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# AccuRoute<sup>®</sup> Connector for FTI<sup>®</sup> Ringtail<sup>®</sup> Installation and Integration Guide

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**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>

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# Section I: Introduction

This guide contains instructions on deploying the Litigation Support connector for Ringtail. It is written for system administrators with knowledge of the Omtool server.

This section includes:

[Litigation Support connector for Ringtail](#) (I-1)

[Release notes](#) (I-1)

[Related AccuRoute 4.0 documentation](#) (I-2)

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## Litigation Support connector for Ringtail

The Litigation Support connector works with Litigation Support software such as Ringtail to facilitate importing documents to the Litigation Support application.

Users can profile documents using AccuRoute Desktop by specifying Ringtail as a destination. The Litigation Support connector creates a single Microsoft Access database file that is associated with the appropriate case.

When the user creates and sends the End of Load File Routing Sheet, the `*_lss_export.mdb` (where `*` is replaced by the case name) file is copied to its final destination folder.

When the Compose is complete and the End of Load File Routing Sheet is sent, the working folder will be empty and the composed files will reside in the final folder. The final folder contains single page TIFF files for each page referenced by the load file. An OCR text file associated with the entire document might also exist, depending on the configuration of the Litigation Support connector.

---

## Release notes

### Enhancements

Litigation Support connector for Ringtail has been qualified with AccuRoute Desktop v4.0.

### Resolved issues

There are no new resolved issues in this release.

## Known issues

This release has the following known issue:

**I5705** - Validation error for 'Pages' table 'Parties' table in .mdb file of Ringtail v6.0.2. The workaround is to scan to a directory that has a virtual control file in it with this variable:

```
#OVERRIDE DESTINATIONDATA prRingtailVersion Ringtail 6.0.2
```

Alternately, you can send files directly to Ringtail from the AccuRoute Desktop client.

## Limitations

There are no limitations in this release.

---

## Related AccuRoute 4.0 documentation

For more information about AccuRoute Desktop and other AccuRoute products, refer to the [AccuRoute v4.0 documentation home page](#) to access:

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

# Section 2: Requirements

This section includes:

[Server requirements](#) (2-1)

[Client requirements](#) (2-5)

[Supported Ringtail versions](#) (2-5)

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## Server requirements

The server requirements are:

- AccuRoute v4.0

To check the version of the server, start the Omtool Server Administrator. Expand the items in the console tree if necessary. Right-click the server and select **Properties**.

- Valid Litigation Support connector license key

For information on how to purchase the license key, contact [omtool sales](#).

---

## Entering a license for the Litigation Support connector

**Note** The Litigation Support connector requires a license. For more information, contact Omtool Sales.

You can activate the Litigation Support connector license in one of two ways:

- Automatically when you enter an activation code and the AccuRoute server is on a system that has access to the internet.
- Manually if the AccuRoute 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 AccuRoute server has access to the internet. Have available a copy of the activation code.

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > 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 AccuRoute 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 > AccuRoute Server Administrator**.
- 2 Expand the tree view and select the server name.
- 3 Right-click and select the **Licensing** option. The **Licensing** page is displayed.
- 4 Click the **Activate License...** button. The **License Activation** page is displayed.
- 5 Select the **Export activation file for manual activation** option.
- 6 Create an Export license file:
  - a Browse to a location where you want to save the license file. By default, the file is an Export file named **ManualActivation.exp**. After specifying the file name and location, click **Save**.
  - b The path will appear in the **Export Filename** field on the **License Activation** page. Click **OK**.
- 7 From a system with internet access, launch the web browser and go to:  
<https://license.omtool.com/accuroute>



The **Manual Licensing Portal** page opens.



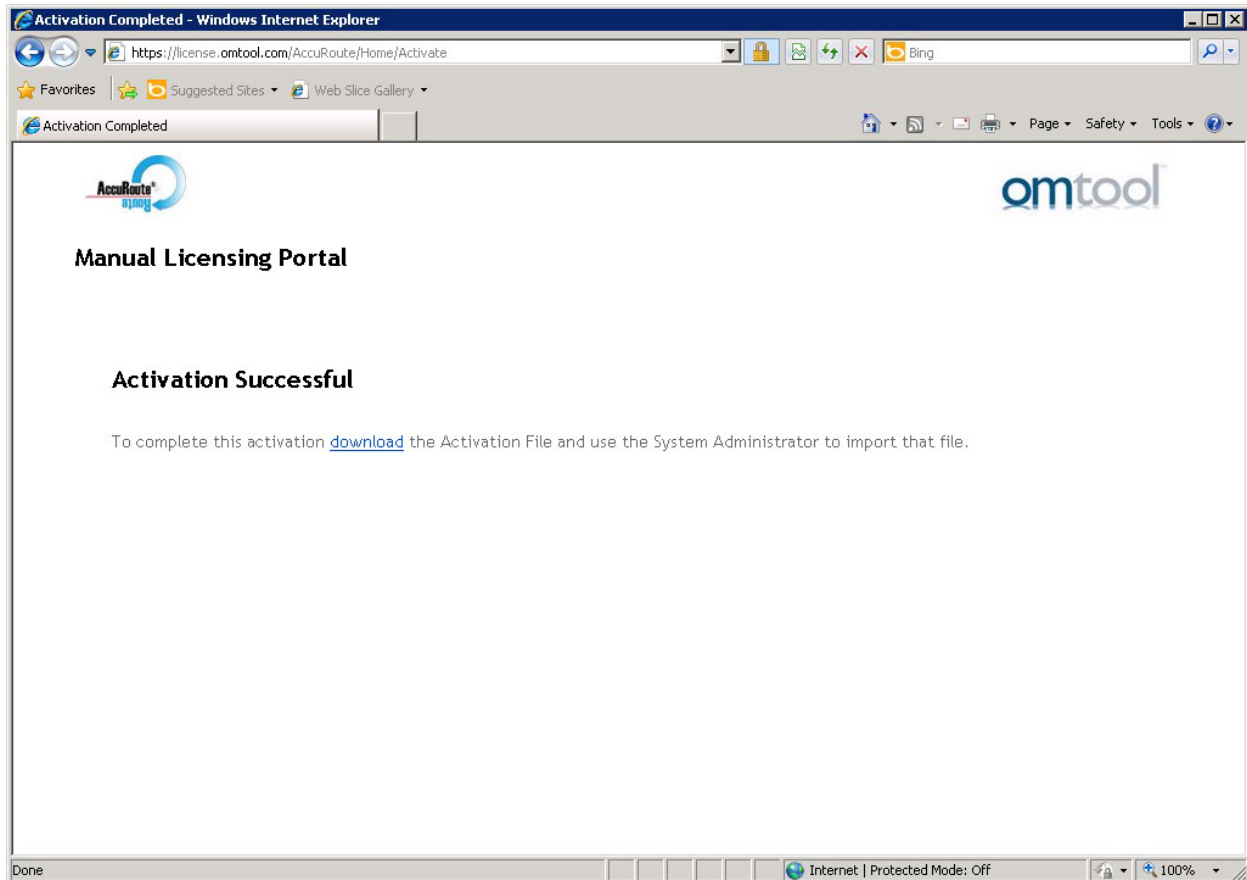
## Manual Licensing Portal

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

Activation Code:	<input type="text"/>
	<input checked="" type="radio"/> Activate License <input type="radio"/> Deactitvate License
Exported Activation File:	<input type="text"/> <input type="button" value="Browse..."/>
<input type="button" value="NEXT &gt;"/>	

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

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



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

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

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

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

## Client requirements

The client requirements are:

- AccuRoute Desktop v4.0

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## Supported Ringtail versions

Supported Ringtail versions:

- Ringtail CaseBook v6.0.2
- Ringtail CaseBook v2005



## Section 3: Installation

This section includes:

- [Downloading the Litigation Connector for AccuRoute v4.0](#) (3-1)
- [Special instructions for clustered servers](#) (3-1)
- [Applying the Litigation Connector for AccuRoute v4.0](#) (3-2)
- [Adding the Litigation Support connector to the AccuRoute server](#) (3-3)
- [Reinstalling AccuRoute Desktop on all client systems](#) (3-6)

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### Downloading the Litigation Connector for AccuRoute v4.0

The Litigation Connector for AccuRoute v4.0 is available for download for a separate fee. Contact [omtool sales](#) for information on how to purchase the connector.

**To download the Litigation Connector for AccuRoute v4.0:**

- 1 Open Internet Explorer browser and go to <http://www.omtool.com/support>.
- 2 Log in using the customer number provided to you by customer service when you purchased the connector.
- 3 Locate the module **Litigation Connector for AccuRoute v4.0** in the **Downloads & Docs** section.
- 4 Download the module and save it to a local drive.
- 5 Extract the files to a location on your AccuRoute server.

---

### Special instructions for clustered servers

If you are applying the connector to AccuRoute servers in a cluster you must follow the steps outlined below:

**To apply the Litigation Connector for AccuRoute v4.0 to AccuRoute servers in a cluster:**

- 1 Shut down the secondary server.
- 2 Stop the Cluster Manager service in the primary server.
- 3 Apply the connector to the primary server. Go to [Applying the Litigation Connector for AccuRoute v4.0](#).
- 4 Start the secondary server.
- 5 Shut down the primary server.

- 6 Stop the Cluster Manager service in the secondary server.
- 7 Apply the connector to the secondary server. Go to [Applying the Litigation Connector for AccuRoute v4.0](#).
- 8 Start the primary server.
- 9 Confirm that the primary server has resumed the workload in the cluster.

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## Applying the Litigation Connector for AccuRoute v4.0

### To apply the Litigation Connector for AccuRoute v4.0:

- 1 Go to the location where you saved the `ARS4.0-LitigationConnector.exe` file.
- 2 Shut down all Omtool services.

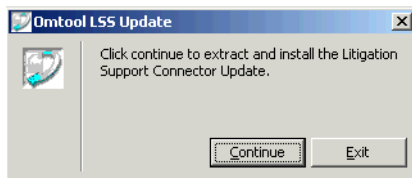
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**Note** Since the installation of this connector requires shutdown of all services, you must plan to install the connector after hours or at a time when production will not get affected.

