Image-In Connect Installation Guide

For AccuRoute v4.1

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Section 1: Overview

The Image-In Connect Installation Guide contains instructions on installing and configuring the Image-In Connect application. It is written for System Administrators with detailed knowledge of the AccuRoute Server and Clients.

This section includes:

Introduction to Image-In Connect (1-1)

How Image-In Connect works (1-1)

Description of the Image-In Connect features (1-2)

Deployment summary (1-3)

Related AccuRoute 4.1 documentation (1-3)

Introduction to Image-In Connect

Image-In-Connect is an extensive and powerful application that allows AccuRoute to integrate with various external applications without any custom programming. It uses a powerful metadata gathering technique to collect metadata from the external application it integrates with. This captured metadata can be used, for example, to generate Embedded Directives and Routing Sheets. Using an Embedded Directive or a Routing Sheet, an user can route documents to repositories like MicroSoft® SharePoint® or ObjectArchive™ where the captured document is stored using the metadata values as indices.

The Image-In Connect Client is a separate licensed product that must be purchased before it can be installed or used. For more information on how Image-In Connect works and for custom integrations of AccuRoute with external applications, contact Omtool Sales.

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 like employee name, date of birth, email 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 Omtool Server Administrator to associate controls on a Windows Application UI in order for the metadata to be captured.

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Thereafter, whenever an user brings up the application, the user is presented an AccuRoute 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 can see, will depend on his configuration).

- Create Routing Sheet
- Create Scan Reservation
- View Linked Documents
- Open in AccuRoute Desktop
- Upload Documents
- Link to Queue

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 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 of 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 however, 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, an Embedded Directive is automatically generated using the current contents of the fields that are mapped for collecting metadata. Once you save this, the Embedded Directive can be made available on a multi-function device 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 a multi-function device 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 Embedded Directive 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 the 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.

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When the user selects the "Open in AccuRoute Desktop" option in Image-In™ Connect, an Embedded Directive is created using the current contents of the fields that are mapped for metadata collection. The AccuRoute® Desktop Client application opens where the newly created Embedded Directive is listed. The user can of save the Embedded Directive as is, or the user can modify the directive as needed before saving it.

The Embedded Directive can be accessed from the AccuRoute Desktop Client, the AccuRoute Web Client and also from multi function devices (MFPs). It is usually listed at the top of directives list available for use.

- ❒ **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 IIQ**

  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 Omtool 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.

Deployment summary

To deploy Image-In Connect:

1. Verify that AccuRoute Server and the Image-In Connect Client requirements have been met. (Go to Section 2: Requirements.)
2. Install Image-In Connect. (Go to Section 3: Installation.)
3. Configure required configurations on the AccuRoute Server. (Go to Section 4: Required AccuRoute Server Configurations.)
4. Configure additional configuration that may be required for Image-In Connect deployment. (Go to Section 5: Optional Configurations.)

Related AccuRoute 4.1 documentation

For more information about AccuRoute Desktop and other AccuRoute products, refer to the AccuRoute v4.1 documentation home page to access:

- Readmes and release notes
- DMS Libraries quick start guides
- User guides and online help

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- Administrator guides
- Installation and upgrade guides

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Section 2: Requirements

This section includes:

AccuRoute Server requirements (2-1)

Client hardware and software requirements (2-1)

AccuRoute Server requirements

The system where you will install the AccuRoute Server must meet the following minimum requirement:

- ❒ AccuRoute v4.1

Client hardware and software requirements

The systems where you will install Image-In Connect application must meet the following minimum requirements:

- ❒ Pentium®-class processor
- ❒ Windows 8, Microsoft Windows 2008, MS Windows 2003 SP2, or MS Windows Vista
- ❒ 20 MB hard disk space
- ❒ 64 MB RAM (128 recommended)

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Section 3: Installation

This section includes:

Accessing the setup files (3-1)

