
Omtool DMS Libraries v3.0 | Installation and Integration Guide for Autonomy iManage WorkSite

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Section I: Introduction

This guide contains instructions on deploying Omtool DMS Libraries v3.01 for Autonomy iManage WorkSite. It is written for systems administrators with detailed knowledge of the Omtool Server and Autonomy iManage WorkSite.

This section includes:

[Omtool DMS Libraries integration with Autonomy iManage WorkSite](#) (I-1)

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

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

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

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

Omtool DMS Libraries integration with Autonomy iManage WorkSite

Omtool DMS Libraries v3.01 includes the ability to integrate with Autonomy iManage WorkSite.

Using Omtool DMS Libraries v3.01, you can be sure all of your important documents are stored in Autonomy iManage WorkSite. The combined power of AccuRoute Desktop and Omtool DMS Libraries v3.01 for Autonomy iManage WorkSite allows your users to send both soft copy and hard copy documents to Autonomy iManage WorkSite quickly and easily.

Best of all, there is no learning curve for your users—Omtool DMS Libraries v3.01 for Autonomy iManage WorkSite uses Autonomy iManage WorkSite's native windows and are totally familiar to your users.

For more information on profiling documents to Autonomy iManage WorkSite, go to [Section 8: Testing](#).

Installation components

Omtool DMS Libraries v3.01 is included in the AccuRoute v3.01 installation.

Note The instructions in this guide are applicable only if you are running Omtool DMS Libraries v 3.01.

Deployment summary

To deploy Omtool DMS Libraries v3.01 for Autonomy iManage WorkSite:

- 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 Complete any optional billing configuration. (Go to [Section 7: Optional billing configuration.](#))
- 6 Test profiling a document into Autonomy iManage WorkSite. (Go to [Section 8: Testing.](#))
- 7 Troubleshoot the installation. (Go to [Section 9: Troubleshooting.](#))

Release notes

Enhancements

Omtool DMS Libraries v3.01 for Autonomy iManage WorkSite includes the following enhancements:

- Autonomy iManage WorkSite v8.5 is now supported.
- Omtool DMS Libraries v3.01 for Autonomy iManage WorkSite has been qualified with AccuRoute Desktop v2.2.3 or higher.
- Declare as record feature - The Omtool Server Administrator when configuring the AccuRoute Connector for WorkSite now has the ability to specify whether the AccuRoute workspace environment should integrate with the Autonomy Records Manager or not. For more information, see [Declare as record](#) (3-6).

Resolutions

Omtool DMS Libraries v3.01 for Autonomy iManage WorkSite include the following resolved issues.

- AccuRoute Desktop was not deleting temporary files (called “stub documents”), from some DMS applications. 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. See Knowledge Base Article K03889.
- When using Autonomy iManage Desksite and Autonomy iManage WorkSite server with impersonation passwords enabled, the iManage connector failed to route documents to the DMS application. The error code in the journal of the message was Access Denied (0x80004005), however, there was no error event generated in the Application Event Log. See Knowledge Base Article K03596.

Limitations

Omtool DMS Libraries v3.01 for Autonomy iManage WorkSite has no known limitations.

Related documentation

- AccuRoute Desktop Installation Guide - <http://www.omtool.com/documentation/AccuRoute/v3.01/AccuRouteDesktop/AccuRouteDesktopInstallGuide.pdf>
- AccuRoute Desktop Users Guide - <http://www.omtool.com/documentation/AccuRoute/v3.01/AccuRouteDesktop/AccuRouteDesktopUserGuide.pdf>
- Quick Start Guide -
 - Sending a message to WorkSite using AccuRoute Desktop and the Standard Profile Dialog - <http://www.omtool.com/documentation/dmslibraries/v3.01/WorkSite/OmtoolDMSLibrariesV301WorksiteStandardQuickStartGuide.pdf>
 - Sending a message to WorkSite using AccuRoute Desktop and the Enhanced Profile Dialog - <http://www.omtool.com/documentation/dmslibraries/v3.01/WorkSite/OmtoolDMSLibrariesV301WorkSiteEnhancedQuickStartGuide.pdf>
- Omtool Server Administrator Help - <http://www.omtool.com/documentation/omtoolserver/v37/admin/index.htm>

Section 2: Requirements

This section includes:

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

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

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

Server requirements

The system where you install the AccuRoute Connector for WorkSite must meet the following minimum requirements:

AccuRoute v3.01

Note Currently, the Omtool DMS Libraries v3.01 are only available with the AccuRoute v3.01 server and client installations. The Omtool DMS Libraries v3.01 will be available as a separate download in the future.

- Autonomy iManage WorkSite v8.5 / 8.3 / v8.2 / v8.1
- Autonomy iManage WorkSite installed on the Omtool Server must not integrate with Microsoft Word.
- Tier 2 DMS connector license

Client requirements

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

- AccuRoute Desktop v2.2.3 or higher
- WorkSite Client (DeskSite or FileSite) must be installed

Supported Autonomy versions

Supported Autonomy iManage WorkSite versions are:

- Autonomy iManage WorkSite v8.5 / 8.3 / v8.2 / v8.1

The following Autonomy iManage WorkSite client versions are supported:

- DeskSite v8.5 / 8.3 / v8.2 / v8.1
- FileSite v8.5 / 8.3 / v8.2 / v8.1

Section 3: Installation

This section includes:

- [Configuring the impersonation password \(AccuRoute environments only\)](#) (3-1)
- [Adding the AccuRoute Connector for DMS WorkSite](#) (3-2)
- [Completing the AccuRoute Connector for DMS WorkSite configuration](#) (3-4)
- [Upgrading an existing iManage connector to AccuRoute Connector for DMS WorkSite](#) (3-7)

Configuring the impersonation password (AccuRoute environments only)

Autonomy iManage WorkSite supports using an impersonation password. You must configure an impersonation password on the WorkSite server and configure the Omtool DMS Libraries on the AccuRoute Server to use the impersonation password when logging in to the WorkSite server. (The impersonation password becomes critical when the AccuRoute Server cannot obtain the WorkSite login credentials of the AccuRoute Desktop user. This is always the case when the WorkSite server accepts trusted authentication.) When the AccuRoute Server uses the impersonation password configured on the WorkSite server, the AccuRoute Server can route documents to the WorkSite server on behalf of AccuRoute Desktop users.