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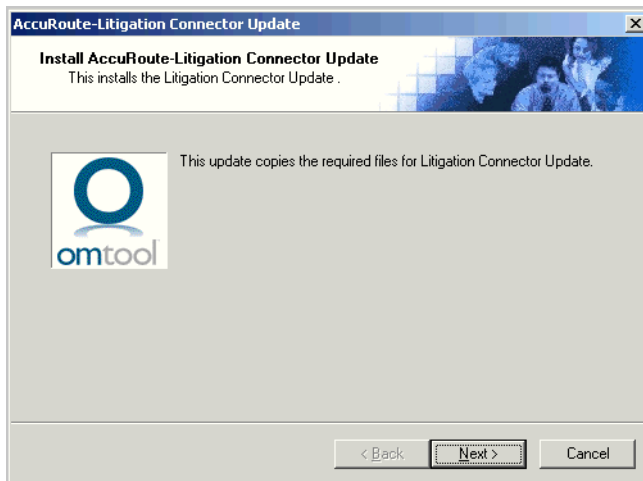
- 3 Double-click the executable.

The **Omtool LSS** page opens prompting you to extract and install the connector.

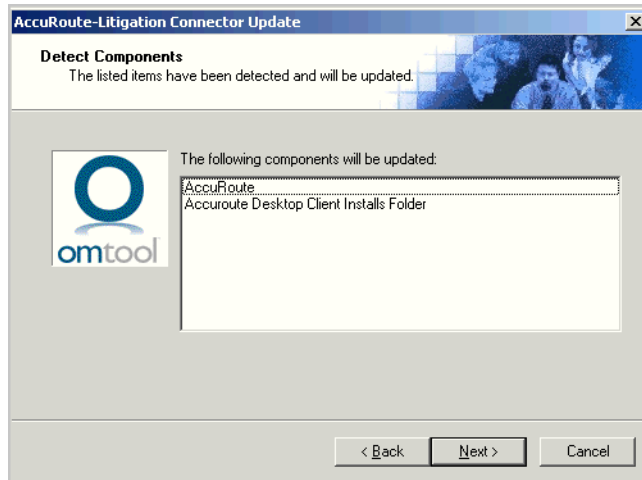


- 4 Click **Continue** to extract the files to a temporary location on your system.

When extraction is complete, the **AccuRoute-Litigation Connector** page opens.

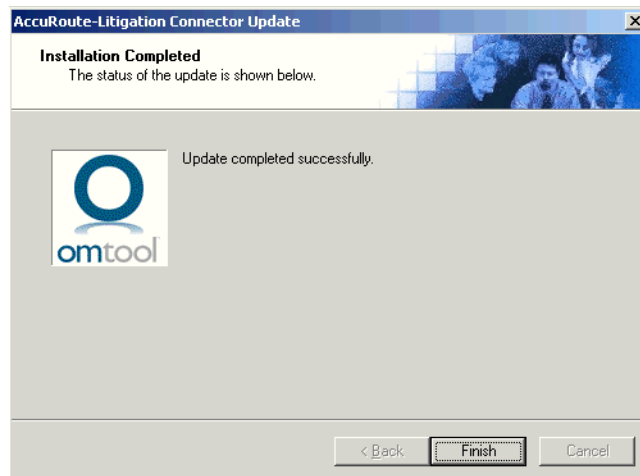


- 5 Click **Next**. The **Detect Components** page opens listing all the components that will get updated.



- 6 Click **Next** to begin the update.

A progress bar shows the status of the update. When update is complete, the **Installation Completed** page appears.



- 7 Click **Finish** to exit the wizard.

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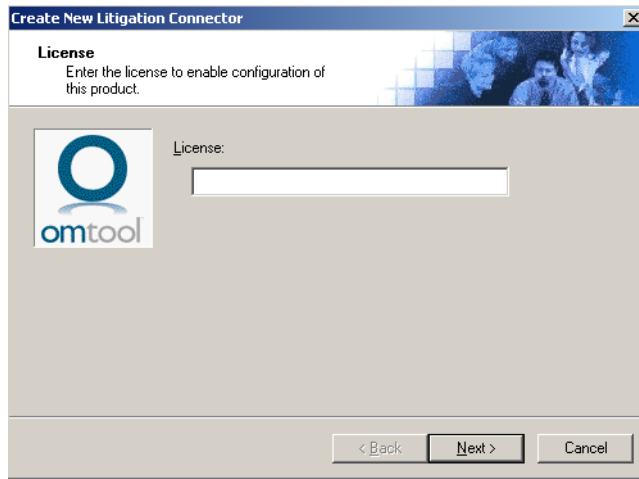
## Adding the Litigation Support connector to the AccuRoute server

**Note** If you have an existing LSS connector, delete the existing connector, install the Litigation Connector for AccuRoute v4.0 and then add a new LSS connector.

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**To add the Litigation Support connector for Ringtail:**

- 1 Open the Omtool Server Administrator console.
- 2 Right-click **Connectors** in the console tree and select **New > Litigation Support Connector**. The **License** page opens.

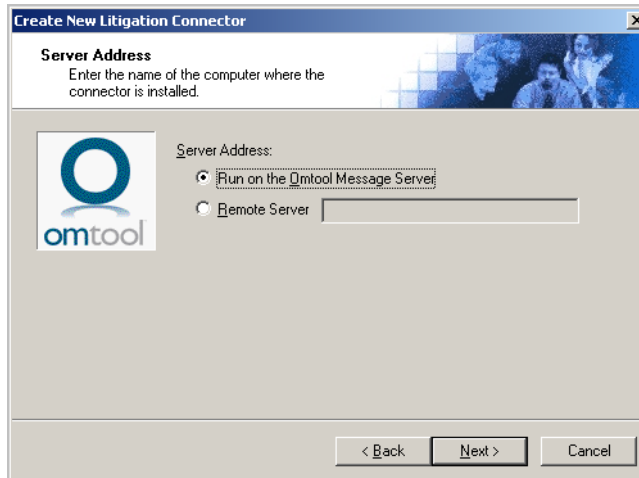


The screenshot shows a dialog box titled "Create New Litigation Connector". The main heading is "License" with the instruction "Enter the license to enable configuration of this product." On the left is the Omtool logo. To the right of the logo is a text box labeled "License:" with a blank input field. At the bottom are three buttons: "< Back", "Next >", and "Cancel".

- 3 In the **License** text box, enter the license key for the Litigation Support System connector.

**Note** If you do not have a license, contact [omtool sales](#).

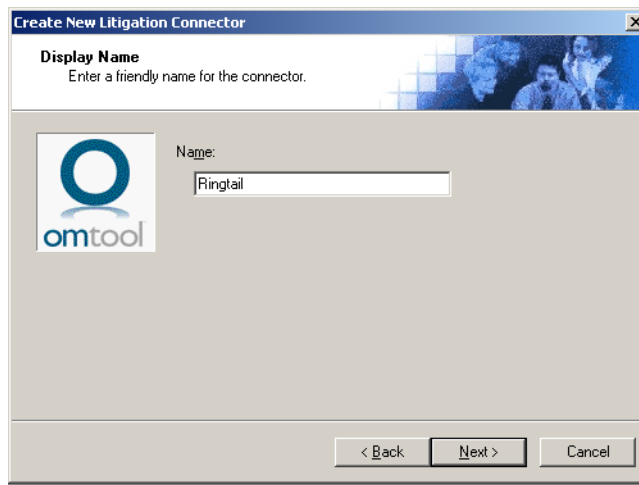
- 4 Click **Next**. The **Server Address** page opens.



The screenshot shows the same dialog box, but now on the "Server Address" page. The instruction is "Enter the name of the computer where the connector is installed." The Omtool logo is on the left. To the right, under "Server Address:", there are two radio button options: "Run on the Omtool Message Server" (which is selected) and "Remote Server" (with a blank text box next to it). At the bottom are three buttons: "< Back", "Next >", and "Cancel".

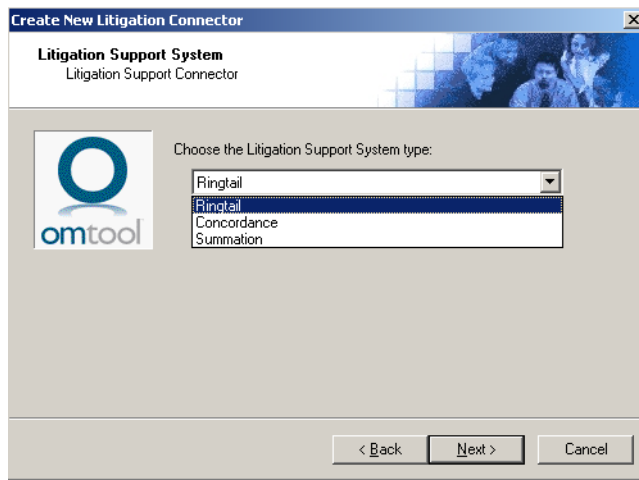


- 5 Click **Next**. The **Display Name** page opens.



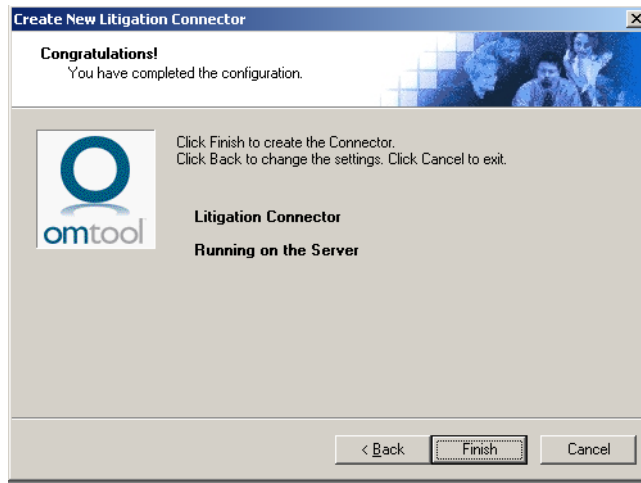
The screenshot shows a dialog box titled "Create New Litigation Connector". The main heading is "Display Name" with the instruction "Enter a friendly name for the connector." On the left is the Omtool logo. To the right, there is a "Name:" label and a text input field containing the word "Ringtail". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

- 6 Enter a descriptive name for this connector in the **Name** text box and click **Next**. The **Litigation Support System** page opens.



