upland AccuRoute

AccuRoute® Clients
Installation Guide

upland AccuRoute

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Upland AccuRoute Resources

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Contents

Section 5: Required Server Configuration

Section 6: Required Configuration

Section 7: Optional Configurations

Section 8: Uninstallation

Section 9: Troubleshooting

Section 1: About this Guide

This *AccuRoute Clients Installation Guide* collects and explains the installation procedures as well as the required and optional configuration settings for the AccuRoute Clients.

This section includes:

Intended Audience

The *AccuRoute Clients Installation Guide* is primarily intended for administrators responsible for installation of the different AccuRoute clients.

AccuRoute Clients List

Organized by client name, the following table provides links to the relevant chapters for each AccuRoute client, including introductions, installation steps, server and client configurations, and optional configurations.

Table 1-1: **AccuRoute Clients Section Index**

Client Name	Section Links
AccuRoute Desktop	For Introduction, see AccuRoute Desktop (2-2) For Installation, see AccuRoute Desktop (4-1) For Server Configurations, see AccuRoute Desktop (5-2) For Required Configurations, see AccuRoute Desktop (6-2) For Optional Requirements, see AccuRoute Desktop (7-2)
AccuRoute Web Apps	For Introduction, see AccuRoute Web Apps (2-8) For Installation, see AccuRoute Web Apps (4-7) For Server Configurations, see AccuRoute Web Apps (5-8) For Required Configurations, see AccuRoute Web Apps (6-11)

Table 1-1: **(Continued)AccuRoute Clients Section Index**

Client Name	Section Links
Print to AccuRoute	For Introduction, see Print to AccuRoute (2-10) For Installation, see Print to AccuRoute (4-11)
AccuRoute Queue	For Introduction, see AccuRoute Queue (2-14) For Installation, see AccuRoute Queue (4-17) For Server Configurations, see AccuRoute Queue (5-11) For Required Configurations, see AccuRoute Queue (6-15) For Optional Requirements, see AccuRoute Queue (7-49)
AccuRoute Acquisition	For Introduction, see AccuRoute Acquisition (2-15) For Installation, see AccuRoute Acquisition (4-21) For Required Configurations, see AccuRoute Connect (6-16)
AccuRoute Connect	For Introduction, see AccuRoute Connect (2-19) For Installation, see AccuRoute Connect (4-24) For Server Configurations, see AccuRoute Connect (5-12) For Required Configurations, see AccuRoute Connect (6-16)
AccuRoute COM API	For Introduction, see AccuRoute COM API (2-22) For Installation, see AccuRoute COM API (4-27) For Required Configurations, see AccuRoute COM API (6-17)
Cost Recovery	For Introduction, see AccuRoute CostRecovery (2-26) For Installation, see AccuRoute Cost Recovery (4-29) For Required Configurations, see AccuRoute CostRecovery (6-19)
Server Monitor	For Introduction, see AccuRoute Server Monitor (2-28) For Installation, see AccuRoute Server Monitor (4-33) For Server Configurations, see AccuRoute Server Monitor (5-17) For Required Configurations, see AccuRoute Server Monitor (6-33) For Optional Requirements, see AccuRoute Server Monitor (7-51)
Fax Center	For Introduction, see AccuRoute FaxCenter (2-29) For Installation, see AccuRoute FaxCenter (4-35) For Server Configurations, see AccuRoute FaxCenter (5-20) For Required Configurations, see AccuRoute FaxCenter (6-36) For Optional Requirements, see AccuRoute FaxCenter (7-55)

Client Deployment Summary

To deploy any AccuRoute Client:

1   Verify that AccuRoute Server and the Client requirements have been met. (Go to Section 3: Requirements.)

2   Install the client of interest. (Go to Section 4: Installation.)

3   Make required server configurations on the AccuRoute Server. (Go to Section 5: Required Server Configuration.)

4   Apply required configurations that are necessary for your client (Go to Section 6: Required Configuration.)

5   Apply optional configurations that may be relevant for your client (Go to Section 7: Optional Configurations.)

Related AccuRoute v6.0 Documentation

For more information about AccuRoute v6.0 and other AccuRoute products, refer to the AccuRoute v6.0 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: Introduction

AccuRoute takes the guesswork out of document delivery. AccuRoute software is a versatile document messaging suite enabling users to send documents—electronic and hard copy—to multiple and varied destinations like document repositories, network printers, fax numbers, and email.

This section describes all the AccuRoute clients along with their interactions with each other and the AccuRoute Server.

This section includes:

AccuRoute Desktop

This section includes:

Introduction to AccuRoute Desktop

AccuRoute's unmatched routing capabilities are presented to the user as **AccuRoute Desktop**, an intelligent client-side application that resembles a desktop email client. Using AccuRoute Desktop, users can create Embedded Directives and Routing Sheets and use them to streamline their common document routing practices.

AccuRoute Desktop also features a desktop printer that generates PDF files and a Windows Send To shortcut; both invoke AccuRoute Desktop automatically, allowing the user to send documents that are already open on the desktop or saved on the network.

AccuRoute Desktop is the client-side desktop application that allows network users to:

- Create and save Embedded Directives (EDs). These EDs can be used to submit messages directly to the Upland AccuRoute Server and generate Routing Sheets.
- Generate Routing Sheets. The Routing Sheets can be placed in front of hard copy documents and the set can be scanned from a multifunction device and sent to the Upland AccuRoute Server for processing.
- Submit messages directly to the Upland AccuRoute Server without using an Embedded Directive.

Integration with DMS applications

AccuRoute Desktop supports Upland AccuRoute DMS Libraries v3.01 and later. The Upland AccuRoute DMS Libraries are a modular set of DLL files for document management systems and document repositories. They enable AccuRoute applications such as the AccuRoute Desktop to communicate with your company's document management system or other document repository. Specifically, the Upland AccuRoute DMS Libraries allow AccuRoute applications to authenticate users to the DMS application so that users can profile documents and save them in the DMS application.

Periodically Upland AccuRoute releases updates to the Upland AccuRoute DMS Libraries. Updates can include support for new document management applications and resolutions to issues in previous releases.

Methods of submitting messages to the AccuRoute Server

The highly intelligent Embedded Directive technology requires each message to be submitted directly to the Upland AccuRoute Server for processing and routing to the final destinations.

There are several ways messages can be submitted to the AccuRoute Server; each method is explained in the figure in the next page and in the following sub sections.

This section includes:

AccuRoute Web Apps (2-3)

AccuRoute COM API (2-3)

Network scanning devices (2-4)

Figure 2-1: **Methods of submitting messages to the Upland AccuRoute Server**
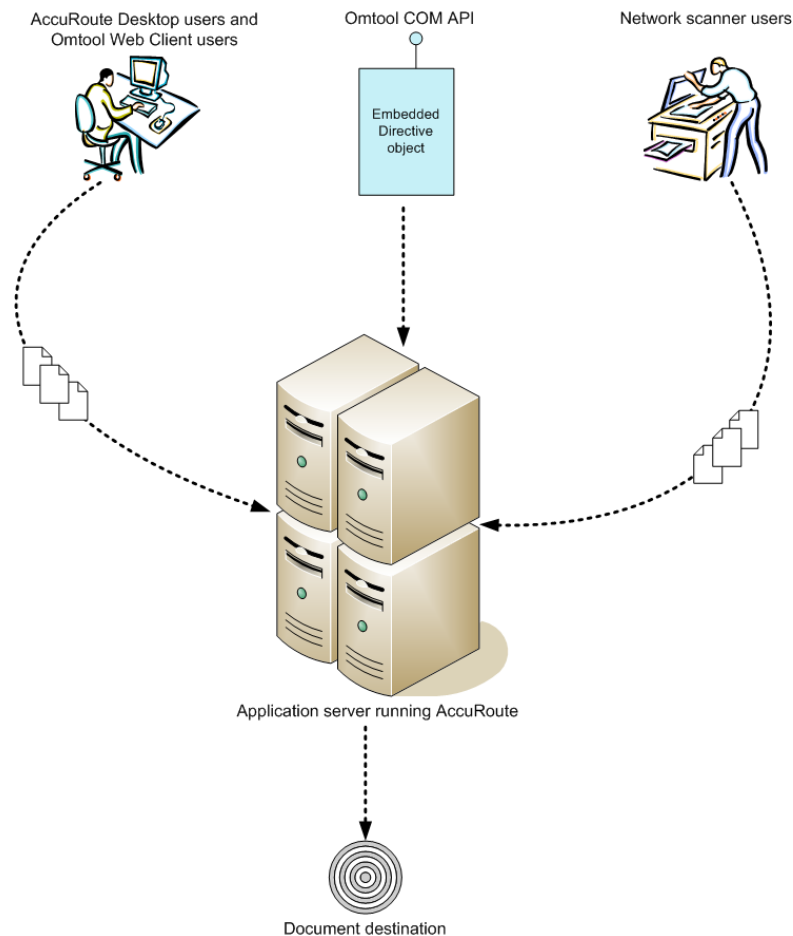
AccuRoute Web Apps

The AccuRoute Web Apps client is an intranet-based web application providing network users a convenient method of creating document distributions (Embedded Directives), generating Routing Sheets, and sending messages. For more information on AccuRoute Web Apps, refer to AccuRoute Web Apps (2-8).

AccuRoute COM API

AccuRoute COM API enables you to create Visual Basic applications that generate messages and Embedded Directives and submit them to the Upland AccuRoute Server. For more information, refer to AccuRoute COM API (2-22).

Network scanning devices

AccuRoute seamlessly converts any hard-copy document into searchable electronic format and delivers it as a message. A user simply scans the hard copy document with a Routing Sheet on a network scanning device, and the Upland AccuRoute Server does the rest.

A scanned document enters the AccuRoute system via AccuRoute Intelligent Device Client or an inbound connector. Specialized solutions are available for the industry's most common multifunction device models. For more information, refer AccuRoute Embedded Device Client Installation Guide.

Components of AccuRoute Desktop

The AccuRoute Desktop application consists of three components:

This section includes:

> Watch Folders application (2-4)
>
> AccuRoute Desktop (2-4)
>
> Print to AccuRoute printer (2-5)

Watch Folders application

This is an application that starts at Windows startup and has a tray icon. The application uses Virtual Filescan implementation and gathers files that are dropped in known/specified folders and then process them through the AccuRoute Server.

AccuRoute Desktop

AccuRoute Desktop resembles an email client application in which the user can choose recipients for a message and send it. In addition to this direct send capability, the AccuRoute Desktop user can save the message as an Embedded Directive, reuse saved Embedded Directives to send new messages, add or remove existing attachments, or use an Embedded Directive to generate a Routing Sheet. It is the core component of the application suite; it can be invoked by users, the Watch Folders application, and the Send To AccuRoute Desktop shortcut.

> **Note**   AccuRoute Desktop contains the configuration UI for the Watch Folders application.

Figure 2-2: **AccuRoute Desktop**
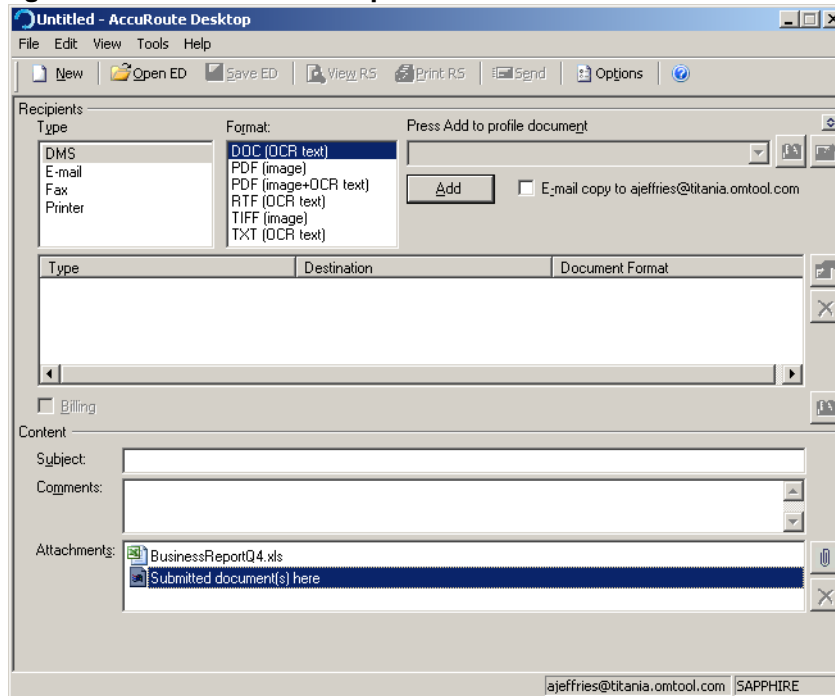
From the main window in AccuRoute Desktop, users can send messages, create Embedded Directives, and generate Routing Sheets.

Print to AccuRoute printer

AccuRoute Desktop v6.0 printing is handled by the Print to AccuRoute client. Print to AccuRoute allows users to print any document to the AccuRoute PDF printer, which makes a .pdf version of that document. Then the system opens the new .pdf file in the AccuRoute Desktop, where it is available to be sent to recipients or addresses, as with any other message. Print to AccuRoute lets users take advantage of AccuRoute messaging capabilities for file formats not otherwise supported. For more information, refer to <u>Print to AccuRoute</u> (2-10)

Workflows for messages and Embedded Directives

AccuRoute Desktop supports the following workflows:

- **Sending messages** - When AccuRoute Desktop submits a message to the Upland AccuRoute Server, the server queues it in the Dispatch component. The Dispatch component analyzes the Outbound rules and determines a message path through the Upland AccuRoute Server's processing queues. It directs the message to the appropriate workflow component where it is processed for delivery. After AccuRoute Desktop has submitted the message to the Upland AccuRoute Server, it can be tracked using the Upland AccuRoute Server Administrator.

- **Creating and updating Embedded Directives** - When AccuRoute Desktop creates a new Embedded Directive or updates an existing Embedded Directive, the Upland AccuRoute Server updates the Embedded Directive in the message database.
- **Generating and displaying Routing Sheets** - When AccuRoute Desktop creates a Routing Sheet or displays a previously generated Routing Sheet, it uses the Embedded Directive properties and the message attachments (send to when printing to AccuRoute Desktop or from the Send to Desktop shortcut) to compose a Routing Sheet on the desktop and display using the default PDF viewing application.

Views associated with AccuRoute Desktop features

A view is configuration file for an AccuRoute Desktop form. All three components of the AccuRoute Desktop application suite use forms. For example, AccuRoute Desktop uses the standard form that is linked to the view file Default.VIEW. Each view file is comprised of XML data that determines the look and feel of the application, and the features that are available to the user.

> *Tip*   Upland AccuRoute provides guidelines on modifying view files so that administrators or programmers can customize views for the target environment. For a fee, an AccuRoute Technical Support engineer can assist with view file modifications or customize view files for the target environment.

Do not modify any views before using AccuRoute Desktop**.** Use the application in its default configuration, generate a list of specifications for deployment, and then customize the application. View files are stored on the Upland AccuRoute Server and can be updated anytime—even after AccuRoute Desktop has been installed on clients.

Users can use custom views when running AccuRoute Desktop in standard mode.

- AccuRoute Desktop loads Default.VIEW by default. The view that AccuRoute Desktop loads is determined by the property prDefaultView in AccuRouteclient.xml. This property can be modified for individual users.
- Send To AccuRoute Desktop loads DirectSent.OMV which is located in …\AccuRouteViews on the Upland AccuRoute Server. The view can be modified as necessary, but it cannot be customized for different users and groups and cannot be moved to a different location.
- Printing a document to the AccuRoute watch folder loads the Default.VIEW. This view is determined by the watch folder configuration AccuRouteWatchFolder.xml which defaults to the Default.VIEW. Users can also modify this to be any view they want, PrintToFax.OMW, or even the PrintTo.OMV as necessary.

This section includes:

Views versus user preferences

Views always takes precedence over user preferences in AccuRoute Desktop. This allows administrators to use views to enforce user and group policies. (If a user sets preferences that conflict with the view, then the conflicting settings are not saved.)

Inheritance

A view can inherit configuration data from another view. Using this concept called inheritance, AccuRoute Desktop can be deployed with a hierarchal set of views that meet the needs of users and groups. In an environment that utilizes view inheritance, the view with the most general configuration data is called the **base view**, and the view that determines the AccuRoute Desktop configuration on the client is called the **derived view**. Any view that occurs between the base view and the derived view is called an **intermediate view**. For example, the view lineage can be comprised of the base view, multiple intermediate views, and the derived view.

While view inheritance can be used to propagate settings to other views, it provides versatility at the feature level. A view can override data that is inherited from another view. (Go to Overrides on 2-7.)

Two-view example

Consider the following example of view inheritance using two views:

- organization.view
- department.view

AccuRoute Desktop on the client is configured to load department.view. Since department.view inherits configuration data from organization.view, organization.view is the base view and department.view is the derived view.

Three-view example

Consider a more sophisticated example of view inheritance using three views:

- organization.view
- site.view
- department. view

AccuRoute Desktop on the client is configured to load department.view. Department.view inherits configuration data from site.view, and site.view inherits configuration data from organization.view. Department.view is the derived view, site.view is the intermediate view, and organization.view is the base view.

Overrides

A derived view can override data that is inherited from the base view. Conversely, the base view can allow or prevent the derived view from overriding all or part of the view configuration. (The attribute overridable can be set on the view itself, on general sections such as <General>, and on more specific sections such as <Recipient>. which belongs to the <Defaults> section.) This concept of overrides is detailed thoroughly in the next section that contains guidelines on modifying view files.

AccuRoute Web Apps

This section includes:

Introduction to AccuRoute Web Apps

AccuRoute Web Apps is an intranet-based web application that provides network users a convenient method of delivering documents. Web Apps is the customizable, tile-based AccuRoute client from which users can access Applications integral to their workflow.

The intuitive Web Apps Homepage presents the user with several application tiles, from which they can create Messages, work with Distributions and Files, and set preferences. The Application options available to user groups are defined in the System Administrator.

Figure 2-A: **AccuRoute Web Apps Client**
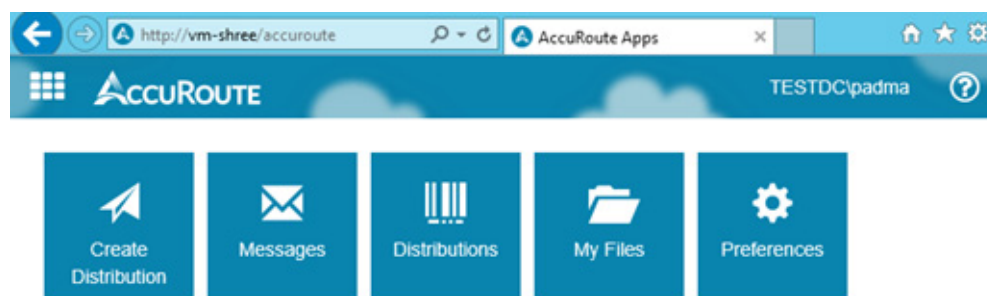
Messages and distributions

Users can send messages and distributions electronically and from hard copy. In both cases, the Web Apps Client delivers the document as an electronic file attachment using the recipient information.

- For messages and distributions sent electronically, users manually add a recipient or choose a distribution, select and add an attachment, review options and send. The system processes it using the associated routing information.

- For messages and distributions sent starting with a hard copy, users can print Routing Sheets to bring to an MFP with the document, or they can sign-in to the device and use the distributions associated with authenticated buttons on the device, such as Scan to Me.

For more information on messages and distributions, and exact steps for working with them in the Web Apps Client, see the AccuRoute Web Apps User Guide.

Distribution Collections

Users can create their own Distributions or make use of any Distribution Collections to which their user group is assigned in the AccuRoute Server. Users cannot edit an existing distribution within a Distribution Collection, but they can modify it and use Save As to generate a new one based on the original settings.

For more information on working with Distribution Collections, refer to the AccuRoute Web Apps User Guide.

Print to AccuRoute

This section includes:

Introduction of Print to AccuRoute Features

Print to AccuRoute allows users to print any document to the AccuRoute PDF printer, which makes a .pdf version of that document. Then the system opens the .pdf file in either the AccuRoute Desktop or Web Client, where it is available to be sent to recipients or addresses, just like any other message.

With Print to AccuRoute, users can take advantage of AccuRoute messaging capabilities for file formats not typically supported. The Print to AccuRoute installation offers choices:

- Print to AccuRoute Desktop
- Send to AccuRoute Desktop

Printing to AccuRoute Desktop

When printing a document to AccuRoute Desktop, save the document to the designated AccuRoute print watch folder (usually this is the `My Documents\AccuRoute` folder). Once the document is saved, it is automatically routed to AccuRoute Desktop as an attachment for a message. Here are the steps.

To print to AccuRoute Desktop:

1   Open a document.

2   Click **Print**. The **Print** dialog opens and the **Print to AccuRoute** printer is selected.
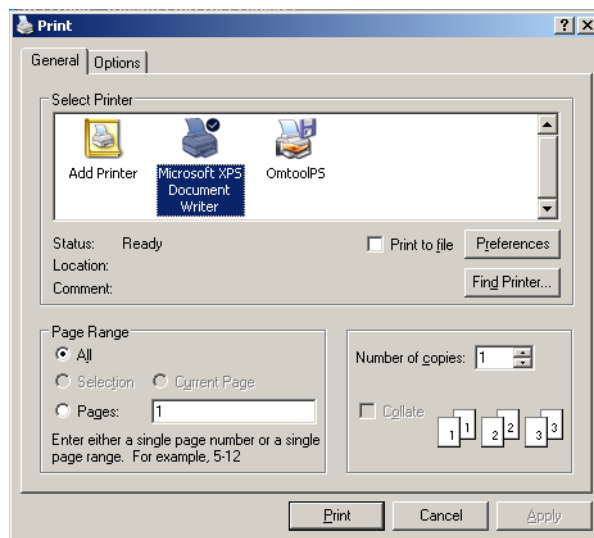
3 Choose the designated AccuRoute print watch folder as the location to save the file.

When the file is saved, the AccuRoute Desktop application is launched with the file as a PDF attachment.
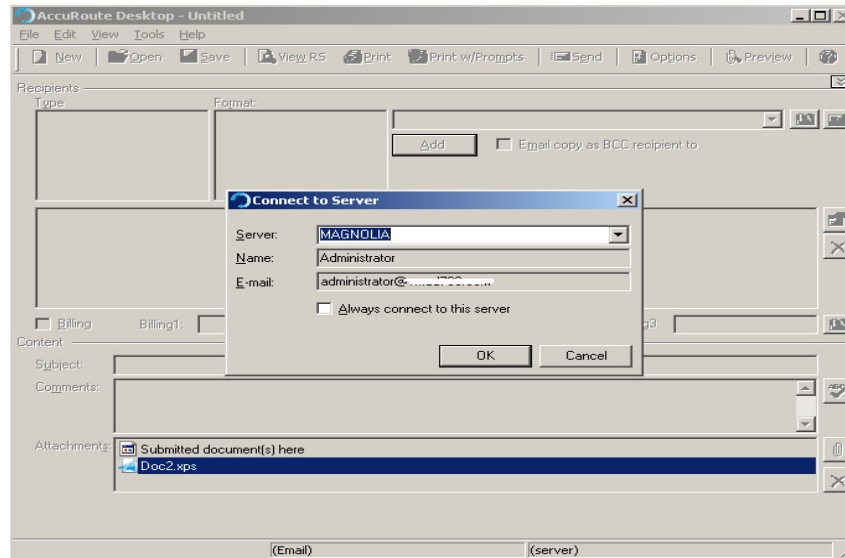
The user can send a message with the attachment or create an Embedded Directive with the attachment. The document will be submitted to the server which will convert to the requested final form.

Send To AccuRoute Desktop

The **Send To > AccuRoute Desktop** option is listed in the Windows Explorer right-click menu for files.
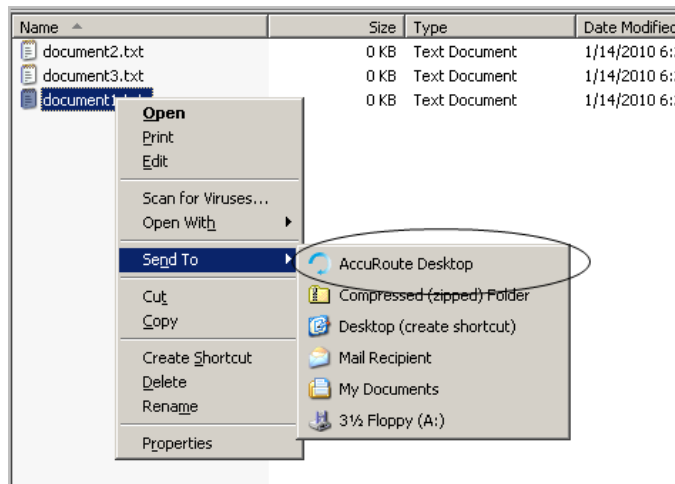
When the user sends a document to AccuRoute Desktop, a special form prompts the user to launch AccuRoute Desktop with the document attached or to immediately send the document using an existing Embedded Directive..
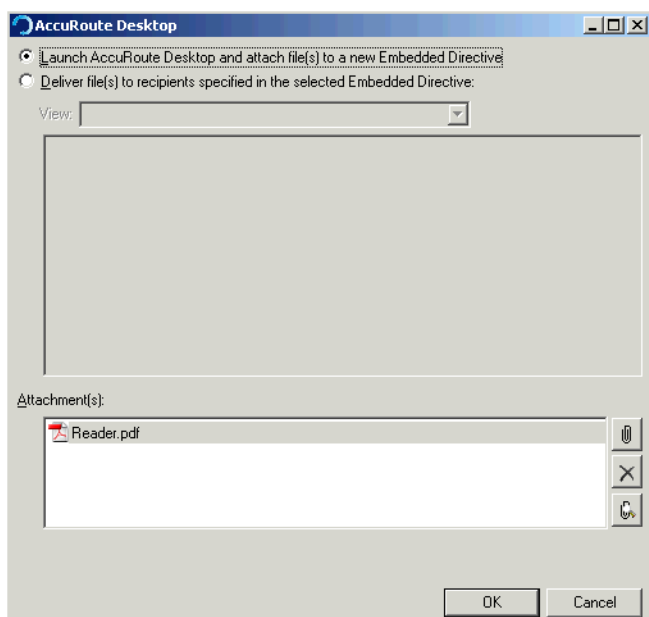
If the user sends the document using an existing Embedded Directive, AccuRoute Desktop sends the message immediately. If the user launches AccuRoute Desktop, the form appears on the desktop and the document is attached.
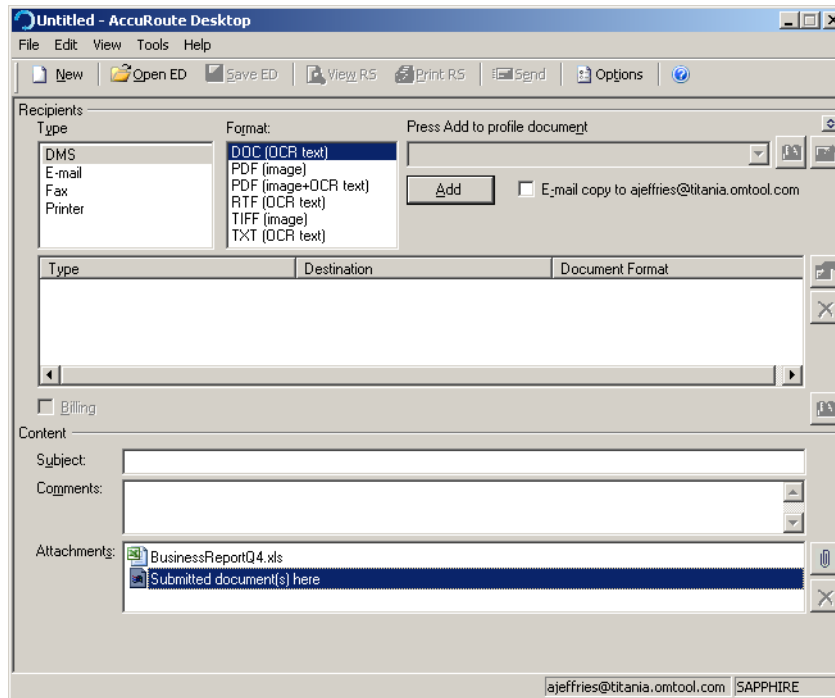
AccuRoute Queue

This section includes:

Introduction to AccuRoute Queue

AccuRoute Queue is a desktop component of Upland 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 AccuRoute Acquisition Client or as a component of an enterprise e-document delivery and management system. The advantage of using AccuRoute Queue is that it processes documents in a workflow bound for a document management system (or Object Archive™). For information on AccuRoute Queue and other AccuRoute products, see the AccuRoute v6.0 documentation home page.

Working with AccuRoute Queue

The AccuRoute 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 AccuRoute's AccuRoute Acquisition Client software or from a multifunction device. The Queues are pre-configured in the Upland AccuRoute Server Administrator where the Administrator assigns access rights and permissions to predefined user Groups.

When an AccuRoute 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 Upland AccuRoute Server Administrator).

AccuRoute Acquisition

This section includes:

Introduction to AccuRoute Acquisition

This section includes:

User Interface

The **AccuRoute Acquisition** client user interface is composed of a top menu bar, a tool bar, an image/page number pane, a PDF viewer pane and a status bar with the folder number. Often there are several ways to access common commands, which are all described under the relevant heading. Keyboard shortcut keys, when applicable, are given in parenthesis.
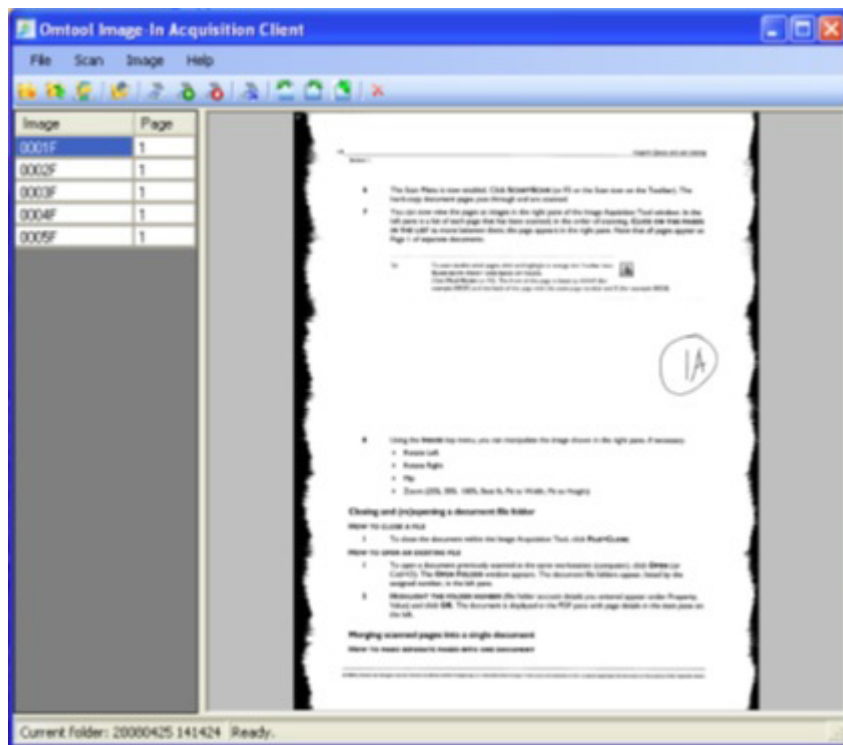
Top Menu Bar

This section includes:

File menu
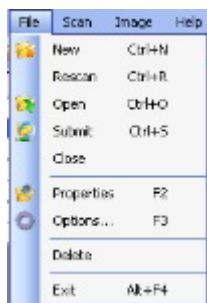
- New (Cntl+N) opens the Properties window and enables the Scan command
- Rescan (Cntl+R)
- Open (Cntl+O) an existing document
- Submit (Cntl+S) the document to IIQ
- Close the current document
- Properties (F2) displays the index window with Folder number, Medical record, and Account number.
- Options (F3) Note: This diagnostic should be enabled only at the request of tech support.
- Delete removes the folder and all images in it.
- Exit (Alt+F4) the application

Scan menu
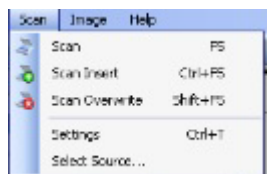
- Scan new images to the end of a folder.
- Scan Insert scans images and puts them before the selected image.
- Scan Overwrite scans new images and overwrites starting at the current image. (Also see Substituting a page in a
- document on 3-8.)
- Settings (or Cntl+T) for the scanner allows the choice of:
  - ❍ Color, Black & White or Grayscale, which may help with the quality of some problem documents
  - ❍ resolution in DPI
  - ❍ Duplex
  - ❍ Show scanner UI

- Select Source allows you to choose which scanner to use.

Image menu

- Merge/Split collects pages into a single document or subtracts them from an existing document. (Also see Merging scanned pages into a single document on 3-4.) and (Also see Splitting double-sided merged pages into individual pages on 3-7.)
- Swap Front/Back
- Delete (Cntl+Del) deletes the image selected.
- Rotate Left (Cntl+Shift+Left)
- Rotate Right (Cntl+Shift+Right
- Flip (Cntl+Shift+Down)
- Zoom (25%, 50%. 100%, Best fit, Fit to Width, Fit to Height)

Tool Bar Icons

- Create a new folder (Cntl+N) (Also see Scanning a document on 3-2.)
- Open a folder previously scanned on this workstation (Cntl+O) (Also see Closing and (re)opening a document file
- folder on 3-4.)
- Submit folder to AccuRoute Queue (Cntl+S) (Also see Submitting a document to IIQ on 3-9.)
- Display or modify folder properties (F2)
- Scan (F5) enters the image of the page into AccuRoute (Also see Scanning a document on 3-2.)
- Scan images and place them before the selected image (Cntl+F5) (Also see Substituting a page in a document on 3-8.)
- Scan new images, overwriting starting at the current image (Shift+F5) (Also see Substituting a page in a document on
- 3-8.)
- Scan both front and back of pages (Also see Scanning a document on 3-2.)
- Rotate the image 90 degrees counter-clockwise (Click+Shift+Left Arrow)
- Rotate the image 90 degrees clockwise (Click+Shift+Right Arrow)
- Flip the current image (Click+Shift+DownArrow)
- Delete the current image

Image/page number pane and PDF viewer pane
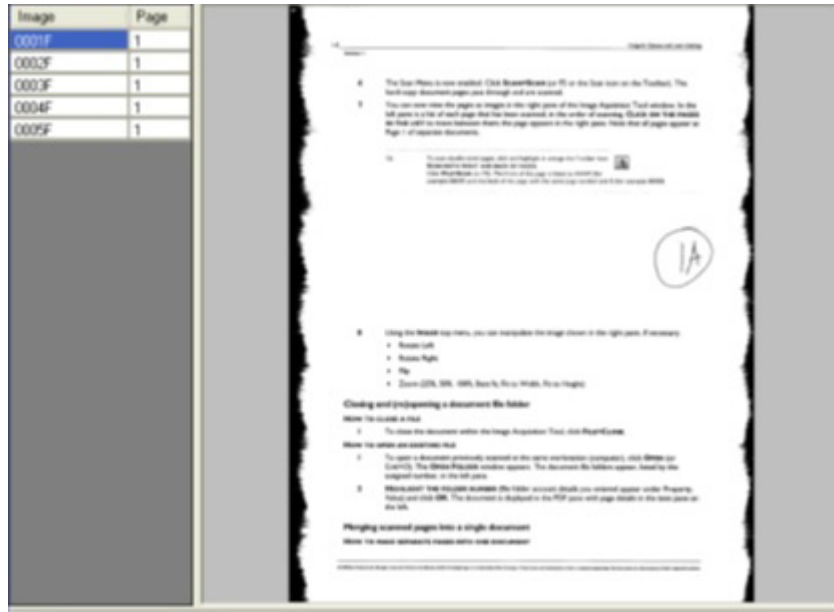
The image and page number pane lists the pages that have been scanned and gives information about their pagination in the document. The highlighted page can be viewed and manipulated in the PDF viewer pane.

Status bar
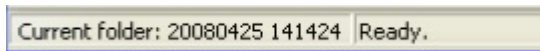
The status bar shows the folder number and current action.

AccuRoute Connect

This section includes:

Introduction to AccuRoute Connect

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

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

Working with AccuRoute Connect

The following example will give you an idea as to how AccuRoute Connect works. In this example, an Administrator needs to integrate the AccuRoute environment with a Human Resource application. This application contains employee demographic information like employee name, date of birth, email and or fax number, social security number etc. The purpose of the integration is to collect the employee metadata and use the information to create a Routing Sheet, and then use the Routing Sheet to route documents to a repository using the metadata values as indices.

The integration is easily configured using AccuRoute Connect where the Administrator simply creates an "Appspace" for the application (with mappings for all the demographic information fields as Xmodel elements) and installs the Appspace on the AccuRoute Server.

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

Thereafter, whenever an user brings up the application, the user is presented an AccuRoute icon in the title bar. When the user activates the icon, AccuRoute Connect opens, presenting the user with one or several of the AccuRoute Connect options. (The list of options the user can see, will depend on his configuration).

