
Omtool DMS Libraries Installation and Integration Guide for CA MDY FileSurf[®]

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Section I: Introduction

This guide contains instructions on deploying the CA MDY FileSurf® integration. It is written for systems administrators with detailed knowledge of the Omtool server and CA MDY FileSurf.

This section includes:

[Omtool DMS Libraries integration with CA MDY FileSurf](#) (I-1)

[Installation components](#) (I-1)

[Deployment summary](#) (I-2)

[Release notes](#) (I-2)

[Related AccuRoute 4.0 documentation](#) (I-2)

Omtool DMS Libraries integration with CA MDY FileSurf

Using the Omtool DMS Libraries for CA MDY FileSurf, you can be sure all of your important documents are profiled and stored in CA MDY FileSurf. The combined power of AccuRoute Desktop and CA MDY FileSurf allows your users to send both soft copy and hard copy documents to CA MDY FileSurf quickly and easily.

Best of all, there is no learning curve for your users—the CA MDY FileSurf integration uses CA MDY FileSurf's native windows and are totally familiar to your users.

CA MDY FileSurf identifies repositories as Database Aliases. Each Database Alias is an ODBC DSN identifying the CA MDY FileSurf server, credentials, database, and other settings. In order to be supported by the server, multiple Database Aliases must be correctly configured by CA MDY FileSurf on the server previous to their use.

When you profile a document, the native CA MDY FileSurf profiling dialog box appears. The CA MDY FileSurf user fills out the profile dialog box in accordance with their sites specifications. The information entered in here is stored for later use during the submission process. The document stub is removed after the user completes the native profile dialog box. The feature, called stubless profiling, is required by CA MDY FileSurf.

When the document is submitted for delivery, the Omtool server acquires the stored profile information, checks to see if the document already exists, adds a date and time stamp to the document name, and then submits the document to CA MDY FileSurf. CA MDY FileSurf always creates a new document by adding a date and time stamp.

Stored profiles are multiple use, in other words they can be used time and time again. When reusing a stored profile, however, you cannot overwrite or merge to an existing document.

For more information on profiling documents to CA MDY FileSurf, go to [Section 7: Testing](#) (7-1)

Installation components

Omtool DMS Libraries v4.0 is included in the AccuRoute v4.0 installation.

Deployment summary

To deploy the DMS Libraries v4.0 for CA MDY FileSurf:

- 1 Complete the installation requirements. (Go to [Section 3: Installation](#).)
 - 2 Complete required server configuration. (Go to [Section 4: Required server configuration](#).)
 - 3 Complete any optional server configuration. (Go to [Section 5: Optional server configuration](#).)
 - 4 Complete the client configuration. (Go to [Section 6: Client Configuration](#).)
 - 5 Test profiling a document into CA MDY FileSurf. (Go to [Section 7: Testing](#).)
 - 6 Troubleshoot the installation. (Go to [Section 8: Troubleshooting](#).)
-

Release notes

Enhancements

Omtool DMS Libraries v4.0 for CA MDY FileSurf has been qualified with AccuRoute Desktop v4.0.

Resolutions

There are no known resolutions.

Limitations

There are no known limitations.

Related AccuRoute 4.0 documentation

For more information about AccuRoute Desktop and other AccuRoute products, refer to the [AccuRoute v4.0 documentation home page](#) to access:

- Readmes and release notes
- DMS Libraries quick start guides
- User guides and online help
- Administrator guides
- Installation and upgrade guides

Section 2: Requirements

This section includes:

[Server requirements](#) (2-1)

[Entering a license for MDY Filesurf](#) (2-1)

[Client requirements](#) (2-5)

[Supported MDY FileSurf versions](#) (2-5)

Server requirements

The system where you install the DMS connector for MDY FileSurf must meet the following minimum requirements:

- AccuRoute v4.0
- DMS connector license

Note The DMS connector license must be added to the server prior to adding the connector. The AccuRoute server makes one connector available by default. Check the licensing properties on your server for connector availability.

For more information about license activation, continue to [Entering a license for MDY Filesurf](#) (2-1).

Entering a license for MDY Filesurf

Note MDY FileSurf requires a license. For more information, contact Omtool Sales.

You can activate the MDY FileSurf license in one of two ways:

- Automatically when you enter an activation code and the AccuRoute server is on a system that has access to the internet.
- Manually if the AccuRoute server does not have access to the internet. In this case, you will:
 - ▶ Submit and validate the activation code.
 - ▶ Create an Export file into which the activation code is copied.
 - ▶ Create an Import file and use this file for activation from a system that does have internet access.

