Omtool DMS Libraries v2.3 installation and integration guide for FileShare

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Contents

Section 1: Introduction

Omtool DMS Libraries integration with FileShare 1-1
Installation components 1-2
Deployment summary 1-2
Release notes 1-2
- Enhancements 1-2
- Resolutions 1-3
- Limitations 1-3

Related documentation 1-3

Section 2: Requirements

Server requirements 2-1
Client requirements 2-1

Section 3: Installation

Pre-configuring FileShare 3-1
- Creating a FileShare folder 3-1
- Example of high security configuration 3-2
- Example of low security configuration 3-2

Adding the FileShare connector 3-2
Completing the FileShare connector Configuration Wizard 3-4
- All Omtool applications on the same system share the Omtool DMS Libraries configuration 3-5
- Configuring a new FileShare connector 3-5

Section 4: Required server configuration

Enabling FileShare as a recipient type in AccuRoute Desktop 4-1

Section 5: Optional server configuration

Changing the label of a document 5-1
Configuring document link 5-2
- Installing the Omtool Web Client 5-3
- Defining an outbound rule 5-3
- Customizing the notification template 5-4

Section 6: Client configuration

Configuring AccuRoute Desktop 6-1
Client deployment methods 6-1
- Configuring FileShare for client rollout 6-2
- Configuring FileShare manually 6-2

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Section 7: Testing

Section 8: Troubleshooting

Detecting workflow issues....8-1
Troubleshooting the message on the Omtool server....8-1
Troubleshooting the multifunction device....8-3
Troubleshooting the client....8-3

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Section 1: Introduction

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

This section includes:

Omtool DMS Libraries integration with FileShare (1-1)

Installation components (1-2)

Deployment summary (1-2)

Release notes (1-2)

Related documentation (1-3)

Omtool DMS Libraries integration with FileShare

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

For more information on profiling documents to FileShare, go to Section 7: Testing.

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Installation components

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

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 FileShare:

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 FileShare. (Go to Section 7: Testing.)
6. Troubleshoot the installation. (Go to Section 8: Troubleshooting.)

Release notes

Enhancements

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

- Omtool DMS Libraries v2.3 for FileShare has been qualified with AccuRoute Desktop v2.2 or higher.
- You can now configure a default multiple use option within the FileShare connector Configuration Wizard. A new multiple use option, **CREATE UNIQUE DOCUMENT NAME**, has also been added. Selecting this option always adds a date/time stamp to the specified file name. See Knowledge Base Article K04171. (Go to Online resources on the inside front cover.)

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Resolutions

Omtool DMS Libraries v2.3 for FileShare 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 did not require AccuRoute Desktop to create a stub document before routing the document to the DMS application. See Knowledge Base Article K03805.

Limitations

Omtool DMS Libraries v2.3 for FileShare includes the following limitations:

The Profile dialog box "trails" when moved: When you select FileShare as a recipient type, the Profile dialog box opens. If you reposition the Profile dialog box to another location on the window, a copy of the Profile dialog box is left behind. This happens every time you try to reposition the Profile dialog box. Closing the front instance of the Profile dialog box closes all copies. See Knowledge Base Article K04136.

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 FileShare using AccuRoute Desktop -http://www.omtool.com/documentation/dmslibraries/v23/FileShare/OmtoolDMSLibrariesV23FileShareQuickStartGuide.pdf
- Administrator help - http://www.omtool.com/documentation/omtoolserver/v36/admin/index.htm

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Section 2: Requirements

This section includes:

Server requirements (2-1)
Client requirements (2-1)

Server requirements

The system where you install the DMS connector for FileShare 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 Librariesv2.3 are only available with the AccuRoute v2.3 server and client installations. The Omtool DMS Librariesv2.3 will be available as a separate download in the future.

