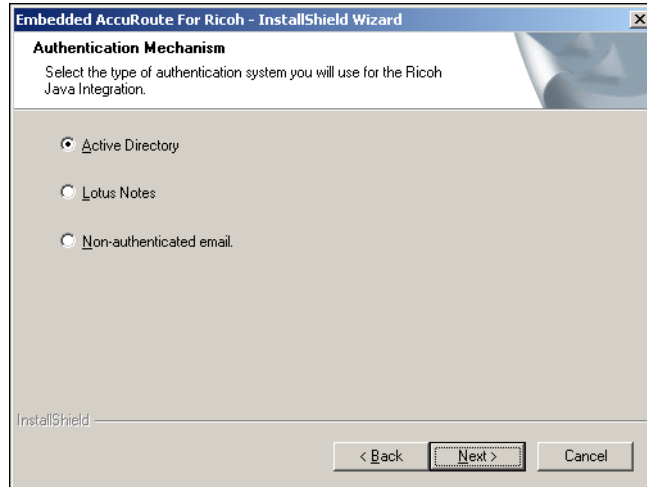


- 6 Select AccuRoute scanning features. For more information, consult [Table I-A: AccuRoute scanning features in Embedded AccuRoute for Ricoh](#) on I-2.

If you choose the Public Distributions option, you must specify an email address. All Embedded Directives for this user that are published as public will be listed under Public Distribution options. If you do not specify the email address, you get an error message prompting you to specify the email address.

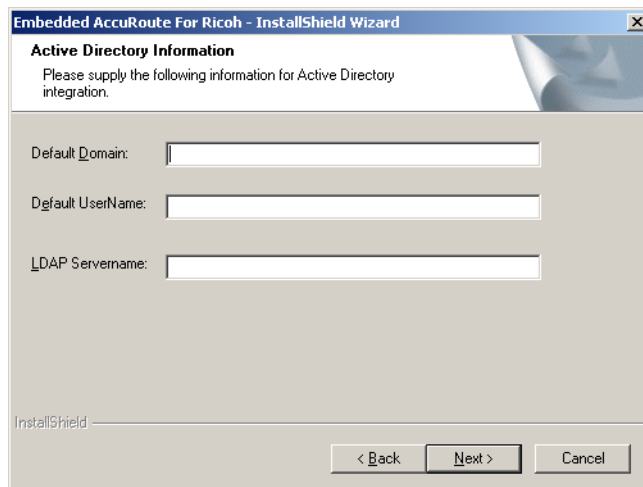


- 7 Click **NEXT**. The **Authentication Mechanism** page opens.

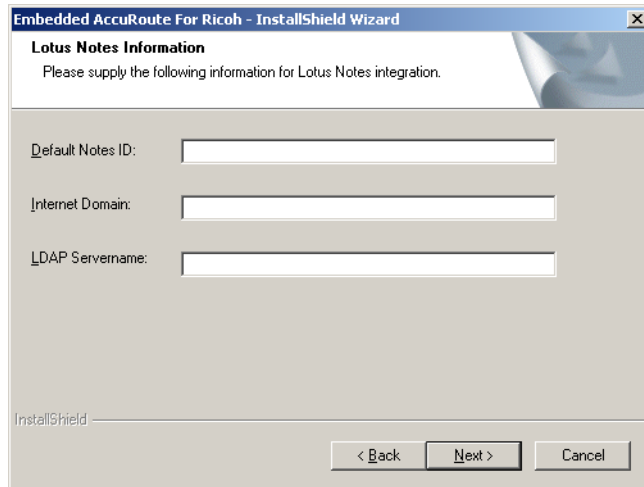


- 8 Specify the authentication method for the **PERSONAL DISTRIBUTIONS** and **MY ACCURROUTE** features.
- ▶ Choose **ACTIVE DIRECTORY** to set up authentication using an Active Directory. After the user is authenticated, the Omtool Xlet requests the list of Embedded Directives associated with the user.
 

You should also choose this option if you want to set up authentication using **User PIN Identification** feature. For information on how to configure User PIN Identification, see [Configuring the User PIN Identification](#) (5-2).
  - ▶ Choose **LOTUS NOTES** to set up authentication using Lotus Notes. After the user is authenticated, the Omtool Xlet requests the list of Embedded Directives associated with the user.
  - ▶ Choose **NON-AUTHENTICATED EMAIL** if you do not want the authenticate the device users. The Omtool Xlet requests the list of Embedded Directives associated with the e-mail address entered on the device.
- 9 Click **NEXT**. Based on your choice of authentication, the configuration settings page for Active Directory, Lotus Notes, or non-authenticated e-mail opens.
- If you selected Active Directory, the **Active Directory Information** page opens.

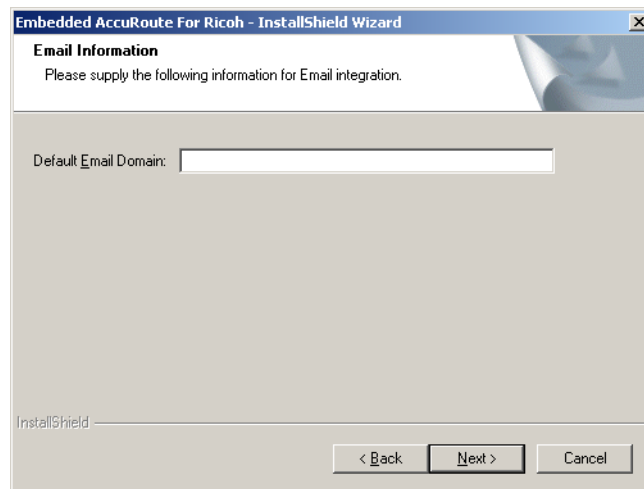


- If you selected Lotus Notes, the Lotus Notes Information page opens.



The screenshot shows a dialog box titled "Embedded AccuRoute For Ricoh - InstallShield Wizard". The main heading is "Lotus Notes Information" with the instruction "Please supply the following information for Lotus Notes integration." Below this, there are three text input fields: "Default Notes ID:", "Internet Domain:", and "LDAP Servername:". At the bottom left, the text "InstallShield" is visible. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

- If you selected Non-authenticated email, the Email Information page opens.



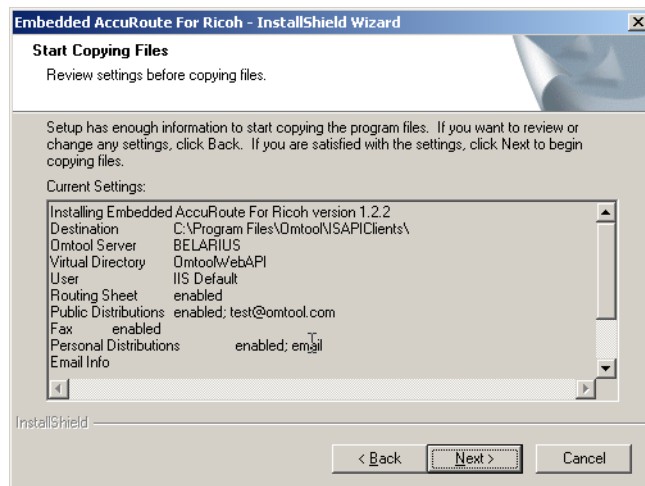
The screenshot shows a dialog box titled "Embedded AccuRoute For Ricoh - InstallShield Wizard". The main heading is "Email Information" with the instruction "Please supply the following information for Email integration." Below this, there is one text input field: "Default Email Domain:". At the bottom left, the text "InstallShield" is visible. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

- 10** Configure user authentication for the Omtool Xlet based on the information in [Table 1. Configuration settings for device user authentication](#) on 3-6

