
AccuRoute[®] v5.0

Release Notes

December 2015



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>

© 2015 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

Contents

Section 1: Summary of Features

New Features.....	1-1
Related AccuRoute v5.0 documentation.....	1-3

Section 2: AccuRoute Server Updates

Operating System support.....	2-5
Upgrading.....	2-5
Installation.....	2-6
Streamlined installation and configuration process.....	2-6
Healthcare Suite Custom Installation option.....	2-6
Licensing.....	2-7
Find option of Licensing In Use tab now filters results.....	2-7
Connectors.....	2-7
New DMS Connector for HP Records Manager.....	2-7
Universal Output Connector (previously the XML Output Connector).....	2-8
New AccuRoute CX Module for Document Classification, Extraction and Routing.....	2-9
New Caller ID option for the Telco Connector.....	2-10
Load-sharing for Printer and DMS Connectors.....	2-12
HP Lan Fax Connector supports LDAP Sender Lookup.....	2-13
Components.....	2-15
New Billing Component mapping option.....	2-15
Devices Node.....	2-16
New attribute mapping files.....	2-17
New Managing Devices screen.....	2-17
New Device Information and Job Queue buttons.....	2-23
New Confirmations tab for device buttons.....	2-23
Simplified property transformations.....	2-27
Updated issue reporting.....	2-28
Configuration Node.....	2-29
New look for Job Properties.....	2-29
New Network Folder destination types.....	2-30
Viewing User Permissions.....	2-30
Deprecated items.....	2-31

Section 3: Omtool Client Updates

Client versions in this release	3-33
Operating System support	3-34
Requirements	3-34
Mobile Client	3-35
Requirements	3-35
Localization	3-35
Desktop Client	3-36
Hiding the Desktop Watch Folder icon	3-36
Web Client	3-37
Requirements	3-37
Support	3-37
New Folder recipient types	3-37
Mobile Reservations	3-38
Devices	3-39
Requirements	3-39
New Device Support	3-39
New Confirmations option for device buttons	3-40
New buttons for the Embedded Device Client	3-40
New Image-In Direct Capture Client	3-41

Section 4: Issues and Limitations

Resolved issues	4-43
Known issues	4-43
Limitations	4-44

Summary of Features

New Features

The following tables summarize the new Server and Client features specific to AccuRoute® v5.0:

Table 1: AccuRoute v5.0 Server New Features

Components Affected	Node	New Feature	Description
AccuRoute Server		Streamlined installation and configuration process	A streamlined installation process checks for and prepares installation prerequisites and also provides post-installation server configuration.
		Healthcare Suite Custom Installation option	The new Omtool Healthcare Suite can be installed using the custom installation option.
		Find option of Licensing In Use tab now filters results	On the Licensing In Use tab, administrators can now filter the Find results to specific users or devices currently licensed on the server.
	Connectors	New DMS Connector for HP Records Manager	Support for the HP Records Manager (DMS Connector)
		Universal Output Connector (previously the XML Output Connector)	The updated Universal Output Connector (previously the XML Output Connector) is more flexible in meeting customer requirements for its use.
		New AccuRoute CX Module for Document Classification, Extraction and Routing	An expansion of AccuRoute's ability to work with Forms offers enhanced OCR recognition for document classification and data extraction from structured, semi-structured, and unstructured documents (forms).
		New Caller ID option for the Telco Connector	The Telco Connector now supports using a Calling Party Number (Caller ID) when transmitting a fax.
		Load-sharing for Printer and DMS Connectors	Administrators can configure connectors to use multiple servers for load-sharing.
		HP Lan Fax Connector supports LDAP Sender Lookup	Administrators can configure the HP Lan Fax Connector to check for user data via LDAP and apply the metadata found to messages.
	Components	New Billing Component mapping option	Administrators can now map property values to specific Column Names in the Billing Component.
Devices	New attribute mapping files	This release provides attribute mapping options for system environments using a mail server other than Exchange.	

Table 2: AccuRoute v5.0 Server New Features (continued)

Components Affected	Node	New Feature	Description
AccuRoute Server	Devices	New Managing Devices screen	This release allows administrators to globally manage and configure multiple devices in the environment, including the ability to import and export multi-device configuration files.
		New Device Information and Job Queue buttons	The Device Information button offers MFP-specific information (name, model, address, etc) and the Job Queue button reports jobs recently submitted to the AccuRoute server from a specific MFP or by a specific user.
		New Confirmations tab for device buttons	On the new Confirmations tab in Button Properties, administrators can allow authenticated and unauthenticated users to set confirmations and define the type of confirmations available to them.
		Simplified property transformations	The process of making property transformations is simplified in this release.
		Updated issue reporting	The Server Administrator now provides more meaningful reports when device installations fail.
	Configuration	New look for Job Properties	The Job Properties Node (previously the Properties Node) now organizes properties by two folders: System and User. Administrators can modify or create new User properties. System properties cannot be edited.
		Multiple values for properties	Administrators can create Properties that allow multiple values. Such properties can be configured to use default values, free text fields, or drop-down menu choices.
		New Network Folder destination types	System Administrators can now configure Network Folder access for authorized user groups to the following cloud-based storage applications: <ul style="list-style-type: none"> • HP Flow CM • Microsoft® OneDrive™ (Personal) • Google Drive™ • box
		Viewing User Permissions	Administrators can now use View User Permissions to verify all groups for which a given user is enabled, as well as the permissions associated with each group to which the user has access.

Table 3: AccuRoute v5.0 Clients Features

Components Affected	New Features	Description
Mobile Client	Localization	The Mobile Client is now localized for the following languages: <ul style="list-style-type: none"> • Simplified Chinese • French • German • Italian • Brazilian Portuguese • Spanish
Desktop Client	Hiding the Desktop Watch Folder icon	Users can now hide the AccuRoute Desktop Watch Folder icon in the task tray.
Web Client	Support	The AccuRoute Web Client is now: <ul style="list-style-type: none"> • qualified with Microsoft Windows 8 x32 and Windows 8 x64. • supported on the Google Chrome™ internet browser.
	New Folder recipient types	Cloud-based storage for authorized user groups now includes access to HP Flow CM, Microsoft OneDrive (Personal), Google Drive, and box.
	Mobile Reservations	Web Client users can create new Mobile Reservations, and view or cancel existing Mobile Reservations.
Device Client	New Device Support	The AccuRoute Embedded Device Client includes support for the following devices: <ul style="list-style-type: none"> • HP Color MFP S962dn • HP Color MFP S970dn • HP Color MFP S951dn • HP MFP S956dn • HP Officejet Color MFP x585 • HP Flow MFP M680 • HP Flow MFP M630
	New Confirmations option for device buttons	Authenticated and unauthenticated users can request confirmation (notification that a document was not printed or emailed as requested) upon failure of a button action.
	New buttons for the Embedded Device Client	<ul style="list-style-type: none"> • Job Queue button • Device Information button
Image-In Direct Capture Client	New Image-In Direct Capture Client	Administrators can use the Custom installation to install the new Healthcare components.

Related AccuRoute v5.0 documentation

For more information about AccuRoute v5.0 and other AccuRoute products, refer to the [AccuRoute v5.0 documentation home page](#) to access:

- Readmes and release notes

Related AccuRoute v5.0 documentation

- [DMS Libraries quick start guides](#)
- [User guides and online help](#)
- [Administrator guides](#)
- [Installation and upgrade guides](#)

AccuRoute Server Updates

This section describes the new AccuRoute Server features for AccuRoute v5.0.

For more information on using or configuring the new features, refer to the [AccuRoute Server Administrator Help](#) and the [AccuRoute Web Client Online Help](#).

This section includes:

[Operating System support](#) (5)

[Upgrading](#) (5)

[Installation](#) (6)

[Licensing](#) (7)

[Connectors](#) (7)

[Components](#) (15)

[Devices Node](#) (16)

[Configuration Node](#) (29)

[Deprecated items](#) (31)

Operating System support

The AccuRoute v5.0 server supports

- Microsoft Windows 2012 x64
- Microsoft Windows 2012 R2 x64
- Microsoft Windows 2008 R2 SP-1 x64

Upgrading

AccuRoute v5.0 supports upgrading from AccuRoute v4.1 environments. The following versions are qualified to upgrade to AccuRoute v5.0:

- AccuRoute v4.1
- AccuRoute v4.1 Feature Pack 1

For instructions on how to upgrade from a legacy AccuRoute environment, consult the [AccuRoute Server and Clients Upgrade Guide](#).

Installation

The AccuRoute v5.0 installation process is now streamlined and offers a new custom option:

- [Streamlined installation and configuration process](#) (6)
- [Healthcare Suite Custom Installation option](#) (6)

Streamlined installation and configuration process

The AccuRoute v5.0 installation and configuration process now automates a series of previously-manual tasks.

A new pre-installation pack includes options for configuring a standard AccuRoute server, Web Client, Remote Components, and Remote Modem servers. This pre-installation package automatically verifies, installs, and/or configures a variety of prerequisites, including:

- Minimum versions of the OS, Internet Explorer, .NET, and Microsoft SQL
- SMTP and IIS services
- 32-bit IIS applications
- DCOM and IIS configuration
- installation of required runtime libraries
- application of Windows firewall settings
- Print spooler service set to automatic
- User Access Control (UAC) set to required setting

Post-installation configuration requirements are now automated as well. Post-installation configurations for the server include:

- Setting the Doc, Docx, XLS, XLSX, PPT, PPTX, HTM and HTML formats to use the Aspose compose engine
- Setting a Cleanup task in Maintenance for 30 days

Note It is recommended to run this program on all servers that will run AccuRoute or remote AccuRoute components.

To install AccuRoute v5.0, refer to the [AccuRoute v5.0 Server Installation Guide](#).

Healthcare Suite Custom Installation option

With the AccuRoute Server v5.0 installation, you can also install the **Omtool Healthcare Suite for AccuRoute**, using the custom installation process. The Healthcare Suite components include:

- Image-In Direct Capture Client
- Image-In Direct Capture Configuration Directory

- Healthcare Server Runtime Component (including the Print Stream Capture Service)
- Healthcare Database with the Healthcare CLR Extension

To install the Healthcare Suite, Server Administrators can select the **Custom Installation** option. For more information about the Omtool Healthcare Suite, contact [Omtool Customer Service](#).

