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

January 13, 2009

omtool

Omtool, Ltd.

6 Riverside Drive Andover, MA 01810 Phone: 978-327-5700 Toll-free in the US: 800-886-7845 Fax: 978-659-1300

Omtool Europe

25 Southampton Buildings London WC2A IAL United Kingdom Phone: +44(0) 203 043 8580 Toll-free in the UK: +44(0) 800 011 2981 Fax: +44(0) 203 043 8581

Web: http://www.omtool.com

© 2009 by Omtool, Ltd. All rights reserved. Omtool™, AccuRoute® and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Omtool product documentation is provided as part of the licensed product. As such, the documentation is subject to the terms outlined in the End User License Agreement. (You are presented with the End User License Agreement during the product installation. By installing the product, you consent to the terms therein.)

Permission to use the documentation is granted, provided that this copyright notice appears in all copies, use of the documentation is for informational and non-commercial or personal use only and will not be copied or posted on any network computer or broadcast in any media, and no modifications to the documentation are made. Accredited educational institutions may download and reproduce the documentation for distribution in the classroom. Distribution outside the classroom requires express written permission. Use for any other purpose is expressly prohibited by law.

Omtool and/or its suppliers make no guaranties, express or implied, about the information contained in the documentation. Documents and graphics contained therein could include typographical errors and technical inaccuracies. Omtool may make improvements or changes to the documentation and its associated product at any time.

Omtool support and sales

Online resources

The Omtool web site provides you with 24-hour access to documentation, software updates and other downloads, and detailed technical information that can help you troubleshoot issues. Go to <u>http://www.omtool.com/support</u> and log in using your customer number. Then click one of the following:

- **KNOWLEDGE BASE** to access technical articles.
- **DOWNLOADS & DOCS** to access online documentation, software updates, and downloads.

Customer service and technical support

Contact Omtool Customer Service or Technical Support using any of the following methods:

- **Phone**: 888-303-8098 (toll-free in the US)
- **Fax**: 978-659-1301
- E-mail: customerservice@omtool.com or support@omtool.com

Technical support requires an active support contract. For more information, go to <u>http://www.omtool.com/support/</u><u>entitlements.cfm</u>.

Sales, consulting services, licenses, and training

Contact Omtool Sales using any of the following methods:

- **Phone**: 978-327-5700 or 800-886-7845 (toll-free in the US)
- **Fax**: 978-659-1300
- E-mail: <u>sales@omtool.com</u>

Contents

Section I: Introduction

Omtool DMS Libraries integration with MyFolder	
Installation components	, -
Deployment summary	.1-2
Release notes	.1-2
Enhancements	.1-2
Resolutions	.1-2
Limitations	.1-2
Related documentation	. I - 3

Section 2: Requirements

Server requirements	
Client requirements	

Section 3: Installation

Pre-configuring MyFolder	3-1
Creating a directory structure to support MyFolder	
Setting sharing permissions and security permissions	3-2
Adding the MyFolder connector	
Completing the MyFolder connector Configuration Wizard	
All Omtool applications on the same system share the Omtool DMS Libraries configuration	3-6
Configuring a new MyFolder connector	3-6
Configuring an existing MyFolder connector	

Section 4: Sharing and security permissions

0 /1	
Introduction4-	L
Requirements4-	L
Security considerations	
Setting permissions for MyFolder users4-2	
Top-level folder (MyFolder)	
Second-level folder (domain or workgroup name)4-9	
Setting the required permissions for the Omtool server Windows account	

Section 5: Required server configuration

Enabling MyFolder as a recipient type in AccuRoute Desktop5-1

Section 6: Optional server configuration

Changing the label of a document6-1

Section 7: Client configuration	
Configuring AccuRoute Desktop	7-I
Client deployment methods	
Configuring MyFolder for client rollout	7-2
Configuring MyFolder manually	7-2

Section 8: Testing

Section 9: Troubleshooting

Detecting workflow issues	9-1	L
Troubleshooting the message on the Omtool server	9-1	I
Troubleshooting the multifunction device		
Troubleshooting the client	9-3	3

Section I: Introduction

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

This section includes:

Omtool DMS Libraries integration with MyFolder (1-1) Installation components (1-1) Deployment summary (1-2) Release notes (1-2) Related documentation (1-3)

Omtool DMS Libraries integration with MyFolder

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

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

For more information on profiling documents to MyFolder, go to Section 8: Testing.

Installation components

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

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

1-2

Deployment summary

To deploy Omtool DMS Libraries v2.3 for MyFolder:

- I Complete the installation requirements. (Go to <u>Section 3: Installation</u>.)
- 2 Configure sharing and security permissions. (Go to <u>Section 4: Sharing and security permissions</u>.)
- 3 Complete required server configuration. (Go to Section 5: Required server configuration.)
- 4 Complete any optional server configuration. (Go to <u>Section 6: Optional server configuration</u>.)
- 5 Complete the client configuration. (Go to <u>Section 7: Client configuration</u>.)
- 6 Test profiling a document into MyFolder. (Go to <u>Section 8: Testing</u>.)
- 7 Troubleshoot the installation. (Go to <u>Section 9: Troubleshooting</u>.)

Release notes

Enhancements

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

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

Resolutions

Omtool DMS Libraries v2.3 for MyFolder 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 required AccuRoute Desktop to create a stub document before routing the document to the DMS application. See Knowledge Base Article K03805. (Go to <u>Online resources</u> on the inside front cover.)

Limitations

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

The Profile dialog box "trails" when moved: When you select MyFolder 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. (Go to <u>Online resources</u> on the inside front cover.)

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

• **MyFolder can not use the Home folder as a destination**: When a home folder is configured for each user in Active Directory in Users and Computers, and MyFolder is configured with the "Home Folder" and "Connect using current user options", when a user tries to add a MyFolder destination in AccuRoute Desktop, the following error appears: "Failed to profile document". See Knowledge Base Article K04126. (Go to Online resources on the inside front cover.)