Automatic license activation

Be sure the AccuRoute server has access to the internet. Have available a copy of the activation code.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 Expand the tree view and select the server name.
- 3 Right-click and select the **Licensing** option. The **Licensing** page is displayed.
- 4 Click the **Activate License...** button. The **License Activation** page is displayed.
- 5 Select the **Automatically activate via the Internet** option.
- 6 Enter your license activation code in the **Activation Code** text field.
- 7 Click **OK**. The server is updated with your license.
- 8 Click **Close** to complete the procedure.

Manual license activation

Have available a copy of the activation code.

Note Although the AccuRoute server may not have access to the internet, to complete this procedure you will need a system that does have access.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 Expand the tree view and select the server name.
- 3 Right-click and select the **Licensing** option. The **Licensing** page is displayed.
- 4 Click the **Activate License...** button. The **License Activation** page is displayed.
- 5 Select the **Export activation file for manual activation** option.
- 6 Create an Export license file:
 - a Browse to a location where you want to save the license file. By default, the file is an Export file named **ManualActivation.exp**. After specifying the file name and location, click **Save**.
 - b The path will appear in the **Export Filename** field on the **License Activation** page. Click **OK**.
- 7 From a system with internet access, launch the web browser and go to:
<https://license.omtool.com/accuroute>

The **Manual Licensing Portal** page opens.



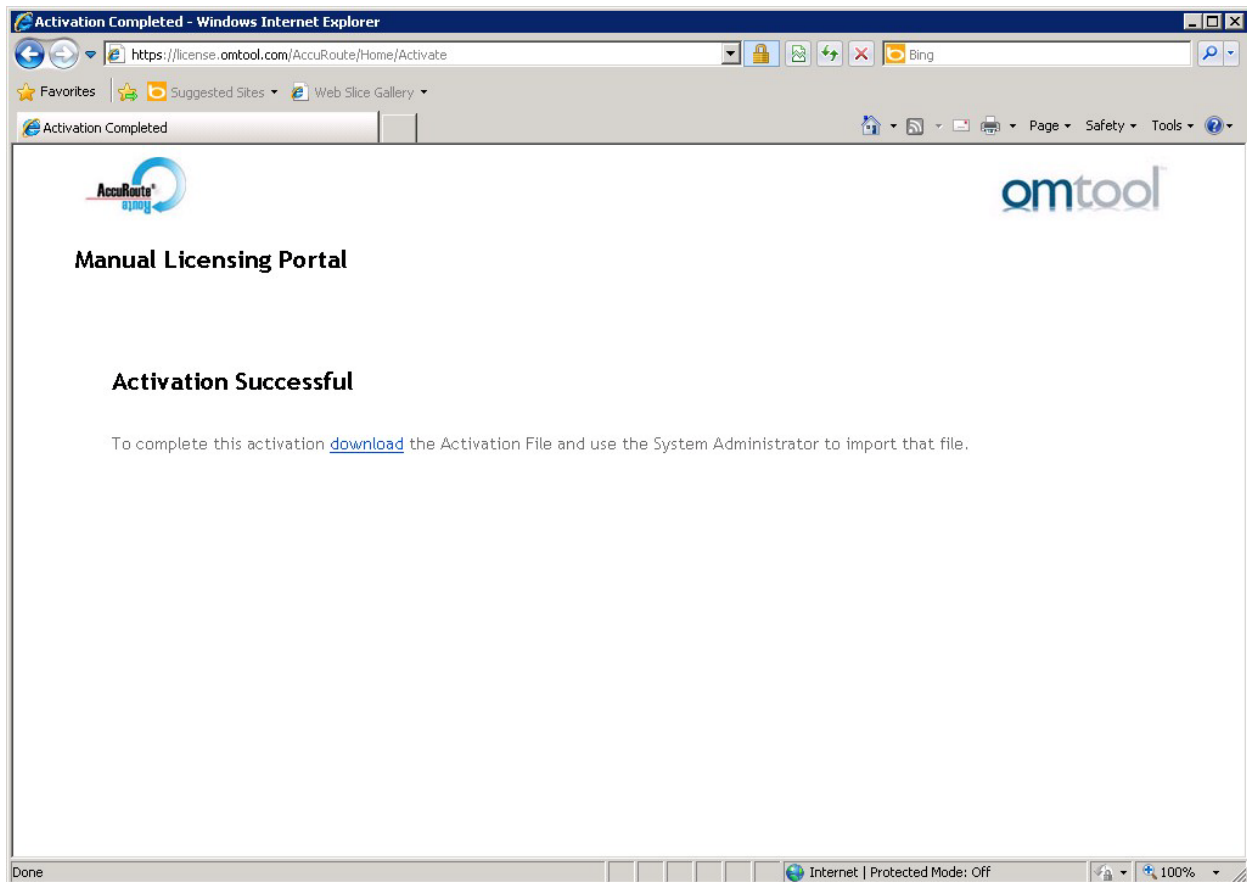
Manual Licensing Portal

Enter your activation code and select the Exported Activation File made using the Server Administrator.