Licensing

Find option of Licensing In Use tab now filters results

AccuRoute Server v5.0 adds the option to filter the **Find** results on the **In Use** tab in **Licensing**. Administrators can limit the list of the **Find** results to specific users or devices that are currently licensed on the server.

This feature simplifies the ability to find a specific user or device. You can search for users by name and for devices by serial number.

Connectors

The **Connectors Node** has been updated with the following features:

- [New DMS Connector for HP Records Manager](#) (7)
- [Universal Output Connector \(previously the XML Output Connector\)](#) (8)
- [New AccuRoute CX Module for Document Classification, Extraction and Routing](#) (9)
- [New Caller ID option for the Telco Connector](#) (10)
- [Load-sharing for Printer and DMS Connectors](#) (12)
- [HP Lan Fax Connector supports LDAP Sender Lookup](#) (13)

New DMS Connector for HP Records Manager

AccuRoute v5.0 introduces support for a new **DMS Connector for HP Records Manager**.

The AccuRoute DMS Libraries integration with HP Records Manager provides the ability to profile all of your important documents and store them in Records Manager. Users can route both soft copy and hard copy documents to Records Manager quickly and easily, using Records Manager's familiar, native windows.

To create and configure the HP Records Manager Connector:

- 1 Right-click **Connectors** in the console tree and select **New AccuRoute Server connector for > Records Manager**. The **Server Address** page opens.
- 2 Select the server address to which you want this connector installed. Choose **Run on the Message Server** or **Remote Server**. If you select **Remote Server**, enter the name of the server. Click **Next**. The **Display Name** window appears.

- 3** **Records Manager on the Server** appears as the default name. Type a friendly name for this connector in the **Name** text box and click **Next**. The **Congratulations** window appears.
- 4** Click **Finish**. The **HP Records Manager Configuration** wizard launches and prompts you to configure the connector to support HP Records Manager.

Note Billing is not supported for HP Records Manager, therefore, the billing field names on the connector will be empty. Also, the **Export Profile Information** and **Create Default Profile Information** buttons are not applicable for the HP Records Manager DMS connector at this time.

- 5** In the **Database** section, click **Browse**, and select the dataset where the user should save documents. Click **OK**.
- 6** In the **Record Type** section, click **Browse**, and select a record type from the list provided. Click **OK**.
- 7** Click **Finish**. The HP Records Manager DMS connector is configured and appears in the details pane.
- 8** For messages to be delivered into the HP Records Manager database, you need to create an outbound routing rule.

To create the routing rule for the HP Records Manager Connector:

- 1** Launch the MMC Admin console, expand the **Rules** node, and select **Outbound**.
- 2** Right-click **Outbound** and select **New > Rule**. Choose a criteria upon which to base the routing action.
- 3** Choose **Route to Connector** in the **Add Rule Action** screen and select the **HP Records Manager** from the **Connector** drop-down menu.
- 4** Specify the **Document Delivery Format** to be imported and click **Finish**.

For example, if the Destination is a Fax Number of 123, Route to HP Records Manager connector.

Note In some cases, the HP Records Manager is used as an archive destination, and in this scenario, you can modify an existing rule to include the HP Records Manager as an additional Routing Action, so that after a message is delivered to its primary destination, the second action will be matched and delivered to HP Records Manager.

For more information about the HP Records Manager Connector, see the [AccuRoute Server Administrator Help](#).

Universal Output Connector (previously the XML Output Connector)

The XML Output Connector is now updated and renamed the **Universal Output Connector**. AccuRoute v5.0 updates the **Universal Output Connector** to be more flexible in meeting customer requirements for its use.

If you are upgrading from a prior version, you will need to recreate the connector (using the Universal Output Connector) and modify the routing rules for this new connector.

Note The prior version of the Universal Output connector is neither supported nor updated by this release. You need to manually enable the connector after installation of AccuRoute v5.0.

New AccuRoute CX Module for Document Classification, Extraction and Routing

AccuRoute v5.0 expands the AccuRoute Server's ability to work with forms, offering additional OCR recognition for document classification and data extraction from structured, semi-structured, and unstructured documents, sometimes referred to as "forms." Both electronic and scanned image files are supported with this new module.

This release introduces the **AccuRoute CX Module**, which technically is a new Connector in the language of the AccuRoute platform. The **AccuRoute CX Connector** appears on the Server Administrator under the Connectors Node.

Form Types

The **AccuRoute CX Connector** supports several categories of forms. Data recognition and extraction processing time depends on the type of form being processed by the system. The following form types are supported:

- **Structured Forms** — Structured Forms have a specific and reliable layout and appearance and by definition are "structured." While appearances may slightly vary, an identifying version/date mark usually appears on the form in a dependable location. Examples of this type include a W2 or I9 government form. Structured forms are typically the ones most efficiently processed through AccuRoute CX, as this form type is the simplest type from which to recognize and extract data.
- **Semi-structured Forms** — Semi-structured Forms also contain valuable and field-based data, but may deviate from consistent or standard layout as a structure form. Purchase Orders are an example of a semi-structured form. These are typically labeled with the phrase "Purchase Order." A purchase number, vendor address, issuer address, part numbers, description and amounts are likely included on the form, but the Purchase Order from one vendor may differ in layout and content from that of another vendor.
- **Unstructured Forms** — Unstructured Forms have neither a reliable nor easily recognized layout or "structure." Resumes and power-of-attorney letters are examples of Unstructured Forms. Due to added complexity, the recognition and data extraction processing time for Unstructured Forms may be slower than for the previous types of forms.

Forms Libraries and Property Mapping

Forms Libraries allow you to collect and organize your forms by type, department, or other logical groupings.

Forms Libraries are imported to a single AccuRoute Server or shared between Servers. When a Forms Library is imported to a server, its property metadata is automatically mapped to matching AccuRoute properties. Properties can also be manually mapped between the Forms Libraries.

After processing a document, AccuRoute provides color-coded "confidence" and validity levels per property. You can view the results in Image-In Queue™ (IIQ). The status of each confidence and validity combination is visually represented by a color-coded icon. Refer to the table below to see all the indicator options.

Table 4: Extraction confidence and validity status indicators

OCR Confidence (ABBYY)	Validity (AccuRoute)	Status
True	True	OK (green)
True	False	Suspect (mustard yellow)
False	True	Suspect (mustard yellow)

Table 4: Extraction confidence and validity status indicators

OCR Confidence (ABBYY)	Validity (AccuRoute)	Status
False	False	Requires Review (red)
False	None	Suspect (mustard yellow)
True	None	OK (green)

You can define Outbound rules and IIQ workflow rules to act on a particular confidence level. For example, given a property assessed at low OCR translation confidence, the rule can retain the document in IIQ for further review.

AccuRoute CX can recognize and extract data across an entire document, regardless of the document's structural complexity. Previous versions of AccuRoute offered Text Extraction. Using AccuRoute's Text Data, the system extracts text-based data from specific areas (zones) on a given electronic PDF document.

AccuRoute also offers barcode data extraction. The Barcode Data Extractor and the Text Data Extractor continue to be offered with AccuRoute v5.0 and are licensed separately. Each license enables up to four CPU threads.

Requirements

AccuRoute CX requires a license for the **AccuRoute Workflow Server**. The AccuRoute Workflow Server License enables the following features:

- AccuRoute CX Module
- Image-In Queue Per Workflow
- Image-In Queue User Access License
- One Workflow Volume Extension

Each **AccuRoute CX Module** comes with four processing threads and supports one **Forms Library** for the specific type of document processing to be implemented given a particular workflow. (For details, refer to [Forms Libraries and Property Mapping](#).)

To maximize throughput in document-intensive environments, you can add additional **AccuRoute CX** licenses. This increases the processing thread count for a given Forms Library. Multiple Forms Libraries require multiple **AccuRoute CX** licenses. Support for additional or distinct document workflows (specified as a new Forms Library) requires an additional **AccuRoute CX** license.

Note While the Text Data Extractor and the Barcode Data Extractor are license extensions available on the standard AccuRoute Server, the AccuRoute Workflow Server license is a separate license required to support AccuRoute CX. Please contact sales@omtool.com for more information.

Configuring the CX Connector and CX Module workflow

For instructions to install and configure the **AccuRoute CX Connector** and for more information about the **AccuRoute CX Module** workflow, see the [AccuRoute CX Connector Installation and Configuration Guide](#).

New Caller ID option for the Telco Connector

AccuRoute v5.0 introduces support for using a **Calling Party Number** (Caller ID) when transmitting a fax via the **Telco Connector**.

To configure a Calling Party Number for use on a channel:

- 1 In the Omtool Server Administrator, right-click **Telco on the Server** and select **Properties**. The **Properties for Telco on the Server** screen appears.
- 2 Select the **Send** tab. At the bottom of the screen is the new **Calling Party Number** section.

The screenshot shows the 'Send' tab of the 'Properties for Telco on the Server' dialog. The 'Calling Party Number' section is expanded, showing a 'Format' field with the value '%CPN%'. Below it is a 'mappings...' list with three entries: 'SENDER_BUSINESS_FAXPHONE', '\\prCallingPartyNumber', and 'SENDER_BUSINESS_FAX_NUMBER'. To the right of the list are buttons for 'Properties', 'New...', 'Remove', and up/down arrow keys. The 'OK', 'Cancel', and 'Help' buttons are at the bottom of the dialog.

- 3 Enter the **Format** variable and **mappings** for the system to apply to the Caller ID you want to use in a channel.
- 4 Select the **General** tab and enter the appropriate value in the **Calling Party Number (Caller ID)** text box.

The screenshot shows the 'General' tab of the 'Properties for Telco on the Server' dialog. The 'Called Subscriber Identification (CSI)' field contains 'Channel-1'. The 'Calling Party Number (Caller ID)' field contains '800-555-1212'. The 'Run Mode' section has three radio buttons: 'Normal' (selected), 'Send Only', and 'Receive Only'. The 'OK', 'Cancel', and 'Help' buttons are at the bottom of the dialog.