Related documentation

- AccuRoute Desktop installation guide <u>http://www.omtool.com/documentation/AccuRoute/v22/</u> <u>AccuRouteDesktop/AccuRouteDesktopV22InstallGuide.pdf</u>
- AccuRoute Desktop users guide <u>http://www.omtool.com/documentation/AccuRoute/v22/</u> <u>AccuRouteDesktop/AccuRouteDesktopV22UserGuide.pdf</u>
- Sending a message to MyFolder using AccuRoute Desktop http://www.omtool.com/documentation/ dmslibraries/v22/MyFolder/OmtoolDMSLibrariesV23MyFolderQuickStartGuide.pdf
- Administrator help <u>http://www.omtool.com/documentation/omtoolserver/v36/admin/index.htm</u>

1-3

1-4

Section 1: Introduction

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

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 MyFolder 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 I DMS connector license

Client requirements

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

AccuRoute Desktop v2.2 or higher

2-2

Section 2: Requirements

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

3-1

Section 3: Installation

This section includes:

<u>Pre-configuring MyFolder</u> (3-1) <u>Adding the MyFolder connector</u> (3-3) <u>Completing the MyFolder connector Configuration Wizard</u> (3-5)

Pre-configuring MyFolder

There are two options available when you configure MyFolder. 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 for MyFolder. (Go to <u>Adding the MyFolder connector</u> on 3-3.) 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 MyFolder, you must create the MyFolder directory structure in the local area network.

Continue to Creating a directory structure to support MyFolder.

Creating a directory structure to support MyFolder

To create the MyFolder directory structure:

- I Create the top level folder and name it **MyFolder**. (If desired, you can choose a different name for this folder.)
- If you are in a domain, identify the domains where Windows users route documents to MyFolder, and create a level 2 subfolder for each domain. The folder name must be the same as the domain name. For example, when the domain name is WindowsDomain, the folder must be called WindowsDomain.

–Or–

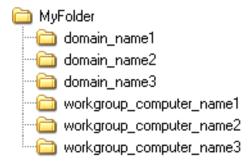
If you are in a workgroup, identify the workgroups where Windows users route documents to MyFolder, and create a level 2 subfolder for each workgroup computer. The folder name must be the same as the workgroup computer name. For example, when the computer name is **WorkgroupComputer**, the folder must be called **WorkgroupComputer**.

Tip

You do not need to create individual folders for each Windows user. When a Windows user routes a document the first time, the level 3 folder is created automatically. Section 3: Installation

When you finish creating the directory structure, it might look similar to the following example:

Figure 3-A: Directory structure



The above illustration demonstrates a valid directory structure for MyFolder.

Continue to <u>Setting sharing permissions and security permissions</u>. Read about MyFolder security, and then configure permissions on MyFolder.

Setting sharing permissions and security permissions

After you create the directory structure for MyFolder, configure the sharing and security permissions.

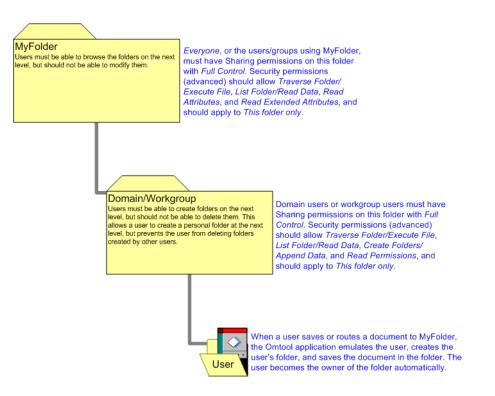
The minimum required sharing and security permissions allow users to do the following:

- All MyFolder users must be able to access all levels of the MyFolder structure.
- All MyFolder users must be able to create folders on the level below the domain or workgroup folder.
- All MyFolder users become the owner of their respective personal folders, but cannot access or modify the contents of other users' folders.
- The Windows account associated with the AccuRoute server must have access all levels of the MyFolder structure and security permissions with full control.
- If you are connecting via HTTP or HTTPS to an AccuRoute server in a different domain and the MyFolder directory is configured on the local system, you must specify the location of the MyFolder 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 c:\Program Files\Common Files\Omtool directory. The Domain Users group (or other appropriate user group) requires read/write permissions to this directory.

Figure 3-B: Minimum requirements for MyFolder

3-2

3-3



The above diagram illustrates the minimum requirements for MyFolder users.

For detailed instructions on configuring sharing and security permissions for MyFolder, go to <u>Section 4: Sharing and</u> <u>security permissions</u> (4-1). For more information on sharing and security permissions, consult Windows help.

Continue to Adding the MyFolder connector.

Adding the MyFolder connector

Note

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

To add the MyFolder connector to an AccuRoute server:

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

Section 3: Installation

Create New DMS Connector	X
License Enter the license to enable configuration of this product.	C AV
License:	×
	< Back Next > Cancel

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

Create New DMS Connector Display Name Enter a friendly name for the connector.	×
Name:	
	< Back Next > Cancel

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

```
3-4
```

3-5

Create New DMS Connector	×
DMS Type Choose a DMS type for the connector.	Cart.
Choose the DMS type:	¥.
	<back next=""> Cancel</back>

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

Create New DMS Connector
Congratulations! You have completed the configuration.
Click Finish to create the Connector. Click Back to change the settings. Click Cancel to exit.
DMS Connector
Running on the Server
< Back Finish Cancel

5 Click FINISH.

The DMS configuration wizard launches and prompts you to configure the connector to support MyFolder. Continue to <u>Completing the MyFolder connector Configuration Wizard</u>.

Completing the MyFolder connector Configuration Wizard

<u>All Omtool applications on the same system share the Omtool DMS Libraries configuration</u> (3-6) <u>Configuring a new MyFolder connector</u> (3-6)

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Configuring an existing MyFolder connector (3-7)

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 MyFolder connector

The MyFolder Location window appears immediately after you complete the new connector wizard.

Figure 3-C: MyFolder Location window

Select the location to store your MyFolder documents on this window.

MyFolder Location	×
DMS Configuration Enter configuration options.	
 C Use user's Home Folder I use this location: Example: \\server\share 	Browse
	< Back Next > Cancel

To complete the configuration wizard for a new MyFolder connector:

I Indicate the location of the MyFolder directory. Select **USE USER'S HOME FOLDER** to select the user's home folder as defined in their Windows NT profile; or, select **USE THIS LOCATION**, click **BROWSE**, go to the MyFolder directory, select it, and click **OK**. For more information on the user's Home folder, see your Active Directory documentation.

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.

Click NEXT. The MyFolder Connection Credentials window appears.