Table 1. Configuration settings for device user authentication

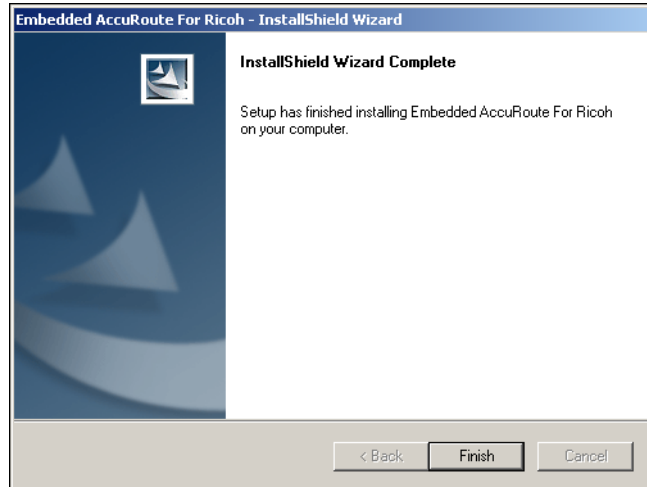
Authentication method	Configuration settings
Active Directory	<ul style="list-style-type: none"> <li>• <b>Default Domain</b> - Default Windows NT domain name that appears on the device, for example, production. (Do not use the fully qualified domain name, for example, production.omtool.com or omtool.com.) The device user can change this value when logging in. Use an empty value to display a blank field.</li> <li>• <b>Default User Name</b> - Default user name that appears on the device. The device user can change this value when logging in.</li> <li>• <b>LDAP Servername</b> - Computer name or IP address of the server that hosts the global catalog. This value does not appear on the device.</li> </ul>
Lotus Notes	<ul style="list-style-type: none"> <li>• <b>Default Notes ID</b> - Default user name that appears on the device. Use an empty value to display a blank field.</li> <li>• <b>Internet Domain</b> - Default Internet domain of the login user. Use the fully qualified domain name (for example, sales.business.omtool.com). The device user can change this value when logging in. Use an empty value to display a blank field.</li> <li>• <b>LDAP Servername</b> - Computer name or IP address of the Domino server. This value does not appear on the device.</li> </ul>
Non-authenticated email	<ul style="list-style-type: none"> <li>• <b>Default Email Domain</b> - Default e-mail domain that appears on the device. The e-mail domain is the entire value that appears after the symbol @ in an e-mail address (for example, omtool.com). The device user can change this value when logging in. Use an empty value to display a blank field.</li> </ul>

11 Click **NEXT**. The InstallShield Wizard window shows current installation settings.



12 Click **NEXT**. The setup installs Embedded AccuRoute for Ricoh and the InstallShield Wizard window shows a message indicating that the installation was successful.





**13** Click **FINISH**.

---

**Note** To configure User Pin Authentication, see [Configuring the User PIN Identification \(5-2\)](#).

---

## Installing the Omtool Xlet on the device

To install the Omtool Xlet, complete these procedures in the order they appear:

[Copying the Omtool Xlet files to an SD card \(3-7\)](#)

[Moving the SD card to the device \(3-8\)](#)

[Installing and initializing the Omtool Xlet on the device \(3-9\)](#)

## Copying the Omtool Xlet files to an SD card

**To copy the Omtool Xlet to an SD card:**

- 1** Go to a system with an SD card reader and log in.
- 2** Insert the SD card into the card slot. (The photo shows an external USB card reader.)



- 3 Browse to the Embedded AccuRoute for Ricoh setup on the network and go to `...\\Omtool\ISAPIClients\RicohSDK\`. (Map a drive to the web server if necessary.)
- 4 Copy `\sdk` to the root level of the SD card.
- 5 Verify that the SD card contains several JAR files and `OmtoolXlet.DALP`. These files are located in `\sdk\dSDK\dist\33960192\`.
- 6 Remove the SD card. (Use the safe removal procedure for the card reader. Consult the manufacturer's documentation for more information.)

Continue to [Moving the SD card to the device](#).

## Moving the SD card to the device

---

**Important** Turn off the main power to the device before inserting or removing an SD card.

---

### To move the SD card to the device:

- 1 Go to the device and turn off the main power.  
The procedure involves shutting down the control panel and turning off the power. Consult the device documentation for more information.
- 2 Locate a vacant service slot on the device. (The location of service slots varies by device. The photo shows a Ricoh device with three service slots. One slot is vacant.)



- 3 Insert the SD card into the service slot.



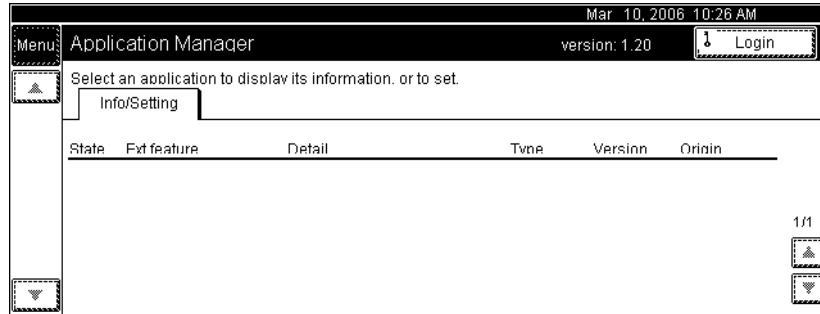
- 4 Turn on the main power and wait for the device to initialize.

Continue to [Installing and initializing the Omtool Xlet on the device.](#)

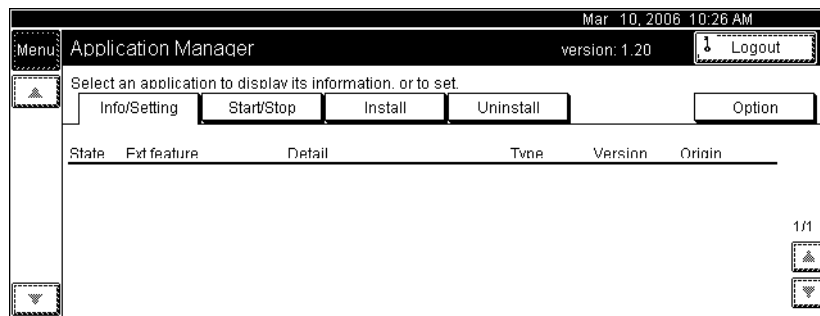
## Installing and initializing the Omtool Xlet on the device

### To install the Omtool Xlet on the device:

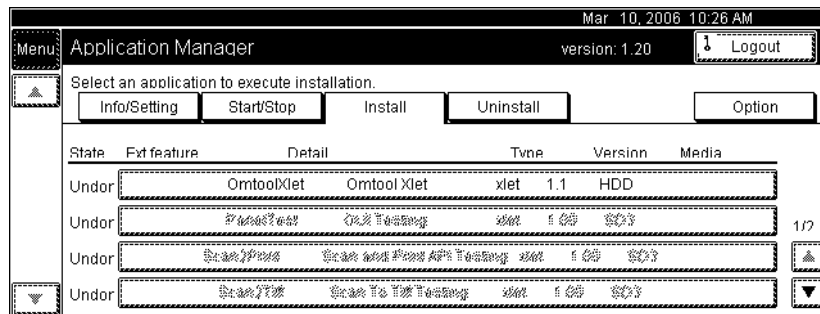
- 1 Press the **SCANNER** function button and press **JAVA™ PLATFORM** on the display panel. The display panel shows the Application Manager.



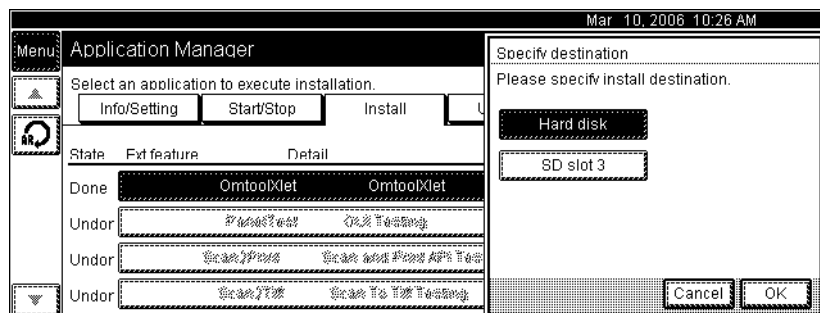
- 2 Press **LOGIN** and log in to the Application Manager.