- 5 Click **OK**.

Load-sharing for Printer and DMS Connectors

AccuRoute v5.0 offers a new load-sharing capability to process information more quickly and remove bottlenecks. This feature supports both Printer and DMS connectors. The **Properties** page for both connector types includes a new **Servers** tab to support this feature.

Administrators can now configure individual Printer connectors to use multiple remote servers, just like DMS connectors already can. Once you have configured a set of servers for the connectors, the system automatically load-balances across all configured servers in a round-robin fashion.

Requirements

- AccuRoute v5.0

Note You may need to acquire additional Printer Connector licenses to add to the AccuRoute server.

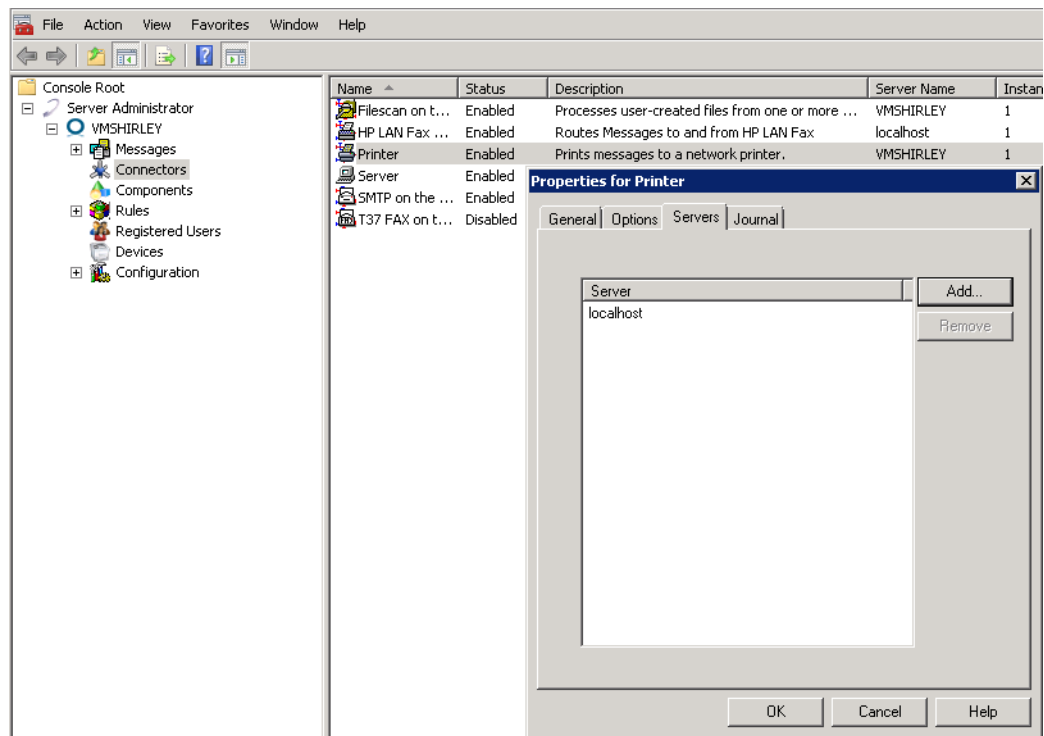
For remote connector installation information, refer to the [AccuRoute v5.0 Server Installation Guide](#).

Configuring multiple servers for a Printer connector

Note The following steps describe the configuration for a Printer Connector. You can use the same steps for DMS Connectors.

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

- 3 Right-click **Printer** and select **Properties**. The **Properties for Printer** page appears.



- 4 In the **Servers** tab, click **Add**. The **Server connector will run on..** pop-up appears.
- 5 Enter the fully-qualified domain name of the remote server that you want to serve as a secondary connection. After the system verifies the connector installation, the server appears in the **Servers** list.
- 6 Click **OK**. Repeat as necessary for additional servers.

Note You can view the record of which server the Printer connector used to process a specific job in the job's **Journal Properties**.

Also note, you can modify your setup to include only a remote server for the connector. To accomplish this, once you have added a remote server, you can remove the local server from the connector, leaving the remote server alone.

HP Lan Fax Connector supports LDAP Sender Lookup

Administrators can now configure a **Sender Lookup** for the **HP Lan Fax Connector** to check for user data with LDAP and attach the meta data found to the relevant messages.

Configuring Sender Lookup for the HP Lan Fax connector

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the **AccuRoute Server Administrator** and select **Connectors**. The details pane lists the connectors that are licensed with your server.

- 3 Double-click the **HP Lan Fax Connector** to open the **Properties for the HP Lan Fax Connector** screen.
- 4 In the **Sender Lookup** tab, click **Add**. The **LDAP Properties** page opens.
- 5 In the **General** section of the **Connection** tab, enter the following information.
 - ▶ In the **Server Address** text box, enter the fully-qualified domain name of the lookup server.
 - ▶ In the **Port** text box, enter the port number. The port number can be **389** (LDAP), **636** (secure LDAP), or **3268** (Active Directory).

Note These port numbers are the standard default values. If necessary, you can enter different port numbers.

- ▶ In the **Description** text box, enter a brief description.
- 6 In the **Logon** section, enter the following information:
 - ▶ Select **User** if you want to log on to the Sender Lookup server as a specific user (the default is Anonymous).
 - ▶ In the **Username** text box, enter the name of the user. In the **Password** text box, enter the password for the user.
 - ▶ If you select **User**, you must look at the **Username** field in Active Directory. If this field contains a user ID formatted using the Active Directory logon format (for example, `username@server.forest.domain.com`), lookups in this search base will be successful with no additional configuration. If this field contains a user ID in any other format (for example, `domain\user`), select **Bind using Windows generic security services**.
 - 7 In the **General** section of the **Search** tab, enter the following information:
 - ▶ In the **Search Timeout** text box, enter the number of minutes the server should search before timing out. The timeout period you define on the lookup server should not be longer than the **Search Timeout** setting for the connector. You must also consider the scope of your search base when configuring the timeout setting. If the search base is broad, configure a longer timeout period, since the lookup might take relatively longer.
 - ▶ In the **Search Base** text box, enter the search base string. Use LDAP format when you type the search base string. For example: `ou=mysite,o=org.com`
 - 8 In the **Search Filter** section, you can define either a **simple** or **custom** filter.
 - ▶ To use a simple filter:
 - ▲ Select **Use simple filter**.
 - ▲ Select **Exact match on Logon Name**.
 - ▲ Check the **Return people only** box if you want the query to return only users associated with this connector. (This option will exclude printers, computers, and other resources from the search results.)

- ▲ At the **Attribute holding Logon** text box, select the attribute that stores the Logon name in your Active Directory. **sAMAccountName** is the attribute used by default in a standard Active Directory. Select one of the following:
 - **sAMAccountName**
 - **cn**
 - **UserPrincipalName**

While you edit the **simple filter** options, the display of the Filter text actively adjusts.

Note Using a **custom filter** is appropriate when the simple filter options are insufficient to create the search filter you need. For example, you might create a custom filter if the Logon Name is not stored in any of the AD attributes listed above. The custom filter option is advanced and requires LDAP query construction expertise.

- ▶ To use a custom filter:
 - ▲ Select **Use custom filter** and click **Properties**. The **Custom LDAP Filter** page opens.
 - ▲ Enter the custom search filter in the **Filter** text box. (Use the guidelines provided on the **Custom LDAP Filter** screen.)
 - ▲ Click **OK**.
- 9 In the **Filter** section, click **Test**. The **Lookup Test** page opens.
- 10 Enter an e-mail address in the **Enter e-mail address** text box and click **Search**. The query results appear below in the **Returned addresses** section.
- 11 Click **Close** to go back to the **LDAP Properties** page.
- 12 Click **OK** twice to close the **SMTP properties** page.

Tip Tip: Omtool recommends that you configure the lookup database to index the field containing DID numbers. This optimizes the speed of lookups.

Components

The **Components Node** has been updated with the following feature:

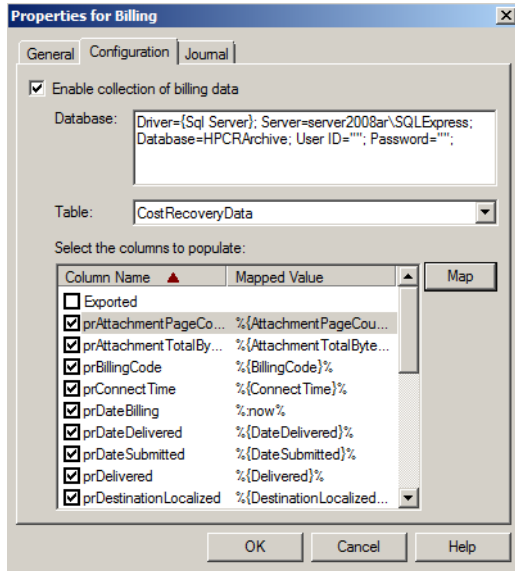
- [New Billing Component mapping option](#) (15)

New Billing Component mapping option

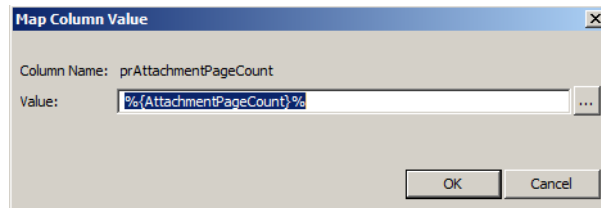
AccuRoute v5.0 adds the option for Administrators to map property values to column names in the **Billing Component**. This allows the mapped values to be used, for example, in templates. Previously, any changes or additions to column were made within the AccuRoute Archive database. Now you can map specific values to individual columns in the **Billing Properties**.

To map a value to a Billing Column Name:

- 1 In the Omtool Server Administrator, select **Components** and double-click the **Billing** component. The **Billing Properties** screen appears.
- 2 Select the **Configuration** tab.



- 3 Make sure **Enable collection of data** is selected.
- 4 Select a **Column Name** for which you want to map a property and click the **Map** button.



