
AccuRoute[®] v4.0

Release Notes

Product: AccuRoute 4.0
Release date: February 2013
Version 053113 1510



Omtool, Ltd.

6 Riverside Drive
Andover, MA 01810
Phone: +1/1 978 327 5700
Toll-free in the US: +1/1 800 886 7845
Fax: +1/1 978 659 1300

Omtool Europe

25 Southampton Buildings
London
WC2A 1AL
United Kingdom
Phone: +44/0 20 3043 8580
Toll-free in the UK: +44/0 80 0011 2981
Fax: +44/0 20 3043 8581

Web: <http://www.omtool.com>

© 2013 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

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

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

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

Omtool support and sales

Online resources

The Omtool web site provides you with 24-hour access to documentation, software updates and other downloads, and detailed technical information that can help you troubleshoot issues. Go to <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:** +1/1 978 327 6800 or +1/1 888 303 8098 (toll-free in the US)
- **Fax:** +1/1 978 659 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:** +1/1 978 327 5700 or +1/1 800 886 7845 (toll-free in the US)
- **Fax:** +1/1 978 659 1300
- **E-mail:** sales@omtool.com

Summary of Features

Release Notes contain information on new features, enhancements, resolutions, and limitations for AccuRoute v4.0.

AccuRoute server updates

The following is a summary of AccuRoute server features specific to AccuRoute v4.0.

	Features	
License Activation	Activating the AccuRoute server license (5)	
Device Management	Device management using the AccuRoute Server Administrator (5)	
Web Client Interface Management	Web Client management using the AccuRoute Server Administrator (6)	
Configuration node	Document Stamps (6)	
	Properties	Enhancement to the Image-In Connect (IIC) node: Apply property formatting (7)
		Creating Property Formatter (7)
		Configuring a Meditech Validator (9)
	Group Permissions	Capturing and using credentials (11)
		Defining a default fax cover page for group use when sending a fax message (11)
		Specifying job properties for a message when it is sent from a group member (12)
		Setting the destinations to which a group member can (and cannot) send messages (12)
		Configuring Group permissions to allow the user to view Administrator options for the Destination Translation Table (DTT) in the AccuRoute Web Client (13)
Connectors	SMTP connector setting for Mail Interceptor (14)	
	Fax Service connector to route documents to Fax Service Providers (15)	
	Meditech connector to support the Meditech Validator (17)	
	Universal Input connector (18)	
	Universal Output connector (19)	
	DMS connectors (23)	

	Features	
Components	Data validation enhancements (25)	
	Collection Locator	New AccuRoute component: Collection locator (27)
	Compose Engines	ABBYY FineReader® Engine 10.0.10.76 for OCR support (29)
		RTF Composer updates (29)
		Additional third-party Compose engine updates (30)
	Compose Features	OCR language support (30)
		PDF Forms Generator (39)
		PDF/A selectable for document conversion (41)
		Compose bypass for any file that normally would result in a failed message (41)
	Data Extractor	Configuring the Data Extractor for Forms recognition (42)
		TEXT PDF form identification and Zonal Field Extraction (43)
QR barcodes (44)		
Maintenance	Maintenance archive supports regular expressions (44)	
Image-In Queue	Enhancement to the AccuRoute component: Image-In Queue (45)	
Queues	Virtual queues (45)	
Rules	Delivery failure notification option for outbound rules (46)	
	New criteria for routing rules: Job properties match expression (46)	
Volume Lists	Enhanced logging with Volume Lists (47)	
	Volume List Extensions (48)	
	Volume List Restrictions (54)	
	Document Action Log (59)	

Omtool Client Updates

The following is a summary of Omtool Client features specific to AccuRoute v4.0.

	Features
Client versions	Client versions (59)
AccuRoute Desktop Client	AccuRoute Desktop Client (59)
AccuRoute Web Client	AccuRoute Web Client features (60)
	Destination Translation Table (DTT) (61)
	Failover as part of an AccuRoute cluster (64)
AccuRoute Client Option Packs	AccuRoute Extensions for OpenText DM (64)
	AccuRoute Extensions for ProLaw (65)
	AccuRoute Extensions for Microsoft SharePoint (65)
	AccuRoute Extensions for HP Autonomy WorkSite (66)
Image-In	Image-In Connect (67)
	Image-In Queue (69)
Print to AccuRoute	Print to AccuRoute (79)
Fax Service Provider (FSP) Receiver	Fax Service Provider (FSP) Receiver (79)
HP OXPd	HP OXPd v1.4 and v1.6 (83)

Related documentation

Documentation has been updated for AccuRoute v4.0. A complete documentation list is available online on the [AccuRoute v4.0 documentation](http://www.omtool.com/documentation/AccuRoute/4.0/documentation.htm) page at: <http://www.omtool.com/documentation/AccuRoute/4.0/documentation.htm>

Related documentation

AccuRoute Server Updates

Activating the AccuRoute server license

After installation, the server uses a 30-day demonstration license. At some point during this time, you should activate the server license. This can be accomplished:

- Automatically when you enter an activation code and the AccuRoute server is on a system that has access to the internet.
- Manually if the AccuRoute server does not have access to the internet. In this case, you will:
 - ▶ Submit and validate the activation code.
 - ▶ Create an Export file into which the activation code is copied.
 - ▶ Create an Import file and use this file for activation from a system that does have internet access.

For detailed procedures, refer to the *AccuRoute Server Installation and Integration Guide* accessed through the [AccuRoute v4.0 documentation](#) page.

Device management using the AccuRoute Server Administrator

In previous releases of AccuRoute, the system administrator completed system configuration of the device client for customized options by manually editing the device client XML configuration file. With AccuRoute v4.0, the system administrator uses the graphical user interface of the System Administrator to manage any configurable setting.

Refer to the *Embedded AccuRoute for HP OXPd Device Client 1.6 Installation and Integration Guide* accessed through the [AccuRoute v4.0 documentation](#) page.

Web Client management using the AccuRoute Server Administrator

In previous releases of AccuRoute, Web Client settings were handled through an XML configuration file. AccuRoute v4.0 provides the system administrator with the ability to configure commonly used Web Client settings using the graphical user interface of the System Administrator client. Use the Administrator Web Client Views Management tool for:

- Setting a default Routing Sheet template for the Scan to My Files feature
- Making Routing Sheet templates available for Personal and Public Distributions and setting a default template
Typically, the default Routing Sheet template for Personal and Public Distributions is different from the template used for the Scan to My Files feature
- Making fax cover page templates available and setting a default template
- Setting the tabs/folders that are enabled and visible to the user, and specifying which tab/folder is set as the default folder opened when a user opens the Web Client
- Using the OCX for Address Book browsing

Refer to the *AccuRoute Server Installation and Integration Guide* accessed through the [AccuRoute v4.0 documentation](#) page.

Configuration node

Document Stamps

A Document Stamp includes a “top line” on an internal fax. The top line is created by specifying these variables:

- **DATE** - Current date.
- **TIME** - Current time.
- **PAGE** - Individual page number.
- **PAGE_COUNT** - Total page count.

Use the following procedure to create variables that will appear in the Document Stamp.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration**.
- 3 Right-click on **Document Stamps** and select **New > Document Stamp**.
- 4 Enter a descriptive name in the **Name** text box.
- 5 Enter the stamp information (such as the following) in the **Text** section.

Text: DATE: {DATE} TIME: {TIME} PAGE {PAGE_NUMBER} of {PAGE_COUNT}

- 6 Change the font size (such as from the default to 11 point). Optionally, configure the font type, color, location, and alignment.
- 7 Click **OK** to complete the configuration.

Note Document Stamps are applied to faxes that route to a device, based on a match in the Destination Translation Table (DTT). See the AccuRoute Web Client **Administration** tab features to create a DTT entry that has the Document Stamp applied to it. See [Creating the DTT Table \(adding devices\) \(62\)](#).

Validators

The **Validators** node was removed as a node from the AccuRoute Server Administrator and functionality was added to **Properties**.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration**.
- 3 To modify an existing property, click **Properties** and then double-click on the property name.
Or, to create a new property, right-click on **Properties** and select **New > Property Dictionary**. Enter information for the new property on the **General** tab.
- 4 Click the **Validation** tab and configure the validator.

The validator name is automatically set to the name of the property. If the property is deleted, the validator is deleted. A validator is unique to a property (you cannot assign the same validator to multiple properties).

Note You cannot change an ADO validator to a Meditech validator. Instead, you need to delete and recreate the property.

Properties

Enhancement to the Image-In Connect (IIC) node: Apply property formatting

When the scraped data in Image-In Connect is associated to a pre-configured property, the configured property formatter will be applied to the property before storing the data.

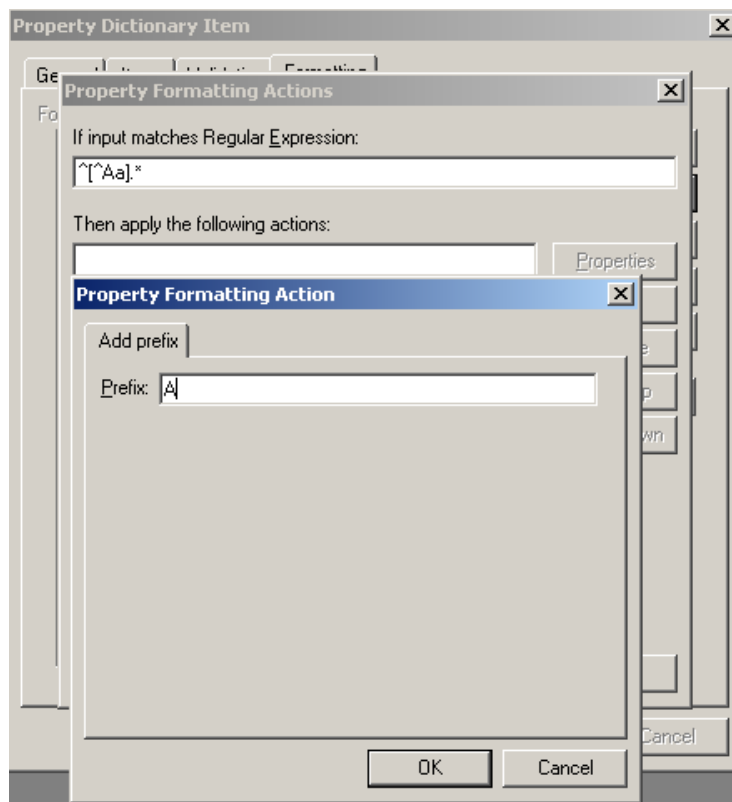
Note If there are configured prompts for the selected action then the user entered data will be formatted according to the property formatting definition.

Creating Property Formatter

The formatter is applied before validation. The customer information stored in the SQL database are validated according to the formatter set for an AccuRoute property. Follow the instructions below to add the Prefix formatter type.

For example, if you want to validate your customer number so that each begins with the letter “A,” you might follow this procedure to add the Prefix formatter type:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration > Properties**.
- 3 Double-click the **Customer Number** property. (It is assumed that this property was already created.)
- 4 Click the **Formatting** tab and click the **New** button.
- 5 In the **If input matches Regular Expression** text box, enter:
`^[^Aa].*`
- 6 Click the **New** button.
- 7 Select **Add prefix** from the drop-down.
- 8 Enter **A** for the prefix.



- 9 Click **OK**.
- 10 Click **OK** and then **OK** again to complete the configuration.
The prefix is added as **A** for the customer number AccuRoute property.

Configuring a Meditech Validator

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration**.
- 3 To modify an existing property, click **Properties** and then double-click on the property name.
Or, to create a new property, right-click on **Properties** and select **New > Property Dictionary**. Enter information for the new property on the **General** tab.
- 4 Click the **Validation** tab.
- 5 Select the **Validate** option.
- 6 Select **Use Server Validation** and click the **Configure Server Validation** button.
- 7 From the drop-down, select **Meditech Magic Validator** and click **OK**. The **Validation Properties** page opens.
- 8 Click the **MEDITECH** tab.

The **Connector** drop-down is populated with the name of a configured Omtool Healthcare Suite Connector for Meditech.

Note If there is more than one, they will all be listed in the drop-down.

- 9 For the **Environment** drop-down, the contents will depend on the connector selection in Step 7. A typical Meditech connector will be configured with both a **Test** and **Live (Production)** environment. The image below shows a configuration for the **Test** environment.
- 10 For the **Account Number**, select the corresponding property from the drop-down list.
- 11 For the **Medical Record No**, select the corresponding property from the drop-down list.

Note **Account Number** and **Medical Record No** must be selected.

- 12 Optionally, go to the **Additional properties** section and select other relevant patient information properties. The available options include patient name and patient date of birth.

Note Additional properties are used as return values only and may be omitted

- If you do not want to map any additional property, click in the property text box and delete the contents.

The screenshot shows a dialog box titled "Validation Properties" with a close button (X) in the top right corner. The "General" tab is selected, and the "MEDITECH" connector is chosen. The "Connector" dropdown is set to "MEDITECH on the Server", and the "Environment" dropdown is set to "test". The "Account Number" dropdown is set to "AccountNo", and the "Medical Record No." dropdown is set to "MedRecNo". Below these, the "Additional Properties" section contains four dropdowns: "Name" set to "PatientName", "Date of Birth" set to "DOB", "Sex" set to "FormDescription", and "Date of Service" set to "ServiceDate". A "Test" button is located at the bottom right of the "Additional Properties" section. At the bottom of the dialog box are "OK", "Cancel", and "Help" buttons.

- To test the configuration, click **Test**. This enables you to enter Account and Medical Record values to query. Results displayed will include any configured return values.
- Click **OK** to save your changes.

Group permissions

Updates to Group permissions include:

- [Capturing and using credentials](#) (11).
- [Defining a default fax cover page for group use when sending a fax message](#) (11).
- [Specifying job properties for a message when it is sent from a group member](#) (12).
- [Setting the destinations to which a group member can \(and cannot\) send messages](#) (12). By default, all destinations (E-mail, Fax, Folder, Printer, etc.) are selected.
- [Configuring Group permissions to allow the user to view Administrator options for the Destination Translation Table \(DTT\) in the AccuRoute Web Client](#) (13).

Capturing and using credentials

In certain capture scenarios it is desirable for the AccuRoute server to impersonate the user who has submitted the document for processing when uploading that document to network storage. When a user logs into a device and provides both a network user name and password, the AccuRoute device client captures those credentials in a secure manner and passes them to the AccuRoute server. The server can then use the credentials to log in as that user when uploading the delivered document to a network folder.

Note Capture and use of login credentials requires configuration for the device buttons as well as the correct permissions for the account used in delivering to the network storage.

Defining a default fax cover page for group use when sending a fax message

You can indicate that members of a group will use a specific fax cover page when sending a fax message.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration**.
- 3 Double-click on an existing group name.
Or, to create a new group, right-click on **Groups** and select **New > Group**. Enter information for the new group.
- 4 Click the **Fax Cover Pages** tab.
- 5 Select the **Enable members of this group to use the selected fax cover pages** option.
- 6 Click **Add**.
- 7 Select a template as the cover page, then click **OK**.
- 8 Check the box next to the file name to set it as the default cover page.
- 9 Optionally, you can require that members of this group must specify a fax cover page (by selecting the option at the bottom of the page).

Note If you select this option but do not set a default fax cover page, a warning message will display when a member of the group sends a fax message.

- 10 Click **OK**.

Specifying job properties for a message when it is sent from a group member

You can specify that a job property (including value and type) will be applied to a message when it is sent from a user who is member of a group.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration**.
- 3 Double-click on an existing group name.
Or, to create a new group, right-click on **Groups** and select **New > Group**. Enter information for the new group.
- 4 Click the **Job Properties** tab.
- 5 Select the **Enable members of this group to receive the specified job properties** option.
- 6 Click **Add**.
- 7 Click the browse (...) button for the **OPath** and then select a property dictionary field. Click **OK**. The job property path appears in the OPath field.
- 8 Enter a **Value** and select a **Type**, as appropriate.
- 9 Optionally, you can select the option to override this job property if the job already has this property set.
- 10 Click **OK**.
- 11 Click **OK** again.

Setting the destinations to which a group member can (and cannot) send messages

By default, all destinations (E-mail, Fax, Folder, Printer, etc.) are selected.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration**.
- 3 Double-click on an existing group name.
Or, to create a new group, right-click on **Groups** and select **New > Group**. Enter information for the new group.
- 4 Click the **Destinations** tab.
- 5 Select the **Enable members of this group for specific destinations only** option.
- 6 Deselect (uncheck) destinations, as appropriate. When a destination is not checked, a member of the group will not be able to send a message to that destination.
- 7 Click **OK**.

Configuring Group permissions to allow the user to view Administrator options for the Destination Translation Table (DTT) in the AccuRoute Web Client

This is a two-step process:

- Create the Administrator view support in the Web Client Views node
- Specify the View.admin.xml for the group that needs access to the DTT Administrator section for the Web Client

Create the Administrator view support in the Web Client Views node

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration > Groups**.
- 3 Right-click **Groups**. Select **New > Group**.
- 4 In the **Name** text box, enter a name for the group:
`DTT Administrator Group`
- 5 In the **Description** text box, enter a brief description.
- 6 Click the **Members** tab, then click **Add**. The **Add Group** page opens.
- 7 Enter a predefined Active Directory group and click **Check Names**.
- 8 Select the group from the list returned and click **Finish**.
- 9 Click the **Clients** tab.
- 10 Select the **Enable members of this group as users** option.
- 11 In the **Allow group to Route to** section, select the **Printer**, **E-mail**, and **Fax** options.
- 12 Click the **Web Client** tab.
- 13 Select the **Enable members of this group to use the following web view** option.

Specify the View.admin.xml for the group that needs access to the DTT Administrator section for the Web Client

- 14 Select **View.Admin.XML** from the Web View drop-down.
- 15 Click **OK** to save the configuration changes.

Note In order for users to access the correct feature, the order of the groups is important. For example, if a user belongs to the Administrators group and the Domain Users group, the DTT Administrators group should be listed as 1 and the Default group should be 2. (Default is the name of the group that is installed by default and automatically has the domain users added to it.) This ensures that the Administrator user will be able to access the administrator features.

Connectors

The following connectors were updated in AccuRoute v4.0:

[SMTP connector setting for Mail Interceptor](#)[SMTP connector setting for Mail Interceptor](#) (14)

[Fax Service connector to route documents to Fax Service Providers](#) (15)

[Meditech connector to support the Meditech Validator](#) (17)

[Universal Input connector](#) (18)

[Universal Output connector](#) (19)

[DMS connectors](#) (23)

SMTP connector setting for Mail Interceptor

The SMTP connector allows the AccuRoute server to capture SMTP mail messages created by any SMTP mail client, and then process those messages through the AccuRoute server before delivering to the intended SMTP e-mail recipient.

In most cases, the source SMTP mail client is a multifunction peripherals (MFP) or other network scan device performing a scan to e-mail function. The MFP would be configured to use the AccuRoute server as its SMTP mail relay. The IIS/SMTP services running on the AccuRoute server would capture the mail message and submit a job on the message server queue.

FROM, TO, CC, BCC, Subject, and Body Text of the original SMTP mail message are unchanged when the AccuRoute server processes the message. Only the file attachment will be processed and converted, as specified by the system administrator. The system administrator can specify the delivery file format, selecting one format to convert. This format is selected from the list of output file formats supported by the server.

The transaction details about these intercepted e-mails will be tracked and archived as they would be for any other job routed through the message server, submitted in any way.

To configure the SMTP Mail Interceptor:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Connectors**.
- 3 Double-click **SMTP on the Server**. The **Properties for SMTP on the Server** page opens.
- 4 Click **Advanced**.
- 5 Select the **E-mail Interceptor** option at the bottom of the page to enable the Interceptor to capture all e-mail messages relayed through the server.
- 6 Click **OK** twice to complete the configuration.

Fax Service connector to route documents to Fax Service Providers

The Fax Service connector allows the AccuRoute server to be configured to route documents to the following Fax Service Providers (FSPs):

- OpenText EasyLink
- OpenText RightFax

Note A license is required for the Fax Service connector.

Adding an AccuRoute connector for OpenText EasyLink

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and right-click on **Connectors**.
- 3 Select **New AccuRoute Server connector for > Fax Service Connector**. The **Server Address** page opens. The **Run on the Omtool Message Server** option is selected by default.
- 4 Click **Next**.
- 5 The system verifies that the product is installed on the system and opens the **Display Name** page.
- 6 In the **Name** text box, enter a descriptive name (for example EasyLink) for the connector.
- 7 Click **Next**. The **Choose the Fax Service Connector type** page opens.
- 8 Select **Premier Global** from the drop-down (this is also the default selection) and click the **Configure** option. The **Premier Global Configuration** page opens.
- 9 Enter all information needed.
 - a In the **Primary URL** text box, specify the URL that was provided by PGI. For example:
<http://xoa.pt.premierglobal.com/soap/>
 - b In the **User ID** and **Password** text boxes, enter the ID and password of an Administrator account that was provided by OpenText.
 - c In the **Confirm** text box, enter the password again to confirm it.
 - d Optionally, for the **Backup URL**, specify a URL that was provided by OpenText to be used if the primary URL is unreachable.
 - e Click **Test** to authenticate the account credentials with the primary URL.
 - f Click **OK** when you get a successful connection to EasyLink.
- 10 Click **Next**, then **Finish** to complete the connector setup.

Adding an AccuRoute connector for OpenText RightFax

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and right-click **Connectors**.
- 3 Select **New AccuRoute Server connector for > Fax Service Connector**.

The **Server Address** page opens. The **Run on the Omtool Message Server** option is selected by default.

- 4 Click **Next**. The system verifies that the product is installed on the system and opens the **Display Name** page.
- 5 In the **Name** text box, enter a descriptive name (for example, RightFax) for the connector.
- 6 Click **Next**. The **Choose the Fax Service Connector type** page opens.
- 7 Select **Right Fax** from the drop-down and click **Configure**.
- 8 Click **New** and enter all information needed.
 - a In the **Server name** text box, specify the name of RightFax server.
 - b In the **Protocol** text box, specify the protocol (for example, you may be using Named Pipes).
 - c Specify the RightFax User ID for the RightFax Omtool Administrator account.
 - d Specify whether integrated Windows NT security is to be used.
 - e In the **Password** text box, enter the password of an Administrator account. In the **Confirm** text box, enter the password again to confirm it.
 - f Click **TestUID** to authenticate the account credentials with the RightFax server.
 - g Click **OK** when you get a successful connection to RightFax.
 - h Click **OK** to close the page.
- 9 Select **Failover Server**, which is the RightFax server to use as a backup when services are unavailable.

Note If using a failover server, you will have to configure it with the steps above.

- 10 Click **OK**, **Next**, and **Finish** to complete the connector setup.
- 11 Continue with the procedure for [Installing the OpenText RightFax Client \(FaxUtil\)](#), below.

Installing the OpenText RightFax Client (FaxUtil)

The OpenText RightFax solution requires that a OpenText RightFax client is installed on the AccuRoute server where the AccuRoute connector for OpenText RightFax is installed.

Use the following procedure to install the OpenText RightFax client (FaxUtil) and supporting client DLLs that the AccuRoute connector will use to communicate with RightFax servers.