3-6

MyFolder Connection Crede	ntials		×
DMS Configuration Enter configuration optio	ıs.		
Connect using curren			
Connect using this us	er:		
User name:			
Password:			
Confirm password:			
	< Bac	k Finish	Cancel

3 Select an authentication method:

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

CONNECT USING THIS USER - Select this option to connect to the MyFolder directory using specific login credentials, and type the user name and password in the **USER NAME**, **PASSWORD**, and **CONFIRM PASSWORD** text boxes.

If you are configuring the DMS connector on the AccuRoute server, Omtool strongly recommends that you select **CONNECT USING THIS USER** and provide the login credentials of the Windows user account associated with the AccuRoute server. In rare circumstances when the AccuRoute server cannot obtain the Windows login credentials of the AccuRoute Desktop user, the server uses these login credentials. This reduces the possibility of an authentication failure.

4 Click **FINISH**.

Configuring an existing MyFolder connector

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

To complete the configuration wizard for an existing MyFolder connector:

- I Click **CONNECTORS** in the console tree, and double-click the **MyFOLDER** connector in the details pane.
- 2 Click the **ADVANCED** tab.
- 3 Locate the **DMS CONFIGURATION** section, and click **CONFIGURE**. The MyFolder Location window appears.
- 4 Perform steps one through four in <u>Configuring a new MyFolder connector</u> (3-6)

Note

3-8

Section 3: Installation

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Section 4: Sharing and security permissions

This section includes:

Introduction (4-1) Requirements (4-1) Security considerations (4-2) Setting permissions for MyFolder users (4-2) Setting the required permissions for the Omtool server Windows account (4-17)

Introduction

This section contains detailed instructions on setting sharing and security permissions for MyFolder.

In order to complete the procedures in this section, you should be familiar with Windows sharing and security permissions. For additional information on Windows permissions, consult Windows help.

The procedures described in this section apply to Windows 2003/2000 servers.

Continue to <u>Requirements</u>.

Requirements

Before you proceed, verify that you have created the required folders for MyFolder. As a minimum, you must have a top-level folder, called MyFolder or some other name, and a second-level folder for each domain or workgroup to which MyFolder users belong.

Continue to Security considerations.

Security considerations

Section 4: Sharing and security permissions

This section outlines the minimum required permissions for MyFolder users. By implementing these permissions, you enable MyFolder users to access and modify the contents of their personal folders only. Users cannot modify the contents of another user's folder. If desired, you can allow additional permissions as necessary.

Continue to Setting permissions for MyFolder users.

Setting permissions for MyFolder users

Top-level folder (MyFolder)

Using the following procedure, set the sharing and security permissions for MyFolder users on the top-level folder in the structure. This folder might be called MyFolder or some other name.

This procedure instructs you to give Everyone sharing permissions with Full Control and special read security permissions that apply to this folder only. Omtool recommends that you use Everyone as documented in the following procedure. However, as an alternative to Everyone, you can add only the users or groups that use MyFolder.

To set the sharing and security permissions on the top-level folder:

- I Go to the top-level folder using Windows Explorer. Right-click the folder and select **PROPERTIES**.
- 2 Click the **SHARING** tab.

yFolder	Propert	ies 🤶
General	Sharing	Security Web Sharing Customize
		n share this folder with other users on your k. To enable sharing for this folder, click Share this
ΟD	o <u>n</u> ot sha	re this folder
	hare this I	folder
Share	e name:	
Com	nent:	
User	limit:	€ Maximum allowed
		C Allow this number of users:
		ions for users who access this network, click Permissions.
To co Cach		ettings for offline access, click Caching
		OK Cancel Apply

Permissions for MyFolder		<u>? ×</u>
Share Permissions		
Group or user names:		
S Everyone		
	A <u>d</u> d	<u>R</u> emove
Permissions for Everyone	Allow	Deny
Full Control		
Change Read		

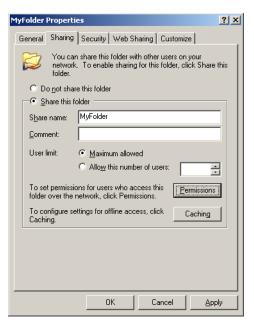
3 Select SHARE THIS FOLDER and click PERMISSIONS.

4 Select **EVERYONE** in the **GROUP OR USER NAMES** section, go to the **PERMISSIONS FOR EVERYONE** section, and select the **ALLOW** check box associated with the **FULL CONTROL** option.

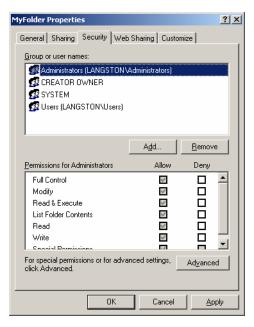
	<u>? ×</u>
Add	Remove
Allow	Deny
V	
\checkmark	
Cancel	Apply

Section 4: Sharing and security permissions

5 Click **APPLY** and click **OK**.



6 Click the **SECURITY** tab.



7 Click ADD.

Select Users, Computers, or Groups	<u>? ×</u>
Select this object type:	
Users, Groups, or Built-in security principals	Object Types
Erom this location:	
titania.omtool.com	Locations
Enter the object names to select (<u>examples</u>):	
	Check Names
Advanced	OK Cancel

8

Go to the **ENTER THE OBJECT NAMES TO SELECT** section, enter Everyone, click **CHECK NAMES**, verify that **EVERYONE** resolved, and click **OK**.

MyFolder Properties		<u>? ×</u>	
General Sharing Security Web	Sharing Custor	nize	
Group or user names:			
Administrators (LANGSTON\Administrators) CREATOR OWNER Everyone SYSTEM Users (LANGSTON\Users)			
	Add	<u>R</u> emove	
Permissions for Everyone	Allow	Deny	
Full Control Modify Read & Execute List Folder Contents Read Write			
For special permissions or for adva click Advanced.	inced settings,	Advanced	
OK	Cancel		

