
Omtool DMS Libraries v2.3 installation and integration guide for Accutrac® XE™

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Section I: Introduction

This guide contains instructions on deploying Omtool DMS Libraries v2.3 for Accutrac XE. It is written for systems administrators with detailed knowledge of the Omtool server and Accutrac XE.

This section includes:

[Omtool DMS Libraries integration with Accutrac XE](#) (I-1)

[Installation components](#) (I-2)

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

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

[Related documentation](#) (I-3)

Omtool DMS Libraries integration with Accutrac XE

Omtool DMS Libraries v2.3 includes the ability to integrate with Accutrac XE.

Using Omtool DMS Libraries v2.3, you can be sure all of your important documents are stored in Accutrac XE. The combined power of AccuRoute Desktop v2.2 or higher and Omtool DMS Libraries v2.3 for Accutrac XE allows your users to send both soft copy and hard copy documents to Accutrac XE quickly and easily.

Best of all, there is no learning curve for your users—Omtool DMS Libraries v2.3 for Accutrac XE uses Accutrac XE's native windows and are totally familiar to your users.

For more information on profiling documents to Accutrac XE, go to [Section 7: Testing](#).

Installation components

Omtool DMS Libraries v2.3 is included in the AccuRoute v2.3 installation. If you have AccuRoute v2.1, you must apply AccuRoute Desktop v2.2 Update to the Omtool server.

Note The instructions in this guide are applicable only if you are running Omtool DMS Libraries v2.3.

Deployment summary

To deploy Omtool DMS Libraries v2.3 for Accutrac XE:

- 1 Complete the installation requirements. (Go to [Section 3: Installation](#).)
- 2 Complete the 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 Accutrac XE. (Go to [Section 7: Testing](#).)
- 6 Troubleshoot the installation. (Go to [Section 8: Troubleshooting](#).)

Release notes

Enhancements

Omtool DMS Libraries v2.3 for Accutrac XE includes the following enhancements:

Omtool DMS Libraries v2.3 for Accutrac XE has been qualified with AccuRoute Desktop v2.2 or higher

Resolutions

Omtool DMS Libraries v2.3 for Accutrac XE includes the following resolved issues:

- AccuRoute Desktop was not deleting temporary files called “stub documents” from some DMS applications. This issue impacted DMS applications that do not require AccuRoute Desktop to create a stub document before routing the document to the DMS application. See Knowledge Base Article K03805 (Go to [Online resources](#) on the inside front cover.)
- Updated Omtool DMS Library files were not included in the AccuRoute Desktop installation directory. As a result, files had to be manually installed on every workstation.

Limitations

Omtool DMS Libraries v2.3 for Accutrac XE includes no known limitations.

Related documentation

- AccuRoute Desktop installation guide - <http://www.omtool.com/documentation/AccuRoute/v22/AccuRouteDesktop/AccuRouteDesktopV22InstallGuide.pdf>
- AccuRoute Desktop users guide - <http://www.omtool.com/documentation/AccuRoute/v22/AccuRouteDesktop/AccuRouteDesktopV22UserGuide.pdf>
- Sending a message to Accutrac XE using AccuRoute Desktop - <http://www.omtool.com/documentation/dmslibraries/v23/AccutracXE/OmtoolDMSLibrariesV23AccutracXEQuickStartGuide.pdf>
- Administrator help - <http://www.omtool.com/documentation/omttoolserver/v36/admin/index.htm>

Section 2: Requirements

This section includes:

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

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

[Supported Accutrac XE versions](#) (2-2)

Server requirements

The system where you install the DMS connector for Accutrac XE must meet the following minimum requirements:

- AccuRoute v2.1 / v2.2 / v2.3

If you are using AccuRoute v2.1, you must apply the AccuRoute Desktop v2.2 update to the Omtool server. This update includes Omtool DMS Libraries v2.2.