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

As soon as the user selects the "Create Routing Sheet" option, a Routing Sheet is generated using the metadata from the current contents of the fields that are mapped as Xmodel elements.

Description of the AccuRoute Connect features

❒ **Create Routing Sheet**

When the user selects the "Create Routing Sheet" option, a Routing Sheet is automatically generated using the metadata from the current contents of the fields that are mapped in the external application. The Routing Sheet can be used for capturing and routing of documents to the final destination using the values as indices. Since the Routing Sheet is automatically generated, this process does not require any data entry on the users part. Administrators however, can configure, to prompt the user for a relevant Routing Sheet name or users can use the default name if needed.

❒ **Create Scan Reservation**

When the user selects the "Create Scan Reservation" option, an Embedded Directive is automatically generated using the current contents of the fields that are mapped for collecting metadata. Once you save this, the Embedded Directive can be made available on a multi-function device for use.

This method of creating a scan reservation does not require any data entry on the users part. Additionally, the users do not have to save or print a Routing Sheet before walking up to a multi-function device to scan their document.

This feature provides the same basic capabilities as "Create Routing Sheet" option. However instead of generating a routing sheet, the system creates an Embedded Directive and make it available on a multi-function device.

❒ **View Linked Documents**

This feature allows the end user in an external application to search for and view all documents previously associated with a field mapped for metadata collection. It invokes the AccuRoute Web Client's direct search capability where the mapped field is used as the search criteria for finding related documents.

For example, if the end user is in the external application selects the View linked Documents option, and if the employee id is mapped field, then the user will be able to view all documents that were archived via the AccuRoute Web Client that are associated with the employee ID.

❒ **Open the AccuRoute Desktop**

In cases where more complicated or modified processing is required for document routing, the user will have the option to open the Routing Sheet in the AccuRoute Desktop Client.

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

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

❐ **Upload Documents**

When the user selects this option and if the documents being captured already exist electronically, the user has the option to upload the documents directly to the Upland AccuRoute Server for processing, bypassing the scanning step.

❐ **Link to IIQ**

The Link to Queue feature allows the user to apply the metadata from the external application to a job listed in the External Applications folder of the AccuRoute Queue application.

When the user selects the "Link to Queue" option in AccuRoute Connect, the Upland AccuRoute Workflow Integration Application page opens listing all jobs in the External Applications folder. The user can select a job, preview the associated document and click OK to apply the metadata from the external application to the job. The job moves from the External Applications folder of AccuRoute Queue application and matches the queue workflow rules to its final destination.

AccuRoute COM API

This section includes:

Introduction to AccuRoute COM API

The **AccuRoute COM API** is a standard application program interface that enables you to customize the functionality of your Upland AccuRoute solution and integrate it with your existing technologies.

The most common questions on the AccuRoute COM API are:

- **What kinds of functions does the AccuRoute COM API support?** The AccuRoute COM API supports many server functions, enabling you to write applications or scripts that can connect to the message server as an administrator or user; create messages; create Embedded Directives and Routing Sheets, and associate them with messages; submit messages to the message server; create users, delegates, recipients, and attachments; and more.
- **Who should use the AccuRoute COM API?** Users of the AccuRoute COM API should be experienced application developers familiar with COM applications and the Upland AccuRoute Server.
- **What information can I find in this documentation?** This documentation contains requirements and installation instructions, a description of the objects and their relationships, a complete listing of the properties and methods for each object, information on using the Sample project, a complete list of error codes, examples of functions, and a list of additional resources including documentation and technical support.
- **How do I get started?** Install the AccuRoute COM API, run the modules in the Sample project, and review the code examples in this documentation.

Working with the Upland AccuRoute Server

The Upland AccuRoute Server, the centerpiece of any AccuRoute implementation, is an enterprise document routing solution that integrates with existing mail systems; document management systems and records management systems; multifunction devices and other network hardware such as fax machines, scanners, and copiers; enterprise database applications; and other enterprise business applications.It accepts inbound messages through numerous connectors and directly from client applications, and delivers outbound messages through its connectors to recipients and destinations. All messages are subject to rules, which determine the path of each message through the server's processing components. Each message has a journal where the server enters all the actions it has taken on the message.The server maintains a set of user defaults, which are settings and permissions that apply to unknown users, and a database of registered users, which represents known users that have unique settings and permissions. Users can have delegates, assistants, and printers assigned to them, and can also be subscribed to preview, approval, or review for messages they send.

This section includes:

Embedded Directives

Upland AccuRoute first introduced the concept of using the Embedded Directive to route messages. The Embedded Directive, an encoded key, represents a set of routing instructions.

Embedded Directives are created using the AccuRoute COM API, the AccuRoute Client, and the Upland AccuRoute Web Client. Once users begin creating Embedded Directives, the highly intelligent Upland AccuRoute Server can apply an existing Embedded Directive to messages, scan messages to detect an Embedded Directive on a Routing Sheet, and apply user-specified Embedded Directives to messages.

When an Embedded Directive has been associated with a message, the Upland AccuRoute Server's Embedded Directive Manager component decodes the Embedded Directive and retrieves the routing instructions for the server. A single Embedded Directive can be used repeatedly to streamline common document routing practices, can be configured to expire after a particular date and time, and can be associated with individual users or a user account that a group of users can access.

Routing Sheets

The Routing Sheet is a cover sheet for a message that contains an Embedded Directive. Users can scan documents with Routing Sheets, and using the AccuRoute COM API, you can create messages and attach Routing Sheets.

The Routing Sheet serves two purposes:

- It contains the Embedded Directive, the encoded key that represents the routing instructions for the message.
- It functions as a cover sheet for the message. Depending on the message settings, the Routing Sheet accompanies the message to its final destination or is removed once the server decodes the Embedded Directive on it. Routing Sheets are so versatile that even users outside your company can send documents that contain Routing Sheets to your company and know that these documents are delivered reliably to the appropriate recipients and destinations.

Messages

Messages is a general term used to describe jobs on the server:

- **An inbound or outbound message associated with an Embedded Directive.**
  - Example of an inbound message - Someone outside your company sends a message via e-mail or fax to someone inside your company. The message includes a Routing Sheet that contains an Embedded Directive. (In this instance, the server must be configured appropriately to identify inbound messages with Routing Sheet, decode the Embedded Directive, and deliver the message to the recipients and destinations indicated by the Embedded Directive.)
  - Example of an outbound message - A user sends a message that includes a Routing Sheet through e-mail, a network scanner or copier, or Filescan. (In this instance, the server must be configured appropriately to identify outbound messages with Routing Sheets, decode the Embedded Directive, and deliver the message to the recipients and destinations indicated by the Embedded Directive.)
- **An outbound message submitted to a connector.**
  - Example - A user copies a message to a Filescan folder in the local area network. The Filescan connector on the server retrieves the message. Then the Upland AccuRoute Server prepares and delivers the message according to the routing instructions in the control file. (In this instance, the server must be configured appropriately to process messages through Filescan.)

- **An inbound or outbound fax.**
  - ○ Example of an inbound fax - Someone outside your company sends a fax to someone inside your company. The server, in a typical configuration, queries your company's address book using the DID number or DTMF digits associated with the inbound fax, obtains the e-mail address of the recipient, and routes the fax to the recipient. (In this instance, the server must be configured appropriately to process and deliver inbound faxes.)
  - ○ Example of an outbound fax - A user sends a fax to someone outside your company. The server prepares the message and routes it to the Telco connector. Then the Modem Server manages the delivery of the fax. (In this instance, the server must be configured appropriately to process and deliver outbound faxes.)

AccuRoute COM API objects

The AccuRoute COM API supports the following objects:

- **EmbeddedDirective** object - Represents an embedded directive. (An embedded directive is an encoded key that represents a set of routing instructions.)
- **EmbeddedDirectiveTemplate** object - Represents a routing sheet template.
- **Message** object - Represents a message on the Upland AccuRoute Server. (A message has at least one recipient or destination and at least one attachment.)
- **MessageAttachment** object - Represents a file attachment to a message.
- **MessageRecipient** object - Represents the recipient or destination of a message.
- **MessageServer** object - Represents the message server.
- **RecipientJournal** object - Represents the message journal. (The message journal is a log of events pertaining to the message; each time the server acts on a message, it adds an event to the journal and indicates whether the action was successful. If the action failed, the description of the event usually indicates the reason for the failure.)
- **ServConnect** object - Represents a connection to the message server.
- **User** object - Represents a user within your organization.
- **UserDelegate** object - Represents a delegate. A delegate is a user who can manage the messages of another user, and/or send messages on behalf of another user.

Figure 2-2: **AccuRoute COM API objects and their relationships**
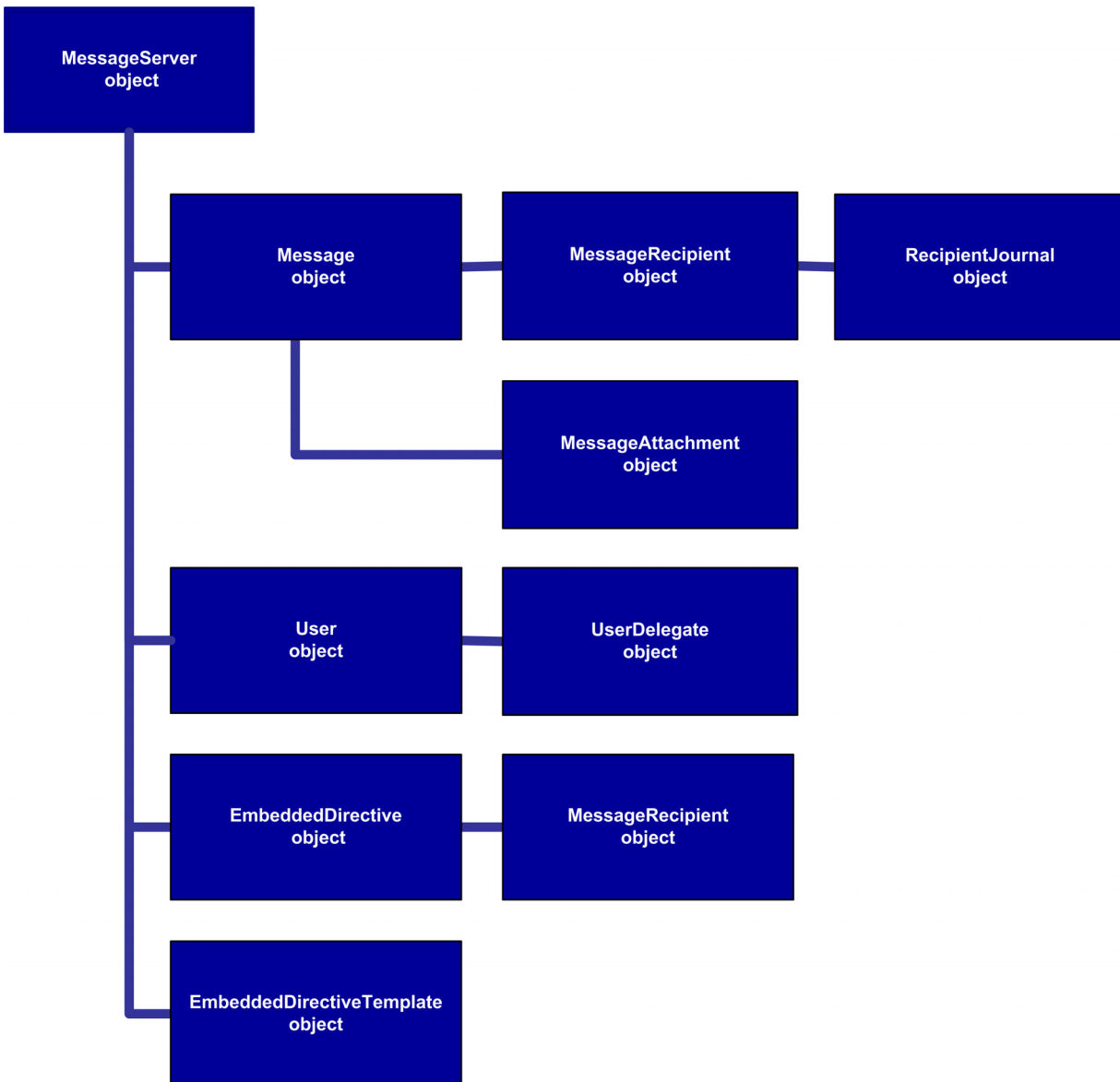
The MessageServer object exposes the Message object (which exposes the MessageRecipient object and the MessageAttachment object), the EmbeddedDirective object (which exposes the MessageRecipient object), the EmbeddedDirectiveTemplate object, and the User object (which exposes the UserDelegate object).

AccuRoute CostRecovery

This section includes:

Introduction to AccuRoute CostRecovery

AccuRoute CostRecovery is a stand-alone application for AccuRoute that extracts information from Upland AccuRoute Server applications for billing purposes. AccuRoute CostRecovery creates a file that contains the information extracted from the Upland AccuRoute Server database. You can post this file to your billing system, which enables your company to bill the appropriate client for message transactions such as copying or scanning documents, if your company uses AccuRoute CostRecovery with AccuRoute.

> **Note** This manual includes information about using AccuRoute CostRecovery with AccuRoute. When you install AccuRoute CostRecovery, it is customized with information specific to the Upland AccuRoute Server application you use. For this reason, some of the images of AccuRoute CostRecovery screens displayed in this manual will not necessarily exactly match what you see when you run AccuRoute CostRecovery. The appropriate Upland AccuRoute Server-specific images or procedures are provided where necessary to enhance your understanding of the program.

AccuRoute CostRecovery and AccuRoute integrate with Xerox® Office Software. This enables users to scan paper documents to a computer network and route them to one or more destinations. A user creates a cover sheet that contains sender information, recipient information, and instructions. From a Xerox Document Centre, the user scans the cover sheet along with a paper document to the Xerox FlowPort server. Following the instructions on the cover sheet, FlowPort software routes the document to designated locations on the server. AccuRoute server software then processes and forwards the document to one or more of the following destinations: an e-mail service or a document management system.

For more information about any of these messaging solutions, contact Upland AccuRoute or refer to the documentation that accompanied the product you are using with AccuRoute CostRecovery.

CostRecovery Features

AccuRoute CostRecovery features include:

- The ability to collect message or document transactions from the message database in AccuRoute.
- Customizable templates to design the format of the extracted information to meet the needs of your billing system.
- The ability to price by page for faxes and e-mail messages, and to assign different prices for the first page and all additional pages, and to add a maximum price for any given message.
- The ability to price local, long distance, and international calls differently, and to assign a maximum cost for each type of call.
- The ability to price by page for copies, scanned documents, and storage of documents in a document management system with AccuRoute.

- The ability to schedule AccuRoute CostRecovery to run automatically on a daily basis.
- The ability to parse partial strings from billing codes and to remove leading zeros from numeric billing codes.

AccuRoute Server Monitor

This section includes:

Introduction to AccuRoute Server Monitor

AccuRoute Server Monitor is a stand-alone application that monitors various components of an Upland AccuRoute Server. It executes custom-created tests to detect workflow bottlenecks and system failures.

Conditions that can be monitored include the size of the message database, available disk space on the AccuRoute Server, the size of Send and Receive folders, the status of AccuRoute services, and the status of connectors. Additionally, with its versatile monitoring capabilities, AccuRoute Server Monitor runs test in specified frequencies; maintains a suspend schedule; supports custom actions for each test which can include sending e-mail notifications, writing entries to the event log, and changing the status of AccuRoute services; supports custom e-mail addresses for the source and destination of notification messages; and monitors Upland AccuRoute Server clusters.

AccuRoute Server Monitor consists of:

- **AccuRoute Server Monitor Administrator** - A snap-in to the Microsoft Management Console, the Administrator plays two essential roles. First, it serves as the user interface where you create "tests" for each Upland AccuRoute Server you monitor. (Each test consists of criteria and at least one action.) Second, the Administrator connects to the AccuRoute Server Monitor Service. Because the AccuRoute Server Monitor Administrator can run on a different system than the AccuRoute Server Monitor Service, you can manage your server monitoring methods from another Windows system in the local area network, including your desktop.

- **AccuRoute Server Monitor Service** - This Windows service performs all monitoring activities from a high-availability server. It logs on to the Upland AccuRoute Server using the Upland AccuRoute Server account, which has DCOM access and launch permissions on the Upland AccuRoute Server, and then executes the tests created in the Administrator.

AccuRoute FaxCenter

This section includes:

Introduction to AccuRoute FaxCenter

FaxCenter is a fax routing application. While many inbound faxes will be routed directly to recipients in your company, there are instances when someone needs to review an inbound fax, determine its most appropriate recipient or destination, and send the fax to that recipient or destination. FaxCenter offers this ability.

The FaxCenter and server routing rules help you to set up an inbound routing rule that determines which faxes need to be reviewed and routed to the appropriate recipients and destinations. When these inbound faxes arrive at the server, they are routed to FaxCenter users. FaxCenter users determine the most appropriate recipients and destinations for each fax and route faxes accordingly.

As you follow the procedures in this guide, you will:

- Install FaxCenter on client systems.
- Add FaxCenter users to Registered Users in the Administrator and give them permissions to run FaxCenter and use the appropriate features.
- Set up inbound routing rules on the server that determine which faxes get routed to FaxCenter.

Once you have completed these steps, FaxCenter users can route faxes to e-mail recipients, fax machines, network printers, and document management systems. They may also be able to release outbound faxes in Registration Pending to secure destinations.

Section 3: Requirements

This section includes:

Server requirements

This section includes:

AccuRoute Server v6.0 requirements

> **Note** You can install the Web Apps Client on the system running the AccuRoute server. If you install the Web Apps Client on a system that is not running the AccuRoute server, you must configure DCOM permissions so that the Web Apps Client server can access the AccuRoute server DCOM objects.

Basic client hardware requirements

- ❐ Pentium®-class processor, 400 MHz or faster
- ❐ 20 GB hard drive with a minimum of 50 MB free space
- ❐ 128 MB RAM
- ❐ Microsoft Windows 2012 x64, Windows 2012 R2 x64, or Windows 2016 x64
- ❐ Internet Information Services IIS v8 (Windows component) with Internet connection

> **Note** NOTE: For IIS v7 or later, configure to allow Active Server Pages. This configuration is located in the Web Service Extensions node in the IIS console tree.

  ▸ Microsoft .NET Framework v4.0 redistributable package

    ▸   Microsoft Internet Explorer 11or later, Chrome, Edge, Firefox, or Safari for Mac v6.2.8 or later

> **Note**   Internet Explorer 11 support requires the compatibility view be disabled. For steps to do so, see Disabling Compatibility Mode in Internet Explorer 11 (4-2).

❒   Acrobat® Reader® 9.x / 8.x / 7.x

❒   An image viewer compatible with your operating system

> *Important*   AccuRoute Desktop has been qualified with Windows Terminal Services and Remote Desktop Connection.

DCOM permissions when installing on a remote system

When you install the AccuRoute Clients on a remote system, you must configure the DCOM permissions on the AccuRoute server. Without this configuration, the AccuRoute server cannot communicate with the remote clients. For configuration instructions, see Configuring server-client connectivity methods (5-3)

HTTP or HTTPS connectivity for AccuRoute Intelligent Device Client

AccuRoute Desktop v6.0 supports the following methods of server-client connectivity: DCOM, HTTP, and HTTPS. Additional requirements apply for HTTP and HTTPS: For contivity instructions, see Implementing connectivity methods (5-4)

> *Important*   AccuRoute v6.0 installs the AccuRoute Intelligent Device Client as part of the server install. No separate client installation is necessary.

❒   For HTTPS connectivity only - Windows component Certificate Services must be installed on the system running AccuRoute Intelligent Device Client and a CA certificate must be configured for the Default Web Site in IIS.

❒   For Windows 2008 R2 SP2 64-bit servers only - Allow Dynamic RPC for the local port 135.

Note about connecting AccuRoute Server installed on Windows

To allow AccuRoute Clients to connect to AccuRoute Server running on Windows:

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.

Supported email applications

AccuRoute Desktop can integrate with the address book in the following email applications:

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

❒   Notes 6.5/6.0/5.0

❒   Novell GroupWise 6.0/5.5

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

Client requirements

The AccuRoute clients have specific following additional requirements.

This section includes:

[AccuRoute Web Apps](#) (3-4)

[Print to AccuRoute](#) (3-5)

[AccuRoute COM API](#) (3-5)

[AccuRoute Server Monitor](#) (3-6)

The following AccuRoute clients do not require any specific additional requirements.

- AccuRoute Destop
- AccuRoute Queue
- AccuRoute Acquisition
- AccuRoute Connect
- AccuRoute Cost Recovery
- AccuRoute FaxCenter

AccuRoute Web Apps

This section includes:

[AccuRoute Web Apps user requirements for email account](#) (3-4)

[AccuRoute Web Apps user full permission requirements](#) (3-5)

AccuRoute Web Apps user requirements for email account

The Web Apps Client users must have an email account created for them using the mail server (Microsoft Exchange Server).

Important	The mail server for any email account created must be installed on the same domain on which the AccuRoute server is installed.

This is necessary because the Web Apps Client queries the Active Directory attributes like "mail" and "proxyAddresses". The "proxyAddresses"attribute is added to the Active Directory properties only if an Microsoft Exchange Server is installed in the same domain as the Active Directory.

AccuRoute Web Apps user full permission requirements

Important	Full permissions to the Web Apps installation folder is required for all domain users (including the application pool account user) when Web Apps is installed to a non-default location with a custom virtual directory name.

Print to AccuRoute

The system where you install one of the Print to AccuRoute v6.0 options must meet the following requirements:

- **Print to AccuRoute Desktop** requires AccuRoute Desktop v6.0.
- **Print to AccuRoute Web Client** requires AccuRoute Web Apps v6.0.

AccuRoute COM API

Components installed by the AccuRoute Intelligent Device Client setup

Install the AccuRoute Intelligent Device Client on the system where you intend to run the applications you create. The system must meet the following requirements:

- Microsoft Windows 2012 x64, Windows 2012 R2 x64, or Windows 2016 x64
- Service account for the AccuRoute server must have Distributed COM access permissions on the system where you install the AccuRoute Intelligent Device Client and run applications. (This is the user account you used to install the AccuRoute server. It is the logon account for all Om* services.)
- Must be in the same domain as the AccuRoute server or in another domain that has a bidirectional trust with the server's domain.
- Any other resource requirements necessary to support the applications you create.

AccuRoute Server Monitor

This section includes:

AccuRoute Server Monitor Service

The system where the AccuRoute Server Monitor Service is installed must meet the following minimum requirements:

❐ Windows NT domain computer that always runs in the same domain as the AccuRoute Server and is not a domain controller, an AccuRoute Server, or a remote server

❐ Pentium III-compatible processor; 1 GHz; 512 MB RAM; 20 GB available hard disk space; CD-ROM drive; and Microsoft mouse or compatible pointing device

❐ Microsoft Windows 2012 x64, Windows 2012 R2 x64, or Windows 2016 x64

❐ IIS configured for SMTP mail delivery

❐ Exchange System Administrator (required only for Exchange monitoring)

AccuRoute Server Monitor Administrator

The system where AccuRoute Server Monitor Administrator is installed must meet the following minimum requirements:

❐ Windows NT domain computer that belongs to the same domain as the AccuRoute Server

❐ Pentium III-compatible processor; 1 GHz; 512 MB RAM; 200 MB hard disk space; CD-ROM drive; and Microsoft mouse or compatible pointing device

❐ Microsoft Windows 2012 x64, Windows 2012 R2 x64, or Windows 2016 x64

❐ AccuRoute service account or another account that belongs to the AccuRoute Admins group on the AccuRoute Server.

Section 4: Installation

This section describes the installation steps of the AccuRoute clients.

This section includes:

AccuRoute Desktop

This section includes:

About the AccuRoute Desktop Components

The **AccuRoute Desktop** setup installs the AccuRoute **Desktop Client** and the **Watch Folder** application. The installation will set the Watch Folder application to start on Windows startup, and will automatically start when installation is complete.

Installing AccuRoute Desktop

Note If your AccuRoute Client version is older than v5.0, it is removed and AccuRoute Desktop v6.0 is installed when you run the setup. You can install the AccuRoute Desktop on the AccuRoute Server or the client system. In previous versions, the install created a Post Script printer that was used to convert the printed document to PDF. In this version, the install will no longer create a printer. All printing will go through the Print to AccuRoute client, which can be found on the AccuRoute server system\ clients directory.

To install AccuRoute Desktop:

1 Log on to the system using an account that belongs to the local Administrators group.

2 Navigate to the Clients directory containing the setup files.

3 Click `setup.exe`. The InstallShield wizard configures your system and the **Welcome** message appears.
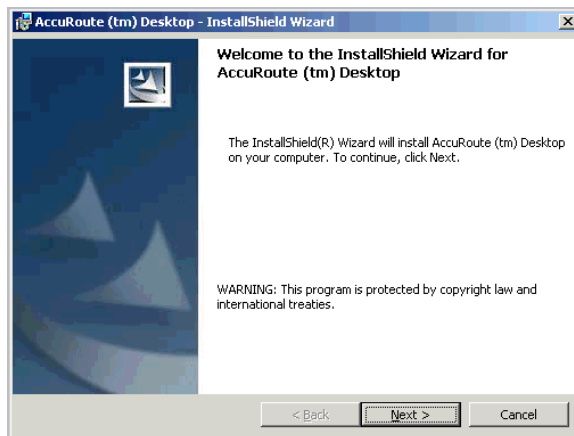
4 Click **Next**. The **License Agreement** screen appears.

5 Read the agreement carefully and if you agree to the terms, click **Yes**.

The **Choose Destination Folder** screen opens. The default destination is `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteDesktop`.

6   To accept the default, click **Next**. Otherwise, click **Change**. If you want to install in a non-default location, click **Browse** and then select a location. Then click **Next**.
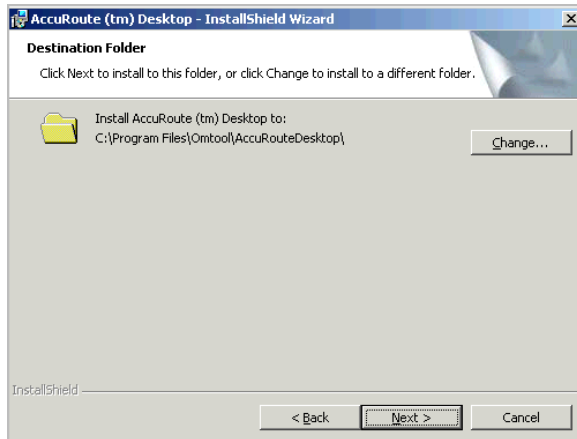
7   The **Ready to Install the Program** screen opens.
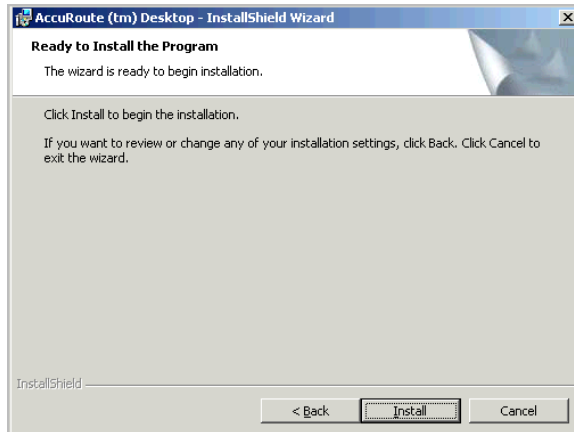
8   Click **Install** to begin the installation.

When installation is complete, you see the **InstallShield Wizard Complete** message.
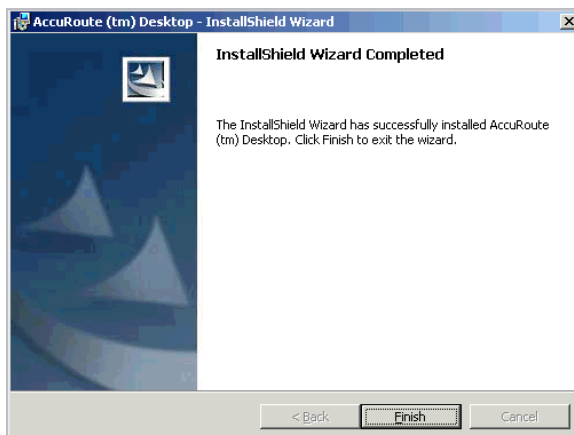
9   Click **Finish** to close the wizard.

10 Check the version of the AccuRoute Desktop client you installed. It should be **AccuRoute Desktop v6.0**.

View files installed with AccuRoute Desktop

Any `*.VIEW` file that resides in `...\AccuRouteViews` or in search folders appears in the View menu in AccuRoute Desktop and allows users to change views on demand. (This statement assumes that the View menu in AccuRoute Desktop is visible to users and that the particular search folder is defined for the view.)

All `*.OMV` files are invisible to AccuRoute Desktop, so they cannot be displayed as view options in the AccuRoute Desktop View menu. (These views are reserved for special applications, such as the Send To AccuRoute Desktop feature and printing to AccuRoute Desktop and are not designed for general purposes.)

The following view files are installed on the AccuRoute server and reside in `...\AccuRoute\AccuRouteViews`:

- `Default.VIEW` - View that AccuRoute Desktop loads on startup in standard mode.

Important	Do not delete, rename, or move this file. It is required for AccuRoute Desktop to work correctly.

- `DirectSend.OMV` - View that AccuRoute Desktop loads when the user sends a document to AccuRoute Desktop using the Send To AccuRoute Desktop shortcut in Windows.
- `Print To.OMV` - View that can be optionally used when a user prints a document to the AccuRoute Desktop. By default when printing to the AccuRoute Desktop, the default.view is used.
- `AccuRoute Client-Safe.OMV` - Backup copy of Default.VIEW. **Do not modify this file**.

The **\AccuRouteViews** folder also contains the following files:

- `DMSAssignDistribution.OMV`
- `DMSCreateRS.OMV`
- `DMSCreateRS-ReScan.OMV`
- `DMSPrompt.OMV`
- `PrintToFax.OMV`
- `PrintWithPrompts.OMV`

Figure 4-A: **View menu in AccuRoute Desktop**

The **View** menu, which allows the user to change the current view, includes the default view (**Default**) and custom views (**AllUsers**, **Managers**, **MarketingUsers**, **SalesUsers**, and **SuperUsers**).
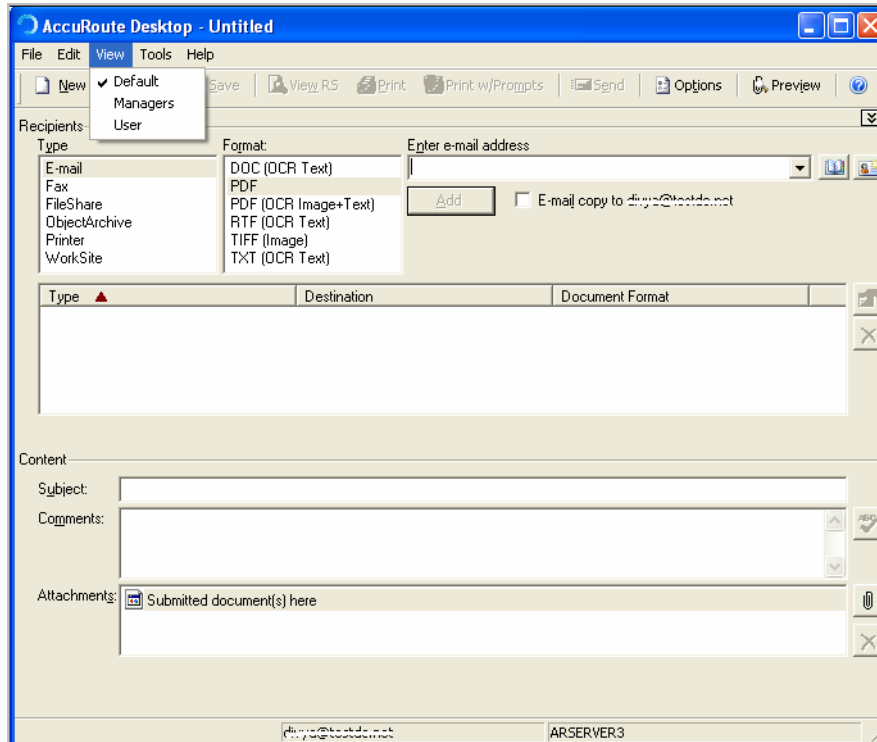
Running AccuRoute Desktop setup in silent mode

To run the AccuRoute Desktop setup in silent mode:

1 Log on to the AccuRoute server with an account that belongs to the Administrators group, for example, a member of the Local Admins group.

2 Open a command prompt.

3 Change the current directory to the one containing the setup files. The default location is `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteDesktop`.

Note On 64 bit systems, the setup files are located in the `C:\Program Files (x86)\UplandAccuRoute\AccuRoute\Clients\AccuRouteDesktop directory`.

---

4 To install AccuRoute Desktop 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)\UplandAccuRoute\AccuRoute\Clients\AccuRouteDesktop`.

> **Note** For 64 bit systems, the path is `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteDesktop\setup.exe`

6 To install AccuRoute Desktop in another system, run: `setup.exe /s /v"/qn"`

This installs AccuRoute Desktop to the default location: `C:\Program Files\UplandAccuRoute\AccuRouteDesktop`.

> **Note** To install AccuRoute Desktop for all users in silent mode, see Installing AccuRoute Desktop for all users in silent mode (4-7)

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 `J:\Program Files\UplandAccuRoute\AccuRouteDesktop`, then the short path is `J:\PROGRA~1\UPLANDACCUROUTE\ACCURO~1`.)

> *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`.

8 Verify that AccuRoute Desktop is installed on the client by navigating to `...\UplandAccuRoute\AccuRouteDesktop` on the client and verifying that the AccuRoute Desktop program files are installed.

Installing AccuRoute Desktop for all users in silent mode

To install AccuRoute Desktop for all users in silent mode:

1 Start by following the instructions in Running the AccuRoute Desktop setup in silent mode (4-6).

2 In step 4, where you run the setup file, add the following argument `ALLUSERs=2`:

`setup.exe /s /v"/qn ALLUSERS=2`

> **Note** The ALLUSERS argument is required in order for the install to complete successfully. If you do not use this argument, and you log into the system using a user credential that is different than one who ran the install, the AccuRoute Desktop does not show in Add/Remove Program list.

3 Sign in as a different user and verify that AccuRoute Desktop is listed in **Start> All Programs > Add/Remove programs**.

AccuRoute Web Apps

This section includes:

About the AccuRoute Web Apps components

The **AccuRoute Web Apps** client setup:

- Installs the Web Apps client program files.

- Creates a virtual directory in IIS.

- Configures IIS authentication.

- Configures Web Apps with the AccuRoute server location, the mail system identity and location.

Installing AccuRoute Web Apps

To install AccuRoute Web Apps:

1 Log on to the system where the **Web Apps** client is being installed using an account that belongs to the local Administrators group.

2 Navigate to a network folder `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteWebApps` directory of the system running the AccuRoute server containing the **Web Apps** client setup files and run `setup.exe`. The InstallShield Wizard opens to the **Welcome** screen.

3 Click **Next** to begin the installation process.
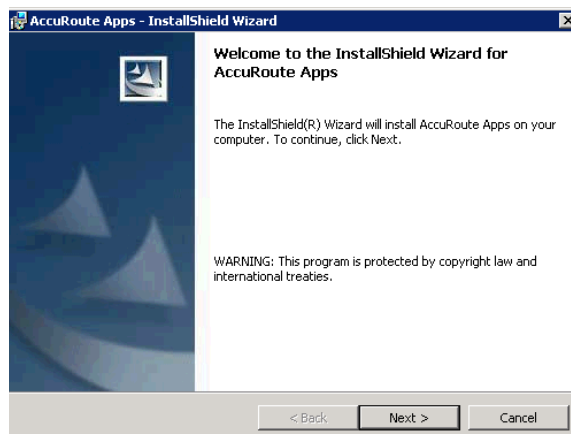
> *Tip*   The Web Apps Client setup is included with a complete AccuRoute Server installation in `\Program Files (x86)\UplandAccuRoute\AccuRoute\Clients\Web Apps`. Immediately following the AccuRoute Server installation, only the AccuRoute service account has permissions to access client setup programs on the AccuRoute server, but additional users can be granted permissions if necessary.