9 Select EVERYONE in the GROUP OR USER NAMES section, go to the PERMISSIONS FOR EVERYONE section, and click ADVANCED.

Advanced Security Settings for MyFolder							
F	Permissions Auditing Owner Effective Permissions						
	To view more information about special permissions, select a permission entry, and then click Edit.						
	Permissio	n entries:	,				
	Туре	Name	Permission	Inherited From	Apply To		
	Allow	Administrators (LANG	Full Control	<not inherited=""></not>	This folder only		
	Allow	Everyone	Read & Execute	<not inherited=""></not>	This folder, subfolders		
	Allow	Administrators (LANG	Full Control	Parent Object	This folder, subfolders		
	Allow	CREATOR OWNER	Full Control	Parent Object	Subfolders and files only		
	Allow	SYSTEM	Full Control	Parent Object	This folder, subfolders		
	Allow	Users (LANGSTON\	Special	Parent Object	This folder and subfol		
	Allow	Users (LANGSTON\	Read & Execute	Parent Object	This folder, subfolders		
		d Edit	1	1			
	Ad	a <u>E</u> ak	<u>R</u> emove				
	— Allau	inheritable permissions from	the parent to propa	anto to this object or	ad all abild abiasts. Include		
		with entries explicitly define		gate to this object an	ia ali chila objects. Include		
		That of alloc on plicing doning					
	🗌 Re <u>p</u> la	ce permission entries on all	child objects with en	tries shown here tha	at apply to child objects		
	Learn mo	re about access control.					
_							
				OK	Cancel Apply		
_							

10 Select **EVERYONE** in the **PERMISSIONS ENTRIES** list and click **EDIT**.

Permission Entry for MyFolder			? ×
Object			
Name: Everyone Apply onto: This folder, subfolders and	d files	<u>C</u> hange	
Permissions:	Allow	Deny	
Full Control Traverse Folder / Execute File List Folder / Read Data Read Attributes Create Files / Write Data Create Folders / Append Data Write Attributes Write Extended Attributes Delete Subfolders and Files Delete Read Permissions Character Solutions Apply these permissions to objects a			
	OK	Cance	el

Ρ

II Go to the **APPLY ONTO** drop-down menu and select **THIS FOLDER ONLY**.

ermission Entry for MyFolder		?	×
Object			1
Name: Everyone		<u>C</u> hange	
Apply onto: This folder only			
Permissions:	Allow	Deny	
Full Control Traverse Folder / Execute File List Folder / Read Data Read Attributes Read Extended Attributes Create Files / Write Data Create Folders / Append Data Write Attributes Write Extended Attributes Delete Subfolders and Files Delete Read Permissions Cheven Demissions to objects containers within this container only			
[OK	Cancel	

12 Go to the **PERMISSIONS** section and select the **ALLOW** check box associated with the **TRAVERSE** FOLDER/EXECUTE FILE, LIST FOLDER/READ DATA, READ ATTRIBUTES, and READ EXTENDED ATTRIBUTES options. (The permissions listed in this step are required. You can allow or deny other permissions as desired.)

Permission Entry for MyFolder		? ×
Object		
Name: Everyone		<u>C</u> hange
Apply onto: This folder only		•
Permissions:	Allow	Deny
Full Control Traverse Folder / Execute File List Folder / Read Data Read Attributes Read Extended Attributes Create Files / Write Data Create Folders / Append Data Write Attributes Write Extended Attributes Delete Subfolders and Files Delete Read Permissions Charae Demissions to objects a containers within this container only		
	OK	Cancel

Section 4: Sharing and security permissions

1

13 Click **OK** to close the Permission Entry for MyFolder dialog box.

٨d٧	Advanced Security Settings for MyFolder					
P	Permissions Auditing Owner Effective Permissions					
	To view more information about special permissions, select a permission entry, and then click Edit.					
				· - p		
	Permission	n en <u>t</u> ries:				
	Туре	Name	Permission	Inherited From	Apply To	
	Allow	Administrators (LANG	Full Control	<not inherited=""></not>	This folder only	
	Allow	Everyone	Special	<not inherited=""></not>	This folder only	
	Allow	Administrators (LANG	Full Control	Parent Object	This folder, subfolders	
	Allow	CREATOR OWNER	Full Control	Parent Object	Subfolders and files only	
	Allow	SYSTEM	Full Control	Parent Object	This folder, subfolders	
	Allow	Users (LANGSTON\	Special	Parent Object	This folder and subfol	
	Allow	Users (LANGSTON\	Read & Execute	Parent Object	This folder, subfolders	
	,	1				
	Ad	d <u>E</u> dit	<u>R</u> emove			
		inheritable permissions from		jate to this object ar	nd all child objects. Include	
	these	with entries explicitly define	d here.			
	E Baola	ce permission entries on all	child objects with en	tries shown here the	at apply to child objects	
	i ne <u>p</u> ia	ce permission entries on all	child objects with en	ules shown here the	a apply to child objects	
	Learn mor	re about <u>access control</u> .				
_				- or 1		
				<u> </u>	Cancel <u>A</u> pply	

14 Click APPLY and click OK to close the Advanced Security Settings for MyFolder dialog box.

MyFolder Properties		? ×
General Sharing Security Wet	Sharing Custom	ize
<u>G</u> roup or user names:		
Administrators (LANGSTON) Generations (LANGSTON)	Administrators)	
Everyone		
SYSTEM		
S Users (LANGSTON/Users)		
,	A <u>d</u> d	<u>R</u> emove
Permissions for Everyone	Allow	Deny
Full Control		
Modify Bead & Execute	H	
List Folder Contents	ä	
Read		
Write Special Remissions		
For special permissions or for adva	anced settings, 🦷	Advanced
click Advanced.		
OK	Cancel	Apply

15 Click **APPLY** and click **OK** to close the MyFolder Properties dialog box.

Continue to Second-level folder (domain or workgroup name).

Second-level folder (domain or workgroup name)

Using the following procedure, set the sharing and security permissions for MyFolder users on the second-level folder in the structure. This folder should be named after the domain or workgroup to which MyFolder users belong.

This procedure instructs you to give domain users or workgroup users sharing permissions with Full Control and special read/write security permissions that apply to this folder only. Omtool recommends that you include all domain users or workgroup users as documented in the following procedure. As an alternative to this method, however, you can add only the users or groups that use MyFolder.

Note Note: The image captures in the following procedure illustrate the sharing and security permissions for users in the domain TITANIA.

To set the sharing and security permissions on the second-level folder:

- I Go to second-level folder using Windows Explorer. Right-click the folder and select **PROPERTIES**.
- 2 Click the **SHARING** tab.

TITANIA Properties	? ×
General Sharing Security Web Sharing Customize	
You can share this folder with other users on your network. To enable sharing for this folder, click Share th folder.	nis
Do not share this folder	
C Share this folder	٦
S <u>h</u> are name:	
Comment:	
User limit: 🕟 Maximum allowed	
C Allow this number of users:	
To set permissions for users who access this folder over the network, click Permissions.	
To configure settings for offline access, click Caching	
OK Cancel Apply	

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Section 4: Sharing and security permissions

3

Permissions for TITANIA <u>?</u>× Share Permissions Group or user names: Everyone A<u>d</u>d... <u>R</u>emove Permissions for Everyone Allow Deny Full Control Change Read ΟK Cancel

Select the **SHARE THIS FOLDER** option and click **PERMISSIONS**.