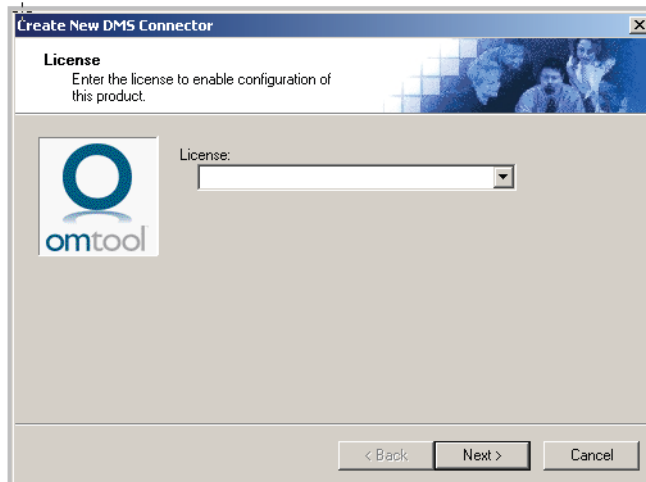
To configure the impersonation password:

- 1 Start the Service Manager for the WorkSite server.
- 2 Select a WorkSite server, click **PROPERTIES** on the menu bar, and select **SERVICE PROPERTIES**.
- 3 Go to the **SECURITY** section, select **ENABLE IMPERSONATION**, type the impersonation password in the **PASSWORD** text box, and click **OK**.
- 4 Reboot the WorkSite server.

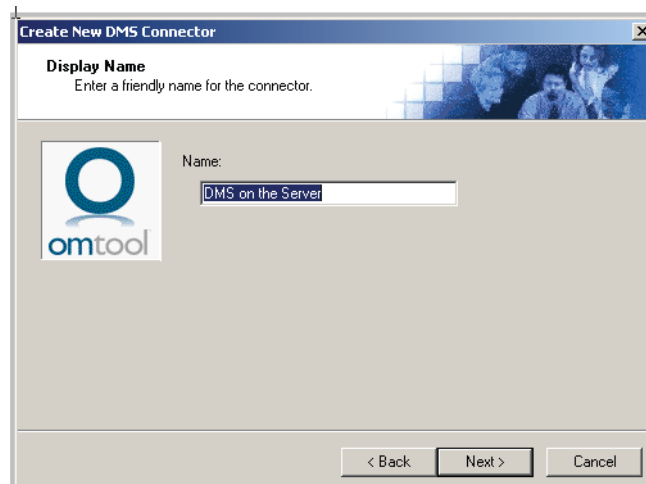
Adding the AccuRoute Connector for DMS WorkSite

To add the **AccuRoute Connector for DMS WorkSite** to an **AccuRoute Server**:

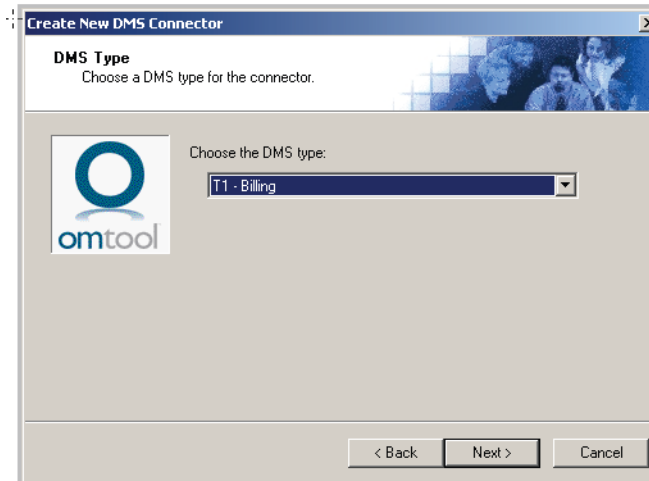
- 1 Right-click **CONNECTORS** in the console tree and select **NEW > DMS**. The License window opens.



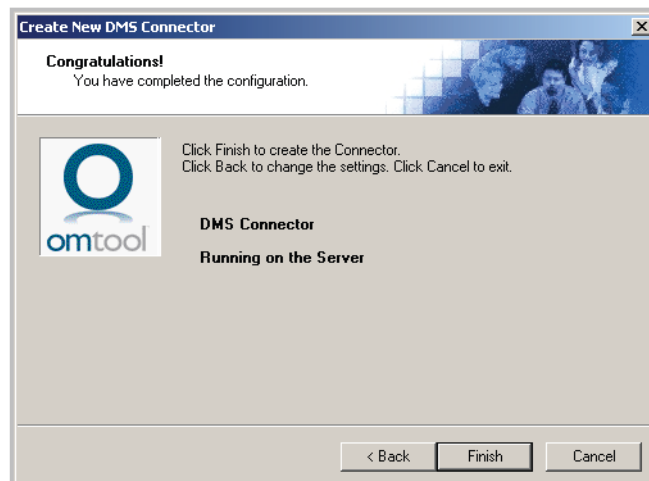
- 2 In the **LICENSE** text box, enter the license key for the AccuRoute Connector for WorkSite and click **NEXT**. The Display Name window opens.