The screenshot shows the same dialog box, now at the "Litigation Support System" step. The heading is "Litigation Support System" with the sub-heading "Litigation Support Connector". On the left is the Omtool logo. To the right, there is a label "Choose the Litigation Support System type:" and a dropdown menu. The dropdown menu is open, showing three options: "Ringtail" (which is selected), "Concordance", and "Summation". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

- 7 Select **Ringtail** from the drop-down list and click **Next**. The **Congratulations** page opens.



- 8 Click **Finish**.

---

## Reinstalling AccuRoute Desktop on all client systems

After you have installed the Litigation Connector for AccuRoute v4.0 on the server, new setup files for Accuroute Desktop are available in the <C:\Program Files\omtool\Omtool Server\clients\AccuRouteDesktop> folder. You must reinstall Accuroute Desktop on all client systems using the new setup files from this folder to take advantage of the AccuRoute Desktop v4.0 enhancements.

For more information on how to install AccuRoute Desktop, see the [AccuRoute Desktop installation guide](#).

# Section 4: Required Configurations

This section includes:

[Pre-configuring Ringtail cases directory structure](#) (4-1)

[Configuring the Sequencer component](#) (4-3)

[Configuring Registered Users](#) (4-4)

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## Pre-configuring Ringtail cases directory structure

Before you install the Litigation Support connector, you need to create a directory structure for the case load files. After creating the directory structure, set sharing and security permissions on each folder.

### Creating a directory structure to support Ringtail cases

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**Note** If you add cases to Ringtail after the initial setup of the connector, you will need to add them to the directory structure for Ringtail as well.

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**To create the Ringtail directory structure:**

- 1 Create the top level folder named Ringtail Load Files and give it a descriptive name.
- 2 Under the Ringtail Load Files folder, create a sub-folder for every case with which you want to work.
- 3 Within each case's sub-folder, create a **Working** folder and a **Final** folder.

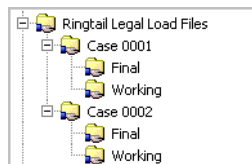
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**Note** The root folder or case folder name should not contain spaces or special characters.

---

The directory structure should be similar to the one shown here:

**Figure 4-A: Directory structure**



The above illustration is a valid directory structure for Ringtail.

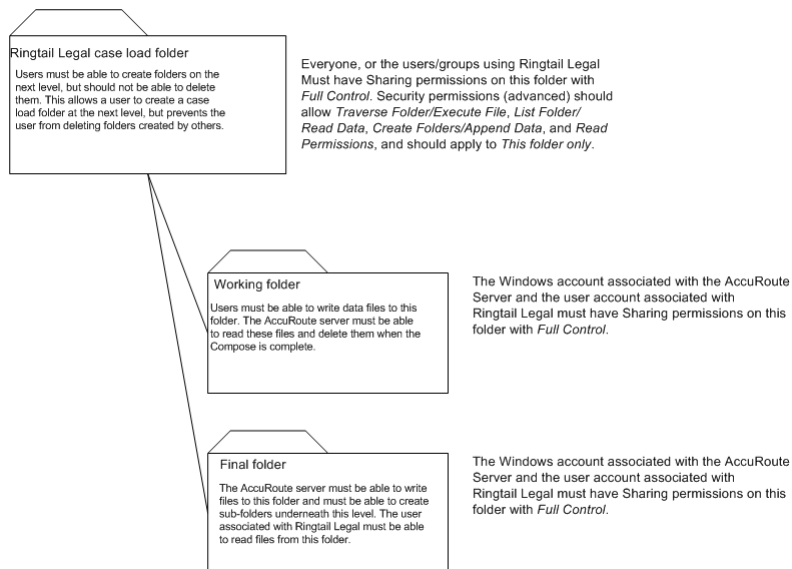
## Setting sharing permissions and security permissions

After you create the directory structure for Ringtail, configure the sharing and security permissions.

The minimum required sharing and security permissions allow users to do the following:

- All Ringtail users must be able to access all levels of the Ringtail Load Files structure.
- All Ringtail users must be able to create folders on the level below the Ringtail Load Files folder.
- The Windows account associated with the Omtool server must have access to all levels of the Ringtail Load Files structure and security permissions with Full Control.
- The user account associated with Ringtail must have access to all levels of the Ringtail Load Files structure and security permissions with Full Control.
- If you are in a clustered environment, you must locate case directories on a high profile server.

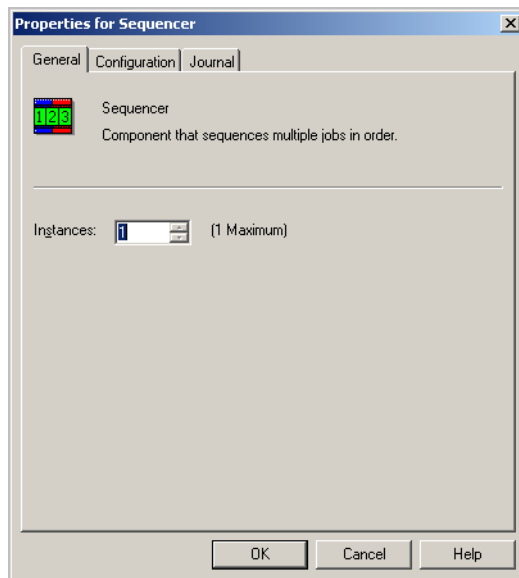
**Figure 4-2: Minimum requirements for Ringtail**



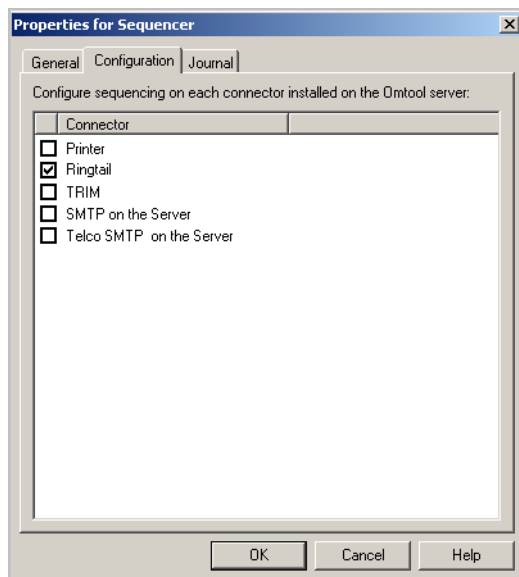
The above diagram illustrates the minimum requirements for Ringtail users.

## Configuring the Sequencer component

- 1 Start Omtool Server Administrator.
- 2 Click **Components** in the console tree, and double-click the **Sequencer** component in the details pane.



- 3 Click the **Configuration** tab. A list of installed destination connectors appears.
- 4 Select the Ringtail connector. If you want to view the connector names in alphabetical order, click **Connector** in the title bar.



- 5 Click **OK**.

When you enable the Ringtail connector for sequencing, the Sequencer component creates an internal queue for the connector. Submitting a job to the Ringtail connector adds it to the internal queue in the order in which it was submitted. After a successful Compose, the Sequencer component holds the job in the queue until any previous jobs to the Ringtail connector have completed composing.

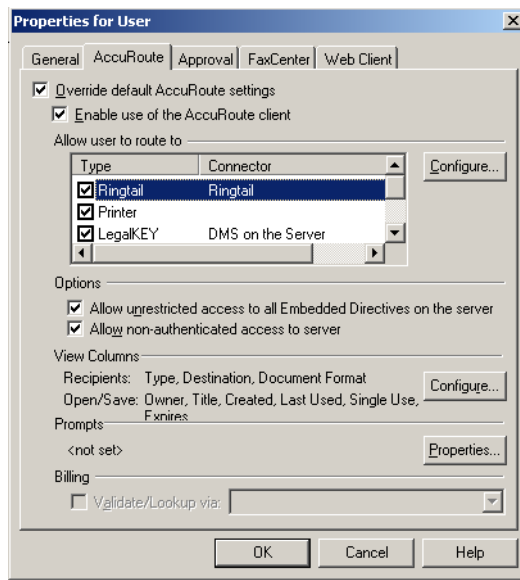
## Configuring Registered Users

If you have added support for Ringtail and you want to make it available to users as a recipient type in AccuRoute Desktop, you must modify the AccuRoute properties of registered users.

If any individual users are registered on the Omtool server, complete this procedure once to modify user defaults and once for each individual user.

### To enable Ringtail as a recipient type in AccuRoute Desktop for default or individual registered users:

- 1 Click **Registered Users** in the console tree and double-click an individual user in the details pane, or right-click **Registered Users** in the console tree and select **User Defaults**.
- 2 Click the **AccuRoute** tab.
- 3 Select **Enable use of the AccuRoute Client**.
- 4 Locate the **Allow user to route to list** and select **Ringtail**.



- 5 Click **OK** to save your changes.

**Note** Changes made to **Registered Users > User Defaults** do not affect any individual registered user. Individual registered users will need to be modified separately (using the same procedure described here, Ringtail as a recipient type must be enabled for them) before they can see Ringtail listed as a recipient type in their AccuRoute Desktop.

Ringtail is now available as a recipient in AccuRoute Desktop.