The **Destination Folder** screen appears.
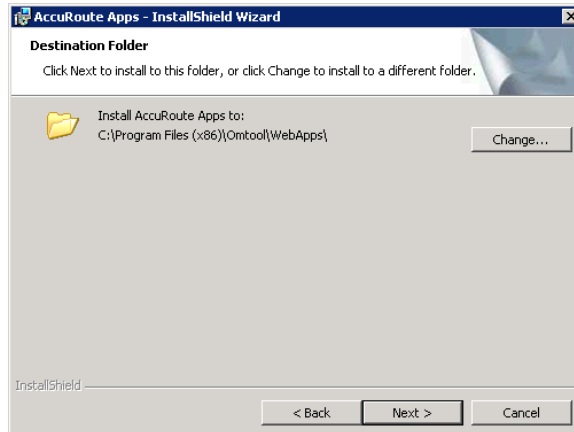
4   If you need to change the destination folder, click **Change** and follow the prompts. Then click **Next**.
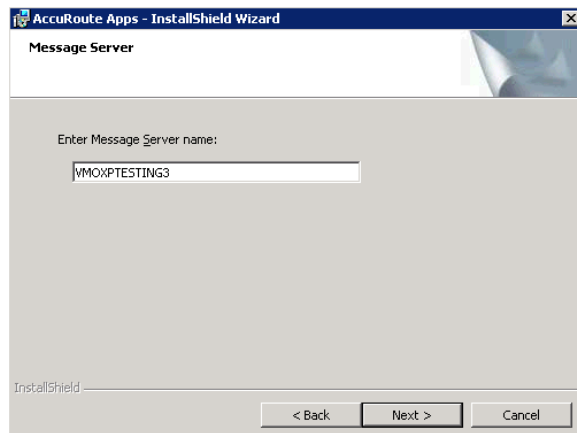
The **IIS Virtual Directory** screen appears.
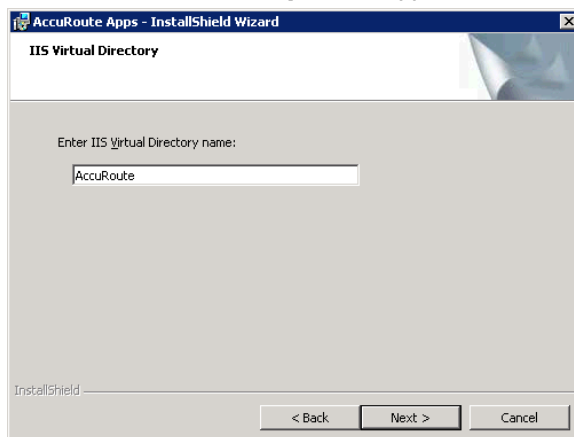
5   Name the Web Apps Client by entering the **IIS Virtual Directory name** here. The default is `AccuRoute`. You can change the virtual directory name if necessary. Then click **Next**.

> **Note**   The virtual directory name is used to create a virtual directory in IIS under Default Web Site.

The **Message Server** screen appears.
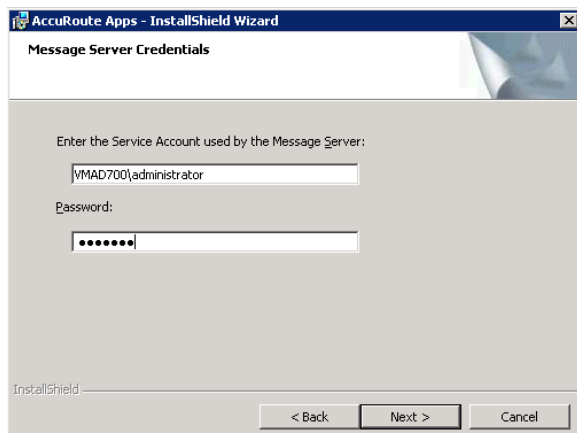
6   Enter the **Message Server name**. If the AccuRoute server is running in the system in which you are installing this client, the name is entered by default. Click **Next**.

The **Message Server Credentials** screen appears.

7   Enter the **Service Account** name and **Password** used by the AccuRoute Server, and click **Next**.

8   On the **Authentication Type** screen, select an **Authentication type** and enter the **Authentication server name**. Click **Next**.

9 The **Ready to Install the Program** screen appears. Click **Install**.
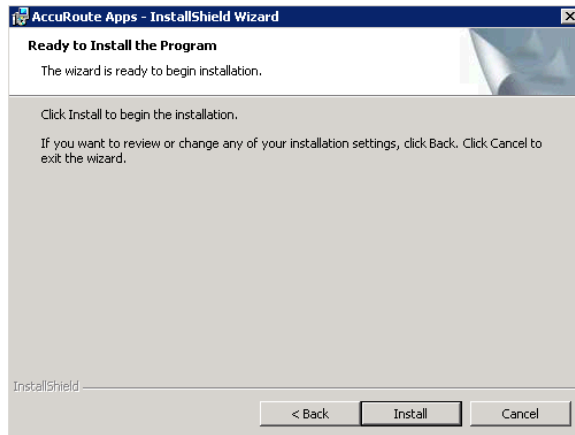
The InstallShield wizard installs the client and the **Completed** screen appears.
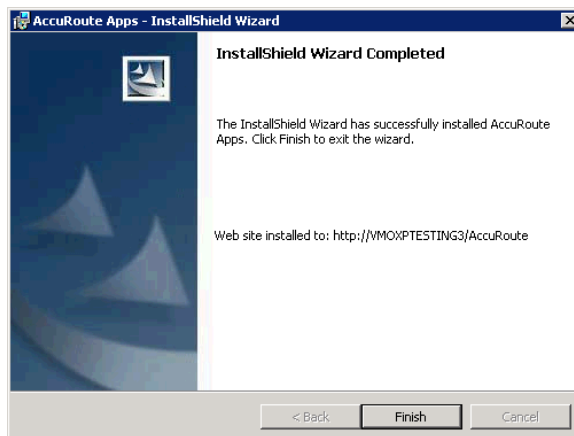
10 Click **Finish** to exit the wizard.

11 To launch the Web Apps Client, open a web browser with a URL of
https://*messageservername*/*virtualdirectoryname*.

Required DCOM permissions when installing on a remote system

When you install the AccuRoute Web Apps Client on a remote system, you must configure the DCOM permissions on the AccuRoute server. Without this configuration, the AccuRoute server cannot communicate with the remote clients. For DCOM configuration instructions, see Configuring required COM permissions for launching the remote Web Apps (6-11): .

Print to AccuRoute

This section describes how to install both of the client installation options included with the **Print to AccuRoute** software. You can select only one of these options to install. Each client option has both standard and silent mode installation processes.

This section includes:

Installing Print to AccuRoute for the Web

This section includes:

Standard Installation of Print to AccuRoute for Web

To install Print to AccuRoute for Web:

1 Log on to the system where the **Print to AccuRoute** client is being installed using an account that belongs to the local Administrators group.

2 Navigate to a network folder `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\PrintToAccuRoute` directory of the system running the AccuRoute server containing the **Print to AccuRoute** client setup files and run `Setup.Exe`. The setup opens the **InstallShield Wizard** and the **Welcome** message appears.

Note   If you are installing Print to AccuRoute on the same system, simply navigate to this folder to access the setup files. If you are installing Print to AccuRoute on a different system, ensure that proper access permissions have been set up for you to access the `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\Print to AccuRoute` directory. You can also copy the setup files to a shared network directory.

---

3 Click **Next** to begin the installation process.

4 The **Document Destination** page appears. Your selection here determines the course of the installation. Select **Upload to Web Client** and click **Next**..

5 The **Web Client URL** page appears. Enter the AccuRoute Web Client URL. This is usually:

`http://[ServerName]/webclient`
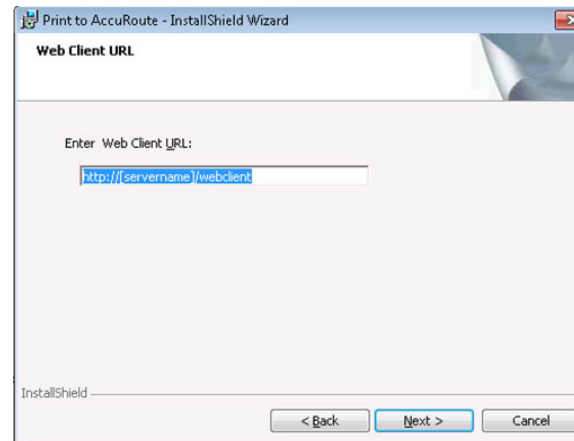
6 Click **Next.** The **Ready to Install the Program** page appears. Click **Install** to install the Print to AccuRoute Web Client.
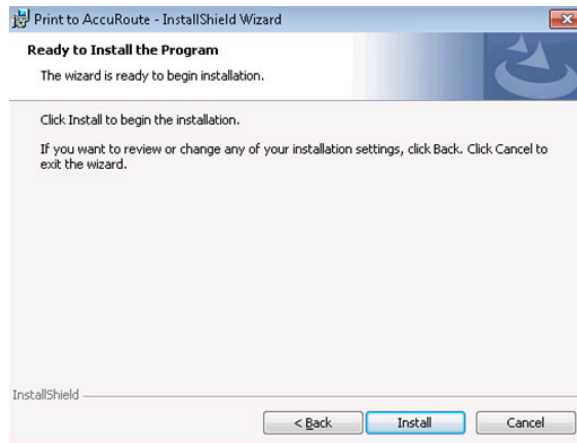
7 When installation is complete, the **InstallShield Wizard Completed** message appears. Click **Finish** to close the wizard.
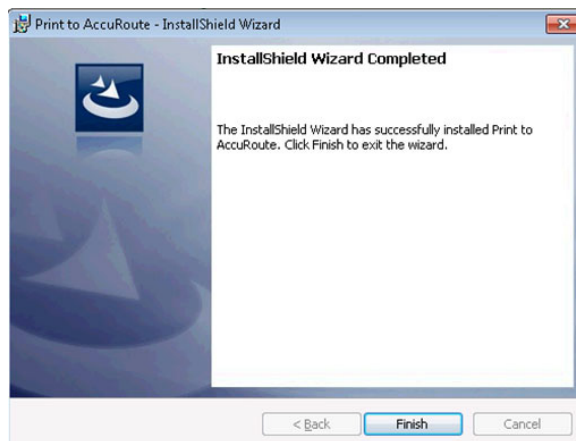
Silent Mode Installation of Print to AccuRoute for Web

To install Print to AccuRoute for Web in silent mode:

1 Log on to the client with an account that belongs to the local Administrators group using the AccuRoute Service Account credentials.

2 Copy the Print to AccuRoute setup directory to a local drive, or map a drive to the folder that contains the setup files.

3 Open a command prompt.

4 Set the current directory to the Print to AccuRoute setup directory.

5 Run: `setup.exe /s /V"/qn ADDLOCAL=WebUploader ACCUROUTE_SERVER=http://ARServer/WebClient"`

where the `ARServer` is the name of the AccuRoute server.

This installs Print to AccuRoute to the default location, `C:\Program Files\UplandAccuRoute\Print To AccuRoute.`

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: `setup.exe /s /V"/qn ADDLOCAL=WebUploader ACCUROUTE_SERVER=http://ARServer/WebClient INSTALLDIR=J:\PROGRA~1\UplandAccuRoute\ACCURO~1"`

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`.

To verify that Print to AccuRoute is installed on the client, go to **Device and Printers** and verify that the AccuRoutePDF printer is installed.

Installing Print to AccuRoute for AccuRoute Desktop

This section includes:

Standard Installation of Print to AccuRoute for AccuRoute Desktop

To install Print to AccuRoute for AccuRoute Desktop:

1   Log on to the system where the **Print to AccuRoute** client is being installed using an account that belongs to the local Administrators group.

2   Navigate to a network folder `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\PrintToAccuRoute` directory of the system running the AccuRoute server containing the **Print to AccuRoute** client setup files and run `Setup.Exe`. The setup opens the **InstallShield Wizard** and the **Welcome** message appears.

Note   If you are installing Print to AccuRoute on the same system, simply navigate to this folder to access the setup files. If you are installing Print to AccuRoute on a different system, ensure that proper access permissions have been set up for you to access the `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\Print to AccuRoute` directory. You can also copy the setup files to a shared network directory.

---

3 Click **Next** to begin the installation process.

4 The **Document Destination** page appears. Your selection here determines the course of the installation. Select **Launch AccuRoute Desktop** and click **Next**.

5 The **Ready to Install the Program** page appears. Click **Install** to install Print to AccuRoute for the AccuRoute Desktop.
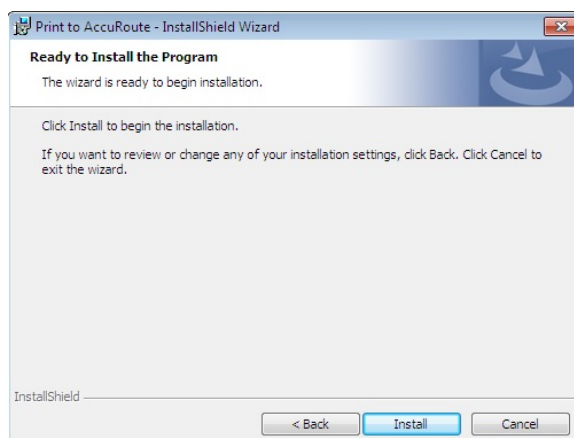
6   When installation is complete, the **InstallShield Wizard Completed** message appears.
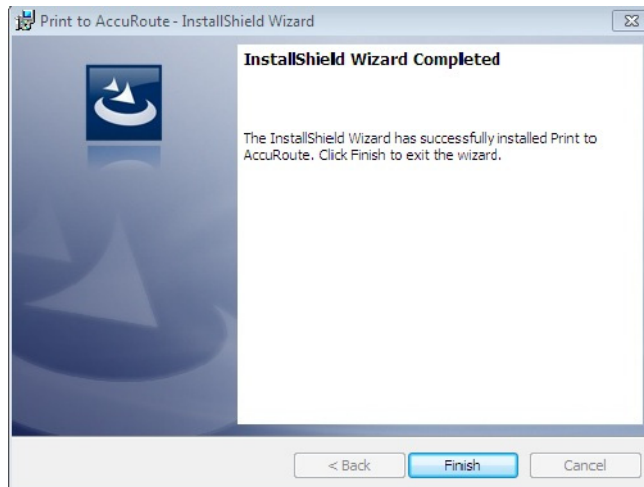
7   Click **Finish** to close the wizard.

Silent Mode Installation of Print to AccuRoute for AccuRoute Desktop

> **Note**   The AccuRoute Desktop Client must be installed prior to installing Print to AccuRoute.

To install Print to AccuRoute for AccuRoute Desktop in silent mode:

1   Log on to the client with an account that belongs to the local Administrators group using the AccuRoute Service Account credentials.

2   Copy the Print to AccuRoute setup directory to a local drive, or map a drive to the folder that contains the setup files.

3   Open a command prompt.

4   Set the current directory to the Print to AccuRoute setup directory.

5   Run: `setup.exe /s /V"/qn ADDLOCAL=ARDLauncher"`

This installs Print to AccuRoute to the default location, `C:\Program Files\UplandAccuRoute\Print To AccuRoute`.

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

```
setup.exe /s /V"/qn ADDLOCAL=ARDLauncher
INSTALLDIR=J:\PROGRA~1\UPLANDACCUROUTE\ACCURO~1"
```

> *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`.

To verify that Print to AccuRoute is installed on the client, go to **Device and Printers** and verify that the AccuRoutePDF printer is installed.

AccuRoute Queue

This section includes:

Installing AccuRoute Queue

To install AccuRoute Queue:

1 Log on to the system where the **AccuRoute Queue** client is being installed using an account that belongs to the local Administrators group.

2 Navigate to a network folder `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteQueue` directory of the system running the AccuRoute server containing the **AccuRoute Queue** client setup files and run `Setup.Exe`. The setup opens the **InstallShield Wizard** and the **Welcome** message appears.

> **Note**   If you are installing AccuRoute Queue on the same system, simply navigate to this folder to access the setup files. If you are installing AccuRoute Queue on a different system, ensure that proper access permissions have been set up for you to access the `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteQueue` directory. You can also copy the setup files to a shared network directory.

3 Click **Next** to begin the installation process.
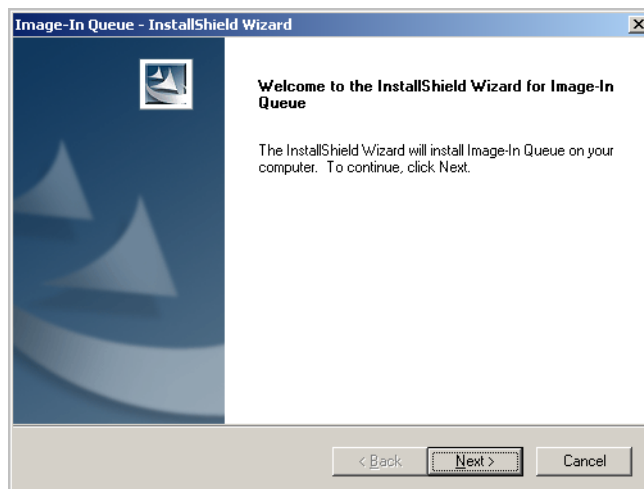
4   The **License Agreement** screen appears.
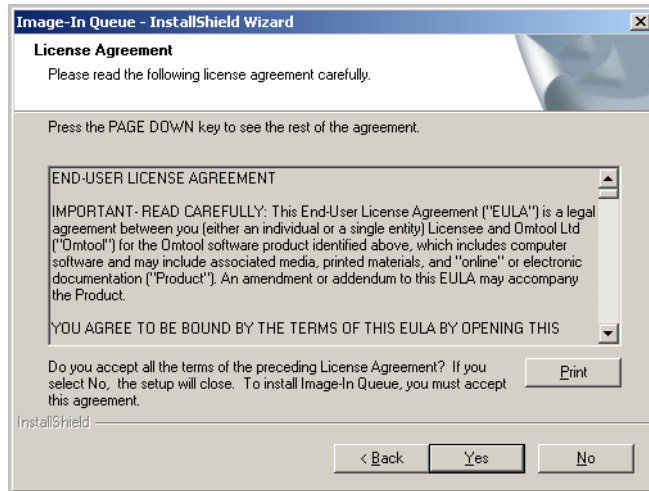
Read the agreement carefully and if you agree to the terms, click **Yes**.

5   The **Destination Folder** screen opens. The default destination is `C:\Program Files\UplandAccuRoute\AccuRouteQueue`.
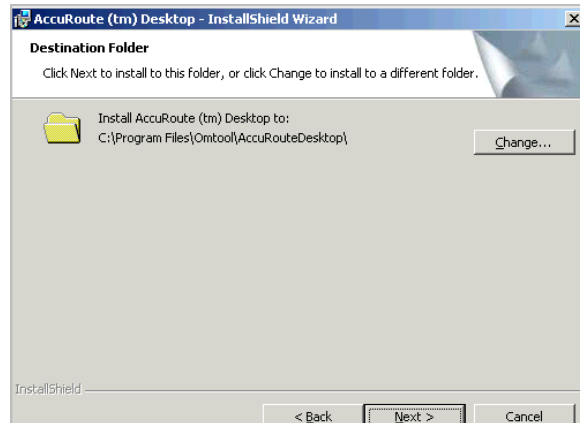
Note   On 64 bit systems, the default destination folder is `C:\Program Files(x86)\UplandAccuRoute\AccuRouteQueue`.

6   Click **Next** to accept the default destination. The **Start Copying Files** page appears listing
installation details you have supplied. If you want to install in a non-default location, click **Browse**,
select the required location, and then click **Next**.
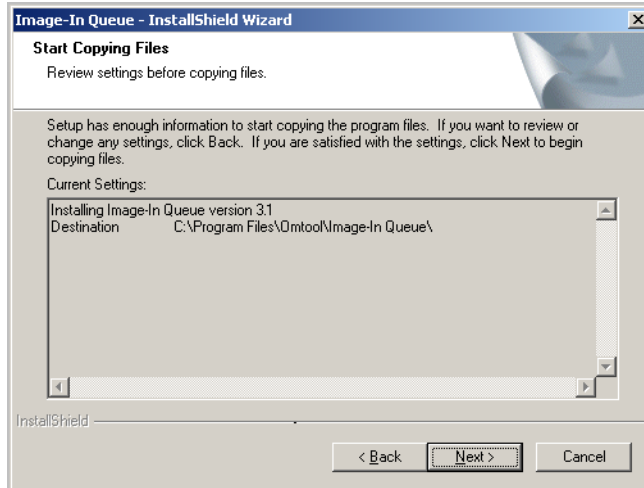
7   The installation begins.
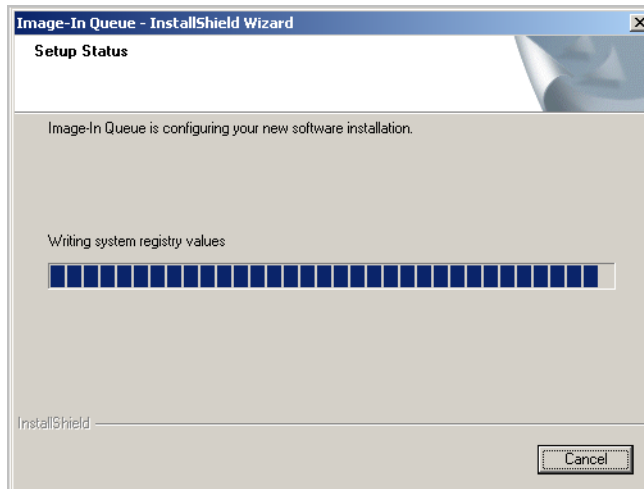
8 The **InstallShield Wizard Complete** screen appears when installation is complete.
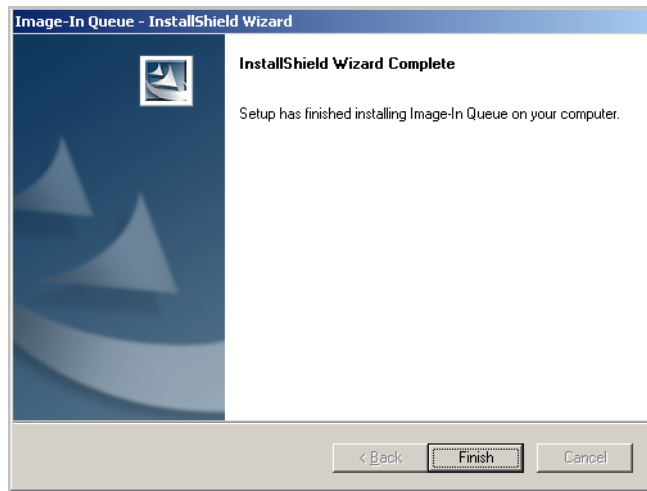
9 Click **Finish** to close the wizard.

Running AccuRoute Queue setup in silent mode

To run AccuRoute Queue setup in silent mode:

1 Log on to the client with an account that belongs to the local Administrators group using the AccuRoute 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\UplandAccuRoute\AccuRoute\Clients\AccuRouteQueue`.

Note On 64 bit systems, the setup files are located in the `C:\Program Files (x86)\UplandAccuRoute\AccuRoute\Clients\AccuRouteQueue` directory.

---

4 To install AccuRoute 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)\UplandAccuRoute\AccuRoute\Clients\AccuRouteQueue`.

Note For 64 bit systems, the path is `C:\Program Files\UplandAccuRoute\AccuRoute \Clients\AccuRouteQueue\setup.exe`

---

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

This installs AccuRoute Queue to the default location:
`C:\Program Files\UplandAccuRoute\AccuRouteQueue`.

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\AccuRoute\AccuRouteQueue`, then the short path is
`C:\Progra~1(x86)\AccuRoute\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 AccuRoute Queue is installed on the client by navigating to `...\AccuRoute\AccuRoute`
`Queue` on the client and verifying that the AccuRoute Queue program files are installed.

AccuRoute Acquisition

This section includes:

Installing AccuRoute Acquisition
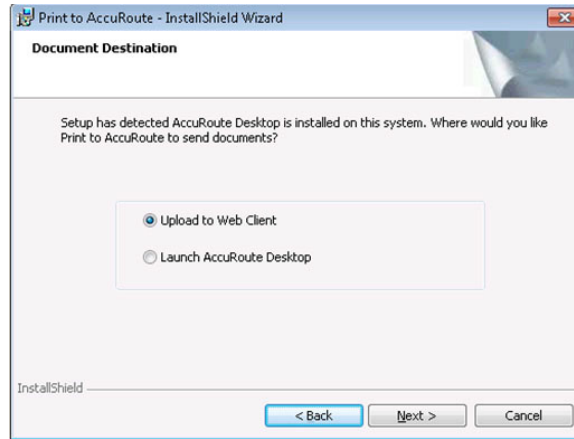
To install AccuRoute Queue:

1   Log on to the system where the **AccuRoute Acquisition** client is being installed using an account
that belongs to the local Administrators group.

2   Navigate to a network folder `C:\Program`
`Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteAcquisition` directory of
the system running the AccuRoute server containing the **AccuRoute Acquisition** client setup files
and run `Setup.Exe`. The setup opens the **InstallShield Wizard** and the **Welcome** message
appears.

Note   If you are installing AccuRoute Acquisition on the same system, simply navigate to this folder to access the
setup files. If you are installing AccuRoute Acquisition on a different system, ensure that proper access
permissions have been set up for you to access the `C:\Program`
`Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteAcquisition`
directory. You can also copy the setup files to a shared network directory.

**3**   Click **Next** to begin the installation process.
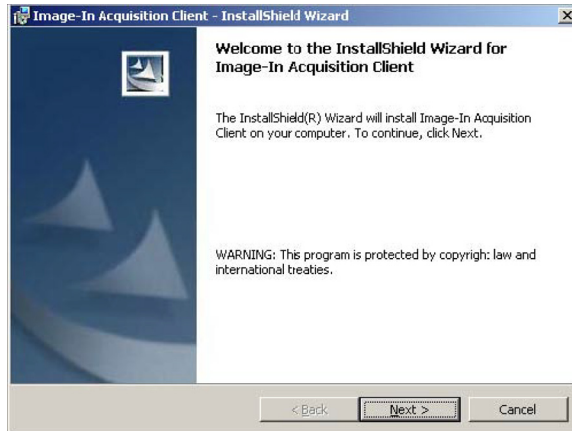
4   The **License Agreement** screen appears.

Read the agreement carefully and if you agree to the terms, click **Yes**.
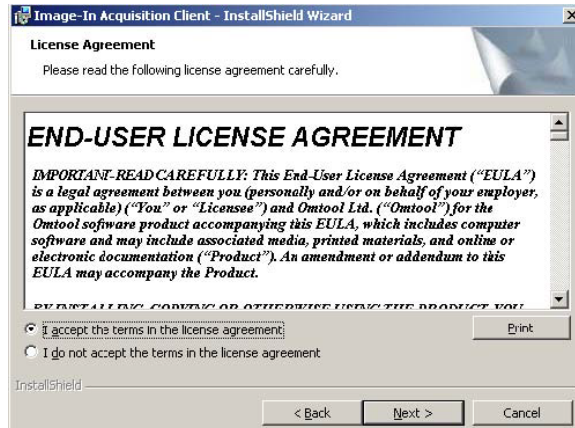
5   Click **Next**.

The **Destination Folder** screen opens. The default destination is `C:\Program Files\AccuRoute\AccuRouteAcquisition`.
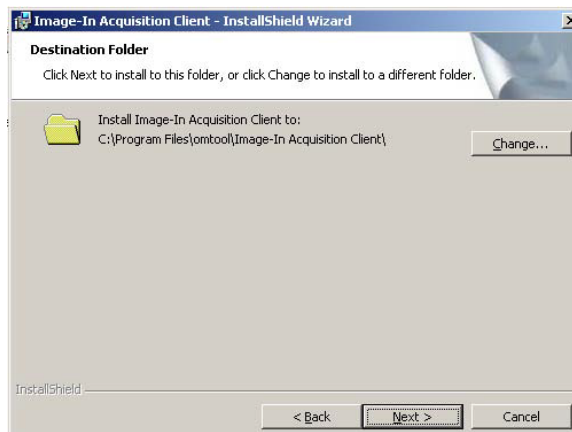
6   Click **Next** to accept the default destination.

The **Ready to Install the Program** page opens. If you want to install in a non-default location, click **Browse**, select the required location, and then click **Next**.
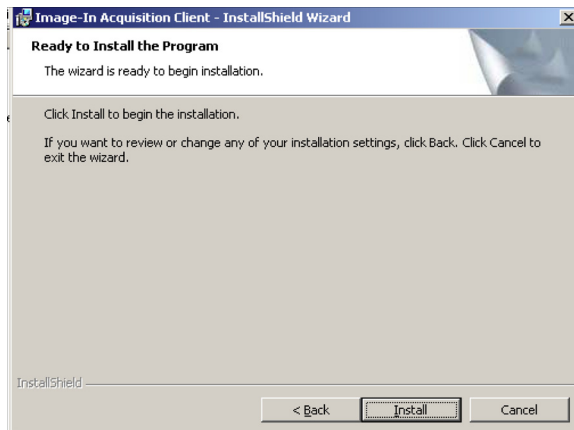
7   Click **Install** to begin the installation. When installation is complete, the InstallShield Wizard **Complete** message appears.
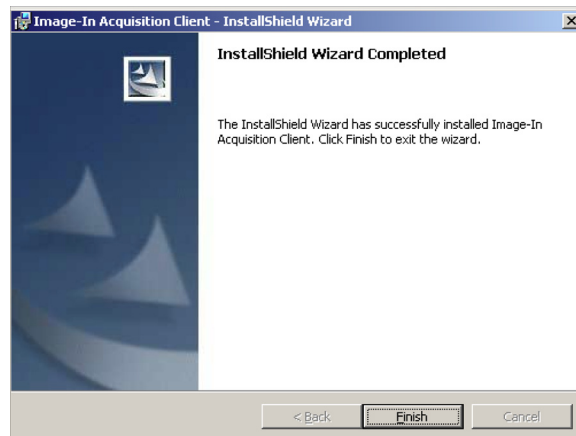
8   Click **Finish** to close the wizard.

Running the AccuRoute Acquisition setup in silent mode

To run the AccuRoute Acquisition setup in silent mode:

1   Log in to the client with an account that belongs to the local Administrators group using the AccuRoute 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\UplandAccuRoute\AccuRoute\Clients\AccuRouteAcquisition`.

Note   On 64 bit systems, the setup files are located in the `C:\Program Files (x86)\UplandAccuRoute\AccuRoute\Clients\AccuRouteAquisition` **directory**.

4   To install AccuRoute Aquisition 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)\UplandAccuRoute\AccuRoute\Clients\AccuRouteAcquisition`.

Note   For 64 bit systems, the path is `C:\Program Files\UplandAccuRoute\AccuRoute \Clients\AccuRouteAquisition\setup.exe`

---

6   To install AccuRoute Acquisition in another system, run: `setup.exe /s /v"/qn"`

This installs AccuRoute Aquisition to the default location: `C:\Program Files(x86)\UplandAccuRoute\AccuRouteAquisition`.

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.

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`.

---

8   Verify that AccuRoute Acquisition is installed on the client by

a   Navigating to `...\AccuRoute\\AccuRouteAcquisition` directory on the client system.

b   Verifying that the AccuRoute Acquisition program files are installed.

AccuRoute Connect

This section includes:

Installing AccuRoute Connect

To install AccuRoute Connect:

1   Log on to the system where the **AccuRoute Connect** client is being installed using an account that belongs to the local Administrators group.

2   Navigate to a network folder `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteConnect` directory of the system running the AccuRoute server containing the **AccuRoute Connect** client setup files and run `Setup.Exe`.

3   The setup opens the **InstallShield Wizard** and the **Welcome** message appears.
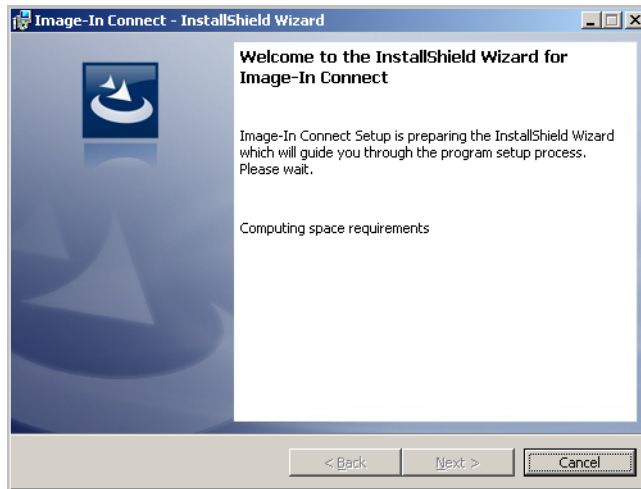
Note   If you are installing AccuRoute Connect on the same system, simply navigate to this folder to access the setup files. If you are installing AccuRoute Connect on a different system, ensure that proper access permissions have been set up for you to access the `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteConnect` directory. You can also copy the setup files to a shared network directory.

4   Click **Next**. The **License Agreement** screen appears.
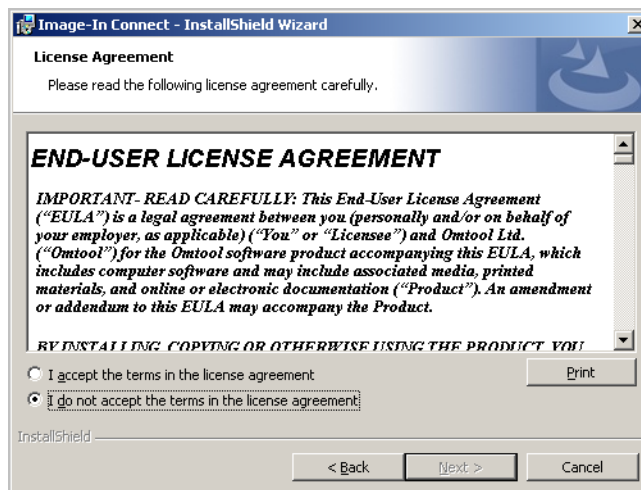
5   Read the license agreement and if you agree, select the **I accept the terms in the license agreement** option.

6   Click **Next**. The setup shows the **Ready to Install the Program** screen.
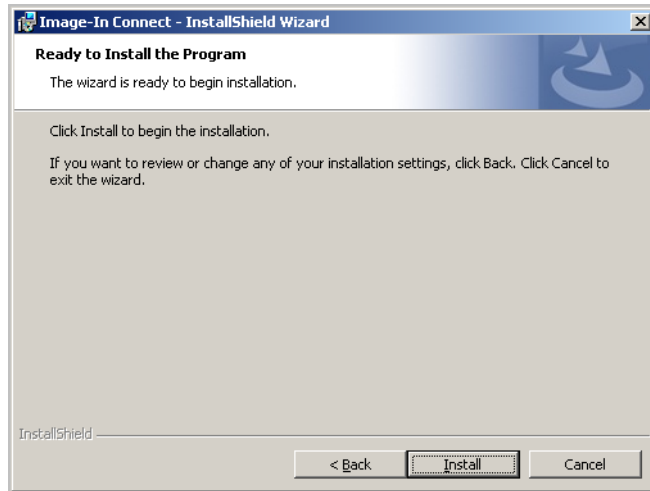
7   Click **Next** to begin the installation. When installation is complete, the **Installation Complete** screen appears.
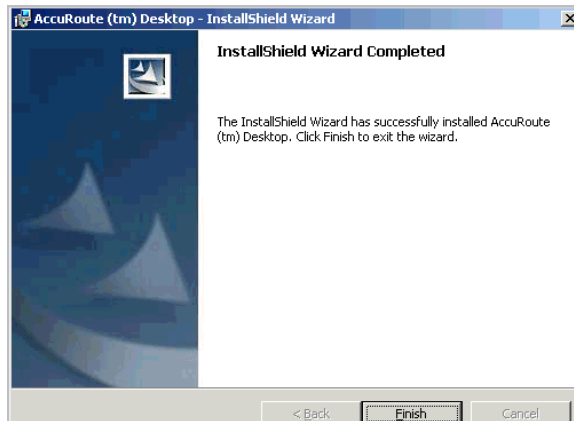
8   Clear the **Launch AccuRoute Connect** option if you do not want to open the application.

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

Running the AccuRoute Connect setup in silent mode

To run the AccuRoute Connect setup in silent mode:

1   Log in to the client with an account that belongs to the local Administrators group using the AccuRoute 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\UplandAccuRoute\AccuRoute\Clients\AccuRouteConnect`.

> **Note** On 64 bit systems, the setup files are located in the `C:\Program Files (x86)\UplandAccuRoute\AccuRoute\Clients\AccuRouteConnect` **directory**.

4 To install AccuRoute Connect 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)\UplandAccuRoute\AccuRoute\Clients\AccuRouteAcquisition`.

> **Note** For 64 bit systems, the path is `C:\Program Files\UplandAccuRoute\AccuRoute \Clients\AccuRouteAquisition\setup.exe`

6 To install AccuRoute Acquisition in another system, change the current directory to the one containing the setup files. The default location is `C:\Program Files(x86)\UplandAccuRoute\AccuRoute\Clients\AccuRouteQueue`.

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

This installs AccuRoute Connect to the default location:
`C:\Program Files(x86)\UplandAccuRoute\AccuRouteConnect`.

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

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

9 Verify that AccuRoute Connect is installed on the client by

a Navigating to `...\AccuRoute\\AccuRouteConnect` directory on the client system.

b Verifying that the AccuRoute Connect program files are installed.

AccuRoute COM API

This section includes:

About the Embedded AccuRoute for Intelligent Devices components

The **Embedded AccuRoute for Intelligent Devices** setup program installs the required DLL files and the Sample project for Visual Basic.

The required DLL files are:

- …\Program Files\Common Files\Upland AccuRoute\omfGFScriptingU.DLL (registered)

- …\Program Files\Common Files\Upland AccuRoute\omfGFInterfacesps.DLL (registered)

- …\Program Files\Common Files\Upland AccuRoute\omimg.DLL

The Sample project for Visual Basic is installed to …\Upland AccuRoute\ComAPI\Sample with several modules:

- EDProcessSample.BAS

- EDSample.BAS

- EDScanSample.BAS

- FAXSample.BAS

Embedded AccuRoute for Intelligent Devices for COM API installation

Download the **Embedded AccuRoute for Intelligent Devices** from the Upland AccuRoute web site. Then install it on the system where you intend to run the applications.