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



- 4 From the Choose the DMS Type drop down, select **T2 - WORKSITE** from the drop-down list and click **NEXT**. Connector configuration is now complete and the **Congratulations** window opens.



- 5 Click **FINISH**.
The DMS configuration wizard launches and prompts you to configure the connector to support WorkSite.

Completing the AccuRoute Connector for DMS WorkSite configuration

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

[Configuring a new AccuRoute Connector for WorkSite](#) (3-4)

[Configuring an existing AccuRoute Connector for DMS WorkSite](#) (3-7)

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

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

Configuring a new AccuRoute Connector for WorkSite

The WorkSite Login Configuration window opens immediately after you complete the new connector wizard.

WorkSite Login Configuration

DMS Configuration
Enter configuration options.

Server name:

Please specify the Login information

User name:

Password:

Use Trusted Login Note: Using an impersonation password will allow the connector to properly store documents as the original WorkSite user that generated the request.

< Back Next > Cancel

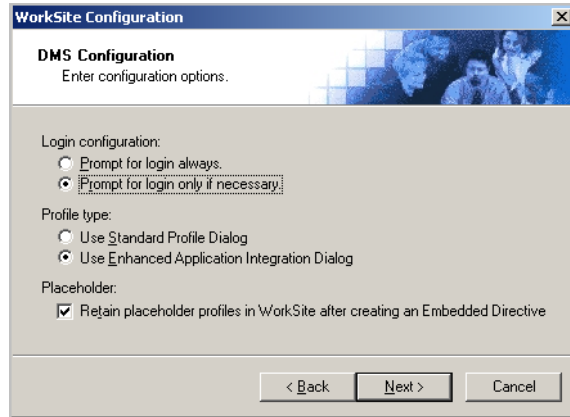
To complete the configuration wizard:

- I In the **SERVER NAME** text box, enter the WorkSite server name.

If you are configuring the AccuRoute Connector for WorkSite 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.

Leave this field blank if you want WorkSite to prompt the Omtool user to select a server. (This is recommended for users who save documents to more than one server.)

- 2 In the **USERNAME** and **PASSWORD** text boxes, enter the user name and the password to use when connecting with the WorkSite.
- 3 Click **NEXT**.



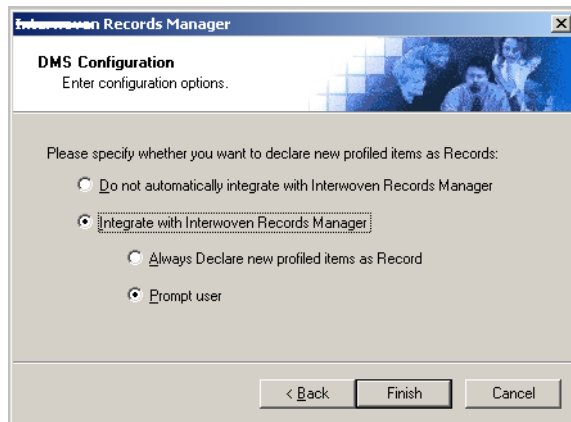
- 4 Select from the following authentication option:
 - **PROMPT FOR LOGIN ALWAYS** - Select this option if the WorkSite server should always prompt the Omtool user for WorkSite login credentials.
 - **PROMPT FOR LOGIN ONLY IF NECESSARY** - Select this option if the WorkSite server should prompt the Omtool user for WorkSite login credentials only when necessary.

If you are configuring the DMS connector 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.

- 5 In the **Profile type** section, select from **USE STANDARD PROFILE DIALOG** and **USE ENHANCED APPLICATION INTEGRATION DIALOG** options.
- 6 In the Placeholder section, verify the check box beside **RETAIN PLACEHOLDER PROFILES IN WORKSITE AFTER CREATING AN EMBEDDED DIRECTIVE** is selected by default.

When selected, this option retains the placeholder profile in WorkSite when the user adds a new WorkSite destination. If you clear this selection, the placeholder profile is deleted after the new WorkSite destination is added to AccuRoute Desktop.

- 7 Click **NEXT**. The **Records Manager** configuration page opens.



- 8 Specify if you want integration with Records Manager or not.
- If you want to specify integration with Records Manager, check the box beside **INTEGRATE WITH INTERWOVEN RECORDS MANAGER**.
 - If you do not the integration, check the box beside **DO NOT AUTOMATICALLY INTEGRATE WITH INTERWOVEN RECORDS MANAGER** and go to step 10.
- 9 Choose from the following options:
- the profiled documents from an AccuRoute Desktop application should automatically be marked as a record
 - the user should be prompted in AccuRoute Desktop to specify whether the profiled document is a record
- 10 Click **FINISH**.

Declare as record

The Administrator of the Autonomy iManage WorkSite document management system can designate chosen profiled documents as records. These records cannot be modified or deleted and appear with a lock icon in the DeskSite or FileSite workspace. In short, once a document is designated as a record, it is preserved forever.

The Omtool Server Administrator when configuring the AccuRoute Connector for DMS WorkSite has the ability to specify whether the AccuRoute workspace environment should integrate with the Autonomy Records Manager or not. For configuration instructions, see step 8-10 of [Configuring a new AccuRoute Connector for WorkSite](#)

Configuring an existing AccuRoute Connector for DMS WorkSite

To complete the configuration wizard for an existing connector:

- 1 Click **CONNECTORS** in the console tree, and double-click the **AccuRoute Connector for WorkSite** in the details pane.
- 2 Click the **ADVANCED** tab.
- 3 Locate the **DMS CONFIGURATION** section, and click **CONFIGURE**. The WorkSite Login Configuration window opens.
- 4 Perform steps one through eight in [Configuring a new AccuRoute Connector for WorkSite](#) (3-4).