4 Click ADD.

Select Users, Computers, or Groups	? ×
Select this object type:	
Users, Groups, or Built-in security principals	Object Types
Erom this location:	
titania.omtool.com	Locations
Enter the object names to select (<u>examples)</u> :	
	Check Names
Advanced	K. Cancel

5 Go to the ENTER THE OBJECT NAMES TO SELECT section, enter domain users (for a domain) or workgroup users (for a workgroup), click CHECK NAMES, verify that the account name is resolved, and click OK.

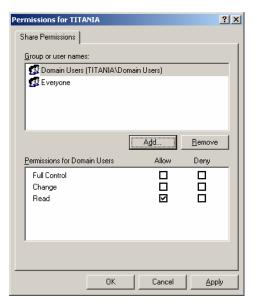
Permissions for TITANIA		? ×
Share Permissions		
Group or user names:	main Users)	
J <u>P</u> ermissions for Domain Users	Add	<u>R</u> emove Deny
Full Control Change Read		
OK	Cancel	

6 Select the domain users group or workgroup users group in the **GROUP OR USER NAMES** section, go to the **PERMISSIONS FOR <GROUP>** section, and select the **ALLOW** check box associated with the **FULL CONTROL** option.

Permissions for TITANIA		<u>? ×</u>
Share Permissions		
<u>G</u> roup or user names:		
🚮 Domain Users (TITANIA\Do	main Users)	
🕵 Everyone		
	A <u>d</u> d	<u>R</u> emove
Permissions for Domain Users	Allow	Deny
Full Control		
Change	\checkmark	
Read	\checkmark	
OK	Cancel	Apply

Section 4: Sharing and security permissions

7 Click **APPLY** and click **OK**.



8 Click the **SECURITY** tab.

TITANIA Properties		<u>?</u> ×
General Sharing Security Web	Sharing Custo	mize
<u>G</u> roup or user names:		
Administrators (LANGSTON)	Administrators)	
🕵 CREATOR OWNER		
SYSTEM		
🕵 Users (LANGSTON\Users)		
	A <u>d</u> d	<u>R</u> emove
Permissions for Administrators	Allow	Deny
Full Control	\checkmark	
Modify	>	
Read & Execute	1	
List Folder Contents	\checkmark	
Read	4	
Write Special Permissions	1	
For special permissions or for adva	nood oottingo	
click Advanced.	nceu settings, _	Advanced
OK	Cancel	Apply

© 2009 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

9 Click ADD.

Select Users, Computers, or Groups		<u>? x</u>
Select this object type:		
Users, Groups, or Built-in security principals		Object Types
Erom this location:		
titania.omtool.com		Locations
Enter the object names to select (examples):		
		<u>C</u> heck Names
Advanced	0K.	Cancel

10 Go to the ENTER THE OBJECT NAMES TO SELECT section, enter domain users (for a domain) or workgroup users (for a workgroup), click CHECK NAMES, verify that the account name is resolved, and click OK.

TITANIA Properties		<u>? ×</u>
General Sharing Security Web Shar	ing Custor	nize
Group or user names:		
Administrators (LANGSTON Admin	istrators)	
👧 CREATOR OWNER		
🚮 Domain Users (TITANIA\Domain U	Jsers)	
🕵 Everyone		
SYSTEM		
	\ <u>d</u> d	<u>R</u> emove
Permissions for Domain Users	Allow	Deny
Full Control		
Modify		
Read & Execute	\checkmark	
List Folder Contents		
Read		
Write Special Permissions	님	
For special permissions or for advanced click Advanced.	settings,	Advanced
OK	Cancel	Apply

Section 4: Sharing and security permissions

II Select the domain users group or workgroup users group in the **GROUP OR USER NAMES** section, go to the **PERMISSIONS FOR <GROUP>** section, and click **ADVANCED**.

Туре	Name	Permission	Inherited From	Apply To
Allow Allow	Domain Users (TITA	Read & Execute	<not inherited=""></not>	This folder, subfolders This folder only
Allow	Everyone Administrators (LANG	Special Full Control	<not innerited=""> Parent Object</not>	This folder, subfolders
Allow	CREATOR OWNER	Full Control	Parent Object Parent Object	Subfolders and files only
Allow	SYSTEM	Full Control	Parent Object	This folder, subfolders
Allow	Users (LANGSTON)	Special	Parent Object	This folder, subfolders
Allow	Users (LANGSTON \	Bead & Execute	Parent Object	This folder, subfolders
<u>A</u> llow these	inheritable permissions from with entries explicitly define the permission entries on all	ed here.		nd all child objects. Include at apply to child objects

12 Select the domain users group or workgroup users group in the **PERMISSIONS ENTRIES** list and click **EDIT**.

Permission Entry for TITANIA		? ×
Object	ain Users)	<u>C</u> hange
Apply onto: This folder, subfolders and	d files	•
Permissions:	Allow	Deny
Full Control Traverse Folder / Execute File List Folder / Read Data Read Attributes Read Extended Attributes Create Files / Write Data Create Folders / Append Data Write Attributes Write Extended Attributes Delete Subfolders and Files Delete Read Permissions Channe Deministrations Containers within this container only		
	OK	Cancel

I3 Go to the APPLY ONTO drop-down menu and select THIS FOLDER ONLY.

ermission Entry for TITANIA			? ×
Object	main Users)	<u>C</u> hange	
Apply onto: This folder only Permissions:	Allow	Deny	<u> </u>
Full Control Traverse Folder / Execute File List Folder / Read Data Read Attributes Read Extended Attributes Create Files / Write Data Create Folders / Append Data Write Attributes Write Extended Attributes Delete Subfolders and Files Delete Read Permissions Character Swithmith the container on Containers within the container on			
	OK	Canc	el

14 Go to the PERMISSIONS section and select the ALLOW check box associated with the TRAVERSE FOLDER/EXECUTE FILE, LIST FOLDER/READ DATA, CREATE FOLDERS/APPEND DATA, and READ PERMISSIONS options. (The permissions listed in this step are required. You can allow or deny other permissions as desired.)

