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# AccuRoute<sup>®</sup> Extensions for OpenText DM Installation Guide

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# Section I: Overview

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## Features

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 Desktop or 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 an OpenText DM placeholder. When a Personal Distribution is selected from the device, the document scans to that placeholder.
- **Open in End User Interface** - Submit an electronic document directly from the OpenText DM client to the server.

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## Requirements

### AccuRoute server

The system where you install AccuRoute Extensions for OpenText DM must be running:

- AccuRoute Server v4.0

### OpenText DM

AccuRoute Extensions for OpenText DM can be installed with any of the following supported OpenText DM environments:

- OpenText DM v5.3



## Section 2: Installation

Installation involves two procedures, as described in this section:

[Installing AccuRoute Extensions for OpenText DM client](#) (2-1)

[Entering a license for AccuRoute Extensions for OpenText DM](#) (2-2)

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### Installing AccuRoute Extensions for OpenText DM client

- 1 Log in to the system using an account that belongs to the Administrators group.
- 2 Navigate to the AccuRoute server system and find the following directory:  
`C:\Program Files (x86)\Omtool\Omtool Server\Clients\Extension for DM`
- 3 Run `Setup.exe`. The setup configures your system and opens the **InstallShield** wizard showing the **Welcome** message.
- 4 Click **Next**.
- 5 If the AccuRoute Desktop Client is installed (if it is not installed, skip this step), the setup will prompt you to indicate where you want AccuRoute Extensions for OpenText DM to send documents:
  - ▶ **Upload to Web Client**
  - ▶ **Launch AccuRoute Desktop**Click **Next**. The **Destination Folder** page opens. Optionally, change the folder location.
- 6 If the AccuRoute Desktop Client is not installed, the **Web Client URL** page is displayed. Enter the URL.
- 7 Click **Next**. The **Ready to Install the Program** page opens.
- 8 Click **Install** to begin the installation. When installation is complete, you will see the **Installation Completed** message.
- 9 Click **Finish** to close the **InstallShield** wizard.

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# Entering a license for AccuRoute Extensions for OpenText DM

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**Note** AccuRoute Client Option Packs require a license. For more information, contact Omtool Sales.

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You can activate the AccuRoute Extensions for OpenText DM license in one of two ways:

- Automatically when you enter an activation code and the Omtool server is on a system that has access to the internet.
- Manually if the Omtool 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.

## Automatic license activation

Be sure the Omtool server has access to the internet. Have available a copy of the activation code.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server Administrator** to start the AccuRoute Server Administrator.
- 2 Expand the tree view and select the server name.
- 3 Right-click and select the **Licensing** option. The **Licensing** page is displayed.
- 4 Click the **Activate License...** button. The **License Activation** page is displayed.
- 5 Select the **Automatically activate via the Internet** option.
- 6 Enter your license activation code in the **Activation Code** text field.
- 7 Click **OK**. The server is updated with your license.
- 8 Click **Close** to complete the procedure.

## Manual license activation

Have available a copy of the activation code.

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**Note** Although the Omtool server may not have access to the internet, to complete this procedure you will need a system that does have access.

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- 1 Click **Start > All Programs > Omtool > AccuRoute Server Administrator** to start the AccuRoute Server Administrator.
- 2 Expand the tree view and select the server name.
- 3 Right-click and select the **Licensing** option. The **Licensing** page is displayed.



- 4 Click the **Activate License...** button. The **License Activation** page is displayed.
- 5 Select the **Export activation file for manual activation** option.
- 6 Create an Export license file:
  - a Browse to a location where you want to save the license file. By default, the file is an Export file named `ManualActivation.exp`. After specifying the file name and location, click **Save**.
  - b The path will appear in the **Export Filename** field on the **License Activation** page. Click **OK**.
- 7 From a system with internet access, launch the web browser and go to:  
<https://license.omtool.com/accuroute>  
The **Manual Licensing Portal** page opens.

