Image-In™ Queue Installation and Configuration Guide

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Section 1: Introduction

This guide contains instructions on installing and configuring the Image-In Queue Client application. The intended audience of this guide are System Administrators with advanced knowledge of the AccuRoute Server.

This section includes:

About Image-In Queue

Image-In Queue is a desktop component of Omtool's enterprise AccuRoute document management system that provides a viable digital alternative to traditional paper based document management and routing systems. It can be deployed as a standalone configuration along with the Image-In Acquisition Client or as a component of an enterprise e-document delivery and management system. The advantage of using Image-In Queue is that it processes documents in a workflow bound for a document management system (or Object Archive™). For information on Image-In Queue and other AccuRoute products, visit the Omtool products Website at: http://www.omtool.com/products\ImageInQueue.cfm and call Omtool Sales at Sales@Omtool.com.

How Image-In Queue works

The Image-In Queue (also referred to as IIQ) software processes scanned documents that are routed to predefined Queues as messages. The documents can be scanned into IIQ using Omtool's Image-In Acquisition Client software or from a multifunction device. The Queues are pre-configured in the Omtool Server Administrator where the Administrator assigns access rights and permissions to predefined user Groups.

When an Image-In Queue operator logs into IIQ, the user has access to all scanned documents in the Queue. The user can open a new document for processing, assign deficiencies (mark them as lacking in requirement information) or route the document to a specific destination. To maintain data integrity, only one IIQ operator can view/process a document in IIQ at any given point in time. However, if a document was opened for processing and was not freed up after a specified length of time, it is automatically freed up for processing.

The IIQ operator can perform various tasks while processing messages. They can, for example:

- Route documents to a specific destination (for example, email, fax, printer or ObjectArchive).

- Assign deficiencies (note missing information and send them to users who can provide the missing value). For example, you notice a missing signature and assign an e-signature request on it and send it to the person who should be providing the e-signature.

- Merge and split documents, manually release a lock or move a document to processed depending on assigned permissions (by the Omtool Server Administrator).

Release notes

Enhancements

This release has the following enhancements.

☐ Ability to automatically select the next record when the Release option is selected - The selected record is locked and cannot be modified.

☐ Ability to select and release multiple records simultaneously - This enhancement allows faster and more efficient record processing in a queue.

☐ Ability to select next record - When a record leaves an IIQ folder after any operation in IIQ or outside of IIQ, if an appropriate next record is available it is automatically selected.

☐ Ability to release a record folder - Image- In Queue v5.0 allows you to select a record folder, right click and select the Release All option from the drop down menu to release all the records in the folder. The operator can cancel the release after each individual record is processed. In case of invalid data or some other anomaly in a record, the operator will be presented with a reconciliation dialog. When the operator cancels the release of that particular record, the whole release operation is cancelled.

☐ Property Expressions feature - This feature allows a job to be processed based on the values of properties. For example, the Administrator can configure jobs to be released from Image-In Queue based on a property expression.

☐ Route to multiple Queues for Rescan deficiency - When a Rescan deficiency is created, an Embedded Directive is created for the Rescan routing sheet, and this Embedded Directive has a recipient that is an IIQ type recipient with a destination of "IIQ".

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

☐ Route to another Queue - Image-In Queue allows you to route a job to a different Queue using the action Reassign Queue in a workflow.

☐ Validation allows for automatic field formatting - Administrators can configure a set of property formatters in the Formatting tab of the Property Dictionary Item configuration page in the Omtool Server Administrator. The property formatters take a client user's entered value and converts it to another value. The possible formatters are upper/lowercase, add prefix, add suffix, insert characters, replace characters, and remove characters. A formatter is configured with a regular expression to match against and one or more formatting actions to take when a match occurs.

☐ Cursor advancement - The cursor automatically moves to the next document in list view as soon as the previous document has been processed.

❒ Image-In Queue v5.0 supports automatic validation of meta data - Data no longer needs to be validated manually by opening the Edit Data dialog. If the automatic validation is successful, the jobs are release from the queue.

❒ Edit Data enhancements:

• Edit Data selects first non validated field - When the Edit Data dialog opens, the cursor is placed in the first field that has not been validated.

• Edit Data Validation on tab - If an item is configured for validation and for validation pullback, validation occurs when the TAB key is pressed. The green and red check boxes are updated. However, confirmation is not shown until the OK button is pressed.

• Edit Data controls match their configured types set in the Property Dictionary Item in addition to Edit text boxes.

• Image-In Queue data entry is streamlined.

○ Edit Data dialog can be shown or hidden through toolbar button or a menu item. You can also click on a page outside of the dialog box without having to close it first.

○ Edit Data dialog automatically tracks selection of records. The dialog gets disabled if multiple records are selected.

○ Edit Data dialog is a tool window dialog.

○ Edit Data dialog remembers its location.

○ Edit Data dialog has Apply and Reset buttons. These replace the OK and Cancel buttons in previous releases.

• Edit Data dialog allows the operator to paste previously applied data. The operator will use the ALT+ V action to paste the previously applied meta data to proper edit fields. The data is automatically validated and also saved on successful validation.

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

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

• Edit Data option is available as a right click menu option from a folder within in Image-In Queue.

• Double-clicking a document opens the Edit Data Dialog or transfers focus to an already open Edit Data dialog.

• Image-In Queue operators can open the Edit Data dialog by pressing the Enter key from the list view.

• Edit data fields match the required properties for the queue when multiple queues exist.

❒ Deficiency enhancements:

• The Omtool Administrator can define which deficiencies should be associated with a Queue.

• The Omtool Administrator can define which deficiency is the default for a Queue.

• The Omtool Administrator can define properties that much be valid for a Queue before a deficiency can be assigned to it.

- Batch the deficiency email sent to doctors - Instead of sending a separate email for each deficiency, Image-In Queue allows you to batch the notifications for the patient's chart and send one email at a specific time of the day (for example, at midnight).

- Deficiency maintenance - The Omtool Administrator can limit the number of deficiencies for a Queue.

- Image-In Queue operators can now control the placement of the E-signature deficiency. When assigning a deficiency, the operator is now prompted to place the E-signature location annotation in the correct spot before a notification is sent to the assignee.

- Image-In Queue operators can assign multiple deficiency types in the Deficiency page. In previous versions, they could only assign one type.

Resolved issues

In this release, the following issues were resolved as new features and enhancements:

17578 – IIQ data entry needs to be streamlined

17740 - Enhancement - Provide the option to batch the deficiency email sent to doctors

17579 - Validation is incomplete (compared to MedScan)

17619 - Adjusting placement of E-signature before sending it off

17616 - Copying AccountNo and MedrecNo to next image

17617 - Cursor position when prompted for data in IIQ

17618 - Cursor advancement within IIQ when image is completed

For more details, consult the Enhancements section above.

Known issues

Image-In Queue v5.0 has the following known issues.