- 5 The **Map Column Value** pop-up screen appears. Click ... and select the property of interest.
- 6 Click **OK** and click **OK** again.

Devices Node

The **Devices Node** has been updated with the following features:

- [New attribute mapping files](#) (17)
- [New Managing Devices screen](#) (17)
- [New Device Information and Job Queue buttons](#) (23)
- [New Confirmations tab for device buttons](#) (23)

- [Simplified property transformations](#) (27)
- [Updated issue reporting](#) (28)

New attribute mapping files

AccuRoute v5.0 offers two new .xml files for **Attribute Maps**. These files provide options for system environments using a mail server other than Exchange. These more generic files do not use Exchange-specific attributes.

The attribute mapping is used with device and web authentication. To allow your devices and the AccuRoute Web Client to correctly populate fields, you can use:

- **LDAP.default.xml** – a generic set of attributes
- **Blank.default.xml** – an empty attribute map

To set the Attribute Map for a device group in the Administrator:

- 1 In the Omtool Server Administrator, select the **Devices Node** and right-click on the device group of interest. Select **Properties**. The **Device Group Properties** screen appears.
- 2 On the **Authentication** tab, find **Attribute Map** in the **LDAP Lookup Settings** section.
- 3 Select the .xml file of interest from the drop-down menu.
- 4 Click **OK**.

To configure the Web Client to use either of the new mapping files:

- 1 Go to `C:\Program Files (x86)\Omtool\WebClient\Configuration` and open the `Web.xml` file for editing.
- 2 In the `Web.xml` file, you need to edit the line
`<Attributes>Notes.default.xml</Attributes>`
replacing `Notes.default.xml` with either `LDAP.default.xml` or `Blank.default.xml`.
For example, to change the attribute map used for the Notes authentication, edit the line to read:
`<Attributes>LDAP.default.xml</Attributes>`
- 3 Save and close the `Web.xml` file.

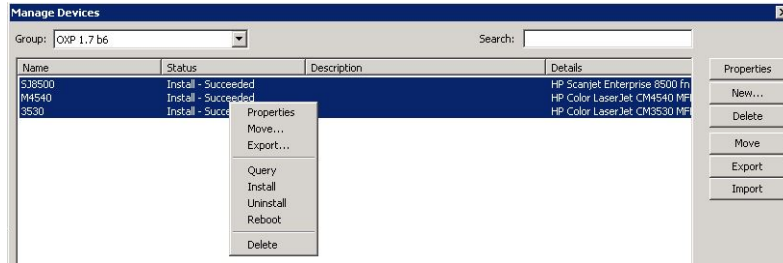
Note To edit the .xml attribute mapping file configuration for the Web Client, you can edit *any* `<Attributes>` line in the `Web.xml` file for the same result.

- 4 Close any current web sessions on the server and restart IIS.

New Managing Devices screen

AccuRoute v5.0 introduces the **Manage Devices** screen for the Administrator, from which you can globally manage and configure multiple devices in your environment. Able to support a large-scale deployment of devices, the **Manage Devices** screen is accessed from the **Devices Node**.

The **Manage Devices** screen includes a main section listing devices from a selected group and a series of function buttons on the right-hand side. You can access additional functionality when you right-click any device(s) in the list. A drop-down menu of the **Manage Devices** options appears.



This feature allows administrators to access devices within any device group for

- [Adding and removing devices to and from device groups](#) (18)
- [Moving devices from one device group to another](#) (19)
- [Searching for device models within a device group](#) (20)
- [Changing device name, description or IP address](#) (20)
- [Setting global Password and SNMP properties for device installation](#) (21)
- [Installing AccuRoute buttons onto multiple devices](#) (21)
- [Exporting and importing device group information for AccuRoute servers](#) (22)

Note The **Manage Devices** screen is only available for HP, Sharp and Samsung devices.

Adding and removing devices to and from device groups

To add devices to a device group:

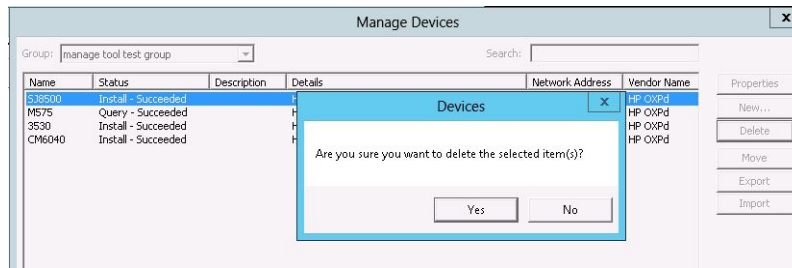
- 1 In the Omtool Server Administrator, right-click the **Devices Node** and select **Manage**. The **Manage Devices** screen appears.
- 2 Select the device group of interest from the **Group** drop-down menu.
- 3 Click the **New** button. The **Properties** screen for the device appears.
- 4 Enter the appropriate information for a new device and click **OK**. The new device appears in the device list for the selected device group.
- 5 Click **Close** to finish.

Note You cannot create device groups in the **Manage Devices** screen. To create a new device group, on the Server Administrator select **Devices Node > New > device group**.

To remove devices from a device group:

- 1 In the Omtool Server Administrator, right-click the **Devices Node** and select **Manage**. The **Manage Devices** screen appears.
- 2 Select the device group of interest from the **Group** drop-down menu.
- 3 Select the device(s) of interest from the list and click the **Delete** button.

- 4 You are asked to confirm whether you want to delete the device.

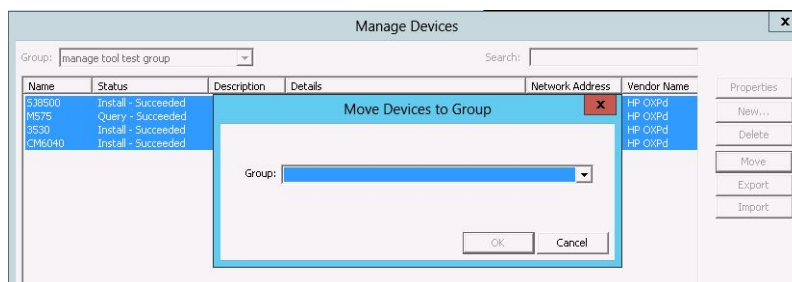


- Click **Yes**. The selected device disappears from the device list.
- 5 Click **Close** to finish.

Moving devices from one device group to another

To move devices among device groups:

- 1 In the Omtool Server Administrator, right-click the **Devices Node** and select **Manage**. The **Manage Devices** screen appears.
- 2 In the **Group** drop-down menu, select the device group from which you want to move a device.
- 3 Select the device(s) of interest from the list and click the **Move** button. The **Move Devices to Group** pop-up screen appears.

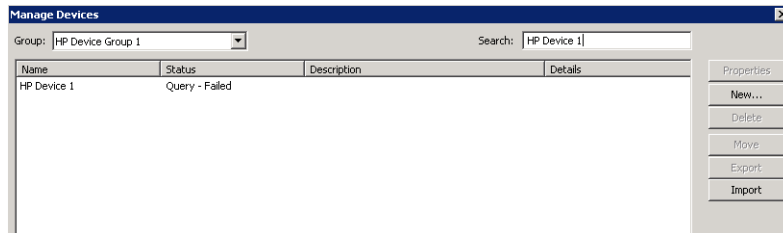


- 4 From the **Group** drop-down menu, select the device group to which you want to move the device and click **OK**.
- 5 Back on the **Manage Devices** screen, select the device group to which you moved the device.
- 6 The device now appears in the device list for that group. You can click **Close** to finish.

Searching for device models within a device group

To search for device models within a device group:

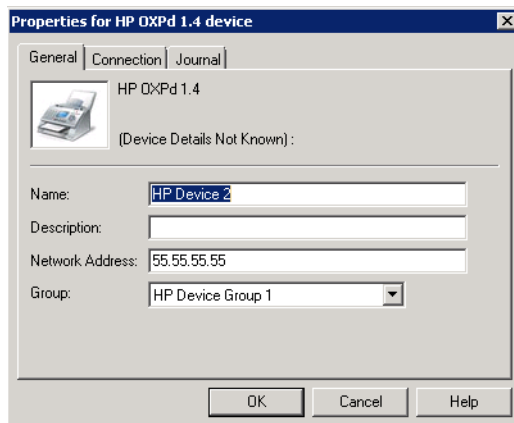
- 1 In the Omtool Server Administrator, right-click the **Devices Node** and select **Manage**. The **Manage Devices** screen appears.
- 2 From the **Group** drop-down menu, select the device group within which you want to search.
- 3 Enter the model number or other search term into the **Search** text box. The system automatically searches and results appear in the main screen, as in the following example:



Changing device name, description or IP address

To change the name, description or IP address for any device:

- 1 In the Omtool Server Administrator, right-click the **Devices Node** and select **Manage**. The **Manage Devices** screen appears.
- 2 Select the device group of interest from the **Group** drop-down menu.
- 3 Select the device whose information you want to change and click the **Properties** button. The device's **Properties** pop-up screen appears.

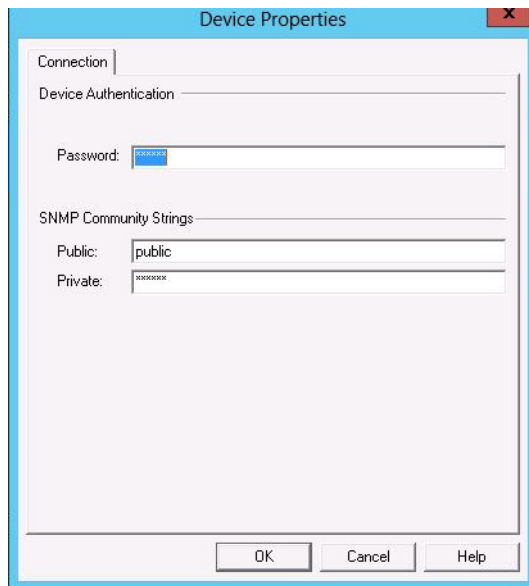


- 4 Make any necessary edits and click **OK**.
- 5 Click **Close** to finish.