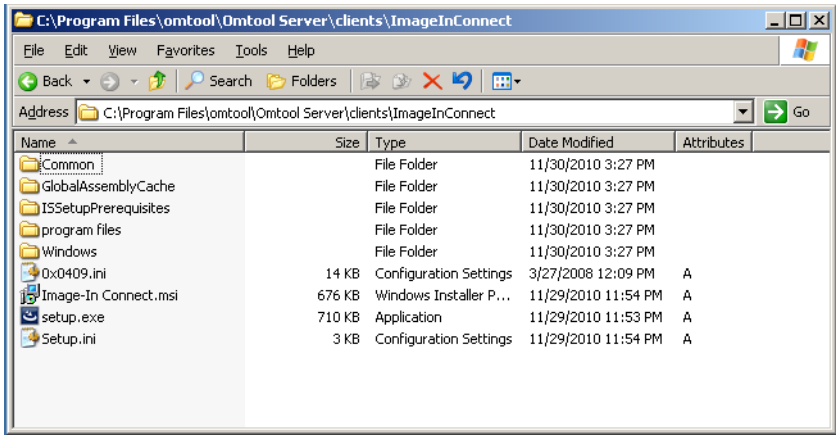
Installing Image-In Connect (3-1)

Running the Image-In Connect setup in silent mode (3-3)

Uninstalling Image-In Connect (3-4)

Accessing the setup files

The Image-In Connect setup files are located in the `C:\Program Files\omtool\Omtool Server\clients\ImageInConnect` directory of the system running the AccuRoute Server. If you are installing Image-In Connect on the same system, simply navigate to this folder to access the setup files.



If you are installing Image-In Connect on a different system, ensure that proper access permissions have been set up for you to access the `C:\Program Files\omtool\Omtool Server\clients\ImageInConnect` directory. You can also copy the setup files to a shared network directory.

Installing Image-In Connect

To install Image-In Connect:

1. Log in to the system where you are installing Image-In Connect using the Omtool Service Account credentials.

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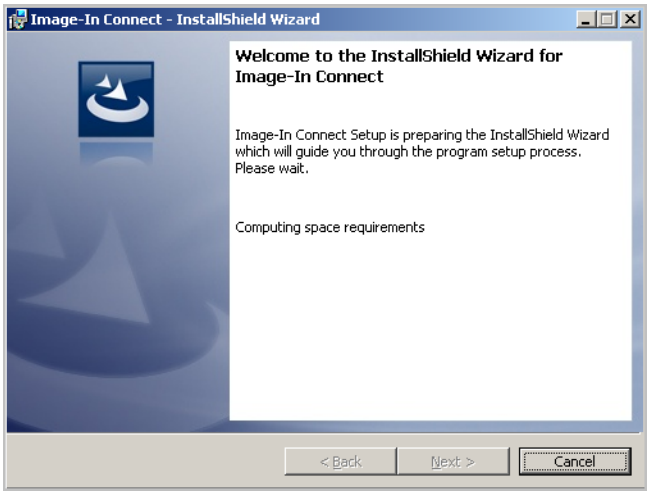
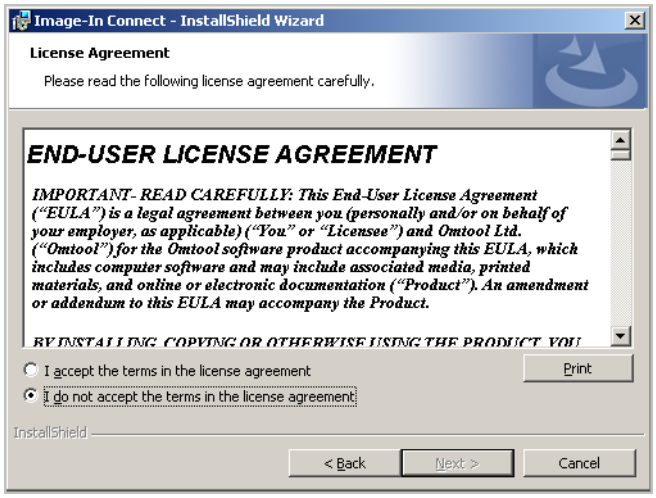
2 Navigate to the directory containing the setup files: `\Program Files\omtool\Omtool Server\clients\ImageInConnect`.