# Section 5: Configuring Cases

This section includes:

[Adding cases to the Litigation Support System connector](#) (5-1)

[Adding custom user-defined fields to the Litigation Support System connector \(optional\)](#) (5-4)

[Modifying custom user-defined fields in the Litigation Support System connector for Ringtail](#) (5-8)

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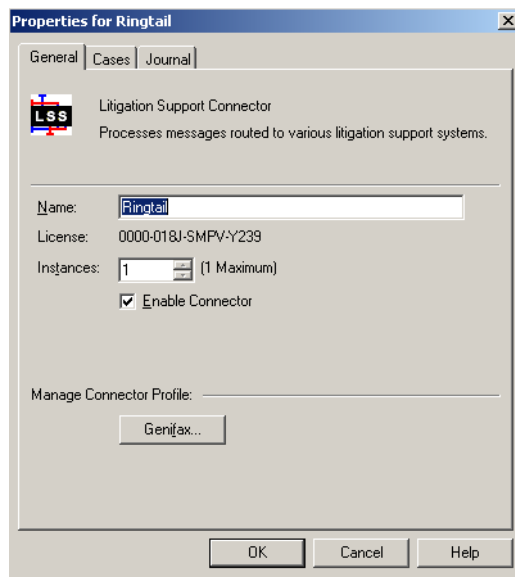
## Adding cases to the Litigation Support System connector

**Note** If you add cases to Ringtail after the initial setup of the connector, you will need to add them to the Litigation Support connector for Ringtail as well.

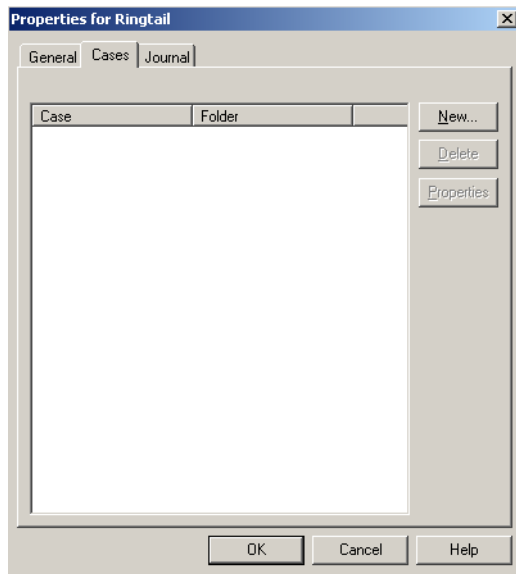
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### To add a new case:

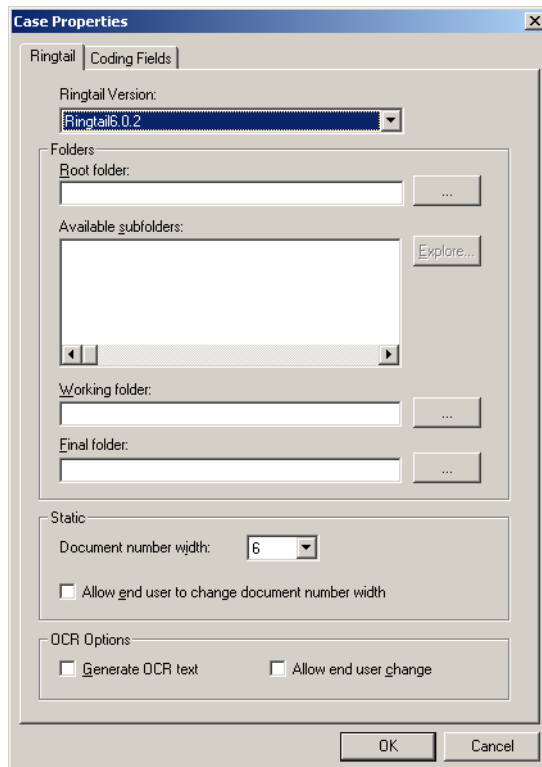
- 1 Start the Omtool Server Administrator.
- 2 Click **Connectors** in the console tree, and double-click the Litigation Support System connector in the **Details** pane. The **Properties** page opens.



- 3 Click the **Cases** tab.



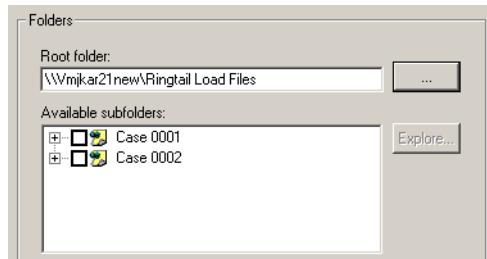
- 4 Click **New**. The **Case Properties** page opens.



- 5 From the **Ringtail Version** drop-down list, select the Ringtail version. The choices are **Ringtail v6.0.2** (default) and **Ringtail 2005**.
- 6 In the **Root folder** section, browse to the top-level folder of the directory structure you created for the TIFF and OCR text files. For more information, see [Pre-configuring Ringtail cases directory structure](#) (4-1).



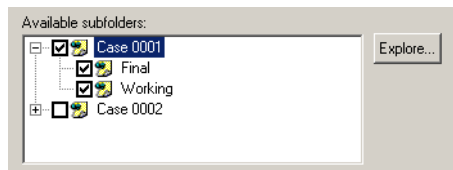
After you select the top-level folder, available sub-folders appear in the **Available subfolders** section.



- 7 In the **Available subfolders** section, expand the sub-folder for the case you are adding and select the **Final** and **Working** folders where you want users to create TIFF and OCR text files.

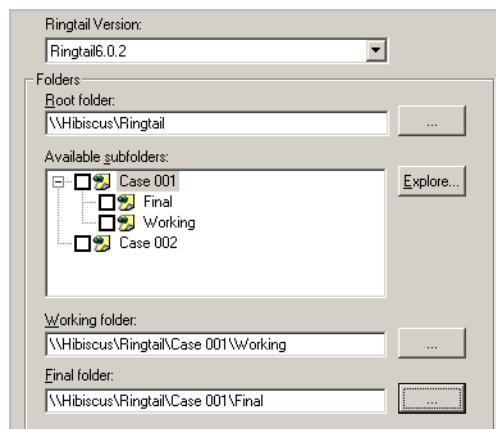
When you select a sub-folder, the **Explore** button becomes active. If you click **Explore**, it opens a Windows Explorer window that allows you to manage the selected folder.

You can only select one case at the sub-folder level. After you expand the case sub-folder, you can then manage folders within the case sub-folder. If you select more than one case sub-folder the following error appears: *You have selected a folder within the case 'Case Name', however, one or more folders within the case 'Case Name' has already been selected. You may only select folders within a single case.*



- 8 In the **Working folder** section, browse to the working folder for the case load file.
- 9 In the **Final folder** section, browse to the final folder for the case load file.

**Note** Load files are stored in the working folder until the end of load file Routing Sheet is received by the Omtool server. When the end of load file Routing Sheet is received by the Omtool server, the Litigation Support System connector for Ringtail copies the load files from the working folder to the final folder.



- 10** In the **Static** section, select a **Width** from the drop-down list. The Width field is used to control the width of the starting number field used to number document and page files.

The starting number field is added to the file name during the Compose process. For example if the Width is set to six, the resulting file name will be 000001.tif. The starting number (in this example 000001) indicates the first individual file number of the single page files.

In most cases, documents will be numbered starting with the specified number. If there is a document with a higher number already referenced in the load file, however, the starting number will begin at the next highest number.

- 11** If you want to allow end users to change the document number width, check the box beside **Allow end user to change document number width** option.

---

**Note** Document number width should not be changed till the case is closed as this may lead to issues with document naming.

---

- 12** In the **OCR Options** section, select from:

- ▶ **Generate OCR text** - Selecting this option will create OCR text files in addition to the single page TIF files. OCR text files are searchable when imported into Ringtail. If this option is not selected, only the single page TIF files are created, and the document is not searchable within Ringtail.
- ▶ **Allow end user change** - Selecting this option will allow end user to decide whether to create OCR text files in addition to the single page TIF files or not.

- 13** Click **OK** to save your changes and create the case.

---

## Adding custom user-defined fields to the Litigation Support System connector (optional)

The Litigation Support System connector contains, by default, three custom fields:

- **Title**
- **Description**
- **Document Type**

The **Coding Fields** tab allows you to add or modify additional user-defined fields that are explicitly supported by Ringtail.

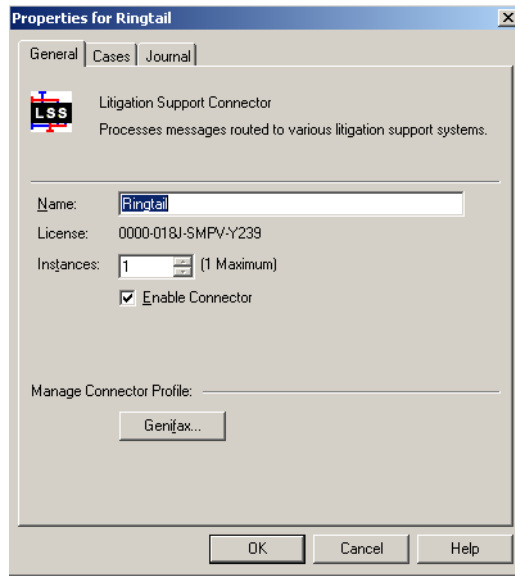
---

**Note** You should not add new Coding fields to a case till it is closed as the information may not be correctly updated in the load file.

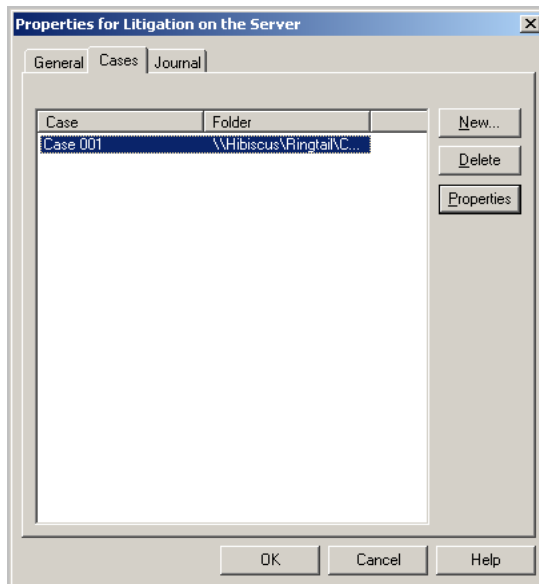
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**To add a custom user-defined field:**

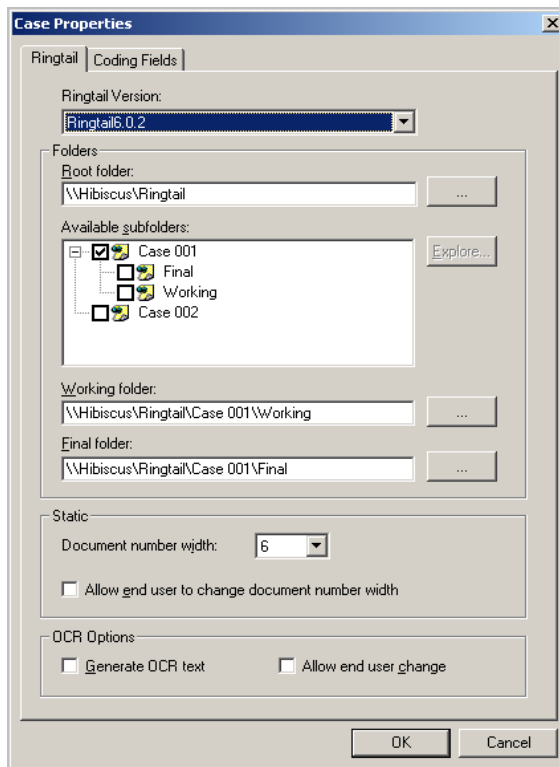
- 1 Open the Omtool Server Administrator.
- 2 Click **Connectors** in the console tree, and double click the Litigation Support System connector in the details pane. The **Properties** page opens.



