
Omtool DMS Libraries v2.3 installation and integration guide for Open Text Document Management, eDOCS Edition (eDOCS DM)

For AccuRoute v2.3



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 1AL
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>

© 2010, Omtool, Ltd. All Rights Reserved.

AccuRoute[®], Genifax[™], Image-In[™], ObjectArchive[™], Omtool[™], Swiftwriter[®] 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 Website 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 <http://www.omtool.com/support> 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 <http://www.omtool.com/support/entitlements.cfm>.

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:** Sales@Omtool.com

Contents

Section 1: Introduction

Omtool DMS Libraries integration with Open Text Document Management, eDOCS Edition (eDOCS DM)	1-1
Installation components	1-2
Deployment summary	1-2
Release notes	1-2
Enhancements	1-2
Resolutions	1-3
Limitations	1-3
Related documentation	1-3

Section 2: Requirements

Server requirements	2-1
Client requirements	2-1
Supported Open Text Document Management, eDOCS Edition (eDOCS DM) versions	2-2

Section 3: Installation

Adding the AccuRoute Connector for Open Text Document Management, eDOCS Edition (eDOCS DM)	3-1
Completing the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM)	3-1
Configuration Wizard	3-3
All Omtool applications on the same system share the Omtool DMS Libraries configuration	3-4
Configuring a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM)	3-4
Configuring an existing AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM)	3-6

Section 4: Required server configuration

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

Section 5: Optional server configuration

Changing the label of a document	5-1
--	-----

Section 6: Client configuration

Configuring AccuRoute Desktop	6-1
Client deployment methods	6-1
Configuring Open Text Document Management, eDOCS Edition (eDOCS DM) for client rollout	6-2
Configuring Open Text Document Management, eDOCS Edition (eDOCS DM) manually	6-2

Section 7: Optional billing configuration

Enabling billing on the connector	7-1
---	-----

Enabling billing in the Billing component.....7-2
Enabling billing for Registered users7-2
Automatic billing entry.....7-2

Section 8: Testing

Sending a message to DM8-1

Section 9: Troubleshooting

Detecting workflow issues.....9-1
Troubleshooting the delivery mechanism9-1
Troubleshooting the message on the Omtool Server.....9-1
Troubleshooting the multifunction device9-3
Troubleshooting the client.....9-4

Section 1: Introduction

This guide contains instructions on deploying Omtool DMS Libraries v2.3 for Open Text Document Management, eDOCS Edition (eDOCS DM). It is written for systems administrators with detailed knowledge of the Omtool Server and Open Text Document Management, eDOCS Edition (eDOCS DM).

This section includes:

[Omtool DMS Libraries integration with Open Text Document Management, eDOCS Edition \(eDOCS DM\)](#) (I-1)

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

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

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

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

Omtool DMS Libraries integration with Open Text Document Management, eDOCS Edition (eDOCS DM)

Omtool DMS Libraries v2.3 includes the ability to integrate with Open Text Document Management, eDOCS Edition (eDOCS DM).

Using Omtool DMS Libraries v2.3, you can be sure all of your important documents are stored in Open Text Document Management, eDOCS Edition (eDOCS DM). The combined power of AccuRoute Desktop and Omtool DMS Libraries v2.3 for Open Text Document Management, eDOCS Edition (eDOCS DM) allows your users to send both soft copy and hard copy documents to Open Text Document Management, eDOCS Edition (eDOCS DM) quickly and easily.

Best of all, there is no learning curve for your users—Omtool DMS Libraries v2.3 for Open Text Document Management, eDOCS Edition (eDOCS DM) uses Open Text Document Management, eDOCS Edition (eDOCS DM)'s native windows and are totally familiar to your users.

For more information on profiling documents to Open Text Document Management, eDOCS Edition (eDOCS DM), go to [Section 8: Testing](#) (8-1)

Installation components

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

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

Deployment summary

To deploy Omtool DMS Libraries v2.2 for Open Text Document Management, eDOCS Edition (eDOCS DM):

- 1 Review the requirements and make sure you fulfil the necessary requirements. (Go to [Section 2: Requirements.](#))
- 1 Complete the installation requirements. (Go to [Section 3: Installation.](#))
- 2 Complete the required server configuration. (Go to [Section 4: Required server configuration.](#))
- 3 Complete any optional server configuration. (Go to [Section 5: Optional server configuration.](#))
- 4 Complete the client configuration. (Go to [Section 6: Client configuration.](#))
- 5 Complete any optional billing configuration. [Optional billing configuration](#) (7-1)
- 6 Test profiling a document into Open Text Document Management, eDOCS Edition (eDOCS DM). (Go to [Section 8: Testing.](#))
- 7 Troubleshoot the installation. (Go to [Section 9: Troubleshooting.](#))

Release notes

Enhancements

Omtool DMS Libraries v2.3 for Open Text Document Management, eDOCS Edition (eDOCS DM) includes the following enhancements:

Omtool DMS Libraries v2.3 for Open Text Document Management, eDOCS Edition (eDOCS DM) has been qualified with AccuRoute Desktop v2.2 or higher

Resolutions

Omtool DMS Libraries v2.3 for Open Text Document Management, eDOCS Edition (eDOCS DM) includes the following resolved issues:

- When the Open Text Document Management, eDOCS Edition (eDOCS DM) client was using Windows authentication, the first use of a Routing Sheet with a destination of DM scanned successfully, but any subsequent scans failed with an error: An internal consistency check has failed. See Knowledge Base Articles K03794 and K03795.
- While saving an Embedded Directive in Open Text Document Management, eDOCS Edition (eDOCS DM), users were prompted for the validation server library. See Knowledge Base Article K03797.
- AccuRoute Desktop was not deleting temporary files called “stub documents” from some DMS applications. This issue impacted DMS applications that do not require AccuRoute Desktop to create a stub document before routing the document to the DMS application. See Knowledge Base Article K03805.
- 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.
- The OmtoolStub document name was not configurable. See Knowledge Base Article K03746.

Limitations

Omtool DMS Libraries v2.3 for Open Text Document Management, eDOCS Edition (eDOCS DM) includes no known limitations.

Related documentation

- AccuRoute Desktop Installation Guide - <http://www.omtool.com/documentation/AccuRoute/v22/AccuRouteDesktop/AccuRouteDesktopV22InstallGuide.pdf>
- AccuRoute Desktop Users Guide - <http://www.omtool.com/documentation/AccuRoute/v22/AccuRouteDesktop/AccuRouteDesktopV22UserGuide.pdf>
- Sending a message to DM using AccuRoute Desktop - <http://www.omtool.com/documentation/dmslibraries/v22/DM/OmtoolDMSLibrariesV22DMQuickStartGuide.pdf>
- Administrator Help - <http://www.omtool.com/documentation/omtoolserver/v331/admin/>

Section 2: Requirements

This section includes:

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

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

[Supported Open Text Document Management, eDOCS Edition \(eDOCS DM\) versions](#) (2-2)

Server requirements

The system where you install the DMS connector for DM 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.

- The DM client software, including the shell extensions **Windows Explorer DM Extension** and **Windows Desktop DM Extension**, must be installed on the Omtool Server.

Important You should not open or use the DM client software on the AccuRoute Server system.

- The DM client software installed on the AccuRoute Server must not integrate with Microsoft Word

Note Do not install **Interceptor** on a system where you plan to install the Omtool DMS Libraries. **Interceptor**, an optional component of the Open Text Document Management, eDOCS Edition (eDOCS DM) client installation, is not supported with the Omtool DMS Libraries.

- Tier 2 DMS connector license

Client requirements

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

- AccuRoute Desktop v2.2 or higher
- The DM client software, including the shell extensions **Windows Explorer DM Extension** and **Windows Desktop DM Extension**, must be installed on all client workstations

Supported Open Text Document Management, eDOCS Edition (eDOCS DM) versions

- Open Text Document Management, eDOCS Edition (eDOCS DM) v6.x, v5.1/v5.1.0.5 SR5

Section 3: Installation

This section includes:

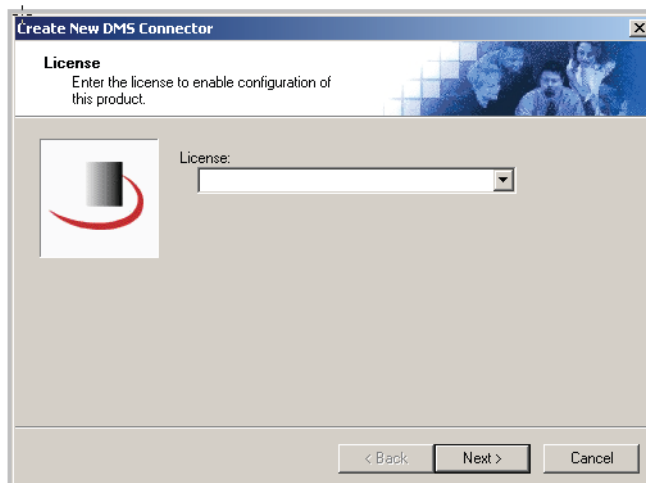
[Adding the AccuRoute Connector for Open Text Document Management, eDOCS Edition \(eDOCS DM\) \(3-1\)](#)

[Completing the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\) Configuration Wizard \(3-3\)](#)

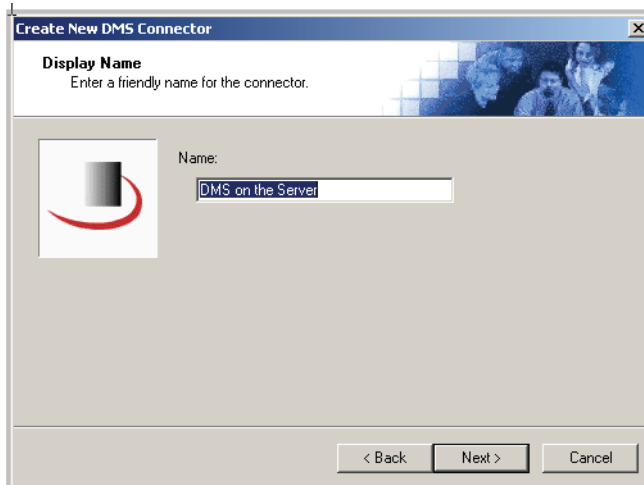
Adding the AccuRoute Connector for Open Text Document Management, eDOCS Edition (eDOCS DM)