3 Run `setup.exe`. The InstallShield Wizard configures your system and shows the **Welcome** message.



4 Click **Next**. The setup shows the **License Agreement** page.



5 Read the license agreement and if you agree, select the **I accept the terms in the license agreement** option.

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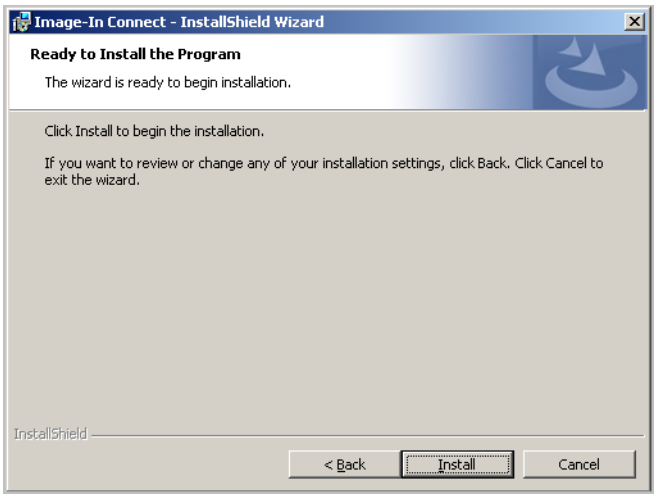
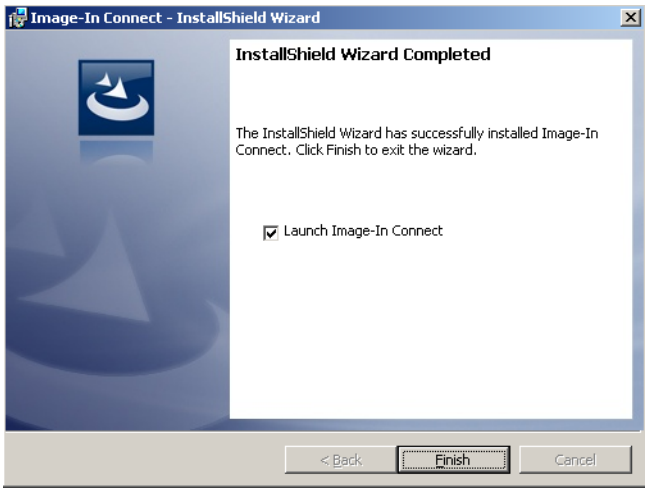
6 Click **Next**. The setup shows the **Ready to Install the Program** page.



7 Click **Next** to begin the installation. When installation is complete, the setup shows the Installation Complete page.



8 Clear the **Launch Image-In Connect** option if you do not want to open the application.

9 Click **Finish** to close the InstallShield Wizard.

Running the Image-In Connect setup in silent mode

To run the Image-In Connect setup in silent mode:

1 Log in to the system where you are installing Image-In Connect using the Omtool Service Account credentials.

2 Open a command prompt.

3 Change the current directory to the one containing the setup files. The default location is `C:\Program Files\omtool\Omtool Server\clients\ImageInConnect`.

4 Run: `setup.exe /s /v"/qn"`

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This installs Image-In Connect to the default location:
`C:\Program Files\Omtool\Image-In Connect`.

5 Optionally, to change the location, set the property `INSTALLDIR`, run
`setup.exe /s /v"/qn INSTALLDIR=<short name path>"`
where `<short name path>` is the short name path to the target folder. (The entire path must be in short name format.

Tip The command for short name conversions is `dir /x`. Run this command in any directory to return the short names of all folders in that directory. For example, to do a short name conversion on J:\Program Files, change the current directory to J:\ and run `dir /x`.

6 Verify that Image-In Connect is installed on the client by

a navigating to `...\Omtool\\Image-In Connect` directory on the client system.

b verifying that the Image-In Connect program files are installed.

Uninstalling Image-In Connect

To uninstall Image-In Connect:

1 Go to the **Control Panel** and start **Add or Remove Programs**.

2 Select **Image-In Connect** and click **Remove**.

You are prompted to confirm that you want to uninstall the software.

3 Click **Yes**.

The Image-In Connect application is uninstalled from your system. A progress indicator shows the status of the uninstallation.

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Section 4: Required AccuRoute Server Configurations

This section contains instructions on how to configure the AccuRoute Server for Image-In Connect.

Configuring Groups for Image-In Connect (4-1)

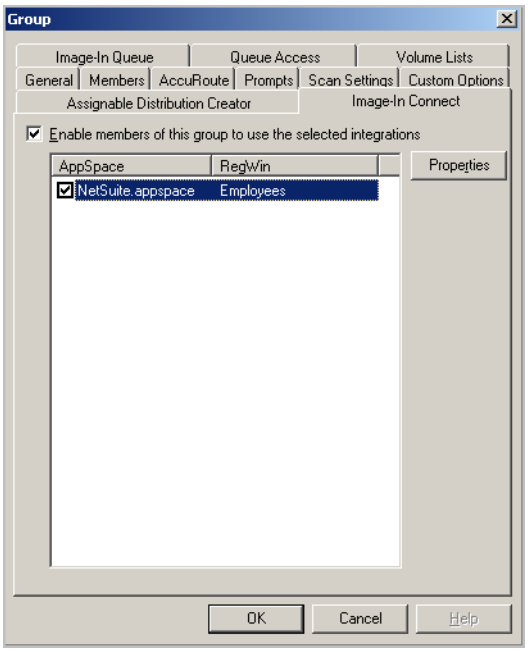
Configuring the Image-In Connect node (4-4)

Configuring Groups for Image-In Connect

After you have install Image-In Connect, you must specify the Groups that can use Image-In Connect.