Note Currently, the Omtool DMS Libraries v2.3 are only available with the AccuRoute v2.3 server and client installations. The Omtool DMS Libraries v2.3 will be available as a separate download in the future.

- Accutrac XE API (available from Accutrac Software, Inc.) must be installed and the Accutrac XE Client software must be installed on the AccuRoute server and all systems running AccuRoute Desktop.
- The Accutrac XE Client installed on the AccuRoute server must not integrate with Microsoft Word.
- Tier 2 DMS connector license

Client requirements

The system where you install the Omtool DMS Libraries must meet the following minimum requirements:

- AccuRoute Desktop v2.2 or higher
- Accutrac XE API (available from Accutrac Software, Inc.) must be installed and the Accutrac XE Client software must be installed on each client workstation

Supported Accutrac XE versions

- Accutrac® XE™ v2.0.0.27 by Accutrac® Software, Inc.
- Accutrac® XE™ API v1.9 Build 63 by Accutrac® Software, Inc.

Note **AccuTrac XE v1.3 build 79 has been qualified.**

Section 3: Installation

This section includes:

[Installing the Accutrac XE API](#) (3-1)

[Adding the Accutrac XE connector](#) (3-3)

[Completing the Accutrac XE connector Configuration Wizard](#) (3-5)

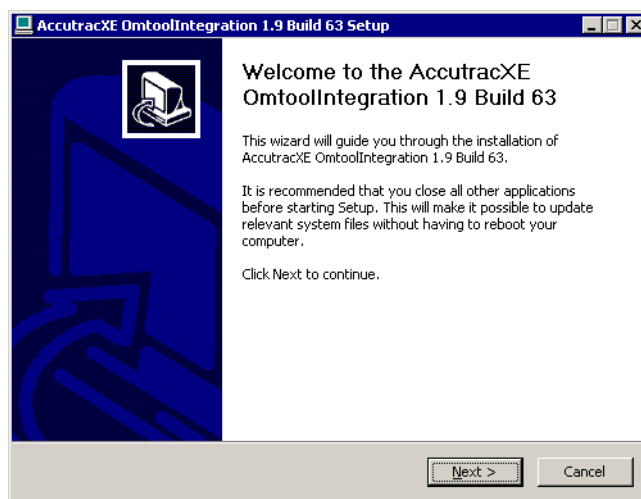
Installing the Accutrac XE API

After you install the AccuRoute Desktop v2.2 Update on the Omtool server and workstations running AccuRoute Desktop, you must install the Accutrac XE API.

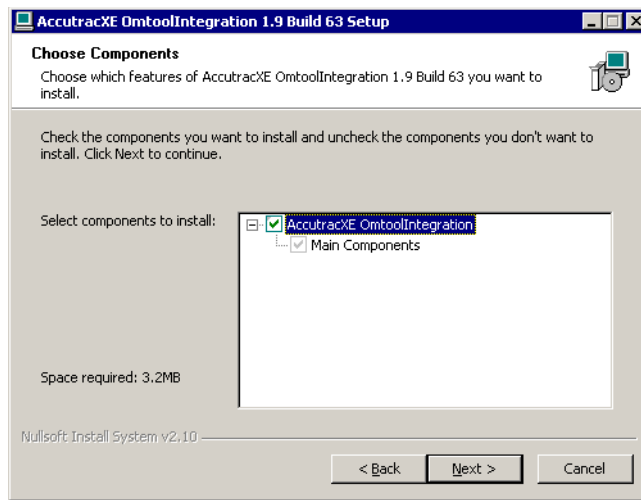
Note Accutrac XE Client software must be installed on the Omtool server and workstations prior to installing the Accutrac XE API.

