
Omtool DMS Libraries v2.3 installation and integration guide for SharePoint®

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Section I: Introduction

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

This section includes:

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

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

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

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

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

Omtool DMS Libraries integration with SharePoint

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

Using Omtool DMS Libraries v2.3, you can be sure all of your important documents are stored in SharePoint. The combined power of AccuRoute Desktop (V2.2 or higher) and Omtool DMS Libraries v2.3 for SharePoint allows your users to send both soft copy and hard copy documents to SharePoint quickly and easily.

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

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

Installation components

Omtool DMS Libraries v2.3 is included in the AccuRoute v2.3 installation. If you have AccuRoute v2.1, you 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 SharePoint:

- 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 SharePoint. (Go to [Section 7: Testing](#).)
- 6 Troubleshoot the installation. (Go to [Section 8: Troubleshooting](#).)

Release notes

Enhancements

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

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

Resolutions

Omtool DMS Libraries v2.3 for SharePoint includes the following resolved issues.

- Updated Omtool DMS Library files were not included in the AccuRoute Desktop installation directory. As a result, files had to be manually installed on every workstation.

- When trying to route jobs to the SharePoint connector the following error appeared: “Failure 80010105 an unanticipated error has occurred” and the following error sometimes appeared in the Journal: “Remote procedure call failed 0x800706be.” See Knowledge Base Article K04083. (Go to [Online resources](#) on the inside front cover.)

Limitations

Omtool DMS Libraries v2.3 for SharePoint includes the following limitation:

Acrobat PDF icon does not display when importing to SharePoint: When you import a PDF document into SharePoint, the Acrobat PDF icon does not display.

Microsoft did not include a PDF icon with SharePoint.

To add the icon, place the PDF icon named “icpdf.gif” into C:\Program Files\Common Files\Microsoft Shared\web server extensions\60\TEMPLATE\IMAGES, or wherever this directory is on your server. You can do the same with any other file type that does not have an icon.

In addition to placing the icpdf.gif in the ...TEMPLATE\IMAGES directory, you also need to map the extension to the icon in ...TEMPLATE\XML\docicon.xml by adding the map for pdf. See the Microsoft Knowledge Base Article on the ByExtension Element for steps on performing this mapping located at http://msdn.microsoft.com/library/default.asp?url=/library/en-us/spsdk11/CAML_Schema/spxml/ByExtension.asp.

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 SharePoint using AccuRoute Desktop - <http://www.omtool.com/documentation/dmslibraries/v23/SharePoint/OmtoolDMSLibrariesV23SharePointQuickStartGuide.pdf>
- Administrator help - <http://www.omtool.com/documentation/omtoolserver/v36/admin/index.htm>

Section 2: Requirements

This section includes:

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

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

[Supported SharePoint versions](#) (2-2)

Server requirements

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

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

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

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

- Tier 2 DMS connector license
- A SharePoint portal must be available to the DMS connector for SharePoint

Client requirements

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

- AccuRoute Desktop v2.2 or higher

Supported SharePoint versions

- Permissions to access a Microsoft SharePoint 2003 portal. SharePoint is a shared document repository.

Section 3: Installation

This section includes:

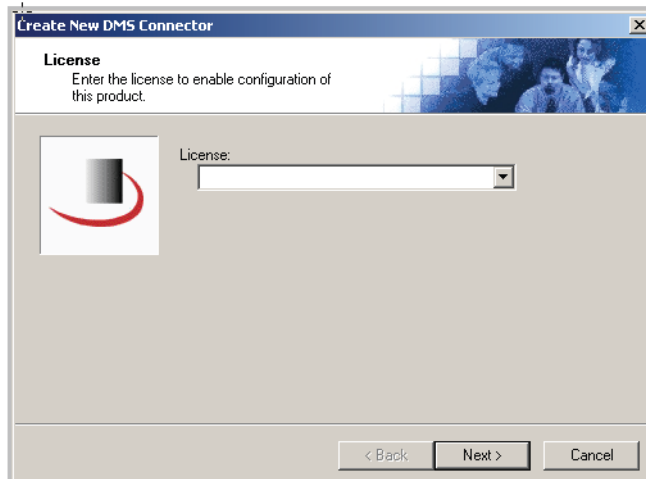
[Adding the SharePoint connector](#) (3-1)