- ❒ Tier 1 DMS connector license

Client requirements

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

- ❒ AccuRoute Desktop v2.2 or higher

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Section 3: Installation

This section includes:

Pre-configuring FileShare (3-1)

Adding the FileShare connector (3-2)

Completing the FileShare connector Configuration Wizard (3-4)

Pre-configuring FileShare

There are two options available when you configure FileShare. You can select either the user's Home folder or you can specify a directory structure. If you select the user's Home folder no pre-configuration is required. The user's home folder is configured in Active Directory. For more information, consult your Active Directory documentation.

If you are specifying a directory structure, however, before you can complete the configuration wizard for FileShare, you must create the FileShare directory structure in the local area network.

Continue to Creating a FileShare folder.

Creating a FileShare folder

Tip For more information on sharing properties, sharing permissions, and security permissions, consult Windows help.

Create a FileShare folder in the local area network. This folder must meet the following requirements:

- The FileShare folder must be shared. Additionally, the sharing permissions must grant read access to all Windows users who should be able to route documents to the FileShare folder.
- The security permissions must grant read and write access to all Windows users who should be able to route documents to the FileShare folder.
- If you are connecting via HTTP or HTTPS to an AccuRoute server in a different domain and the FileShare directory is configured on the local system, you must specify the location of the FileShare directory using the IP address. The Omtool server may have problems resolving the server name to an actual IP address due to DNS issues. Using the IP address eliminates the DNS issues.
- Set permissions for the ...\Program Files\Common Files\Omtool directory. The Domain Users group (or other appropriate user group) requires read/write permissions to this directory.

Note If a user does not have permission to read a file or folder, it will not appear in the file list.

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The sharing permissions and security permissions on this folder should be configured according to the needs of your organization. Examples of a high security configuration and a low security configuration follow.

Example of high security configuration

In some instances, you might want to maintain a high level of security on this folder. The following details provide you with an example of how you can set up this configuration with optimal security measures.

- Select the Windows user account that the Omtool DMS Libraries should use to route documents to the FileShare folder.
- Share the FileShare folder and grant read and change permissions only to the Windows user account that the Omtool DMS Libraries should use to route documents to the FileShare folder.
- Configure security permissions only for the Windows user account that the Omtool DMS Libraries should use to route documents to the FileShare folder. The security permissions must enable the Windows user to read and write to the folder.
- Configure the Omtool DMS Libraries to route documents to the FileShare folder using the Windows user account that has the required access and permissions to the FileShare folder.

Example of low security configuration

In some instances, you might want to maintain a lower level of security on this folder. The following details provide you with an example of how you can set up this configuration with the lowest possible security measures.

- Share the FileShare folder and grant read permissions to everyone or to groups that can route documents to the FileShare folder.
- Configure security permissions for everyone or for groups that can route documents to the FileShare folder. The security permissions must enable users or groups to read and write to the folder.
- Configure the Omtool DMS Libraries to route documents to the FileShare folder using the current Windows user account. (The system where the Omtool DMS Libraries is installed uses the login credentials of the current Windows user to access the FileShare folder.)

Adding the FileShare connector

To add the FileShare connector to an AccuRoute server:

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

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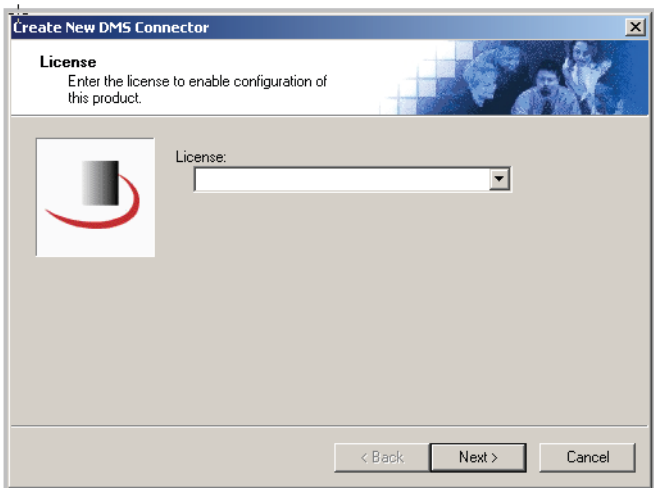
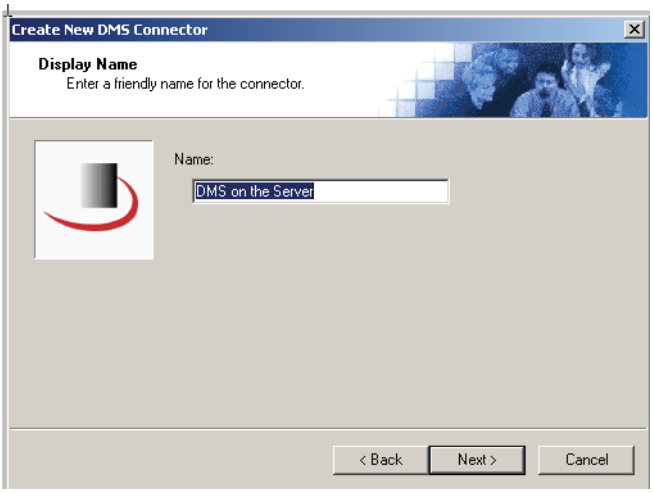
The License window appears.



2 Type the license key for the FileShare 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.

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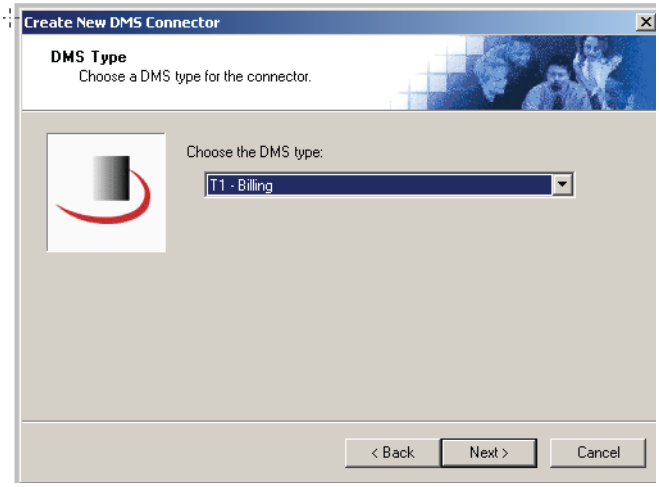
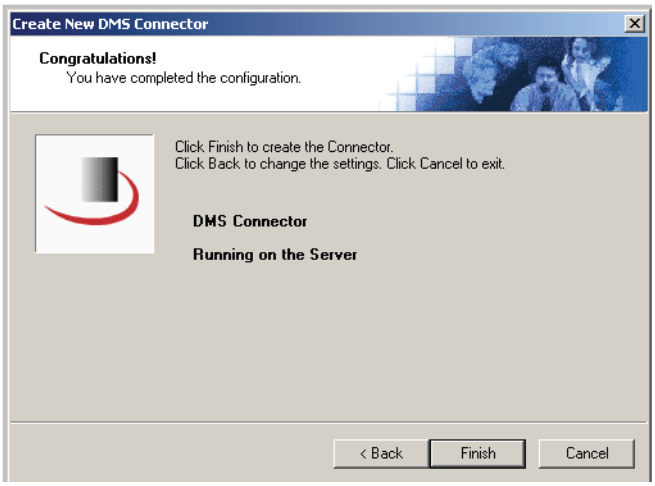


4 Select **T1 - FILESHARE** from the drop-down list and click **NEXT**. The Congratulations window appears.



5 Click **FINISH**.

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

6 Continue to Completing the FileShare connector Configuration Wizard.

Completing the FileShare connector Configuration Wizard

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

Configuring a new FileShare connector (3-5)