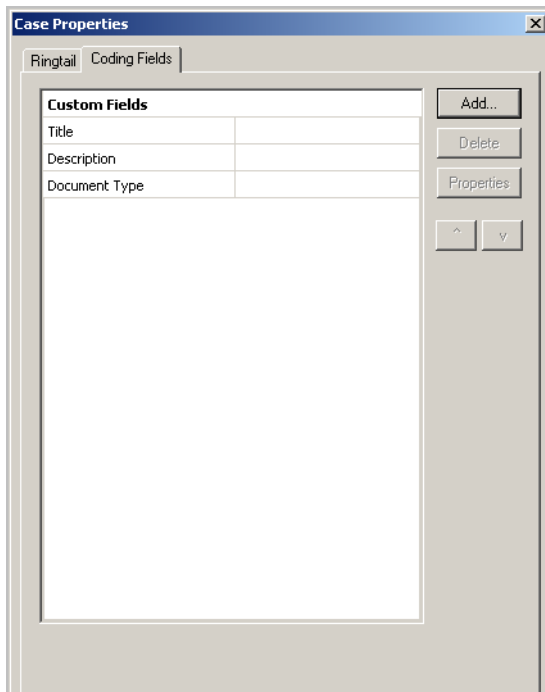
- 3 Click the **Cases** tab.



- 4 Click **New**. The **Case Properties** page opens.



- 5 Click the **Coding Fields** tab. Three pre-defined custom fields for Ringtail are displayed—**Title**, **Description**, and **Document Type**.



- 6 Click **Add**. The **Field Properties** page opens.

- 7 In the **Name** text box, enter the field name as it exists in Ringtail. This is the actual, unique field name and not a display name.
- 8 In the **Display Name** text box, enter a descriptive name for the field you are adding. The name you enter here appears as a label on the **Coding Fields** tab in both the Litigation Support System connector for Ringtail and AccuRoute Desktop.
- 9 From the **Type** drop-down list, select one of the following values. The value you select determines the kind of control that is presented to the AccuRoute Desktop user on the **Coding Fields** tab when adding a Ringtail destination.
- ▶ **STRING** - This type stores characters and words, and is included within double quotation marks. Numbers and other numerical characters are treated as text. For example: “*This is string value number 1.*”
  - ▶ **NUMBER** - This type stores whole numbers. For example: *250*
  - ▶ **BOOLEAN** - This type presents a true/false choice for the field. Select the check box if the property is true, clear the check box if the property is false. For example: *Active case?*
  - ▶ **DATE** - This type defaults the value of the field to today’s date. The date is presented in mm/dd/yyyy format, and the AccuRoute Desktop user can change the date. For example: *12/05/2006*
  - ▶ **PICK** - This type presents a pick list of data to the AccuRoute Desktop user via a drop-down box. When you select this type, the **Choices** and **Allow any value in PICK fields** are enabled. For example, the following values could appear on a pick drop-down list: *1 2 3 4 5*
- 10 In the **Choices** text box, enter the valid values in this field, separated by a delimiter. Valid delimiters are comma ( , ), pipe ( | ), and semicolon ( ; ).

---

**Important** This text box is enabled only for the data type **Pick**.

---

- 11 In the **Options** section, select one or more of the following options:
- ▶ **Visible** - If this option is selected, the custom field is visible to the AccuRoute Desktop user on the **Coding Fields** tab. If this option is not selected, the AccuRoute Desktop user cannot see the custom field on the **Coding Fields** tab. Some fields specific to Ringtail are always enabled.

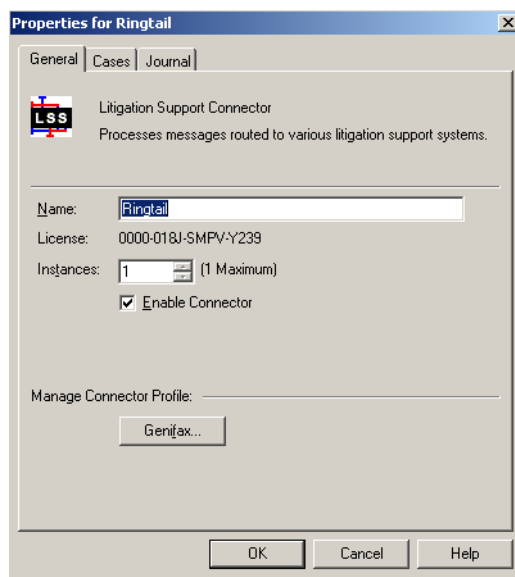
- ▶ **Required** - If this option is selected, the custom field is required when adding a Ringtail destination within AccuRoute Desktop. Selecting this option makes the custom field visible to the AccuRoute Desktop user even if the Visible option is not selected. If this option is not selected, the AccuRoute Desktop user can choose not to include information for this field on the message.
  - ▶ **Allow user to enter new values in picklist** - If this option is selected, when the AccuRoute Desktop user sees a field on the Coding Fields tab that contains a pick list, the user can enter information not included on the pick list. If this option is not selected, the AccuRoute Desktop user is restricted to the choices displayed in the pick list.
- 12 Click **OK** three times to save your changes and close the **Properties** page.
  - 13 Continue to [Modifying custom user-defined fields in the Litigation Support System connector for Ringtail](#). This step is only necessary if you have added a custom user-defined field and need to change it.

---

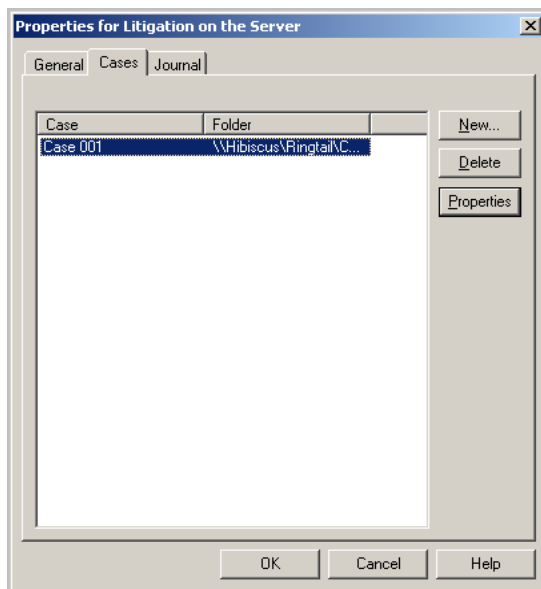
## Modifying custom user-defined fields in the Litigation Support System connector for Ringtail

### To modify a custom user-defined field:

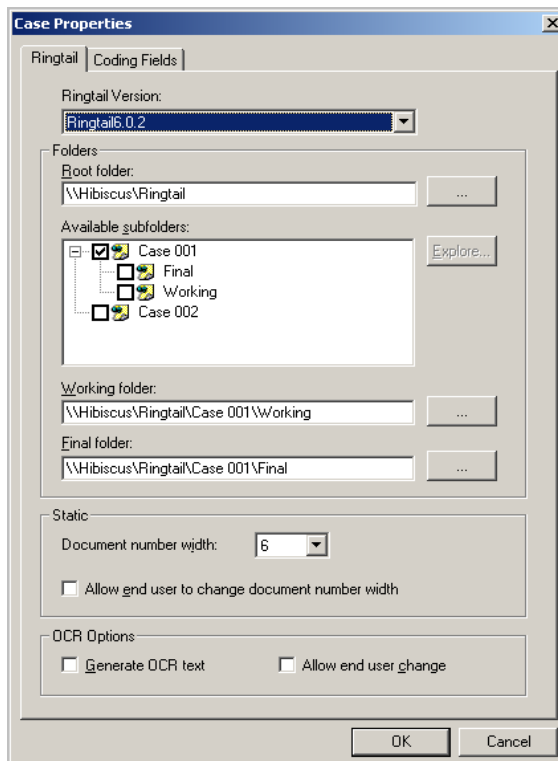
- 1 Open the Omtool Server Administrator.
- 2 Click **Connectors** in the console tree, and double click the Litigation Support System connector in the details pane. The **Properties** page opens.



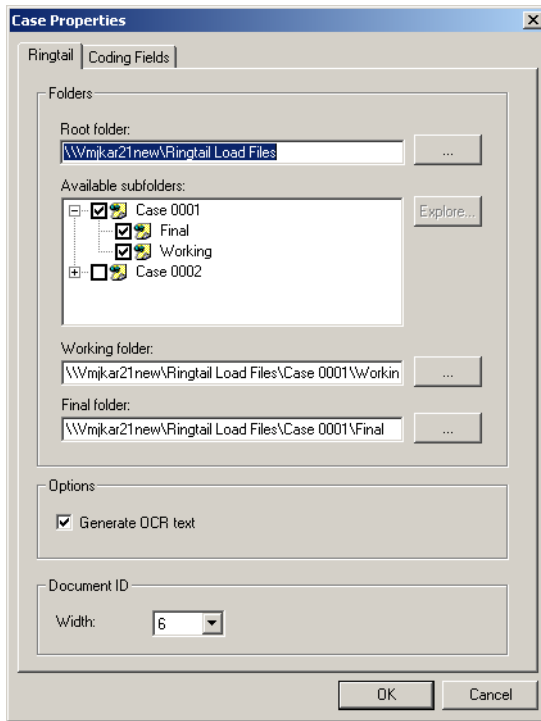
3 Click the **Cases** tab.