Setting global Password and SNMP properties for device installation

To globally apply Password and SNMP properties to a batch of devices:

- 1 In the Omtool Server Administrator, right-click the **Devices Node** and select **Manage**. The **Manage Devices** screen appears.
- 2 Select the device group of interest from the **Group** drop-down menu.
- 3 Select the device(s) in the group whose properties you want to edit and click the **Properties** button. The **Device Properties** screen appears.



An example of the **Device Properties** screen. The appearance of this screen varies by device type.

- 4 Enter the **Username** or **Password** you want to use during the device installation process.
- 5 For HP devices only, in the **SNMP Community Strings** section, enter the **Public** and **Private** passwords for the device installation process.
- 6 Click **OK** and click **Close** to finish.

Installing AccuRoute buttons onto multiple devices

To install the AccuRoute buttons onto a set of devices:

- 1 In the Omtool Server Administrator, right-click the **Devices Node** and select **Manage**. The **Manage Devices** screen appears.
- 2 Select the device group of interest from the **Group** drop-down menu.
- 3 Select the device(s) in the group to which you want to install the AccuRoute buttons.
- 4 Right-click and select **Install** from the drop-down menu. The system installs the buttons on the devices.

Exporting and importing device group information for AccuRoute servers

You can use the **Manage Devices** screen to export detail information for a set of devices to a file from which you can import the data to another AccuRoute server. This allows you to set up the information for numerous devices at once.

The export process creates a spreadsheet file in the **.csv** (comma-separated values) format. The export file data includes device names, IP addresses and properties that will correspond with properties on the server.

	A1							
	A	B	C	D	E	F	G	H
1	prName	prNetwor	prPasswo	prSNMPC	prSNMPC	prUserNai	prDescription	
2	4540	172.16.20.	system	public	public			
3	8500	172.16.20.	system	public	public			
4	x585	172.16.20.	system	public	public			
5	M575	172.16.20.	system	public	public			
6	M630	172.16.20.	system	public	public			
7	M680	172.16.20.	system	public	public			

An example of a .csv export file

To export device information:

- 1 In the Omtool Server Administrator, right-click the **Devices Node** and select **Manage**. The **Manage Devices** screen appears.
- 2 Select the device group of interest from the **Group** drop-down menu.
- 3 Select the devices in the group whose detail information you want to export.
- 4 Click the **Export** button. The **Export Device Details** pop-up screen appears.



- 5 Browse to or enter a **Filename** and path to which you want to save the export file.
- 6 As needed, you can select the **Include passwords (in clear text)** check box.
- 7 Click **OK** and then click **Close** to finish.

To import device group information from the .csv file to an AccuRoute server:

- 1 In the Omtool Server Administrator, right-click the **Devices Node** and select **Manage**. The **Manage Devices** screen appears.
- 2 From the **Group** drop-down menu, select the device group to which you want to import device information from your **.csv** file.
- 3 Click the **Import** button. Select the file of interest from the pop-up screen and click **Open**.
- 4 The device group information from the **.csv** file appears on the **Manage Device** screen for the group you selected.

- 5 Click **Close** to finish.

New Device Information and Job Queue buttons

AccuRoute v5.0 introduces the new [Device Information](#) (40) and [Job Queue](#) (40) buttons. These buttons are configured per device group in the **Device Node** of the Server Administrator.

Note The HP OXPd v1.4 devices support neither the **Job Queue** nor the **Device Information** buttons. The **Mobile Reservations** button is also unavailable for these devices.

Device Information

You can use the **Device Information** button to access a screen of detailed information about the multi-function printer (MFP) with which one is working. Users can press the **Print** button on the **Device Information** screen to print out the information displayed on that device, including fax number, Inbound/Outbound fax supported, business unit, and device name, hostname, IP address and serial number.

Job Queue

You can use the **Job Queue** button to obtain a list of jobs recently submitted to the AccuRoute server from a specific MFP or by a specific user. This is useful, for example, to check the status of jobs for which no notification occurs when complete.

System administrators can configure the type of items or jobs that can be reported. As well, the **Job Queue** functionality depends on whether or not it is accessed by an authenticated user. System administrators can configure the button to report jobs either by device (unauthenticated) or user (authenticated), but the system supports only one type at a time.

The following **Job Queue** options are available:

- **Faxes sent from this device** – Select this option to display a list only of fax jobs sent from this device.
- **All jobs from this device** – Select this option to display all the jobs sent from the device.

Authenticated users can access **All my faxes**. Select this option to display all the faxes sent from the logged-in user.

Users can press the **Print** button on the **Job Queue** screen to print out the information.

For more information on configuring the Device Information and Job Queue buttons, see the *Required Configuration* chapter of the [AccuRoute Embedded Device Client Installation Guide](#).

New Confirmations tab for device buttons

The AccuRoute v5.0 Embedded Device Client adds a **Confirmations** tab to **Button Properties** in the **Device Group Properties**.

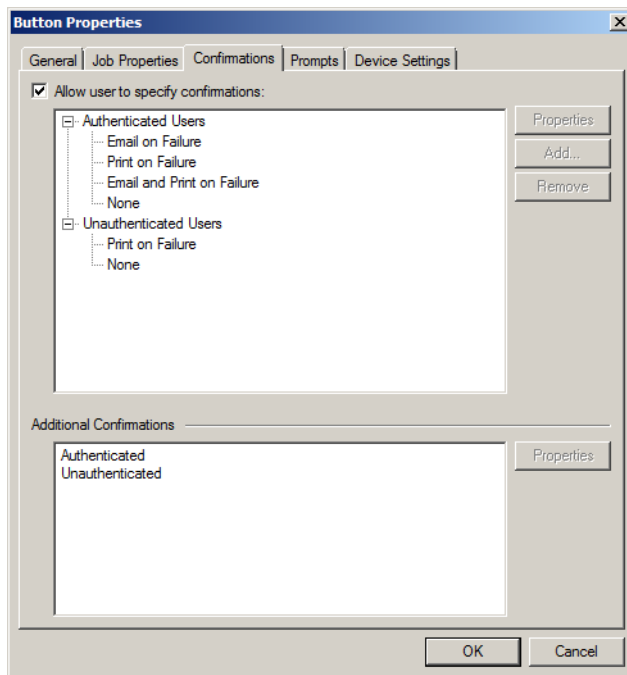
The System Administrator can allow both authenticated and unauthenticated users to request confirmations (notifications of whether or not a document prints, faxes, or is emailed as requested) and define the type of confirmations available to the users, on a per device button basis. This is particularly useful, for example, if one wants notifications for authenticated users sent via email and those for unauthenticated users to print on the device.

Confirmations can be configured for delivery upon document delivery success, failure, or always. Configurable confirmations for delivery On Failure are included by default. You need to create any confirmations you may want to configure for use Always or On Success. For configuration steps, see:

- [Creating confirmations for document delivery success](#)
- [Configuring confirmations for document delivery failure](#)
- [Adding a new property to a specific confirmation](#)

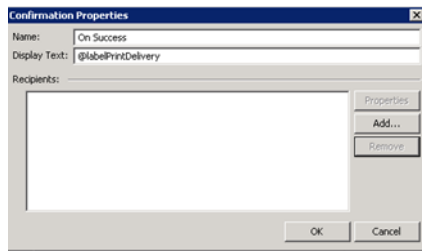
Creating confirmations for document delivery success

- 1 In the AccuRoute Server Administrator, expand the **Devices Node**, right-click the device group of interest and select **Properties**. The **Device Group Properties** screen appears.
- 2 In the **Buttons** tab, select the button for which you want to make confirmations available, such as the **Scan to Me** button, and click **Properties**. The **Button Properties** screen appears.
- 3 On the **Confirmations** tab, select the **Allow user to specify confirmations** check box.



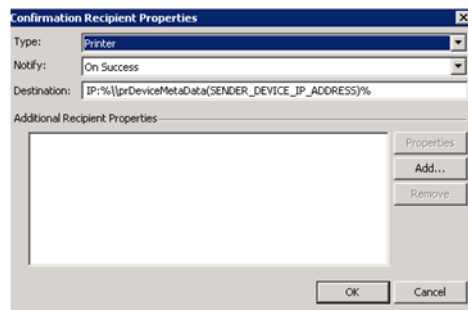
- 4 Before you continue, select one of the default Failure confirmations (such as **Print on Failure**) and click **Properties**.
- 5 Copy or note the default destination value in the **Recipients** field for later use (step 11) and click **Cancel**, returning to the **Confirmations** tab.
- 6 Select either **Authenticated Users** or **Unauthenticated Users** and click **Add**.

The **Confirmation Properties** screen appears.



- 7 Enter a **Name**, such as **On Success**.
- 8 Enter a property for the **Display Text**, such as **@labelPrintDelivery**, and click **Add**.

The **Confirmation Recipient Properties** screen appears.

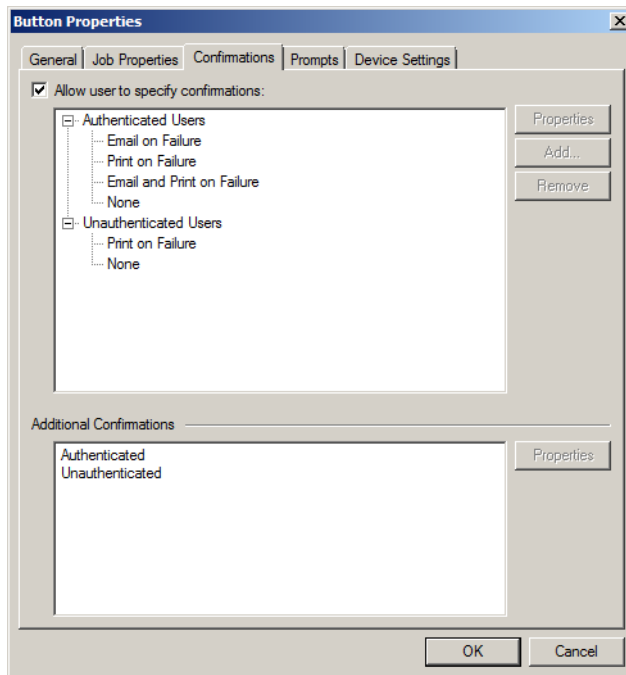


- 9 Select the recipient **Type** of interest from the drop-down menu:
 - ▲ **Email**
 - ▲ **Fax**
 - ▲ **Printer**
- 10 From the **Notify** drop-down menu, select the condition for which you want to set this confirmation:
 - ▲ **Always**
 - ▲ **On Failure**
 - ▲ **On Success**
- 11 In the **Destination** text box, paste or enter the string copied from the default **Print on Failure** destination (in step 5).
- 12 Click **OK** and **OK** again.