18176 - On the Queue properties MEDITECH tab, if Enable document notifications to MEDITECH option is not enabled, then the Image-In Queue Component will not hang on to jobs and instead return an E_INVALIDARG failure. The workaround is to enable this option.

17228 - The DMS Extractor Utility cannot return more than 512 records from the Autonomy iManage WorkSite repository.

Deployment summary

To deploy Image-In Queue:

1 Verify that the AccuRoute Server and the Clients meet the requirements. (Go to Section 2: Requirements.)

2 Install Image-In Queue (Go to Section 3: Installation.)

3 Connect to Image-In Queue (Go to Section 4: Post-Installation Operations.)

Related AccuRoute 5.0 documentation

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

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

Section 2: Requirements

This section includes:

AccuRoute Server requirements

❒ AccuRoute Server v5.0 (For installation instructions, see the AccuRoute Server Installation and Integration Guide)

Note For AccuRoute Server running on Windows 2008 64 bit system - Allow Dynamic RPC for the local port 135. For instructions, see Note about connecting to an AccuRoute Server installed on a Windows 2008 system (2-2)

Image-In Queue client requirements

The hardware and software requirements for the system where you can install Image-In Queue are as follows:

Tip You can install Image-In Queue on the system running the AccuRoute Server.

❒ Pentium®-class processor

❒ Windows 8, Windows 7 (x32 or x64)

❒ 20 MB hard disk space

❒ 64 MB RAM (128 recommended)

❒ Acrobat® Reader® 7.x or higher

Supported email applications

❒ Microsoft® Outlook® 2007(Outlook Express not supported)

❒ Notes 6.5/6.0/5.0

When Image-In Queue is configured to integrate with an address book for a supported e-mail application, the e-mail application must be selected as the Windows default e-mail application. For more information, consult Windows help.

Note about connecting to an AccuRoute Server installed on a Windows 2008 system

To allow Image-In Queue to connect to AccuRoute Server running on Windows 2008 system:

1   In the Windows 2008 system, open the Server Manager.

2   Select **Windows Fire Wall with Advanced Security**.

3   Select **Inbound Rules** under it, on the right select **New Rule**.

4   Create a new Windows Firewall Inbound Rule.

5   Select **Port**.

6   Select **TCP** and enter port 135 (you will change this port after the rule is created).

7   Select **Allow the Connection**.

8   Select **Domain**, **Private**, **Public**.

9   Name the rule as appropriate, for example **DCOM RPC** (or something else).

10   After rule is created enter the rule's properties.

11   Go to the **Protocols and Ports** page.

12   Change **Local Port 135** to **Dynamic RPC**.

13   Press **OK** to save your changes.

Section 3: Installation

This section includes:

Accessing the Setup files

After AccuRoute v5.0 is installed on the AccuRoute Server, the Image-In Queue setup files are located in the **C:\Program Files\omtool\Omtool Server\clients\ImageInQueue** directory of the system running the AccuRoute Server. If you are installing Image-In Queue on the same system, simply navigate to this folder to access the setup files.

If you are installing Image-In Queue 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\ImageInQueue** directory. You can also copy the setup files to a shared network directory.

Installing Image-In Queue

To install Image-In Queue:

1   Log on to the client where you will install Image-In Queue using the Omtool Service Account credentials.

2   Click **setup.exe**. The InstallShield Wizard configures your system and shows the **Welcome** message.
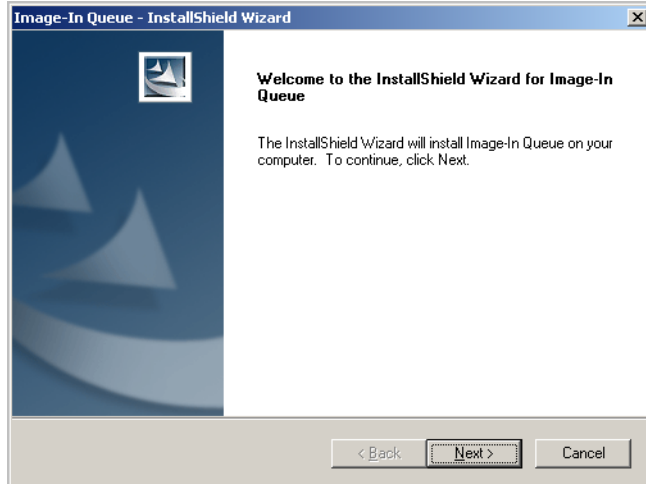
3   Click **Next**. The setup shows the license agreement.
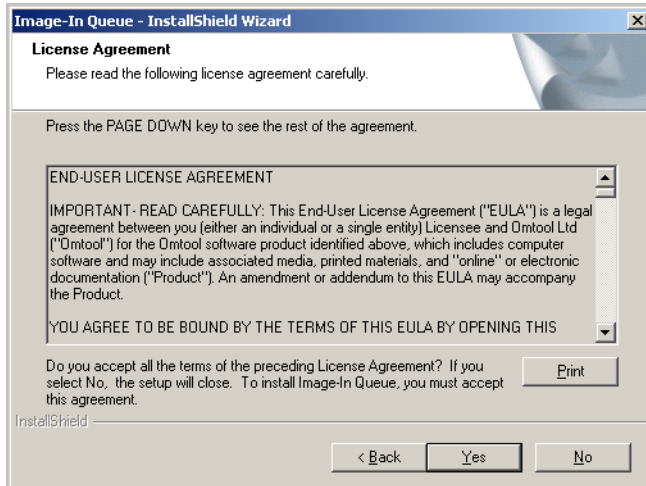
4   Read the agreement carefully and if you agree to the terms, click **Yes**.

The **Choose Destination Folder** page opens. The default destination is **C:\Program Files\Omtool\Image-In Queue**.
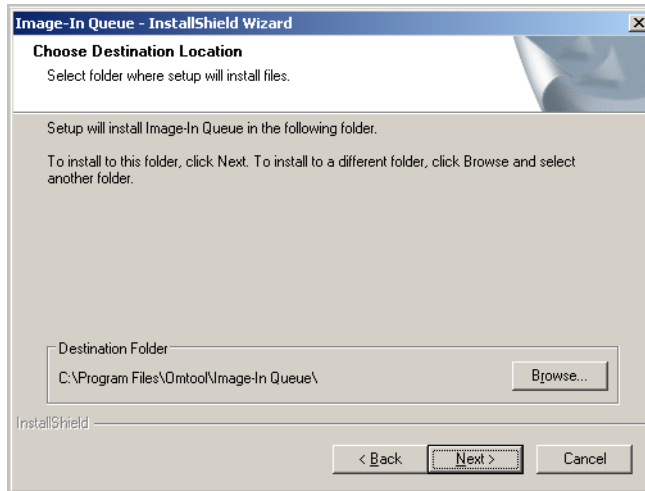
Note   On 64 bit systems, the default destination folder is C:\Program Files (x86)\omtool\Image-In Queue.