[Completing the SharePoint connector configuration wizard](#) (3-3)

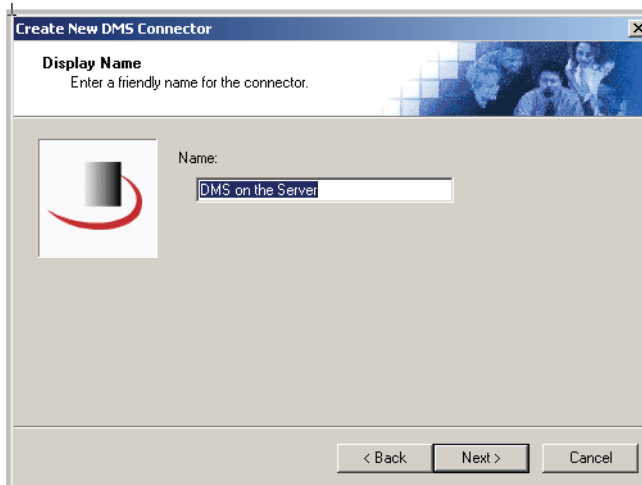
Adding the SharePoint connector

To add the SharePoint connector to an AccuRoute server:

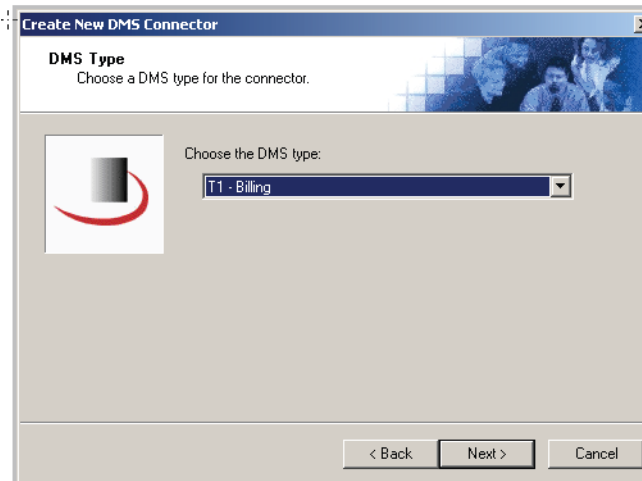
- I Right-click **CONNECTORS** in the console tree and select **NEW > DMS**. The License window appears.



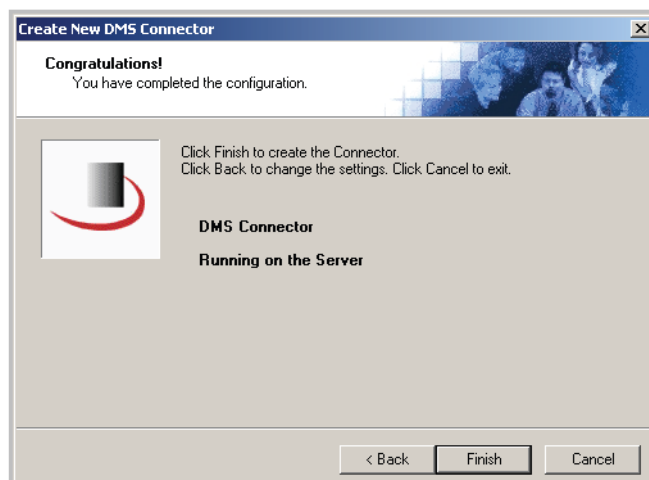
- 2 Type the license key for the SharePoint connector in the **LICENSE** text box and click **NEXT**. The Display Name window appears.