To install the Embedded AccuRoute for Intelligent Devices:

1 Run the Embedded AccuRoute for Intelligent Devices update utility on the AccuRoute server. This installs the Embedded AccuRoute for Intelligent Devices setup to …\Upland AccuRoute\AccuRoute\Clients\ComAPI.

2 Navigate to ...\Upland AccuRoute\AccuRoute\Clients\ComAPI and run setup.exe. The InstallShield wizard displays the **Welcome** screen.

3 Click **Next**. The **License Agreement** screen appears.

4 Read the license agreement and click **Yes** if you agree to the terms. The **Choose Destination Location** screen appears.

5 Accept the default location, or choose a new location if necessary, and click **Next**. The **Start Copying Files** screen appears.

6 Review the installation settings and click **Next**. The setup program installs the Embedded AccuRoute for Intelligent Devices and displays the InstallShield Wizard **Complete** screen.

7 Click **Finish**.

AccuRoute Cost Recovery

This section includes:

Backing up existing AccuRoute Cost Recovery configuration files

When upgrading CostRecovery from a previous version, make a backup copy of the following **Cost Recovery** configuration files:

- `\Upland AccuRoute\AccuRoute\CostRecovery\LFCostRecoveryU.ini`

- `\Upland AccuRoute\AccuRoute\CostRecovery\lfaccounting.ini`

- `\Upland AccuRoute\AccuRoute\CostRecovery\CostRecovery.txt`

After these files have been backed up, remove Cost Recovery. (Go to Removing CostRecovery on 2-4.) Then continue to Running the setup.

Running the AccuRoute Cost Recovery setup

To run the AccuRoute Cost Recovery setup:

1 Log on to the system where the **AccuRoute Cost Recovery** client is being installed using an account that belongs to the local Administrators group.

2 Navigate to a network folder `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteCostRecovery` directory of the system running the AccuRoute server containing the **AccuRoute Cost Recovery** client setup files and run `Setup.Exe`. The setup opens the **InstallShield Wizard** and the **Welcome** message appears.

Note If you are installing Cost Recovery on the same system, simply navigate to this folder to access the setup files. If you are installing Cost Recovery on a different system, ensure that proper access permissions have been set up for you to access the `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteCostRecovery` directory. You can also copy the setup files to a shared network directory.

---

3 Click **Next** to begin the installation process.
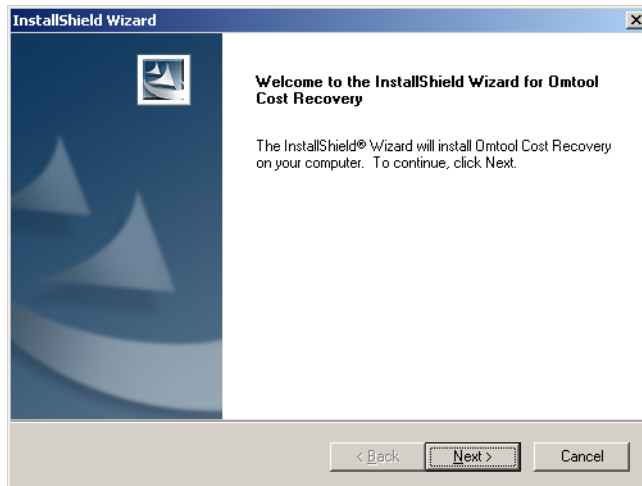
4   Click **Next**. The **License Agreement** screen appears.
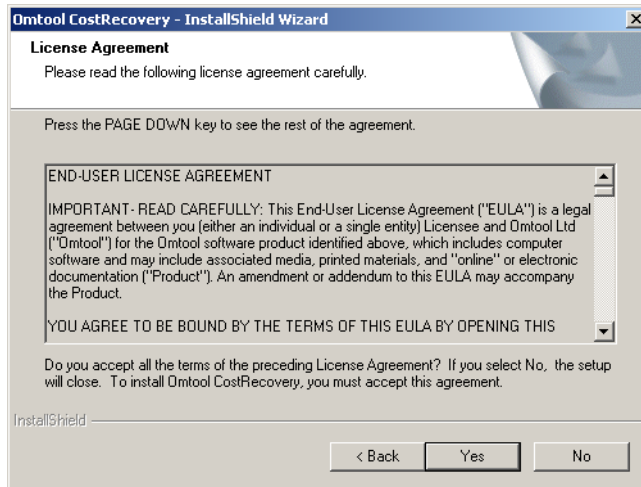
5   Read the license agreement and click **Yes** if you agree to its terms. The installation **Choose Destination Location** screen appears.
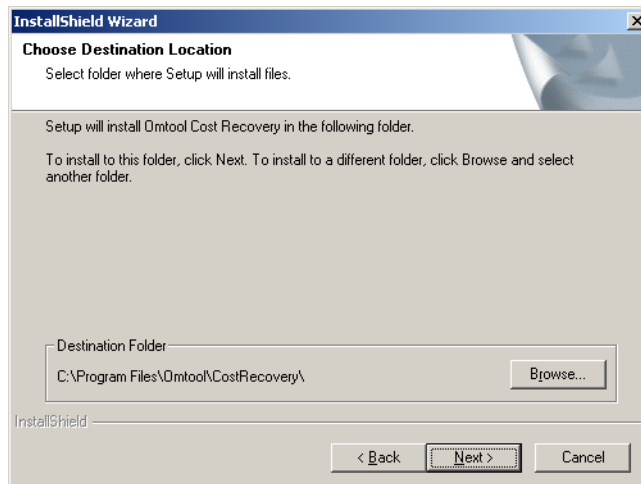
6   Click **Next** to accept the default installation location or click **Browse** to select a custom installation location. Then the Cost Recovery setup prompts you to enter the name of the AccuRoute **Server**.

7 Click **Next**. The **Current Settings** screen appears for your review.
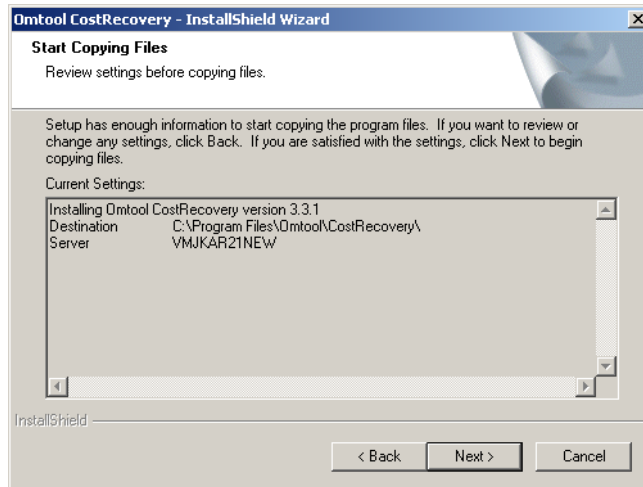
8 Click **Next** to start the installation. The **InstallShield Wizard Complete** screen appears when the installation is complete.
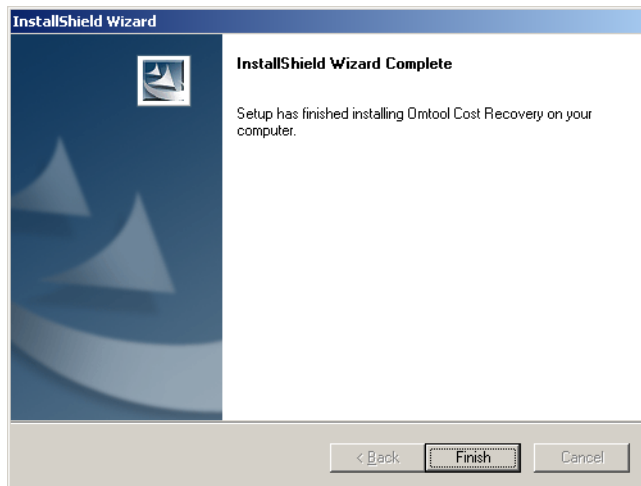
9 Click **Finish**.

When upgrading from a previous version, use the configuration files to reconfigure CostRecovery.

Important	If CostRecovery is being upgraded from a previous version, the application configuration files were backed up before the latest version of CostRecovery was installed. Do not overwrite the new configuration files using the backup copies from an older version. The latest configuration files that are installed with the application can contain configurations that pertain to new features. Carefully compare the data in the two sets of configuration files, and then copy data into the new files where it is appropriate.

AccuRoute Server Monitor

This section includes:

About the AccuRoute Server Monitor client components

AccuRoute Server Monitor is installed with two components: **AccuRoute Server Monitor Administrator** and **AccuRoute Server Monitor service**. The Server Monitor service is a Windows service that monitors the AccuRoute Server environment and is installed only on one system. The Server Monitor Administrator can be installed on multiple systems so that one or more administrators can conveniently manage the AccuRoute Server Monitor.

> *Tip*   AccuRoute Server Monitor Administrator and AccuRoute Server Administrator are snap-ins to the Microsoft Management Console. Both snap-ins are supported on the same system so that administrators can manage the AccuRoute Server and the application that monitors it from the same location.

Installing AccuRoute Server Monitor

The AccuRoute Server Monitor setup files are installed on the AccuRoute Server in a folder that is not shared by default. Before installing Server Monitor, log on to the AccuRoute Server using an account that belongs to the local Administrators group, share `C:\Program Files\Upland AccuRoute\AccuRoute\Clients\AccuRouteServerMonitor,` and give the Server Monitor installation user read access to the share the path.

To install AccuRoute Server Monitor:

1   Log on to the system where the **AccuRoute Server Monitor** client is being installed using an account that belongs to the local Administrators group.

2   Navigate to a network folder `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteServerMonitor` directory of the system running the AccuRoute server containing the **AccuRoute Server Monitor** client setup files and run `Setup.Exe`. The setup opens the **InstallShield Wizard** and the **Welcome** message appears.

> **Note**   If you are installing AccuRoute Server Monitor on the same system, simply navigate to this folder to access the setup files. If you are installing AccuRoute Server Monitor on a different system, ensure that proper access permissions have been set up for you to access the `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteServerMonitor` directory. You can also copy the setup files to a shared network directory.

3   Click **Next** to begin the installation process.
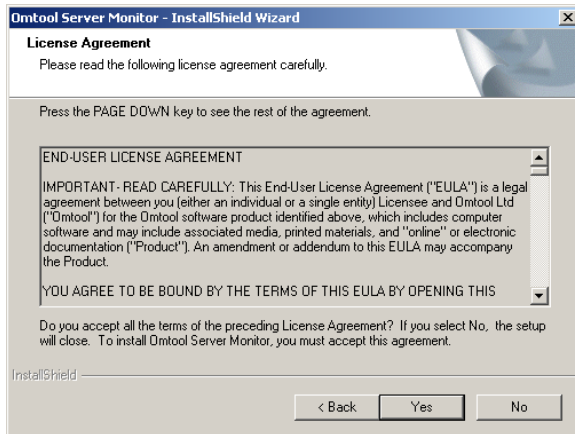
4   Click **Next**. The setup shows the license agreement.

5   Read the license agreement and click **Yes** if you agree to the terms. The setup shows setup options.
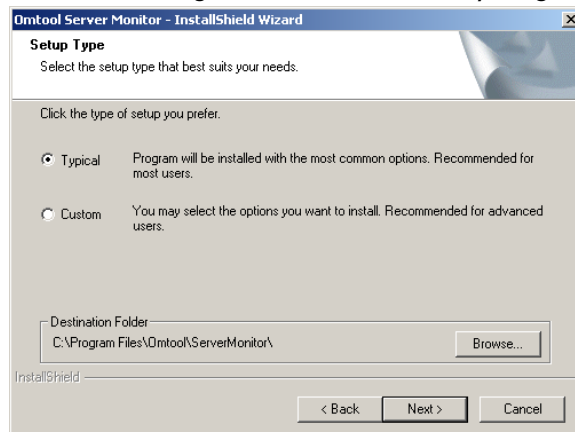
6   Click **Next**. The setup requests logon credentials for the AccuRoute Server Monitor Service.

> **Note**   To install only the AccuRoute Server Monitor Administrator, select **Custom**. Clear **Server Monitor Service** and click **Next**. Go to step 8.
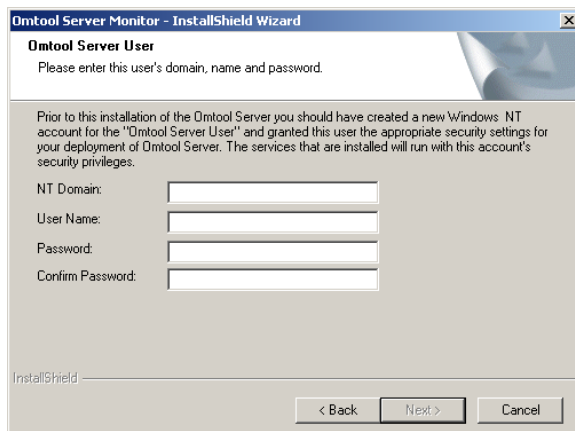
7 Enter the logon credentials of the AccuRoute service account or another account that belongs to the AccuRoute Admins group on the AccuRoute Server, and click **Next**. The setup shows installation settings.
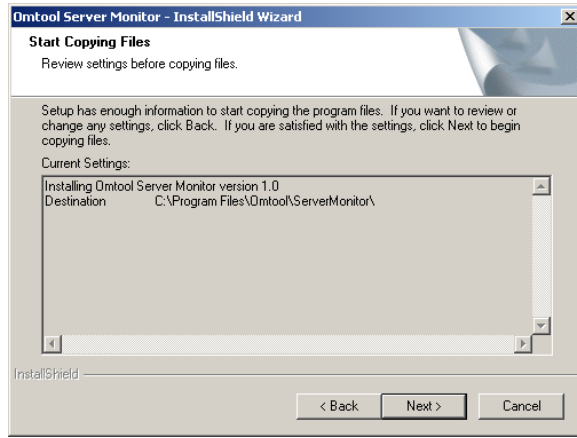
8 Review the installation settings and click **Next** to begin the installation. The setup shows a message indicating that the installation is complete.

9 Click **Finish**.

AccuRoute FaxCenter

This section includes:

Installing AccuRoute FaxCenter

To install AccuRoute FaxCenter:

1 Log on to the system where the **AccuRoute FaxCenter** client is being installed using an account that belongs to the local Administrators group.

2 Navigate to a network folder `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRouteFaxCenter` directory of the system running the AccuRoute server containing the **AccuRoute FaxCenter** client setup files and run `Setup.Exe`. The setup opens the **InstallShield Wizard** and the **Welcome** message appears.

> **Note** If you are installing FaxCenter on the same system, simply navigate to this folder to access the setup files. If you are installing FaxCenter on a different system, ensure that proper access permissions have been set up for you to access the `C:\Program Files\UplandAccuRoute\AccuRoute\Clients\AccuRoute FaxCenter` directory. You can also copy the setup files to a shared network directory.

3   Click **Next** to begin the installation process.
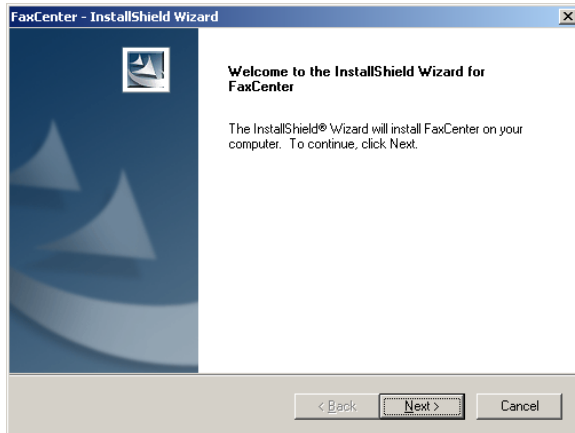
4   Click **Next**. The **License Agreement** screen appears.
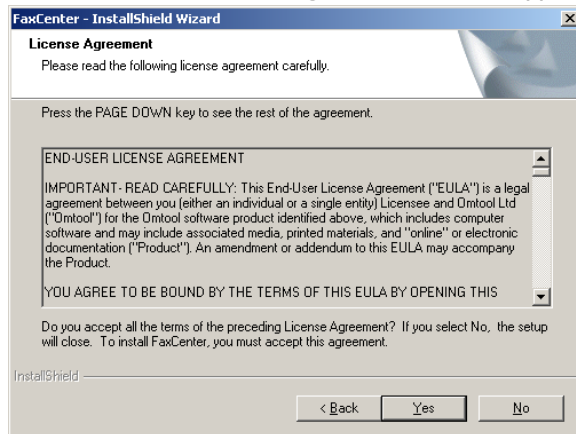
5   Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The **Choose Destination Location** screen appears.
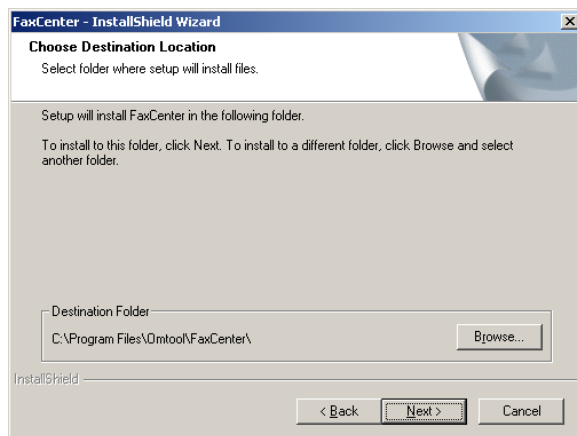
6 Click **Browse**, navigate to the location where you want to install FaxCenter, select the installation directory, click **OK**, and click **Next**. The **Start Copying Files** screen appears.
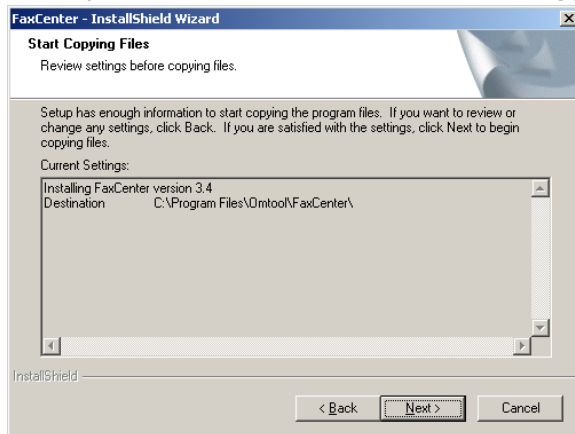
7 Review the installation settings and click **Next** to begin installing FaxCenter. The **InstallShield Wizard Complete** screen appears.
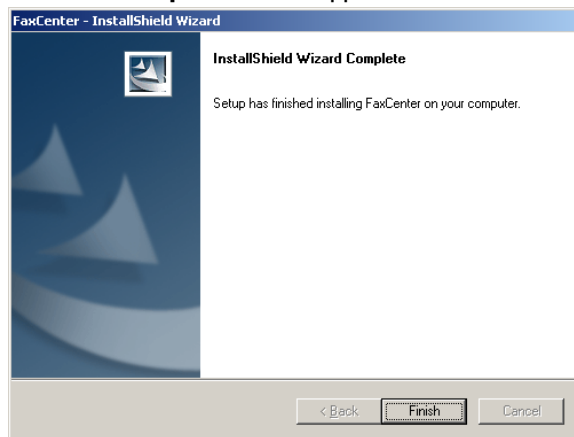
8 Click **Finish**. The installation is complete.

Section 5: Required Server Configuration

This section contains a brief description of the required server configurations for the AccuRoute clients.

This section includes:

> [AccuRoute Desktop](5-2) (5-2)
>
> [AccuRoute Web Apps](5-8) (5-8)
>
> [AccuRoute Queue](5-11) (5-11)
>
> [AccuRoute Connect](5-12) (5-12)
>
> [AccuRoute Server Monitor](5-17) (5-17)
>
> [AccuRoute FaxCenter](5-20) (5-20)

Note: The following clients have no required server configurations.

- Print to AccuRoute
- AccuRoute Acquisition
- AccuRoute COM API
- AccuRoute Cost Recovery

AccuRoute Desktop

This section includes:

Configuring server-client connectivity for AccuRoute Desktop

AccuRoute Desktop supports multiple server-client connectivity methods. Choose an appropriate method for the target environment and then complete the required configuration.

This section includes:

About connecting with the AccuRoute Server

AccuRoute Desktop supports the following methods of server-client connectivity:

- DCOM
- HTTP
- Secure HTTP

At the beginning of a session, AccuRoute Desktop establishes a connection to the AccuRoute Server—either by connecting directly using DCOM or submitting the request to AccuRoute Intelligent Device Client. The initial connection validates the user's permissions to run AccuRoute Desktop and solicits a response from the AccuRoute Server.

> **Note**   AccuRoute Desktop does not maintain a constant connection to the AccuRoute Server during a session. Instead, AccuRoute Desktop requests and submits data to the AccuRoute Server on demand.

For example, when the user tries to open an Embedded Directive, AccuRoute Desktop requests a list of the user's Embedded Directives from the AccuRoute Server.

This connectivity behavior brings an added benefit to environments with an AccuRoute Server cluster. AccuRoute Desktop can continue a session even when the AccuRoute Server cluster enters a failover state and the alternative AccuRoute Server becomes active. Although a momentary delay can occur during the failover transition, AccuRoute Desktop establishes a connection to whichever AccuRoute Server is active.

On startup, AccuRoute Desktop reads the connection string and analyzes the first 5 characters. (The connection string is either preconfigured in `AccuRouteClient.XML` or entered in the Connect To Server dialog box.)

- If the first 5 characters of the connection string are http:, AccuRoute Desktop uses `HTTP` connectivity.
- If the first 5 characters of the connection string are https, AccuRoute Desktop uses Secure `HTTP` connectivity.
- For all other values, AccuRoute Desktop uses DCOM connectivity.

> **Note**   For HTTP or secure HTTP connectivity, AccuRoute Intelligent Device Client is required. Additionally, if the environment has an AccuRoute Server cluster, then AccuRoute Intelligent Device Client must be configured to support an AccuRoute Server cluster. For more information, consult the AccuRoute Intelligent Device Client chapter of the *AccuRoute Server Installation and Configuration Guide.*

Configuring server-client connectivity methods

To configure server-client connectivity, follow the instructions for the appropriate connectivity method:

- [DCOM](#) - The DCOM connectivity method facilitates a direct connection between AccuRoute Desktop and the AccuRoute Server.

- [HTTP](#) - The HTTP connectivity method facilitates a connection between AccuRoute Desktop and AccuRoute Intelligent Device Client on the web server. (AccuRoute Intelligent Device Client is a web service extension that handles requests for AccuRoute Desktop and the AccuRoute Server).

- [Secure HTTP](#) -The secure HTTP connectivity method facilitates a secure connection between AccuRoute Desktop and AccuRoute Intelligent Device Client on the web server. (AccuRoute Intelligent Device Client is a web service extension that handles requests for AccuRoute Desktop and the AccuRoute Server.)

DCOM

The DCOM configuration on the client running AccuRoute Desktop must give access permissions to the AccuRoute Server account.

To configure DCOM permissions on Windows 2016 and on Windows 2012:

1   Log in to the system where you will install AccuRoute Server using the login credentials of the local Administrators group.

2   Click **Start** and select **Run**. Enter `dcomcnfg` and click **OK**. The **Component Services** snap-in opens.

3   Expand **Component Services > Computers**. Right-click **My Computer** and select **Properties** from the menu options.

4   Click the **COM Security** tab.

5   Under **Launch and Activation Permissions**, click the **Edit Limits** button, and then click the **Add** button.

6   Add **Anonymous Logon** in the **Permissions** list, select the **Allow check box to allow the Local Launch** permission, **Local Activation** permission, **Remote Launc**h permission, and **Remote Activation** permission for the selected group.

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

8   Restart the system for these configuration changes to take effect.

HTTP

HTTP connectivity requires AccuRoute Intelligent Device Client. For more information, consult the AccuRoute Intelligent Device Client section in the AccuRoute Server Installation Guide. No additional client configuration is required.

Secure HTTP

Secure HTTP connectivity requires AccuRoute Intelligent Device Client, and it must be configured to accept secure HTTP requests. For more information, consult the AccuRoute Intelligent Device Client section in the AccuRoute Server Installation Guide. No additional client configuration is required.

Implementing connectivity methods

On startup, AccuRoute Desktop must be able to establish a connection to the AccuRoute Server. This requires a connection string which represents either the location of the AccuRoute Server (DCOM connectivity) or the web address of the virtual directory where AccuRoute Intelligent Device Client is installed (HTTP and secure HTTP connectivity).

To establish a connection to the AccuRoute Server, AccuRoute Desktop does one of the following:

- Reads the connection string in `AccuRouteClient.XML` and connects to the AccuRoute Server automatically.

- Reads all connection strings in `AccuRouteClient.XML` and prompts the user select a connection string. By default, the user can also enter a connection string manually.

Because AccuRoute Desktop can be customized for users and groups, both scenarios can occur in the same environment. Both methods require implementation. For more information, see

- [Entering the connection string manually during login](#) (5-5)

- [Preconfiguring AccuRoute Desktop with the connection string](#) (5-5)

Entering the connection string manually during login

When logging in to AccuRoute Desktop, the user can enter the connection string manually. It must be formatted appropriately for the connectivity method being used.

Table 5-1: **Connection string formats for DCOM, HTTP, and secure HTTP connectivity**

Connectivity method	Connection string format
DCOM	**AccuRoute Server computer name or IP address** Examples: • 172.16.10.47 • LANGSTON
HTTP	**http://<web server computer name or IP address>/DESKTOPWebAPI/** The web server is the system running AccuRoute Intelligent Device Client. Examples: • http://172.16.10.43/DESKTOPWebAPI • http://SAPPHIRE/DESKTOPWebAPI AccuRoute recommends using the IP address because this can reduce or eliminate connection failures related to DNS issues. The connection string must start with "http:". If it starts with any other value, AccuRoute Desktop attempts to connect to the AccuRoute Server using DCOM connectivity. Secure HTTP is not supported when AccuRoute Intelligent Device Client is configured to accept HTTP requests. If the address includes "https" at the beginning, AccuRoute Desktop returns an error and no server connection is established.
secure HTTP	**https://<web server computer name or IP address>/DESKTOPWebAPI/** The web server is the system running AccuRoute Intelligent Device Client. Examples: • https://172.16.10.43/DESKTOPWebAPI • https://SAPPHIRE/DESKTOPWebAPI AccuRoute recommends using the IP address because this can reduce or eliminate connection failures related to DNS issues. When secure HTTP connectivity is configured, only secure HTTP requests are accepted. The connection string must start with "https", for example, https://langston/desktopwebapi/. If it starts with any other value, AccuRoute Desktop returns an error and no server connection is established.

Preconfiguring AccuRoute Desktop with the connection string

The AccuRoute Desktop configuration file, `AccuRouteClient.XML`, can be configured with the connection string so that AccuRoute Desktop automatically displays the connection string in the server menu or connects to the AccuRoute Server immediately.

Upland AccuRoute strongly recommends this configuration. It can eliminate or reduce issues that can occur when users do not format the connection string correctly.

To configure AccuRoute Desktop to connect to the AccuRoute Server automatically:

Go to Section 9: Frequently Asked Questions and see Can the client connect automatically without prompting the user on startup? (9-4).

To configure AccuRoute Desktop to display the connection string in the server menu:

1 Locate `AccuRouteClient.XML` on the client on the AccuRoute Server located in `…\Upland AccuRoute\AccuRoute\Clients\AccuRoute Desktop`.

If any modifications are made to the AccuRoute Desktop setup on the AccuRoute Server and the environment has Server cluster, AccuRoute strongly recommends repeating this procedure on the alternative AccuRoute Server.

2   Open the file in Notepad or in an XML editor.

3   Go to the **Servers** section. (Search on Servers if necessary.)

4   Add the following lines:

```
<Servers>
    <Server default="true">
        <prServerName>[connection string]</prServerName>
    </Server>
</Servers>
```

The attribute **default** determines whether the connection string is selected by default in the login dialog box:

- ‣ If **true**, then the connection string is selected by default in the server menu.
- ‣ If **false** or omitted, then the connection string is listed in the server menu. The list order follows the same order the servers are listed here in the configuration file. If only one server is listed, then the connection string is selected by default in the server menu.

For more information on setting a default server, go to Servers (6-8).

5   Verify that the connection string is formatted correctly. (Go to Table 5-1: Connection string formats for DCOM, HTTP, and secure HTTP connectivity on 5-5.)

6   Save the file and close it.

7   Start AccuRoute Desktop and verify that it is configured correctly.

Configuring Group permissions for AccuRoute Desktop

Users must have permissions to use AccuRoute Desktop. Permissions, which are set in the **Configuration > Groups** node in the AccuRoute Server Administrator.

        To configure AccuRoute Desktop permissions:

1   Start the AccuRoute Server Administrator.

2   Expand the console tree and go to **Configuration > Groups**.

3   Double click the **Default** group and to any other group (you created) that should have permission to AccuRoute Desktop. The Group properties page opens.

> **Note**   The Group Default is created when you install AccuRoute Server. The members associated with the Default Group are Domain Users.

4   Click the **AccuRoute** tab to open the AccuRoute page.

5   Check the box beside **Enable members of this group as AccuRoute users**.

6   In the **Allow group to Route to** section, select the recipient types to whom messages can be routed

from AccuRoute Desktop.
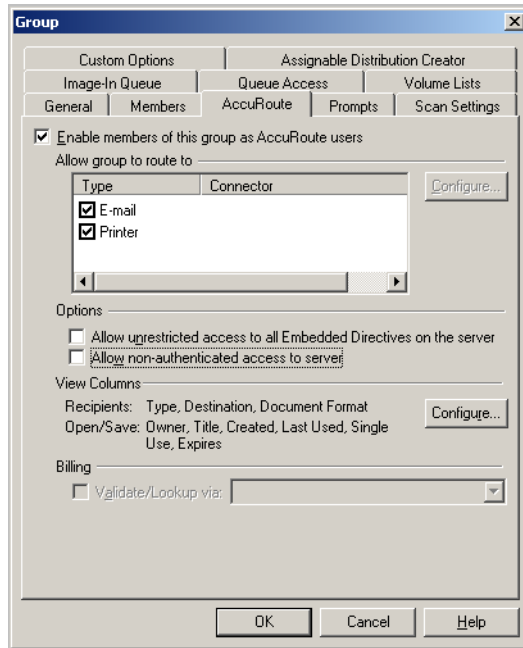
7   Click **OK** to save your changes and close the Properties page.

Tip   Permissions determine whether users can run AccuRoute Desktop and which routing destination are available to them. Access to other features is controlled through views.

For environments with an Server cluster, it is not necessary to repeat these procedures on the alternate Server. This information is stored in the AccuRoute Server database which is shared by both AccuRoute Servers in the cluster.

AccuRoute Web Apps

This section includes:

Enabling integrated Windows authentication

The AccuRoute Web Apps Client authenticates users based on their Windows logon credentials. The logon credentials are either passed transparently from the client to the web server or entered manually by the user at the beginning of each session. The login method depends on how authentication is configured.

> **Note** Windows authentication is required with NTLM authentication. Skip this section for database authentication.

Windows integrated authentication is automatically configured on the AccuRoute web server during the installation process.

However, you will need to configure the Internet Explorer for authentication on clients, as described below.

Configuring integrated Windows authentication on clients running Internet Explorer 11

You must configure Integrated Windows Authentication on all clients running Internet Explorer 11.

1 Log on to the client using an account that belongs to the local Administrators group and start Internet Explorer.

2 Open Internet Explorer and click **Tools > Internet Options**.

3 Click the **Security** option.

4 Select **Internet** or **Local Intranet** depending on your default zone, and click **Custom level**.

5 The **Security Settings** page opens.

6 Scroll down to the **User Authentication** section and make the following changes:

‣ To authenticate the Windows user transparently, select **Automatic logon with current user name and password**.

‣ To prompt the Windows user to enter logon credentials at the beginning of each session, select **Prompt for Username and Password**.

7 Click **OK** to close the **Internet Options** page.

8 Close the Internet Explorer browser.

9   Close all other open instances of Internet Explorer for the change to take effects.

Adding the Web Apps Client URL to the list of trusted sites on a client system

You must add the Web Apps Client URL to the list of trusted sites on all client systems which will browse to the Web Apps Client.

1   Log on to the client system using an account that belongs to the local Administrators group and open **Internet Options**. (It is accessible from the Control Panel or Internet Explorer.)

2   Go to the **Security** tab.

3   Select **Trusted sites** and click **Sites**.

4   Enter the **Web Apps Client URL** and click **Add**.

5   Deselect **Require server verification (https:) for all sites in this zone** if this option is selected.

6   Click **Close** to close the **Trusted Sites** dialog.

7   Click **Apply** to save the changes and click **OK** to close the dialog box.

The Web Apps Client URL is now added to the list of trusted sites. To verify that the system recognizes the Web Apps URL as a trusted site, start Internet Explorer and go to the Web Apps URL. Verify that Web Apps Client loads. (Depending on your Windows Integrated Authentication configuration, you may need to login.

Disabling Compatibility Mode in Internet Explorer 11

Using the AccuRoute Web Apps Client with Microsoft Internet Explorer 11 requires that you disable Compatibility Mode.

If you try to launch the Web Apps Client when the server name is included in the URL (for example: http://*servername*/accuroute) and Compatibility Mode enabled, the following warning message appears:

        Oops. This browser is not supported (this may be resolvable by
        disabling Compatibility View or this site).

To disable Compatibility Mode:

1   In the Internet Explorer 11 browser, click the **Tools** button.

2   Select **Compatibility View Settings**.

3   De-select the **Display intranet sites in Compatibility View** option.

You can now successfully launch the Web Apps Client on the Internet Explorer 11 browser using the server name in the URL.

Selecting a network printer

1   Be sure the printer driver is installed on the AccuRoute server. The Web Apps Client will read the list of configured network printers on the AccuRoute server.

> **Note**   Before the network printers are listed in the AccuRoute Web Apps Client, the network printers must be

added to the **Jobs > Printers** section of **Group Properties** in the AccuRoute Server Administrator. For more information on adding and configuring network printers, see the [AccuRoute Server Administrator Online Help](#).

2   Log in to the AccuRoute Web Apps Client application.

3   Click the **Preferences** tile. The **Preferences** page opens.
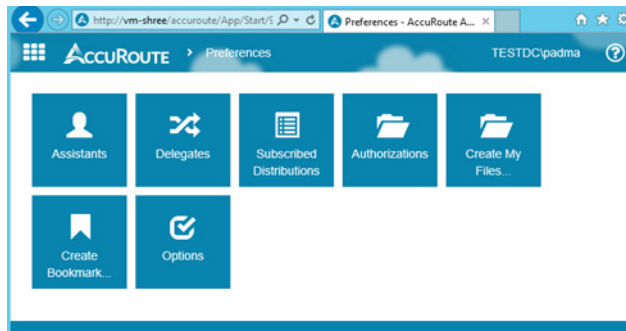
4   Click the **Options** tile to access the **Printer** field.

5   In the **Printer** field, enter the printer **Name** or **IP address** of interest and click **Save**.

Note   If you do not save your preferences, your configuration is valid for the current session only. The Web Apps Client will not remember your choices if you log out or open a new session.

AccuRoute Queue

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 AccuRoute Queue.

To configure Property Expression for AccuRoute Queue:

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

2   In the console tree, expand the AccuRoute 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.

AccuRoute Connect

This section includes:

Configuring the AccuRoute Connect node

After the AccuRoute Server Administrator has set permissions for the Active Directory groups, the Administrator must configure the AccuRoute Connect node.

To go to the AccuRoute Connect node:

1   Open the AccuRoute Server Administrator console.

2   Expand the **Configuration** node and find the **AccuRoute Connect** node.
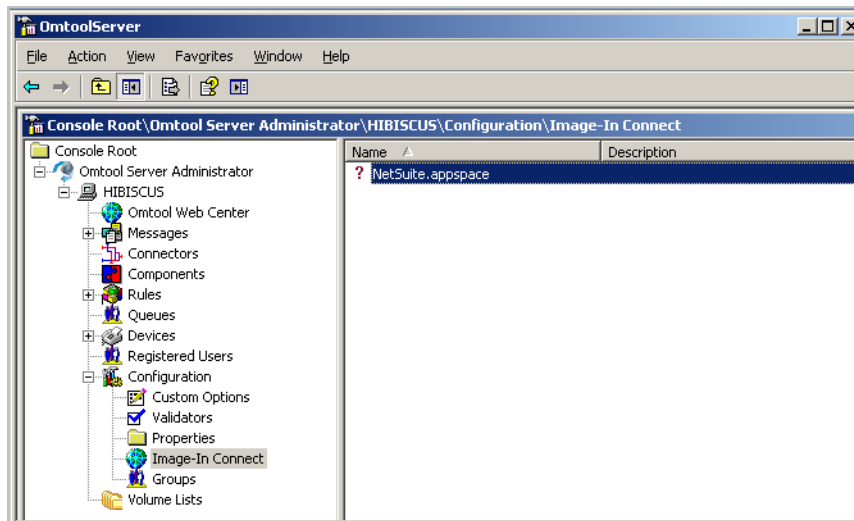
The AccuRoute Connect node lists all Appspaces defined for the AccuRoute environment. For each Appspace, the Administrator will define the Xmodel elements.