To install the Accutrac XE API:

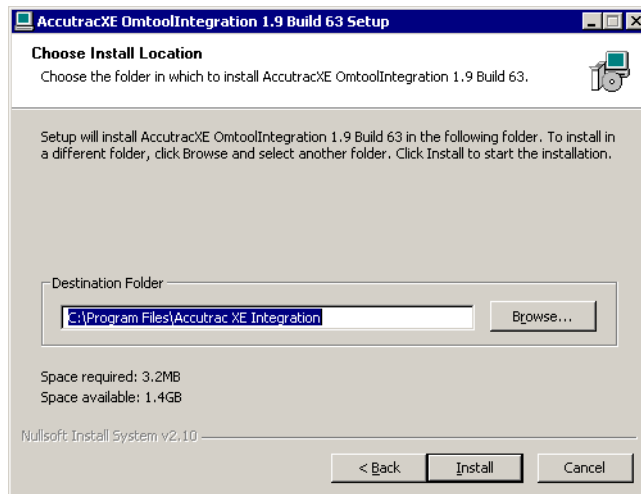
- I Go to the location where you saved **AccutracOmtoolSetupv1.9 Build 63.exe** and double-click it. The Welcome window appears.



- 2 Click **NEXT**. The Choose Components window appears.



- 3 Select the components you wish to install and click **Next**. The Choose Install Location window appears.



- 4 Verify the install location click **INSTALL**. The installation wizard installs the Accutrac XE API.
- 5 Click **FINISH**.

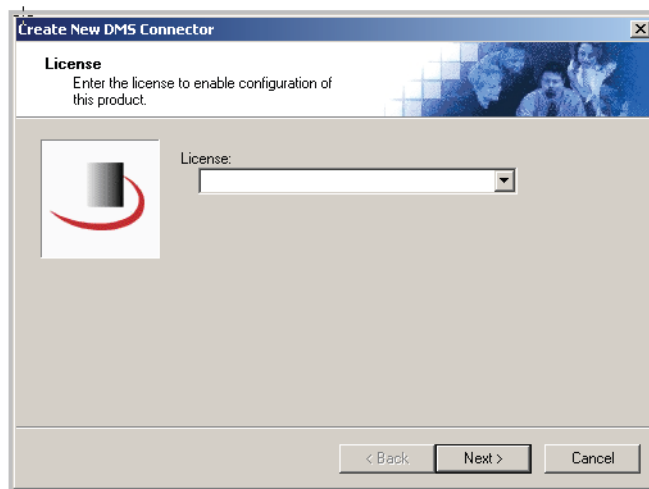
Continue to [Adding the Accutrac XE connector](#).

Adding the Accutrac XE connector

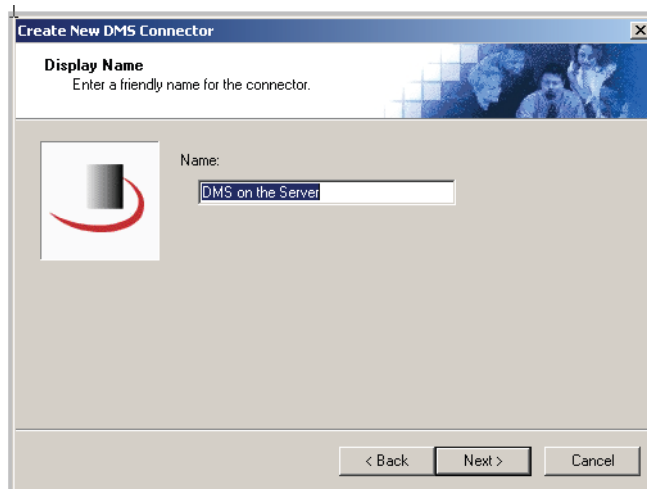
Note The Export Profile Information and Create Default Profile Information buttons are not applicable for the Accutrac XE DMS connector at this time.