5   Click **Next** if you want the default destination. The **Start Copying Files** page opens listing installation details you have supplied. If you want to install in a non-default location, click **Browse** and then select the desired location and then click **Next**.
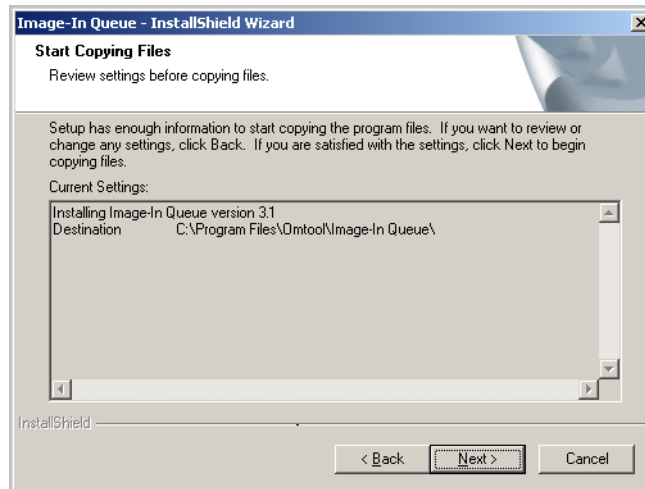
6 Click **Next** to begin the installation.
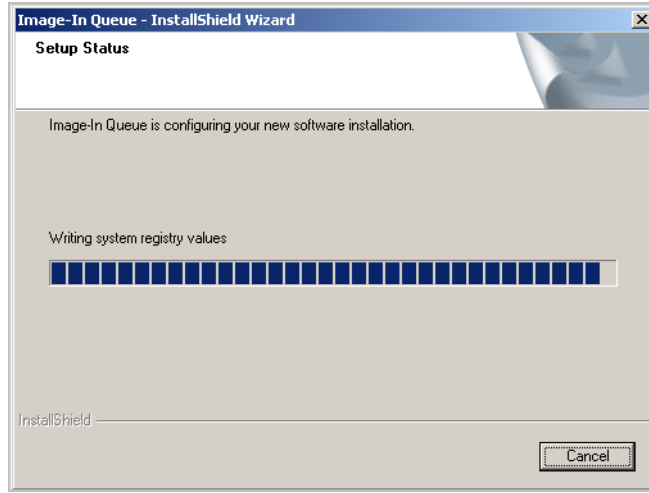
7 When installation is complete, you see the **InstallShield Wizard Complete** message.
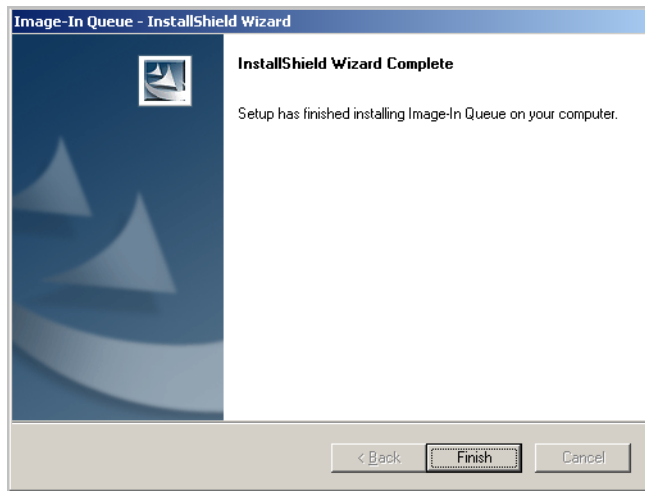
8 Click **Finish** to close the wizard.

Running Image-In Queue Setup in silent mode

To run Image-In Queue setup in silent mode:

1 Log in to the system where you are installing Image-In Queue 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\Image-In Queue**.

> **Note** On 64 bit systems, the setup files are located in the C:\Program Files (x86)\omtool\Omtool Server\clients\Image-In Queue directory.

4   To install Image-In Queue in silent mode for the first time, record a response file:

     `setup.exe /r /v"/qn`

     This will display the UI and also install the application. It also creates `C:\Windows\setup.iss` file.

5   Copy the `setup.iss` file to the following location **C:\Program Files (x86)\omtool\Omtool Server\clients\Image-In Queue**.

Note   For 64 bit systems, the path is **C:\Program Files\omtool\Omtool Server\clients\Image-In Queue\setup.exe**

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6   To install Image-In Queue in another system, run: `setup.exe /s /v"/qn"`

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

7   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. For example, if the long path is C:\Program Files\Omtool\Image-In Queue, then the short path is C:\Progra~1(x86)\omtool\Image-~1.)

Note   Add (x86) after Program Files for 64-bit systems.

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`.

Verify that Image-In Queue is installed on the client by navigating to **…\Omtool\Image-In Queue** on the client and verifying that the Image-In Queue program files are installed.

Uninstalling Image-In Queue

To uninstall Image-In Queue:

1   Click **Start > Control Panel > Add or Remove Programs**.

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

3   Follow the prompts to remove the application.

To verify that Image-In Queue is removed from the client, browse the directory structure on the client and verify that **…\Omtool\Image-in Queue** has been removed. (The Omtool directory remains if other Omtool applications are installed on the client.)

Section 4: Post-Installation Operations

This section includes:

Connecting to Image-In Queue

To connect to the Image-In Queue Queue application:

1   Login to the system as a member of a Group with access rights to Image-In Queue.

> **Note**   When you launch Image-In Queue, it automatically pulls your Windows authentication information. If the authentication used does not have access permissions to a predefined Queue, you will not be able to login.
>
> The Omtool Server Administrator, when creating a queue, defines which Group has access to the Queue. In addition, the administrator also defines the types of permissions the Group has. In order to login to Image-In Queue and access your Queue, you must be a member of the defined Group which has access to a Queue.

2   Click **Start > All Programs > Omtool> Image-In Queue** to launch the application.

3   You are prompted to connect to an AccuRoute Server.
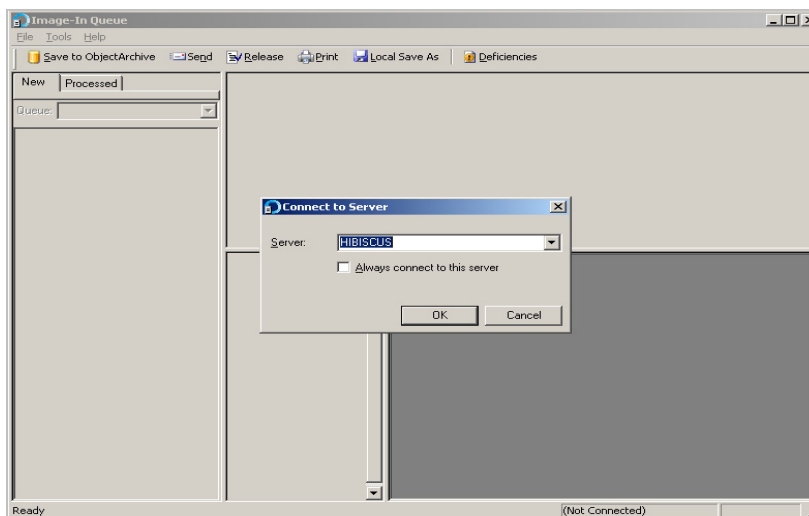
4   In the **Server** drop down, select the AccuRoute Server name and enter the IP address of the AccuRoute Server. Alternately, manually enter the name of the AccuRoute Server.