Activation Code:	<input type="text"/>
	<input checked="" type="radio"/> Activate License <input type="radio"/> Deactitvate License
Exported Activation File:	<input type="text"/> <input type="button" value="Browse..."/>
<input type="button" value="NEXT >"/>	

- 8 Enter your license activation code in the **Activation Code** text field.
- 9 Be sure the **Activate License** option is selected (the default).
- 10 Click the **Browse** button to select the [ManualActivation.exp](#) file created in Step 6. With the file name selected (highlighted), click **Open**.
- 11 Verify that the license information is entered correctly on the **Manual Licensing Portal** page.

12 Click **NEXT** and the **Activation Successful** message is displayed.



13 To complete the activation, click **Download**. The **File Download** page is displayed.

14 Click **Save** to create the Import file. By default, the file is named with the activation code. You can change this (for example, [ManualActivation.imp](#)) and select a location for the file on the AccuRoute server.

15 Click **Save**. The **Download Complete** page shows that status of the file download.

16 Click **Close**.

Note You can minimize or close the browser.

17 On the **Licensing** page, click the **Activate License...** button.

18 Select the **Import activation file from manual activation** option.

19 Browse to the saved [ManualActivation.imp](#) file. Select the file and click **Open**.

20 Click **OK** on the **License Activation** page. The license is updated.

21 Click **Close** to complete the procedure.

Client requirements

The system where you install the Omtool DMS Libraries v4.0 for MDY FileSurf update must meet the following minimum requirements:

- AccuRoute Desktop v4.0
- The MDY FileSurf client software must be installed, configured, and functional on all client workstations
- MDYFSdata.dll version 7.5.4.2
- FaxCenter v3.4

Supported MDY FileSurf versions

- MDY FileSurf v7.5

Section 2: Requirements

Section 3: Installation

This section includes:

[Downloading DMS Libraries for MDY FileSurf](#) (3-1)

[Adding the MDY FileSurf connector](#) (3-1)

[All Omtool applications on the same system share the Omtool DMS Libraries configuration](#) (3-2)

Downloading DMS Libraries for MDY FileSurf

Download the DMS Libraries v4.0 for MDY FileSurf from the Omtool web server. (Go to <http://www.omtool.com/support> and log in using your customer number. Locate the module in the **Downloads & Docs** section, download it, and save it to a local drive.)

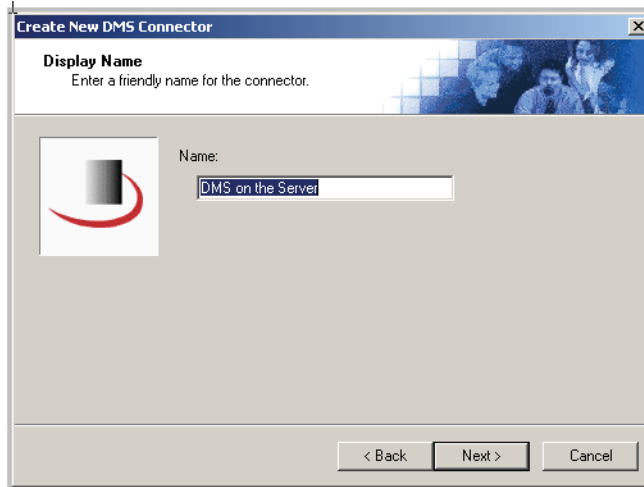
Adding the MDY FileSurf connector

Note The Export Profile Information and Create Default Profile Information buttons are not applicable for the MDY Filesurf DMS connector at this time.

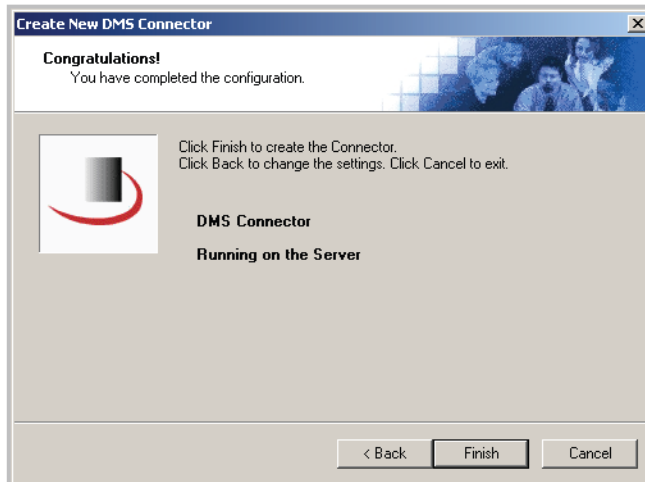
To add the MDY FileSurf connector to the AccuRoute server:

- 1 Right-click **Connectors** in the console tree and select **New AccuRoute Server connector for > MDY Filesurf**. The **Server Address** page appears.
- 2 Select the server address to which you want this connector installed. Choose **Run on the Message Server** or **Remote Server**. If you selected **Remote Server**, enter the name of the server.
- 3 Click **Next**. The **Display Name** page appears.