To configure Group permissions for Image-In Connect:

1. In the Omtool Server Administrator console, expand **Configuration** and go to the **Groups** node.
2. Double click the **Group** you should configure for Image-In Connect. The **Properties** page opens.
3. Open the **Image-In Connect** tab.
4. Select the **Enable members of this group to use the selected integrations** option.
5. Select the **AppSpaces** the Group members can use.



6. For each Appspace selected, click **Properties** to open the Properties page and configure as needed.

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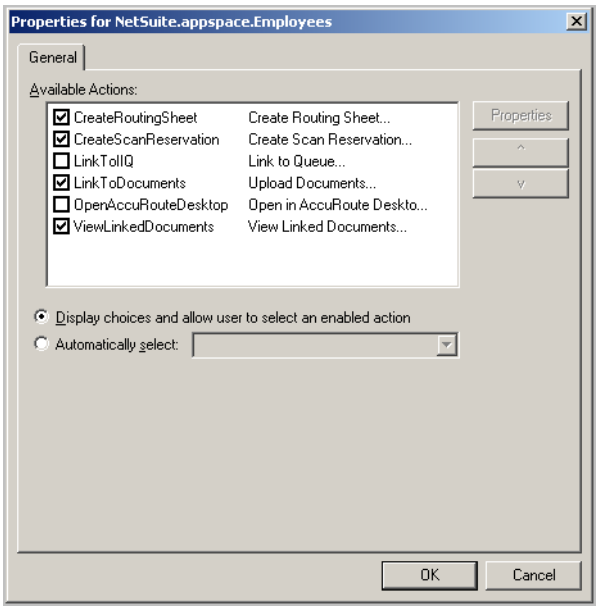
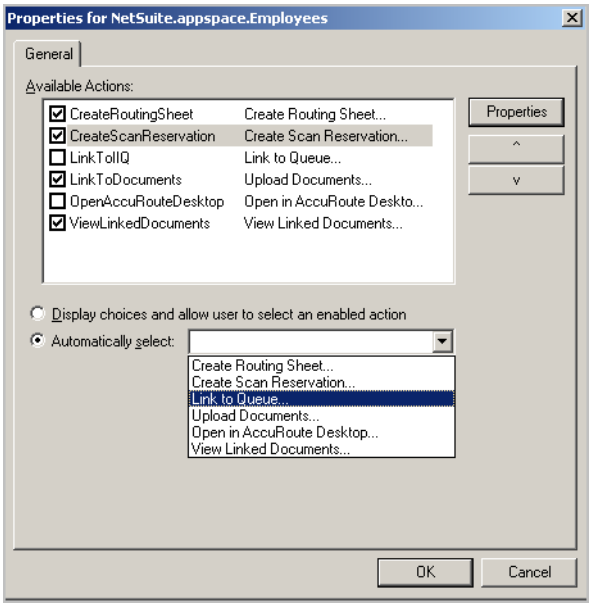
7 Select or clear the Image-In Connect options for the users as needed.



8 If you want the user to use only one of the Image-In Connect feature by default, select the Automatically select option and select the option for the user.