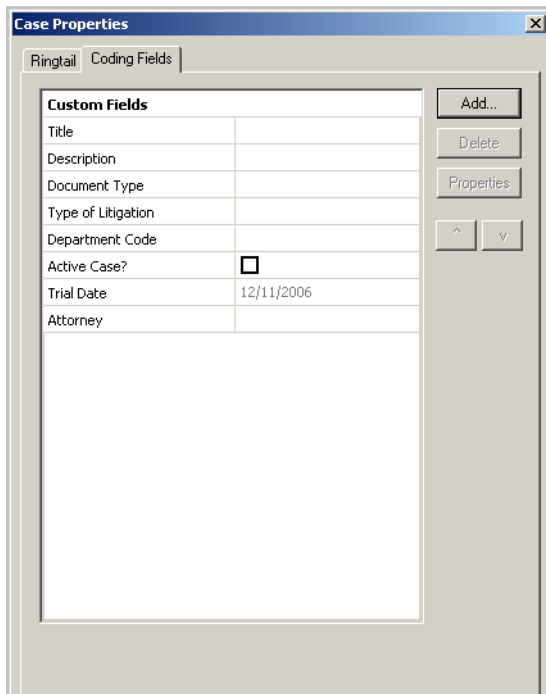
4 Click **New**. The **Case Properties** page opens.



5 Highlight a case and click **Properties**. The **Case Properties** page opens.

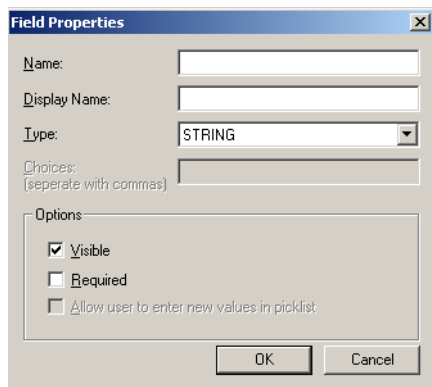


6 Click the **Coding Fields** tab.





- 7 Highlight a field and click **Properties**. The **Field Properties** page opens.



The screenshot shows a dialog box titled "Field Properties" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Name:** A text input field.
- Display Name:** A text input field.
- Type:** A dropdown menu currently set to "STRING".
- Choices:** A text input field with the instruction "(separate with commas)" below it.
- Options:** A section containing three checkboxes:
  - Visible
  - Required
  - Allow user to enter new values in picklist

At the bottom of the dialog are two buttons: "OK" and "Cancel".

- 8 Make any changes necessary and then click **OK** to save your changes.



# Section 6: Testing

This section includes:

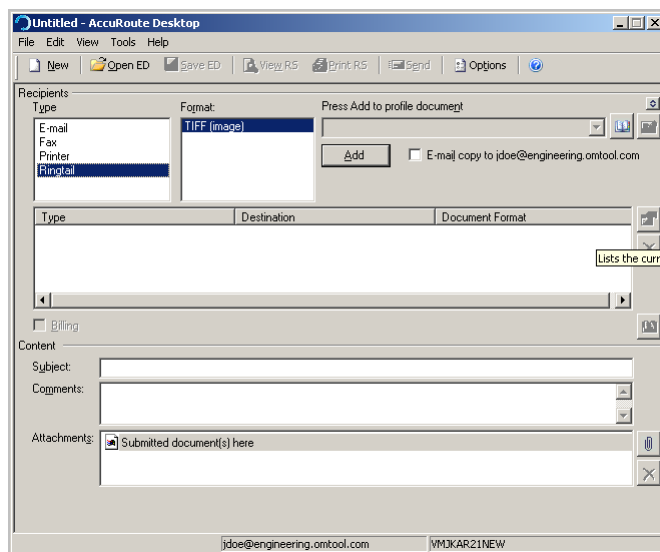
[Sending a message to Ringtail from Accuroute Desktop](#) (6-1)

[Sending an End of Load file using AccuRoute Desktop](#) (6-7)

## Sending a message to Ringtail from Accuroute Desktop

Use the following procedure to send a message using AccuRoute Desktop. For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to [Related AccuRoute 4.0 documentation](#) on 1-2.

- 1 Start AccuRoute Desktop. Click **Start**, go to the Omtool programs group, and select **AccuRoute Desktop**. Log in if prompted. The application appears on your desktop.



- 2 Select the **Recipient** type as **Ringtail** in the **Recipients Type** list. The only available file format is TIFF (image).
- 3 Verify that TIFF (image) is selected as the file format.

- 4 Click **Add**. The Ringtail configuration wizard opens.

- 5 From the **Case Name** drop down, select a case.
- 6 Click **Next**. The **Options** page opens.

- 7 In the **Starting Number** text box, enter a starting number or accept the default of **1**.

In most cases, documents will be numbered starting with the specified number. If there is a document with a higher number already referenced in the load file, however, the starting number will begin at the next highest number.

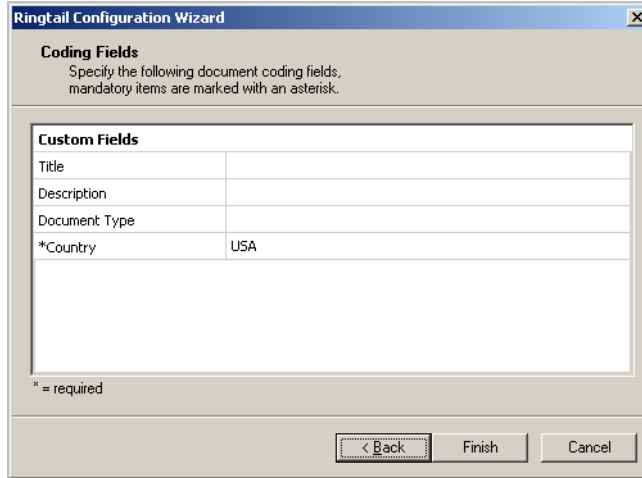
The starting field is added to the file name during the Compose process. For example, if Width is set to six, the resulting file name will be `000001.tif`. The starting number (in this example `000001`) indicates the first individual file number of the single page files.

- 8 In the **Width** text box, enter the document width.

**Note** The **Width** text box is grayed out if the **Allow end user to change document number width** option is not checked in the case.

- 9 In the **Folder** text box, select the folder where Image files will be saved. It is recommended that you choose the Final folder (specified when configuring a case) for saving Image files.

**10** Click **Next**. The **Coding Fields** page opens.



**11** Enter information for any custom user-defined fields. If it is a required field, (has an \*) you must enter information for that field. Shown below are some examples of custom fields and their possible value.

**String** - If a custom user-defined field is defined as a string value field, you can enter alpha or numeric text.

Custom Fields	
Title	Document Title
Description	Document Description
Document Type	Document Type
Type of Litigation	Personal injury
Department Code	
Active Case?	<input type="checkbox"/>
Trial Date	12/12/2006
Attorney Name	

**Number** - If a custom user-defined field is defined as a number field, you can only enter whole numbers.

Custom Fields	
Title	Document Title
Description	Document Description
Document Type	Document Type
Type of Litigation	Personal injury
Department Code	250
Active Case?	<input type="checkbox"/>
Trial Date	12/12/2006
Attorney Name	

**Boolean** - If a custom user-defined field is defined as a boolean field, select the check box if the answer is true, and clear the check box if the answer is false.

Custom Fields	
Title	Document Title
Description	Document Description
Document Type	Document Type
Type of Litigation	Personal injury
Department Code	250
Active Case?	<input checked="" type="checkbox"/>
Trial Date	12/12/2006
Attorney Name	

**Date** - If a custom user-defined field is defined as a date field, the field defaults to today's date. To change the date, click on the date, click the down arrow, and select the correct date from the calendar that appears.

Custom Fields	
Title	Document Title
Description	Document Description
Document Type	Document Type
Type of Litigation	Personal injury
Department Code	250
Active Case?	<input checked="" type="checkbox"/>
Trial Date	12/12/2006
Attorney Name	

December, 2006

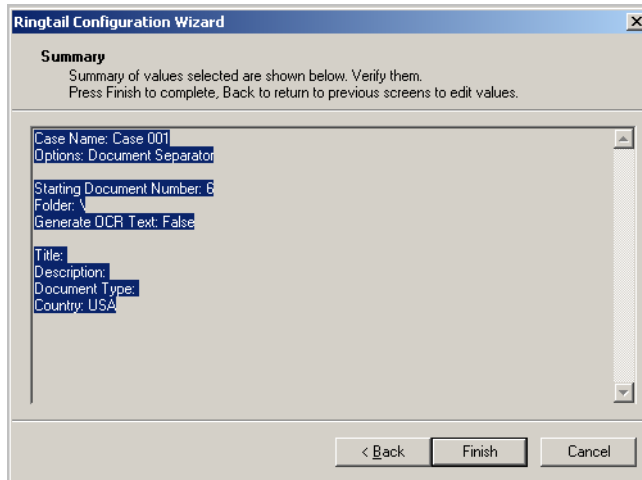
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