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

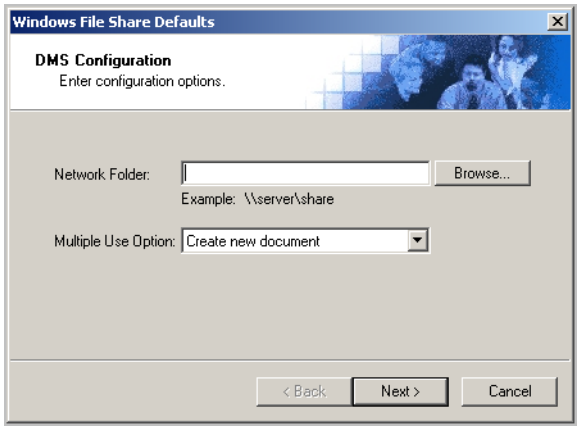
When multiple Omtool applications are installed on the same system, these applications share the same DMS configuration data. If you make changes to the DMS configuration settings for one Omtool application, those changes affect all Omtool applications installed on the system.

Configuring a new FileShare connector

The Windows FileShare Default Location window appears immediately after you complete the new connector wizard.

Figure 3-A: **Windows FileShare Default Location window**

Enter the Network Folder where FileShare files are located and then select a Multiple Use Option on this window.



Note The configuration wizard does not create the FileShare folder. It should already exist in the local area network. If the FileShare folder does not exist, create the folder now. (Go to Creating a FileShare folder on 3-1.) Then, continue the configuration wizard.

To complete the configuration wizard for a new FileShare connector:

1. Specify the location of the FileShare folder in the **NETWORK FOLDER** text box. (Use a UNC path. For example: `\\ComputerName\FolderName`). Enter the location of the FileShare folder, or click **BROWSE**, go to the FileShare folder, select it, and click **OK**.

   If you are configuring the DMS connector on an AccuRoute server, leave this field blank. When routing documents on behalf of an AccuRoute Desktop user, the server uses the DMS configuration data from the workstation where the user generated the Routing Sheet.

2. From the **MULTIPLE USE OPTION** drop-down list, select a default option for multiple use Routing Sheets.

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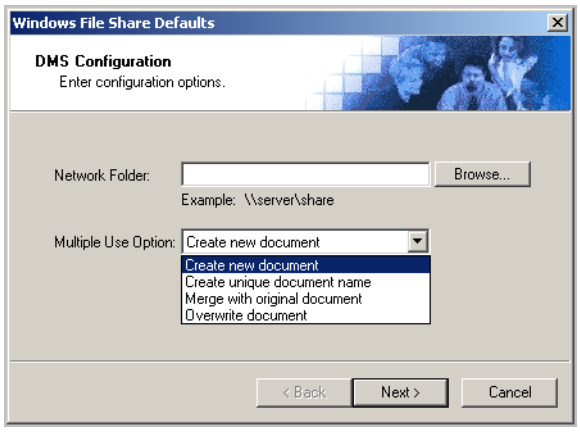
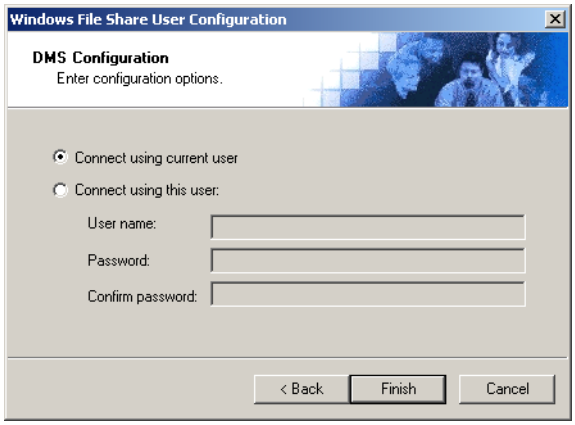


- **CREATE NEW DOCUMENT -** Selecting this option creates a new document in FileShare.
- **CREATE UNIQUE DOCUMENT NAME** - Selecting this option always adds a date/time stamp to the specified file name.
- **MERGE WITH ORIGINAL DOCUMENT -**If a document already exists with the file name you selected, this option merges any file attachments with the original document. The resulting file is stored with the original file name. After the message is sent, any attachments on this message will be merged with the original document, resulting in one document stored in FileShare. This option is only available when you select **PDF (IMAGE)** or **PDF (IMAGE+OCR TEXT)** as your document format.
- **OVERWRITE DOCUMENT -** If a document already exists with the file name you selected in Step 4, selecting this option overwrites the original file. Click **YES** when the following message appears to replace the file or click **NO** to return to the FileShare window.