- 3 Press the **INSTALL** tab.



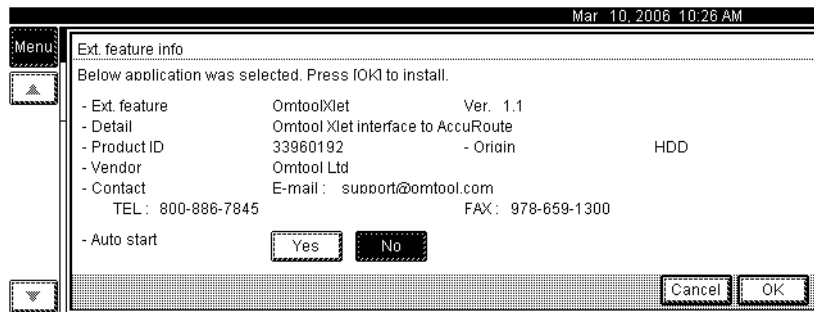
- 4 Press **OMTOOLXLET** in the feature list. The display panel shows the Specify destination screen.



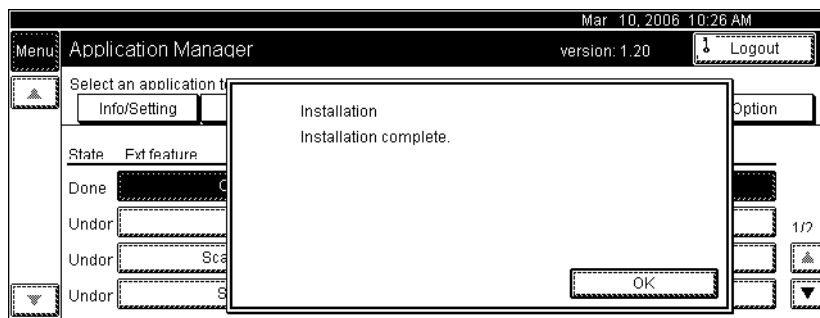
- 5 Select a location for the installation.

The Omtool Xlet can be installed on the hard disk or SD card. If the Omtool Xlet is installed on an SD card, the card must remain in the slot whenever the device is running.

- 6 Press **OK**. The display panel shows feature information on the Omtool Xlet.



- 7 Press **YES** if the Omtool Xlet should start automatically when the Application Manager starts, and then press **OK** to install the Omtool Xlet. The Application Manager installs the Omtool Xlet and displays a confirmation dialog box.

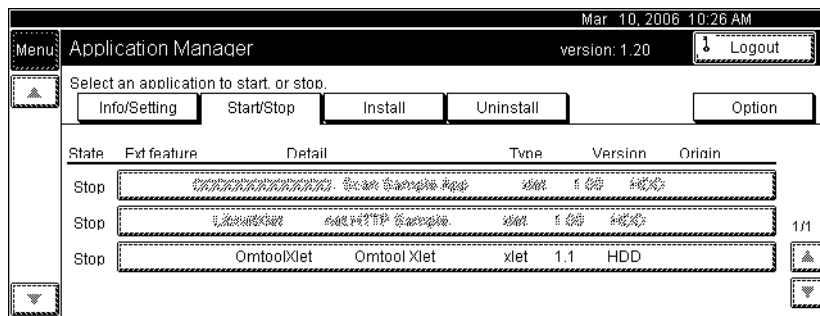


- 8 Press **OK**.

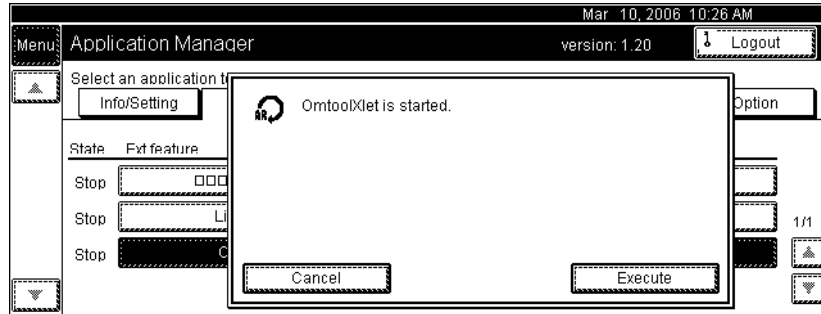
The installation is complete. Now initialize the Omtool Xlet.

**To initialize the Omtool Xlet:**

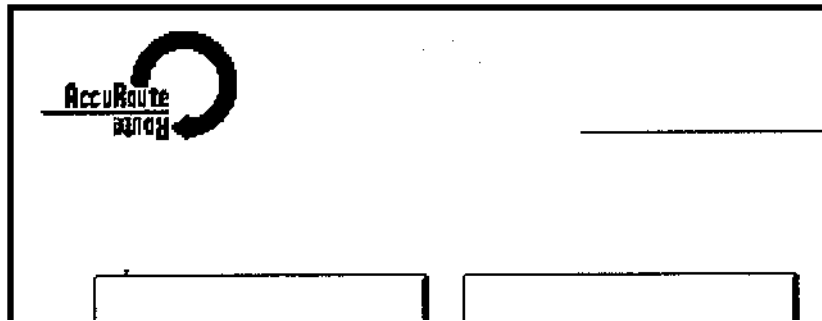
- 1 Press the **START/STOP** tab.



- 2 Press **OMTOOLXLET**. The Application Manager displays the message “OmtoolXlet is started”.



- 3 Press **EXECUTE**. The Application Manager starts the Omtool Xlet and adds a button with an AccuRoute symbol to the xlet menu. The display panel shows the AccuRoute scanning features that are enabled on the device.



The Omtool Xlet is running on the device.

---

*Note* Some AccuRoute scanning features do not work correctly until additional configuration has been completed.

---

Go to [Section 4: Required configuration on the Omtool server.](#)

## Removing Embedded AccuRoute for Ricoh from the web server

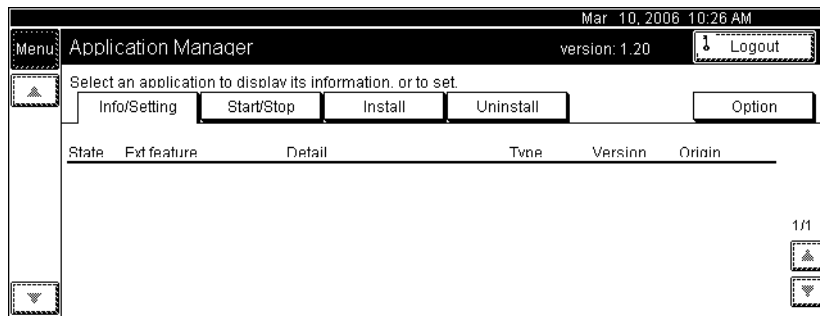
**To remove Embedded AccuRoute for Ricoh from the web server:**

- 1 Go to the **CONTROL PANEL** and start **ADD OR REMOVE PROGRAMS**.
- 2 Select **EMBEDDED ACCURROUTE FOR RICOH** and click **CHANGE/REMOVE**.
- 3 Follow the prompts to remove Embedded AccuRoute for Ricoh.