Configuring confirmations for document delivery failure

- 1 In the AccuRoute Server Administrator, expand the **Devices Node**, right-click the device group of interest and select **Properties**. The **Device Group Properties** screen appears.
- 2 In the **Buttons** tab, select the button of interest, such as the **Scan to Me** button, and click **Properties**. The **Button Properties** screen appears.

- 3 On the **Confirmations** tab, select the **Allow user to specify confirmations** check box.



- 4 For **Authenticated Users**, select from the following options:

- a Email on Failure
- b Print on Failure
- c Email and Print on Failure
- d None

For **Unauthenticated Users**, you can select either:

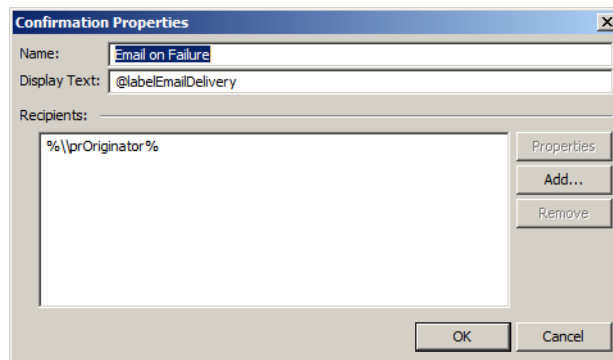
- a Print on Failure
- b None

- 5 Click **OK** and **OK** again.

Adding a new property to a specific confirmation

- 1 In the AccuRoute Server Administrator, expand the **Devices Node**, right-click the device group of interest and select **Properties**. The **Device Group Properties** screen appears.
- 2 In the **Buttons** tab, select the button of interest, such as the **Scan to Me** button, and click **Properties**. The **Button Properties** screen appears.

- 3 On the **Confirmations** tab, select the confirmation type of interest and click **Add**. The **Confirmation Properties** screen appears.



- 4 Click **Add** and select a recipient property.
- 5 Click **OK** and **OK** again.

To remove a property from a specific Confirmation:

- 1 In the AccuRoute Server Administrator, expand the **Devices Node**, right-click the device group of interest and select **Properties**. The **Device Group Properties** screen appears.
- 2 In the **Buttons** tab, select the button of interest, such as the **Scan to Me** button, and click **Properties**. The **Button Properties** screen appears.
- 3 On the **Confirmations** tab, select the confirmation type from which you want to remove a property and click **Remove**. The **Confirmation Properties** screen appears.
- 4 Select the recipient property of interest and click **Remove**.
- 5 Click **OK** and **OK** again.

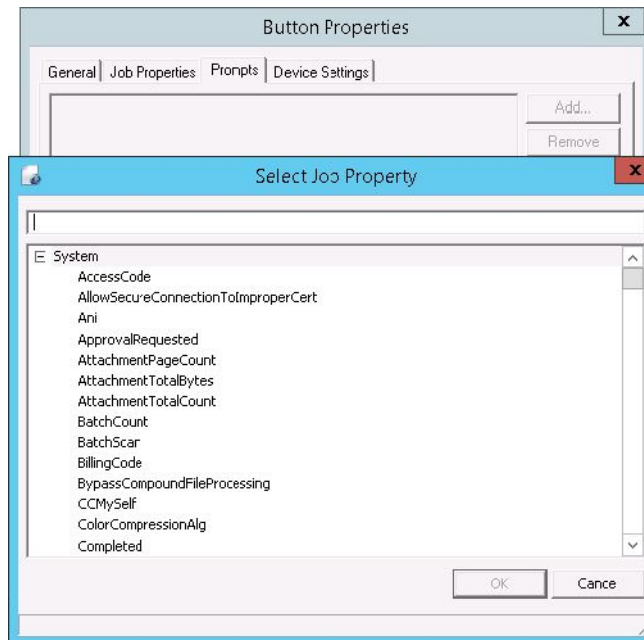
Simplified property transformations

The process of making property **Transformations** has been simplified in AccuRoute v5.0.

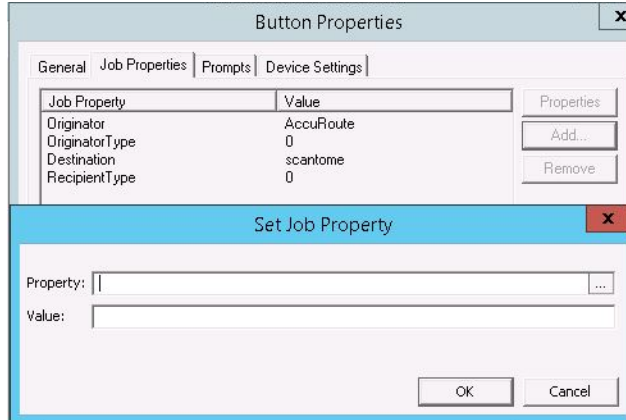
To transform a property:

- 1 In the Omtool Server Administrator, expand the **Devices Node**, right-click the device group of interest and select **Properties**. The **Device Group Properties** screen appears.
- 2 In the **Buttons** tab, select the button to which you want to add a transformation and click **Properties**. The **Button Properties** screen appears.
- 3 On the **Job Properties** tab, click **Add**.

- 4 Click the ... button to open the **Select Job Property** drop-down menu and select the property you want to transform. Click **OK**.



- 5 In the **Set Job Property** screen, enter the value for the property and select **OK**.



- 6 Click **OK** and **OK** again.

Note You can also enter a Job Property in the Value field by adding `%{_____}%` around the Job property name. This transforms a Job Property with a value of another job property.

Updated issue reporting

The Server Administrator now provides more meaningful reports when device installations fail. For example, if the wrong firmware is in place or an inaccurate username and password exist, this information appears in the Journal.

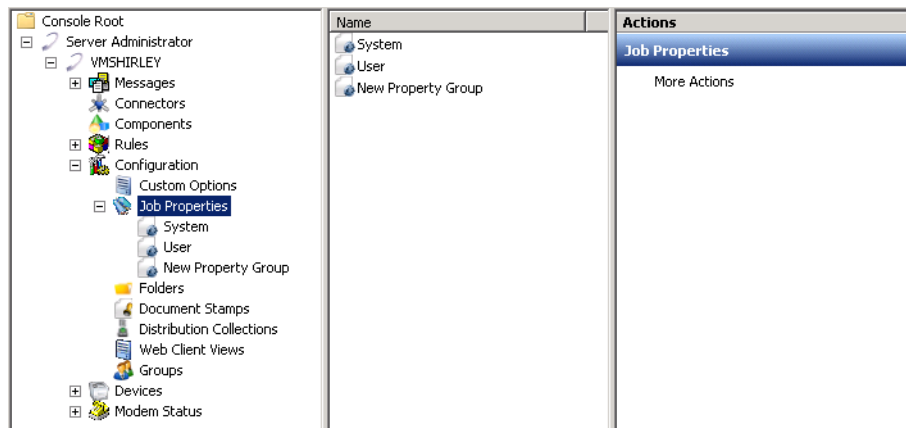
Configuration Node

The **Configuration Node** has been updated with the following features:

- [New look for Job Properties](#) (29)
- [Multiple values for properties](#) (29)
- [New Network Folder destination types](#) (30)
- [Viewing User Permissions](#) (30)

New look for Job Properties

The **Job Properties Node** (previously the Properties Node) now organizes properties by two default folders: **System** and **User**. Administrators can create or modify new **User** properties, or they can create an entirely new properties group. **System** properties cannot be edited.



Multiple values for properties

Administrators can now create **Properties** that allow multiple values. Multi-value properties are supported by the Web Client and Image-In Queue. A new mapping for the Property Definition - called **Collection** - must be assigned to such a property to signify that multiple values can be mapped to it.

When you configure multi-value properties, you can set default values, provide free text fields, or offer specific drop-down menu choices.

To map multiple values to a property:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the **Configuration** node and right-click **Properties**.
- 3 Select **New > Property Dictionary**. The **Property Dictionary Item** page appears.
- 4 In the **General** tab, enter a **Name** and **Label** for the property.
- 5 Select **Generic List** from the **Type** drop-down menu. You must choose **Generic List** in order to be able to map multiple items to the property later in these steps.

- 6 Click **New...** in the **Mappings** section. The **Property Definition** screen appears.
- 7 Select the **Collection** radio button and enter a name for the Collection.
- 8 Click **OK**.
- 9 In the **Items** tab, click **New...** The **List Item Properties** screen appears.
- 10 Enter the name of the collection in the **Value** text box and click **OK**.
- 11 Repeat as needed and click **OK**.

The new Property appears in the results node.

Note Validation is not supported for Collection fields at this time.

New Network Folder destination types

AccuRoute v5.0 provides support for additional cloud-based storage applications to serve as **Network Folder** recipient types for **Messages** and **Distributions**.