- 1 Load RightFax CD or ISO to RightFax Installation.
- 2 Select **Autorun.exe**. Then select the **Install RightFax Product Suite** option.
- 3 Use the GUI to:
 - ▶ Deselect **RightFax Server**.
 - ▶ Select **RightFax Clients**.
 - ▶ Select only the **FaxUtil** option.
- 4 Complete the installation following the instructions on your screen.

Meditech connector to support the Meditech Validator

The Omtool Healthcare Suite Connector for Meditech gathers patient information from Meditech and routes this information to the ObjectArchive database or other some other database for storage and retrieval on demand.

Patient information is usually gathered during patient registration. Information gathered includes billing, lab modules and other related information.

The Meditech Validator allows the AccuRoute server to validate the existence of a patient record in MEDITECH based on specific property values (Medical Record number and the Account number) provided in the routing information.

When a medical report or a medical bill is scanned and sent to the AccuRoute server for processing, the MEDITECH Validator matches the Medical Record number and the Account number and validates that the information provided are for the same patient in Meditech. By validating the existence of the patient, it makes sure that the documents are being routed and stored for the correct patient.

Not only does this validation protect data integrity, but it also eliminates irregularities and inconsistent billing issues.

Requirements

- Property Dictionary Items (PDI) must be created for all fields that need to be queried for data collection. For information on how to create Property Dictionary Items, see the topic for Configuring a Message Property in the Omtool Server Administrator Help (accessed through the [AccuRoute v4.0 documentation](#) page).
- A preconfigured AccuRoute Connector for MEDITECH, defined for the following properties: AccountNo and MedRecNo.

Note Any other option properties can be defined if necessary.

Adding the Omtool Healthcare Suite connector for Meditech

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and right-click **Connectors**.
- 3 Select **New AccuRoute Server connector for > Meditech**. The Create New connector wizard opens.
- 4 Click **Next**. The **Display Name** page opens.
To install the connector on a remote system, click the **Remote server** option and enter the name or IP address of the remote system in the text box beside the **Remote server** option.
- 5 In the **Name** field, enter a descriptive name for the connector, the default is **MEDITECH on the Server**.
- 6 Click **Next** and **Finish** to close the wizard.

The Omtool Healthcare Suite Connector for MEDITECH is created and listed in the Connector details pane.

Refer also to [Configuring a Meditech Validator](#) (9).

Universal Input connector

The former XML Scan connector has been renamed as the Universal Input connector.

About the Universal Input connector

The Universal Input connector picks up and processes XML documents and submits them to the AccuRoute server for delivery to the intended recipients.

The AccuRoute v4.0 server installation includes the Universal Input connector. This connector specifically handles jobs from the Embedded AccuRoute for HP OXPd client application. (It has a Translation.xsl tool it uses to process files scanned and delivered from HP devices.)

If appropriate for your environment, you can add additional Universal Input connectors.

To access the Universal Input connector:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the **AccuRoute Server**.
- 3 Select **Connectors**.
- 4 The details pane lists the connectors that are licensed with your server.
- 5 Double-click the **Universal Input connector** to view its **Properties**.

Guidelines for folders for the Universal Input connector

The Universal Input connector requires shared folders with correct permissions for the connector to monitor. Use the following guidelines when creating folders for the Universal Input connector to scan:

- Locate the folders on the AccuRoute server or any other computer in the local area network.
- All folders must be shared, with the AccuRoute server user account having full control. User accounts for individual users and devices must have write permissions.
- Create one folder if you want invalid XML files to remain in the folder until someone deletes them. Create two folders if you want the Universal Input connector to move invalid XML files to a different folder.

Adding a Universal Input connector

To create a Universal Input connector:

- 1 Click **Start > All Programs > AccuRoute Server Administrator**.
- 2 In the console tree, click **Connectors > New AccuRoute Server connector for > Universal Input**. The **Server Address** page opens.
- 3 Click **Next**. Alternately, if you want the connector to run on a remote server, click **Remote Server**, enter the **Server Name** and click **Next**. The **Display Name** page opens.
- 4 Enter a descriptive name and click **Next**. You are prompted to specify the folder to scan.
- 5 Click **Browse** and select the folder to scan.
- 6 Click **Next**. The connector is configured and added.
- 7 When the **Congratulations** page opens, click **Finish**.

The new Universal Input connector appears in the details pane.

Adding additional folders for the Universal Input connector

After you create the Universal Input connector, you can specify additional folders for the connector:

- 1 Click **Start > All Programs > AccuRoute Server Administrator**.
- 2 In the console tree, expand the **AccuRoute Server**.
- 3 Select **Connectors**. All connectors in the environment are listed in the details pane.
- 4 Double-click the **Universal Input** connector to open the **Properties** page.
- 5 Click **Folders > New**. The **New Folder** page opens.
- 6 In the **Folder to Scan** section, click **Browse**. Navigate and select the folder of interest.

Optionally, select the **Enable Xml Translation** check box for this folder and follow the instructions in [Enabling XML translation](#) (19) below.

If you do not enable xml translation, the files you drop in the folder for processing must have a format recognized by the AccuRoute server.

- 7 Click **OK** to save your changes and close the **New Folder** page.

Enabling XML translation

When you enable xml translation, you must create and keep the `translation.xslt` file in each of the folders you specify for xml translation. Without this translation file, any xml file without the xml format recognized by the server is labelled as invalid and not processed by the server.

To enable XML translation:

- 1 **Programs > AccuRoute Server Administrator**.
- 2 In the console tree, expand the **AccuRoute Server**.
- 3 Select **Connectors**. All connectors in the environment are listed in the details pane.
- 4 Double-click the **Universal Input** connector to open the **Properties** page.
- 5 Click **Folders**. Select the folder listed and click **Properties**. The **New Folder** page opens.
- 6 Select the **Enable Xml Translation** option and click **Add**. The **Enter Extension** page opens.
- 7 Enter `*.xml` and click **OK** to close the page.
- 8 Click **OK** to save your changes and close the **New Folder** page.
- 9 Click **OK** to close **Properties for Universal Input** on the server page.

Universal Output connector

The former XMLStore connector has been renamed as the Universal Output connector.

About the Universal Output connector

The Universal Output connector enables AccuRoute to support integration with external software systems. AccuRoute integrates with these systems so that documents captured through AccuRoute can be transferred to the third party system for processing.

AccuRoute and third party system integration use AccuRoute's Universal Output connector to output scanned documents and meta-data to a target network folder. This folder is monitored by the third party system as a source for incoming documents to process. The Universal Output connector stores a scanned document as well as an XML file which may include meta-data regarding the scanned document. The Universal Output is configured to use an XSLT, which formats the output meta-data from the AccuRoute server in a documented format that can be parsed and imported to the third party system.

The XMLStore connector delivers the following items into a specified output folder:

- A document.
- An XML file containing meta-data describing the document and its processing through the system.

The XML file content is configurable based on a script in an XSLT style sheet. In this way, any downstream application can pick up, parse and process captured, converted documents and meta-data by monitoring the output folder.

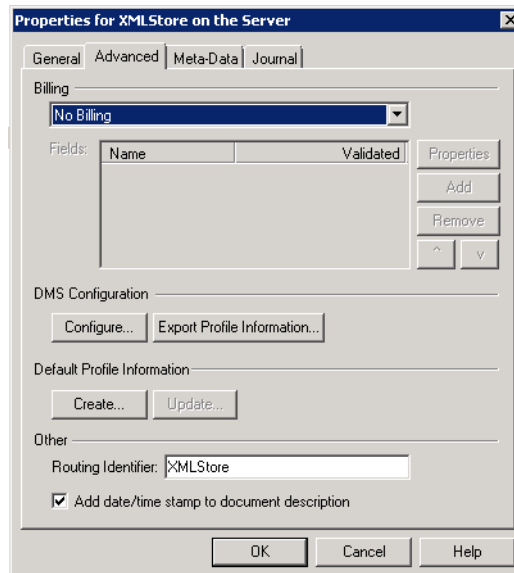
For the Universal Output connector to work properly, you need to make sure you:

- Set up the Default Profile for the connector. You do not necessarily need to edit or override anything, but you must create the Default Profile based on your configuration.
- Ensure that the job sent to the Universal Output specifies the `prDMSUseDefaultProfile` property is 1 (true). This can be done via the OnRamp (such as Filescan) or in the rule that is routing to the Universal Output connector via Advanced/Core Properties.

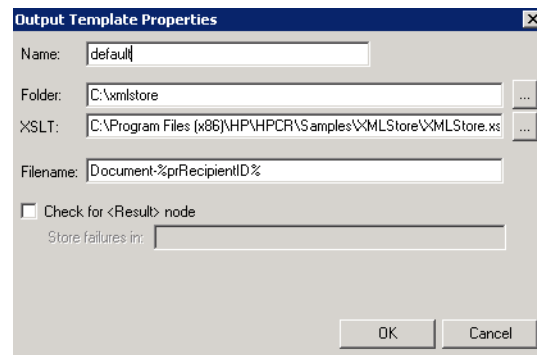
Accessing the XMLStore connector

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the **AccuRoute server**.
- 3 Select **Connectors**. The details pane lists the connectors that are licensed with your server.
- 4 Double-click the **Universal Output connector** to view its **Properties**.

- 5 Select the **Advanced** tab.



- 6 Select the **Configure** button in the **DMS Configuration** section.



- 7 Configure the **Folder** field to an output folder for the images and XML files.
- 8 Configure the **XSLT** field to point to the XSL translation file that will format the XML file.
- 9 Optionally, change the **Filename** field to produce the appropriate name.

Creating an AccuRoute connector for Universal Output

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 Right-click **Connectors** and select **AccuRoute Server Connector for > Universal Output**.
- 3 In the **Server Address** window, select **Run on the Message Server** and click **Next**. The **Display Name** page opens.
- 4 Enter a name in the **Display Name** text box.
- 5 Click **Next** and then **Finish**. The **Universal Output Configuration** page opens.

- 6 To select the output templates, click **New**. The **Output Template Properties** page opens. Enter a name.
- 7 In the **Folder** text box, browse and select the shared folder you created. For example:
`\\MAGNOLIA\XMLSTORE` where *Magnolia* is the name of the AccuRoute server.
- 8 In the **XSLT** text box, browse and select the xsl file included as a sample with AccuRoute server installation in: `C:\PROGRAM FILES (x86)\Omtool\Omtool Server\Samples\XMLStore`.
- 9 Click **OK** and then **Finish**.

The AccuRoute Connector for the Universal Output Connector is now created and listed on the **Connector** page.

Creating a default profile for the AccuRoute connector for Universal Output

- 1 Click **Start > All Programs > AccuRoute Server Administrator**.
- 2 Right-click **Connector** and select **Universal Output**.
- 3 Go to the **Default Profile Information** section on the **Advanced** tab and click **Create**. The **Universal Output Profile template** window opens.
- 4 Select the profile name from the **Template** list and click **OK**. The **DMS Rule Properties** page opens.
- 5 Click **OK**. Click **OK** again to exit the connector configuration.

Sending a document to the AccuRoute connector for Universal Output

The AccuRoute Connector for Universal Output helps you manage and route XML documents to specific XML repositories.

Note Note: Ensure that the job sent to the Universal Output Connector specifies the `prDMSUseDefaultProfile` property as `1` (true). This can be done via the OnRamp (such as Filescan) or in the rule that is routing to the Universal Output connector via Advanced/Core Properties. If you add a secondary Core Property of `prXMLStoreSeparatePages` `1`, multiple pages are delivered as a single page in the output folder.

Sending from Filescan

The control file must have the following property:

```
#prDMSUseDefaultProfile 1
```

An additional property can be used to specify single or multiple pages as the final document(s). For a single document that has multiple pages as the final form, use:

```
#prXMLStoreSeparatePages 0
```

For multiple documents of a single page each, as the final form use:

```
#prXMLStoreSeparatePages 1 (default)
```

Here is an example of a control file that sends a single file to the specified Universal Output directory:


```
#SENDER_EMAIL test@test.com
#prDMSUseDefaultProfile 1
#prXMLStoreSeparatePages 0
#DESTINATION +12223334444
```

Sending from a routing rule

Create or modify the outbound routing rule to be used for sending documents to the Universal Output Connector. As an example of creating a rule:

```
if fax is 123, route to xmlstore - Advanced button, core properties -
prDMSUseDefaultProfile 1
```

DMS connectors

The following DMS connectors are enhanced in AccuRoute v4.0:

- ProLaw
- HP Autonomy iManage WorkSite
- WORLDOX GX2
- NetDocuments

Each connector is described below.

ProLaw

The ProLaw DMS connector is required when using ProLaw with the AccuRoute Desktop or the optional AccuRoute Extensions for ProLaw (contact your Omtool Sales representative). Refer to the *AccuRoute Connector for ProLaw Installation and Integration Guide* accessed through the [AccuRoute v4.0 documentation](#) page.

HP Autonomy iManage WorkSite

HP Autonomy iManage WorkSite DMS connector enables users to import hardcopy documents into WorkSite libraries. Refer to the *Omtool DMS Libraries Installation and Integration Guide for WorkSite* accessed through the [AccuRoute v4.0 documentation](#) page.

WORLDOX GX2

World Software WORLDOX GX2 is qualified for use with AccuRoute. The AccuRoute DMS connector routes documents from the AccuRoute server to the WORLDOX GX2 document repository. Requirements are:

- The WORLDOX client software when installed and configured on the AccuRoute server must not integrate with Microsoft Word

Important When using a Remote AccuRoute connector for DMS, the DMS client application must be installed and configured on the remote system.

- AccuRoute Connector for DMS license - for purchase information, contact [Omtool Sales](#).

To add the WORLDOX GX2 DMS connector:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.

- 2 In the console tree, expand the AccuRoute Server Administrator and right-click **Connectors**.
- 3 Select **New Accuroute Server connector for > WORLDOX**.
- 4 Click **Next**. The **Server Address** page opens.
- 5 Click **Next**. Alternately, if you want the connector to run on a remote server, click **Remote Server** and enter the server name. Click **Next**.

The **Display Name** page opens.

- 6 In the **Name** text box, enter an appropriate name.
- 7 Click **Next**. The **Congratulations** page opens.
- 8 Click **Finish**. The **WORLDOX configuration** dialog opens.
 - a Select **Client Files** from the drop-down list for **Profile Groups**.
 - b Click **Next**. Enter the **User Code**.
 - c Click **Next**. The **WORLDOX Network Resources Configuration** page opens.
 - d If the WORLDOX document servers are located on a non-Microsoft network, enter the network shares, user name, and password.
 - e Click **Finish**.

AccuRoute Connector for DMS WORLDOX GX2 is listed in the details pane.

To configure DCOM permissions on the World Software WORLDOX Client system:

- 1 In the client system, click **Start > Run** and enter `dcomcnfg` to open the Component Services console.
- 2 Navigate to **Component Services > Computers > My Computer > DCOM Config**.
- 3 Right-click on **omdProviderProxy** and select the radio button option corresponding to **Interactive User** under the **Identity** tab of **Properties** dialog. Click **OK**.
- 4 Right-click on **OmConDMS** and select radio button option corresponding to **Interactive User** under the **Identity** tab of the **Properties** dialog and click on **OK**.
- 5 Reboot the system.

NetDocuments

There are expanded capabilities to the AccuRoute server for routing documents to the NetDocuments Cabinet using either the AccuRoute Connector for NetDocuments or the NetDocuments Volume List.

To configure the NetDocuments DMS connector:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and right-click **Connectors**.
- 3 Select **New AccuRoute Server connector for > NetDocuments**.
The **Server Address** page opens. The **Run on the Omtool Message Server** option is selected by default.
- 4 Click **Next**.
- 5 The system verifies that the product is installed on the system and opens the **Display Name** page.

- 6 In the **Name** text box, enter a descriptive name for the connector.
- 7 Click **Next**. A summary page is displayed.
- 8 Click **Finish**. The **NetDocuments Login Configuration** page opens.
- 9 Enter all information needed.
 - a Specify the **Cabinet name**.
 - b Enter the **User name**.
 - c In the **Password** text box, enter the password of an Administrator account. In the **Confirm** text box, enter the password again to confirm it.
- 10 Click **Finish** to close the page and complete the connector setup.

Components

Data validation enhancements

The data validation capabilities of the AccuRoute server have been enhanced to support the addition of returning all data specified in a query to the associated properties of the job being processed. In addition to the server, the AccuRoute Desktop Client, the Image-In Queue, the AccuRoute Web Client, and the Data Extractor have all been enhanced to support this feature for a more streamlined user experience.

Note Property Dictionary Items (PDI) must be created for all fields that need to be queried for data collection. For information on how to create Property Dictionary Items, see the [Configuring Message Property](#) topic in the [Omtool Server Administrator Help](#) (accessed through the [AccuRoute v4.0 documentation](#) page).

In previous AccuRoute versions, the retrieved data was used only as a display property which the user could use to verify the value entered. For example, when the user adds a customer number the server will validate the data and retrieve the name of the validated customer and ask the user to confirm. But the retrieved data was not retained for future use.

The enhanced validation capabilities in this release provide the ability to both retrieve multiple data elements during validation and to add the retrieved data to the metadata of the job being processed. The modified metadata can be used in the same manner as data submitted to the AccuRoute server with a job, or when entered by a user.

With the expanded capability, the AccuRoute Administrator can configure the data validation capability of the AccuRoute server to retrieve data from an SQL data source that is related to the data being validated, and to use that data throughout the system.

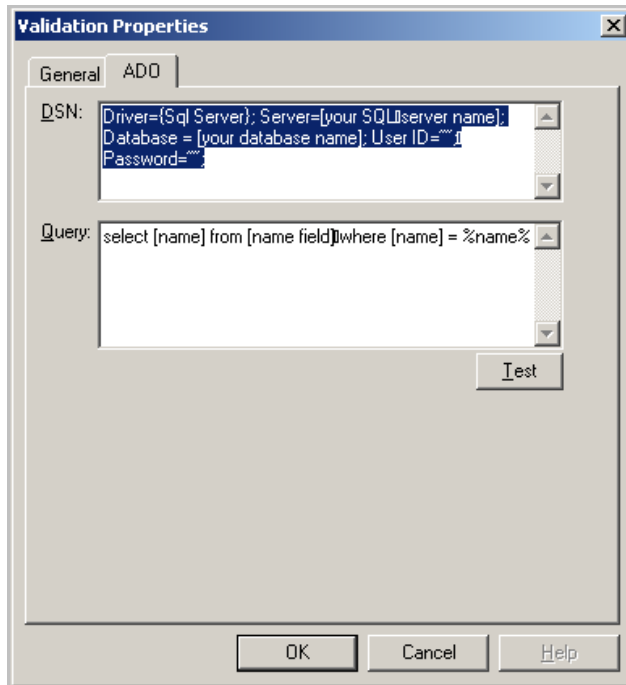
Configuring data validation

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration > Properties**.
- 3 Double-click on an existing property that is to be configured. The **Property Dictionary Item** page is displayed.

- 4 Click the **Validation** tab.
- 5 Select **Validate** and choose a validation option:
 - ▶ **Use Items list** - to validate against values within the **Items** tab of the Property Dictionary Item.
 - ▶ **Use length restriction** - to restrict the property values to be within the limits selected.
 - ▶ **Use Server Validation** - to validate the property values against a configured database. If you select this option:
 - a Click the **Configure Server Validation** button.
 - b Select **ADO Validator** from the **Type** drop-down list.
 - c Click **OK**. The **Validation Properties** page opens.
 - d On the **General** tab, select the options for this validation:
 - ▲ **Mandatory** - user must specify a valid value
 - ▲ **Optional** - user may continue if not valid

You also can select the **User must confirm successful validations** option for either of the above choices.
 - e Click the **ADO** tab.
 - f In the **DSN** text box, enter the data source name of the database required for data validation. The DSN string should be in the following syntax:


```
Driver={Sql Server}; Server=[your SQL server name]; Database = [name of the database being used for data validation]; User ID=""; Password="";
```
 - g In the **Query** text box, enter your query for data validation.



The table below shows the breakdown of a query for data validation based on the two property fields returning data: Matter and VoucherID.

Table 1: Table showing data validation query breakdown

Query syntax breakdown	Description
SELECT	The 'select' items are what is returned based on the given property value.
Matter as [{Matter}],	The first item is the column in the sql table and then PDI name for the data being returned. Note: PDI = Property Dictionary Item. For instructions on how to create Property Dictionary Items, see the Configuring Message Property topic in the Omtool Server Administrator Help (accessed through the AccuRoute v4.0 documentation page).
VoucherID as [{VoucherID}]	The first item is the column in the sql table and then PDI name for the data being returned. Note: PDI = Property Dictionary Item.
FROM InvoiceTable	This is the SQL table that the search will be in.
WHERE Client = '%Client%'	This is the field that is used for validating against a given property value.

Using the guidelines above, your query for Matter and Voucher ID by providing the Client value will look like this.

```
SELECT Matter as [{Matter}],VoucherID as [{VoucherID}] FROM
InvoiceTable WHERE Client='%Client%'
```

Important This will require a Database with a table configured with columns of Matter and VoucherID.

- h** Click **Test** to test the validator.
- i** Click **OK** to create the validator.

New AccuRoute component: Collection locator

A Document Collection is a collection of documents with the same property and index metadata. You can route documents to a Document Collection by specifying the Document Collection Key property for the associated job. The Document Collection Key property acts as a locator key and helps the Data Extractor Component to identify and route documents to the correct Document Collection. The exact location of the Document Collection can be an active queue or it may be a specific queue destination (for example, an Archived Volume List).

Note Since a Document Collection can be uniquely identified by more than one AccuRoute property, the Administrator can configure one or more Document Collection Keys (for example BOL or FileNumber) if needed.

New documents added to a Document Collection will automatically have the metadata associated with existing documents applied to them.

Defining the Collection Keys property

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Queues**.
- 3 Double-click on the queue to configure. The **Properties** page opens.
- 4 Click the **Collections** tab.
- 5 Click **Add** to define the new collection.
- 6 In the **Name** text box, add the name of the collection.
- 7 In the **Filter** section, click **Insert** and add the filter criteria, for example:

```
{DocumentState} = "".
```
- 8 In the **Groupings** tab, click **Add** to open the **Select Property Dictionary Item** dialog and select the required properties.
- 9 Similarly, in the **Listing** tab, click **Add** to open the **Select Property Dictionary Item** dialog and select the required properties.
- 10 Click **OK** to create the Collection.

Configuring the Collection Locator Component

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Components**.
- 3 Double-click on **Collection Locator** to open the **Properties** page.
- 4 Click the **Advanced** tab and click **Add**. The **Select Property Dictionary Field** opens.
- 5 Select the property you want to add and click **OK** to add the property to the **Collection Keys** section.
- 6 In the **Search Volume List** section, select **Active** and any other Volume List that should be searched.
- 7 Click **OK** to save your changes.

Compose engine updates

AccuRoute updates all vendor libraries (Ghostscript, Datalogics, etc.), as necessary. The following Compose engines have been updated:

- [ABBYY FineReader® Engine 10.0.10.76 for OCR support](#) (29)
- [RTF Composer updates](#) (29)
- [Additional third-party Compose engine updates](#) (30)

Information about Compose feature updates is provided in [Compose feature updates](#) (30)

ABBYY FineReader® Engine 10.0.10.76 for OCR support

For the past twenty years, Omtool has prided itself on delivering innovative and continuously enhanced software to our customers. In support of this commitment to innovation, and based on recent corporate and market dynamics, Omtool is now offering ABBYY® OCR technology in all of our product offerings.