To add the AccuRoute Connector for Open Text Document Management, eDOCS Edition (eDOCS DM) to an AccuRoute Server:

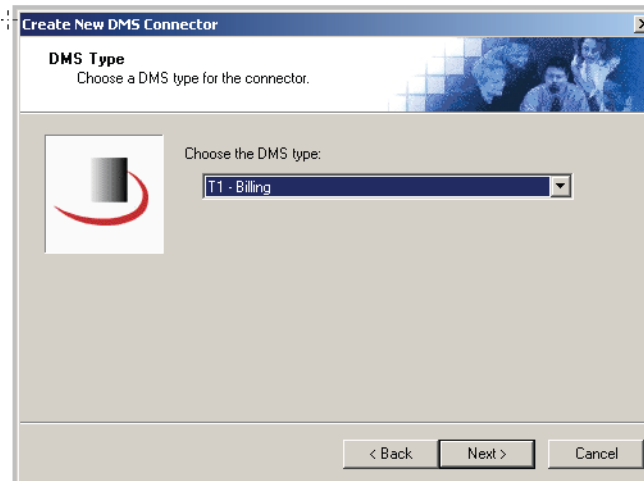
- 1 Right-click **CONNECTORS** in the console tree and select **NEW > DMS**. The License window opens.



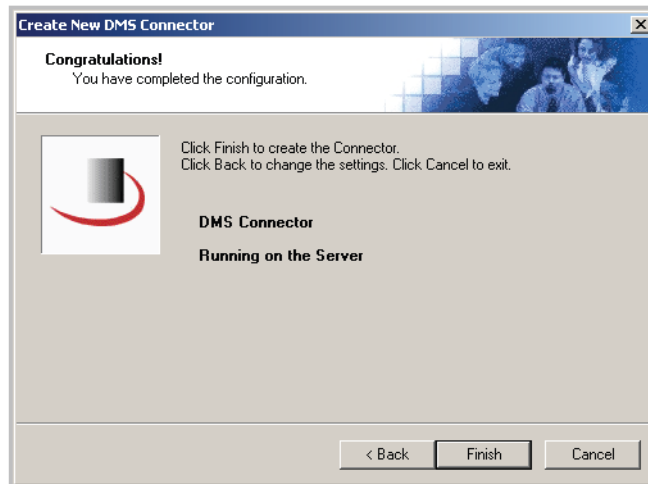
- 2 Enter the license key for the AccuRoute Connector for Open Text Document Management, eDOCS Edition (eDOCS DM) in the **LICENSE** text box and click **NEXT**. The **Display Name** window opens.



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



- 4 Select **T2 - DM** from the drop-down list and click **NEXT**. Configuration is complete and the Congratulations window opens.



- 5 Click **FINISH**.

The DMS configuration wizard launches and prompts you to configure the connector to support Open Text Document Management, eDOCS Edition (eDOCS DM).

Continue to [Completing the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\) Configuration Wizard](#).

Completing the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM) Configuration Wizard

[All Omtool applications on the same system share the Omtool DMS Libraries configuration](#) (3-4)

[Configuring a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\)](#) (3-4)

[Configuring an existing AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\)](#) (3-6)

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

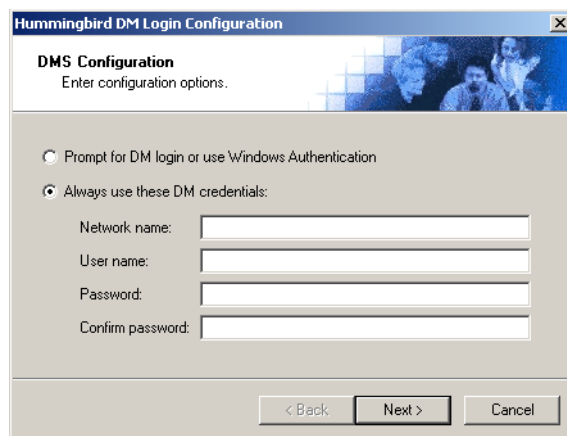
When multiple Omtool applications are installed on the same system, these applications share the same DMS configuration data. If you make changes to the DMS configuration settings for one Omtool application, those changes affect all Omtool applications installed on the system.

Configuring a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM)

The Hummingbird DM Login Configuration window opens immediately after you complete the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM).

Figure 3-A: Hummingbird DM Login Configuration window

Select your authentication method on this window.



