AccuRoute® Extensions for Microsoft® SharePoint® Installation Guide

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- **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

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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
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Section 1: Overview

Features

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

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

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

- **Create Scan Reservation** - Create a Microsoft SharePoint placeholder. When a Personal Distribution is selected from the device, the document scans to that placeholder.

- **Open in AccuRoute Web Client** - Create a message from within your Microsoft SharePoint document library. The AccuRoute Web Client opens the New Message page showing the message you created. Attach electronic documents to the message and route the message to the AccuRoute Server for processing. The AccuRoute Server uses the instructions in the message to route the documents to the Microsoft SharePoint repository where they are stored at the appropriate location.

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

Requirements

AccuRoute server

The system where you install AccuRoute Extensions for Microsoft SharePoint must be running:

- AccuRoute v4.0

Microsoft Sharepoint

AccuRoute Extensions for Microsoft SharePoint can be installed on any of the following supported Microsoft SharePoint environments:

- Microsoft SharePoint 2007 32-bit server on Windows 2003 32-bit environment
- Microsoft SharePoint 2007 64-bit server on Windows 2003 64-bit environment
- Microsoft SharePoint 2007 64-bit server on Windows 2008 R2 64-bit environment
- Microsoft SharePoint 2010 64-bit server on Windows 2008 R2 64-bit environment

Section 2: Installation

Installation involves two procedures, as described in this section:

Installing AccuRoute for SharePoint client on the Microsoft SharePoint server

1   Log in to the Microsoft SharePoint Server system using an account that belongs to the Administrators group.

2   Navigate to the AccuRoute server system and find the following directory:

`\\Omtool\Omtool Server\Clients\Extensions for MS SharePoint`

3   Run `Setup.exe`. The setup configures your system and opens the **InstallShield** wizard showing the **Welcome** message.

4   Click **Next**. The **Specify URLs** page opens.

Enter the AccuRoute Client URL. This is usually:

`http://AccuRoute Server Name}/WebClient`

Enter the specific SharePoint site URL or sub-site URL. For example:

`http://vmsharepoint201/sales`

5   Click **Next**. The **Ready to Install the Program** page opens.

6   Click **Install** to begin the installation. When installation is complete, you will see the **Installation Completed** message.

7   Click **Finish** to close the **InstallShield** wizard.

Entering a license for AccuRoute Extensions for Microsoft SharePoint

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

You can activate the AccuRoute Extensions for Microsoft SharePoint license in one of two ways:

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

Automatic license activation

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

1 If the AccuRoute Server Administrator is not already open, click **Start > All Programs > Omtool > AccuRoute Server Administrator**.

2 Expand the tree view and select the server name.

3 Right-click and select the **Licensing** option**.** The **Licensing** page is displayed.

4 Click the **Activate License...** button. The **License Activation** page is displayed.

5 Select the **Automatically activate via the Internet** option.

6 Enter your license activation code in the **Activation Code** text field.

7 Click **OK**. The server is updated with your license.

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

Manual license activation

Have available a copy of the activation code.

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

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

2 Expand the tree view and select the server name.

3 Right-click and select the **Licensing** option**.** The **Licensing** page is displayed.

4 Click the **Activate License...** button. The **License Activation** page is displayed.

5   Select the **Export activation file for manual activation** option.

6   Create an Export license file:

    a   Browse to a location where you want to save the license file. By default, the file is an Export file named `ManualActivation.exp`. After specifying the file name and location, click **Save**.

    b   The path will appear in the **Export Filename** field on the **License Activation** page. Click **OK**.

7   From a system with internet access, launch the web browser and go to:

    https://license.omtool.com/accuroute

    The **Manual Licensing Portal** page opens.

Manual Licensing Portal

Enter your activation code and select the Exported Activation File made using the Server Administrator.

Activation Code:	
	○ Activate License ○ Deactitvate License
Exported Activation File:	Browse...
	NEXT ▸

8   Enter your license activation code in the **Activation Code** text field.

9   Be sure the **Activate License** option is selected (the default).

10   Click the **Browse** button to select the `ManualActivation.exp` file created in Step 6. With the file name selected (highlighted), click **Open**.