5   Click **OK**.

For instructions on how to use the Image-In Queue Client, consult the Image-In Queue online help.

Note about connecting to an AccuRoute Server installed on a Windows 2008 system

To connect to an AccuRoute Server installed on a Windows 2008 system, follow the instructions in Note about connecting to an AccuRoute Server installed on a Windows 2008 system (2-2).

If you are connecting to an AccuRoute Server running on a Windows 2003 system, check Image-In Queue fails to connect to AccuRoute Server installed on Windows 2003 system (6-2).

Section 5: Optional Configurations

This section includes:

Configuring the Property Expression feature

The Property Expressions feature allows jobs to be processed based on the value of a property. For example, based on a property expression, the Administrator can configure jobs to be released from Image-In Queue.

To configure Property Expression for Image-In Queue Queue:

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

2   In the console tree, expand the Omtool Server.

3   Go to the **Queues** node and select the queue to configure. Open the properties page for the Queue.

4   Open the **WorkFlow** tab.

5   Add a workflow where the job will be automatically routed if a property (say for example client value) is equal to a specific value (for example, say 1111).

> *Important*   You must use double quotes not single quotes when configuring the property value, for
> example: *\\prDMSCustomFields(prDMSFieldName=client)\prDMSFieldValue="1111"

6   Save the workflow.

Now when a user selects a job and applied the value of "1111" to the job, it is automatically routed.

Creating a routing rule for routing to multiple queues for the "Rescan" deficiency

To configure a routing rule for routing to multiple queues for the Rescan deficiency:

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

2   In the console tree, expand the Omtool Server.

3   Go to the **Rules > Outbound > New**.

4   In the Specify the Criteria for this Rule box, click Add. From the Add Rule Criteria page, select Destination is an Image-In Queue, click **Next**.

5   In the **Items to Match**, verify the option is selected. In the text box add the Queue email address, for example: queue@yourcompany.com and click **Add** then click **Finish**.

6   Click Next. In the **Specify the Actions for this Rule** page, click **Add**. The Add Actions page opens.

7   Select Route to Image-In Queue option and click Next. The Route to Image-In Queue page opens.

8   In the Select an Image-In Queue settings section, check the Specific Queue option. From the drop-down menu, select the Queue email address: queue@yourcompany.com.

9   Click **Finish**, then **Next**, **Next** and **Finish** to create the rule.

Modifying a notification template to include user-entered values

You can configure the notification messages to include user entered values by configuring the omNotification-IIQ.omtpl template.

To modify the omNotification-IIQ.omtpl:

1   Navigate to the following directory on the Omtool server: **\\Program Files\omtool\Omtool Server\Languages\ENU\Templates**

2   Locate the omNotification-IIQ.omtpl template.

3   Make a copy of the .OMTPL file and keep it as backup.

4   Open the file using WordPad.

5   Enter template variables as needed. For example, to include template variables so that the information you enter in the Name, Company and Comments text box in the Routing Transaction Description text box are not substituted in the notification message, enter the information in the omNotification-IIQ.omtpl template as shown below:

Name:%SENDER_CUSTOM1%

Company:%SENDER_CUSTOM2%

Comments:%SENDER_CUSTOM3%

6   Save the file.

7   Verify that the file has the .OMPTL extension.

The value set by the IIQ operator will replace the matching value found in the %<VALUE>%s, and will remove percents as well.

Section 6: Troubleshooting

This section includes:

Manual Release option is not working in IIQ

Problem:

Even after Allow documents to be released and Allow incomplete documents to be released options are enabled for an IIQ group, documents released by IIQ operator are not archived to OA database. Instead the documents are held in New Items folder.

Solution:

For the Release feature to work, the Queue workflow rules must be configured by the Omtool Server Administrator where the **Manual Release** rule should have the highest precedence. If you are not setup with the required Queue workflow configuration, you will not be able to use this feature.

To set up Manual Release Queue workflow rule, see Creating the Queue workflow rules (A-6).

When merging documents, IIQ creates a folder called (No value) and is putting the merged documents there

Problem:

When merging multiple documents, they are being put in a folder called (No value).

Solution:

This is happening because **prFolderID** is not set as a required property. IIQ only merges required properties, so the newly merged item is stripped of the original folderID set in the original documents.

To correct this issue,

- On the AccuRoute Server, open the Queue properties page
- go to the Properties tab

- add the FolderID message property at the top list for required properties

Image-In Queue fails to connect to AccuRoute Server installed on Windows 2003 system

Problem:

Image-In Queue cannot connect to AccuRoute Server installed on a Windows 2003 system.

Solution:

This may be happening because Windows firewall on the Windows 2003 system is turned on.

You can turn off the firewall and test whether the Image-In Queue application is connecting to the AccuRoute Server. The other workaround to this problem is to add port 135 to the "Exception list" by keeping the Firewall "ON". Here are the steps:

To add port 135 to Exceptions list on Windows 2003 server:

1 Go to the **Exceptions** tab of the Windows Firewall sheet.

2 Click **Add Port**.

3 Enter a name as appropriate, for example, DCOM RPC.

4 Enter port number of 135.

5 Verify **TCP** is selected.

6 Press **OK** to save your changes.

Now you can connect to the AccuRoute Server without any issues.

Changing the mail type for Image-In Queue application

Problem:

To change the mail type, modify the omImageInQueue.xml file in the **C:\Program Files\omtool\Image-In Queue\Bin** folder. However, relaunching Image-In Queue results in this error:

> Failed to initialize email system. (0x80004005) Unspecified error

Solution:

To change the mail type, you need to change the mail type of the AccuRoute user.

1 Navigate to **C:\Documents and Settings\<Logged in User's Folder>\Application Data\Omtool\Image-In Queue** folder.

2 Open the omImageInQueue.xml file located in the Image-In Queue folder.

3 Search for the <prMailType></prMailType> tag.

4 Modify the value as necessary. For example, to use Lotus Notes, add the value `lotusnotes`, to use Outlook, add the value `Outlook`.

5 Save your changes.

When modifying the Queue Properties Collections tab, AccuRoute Server cache must be refreshed to reflect changes

When you make any modifications to the **Collections** tab of **Queue Properties**, for the changes to be properly reflected in the Omtool Workflow Integration Application (OWIA), you need to manually refresh the cache on the AccuRoute Server.