Upgrading an existing iManage connector to AccuRoute Connector for DMS WorkSite

Use the following procedure to upgrade your existing iManage connector to AccuRoute Connector for WorkSite.

Note Contact Omtool Customer Service for a new Tier 2 License code for the WorkSite integration.

To upgrade the iManage connector:

- 1 Rename the existing iManage DMS connector **ROUTING IDENTIFIER** to “Old iManage”.
- 2 Rename the new WorkSite DMS connector **ROUTING IDENTIFIER** to “iManage”. Verify that old Embedded Directives created using the iManage DMS connector now successfully route to the new AccuRoute Connector for WorkSite.
- 3 Change the server configuration so that billing lookup and validation is done against the AccuRoute Connector for WorkSite instead of the iManage DMS connector.
- 4 Change the configuration for Registered Users to enable use of the AccuRoute Connector for WorkSite and disable use of the iManage DMS connector.
- 5 Send a test message using the new AccuRoute Connector for WorkSite. (Go to [Section 8: Testing](#).)
- 6 Delete the old iManage DMS connector.

Note To ensure that old routing sheets work with the new connector do not use the new connector until it's routing identifier is named to match the original name.

Section 4: Required server configuration

This section includes:

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

Enabling Autonomy iManage WorkSite as a recipient type in AccuRoute Desktop

If you have added support for Autonomy iManage WorkSite and you want to make it available to users as a recipient type in AccuRoute Desktop, you must modify the AccuRoute properties of the user Group.

To enable Autonomy iManage WorkSite as a recipient type in AccuRoute Desktop:

- 1 Open the Omtool Server Administrator.
- 2 Expand the **Configuration** node and go to the **Groups** node.
- 3 Select the Group for whom you want to add WorkSite as a recipient type and open the Group properties page.
- 4 Go to the **ACCURROUTE** tab.
- 5 Select the **ENABLE MEMBERS OF THIS GROUP AS ACCURROUTE USERS** option.
- 6 In the **Allow group to route to** section, check the box beside **WORKSITE**.
- 7 Click **OK** to save your changes.

Now when you start AccuRoute Desktop, Autonomy iManage WorkSite is available as a recipient in AccuRoute Desktop.

Section 4: Required server configuration

Section 5: Optional server configuration

This section includes:

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

[Configuring document link](#) (5-3)

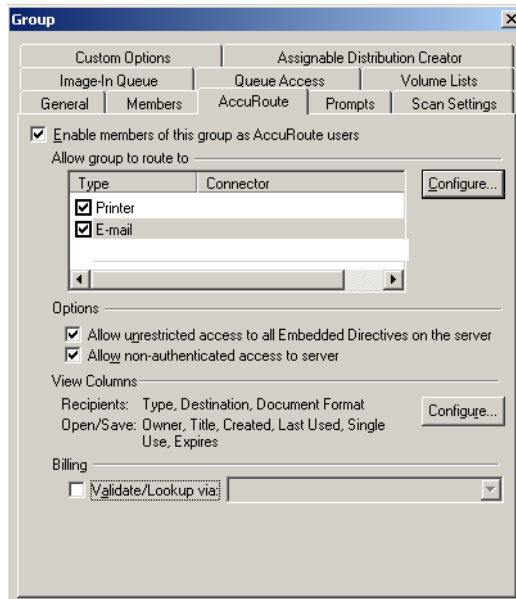
Changing the label of a document

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 the Groups node.

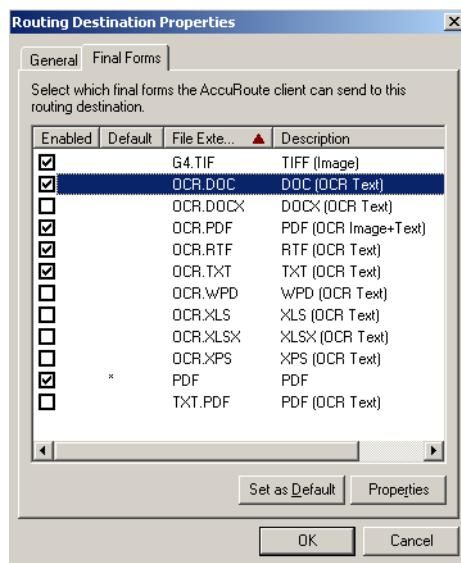
To change the label of a document type

- 1 Open the Omtool Server Administrator and expand the Configuration node.
- 2 Go to the **Groups** node under **Configuration** and select the Group for whom you want to configure the document label.
- 3 Open the Group **Properties** page.

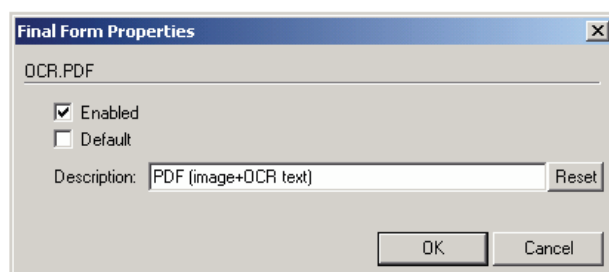
- 4 Click the **ACCURoute** tab.
- 5 Highlight an item in the **ALLOW USER TO ROUTE TO** list.



- 6 Click **CONFIGURE** to open the **Routing Destination Properties** page and then click the **FINAL FORMS** tab.
- 7 Highlight the document type that needs to be modified.



- 8 Click **PROPERTIES**. The **Final Form Properties** page opens.
- 9 In the **DESCRIPTION** field, enter the new label for this document type.



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

Configuring document link

This section includes:

[Installing the AccuRoute Web Client](#) (5-3)

[Defining an outbound rule](#) (5-4)

[Customizing the notification template](#) (5-4)

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

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

- AccuRoute Server v3.01
- AccuRoute Desktop v2.2.3 or higher
- Internet Information Service (IIS)
- AccuRoute Web Client

Note When creating a Routing Sheet, you must configure the message Options to include an Email notification.