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

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

The following example shows an Appspace that has been defined for integration with a Human Resource application processing employee demographic information.
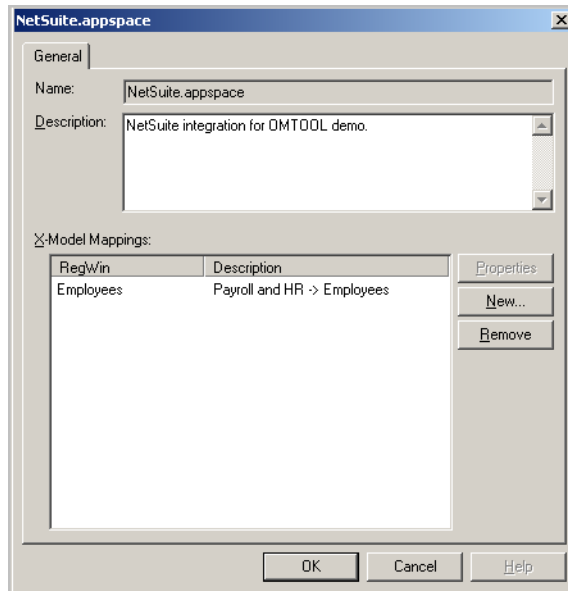
To collect employee demographic information like primary identification number, employee display name, email, phone and or fax number, the AccuRoute Server Administrator will define Xmodel elements for each individual information piece as shown below.
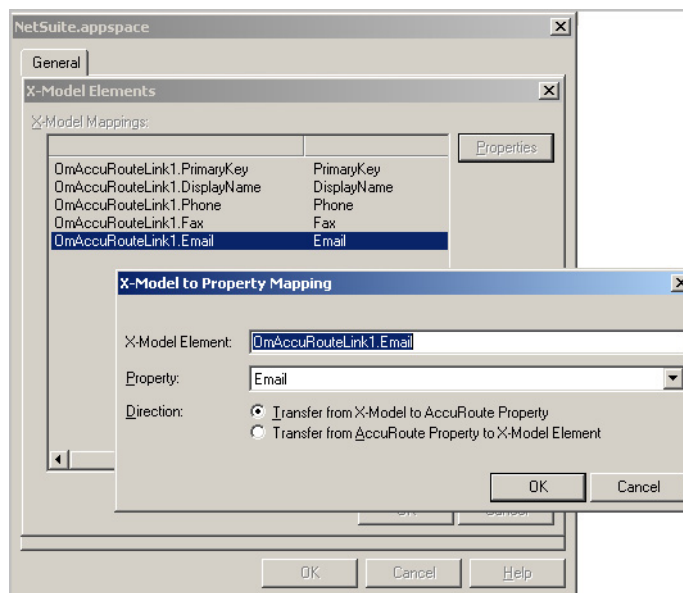
Since the AccuRoute action will populate properties from only one X-Model, when mapping properties to X-Model elements, it is important to create all the elements in one X-Model.

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

Configuring Groups for AccuRoute Connect

After you have install AccuRoute Connect, you must specify the Groups that can use AccuRoute Connect.

To configure Group permissions for AccuRoute Connect:

1   In the AccuRoute Server Administrator console, expand **Configuration** and go to the **Groups** node.

2   Double click the **Group** you should configure for AccuRoute Connect. The **Properties** page opens.

3   Open the **AccuRoute Connect** tab.

4   Select the **Enable members of this group to use the selected integrations** option.

5   Select the **AppSpaces** the Group members can use.
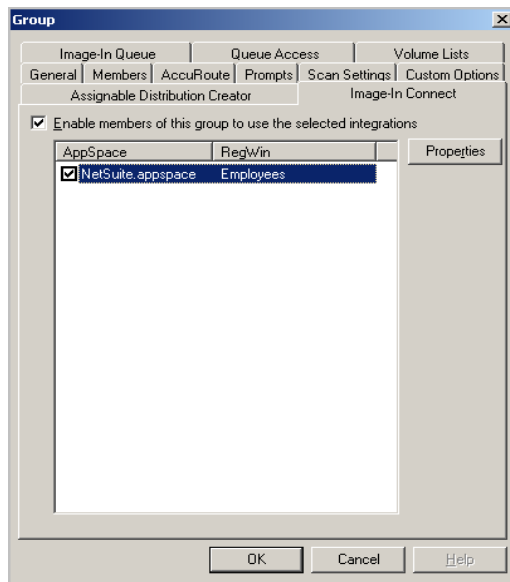
6   For each Appspace selected, click **Properties** to open the Properties page and configure as needed.

7   Select or clear the AccuRoute Connect options for the users as needed.
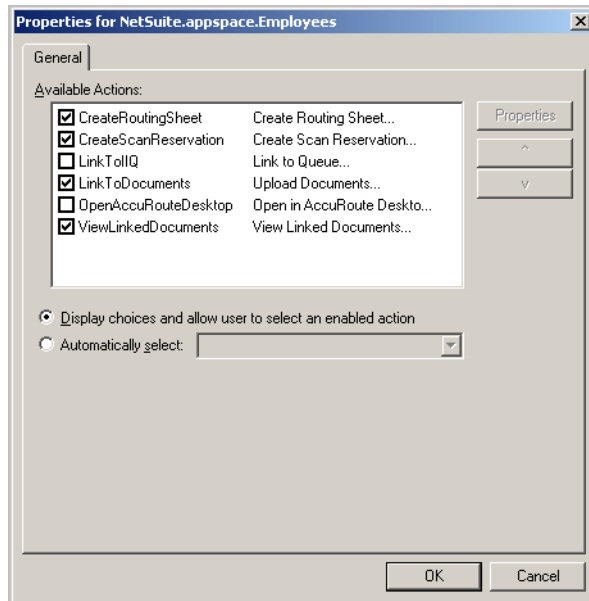
8   If you want the user to use only one of the AccuRoute Connect feature by default, select the Automatically select option and select the option for the user.
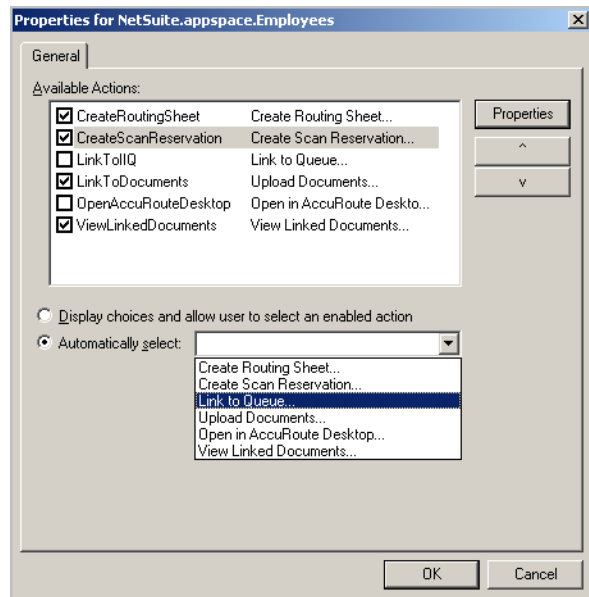
9   For each of the following features - Create a Routing Sheet feature, Create Scan Reservation, Open in AccuRoute Desktop and Upload Documents, and specify the template Embedded Directive optionally, enable prompt using the instructions below:

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

b   Click on the **Browse** button beside the **and** field and select from available Embedded Directives

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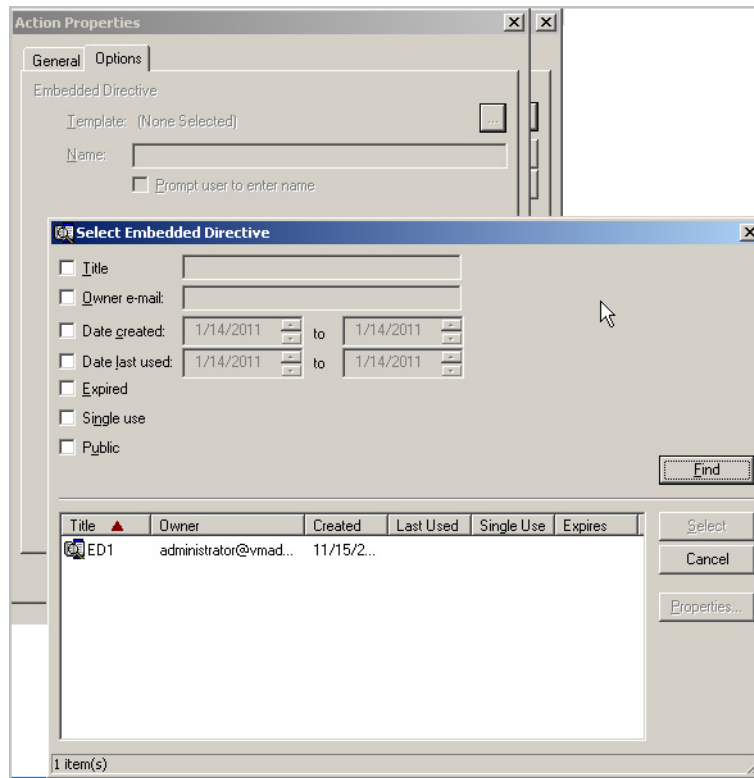
c Optionally, in the **Name** text box, provide a descriptive name for the Embedded Directive. You can also ask the user to provide a name by checking the Prompt the user to enter name option.

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

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

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

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

b Open the **Actions** tab.

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

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

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

AccuRoute Server Monitor

This section includes:

Configuring AccuRoute Server Monitor server properties

After you add an AccuRoute Server to the Server Monitor Administrator, right-click the server (or, highlight the server and click **Action** on the toolbar) to open the available options menu.

The available options are:

Properties - Select this menu item to configure options on the General and Suspend Monitor tabs.

Remove - Select this menu item to remove the server from the Server Monitor Administrator.

New - Select this menu item to create a new test.

Figure 5-A: **AccuRoute Server Monitor properties**
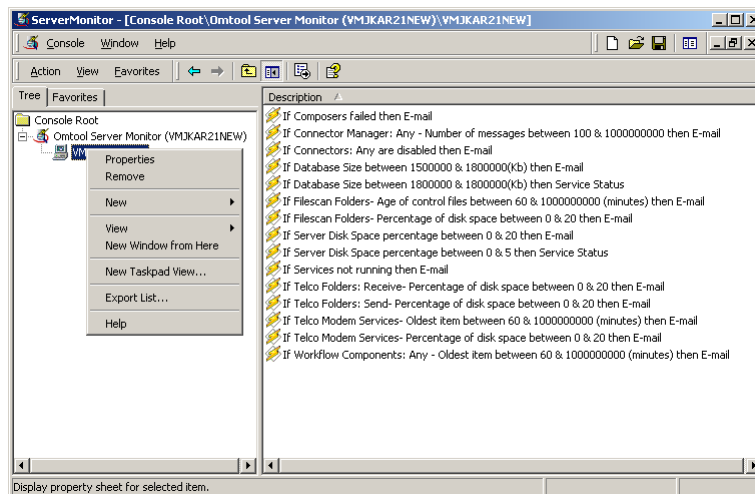
Clustering Server Monitor

When adding a clustered server to the Server Monitor Administrator, it must be active. The server icon in the AccuRoute Server Monitor Administrator changes when you add a clustered server.

If you are using a clustered server environment, please consider the following while configuring AccuRoute Server Monitor:
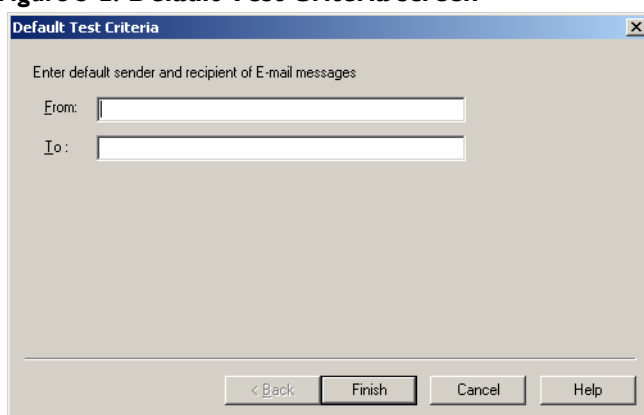
- You need to cluster a server before you add it to the Server Monitor Administrator.

- Make sure you add the preferred server in the cluster to the Server Monitor Administrator.

- If the failover time in a clustered environment exceeds 90 seconds, AccuRoute Server Monitor performs all actions specified in the Cluster Failover Action option located on the General tab of the server properties. It also performs all these actions if both the preferred and secondary servers are shut down.

- After control is moved from the preferred server to the secondary server, the test will be performed for the backup server, but the stored configurations are not updated with the backup server name.

Defining sender and recipient e-mail addresses

When you add a server to the Server Monitor Administrator, you are prompted to enter two e-mail addresses in the **Default Test Criteria** screen.

Figure 5-2: **Default Test Criteria screen**

The e-mail address in the **From** field is used as the default sender's e-mail address whenever you add a new e-mail action for your test criteria.

The e-mail address in the **To** field is used as the default recipient's e-mail address whenever you add a new e-mail action for your test criteria.

Note	The **From** and **To** e-mail addresses are also used for e-mail notifications of critical errors in a clustered environment.

Tip	You can enter multiple e-mail addresses in the **To** field by separating each e-mail address with a semicolon (;), or you can enter a distribution list address. Distribution list aliases are not supported.

You can update the e-mail addresses in the server properties at any time, as well as override the default e-mail addresses when creating new test criteria.

Defining server properties - the General tab

The General tab is where you define server properties in the AccuRoute Server Monitor.

Opening the General tab

Use the following procedure to open the General tab.

To open the General tab in the server properties:

Right-click the server and select **Properties**. (Or, highlight the server, click **Action** on the toolbar, and select **Properties**.) The **General** tab is selected by default.
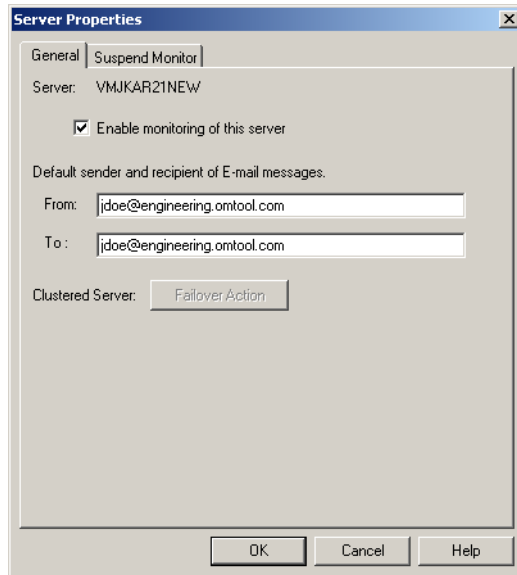
On this tab, you can:

- Enable or disable monitoring of this server by selecting or clearing **Enable monitoring of this server**. The icon displayed in the Server Monitor Administrator changes based on your selection.

- Change the sender and recipient e-mail addresses. You defined these e-mail addresses when you added the server to the Server Monitor Administrator.

- Define actions for when a failover occurs.

Tip   You can enter multiple e-mail addresses in the To field by separating each e-mail address with a semicolon (;), or you can enter a distribution list address. Distribution list aliases are not supported.

Defining failover actions

In a clustered environment, you can define the actions that happen when a failover event occurs in the cluster. For example, you can define a Failover Action that sends an e-mail if the secondary server takes over from the preferred server.

To define Failover Actions:

1   Click **Failover Action** on the Server Properties General tab. The Cluster Failover Action screen appears.

2   Specify the actions to take when a failover occurs.

Complete the wizard for the action you specified.

AccuRoute FaxCenter

This section includes:

Creating routing rules for inbound faxes

Using the following procedure, you will create an inbound routing rule that determines the faxes that should be routed to FaxCenter users. Once the server routes these faxes to FaxCenter. FaxCenter users will review each fax, determine the most appropriate recipients and destinations for the fax, and route the fax accordingly.

To create a rule for routing inbound faxes to FaxCenter:

1 Double-click **Rules** in the console tree.

2 Right-click **Inbound** and select **New | Rule**. The **Specify the Criteria for this Rule** screen appears.

3 Click the **Add** button, select a criterion for inbound faxes that should match this rule, and click **Next**.

4 Specify the parameters for the criterion you selected in the previous step and click **Finish**.

5 Add more criteria for inbound faxes that should match this rule, if needed, and click **Next**. The **Specify the Actions to take for this Rule** screen appears.

6 Click **Add**. The **Add Rule Action** screen appears.

7 Select **FaxCenter** and click **Next**. The **Route to FaxCenter** screen appears.

8 Select the **FaxCenter user** option only if you want the inbound faxes that match this rule to be routed to a particular FaxCenter user, and then select the FaxCenter user from the drop-down list. (If you do not select this option, inbound faxes that match this rule will be routed to all FaxCenter users.)

Type the number of hours a fax can reside in FaxCenter in the **Expiration Time** spin box. (If a fax has not been routed to a recipient or other destination within the allotted time, the server fails the fax and removes it from FaxCenter.)

Click **Finish**.

9 Add any other actions for inbound faxes that match this rule, if needed, and click **Next**. The If any Action(s) fail do the following screen appears.

10 Add the actions you want to apply to faxes that match this rule if any of the primary actions fail (optional), and click **Next**. The **Specify a name for this rule** screen appears.

11 Type a friendly name for the rule in the text box, and configure the other options in this screen as needed, and click **Finish**. The new rule wizard creates the rule and displays all the inbound routing rules.

Now that you have created an inbound routing rule for FaxCenter, order the inbound routing rules as needed.

Section 6: Required Configuration

This section contains a brief description of the required configurations of different AccuRoute clients.

This section includes:

The following client do not have any server configurations.

- Pint to AccuRoute

- AccuRoute in Acquisition

AccuRoute Desktop

This section includes:

Configuring address book integration in the AccuRoute Desktop setup

Address book integration in AccuRoute Desktop enables users to add message recipients from the same address book they use to send email messages. Because AccuRoute Desktop supports all contacts in the address book, including global and personal contacts, users can quickly access all the message recipients they can access from their email application. Supported email applications include:

- Outlook
- Notes
- GroupWise

The address book configuration is stored on the client, so AccuRoute Desktop can be configured to support different address books on different clients. However, each installation of AccuRoute Desktop supports only one address book: Outlook, Notes, or GroupWise. Address book integration can also be disabled.

Upland AccuRoute recommends configuring address book integration in the AccuRoute Desktop setup on the AccuRoute Server. This ensures that no configuration is required on the client after AccuRoute Desktop is installed.

By default, AccuRoute Desktop is configured to support the Outlook address book. If the default configuration is correct, skip this procedure.

> *Tip*   The address book configuration is stored in AccuRouteclient.xml. There are additional properties in this file that can be modified before AccuRoute Desktop is installed on the client.

To configure address book integration in the AccuRoute Desktop setup:

1   Log on to the system running the AccuRoute Server. Navigate to `...\Upland AccuRoute\AccuRoute\Clients\AccuRouteDesktop\program files\AccuRoute\AccuRouteDesktop`.

2   Open `AccuRouteclient.xml` in Notepad or an XML editor.

3   Go to `prMailType` and modify the value of this property using one of the following values:

   ‣ `Outlook` (default)

   ‣ `LotusNotes`

   ‣ `Groupwise`

   ‣ `None`

> **Note**   None disables address book integration. When address book integration is disabled, the user must enter the destination address of all recipients manually.

4 Save your changes and close the file.

To configure address book integration in the system running AccuRoute Desktop

1 Log on to the system running the AccuRoute Server. Copy the updated file AccuRouteclient.xml from
…\UplandAccuRoute\AccuRoute\Clients\AccuRouteDesktop\program
files\AccuRoute\AccuRouteDesktop

2 Now go to the client system where AccuRoute Desktop is already installed. Paste the file in …\AccuRoute\AccuRouteDesktop and replace the existing file.

> *Important*   For environments with an AccuRoute Server cluster, AccuRoute strongly recommends repeating this procedure on the alternate AccuRoute Server.

Using AccuRoute Desktop with an AccuRoute Connector for DMS

AccuRoute Desktop can be configured to integrate with document management systems and other specialized applications that extend the functionality of pre-existing document storage and retrieval methods. For more information on configuring DMS connectors, consult the AccuRoute DMS Libraries documentation. For general information on AccuRoute Connectors for DMSs, contact [AccuRoute Sales](#).

Configuring MyAccuRoute on the AccuRoute Server

The MyAccuRoute feature streamlines a workflow; it enables the AccuRoute Server to process all messages from the same user with the same Embedded Directive. For example, suppose a user is responsible for scanning hard copy documents at a scanning station and routing them all to the location where another user indexes and archives those documents. When MyAccuRoute is configured for the user, the AccuRoute Server always applies the Embedded Directive specified in the user's My AccuRoute configuration, which in turn specifies the destination to which to route the scanned documents.

The key aspect of this configuration is that the AccuRoute Server must be able to identify the sender so that it can apply the Embedded Directive that is selected in the user's MyAccuRoute configuration. The previous example that describes a user at a scanning station presumes that the user logs in to the scanning station and that this data accompanies the scan to the AccuRoute Server. There are other scenarios in which the user might be submitting messages repeatedly from AccuRoute Desktop.

> *Tip*   AccuRoute offers customized solutions for some device manufacturers including Xerox, HP, Sharp and Ricoh. Contact [AccuRoute Sales](#) for more information.

The configuration that supports MyAccuRoute has two required components:

- **MyAccuRoute configuration on the client** - The user must create an Embedded Directive and select it in the My AccuRoute configuration in AccuRoute Desktop. For more information, consult the AccuRoute Desktop User Guide.
- **Outbound rule on the AccuRoute Server** - An outbound rule must identify the criteria for the message, for example, the sender, and set the action so that the AccuRoute Server processes the message using MyAccuRoute.

MyAccuRoute is configured on the AccuRoute Server. Notify users that they must configure MyAccuRoute before they can begin using this feature. By default, an outbound rule already exists on the server.

For environments with an AccuRoute Server cluster, it is not necessary to repeat this procedure on the alternate AccuRoute Server. This information is stored in the AccuRoute Server database which is shared by both AccuRoute Servers in the cluster.

Configuring the Watch Folders application on the AccuRoute Server

Watch Folders is a desktop application installed with AccuRoute Desktop. A watch folder is:

- an ordinary folder residing on the client system running AccuRoute Desktop
- has been identified in AccuRoute Desktop as a "watch folder"
- has been associated with an Embedded Directive

In AccuRoute Desktop v6.0, the Watch Folders have been modified to support the following categories:

- Deliver to ED
- Deliver to Recipient (DMS only supported in this release)
- Launch AccuRoute Desktop

You can also configure the Watch Folder tray application to start at Windows starts up. It uses Virtual Filescan implementation and gathers files that are dropped in known/specified folders and then process them through the AccuRoute Server.

When the AccuRoute Desktop user wants to send a message using the Embedded Directive that has been associated with the watch folder, the user copies files to the watch folder, and AccuRoute Desktop processes those files as a message. In this way, the watch folder functions as an automatic sending queue. Similarly, when the user wants to deliver a message to a DMS, the user copies the file to the designated watch folder from where it is picked up and processed by the server and routes to the DMS.

Advantage of using Watch Folders

When the AccuRoute Desktop user wants to send a message using the Embedded Directive or a specific folder associated as a watch folder, the user copies files to the watch folder. AccuRoute Desktop processes those files as a message and sends them to the AccuRoute Server for further processing. In this way, the watch folder functions as an automatic sending queue.

The biggest advantage to using the Watch Folders therefore is that they enables users to streamline their most common workflows. Consider the following example. An executive assistant sends out a packet of materials each week to a group of people who meet weekly to discuss operations.

The executive assistant simply gathers the files that should be distributed to group members and copies them to the watch folder that was set up for this purpose. AccuRoute Desktop immediately processes the files in the folder as a single message and distributes those files using the Embedded Directive that is associated with the watch folder.

The configuration supporting the Watch Folders requires two components:

- **Watch Folders configuration on the AccuRoute Desktop client** - The user must configure the Watch Folders application and identify the local folders that should be designated as watch folders. For more information consult the AccuRoute Desktop user guide.
- **Outbound rule configuration on the AccuRoute Server** - An outbound rule must identify outbound messages with an Embedded Directive and allow the Embedded Directive Manager component to process these messages using the Embedded Directive specified in the user's Watch Folders configuration.

To create an outbound rule on the AccuRoute Server for the Watch Folders application:

1 Start the AccuRoute Server Administrator.

2 Expand **Rules** in the console tree.

3 Right-click **Outbound** and select **New > Rule**. The rules wizard appears on the desktop.

4 Click the **Add** in the **Specify the Criteria for this Rule** window. Select **Embedded Directive** in the list of criteria and click **Next**. Select **is**, enter *, and click **Add**. Click **Finish**. The criteria **Where Embedded Directive is *** appears in the list. Click **Next**.

5 Click the **Add** in the **Specify the Actions to take for this Rule** window. Select **Route to Embedded Directive Manager** and click **Next**. Select **Use sender-specified Embedded Directive** and click **Finish**. The action **Use the Embedded Directive Manager to determine actions** appears in the list. Click **Next**.

6 Click **Next** in the **If any Action(s) fail do the following** window.

7 Verify that **Stop processing other rules** is selected and click **Finish**.

> **Note** This rule identifies all outbound messages with an Embedded Directive. If the AccuRoute Server has more than one rule that identifies messages with an Embedded Directive, review the list of rules and verify that the rule order produces the correct results.

The Watch Folders application is configured on the AccuRoute Server. Notify users that they must configure the Watch Folders application before they can begin using this feature.

For environments with an AccuRoute Server cluster, it is not necessary to repeat this procedure on the alternate AccuRoute Server. This information is stored in the AccuRoute Server database which is shared by both AccuRoute Servers in the cluster.

Modifying the AccuRoute Desktop configuration file

The AccuRoute Desktop configuration file, AccuRouteclient.xml, provides configuration data to AccuRoute Desktop on startup. The configuration data includes the name of the view that AccuRoute Desktop loads on startup in standard mode, the email application that provides address book support to AccuRoute Desktop, the search folders that contain view files and Routing Sheet template files, and the AccuRoute Server in the network.

AccuRouteclient.xml can be modified before or after AccuRoute Desktop is installed on the client. If AccuRouteclient.xml is modified after AccuRoute Desktop is installed on the client, push the file out to `…\AccuRoute\AccuRouteDesktop` on the client and replace the existing file.

Modify `AccuRouteclient.xml` using the guidelines in the following table. The major sections of the file appear

in bold typeface.

Table 6-1: **Guidelines on modifying elements in AccuRouteClient.XML**

Element	Parent	Description
Configuration	—	Root element.

AppData	Configuration	Section containing application data that AccuRoute Desktop reads on startup. It identifies the view file that AccuRoute Desktop loads on startup in standard mode and the email system on the client. For example:
		
		`<Configuration>`
		`    <AppData>`
		`        <prDefaultView>$/Default.view</prDefaultView>`
		`        <prMailType>Outlook</prMailType>`
		`    </AppData>`
		`    …`
		`</Configuration>`

	AppData	The AppData section supports the following properties:
		
		• **prDefaultView** - Filename of the view that AccuRoute Desktop loads on startup in standard mode. For example:
		`<AppData>`
		`    <prDefaultView>$/Default.view</prDefaultView>`
		`    …`
		`</AppData>`
		• **prMailType** - Email application that provides address book support to AccuRoute Desktop. (For a list of email applications and versions that have been qualified with AccuRoute Desktop, go to [Section 3: Requirements](#).) For example:
		`<AppData>`
		`    …`
		`    <prMailType>LotusNotes</prMailType>`
		`</AppData>`
		
		  Use any of the following values:
		
		  ‣ `Outlook`
		  ‣ `LotusNotes`
		  ‣ `Groupwise`
		  ‣ `None` (Requires the user to enter the addresses of email recipients and fax recipients manually.)

HelpSystem	Configuration	Section indicating the location of the AccuRoute Desktop user guide. Do not modify these values.

Table 6-1: **Guidelines on modifying elements in AccuRouteClient.XML**

Element	Parent	Description

SearchFolders	Configuration	Section identifying all the folders in the network that contain view files (*.VIEW) and Routing Sheet template files (*.WTX, *.OMTPL, *.DOC).
		
		The optional attribute **overridable** determines whether the user can expand the list of search folders. If overridable="true", the user can add folders to the Configuration Folders list, and then delete or modify only the folders that the respective user added. If overridable="false", the user cannot add folders to the Configuration Folders list.
		
		For example:
		<pre><Configuration>
		    …
		    <SearchFolders overridable="false">
		        …
		    </SearchFolders>
		    …
		</Configuration></pre>
		Note: A search folder does not include its subfolders. Each folder containing view files or Routing Sheet template files must be defined individually.

Folder	SearchFolders	Section identifying a folder in the network that contains view files (*.VIEW) and/or Routing Sheet template files (*.WTX, *.OMTPL, *.DOC). For example:
		<pre><SearchFolders overridable="true">
		    <Folder>
		        <prName>RSTemplates<\prName>
		    </Folder>
		    …
		</SearchFolders></pre>

		The Folder section supports the following properties:
		
		• **prName** - Folder that contains view files (*.VIEW) and/or Routing Sheet template files (*.WTX, *.OMTPL, *.DOC). Use any of the following values:
		
		‣ alias such as General views (Go to [Aliases](#) on 6-9.)
		‣ %InstallFolder% to represent …\AccuRouteServer\AccuRouteViews on the AccuRoute Server
		‣ UNC path such as \\computer\folder
		‣ local path such as c:\folder or c:\folder\
		
		For example:
		<pre><Folder>
		    <prName>%InstallFolder%<\prName>
		</Folder></pre>

Table 6-1: **Guidelines on modifying elements in AccuRouteClient.XML**

Element	Parent	Description
Servers	Configuration	Section defining the AccuRoute Servers in the network. AccuRoute Desktop must establish a connection to the AccuRoute Server before allowing a user to begin a session. The optional attribute **autoconnect** determines whether AccuRoute Desktop prompts the user to login and select an AccuRoute Server. Use true to enable autoconnect, or false to disable autoconnect. For example:

```
<Configuration>
        …
        <Servers autoconnect="true">
                <Server default="true">
                        <prServerName>LANGSTON</prServerName>
                </Server>
        </Servers>
        …
</Configuration>
```

If autoconnect="true", AccuRoute Desktop connects to the AccuRoute Server automatically. AccuRoute Desktop authenticates the user based on the user login to the email application. Consider the following autoconnect scenarios:

• If the email application is configured to start automatically and autoconnect="true", AccuRoute Desktop suppresses the **Connect to Server** dialog box on startup and connects to the AccuRoute Server automatically.
• If the email application is configured to prompt the user to select an identity/ profile and autoconnect="true", the user selects an email identity/profile and then AccuRoute Desktop connects to the AccuRoute Server.
• If the element prMailType uses the value None (See the description of prMailType on 6-6.) and autoconnect="true", the user must complete the **Connect to Server** dialog box on startup. After providing a name and e-mail address, the user must select **Always connect to this server**. Then AccuRoute Desktop connects to the AccuRoute Server automatically.

Note: If autoconnect="true", include only one AccuRoute Server in the <Servers> section or set default="true" on the AccuRoute Server that AccuRoute Desktop should connect to automatically.

If autoconnect="false" or if the attribute is not set, AccuRoute Desktop prompts the user to select an AccuRoute Server and log in. A list menu displays all the AccuRoute Servers defined in this section.

Table 6-1: **Guidelines on modifying elements in AccuRouteClient.XML**

Element	Parent	Description

Server	Servers	An AccuRoute Server in the network.
		
		The optional attribute **default** determines whether the server is the default selection. Use one of the following values: true to indicate the default server, or false (default).
		
		If default="true", AccuRoute Desktop displays the server as the first item in the server list menu. This item is selected by default. If configured to autoconnect (Go to Servers on 6-8.), AccuRoute Desktop connects to the default server automatically.
		
		If default="false" and multiple servers are included in this section, or if this attribute is not present and multiple servers are included in this section, the AccuRoute Server is not the default server.
		
		The following code sample shows SAPPHIRE as the default server:
		`<Servers>`
		`    …`
		`    <Server default="true">`
		`    <prServerName>SAPPHIRE</prServerName>`
		`    </Server>`
		`    …`
		`</Servers>`

		The Server section supports the following properties:
		
		prServerName - Connection string. It must be formatted appropriately for the server-client connectivity method. (Go to Table 5-1: Connection string formats for DCOM, HTTP, and secure HTTP connectivity on 5-5.) For example:
		`<Server>`
		`    <prServerName>SAPPHIRE</prServerName>`
		`</Server>`

Aliases	Configuration	Section defining aliases for search folders. A search folder is a folder in the network that contains view files (*.VIEW) and/or Routing Sheet template files (*.WTX, *.OMTPL, *.DOC). (See the description of **prName** on 6-7.) For example:
		`<Configuration>`
		`    …`
		`    <Aliases>`
		`        <Alias>`
		`            <prAlias>General views</prAlias>`
		`            <prValue>\\LANGSTON\`
		`             AccuRouteServer\AccuRouteViews\`
		`            </prValue>`
		`        </Alias>`
		`        …`
		`    </Aliases>`
		`    …`
		`</Configuration>`

Table 6-1: **Guidelines on modifying elements in AccuRouteClient.XML**

Element	Parent	Description
Alias	Aliases	Section defining an alias for a search folder. A search folder is a folder in the network that contains view files (*.VIEW) and/or Routing Sheet template files (*.WTX, *.OMTPL, *.DOC). (See the description of **prName** on 6-7.) For example:

```
<Aliases>
     <Alias>
          <prAlias>General views</prAlias>
          <prValue>\\LANGSTON\
          AccuRouteServer\AccuRouteViews\
          </prValue>
     </Alias>
     …
</Aliases>
```

Important! Do not delete the default alias $/. It is required for the Send To AccuRoute Desktop feature.
The default alias is defined in AccuRouteclient.xml:

```
<Aliases>
     <Alias>
          <prAlias>$/</prAlias>
          <prValue>\\server\AccuRouteViews\</prValue>
     </Alias>
     …
</Aliases>
```

The Alias section supports the following properties:

- **prAlias** - Alias, or friendly name, for a search folder. A search folder is a folder in the network that contains view files (*.VIEW) and/or Routing Sheet template files (*.WTX, *.OMTPL, *.DOC). (See the description of **prName** on 6-7.) For example:
```
<Alias>
     <prAlias>General views</prAlias>
     …
</Alias>
```

- **prValue** - Path to the search folder. Use one of the following values:
  - ‣ %InstallFolder% to represent …\AccuRouteServer\AccuRouteViews on the AccuRoute Server
  - ‣ UNC path such as \\computer\folder or \\computer\folder\
  - ‣ local path such as c:\folder or c:\folder\

  I   For example:
```
<Alias>
     …
     <prValue>%InstallFolder%</prValue>
</Alias>
```

AccuRoute Web Apps

This section includes:

Configuring required COM permissions for launching the remote Web Apps

If your Web Apps Client is installed on a remote system (separate from that of the AccuRoute Server), you must configure COM permissions for Anonymous_logon on the AccuRoute server.

To do so:

1   Log in to the system running the AccuRoute server using an account that belongs to the Administrator.

2   Click **Start > Control Panel > Administrative Tools > Component Services**.

3   In the console, expand **Component Services > Computers**.

4   Right-click **My Computer** and select **Properties** from the drop-down menu.

5   Click **COM Security**.

6   In the **Access Permissions** section, click **Edit Limits**. The **Access Permission** page opens.

7   For user **Anonymous_logon**, select **Local Access** and **Remote Access** permissions.

8   Click **OK** to close the page.

9   In the **Launch and Activate Permissions** section, click **Edit Limits**. The **Launch Permissions** page opens.

10 For user **Anonymous_logon**, select **Local Launch**, **Remote Launch**, **Local Activation**, and **Remote Activation** permissions.