To add the Accutrac XE connector to an AccuRoute server:

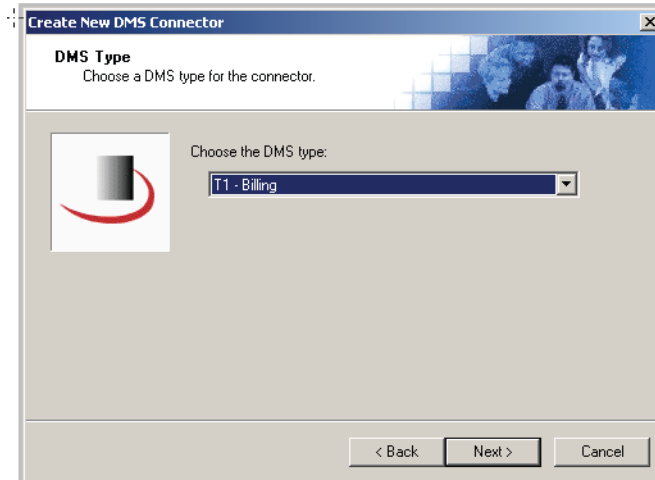
- 1 Right-click **CONNECTORS** in the console tree and select **NEW > DMS**. The License window appears.



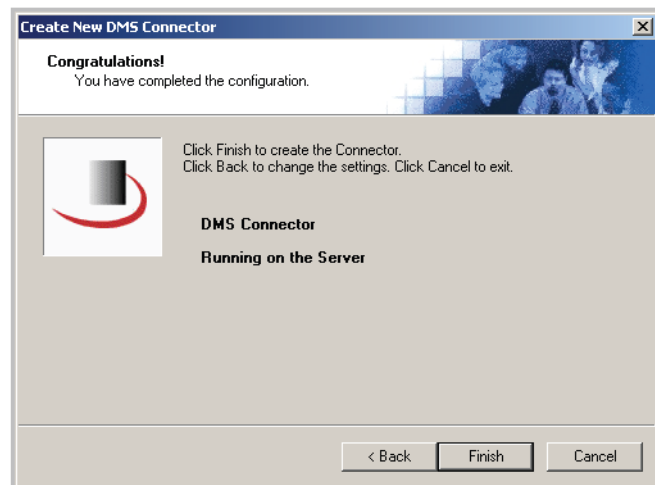
- 2 Type the license key for the Accutrac XE connector in the **LICENSE** text box and click **NEXT**. The Display Name window appears.



- 3 Type a friendly name for this connector in the **NAME** text box and click **NEXT**. The DMS Type window appears.



- 4 Select **T2 - ACCUTRAC** from the drop-down list and click **NEXT**. The Congratulations window appears.



The configuration complete window opens.

- 5 Click **FINISH** to create the connector.

The DMS configuration wizard launches and prompts you to configure the connector to support Accutrac XE.

Continue to [Completing the Accutrac XE connector Configuration Wizard](#).

Completing the Accutrac XE connector Configuration Wizard

[All Omtool applications on the same system share the Omtool DMS Libraries configuration](#) (3-5)

[Configuring a new Accutrac XE connector](#) (3-5)

[Configuring an existing Accutrac XE connector](#) (3-6)

Note Billing is not supported for Accutrac XE, therefore, the billing field names on the connector will be empty.

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.

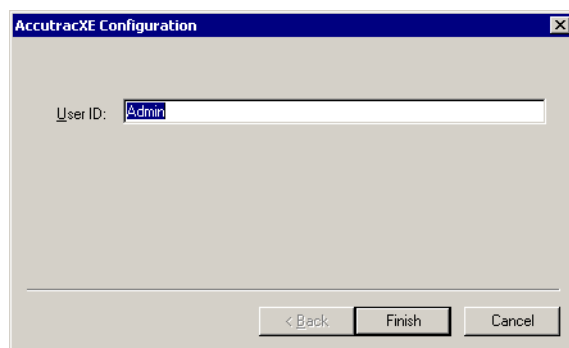
Configuring a new Accutrac XE connector

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

The AccutracXE Configuration window appears immediately after you complete the new connector wizard.