Solution:

1 On the system where IIQ is installed, go to **C:\Program Files (x86)\Omtool\Image-In Queue\Bin**.

2 Right-click on `QueueWorkFlow.xml` and select **Edit**.

3 Change the **CacheInitializationData** from `1` to `0` and save the document.

4 Re-launch the OWIA using Image-In Connect, and select **Link to IIQ**.

Appendix: Configuring AccuRoute Server for Image-In Queue

The Omtool Server Administrator must configure the AccuRoute Server before the Image-In Queue operator can connect to Image-In Queue and use the application to process scanned documents. Each of the required configurations are separately explained in this section.

> **Note**   These configurations are not a part of installing Image-In Queue. However, without them, Image-In Queue will not work.

When configuring the AccuRoute Server for Image-In Queue, the following three licenses must be activated on the server:

- IIQ-40CLIENT for providing access to the server from the Image-In Queue Client
- IIQ-40WORKFLOW for enabling Queue node and enabling the IIQ component
- II-WFLOWX-40ADL for enabling Volume List node and Volume List connector

This section includes:

Enabling the IIQ component

Before you can use Image-In Queue, you must manually enable the IIQ component in Omtool Server Administrator using a valid license key. The IIQ license key is available for a separate fee. Contact Omtool Sales for information.

To enable the IIQ component:

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

2   In the console tree, expand the AccuRoute Server.

3   Right-click on the server name and select **Licensing**.

4   Click the **Automatically activate** button in the **Licensing** dialog.
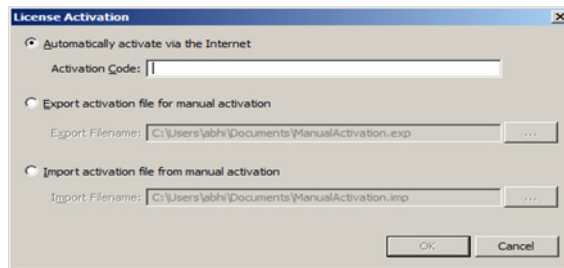
5   In the **License** text box, enter the valid license obtained from Omtool.

6   Click **OK** to enable the component.

Creating Queues

AccuRoute Server Queues are related to the use of the Image-In Queue Clients in processing scan jobs. The queue workflow is a series of destinations that a document makes while it is processed. This is managed within the Image-In Queue Client, but still gives users the option of adding specific data to the document to ensure that the correct values are associated with the document.

You can create multiple Queues to divide a document workflow into logical groups. A Queue can have its own column headings and separate editable fields. These fields must be selected on the basis of the Queue and the destination for the documents in the Queue.

To create a queue:

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

2   In the console tree, expand the AccuRoute Server.

3   Right-click **Queues** and select **New > Queue**.

The **Properties for Queue** dialog opens.
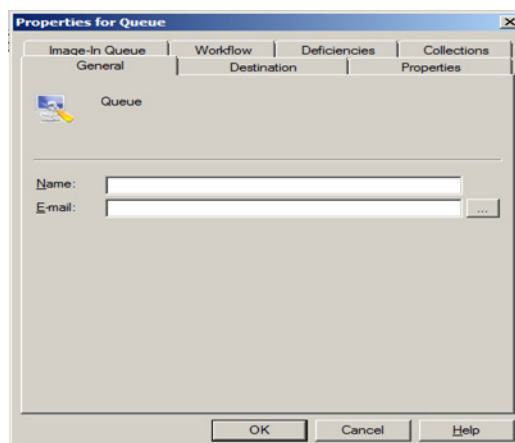
4   At the **Name** field on the **General** page, enter a descriptive name for the Queue.

5 In the **E-mail** field, enter an email address for the person who will manage the queue.

6 Click the **Destination** tab to open the **Destination** page.
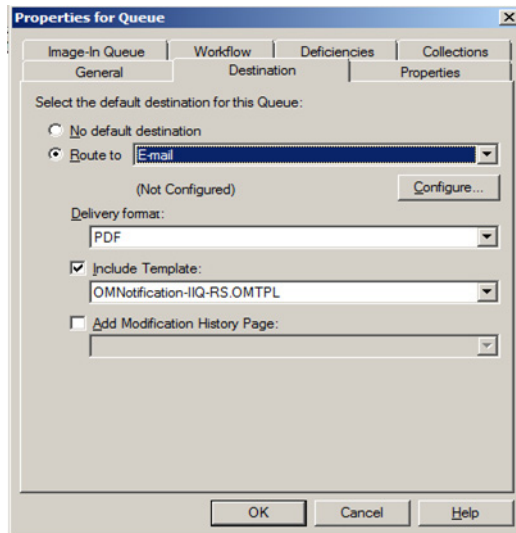
a Select the **Route to** option and from the drop-down list, select the destination. The destination can be Object Archive, a DMS (if the connector for the DMS is installed), Embedded Directive or an email.

b Click **Configure** and configure as necessary.

c At the **Delivery Format** drop-down, **PDF** appears as the default value. **Delivery Format** cannot be left blank.

7 Click the **Properties** tab to open the **Properties** page.

a In the **Specify the required properties for this queue** section, click **Add**. The **Required Meta-Data Properties** page opens.

b From the **Property** drop-down, select a property.
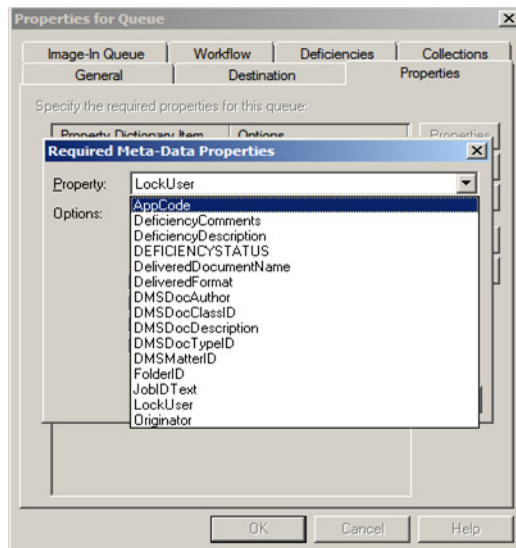
c   Verify that the **Include in Meta-Data Deficiencies** option is checked if you want AccuRoute Web Client users to see the meta-data properties from the Web Client.

d   Verify that the **Include in client Copy and Paste operations** is checked if you want the Image-In Queue operator to use copy paste functionality when editing data.
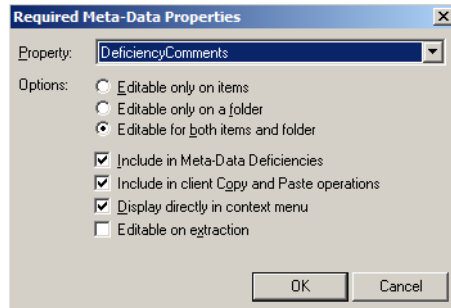
e   Click **OK** to close the **Required Meta-Data Properties** page. The property is now listed in the **Specify the required properties for this queue** section.

f   In the **Specify the properties to display in listings for this queue** section, click **Add** to open the **Select Property Dictionary Field** page.

g   Select properties to display in the Image-In Queue Client.
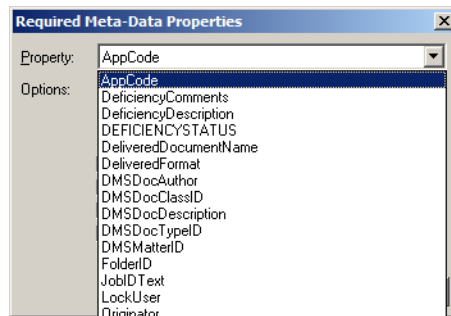

h   Click **OK**. The property is now listed in the **Specify the required properties for this queue** section.