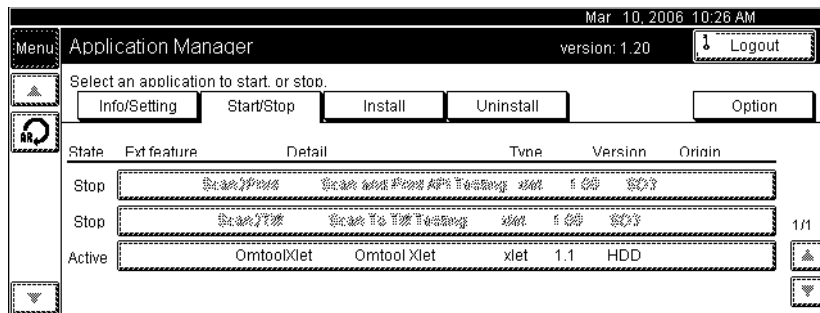
# Removing the Omtool Xlet from the device

**To remove the Omtool Xlet from a device:**

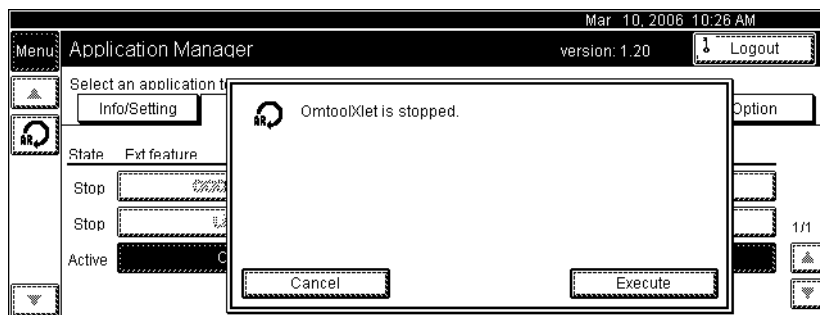
- I Go to the device and stop the Omtool Xlet:
  - a Press **MENU** in the xlet menu. This loads the Application Manager.
  - b Press **LOGIN** and log in to the Application Manager.



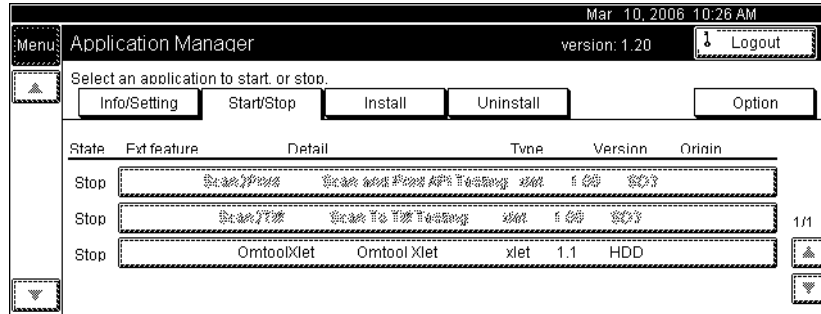
- c Press the **START/STOP** tab and verify that the state of the Omtool Xlet is Active.



- d Press **OMTOOLXLET** in the feature list. The Application Manager displays the message "OmtoolXlet is stopped".

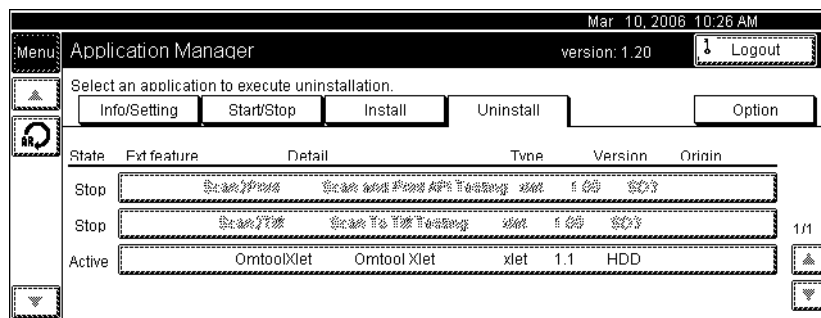


- e Press **EXECUTE** and verify that the state of the Omtool Xlet is Stop.

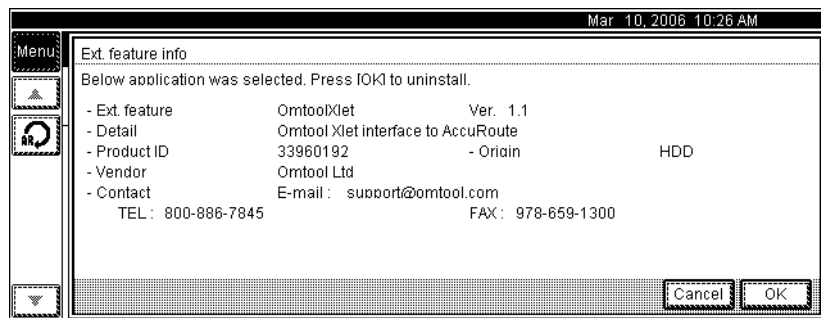


2 Remove the Omtool Xlet from the device:

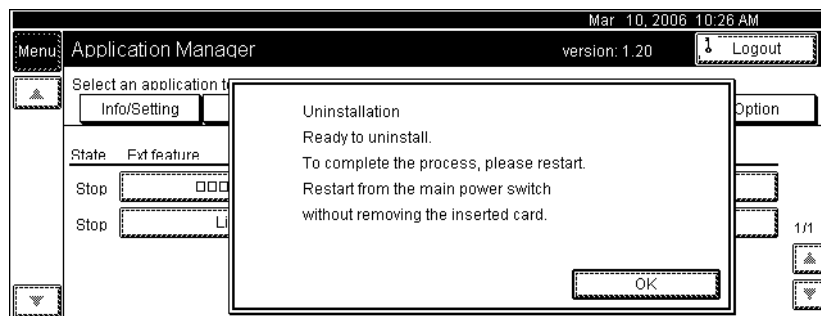
a Press the **UNINSTALL** tab.



b Press **OMTOOLXLET** in the feature list. The Application Manager displays extended feature information on the Omtool Xlet.

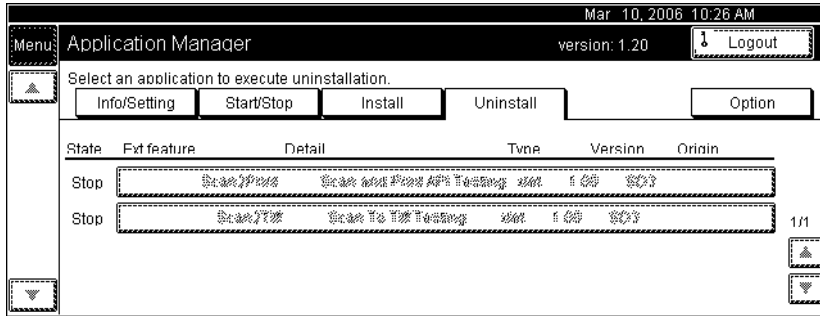


c Press **OK** to remove the Omtool Xlet. The Application Manager displays a message.



d Press **OK**. Verify that Omtool Xlet does not appear in the feature list.





- e Perform a hard reset on the device. Consult the documentation on the device for more information.



# Section 4: Required configuration on the Omtool server

This section includes:

[Creating a rule for Routing Sheet features](#) (4-2)

[Creating a rule for Personal Distributions and Public Distributions features](#) (4-3)

[Creating a rule for MyAccuRoute features](#) (4-4)

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.

If you are using AccuRoute v2.2, create rules based on the AccuRoute scanning features available on devices in your environment. The rule required for the Fax feature uses the default Telco rule created automatically on an Omtool server with a Telco connector.

---

*Important*      In Accuroute v2.3, the routing rules required for using the AccuRoute scanning features on multifunction devices are created by default.

---

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 Ricoh. 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 Ricoh 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|accuroute`, click **ADD**.
  - c Click **FINISH**. The Create New Rule wizard adds the criteria to the rule.
  - d Click **NEXT**.
- 4 Create the action for this rule:
  - a Click **ADD**, select **ROUTE TO EMBEDDED DIRECTIVE MANAGER** in the actions list.
  - b Click **NEXT**.
  - c Verify that **SCAN DOCUMENT(S) FOR EMBEDDED DIRECTIVE** is selected.
  - d Click **FINISH**. The Create New Rule wizard adds the action to the rule.
  - e Click **NEXT**.
- 5 Click **NEXT** to bypass the failover actions screen.
- 6 Verify that **STOP PROCESSING OTHER RULES** is selected and click **FINISH**.  
The new outbound rule opens in the details pane.

---

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

---

# Creating a rule for Personal Distributions and Public Distributions features

When a device user selects the Public Distribution/Personal Distributions feature and scans a document, the Embedded AccuRoute for Ricoh 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 Ricoh 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 > OMT00L > OMT00L 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 **MYACCUR0UTE**, 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.