Figure 3-A: AccutracXE Configuration window

Enter the User ID on this window.



To complete the configuration wizard for a new Accutrac XE connector:

- 1 Type the Omtool user's Accutrac XE login name in the **USER ID** text box.
- 2 Click **FINISH**.

Configuring an existing Accutrac XE connector

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

To complete the configuration wizard for an existing Accutrac XE connector:

- 1 Click **CONNECTORS** in the console tree, and double-click the **ACCUTRAC** connector in the details pane.
- 2 Click the **ADVANCED** tab.
- 3 Locate the DMS Configuration section, and click **CONFIGURE**. The AccutracXE Configuration window appears.
- 4 Perform steps one through two in [Configuring a new Accutrac XE connector](#) (3-5).

Section 4: Required server configuration

This section includes:

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

Enabling Accutrac XE as a recipient type in AccuRoute Desktop

If you have added support for Accutrac XE 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 Accutrac XE 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 **ACCURROUTE** tab.
- 3 Select **ENABLE USE OF THE ACCURROUTE CLIENT**.
- 4 Locate **ALLOW USER TO ROUTE TO LIST** and select **ACCUTRAC XE**.
- 5 Click **OK** to save your changes.

Now when you start AccuRoute Desktop, Accutrac XE 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)

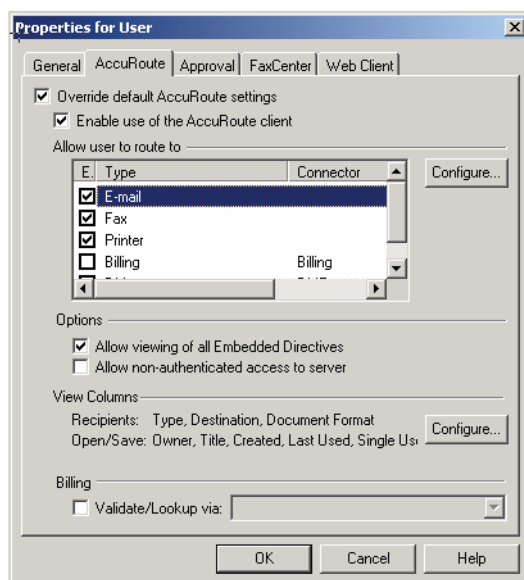
Changing the label of a document

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.

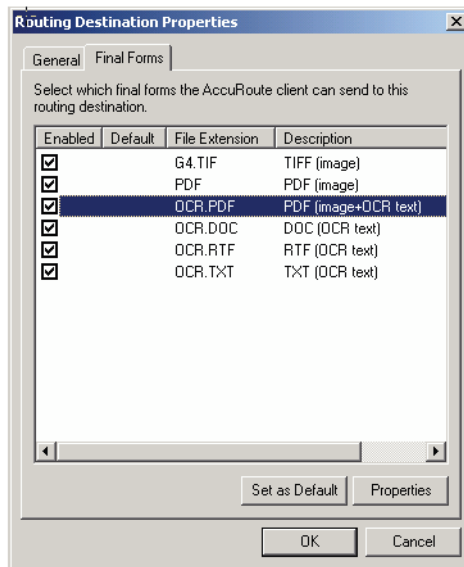
To change the label of a document type

- 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 **ACCURROUTE** tab.
- 3 Highlight an item in the ALLOW USER TO ROUTE TO list.

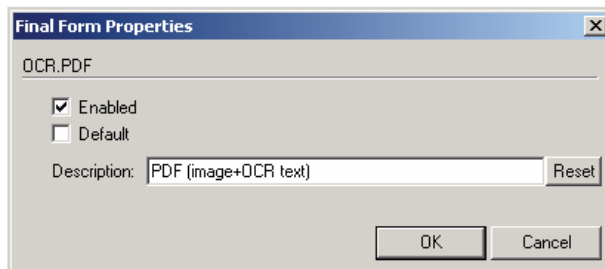


- 4 Click **CONFIGURE** and click the **FINAL FORMS** tab.
- 5 Highlight the document type that needs to be modified.