8   Click the **Image-In Queue** tab to open the **Image-In Queue** page.

9   To customize any folder name, click the **Collections** tab, select the folder from **Specify the collections to display list** and click the **Properties** option.
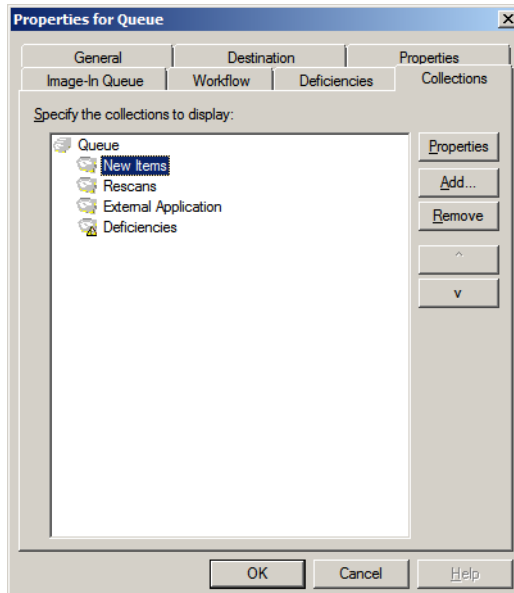
10   In the **Name** text box, enter the customized name to display and click **OK**.
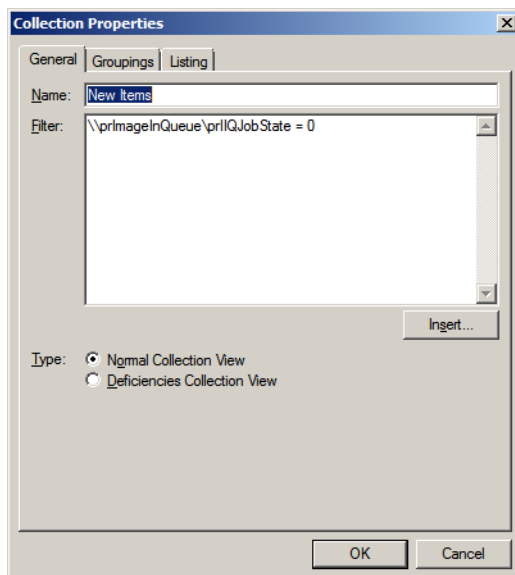
11   Click the **Workflow** tab to open the **Workflow** page.

12   Create workflow rules following instructions in the Creating the Queue workflow rules section.

13   Click the **Deficiencies** tab to open the **Deficiencies** page. All default deficiency types (Approval, Data & Approval Required, Data Required, e-Signature and Rescan) are selected by default.

14   De-select (by un-checking the check box next to the deficiency) or remove deficiencies as needed (select the deficiency and click **Remove**).

15 To add a new/custom deficiency, click **Add**. The **Deficiency Properties** page opens.

16 In the **Name** text box, enter the name of the deficiency, in the **Code** text box, enter the internal code matching the deficiency, and from the **Type** drop-down menu, select the type of deficiency.

17 Click **OK** to save the new deficiency and close the **Deficiency Properties** page.

18 Click **OK** in the **Queue Properties** page to create the Queue.

Creating the Queue workflow rules

Here is a sample set of workflow rule. Create your own queue workflows following the instructions below.
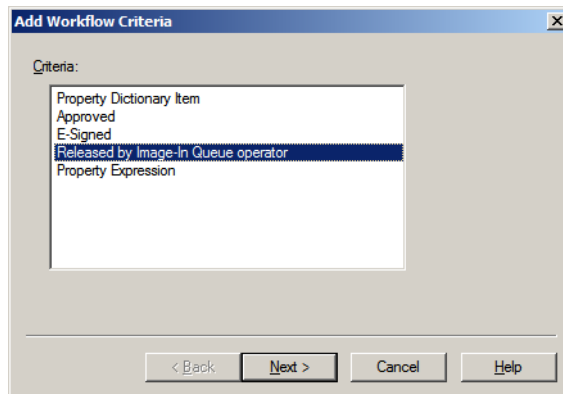
To create a queue workflow rule:

1 Click **Add** to add a workflow. The **Queue Workflow Rules Properties** page opens.

2 In the **Description** text box, enter **Manual Release**.

3 Click **Add** in the **Criteria** section to open the **Add Workflow Criteria** page.

4 Select **Released by Image-In Queue Operator**.

5 Click **Next**.

6 For **The job** option, select **is** and for the **Released By** option verify **Anyone** is selected.

7 Click **Finish** to close the **Add Workflow Criteria** page.

8 Click **Configure** to open the **Configure Workflow Action** page.

9 In the **Action** area, select **Automatically Route**. Selecting this option will route the documents to the Queue's default destination.
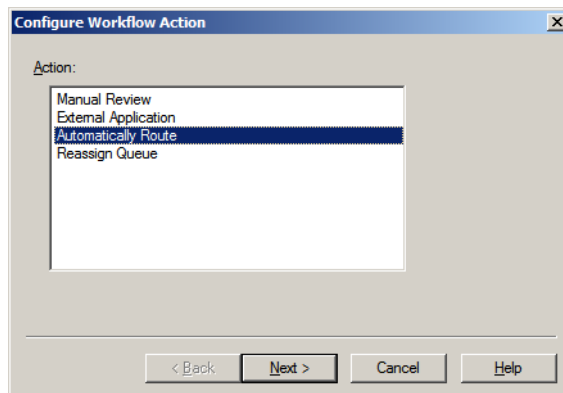
10 Click **Next** and then click **Finish**. Configuring the rule is complete.

11 Click **OK** to close the **Queue Workflow Rules Properties** page.

Configuring the rule is complete.

12   Click **OK** to go back to the **Queue Properties** page.

Configuring routing of documents from Image-In Queue to ObjectArchive

This section includes:

Designating default destination as ObjectArchive (A-8)

Creating queue workflow rule where documents are routed to default destination: (A-9)

Creating the AccuRoute Connector for DMS ObjectArchive (A-9)

In this release, to route documents from Image-In Queue to ObjectArchive set up Queue Workflow rules where the destination for the queue is ObjectArchive.