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



- 4 Select **T2 - SHAREPOINT** 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 SharePoint.

Continue to [Completing the SharePoint connector configuration wizard](#).

Completing the SharePoint connector configuration wizard

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

[Configuring a new SharePoint connector](#) (3-4)

[Configuring an existing SharePoint connector](#) (3-5)

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

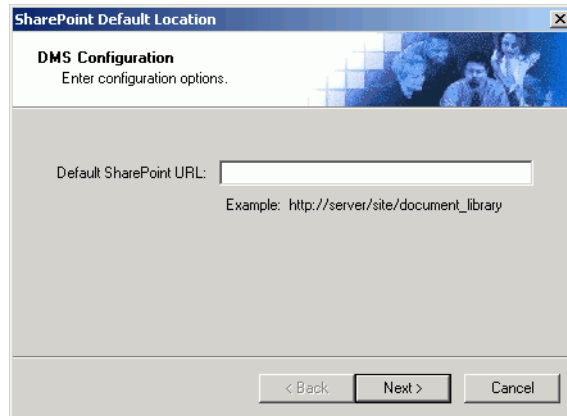
When multiple Omtool applications are installed on the same system, these applications share the same DMS configuration data. If you make changes to the DMS configuration settings for one Omtool application, those changes affect all Omtool applications installed on the system.

Configuring a new SharePoint connector

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

Figure 3-A: SharePoint Default Location window

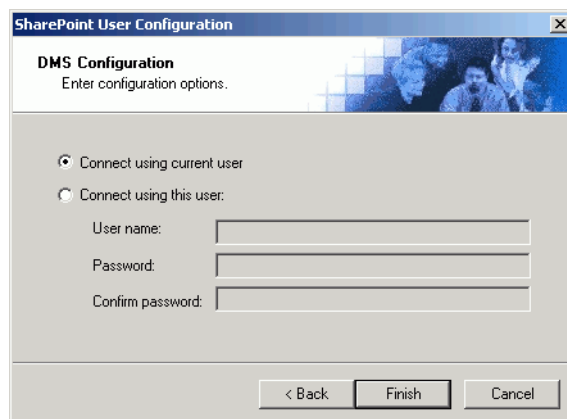
Enter the SharePoint URL on this window.



The screenshot shows a window titled "SharePoint Default Location" with a close button (X) in the top right corner. The window has a header bar with the text "DMS Configuration" and "Enter configuration options." Below the header, there is a text input field labeled "Default SharePoint URL:". Below the input field, there is an example URL: "Example: http://server/site/document_library". At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel".

To complete the configuration wizard for a new SharePoint connector:

- 1 Enter the URL to your SharePoint repository in the **DEFAULT SHAREPOINT URL** text box.
- 2 Click **NEXT**. The SharePoint User Configuration window appears.



The screenshot shows a window titled "SharePoint User Configuration" with a close button (X) in the top right corner. The window has a header bar with the text "DMS Configuration" and "Enter configuration options." Below the header, there are two radio button options: "Connect using current user" (which is selected) and "Connect using this user:". Below the "Connect using this user:" option, there are three text input fields: "User name:", "Password:", and "Confirm password:". At the bottom of the window, there are three buttons: "< Back", "Finish", and "Cancel".

3 Select an authentication method:

CONNECT USING CURRENT USER - Select this option to connect to SharePoint 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 SharePoint 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 configure the AccuRoute server with the login credentials of Windows user account that has Windows sharing and security permissions to read and write to SharePoint. 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**.

After you complete the DMS configuration wizard, the SharePoint connector appears in the Connectors details pane.

