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

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Section 1: Introduction

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

This section includes:

TRIM Context (1-1)
Installation components (1-1)
Deployment summary (1-2)
Release notes (1-2)
Related documentation (1-3)

TRIM Context

Omtool DMS Libraries v2.3 includes the ability to integrate to TRIM Context. Using this ability, you can profile all of your important documents and store them in TRIM Context.

The combined power of AccuRoute Desktop v2.2.3 and Omtool DMS Libraries v2.3 for TRIM Context allows users to route both soft copy and hard copy documents to TRIM Context quickly and easily. Best of all, there is no learning curve —Omtool DMS Libraries v2.3 for TRIM Context uses TRIM Context's native windows which are familiar to your users.

Installation components

Omtool DMS Libraries v2.3 is included in the AccuRoute v2.3 installation. If you have AccuRoute v2.1, you should upgrade to AccuRoute v2.3 server and then install AccuRoute Desktop v2.2.3 on the client systems to get Omtool Libraries v2.3.

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

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Deployment summary

To deploy Omtool DMS Libraries v2.3 for TRIM Context:

1. Complete the installation requirements. (Go to Section 3: Adding TRIM connector.)
2. Complete any server configuration. (Go to Section 4: Required server configuration.)
3. Complete any optional configuration as necessary. (Go to Section 5: Optional server configuration.)
4. Complete the client configuration. (Go to Section 6: Client Configuration.)
5. Test profiling a document into TRIM Context. (Go to Section 7: Testing.)
6. Troubleshoot the installation. (Go to Section 8: Troubleshooting.)

Release notes

Enhancements

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

Omtool DMS Libraries v2.3 for TRIM Context has been qualified with AccuRoute Desktop v2.2.3.

Resolutions

Omtool DMS Libraries v2.3 for TRIM Context includes issues resolved during laboratory testing.

Known issues

Omtool DMS Libraries v2.3 for TRIM Context has the following known issues:

When using multiple use Embedded Directive, profiled document has metadata subset: When using a multiple use Embedded Directive to create a new document, only a subset of the metadata is copied over from the stub document.

When using multiple use Embedded Directive, the actual DOCID of the profiled document is different from the DOCID in the Embedded Directive: The TRIM recipient in the recipients list in AccuRoute Desktop shows the actual DOCID of a newly profiled document. However, when using multiple use Embedded Directives, the actual DOCID of the document profiled into TRIM Context is different from DOCID in the Embedded Directives.

Profiling existing documents use the account setup of the TRIM DMS connector: When a new document is profiled into TRIM Context, its author is recorded as the person who checked in the document. For subsequent

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document check in and check outs, the author is recorded as the account who created the TRIM DMS connector on the AccuRoute server.

All Omtool applications on the same system share the Omtool DMS Libraries configuration: Any change to the DMS configuration settings of one Omtool application affects the configuration settings of all installed Omtool applications on the system.

Limitations

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

Opening or editing a placeholder is not recommended: Opening or editing the placeholder for a profiled document can interfere with the successful profiling of a document into TRIM Context.

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 TRIM Context using AccuRoute Desktop - http://www.omtool.com/documentation/dmslibraries/v23/TRIM/OmtoolDMSLibrariesV23TRIMQuickStartGuide.pdf
- Administrator help - http://www.omtool.com/documentation/omtoolserver/v36/admin/

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Section 2: Requirements

This section includes:

Server requirements (2-1)
Client requirements (2-1)
Supported TRIM Context versions (2-2)

Server requirements

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

- ❒ AccuRoute v2.3

  If you are using Accuroute v2.1, you must update to the AccuRoute v2.3 server. Upgrading automatically installs the Omtool DMS Libraries v2.3 on the AccuRoute server.