11 Click **OK** and then **OK** again to close the **Properties** page.

Creating a new Web Apps Client Profile

During installation, the system automatically creates default Web Apps Client profiles. To create additional profiles:

1   In the AccuRoute Server Administrator, go to the **Configuration** node and right-click **Web Apps > New > Profile. The New Profile Properties screen appears.**

2 Enter a profile **Name**, and optionally, a **Description**.
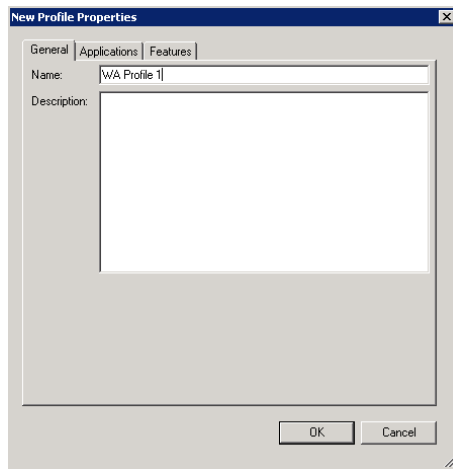
3 Go to the **Applications** tab, click **Add** and (one at a time) select the applications of interest from the various options in the drop-down menu.
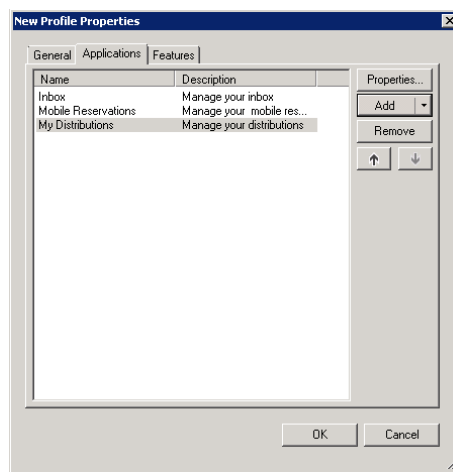
4 For example, click **Add > Messages > Inbox**. The **Inbox Application Properties** screen opens. Here you can further refine specific Inbox properties as needed.
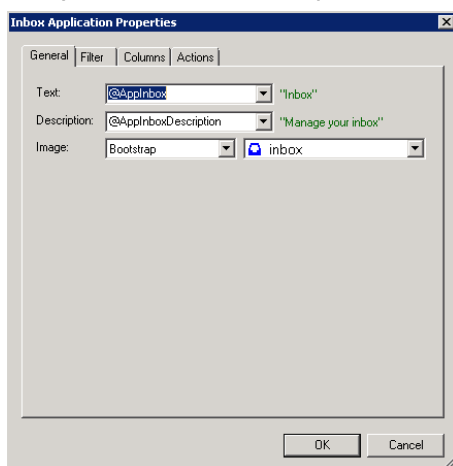
5 Click **OK** to exit the application **Properties** screen. When you return to the **New Profile Properties** screen, you will see the selected Application added to the list.

6 In the **Features** tab, click **Add** and select any Feature you want to associate with the Profile. Options include: **DocumentLink**, **Favorites**, **PrintToWeb**, **ScanToWeb**, and **SendToWeb**.
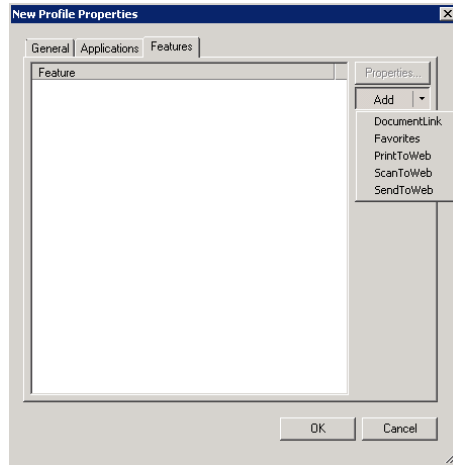
7 As it does with Applications, a **Properties** screen appears for any Feature you select. You can further refine a Feature's characteristics in its **Properties** page.
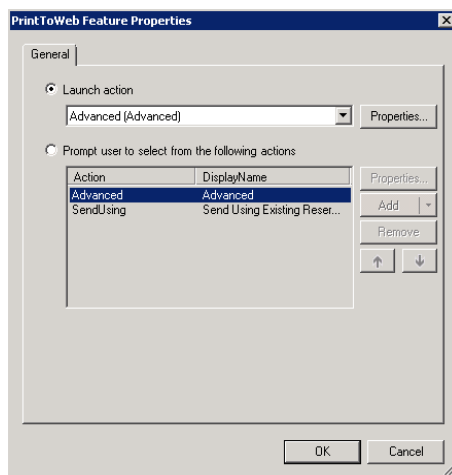
8 Click **OK** to exit the **Features Properties** screen, and click **OK** again.

9 Your new profile appears in the Web Apps list.

To edit properties of an existing Profile, right-click the profile of interest and select **Properties** to access **Profile Properties**.

Adding a Web Apps Client Profile to a User Group

1   Go to **Configuration > Groups**, right-click the group of interest and select **Properties**.

2   In the **Group Properties** screen, click **Clients > Web**.
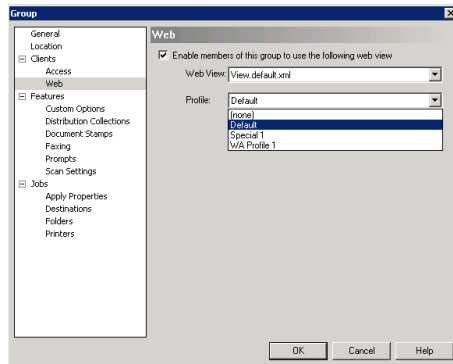
Make sure **Enable members of this group to use the following web view** is selected.

3   Click the **Profile** drop-down list and select the Profile of interest. Click **OK**.

The user group is now updated to use the new Profile in Web Apps.

Configuring prompts and additional custom options

See the AccuRoute v6.0 documentation page.

AccuRoute Queue

This section includes:

Connecting to AccuRoute Queue

To connect to the AccuRoute Queue Queue application:

1   Login to the system as a member of a Group with access rights to AccuRoute Queue.

Note   When you launch AccuRoute 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 AccuRoute 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 AccuRoute 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 > AccuRoute> AccuRoute Queue** to launch the application.

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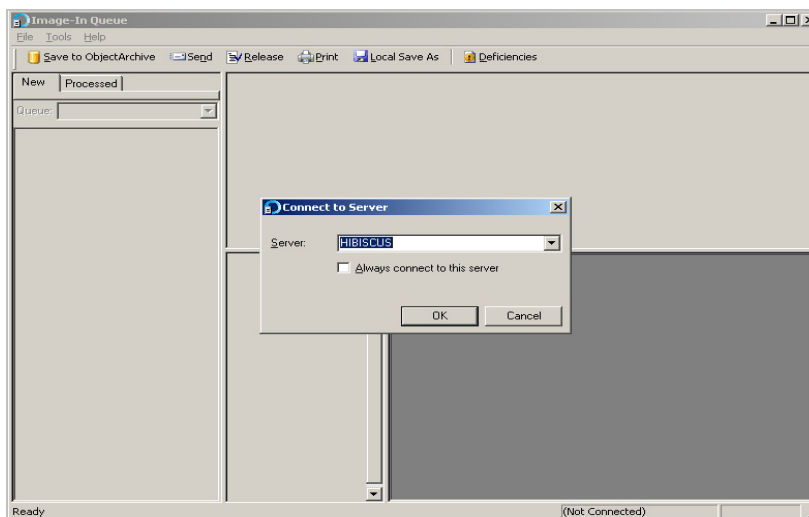
4   In the **Server** drop down, select the AccuRoute Server name and enter the IP address of the AccuRoute Server. Alternately, manually enter the name of the AccuRoute Server.

5   Click **OK**.

AccuRoute Connect

This section includes:

Configuring Queue Workflow rule for Link to Queue feature

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

To configure the External Application Queue workflow rule:

1 In the AccuRoute Server Administrator, go to the **Queues** node.

2 Select a Queue to configure. The **Properties** page opens.

3 Open the **Workflow** tab.

4 Click **Add** to open the **Queue Workflow Rules Properties** page.

5 In the **Description** text box, enter the name for the workflow, for example, ExternalApp.

6 In the **Criteria** section, click **Add**. The **Add Workflow Criteria** page opens.

7 Select **Property Dictionary Item** and click **Next**.

8 Select the property from the drop down list. Next select the **is valid** option and click **Finish**.

9 In the **Action** section, click **Configure**. The **Configure Action Workflow** page opens.

10 Select **External Application** and click **Next**.

11 In the **Application Code** text box, enter **IIC** and click **Finish**.

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

Queue workflow configuration is complete.

AccuRoute COM API

This section includes:

AccuRoute Intelligent Device Client objects

The AccuRoute COM API supports the following objects:

- **EmbeddedDirective** object - Represents an embedded directive. (An embedded directive is an encoded key that represents a set of routing instructions.)
- **EmbeddedDirectiveTemplate** object - Represents a routing sheet template.
- **Message** object - Represents a message on the AccuRoute server. (A message has at least one recipient or destination and at least one attachment.)
- **MessageAttachment** object - Represents a file attachment to a message.
- **MessageRecipient** object - Represents the recipient or destination of a message.
- **MessageServer** object - Represents the message server.
- **RecipientJournal** object - Represents the message journal. (The message journal is a log of events pertaining to the message; each time the server acts on a message, it adds an event to the journal and indicates whether the action was successful. If the action failed, the description of the event usually indicates the reason for the failure.)
- **ServConnect** object - Represents a connection to the message server.
- **User** object - Represents a user within your organization.
- **UserDelegate** object - Represents a delegate. A delegate is a user who can manage the messages of another user, and/or send messages on behalf of another user.

Figure 6-1: **AccuRoute Intelligent Device Client objects and their relationships**
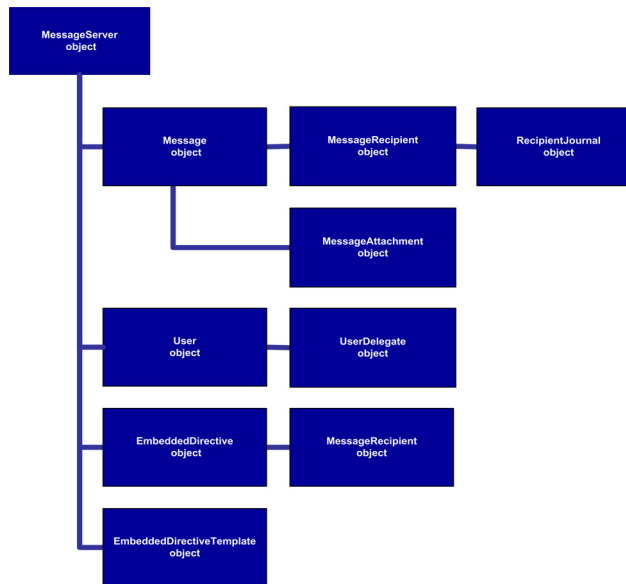
The Message Server object exposes the Message object (which exposes the Message Recipient object and the Message Attachment object), the Embedded Directive object (which exposes the Message Recipient object), the Embedded Directive Template object, and the User object (which exposes the User Delegate object).

AccuRoute CostRecovery

This section includes:

Overview of AccuRoute CostRecovery configuration

After installing AccuRoute CostRecovery, you need to configure it to collect the type of information you need for your billing system. You can also configure the format the program uses to save information so that your billing system can read the information from the AccuRoute CostRecovery reports, and the price for the number of pages sent in faxes or e-mail messages.

You can configure:

- The names and location of files that AccuRoute CostRecovery uses in the process of collecting information and generating reports for your billing system. These files include the output file generated by AccuRoute CostRecovery, the template file used to format output, and log files to which AccuRoute CostRecovery writes information about its processing. See Configuring AccuRoute CostRecovery file locations (6-19).

- The type of information collected and the format of the information in the output report that AccuRoute CostRecovery generates. The type of information available for collection differs depending on whether you use AccuRoute CostRecovery with Genifax or AccuRoute. See Working with fields, delimiters, and masks (6-22).

- Whether AccuRoute CostRecovery includes entire billing codes or only portions of the billing codes. If only a portion of the billing codes is used, you can configure how AccuRoute CostRecovery extracts that portion from the whole billing code. See Including billing codes in AccuRoute CostRecovery output (6-29).

- The prices AccuRoute CostRecovery assigns to message transactions. The transactions available for pricing differ depending on whether you use AccuRoute CostRecovery with Genifax or AccuRoute.

Configuring AccuRoute CostRecovery file locations

AccuRoute CostRecovery uses or creates a number of files in the process of collecting information about message transactions. You can configure the names of these files and their locations if you want to specify names different from the default names. The files for which you can configure this information are:

- **Output File** - This is the file that AccuRoute CostRecovery generates when it runs and collects information from Genifax or AccuRoute. You must specify this information before AccuRoute CostRecovery can run properly. By default, the output file is called `cr.txt`, and is located in the installation directory for Genifax or AccuRoute. For example: `\Program Files\AccuRoute\AccuRoute CostRecovery\cr.txt`

- **Template File** - This is the file that AccuRoute CostRecovery uses to generate the output file. By default, this file is called `AccuRoute CostRecovery.txt`.

| Note | The template file specifies the type of information AccuRoute CostRecovery collects as well as the format in which it saves the information. You should configure this information according to the requirements of your company and your billing system. See Working with fields, delimiters, and masks (6-22). |

- **Temporary File** - AccuRoute CostRecovery uses this file in the collection process. This file is removed at the end of the process. By default, this file is called `AccuRoute CostRecovery.tmp`.
- **Log File** - AccuRoute CostRecovery writes to this file each time it runs. It writes a brief summary of the export process, including the date and time at which AccuRoute CostRecovery runs, the status of the collection, and how many message transactions were collected, and whether any errors were encountered. By default, this file is called `AccuRoute CostRecovery.log`.
- **Server Name** - This option is not a file, but the name of the Genifax or AccuRoute server to which AccuRoute CostRecovery must connect to collect information about the calls made, the messages sent, or other document transactions that occur. This option is initially set during the installation of AccuRoute CostRecovery, but can be modified at any time.

This section includes:

Selecting the location of the AccuRoute CostRecovery output file

The output file that AccuRoute CostRecovery generates each time it runs should be stored in a location to which either the employees who process accounting information or your billing system have access. If your billing system can automatically retrieve the output file from a particular location, configure AccuRoute CostRecovery to save the file to the appropriate location. If the folder to which the output file is saved is located on a separate system from your billing system, ensure that the folder is shared with the necessary permissions so the billing system can access the file.

Configuring the names and locations of AccuRoute CostRecovery files

To configure the names and locations of AccuRoute CostRecovery files:

1   Start AccuRoute CostRecovery and click **Configure** in the **Standard** group in the left column.
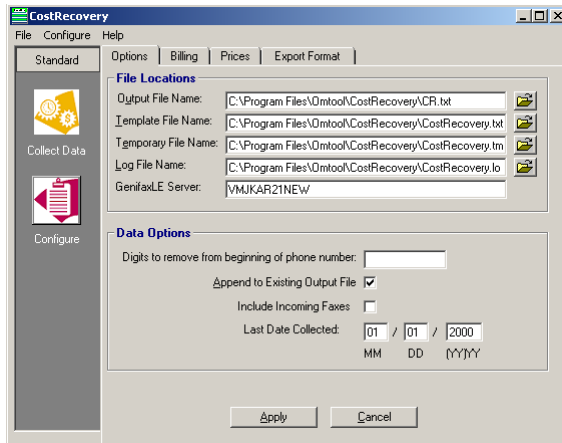
2   Go to the fields under **File Locations** in the **Options** tab, and enter the full path to and name of the AccuRoute CostRecovery file as you want it to be, or click the open folder button beside the appropriate file's field to select the location.

> **Note**   You need only modify the name and location of the files you want to modify; you can leave the other files with their default settings.

3   Click **Apply** to save your changes.

Configuring output data

AccuRoute CostRecovery saves the information it collects from or AccuRoute to an output file, which you then import into your billing system. You can customize the output to meet the needs of your billing system and your company. You can:

- Specify the name and location of this file. (Go to Configuring the names and locations of CostRecovery files on 6-20.)
- Configure the type of information AccuRoute CostRecovery collects, as well as the format in which it saves the information in the output file. (Go to Configuring the export format and creating the template file on 6-22.)
- Configure the removal of certain digits from the dialed fax number if your phone system requires extra digits to be dialed. (Go to Configuring the removal of digits from fax numbers on 6-28.)

The type of information collected and the format in which it is saved in the AccuRoute CostRecovery output file is specified in a template file. You do not need to modify the file itself; when you make changes on the **Export Format** tab in AccuRoute CostRecovery, the information is automatically stored in the template file.

Using the skip list to omit message types

CostRecovery can omit messages that do not contain billing data. A skip list is located in the configuration file `LFCostRecoveryU.ini`. Items can be added based on a destination field type containing a destination field type value. For example,

A skipped item consists of three components:

- **TS number** - An item in the TrxSkipList section must appear on a separate line, and the line must be begin with a TrxSkipList identifier. The identifier is simply a way to identify each item in the skip list. The formula for creating an identifier is TS+1. If the first item in the skip list has the identifier TS1, the second item is TS2, the third item is TS3, and so on. This identifier ensures that CostRecovery parses the codes correctly.
- **destination field code** - The destination field code is a code that represents the field that is used as the key to identifying items that should be skipped. For example, if you want to identify
- **destination code** -

  To add an item to the skip list:

1 Log on to the AccuRoute server, go to `...\AccuRoute\CostRecovery`, and open `LFCostRecoveryU.ini` in Notepad.
2 Go to `[TrxSkipList]`. It is the last section in the file.
3 Add or modify the items as preferred.
4 Save and close the file.

This section includes:

Working with fields, delimiters, and masks

Your billing system may require that information in the AccuRoute CostRecovery file it imports be in a specific format. This can include the order of the information in the file and the delimiter used to separate the information in the file. The type of information collected and the format of that information is defined by the AccuRoute CostRecovery template file. AccuRoute CostRecovery uses the template as a guide for creating the output file.

Information that is written to the AccuRoute CostRecovery output file is represented in the template file by field names. The list of fields in AccuRoute CostRecovery from which you can select uses the common text descriptions of the information the fields hold, not the actual field names (for example, you will see "Second billing field (Client)" instead of the field name, "<Billing2>"). When you add a field to the template file, the field at the bottom of the **Export Format** tab shows the actual field name, along with the selected delimiter and a mask, if specified.

AccuRoute CostRecovery supports a number of delimiters to separate information in the template. The delimiter is

also used to separate information in the output file. Supported delimiters include a comma (,), semi-colon (;), colon (:), pipe (|), dash (-), and a tab. Use the appropriate delimiters for your billing system. Consult your billing system documentation for more information about its requirements.

If the data represented by a field you add contains the delimiter you use to separate the fields from one another (for example, Robert Jones, Marketing Administrator), use the **Surround Strings with Quotes** option to enclose that field between quotation marks. This prevents the data in the output file from being misread. For example, if the data that replaces a field contains a comma and you use a comma to delimit the fields, the data before the comma will be read separately from the data after the comma. For example: *Robert Jones, Marketing Administrator* will be read as *Robert Jones* and *Marketing Administrator* unless the entire field is surrounded in quotes ("Robert Jones, Marketing Administrator").

A mask is a way of specifying the pattern or format AccuRoute CostRecovery uses when adding information to the output file. A mask can also define the specific information that AccuRoute CostRecovery places in the output file, which is helpful if your billing system needs only a portion of information provided by Genifax, or AccuRoute (for example, the last four digits of a seven-digit billing code). Your billing system may expect information to be in a specific format when it reads the output file from AccuRoute CostRecovery. For example, you may want to include the date and time at which a message was sent, and because your billing system expects this information in a specific format, you can apply a mask to this field so the information is correctly formatted.

Masks are also used when your billing system requires information in fields of fixed length. To handle fixed length output, use a mask instead of a field delimiter. The mask should ensure that each field is the proper length. For example, if your billing system requires the cost of the message to be a five digit field with a decimal point (a total length of six characters), the mask you use would ensure that the output is always six characters—for example, the mask would format `1.50` as `001.50`.

Configuring the export format and creating the template file

1   Start AccuRoute CostRecovery and click **Configure** in the Standard group in the column on the left and click the **Export Format** tab.
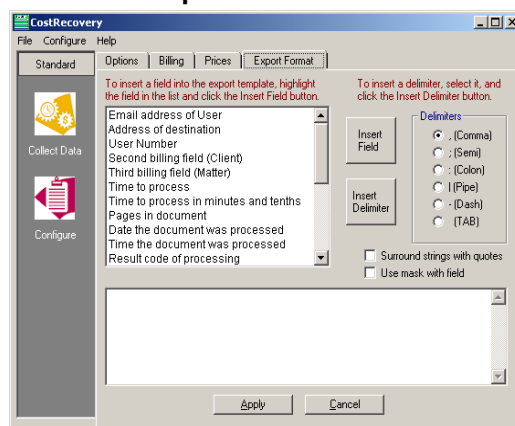
2   Add all required fields with the appropriate delimiters and masks if necessary. See Adding fields and delimiters (6-24) and Adding a field with a mask (6-26) on page 18.

3   Place the cursor after the last field in the display list box on the **Export Format** tab and press **Delete** several times to ensure that no blank lines remain at the end of the template file.

4   Click **Apply** to save your changes to the AccuRoute CostRecovery output file.

Tip   By default, the output file is called `cr.txt` and is located in the `\Program`

`Files\AccuRoute\AccuRoute CostRecovery` folder. You can specify the name and location of the output file if you want to have AccuRoute CostRecovery store the information in a different location, or if your billing system expects a different file name. See Configuring the names and locations of AccuRoute CostRecovery files (6-21).

Adding fields and delimiters

1   Go to the **Export Format** tab of the AccuRoute CostRecovery window, and select the field you want to add from the list box.
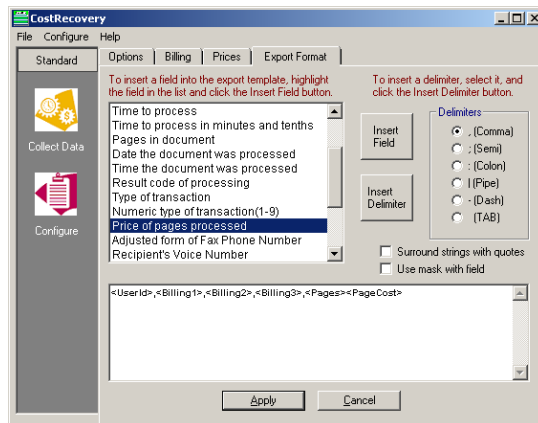
2   Select **Surround strings with quotes** if the information represented by the selected field needs to be enclosed in quotation marks in the output file.

3   Click in the list box at the bottom of the `Export Format` tab to place the cursor where you want to insert the field.

4   Click **Insert Field** to add the field to the list box. The selected field appears in the display list box
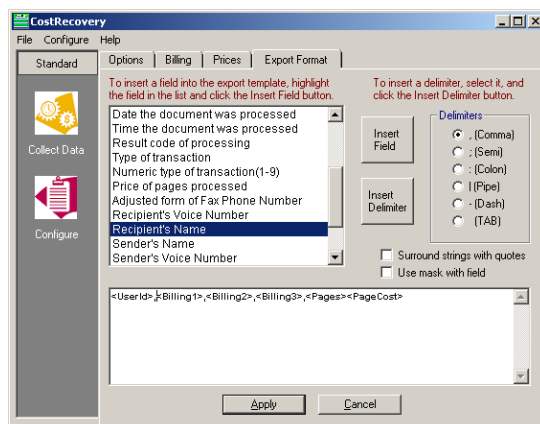
where the cursor was located.

Tip   If any of the fields you add require a mask, refer to the following section.
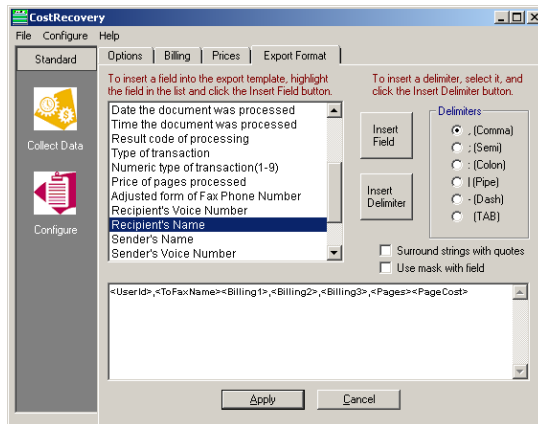
5   Go to the **Delimiters** list, and select the delimiter you want to separate the field you just added from the next field you add.

6   Click **Insert Delimiter**. The delimiter appears in the display list box after the last field you added (or where the cursor was located).
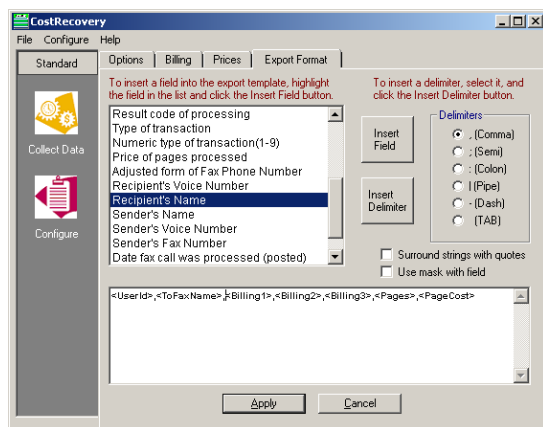
Adding a field with a mask

1 Go to the **Export Format** tab of the AccuRoute CostRecovery window, and select the field you want to add from the list box.
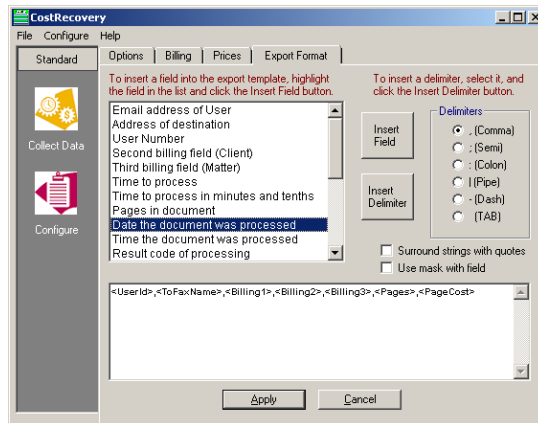
2 Select **Surround strings with quotes** if the information represented by the selected field needs to be enclosed in quotation marks in the output file.

3 Select **Use mask with this field**.

4 Click in the list box at the bottom of the **Export Format** tab to place the cursor where you want to insert the field.
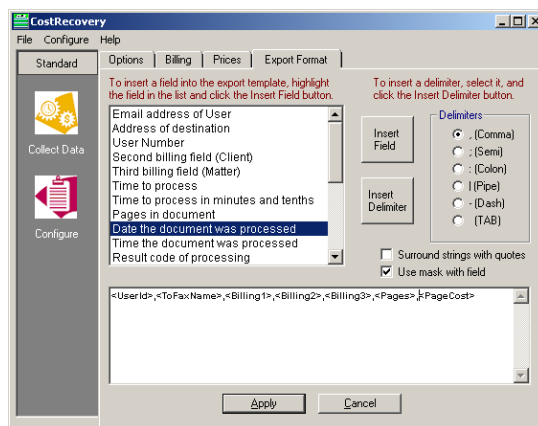
5 Click **Insert Field**. The **Enter Mask for Field** dialog box appears.
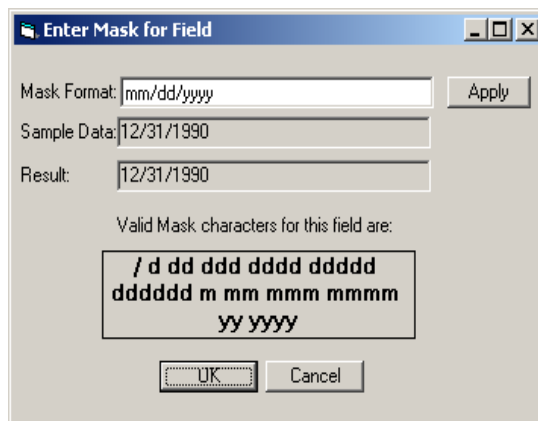
6   Go to the **Mask Format** field and enter the format for the information as you want it to appear in the output file.

The **Valid Mask Characters for this field are** box shows the valid characters you can include in the mask for the selected field. The characters listed here vary depending on the field you selected. All of the possible characters are described in <u>Appendix: Supported Mask Characters</u>.

For example, for the selected field (Date), you might want the date the message was sent to be formatted "Mon Dec 30 1990." To create a mask to format the date in this way, you would enter the following text in the Mask Format field: ddd mmm dd yyyy

You can include separators in the date, such as a comma (Mon, Dec 30, 1990). The format of the mask would appear as follows: ddd, mmm dd, yyyy

7   Click **Apply** to test the specified mask.

AccuRoute CostRecovery applies the mask you specified to the sample data listed in the **Sample Data** field, and displays the result in the **Result** field.

8   Make changes to the specified mask if needed based on the results of the test.

9   Click **OK** to add the field with the mask. The selected field appears in the list box where the cursor is located; the field includes the mask.
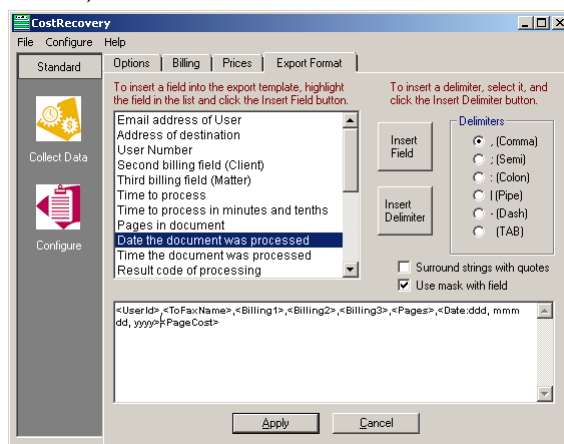
10   Add a delimiter to follow the field you just added. See <u>Adding fields and delimiters</u> (6-23) for information about adding a delimiter.

Appending and overriding output data

By default, AccuRoute CostRecovery appends new report information to the output file each time it runs. You can disable this option if you want to have AccuRoute CostRecovery overwrite the output file each time it runs. AccuRoute recommends that you leave the default and configure your billing system to delete the output file after importing it. This is recommended especially if AccuRoute CostRecovery runs automatically each day. This ensures that no data is lost if for some reason the import of the information into your billing system fails.

To configure AccuRoute CostRecovery to overwrite the contents of the output file each time it executes:

1   Start AccuRoute CostRecovery and click **Configure** in the Standard group in the column on the left.
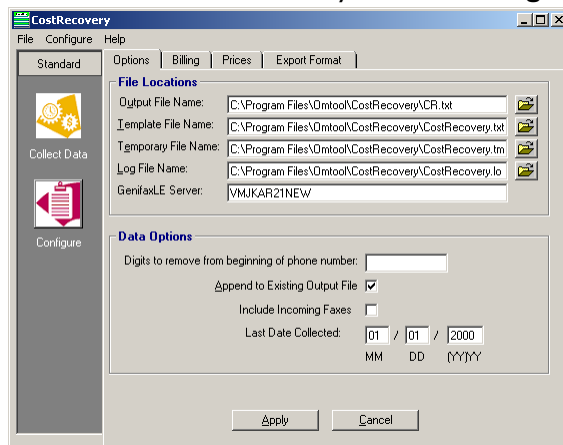
2   Click the **Options** tab.

3   Clear **Append to Existing Output File**.

4   Click **Apply** to save your changes.

Configuring the removal of digits from fax numbers

Some phone systems require extra digits to be dialed prior to the phone number or fax number. These extra digits are stored in the Genifax message database with the fax numbers. In such cases, you might want to have these digits removed from the fax numbers prior to adding them to your billing system. AccuRoute CostRecovery can remove the extra digits from the fax numbers as it collects call information from Genifax.

> **Note**   This does not include the digit 9 that is commonly required to obtain an outside line. If your phone system requires only a 9, you do not need to configure the removal of extra digits from fax numbers.

To configure AccuRoute CostRecovery to remove extra digits from fax numbers:

1   Start AccuRoute CostRecovery and click **Configure** in the Standard group in the column on the left.
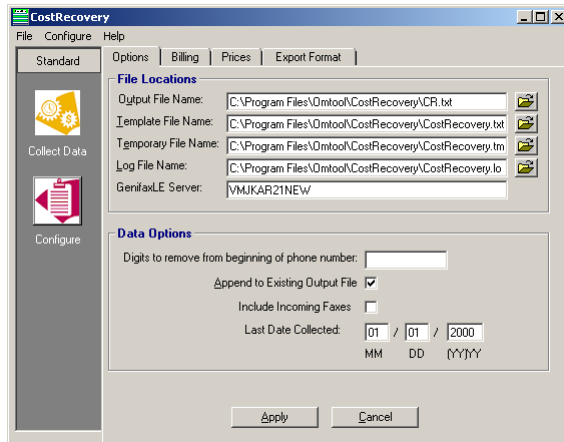
2   Click the **Options** tab.

3   Go to the **Digits to remove from beginning of phone number** field and enter the extra digits that must be removed from the beginning of fax numbers.

4   Click **Apply** to save your changes.

Including billing codes in AccuRoute CostRecovery output

You can have AccuRoute CostRecovery include billing codes in the output files it generates. If you want billing codes included, you need to add the billing code fields to the AccuRoute CostRecovery template file. By default, AccuRoute CostRecovery includes the entire billing code in the output file, but you can provide information about how your billing codes are formatted and which portion of the code you want AccuRoute CostRecovery to collect, if your billing system requires only a portion of the billing codes provided by the senders of messages. For example, if your billing codes are six digits in length, but you only need the last four digits for your billing system, you can configure AccuRoute CostRecovery to pull out the four digits you need.

AccuRoute CostRecovery provides the ability to configure the format for three billing code elements: user ID code, client code, and matter code. On the **Billing** tab in AccuRoute CostRecovery, these elements are represented by **Billing Fields 1**, **2**, and **3**. Typically, **Billing Field 1** corresponds to the user ID code, **Billing Field 2** corresponds to the client code, and **Billing Field 3** corresponds to the matter. Your firm may have other names for these fields.

Configuring the billing code separator

1   Start AccuRoute CostRecovery and click **Configure** in the Standard group in the column on the left

and click the **Billing** tab.
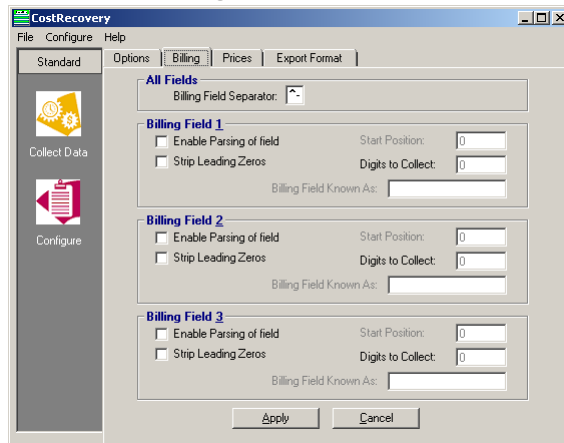
2   Go to the **Billing Field Separator** field under **All Fields** and enter the separator character that
     your billing codes contain, if one is used.

> **Note**   The separator character applies to all billing code types (for example, user ID code, client code, and matter
> code).

3   Click **Apply** to save your changes.

Including the entire billing code in AccuRoute CostRecovery output

To configure the inclusion of the entire billing code in AccuRoute CostRecovery output:

1   Start AccuRoute CostRecovery and click **Configure** in the Standard group in the column on the left
     and click the **Billing** tab.
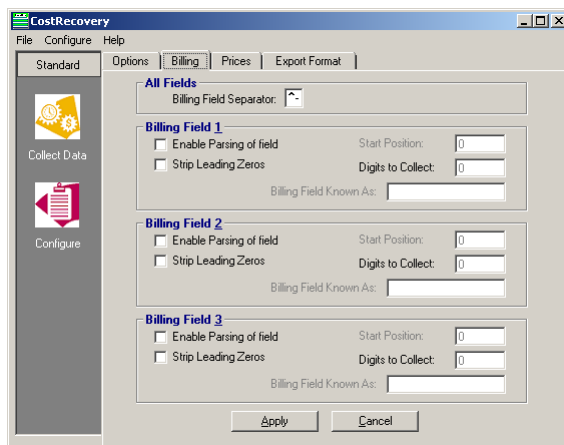
2 Go to the section that corresponds to the billing code type that you want AccuRoute CostRecovery to include (**Billing Field 1** (user), **Billing Field 2** (client), or **Billing Field 3** (matter), and complete the following steps:

a Clear **Enable Parsing of field**.

b Select **Strip Leading Zeros** if you want any leading zeros stripped from the front of this type of billing code. For example, 003456 becomes 3456. Leading zeros are not stripped if the billing code contains alpha characters.

c Click **Apply** to save your changes.

Customizing the billing code

To configure the inclusion of a portion of a billing code in AccuRoute CostRecovery output files:

1 Start AccuRoute CostRecovery and click **Configure** in the Standard group in the column on the left and click the **Billing** tab.
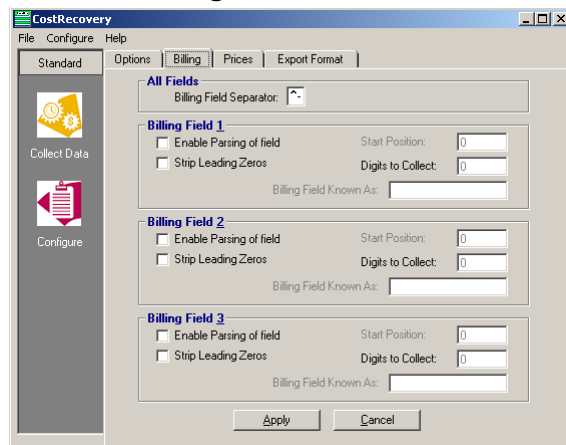
2 Go to the section that corresponds to the billing code type you want AccuRoute CostRecovery to include (**Billing Field 1** (user), **Billing Field 2** (client), or **Billing Field 3** (matter)), and complete the following steps:

a Select **Enable Parsing of field**.

b Select **Strip Leading Zeros** if you want any leading zeros stripped from the front of this type of billing code. For example, 003456 becomes 3456. Leading zeros are not stripped if the billing code contains alpha characters.

c Go to the **Start Position** field and enter the position number of the digit with which you want AccuRoute CostRecovery to begin extracting from the billing code. Count position numbers from left to right.