\* = required  
📅 Today: 12/12/2006

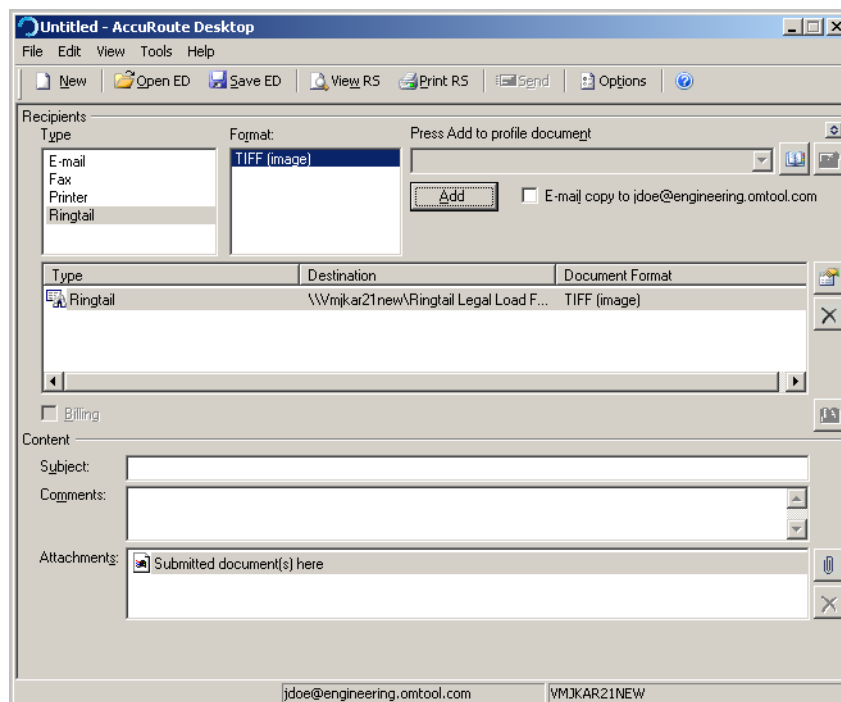
**Pick** - If a custom user-defined field is defined as a pick-list field, select a value from the drop-down list. Depending on your system's configuration, you may be able to enter your own values.

Custom Fields	
Title	Document Title
Description	Document Description
Document Type	Document Type
Type of Litigation	Personal injury
Department Code	250
Active Case?	<input checked="" type="checkbox"/>
Trial Date	12/12/2006
Attorney Name	<div style="border: 1px solid black; padding: 2px;"> <span style="font-size: small;">Smith</span>  <span style="font-size: small;">Jones</span>  <span style="font-size: small;">Wells</span>  <span style="font-size: small;">White</span> </div>

- 12 Click **Next**. A **Summary** page opens listing all the information you have entered in the wizard.



- 13 Click **Finish** to close the wizard. The Ringtail destination appears in the message.

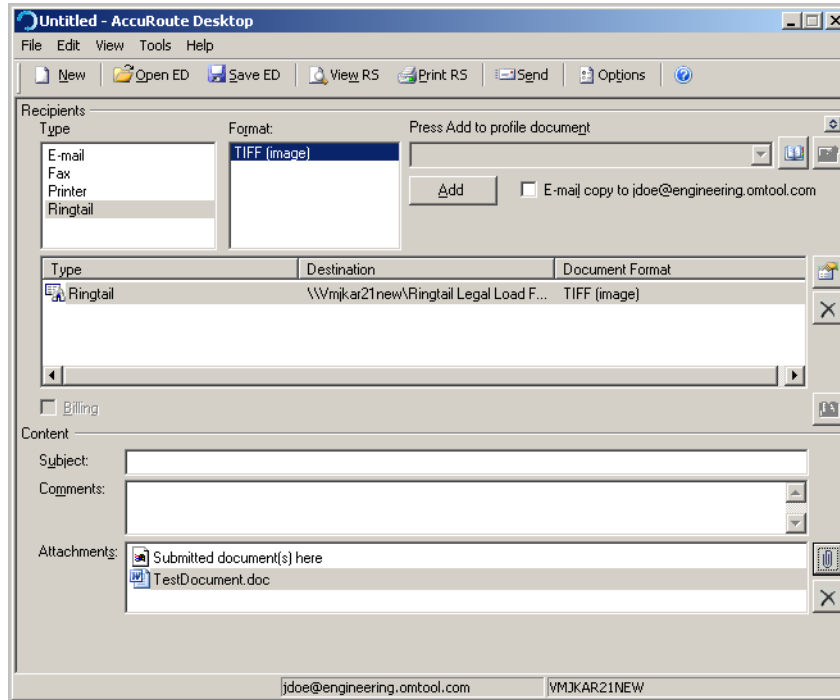


- 14 Add content to your message.

- a Locate the **Content** section at the bottom and type a subject and comments.
- b Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:

**File** - Select this option to attach a file saved from your computer or network share. Go to the file, select it, and click **Open**. The file appears in the attachments list.

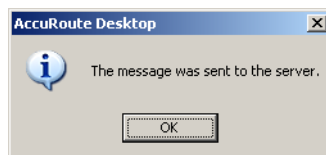
**Web document** - Select this option to attach a web page from the Internet. Enter the address of the web document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML), and click **OK**.



**15** Send or save the message. You can do one of the following:

- ▶ **Send the message immediately** - To send the message, click **Send** on the toolbar. (Your message must have at least one attachment.)
- ▶ **Save the message as an Embedded Directive** - To save as an Embedded Directive, click **Save ED** on the toolbar. In the **Save As** page, enter a descriptive title in the **Title** text box. Click **Save**.
- ▶ **Print a Routing Sheet that can be scanned with hard copy documents** - To generate a Routing Sheet, save the message as an Embedded Directive. Then click **Print RS** on the toolbar. AccuRoute Desktop creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your network administrator. (Your message can include both electronic and hard copy documents.)

When you send a message and it is delivered to the AccuRoute sever for processing, you will see the following message.



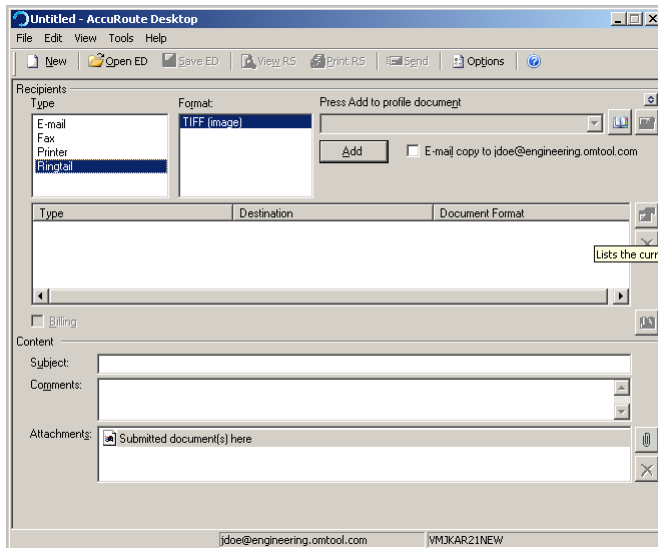
After the messages are processed by the server, the output TIFF and OCR text files are generated in the **Final** folder. The load file (with MDB format) is generated in the **Working** folder.



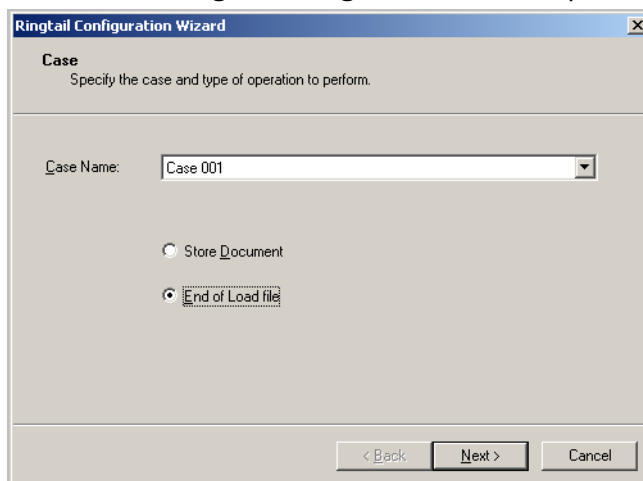
## Sending an End of Load file using AccuRoute Desktop

To send an End of Load file message using AccuRoute Desktop:

- 1 Start AccuRoute Desktop. Click **Start**, go to the Omtool programs group, and select **AccuRoute Desktop**. Log in if prompted. The application appears on your desktop.

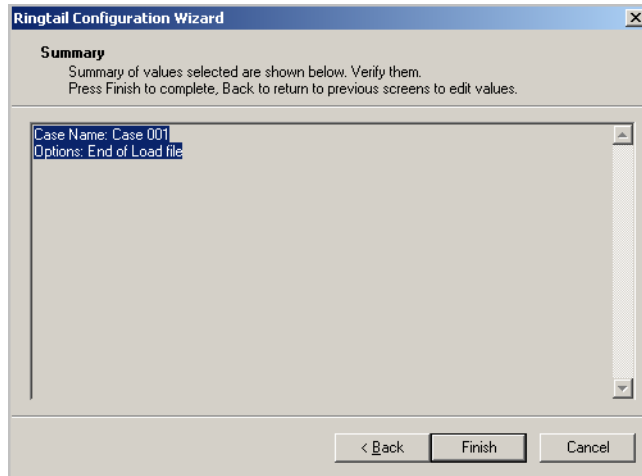


- 2 Select the **Recipient** type as **Ringtail** in the **Recipients Type** list. The only available file format is TIFF (image).
- 3 Verify that TIFF (image) is selected as the file format.
- 4 Click **Add**. The **Ringtail Configuration Wizard** opens.