Installing the AccuRoute Web Client

If you are not already using the AccuRoute Web Client, you will need to install it before you can generate confirmation email that include an active link.

For detailed instructions for deploying the AccuRoute Web Client, consult the [AccuRoute Web Client Installation Guide](#).

Defining an outbound rule

Generating a confirmation e-mail that contains a document link utilizes the AccuRoute Connector for SMTP. In order to use this feature, make sure one of the following rules is defined in your list of Outbound Rules:

- If Destination is an e-mail address is * then Route to SMTP on the server
- All e-mail to SMTP on the Server - Created by Connector Wizard

Note If one of the above rules doesn't exist, you need to create one of them. For instructions on how to create rules, see [About routing rules](#) and associated topics in Omtool Server Administrator help.

Customizing the notification template

In order to build the notification message, you need to customize the AccuRoute notification template.

Note The document link only works for the originator of the message. When multiple recipients are selected for the notification, the other recipients will see the following message when attempting to view the document:

```
Invalid JobID specified
The fax may have been deleted, or you may not be
authorized to view that fax.
[UserEmail = 'administrator@stress.omtool.com'
FaxOwner= 'jdm@documentation.omtool.com']
```

To customize the AccuRoute template:

- 1 Use Wordpad to open the following file:
...\\OMTOOL\\OMTOOLSERVER\\LANGUAGES\\ENU\\TEMPLATES\\OMNOTIFICATION-SUCCESS.OMTPL
- 2 Add the following line to this file. You can add the line anywhere.
`http://Your AccuRoute Server name/Your Virtual Directory name/ LaunchDMS.asp?jobID=%JOB_ID%`
- 3 Replace Your AccuRoute Server name with the actual name of your AccuRoute Server.
- 4 Save and close the template notification file.

The following example shows a sample of the template notification file configured to generate a confirmation email containing a document link:

```
The message you sent to %RECIP_NAME% at %DESTINATION%, was delivered successfully
on %DATE_DELIVERED% at%TIME_DELIVERED%

JobID: %JOB_ID%

Open the Document: http://Your AccuRoute Server name/Your Virtual Directory name/
LaunchDMS.asp?jobID=%JOB_ID%

FaxID: %FAX_PAGE1%
```


Section 6: Client configuration

This section includes:

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

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

Configuring AccuRoute Desktop

To add Autonomy iManage WorkSite as a recipient to AccuRoute Desktop:

- 1 Start AccuRoute Desktop and log in.
- 2 On the menu bar, click **TOOLS > CONFIGURE DMS**.
- 3 Select **WORKSITE** from the list that opens.

At this point, the configuration is identical to that of the connector configuration. Follow the instructions in the procedure [Configuring a new AccuRoute Connector for WorkSite](#) (3-4).

Client deployment methods

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

- Configure AccuRoute Desktop to support WorkSite 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. below
- Install AccuRoute Desktop on each individual workstation and perform the configuration steps for WorkSite manually.

Configuring WorkSite 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 WorkSite manually after you install AccuRoute Desktop.

To pre-configure the Omtool DMS Libraries for deployment:

- 1 Install AccuRoute Desktop v2.2.3 or higher on a workstation.
- 2 Configure the Omtool DMS Libraries to support WorkSite. Select the settings that should apply to all workstations in your environment.
- 3 Navigate 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 Navigate 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 WorkSite. When you are ready to deploy WorkSite, launch **SETUP.EXE** in the AccuRoute Desktop directory.

Configuring WorkSite manually

To configure WorkSite manually:

AccuRoute Desktop - Go to [Section 6: Configuring AccuRoute Desktop](#). 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 users in a Group](#) (7-2)

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

To use billing when profiling your WorkSite message, enable billing on the AccuRoute Connector for WorkSite, and then enable it for users of a Group.

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 AccuRoute Connector for WorkSite:

- 1 Click **CONNECTORS** in the console tree, and double-click the AccuRoute Connector for WorkSite 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 users in a Group

After you enable billing on the AccuRoute Connector for DMS WorkSite, you need to enable billing for the users in a Group.

To enable Billing for users in a Group:

- 1 Start the Omtool Server Administrator.
- 2 Expand the **Configuration** node and go to the **Groups** node.
- 3 Select the Group for whom you want to add Autonomy iManage WorkSite as a recipient type and open the Group properties page.
- 4 Go to the **ACCURROUTE** tab.
- 5 Click the **ACCURROUTE** tab.
- 6 Select **VALIDATE/LOOKUP VIA**, then select the **WorkSite** connector from the drop-down list.
- 7 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 with:

- AccuRoute Server v3.01
- AccuRoute Desktop v2.2.3 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:

[Standard profile dialog \(8-1\)](#)

[Enhanced profile dialog \(8-4\)](#)

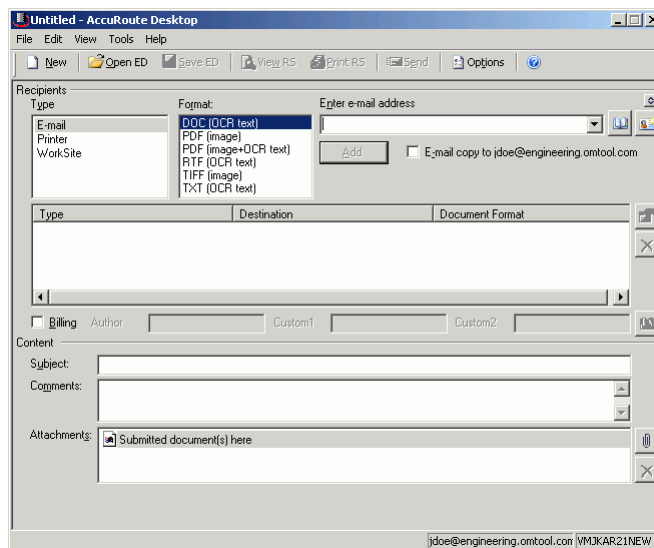
To test the installation and configuration of Omtool DMS Libraries v2.2 for WorkSite, send a message using AccuRoute Desktop. Autonomy iManage WorkSite includes two options, the Enhanced Profile Dialog and the Standard Profile Dialog.