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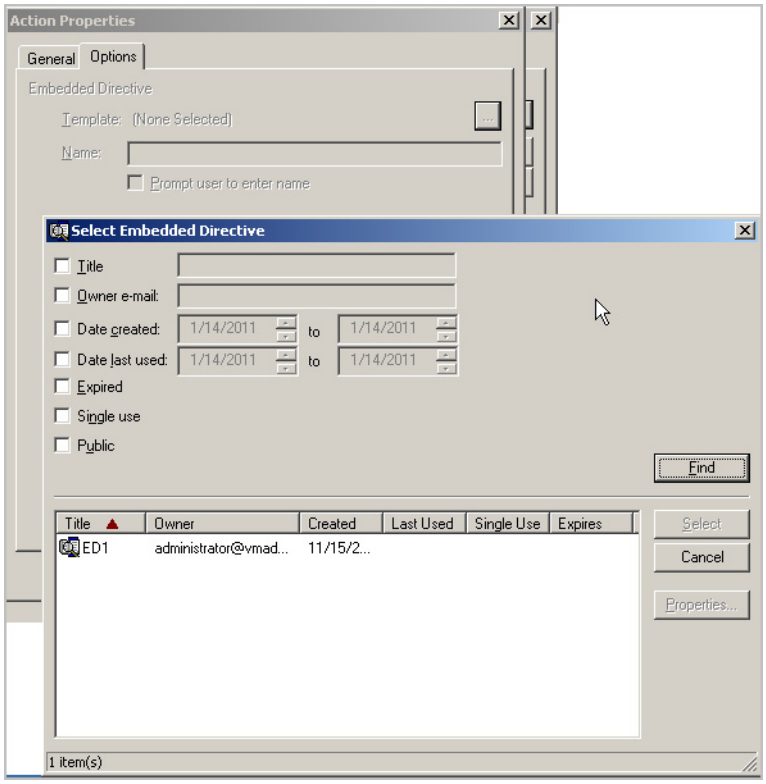
9 For each of the following features - Create a Routing Sheet feature, Create Scan Reservation, Open in AccuRoute Desktop and Upload Documents, and specify the template Embedded Directive optionally, enable prompt using the instructions below:

a Click **Properties** and in the **Action Properties** page that opens, go to the **Options** tab.

b Click on the **Browse** button beside the **and** field and select from available Embedded Directives on the server to serve as a template.



c Optionally, in the **Name** text box, provide a descriptive name for the Embedded Directive. You can also ask the user to provide a name by checking the Prompt the user to enter name option.

d To enable use of Prompts, select the **Prompt user to enter name** option.

e Click **OK** to save your changes.

10 If you are configuring use of the Link to Queue feature, specify the Application Code using the following instructions.

a In the **Properties** page, select **LinkToIIQ** and then click **Properties** in that page. The **Action Properties** page opens.

b Open the **Actions** tab.

c In the **Application Code** text box, enter **IIC**.

d Click **OK** to save your changes.

11 Close all the other open dialogs to complete Group configuration.

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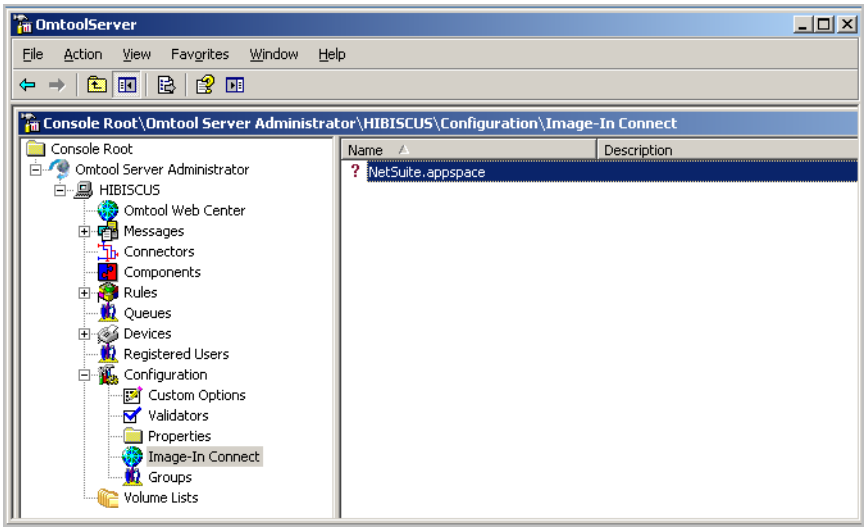
Configuring the Image-In Connect node

After the Omtool Server Administrator has set permissions for the Active Directory groups, the Administrator must configure the Image-In Connect node.

To go to the Image-In Connect node:

1. Open the Omtool Server Administrator console.
2. Expand the **Configuration** node and find the **Image-In Connect** node.



The Image-In Connect node lists all Appspaces defined for the AccuRoute environment. For each Appspace, the Administrator will define the Xmodel elements.

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

The Appspace and the associated Xmodel definitions will depend on the external application AccuRoute is integrating with.