To complete the configuration wizard for a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM):

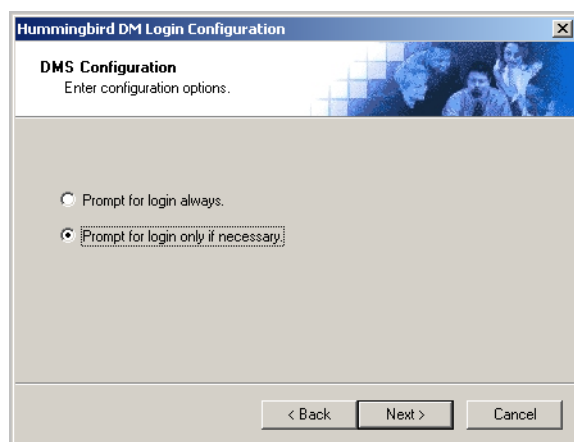
- I Select an authentication option:
 - ▶ **PROMPT FOR DM LOGIN OR USE WINDOWS AUTHENTICATION** - Select this option if the Open Text Document Management, eDOCS Edition (eDOCS DM) server should prompt the Omtool user for Open Text Document Management, eDOCS Edition (eDOCS DM) login credentials or accept the current user's Windows login credentials. (When Windows authentication is enabled on the Open Text Document Management, eDOCS Edition (eDOCS DM) server and this option is selected, the Open Text Document Management, eDOCS Edition (eDOCS DM) server accepts the current user's Windows login credentials automatically.)

- ▶ **ALWAYS USE THESE OPEN TEXT DOCUMENT MANAGEMENT, EDOCS EDITION (EDOCS DM) CREDENTIALS** - Select this option to connect to the Open Text Document Management, eDOCS Edition (eDOCS DM) server using specific login credentials. **NETWORK NAME** is optional unless you are using a NetWare Server. If you are using a NetWare Server, enter the name of the NetWare Server in this text box. Enter the user name and password in the **USER NAME**, **PASSWORD**, and **CONFIRM PASSWORD** text boxes.

If you are configuring the DMS connector on an AccuRoute Server and the Open Text Document Management, eDOCS Edition (eDOCS DM) server has been configured to accept Windows authentication, you must select the **ALWAYS USE THESE DM CREDENTIALS** option and provide the login credentials for a Open Text Document Management, eDOCS Edition (eDOCS DM) account that can access all libraries and update all documents. (When the Open Text Document Management, eDOCS Edition (eDOCS DM) server has been configured to use Windows authentication, the AccuRoute Server cannot obtain the user's DM login credentials or Windows login credentials.) This type of global access is required because the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM), logged in as a Open Text Document Management, eDOCS Edition (eDOCS DM) user, must be able to locate the stub document (the stub document is a temporary document or placeholder for the document that is being routed to Open Text Document Management, eDOCS Edition (eDOCS DM)) and update it with the actual document being routed to Open Text Document Management, eDOCS Edition (eDOCS DM).

If the Open Text Document Management, eDOCS Edition (eDOCS DM) server does not accept Windows authentication, Omtool strongly recommends that you provide the login credentials of a Open Text Document Management, eDOCS Edition (eDOCS DM) administrator or a Open Text Document Management, eDOCS Edition (eDOCS DM) user with administrative permissions. In rare circumstances when the AccuRoute Server cannot obtain the Open Text Document Management, eDOCS Edition (eDOCS DM) login credentials of the AccuRoute Desktop user, the AccuRoute Server presents these login credentials to Open Text Document Management, eDOCS Edition (eDOCS DM). This reduces the possibility of an authentication failure.

- 2 Click **NEXT**. The Hummingbird Open Text Document Management, eDOCS Edition (eDOCS DM) Login Configuration window opens.



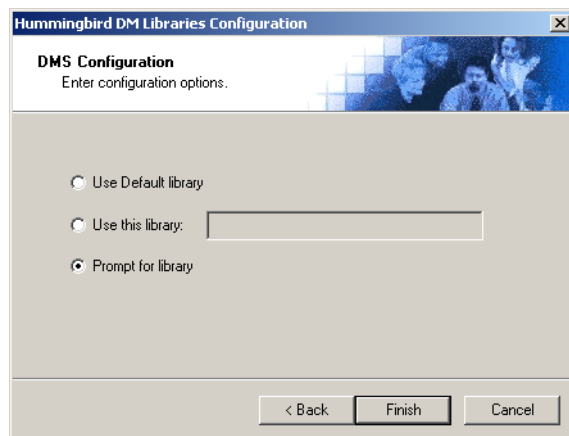
- 3 Select an authentication option and then click **NEXT**.

- ▶ **PROMPT FOR LOGIN ALWAYS** - Select this option if the Open Text Document Management, eDOCS Edition (eDOCS DM) server should always prompt the Omtool user for Open Text Document Management, eDOCS Edition (eDOCS DM) login credentials.

- ▶ **PROMPT FOR LOGIN ONLY IF NECESSARY** - Select this option if the Open Text Document Management, eDOCS Edition (eDOCS DM) server should prompt the Omtool user for Open Text Document Management, eDOCS Edition (eDOCS DM) login credentials only when necessary.

If you are configuring the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM) on an AccuRoute Server, the option you select has no impact on document routing. 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.

- 4 Click **NEXT**. The Hummingbird DM Libraries Configuration window opens.



- 5 Specify the Open Text Document Management, eDOCS Edition (eDOCS DM) library where the Omtool user should save documents:
 - ▶ **USE DEFAULT LIBRARY** - Select this option to save documents to the Open Text Document Management, eDOCS Edition (eDOCS DM) user's default library.
 - ▶ **USE THIS LIBRARY** - Select this option to save documents to a particular library, and then enter the name of the library in the text box.
 - ▶ **PROMPT FOR LIBRARY** - Select this option to prompt the Open Text Document Management, eDOCS Edition (eDOCS DM) user to select a library.