ABBYY FineReader converts PDF documents to these supported OCR output formats.

- DOC (OCR Text)
- DOCX (OCR Text)
- PDF (OCR Image+Text)
- PDF (OCR Text)
- PDF/A (OCR Image+Text)
- PDF/A (OCR Text)
- RTF (OCR Text)
- TXT (OCR Text)
- XLS (OCR Text)
- XLSX (OCR Text)

ABBYY FineReader converts these documents to PDF output formats.

Note The ABBYY FineReader Engine 10.0.10.76 does not support OCR.WPD final format.

Note The ABBYY FineReader engine supports only barcode searching. Routing Sheets with text Distribution Rules are no longer supported.

RTF Composer updates

RTF Automation converts PDF documents to these supported formats.

- RTF
- OMTPL
- TXT

Additional third-party Compose engine updates

The AccuRoute installation includes updates to the following:

- Ghostscript version 9.04
- Adobe PDF Library version 9.1.0.54
- Inlite Research ClearImage SDK version 7.0.3189
- Aspose is a conversion engine that enables the AccuRoute server to convert Microsoft Office files even when the Microsoft Office suite is not installed. The Aspose engine can convert these file types to PDF:

Aspose	Version	File Types
Aspose.Word	10.8.0.0	DOC / DOCX (OCR text) / RTF
Aspose.Slides	5.8.0.0	PPT / PPTX
Aspose.Diagram	1.7.0.0	VSD / VSDX
Aspose.Cells	7.0.3.0	XLS / XLSX

Compose feature updates

Additional and updated Compose features include:

- [OCR language support](#) (30)
- [PDF/A selectable for document conversion](#) (41)
- [Compose bypass for any file that normally would result in a failed message](#) (41)

OCR language support

The user can select, from a prompt on the MFP, the language engine to use when scanning documents for OCR output. This ensures that the output is as accurate as possible for text search actions. The system administrator first defines any of the languages on the server and then makes the languages selectable by the user. Specifically, the system administrator can select from these languages:

Armenian (Eastern)	Czech	Hungarian	Portuguese (European)
Armenian (Grabar)	Danish	Indonesian	Romanian
Armenian (Western)	Dutch	Italian	Russian
Bashkir	Dutch (Belgian)	Japanese	Slovak
Bulgarian	English	Japanese + English	Slovenian
Catalan	Estonian	Lithuanian	Spanish
Chinese (Simplified)	Finnish	Norwegian	Swedish
Chinese (Traditional)	French	Norwegian (Bokmal)	Tatar
Chinese (Simplified) + English	German	Norwegian (Nynorsk)	Turkish
Chinese (Traditional) + English	German (New Spelling)	Polish	Ukrainian
Croatian	Greek	Portuguese (Brazilian)	

Enabling and disabling languages supported by the OCR process

By default, the English language is enabled for OCR processes at the server level. You can enable any other language that is supported by AccuRoute, if required.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Components**. The details pane lists the components in your environment.
- 3 Double-click the **Compose** component. The **Properties for Compose** page opens.
- 4 Click the **OCR** tab to open the **OCR** page.
- 5 Click **Advanced**. The **OCR Properties** page opens.
- 6 Click the **Languages** tab.
- 7 To enable a language, select (check) it.
To disable (stop supporting) a language, be sure it is not selected (not checked).
- 8 Click **OK** to save your changes.

Configuring user selectable languages for OCR final format at the device

This section provides a procedure to complete the setup of a user selectable language for OCR final format. This procedure includes:

- Server configuration to create a property for the prompt
- Web Client configuration
- Device verification

Repeat the entire procedure for each supported language.

Server configuration to create a property for the prompt

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration**.
- 3 Right-click on **Properties** and select **New > Property Dictionary**. The **Property Dictionary Item** page is displayed.
- 4 On the **General** tab, enter the following (the text input is provided here as an example):
Name: `OCRLanguage`
Label: `Select Language` (this label will appear on the device)
Instructions: `Select the language to increase OCR accuracy of your scanned document.`

Type: Generic List

Property Dictionary Item

General | Items | Validation | Formatting

Name: OCRLanguage

Label: Select Language

Instructions: Select the language to increase OCR accuracy of your scanned document.

Type: Generic List

Mappings:

Properties...
New...
Remove
To Clipboard

Automatic Assignment (Barcode Detection Component)

Regular Expression:

OK Cancel

- 5 In the **Mappings** section, click **New**. Then, select **OPath** and enter the following path (exactly as shown):

`\\prComposeOcr\prLanguages(prOCRLanguageName=*)\prOCRLanguageName`

Property Definition

Specify the property by:

Property name:

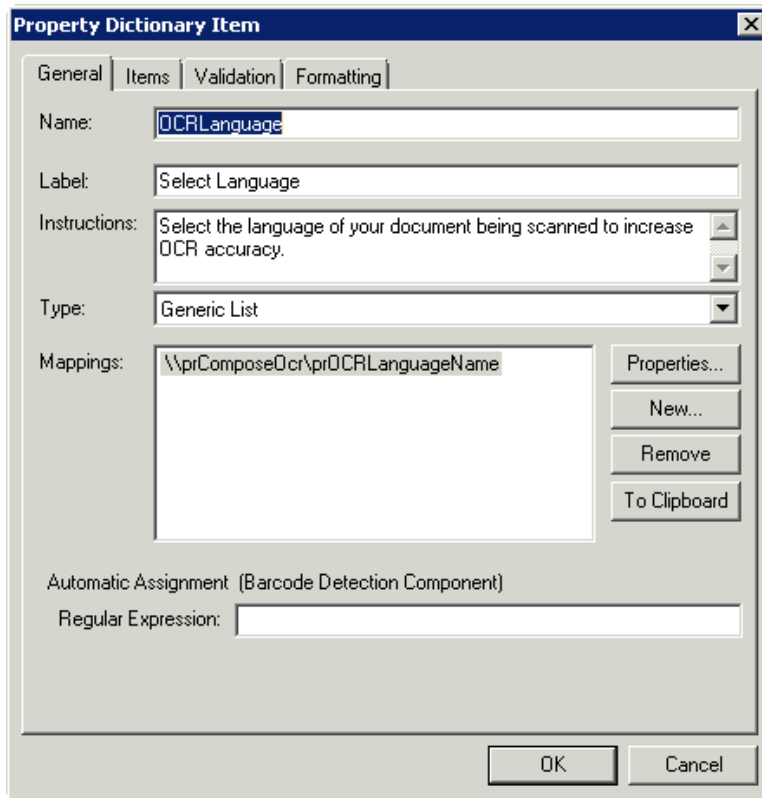
Template Var:

DMS Custom Field:

OPath: \\prComposeOcr\prLanguages(prOCRLanguageName=*)\prOCRLanguageName

OK Cancel

- 6 Click **OK** to return to the **Property Dictionary Item** page.



The screenshot shows a dialog box titled "Property Dictionary Item" with a close button (X) in the top right corner. The dialog has four tabs: "General", "Items", "Validation", and "Formatting". The "General" tab is selected. The fields are as follows:

- Name: OCRLanguage
- Label: Select Language
- Instructions: Select the language of your document being scanned to increase OCR accuracy.
- Type: Generic List
- Mappings: A text area containing the text: \\prComposeOcr\prOCRLanguageName
- Buttons: Properties..., New..., Remove, To Clipboard
- Automatic Assignment (Barcode Detection Component):
 - Regular Expression: (empty text box)
- Bottom buttons: OK, Cancel

- 7 Click the **Items** tab.
- 8 Specify the language items. To do so:
 - a Click **New**.

b Enter **Value** and **Internal (optional)** information for each language.

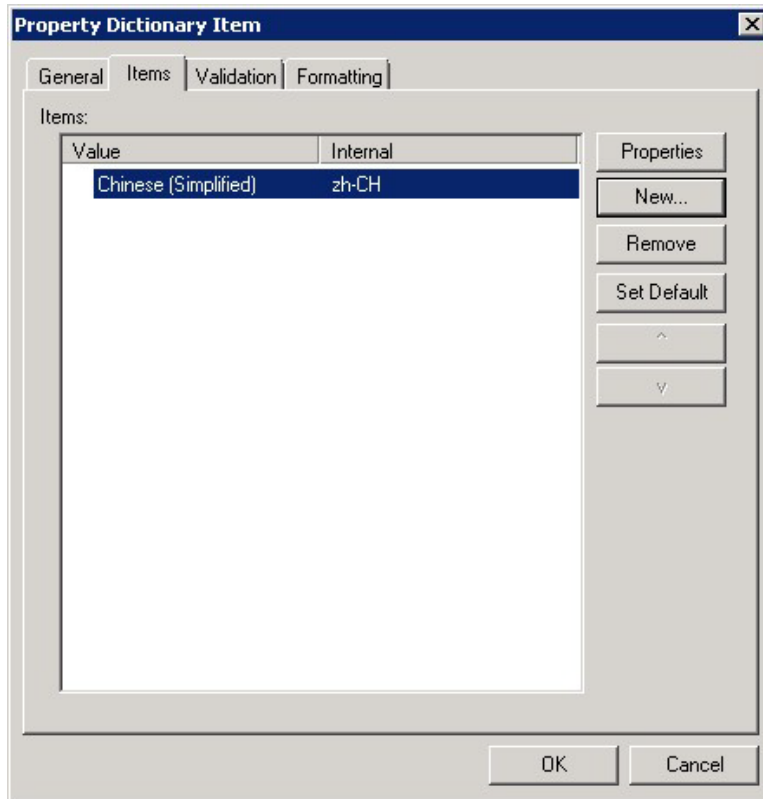
Value	Internal (optional)
Armenian (Eastern)	hy-AM
Armenian (Eastern)	ArmenianEastern
Armenian (Grabar)	ArmenianGrabar
Armenian (Western)	ArmenianWestern
Bashkir	ba-RU
Bulgarian	bg-BG
Catalan	ca-ES
Chinese (Simplified)	zh-CH
Chinese (Traditional)	zh-TW
Chinese (Simplified) + English	ChineseSimplified+English
Chinese (Traditional) + English	ChineseTraditional+English
Croatian	hr-HR
Czech	cs-CZ
Danish	da-DK
Dutch	nl-NL
Dutch (Belgian)	nl-BE
English	en-US
Estonian	et-EE
Finnish	fi-FI
French	fr-FR
German	de-DE
German (New Spelling)	GermanNewSpelling

Value	Internal (optional)
Greek	el-GR
Hungarian	hu-HU
Indonesian	id-ID
Italian	it-IT
Japanese	ja-JP
Japanese + English	Japanese+English
Lithuanian	lt-LT
Norwegian	nb-NO
Norwegian (Bokmal)	nb
Norwegian (Nynorsk)	nn
Polish	pl-PL
Portuguese (Brazilian)	pt-BR
Portuguese (European)	pt-PT
Romanian	ro-RO
Russian	ru-RU
Slovak	sk-SK
Slovenian	sl-SL
Spanish	es-ES
Swedish	sv-SE
Tatar	tt-RU
Turkish	tr-TR
Ukrainian	uk-UA

The following example shows information for Simplified Chinese:

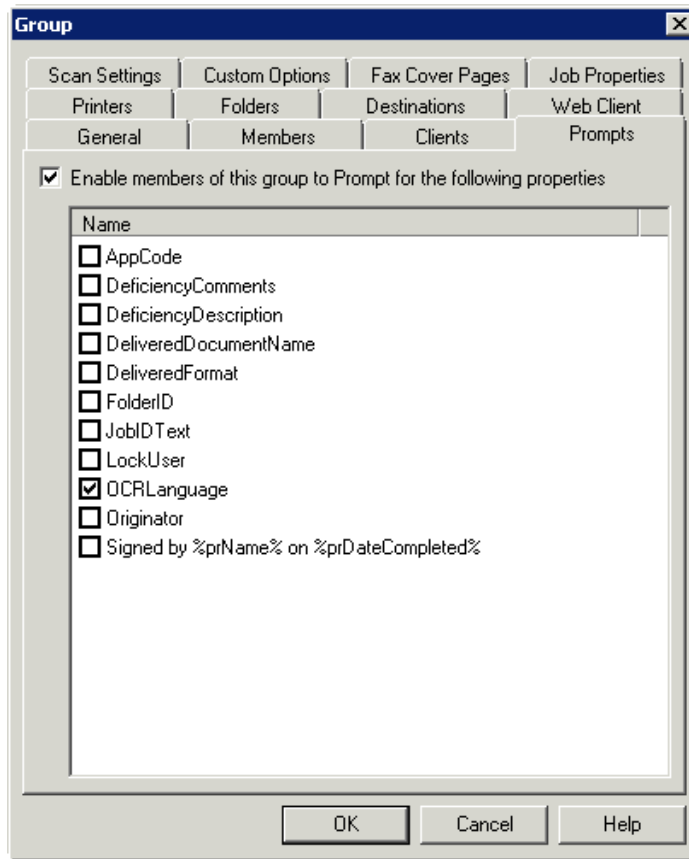
The screenshot shows a dialog box titled "List Item Properties" with a close button (X) in the top right corner. It contains two text input fields: "Value:" with the text "Chinese (Simplified)" and "Internal (optional):" with the text "zh-CH". At the bottom of the dialog are two buttons: "OK" and "Cancel".

- c After you enter the **Value** and **Internal (optional)** information, click **OK** to return to the **Items** page.



- 9 Click **OK** to save changes to the property.
- 10 Go to **Configuration > Groups**.
- 11 In the right pane, double-click on the **Default** group. The **Group** page is displayed.
- 12 Click on the **Prompts** tab.
- 13 Select **Enable members of this group to Prompt for the following properties**.

14 Select the **OCRLanguage** prompt.



15 Click on the **Folders** tab.

16 Select a folder to which to route for testing purposes. (The file can go anywhere for actual use.)

17 Click **OK** to close the **Group** page.

Web Client configuration

18 Log on to the Web Client from the public user account.

19 Create a directive from the Web Client that routes to a network folder.

20 Verify that the final format is a OCR.RTF. This will enable you to see that the output is actually what it is supposed to be and not just an image of the scan.

Device verification

21 Walk up to the device.

22 Select **Public Distributions**.

23 Select the language-prompted directive. For example, select **Chinese (Simplified)**.

24 Scan the document (such as a Simplified Chinese sample document).

25 Verify that the file found in the network folder contains the appropriate text.

26 Repeat this entire procedure (starting with Step 1) for all supported languages.

Testing Compose of an Asian Language to an OCR final format

- 1 Enable one Asian language type (such as Chinese).

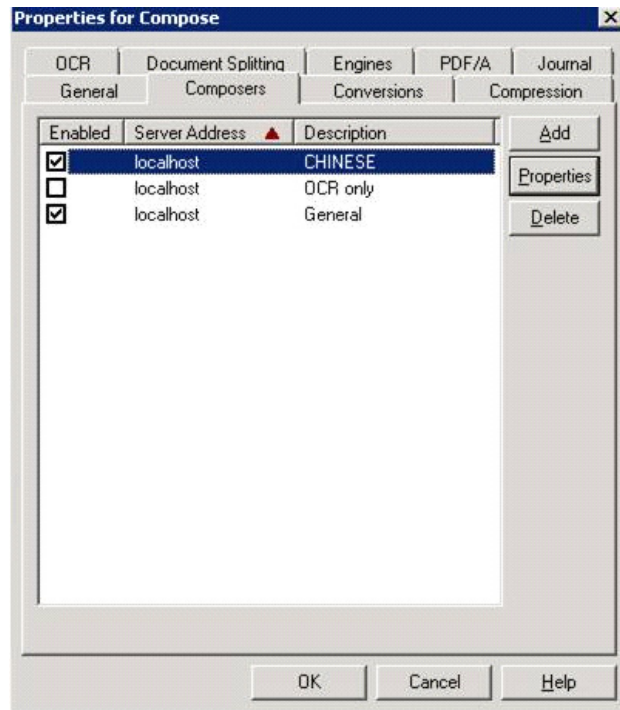
Note You can enable only one Asian language at a time for a composer. If you enable more than one Asian language, all documents will fail to compose.

- 2 Submit your documents via Filescan with a control file property for the OCR conversion type of the language you want to be OCR'd.

Tip Best practice is to have OCR.RTF or OCR.DOC, OCR.DOCX as the final form so that you are viewing the actual characters and not an image of the characters.

- 3 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 4 In the console tree, expand the AccuRoute Server Administrator navigate to **Components**.
- 5 Double-click on **Compose**.
- 6 Click the **OCR** tab and then the **Advanced** button.
- 7 Click the **Languages** tab. Select the Asian language, such as **Chinese (Simplified, PRC)**. Click **OK**.
- 8 Click the **Composers** tab and then the **Add** button.
- 9 Enter `localhost` as the **Server Address**. Then enter an Asian compose license for the **License key**. Click **OK**.
- 10 Highlight the Asian language composer and click the **Properties** button.
- 11 On the **Composer Package Properties** page, you can enter a **Description** (such as **CHINESE**).
- 12 Click the **Convert To** tab. Enable only OCR.xxx file conversion. Click **OK**.

- 13** On the **Properties for Compose** page, disable the **OCR only** composer to ensure that compose jobs are sent to the Asian language composer (such as the Chinese composer).



- 14** Create an outbound rule (**Messages > Outbound**) with criteria to set the destination as a fax number, an action to route to a connector (Filescan on the server), and the document delivery method as DOC (OCR Text).
- 15** Submit a quick fax (**Messages > New > Quick Fax**) to the fax number. Add the language document (such as chinese_sample.doc) as an attachment.
- 16** Verify that the file is composed and that the final form is in the same language as the original.

To test another Asian Language without changing anything on the composers from the above testing:

- 1** Create a control file with the following variables:

```
#SENDER_EMAIL test@test.com
# \\prComposeOcr\prOCRLanguages (prOCRLanguageId=120) \prEnabled 1
#DESTINATION 123
```

The second line indicates the language. In the example above, Simplified Chinese is specified (LanguageID=120).

- 2** Submit a language file to be OCR'd.
- 3** Verify that the output is converted correctly.

You can test each language OCR, one at a time, by submitting the jobs through Filescan using the control file and setting these properties:

Chinese (Simplified): `\\prComposeOcr\prOCRLanguages (prOCRLanguageId=120) \prEnabled 1`

Japanese: `\\prComposeOcr\prOCRLanguages (prOCRLanguageId=119) \prEnabled 1`

PDF Forms Generator

The PDF Forms Generator is a template engine similar to the OMTPL and Microsoft® Word template engines. Any job that has a PDF Form marked as a template is processed by the PDF Forms Generator. The PDF Forms Generator handles template substitution and replaces all the standard template tags or OPath properties with properties from the job. If there is no substitution value then the tag is replaced with an empty string.

If a PDF Form is attached to a job as a regular message attachment it is not processed by the PDF Forms Generator.

Note Only interactive forms created by Acrobat are supported. XFA forms created by Adobe LiveCycle Designer are not supported. If the PDF Form Engine tries to process an XFA PDF, it will fail the job and return an error stating the XFA format is not supported.

The documents processed by the PDF Forms Generator remain editable PDF Forms. These forms are not flattened, so if the file is opened by a PDF Reader the user can edit, copy and paste, and print the form fields.

Important The Form fields cannot be resized to fit the replaced data. If the content that is being replaced is too large for the field the entire value may not be visible.

The following PDF template cover pages: OmtoolCoverpage.pdf and RoutingSheet.pdf are located in the following folder: \\[installdir]\Samples\PDF Forms

Using a PDF form as a cover page

- 1 Create the PDF Form. Alternately, copy the OmtoolCoverpage.pdf located in the following folder:
\\[installdir]\Samples\PDF Forms
- 2 Add the form to the <ServerInstall>\Languages<Language>\Coverpages folder.

Using a PDF form as a Routing Sheet

- 1 Create the PDF Form. Alternately, copy the sample PDF Form and the RoutingSheet.pdf located in the following folder:
\\[installdir]\Samples\PDF Forms
- 2 Add the form to the <ServerInstall>\Languages<Language>\EmbeddedDirectives folder.
- 3 Create a .wtx file and place it in the following folder with the same file name of the routing sheet that it is referring to:

<ServerInstall>\Languages<Language>\EmbeddedDirectives

The only thing that will be contained in the wtx file is the name of the cover page. This is the name that shows up when a cover page is selected in the AccuRoute Desktop Client.

Note For information on wtx files and how to create them, refer to the following topics in the Omtool Server Administrator Help (accessed through the [AccuRoute v4.0 documentation page](#)): [About notification message templates](#) and [Guidelines for creating and modifying a routing sheet templates](#).

- 4 Open the AccuRoute Desktop Client application and select the PDF form.

Any field with `%OMEDID_BARCODE%` will be converted into a barcode field. The barcode is scaled to fit the dimensions of the field. It is recommended that you design the PDF Form in such a way as to ensure that the barcode field is not too small or has odd dimensions that would cause failures when trying to read the barcode.

Using a PDF form with Filescan control files

To create a PDF Form with a Filescan control file, create an AccuRoute Connector for Filescan. Then create a filescan control file with the keyword `#ATTACHFLAGS` which has the value of `SUBSTITUTE`. Using this control file, all attachments with the correct document extensions will be treated like a template (coverpage) where the job properties will be substituted.

To configure a PDF form with a Filescan control file:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Connectors**.
- 3 Right-click and select **New AccuRoute Server connector for > Filescan**. The **License** page opens.
- 4 Enter a valid license and click **Next**. The **Server Address** page.
- 5 Click **Next**. Alternately, if you want the connector to run on a remote server, click **Remote Server** and enter the server name. Click **Next**. The **Display Name** page opens.
- 6 Enter a descriptive name and click **Next**. You are prompted to choose the folder to scan.
- 7 Click **Browse**. Navigate and select the folder. You can select additional folders to scan after you have created and configured this connector.
- 8 Click **Next**. The connector is configured and added. The **Congratulations** page opens.
- 9 Click **Finish**. The new Filescan connector is listed in the details pane.

To create a Filescan control file using the `#ATTACHFLAGS` keyword:

- 1 Create a control file and place it in the filescan folder.
- 2 Use a text editor to create control file.

The following keywords should be included in the control file. Enter a pound sign (#) before each keyword as shown below.

```
#SENDER_EMAIL user1@xyz.com
#SENDER_NAME Jane Doe
#DESTINATION email user2@abc.net
#RECIP_EMAIL user@abc.com
#ATTACHMENT C:\Users\user1\Desktop\eventvwr.pdf
#ATTACHFLAGS SUBSTITUTE
```

Note Attachments marked with `SUBSTITUTE` variable must be a `DOC`, `RTF`, `OMTPL` or `PDF` or you will get a `Compose failure error`.

- 3 Save the control file as a text file with a `.control` extension for ASCII files or a `.controlu` extension for unicode files.

For more information on creating Filescan control files and list of control file keywords, refer to the following topics in the Omtool Server Administrator Help (accessed through the [AccuRoute v4.0 documentation](#) page): [Guidelines for creating control files](#) and [List of control file keywords](#).

PDF/A selectable for document conversion

The Compose Component now supports PDF/A as document final format. PDF/A is the ISO Standard for using the PDF file format in archiving electronic documents.