Configuring an existing SharePoint connector

To complete the configuration wizard for an existing SharePoint connector:

- 1** Click **CONNECTORS** in the console tree, and double-click the **SHAREPOINT** connector in the details pane.
- 2** Click the **ADVANCED** tab.
- 3** Locate the **DMS CONFIGURATION** section, and click **CONFIGURE**. The SharePoint Default Location window appears.
- 4** Perform steps one through four in [Configuring a new SharePoint connector](#) (3-4).

Section 4: Required server configuration

This section includes:

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

Enabling SharePoint as a recipient type in AccuRoute Desktop

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

- 1 Click **REGISTERED USERS** in the console tree and double-click an individual user in the details pane, or right-click **REGISTERED USERS** in the console tree and select **USER DEFAULTS**.
- 2 Click the **ACCURROUTE** tab.
- 3 Select **ENABLE USE OF THE ACCURROUTE CLIENT**.
- 4 Locate **ALLOW USER TO ROUTE TO LIST** and select **SharePoint**.
- 5 Click **OK** to save your changes.

Now when you start AccuRoute Desktop, SharePoint is available.

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

Section 4: Required server configuration

Section 5: Optional server configuration

This section includes:

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

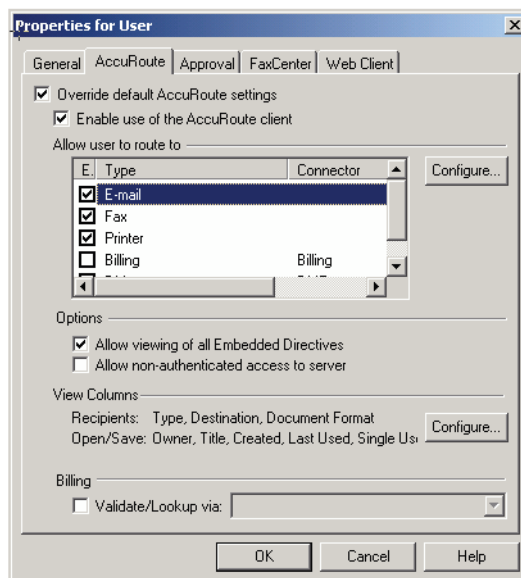
Changing the label of a document

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

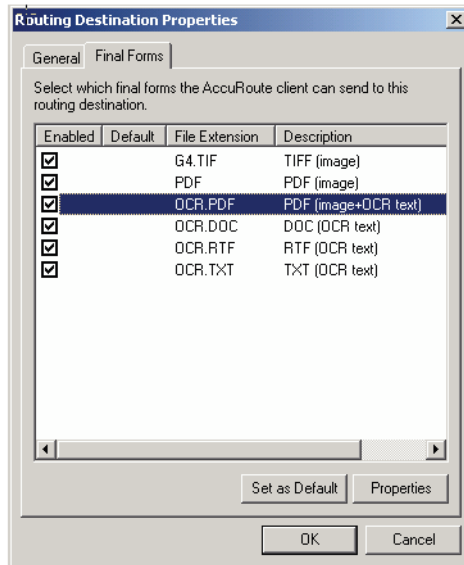
Tip If any individual users are registered on the AccuRoute server, complete this procedure once to modify user defaults and once for each individual user.

To change the label of a document type

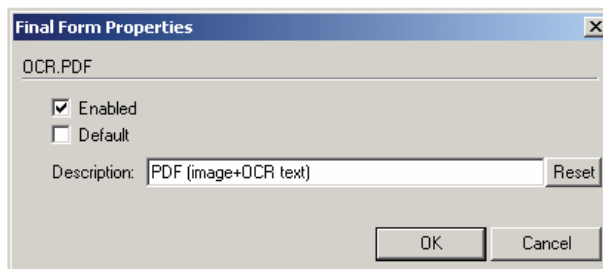
- 1 Click **REGISTERED USERS** in the console tree and double-click an individual user in the details pane, or right-click **REGISTERED USERS** in the console tree and select **USER DEFAULTS**.
- 2 Click the **ACCURROUTE** tab.
- 3 Highlight an item in the **ALLOW USER TO ROUTE TO** list.