If you are configuring the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM) on an AccuRoute Server, the option you select has no impact on document routing. 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.

- 6 Click **FINISH**.

Configuring an existing AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM)

To complete the configuration wizard for an existing AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM) connector:

- 1 Click **CONNECTORS** in the console tree and double-click the Open Text Document Management, eDOCS Edition (eDOCS DM) connector in the details pane.
- 2 Click the **ADVANCED** tab.
- 3 Locate the DMS Configuration section and click **CONFIGURE**. The Hummingbird DM Login Configuration window appears.
- 4 Perform steps one through six in [Configuring a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\)](#) (3-4).

Section 4: Required server configuration

This section includes:

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

Enabling DM as a recipient type in AccuRoute Desktop

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

Now when you start AccuRoute Desktop, DM 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 5: Optional server configuration

This section includes:

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

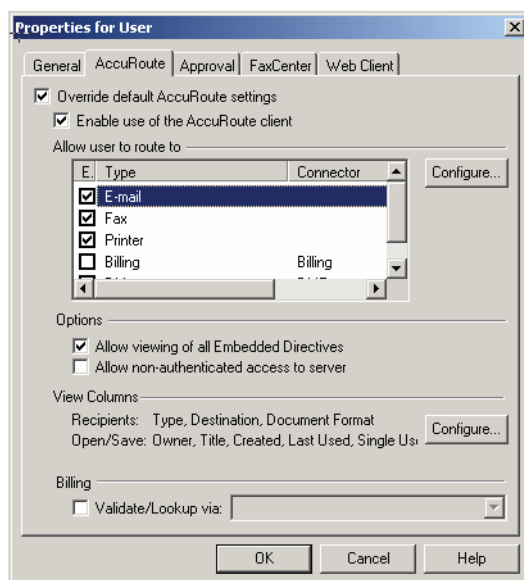
Changing the label of a document

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 Server Administrator under Registered Users.

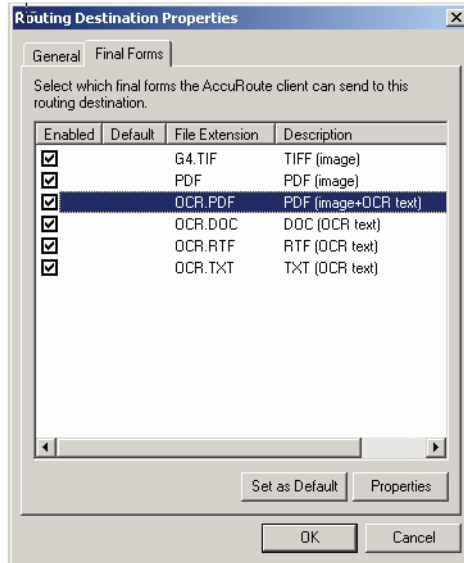
Tip If any individual users are registered on the AccuRoute Server, complete this procedure once to modify user defaults and once for each individual user.

To change the label of a document type

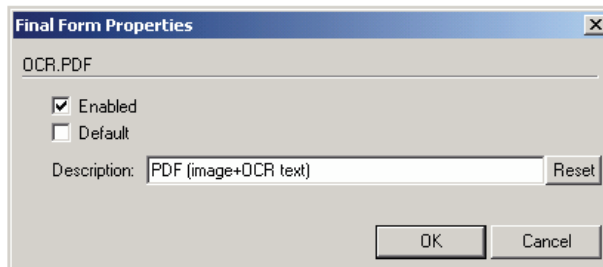
- 1 Click **REGISTERED USERS** in the console tree and double-click an individual user in the details pane, or right-click **REGISTERED USERS** in the console tree and select **USER DEFAULTS**.
- 2 Click the **ACCURROUTE** tab.
- 3 Highlight an item in the **ALLOW USER TO ROUTE TO** list.



- 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 Open Text Document Management, eDOCS Edition (eDOCS DM) functionality to AccuRoute Desktop:

- 1 Start AccuRoute Desktop and log in.
- 2 Click **TOOLS** on the menu bar and select **CONFIGURE DMS**.
- 3 Select **DM** from the menu that appears. The Hummingbird DM Login Configuration window opens.
- 4 At this point, the configuration is identical to that of the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM) configuration. Perform steps one through six in [Configuring a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\)](#) (3-4).

Client deployment methods

There are two methods available for deploying clients to individual workstations with Open Text Document Management, eDOCS Edition (eDOCS DM) functionality:

- Configure AccuRoute Desktop to support Open Text Document Management, eDOCS Edition (eDOCS DM) 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.
- Install AccuRoute Desktop on each individual workstation and perform the configuration steps for Open Text Document Management, eDOCS Edition (eDOCS DM) manually.

Configuring Open Text Document Management, eDOCS Edition (eDOCS DM) 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 Open Text Document Management, eDOCS Edition (eDOCS DM) 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 Open Text Document Management, eDOCS Edition (eDOCS DM). 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 v2.2 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 Open Text Document Management, eDOCS Edition (eDOCS DM). When you are ready to deploy Open Text Document Management, eDOCS Edition (eDOCS DM), launch setup.exe in the AccuRoute Desktop directory.