- 4 **DMS on the Server** appears as the default name. Type a friendly name for this connector in the **Name** text box and click **Next**.



- 5 The **Congratulations** page appears. Click **Finish**.



- 6 Open the MDY FileSurf connector's **Properties**, click the **Advanced** tab, and click **Configure**. The following message appears: "FileSurf has been configured properly." No further configuration is required on the AccuRoute server except for MDY FileSurf-specific Database Alias configuration.

All Omtool applications on the same system share the Omtool DMS Libraries configuration

When multiple Omtool applications are installed on the same system, these applications share the same DMS configuration data. If you make changes to the DMS configuration settings for one Omtool application, those changes affect all Omtool applications installed on the system.

Section 4: Required server configuration

This section includes:

[Enabling MDY FileSurf as a recipient type in AccuRoute Desktop](#) (4-1)

Enabling MDY FileSurf as a recipient type in AccuRoute Desktop

If you have added support for MDY FileSurf and you want to make it available to users as a recipient type in AccuRoute Desktop, you must modify the AccuRoute properties of registered users.

If any individual users are registered on the AccuRoute server, complete this procedure once to modify user defaults and once for each individual user.

To enable MDY FileSurf as a recipient type in AccuRoute Desktop:

- 1 Click **Registered Users** in the console tree and double-click an individual user in the details pane, or right-click **Registered Users** in the console tree and select **User Defaults**.
- 2 Click the **AccuRoute** tab.
- 3 Select **Enable Use of the AccuRoute Client**.
- 4 Locate **Allow User to Route to List** and select **MDY FileSurf**.
- 5 Click **OK** to save your changes.

Now when you start AccuRoute Desktop, MDY FileSurf is available.

Note Changes made to **Registered Users > User Defaults** do not affect any individual registered user. Changes made here affect only those users who do not have an individual record in the Registered Users database.

Section 4: Required server configuration

Section 5: Optional server configuration

This section includes:

[Changing the label of a document](#) (5-1)

[Configuring document link](#) (5-2)

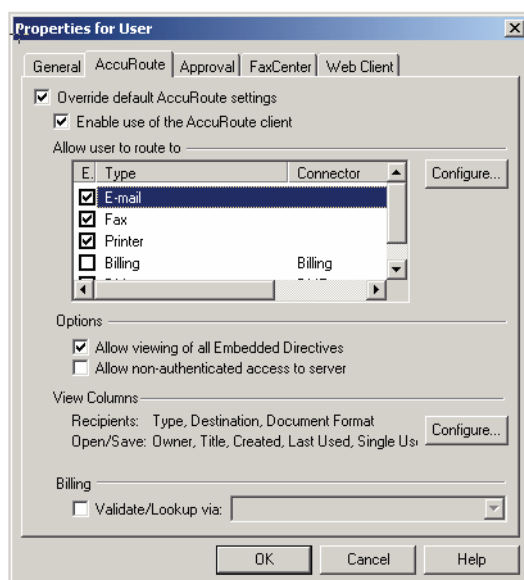
Changing the label of a document

Changing the label of a document type allows you to specify the name that appears to your users. For example, you might want TIFF (Image) to read Fax Format. You can change these labels in the Omtool Administrator under Registered Users.

Tip If any individual users are registered on the AccuRoute server, complete this procedure once to modify user defaults and once for each individual user.

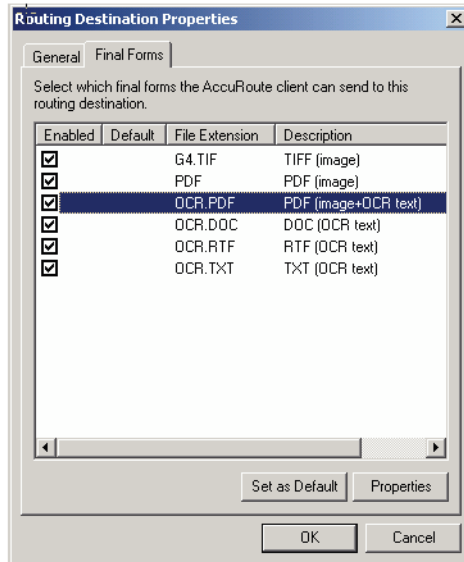
To change the label of a document type:

- 1 Click **Registered Users** in the console tree and double-click an individual user in the details pane, or right-click **Registered Users** in the console tree and select **User Defaults**.
- 2 Click the **AccuRoute** tab.
- 3 Highlight an item in the **Allow User to Route to** list.