3 Click **NEXT**. The Windows File Share user Configuration window appears.



4 Select an authentication method:

CONNECT USING CURRENT USER - Select this option to connect to the FileShare folder using the login credentials of the current Windows user. (This setting is recommended for single-user workstations.)

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Section 4: Required server configuration

This section includes:

Enabling FileShare as a recipient type in AccuRoute Desktop (4-1)

Enabling FileShare as a recipient type in AccuRoute Desktop

If you have added support for FileShare 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 FileShare 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 **FileShare**.
5. Click **OK** to save your changes.

Now when you start AccuRoute Desktop, FileShare 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.

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Section 5: Optional server configuration

This section includes:

Changing the label of a document (5-1)
Configuring document link (5-2)

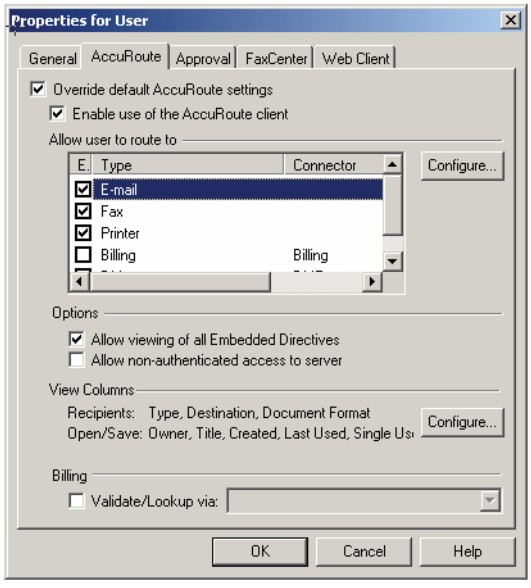
Changing the label of a document

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.



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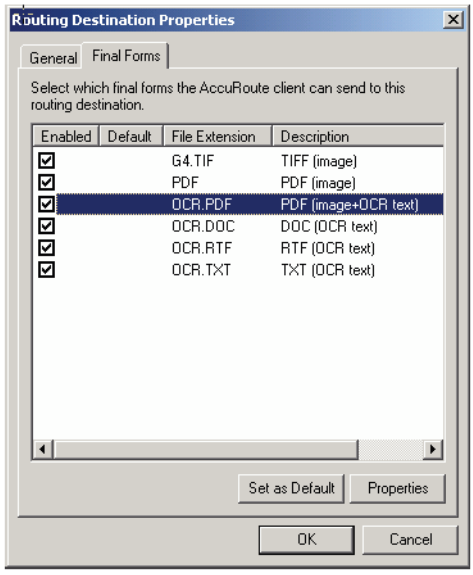
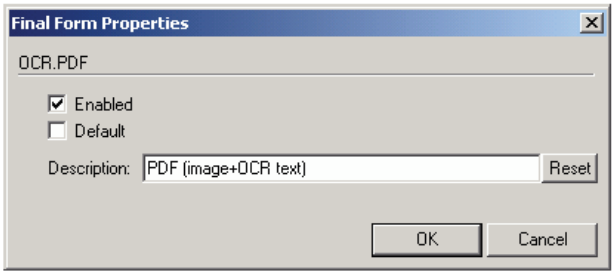
4 Click CONFIGURE and click the FINAL FORMS tab.

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 (5-4)

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

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

- AccuRoute server v2.1or higher
- AccuRoute Desktop v2.2 or higher
- 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 at:

http://www.omtool.com/documentation/omtoolserver/v332/webclient/omtoolwebclientinstallationguide.pdf.