Section 5: Optional server configuration



- 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.

Section 6: Client configuration

This section includes:

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

[Client deployment methods](#) (6-1)

Configuring AccuRoute Desktop

To add Accutrac XE functionality to AccuRoute Desktop:

- 1 Start AccuRoute Desktop and log in.
- 2 Click **TOOLS** on the menu bar and select **CONFIGURE DMS**.
- 3 Select **ACCUTRAC XE** from the menu that appears. The AccutracXE Configuration window opens.
- 4 At this point, the configuration is identical to that of the connector configuration. Perform steps one through two in [Configuring a new Accutrac XE connector](#) (3-5).
- 5 Continue to [Client deployment methods](#).

Client deployment methods

There are two methods available for deploying clients to individual workstations with Accutrac XE functionality:

- Configure AccuRoute Desktop to support Accutrac XE 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 Accutrac XE for client rollout using AccuRoute Desktop](#).
- Install AccuRoute Desktop on each individual workstation and perform the configuration steps for Accutrac XE manually. Continue to [Configuring Accutrac XE manually](#).

Configuring Accutrac XE for client rollout using AccuRoute Desktop

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 Accutrac XE manually after you install AccuRoute Desktop.

To pre-configure the Omtool DMS Libraries for deployment:

- 1 Install AccuRoute Desktop v2.2.or higher on a workstation.
- 2 Configure the Omtool DMS Libraries to support Accutrac XE. 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 is installed, and copy the **OmDMSDB.xml** file to the clipboard.
- 4 Go to the Omtool server where AccuRoute Desktop setup files are located, and paste the file to the following location. When prompted to replace the existing file, click **YES**.

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

You have pre-configured the Omtool DMS Libraries setup with the configuration data for Accutrac XE. When you are ready to deploy Accutrac XE, launch setup.exe in the AccuRouteDesktop2.2 directory.

Configuring Accutrac XE manually

To configure Accutrac XE manually:

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

Section 7: Testing

This section includes:

[Sending a message to Accutrac XE using AccuRoute Desktop \(7-1\)](#)

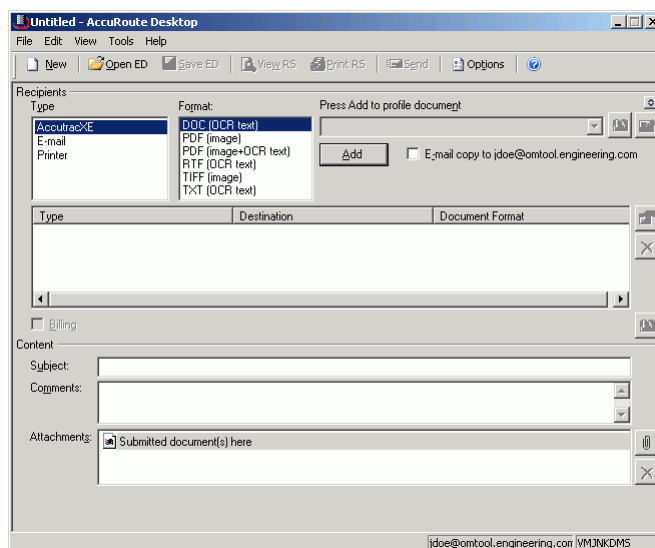
To test the installation and configuration of Omtool DMS Libraries v2.3 for Accutrac XE, send a message using AccuRoute Desktop.

For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to [Related documentation](#) on I-3.