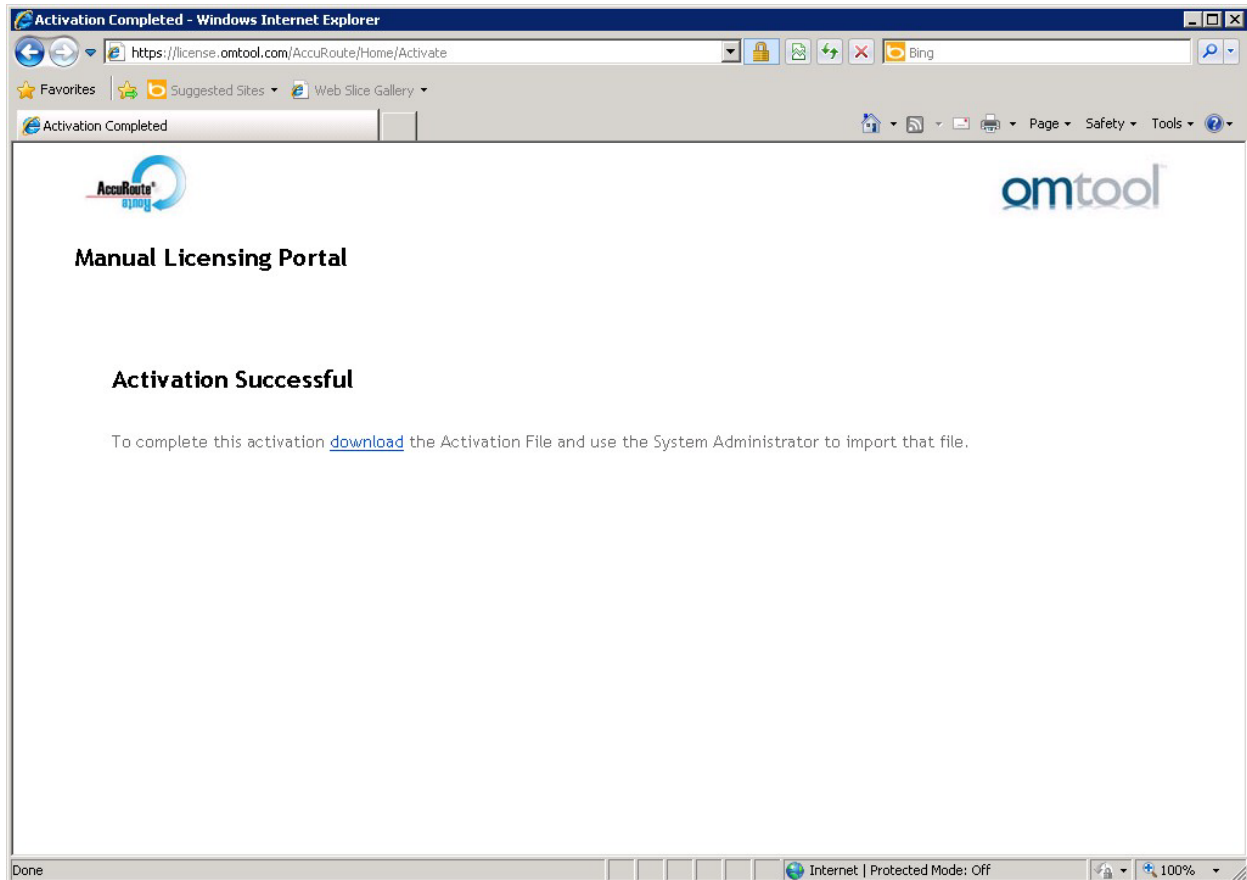


## Manual Licensing Portal

Enter your activation code and select the Exported Activation File made using the Server Administrator.	
Activation Code:	<input type="text"/>
	<input checked="" type="radio"/> Activate License <input type="radio"/> Deactivate License
Exported Activation File:	<input type="text"/> <input type="button" value="Browse..."/>
<input type="button" value="NEXT &gt;"/>	

- 8 Enter your license activation code in the **Activation Code** text field.
- 9 Be sure the **Activate License** option is selected (the default).
- 10 Click the **Browse** button to select the `ManualActivation.exp` file created in Step 6. With the file name selected (highlighted), click **Open**.
- 11 Verify that the license information is entered correctly on the **Manual Licensing Portal** page.

12 Click **NEXT** and the **Activation Successful** message is displayed.



13 To complete the activation, click **Download**. The **File Download** page is displayed.

14 Click **Save** to create the Import file. By default, the file is named with the activation code. You can change this (for example, [ManualActivation.imp](#)) and select a location for the file on the Omttool server.

15 Click **Save**. The **Download Complete** page shows that status of the file download.

16 Click **Close**.

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**Note** You can minimize or close the browser.

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17 On the **Licensing** page, click the **Activate License...** button.

18 Select the **Import activation file from manual activation** option.

19 Browse to the saved [ManualActivation.imp](#) file. Select the file and click **Open**.

20 Click **OK** on the **License Activation** page. The license is updated.

21 Click **Close** to complete the procedure.

# Section 3: Configuration

This section includes a procedure for configuring the AccuRoute connector for OpenText DM.

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## Configuring the AccuRoute connector for OpenText DM

This required configuration is done from the AccuRoute server. All documents that are processed by the AccuRoute server are sent to OpenText via the AccuRoute connector for OpenText.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server Administrator**.
- 2 Right-click on **Connectors** and select **New AccuRoute Server connector for > DM**. The **Server Address** page opens.
- 3 Select the Server Address option:
  - ▶ **Run on the Message Server**
  - ▶ **Remote Server** and enter the server address in the text box.
- 4 Click **Next**. The **Display Name** page opens.
- 5 In the **Name** text box, enter a friendly name for the connector.
- 6 Click **Next**. An installation summary is displayed.
- 7 Click **Finish**. The **DMS Configuration** page opens.
- 8 Enter configuration options:
  - ▶ **Prompt for DM login or use Windows Authentication**
  - ▶ **Always use these DM credentials** - Enter the network name (optional), user name, and password.
- 9 Click **Next**. Then, select a library option:
  - ▶ **Use default library**
  - ▶ **Use this library** and select a library from the drop-down.
  - ▶ **Prompt for library**
- 10 Click **Finish** to complete the configuration.