11   Verify that the license information is entered correctly on the **Manual Licensing Portal** page.

12 Click **NEXT** and the **Activation Successful** message is displayed.
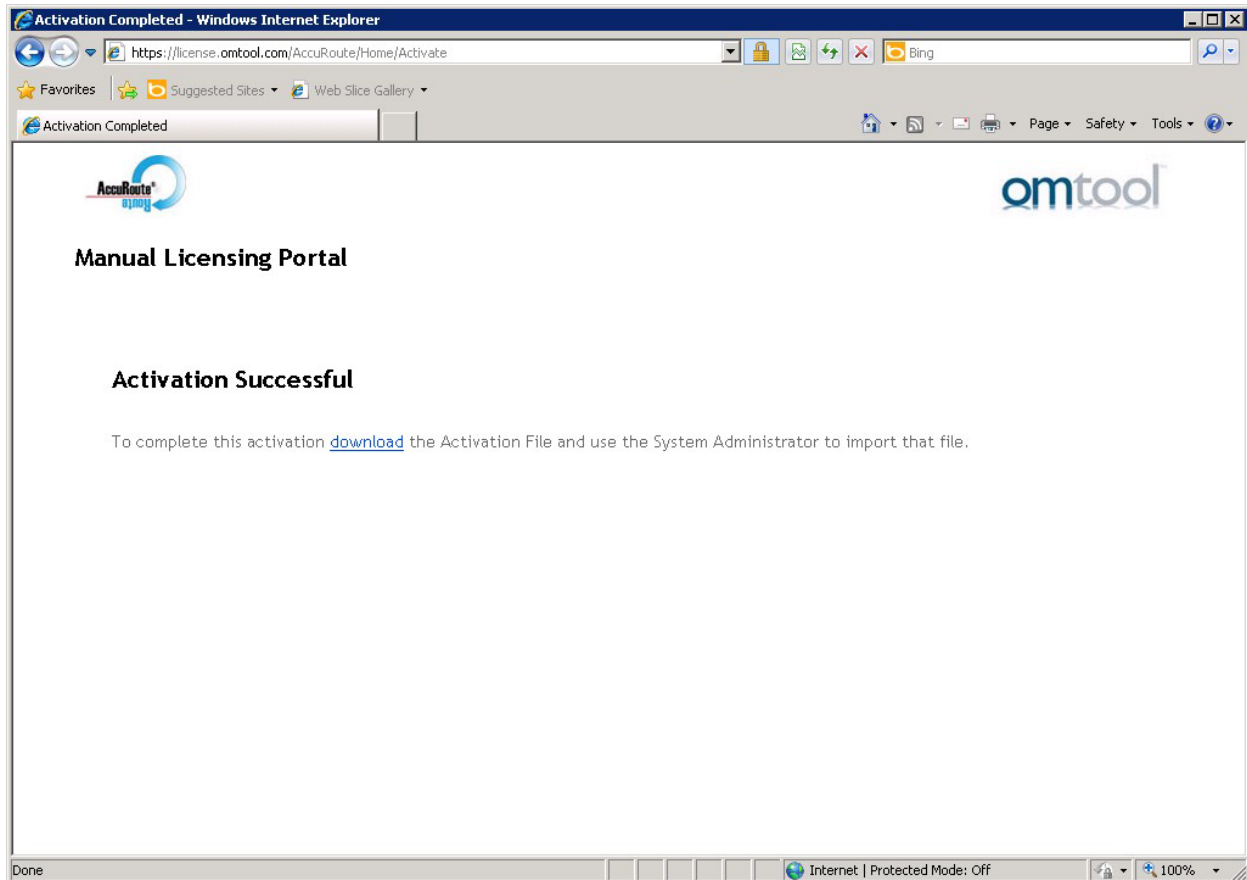
13 To complete the activation, click **Download**. The **File Download** page is displayed.

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

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

16 Click **Close**.

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

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

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

19 Browse to the saved `ManaulActivation.imp` file. Select the file and click **Open**.

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

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

Section 3: Configuration

This section includes procedures for:

Disabling the pop-up blocker in Internet Explorer

This required configuration will allow AccuRoute to access the SharePoint dialog. This procedure needs to be applied to each user's system.

1 Open Internet Explorer v8.0 / 7.0.

2 Select **Tools** from the menu bar.

3 Select the **Turn Off Pop-Up Blocker** option from the **Pop-Up Blocker** node.

Configuring the AccuRoute connector for Microsoft SharePoint

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

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

2 Right-click on **Connectors** and select **New AccuRoute connector for > SharePoint**. The **Server Address** page opens.

3 Select the Server Address option:

▸ **Run on the Message Server**

▸ **Remote Server** and enter the server address in the text box.

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

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

6 Click **Next**. A message indicates that the connector is running on the server.

7   Click **Finish**. The **DMS Configuration** page opens.

8   In the **SharePoint Location** text box, enter the location of the Microsoft SharePoint document library (for example, `http://server/site/document_library`).

9   Select the user who will connect:

‣   **Connect using current user**

‣   **Connect using this user** and enter the user name and password.

10 Click **Finish** to complete the configuration.

Setting anonymous authentication for UploadFile.aspx

This required configuration is done from the AccuRoute server where the End User Client is installed.

1   Go to the server system running the AccuRoute Server.

2   Open Internet Information Manager (IIS) 7.

3   Go to **Sites > Default Web Site > WebClient**.

4   Right-click on **OmtoolARWeb** and select the **Switch To Content View** option.

5   Select the **UploadFile.aspx** file and select **Switch to Features View** in the **Actions** pane.

6   Select **Authentication** in **Feature View** under **IIS**.

7   Select **Open Feature** in **Actions**.

8   Disable all except for **Anonymous Authentication**.

Configuring full control permissions for members of the group

This can be run from any system that is logged in with SharePoint Administrator credentials.

1   Launch the SharePoint site in Internet Explorer.

2   Click the **Site Actions** drop-down and select the **Site Settings** option.

3   Select the **People And Groups** option in the **Users and Permissions** column.

4   Select the **Home Owners** option in the **Groups** section.

5   Click on **New** and select the **Add Users** option.

6   In the **Under User/Groups** field, add users and check for the required members.

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

Full Control permissions are available to the selected members of the group.

Setting PDF documents to append date/time stamp for unique file name

By default, Routing Sheets should be set as single use, to avoid documents being overwritten. In some environments where PDF is used as the final format, the configuration.xml file can be modified to append a date/time stamp to the imported document creating a unique file name that will result in a new file added to the SharePoint.

1   On the SharePoint server, find the Configuration.xml and open it in Notepad:

    `C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12|14\TEMPLATE\FEATURES\MessageServer`

2   Locate the `<Recipient Destination>` tag of the configuration.xml file and REMOVE the following:

    `<prDMSDocumentUpdateOptions>1</prDMSDocumentUpdateOptions>`

3   Find the `<Recipient>` tag of the configuration.xml file and add the following:

    `<prDMSDocumentUpdateOptions>4</prDMSDocumentUpdateOptions>`

    The values equal:

    4 = create new document

    1 = overwrite document

    Note   Only documents that are PDF final formats can have the date and time appended to the file name.