Sending a message to Accutrac XE using AccuRoute Desktop

To send a message to Accutrac XE using AccuRoute Desktop:

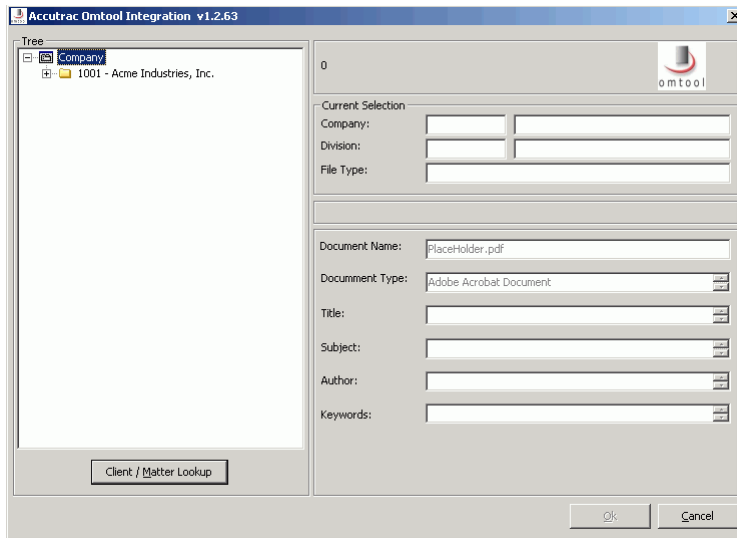
- 1 Start AccuRoute Desktop. Click **START**, go to the Omtool programs group, and select **ACCURROUTE DESKTOP**. Log in if prompted. The application appears on your desktop.



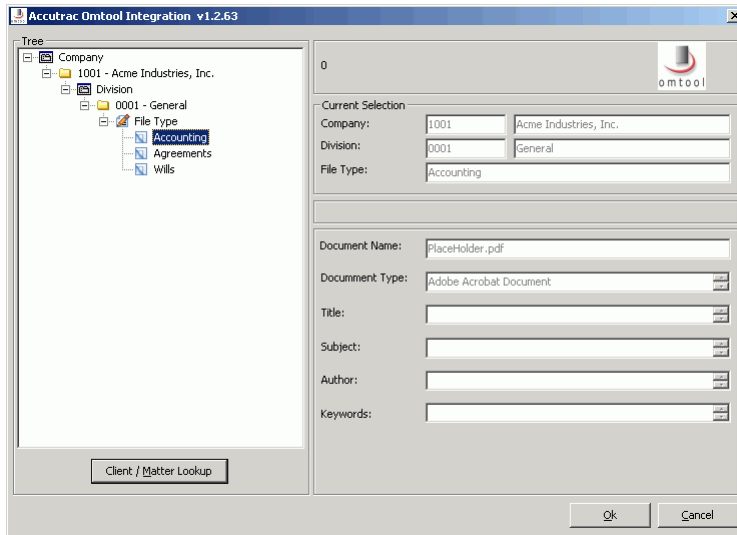
- 2 Select the destination type **ACCUTRACXE** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.

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

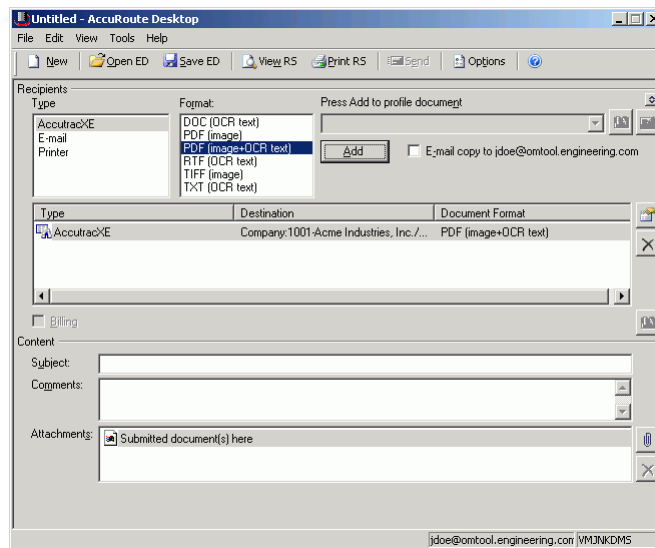
3 Click **ADD**. The Accutrac Omtool Integration v1.2.63 window appears.