For example, if your billing codes are all 6 digits (123456) and you want AccuRoute CostRecovery to extract digits 2 through 5, enter 2 as the start position.

Note If the billing codes of this type (user, client, or matter) are of varying lengths and AccuRoute CostRecovery encounters a billing code that contains fewer digits than specified in the **Start Position** and **Digits to Collect** fields, AccuRoute CostRecovery saves the billing code as it is in the output file.

d Go to the **Digits to Collect** field and enter the number of digits you want AccuRoute CostRecovery to extract from the billing code.

Following the example given in the previous step (c), you would enter 4 as the number of digits to collect because there are 4 digits between positions 2 and 5 (digits 2, 3, 4, and 5).

e Enter a name for the billing code in the **Billing Code Known As** field. For example, **Billing Field 1** represents user ID information, so you might enter User ID in this field.

The information you provide in this field is for the benefit of those using AccuRoute CostRecovery, to help them know the purpose of the billing field.

3 Click **Apply** to save your changes.

AccuRoute Server Monitor

This section includes:

Required configuration for AccuRoute Connectors for Filescan and Telco

AccuRoute Server Monitor can run tests on folders associated with AccuRoute Connectors for Filescan and Telco. In order to run tests on these folders, the folders must be configured in UNC format. (UNC uses the format `\\computer\folder`. Drive letter mappings, such as `G:\folder\folder`, are not supported.) If an AccuRoute Server has either of these connectors, complete required configuration in this section.

Note	If you configure AccuRoute Server Monitor to run tests on a folder, verify that the Windows user account associated with the AccuRoute Server Monitor Service has sharing permissions on that folder and security permissions with read access.

This section includes:

Configuring the Filescan connector

To configure Filescan connector folders with UNC paths:

1   Click **Connectors** in the console tree and double-click the **Filescan** connector in the details pane.
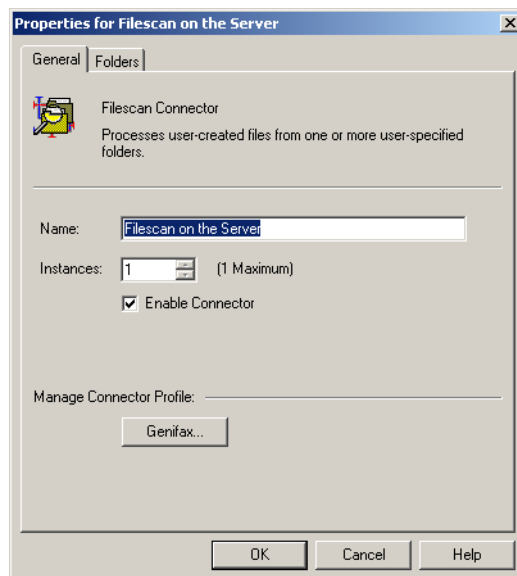
2   Click the **Folders** tab.
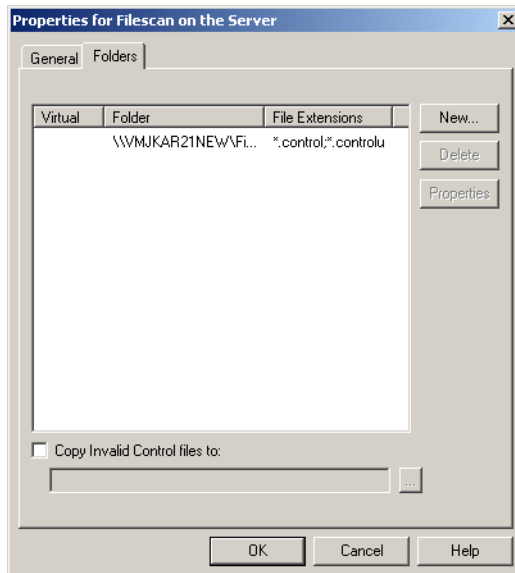
3   Verify that each folder has been configured with a UNC path. (If you need to change a folder configuration, select the folder and click **Properties**. Type the UNC path to the folder in the Folder to scan field and click **OK**.)

4   Click **OK** to save your changes to the connector.

Configuring the Telco connector

Use the following procedure to configure the Telco connector.

To configure the Telco connector folder with a UNC path:

1   Click **Connectors** in the console tree and double-click the **Telco** connector in the details pane.
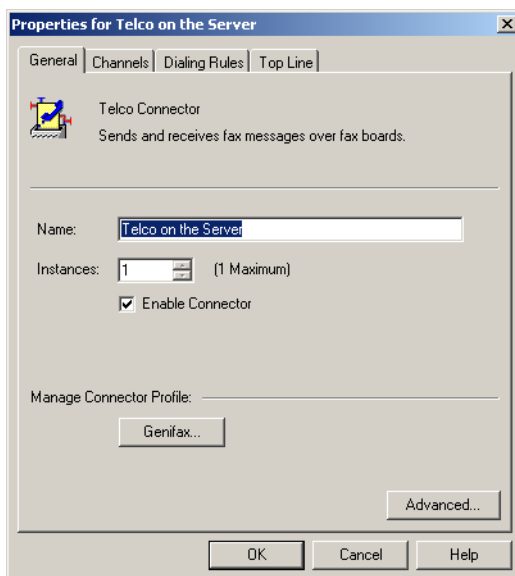
2   Click **Advanced** on the General tab.
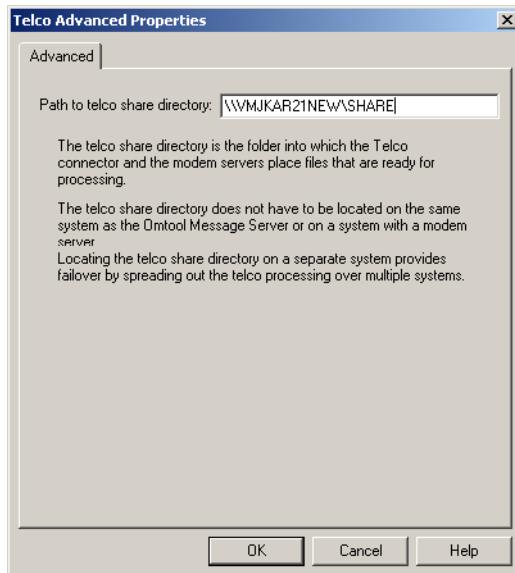
3   Verify that the path to the Telco share directory is in UNC format. Change it if necessary, and then click **OK**.

4   Click **OK** to save your changes to the connector.

AccuRoute FaxCenter

This section includes:

Registering AccuRoute FaxCenter users

In order to run FaxCenter, FaxCenter users must be Registered Users on the server. When you create a Registered User, you can enable the user as a FaxCenter user, assign the user permissions to use FaxCenter features, and configure other properties for this user.

Use the following procedure to create a user account in the Administrator under *Registered Users*. If you have already created a user account for the FaxCenter user, you will modify the user's FaxCenter properties.

To create a new user or modify the FaxCenter properties of a registered user:

1   Start the Administrator.

2   Create a new user or modify the properties of an existing user:

  ▸   **To create a new user**: Right-click **Registered Users** in the console tree and select **New > User**. Type the name and e-mail address of the FaxCenter user in the **Name** and **E-mail** text boxes.

  ▸   **To modify the properties of an existing user**: Click **Registered Users** in the console tree and double-click a registered user in the details pane.

3   Click the **FaxCenter** tab.

4   If you want to enable this user to use FaxCenter, select the **Enable this user as a FaxCenter user** option, and then complete the following steps.

5   If you want to assign a FaxCenter password to this user, type the password in the **Password** and **Confirm** text boxes. If you do not want to assign a password to this user, leave the text boxes empty.

6   When a FaxCenter user selects a fax in FaxCenter, the fax becomes locked so other FaxCenter users cannot access the same fax. (This prevents multiple FaxCenter users from modifying or routing the same fax.) Type the number of minutes you want FaxCenter to wait before it unlocks the fax this user has selected in the **Automatically unlock fax after __ minutes** spin box.

7   You can create an e-mail address filter that limits the users whose e-mail addresses appear in the **FaxCenter Routing** dialog box.

Note   The filter does not prevent the FaxCenter user from routing faxes to other recipients and destinations.

If you want to create a filter, do one of the following:

  ▸   To create an e-mail address filter, use the following string:
      `email=[e-mail address of a user account]`
      For example: `email=user@company.com`

  ▸   To create a site filter, use the following string:
      `site=[name of the Exchange 5.5 site]`
      For example: `site=Finance`

  ▸   To create a name filter, use the following string:
      `name=[alias of a user account]`

For example: `name=jsmith`

Note   The values you use in filters are not case-sensitive.

Tip   You can use an asterisk to indicate a wildcard. For example, if `email=*@company.com`, then FaxCenter
displays the e-mail accounts in the domain you specified as potential routing destinations—in this case,
"company" is the domain you specified.

---

8   In the **Allow User to** section, select the check box beside each option you want to enable for this
user:

▸ **Delete Faxes** - Allow this user to delete faxes from the **Processed Items** list in FaxCenter.

▸ **Move to processed** - Allow this user to move faxes from the **New Items** list into the
Processed Items list.

▸ **Combine Faxes** - Allow this user to combine multiple faxes and route them as one combined
fax.

▸ **View Entire Fax** - Allow this user to view the entire fax. If this option is not enabled, the
FaxCenter user can view only the first page of each fax.

▸ **Enter originator information when routing** - Allow this user to complete the **Routing
Transaction Description** section[1] of the **Route Selected Item** dialog box when routing a fax.
This configuration setting has two additional options that you can enable:

  ▴ **User may leave From empty** - Select this if you want the FaxCenter user to be able to
  leave the **From** field under **Routing Transaction Description** empty, or clear this check
  box if you want to require the user to provide the From information.

  ▴ **User may leave Company empty** - Select this if you want the FaxCenter user to be able
  to leave the **Company** field under **Routing Transaction Description** empty, or clear this
  check box if you want to require the user to provide the Company information.

▸ **Enable or Disable Afterhours Processing** - Allow this user to set **After Hours**[2] for all
FaxCenter users associated with the server.

▸ **Release Registration Pending (HIPAA)** - Allow this user to release faxes from Recipient
Registration Pending to secure destinations.

Important   Since releasing a fax can have legal ramifications in some industries, you should make sure
that the FaxCenter user understands the process of secure delivery.

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1. These fields allow the FaxCenter user to provide the fax recipient with information about the original fax sender. Depending on
how you configure notification messages for faxes that have been routed from FaxCenter to e-mail recipients, these fields (From
and Company) can appear in the notification message from the server.
2. You can create inbound or outbound routing rules that specify how the server should handle messages when it is after hours in
your company. While this feature is versatile and can be configured in a variety of ways, it is most commonly used in conjunction
with FaxCenter. If your company uses FaxCenter, people in your company rely on FaxCenter users to route inbound faxes in a
timely manner. After Hours prevents someone in your company from missing an important fax when FaxCenter users are not in
the office. When it is after hours in your company, you might want to consider routing inbound faxes to network printers so that
people can retrieve them when they arrive. For more information about After Hours, refer to the Administrator help: http://
www.AccuRoute.com/AccuRouteserver/v331/documentation/admin/index.htm

‣ **View all Faxes in FaxCenter** - Allow this user to view all faxes in FaxCenter, even those faxes that have not been routed directly to this user for processing. When this option is enabled, this user can view all faxes on the server that currently reside in the FaxCenter Routing state. Also, this user can see faxes in all queues, including **New Items**, **Processed Items**, **Found Items**, and **Registration Pending**.

9   Select the **Route faxes as** check box if you want the server to send the routing recipient a notification message that includes a name and an e-mail address for this FaxCenter user. If you select the check box, provide the following information:

•**Name** - Type the name you want to appear in the **From** field on all faxes that this user routes from FaxCenter. For example, the name can be the name of the user or another name, such as "John Smith, fax router" or "John Smith".

10   **E-mail** - Type the e-mail address you want to appear in the **From** field on all faxes that this user forwards from FaxCenter. For example, the e-mail address can be associated with the FaxCenter user or another person who you want to receive all replies to the forwarded fax.

11   Click the **Select Columns to View** button if you want to configure the columns that this user will view in FaxCenter. Modify the column properties and save your changes.

12   Click **OK** to save your changes to the properties for this registered user, or click on another tab to modify more properties for this user.

Note   When you modify a user's FaxCenter permissions while that user is currently logged into FaxCenter, the new permissions will not take effect until the next time the user logs in to FaxCenter.

Section 7: Optional Configurations

This section describes the optional configurations available for some AccuRoute clients along with their interactions with each other and the AccuRoute Server.

This section includes:

> [AccuRoute Desktop](#) (7-2)
>
> [AccuRoute Queue](#) (7-49)
>
> [AccuRoute Server Monitor](#) (7-51)
>
> [AccuRoute FaxCenter](#) (7-55)

Note: The following clients have no optional server configurations:

- AccuRoute Web Apps
- Print to AccuRoute
- AccuRoute Acquisition
- AccuRoute Connect
- AccuRoute COM API
- AccuRoute Cost Recovery

AccuRoute Desktop

This section includes:

About AccuRoute Desktop and server clusters

For an environment of the AccuRoute Desktop with an AccuRoute server cluster, additional configurations are necessary before you install AccuRoute Desktop. Resources that are utilized by the AccuRoute server and AccuRoute Desktop clients need to be relocated to a high availability server. This ensures that the active server in the cluster and all clients have uninterrupted access to them.

These resources include:

- View files
- Routing Sheet templates and cover page templates

Copy these resources to a high availability server, and then edit the registry on the AccuRoute server and the configuration file in the AccuRoute Desktop setup so that the AccuRoute server and AccuRoute Desktop clients can begin using the resources on the high availability server immediately.

This section includes:

Copying server and client resources to a high availability server

Before completing this procedure, choose a high availability server. AccuRoute recommends using the same high availability server where the AccuRoute server message database is located. If a different server is used, then it must be located in the same domain as the AccuRoute server or in a different domain that has a bidirectional trust with the AccuRoute server's domain. Access to the folders containing these resources is granted through the sharing and security rights on the folder itself.

To copy server and client resources to the high availability server:

1 Go to `…\UplandAccuRoute\AccuRoute\` directory on the AccuRoute server.

2 Copy and paste `\AccuRouteViews` to the high availability server and wait for the files to be copied.

3 Go to `\AccuRouteViews` on the high availability server and verify that its sharing and security permissions allow clients running AccuRoute Desktop to access it:

   a Right-click **AccuRouteViews** and select **Properties**.

   b Click the **Sharing** tab.

   c Verify that the folder is shared as AccuRouteViews.

   d Click **Permissions** and verify that Everyone has Read access to the folder.

4   Go to `…\UplandAccuRoute\AccuRoute Server\` on the AccuRoute server.

5   Copy and paste `\Languages` to the high availability server and wait for the files to be copied.

6   Go to `\Languages` on the high availability server and set the sharing and security permissions:

    a   Right-click **Languages** and select **Properties**.

    b   Click the **Sharing** tab.

    c   Select **Share this folder**. and verify that the share name is Languages.

    d   Click **Permissions** and verify that Everyone has Read access to the folder.

    e   Click **OK** to close the Permissions dialog box, and click **OK** to save the changes to the folder properties.

Editing the registry on the AccuRoute Server

The location of `\LANGUAGES` is stored in the registry on the AccuRoute server. Instead of moving the location of the Languages folder, you can when needed, move the logical `\TEMPLATES.` It is in the same location as `\LANGUAGES`.

The logical `\TEMPLATES` can point to any UNC path (or other path) as long as it maintains the same sub-folder structure as the original, thereby allowing a single copy of the templates to be maintained for the clustered server.

The default value for the `\TEMPLATES` logical is the same as the `LANGUAGES` folder, located in: `\HKEY_LOCAL_MACHINE\SOFTWARE\AccuRoute\Genifax\Current Version\Logicals`.

All folders except the "Resources" folders in the default install `LANGUAGES` folder can be moved as templates.

> **Note**   Resources must remain on each individual machine.

Editing the AccuRoute Desktop configuration file

AccuRoute Desktop is installed on clients with a configuration file that defines the locations of resources to which the client needs access. This configuration file must be modified to include the new location of view files. Optionally, it can be edited to include the location of the folder containing Routing Sheet templates.

> **Note**   This procedure updates the AccuRoute Desktop setup. This ensures that no configuration is required on the client after installation.

1   To update the AccuRoute Desktop setup with the new location of the folder containing view files:

2   Go to `\UplandAccuRoute\AccuRoute\Clients\AccuRouteDesktop\program files\AccuRoute\AccuRouteDesktop` on the AccuRoute server.

3   Open `AccuRouteclient.xml` in Notepad.

4   Go to the **Aliases** section. (Search on SearchFolders if necessary.)

5   Locate the following alias:

```
<Alias>
<prValue>$/</prValue>
</Alias>
```

6   Replace `$/` with `\\[server]\AccuRouteViews` where [server] is the computer name or IP address of the high availability server.

> **Note** The AccuRouteViews folder is shared, and its share name is AccuRouteViews, so the path to this resource is always `\\[server]\AccuRouteViews`.

7 Save the file and close it.

> **Note** AccuRoute strongly recommends repeating this procedure on the alternate AccuRoute Server.

Working with views

Most features in a view can be modified or removed. Examples include buttons, checkboxes, and labels.

All controls that can be modified or removed are listed in this section. The information is organized based on the view where the control is available:

- [Configuring view controls](#) (7-4)
- [Modifying view files](#) (7-13)

Configuring view controls

Controls for the Default view and the Print To view are presented in the following sections:

- [General controls for the Default view and Print To view](#) (7-5)
- [Additional controls for the Print To view only](#) (7-7)
- [Controls for menus: File menu](#) (7-7)
- [Controls for menus: Edit menu](#) (7-8)
- [Controls for menus: View menu](#) (7-8)
- [Controls for menus: Tools menu](#) (7-8)
- [Controls for menus: Help menu](#) (7-9)
- [Controls for toolbar buttons](#) (7-9)
- [Controls for the Message Options dialog box: General tab](#) (7-10)
- [Controls for the Message Options dialog box: Fax tab](#) (7-11)
- [Controls for the Message Options dialog box: Email tab](#) (7-12)

General controls for the Default view and Print To view

Table 7-1: **General controls for the Default view and Print To view**

Friendly description	Control ID	Type	Function
toggle switch for menu bar and button toolbar	btMenuToggle	toggle switch	Shows or hides the menu and button toolbars in the view.
Recipients section label	lbGroupRecipients	label	Identifies the Recipients section.
Recipients section separator	spGroupRecipients	separator	Defines the Recipients section.
Type list menu label	lbRecientTypes	label	Identifies the Type control.
Type list menu	lcRoutingDestinations	list menu	Displays the routing destination types that are available to the user, and allows the user to select one.
Format list menu label	lbDocumentTypes	label	Identifies the Format control.
Format list menu	lcDocumentTypes	list menu	Allows the user to select the file format of the message.
destination field label	lbRecipientTo	label	Identifies the address field and list menu. Changing the content of this label is not supported. You can only modify whether the control is visible and enabled.
destination field and list menu	cxRecipientAddress	input field/checkbox	Allows the user to select or enter recipients and destinations for the message. Also enables the user to select a recipient or destination from the MRU list that contains the 10 most recently used items.
destination field browse button (displays as an address book icon)	btAddressBook	button	Opens a dialog box that allows the user to select recipients from the address book that is native to the email application installed on the client.
destination field new recipient button (displays as card file entry)	btNewAddress	button	Opens a dialog box that allows the user to add a recipient or destination manually and define properties associated with the recipient or destination.
Add button	btAddRecipient	button	Adds the recipient to the list.
Email copy to self checkbox	cbEmailCopyToMyself	checkbox	Allows the user to request a copy of the message that is delivered to the specified recipients and destinations. When this control is modified, both the control and the label are modified together. Changing the content of this label is not supported. You can only modify whether the control is visible and enabled.
destination properties button	btRecipientProperties	button	Opens the properties of the recipient or destination so that the user can view and modify them.
destination delete button	btRemoveRecipient	button	Deletes the selected recipient or destination from the list in the Recipients section.

Table 7-1: **General controls for the Default view and Print To view**

Friendly description	Control ID	Type	Function
destination list	lcRecipients	list box	Displays the list of recipients and destinations for the message.
Billing checkbox	cbBillingCheck	checkbox	Represents billing controls. Use these control IDs only to change the size or position of billing controls in the user interface. Use the billing configuration in the AccuRoute Connector for DMS to configure the behavior of these controls.
Look up billing codes button (displays as an address book icon)	btBillingLookup	button	
billing 1 field	edBilling1	input field	
billing 2 field	edBilling2	input field	
billing 3 field	edBilling3	input field	
billing 1 field label	lbBilling1	label	Identifies the Billing 1 field.
billing 2 field label	lbBilling2	label	Identifies the Billing 2 field.
billing 3 field label	lbBilling3	label	Identifies the Billing 3 field.
Content section label	lbGroupMessage	label	Identifies Content section.
Content section separator	spGroupMessage	separator	Defines the Content section.
Subject field label	lbSubject	label	Identifies the Subject control.
Subject field	edSubject	input field	Allows the user to enter a subject for the message.
Comments field label	lbComments	label	Identifies the Comments control.
Comments field	edComments	input field	Allows the user to enter comments for recipients.
Attachments list label	lblAttachments	label	Identifies the Attachments section.
Attachments list	lcAttachments	list box	Displays the attachments associated with the message.
Add new attachment button (displays as paper clip icon)	btAddAttachment	button	Opens a dialog box that enables the user to select an attachment and add it to the message.
Remove selected attachment button (displays as a delete icon)	btRemoveAttachment	button	Deletes the selected attachment from the Attachments list.
Print To view separator	spPrintTo	separator	Separates the features above from the buttons below.
Print To view Options button	btPrintOptions	button	Allows the user to select options for the message. This button is visible in the default Print To view.
Print To view OK button	btPrintOK	button	Sends the message and closes the AccuRoute Desktop window.
Print To view Cancel button	btPrintCancel	button	Closes the AccuRoute Desktop window.
Print To view Help button	btPrintHelp	button	Launches user documentation on AccuRoute Desktop.

Additional controls for the Print To view only

Table 7-2: **Additional controls for the Print To view only**

Friendly description	Control ID	Type	Function
Print To view separator	spPrintTo	separator	Separates the features above from the buttons below.
Print To view Options button	btPrintOptions	button	Allows the user to select options for the message. This button is visible in the default Print To view.
Print To view OK button	btPrintOK	button	Sends the message and closes the AccuRoute Desktop window.
Print To view Cancel button	btPrintCancel	button	Closes the AccuRoute Desktop window.
Print To view Help button	btPrintHelp	button	Launches user documentation on AccuRoute Desktop.

Controls for menus: File menu

Table 7-3: **Controls for the File menu**

Friendly description	Control ID	Type	Function
File menu	mnFile	toolbar menu option	Opens the File menu.
File > New	mnNewED	menu option	Opens a new message based on the default settings.
File > Open ED	mnOpenED	menu option	Opens a dialog box that enables the user to select and open an Embedded Directive.
File > Save ED	mnSaveED	menu option	Opens a dialog box that enables the user to save the Embedded Directive, or updates an existing Embedded Directive.
File > Save As New ED	mnSaveAsED	menu option	Opens a dialog box that enables the user to save the Embedded Directive.
File > Send	mnSend	menu option	Sends the message and displays a dialog box to confirm the send operation.
File > View RS	mnViewRS	menu option	Generates a Routing Sheet using the existing message settings and displays the Routing Sheet as a PDF file on the desktop.
File > Print RS	mnPrintRS	menu option	Generates a Routing Sheet using the existing message settings, displays the Routing Sheet as a PDF file on the desktop, and executes the Print command.

Table 7-3: **Controls for the File menu**

Friendly description	Control ID	Type	Function
File > Templates	mnTemplates	menu option	Opens the Templates submenu.
File > Templates > Open	mnOpenTemplate	menu option	Opens a dialog box that enables the user to open a template file.
File > Templates > Save	mnSaveTemplate	menu option	Opens a dialog box that enables the user to save a template file, or updates the existing template file.
File > Templates > Save As New	mnSaveAsTemplate	menu option	Opens a dialog box that enables the user to save a template file.
File > Exit	mnExit	menu option	Prompts the user to save the changes, if applicable, and closes the AccuRoute Desktop window.

Controls for menus: Edit menu

Table 7-4: **Controls for the Edit menu**

Friendly description	Control ID	Type	Function
Edit menu	mnEdit	toolbar menu option	Opens the Edit menu.
Edit > Undo	mnUndo	menu option	Cancels the last command.
Edit > Cut	mnCut	menu option	Cuts the selected text and copies it to the clipboard.
Edit > Copy	mnCopy	menu option	Copies the selected text to the clipboard.
Edit > Paste	mnPaste	menu option	Inserts text from the clipboard.

Controls for menus: View menu

Table 7-5: **Controls for the View menu**

Friendly description	Control ID	Type	Function
View menu	mnView	toolbar menu option	Opens the View menu.

Controls for menus: Tools menu

Table 7-6: **Controls for the Tools menu**

Friendly description	Control ID	Type	Function
Tools menu	mnTools	toolbar menu option	Opens the Tools menu.
Tools > View Configuration	mnViewServerCapabilities	menu option	Opens a window that displays all the configuration data that impacts AccuRoute Desktop.

Table 7-6: **Controls for the Tools menu**

Friendly description	Control ID	Type	Function
Tools > Configuration Folders	mnSearchFolders	menu option	Opens a window that displays the folders containing view files and Routing Sheet template files.
Tools > Configure DMS	mnConfigureDMS	menu option	Opens a submenu containing the DMS applications detected on the client.
Tools > Preferences	mnDefaults	menu option	Opens a window that enables the user to configure options for AccuRoute Desktop.
Tools > Message Options	mnOptions	menu option	Opens a window that enables the user to configure options for the message.

Controls for menus: Help menu

Table 7-7: **Controls for the Help menu**

Friendly description	Control ID	Type	Function
Help menu	mnHelp	toolbar menu option	Opens the Help menu.
Help > About AccuRoute Desktop	mnHelpContents	menu option	Opens a dialog box that displays information on AccuRoute Desktop.
Help > AccuRoute Desktop Help	mnHelpAbout	menu option	Launches user documentation on AccuRoute Desktop.

Controls for toolbar buttons

Table 7-8: **Controls for toolbar buttons**

Friendly description	Control ID	Type	Function
New button	tbNewED	button	Opens a new message based on the default settings.
Open ED button	tbOpenED	button	Opens a dialog box that enables the user to select and open an Embedded Directive.
Save ED button	tbSaveED	button	Opens a dialog box that enables the user to save the Embedded Directive, or updates an existing Embedded Directive.
View RS button	tbViewRS	button	Generates a Routing Sheet using the existing message settings and displays the Routing Sheet as a PDF file on the desktop.

Table 7-8: **Controls for toolbar buttons**

Friendly description	Control ID	Type	Function
Print RS button	tbPrintRS	button	Generates a Routing Sheet using the existing message settings, displays the Routing Sheet as a PDF file on the desktop, and executes the Print command.
Send button	tbSend	button	Sends the message and displays a dialog box to confirm the send operation.
Options button	tbOptions	button	Opens a window that enables the user to configure options for the message.
New button separator	tbspNew	separator	Appears to the right of the New button on the main toolbar.
Open ED and Save ED button separator	tbspOpen	separator	Appears to the right of the Open ED and Save ED buttons on the main toolbar.
View RS and Print RS button separator	tbspRoutingSheet	separator	Appears to the right of the View RS and Print RS buttons on the main toolbar.
Send button separator	tbspSend	separator	Appears to the right of the Send button on the main toolbar.
Options button separator	tbspOptions	separator	Appears to the right of the Options button on the main toolbar.

Controls for the Message Options dialog box: General tab

Table 7-9: **Controls on the General tab (Message Options dialog box)**

Friendly description	Control ID	Type	Function
Embedded Directive section	lbGroupRoutingSheet	label	Identifies the Embedded Directive section.
Embedded Directive section	spGroupRoutingSheet	separator	Defines the Embedded Directive section.
Routing Sheet Style list menu	lbStyles	label	Identifies the Routing Sheet Style list menu.
Routing Sheet Style list menu	cxRoutingSheets	list menu	Enables the user to select the Routing Sheet style.
Retain Routing Sheet in delivered document checkbox	cbRetainRoutingSheet	checkbox	Allows the user to request that the Routing Sheet be included as part of the message.
Single use checkbox	cbSingleUse	checkbox	Allows the user to enable the single use property for the Embedded Directive.
Expires after checkbox	cbExpiresAfter	checkbox	Allows the user to enable expiration for the Embedded Directive.
Expires after date control	dtExpires	date control	Enables the user to select the expiration date for the Embedded Directive.

Table 7-9: **Controls on the General tab (Message Options dialog box)**

Friendly description	Control ID	Type	Function
Confirmation section label	lblGroupConfirmation	label	Identifies the Confirmation section.
Confirmation section separator	spGroupConfirmation	separator	Identifies the Confirmation section.
None radio button	rbNotificationNone	button	Enables the user to select None as the confirmation option for the message,
Failure only radio button	rbNotificationFailure	button	Enables the user to select Failure only as the confirmation option for the message,
Success or Failure radio button	rbNotificationSuccessFailure	button	Enables the user to select Success or Failure as the confirmation option for the message,
Printer checkbox	cbConfirmToPrinter	checkbox	Enables printer confirmation for the message. Makes the Printer field available when enabled.
Printer field	edPrinterNotification	input field	Allows the user to enter a printer destination.
Printer field browse button	btPrinterBrowse	button	Allows the user to browse the network and select a printer for confirmation.
Email checkbox	cbConfirmToEmail	checkbox	Enables email confirmation for the message. Makes the Email field available when enabled.
Email field	edEmailNotification	input field	Allows the user to enter an e-mail destination.
Email browse button	btEmailBrowse	button	Allows the user to browse the address book and select a user for email confirmation.

Controls for the Message Options dialog box: Fax tab

Table 7-10: **Controls on the Fax tab (Message Options dialog box)**

Friendly description	Control ID	Type	Function
Cover sheet section label	lbGroupCoversheet	label	Identifies the Cover sheet section.
Cover sheet section separator	spGroupCoversheet	separator	Defines the Cover sheet section.
Use cover sheet checkbox	cbUseCoverpage	checkbox	Allows the user to request a cover sheet for fax recipients.
Style field	lblCoverpage	label	Identifies the Style field.
Style field and list menu	cxCoverpages	input field/list menu	Allows the user to enter the name of a cover sheet style or to choose a style from the list menu.
Delivery section label	lbGroupDelivery	label	Identifies the Delivery section.
Delivery section separator	spGroupDelivery	separator	Defines the Delivery section.

Table 7-10: **Controls on the Fax tab (Message Options dialog box)**

Friendly description	Control ID	Type	Function
Use access code checkbox	cbUseAccessCode	checkbox	Makes the Use access code field available when enabled.
Use access code field	cxAccessCodes	input field/list menu	Allows the user to enter an access code or to choose an access code from the list menu.
Hold for preview before sending checkbox	cbHoldForPreview	checkbox	Allows the user to request a preview of the message.
Requires management approval checkbox	cbManagerApproval	checkbox	Allows the user to request management approval for the message.
Deliver only to secure fax destinations checkbox	cbSecureDelivery	checkbox	Allows the user to request secure delivery for the message.
Do not deliver before checkbox	cbHoldDelivery	checkbox	Allows the user to request delayed delivery of the message.
Do not deliver before date control	dtHoldDate	date control	Allows the user to choose the date for delivery.
Do not deliver before time control	dtHoldTime	time control	Allows the user to choose the time for delivery.
Delivery Priority list menu label	lbDeliveryPriority	label	Identifies the Delivery Priority option.
Delivery Priority list menu	cxDeliveryPriority	list menu	Allows the user to select a priority level from the list menu.

Controls for the Message Options dialog box: Email tab

Table 7-11: **Controls on the Email tab (Message Options dialog box)**

Friendly description	Control ID	Type	Function
Attachment file name field label	lbAttachmentName	label	Identifies the Attachment file name field.
Attachment file name field	edAttachmentName	input field	Allows the user to enter the file name of the message for email recipients.

Controls for Send To view

Table 7-12: **Controls for the Send To view**

Friendly description	Control ID	Type	Function
User prompt label	lblAction	label	Prompts the user to select a radio button. If you remove this label, the filenames still appear in the view.
Launch AccuRoute Desktop and attach file(s) to a new Embedded Directive radio button	rcCreateNewED	button	Allows the user to send the file as an attachment to a new Embedded Directive.
Deliver file(s) to recipients specified in the selected Embedded Directive radio button	rcSendUsingExisting	button	Allows the user to send the file as an attachment to an existing Embedded Directive. Makes the Embedded Directive list menu available.
Embedded Directive list menu	cEmbeddedDirectives	checkbox	Allows the user to select an existing Embedded Directive.
OK button	btOk	button	Executes the requested action.
Cancel button	btCancel	button	Closes the window.

Modifying view files

Modify view files using the guidelines in the following tables:

- View section (7-14)
- General section (7-15)
- Defaults section (7-17)
- UI section (7-22)
- Transformations section (7-28)
- FaxCoverpages section (7-29)
- FaxAccessCodes section (7-31)
- ConfirmationList section (7-33)
- Recipients section (7-35)
- Attachments section (7-38)
- RoutingSheets section (7-41)

View section

Table 7-13: **Guidelines for modifying the View section**

Element	Parent	Description, attributes, and usage guidelines
View	—	**Description:** Root element.

		Attribute: `inherits`
		
		 Optional attribute that determines whether the view inherits configuration data from another view source.
		
		 Values:
		 • **false** (default) to disable inheritance
		 • UNC path to a view file
		 • view alias (Aliases are defined in AccuRouteClient.XML.)
		 Example of usage:
		
		 The following code sample demonstrates inheritance using a UNC path to the view file:
		
		 `<View inherits="\\<server>\AccuRouteServer\AccuRouteViews\`
		`Organization.view" version="04.00.00">`
		`…`
		`</View>`

		Attribute: `overridable`
		
		 Optional attribute that enables or prevents overrides at all levels.
		
		 Values:
		
		 `true` (default) to allow overrides | `false` to prevent overrides
		 Example of usage:
		
		 `<View overridable="false" version="04.00.00">`
		`…`
		`</View>`
		 If overridable=false, then a derived view cannot override any configuration data inherited from this view.

		Attribute: `version`
		
		 Required attribute that determines the version of the XML schema used in the view file. This value is used internally by the AccuRoute Server. Do not modify the default value 04.00.00.
		
		 Example of usage:
		
		 `<View version="04.00.00">`
		`…`
		`</View>`

General section

Table 7-14: **Guidelines for modifying the General section**

General	**View**	**Description: Section containing general view properties.**

		Attribute: `overridable`
		
		Optional attribute that enables or prevents overrides within this section.
		
		Values:
		
		`true` **(default) to allow overrides |** `false` **to prevent overrides**
		
		Example of usage:
		
		`<View overridable="true" version="04.00.00">`
		`    <General overridable="true">`
		`    …`
		`    </General>`
		`    …`
		`</View>`
		
		Note: For an override to be valid, the View section must allow overrides.

		The General element supports the following properties:
		
		• **prFormDll - DLL file (required) that AccuRoute Desktop loads. Do not modify the default value omARClient4FrmExU.DLL. The complete element must be:**
		
		`<General overridable="true">`
		`        <prFormDll>omARClient4FrmExU.DLL</prFormDll>`
		`        …`
		`    </General>`

Table 7-14: **Guidelines for modifying the General section**

General
continued
	• **prFormDll** - DLL file (required) that AccuRoute Desktop loads. Do not modify the default value omARClient4FrmExU.DLL. The complete element must be:
	
	`<General overridable="true">`
	    `<prFormDll>omARClient4FrmExU.DLL</prFormDll>`
	    …
	`</General>`
	
	• **prName** - Name (required) that the AccuRoute Server uses to identify the view type. Use one of the following values:
	    ‣ **AccuRouteClient** for standard and Print To views
	    ‣ **DirectSend** for the Send To view
	
	The following code sample shows a standard view that uses the required value AccuRouteClient:
	
	`<General overridable="true">`
	    …
	    `<prName>AccuRouteClient</prName>`
	    …
	`</General>`
	
	• **prShowDocInTitle** - Boolean value that determines whether the title of the message, Embedded Directive, or template appears in the window title for AccuRoute Desktop. Use one of the following values:
	    ‣ **0** to omit the title
	    ‣ **1** (default) to include the title
	
	For example:
	
	`<General overridable="true">`…
	    …
	    `<prShowDocInTitle>0</prShowDocInTitle>`…
	    …
	`</General>`
	
	• **prShowScanLocation** - Boolean value that determines whether the prompt **Submitted document(s) here** appears in the attachments list. Use one of the following values:
	    ‣ **0** to hide the prompt
	    ‣ **1** (default) to show the prompt
	
	For example:
	
	`<General overridable="true">`
	    …
	    `<prShowScanLocation>0</prShowScanLocation>`
	    …
	`</General>`

Defaults section

Table 7-15: **Guidelines for modifying the Defaults section**

Element	Parent	Description, attributes, and usage guidelines
Defaults	View	Section containing default view properties.