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



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



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

Section 6: Client configuration

This section includes:

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

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

Configuring AccuRoute Desktop

To add SharePoint functionality to the AccuRoute Desktop:

- 1 Start AccuRoute Desktop and log in.
- 2 Click **TOOLS** on the menu bar and select **CONFIGURE DMS**.
- 3 Select **SHAREPOINT** from the menu that appears. The SharePoint 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 SharePoint connector](#) (3-4).

Continue to [Client deployment methods](#).

Client deployment methods

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

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

Configuring SharePoint 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 SharePoint 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 SharePoint. 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 SharePoint. When you are ready to deploy SharePoint, launch setup.exe in the AccuRouteDesktop2.2 directory.

Configuring SharePoint manually

To configure SharePoint manually:

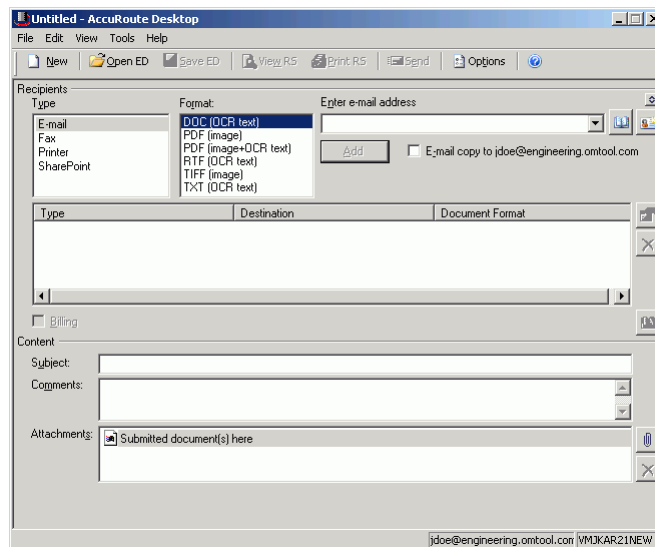
AccuRoute Desktop - (Go to [Configuring AccuRoute Desktop](#) on 6-1.) Follow these steps on all AccuRoute Desktop workstations.

Section 7: Testing

To test the installation and configuration of Omtool DMS Libraries v2.3 for SharePoint, send a message using AccuRoute Desktop. For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to [Related documentation](#) on I-3.

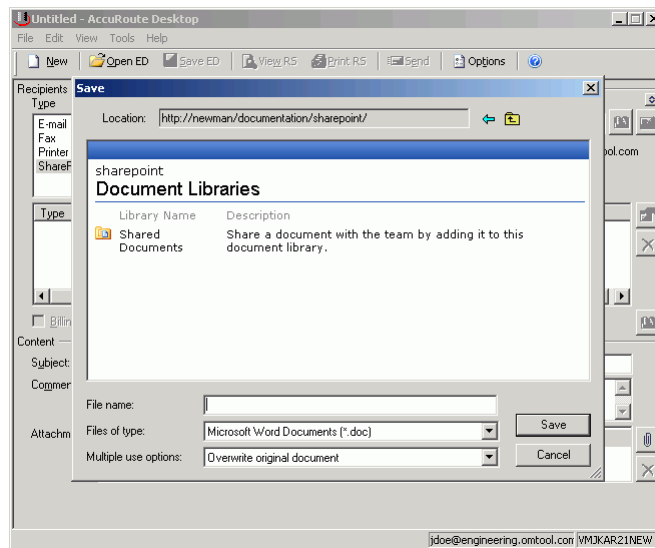
To send a message to SharePoint using AccuRoute Desktop:

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

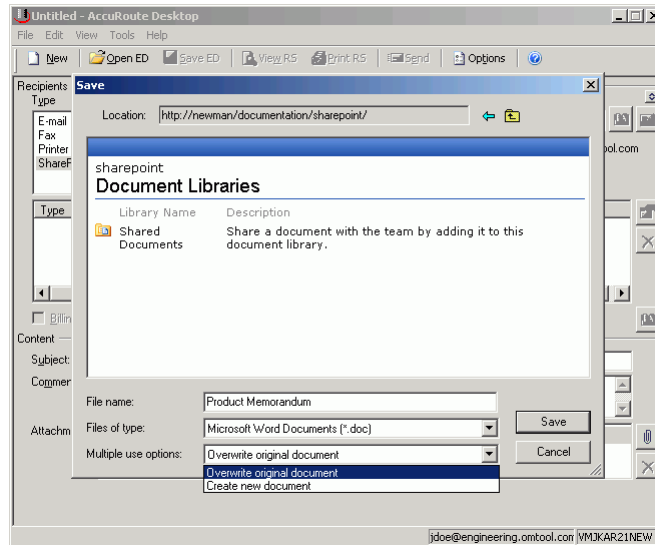


- 2 Select the destination type **SHAREPOINT** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.
For more information on the available file formats, consult the AccuRoute Desktop User Guide.

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



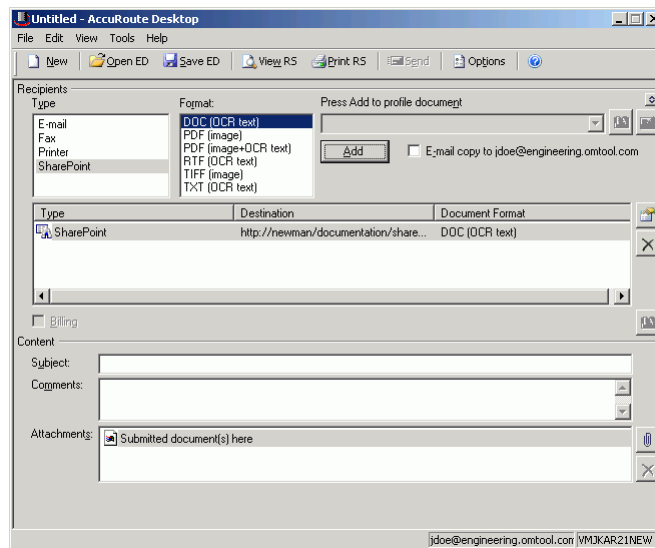
- 4 In the **FILE NAME** text box, enter the file name you wish to assign to your document.
The **FILES OF TYPE** option defaults to match the document format you selected in Step 2. Do not make any changes to this option.
- 5 From the **MULTIPLE USE OPTIONS** drop-down list, select one of the following:



CREATE NEW DOCUMENT - Selecting this option creates a new document in SharePoint. If you select this option and the file name already exists, the date and time are appended to the file name. The original document is retained.

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 SharePoint window.

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

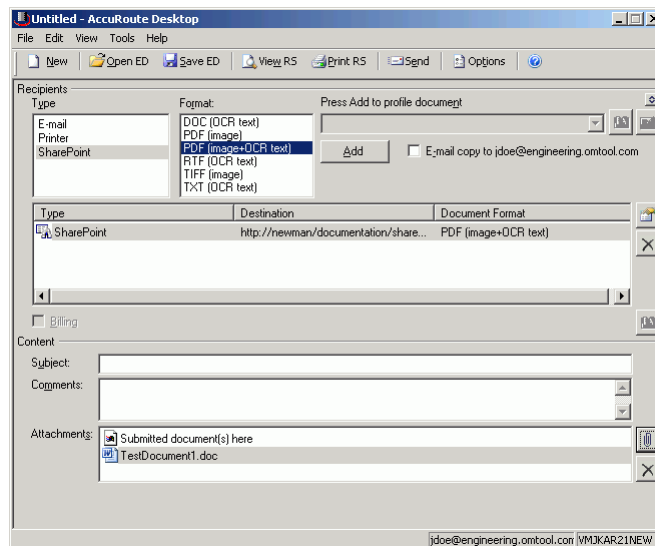


7 Add content to your message.

- 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.)