- PDF/A
- PDF/A (image + OCR text)
- PDF/A (OCR text)

Note The PDF/A1-b final format will be preserved through splits and merges.

When PDF/A files are opened in Adobe Acrobat, they can have a blue bar across the top indicating they are PDF/A compliant. To ascertain the compliance, run the file through a PDF/A verifier such as Preflight, which is found in the full version of Adobe Acrobat. Or, use the free online verifier at:

<http://www.pdf-tools.com/pdf/validate-pdf-a-online.aspx>.

Tip Files that start as electronic documents may fail PDF/A-1b conformance verifications due to the potential issues related to font availability. Omtool recommends using scanned documents for PDF/A conversions.

Note Omtool uses Adobe Acrobat X for PDF/A-1b conformance verification.

Compose bypass for any file that normally would result in a failed message

The Compose Bypass can be used for any file that normally would fail. This composer allows specific rules to be created so that files of that type are submitted to the server along with other attachments that are passed through. For example, a user could send a PDF file and a ZIP file to the server so that the PDF and ZIP files are included in the delivered message.

Note In order for files to be passed through the server, they must match a rule that has the Document Delivery Format set to **Deliver Original Format**.

To enable the Compose Bypass for a composer type:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Components**.
- 3 Double-click on **Compose**.
- 4 Click the **Conversions** tab.
- 5 Click the **New** button. The **New Conversion Rule** page opens.
- 6 Enter a name for the file type that will use the MFP conversion engine.
- 7 In the **Copy conversion rule from** field, click the drop-down arrow and select **mrp via Compose Bypass (Compose Bypass)** as the conversion engine for this type of MRP files.

Note MEDITECH MRP files use the **Compose Bypass** option by default.

- 8 Click **Next** and then **Finish**.
- 9 Click **OK**.

Data Extractor component

Configuring the Data Extractor for Forms recognition

Note A license is required to use the Data Extractor.

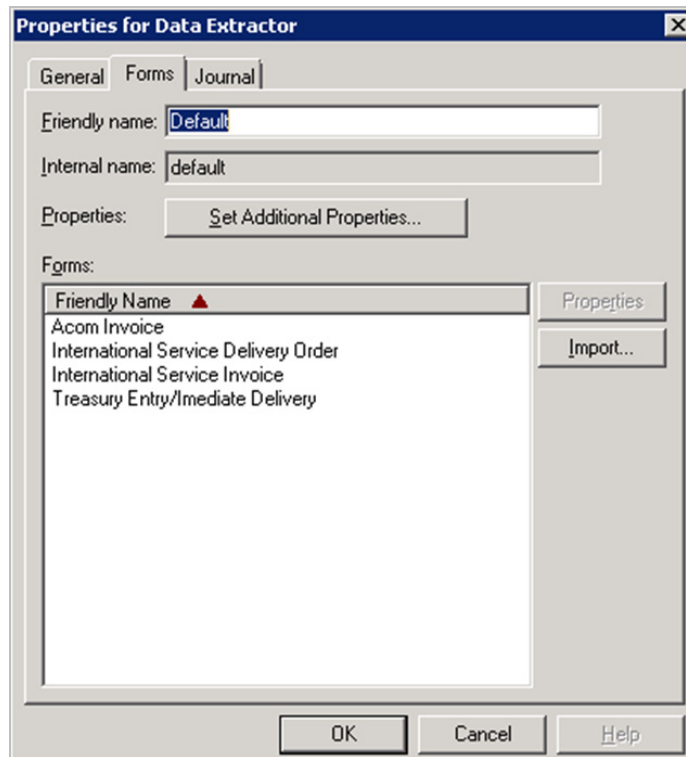
Custom services are required to create the OFD files used in this procedure. For more information, contact Omtool Support at <http://www.omtool.com/support>.

- 1 Copy the sample OFD files to a network folder.
- 2 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 3 In the console tree, expand the AccuRoute Server Administrator and navigate to **Components**.
- 4 Double-click on **Data Extractor** to open the **Properties** page.
- 5 Click the **Forms** tab.
- 6 In the **Friendly name** text box, enter the name **Default**.
- 7 Verify the internal name is **default**.
- 8 In the **Forms** section, click **Import**.
- 9 Browse and select the forms from the network folder where you copied the OFD files.
- 10 Click **OK** to save the files. They are listed in the **Forms** section. After you have finished configuration, the Property page will look similar to the image below.

See also [TEXT PDF form identification and Zonal Field Extraction](#), which follows this procedure.
- 11 Click **OK** to save your changes to the Data Extractor component.

Updates to the Data Extractor component include:

- [TEXT PDF form identification and Zonal Field Extraction](#) (43)
- [QR barcodes](#) (44)



TEXT PDF form identification and Zonal Field Extraction

The capabilities of the Data Extractor Component have been extended to support Text PDF form identification and Zonal Field Extraction.

ZonalForms identify the Text based PDF using a set of one or more locations (for example, Page number and PDF coordinates on the page) and a regular expression to match the extracted text against. If the set matches then it is assumed the form is properly identified.

The Default Form Library is automatically created during installation. The Omtool Administrator can manage the Forms in the Default Form Library via the Forms tab in the Data Extractor Component Properties page. However, the Administrator cannot add or remove Form Libraries.

Note For this release, we only support single page form per job being attached.

To set data extraction, you can use a control file and set:

```
prDataExtraction = Mode  
ZonalForms = 8
```

QR barcodes

The Data Extractor Component has been enhanced to support the detection of QR barcodes within documents. The Data Extractor component can be set with a Regular Expression designed to detect a preset value in the third party vendor barcodes. This allows for the extraction and mapping of barcode data from documents that pass through AccuRoute. Using Regular Expressions, the Data Extractor allows the AccuRoute server to read and process barcoded cover sheets (or separator pages) generated by third party systems.

To set data extraction you can use a control file and set:

```
prDataExtraction = Mode
```

where Mode is the sum of one or more of the following:

None = 0,

Barcode1D = 1

Barcode2D_PDF417 = 2

Barcode2D_DataMatrix = 16

Barcode2D_QR = 32

For example, to extract 1D,2D and QR barcodes set:

```
prDataExtraction=33
```

Maintenance archive supports regular expressions

You can add a regular expression as criteria for the Maintenance Archive:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Components**.
- 3 Double-click on **Maintenance**. The **Properties for Maintenance** page opens.
- 4 Click the **Archive** tab.
- 5 Click **Add** and select the type of archive to create. Click **Next**. The **Archive** page opens.
- 6 Select options in the **Type of message to archive** section, as appropriate.
- 7 Optionally, select the **Message must also match expression** option and enter the expression. You can click **Insert** for a list of properties.
- 8 Click **Next**.
- 9 You can specify the document type(s) to store in archive. Click **Next**.
- 10 Continue to define the archive, as appropriate.

Enhancements to the Image-In Queue component

The Image-In Queue Component has been enhanced to validate all required properties of a queue that have no specific validation criteria for validation. If a property, therefore has no criteria, it will be marked valid.

The new validation rules can potentially alter some existing workflows that were created with the assumption that a required property without validation is invalid until it is manually configured in the Image-In Queue Client. The workaround to correcting any altered workflow is to have a length requirement for that property during validation.

Enhancement to the AccuRoute component: Image-In Queue

Administrators now have the ability to set property values as part of the Image-In Queue workflow action. The Queue Workflow Rules Properties dialog has been modified to include a new “Set Additional Properties” button.

When configuring a queue workflow, the Administrator can specify configured properties with values to be applied to a queue after an action is executed.

Note The values will be set after the action is applied. The values will support substitution.

Virtual queues

AccuRoute v4.0 introduces a new category of queues called virtual queues. The Administrator will need to provide a name, an associated e-mail as well as the base queue (non-virtual) name to use as a template for the virtual queue. The virtual queue then inherits all its properties from the non-virtual queue dynamically.

Virtual queues can minimize administrative overhead costs by allowing the Omtool Administrator to modify only the base queue to apply changes and all associated virtual queues will automatically inherit and reflect these changes.

To an end user, a virtual queue will appear as an actual queue.

Creating a virtual queue

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and right-click on **Queues**.
- 3 Select **New > Virtual Queue**. The **Properties for Queue** page opens.
- 4 In the **Name** field, enter a descriptive name for the Queue (for example **Processor**).
- 5 In the **E-mail** field, enter an email address for the person who will manage the queue.
- 6 Select a queue on which to base the virtual queue. The virtual queue will dynamically inherit all its properties from the base queue.
- 7 Click **OK** to create the Queue.

Rules

Delivery failure notification option for outbound rules

A new option in the auto-generated Queue rule provides for notifications to be delivered if a message fails to be submitted to a configured Queue.

Existing Queue rules must be manually set with this notification option:

- 1 Open the queue rule.
- 2 On the **Specify the Actions to take for this Rule** dialog, select the action and click **Properties**,
- 3 Enable the **Notify originator on failure** option.
- 4 Click **Finish**, **Next**, **Next**, and **Finish** to complete this setting.

New criteria for routing rules: Job properties match expression

You can configure inbound and outbound rules so that when a job matches an expression, it is routed to the specified location.

Previously, you could only configure rules to match a specific criteria, for example if sender email is `iiq@yourcompany.com`, then route documents to Image-In Queue. The advantage of creating a rule with an expression is that it allows you to specify any job property as the matching expression including custom property dictionary items as well as the template variables for a job. For example, you can specify that all jobs coming from a specific Device IP Address must be routed to repository “xyz” for storage (in this case, the Device IP Address is the matching expression which will trigger the job to be routed to the destination “xyz”).

Moreover, when prompts are configured for a job, you can create rules to route to destinations based on the prompt value entered by an user.

Creating the outbound rule in which Job Property matches an expression

The example below shows how to configure an outbound rule matching an expression in which the documents are routed to a destination. (In this example, the destination is the OpenText RightFax server.)

To create the outbound routing rule for RightFax:

- 1 Verify that the RightFax connector is in place and make a note of the name of the RightFax server as specified in the connector. (For instructions on how to create the connector, see [Adding an AccuRoute connector for OpenText RightFax](#) (15).
- 2 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 3 In the console tree, expand the AccuRoute Server Administrator and navigate to **Rules**.
- 4 Click **Outbound**.
- 5 Right-click on **New > Rule**. The **Specify the Criteria for this Rule** page opens.
- 6 Click **Add**. From the **Add Rule Criteria** page, select **Job properties match expression**.
- 7 Click **Next**. The **Property Expression** page opens.

- 8 In the **Name** text box, and enter a descriptive name for the rule (for example, **RightFax rule**.)
- 9 In the **Expression** text box area, enter the expression. For example, if the name of the RightFax server as defined in the connector is RightFax001, enter:

```
\\prServerName="RightFax001"
```
- 10 Click **Finish**, then **Next**. The **Specify the Actions to take for this Rule** page opens.
- 11 Click **Add** and in the **Add Rule Action** page, select **Route to Connector**. The **Route to Connector** page opens.
- 12 From the **Route to Connector** drop-down, select the RightFax connector (for example, **RightFax**).
- 13 Click **Finish** to close the **Route to Connector** page and click **Next**.
- 14 Do not add any failover action and click **Next**.
- 15 Verify the **Enable this rule** option is selected.
- 16 Verify the **Stop processing other rules** option is selected.
- 17 Click **Finish** to complete configuring the rule.

Note Property Dictionary Items (PDI) must be created for all fields that need to be queried for data collection. For information on how to create Property Dictionary Items, see the [Configuring Message Property](#) topic in the [Omtool Server Administrator Help](#) (accessed through the [AccuRoute v4.0 documentation](#) page).

Volume Lists

Enhanced logging with Volume Lists

Document action logging has been enhanced with the ability to restrict what logging is generated based on a regular expression. Enhanced logging supports actions when an item has been cancelled, modified, deleted, or moved to processed in the Administrator.

To enable logging:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and right-click on **Volume Lists**.
- 3 Select **Properties**.
- 4 On the **Logging** tab, select the **Enable collection of document actions** option.
- 5 Click the **Advanced** button.
- 6 Click the **Insert** button.
- 7 Select the property that needs to be available in order for logging to be generated. Click **OK**.
- 8 Click **OK** to complete the procedure.

If you are creating your own database, you will need to complete the following in order to capture the Recipient ID of the message:

- Set up the action log table to have a column \\prLogDetails\prRecipientGUID NVARCHAR(MAX)
- Define a Property Dictionary Item for RecipientGUID = prRecipientGUID
- Verify that the volume for ObjectArchive has RecipientGUID.selected in the indexing

Volume List Extensions

The AccuRoute server has been enhanced to support Volume Lists for the following repositories in addition to ObjectArchive.

- Microsoft SharePoint
- Autonomy iManage WorkSite
- FileShare
- NetDocuments

This enhancement allows the Administrator to create custom document processing workflows, or use Omtool packaged workflows to send documents to the repositories.

The metadata search capability is enabled and works as before. Users can perform a search in the AccuRoute Web Client and pull back matching documents seamlessly without regard as to where it is stored.

Important Only those jobs that have been processed by the AccuRoute server and use the indices defined for the Volume are searchable from the AccuRoute Web Client.

Configuring Volume List Extensions involves the following:

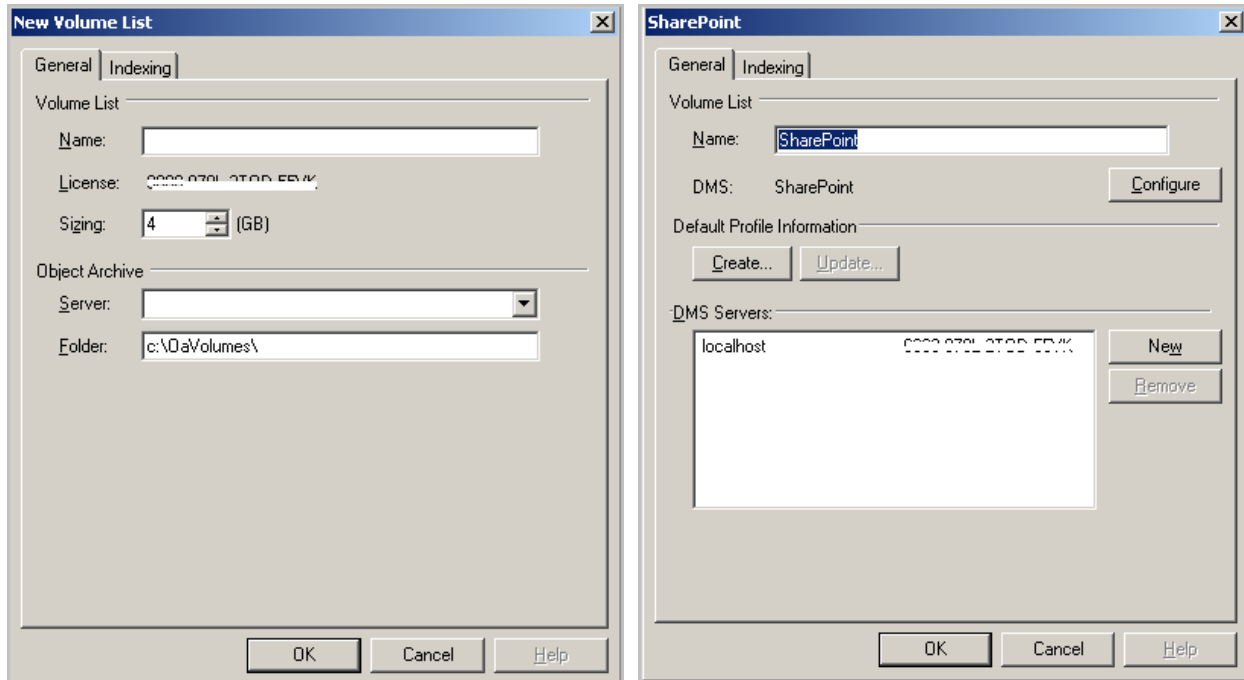
- [Creating a Volume List](#) (48)
- [Adding the AccuRoute connector for a Volume List](#) (50)
- [Configuring Queue properties](#) (53)

Creating a Volume List

Note A valid license is required to create a Volume List.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and right-click on **Volume Lists**.
- 3 Select **New Volume List using**.
- 4 Select an option to indicate where you want to create the Volume List. The options are **ObjectArchive**, **FileShare**, **SharePoint** and **WorkSite**. (You will see the **WorkSite** option only if Autonomy iManage WorkSite is installed on your system.)

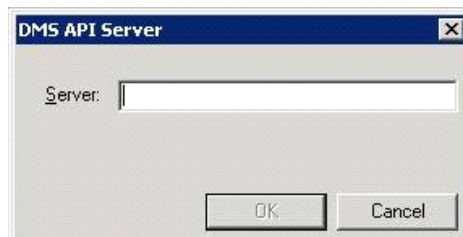
- 5 If you selected **ObjectArchive**, the server opens the **New Volume List** page. If you selected any other DMS option, the Volume List property page opens with the DMS name (such as **SharePoint** below).



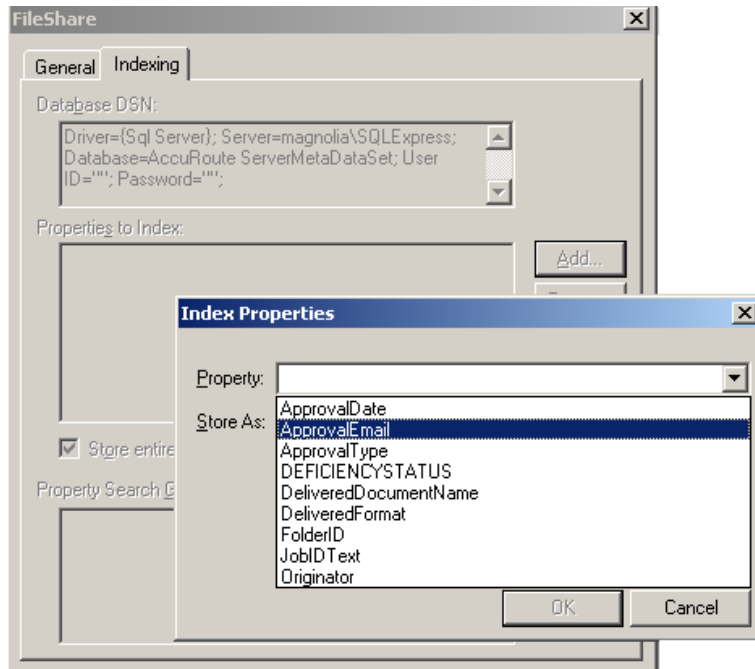
- 6 If you are configuring ObjectArchive, go to step 7.
For any other DMS type, configure the Volume List property:
- a If you are configuring a DMS, click **Configure** and continue configuring as necessary.
For example when creating a Volume List in SharePoint, click **Configure** and follow DMS specific configuration process. (You are presented with the same dialog as when creating an AccuRoute Connector for DMS). Next, you are prompted to create a Default Profile. These configurations are necessary as they are the basis for how and where items will be stored into the DMS.

Note You will not be able to click **OK** and close the Property dialog until you have configured the DMS and created the default profile.

- b Next configure the **DMS Servers** section. By default 'localhost' is added to the list of DMS servers. This is the system the AccuRoute server will use to process DMS API calls for improved scalability.
- c Click **New** to open the **DMS API Server** page.



- d In the **Server** text box, enter the server name. This is the name of the host where the DMS Libraries are installed for use (The machine can be configured with the DMS Libraries by installing the AccuRoute Connector for DMS).
- 7 Click **Indexing** to open the Indexing tab.

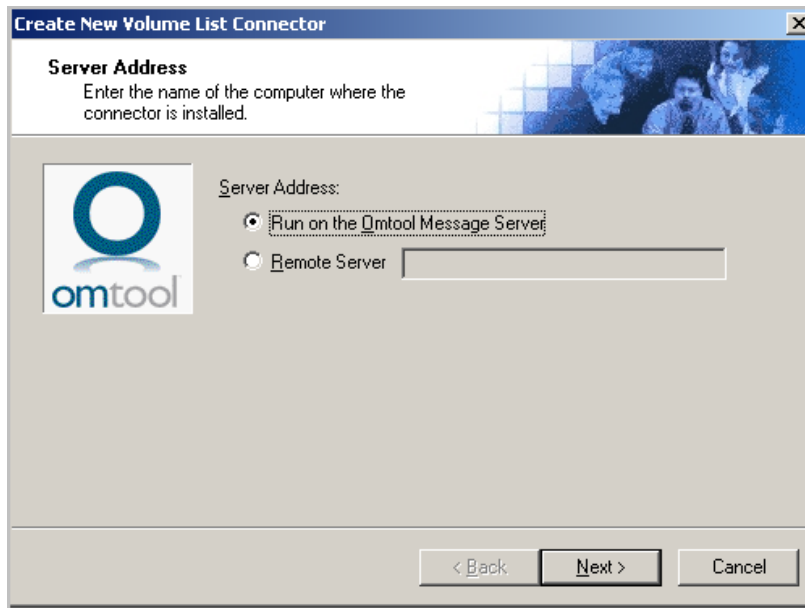


- 8 Select from the **Property** drop-box the message properties for indexing.
- 9 Click **OK** to add the properties and close the **Indexed Properties** page.
- 10 Continue with the next procedure, [Adding the AccuRoute connector for a Volume List](#).

Adding the AccuRoute connector for a Volume List

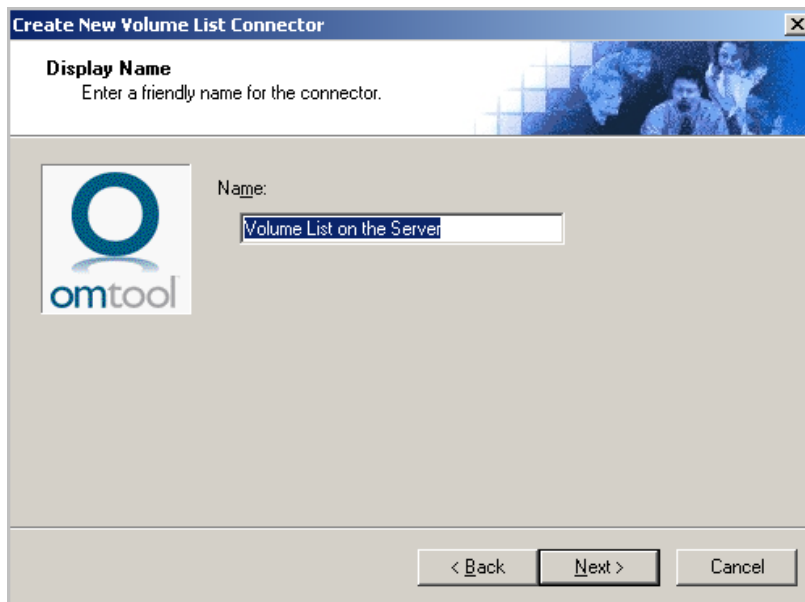
- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and right-click **Connectors**.

- 3 Select **New AccuRoute Connector for > Volume List**. The **Server Address** page opens.



The screenshot shows a dialog box titled "Create New Volume List Connector" with a close button (X) in the top right corner. The main heading is "Server Address" with the instruction "Enter the name of the computer where the connector is installed." Below this is the Omtool logo. To the right of the logo, the text "Server Address:" is followed by two radio button options: "Run on the Omtool Message Server" (which is selected) and "Remote Server" (which is unselected). A text input field is positioned to the right of the "Remote Server" option. At the bottom of the dialog box, there are three buttons: "< Back", "Next >", and "Cancel".