If the Image-In Queue operator tries to right-click and save a document to a DMS where the DMS is ObjectArchive, the operator will get the following error:

Failed to initialize DMS provider. (0x80040154) Class not registered
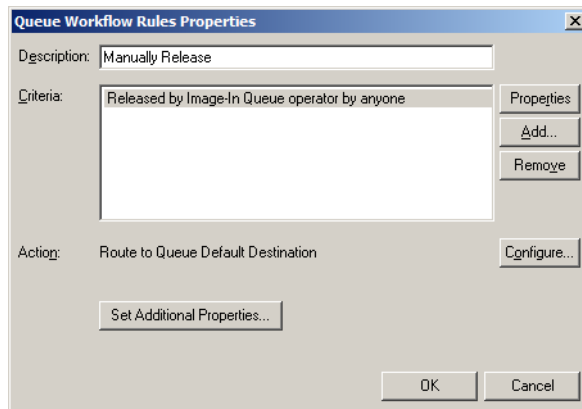
Designating default destination as ObjectArchive

To designate the default destination of your queue as ObjectArchive:

1   Click **Destination** to open the **Destination** page.

2   Select **Route to** option and from the drop-down list, select ObjectArchive via ObjectArchive (ObjectArchive).

The AccuRoute Connector for ObjectArchive must be configured before the ObjectArchive option will appear in your list. For configuration instructions, see Creating the AccuRoute Connector for DMS ObjectArchive (A-9).

3   Click **Configure** and configure as necessary.

4 At the **Delivery Format** drop-down, **PDF** appears as the default value. **Delivery Format** cannot be left blank.
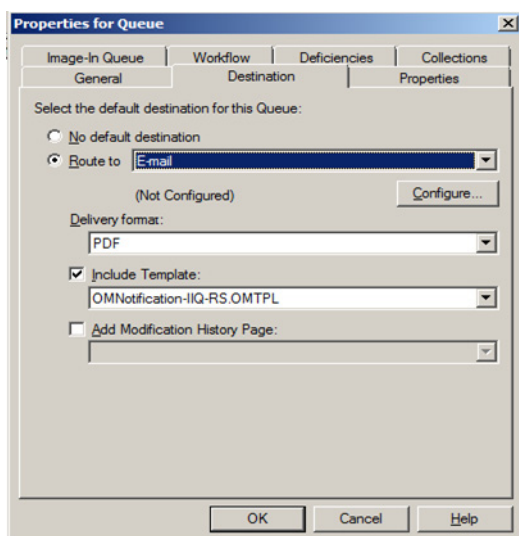
5 Click **OK** to save your changes.

Creating queue workflow rule where documents are routed to default destination:

For instructions, see [Creating the Queue workflow rules](#) (A-6).

Creating the AccuRoute Connector for DMS ObjectArchive

To create the AccuRoute Connector for DMS ObjectArchive:

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

2 In the console tree, expand the AccuRoute Server.

3 Right-click on **Connectors** and hover the cursor over the **New AccuRoute server connector for** option and click **Volume List**.

4 On the **Server Address** page, click **Next**.

5 On the **Display Name** page, click **Next**.

6 The **Volume List** page opens with a pre-defined Volume List.

7 Select the Volume List where the documents will be stored and click the **Next** option.

8 Click **Finish**.

DMS configuration is now complete and the AccuRoute Connector for DMS ObjectArchive is now listed in the Connectors details pane. Users can now use this connector to route documents for archiving.

Configuring groups

This section includes:

Creating a group

The group Default is created automatically when you install AccuRoute v5.0. Members of this group include all users within the Domain Users group in the Active Directory. Use the instructions below to create your group with access to Queues you have created.

To create a Group:

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

2   In the console tree, expand the AccuRoute Server.

3   Expand **Configuration** and select **Groups**.

4   Right-click on **Groups** and select **New > Group** from the drop-down options.

5   In the **Name** text box, enter a name for the group.

6   In the **Description** text box, enter a brief description of the group.

7   Click **OK**. The group is created and appears in the **Details** pane.

Configuring Queue Access

To give the Queue Access to Volume Lists:

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

2   In the console tree, expand the AccuRoute Server.

3   Right-click **Configuration** and select **Groups** from the drop-down menu.

4   Double-click the Group of interest to open the **Properties** page.

5   Click the **Queue Access** tab to open the **Queue Access** properties.

6   Check the box beside the **Enable members of this group to access the following queues** option.

7   Select the Queue from the list displayed.
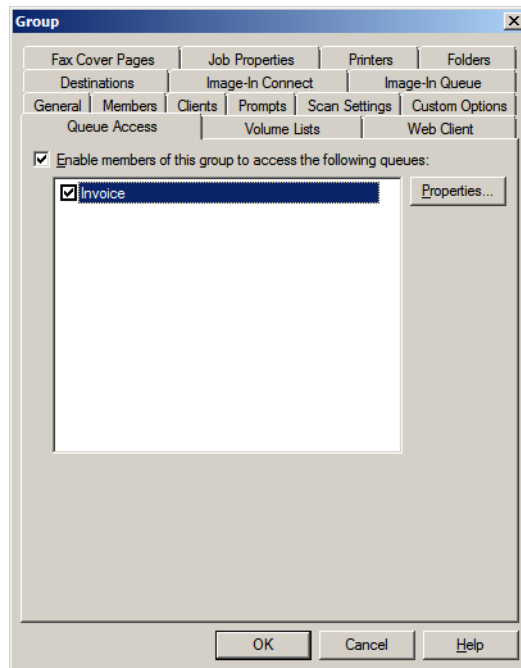
8   Click **OK** to save your changes.

Adding Image-In Queue permissions to a group

Add the Image-In Queue permission to the group of interest following the instructions below.

To configure a group:

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

2   In the console tree, expand the AccuRoute Server.

3   Right-click **Configuration** and select **Groups** from the drop-down menu.

4   Double-click the Group of interest to open the **Properties** page.

5   Click the **Image-In Queue** tab to open **Image-In Queue Properties**.

6   Check the box beside the **Enable members of this group as Image-In Queue Operators** option.

7   Next, navigate to **Queue Access** and check the box beside **Enable members of this group to access the following queues**.

8   Select the queue from the list and click the **Properties** option.

9   Select the boxes beside **Allow incomplete documents to be released** and **Allow workflow locks to be manually released**.

> **Note**   When a user logs into Image-In Queue as a member of a group, the user has all the permissions you select in this step.

The table below lists all permissions with a brief explanation of each one.