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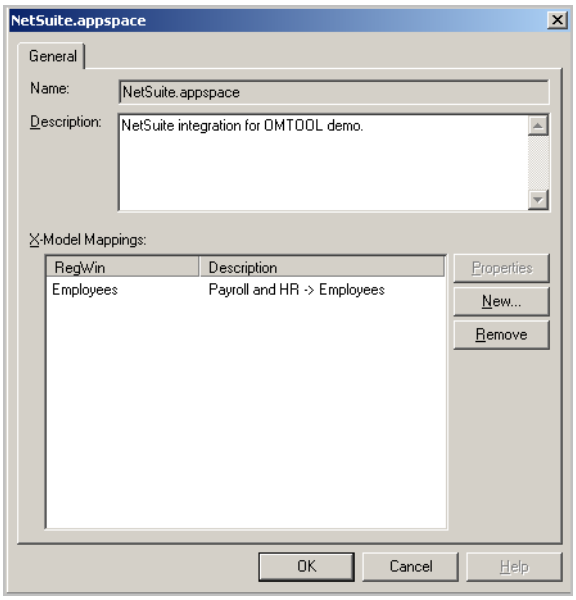
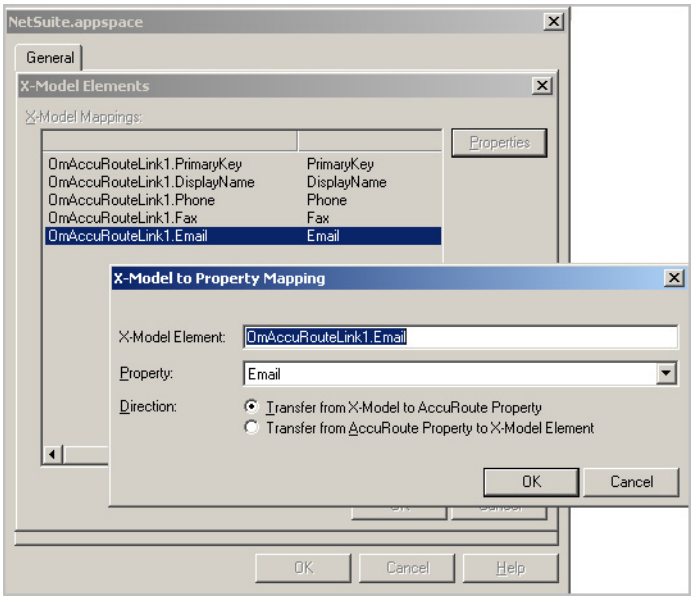
The following example shows an Appspace that has been defined for integration with a Human Resource application processing employee demographic information.



To collect employee demographic information like primary identification number, employee display name, email, phone and or fax number, the Omtool Server Administrator will define Xmodel elements for each individual information piece as shown below.



Since the Omtool action will populate properties from only one X-Model, when mapping properties to X-Model elements, it is important to create all the elements in one X-Model.

For example, the MyCRM.Appspace that is included with the install and is located in the Samples directory has several X-Models in each Regwin. This means that not all the fields are accessible through the Omtool action.

To learn more about Appspaces and Image-In Connect, contact Omtool Sales.

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Section 5: Optional Configurations

This section includes:

Configuring Queue Workflow rule for Link to Queue feature (5-1)

Configuring Queue Workflow rule for Link to Queue feature

The Link to Queue feature of Image-In Connect requires a Queue workflow rule for the External Applications folder for Image-In Queue is setup. Without this rule, jobs will not get routed to the External Applications folder, nor will it be listed in the Omtool Workflow Integration Application page (this is the page that opens when an user selects Link to Queue option in Image-In Connect).

To configure the External Application Queue workflow rule:

1. In the Omtool Server Administrator, go to the **Queues** node.
2. Select a Queue to configure. The **Properties** page opens.
3. Open the **Workflow** tab.
4. Click **Add** to open the **Queue Workflow Rules Properties** page.
5. In the **Description** text box, enter the name for the workflow, for example, ExternalApp.
6. In the **Criteria** section, click **Add**. The **Add Workflow Criteria** page opens.
7. Select **Property Dictionary Item** and click **Next**.
8. Select the property from the drop down list. Next select the **is valid** option and click **Finish**.
9. In the **Action** section, click **Configure**. The **Configure Action Workflow** page opens.
10. Select **External Application** and click **Next**.
11. In the **Application Code** text box, enter **IIC** and click **Finish**.
12. Click **OK** to close the **Queue Workflow Rules Properties** page.

Queue workflow configuration is complete.

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