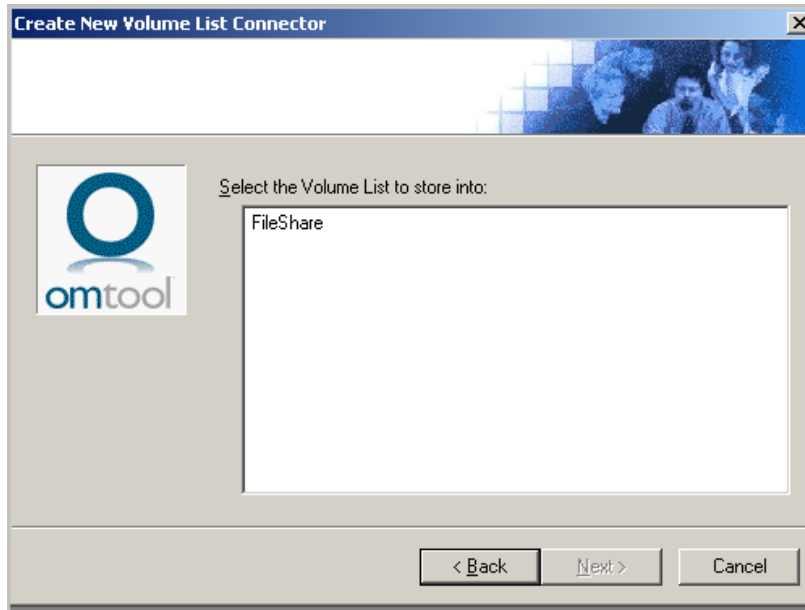
- 4 Click **Next**. The **Display Name** page opens.



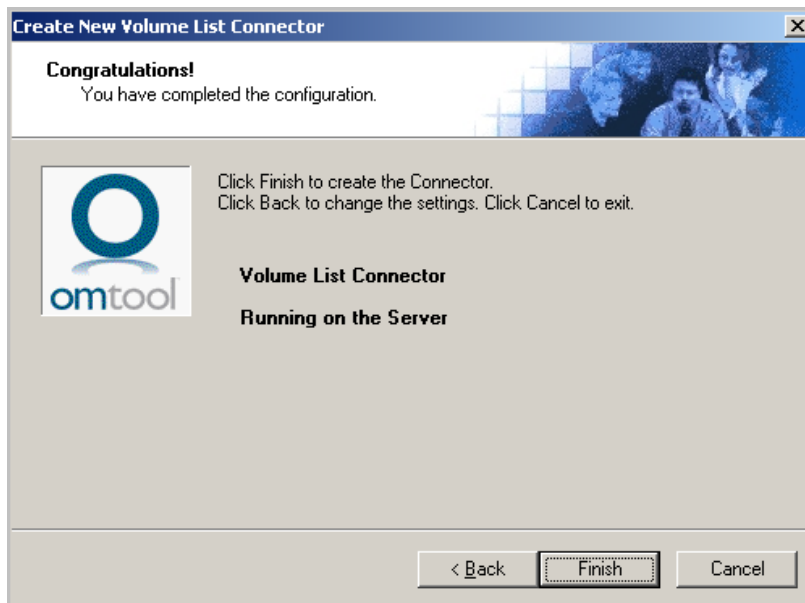
The screenshot shows the same dialog box titled "Create New Volume List Connector" with a close button (X) in the top right corner. The main heading is "Display Name" with the instruction "Enter a friendly name for the connector." Below this is the Omtool logo. To the right of the logo, the text "Name:" is followed by a text input field containing the text "Volume List on the Server". At the bottom of the dialog box, there are three buttons: "< Back", "Next >", and "Cancel".

- 5 Enter an appropriate name for the connector or keep the default **Volume List on the Server**.

- 6 Click **Next**. The **Select Volume List** page opens.



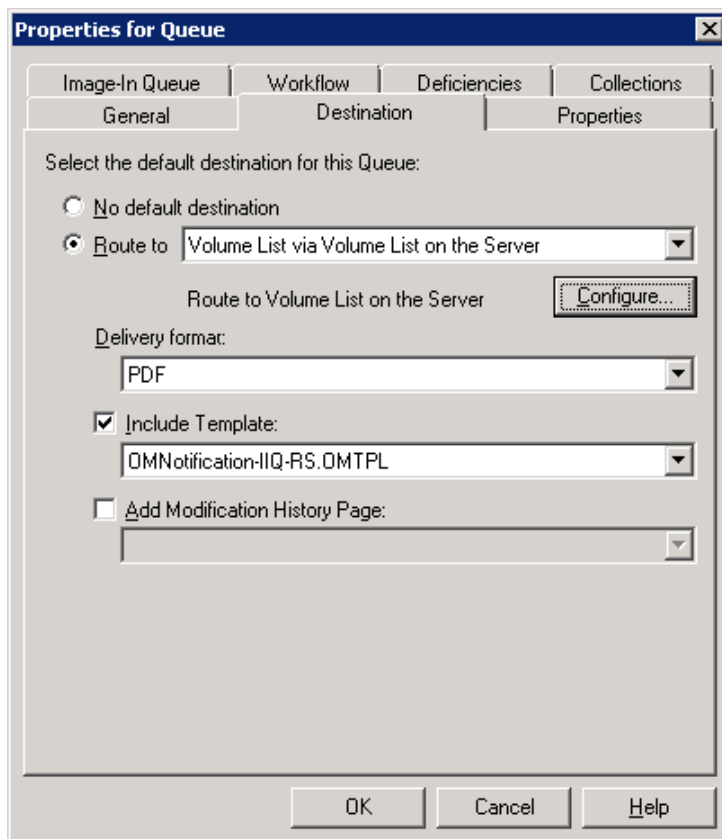
- 7 Select the Volume List where the documents should be routed to and stored.
- 8 Click **Next**. Configuration is now complete and the **Congratulations** page opens.



- 9 Click **Finish**. The connector is now listed in the details pane.
- 10 Continue with the next procedure, [Configuring Queue properties](#).

Configuring Queue properties

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and right-click on **Queues**.
- 3 Select **New > Queue**. The **Queue Properties** page opens.
- 4 Select the Queue that you will use to route documents.
- 5 Click **Destination** to open the **Destination** page.
- 6 Select the **Route to** option and from the drop down list, select **Volume List via Volume List on the Server** option.
- 7 Click **Configure** to route documents to the Volume List on the server.



- 8 Click **OK** to save your changes.

Volume List Restrictions

The Volume List Restrictions feature allows the AccuRoute Server Administrator to restrict user access to certain types of documents in a Volume. This is useful in situations where only designated users should be able to access specific documents. For example, companies dealing with health care records frequently have specific patient forms or records that users must be authorized to access.

In prior AccuRoute versions, access to documents stored in a volume was based solely on the Active Directory Group membership criteria. Under this approach, users could access all or none of the documents stored in a volume.

By configuring Volume List Restrictions, the Administrator can restrict the actual documents that a user can retrieve and view. Moreover, since the AccuRoute Web Client search will return restricted and not all available documents, companies are no longer required to purchase or maintain multiple volumes for storing different categories of data. The result is easier data maintenance, efficient use of storage space and optimized search results.

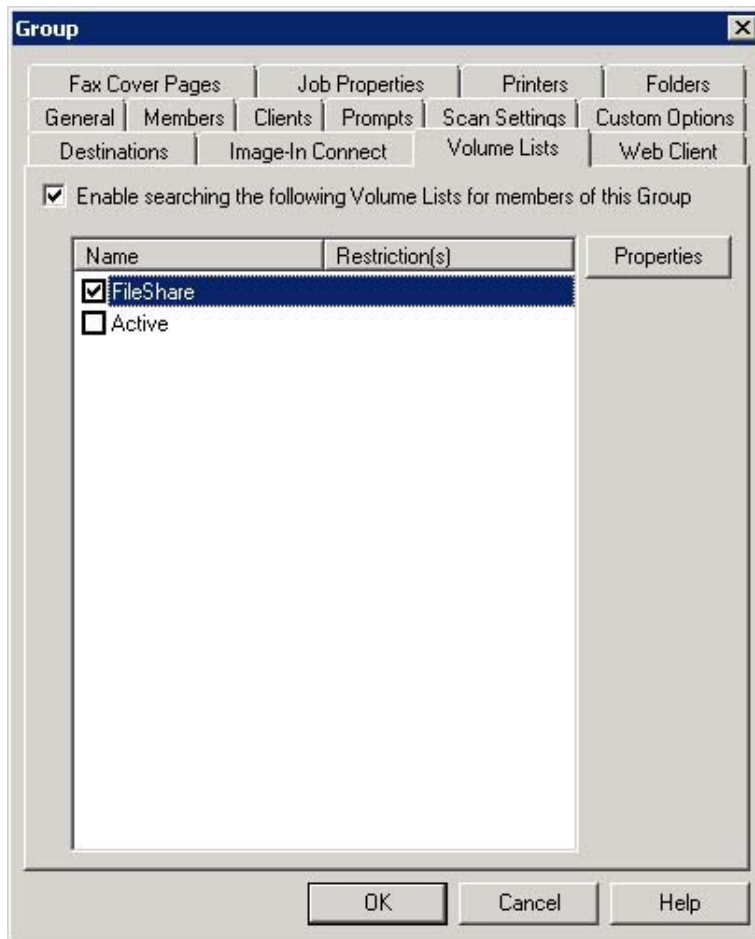
Note Currently, Volume List restriction is applicable to AccuRoute Web Client searching only. It is not applicable to searches from the Image-In Queue client.

Note The Property Dictionary Item used in a restriction must be indexed in the specified Volume List as well as in the Active Volume List. For information on how to create Property Dictionary Items, see the [Configuring Message Property](#) topic in the Omtool Server Administrator Help. For information on how to index properties for messages, see the [Creating Volume List](#) topic in the Omtool Server Administrator Help.

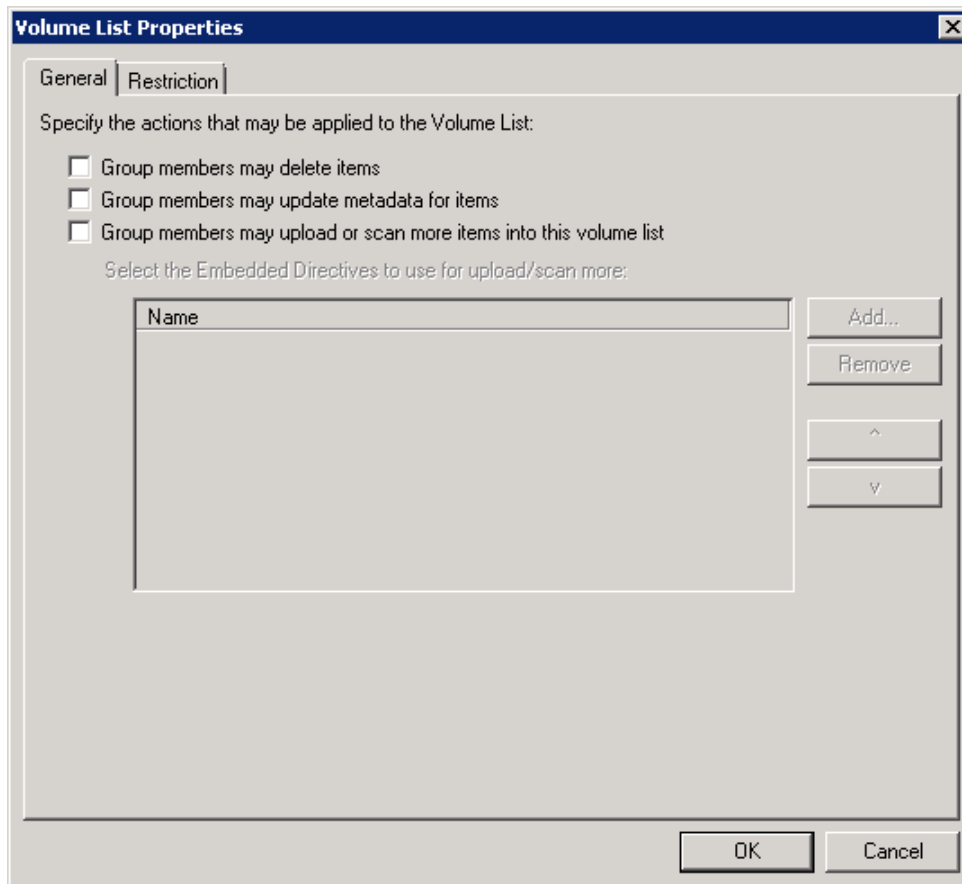
Configuring Group restriction when accessing a Volume List:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration > Groups**.
- 3 Double-click on the group for which you are configuring Volume List restriction. This opens the **Properties** page for that group.
- 4 Click **Volume Lists** to open the tab.
- 5 Select the **Enable searching the following Volume Lists for members of this Group** option.

- 6 Select the Volume List for which you are configuring the restriction.



- 7 Click the **Properties** button. The **Volume List Properties** page is displayed.



- 8 You can indicate that:
 - ▶ Group members may delete items
 - ▶ Group members may update metadata for items
 - ▶ Group members may upload or scan more items into this volume list

If you select the third option (**Group members may upload to scan more items into this volume list**), you can select the Embedded Directives (Distribution Rules) to use for upload/scan more. To do so, click the **Add** button. The **Select Embedded Directive** page is displayed. Search for and then select the rule to add.

Title ▲	Owner	Created	Last Used	Single Use	Expires
---------	-------	---------	-----------	------------	---------

- 9 Click the **Restriction** tab on the **Volume List Properties** page.

Enter the restriction for searching this Volume List:

Insert...

OK Cancel

10 Enter the restriction criteria by inserting OPath [operator] VALUE clauses.

The criteria you enter can be a complicated expression that includes parenthesis and operators. The operators are limited to equals (=), not equals (<>), less than (<), greater than (>), is in (= [item1, item2, item3, item(n)], is not in (<> [item1, item2, item3, item(n)]), as well as AND/OR operators.

Note Any OPath you enter manually that does not belong to a property that is currently indexed for the selected Volume List will generate an error message when you click **OK** on the Volume List Search Restriction page.

11 Optionally, click the **Insert** option to open the **Select The Property To Insert** page. This page displays a list of configured Property Dictionary Items you can select for the restriction.

12 Select the property from the list.

13 Click **OK** to close the **Select The Property To Insert** page.

14 Click **OK** to close the **Volume List Search Restriction** page.

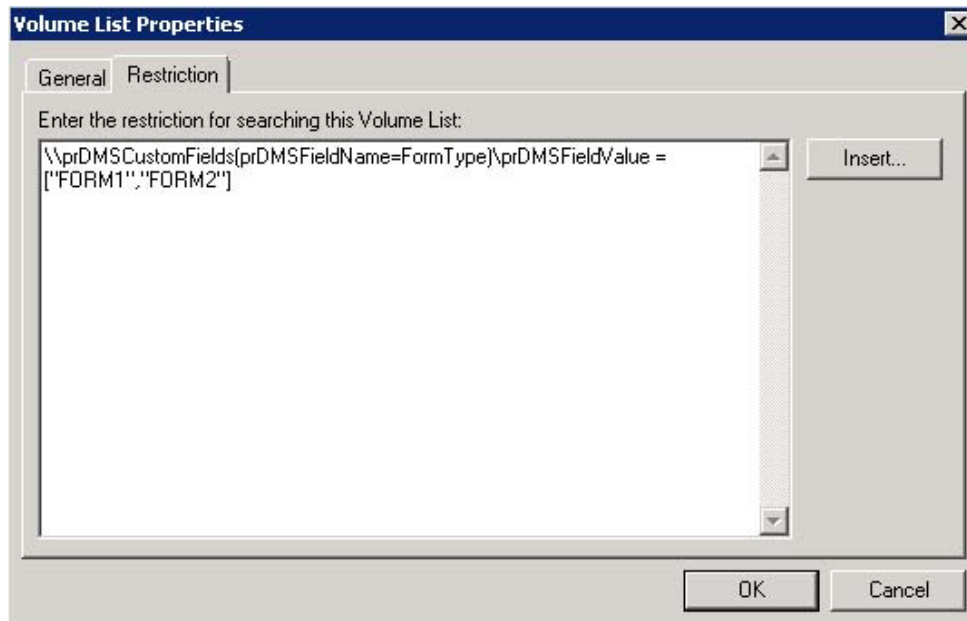
15 Click **OK** to close the **Group** properties page.

After a property is selected for insertion, the first OPath in its mapping list, will be inserted into the restriction edit box where the cursor is currently located. You can setup criteria similar to:

```
\\prDMSCustomFields(prDMSFieldName=PrimaryKey)\prDMSFieldValue <>
"PRIVATE"
```

which would return results only where PrimaryKey is not equal to PRIVATE.

You can also setup criteria by Form Types. For example:



This example would only return documents where FormType is either FORM1 or FORM2.

Document Action Log

The Document Action Log feature allows you to record and log into an SQL table, all information related to document/record access by a user using the AccuRoute Web Client. The SQL table is created by default in the AccuRoute Archive Database and is named "ActionLog".

Historically, user access to documents via the AccuRoute Web Client is captured through the job activity logs associated with individual jobs. However, limitations with internal format of data storage meant that this data was not easily accessible. The Document Action Log feature now allows the Administrators to use familiar reporting tools to monitor and report on user/document activity.

This is particularly useful to companies within the Healthcare environment where Administrators are routinely required to trace users who have accessed a specific document or set of documents, as well as all the documents a specific user may have accessed, for HIPPA compliance reasons.

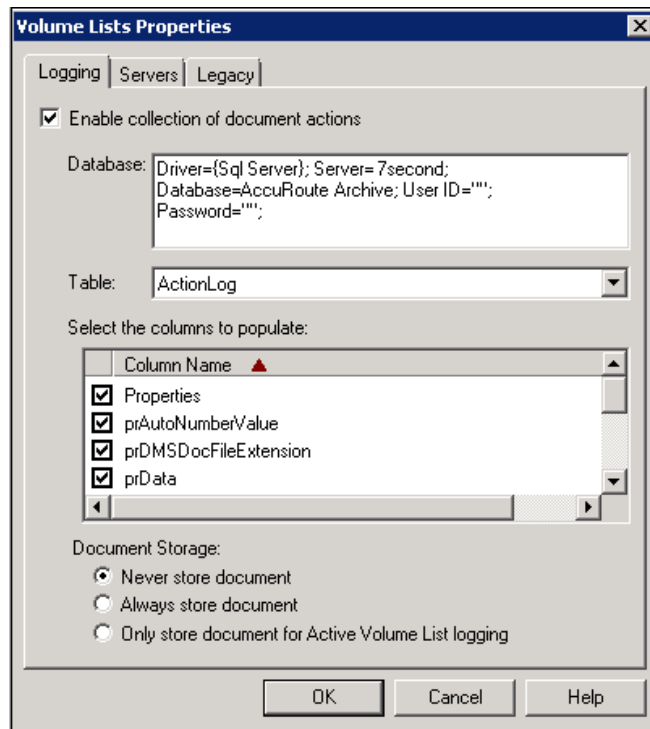
The SQL table ActionLog, can be moved to any location accessible by the AccuRoute server. The management of the schema should be done by the AccuRoute Server Administrator via normal SQL database table management. (In this sense, its management is similar to management of the Billing/CostRecovery table.)

Note The ActionLog table is updated only when a user searches for or views configured Volume Lists using the AccuRoute Web Client v4.0. As the user selects to view (either implicitly or explicitly) a document contained in a Volume List then an entry is made into the ActionLog table.

Configuring the Document Action Log

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and right-click on **Volume Lists**.
- 3 Select **Properties** to open the **Volume Lists Properties** page.
- 4 The **Logging** tab enables you to manage the database connection to the document action log table.

- 5 Select the **Enable collection of document actions** option and verify that the **ActionLog** table is selected in the **Table** drop-down menu.



Note By default, the data ActionLog feature is enabled. You can disable it if you do not require log document access.

- 6 All columns listed in the **Select the columns to populate** section are selected by default. Table 2 shows the columns that must be selected.

Table 2: Required columns for configuring the Document Action Log table

Columns	Supported Value	Limited To	Description
Properties	NTEXT		The entire set of properties for the audit log are stored as an XML blob.
prAutoNumberValue	Integer, Identity		This is used to guarantee ordering as date created is not precise enough.
prDateCreated	Date/Time		The date and the time the entry was made.
prGUID	NVARCHAR	36 characters	This is the unique identifier for this entry.
prLogSource	NVARCHAR	12 characters	This is the identifier for the source of the entry from AccuRoute Web Client.

Table 2: Required columns for configuring the Document Action Log table

Columns	Supported Value	Limited To	Description
prLogType	NVARCHAR	12 characters	This is the Type of entry being made. SRCH:AVIEW - Log entry was made when the user searched and the first item was auto-selected SRCH:VIEW - Log entry was made when the user searches and they manually selected the document to view
prServerName	NVARCHAR		This is the name or IP Address of the system from where the user logged into the AccuRoute Web Client.
prUserName	NVARCHAR		This is the name of the user (domain/user in most cases) for whom the e log entry should be made.

- e Select the **DMS Custom Field** option. In the text box, enter the property name (AccountNo, etc.). Click **OK**.
- f Click **OK**.
- 7 Create a MEDITECH connector. To do so, right-click on **Connectors** and select **New AccuRoute connector for > MEDITECH**.
- 8 Create a Filescan connector To do so, right-click on **Connectors** and select **New AccuRoute connector for > Filescan**.
Set Filescan to **Virtual** mode.
- 9 Create a volume list to ObjectArchive. To do so, right-click on **Volume Lists** and select **New Volume List using > ObjectArchive**.
Index the four properties (created in Step 3). Add all properties to indexing on Active and other Volume Lists.
- 10 Create IIQ Queue:
 - a Have the default route to the Volume List.
 - b On the **Notifications** tab, select **MEDITECH**.
 - c Create a workflow rule to have all inbound messages match and auto-route to the default rule.
- 11 Using Filescan, add a control file to match the IIQ rule.
- 12 Go into the **Queues** to open the **Properties for Queues** page. Click the **Notifications** tab and the **Advanced** button. Set a FirstByte and starting value for the MEDITECH key.

If you have an **existing** AccuRoute installation:

- I In addition to the existing properties AccountNo, MedRecNo, and ExternalKey, you need to create another property called ExternalKeyEnd. To create this property:
 - a Right-click on **Properties > New > Property Dictionary**.
 - b In the **Name** text box, enter:
[ExternalKeyEnd](#)

- c In the **Label** text box, enter the property label.
 - d In the **Mappings** section, click **New**.
 - e Select the **DMS Custom Field** option. In the text box, enter the property name (AccountNo, etc.). Click **OK**.
 - f Click **OK**.
- 2 Because you now have a new property, a SQL script must be run in order to update your database. You must call Omtool Customer Support to complete this update.

Important Messages will not be delivered to MEDITECH if the SQL script is not run on the database.

Optional configuration for the Fax Hold and Release button

In order to support the Fax Hold and Release button for AccuRoute Embedded Device Client for HP OXPd 1.6.4 and HP OXPd v1.4.4, a new property dictionary item must be created to filter the pending jobs for each destination fax number as it is listed in the Destination Translation Table (DTT).