Permission Entry for TITANIA		? ×
Object <u>N</u> ame: Domain Users (TITANIA\Dom	nain Users)	<u>C</u> hange
Apply onto: This folder only		•
Permissions:	Allow	Deny
Full Control Traverse Folder / Execute File List Folder / Read Data Read Attributes Read Extended Attributes Create Files / Write Data Create Files / Write Data Write Attributes Write Extended Attributes Delete Subfolders and Files Delete Read Permissions Containers within this container only		
[OK	Cancel

Section 4: Sharing and security permissions

15 Click **OK** to close the Permission Entry for the dialog box.

Advanced Security Settings for TITANIA	<u>? ×</u>				
Permissions Auditing Owner Effective Permissions					
To view more information about special permissions, select a permission entry, and then click Edit.					
To non-more more that a book operation permission of a permission of any, and then block bak					
Permission entries:					
	Apply To				
Allow Domain Users (TITA Special <not inherited=""></not>	This folder only				
Allow Everyone Special <not inherited=""></not>	This folder only				
Allow Administrators (LANG Full Control Parent Object	This folder, subfolders				
Allow CREATOR OWNER Full Control Parent Object	Subfolders and files only				
Allow SYSTEM Full Control Parent Object	This folder, subfolders				
Allow Users (LANGSTON\ Special Parent Object	This folder and subfol				
Allow Users (LANGSTON\ Read & Execute Parent Object	This folder, subfolders				
Add <u>E</u> dit <u>R</u> emove					
Allow inheritable permissions from the parent to propagate to this object and these with entries explicitly defined here.	all child objects. Include				
these with entities explicitly defined here.					
Replace permission entries on all child objects with entries shown here that a	apply to child objects				
Low was should accounted					
Learn more about access control.					
ОК	Cancel Apply				

16 Click APPLY and click OK to close the Advanced Security Settings for the dialog box.

ITANIA Propertie	5		? ×
General Sharing	Security Web	Sharing Custo	mize
<u>G</u> roup or user nar		·	
CREATOR I CREATOR I Domain Use Creyone	rs (LANGSTON\ DWNER rs (TITANIA\Dor		
SYSTEM			
<u> </u>		A <u>d</u> d	<u>R</u> emove
Permissions for D	omain Users	Allow	Deny
Full Control Modify Read & Execut List Folder Con Read Write For special Permis For special permis	tents	nced settings,	
	<u>ОК</u>		

17 Click **APPLY** and click **OK** to close the Properties dialog box.

Repeat this procedure for each second-level folder that represents a domain or workgroup.

Continue to Setting the required permissions for the Omtool server Windows account.

Setting the required permissions for the Omtool server Windows account

Using the following procedure, set the sharing and security permissions for the Omtool server Windows account. These permissions are set on the top-level folder, and apply to all subfolders in the structure.

To set the sharing and security permissions on the top-level folder:

- I Go to the top-level folder using Windows Explorer. Right-click the folder and select **PROPERTIES**.
- 2 Click the **SHARING** tab.

MyFolder Properties				
General Sharing Security Web Sharing Customize				
You can share this folder with other users on your network. To enable sharing for this folder, click Share this folder.				
C Do not share this folder				
Share this folder				
S <u>h</u> are name: MyFolder 🔽				
Comment:				
User limit:				
C Allow this number of users:				
To set permissions for users who access this folder over the network, click Permissions.				
To configure settings for offline access, click Caching Caching				
New Share				
OK Cancel Apply				

3 Click **PERMISSIONS**.

	<u>? ×</u>
main Users)	
Add Allow V	Bemove
T careed	
	Add Allow V

4 Click ADD.

Select Users, Computers, or Groups	? ×
Select this object type:	
Users, Groups, or Built-in security principals	Object Types
Erom this location:	
titania.omtool.com	Locations
Enter the object names to select (<u>examples</u>):	
	Check Names
Advanced	Cancel

5 Go to the ENTER THE OBJECT NAMES TO SELECT section, enter the name of the Omtool server Windows account, click CHECK NAMES, verify that the account name is resolved, and click OK.

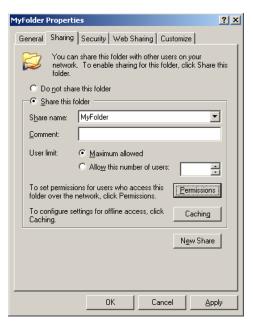
Permissions for MyFolder		? ×
Share Permissions		
Group or user names:		
🕵 Domain Users (TITANIA\I	Domain Users)	
Everyone	oolServerAdmin@titania.omtool.co	
	Add <u>R</u> emove	
Permissions for OmtoolServerAdmin	Allow Deny	-
Full Control		
Change		
Read		
		- 1
OK	Cancel Appl	<i>y</i>

6 Select the Omtool server account in the GROUP OR USER NAMES section, go to the PERMISSIONS FOR <OMTOOL SERVER ACCOUNT> section, and select the ALLOW check box associated with the FULL CONTROL option.

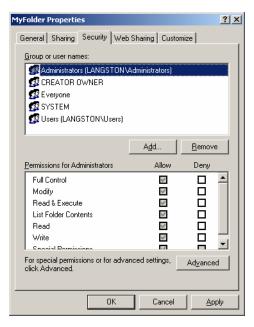
Permissions for MyFolder		? ×
Share Permissions		
<u>G</u> roup or user names:		
Domain Users (TITANIA\Do 2 3 2 3	main Users)	
OmtoolServerAdmin (Omtool!	GerverAdmin@tita	nia.omtool.co
J		
Permissions for	A <u>d</u> d	<u>R</u> emove
ÖmtoolServerAdmin	Allow	Deny
Full Control		
Change		
Read		
OK	Cancel	Apply

Section 4: Sharing and security permissions

7 Click **APPLY** and click **OK**.



8 Click the **SECURITY** tab.



9 Click ADD.

Select Users, Computers, or Groups		? ×
Select this object type:		
Users, Groups, or Built-in security principals		Object Types
Erom this location:		
titania.omtool.com		Locations
Enter the object names to select (examples):		
		Check Names
Advanced	OK.	Cancel

10 Go to the **ENTER THE OBJECT NAMES TO SELECT** section, type the name of the Omtool server Windows account, click **CHECK NAMES**, verify that the account name is resolved, and click **OK**.