4 Expand the Accutrac XE tree, select the appropriate location, and click **OK**. The Current Selection information is filled in.



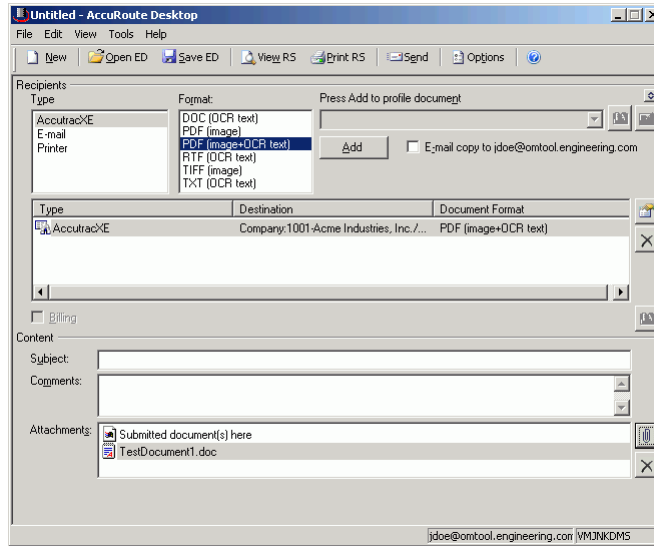
- 5 Enter any optional information and click **OK**. An OmtoolStub destination appears in the message.



Note When you create a Routing Sheet for Accutrac XE, AccuRoute creates a placeholder for the document. Never open, edit, or delete this placeholder.

- 6 Add content to your message.
- a Locate the **CONTENT** section at the bottom and type a subject and comments.
 - b 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**.

Section 7: Testing



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](#) (8-1)

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

[Troubleshooting the message on the Omtool server](#) (8-2)

[Troubleshooting the multifunction device](#) (8-4)

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

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

Detecting workflow issues

After a document has been profiled to Accutrac XE, 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 Accutrac XE, 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 Accutrac XE. Do some basic troubleshooting on Accutrac XE. If Accutrac XE is functioning correctly, troubleshoot the message on the Omtool server.

For information on troubleshooting Accutrac XE, consult Accutrac XE'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**.

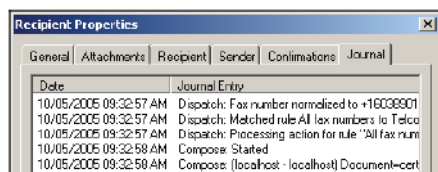


- c Sort all items by the date submitted.
 - d Look for the message.
- **Message found** - Double-click the message and then click the **JOURNAL** tab to view the message journal to determine the current state and status of the message. Then monitor the components and confirm that the message is moving 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.

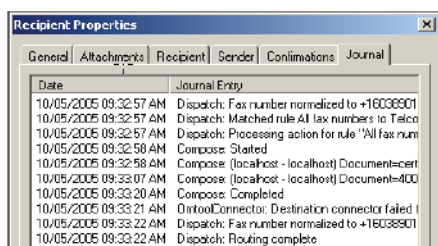
4 Look for the message in the History queue:

- 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 [Customer service and technical support](#) 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 Accutrac XE successfully. Do some advanced troubleshooting on Accutrac XE to determine why the message is not being

delivered to its destination. Contact Omtool if you are unable to resolve the issue. (Go to [Customer service and technical support](#) 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 Accutrac XE. If you are able to send messages to recipients other than Accutrac XE and Accutrac XE is operating correctly, contact Omtool. (Go to [Customer service and technical support](#) on the inside front cover.)