This configuration involves:

- Creating the Fax Hold and Release property (prDestinationFaxNumber) dictionary item
- Configuring the Active volume list

To create the prDestinationFaxNumber property:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration**.
- 3 Right-click **Properties**.
- 4 Select **New > Property Dictionary**. The **Property Dictionary Item** page opens.
- 5 In the **Name** text box, enter the metadata field name.
- 6 In the **Label** text box, enter a suitable label.
- 7 In the **Instructions** text box, enter any needed instructions.
- 8 Verify that the **Type** is set to **Text**.
- 9 In the **Mappings** section, click **New** to open the **Property Definition** page.
- 10 Select **Property Name** option and enter:
`prDestinationFaxNumber`
- 11 Click **OK** and then **OK** again to create the property.

To configure the Active volume list:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Configuration > Volume Lists**.
- 3 Double-click the **Active** volume list to open the **Active** properties page.
- 4 Click the **Indexing** tab.
- 5 In the **Properties to Index** section, click **Add**. The **Index Properties** page opens.
- 6 Select from the **Property** drop-box the same property that you created in the previous procedure.
- 7 Click **OK** to close the **Index Properties** page.
- 8 In the **Property Search Groups** section, click **Add**. In the **Name** text box, enter:
`prDestinationFaxNumber`
- 9 Select **Add**, then select **prDestinationFaxNumber**. Click **OK** and then **OK** again.
- 10 Click **OK** to close the **Active** page.

Omtool Client Updates

Client versions

Client versions for AccuRoute v4.0 are:

Table 4: Client versions

Client	Version
AccuRoute Desktop	4.0
AccuRoute Web Client	4.0
Server Monitor	4.0
Image-In Connect	4.0
Image-In Queue	4.0
Cost Recovery	4.0
Extensions for DM	4.0
Extensions for iManage	4.0
Extensions for SharePoint	4.0
Extensions for ProLaw	4.0
FaxService Receiver	4.0
FaxCenter	4.0
Print to AccuRoute	4.0
HP OXP v1.4	1.4.4
HP OXP v1.6	1.6.4

AccuRoute Desktop Client

AccuRoute Desktop Client is an intelligent client side application that resembles a desktop email client. Using AccuRoute Desktop, users can create Distribution Rules and Routing Sheets and use them to streamline their common document routing practices.

AccuRoute Web Client

AccuRoute Web Client features

AccuRoute Web Client is an intranet-based web application that provides network users a convenient method of creating document distributions (Distribution Rules), generating Routing Sheets, and sending messages.

Note AccuRoute Web Client is now cluster aware. For instructions on how to configure the AccuRoute Web Client for failover, consult the refer to the [AccuRoute v4.0 Server Installation Guide](#) accessed through the [AccuRoute v4.0 documentation](#) page.

AccuRoute Web Client includes:

- Ability to search a Volume List using a date range as search criteria.

If the Date/Time property is indexed on a volume, the AccuRoute Web Client search page will show a single edit box where the user can specify the date range as the search criteria.

- Ability to delete a record found via the Archive Search option.

The AccuRoute Web Client user can select one or multiple records and delete the records from future searches. This will not actually delete the record, it will simply mark it as deleted in the Volume List so that users will be able to see them.

Note Delete can only be applied to non-Active Volume Lists. Any item in an Active Volume Lists would need to be removed via Image-In Queue Client.

The Omttool Administrator must grant the permission to delete records to an AccuRoute Web Client user. If the permission is not configured, the user will not see the Delete option on the AccuRoute Web Client.

- Ability to scan/upload additional documents via the Archive Search option.

The AccuRoute Web Client user can scan additional documents using the Archive Search option. To submit additional documents, the user will select an item from the search result and click the Scan Additional/Upload Additional button. A routing Sheet is generated and the additional documents are routed to the volume where they are associated with the original document by copying their metadata.

The user can only submit additional documents to associate with one search record. If the user selects more than one item, it will result in an error.

- Ability to correct returned meta data

The AccuRoute Web Client user can correct incorrectly indexed records. The Archive Search results page has been enhanced to have an Edit button to allow the AccuRoute Web Client users to correct incorrect metadata.

The Omttool Administrator must grant the permission to edit records to an AccuRoute Web Client user. If the permission is not configured, the user will not see the Edit option on the AccuRoute Web Client.

Scan to My Files feature allows AccuRoute users to scan and route documents to themselves. In the AccuRoute Web Client application, the user will access the Scan to My Files page and create My Routing Sheet. Using this Routing Sheet, all documents scanned at a device will be routed to the Scan to My Files page. Users can then route the document to a repository for storage or send them to other fax or e-mail recipients for further processing as needed.

Web Client archive search now supports the ability to indicate if multiple versions of a document are available and to expand the view to display these other versions.

The Web Client archive search page has been expanded to include the ability to order the search fields and group them accordingly.

Destination Translation Table (DTT)

Note The DTT setup requires that you have DTT Administrator options. Refer to [Configuring Group permissions to allow the user to view Administrator options for the Destination Translation Table \(DTT\) in the AccuRoute Web Client \(13\)](#).

The DTT is used to define routing features for a specific device. With these features, you can:

- Hold all jobs for an indefinite period of time. The “hold” is specific to a fax number. You also can release all jobs using a PIN associated with the fax number.
- Create and use a “release” calendar to specify times during which all fax jobs will be released.
- Match the fax to a specific device printer. You can match the fax number to an IP address to reduce the cost of fax-to-fax transmission.
- Specify the device paper tray used to print inbound fax messages.
- Apply a Document Stamp (“top line”) on an internal fax.
- Route using the RightFax feature.

Procedures for creating calendars and using DTT features are provided below.

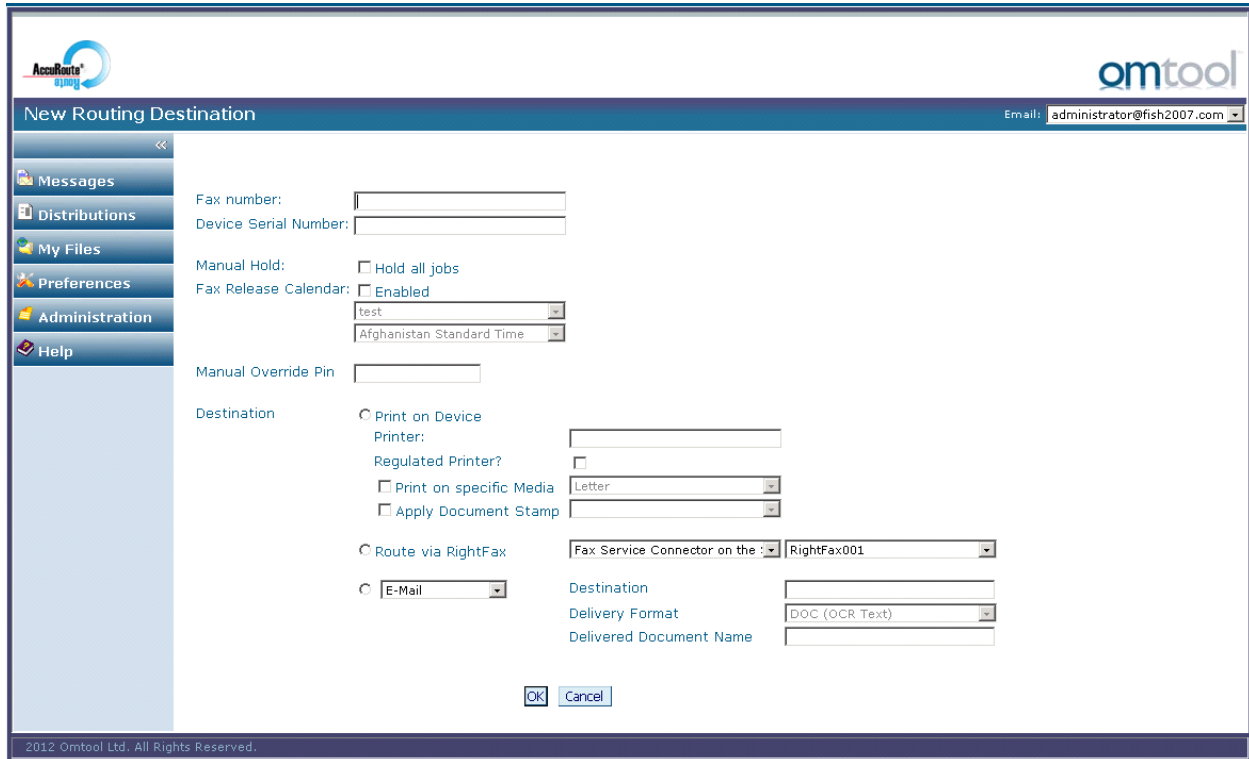
Creating release calendars

Release calendars are used when defining a routing destination (described in the next section). Times specified on a calendar indicate when faxes are released. For example, if the calendar is set as Monday through Friday, starting in the morning at 8:00 and ending in the afternoon at 5:00 (17:00), faxes will be released only during that time period.

- 1 In the AccuRoute Web Client, click the **Administration** tab. Then, click **Calendars**.
- 2 Click **New**.
- 3 Enter a name for the calendar in the **Name** text box.
- 4 Select start and end times for Monday through Friday.
- 5 Optionally, select the **Saturday** option and enter start and end times. (If this option is not selected, Saturday is not included in the calendar.)
- 6 Optionally, select the **Sunday** option and enter start and end times. (If this option is not selected, Sunday is not included in the calendar.)
- 7 Click **OK**.

Creating the DTT Table (adding devices)

- In the AccuRoute Web Client, click the **Administration** button. Then click **New**. The **New Routing Destination** page opens.



- Enter the following information:

- ▶ **Fax Number** - Enter the fully normalized fax number (for example: +10005551234).\
- ▶ **Device Serial Number** - Enter the serial number for the device.
- ▶ **Manual Hold** - Select the **Hold all jobs** option if all jobs to this device number are to be held indefinitely. If you select this option, enter in the **PIN** text box the PIN value to be used to enable or disable the Manual Hold feature.

If there are multiple fax numbers associated with a device, each fax number will need a separate PIN.

If a device is manually put on hold, it will not release jobs until this feature is disabled (the option is not selected). You must enter the applicable PIN to deselect the option.

- ▶ **Fax Release Calendar** - Select the **Enabled** option if you want to specify a date on which all fax jobs will be released. Select the **Calendar** and **Time Zone** from the drop-downs.
- ▶ **Destination** - Select either of these options:
 - ▶ **Print on Device Printer** - Enter the device IP address or the UNC path to the device. You can select the **Print on specific Media** option to choose the paper tray used to print incoming faxes. An inbound fax message is queued for a matched device or printer and then printed using a specified paper tray during the time specified with the release calendar.

You also can select the **Apply Document Stamp** option to include a “top line” on an internal fax.

- ▶ **Route via RightFax - Select the AccuRoute Connector for RightFax** in the first drop-down menu and then select the server address of the RightFax Server from the second drop-down menu.

3 Click **OK**.

To verify that a device was added properly:

- 1 In the AccuRoute Web Client, click the **Administration** tab.
- 2 In the **Find** drop-down on the Routing page, select **Fax Number**. (Optionally, you can select the **Device Serial Number**.)
- 3 Enter the fax number and click **Go**.
- 4 Verify that the DTT entry shows up. For example:

The screenshot shows the 'Routing' page in the AccuRoute Web Client. The search bar is set to 'Find: Fax Number' with the value '+1234567890' entered. The table below shows one item:

Fax number	Device Serial Number	Manual Hold Status	Hold Calendar	
+1234567890	123	Off		Release

Below the table, it indicates '1 Item'.

- 5 Click on the fax number in the table (or the device serial number). The **Routing Destination Properties** page is displayed. Verify the properties for the DTT entry.
- 6 Click **OK**.
- 7 Send a fax (within the release time if a calendar is specified). Verify that the fax is received and printed.

Failover as part of an AccuRoute cluster

AccuRoute Web Client is now cluster aware. You can configure the AccuRoute Web Client to fail over as part of an AccuRoute cluster following the instructions below.

- 1 Navigate to:

`\Program Files (x86)\omtool\AccuRouteWeb\Configuration`

Open the `AccuRouteWeb.xml` for editing.

- 2 In the Connection section of the xml, add the name of the secondary server in your cluster. For example:

```
<Connection>
  <Server>MAGNOLIA</Server>
  <FailoverServer>HIBISCUS</FailoverServer>
  <Authentication type="Exchange">
```

where MAGNOLIA is the primary server name and HIBISCUS is the secondary server name.

- 3 Save your changes and close the xml file.
- 4 Restart the IIS services.

AccuRoute Client Option Packs

Four AccuRoute Client Option Packs are available:

- [AccuRoute Extensions for OpenText DM](#) (64)
- [AccuRoute Extensions for ProLaw](#) (65)
- [AccuRoute Extensions for Microsoft SharePoint](#) (65)
- [AccuRoute Extensions for HP Autonomy WorkSite](#) (66)

AccuRoute Extensions for OpenText DM

AccuRoute enables OpenText DM users to import hardcopy documents into OpenText DM libraries. The process is driven from the native OpenText DM user interface using its screens and menus. AccuRoute can convert the scanned documents into text-searchable format (PDF or DOC), and then save the resulting document into the proper OpenText DM library, fully profiled and stored alongside other electronic content. Once imported, a user can browse through the document libraries to locate these documents, or use OpenText DM capabilities.

A user within the OpenText DM client interface can select an **Import Scan** option to specify profile information for the document that will be scanned later. When the document is scanned, it is uploaded to OpenText DM in the target folder with the specified profile information. The scan can be accomplished using an MFP or other network-connected scanning device.

The **Send to AccuRoute** option also is available from OpenText DM. With this option, a user can extract one or more documents from the OpenText DM repository and have these documents uploaded and attached to a new message composed using the AccuRoute Web Client.

OpenText DM users can select from the following options to route inbound documents:

- **Create New Routing Sheet** - Create a Routing Sheet from within your OpenText DM document library. You can use the Routing Sheet to scan hardcopy documents from any scan enabled device. The documents are submitted to the AccuRoute server for processing and routing to the OpenText DM repository according to the Routing Sheet instructions.
- **Create Scan Reservation** - Create a OpenText DM placeholder. When a Personal Distribution is selected from the device, the document scans to that placeholder.
- **Open in Web Client** - Submit an electronic document directly from the OpenText DM client to the server.

AccuRoute Extensions for ProLaw

AccuRoute Extensions for ProLaw users can extract meta-data gathered from the standard ProLaw user interface and apply to Image-In Connect IIC actions. The meta-data is extracted with Ratchet-X components that are registered with several ProLaw client fields by default during the installation.

After the meta-data is collected, a ProLaw profile dialog is displayed through a third-party API from Bellefield. This profile dialog will be pre-populated with meta-data that was gathered, if available. The meta-data from the profile dialog is then sent to the IIC actions dialog, which shows the actions that were configured on the AccuRoute server. The following are the supported actions. Depending on your workflow, some of these actions may not be used.

- **Create a scan reservation** - Enables a user to submit documents directly to the ProLaw database after authenticating to the Personal Distribution button. This feature requires an Embedded AccuRoute device client.
- **Create a routing sheet** - Generates a routing sheet that, when placed on top of a document, will import the document to the ProLaw database with the specified meta-data. This feature requires a device client with scan to folder support.
- **Open in AccuRoute Desktop** - Launches the AccuRoute Desktop and automatically adds a ProLaw recipient. This feature requires that AccuRoute Desktop is installed on the client system.

The ProLaw DMS connector is configured on the server (there is no ProLaw client to install in order to configure the connector).

When the message is submitted through the AccuRoute server for processing, the meta-data that was collected during the IIC actions is inserted into the appropriate fields in the imported document in the ProLaw database.

AccuRoute Extensions for Microsoft SharePoint

AccuRoute enables Microsoft SharePoint users to import hardcopy documents into SharePoint libraries. The process is driven from the native SharePoint user interface using its screens and menus. AccuRoute can convert the scanned documents into text-searchable format (PDF or DOC), and then save the resulting document into the proper SharePoint library, fully profiled and stored alongside other electronic content. Once imported, you can browse through the document libraries to locate these documents, or use SharePoint enterprise search capabilities.

Microsoft SharePoint users can select from the following options to route inbound documents:

- **Create New Routing Sheet** - Create a Routing Sheet from within your Microsoft SharePoint document library. You can use the Routing Sheet to scan hardcopy documents from any scan enabled device. The documents are submitted to the AccuRoute server for processing and routing to the Microsoft SharePoint repository according to the Routing Sheet instructions.

- **Create Scan Reservation** - Create a Microsoft SharePoint placeholder. When a Personal Distribution is selected from the device, the document scans to that placeholder.
- **Open in Web Client** - Create a message from within your Microsoft SharePoint document library. The AccuRoute Web Client opens the New Message page showing the message you created. Attach electronic documents to the message and route the message to the AccuRoute Server for processing. The AccuRoute Server uses the instructions in the message to route the documents to the Microsoft SharePoint repository where they are stored at the appropriate location.

After selecting an option, the user is prompted to provide the name, document title, and document format for the inbound document. This is the destination information within the Microsoft SharePoint document library. Once documents are scanned, they are submitted to the AccuRoute server for processing. The AccuRoute server uses the instructions in the Routing Sheet or Embedded Directive and routes the messages to the Microsoft SharePoint repository (via the AccuRoute MS SharePoint connector) where the documents are stored at the appropriate location.

AccuRoute Extensions for HP Autonomy WorkSite

AccuRoute enables HP Autonomy iManage WorkSite users to import hardcopy documents into WorkSite libraries. The process is driven from the native WorkSite user interface using its screens and menus. AccuRoute can convert the scanned documents into text-searchable format (PDF or DOC), and then save the resulting document into the proper WorkSite library, fully profiled and stored alongside other electronic content. Once imported, you can browse through the document libraries to locate these documents, or use WorkSite enterprise search capabilities.

A user within the iManage FileSite or DeskSite client interface can select an **Import Scan** option to specify profile information for the document that will be scanned later. When the document is scanned, it is uploaded to iManage in the target folder with the specified profile information. The scan can be accomplished using an HP MFP or other network-connected scanning device.

The **Send to AccuRoute** option also is available from iManage FileSite or DeskSite. With this option, a user can extract one or more documents from the iManage repository and have these documents uploaded and attached to a new message composed using the AccuRoute Web Client.

HP iManage WorkSite users can select from the following options to route inbound documents:

- **Create New Routing Sheet** - Create a Routing Sheet from within your HP Autonomy WorkSite document library. You can use the Routing Sheet to scan hardcopy documents from any scan enabled device. The documents are submitted to the AccuRoute server for processing and routing to the WorkSite repository according to the Routing Sheet instructions.
- **Create Scan Reservation** - Create a WorkSite placeholder. When a Personal Distribution is selected from the device, the document scans to that placeholder.
- **Open in Web Client** - Submit an electronic document directly from the WorkSite client to the server.

Image-In Acquisition Client

Image-In Acquisition Client is used to scan hard copy documents for use in AccuRoute products such as Image-In Queue.

Image-In Connect

Image-In Connect is an extensive and powerful application that extends AccuRoute to integrate with various line of business applications. It uses a powerful metadata gathering technique to collect metadata from the external application it integrates with. This captured metadata can be used to generate a Routing Sheet which can then be used to route documents to repositories like Microsoft® SharePoint® or ObjectArchive™ where the captured document is stored using the values of the Routing Sheet as indices.

Note When a new Routing Sheet is created from the template, the Routing Sheet is created as the original template user, not as the actual user in Image-In Connect.

For information on how to install and configure the Image-In Connect Client, consult the *Image-In Connect Installation Guide*. For instructions on how to use Image-In Connect within an external application, consult the *Image-In Queue Quick Start Guides*. These documents are accessed through the [AccuRoute v4.0 documentation](#) page.

How Image-In Connect works

The following example will give you an idea as to how Image-In Connect works. In this example, the Omtool Administrator needs to integrate the AccuRoute environment with a Human Resource application. This application contains employee demographic information such as employee name, date of birth, e-mail and or fax number, social security number etc. The purpose of the integration is to collect the employee metadata and use the information to create a Routing Sheet, and then use the Routing Sheet to route documents to a repository using the metadata values as indices.

The integration is easily configured using Image-In Connect where the Administrator simply creates an “Appspace” for the application (with mappings for all the demographic information fields as Xmodel elements) and installs the Appspace on the AccuRoute Server.

Note An AppSpace can be thought of as a document container for RegWins. A RegWin is a set of tabs in the AppSpace that allow the AccuRoute Server Administrator to associate controls on a Windows Application UI in order for the metadata to be captured.

Thereafter, whenever a user brings up the application, the user is presented an Image-In Connect icon in the title bar. When the user activates the icon, Image-In Connect opens, presenting the user with one or several of the Image-In Connect options. (The list of options the user will see, will depend on his configuration). As soon as the user selects the “Create Routing Sheet” option, a Routing Sheet is generated using the metadata from the current contents of the fields that are mapped as Xmodel elements.

Description of each of the Image-In Connect features

- **Create Routing Sheet** - When the user selects the “Create Routing Sheet” option, a Routing Sheet is automatically generated using the metadata from the current contents of the fields that are mapped in the external application. The Routing Sheet can be used for capturing and routing documents to the final destination using the values as indices. Since the Routing Sheet is automatically generated, this process does not require any data entry on the users part. Administrators can configure, to prompt the user for a relevant Routing Sheet name or users can use the default name if desired.
- **Create Scan Reservation** - When the user selects the “Create Scan Reservation” option, a Distribution Rule is automatically generated using the current contents of the fields that are mapped for collecting metadata. Once you save this, the Distribution Rule can be made available on a multifunction peripherals (MFPs) for use.

This method of creating a scan reservation does not require any data entry on the users part. Additionally, the users do not have to save or print a Routing Sheet before walking up to an MFP to scan their document.

This feature provides the same basic capabilities as “Create Routing Sheet” option. However instead of generating a routing sheet, the system creates an Distribution Rule and make it available on a multi-function device.

- **View Linked Documents** - This feature allows the end user in an external application to search for and view all documents previously associated with a field mapped for metadata collection. It invokes the AccuRoute Web Client’s direct search capability where the mapped field is used as the search criteria for finding related documents.

For example, if the end user is in the external application selects the View linked Documents option, and if the employee id is mapped field, then the user will be able to view all documents that were archived via the AccuRoute Web Client that are associated with the employee ID.

- **Open in AccuRoute Desktop** - In cases where more complicated or modified processing is required for document routing, the user will have the option to open the Routing Sheet in the AccuRoute Desktop Client and use of its additional capabilities. When the AccuRoute Desktop Client opens, the metadata currently visible on the external application is automatically transferred and converted into a Routing Sheet.
- **Upload Documents** - When the user selects this option and if the documents being captured already exist electronically, the user has the option to upload the documents directly to the AccuRoute Server for processing, bypassing the scanning step.
- **Link to Queue** - The Link to Queue feature allows the user to apply the metadata from the external application to a job listed in the External Applications folder of the Image-In Queue application.

When the user selects the “Link to Queue” option in Image-In Connect, the Omttool Workflow Integration Application page opens listing all jobs in the External Applications folder. The user can select a job, preview the associated document and click OK to apply the metadata from the external application to the job. The job moves from the External Applications folder of Image-In Queue application and matches the queue workflow rules to its final destination.