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

- ❒ TRIM Context v6.2.2 software must be installed
- ❒ Tier 3 DMS connector license

Client requirements

The system where you install the TRIM Context integration must meet the following minimum requirements:

- ❒ AccuRoute Desktop v2.2.3
- ❒ TRIM Context v6.2.2 software must be installed

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Supported TRIM Context versions

- TRIM Context® v6.2.2 by TOWER Software

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Section 3: Adding TRIM connector

This section includes:

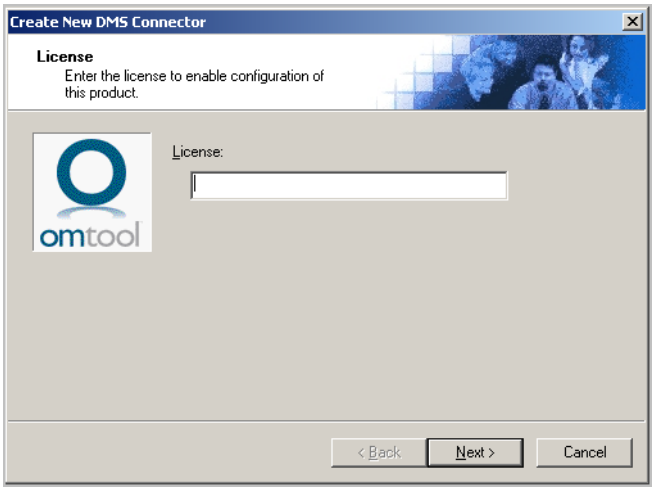
Adding the TRIM Context connector (3-1)
Configuring an existing TRIM Context connector (3-4)

Adding the TRIM Context connector

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

To add the TRIM Context connector to an AccuRoute server:

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



2 Enter the license key for the TRIM Context connector in the **LICENSE** text box.

3 Click **NEXT**.

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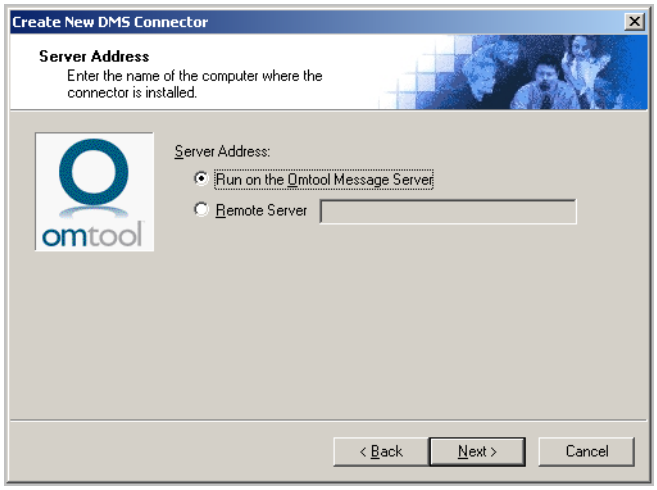
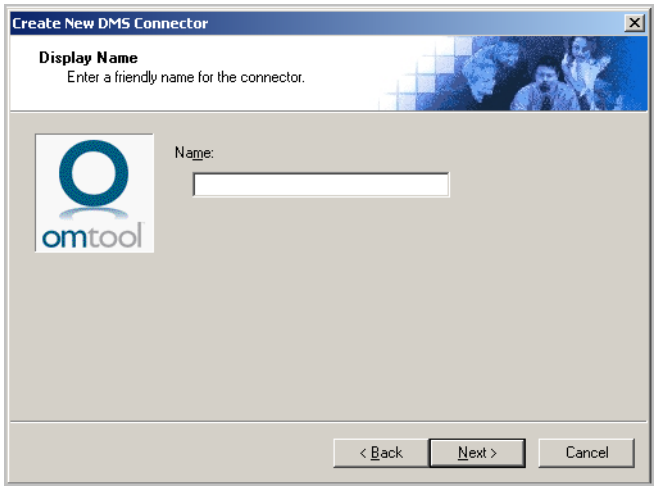
The **Server Address** page opens.