# Section 5: Optional configuration

This section includes:

[Applying the patch I2895](#) (5-1)

[Configuring the User PIN Identification](#) (5-2)

[Configuring the auto reset option](#) (5-3)

## Applying the patch I2895

---

*Important*      Environments with AccuRoute v2.3 or higher do not need to apply the patch.

---

Patch I2895 is available as a separate download for purchase. For information on how purchase the patch, contact [Omtool Sales](#).

### To download patch I2895

- 1 Go to <http://www.omtool.com/support>.
- 2 Log in using your customer number issued by Omtool when you purchased Patch I2895.
- 3 Locate the patch in the **DOWNLOADS AND DOCS** section.
- 4 Download the patch and save it to a location on the system running the Embedded AccuRoute for Intelligent Devices(Omtool ISAPI web server extension).

### To apply the patch:

Copy the patch files to the following location:

- ▶ If you are running AccuRoute v2.2, copy the patch files to:  
**C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\WEBAPI\OMTOOLWEBAPI\SCRIPTS**
- ▶ If you are running AccuRoute v2.1, copy the patch files to:  
**C:\PROGRAM FILES\COMMON FILES\OMTOOL\WEBAPI\SCRIPTS**

# Configuring the User PIN Identification

**Note** If you are using Accuroute v2.1 or v2.2, apply patch I2895 before proceeding with the instructions below.

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

## To configure the omISAPIURicoh.xml, follow these steps:

- 1 Open omISAPIURicoh.xml for editing.
  - ▶ If you are running AccuRoute v2.2 or higher, navigate to **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\WEBAPI\OMTOOLWEBAPI\SCRIPTS\** and open the xml file.
  - ▶ If you have AccuRoute v2.1, navigate to **C:\PROGRAM FILES\COMMON FILES\WEBAPI\SCRIPTS\** and open the xml file.
- 2 Make the changes to each of the nodes following the instructions in the table.

**Note** To use User PIN Identification feature, the validation type set during Embedded AccuRoute for Ricoh installation must be Active Directory. For more information, see [Installing Embedded AccuRoute for Ricoh \(3-1\)](#)

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

XML Node	Explanation
<Label 1>	Enter an appropriate label for the user PIN Identification prompt. Examples are "Employee ID" or "Employee PIN". <b>Note: There is a character limit to the label value.</b>
<Label 2>	Enter an appropriate label for the password prompt, if necessary.
<UserIDMask>	Enter the mask value that applies to the ID/PIN that device users will use. The user ID/PIN entered by the device user is validated only if it matches the mask pattern. For example, say a UserID mask is A[0-9][0-9]. In this example, all valid user ID should start with "A" followed by two numeric digits. In this case if the device user enters an ID of A8, it would not be validated and the ID contains too few digits.
<SearchBase>	Enter the full domain name in the LDAP SEARCHBASE field. For example, if your full domain name is test.mycompany.com, enter dc=test, dc=mycompany,dc=com
<AttributeName>	Enter the actual attribute name that is defined in the Active Directory. If this attribute prompts for password, you must set <Label2> that contains the value for the password prompt. Examples are employeeID, TimeKeeper ID.

- 3 After you finish making necessary change, save the file.
- 4 Restart the World Wide Web Publishing service.



## Configuring the auto reset option

Device users can scan documents with large number of pages only if the default auto reset time of 30 seconds is changed to a higher value.

**To configure the auto reset option, follow these steps:**

- 1 Open `omISAPIURicoh.xml` for editing.
  - ▶ If you are running AccuRoute v2.2, navigate to **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\WEBAPI\OMTOOLWEBAPI\SCRIPTS\** and open the xml file.
  - ▶ If you are running AccuRoute v2.1, navigate to **C:\PROGRAM FILES\OMTOOL\WEBAPI\SCRIPTS\** and open the xml file.
- 2 Under the `<AutoReset>` node, go to the `<Timeout>` node.
- 3 Change the time seconds from 30 to 300 or a time that is appropriate for your environment.
- 4 Save you changes.
- 5 Restart the World Wide Web Publishing service.

## Applying patch I4690

---

*Important*      Environments with AccuRoute v2.3 or higher do not need to apply the patch.

---

Apply this patch only if you meet the following pre-conditions:

- you applied patch I2895
- you have a remote AccuRoute Intelligent Device Client.

**To download patch I4690:**

- 1 Go to <http://www.omtool.com/support>.
- 2 Log in using your customer number.
- 3 Locate the patch in the **DOWNLOADS AND DOCS** section.
- 4 Download the patch and save it to a location on the system running the Embedded AccuRoute for Intelligent Devices(Omtool ISAPI web server extension).

**To apply patch I4690:**

- 5 Save the patch files in the system running the web server.
- 6 Replace existing `omfGFInterfacesps.dll` located under **C:\PROGRAM FILES\COMMON FILES\OMTOOL** directory with the corresponding file from the patch.
- 7 Register `omfGFInterfacesps.dll` file.
- 8 Navigate to **C:\PROGRAM FILES\COMMON FILES\OMTOOL** directory and create the **DATALOGICS** directory.
- 9 Copy all the other files and subdirectories from the patch into this directory.

---

*Note*            *Note: omfGFInterfacesps.dll need not be copied.*

---

- 10 Register `omfGFDatalogicsU.dll` file.

# Section 6: Testing

This section includes:

- [Testing the Routing Sheet feature \(6-1\)](#)
- [Testing the Public Distributions feature \(6-3\)](#)
- [Testing the Personal Distributions feature \(6-6\)](#)
- [Testing the My AccuRoute feature \(6-9\)](#)
- [Testing the Fax feature \(6-11\)](#)

## Testing the Routing Sheet feature

### To test the Routing Sheet feature:

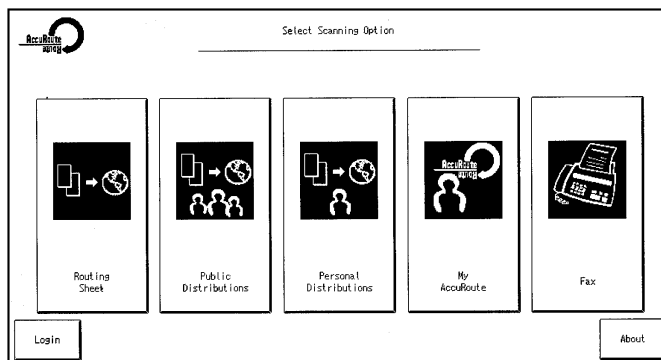
- 1 Create at least one Embedded Directive with your user account.


---

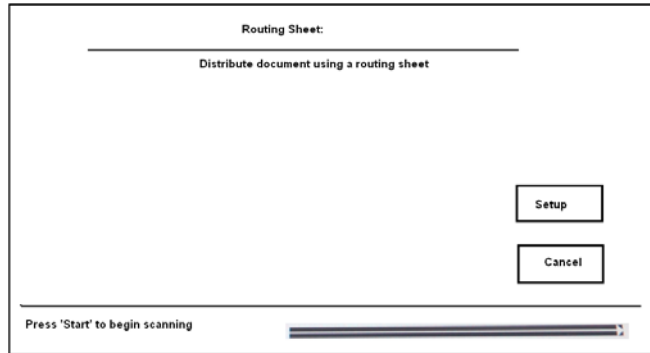
**Note** Applications that can create Embedded Directives include AccuRoute Desktop, AccuRoute Client, and the Omtool Web Client.

---

- 2 Generate and print a Routing Sheet using AccuRoute Desktop, the AccuRoute Client, or the Omtool Web Client.
- 3 Assemble a test document and add the Routing Sheet to the front of the document. Then go to the device. The main screen looks like this:



If the display panel does not show AccuRoute scanning features, press the function button with the  icon. This will display the AccuRoute main menu.

**4 Press ROUTING SHEET.****5 Load your document.**

- **To use the automatic document feeder:** Load the document into the automatic document feeder.
- **To use the exposure glass:** Lift the cover, place an original on the exposure glass, close the cover.

**6 Press START.**

The device scans the document and shows the following message.