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

Standard profile dialog

To send a message to Autonomy iManage WorkSite using AccuRoute Desktop:

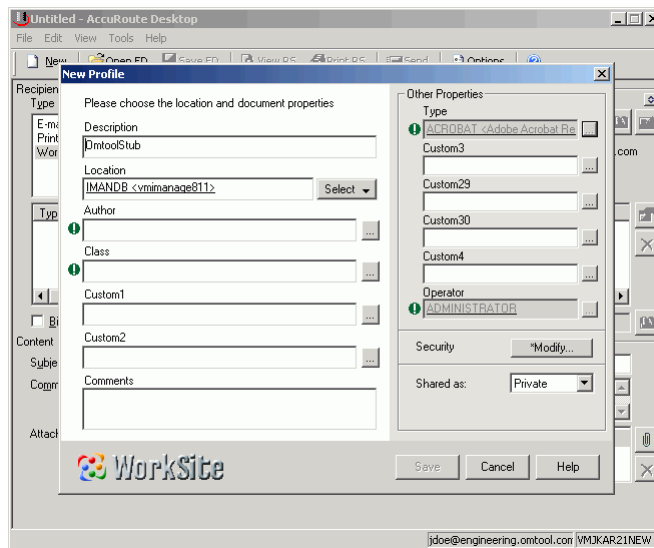
- 1 Start AccuRoute Desktop. Click **START**, go to the Omtool programs group, and select **ACCURROUTE DESKTOP**. Log in if prompted. The application appears on your desktop.



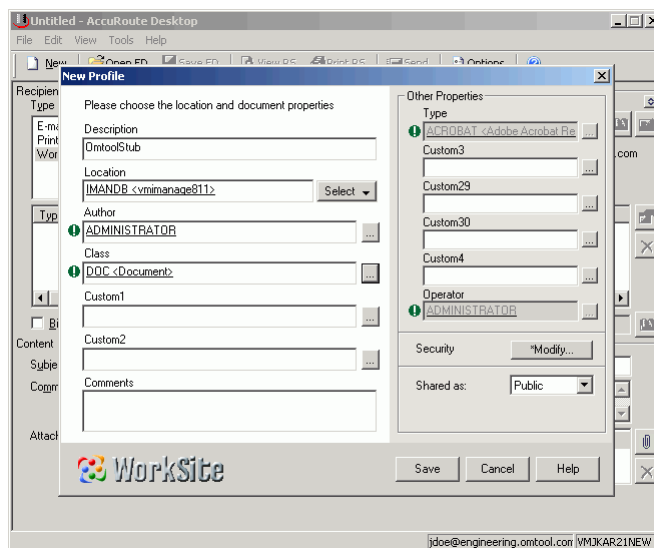
- 2 Select the destination type **WORKSITE** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.

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

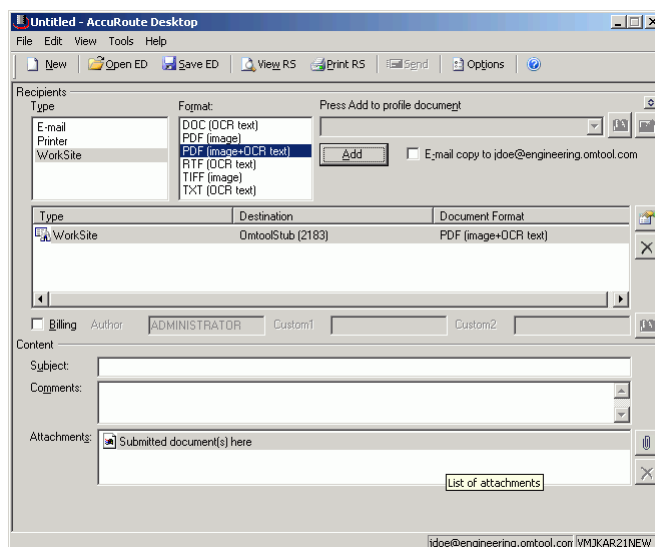
3 Click **ADD**. The New Profile window opens.



4 Enter the required fields.



- 5 Enter any optional information if desired and click **SAVE**. An OmtoolStub destination appears in the message.

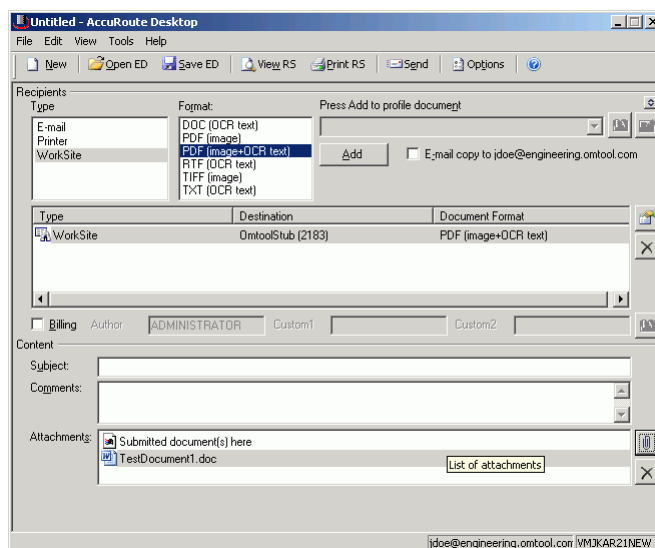


For information on using billing, consult the AccuRoute Desktop User Guide or consult your system administrator.