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. http://www.omtool.com/documentation/omtoolserver/v331/admin/

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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:

1. Use WordPad to open the following file:

   ...\Omtool\Omtool Server\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%
```

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Section 6: Client configuration

This section includes:

Configuring AccuRoute Desktop (6-1)
Client deployment methods (6-1)

Configuring AccuRoute Desktop

To add FileShare functionality to AccuRoute Desktop:

1. Start AccuRoute Desktop and log in.
2. Click **TOOLS** on the menu bar and select **CONFIGURE DMS**.
3. Select **FILESHARE** from the menu that appears. The Windows FileShare Default Location window appears.

At this point, the configuration is identical to that of the connector configuration. Perform steps one through four in Configuring a new FileShare connector (3-5).

Note Make sure to enter the UNC path when configuring FileShare within AccuRoute Desktop.

Continue to Client deployment methods.

Client deployment methods

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

- Configure AccuRoute Desktop to support FileShare 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 FileShare for client rollout.
- Install AccuRoute Desktop on each individual workstation and perform the configuration steps for FileShare manually. Continue to Configuring FileShare manually.

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Configuring FileShare 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 FileShare 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 FileShare. Select the settings that should apply to all workstations in your environment.
3. Go to the ...\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 FileShare. When you are ready to deploy FileShare, launch setup.exe in the AccuRouteDesktop directory.

Configuring FileShare manually

To configure FileShare manually:

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

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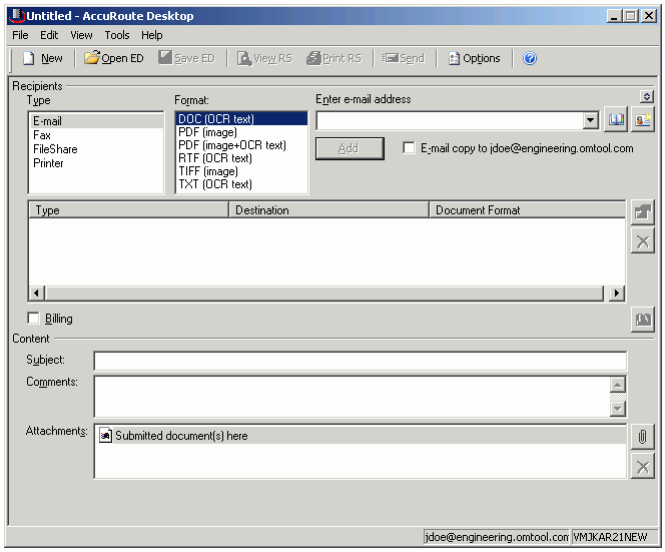