- 7 To scan additional pages, repeat the process. When finished, press **#** on the keypad.
- 8 Press **OK**. The device shows the following message.



- 9 To scan another document, press **YES**, and go to step 5.
- 10 To go back to the main AccuRoute page, press **NO**.
- 11 Wait a few minutes and check the recipient address or destination to confirm delivery.  
If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to [Section 7: Troubleshooting](#).

## Testing the Public Distributions feature

### To test the Public Distributions feature:

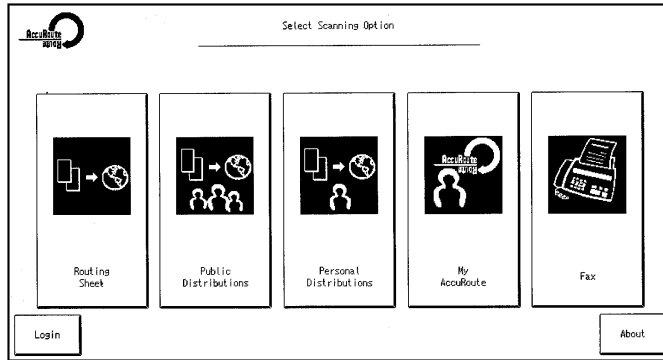
- I Create at least one Embedded Directive with the user account that is associated with the Public Distributions feature. The Embedded Directive must allow multiple use.


---

**Note** Applications that can create Embedded Directives include AccuRoute Desktop or the Omtool Web Client.

---

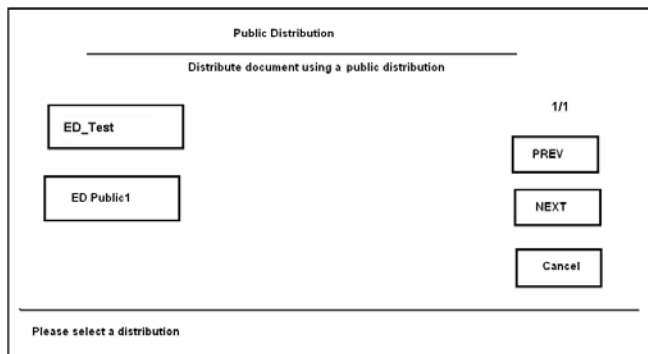
- 2 Assemble a test document and go to the device. The main AccuRoute screen looks like this.



If the display panel does not show AccuRoute scanning features, press the function button that has the  icon. This will display the AccuRoute main menu.

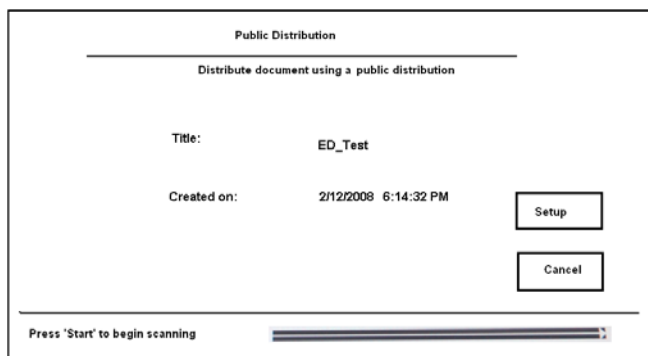
- 3 Press **PUBLIC DISTRIBUTIONS**.

The device shows the public distribution options.



- 4 Select a public distribution option.

The display panel shows a summary of this document distribution option.

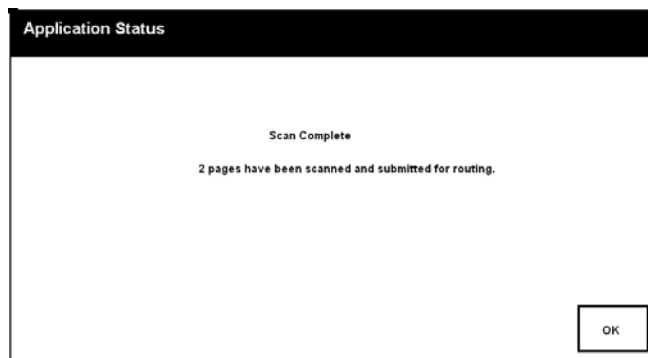


- 5 Load your document.

- **To use the automatic document feeder:** Load the document into the automatic document feeder.
- **To use the exposure glass:** Lift the cover, place an original on the exposure glass, close the cover.

**6** Press **START**.

The device scans the document and shows the following message.

**7** Repeat the process to scan additional pages. When finished, press **#** on the keypad.**8** Press **OK**. The device shows the following message.**9** To scan another document, press **YES**, and go to step 5.**10** To go back to the main AccuRoute page, press **NO**.**11** Wait a few minutes and check the recipient address or destination to confirm delivery.

If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to [Section 7: Troubleshooting](#).

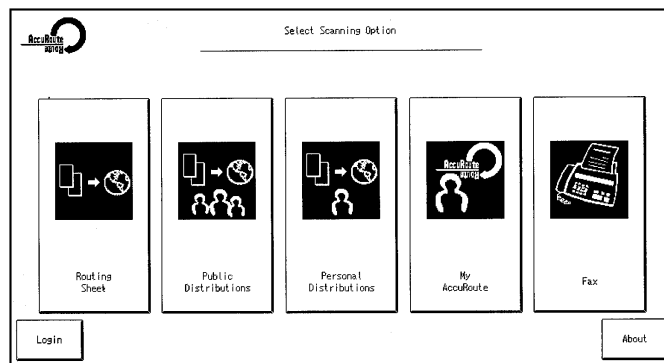
# Testing the Personal Distributions feature


## To test the Personal Distributions feature:

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

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

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



If the display panel does not show AccuRoute scanning features, press the function button that has the  icon. This will display the AccuRoute main menu.

- 3 Press **PERSONAL DISTRIBUTIONS**. The device prompts you to log in.

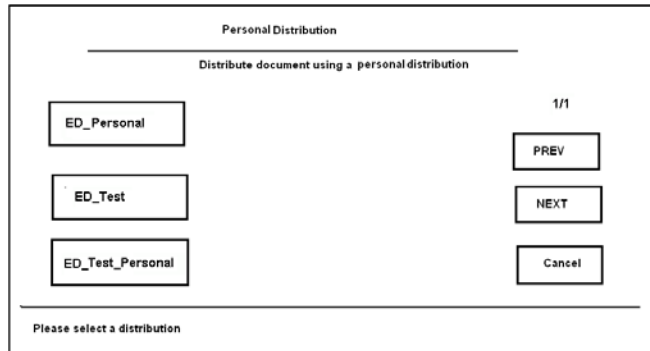
If you are configured to use Active Directory as your authentication option, you see the following page.

- 4 Log in with to the account you used to create the Embedded Directive by following the steps below:
  - a Press **KEYBOARD**.
  - b Enter the user ID in the keyboard that opens.



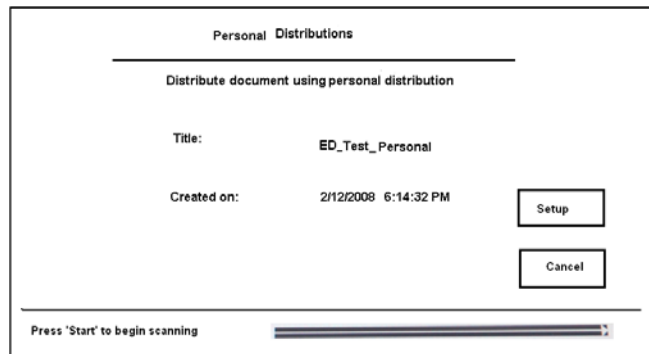
c Press **OK**.

The device shows your personal distribution options.



5 Select a personal distribution.

The display panel shows a summary of this document distribution option.