- 6 Add content to your message.
- Locate the **CONTENT** section at the bottom and type a subject and comments.
 - 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

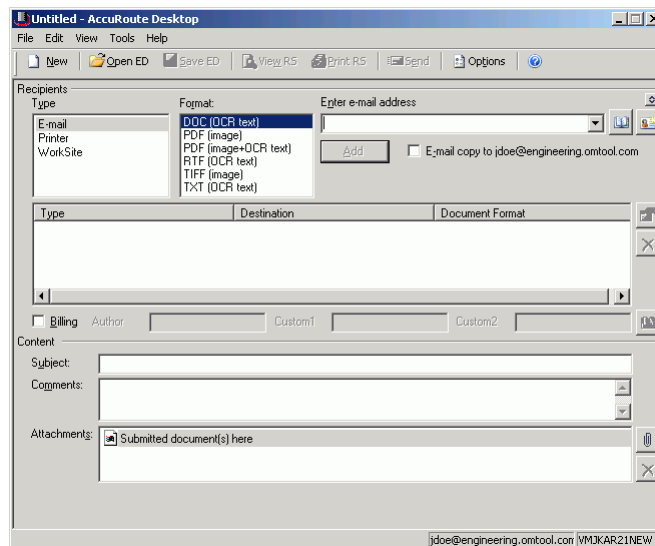
Directive - Click **SAVE ED** on the toolbar, type a title for the Embedded Directive, and click **SAVE**.

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.)

Enhanced profile dialog

To send a message to Autonomy iManage WorkSite using AccuRoute Desktop:

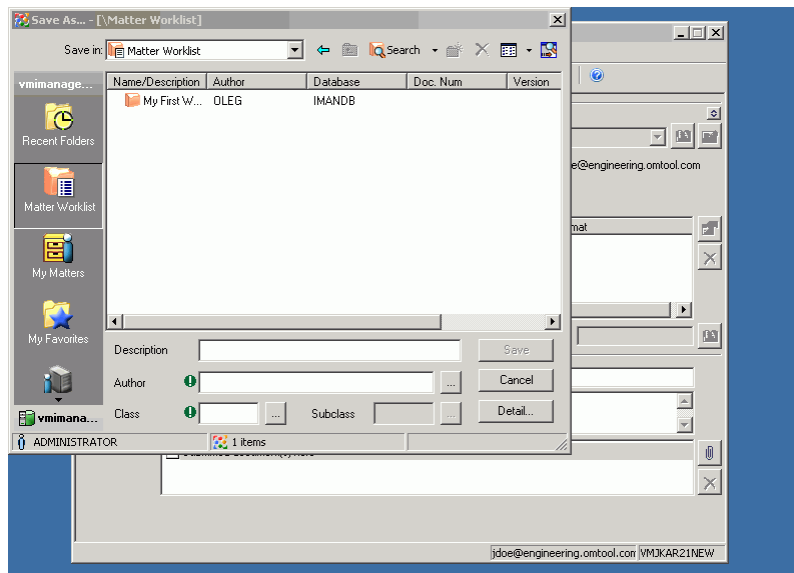
- 1 Start AccuRoute Desktop. Click **START**, go to the Omtool programs group, and select **ACCURROUTE DESKTOP**. Log in if prompted. The application appears on your desktop.



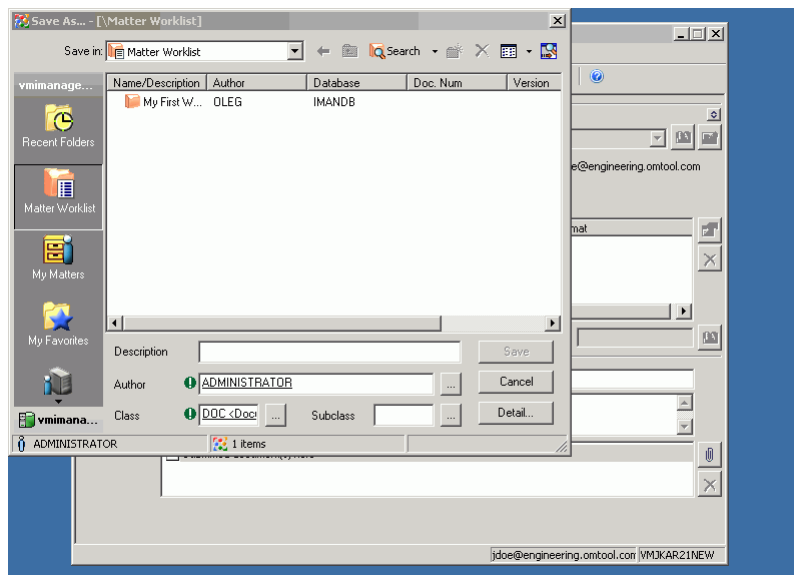
- 2 Select the destination type **WORKSITE** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.