The **Network Folders** feature continues to support routing documents to Dropbox™, FTP and network folder share locations. In addition, cloud-based storage for authorized user groups now includes access to

- HP Flow CM
- Microsoft OneDrive (Personal)
- Google Drive
- box

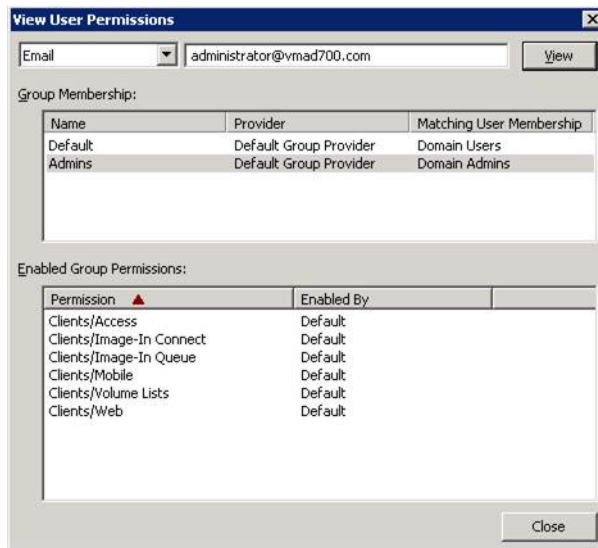
Refer to the [AccuRoute Server Administrator Help](#) for more information on the complete **Network Folder** configuration process.

Viewing User Permissions

With AccuRoute v5.0, you can use the new **View User Permissions** feature to verify the groups for which any given user is enabled, as well as the permissions associated with each group to which the user has access.

To view user permissions:

- 1 In the AccuRoute Server Administrator, select **Configuration Node > Groups**.
- 2 Right-click **Groups** and select **View User Permissions** from the drop-down menu. The **View User Permissions** screen appears



- 3 Select the type of entry you want the system to match in the Active Directory:
 - a **Account Name**
 - b **Distinguished Name**
 - c **Email**
 - d **Principal Name**
- 4 Enter the appropriate value for the type you selected and click **View**. The system displays the **Group Memberships** and **Enabled Group Permissions** associated with that user.
- 5 Click **Close** to finish.

Deprecated items

The AccuRoute v5.0 server no longer supports the following items:

- .XML attachments are no longer composed and delivered on Microsoft Windows 2012 systems.
- The AccuRoute Desktop XPS Printer is no longer supported in AccuRoute v5.0. You can no longer select the Microsoft XPS Document Writer to print to the AccuRoute Desktop by default.

Deprecated items

Omtool Client Updates

This section describes the new AccuRoute Client features for AccuRoute v5.0.

For more information on using or configuring the new features, refer to the [AccuRoute Web Client Online Help](#) and the [AccuRoute Server Administrator Help](#).

This section includes:

- [Client versions in this release](#) (33)
- [Operating System support](#) (34)
- [Requirements](#) (34)
- [Mobile Client](#) (35)
- [Desktop Client](#) (36)
- [Web Client](#) (37)
- [Devices](#) (39)
- [New Image-In Direct Capture Client](#) (41)

Client versions in this release

AccuRoute v5.0 includes the following clients:

Table 5: AccuRoute v5.0 Clients

Client	Version
Mobile Client	5.0
Web Client	5.0
AccuRoute Desktop	5.0
AccuRoute Embedded Device Client	5.0
Embedded AccuRoute for Xerox (EIP) Device Client	5.0
Embedded AccuRoute for Ricoh (ESA) Device Client	5.0
HP OXPd v1.4	1.4.5
Extension for Worksite	5.0
Extension for MS SharePoint	5.0

Table 5: AccuRoute v5.0 Clients

Client	Version
Extension for DM	5.0
Image-In Connect	5.0
Image-In Queue	5.0
Image-In Direct Capture	5.0
Image-In Acquisition	5.0
Cost Recovery	5.0
Print to AccuRoute	5.0
FaxCenter	5.0
Fax Service Receiver	5.0

Note Image-In Direct Capture is only available when the Omtool Healthcare Suite feature is installed.

Operating System support

AccuRoute v5.0 supports

- Microsoft Windows 2012 x64
- Microsoft Windows 2012 R2 x64
- Microsoft Windows 2008 R2 x64

Requirements

Review the following requirement before working with the new client features:

- To upgrade to the current version, you must uninstall any existing client and then install the new AccuRoute v5.0 Client. For more information on upgrading the clients, refer to the *AccuRoute Device Client Installation Guide* on the [AccuRoute v5.0 documentation home page](#).

Mobile Client

Using the AccuRoute Mobile Client, AccuRoute users can preview and send documents from their mobile device, create Mobile Reservations for future scanning, and configure Personal Distributions. Access Group and Preset Distributions can be configured by the System Administrator and made available on a permission basis. Users can also define alerts and set default preferences.

Server Administrators configure permission to use the Mobile Client in **Group Properties** on the **Configuration** node. For more information on configuring and using the Mobile Client, refer to the [Omtool Server Administrator Help](#).

When AccuRoute Mobile Client users make **Mobile Reservations**, they are creating a **Mobile Scan Reservation Code** for later use at an MFP inside or outside their business network. The system uses the Mobile Scan Reservation Code to appropriately distribute the submitted document information.

The AccuRoute Mobile Client v5.0 introduces the following new feature:

- [Localization](#) (35)

Requirements

- A mobile device running any of the following:
 - iOS 6.x or higher
 - Android 2.3.3 Gingerbread through Android 4.4 KitKat (API levels 10 – 19)
- appropriate licenses for the Mobile Client and Mobile Device Application

Note You must download the Mobile Client application directly from the iTunes Store® or Google Play™ to your device. For more information on installing and configuring the Mobile Device Application and the Mobile Client, refer to the [AccuRoute Installation Guide](#).

Localization

The AccuRoute v5.0 Mobile Client is now localized for the following languages:

- Simplified Chinese
- French
- German
- Italian
- Brazilian Portuguese
- Spanish

Desktop Client

Hiding the Desktop Watch Folder icon

In the AccuRoute v5.0 Desktop Client, you can now hide the AccuRoute Desktop **Watch Folder** icon in the task tray.

As a component of the AccuRoute Desktop Client, the Watch Folder gathers files deposited in specific folders and processes them through the AccuRoute Server. The Watch Folder's task tray icon normally runs by default upon Windows startup.

The ability to hide the Watch Folder's task tray icon can prevent the possibility of it being closed by accident, disabling the Watch Folder.

To hide the AccuRoute Desktop Client Watch Folder icon in the task tray:

- 1 With the AccuRoute Desktop launched, the Watch Folder is automatically enabled.
- 2 Close the Desktop, disabling the Watch Folder tray icon (and application).
- 3 Enter `%appdata%` in your system's **Run** command to locate the following file:

```
%appdata%\Omtool\AccuRouteWatchFolder\AccuRouteWatchFolder.xml
```

The default location is

```
C:\Users\(username)\AppData\Roaming\Omtool\AccuRouteWatchFolder.
```

- 4 Open the `.xml` file for editing.
- 5 In the file, change the value for `prVisible` to `0`.
- 6 Save and close the `%appdata%\Omtool\AccuRouteWatchFolder\AccuRouteWatchFolder.xml` file.

When you start the Desktop again, the Watch Folder is enabled (active), but no icon appears in the task tray.

To make the Watch Folder icon visible in the task tray:

- 7 Close the AccuRoute Desktop, disabling the Watch Folder application.
- 8 Enter `%appdata%` in your system's **Run** command to locate the following file:

```
%appdata%\Omtool\AccuRouteWatchFolder\AccuRouteWatchFolder.xml
```

The default location is

```
C:\Users\(username)\AppData\Roaming\Omtool\AccuRouteWatchFolder.
```

- 9 Open the `.xml` file for editing.
- 10 In the file, change the value for `prVisible` back to `1`.
- 11 Save and close the file.

When you start the Desktop again, the Watch Folder icon appears in the task tray.

Web Client

This section describes the new Web Client features for AccuRoute v5.0. For more information about configuring the following features, refer to the [AccuRoute Web Client Online Help](#).

The AccuRoute Web Client v5.0 introduces the following:

- [Support](#) (37)
- [New Folder recipient types](#) (37)
- [Mobile Reservations](#) (38)

Requirements

Review the following requirement before working with the new Web Client features:

- The Web Client must be upgraded to AccuRoute v5.0.
To upgrade to the current version, you must uninstall the existing Web Client and then install the new AccuRoute Web Client v5.0. For more information on upgrading the Web Client, refer to the [AccuRoute v5.0 documentation home page](#).

Support

The AccuRoute v5.0 Web Client is now:

- qualified with Microsoft Windows 8 x32 and Windows 8 x64.
- supported on the Google Chrome™ internet browser.

New Folder recipient types

Authorized AccuRoute Web Client users can access **Network Folders** as recipient types in both **Messages** and **Distributions**.

With this release, cloud-based storage for authorized user groups now includes access to

- HP Flow CM
- Microsoft OneDrive (Personal)
- Google Drive
- box

Note The software may enable you to send data to third parties in connection with use of their services, including box, Google (Google Drive) or Microsoft (Microsoft OneDrive).

AccuRoute v5.0 continues to support FTP, UNC, and cloud-based storage (such as Dropbox) Network Folder destinations.

User Group access to the folders is configured by the AccuRoute Server Administrator.

Mobile Reservations

You can now configure access for Web Client v5.0 users to work with Mobile Reservations.

When users create a **Mobile Reservation**, the system provides a numerical code for later use at an MFP inside or outside the business network. The system will use the code to appropriately distribute the submitted document information.

Web Client users can create new Mobile Reservations, and view or cancel existing Mobile Reservations. In order to work with Mobile Reservations, Web Client users need

- an enabled Mobile Reservations Folder for the appropriate Web Client View
- existing Distributions

Enabling the Mobile Reservations Folder

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the **AccuRoute Server Administrator** and select **Configuration > Web Client Views**.
- 3 Double-click the view of interest (**view.admin.xml** or **view.default.xml**). The **Web Client View Properties** page appears.
- 4 In the **Folders** tab, under **Distributions**, select **Mobile Reservations** and click **Properties**. The **Folder Properties** page appears.
- 5 Select the **Display this folder** check box and click **OK**.
- 6 Click **OK** again.

The Mobile Reservations Folder is now enabled for this Web Client View.

Creating a Mobile Reservation

Note You must have existing Distributions to create a Mobile Reservation.

- 1 In the Web Client, click the **Distributions** Folder and select the check boxes for the distribution(s) of interest or check the box at the top of the table to select all distributions.
- 2 Click the **Create Mobile Reservation** button at the top of the screen.
- 3 A **Reservation Confirmation** number appears in the results node.