4 Verify the server is set to run on the Omtool Message Server and click **NEXT**. The **Display Name** page opens.



5 Enter a descriptive name in the **NAME** text box and click **NEXT**.

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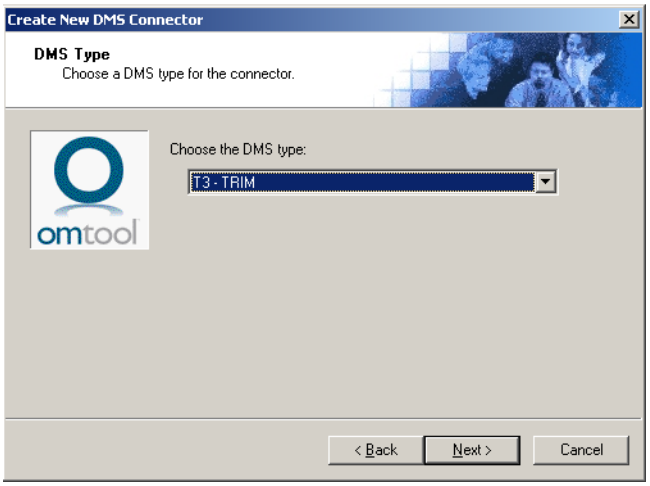
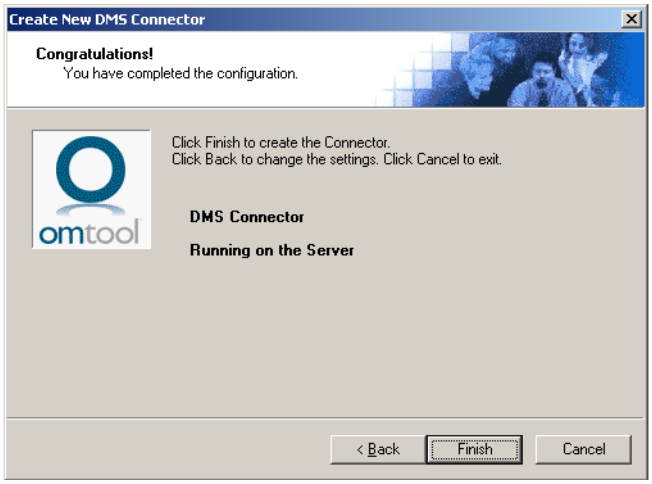
The **DMS Type** page opens.



6 Select **T3 - TRIM** from the drop-down list and click **NEXT**. The **Congratulations** page opens.



7 Click **FINISH**.

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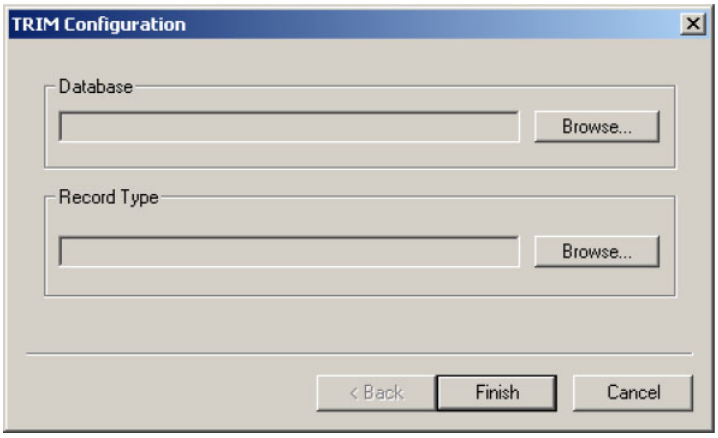
The DMS configuration wizard launches and prompts you to configure the connector to support TRIM Context.



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

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

8 In the **Database** section, click **BROWSE**, select the dataset where the user should save documents.

9 Click **OK**.

10 In the **Record Type** section, click **BROWSE**, select a record type from the list provided.

11 Click **OK**.

12 Click **FINISH**.

The Trim DMS connector is configured and listed in the details pane.

Configuring an existing TRIM Context connector

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

To complete the configuration wizard for an existing TRIM Context connector:

1 Click **CONNECTORS** in the console tree, and double-click the **TRIM** connector in the details pane.

2 Click the **ADVANCED** tab.

3 Locate the DMS Configuration section, and click **CONFIGURE**. The **TRIM Configuration** page opens.

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4 Configure as necessary using the information in steps 8 through 12 in Adding the TRIM Context connector (3-1)

5 Save your changes.

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Section 4: Required server configuration

This section includes:

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

Enabling TRIM Context as a recipient type in AccuRoute Desktop

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

1. Click **REGISTERED USERS** in the console tree and double-click an individual user in the details pane, or right-click **REGISTERED USERS** in the console tree and select **USER DEFAULTS**.
2. Click the **ACCUROUTE** tab.
3. Select **OVERRIDE DEFAULT ACCUROUTE SETTINGS** then select **ENABLE USE OF THE ACCUROUTE CLIENT**.
4. Locate **Allow user to route to** section and select **TRIM CONTEXT**.
5. Click **OK** to save your changes.