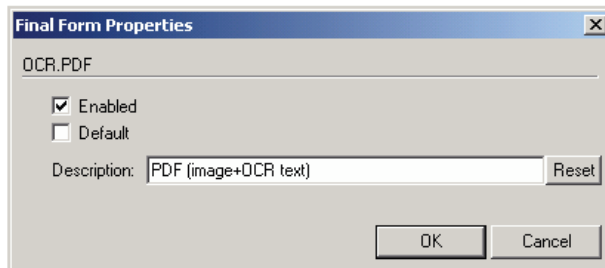


- 4 Click **Configure** and click the **Final Forms** tab.

- 5 Highlight the document type that needs to be modified.



- 6 Click **Properties**.
- 7 Enter the new label for this document type in the **Description** field.



- 8 Click **OK** to close all the open dialogs.
- 9 Repeat the above steps for any other document type for which you want to change the label.

Configuring document link

This section includes:

[Installing the Omtool Web Client](#) (5-3)

[Defining an outbound rule](#) (5-3)

[Customizing the notification template](#) (5-3)

Omtool provides you with the ability to generate a confirmation e-mail that includes an active link to the document stored in MDY Filesurf. Clicking the http link opens the document that was stored in MDY Filesurf as instructed by the AccuRoute Routing Sheet.

Generating a confirmation e-mail that includes an active link requires the following components:

- AccuRoute server v4.0
- AccuRoute Desktop v4.0
- Internet Information Service (IIS)
- Omtool Web Client

Note When creating a Routing Sheet, you must configure the message Options to include an E-mail notification.

Installing the Omtool Web Client

If you are not already using the Omtool Web Client, you will need to install it before you can generate confirmation e-mails that include an active link.

For detailed instructions for deploying the Omtool Web Client, consult the Omtool Web Client Implementation Guide available on the [AccuRoute v4.0 documentation home page](#).

Defining an outbound rule

Generating a confirmation e-mail that contains a document link utilizes the AccuRoute SMTP connector. In order to use this feature, make sure one of the following rules is defined in your list of Outbound Rules:

- If Destination is an e-mail address is * then Route to SMTP on the server
- All e-mail to SMTP on the Server - Created by Connector Wizard

Note If one of the above rules doesn't exist, you need to create one of them. See the Administrator help for information on creating rules, available on the [AccuRoute v4.0 documentation home page](#).

Customizing the notification template

In order to build the notification message, you need to customize the AccuRoute notification template.

Note The document link only works for the originator of the message. When multiple recipients are selected for the notification, the other recipients will see the following message when attempting to view the document:

```
Invalid JobID specified  
The fax may have been deleted, or you may not be authorized to view that  
fax.  
[UserEmail = 'administrator@stress.omtool.com'  
FaxOwner= 'jdm@documentation.omtool.com']
```

To customize the AccuRoute template:

- I Use WordPad to open the following file:

```
...\Omtool\OmtoolServer\Languages\ENU\Templates\OMNotification-  
Success.OMTPL
```

- 2 Add the following line to this file. You can add the line anywhere.
`http://Your AccuRoute server name/Your Virtual Directory name/
LaunchDMS.asp?jobID=%JOB_ID%`
- 3 Replace `Your AccuRoute server name` with the actual name of your AccuRoute server.
- 4 Save and close the template notification file.

The following example shows a sample of the template notification file configured to generate a confirmation e-mail containing a document link:

```
The message you sent to %RECIP_NAME% at %DESTINATION%, was delivered  
successfully on ATE_DELIVERED% at%TIME_DELIVERED%
```

```
JobID: %JOB_ID%
```

```
Open the Document: http://Your AccuRoute server name/Your Virtual Directory  
name/LaunchDMS.asp?jobID=%JOB_ID%
```

```
FaxID: %FAX_PAGE1%
```

Section 6: Client Configuration

This section includes:

[Configuring AccuRoute Desktop](#) (6-1)

[Configuring FaxCenter](#) (6-1)

[Configuring Swiftwriter](#) (6-2)

[Client deployment methods](#) (6-2)

Configuring AccuRoute Desktop

To add MDY FileSurf functionality to AccuRoute Desktop:

- 1 Start AccuRoute Desktop and log in.
- 2 Click **Tools** on the menu bar and select **Configure DMS**.
- 3 Select **FileSurf** from the menu that appears

No data entry is required. This step updates the Omtool DMS database and displays the following message: "FileSurf has been configured properly."

Continue to [Configuring FaxCenter](#).