For information on how to install and configure the Image-In Connect Client, consult the *Image-In Connect Installation Guide*. For instructions on how to use Image-In Connect within an external application, consult the *Image-In Queue Quick Start Guides*. These documents are accessed through the [AccuRoute v4.0 documentation](#) page.

Image-In Queue

Image-In Queue provides a viable digital alternative to traditional paper based document management and routing systems. It can be deployed as a standalone configuration along with the Image-In Acquisition client or as a component of an enterprise electronic document delivery and management system.

Image-In Queue includes:

- **Ability to automatically select the next record when the Release option is selected** - The selected record is locked so that you have exclusive access to it for modifications.
- **Ability to select and release multiple records simultaneously** - This enhancement allows faster and more efficient record processing in a queue.
- **Ability to select next record** - When a record leaves an IIQ folder after any operation in IIQ or outside of IIQ, if an appropriate next record is available it is automatically selected.
- **Ability to release a record folder** - Image-In Queue v3.1 allows you to select a record folder, right-click and select the Release All option from the drop down menu to release all the records in the folder. The operator can cancel the release after each individual record is processed. In case of invalid data or some other anomaly in a record, the operator will be presented with a reconciliation dialog. When the operator cancels the release of that particular record, the whole release operation is cancelled.
- **Property Expressions feature** - This feature allows a job to be processed based on the on the values of properties. For example, the Administrator can configure jobs to be released from Image-In Queue based on a property expression.
- **Route to multiple Queues for Rescan deficiency** - When a Rescan deficiency is created, a Distribution Rule is created for the Rescan routing sheet, and this Distribution Rule has a recipient that is an IIQ type recipient with a destination of "IIQ".

In this version of Image-In Queue, the Rescan Distribution Rules have the ability to distinguish which Queue it came from and set the destination based on that. The Rescan IIQ recipient is set to the document's queue e-mail address at the time the deficiency is added. In prior Image-In Queue versions, there was no way to route jobs to multiple queues for a Rescan.

- **Route to another Queue** - Image-In Queue allows you to route a job to a different Queue using the action Reassign Queue in a workflow.
- **Validation allows for automatic field formatting** - Administrators can configure a set of property formatters in the Formatting tab of the Property Dictionary Item configuration page in the AccuRoute Server Administrator. The property formatters take a client user's entered value and converts it to another value. The possible formatters are upper/lowercase, add prefix, add suffix, insert characters, replace characters, and remove characters. A formatter is configured with a regular expression to match against and one or more formatting actions to take when a match occurs.
- **Cursor advancement** - The cursor automatically moves to the next document in list view as soon as the previous document has been processed.
- **Support for automatic validation of meta data** - Data no longer needs to be validated manually by opening the Edit Data dialog. If the automatic validation is successful, the jobs are release from the queue.
- Edit Data enhancements:
 - **Edit Data selects first non validated field** - When the Edit Data dialog opens, the cursor is placed in the first field that has not been validated.

- ▶ Edit Data Validation on tab - If an item is configured for validation and for validation pullback, validation occurs when the TAB key is pressed. The green and red check boxes are updated. However, confirmation is not shown until the OK button is pressed.
- ▶ Edit Data controls match their configured types set in the Property Dictionary Item in addition to Edit text boxes.
- ▶ Image-In Queue data entry is streamlined
 - ▲ Edit Data dialog can be shown or hidden through toolbar button or a menu item. You can also click on a page outside of the dialog box without having to close it first.
 - ▲ Edit Data dialog automatically tracks selection of records. The dialog gets disabled if multiple records are selected.
 - ▲ Edit Data dialog is a tool window dialog.
 - ▲ Edit Data dialog remembers its location.
 - ▲ Edit Data dialog has Apply and Reset buttons. These replace the OK and Cancel buttons in previous releases.
 - ▲ Edit Data dialog can be dismissed by clicking on the [X] close button on the window title.
 - ▲ Edit Data dialog provides a way to reconcile changed data when record selection changes. The operator will be prompted to apply the changes or discard the changes.
- ▶ Edit Data dialog allows the operator to paste previously applied data. The operator will use the ALT+ V action to paste the previously applied meta data to proper edit fields. The data is automatically validated and also saved on successful validation.

Any data, copied to the buffer during the process of meta data copy paste operation, is applied to the selected record in the list view. As soon as the data is applied, validation occurs. If there is a problem the Edit Data dialog opens and it shows the error.

Note The data in the buffer comes from the last successful Apply of data from the Edit Data Dialog.

- ▶ Edit Data option is available as a right-click menu option from a folder within in Image-In Queue.
- ▶ Double-clicking a document opens the Edit Data Dialog or transfers focus to an already open Edit Data dialog.
- ▶ Image-In Queue operators can open the Edit Data dialog by pressing the Enter key from the list view.
- ▶ Edit data fields match the required properties for the queue when multiple queues exist.
- ▶ Deficiency enhancements:
 - ▲ The Omtool Administrator can define which deficiencies should be associated with a Queue.
 - ▲ The Omtool Administrator can define which deficiency is the default for a Queue.
 - ▲ The Omtool Administrator can define properties that much be valid for a Queue before a deficiency can be assigned to it.
 - ▲ Batch the deficiency e-mail sent to doctors - Instead of sending a separate e-mail for each deficiency, Image-In Queue allows you to batch the notifications for the patient's chart and send one e-mail at a specific time of the day (for example, at midnight).

- ▶ Image-In Queue operators can now control the placement of the E-signature deficiency. When assigning a deficiency, the operator is now prompted to place the E-signature location annotation in the correct spot before a notification is sent to the assignee.
- ▶ Image-In Queue operators can assign multiple deficiency types in the Deficiency page. In previous versions, they could only assign one type.
- **Queue filter** - When setting up a queue, the Omtool Administrator can define the items that will get listed for display. This includes items that are currently assigned to other queues.
- **Allow read only viewing of a queue** - When setting up a queue, the Omtool Administrator can disable the automatic locking of a document if selected in the Image-In Queue client for modification. Users in Image-In Queue with the read only permissions will be able to read/view documents. They will not have the ability to modify documents.
- **New folder hierarchy structure** - Image-In Queue v3.2 offers a completely configurable mechanism where the Administrator can configure the folder hierarchy to support their workflow specific requirements.
- **Restructuring of automatic subgroup folders** - Administrators can setup folder sublevels where each level is defined by one property.
- **Restructuring Deficiency structure in folder view** - A new Deficiencies folder view has been introduced to allow one row per deficiency, such that jobs with multiple deficiencies will be (n) entries in the listing. This will allow the Image-In Queue operator sorting and grouping capability using the normal list view mechanism.
- **Enhancements to Rescan deficiency processing** - When a rescan job is selected, the IIQ pane will display a side-by-side preview of the original scanned page in the existing preview area with Accept and reject options.
 - ▶ Accept will apply the current processing, updating the original document with the new scanned page. The rescan deficiency will be marked as resolved.
 - ▶ Reject will prompt the IIQ user to see if there is need to re-issue a rescan deficiency (by generating a new routing sheet) or not. In either case the original deficiency will be marked as resolved.
- **Editing metadata at the folder level** - Image-In Queue operators can now set the metadata value at the folder level. The IIQ user will use the CTRL+ V action to paste the previously applied meta data to proper edit fields. The data is automatically validated and also saved on successful validation.

Note The Paste button in the Edit Data dialog applies the previously applied meta data to proper edit fields. However, user will need to manually save the metadata unlike the CTRL+ V action where the data is saved on validation.

- **Handling 'missing-documents' at folder level.**
- **Handle “notes” across documents.**
- **Send to AccuRoute (selected items/folder)** - A new context menu option has been added to both the Folder & Item(s) objects. When selected the AccuRoute Desktop opens and the selected items is attached to the new message. Any metadata available for the selected item are passed to the AccuRoute Desktop. The user can add recipients and send the message. Or the user can save the Distribution Rule for future use.

- **Enhance assign to queue to allow “as copy”** - The **Reassign Selected Item** option has been enhanced to allow the Image-In Queue operator to assign a copy of the selected item rather than moving the actual item to the specified Queue.
- **Streamline splitting a multi-paged document.**
- **Import from ObjectArchive** - The user can search and view documents in ObjectArchive, and then send them back into IIQ for editing if needed.

Notifying the user when a new message is received in the queue

Image-In Queue can issue a new item notification when a new item is delivered to the queue. To configure the Image-In Queue tray menu to notify the user when a new message is received in the queue:

- 1 Open the Image-In Queue client.
- 2 On the **Tools** menu, select **Options**.
- 3 Click the **Desktop Alerts** tab.
- 4 Select the **Display a Desktop Alert notification** option. The user will be notified when a new document arrives.

Inserting an imported document as new or a version

The Image-In Queue feature for Extract from ObjectArchive can now insert as “new” or as a “version of the original” when importing documents back into ObjectArchive.

The system administrator will select which options are available to the user. To do so:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Queues**.
- 3 Select the **Image-In Queue** tab.
- 4 In the **Import Document Options** section, select **Import new document** and/or **Import new document version**.
- 5 If you select both options, specify the default option in the **Default** drop-down.

Displaying the first image in a folder in the results pane

Image-In Queue permissions have an option to automatically display the first image in a folder in the results pane. To configure this option:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Groups**.
- 3 Select the **Queue Access** tab.
- 4 Select **Queue > Properties**.
- 5 Select **Automatically select first document when a folder is selected**.

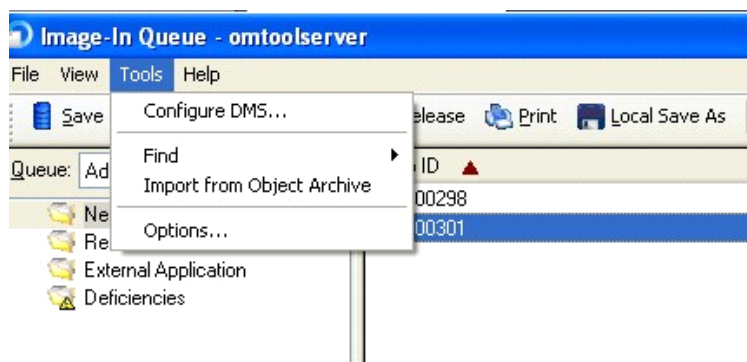
Reassigning a document without viewing permissions

A user can reassign a document to a different queue even if the user does not have permissions to “view that queue.” To configure this option:

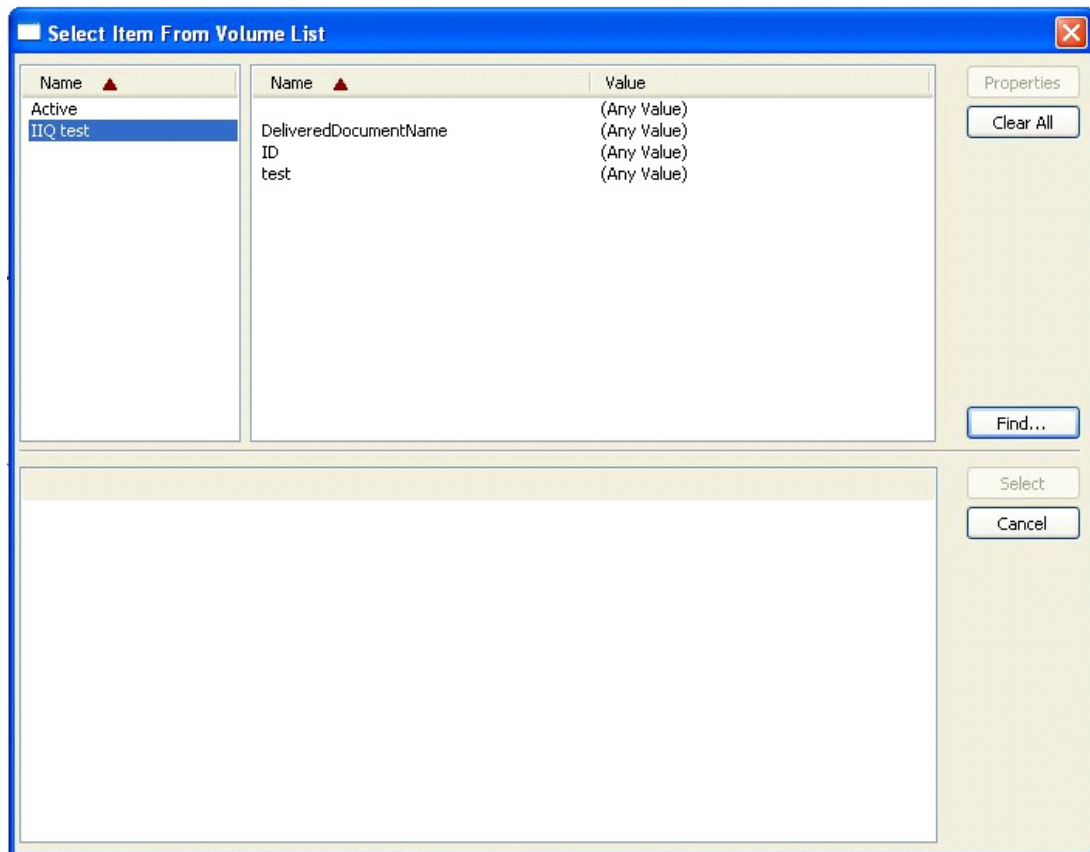
- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server Administrator and navigate to **Groups**.
- 3 Select the **Queue Access** tab.
- 4 Select **Queue > Properties**.
- 5 Select **Allow documents to be reassigned to any queue**.

Importing from ObjectArchive

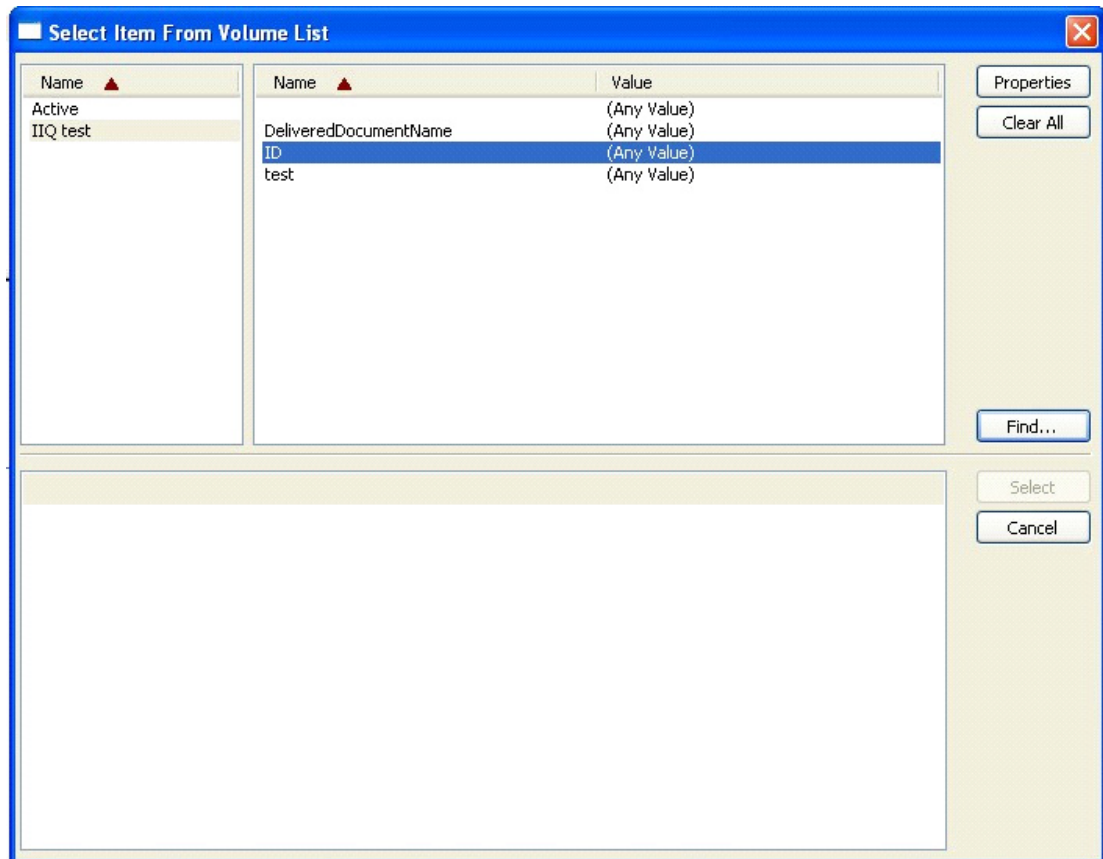
- 1 Follow all installation instructions per the AccuRoute Image-In Queue Online Help (accessed through the [AccuRoute v4.0 documentation](#) page).
- 2 Route a document into **ObjectArchive**.
- 3 To edit a profiled document in ObjectArchive, open the Image-In Queue client and select **Tools > Import for Object Archive**.



- 4 The **Select Item From Volume List** page opens where you can select the ObjectArchive Volume list (**IIQ test**) from which to search.

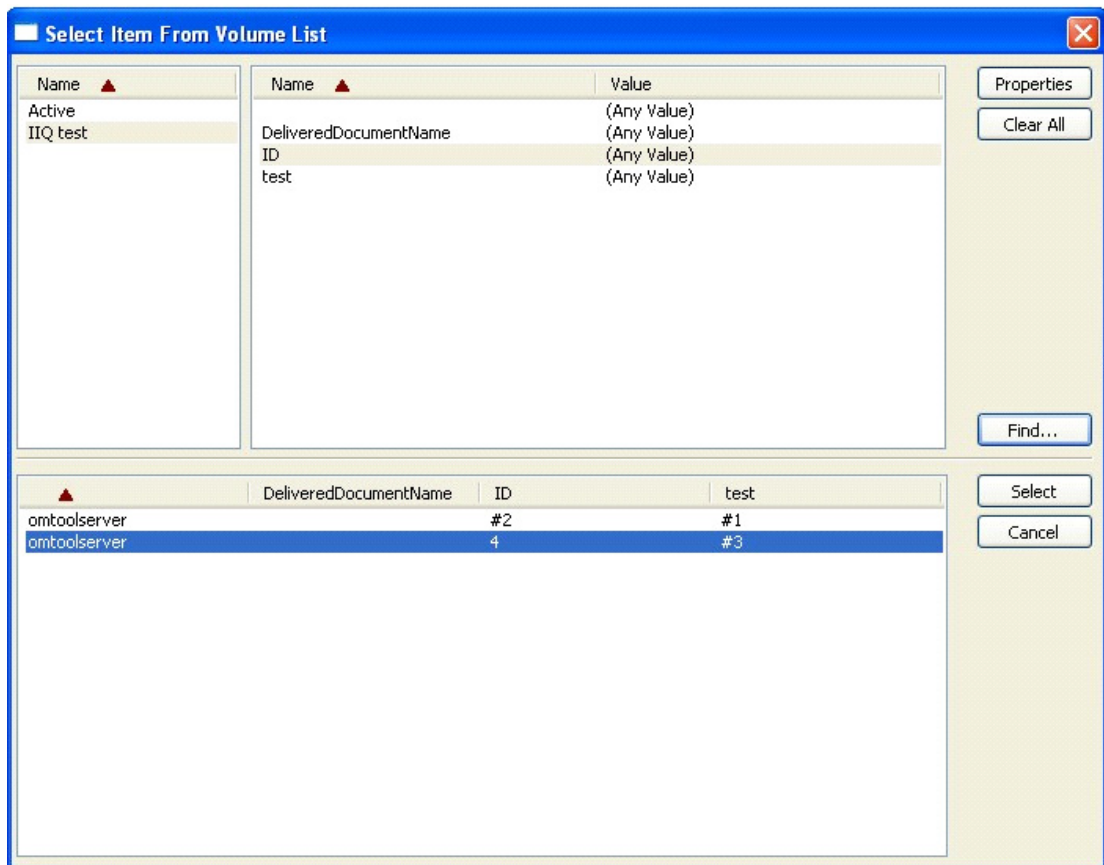


You also can select the documents containing meta-data fields (**ID** and **test**) from which to search.

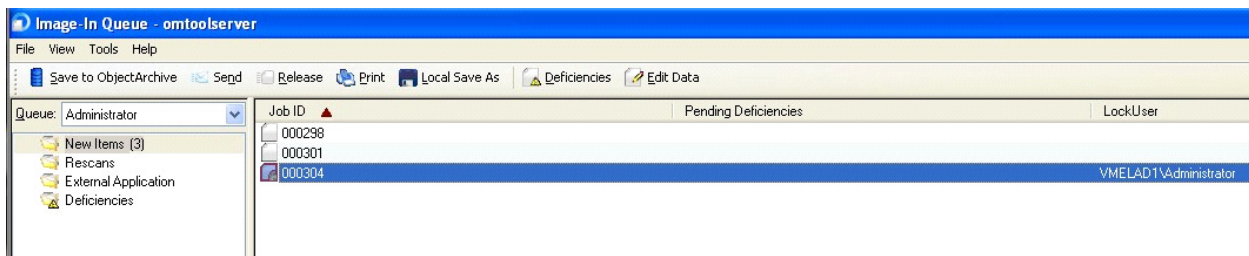


- 5 Once the search criteria is defined, click **Find**.

6 Highlight the document you want to edit or confirm its meta-data. Click **Select**.

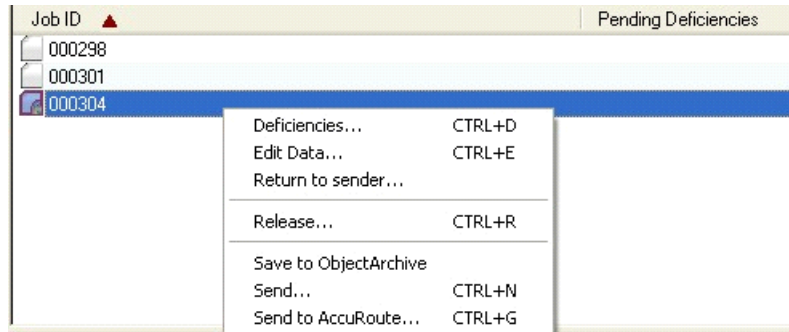


This imports the ObjectArchived document back into the Image-In Queue in the AccuRoute Server. The document can be seen in the IIQ client for editing.

