AccuRoute Connector for ProLaw® Installation and Integration Guide

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Section 1: Overview

Features

The ProLaw DMS Connector is configured on the server (there is no ProLaw client to install in order to configure the connector).

When the message is submitted through the AccuRoute server for processing, the meta-data that was collected during the IIC actions is inserted into the appropriate fields in the imported document in the ProLaw database.

Requirements

Server 1

- AccuRoute v4.0 with AccuRoute Extensions for ProLaw
- Tier 2 DMS connector license

Server2

- The ProLaw server is the SQL server 2005 or later

Client 1

- Windows 7, 32-bit or 64-bit
- .NET framework version 2 or newer installed before you install the ProLaw client
- AccuRoute Extensions for ProLaw client, as found in the **clients** directory:

  `\\accuroute_server_name\Omtool\clients\ExtensionsForProLaw`

> **Note** AccuRoute Extensions for ProLaw requires an internet connection. After 30 days, an error will occur without this connection.

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Section 2: Installation

Installation involves three procedures, as described in this section:

Creating a ProLaw DMS connector (2-1)

Creating properties (2-2)

Creating a ProLaw DMS connector

1. Click **Start > All Programs > Omtool > Omtool Server Administrator**.
2. Right-click on **Connectors** and select **New AccuRoute connector for > ProLaw**. The **Server Address** page opens.
3. Select the Server Address option:
   - **Run on the Message Server**
   - **Remote Server** and enter the server address in the text box.
4. Click **Next**. The **Display Name** page opens.
5. In the **Name** text box, enter a friendly name for the connector.
6. Click **Next**. A message indicates that the connector is running on the server.
7. Click **Next**. Additional DMS configuration options are displayed.
8. Enter a **Connection String** in the format:

   ```
   Server=ProlawServer\ProLawDatabase;database=ProLawDatabaseName:
   Trusted_Connection=yes:User ID='domain\username';Password='password'
   ```

   For example:

   ```
   Server=Srv100\ProLaw;database=ProLaw:Trusted_Connection=yes:User
   ID='Production\ProAdmin;Password='Pr0Adm1n'
   ```

9. Click **Test** to test the connection string to the ProLaw database.
10. After a successful connection message, click **Finish** to complete the configuration.

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Creating properties

You will need to create the following properties:

- DMSMatterID
- DMSDocDescription
- DMSDocTypeID
- DMSDocClassID
- DMSDocAuthor

The example used in the following procedure creates the required property **DMSMatterID**.

1. Open the AccuRoute server console.
2. Click **Configuration**.
3. Right-click on **Properties** and select **New > Property Dictionary**.
4. On the **General** tab, add the following:
   - Name: **DMSMatterID**
   - Label: **DMSMatterID**
   - Instructions: **DMSMatterID**
   - Type: **Text**
   - Mappings: Select **OPath** mapping and enter: `\\prDestinationData\prDMSDocMatterID`
5. Click **OK** to complete creation of the property.

Complete the steps above for the DMSDocDescription, DMSDocTypeID, DMSDocClassID, and DMSDocAuthor properties. Refer to the table of guidelines below.

Table 2-1: **Guidelines for configuring properties**

Property	Type	OPath Mapping
DMSMatterID	Text	`\\prDestinationData\prDMSDocMatterID`
DMSDocDescription	Text	`\\prDestinationData\prDMSDocDescription`
DMSDocTypeID	Text	`\\prDestinationData\prDMSDocTypeID`
DMSDocClassID	Text	`\\prDestinationData\prDMSDocClassID`
DMSDocAuthor	Text	`\\prDestinationData\prDMSDocAuthor`

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Section 3: Configuration

This section includes a procedure for:

Adding the ProLaw recipient type to Group Permissions (3-1)

Adding the ProLaw recipient type to Group Permissions

1. Click **Start > All Programs > Omtool > Omtool Server Administrator**.
2. Click **Configuration > Groups**.
3. Select [double-click?] the group that will access the ProLaw workflow. Click the **AccuRoute** tab. [???]
4. Select the **Enable members of this group as AccuRoute users** option.
5. In the **Allow group to route to** section, select **ProLaw**.
6. Click **OK**.

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