Configuring FaxCenter

To add DM functionality to FaxCenter:

- 1 Start FaxCenter and log in.
- 2 Click **Tools** on the menu bar and select **Configure DMS**. The **Document Management Configuration** screen appears.
- 3 Select **DM** and click **Configure**. The **Hummingbird DM Login Configuration** screen appears.
- 4 At this point, the configuration is identical to that of the connector configuration.
- 5 Click **OK**.

Configuring Swiftwriter

To add DM functionality to Swiftwriter:

- 1 Start the Swiftwriter Configuration application in the Control Panel. The **Swiftwriter Configuration** screen appears.
- 2 Click **DM** in the list so that the option text is highlighted and click **Properties**. The **Hummingbird DM Login Configuration** screen appears.
- 3 At this point, the configuration is identical to that of the connector configuration.
- 4 Select **DM**, click **Apply**, and then click **OK**.

Client deployment methods

There are two methods available for deploying clients to individual workstations with MDY FileSurf functionality:

- Configure AccuRoute Desktop or FaxCenter to support MDY FileSurf on one client workstation. Then copy the Omtool DMS Libraries configuration file to the Omtool DMS Libraries setup directory where it can be propagated to client workstations during installation. Continue to [Configuring MDY FileSurf for client rollout](#).
- Install either AccuRoute Desktop or FaxCenter on each individual workstation and perform the configuration steps for MDY FileSurf manually. Continue to [Configuring MDY FileSurf manually](#).

Configuring MDY FileSurf for client rollout

This procedure is optional. If you do not complete this procedure before deploying the Omtool DMS Libraries, you (or the user) must configure the Omtool DMS Libraries to support MDY FileSurf manually after you install AccuRoute Desktop or FaxCenter.

To pre-configure the Omtool DMS Libraries for deployment:

- 1 Install AccuRoute Desktop v4.0 or FaxCenter on a workstation.
- 2 Configure the Omtool DMS Libraries to support MDY FileSurf. Select the settings that should apply to all workstations in your environment.
- 3 Go to the `c:\Program Files\Common Files\Omtool` directory on the workstation where AccuRoute Desktop or FaxCenter is installed, and copy the `OmDMSDB.xml` file to the clipboard.
- 4 Go to the AccuRoute server where AccuRoute Desktop or FaxCenter setup files are located, and paste the file to the following locations. When prompted to replace the existing file, click **Yes**.

```
...\OmtoolServer\Clients\AccuRouteDesktop\Common\Omtool
```

```
...\OmtoolServer\Clients\FaxCenter\Common\Omtool
```

You have pre-configured the Omtool DMS Libraries setup with the configuration data for MDY FileSurf. When you are ready to deploy MDY FileSurf, launch `setup.exe` in the AccuRoute Desktop or FaxCenter directory.

Configuring MDY FileSurf manually

To configure MDY FileSurf manually:

- **AccuRoute Desktop** - (Go to [Configuring AccuRoute Desktop](#) on 6-1.) Follow these steps on all AccuRoute Desktop workstations.
- **FaxCenter** - [Configuring FaxCenter](#) (6-1)

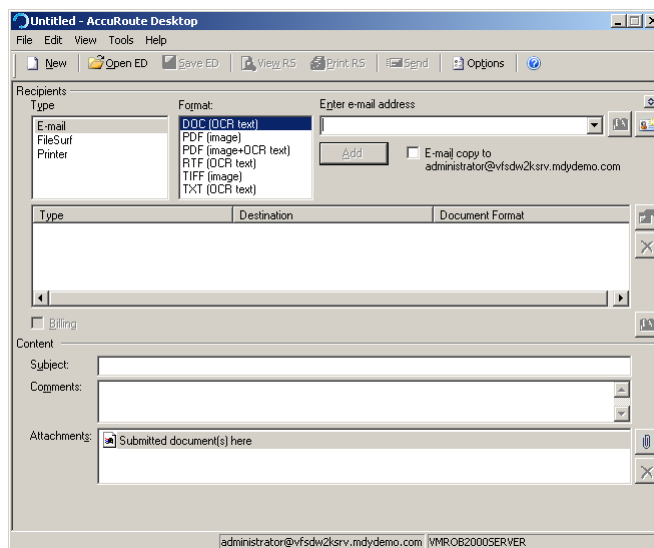
Section 7: Testing

Testing installation and configuration

To test the installation and configuration of Omtool DMS Libraries v4.0 for MDY FileSurf, send a message using AccuRoute Desktop. For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to [Related AccuRoute 4.0 documentation](#) on 1-2.