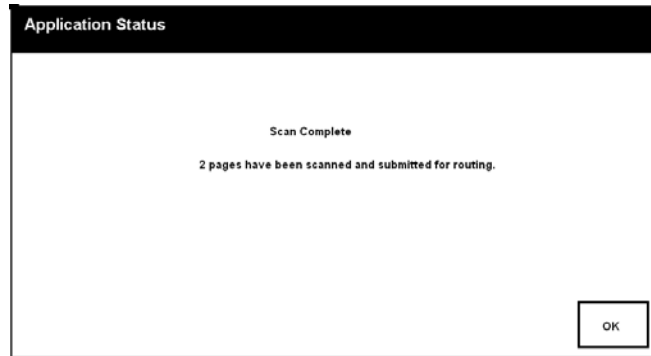
6 Load the document:

- **To use the automatic document feeder:** Load the document into the automatic document feeder.
- **To use the exposure glass:** Lift the cover, place an original on the exposure glass, close the cover.

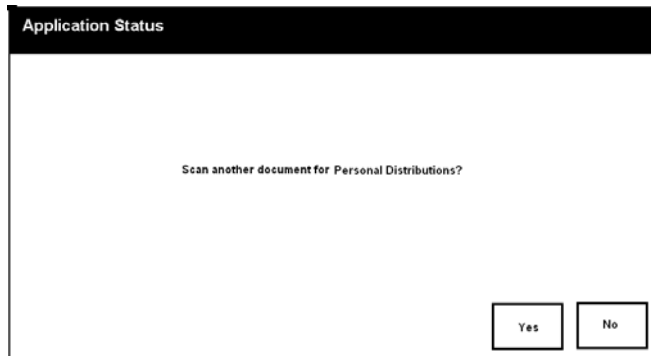
7 Press **START**.



The device scans the document and shows the following message.



- 8 Repeat the process to scan additional pages. When finished, press # on the keypad.
- 9 Press **OK**. The device shows the following message.

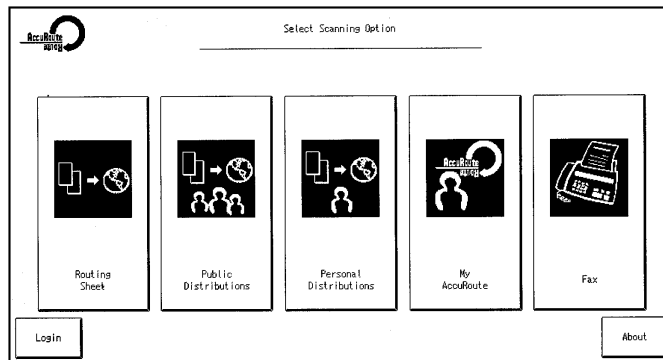



- 10 To scan another document, press **YES**, and go to step 5.
- 11 To go back to the main AccuRoute page, press **NO**.
- 12 Wait a few minutes and check the recipient address or destination to confirm delivery.  
If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to [Section 7: Troubleshooting](#).

# Testing the My AccuRoute feature

## To test the My AccuRoute feature:

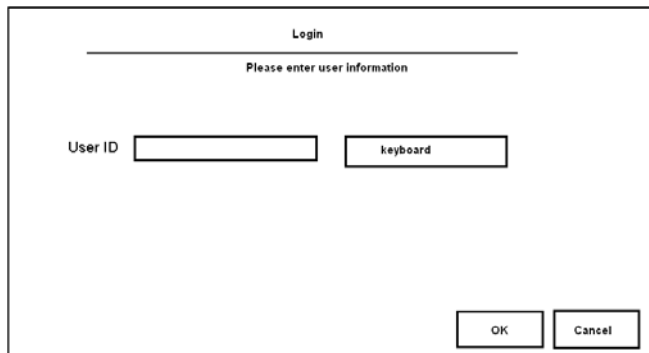
- 1 Verify that MyAccuRoute has been configured for your user account. For more information, consult the AccuRoute Desktop installation guide and AccuRoute Desktop user guide. Go to [Related documentation](#) on I-8.
- 2 Assemble a test document and go to the device. The main AccuRoute screen looks like this:



If the display panel does not show AccuRoute scanning features, press the function button that has the  icon. This will display the AccuRoute main menu.

- 3 Press **MY ACCURROUTE**. The device prompts you to log in.

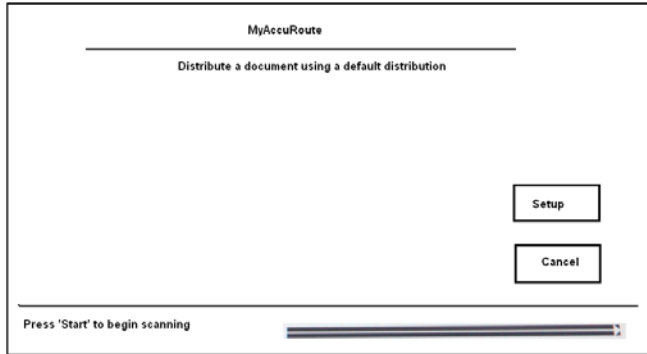
If you are configured to use Active Directory as your authentication option, you see the following page.



- 4 Log in with the account that is configured for My AccuRoute by following the steps below:
  - a Press **KEYBOARD**.
  - b Enter the user ID in the keyboard that opens.

c Press **OK**.

You see the summary page.



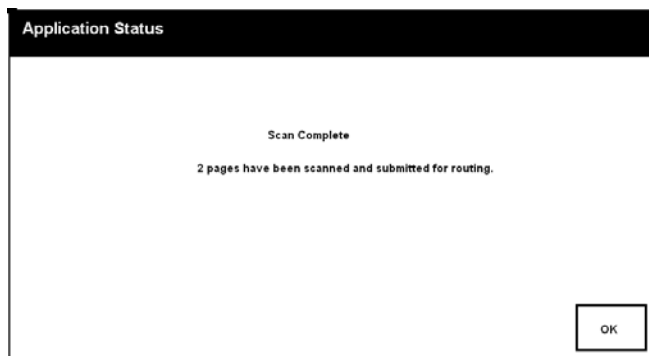
5 Load the document:

- o **To use the automatic document feeder:** Load the document into the automatic document feeder.
- o **To use the exposure glass:** Lift the cover, place an original on the exposure glass, close the cover.

6 Press **START**.



The device scans the document and shows the following message.



- 7 Repeat the process to scan additional pages. When finished, press **#** on the keypad.
- 8 Press **OK**. The device shows the following message.

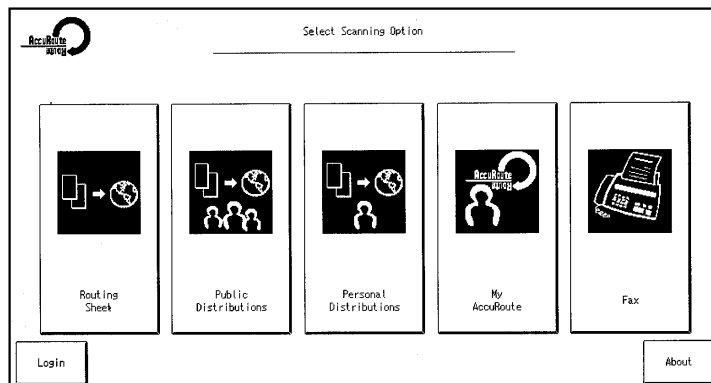



- 9 To scan another document, press **YES**, and go to step 5.
- 10 To go back to the main AccuRoute page, press **NO**.
- 11 Wait a few minutes and check the recipient address or destination to confirm delivery.  
If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to [Section 7: Troubleshooting](#).

## Testing the Fax feature

### To test the Fax feature:

- 1 Choose a working fax number for the test fax.
- 2 Assemble a test document and go to the device. The main AccuRoute screen looks like this:



If the display panel does not show AccuRoute scanning features, press the function button with the  icon. This will display the AccuRoute main menu.

- 3 Press **FAX**. The display panel shows options for the fax.

- 4 Enter the fax number.
- Press the **KEYBOARD** option beside the **FAX NUMBER** text box.
  - Use the keypad that opens to enter the fax number.
- 5 To include a cover page, press **YES** under **ADD COVER PAGE**.
- To enter the name of the sender, press the **KEYBOARD** option beside the **SENDER NAME** text box. Use the keypad that opens to enter the name.
  - To enter the name of the recipient, press the **KEYBOARD** option beside the **RECIPIENT NAME** text box. Use the keypad that opens to enter the name.
  - To enter a subject, press the **KEYBOARD** option beside the **SUBJECT** text box. Use the keypad that opens to enter the subject.