MyFolder Properties			? ×
General Sharing Sec	urity Web Sha	aring Custom	ize
Group or user names:		inistrators)	-
Everyone		erAdmin@titan	ia.omtool.ci
SYSTEM			▼ ▶
<u>P</u> ermissions for OmtoolServerAdmin		Add	<u>R</u> emove Deny
Full Control Modify Read & Execute List Folder Contents Read Write			
For special permissions click Advanced.	or for advance	d settings,	Advanced
	ОК	Cancel	Apply

II Select the Omtool server account in the GROUP OR USER NAMES section, go to the PERMISSIONS FOR EVERYONE section, and select the ALLOW check box associated with the FULL CONTROL option.

MyFolder Properties		<u>? ×</u>
General Sharing Security Web	Sharing Custo	mize
<u>G</u> roup or user names:		
Administrators (LANGSTON)	Administrators)	_
Everyone OmtoolServerAdmin (OmtoolS	ConverAdmin@tite	
	oerveiAumin@uta	
	A <u>d</u> d	<u>R</u> emove
Permissions for OmtoolServerAdmin	Allow	Deny
Full Control		
Modify Bead & Execute	N N	
List Folder Contents		
Read		
Write		
Coosial Parmissions		
For special permissions or for adva click Advanced.	inced settings,	Advanced
OK	Cancel	Apply

12 Click **APPLY** and click **OK** to close the MyFolder Properties dialog box.

Section 5: Required server configuration

This section includes:

Enabling MyFolder as a recipient type in AccuRoute Desktop (5-1)

Enabling MyFolder as a recipient type in AccuRoute Desktop

If you have added support for MyFolder 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 MyFolder as a recipient type in AccuRoute Desktop

- I 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 MyFolder.
- 5 Click **OK** to save your changes.

Now when you start AccuRoute Desktop, MyFolder 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.

5-2 ____

Section 5: Required server configuration

Section 6: Optional server configuration

This section includes:

Changing the label of a document (6-1)

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.

Тір	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

- I 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.

Properties for User			×
General AccuRoute	Approval FaxCent	er Web Client	1
🔽 Override default Ac	ccuRoute settings		
🔽 Enable use of t	ne AccuRoute client		
Allow user to route	to		
E. Type		Connector 🔺	Configure
E-mail			
Fax Printer			
		Billing _	
Options			
·	q of all Embedded Di	octives	
	uthenticated access t		
View Columns			
Recipients: Ty	oe, Destination, Docu	ment Format	Configure
Open/Save: Ow	ner, Title, Created, L	ast Used, Single Us	
Billing			
Validate/Loc	akun uisi		
	лар иа. ј		
	OK	Cancel	Help

Section 6: Optional server configuration

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

Routing Des	tination I inal Forms			X
	h final forn	'	client can send to this	
Enabled	Default	File Extension	Description	
		G4.TIF	TIFF (image)	
		PDF	PDF (image)	
		OCR.PDF	PDF (image+OCR text)	
N N N N N N N		OCR.DOC	DOC (OCR text)	
		OCR.RTF	RTF (OCR text)	
		OCR.TXT	TXT (OCR text)	
				- 11
				- 11
•				Þ
				- 1
		Set	as Default Propertie	s
			OK Cano	el

6 Click **PROPERTIES**.

7 Enter the new label for this document type in the **DESCRIPTION** field.

	×
	Reset
ОК	Cancel
	OK

- 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 7: Client configuration

This section includes:

Configuring AccuRoute Desktop (7-1) Client deployment methods (7-1)

Configuring AccuRoute Desktop

To add MyFolder functionality to AccuRoute Desktop:

- I Start AccuRoute Desktop and log in.
- 2 Click **TOOLS** on the menu bar and select **CONFIGURE DMS**.
- 3 Select **MyFolder** from the menu that appears. The MyFolder Location window appears.

At this point, the configuration is identical to that of the connector configuration. Perform steps one through four in <u>Configuring a new MyFolder connector</u> (3-6).

Continue to Client deployment methods.

Client deployment methods

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

- Configure AccuRoute Desktop to support MyFolder 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 <u>Configuring MyFolder for client</u><u>rollout</u>.
- Install AccuRoute Desktop on each individual workstation and perform the configuration steps for MyFolder manually. Continue to <u>Configuring MyFolder manually</u>.

Configuring MyFolder 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 MyFolder manually after you install AccuRoute Desktop.

To pre-configure the Omtool DMS Libraries for deployment:

- I Install AccuRoute Desktop v2.2 or higher on a workstation.
- 2 Configure the Omtool DMS Libraries to support MyFolder. 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 MyFolder. When you are ready to deploy MyFolder, launch setup.exe in the AccuRoute Desktop directory.

Configuring MyFolder manually

To configure MyFolder manually:

AccuRoute Desktop - (Go to <u>Configuring AccuRoute Desktop</u> on 7-1.) Follow these steps on all AccuRoute Desktop workstations.

Section 8: Testing

To test the installation and configuration of Omtool DMS Libraries v2.3 for MyFolder, send a message using AccuRoute Desktop. For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to <u>Related documentation</u> on I-3.

To send a message to MyFolder using AccuRoute Desktop:

I 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.

Untitled - AccuRoute		×
File Edit View Tools H	elp Save ED View R	15 📓 Print R5 🖃 Send 🖹 Options 🙆
	Take CD	15 🛃 Print R.5 🖬 Send 🖹 Options 🙆
Recipients Type	Format:	Enter e-mail address
E-mail	DOC (OCR text)	
Fax	PDF (image)	
MyFolder Printer	PDF (image+OCR text) RTF (OCR text)	Add E_mail copy to jdoe@engineering.omtool.com
T III KGI	TIFF (image) TXT (OCR text)	
Туре	Destination	n Document Format
		<u></u>
•		
🔲 <u>B</u> illing		List of recipients
Content		List of recipients
Subject:		
Comments:		A
Attachments:	ted document(s) here	01
	ed document(a) here	
		×
		jdoe@engineering.omtool.com VMJKAR21NEW

2 Select the destination type **MYFOLDER** 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.

For information on using billing, consult the AccuRoute Desktop User Guide or your system administrator.