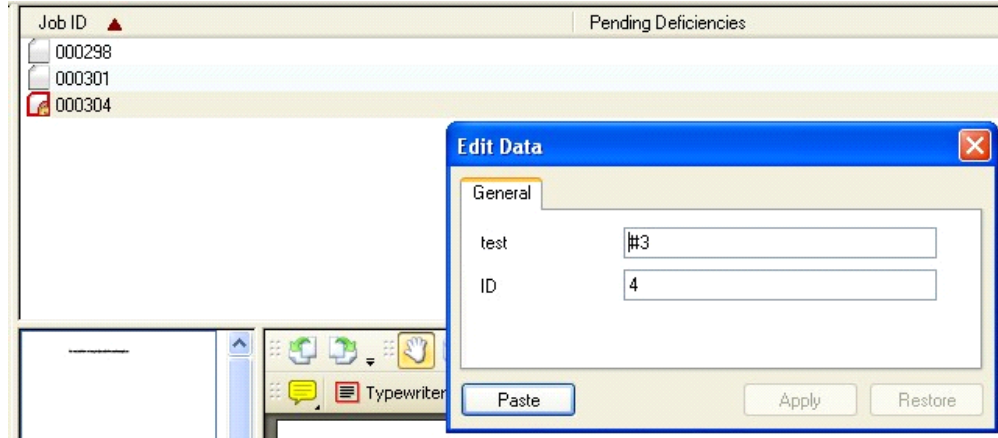


7 To edit meta-data:

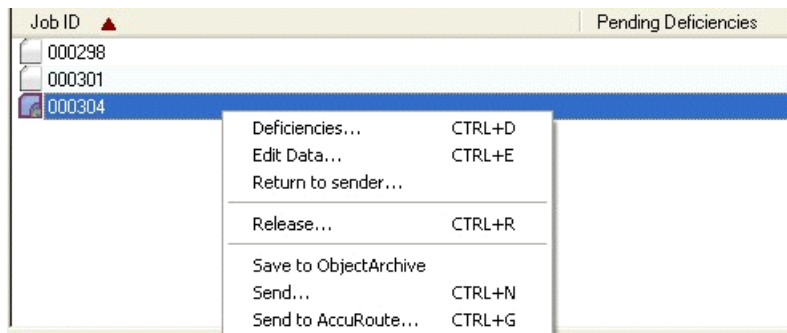
- a** Right-click to select the document. Select the **Edit Data** option.



- b** You can edit the meta-data fields or add annotations. Then, you can resubmit them back into ObjectArchive.



- 8** Right-click to highlight the document that was edited or annotated. Select the **Release** option to send the document back into ObjectArchive.



The AccuRoute Server will process the newly edited document and route it back into ObjectArchive.

Additional Image-In Queue enhancements

Image-In Queue provides these features. The Image-In Queue user can now right-click on a folder and select:

- **Print** to send the contents of the folder to the selected printer.
- **Send to AccuRoute** to add the contents of the folder as attachments in AccuRoute Desktop Client.
 - ▶ Image-In Queue now supports “multi-select” for files in a folder. In previous versions, only one file could be selected at a time.
 - ▶ The user can right-click and generate a Routing Sheet from a folder containing all of the collection level properties.
 - ▶ When “reassigning” to a different queue, the user can to set multiple properties, making this a one-step process.
 - ▶ In the folder tree of previous versions of Image-In Queue, the document or folder currently selected was highlighted in very light gray. It is now highlighted in dark gray.
 - ▶ A user can clear a drop-down property in Image-In Queue (such as dates), so that a blank option is selectable.
 - ▶ Changes to the column widths are retained within all folders in a collection.
 - ▶ A new right-click option, **Bulk Folder Changes**, enables the user to release or reassign multiple folders at the same time (rather than one at a time).
 - ▶ When **Release** is selected, all documents that have been selected are processed at one time.
 - ▶ When **Reassign** is selected, the user is given options for selecting the queue and properties to be modified.
 - ▶ The **Extract Pages** dialog has been updated with **Undo** and **Redo** buttons.
 - ▶ Hover-over tool tips are now supported for the contents of a column in the document list.
 - ▶ The **Enter** key on the **Edit Data** dialog now represents “paste” rather than “apply.” There is now an option to disable/remove this on configuration.
 - ▶ The **Extract Pages** dialog has new buttons that support moving a selected thumbnail image to the beginning or end in the extraction screen.
 - ▶ The **Extract Pages** dialog has enhanced scroll options when moving thumbnail images within the window. When a page is moved to the top or bottom of the **Extract Pages** dialog, the window will scroll with the selected page.
 - ▶ The **Extract Pages** dialog now supports multiple thumbnail pages to be selected and dragged for repositioning.
 - ▶ AccuRoute now supports the functionality of matching new documents with existing documents in Image-In Queue. When a user selects a document from the **New Items** queue or any folder in Image-In Queue and selects the **Match documents** option, the user can select the folder to which the originally selected document will route.

Omtool Workflow Integration Application

The Omtool Workflow Integration Application includes:

- Support selection of a folder versus an individual item.
- Support filtering based on passed-in criteria (such as user or client).

Print to AccuRoute

Print to AccuRoute allows users to print any document to the AccuRoute PDF printer, which makes a .pdf version of that document. Then the system opens the .pdf file in either the AccuRoute Desktop or Web Client, where it is available to be sent to recipients or addresses, just like any other message.

With Print to AccuRoute, users can take advantage of AccuRoute messaging capabilities for file formats not typically supported. The Print to AccuRoute installation offers two choices:

- Print to AccuRoute Desktop
- Print to AccuRoute Web Client

Fax Service Provider (FSP) Receiver

Before you install the FSP Receiver, make a note of the UNC path specified for the Common Pickup Folder, located on the Advanced tab in the AccuRoute Connector for Fax Service Provider. You will be prompted for this information during the FSP Receiver installation.

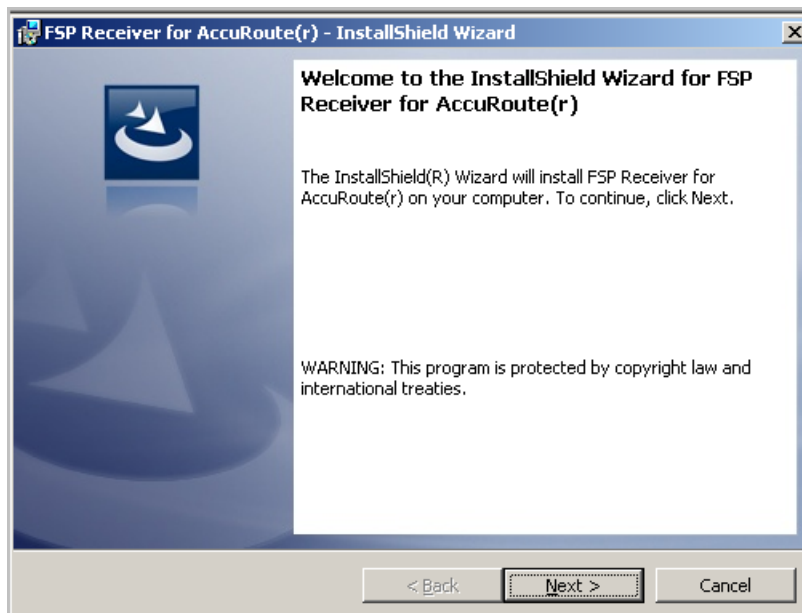
- 1 On the server create the following directory:

```
C:\Program Files (x86)\omtool\Omtool Server\omFSPReceiver\
```

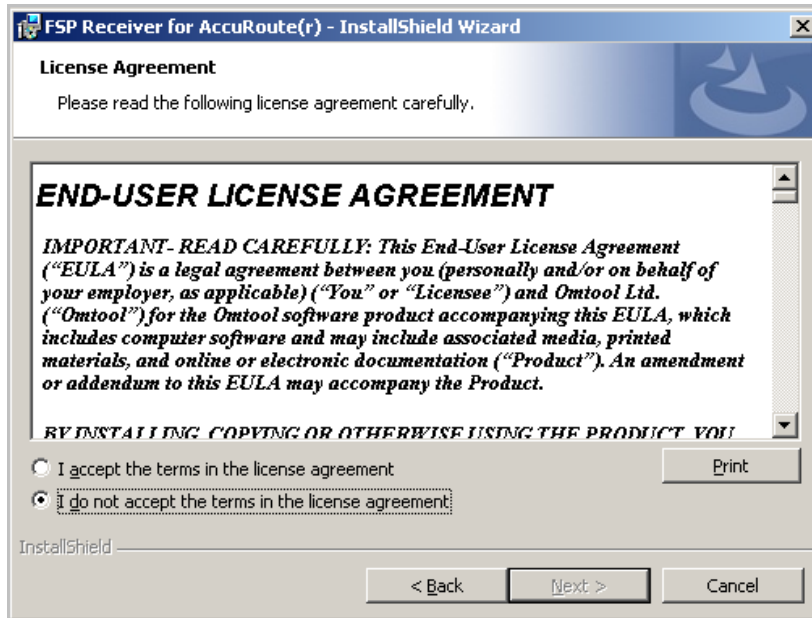
- 2 Navigate to the AccuRoute Clients share folder and then go to the FSPReceiver folder with the setup files:

```
C:\Program Files (x86)\omtool\Omtool server\Clients\FSPReceiver
```

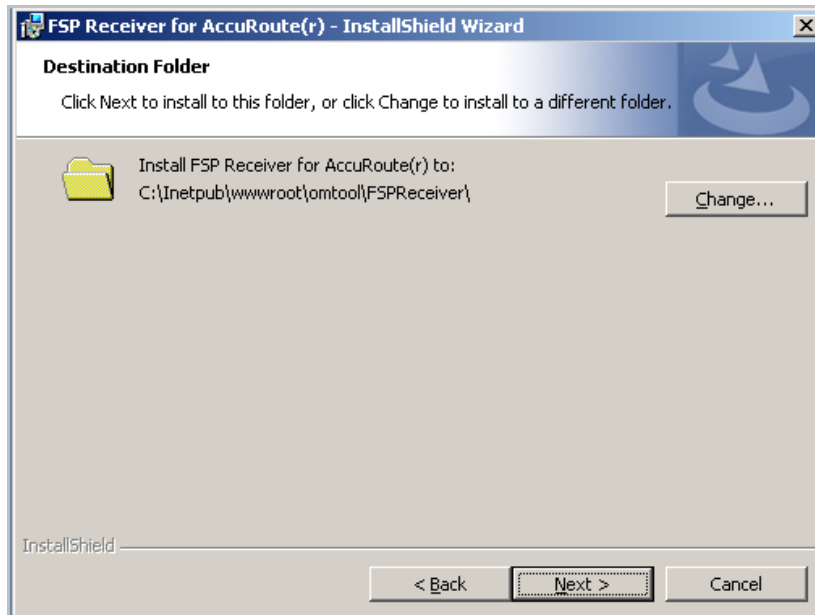
- 3 Double-click `setup.exe` to install the application. The InstallShield Wizard configures your system for installation and shows the **Welcome** message.



- 4 Click **Next**. The **License Agreement** page opens.

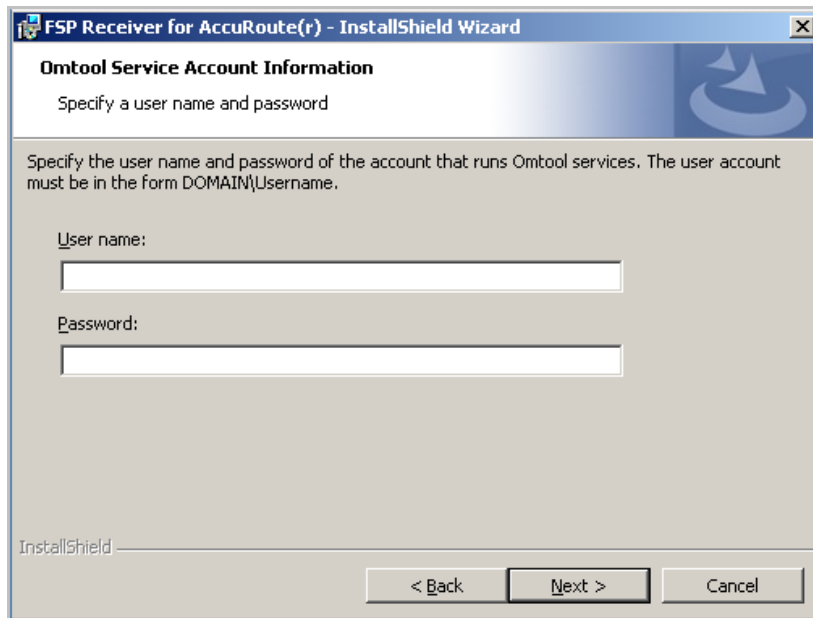


- 5 Read the license agreement and if you agree to the terms, click **I accept the terms in the license agreement** option.
- 6 Click **Next**. The **Destination Folder** page opens.



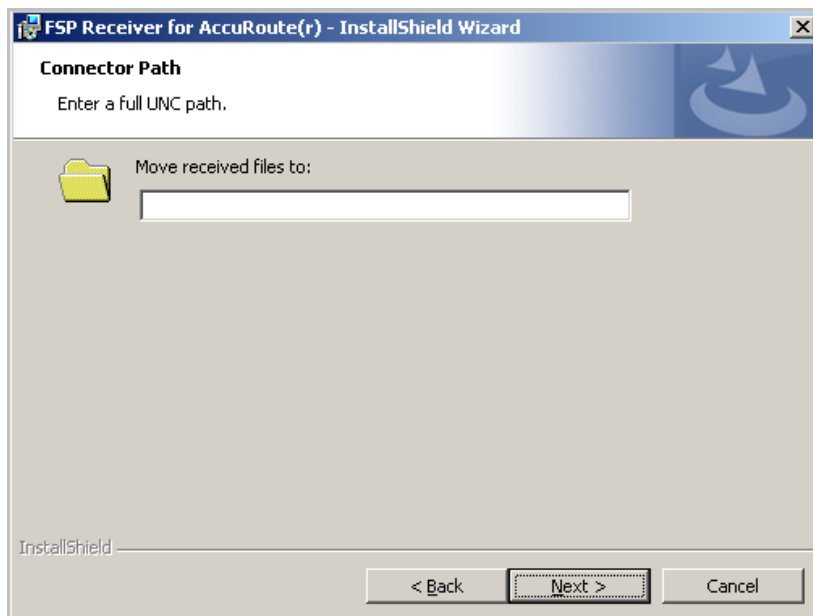
- 7 Install to the **omFSPReceiver** directory you created in Step 1 by browsing to:
[C:\Program Files \(x86\)\omtool\Omtool Server\omFSPReceiver\](C:\Program Files (x86)\omtool\Omtool Server\omFSPReceiver\),

- Click **Next**. The **Omtool Service Account Information** page opens.



The screenshot shows a Windows wizard window titled "FSP Receiver for AccuRoute(r) - InstallShield Wizard". The main heading is "Omtool Service Account Information" with the instruction "Specify a user name and password". Below this, a text box explains: "Specify the user name and password of the account that runs Omtool services. The user account must be in the form DOMAIN\Username." There are two input fields: "User name:" and "Password:". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted with a dashed border.

- Enter the service account credentials (**User name** and **Password**).
- Click **Next**. The **Connector Path** page opens.



The screenshot shows the same wizard window, now on the "Connector Path" page. The instruction is "Enter a full UNC path." Below this, there is a folder icon and the text "Move received files to:" followed by a text input field. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted with a dashed border.

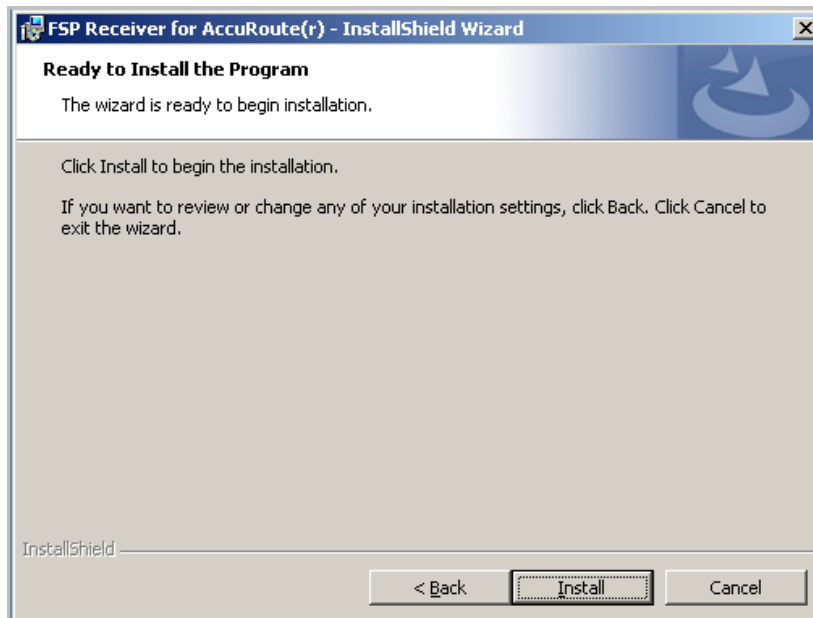
- Provide the UNC path for the share as found in the EasyLink connector properties, Advanced tab, listed as the Common pickup folder. For example:

```
\\{Server_name}\OMTOOL\WORK\FSP\EasyLink\PICKUP\
```

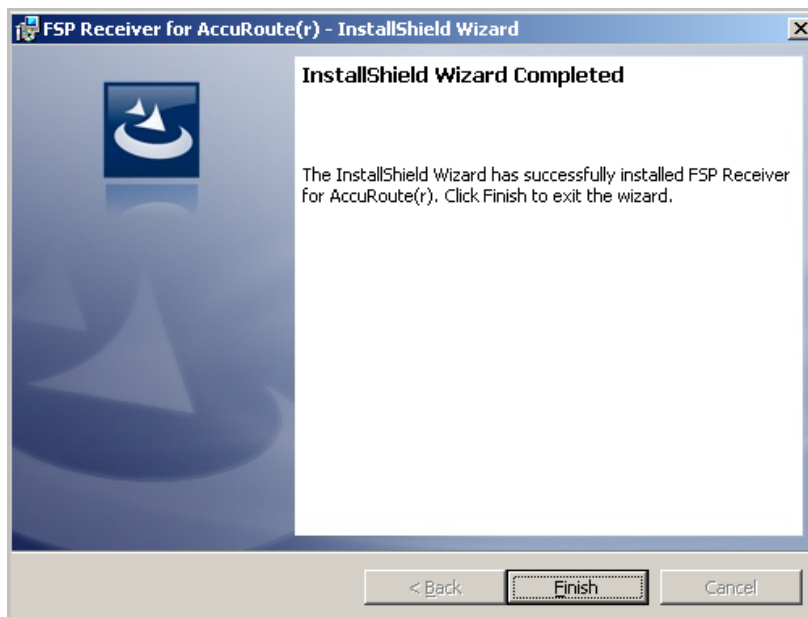
where **{Server_name}** is the name of the AccuRoute Server.

- Click **Next**.

13 The **Ready to Install the Program** page opens.



14 Click **Install** to begin the installation. When installation is complete, you see the **InstallShield Wizard Completed** page.



15 Click **Finish** to close the wizard.

HP OXPd v1.4 and v1.6

Refer to the *Embedded AccuRoute for HP OXPd Device Client 1.6 Installation and Integration Guide* accessed through the [AccuRoute v4.0 documentation](#) page.

Issues and Limitations

Resolved issues

The following issues were found in the Omtool test laboratory during testing and have been resolved in AccuRoute v3.01 Feature Pack 6:

Table 5: Resolved issues

Issue	Description
AR-133	Preview panes now scale the image to the size of the preview window allowing the image to expand with the size of the window.
AR-134	When a set of thumbnails are extracted and deleted, the highlighted thumbnail in focus is wrong.
AR-137	When in extraction if you continue to "tab" past all the options, it ends up focusing on the "preview" screen and then another tab goes off that. This causes Image-In Queue to hang.
AR-142	In some cases when multivalued properties are added to the right-click menu, the Image-In Queue menu options have unexpected results.
AR-143	Nothing is displayed in the Web Client Archive search if any of the properties are drop downs and Image-In Connect is used to view docs.
AR-161	In the extraction screen of IIQ the "Move Down" and "Duplicate" buttons have the same shortcut key combination of Alt-D.
AR-386	Image-In Queue cannot create debug logging without full registry access.
AR-541	Image-In Queue document counter does not accurately reflect the folder count.
AR-605	Approved deficiencies are not moved out of the Omtool Web Client.
AR-663	Deficiency documents display partial pages in the Omtool Web Client.
AR-697	OmQueueWorkflowU.exe is not able to convert PDF documents to .Tif.
AR-716	Problem saving the Elite Voucher form using the OmQueueWorkflowU.exe.
AR-778	Deficiency rejection button is not working.
AR-854	Folder level fields are greyed out and not able to be updated in Image-In Queue.
AR-871	Multiple scans from Copitrak cause Filescan connector to disable.
AR-915	Comments field data is lost when the Approve button is selected. (VIP workflow).
AR-1061	Special characters in the document filename are not retained.
AR-1118	Failed to save Distribution Rule properties errors occur when the Routing Sheet title is over 100 characters.
AR-1184	Errors appear in the messages journal when writing to the Billing table.
AR-1232	AccuRoute Web Client does not update files when the 'upgrade' option is selected during the install.
AR-1247	Delay in displaying the jobs in Image-In Queue.

Table 5: Resolved issues

Issue	Description
AR-1318	Compose failures random errors for template substitution.
AR-1528	Multiple submissions to WorkSite result in unwanted date/time stamps.

Known issues

The following issues are known for AccuRoute v4.0:

Table 6: Known issues

Issue	Description
	Installation settings are needed on the server when installing onto non-US operating systems.
AR-1273	Composed output for PCL is inverted or contains invalid text. When the PCL file is placed in the Filescan folder, the file is composed and when the output is checked the text is inverted for the following delivery formats: Tiff (Image), PDF (Image), DOC (OCR text), DOCX (OCR text), WPD (OCR text), TXT (OCR text), XLS (OCR text), XLSX (OCR text), RTF (OCR text), PDF (OCR text), PDF (OCR text+Image), PDF/A (Image), PDF/A (OCR text), and PDF/A (Image+OCR text).
AR-2735	After updating your system to AccuRoute v4.0, the barcode image does not properly appear in customized routing sheets. You must edit the customized routing sheet to include the variable %OMEDID_BARCODE% inside a text box.
AR-3076	When sending source files with PrImageEnhancement set to 128 and -1, the “white noise” present in the source file is not removed when composing to the PDF format.
AR-3386	A message is moved to the New Items folder in Image-In Queue when prompt values that are not present in database are used for validation.
AR-3584	A new column created in the SharePoint document library is not displayed in the Upload Scan window. This applies to SharePoint 2010.
AR-3595	The calendar time set in the DDT is displayed one hour ahead in an inbound released fax message. For example, if the calendar time in DTT is set as 3.30 PM to 4.30 PM, and a fax message is sent before 3.30 PM, the inbound fax message is held in delivery and are released at 4.30 PM (rather than 3.30 PM).
AR-3596	When using the AccuRoute Extensions for OpenText DM in the Web Client, a document is not added as an attachment when you select the Send to AccuRoute Extensions for DM option. The Web Client is launched without the document selected as an attachment.
AR-3630	Options set in the AccuRoute Web Client are not retained in a distribution created with SharePoint. Rather than generating a standard Routing Sheet with options retained, a simple Routing Sheet is generated.

Limitations

The following limitations are known for AccuRoute v4.0:

Table 7: Limitations

Limitation	Description
RESCANCREATE entry in the SQL Action Log	(AR-2780) An entry for RESCANCREATE is made in the SQL Action Log when a print of the rescan sheet is done from the Find Deficiencies page. However, a RESCANCREATE entry is not made when a Rescan-type deficiency is created.
Object Archive Administrator Optical Manager (OM) service	(AR-3107) Optical Manager requires a specific type of optical media. It must be write-once (WO) and not a rewritable media. If a rewritable media is used, a shelf that has this media inserted in it may show a description of FOREIGN.
"Failed to Retrieve Configuration"	(AR-3623) This message is displayed on the device when enumeration is set to 500 for the Personal Distribution button when using HP OXPd v1.4.

Limitations