The Omtool Xlet uses the template “OmtoolCoverPage” when a cover page is requested. A template with this filename must exist on the Omtool server in ... \Omtool\OmtoolServer\Languages\XXX\Templates. For more information, consult the Administrator help. (Go to [Related documentation](#) on I-8.)

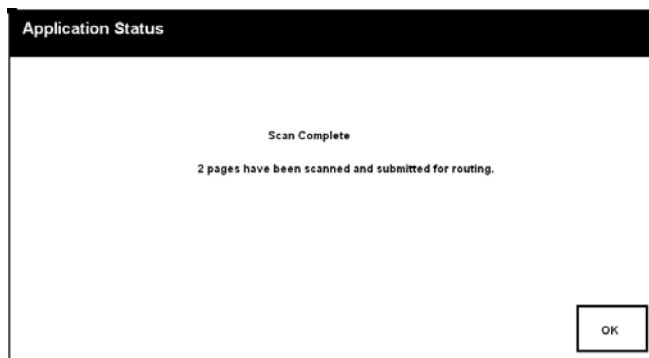
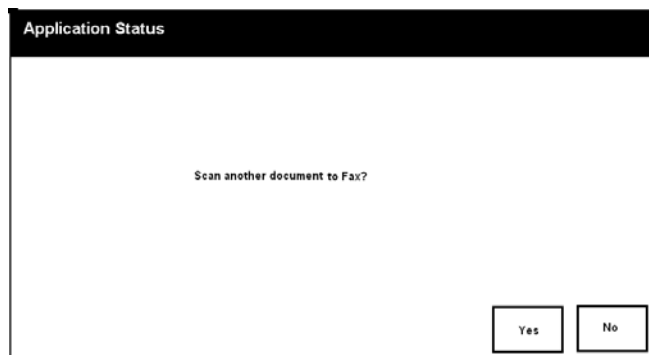
- 6 Press **OK**.

You see the summary page.

- 7 Load your document.
- **To use the automatic document feeder:** Load the document into the automatic document feeder.
  - **To use the exposure glass:** Lift the cover, place an original on the exposure glass, close the cover.

**8** Press **START**.

The device scans the document and shows the following message.

**9** Repeat the process to scan additional pages. When finished, press **#** on the keypad.**10** Press **OK**. The device shows the following message.**11** To scan another document, press **YES**, and go to step 4.**12** To go back to the main AccuRoute page, press **NO**.**13** Wait a few minutes and check the recipient address or destination to confirm delivery.

If the document does not arrive at the recipient address or destination, troubleshoot the setup. Go to [Section 7: Troubleshooting](#).





# Section 7: Troubleshooting

This section includes:

[Detecting workflow issues](#) (7-1)

[Troubleshooting the delivery mechanism](#) (7-2)

[Troubleshooting the message on the Omtool server](#) (7-2)

[Troubleshooting the multifunction device](#) (7-4)

[Troubleshooting merge failure when using remote AccuRoute Intelligent Device Client](#) (7-4)

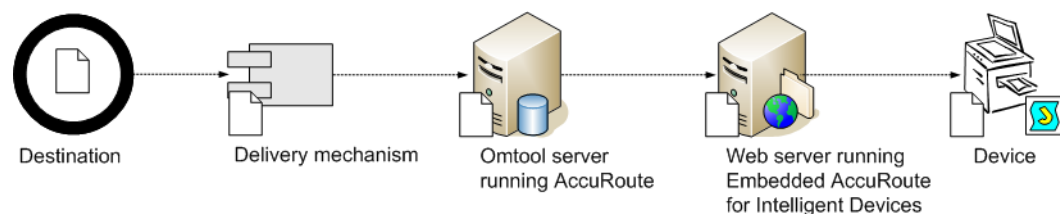
[Troubleshooting LDAP Authentication Failure](#) (7-5)

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

## Detecting workflow issues

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

**Figure 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 Omtool server, 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

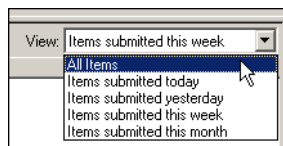
There are two important questions that can be resolved when troubleshooting a message on the Omtool server:

- 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.

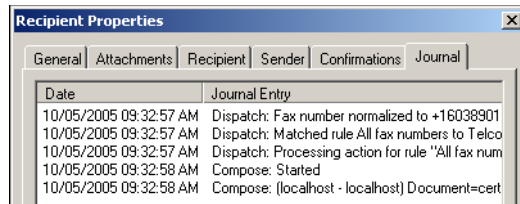
### To locate the message on the Omtool server:

- 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.

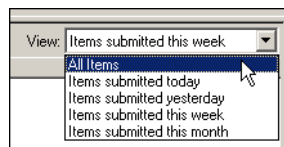


- **Message not found** - Go to step 4 and look for the message in the History queue.

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

**a** Click **HISTORY**.

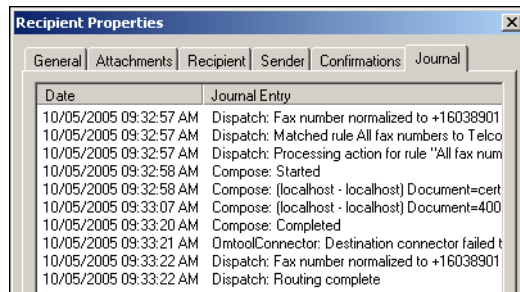
**b** View **ALL ITEMS**.



**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. (Go to [Omtool support and sales](#) on the inside front cover.)

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

- **Message not found** - Continue to [Troubleshooting the web server](#).

## Troubleshooting the web server

The Embedded AccuRoute for Intelligent Devices installation guide has instructions on troubleshooting the web server. (Go to [Related documentation](#) on I-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 using the information in the following table.

**Table 7-A: Common methods of troubleshooting the multifunction device**

Issue	Resolution
The Omtool Xlet is stopped.	Start the Omtool Xlet using the Application Manager.
The SD card is not in the device or a faulty connection exists between the SD card and the service slot. (This is a possible cause only when the Omtool Xlet is installed on an SD card.)	Verify that the SD card is inserted into a service slot on the device. (Do not remove the card while the device is running. Turn off the main power to the device, reinsert the SD card, turn on the main power, and wait for the device to boot.)
The device is not working properly for reasons unrelated to the Omtool Xlet.	Consult the documentation on the device for troubleshooting information.

## Troubleshooting merge failure when using remote AccuRoute Intelligent Device Client

**Problem** – Merge fails when using remote AccuRoute Intelligent Device Client.

**Reason** – This is happening because patch I2895 replaces the Datalogics files needed for file merge with ActivePDF files.

**Solution** - Resolve the issue by applying patch I4690. This will create the Datalogics files needed for file merge. For instructions, see [Applying patch I4690](#) (5-3)

# Troubleshooting LDAP Authentication Failure

**Problem** – LDAP Authentication fails with the error “Invalid Credentials” when using AccuRoute server v2.2.

**Reason** – This is happening because when you install AccuRoute Server 2.2, it does not register the Address Book Manager's IDirectoryLookup interface.

**Solution** – The workaround is to unregister and re-register the Address Book Manager.

## To unregister and re-register Address Book Manager:

- 1 Close the **Services** Applet.
- 2 Open a Command prompt and set the directory to **X:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\BIN**.
- 3 Run the following commands:
  - a `OmWebGFLookupU.exe /unregserver`
  - b `OmWebGFLookupU.exe -service`
- 4 Reopen the **Services** applet and open the properties page of the Omtool Address Book Manager.
- 5 Click the **LOG ON** tab and change the login credentials from the Local System Account to the appropriate account.

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**Note** When you register Address Book Manager, by default it creates a local logon account. You must change the local account to the appropriate logon account and start the service.

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- 6 Start the Address Book Service.