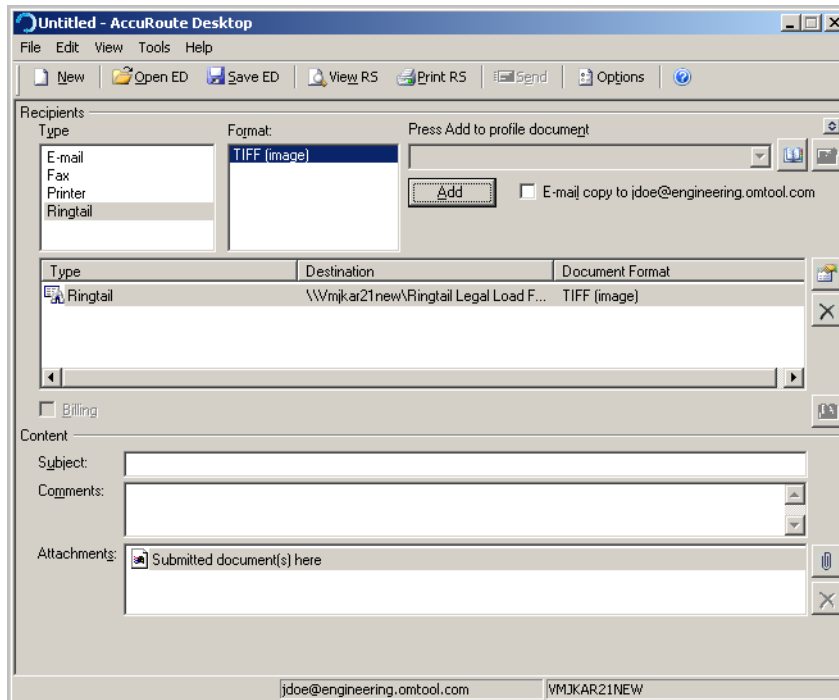
- 5 From the **Case Name** drop-down, select a case and select the **End of Load File** option.

6 Click **Next**. A **Summary** page opens.



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

The Ringtail destination appears in the message.



8 Add content to your message.

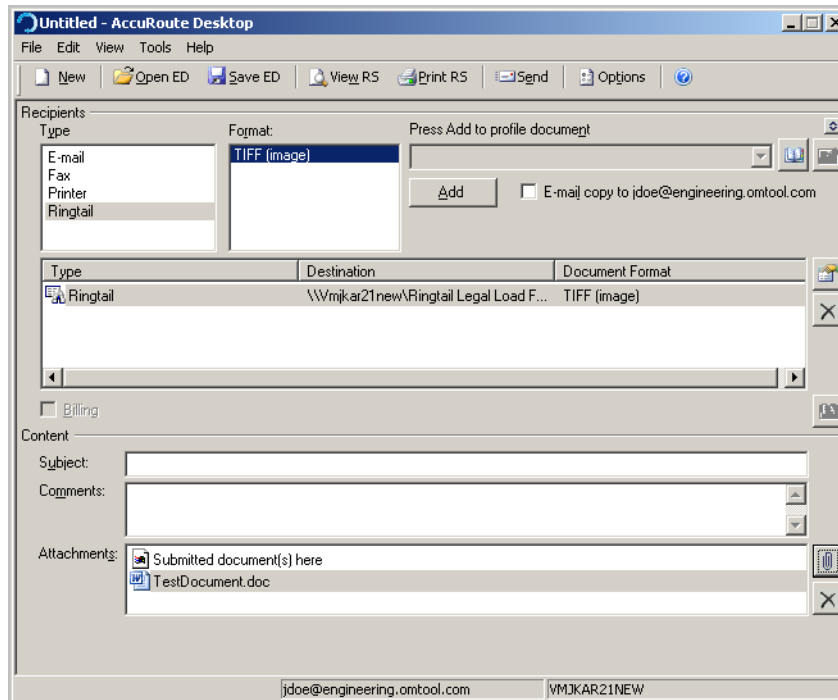
- a Locate the **Content** section at the bottom and type a subject and comments.
- b Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:

**File** - Select this option to attach a file saved from your computer or network share. Go to the file, select it, and click **Open**. The file appears in the attachments list.

**Web document** - Select this option to attach a web page from the Internet. Enter the address of the web document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML).

**Note** Any content that you add to an End of Load File is not saved. An attachment is added only to send the message from the AccuRoute Desktop application.

9 Click **OK**.



10 Send or save the message. You can do one of the following:

- ▶ **Send the message immediately** - To send the message, click **Send** on the toolbar. (Your message must have at least one attachment.)
- ▶ **Save the message as an Embedded Directive** - To save as an Embedded Directive, click **Save ED** on the toolbar. In the **Save As** page, enter a descriptive title in the **Title** text box. Click **Save**.
- ▶ **Print a Routing Sheet that can be scanned with hard copy documents** - To generate a Routing Sheet, save the message as an Embedded Directive. Then click **Print RS** on the toolbar. AccuRoute Desktop creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your network administrator. (Your message can include both electronic and hard copy documents.)

11 Send end of load file Routing Sheets through the standard network scanning process.

After the messages are processed by the server, the output TIFF and OCR text files are generated in the **Final** folder. The load file (with MDB format) is generated in the **Working** folder.

Section 6: Testing

# Section 7: Troubleshooting

This section includes:

[Detecting workflow issues](#) (7-1)

[Troubleshooting the delivery mechanism](#) (7-1)

[Troubleshooting the message on the Omtool server](#) (7-1)

[Troubleshooting the multifunction device](#) (7-3)

[Troubleshooting the client](#) (7-3)

[Routing sheets do not display Ringtail destination](#) (7-4)

Complete these procedures in the order in which they appear. If you cannot resolve the issue, contact Omtool.

---

## Detecting workflow issues

After a document has been profiled to Litigation Support connector for Ringtail, the document should arrive at its destination momentarily, but can take up to several minutes when the server workload is high. If a document does not arrive at its destination within a reasonable period of time, begin troubleshooting the environment.

Omtool recommends troubleshooting the workflow in reverse order because this is the easiest way to troubleshoot the setup on your own. When a document does not arrive at its destination, troubleshooting starts with Litigation Support connector for Ringtail, and then continues to the Omtool server, the device (if applicable), and then the client.

Continue to [Troubleshooting the delivery mechanism](#).

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## Troubleshooting the delivery mechanism

When the Omtool server finishes processing a message, an outbound connector routes the message directly to its destination or passes the message to Litigation Support connector for Ringtail. Do some basic troubleshooting on the Litigation Support connector for Ringtail. For example, is the connector enabled? If the Litigation Support connector for Ringtail is functioning correctly, troubleshoot the message on the Omtool server.

Continue to [Troubleshooting the message on the Omtool server](#).

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## Troubleshooting the message on the Omtool server

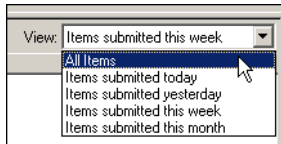
There are two important questions that can be resolved when troubleshooting a message on the Omtool server:

## Section 7: Troubleshooting

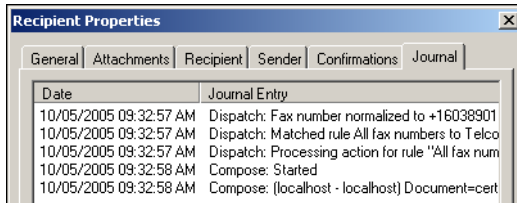
- Was the message submitted to the Omtool server?
- Assuming the message was submitted to the Omtool server, what caused the delivery failure? The state and status of the message, along with details in the message journal, provide some important clues.

Start troubleshooting by trying to locate the message on the Omtool server.

- 1 Start the Administrator.
- 2 Go to **Omtool Server Administrator > [ServerName] > Messages**.
- 3 Look for the message in the In Process queue:
  - a Click **In Process**.
  - b View **All Items**.

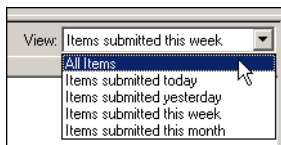


- c Sort all items by the date submitted.
  - d Look for the message.
- **Message found** - Double-click the message and then click the **Journal** tab to view the message journal to determine the current state and status of the message. Then monitor the components and confirm that the message is moving through the processing queues on the Omtool server. If the Omtool server stops processing the message (for example, the message seems to be stuck in a processing queue), restart all the Omtool services.



- **Message not found** - Go to step 4 and look for the message in the History queue.

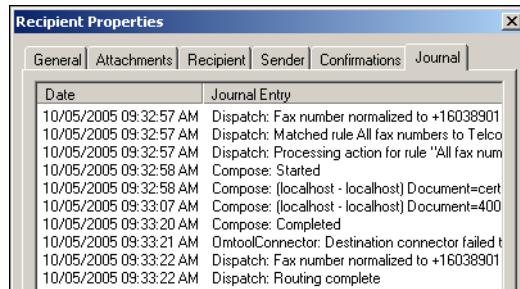
- 4 Look for the message in the History queue:
  - a Click **History**.
  - b View **All Items**.



- c Sort all items by the date submitted.

d Look for the message.

- **Message found** - Double-click the message and then click the **Journal** tab to view the message journal to determine the cause of the failure.



If the message failed, correct the issue and send the message again. Contact Omttool if you are unable to resolve the issue. (Go to [Omttool support and sales](#) on the inside front cover.)

If the journal states that Omttool server delivered the message but it still has not arrived at its destination, this indicates that the Omttool server transferred the message to the Litigation Support connector for Ringtail successfully. Do some advanced troubleshooting on the Ringtail Load Files folders to determine why the message is not being delivered to its destination. Contact Omttool if you are unable to resolve the issue. (Go to [Omttool support and sales](#) on the inside front cover.)

- **Message not found** - If the message is not found, the next step is to troubleshoot the multifunction device.

Continue to [Troubleshooting the multifunction device](#).

## Troubleshooting the multifunction device

After troubleshooting all other components in the workflow, troubleshoot the device. Consult the device manufacturer's documentation.

Continue to [Troubleshooting the client](#).

## Troubleshooting the client

If the device is working properly, try sending a message from the client to a recipient other than the Litigation Support connector for Ringtail. If you are able to send messages to recipients other than the Litigation Support connector for Ringtail and the Litigation Support connector for Ringtail is operating correctly, contact Omttool. (Go to [Omttool support and sales](#) on the inside front cover.)

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## Routing sheets do not display Ringtail destination

**Problem:** When you create a routing sheet with **Ringtail** as a recipient type, the routing sheet does not have the destination displayed.

**Solution:** The solution is to add the following variables `%PLUGIN_DESTINATION.1%` and `%PLUGIN_DESTINATION.2%`. These variables should be added to the following template files:

- `BatchRoutingSheet.doc`
- `BatchRoutingSheet-Simple.OMTPL`
- `RoutingSheet-Simple.omtpl`
- `Routingsheet.doc`

The template files are located in the `C:\Program Files\omtool\Omtool Server\Languages\ENU\EmbeddedDirectives` directory of the system running the AccuRoute server.