Configuring Open Text Document Management, eDOCS Edition (eDOCS DM) manually

To configure Open Text Document Management, eDOCS Edition (eDOCS DM) manually:

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

Section 7: Optional billing configuration

This section includes:

[Enabling billing on the connector](#) (7-1)

[Enabling billing in the Billing component](#) (7-2)

[Enabling billing for Registered users](#) (7-2)

[Automatic billing entry](#) (7-2)

To use billing when profiling your Open Text Document Management, eDOCS Edition (eDOCS DM) message, enable billing on the Open Text Document Management, eDOCS Edition (eDOCS DM) connector, and then enable it for Registered Users.

Enabling billing on the connector

When enabling billing on the connector, the parent field in the matter properties of the connector must point to the display name of the client field and not the actual field name.

Billing field names are case sensitive. When configuring Author, Client, and Matter fields, make sure to use the correct case. Using the incorrect case causes billing validation to fail; lookups, however, are successful.

To enable Billing on the Open Text Document Management, eDOCS Edition (eDOCS DM) connector:

- 1 Click **CONNECTORS** in the console tree, and double-click the Open Text Document Management, eDOCS Edition (eDOCS DM) connector to open the Properties page.
- 2 Click the **ADVANCED** tab.
- 3 Go to the **BILLING** drop-down list, select either **BILLING SELECTABLE** or **BILLING MANDATORY**.
- 4 Where applicable, configure the **Author**, **Client**, and **Matter** fields in the **Fields** section.
In this section you can add new fields, remove existing fields, and specify the properties for fields in the list.
In the **Properties** section, you can select the field's **Display Name**, select **MUST BE VALIDATED AGAINST THE DMS'S CODES**, how to validate (**VALIDATE FIELD**, **LOOKUP FIELD**, and **PARENT**), as well as set the **MINIMUM LENGTH** and **MAXIMUM LENGTH** of the billing field. If an option is greyed out, it is not available for use.
- 5 Click **OK** to save the properties of the billing fields.
- 6 Change the Routing Identifier in the **ROUTING IDENTIFIER** text box if desired. It is populated with a default Routing Identifier.
- 7 Click **OK** to save your changes.

Enabling billing in the Billing component

If you are using CostRecovery, you also need to enable billing in the Billing component.

To enable billing in the Billing component:

- 1 Click **COMPONENTS** in the console tree, and double-click the **BILLING** component.
- 2 Click the **CONFIGURATION** tab.
- 3 Select **ENABLE COLLECTION OF BILLING DATA**.
- 4 Add, Delete, or configure the Properties in the Omtool Property list if needed.
- 5 Click **OK**.

Enabling billing for Registered users

After you enable billing on the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM), you need to enable billing for the default Registered user and any individual Registered users.

To enable Billing for Registered users:

- 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 **VALIDATE/LOOKUP VIA**, then select the **DM** connector from the drop-down list.
- 4 Click **OK** to save your changes.

Billing Entry is now available in new instances of AccuRoute Desktop.

Automatic billing entry

Automatic billing entry functionality automatically inserts billing information from the message profile window. This functionality is available only with:

- AccuRoute Server v2.1 or higher
- AccuRoute Desktop v2.2 or higher

If you want to make automatic billing entry available in AccuRoute Desktop, you must modify the AccuRoute properties of Registered Users. A DMS that supports billing must be installed and configured, and billing must be enabled before you can use the automatic billing entry functionality.

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.

Section 8: Testing

This section includes:

[Sending a message to DM \(8-1\)](#)

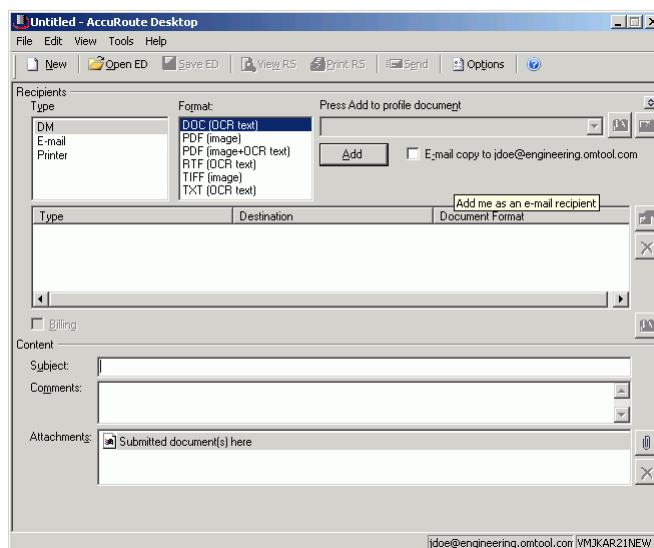
To test the installation and configuration of Omtool DMS Libraries v2.3 for DM, send a message using AccuRoute Desktop.

For detailed information on sending messages using AccuRoute Desktop, consult the [AccuRoute Desktop User Guide](#).