Section 7: Testing

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

For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to Related documentation on 1-3.

To send a message to FileShare 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 **FILESHARE** 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.

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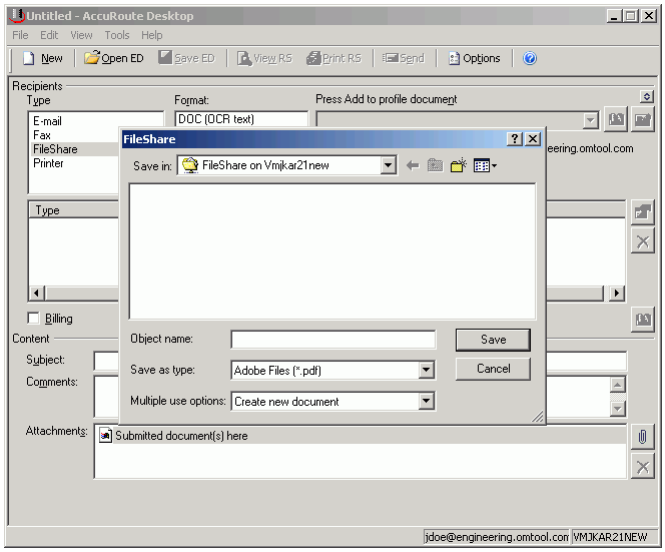
3 Click **ADD**. The FileShare window appears.



4 In the **FILE NAME** text box, enter the file name you wish to assign to your document.

The **SAVE AS TYPE** defaults to match the document format you selected in Step 2.

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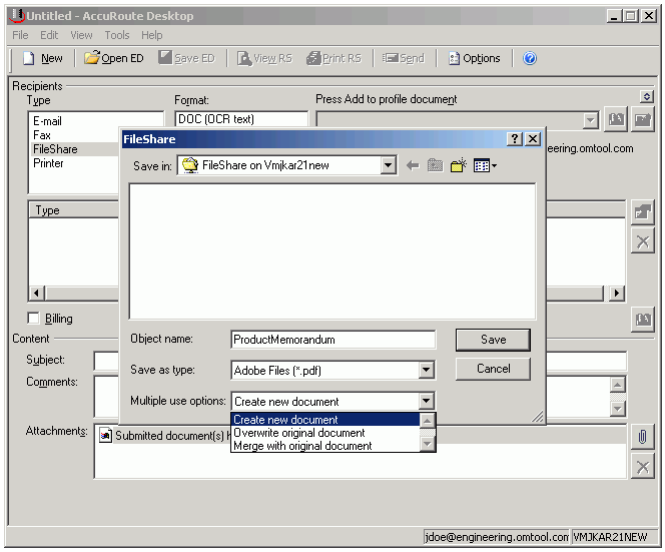
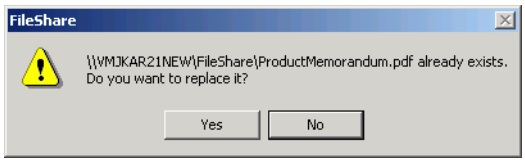
5 From the **MULTIPLE USE OPTIONS** drop-down list, select one of the following:

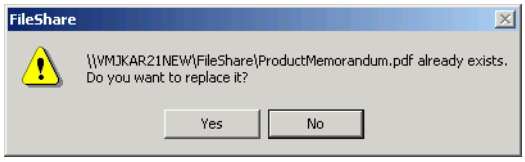


CREATE NEW DOCUMENT - Selecting this option creates a new document in FileShare. If you select this option and the file name already exists, the following message appears. Click **YES** to replace the file or click **NO** to return to the FileShare window.



CREATE A UNIQUE DOCUMENT NAME - Selecting this option always adds a date/time stamp to the specified file name.

OVERWRITE DOCUMENT - If a document already exists with the file name you selected in Step 4, selecting this option overwrites the original file. Click **YES** when the following message appears to replace the file or click **NO** to return to the FileShare window.



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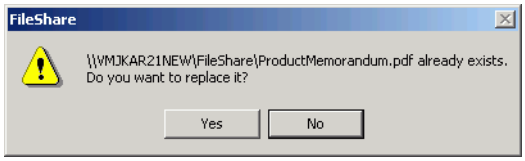
MERGE WITH ORIGINAL DOCUMENT - If a document already exists with the file name you selected in step 4, selecting this option merges any file attachments with the original document. The resulting file is stored with the original file name.

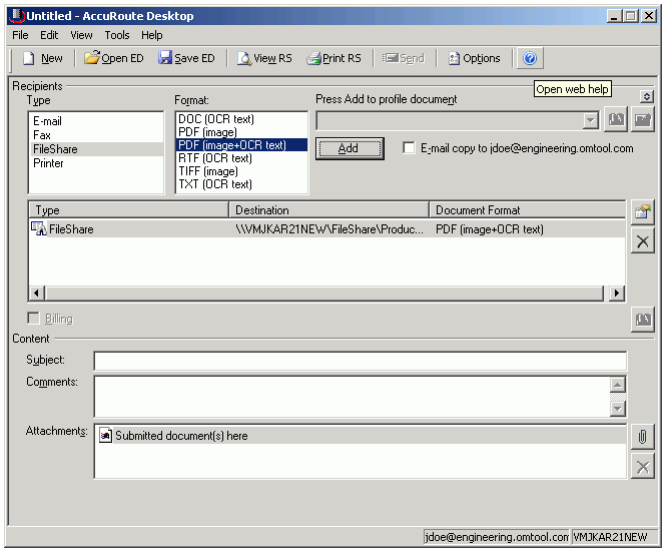
Click **YES** when the following message appears to merge the documents or click **NO** to return to the FileShare window.