   Now when you start AccuRoute Desktop, TRIM is available.

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

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Section 5: Optional server configuration

This section includes:

Changing the label of a document (5-1)

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.

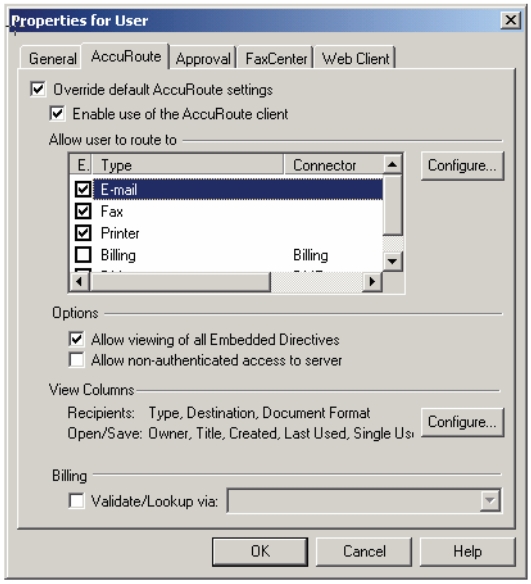
Tip If any individual users are registered on the AccuRoute server, complete this procedure once to modify user defaults and once for each individual user.

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. You can also right-click **REGISTERED USERS** and select **USER DEFAULTS** to open the **Properties** page of the user.

2 Click the **ACCUROUTE** tab.

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



4 Click **CONFIGURE** to open to open the **Routing Destination Properties** page.

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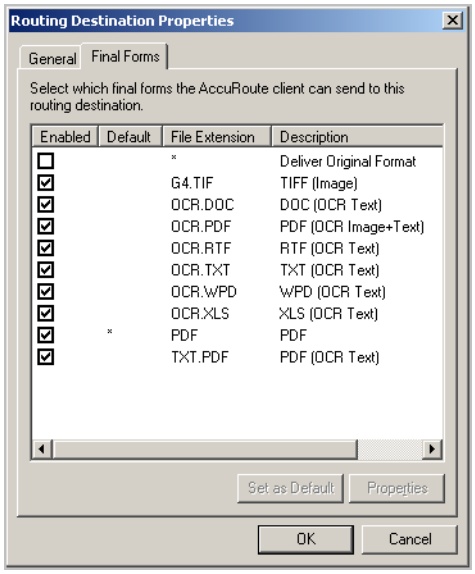
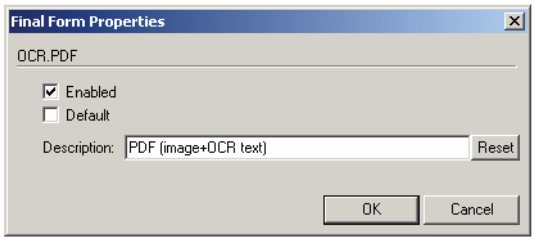
5 Click the **FINAL FORMS** tab.

6 Highlight the file extension type that needs to be modified.



7 Click **PROPERTIES**. The **Final Forms Properties** page opens.



8 In the **DESCRIPTION** text box, enter the new label for this file extension type.

9 Click **OK**, then **OK** and **OK** again to close all open pages.

10 Repeat the above steps for any other document type for which you want to change the label.

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Section 6: Client Configuration

This section includes:

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

Configuring AccuRoute Desktop

To add TRIM Context functionality to AccuRoute Desktop:

1. Start AccuRoute Desktop and log in.
2. Click **TOOLS** on the menu bar and select **CONFIGURE DMS**.
3. Select **TRIM** from the menu that appears. The **TRIM Configuration** page opens.
4. Configure as necessary using the information in steps 8 through 12 in Adding the TRIM Context connector (3-1)
5. Save your changes.