To send a message to MDY FileSurf using AccuRoute Desktop:

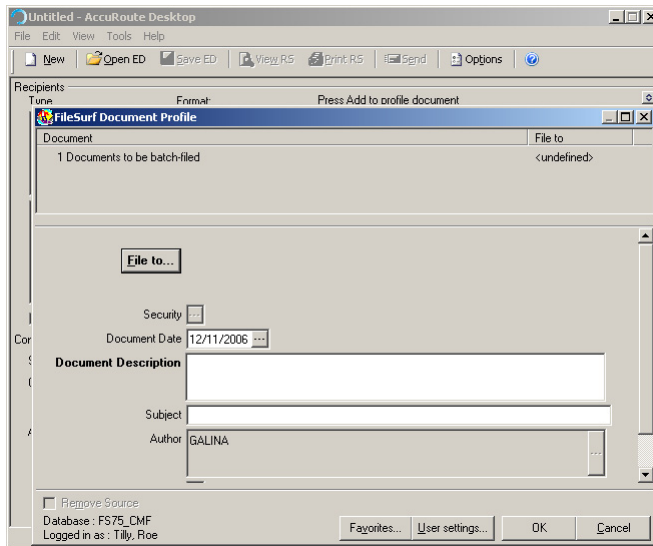
- 1 Start AccuRoute Desktop. Click **Start**, go to the Omtool programs group, and select **AccuRoute Desktop**. Log in if prompted. The application appears on your desktop.



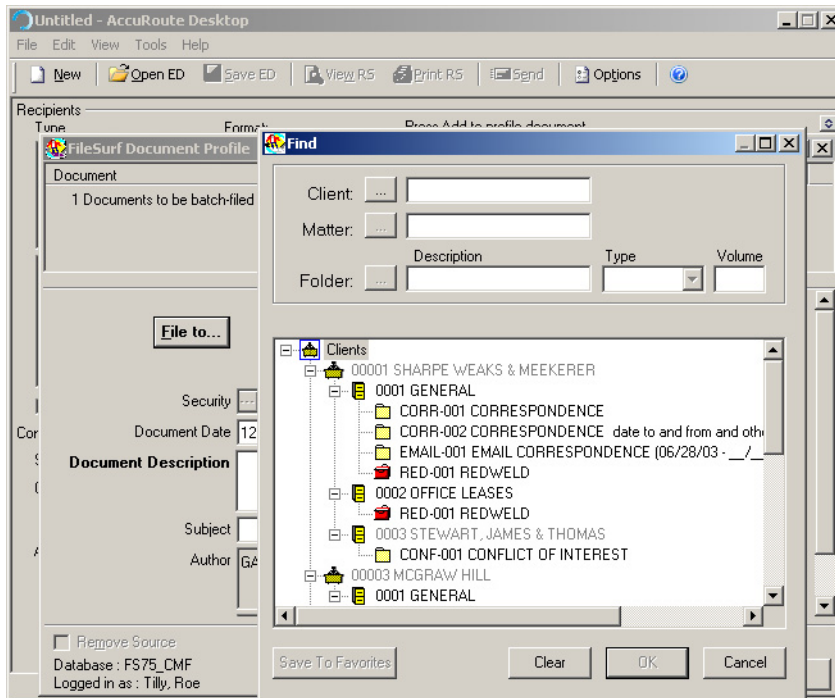
- 2 Select the destination type **FileSurf** in the **Recipients Type** list and select a file format for your message in the **Format** list.

For more information on the available file formats, consult the AccuRoute Desktop User Guide.

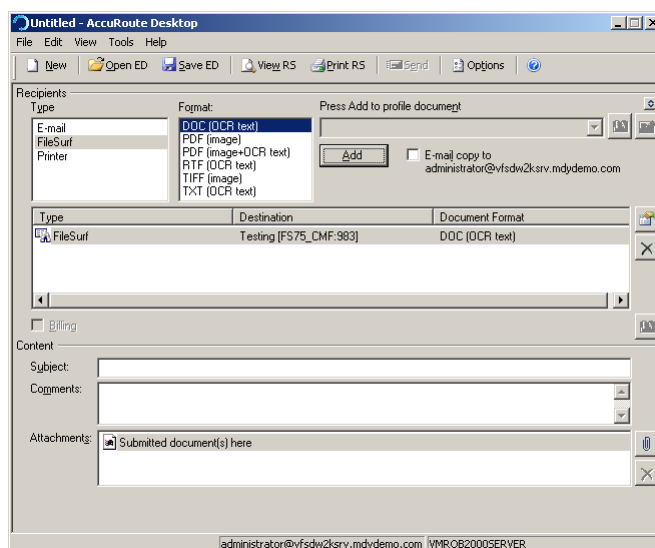
3 Click **Add**.



4 Click **File to**.



- 5 Enter desired information and click **OK**. A FileSurf recipient type is added to the message.