After the message is sent, any attachments on this message will be merged with the original document, resulting in one document stored in FileShare.

This option is only available when you select **PDF (IMAGE)** or **PDF (IMAGE+OCR TEXT)** as your document format.

6 Click **SAVE**. A FileShare destination appears in the message.



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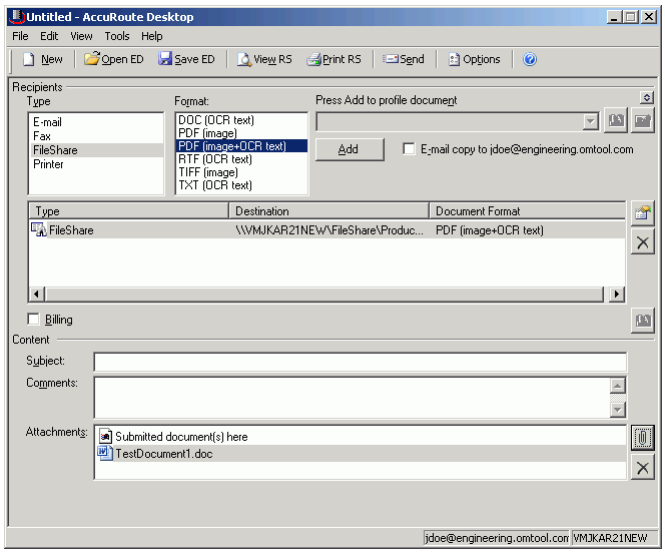
7 Add content to your message.

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**.



8 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.)

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.)

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Section 8: Troubleshooting

This section includes:

Detecting workflow issues (8-1)

Troubleshooting the message on the Omtool server (8-1)

Troubleshooting the multifunction device (8-3)

Troubleshooting the client (8-3)

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

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.

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To locate the message on the Omtool server:

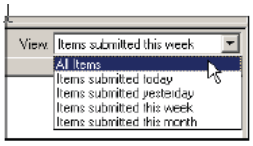
1 Start the Administrator.

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**.



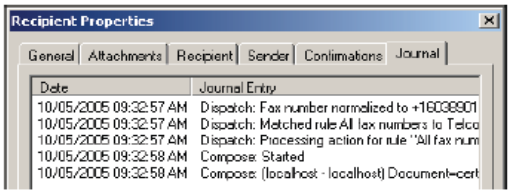
c Sort all items by the date submitted.

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.

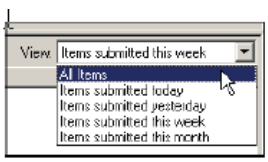


- **Message not found** - Go to step 4 and look for the message in the History queue.

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.

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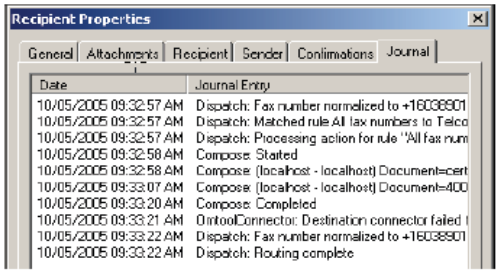
d Look for the message.

- **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 FileShare successfully. Do some advanced troubleshooting on FileShare 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 an 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 FileShare. If you are able to send messages to recipients other than FileShare and FileShare is operating correctly, contact Omtool. (Go to Customer service and technical support on the inside front cover.)

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