Client deployment methods

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

- Configure AccuRoute Desktop to support TRIM Context on one client workstation. Then, copy the DMS Libraries configuration file to the Omtool DMS libraries setup directory where it can be propagated to client workstations during installation. Continue to Configuring TRIM Context for client rollout using AccuRoute Desktop.
- Install AccuRoute Desktop on each individual workstation and perform the configuration steps for TRIM Context manually. Continue to Configuring TRIM Context manually.

Configuring TRIM Context for client rollout using AccuRoute Desktop

This procedure is entirely optional. if you do not complete this procedure before deploying the Omtool DMS Libraries, however, you (or the user) must configure the libraries to support TRIM Context manually after you install AccuRoute Desktop.

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To pre-configure the Omtool DMS Libraries for deployment:

1. Install AccuRoute Desktop v2.2.3 on a workstation.
2. Configure the Omtool DMS Libraries to support TRIM Context. 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 v2.2.3 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 TRIM Context. When you are ready to deploy TRIM Context, launch `setup.exe` in the AccuRoute Desktop directory.

Configuring TRIM Context manually

To configure TRIM Context manually:

AccuRoute Desktop - Configuring AccuRoute Desktop (6-1)

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Section 7: Testing

This section includes:

Sending a message to TRIM Context from AccuRoute Desktop (7-1)

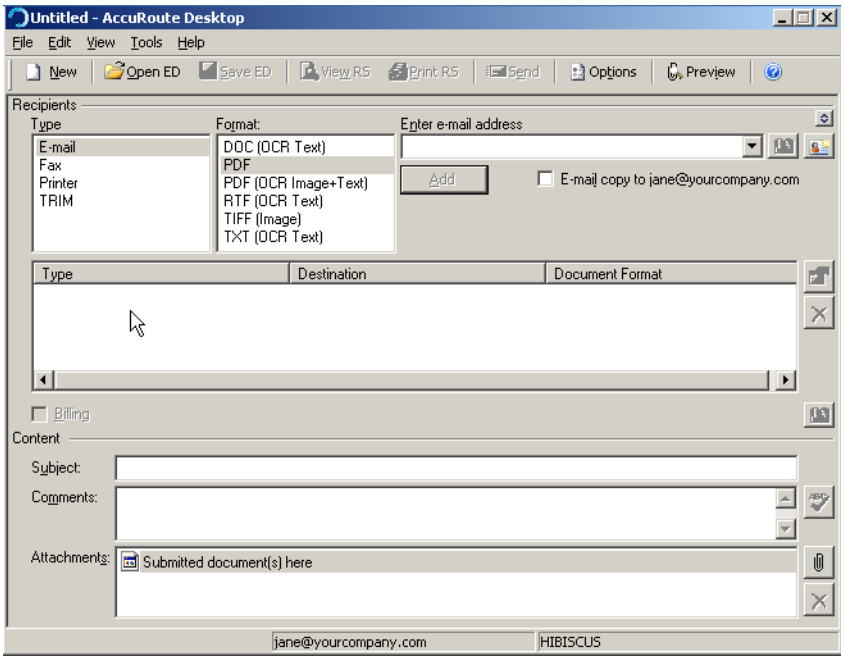
Sending a message to TRIM Context from AccuRoute Desktop

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

For detailed information on sending messages using AccuRoute Desktop, consult the AccuRoute Desktop users guide.

To send a message to TRIM Context using AccuRoute Desktop:

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



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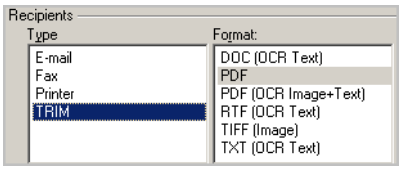
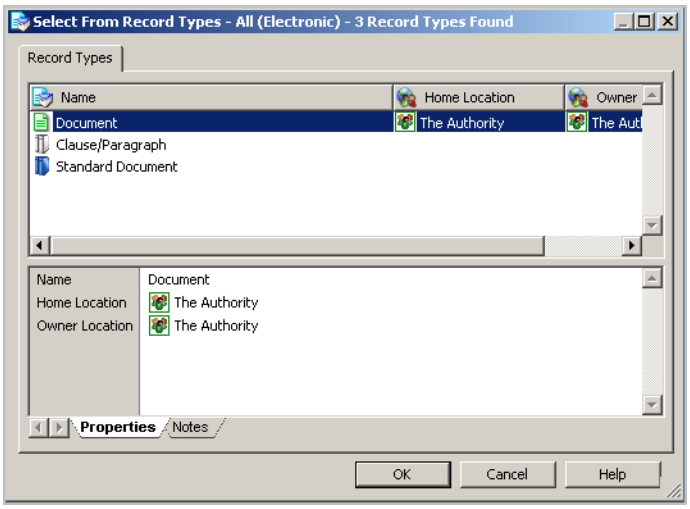
2 Select the destination type **TRIM** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.



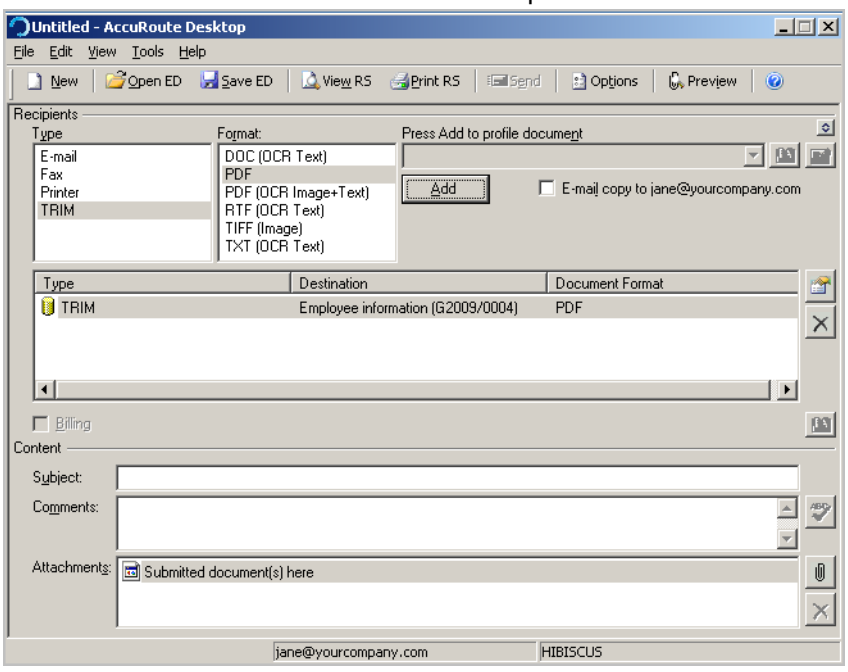
3 Click **ADD**. The **Select from Record Types** page opens.



4 Select the record type and click **OK**. The **New Record** page opens.

5 Enter all required and if you want optional information and click **OK**.

6 The stub document is listed in AccuRoute Desktop.



7 Add content to your message.

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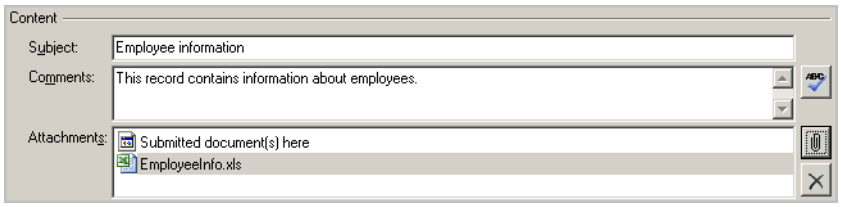
a Locate the **CONTENT** section at the bottom and type a subject and comments.

b Add any attachments you want to send with your message.

Note Your message must have at least one attachment.