- 6 Add content to your message.
- Locate the **Content** section at the bottom and type a subject and comments.
 - Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:

File - Select this option to attach a file saved from your computer or network share. Browse to the file, select it, and click **Open**. The file appears in the attachments list.

Web document - Select this option to attach a web page from the Internet. Type the address of the web document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML), and click **OK**.

- 7 Do any of the following:

Send the message immediately - Click **Send** on the toolbar. A message box indicates that your message has been sent to the server. (Your message must have at least one attachment.)

Save the message as an Embedded Directive - Click **Save ED** on the toolbar, type a title for the Embedded Directive, and click **Save**.

Print a Routing Sheet that can be scanned with hard copy documents - Save the message as an Embedded Directive. Then click **Print ED** on the toolbar. AccuRoute Desktop creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your network administrator. (Your message can include both electronic and hard copy documents.)

Section 8: Troubleshooting

This section includes:

[Detecting workflow issues](#)

[Troubleshooting the delivery mechanism](#) (8-1)

[Troubleshooting the message on the Omtool server](#) (8-1)

[Troubleshooting the multifunction device](#) (8-3)

[Troubleshooting the client](#) (8-4)

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 profiled to MDY FileSurf, 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.

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 MDY FileSurf, and then continues to the Omtool server, the device (if applicable), and then the client.

Continue to [Troubleshooting the delivery mechanism](#).

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 to MDY FileSurf. Do some basic troubleshooting on MDY FileSurf. If MDY FileSurf is functioning correctly, troubleshoot the message on the Omtool server.

For information on troubleshooting MDY FileSurf, consult MDY FileSurf's documentation.

Continue to [Troubleshooting the message on the Omtool server](#).

Troubleshooting the message on the Omtool server

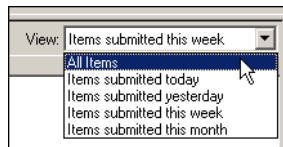
There are two important questions that can be resolved when troubleshooting a message on the Omtool server:

- 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:

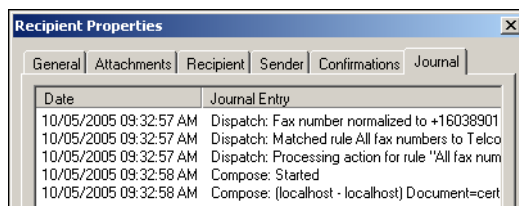
- 1 Start the Administrator.
- 2 Go to **Omtool Server Administrator > [ServerName] > Messages**.
- 3 Look for the message in the In Process queue:
 - a Click **In Process**.
 - b View **All Items**.



- c Sort all items by the date submitted.
 - d Look for the message.
- **Message found** - Double-click the message and then click the **Journal** tab to 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.

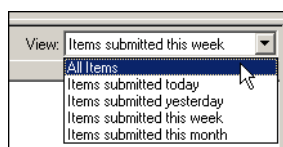
Note If you open the Journal while the message is still processing, you need to close the Journal properties before the Journal will update.

Also, check the Event Viewer for any information that might help troubleshoot the issue.

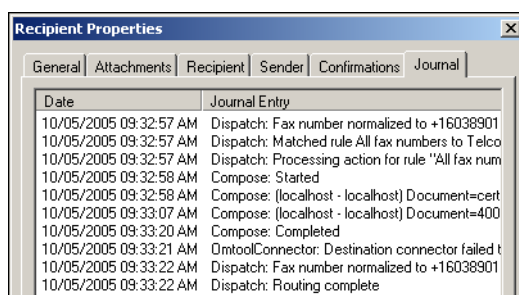


- **Message not found** - Go to step 4 and look for the message in the History queue.

- 4 Look for the message in the History queue:
 - a Click **History**. The message could be in either the Successful barometer or the General Failure barometer.
 - b View **All Items**.



- c Sort all items by the date submitted.
 - d Look for the message.
- **Message found** - Double-click the message and then click the **Journal** tab to 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 MDY FileSurf successfully. Do some advanced troubleshooting on MDY FileSurf 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.)

Also, check the Event Viewer for any information that might help troubleshoot the issue.

- **Message not found** - If the message is not found, the next step is to troubleshoot the multifunction device.

Continue to [Troubleshooting the multifunction device](#).

Troubleshooting the multifunction device

After troubleshooting all other components in the workflow, troubleshoot the device. Consult the device manufacturer's documentation.

Continue to [Troubleshooting the client](#).

Troubleshooting the client

If the device is working properly, try sending a message from the client to a recipient other than MDY FileSurf. If you are able to send messages to recipients other than MDY FileSurf and MDY FileSurf is operating correctly, contact Omtool. (Go to [Omtool support and sales](#) on the inside front cover.)