Table A-1: **List of permissions that can be allowed for an Image-In Queue Group**

Permission	Explanation
Allow data to be edited	Will allow editing of required document metadata. For example, if a metadata field requires validation, the user can fill in the required value for validation.
Allow document extraction	Will allow the Image-In Queue operator to extract single pages from a multi-paged document. For example: This permission can be used for a multi-paged document where each page needs to be updated with a unique metadata value.
Allow document to be annotated	Will allow the Image-In Queue operator to annotate a document. This is useful if the user needs to add text to the document or hide a portion of the text (redact) from the document.
Allow documents to be deleted	Will allow a user group to delete processed documents. Documents must be moved into the processed queue before they can be deleted.
Allow documents to be moved to processed	Will allow the Image-In Queue operator to send a document to the Successful queue without going through the workflow that was configured. For example: This permission is applicable when a document needs to be moved to the successful queue without mentioning any metadata value.
Allow documents to be reassigned to any queue	Will allow the Image-In Queue operator to reassign a document to a different queue than the current one. For example: The invoice that is sent to processing in Queue A can be reassigned to Queue B.
Allow documents to be released	Will allow the Image-In Queue operator to release a document. Releasing a document is similar to routing it to a specified default destination, for example, the ObjectArchive database. A document can be released only after all the required properties have been validated and if the document has a specified destination. Also, documents that are in deficiency cannot be released. However, if the Allow incomplete documents to be released option is checked, a document can be released without validating any required property. If no default destination is specified, the Release option in Image-In Queue Client will be disabled.
Allow documents to be routed	Will allow the Image-In Queue operator to route a document to e-mail, fax or printer destinations.

Table A-1: **List of permissions that can be allowed for an Image-In Queue Group**

| Permission	Explanation
Allow documents to be saved to a DMS	Will allow Image-In Queue operator to route a document to a pre-defined document management system.
Allow documents to be saved locally	Will allow the document to be saved to the local system or to the network.
Allow incomplete documents to be released	Will allow incomplete documents to move to the ObjectArchive database.
Allow management of deficiencies	Will allow mapping to and management of deficiency properties. When the Image-In Queue operator assigns a deficiency to a document, he has to provide the email of the user who will address the deficiency. (This user whose email is assigned must be a member of the group the queue is assigned to).
Allow printing of documents	Will allow documents to be printed to a network printer.
Allow workflow locks to be manually released	Will allow the Image-In Queue operator to manually release documents in a workflow.
Automatically select first document when a folder is selected	Will select the first document in all the Image-In Queue Client folders by default.
Do not automatically lock selected items	Will allow multiple users to select the same document in the Image In Queue client.
Operator must view all document pages before completing	Option is not implemented in this release.

10 Click **OK** to save your selection.

Configuring access to Volume Lists

To give the group access to Volume Lists:

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

2 In the console tree, expand the AccuRoute Server.

3 Right-click **Configuration** and select **Groups** from the drop-down menu.

4 Double-click the Group of interest to open the **Properties** page.

5 Click the **Volume Lists** tab to open the **Volume Lists** properties.

6 Check the box beside the **Enable searching the following Volume Lists for members of this Group** option.

7   Check the Volume Lists **Active** and any other configured Volume List as necessary.
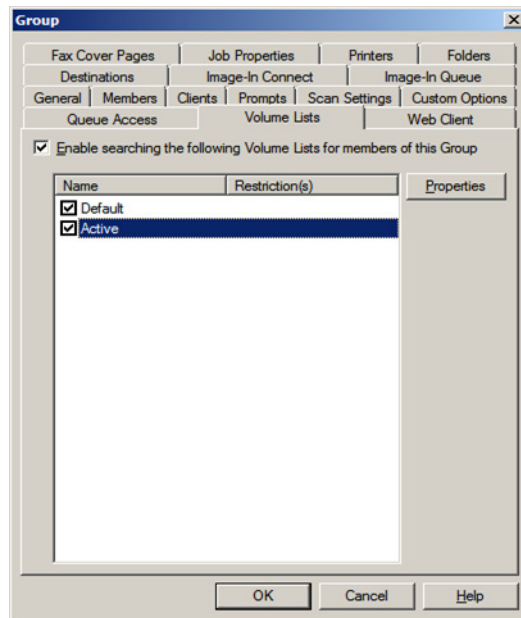
8   Click **OK** to save your changes.

Configuring the Volume List Node

The Volume List appears on the AccuRoute v5.0 Server once you have applied a license provided by Omtool Sales. After applying the license, a Volume List node appears on the server when an Active Volume List is created by default.

Updating the Active Volume List

The **Active Volume List** is created when you install AccuRoute v5.0. You must update the Active Volume List with properties to index.

To update the Active Volume List:

1   Double-click **Active** and open the **Properties** page.

2   Click the **Indexing** tab to open the **Indexing** page.

3   In the **Properties to Index** section, click **New** to open the **Index Properties** page.

4   Select **Add** and choose the message properties that you want indexed.

5   Click **OK** to close the **Index Properties** page.

6   Click **OK** to close the **Active** page.

Optional configurations

The instructions in this section pertain to Image-In Queue customizations. These configurations are not required.

Configuring folder grouping

Folder groupings make Image-In Queue group the items into folders that match a certain property. For example, a company could group their documents by each item's clientID. In this case, instead of all New Items being under New Items\Unassigned, the items could be grouped as follows:

New Items

77884

44342

11222

Where **77884** through **11222** are clientIDs.

Now all items that have a clientID of **77884** appear in the **Details** pane on the right item when the 77884 folder is selected.

To create a folder grouping:

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

2   In the console tree, expand the Omtool Server.

3   Click **Queues**. All defined queues are listed in the **Details** pane.

4   Double-click the Queue to open the **Properties** page.

5   Click the **Image-In Queue** tab.

6   In the **Folder Grouping** section, click **Add**. The **Select Property Dictionary Field** page opens.

7   Select property items that should make up the new folder. You can select more than one property item.

All messages are now sorted according to the property you selected. For example, in the figure below, all the messages are sorted by the client value. Messages with same client values are grouped into the same folder.
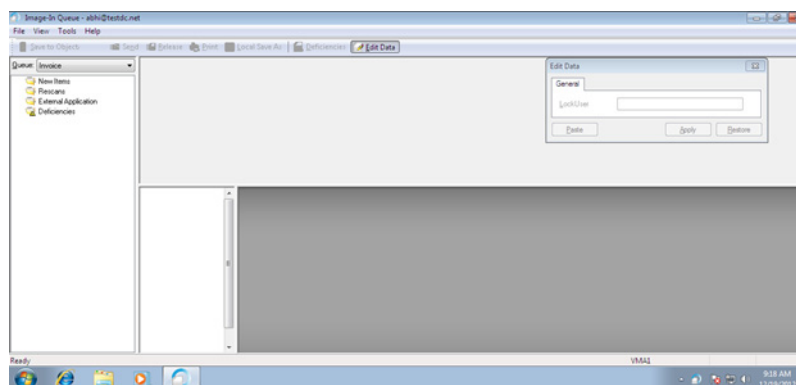
Customizing a folder name

To customize a folder name:

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

2   In the console tree, expand the Omtool Server.

3   Click **Queues**. All defined queues appear in the **Details** pane.

4   Double-click the Queue to open the **Properties** page.

5   Click the **Image-In-Queue** tab.

6   In the **Folder Display Names** for this queue section, select the **Folder state** to customize.

7   Click the Folder name and click **Change**. The folder name change page opens.

8   In the **Display Name** text box, enter the new name.

9   Click **OK**.

10 Click **OK** again to save your changes.