Sending a message to DM

To send a message to DM using AccuRoute Desktop:

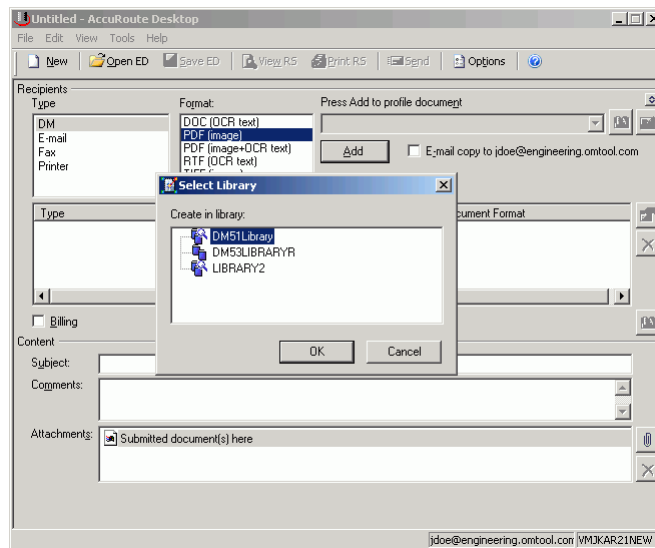
- 1 Start AccuRoute Desktop. Click **START**, go to the Omtool programs group, and select **ACCURROUTE DESKTOP**. Log in if prompted. The application appears on your desktop.



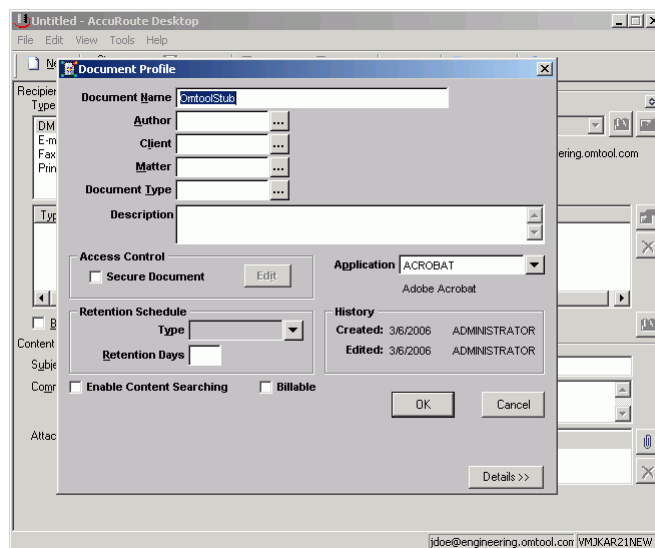
- 2 Select the destination type **DM** (DM) in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.

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

3 Click **ADD**. The **Select Library** window opens.

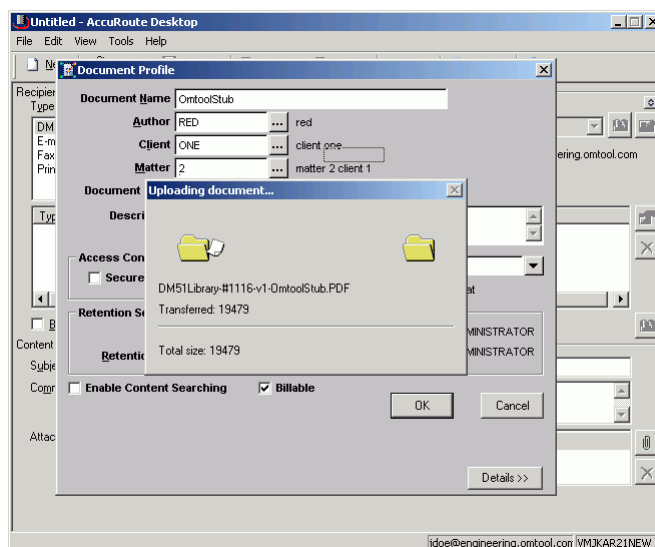


4 Select the appropriate DM library and click **OK**. The **Document Profile** window opens.

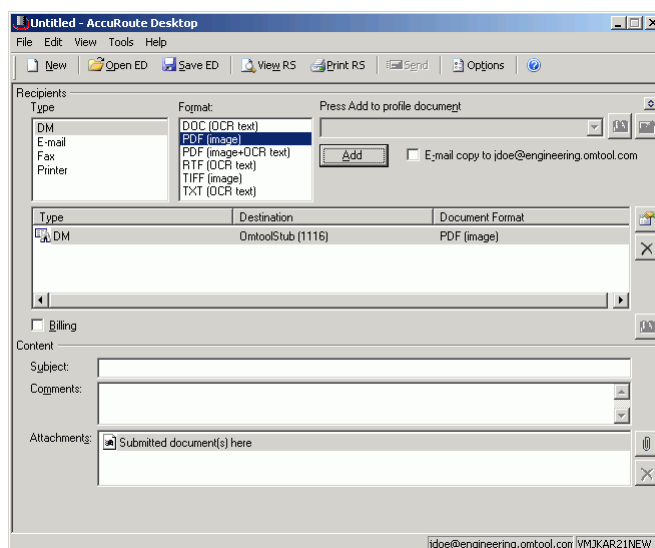


For information on using billing, consult the AccuRoute Desktop User Guide or your system administrator.