Section 8: Troubleshooting

This section includes:

[Detecting workflow issues](#) (8-1)

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

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

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

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

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

Detecting workflow issues

After a document has been profiled to SharePoint, 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 SharePoint, and then continues to the Omtool server, the device (if applicable), and then the client.

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

Troubleshooting the delivery mechanism

When the Omtool server finishes processing a message, an outbound connector routes the message directly to its destination or passes the message to SharePoint. Do some basic troubleshooting on SharePoint. If SharePoint is functioning correctly, troubleshoot the message on the Omtool server.

For information on troubleshooting SharePoint, consult SharePoint's documentation.

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

Troubleshooting the message on the Omtool server

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

- Was the message submitted to the Omtool server?
- Assuming the message was submitted to the Omtool server, what caused the delivery failure? The state and status of the message, along with details in the message journal, provide some important clues.

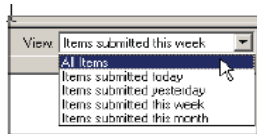
Start troubleshooting by trying to locate the message on the Omtool server.

To locate the message on the Omtool server:

- 1 Start the Administrator.
- 2 Go to **OMTOOL SERVER ADMINISTRATOR > [SERVERNAME] > MESSAGES.**
- 3 Look for the message in the In Process queue:

a Click **IN PROCESS.**

b View **ALL ITEMS.**



c Sort all items by the date submitted.

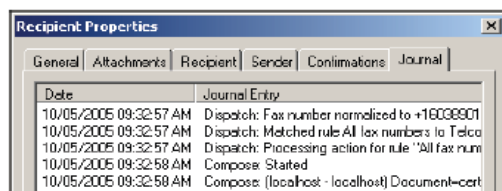
d Look for the message.

- **Message found** - Double-click the message and then click the **JOURNAL** tab to view the message journal to determine the current state and status of the message. Then monitor the components and confirm that the message is moving through the processing queues on the Omtool server. If the

Omtool server stops processing the message (for example, the message seems to be stuck in a processing queue), restart all the Omtool services.

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

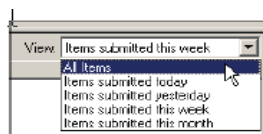
Also, check the Event Viewer for any information that might help troubleshoot the issue.



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

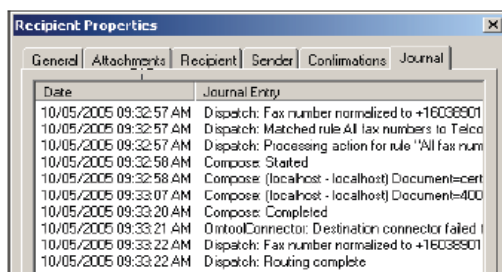
4 Look for the message in the History queue:

- a Click **HISTORY**. The message could be in either the Successful barometer or the General Failure barometer.
- b View **ALL ITEMS**.



- c Sort all items by the date submitted.
- d Look for the message.

- **Message found** - Double-click the message and then click the **JOURNAL** tab to view the message journal to determine the cause of the failure.



If the message failed, correct the issue and send the message again. Contact Omtool if you are unable to resolve the issue. (Go to [Customer service and technical support](#) on the inside front cover.)

If the journal states that Omtool server delivered the message but it still has not arrived at its destination, this indicates that the Omtool server transferred the message to SharePoint successfully. Do some advanced troubleshooting on SharePoint to determine why the message is not being

delivered to its destination. Contact Omtool if you are unable to resolve the issue. (Go to [Customer service and technical support](#) on the inside front cover.)

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

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

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

Troubleshooting the multifunction device

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

Continue to [Troubleshooting the client](#).

Troubleshooting the client

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