Section 8: Testing

- Untitled AccuRo _ 🗆 × 🚰 Open ED 🛛 📓 Save ED 🔹 View RS Print R5 Dotions 🗋 <u>N</u>ew ecipients Type Format: DOC (OCR text) Press Add to profile document ٥ E-mail - M 🖬 MyFol Fax MyFolder Printer ? × ring.omtool.com Save in: 🔄 Administrator - - - -Туре r I \times <u>∏</u> <u>B</u>illing 100 Conten File name Save S<u>u</u>bject: Cancel Adobe Files (*.pdf) -Save as type Comments . Multiple use options: Create new document • -Attachments: Submitted document(s) here 0 \times jdoe@engineering.omtool.com VMJKAR21NEW
- 3 Click **ADD**. The MyFolder window appears.

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

Note that the **SAVE AS TYPE** defaults to match the document format you selected in Step 2. Do not make any changes to this option.

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

Untitled - Ad	cuRoute Desktop					_ 🗆 ×
File Edit View	Tools Help					
] 🗋 <u>N</u> ew 🞑	Open ED Save ED	Vie <u>w</u> RS	🛃 Erint R.S 📗 🖬	ISend) Op <u>t</u> ions 🛛 🥝	
Recipients Type E-mail Fax MyFolder Printer Type	Format: DOC (OCF Save in: 🖼 Admin		Press Add to prol	file docume <u>n</u>	? ×	eering omtool.com
Content Sybject: Comments: Attachment <u>s</u> :	File name: Save as type: Multiple use options:	Create new do	pdf) cument sument nal document	Y	Save Cancel	
				jdoe@	engineering.omto	ol.com VMJKAR21NEW

CREATE NEW DOCUMENT. Selecting this option creates a new document in MyFolder. 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 MyFolder window.

\\VMJKAR21NEW\MyFolder\Engineering\Administrator\ProductMemorandum.pdf already exists. Do you want to replace it?
Yes No

8-2

OVERWRITE ORIGINAL 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 MyFolder window.

\\VMJKAR21NEW\MyFolder\Engineering\Administrator\ProductMemorandum.pdf already exists. Do you want to replace it?	
Yes No	

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 MyFolder window.

1	\\VMJKAR21NEW\MyFolder\Engineering\Administrator\ProductMemorandum.pdf alread exists. Do you want to replace it?			ProductMemorandum.pdf already
		Yes	No	l

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

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

Untitled - AccuRoute Desktop		
File Edit View Tools Help		
📄 New 🛛 🚰 Open ED 🛛 🚽 Save ED	View RS 🚽 Print RS 🗐 🗐 Sen	d 📄 Optjions 📔 🎯
Recipients Type Format:	Press Add to profile do	
E PDF fim	age+OCR text) CR text) Lage)	E _t mail copy to jdoe@engineering.omtool.com
Туре	Destination	Document Format
MyFolder ∢	\\VMJKAR21NE\w\MyFolder\ENGIN.	. PDF (image+OCR text)
□ <u>B</u> illing		00
Content		
S <u>u</u> bject:		
Co <u>m</u> ments:		
Attachments: Submitted document(s) here	
		jdoe@engineering.omtool.com VMJKAR21NEW

6 Click SAVE. A MyFolder destination appears in the message.

8-4

- 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**.

Untitled - AccuRoute Desktop				
File Edit View	File Edit View Tools Help			
] 🗋 <u>N</u> ew 🛛	🖓 Open ED 🛛 🚽 Save ED 🔰 🛕 Vie <u>w</u> RS 🕞 Print RS	ESgnd Dotions		
Recipients Type E-mail Fax MyFolder Printer	DOC (OCR text) PDF (image) PDF (image+0CR text) RTF (OCR text) TIFF (image)	to profile document		
Type	TXT (OCR text) Destination \\\VMJKAR21NEW\MyFol	Document Format		
Content				
Subject:	Subject			
Co <u>m</u> ments:		×		
Attachment <u>s</u> :	Submitted document(s) here TestDocument.doc			
		jdoe@engineering.omtool.com VMJKAR21NEW		

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.)

Section 9: Troubleshooting

This section includes:

Detecting workflow issues (9-1)

Troubleshooting the message on the Omtool server (9-1)

Troubleshooting the multifunction device (9-3)

Troubleshooting the client (9-3)

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

Detecting workflow issues

After a document has been profiled to MyFolder, 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 MyFolder, 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.

To locate the message on the Omtool server:

- I 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.

R	Recipient Properties			
	G	ieneral Attachments R	scipient Sender Continnations Journal	
	Г	Date	Jaurnal Entry	
	ľ	10/05/2005 09:32:57 AM	Dispatch: Fax number normalized to +16038901	
		10/05/2005 09:32:57 AM 10/05/2005 09:32:57 AM	Dispatch: Matched rule Al lax numbers to Telco Dispatch: Processing action for rule "All fax num	
		10/05/2005 09:32:58 AM	Compose Started	
		10/05/2005 09:32:58 AM	Compose: (localhost - localhost) Document-cert	

- 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**.

÷

View	Items submitted this week 🖉 💌
	Al Items
	Items submitted today 🛛 🖓
	Items submitted yesterday
	Items submitted this week
	Items submitted this month

- 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.

ccipient Properties General Attachments Ro	xcipient Sender Conlimations Journal
Date	Journal Entry
10/05/2005 09:32:57 AM 10/05/2005 09:32:57 AM 10/05/2005 09:32:57 AM 10/05/2005 09:32:57 AM 10/05/2005 09:32:58 AM 10/05/2005 09:33:27 AM 10/05/2005 09:33:22 AM 10/05/2005 09:33:22 AM	Dispatch: Fax number normalized to +16036901 Dispatch: Matched rule AI lax numbers to Telco Dispatch: Processing action for rule "All fax num Compose Statted Compose (locahost - localhost) Documente-ent Compose (locahost - localhost) Documente-ent Compose (locahost - localhost) Documente-ent Compose (construct - localhost) Documente-ent Compose Complete OntooConnector: Destination connector failed 1 Dispatch: Fax number normalized to +16038901 Dispatch: Routing complete

If the message failed, correct the issue and send the message again. Contact Omtool if you are unable to resolve the issue. (Go to <u>Customer service and technical support</u> 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 MyFolder successfully. Do some advanced troubleshooting on MyFolder to determine why the message is not being delivered to its destination. Contact Omtool if you are unable to resolve the issue. (Go to <u>Customer service</u> 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 MyFolder. If you are able to send messages to recipients other than MyFolder and MyFolder is operating correctly, contact Omtool. (Go to <u>Customer service and technical support</u> on the inside front cover.)

9-4 ____

Section 9: Troubleshooting