- 5 Complete the **Document Profile** window and click **OK**. The **Uploading document** window opens.



When the upload is complete, an OmtoolStub destination appears in the message.

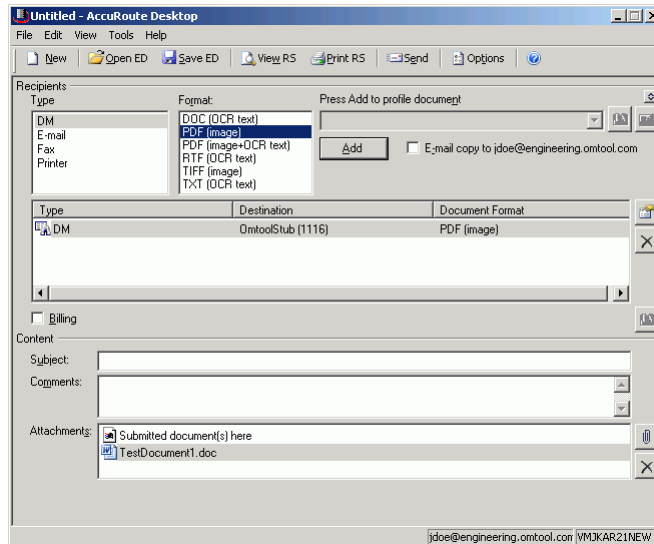


Note When you create a Routing Sheet for DM, AccuRoute creates a placeholder for the document. Never open, edit, or delete this placeholder.

- 6 Add content to your message.
- a Locate the **CONTENT** section at the bottom and type a subject and comments.
 - b Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:
 - FILE** - Select this option to attach a file saved from your computer or network share. Browse to the

file, select it, and click **OPEN**. The file appears in the attachments list.

WEB DOCUMENT - Select this option to attach a Web page from the Internet. 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**.



7 Do any of the following:

Send the message immediately - Click **SEND** on the toolbar. A message box indicates that your message has been sent to the server. (Your message must have at least one attachment.)

Save the message as an Embedded Directive - Click **SAVE ED** on the toolbar, type a title for the Embedded Directive, and click **SAVE**.

Print a Routing Sheet that can be scanned with hard copy documents - Save the message as an Embedded Directive. Then click **PRINT ED** on the toolbar. AccuRoute Desktop creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your network administrator. (Your message can include both electronic and hard copy documents.)

Section 9: Troubleshooting

This section includes:

[Detecting workflow issues](#) (9-1)

[Troubleshooting the delivery mechanism](#) (9-1)

[Troubleshooting the message on the Omtool Server](#) (9-1)

[Troubleshooting the multifunction device](#) (9-3)

[Troubleshooting the client](#) (9-4)

Complete these procedures in the order they appear. If you cannot resolve the issue, contact Omtool.

Detecting workflow issues

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

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 DM. Do some basic troubleshooting on DM. If DM is functioning correctly, troubleshoot the message on the Omtool Server.

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

Troubleshooting the message on the Omtool Server

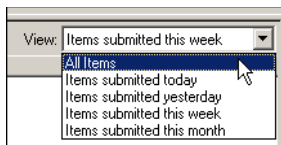
There are two important questions that can be resolved when troubleshooting a message on the Omtool Server:

- 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:

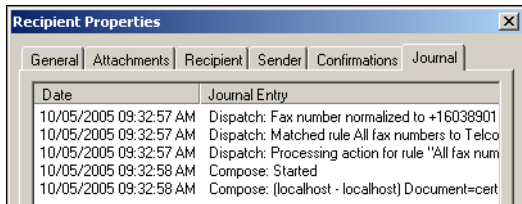
- 1 Start the Administrator.
- 2 Go to **OMTOOL SERVER ADMINISTRATOR > [SERVERNAME] > MESSAGES.**
- 3 Look for the message in the In Process queue:
 - a Click **IN PROCESS.**
 - b View **ALL ITEMS.**



- 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.

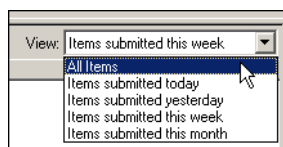
Note If you open the Journal while the message is still processing, you need to close the Journal properties before the Journal will update.

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

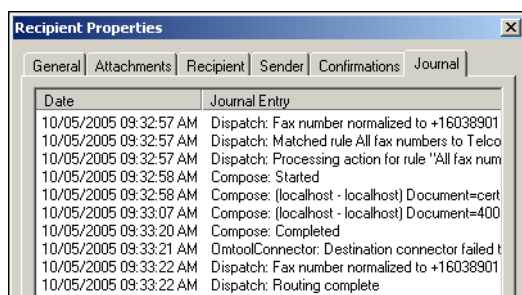


- **Message not found** - Go to step 4 and look for the message in the History queue.

- 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.

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 DM successfully. Do some advanced troubleshooting on DM to determine why the message is not being delivered to its destination. Contact Omtool if you are unable to resolve the issue.

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.

Troubleshooting the multifunction device

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

Troubleshooting the client

If the device is working properly, try sending a message from the client to a recipient other than DM. If you are able to send messages to recipients other than DM and DM is operating correctly, contact Omtool.