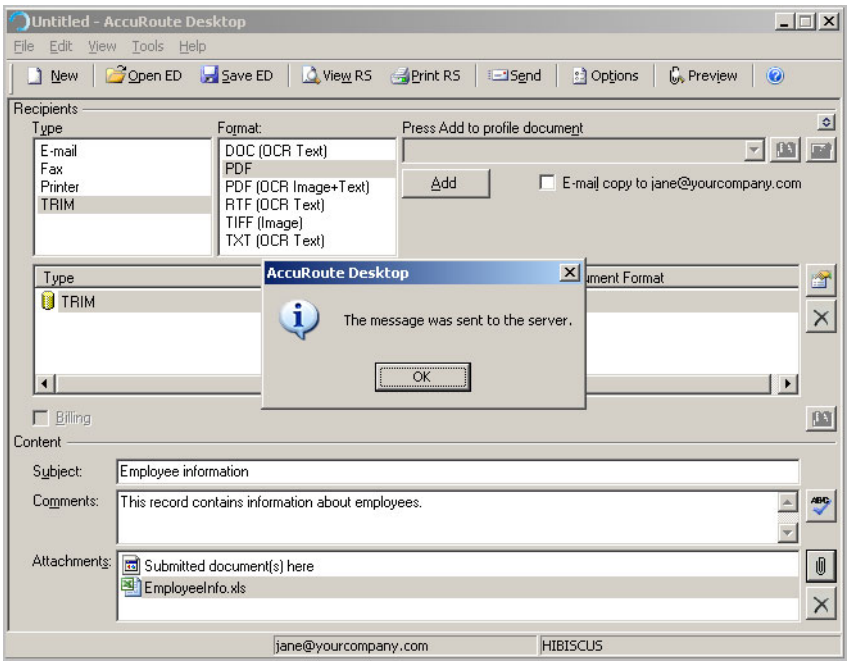
Click the paperclip icon and choose from:

- **FILE** - Select this option to attach a file that is located in your system or in your 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. Enter 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 Send or save the message using one of the following methods:

- **Send the message immediately** - Click **SEND** on the toolbar. A message box indicates that your message has been sent to the server. Click **OK** to close the message.



- **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 **VIEW RS** on the toolbar. AccuRoute Desktop

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creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your network administrator. (Your message can include both electronic and hard copy documents.)

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Section 8: Troubleshooting

This section includes:

Detecting workflow issues (8-1)

Troubleshooting the delivery mechanism (8-1)

Troubleshooting the message on the Omtool server (8-2)

Troubleshooting the multifunction device (8-3)

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 TRIM Context, 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 TRIM Context, 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 TRIM Context. Do some basic troubleshooting on TRIM Context. If TRIM Context is functioning correctly, troubleshoot the message on the Omtool server.

Continue to Troubleshooting the message on the Omtool server.

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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:

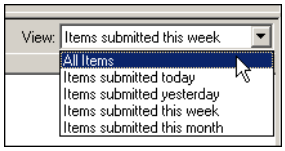
1 Start the Administrator.

2 Go to **OMTOOL SERVER ADMINISTRATOR > [SERVERNAME] > MESSAGES**.

3 Look for the message in the In Process queue:

a Click **IN PROCESS**.

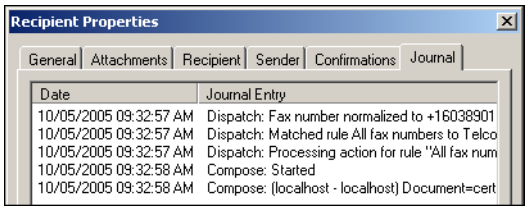
b View **ALL ITEMS**.



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.



- **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**.

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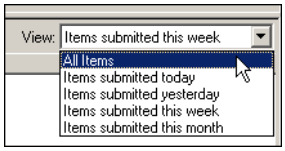
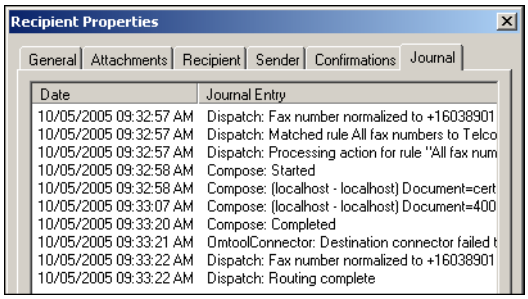
b View **ALL ITEMS**.



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 TRIM Context successfully. Do some advanced troubleshooting on TRIM Context 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.)

- **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.

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Troubleshooting the client

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

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