Make note of this number as you will need to enter it in the subject line when you scan and email your documents.

Viewing Mobile Reservations

In the Web Client, select **Distributions > Mobile Reservations** Folder. All of the user's current Mobile Reservations appear in the results node.

Canceling Mobile Reservations

- 1 In the Web Client, select **Distributions > Mobile Reservations** Folder.
All of the user's current Mobile Reservations appear in the results node.
- 2 Select the check boxes for the Reservation(s) of interest or check the box at the top of the table to select all Mobile Reservations.
- 3 Click the **Delete** button at the top of the screen. The selected Mobile Reservation(s) are canceled.

Devices

AccuRoute v5.0 introduces the following new Device features:

[New Device Support](#) (39)

[New Confirmations option for device buttons](#) (40)

[New buttons for the Embedded Device Client](#) (40)

Requirements

Review the following requirement before working with the new Device features:

- Devices must be upgraded to AccuRoute v5.0.
To upgrade to the current version, you must uninstall existing devices and then install v5.0. For information on upgrading the devices, refer to the Embedded AccuRoute Software installation guides on the [AccuRoute v5.0 documentation home page](#).

New Device Support

The AccuRoute v5.0 Embedded Device Client adds the following MFPs to its list of supported devices:

- HP Color MFP S962dn
- HP Color MFP S970dn
- HP Color MFP S951dn
- HP MFP S956dn
- HP OfficeJet Color MFP x585
- HP Flow MFP M680
- HP Flow MFP M630

New Confirmations option for device buttons

The AccuRoute v5.0 Embedded Device Client now offers a **Confirmations** option for device buttons. Authenticated and unauthenticated users can use confirmations for notification (at the printer, by fax, or by email) of whether or not a document was delivered as requested.

Your System Administrator configures the types of confirmations available, per device button, to device users. For example, a device button could be configured to allow unauthenticated users to request a confirmation to print on the device if the selected button action, such as faxing, fails.

For more information on adding and configuring confirmation options, refer to [New Confirmations tab for device buttons](#) (23).

New buttons for the Embedded Device Client

AccuRoute v5.0 introduces the **Device Information** and **Job Queue** buttons. For more information on adding and configuring the buttons, refer to [New Device Information and Job Queue buttons](#) (23).

Note The HP OXPd v1.4 devices support neither the **Job Queue** nor the **Device Information** buttons. The **Mobile Reservations** button is also unavailable for these devices.

Device Information

With the **Device Information** button, users can access a screen of detailed information about the multi-function printer (MFP) with which they're working, including:

- Fax number
- Inbound/Outbound Fax supported
- business unit
- Device name
- Device IP address
- Device serial number
- Device hostname

Also, a **Print** button is available on the **Device Information** screen, so users can print out the information displayed on that device.

Job Queue

Using the **Job Queue** button, users can obtain a list of jobs recently submitted to the AccuRoute server from a specific MFP or by a specific user. This is useful, for example, to check the status of jobs for which no notification occurs when complete.

Job Queue functionality depends on whether or not you are logged in as an authenticated user.

With unauthenticated access, **Job Queue** can provide a list of all items previously scanned on an MFP, based on the serial number and IP address of that device. The system administrator configures the type of items or jobs that can be reported.

For authenticated users, **Job Queue** can list any previously scanned items associated with the logged-in user.

Note System administrators can configure the **Job Queue** button to report jobs by either device or user, but the system supports only one way at a time (per device group).

New Image-In Direct Capture Client

AccuRoute v5.0 introduces the new **Image-In Direct Capture Client** as part of the new **Omtool Healthcare Suite**. Image-In Direct Capture is an Omtool client application with which users can enter patient documentation into electronic medical records.

The System Administrator for your organization will install and configure the Image-In Direct Capture application on user workstations.

Once the application is installed and a user logs in to their workstation, Image-In Direct Capture automatically loads and the **Queue** icon appears in workstation system trays. When a user registers a patient in the HIS, the main Image-In Direct Capture screen automatically opens.

Note If the connection to the server is established, the Queue icon in the system tray turns green. Otherwise, the Queue icon remains red. Contact your System Administrator if the Queue icon remains red or any error message appears.

For more information about installing, configuring, and using the Image-In Direct Capture Client, see the [Image-In Direct Capture Installation and User Guide](#).

For more information about the [Healthcare Suite Custom Installation option](#), contact [Omtool Customer Service](#).

New Image-In Direct Capture Client

Issues and Limitations

Resolved issues

The following issues were found in the Omtool test laboratory during testing and are resolved in AccuRoute v5.0:

Table 6: Resolved issues

Issue	Description
AR-1330	Notification messages are generated even when the Do not notify option is selected while sending a message from an HP Device.
AR-1343	The server generates larger files with black and white (jbig) compression than an HP Native device. Black and white scans sent through a native device are smaller than the maximum compression through the server.
AR-1350	Inbound messages are generated for every alternate fax using SR140 channels.
AR-5062	When the HP OXP Device is set to display Simplified Chinese, buttons appear in English.
AR-5847	The device description is no longer overwritten when the device is successfully queried.
AR-6501	HP OXP Devices may show an install status of 'Failed' when the device is in a power cycle during installation. To successfully install the Device Client, select the Install feature after the device is powered up.
AR-6768	For HP Pro devices only, if you use a Distribution with landscape orientation as a scan setting, the document delivered using this Distribution arrives in portrait orientation.
AR-6986	On HP OXPd v1.4 devices, when sending a Distribution using the Scan to Distribution button, the scan settings for that Distribution are not applied.

Known issues

The following issues are known for AccuRoute v5.0:

Table 7: Known issues

Issue	Description
AR-6497	The prior version of the Universal Output connector is neither supported nor updated by this release. You need to manually enable the connector after installation of AccuRoute v5.0.
AR-6498	When using the AccuRoute v5.0 Server with a prior version of the Web Client, if you add Job Properties for a Volume List search, for which you want the results to appear in the Web Client Archive Node, those properties do not appear.

Table 7: Known issues

Issue	Description
AR-7074	When connecting to the Mobile Client, users receive the error message 'Failed to get user's group information - unauthorized.' As a solution, verify that on the IIS server all IIS Roles, including security, are installed.
AR-7197	On localized MFPs, when an incorrect username and/or password are entered for authentication, the response 'The user name or password is incorrect.' is not localized.

Limitations

The following limitations are known for AccuRoute v5.0

Table 8: Limitations

Limitation	Description
AR-5978	In Image-In Direct Capture, if you add a new pane without properly configured system connections, the new pane appears blank with a red x and an incorrect date/time stamp.
AR-6066	On a LaserJet Flow M525 MXP device, there is a 75-character limit for a prompt field associated with a button.
AR-6532	If you have upgraded from AccuRoute v4.1 Feature Pack 1 to v5.0 without upgrading your Image-In Queue client, any existing messages no longer appear in Image-In Queue. For compatibility, the Image-In Queue Client needs to be upgraded to v5.0.
AR-6735	On HP OXPd v1.4 devices, support is unavailable for <ul style="list-style-type: none"> • Job Queue button • Device Information button • Mobile Reservations button (existing Mobile reservations appear under Personal Distributions) • Fax button feature 'User may modify their Sender Name' option in Fax properties
AR-7094	Take the following steps to hide the Watch Folder tray icon: <ol style="list-style-type: none"> 1 Configure the Watch Folder for Launch to AccuRoute. 2 Check whether the AccuRoute Desktop launches when dropping a file. 3 Close the tray icon application. 4 Open %appdata%\Omtool\AccuRouteWatchFolder\AccuRouteWatchFolder.xml and edit the configuration to use a prVisible node in the top level (a good location is after prServer) and set it to 0. 5 Enable the Watch folder. 6 Verify that it still functions normally and that the icon is no longer visible in the tray.
AR-7110	When using a Remote Intelligent Device Client and HP OXP v1.4 devices, an error message appears if you try to login to a HP v1.4 device and use the Personal Distribution button. Instead, on the Remote Intelligent Device Client system, launch IIS and select Application Pools. Select the OXPAppPool and change the Identity to the AccuRoute Service Account.
AR-7215	In a Windows 2012 environment, the pre-installation pack neither includes nor configures MS.NET 3.5 SPI.
AR-7216	In order for cloud-based Folders (such as Microsoft OneDrive or box) to properly appear in the Web Client, restart the browser after configuring user permissions. This reloads the configuration for the Web Client.

Table 8: Limitations

Limitation	Description
AR-8478	<p>When using the Ricoh Embedded Device Client, to set the default Color Mode to Color, you also need to set the File Intermediate format to JPEG. If it is set to TIFF instead, the default color mode will be Monochrome. To set the default Color Mode to Color:</p> <ol style="list-style-type: none"> 1 In the Server Administrator, expand Devices and right-click the Ricoh Device Group. 2 Select the Properties menu option. 3 In the Buttons tab, highlight the button of interest and click Properties. 4 On the Device Settings tab, highlight File Intermediate Format and click Properties. 5 In the Device Settings Properties popup, select the JPEG File Intermediate format and click OK. 6 Highlight Color Mode and click Properties again. 7 Select Color for the Color Mode, click OK, and click OK again. 8 When you test the button on the device, the Color Option should be Color mode.
AR-8538	<p>If you need to re-add the MyFiles button to a Xerox device (after initially adding a new Group), you need to select the Scan to Destination button and rename it MyFiles. The MyFiles button appears as a default choice only when adding a new group. To re-add the MyFiles button:</p> <ol style="list-style-type: none"> 1 Remove the existing MyFiles button from the device group of interest. 2 In Device Group Properties > Add Button, select Scan to Destination from the drop-down Type list, edit the Name to MyFiles, and click OK. This updates the button name display in the ScanFacts Server Administrator. 3 With Scan to Destination still selected, to update the displayed name and image for the button on the device, click Device Group Properties > Properties. On the Button Properties screen, enter Name: MyFiles Display Text: @buttonmyfiles Text Image: myfiles 4 Click OK and OK again.

Limitations