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

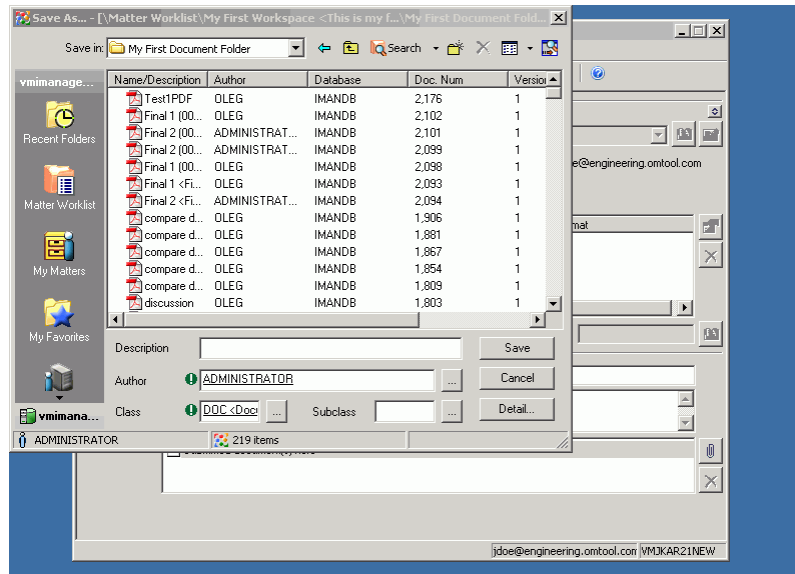
- 3 Click **ADD**. The **SAVE AS [MATTER WORKLIST]** window opens.



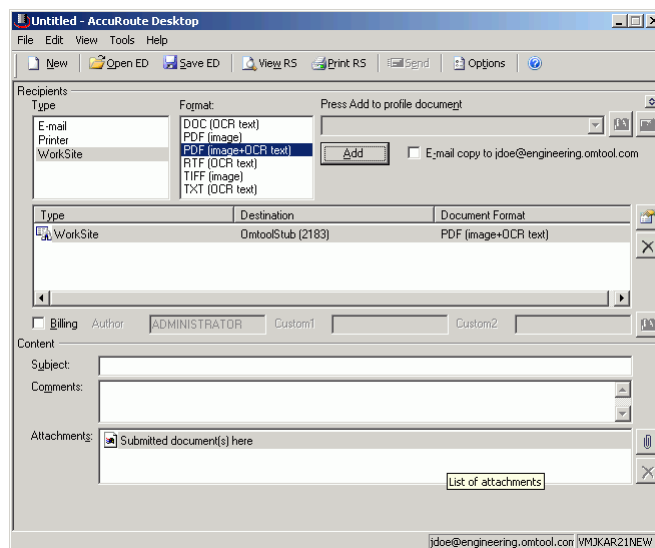
- 4 Enter **AUTHOR** and **CLASS** (required fields).



- 5 Double click the worklist and subsequent folders until you reach the desired location for your document and then click **SAVE**.



- 6 Complete any optional information if desired and click **SAVE**. An OmtoolStub destination appears in the message.

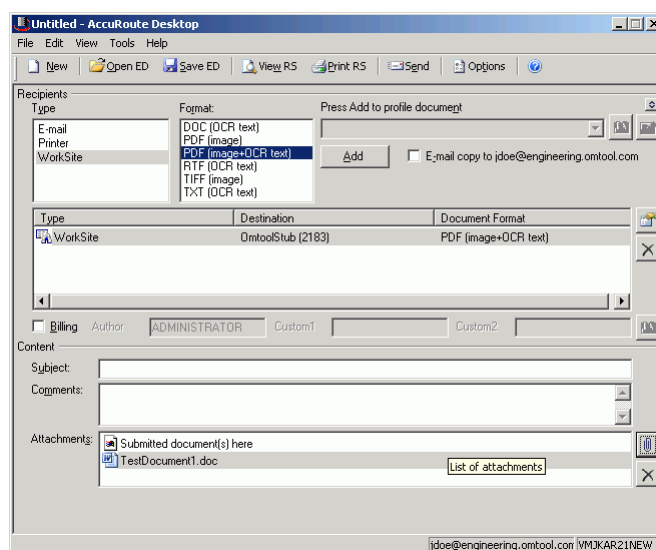


For information on using billing, consult the AccuRoute Desktop User Guide or your system administrator.

- 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 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 Support](#).

Detecting workflow issues

After a document has been profiled to WorkSite, 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 WorkSite, 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 WorkSite. Do some basic troubleshooting on WorkSite. If WorkSite is functioning correctly, troubleshoot the message on the Omtool Server.

For information on troubleshooting WorkSite, consult WorkSite'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:

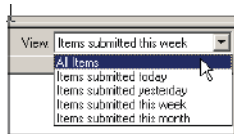
Section 9: Troubleshooting

- 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:

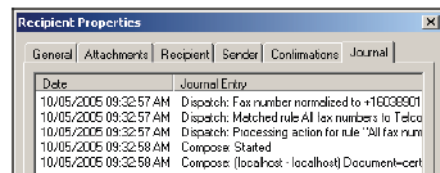
- 1 Start the Omtool Server Administrator.
- 2 Go to **OMTOOL SERVER ADMINISTRATOR > [SERVERNAME] > MESSAGES.**
- 3 Look for the message in the **In Process** queue:
 - a Click **IN PROCESS.**
 - b View **ALL ITEMS.**



- 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.

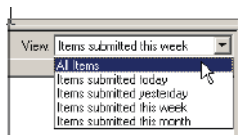
Note If you open the Journal while the message is still processing, you need to close the Journal properties before the Journal will update.

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

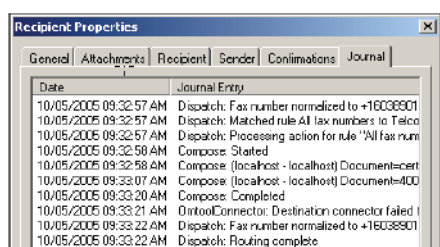


- **Message not found** - Go to step 4 and look for the message in the History queue.

- 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 Support](#), 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 WorkSite successfully. Do some advanced troubleshooting on WorkSite to determine why the message is not being delivered to its destination. Contact [Omtool Support](#), 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 WorkSite. If you are able to send messages to recipients other than WorkSite and WorkSite is operating correctly, contact [Omtool Support](#).