		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		
		• **true** (default) to allow overrides
		• **false** to prevent overrides
		For example:
		
		`<View overridable="true" version="04.00.00">`
		`    …`
		`    <Defaults overridable="true">`
		`    …`
		`    </Defaults>`
		`    …`
		`</View>`
		
		For an override to be valid, the View section must allow overrides.

EmbeddedDirective	Defaults	Section containing defaults for Embedded Directives.

		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		
		• **true** (default) to allow overrides
		• **false** to prevent overrides
		For example:
		
		`<Defaults overridable="true">`
		`    <EmbeddedDirective overridable="true">`
		`    …`
		`    </EmbeddedDirective>`
		`    …`
		`</Defaults>`
		
		For an override to be valid, the View section and Defaults section must allow overrides.

Table 7-15: **Guidelines for modifying the Defaults section**

Element	Parent	Description, attributes, and usage guidelines
		The EmbeddedDirective section supports the following properties:
		• **prUseOnlyOnce** - Use one of the following values:
		▸ **0** (default) for multiple use
		▸ **1** for single use
		For example:

		`<EmbeddedDirective overridable="true">`
		`    ...`
		`    <prUseOnlyOnce>1</prUseOnlyOnce>`
		`    ...`
		`</EmbeddedDirective>`

		• **prRemoveEmbeddedDirective** - Use one of the following values:
		▸ **0** (default) to retain the Routing Sheet in the message
		▸ **1** to remove the Routing Sheet from the message prior to delivery
		For example:

		`<EmbeddedDirective overridable="true">`
		`    ...`
		`    <prRemoveEmbeddedDirective>0`
		`    </prRemoveEmbeddedDirective>`
		`    ...`
		`</EmbeddedDirective>`

		• **prExpiresInterval** - Number of days that an Embedded Directive remains valid for use. For example:

		`<EmbeddedDirective overridable="true">`
		`    ...`
		`    <prExpiresInterval>365</prExpiresInterval>`
		`    ...`
		`</EmbeddedDirective>`

		• **prAccuRouteCCMySelf** - Use one of the following values:
		▸ **0** (default) to omit the sender as a CC recipient
		▸ **1** to include the sender as a CC recipient
		For example:

		`<EmbeddedDirective overridable="true">`
		`    ...`
		`    <prAccuRouteCCMySelf>1</prAccuRouteCCMySelf>`
		`    ...`
		`</EmbeddedDirective>`

Table 7-15: **Guidelines for modifying the Defaults section**

Element	Parent	Description, attributes, and usage guidelines
Recipient	Defaults	Section containing defaults for various recipient types, including fax, email, and printer.

		The required attribute **type** determines the recipient type for the section. (To define defaults for multiple recipient types, include a Recipient section for each recipient type.) Use one of the following values:
		
		• **fax** to define defaults for fax recipient
		• **email** to define defaults for email recipients
		• **printer** to define defaults for printer destinations
		For example:
		
		`<Defaults overridable="true">`
		`    …`
		`    <Recipient type="fax">`
		`    …`
		`    </Recipient>`
		`    …`
		`</Defaults>`
		
		Setting defaults for the DMS type is not supported at this time.

		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		
		• **true** (default) to allow overrides
		• **false** to prevent overrides
		For example:
		
		`<Recipient type="fax" overridable="true">`
		`…`
		`</Recipient>`
		
		For an override to be valid, the View section and Defaults section must allow overrides.

Table 7-15: **Guidelines for modifying the Defaults section**

Element	Parent	Description, attributes, and usage guidelines

		The type **email** supports the following properties:
		
		• **prDeliveredDocumentName** - Filename of the message attachment. (If a message is delivered to an email recipient, the message is delivered as a file attachment to an email message.) Do not include a file extension. For example:
		
		`<Recipient type="email" overridable="true">`
		` ...`
		`    <prDeliveredDocumentName>Message`
		`    </prDeliveredDocumentName>`
		`    ...`
		`</Recipient>`

		The type **fax** supports the following properties:
		
		• **prApprovalRequested** - Use one of the following values:
		  ▸ **0** to disable approval by default
		  ▸ **1** to enable approval by default
		
		If true, then the AccuRoute Desktop option **Requires management approval** is enabled by default for messages with fax recipients. For example:
		
		`<Recipient type="fax" overridable="true">|`
		`    ...`
		`    <prApprovalRequested>1</prApprovalRequested>`
		`    ...`
		`</Recipient>`
		
		• **prRegistrationRequested** - Use one of the following values:
		  ▸ **0** to disable secure delivery by default
		  ▸ **1** to enable secure delivery by default
		
		If true, then the AccuRoute Desktop option **Deliver only to secure fax destinations** is enabled by default for messages with fax recipients. For example:
		
		`<Recipient type="fax" overridable="true">`
		`    ...`
		`    <prRegistrationRequested>1</prRegistrationRequested>`
		`    ...`
		`</Recipient>`
		
		• **prPreviewRequired** - Use one of the following values:
		  ▸ **0** to disable preview by default
		  ▸ **1** to enable preview by default
		
		If true, the AccuRoute Desktop option **Hold for preview before sending** is enabled by default for messages with fax recipients. For example:
		
		`<Recipient type="fax" overridable="true">`
		`    ...`
		`    <prPreviewRequired>1</prPreviewRequired>`
		`    ...`
		`</Recipient>`

Table 7-15: **Guidelines for modifying the Defaults section**

Element	Parent	Description, attributes, and usage guidelines

Recipient continued		• **prPriority** - Message priority. Use one of the following values:
		
		▸ **0** for high priority
		
		▸ **5** for normal priority (default)
		
		▸ **10** for low priority.
		
		If this property is included, the AccuRoute Desktop option **Delivery Priority** displays the default value set by the property. For example:
		
		`<Recipient type="fax" overridable="true">`
		`    …`
		`    <prPriority>10</prPriority>`
		`    …`
		`</Recipient>`
		
		• **prDateSendAfter** - Send after date for messages with a fax recipient. Use date format, such as MM/DD/YYYY. For example:
		
		`<Recipient type="fax" overridable="true">`
		`    …`
		`    <prDateSendAfter>06/30/2006</prDateSendAfter>`
		`    …`
		`</Recipient>`

		The type **printer** supports the following properties:
		
		• **prPrintNumberOfCopies** - Number of copies for messages with a printer destination. Default is 1. For example:
		
		`<Recipient type="printer" overridable="true">`
		`    …`
		`    <prPrintNumberOfCopies>3</prPrintNumberOfCopies>`
		`    …`
		`</Recipient>`

UI section

Table 7-16: **Guidelines for modifying the UI section**

Element	Parent	Description, attributes, and usage guidelines
UI	View	Section containing view properties pertaining to the user interface, such as the configuration of controls, menus, and toolbars

		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		
		• **true** (default) to allow overrides
		• **false** to prevent overrides
		For example:
		
		`<View overridable="true" version="04.00.00">`
		`        …`
		`        <UI overridable="true">`
		`        …`
		`        </UI>`
		`        …`
		`</View>`
		
		For an override to be valid, the View section must allow overrides.

Form Menu Toolbar Options	UI	The UI element supports the following sections: • **\<View>\<UI>\<Form>** - Pertains to controls in the user interface. • **\<View>\<UI>\<Menu>** - Pertains to a menu item in the user interface. • **\<View>\<UI>\<Toolbar>** - Pertains to the toolbar in the user interface. • **\<View>\<UI>\<Options>** - Pertains to the Message Options dialog box.

	Form
	Menu
	Toolbar
	Options
		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		
		• **true** (default) to allow overrides
		• **false** to prevent overrides
		The following code sample enables overrides to the form:
		
		`<Form overridable="true">`
		`…`
		`</Form>`
		
		For an override to be valid, the View section and UI section must allow overrides.

	Menu
	Toolbar
		The optional attribute **visible** determines whether the control is visible. Use one of the following values:
		
		• **true** (default) to display the control
		• **false** to hide the control.
		The following code sample hides the toolbar:
		
		`<Toolbar visible="false" overridable="false">`
		`…`
		`</Toolbar>`

Table 7-16: **Guidelines for modifying the UI section**

Element	Parent	Description, attributes, and usage guidelines
	Menu	The controls for menu items and toolbars support the following properties:
	Toolbar	• **prControlID** - String value that identifies the control.

The following code sample identifies the control mnTemplates:

```
<Menu overridable="false">
    <prControlID>mnTemplates</prControlID>
    …
</Menu>
```
Control IDs are listed in <u>Controls for menus: File menu</u> (7-7) and <u>Controls for toolbar buttons</u> (7-9).

• **prVisible** - Boolean value determines whether the control is visible. Use one of the following values:

‣ **0** to hide the control

‣ **1** (default) to show the control

The following code sample hides the control tbViewRS:

```
<Toolbar overridable="false">
    <prControlID>tbViewRS</prControlID>
    <prVisible>0</prVisible>
</Toolbar>
```

• **prEnabled** - Boolean value determines whether the control is available. (If unavailable, the control is grayed out.) Use one of the following values:

‣ **0** to disable the control

‣ **1** (default) to enable the control

The following code sample disables the control mnTemplates:

```
<Menu overridable="false">
    <prControlID>mnTemplates</prControlID>
    <prEnabled>0</prEnabled>
</Menu>
```

• **prLabel** - Name that accompanies the control.

The following code sample identifies the label for the control tbViewRS:
```
<Toolbar overridable="false">
    <prControlID>tbViewRS</prControlID>
    <prLabel>View RS</prLabel>
</Toolbar>
```

Table 7-16: **Guidelines for modifying the UI section**

Element	Parent	Description, attributes, and usage guidelines
Control General Fax Email	Form Options	The Form and Options elements support the following sections: • **\<View>\<UI>\<Form>\<Control>** - Pertains to a control in the user interface. • **\<View>\<UI>\<Options>\<General>** - Pertains to controls on the General tab in the Message Options dialog box. • **\<View>\<UI>\<Options>\<Fax>** - Pertains to controls on the Fax tab in the Message Options dialog box. • **\<View>\<UI>\<Options>\<Email>** - Pertains to controls on the Email tab in the Message Options dialog box.

	Control
	General
	Fax
	Email
		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		
		• **true** (default) to allow overrides
		• **false** to prevent overrides
		The following code sample enables overrides to the control btMenuToggle:
		
		`<Control overridable="true">`
		`    <prControlID>btMenuToggle</prControlID>`
		`    <prVisible>0</prVisible>`
		`</Control>`
		
		For an override to be valid, the View section and UI section, as well as the respective parent element of this attribute (Form section or Options section), must allow overrides.

	General
	Fax
	Email
		The optional attribute **visible** determines whether the control is visible. Use one of the following values:
		
		• **true** (default) to display the control
		• **false** to hide the control
		The following code sample hides the Fax tab in the Message Options dialog box:
		
		`<Fax visible="false" overridable="false">`
		`</Fax>`

Table 7-16: **Guidelines for modifying the UI section**

Element	Parent	Description, attributes, and usage guidelines
	Control General Fax Email	The controls for forms and the Message Options dialog box support the following properties: • **prControlID** - String value that identifies the control. The following code sample identifies the control cxDeliveryPriority:

```
<Fax overridable="true">
    <prControlID>cxDeliveryPriority</prControlID>
    <prVisible>0</prVisible>
</Fax>
```

The control IDs for this section are listed in <u>General controls for the Default view and Print To view</u> (7-5), <u>Additional controls for the Print To view only</u> (7-7), and <u>Controls for the Message Options dialog box: General tab</u> (7-10).

• **prVisible** - Boolean value determines whether the control is visible. Use one of the following values:

  ▸ **0** to hide the control

  ▸ **1** (default) to show the control

The following code sample hides the control btMenuToggle on the form:

```
<Control overridable="true">
    <prControlID>btMenuToggle</prControlID>
    <prVisible>0</prVisible>
</Control>
```

• **prEnabled** - Boolean value determines whether the control is available. (If unavailable, the control is grayed out.) Use one of the following values:

  ▸ **0** to disable the control

  ▸ **1** (default) to enable the control

The following code sample disables the control cxDeliveryPriority:

```
<Fax overridable="true">
    <prControlID>cxDeliveryPriority</prControlID>
    <prEnabled>0</prEnabled>
</Fax>
```

• **prTooltip** - Tool tip that becomes visible when the pointer hovers over the control.

The following code sample specifies the tool tip for the control btMenuToggle:

```
<Control overridable="true">
    <prControlID>btMenuToggle</prControlID>
    <prVisible>1</prVisible>
    <prTooltip>Show or hide menu and toolbar</prTooltip>
</Control>
```

• **prLabel** - Name that accompanies the control.

For example:

```
<Control overridable="true">
    <prControlID>lbDocumentTypes</prControlID>
    <prLabel>Recipients</prLabel>
</Control>
```

Table 7-16: **Guidelines for modifying the UI section**

Element	Parent	Description, attributes, and usage guidelines
		The controls for forms and the Message Options dialog box support the following dimension properties: • **prTop** - Top position of the control. Specify a relative or absolute workspace coordinate. For absolute workspace coordinates, the value 0 indicates the top of the form. The following code sample demonstrates a change in the vertical position of the control cbEmailCopyToMyself: ``` <Control overridable="true"> <prControlID>cbEmailCopyToMyself</prControlID> <prTop>+20</prTop> <prBottom>+20</prBottom> </Control> ``` Notice a couple key points in this sample. First, since the 0 coordinate represents the top of the form, a positive value is required to move the control toward the bottom of the form. Second, notice that the top and bottom positions are modified together. If only the top position is moved toward the bottom of the form, the overall height of the control is decreased. If only the bottom position is moved toward the bottom of the form, the overall height of the control is increased, and in this case, the control would appear to be stretched when the view is loaded. • **prBottom** - Bottom position of the control. Specify a relative or absolute workspace coordinate. See prTop (above) for a code sample. • **prLeft** - Left position of the control. Specify a relative or absolute workspace coordinate. For absolute coordinates, the value 0 indicates the left side of the form. See prRight (below) for a code sample. • **prRight** - Right position of the control. Specify a relative or absolute workspace coordinate. The following code sample demonstrates a change in the size of the input field edSubject: ``` <Control overridable="true"> <prControlID>edSubject</prControlID> <prRight>-20</prRight> </Control> ``` First, the intent is to move the right side of the control, so the property prLeft is not set. Second, because the absolute value of coordinates increases from left to right, a negative value for the property prRight moves the position from right to left. Third, the property prWidth would achieve the same effect. • **prWidth** - Width of the control. Specify a relative or absolute workspace coordinate. A relative positive value always decreases the width of the control, and a relative negative value always increases the width of the control. An absolute value determines the width of the control relative to its left position. See prHeight (below) for a code sample. • **prHeight** - Height of the control. Specify a relative or absolute workspace coordinate. The following code sample shows an absolute height declaration on the control lcRoutingDestinations: ``` <Control overridable="true"> <prControlID>lcRoutingDestinations</prControlID> <prHeight>60</prHeight> </Control> ``` Guidelines for modifying dimensional properties are continued on the next page.

Table 7-16: **Guidelines for modifying the UI section**

Element	Parent	Description, attributes, and usage guidelines
		Use the following guidelines when modifying a dimensional property: • Each control is independent of others in the view. When modifying the size or position of a control, be careful that you do not hide a control behind another one. • Numerical values for dimensional properties use can be relative or absolute. For example, if the value is +20, the view increases the default dimension by 20 workspace coordinates. Similarly, if the value is -20, the view decreases the default dimension by 20 workspace coordinates. Or if the value is 435, the view sets the dimension on the control at the x- or y-coordinate 435. If making an absolute declaration on a dimensional property, consider the following: • For Standard and Print To views, 0 represents the top of the form, 445 represents the bottom, 0 represents the left side; and 646 represents the right side. • For Send To views, 0 represents the top of the form, 215 represents the bottom, 0 represents the left side, and 545 represents the right side. • For message options dialog boxes, 0 represents the top of the form, 265 represents the bottom, 0 represents the left side, and 435 represents the right side.

Transformations section

Table 7-17: **Guidelines for modifying the Transformations section**

Element	Parent	Description, attributes, and usage guidelines
Transformations	View	Section containing definitions of data transformations. The view configuration can effect data transformations on message properties, recipient properties, Embedded Directive properties, and template variables.

		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		
		• **true** (default) to allow overrides
		• **false** to prevent overrides
		For example:
		
		`<View overridable="true" version="04.00.00">`
		   …
		   `<Transformations overridable="true">`
		   …
		   `</Transformations>`
		   …
		`</View>`
		
		For an override to be valid, the View section must allow overrides.

Transform	Transformations	Section containing the definition of a data transformation.

		The element **prValue** supports the following attributes:
		
		• **transform** - Value being transformed. Use a message property, recipient property, Embedded Directive property, or template variable.
		• **replace** - This optional attribute identifies any static characters in the string format that need to be transformed. Use the attribute replace in conjunction with the attribute with.
		• **with** - This optional attribute accompanies the attribute replace. It determines the replacement value.
		The following code sample demonstrates the transformation of the access code into billing data:
		
		`<Transform transform="prAccessCode" replace="^" with="">`
		   `<prValue>%LEGAL_BILL_01%%LEGAL_BILL_02%`
		   `%LEGAL_BILL_03%</prValue>`
		 `</Transform>`
		
		This code sample transforms prAccessCode into a string value that contains merged data from the billing fields %LEGAL_BILL01%, %LEGAL_BILL02%, and %LEGAL_BILL03%. It also removes carets (^) from the string format so that the resulting string includes only the characters from the billing fields.
		
		Tip: Previous AccuRoute Client versions supported the configuration of the string value prAccessCode to include billing data. The code sample above can be copied into a view file, and further modified if necessary, to achieve the same effect with AccuRoute Desktop.

		The Transform section supports the following properties: • **prValue** - Substitution value that results from the data transformation. Use any combination of message properties such as prOriginator, recipient properties such as prDestination, Embedded Directive properties such as prSingleUse, or template variables such as %SENDER_CUSTOM1%. Text, formatting characters, and spaces are supported. See the code sample above.

FaxCoverpages section

Table 7-18: **Guidelines for modifying the FaxCoverpages section**

Element	Parent	Description, attributes, and usage guidelines
FaxCoverpages	View	Section pertaining to fax cover pages.

		The optional attribute **enabled** determines whether the information in this section is enabled for the current view. Use one of the following values:
		
		• **true** (default) to enable the section
		• **false** to disable the section.
		The following code sample shows the section enabled, which means the view reflects the configuration for fax cover pages:
		
		`<View overridable="true" version="04.00.00">`
		`    …`
		`        <FaxCoverpages enabled="true" overridable="true">`
		`        …`
		`        </FaxCoverpages>`
		`        …`
		`</View>`

		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		
		• **true** (default) to allow overrides
		• **false** to prevent overrides
		For example:
		
		`<View overridable="true" version="04.00.00">`
		`    …`
		`        <FaxCoverpages enabled="true" overridable="true">`
		`        …`
		`        </FaxCoverpages>`
		`        …`
		`</View>`
		
		For an override to be valid, the View section must allow overrides.

Table 7-18: **Guidelines for modifying the FaxCoverpages section**

Element	Parent	Description, attributes, and usage guidelines
FaxCoverpage	FaxCoverpages	Section defining the fax cover page options that should appear in the view.
		The attribute **default**, if true, denotes the cover page that should be selected by default in the view. Use one of the following values: • **true** to denote the default cover page • **false** (default) The following code sample denotes that the cover page is the default selection: ``` <FaxCoverpages enabled="true"> <FaxCoverpage default="true"> … </FaxCoverpage> … </FaxCoverpages> ``` The attribute default can be enabled for one cover page only.
		The FaxCoverpage section supports the following properties: • **prTemplateFilename** - The filename of the cover page template. Do not include the file extension. The following code sample shows two cover pages that should appear in the cover page drop-down menu. The second cover page is denoted as the default: ``` <FaxCoverpage> <prTemplateFilename>Sales </prTemplateFilename> </FaxCoverpage> <FaxCoverpage default="true"> <prTemplateFilename>InvestorRelations </prTemplateFilename> </FaxCoverpage> ```

FaxAccessCodes section

Table 7-19: **Guidelines for modifying the FaxAccessCodes section**

Element	Parent	Description, attributes, and usage guidelines
FaxAccessCodes	View	Section pertaining to fax access codes.

		The optional attribute **enabled** determines whether the information in this section is enabled for the current view. Use one of the following values:
		
		• **true** (default) to enable the section
		• **false** to disable the section
		The following code sample shows the section enabled, which means the view reflects the configuration for fax access codes:
		
		`<View overridable="true" version="04.00.00">`
		`       …`
		`       <FaxAccessCodes enabled="true">`
		`       …`
		`       </FaxAccessCodes>`
		`       …`
		`</View>`

		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		
		• **true** (default) to allow overrides
		• **false** to prevent overrides
		For example:
		
		`<View overridable="true" version="04.00.00">`
		`       …`
		`       <FaxAccessCodes enabled="true" overridable="false">`
		`       …`
		`       </FaxAccessCodes>`
		`       …`
		`</View>`
		
		For an override to be valid, the View section must allow overrides.

Table 7-19: **Guidelines for modifying the FaxAccessCodes section**

Element	Parent	Description, attributes, and usage guidelines
FaxAccessCode	FaxAccessCodes	Section defining the fax access code options that should appear in the view.
		The attribute **default**, if true, denotes the access code that should be selected by default in the view. Use one of the following values: • **true** to denote the default access code • **false** (default) The following code sample denotes that the access code is the default selection: ``` <FaxAccessCodes enabled="true"> <FaxAccessCode default="true"> <prAccessCode>93382</prAccessCode> </FaxAccessCode> … </FaxAccessCodes> ``` The attribute default can be enabled for one cover page only.
		The FaxAccessCode section supports the following properties: • **prAccessCode** - Access code. The following code sample shows three access codes that should appear in the access code drop-down menu. The third access code is denoted as the default: ``` <FaxAccessCode> <prAccessCode>7759</prAccessCode> </FaxAccessCode> <FaxAccessCode> <prAccessCode>93382</prAccessCode> </FaxAccessCode> <FaxAccessCode default="true"> <prAccessCode>1883442</prAccessCode> </FaxAccessCode> ```

ConfirmationList section

Table 7-20: **Guidelines for modifying the ConfirmationList section**

Element	Parent	Description, attributes, and usage guidelines
ConfirmationList	View	Section that defines the list of default destinations for delivery confirmation.

		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		
		• **true** (default) to allow overrides
		• **false** to prevent overrides
		For example:
		
		`<View overridable="true" version="04.00.00">`
		`    …`
		`    <ConfirmationList overridable="false"`
		`     notifyon="successandfailure">`
		`    </ConfirmationList>`
		`    …`
		`</View>`
		
		For an override to be valid, the View section must allow overrides.

		The attribute **notifyon** determines the conditions in which a delivery confirmation message is sent. Use one of the following values:
		
		• **failure** to send a delivery confirmation only when message delivery fails
		• **successandfailure** to send a delivery confirmation when message delivery succeeds or fails. If this attribute is not present, no delivery confirmation message is sent.
		
		The following code sample shows a confirmation destination that is configured to receive delivery confirmation whenever message delivery succeeds or fails:
		
		`<View overridable="true" version="04.00.00">`
		`    …`
		`    <ConfirmationList overridable="false"`
		`     notifyon="successandfailure">`
		`    </ConfirmationList>`
		`    …`
		`</View>`

Table 7-20: **Guidelines for modifying the ConfirmationList section**

Element	Parent	Description, attributes, and usage guidelines
Confirmation	ConfirmationList	Section defining a destination for delivery confirmation.

		The attribute **type** defines the destination type. Use one of the following values:
		
		• **Email** to specify an email address
		• **Printer** to indicate the UNC path or IP address of a network printer
		The following code sample shows a printer confirmation destination:
		
		`<ConfirmationList overridable="false"`
		`  notifyon="successandfailure">`
		`    <Confirmation type="Printer">`
		`        <prDestination>IP:172.16.10.40</prDestination>`
		`    </Confirmation>`
		
		`    …`
		`</ConfirmationList>`

		The Confirmation section supports the following properties:
		
		• **prDestination** - Defines the location where the delivery confirmation message is sent, and must correspond appropriately to the destination type defined by the attribute type.
		
		For email destinations, use an actual email address (name@domain.com) or %SENDER_EMAIL% for the sender's email address. (%SENDER_EMAIL% is valid only in AccuRoute Desktop v2.1.01 and later.)
		
		For printer destinations, use a UNC path to the network printer (\\server\printer), or the IP address of the network printer (IP:nn.nn.nn.nn).
		
		The following code sample results in the delivery confirmation message being sent to the sender's email address:
		
		`<Confirmation type="Email">`
		`        <prDestination>%SENDER_EMAIL%</prDestination>`
		`</Confirmation>`

Recipients section

Table 7-21: **Guidelines for modifying the Recipients section**

Element	Parent	Description, attributes, and usage guidelines
Recipients	View	Section defining the default recipients associated with the view.
		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		• **true** (default) to allow overrides • **false** to prevent overrides For example:
		``` <View overridable="true" version="04.00.00"> … <Recipients overridable="false"> … </Recipients> … </View> ```
		For an override to be valid, the View section must allow overrides.

Table 7-21: **Guidelines for modifying the Recipients section**

Element	Parent	Description, attributes, and usage guidelines
Recipient	Recipients	Section defining a default recipient associated with the view.

		The optional attribute **visible** determines whether the additional recipients are visible on the form. Use one of the following values:
		
		• **true** (default) to display additional recipients
		• **false** to hide additional recipients
		The following code sample hides the additional email recipient specified in the view configuration:
		
		`<Recipients overridable="false">`
		    `<Recipient visible="false" type="Email">`
		    …
		    `</Recipient>`
		…
		`</Recipients>`

		The required attribute **type** defines the destination type. Use one of the following values:
		
		• **Email** to specify an email address
		• **Printer** to indicate the UNC path or IP address of a network printer
		• **Fax** to specify a fax destination
		The following code sample specifies that the recipient destination type is email:
		
		`<Recipients overridable="false">`
		    `<Recipient visible="false" type="Email">`
		    …
		    `</Recipient>`
		…
		`</Recipients>`

Table 7-21: **Guidelines for modifying the Recipients section**

Element	Parent	Description, attributes, and usage guidelines

		The Recipient section supports the following properties:
		
		• **prName** - Friendly name of the recipient or destination.
		
		    The following code sample shows John Smith as the name of the delivery confirmation recipient:
		
		`<Recipient visible="false" type="Email">`
		`    <prName>John Smith</prName>`
		`    …`
		`</Recipient>`
		
		• **prDestination** - Destination address.
		
		    The following code sample shows jsmith@AccuRoute.com as the destination for the delivery confirmation message:
		
		`<Recipient visible="false" type="Email">`
		`    …`
		`    <prDestination>jsmith@AccuRoute.com</prDestination>`
		`    …`
		`</Recipient>`
		
		• **prFinalFormCode** - File format of the delivery confirmation message. Use one of the following values:
		
		    ▸ **G4.TIF** for a G4 TIFF file
		    ▸ **PDF** for a PDF file
		    ▸ **OCR.PDF** for a PDF file that contains OCR-rendered text
		    ▸ **OCR.DOC** for a Word document that contains OCR-rendered text
		    ▸ **OCR.RTF** for a rich text format document with OCR-rendered text
		    ▸ **OCR.TXT** for a simple text document that contains OCR-rendered text
		
		    The following code sample shows OCR.TEXT as the file format for the delivery confirmation message:
		
		`<Recipient visible="false" type="Email">`
		`    …`
		`    <prFinalFormCode>OCR.TXT</prFinalFormCode>`
		`    …`
		` <\Recipient>`

Attachments section

Table 7-22: **Guidelines for modifying the Attachments section**

Element	Parent	Description, attributes, and usage guidelines
Attachments	View	Section defining default attachments to messages created with this view.
		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		• **true** (default) to allow overrides • **false** to prevent overrides For example:

		`<View overridable="true" version="04.00.00">`
		`        …`
		`        <<Attachments overridable="true">`
		`        …`
		`        </Attachments>`
		`        …`
		`</View>`

		For an override to be valid, the View section must allow overrides.

Table 7-22: **Guidelines for modifying the Attachments section**

Element	Parent	Description, attributes, and usage guidelines

Attachment	Attachments	The optional attribute **visible** determines whether the additional attachments are visible on the form. Use one of the following values:
		
		• **true** (default) to display additional attachments
		• **false** to hide them
		The following code sample hides the additional attachments specified in the view configuration:
		
		`<Attachments overridable="true">`
		`    <Attachment visible="false" attachmenttype="file">`
		`    …`
		`    </Attachment>`
		`    …`
		`</Attachments>`

		The required attribute **attachmenttype** defines the attachment type. Use one of the following values:
		
		• **file** (default) to specify the UNC path to a file that should be added to the form when the view loads
		• **web** to specify the URL of a web page that should be added to the form when the view loads
		• **urllink** to specify the URL of a web page that should be added to the message when the server prepares it for delivery
		• **unclink** to specify the UNC path to a file that should be added to the message when the server prepares it for delivery
		The following code sample show the attachment type urllink:
		
		`<Attachments overridable="true">`
		`    <Attachment visible="false" attachmenttype="urllink">`
		`    …`
		`    </Attachment>`
		`    …`
		`</Attachments>`

Table 7-22: **Guidelines for modifying the Attachments section**

Element	Parent	Description, attributes, and usage guidelines
		The Attachment section supports the following properties:

The Attachment section supports the following properties:

- **prAttachmentOriginalPathname** - If attachmenttype="file" or attachmenttype="unclink", then this required property represents the complete path to the file attachment, including the file name and its native extension. If attachmenttype=web or attachmenttype=urllink, then this required property represents the file name and needed extension of the attachment that is delivered as part of the message.

  The following code sample demonstrates the use of the property prAttachmentOriginalPathname with a UNC link. Here this property represents the complete path to the file attachment:

```
<Attachment visible="true" attachmenttype="unclink">
    <prAttachmentOriginalPathname>
     \\sapphire\standards\legal\confidentiality.txt
    </prAttachmentOriginalPathname>
</Attachment>
```

- **prAttachmentURL** - URL, or web address, of the attachment. Use this property if attachmenttype=web or attachmenttype=urllink, and include the complete path to the file, including the file extension.

  The following code sample demonstrates the use of the property prAttachmentURL with a web page:

```
<Attachment visible="true" attachmenttype="web">
    <prAttachmentURL>
     http://www.mycompany.com/privacy.txt
    </prAttachmentURL>
    <prAttachmentOriginalPathname>
     privacy.txt
    </prAttachmentOriginalPathname>
</Attachment>
```

Note: AccuRoute Desktop supports only attachments with static content. The application cannot automatically detect default pages, and does not support scripting such as redirects and active server pages.

RoutingSheets section

Table 7-23: **Guidelines for modifying the RoutingSheets section**

Element	Parent	Description, attributes, and usage guidelines
RoutingSheets	View	Section defining the Routing Sheets associated with the view.
		Routing Sheet styles available to an AccuRoute Desktop user come from three sources:
		• ...\AccuRoute\AccuRouteServer\Languages\ENU\EmbeddedDirectives folder on the AccuRoute Server • search folders defined in the AccuRoute Desktop configuration file (AccuRouteclient.xml) • search folders specified by the AccuRoute Desktop user (if AccuRoute Desktop allows the user to add search folders) This section enables you to replace, add, or remove a Routing Sheet style from any of these sources.
		The optional attribute **overridable** enables or prevents overrides within this section. Use one of the following values:
		• **true** (default) to allow overrides • **false** to prevent overrides For example:

		`<View overridable="true" version="04.00.00">`
		`    ...`
		`    <RoutingSheets overridable="true">`
		`    ...`
		`    </RoutingSheets>`
		`    ...`
		`</View>`

		For an override to be valid, the View section must allow overrides.
		The required attribute **action** determines the function of the RoutingSheets section.
		Use one of the following values:
		‣ **replace** to replace the Routing Sheet styles from all three possible Routing Sheet style sources with the Routing Sheet styles defined in this section
		‣ **modify** to add a Routing Sheet style to the view, remove a Routing Sheet style, or set a Routing Sheet style as the default
		The following code sample demonstrates a RoutingSheets section that replaces the existing Routing Sheet styles in the view with the styles defined in the section. (This is an abbreviated example that shows the general structure of the section where the Routing Sheet action is to be defined.)

		`<View overridable="true" version="04.00.00">`
		`    ...`
		`    <RoutingSheets overridable="true" action="replace">`
		`    ...`
		`    </RoutingSheets>`
		`    ...`
		`</View>`

Table 7-23: **Guidelines for modifying the RoutingSheets section**

Element	Parent	Description, attributes, and usage guidelines

RoutingSheet	RoutingSheets	Section identifying a Routing Sheet style.
		
		The configuration of this section depends on whether RoutingSheets, the parent element, has been configured to replace or modify Routing Sheet styles:
		
		• If the RoutingSheets section is configured to **replace** Routing Sheet styles, this section identifies the Routing Sheet styles that should be available in the view.
		
		  The attribute **default** is optional. It denotes whether the Routing Sheet style is the default. Use one of the following values:
		
		  ‣ **true** to denote a default Routing Sheet style
		  ‣ **false** (default)
		
		  The following abbreviated code sample replaces the Routing Sheet styles in the view with two new styles. The second style is the default:
		
		<pre><RoutingSheets action="replace">
		    <RoutingSheet>
		        …
		    </RoutingSheet>
		    <RoutingSheet default="true">
		        …
		    </RoutingSheet>
		</RoutingSheets></pre>
		• If the RoutingSheets section is configured to **modify** Routing Sheet styles, this section indicates the modification action and the Routing Sheet style associated with the action.
		
		  The attribute **action** is required. Use one of the following values:
		
		  ‣ **add** to add a Routing Sheet template to the list of Routing Sheet styles
		  ‣ **remove** to remove a Routing Sheet style from the view
		  ‣ **modify** to set a Routing Sheet style as the default
		
		  The attribute **default** is optional. It can be used when adding or modifying a Routing Sheet style to denote that the Routing Sheet style being identified is the default. Use one of the following values:
		
		  ‣ **true** to denote a default Routing Sheet style
		  ‣ **false** (default)
		
		  The following abbreviated code sample demonstrates the removal of a Routing Sheet style and the addition of a Routing Sheet style that is the default:
		
		<pre><RoutingSheets action="modify">
		    <RoutingSheet action="remove">
		        …
		    </RoutingSheet>
		    <RoutingSheet action="add" default="true">
		        …
		    </RoutingSheet>
		</RoutingSheets></pre>

Table 7-23: **Guidelines for modifying the RoutingSheets section**

Element	Parent	Description, attributes, and usage guidelines

		The RoutingSheet section supports the following properties:
		
		• **prName** and **prDescription** - Use these properties to identify a Routing Sheet style when adding, modifying, or replacing a Routing Sheet style in the view.
		
		    prName represents the filename of the Routing Sheet template, for example, GeneralRoutingSheet.omtpl.
		
		    prDescription represents the description of the Routing Sheet template. The description of a Routing Sheet template is defined in the text file that has the same filename as the Routing Sheet template file. For example, Simple.OMTPL contains the template data and Simple.TXT contains the description.
		
		    The following code sample demonstrates the addition of the Routing Sheet template CorporateStandard.OMTPL:

```
<RoutingSheets action="modify">
      <RoutingSheet action="add">
            <prDescription>CorporateStandard</prDescription>
            <prName>CorporateStandard.omtpl</prName>
      </RoutingSheet>
      …
</RoutingSheet>
```

• **prPath** - Use this property to identify a Routing Sheet style when removing a Routing Sheet style from the view. It represents the path to the Routing Sheet template file including the filename and extension.

    Use wildcard expressions to indicate multiple Routing Sheet styles with common:

    ▸ filenames (CorporateStandard.*)

    ▸ file types (*.OMTPL)

    ▸ descriptions (*Standard)

    ▸ paths (\\sapphire\AccuRoute\AccuRouteServer\Languages\ENU\EmbeddedDirectives*)

    The following code sample removes Routing Sheet styles from the view using a wildcard expression:

```
<RoutingSheets overridable="false" action="modify">
      <RoutingSheet action="remove">
            <prPath>\\sapphire\RoutingSheetStyles\*</prPath>
      </RoutingSheet>
      …
</RoutingSheets>
```

Other AccuRoute Desktop optional configurations

This section includes:

Configuring the access code to include billing data

The view file contains a section called Transformations that enables you to conveniently "transform" or customize string values using any combination of message properties such as prOriginator, recipient properties such as prDestination, Embedded Directive properties such as prSingleUse, and template variables such as %SENDER_CUSTOM1%.

This data transformation capability enables you to modify the access code string value so that it includes the data from the billing fields in AccuRoute Desktop.

To configure the access code string value to contain data from the billing fields in AccuRoute Desktop:

1 Determine the view file where you want to add this configuration. If you are using AccuRoute Desktop out of the box, choose Default.VIEW.

2 Open the file in Notepad or an XML editor.

3 Go to the **Transformations** section. (Search on Transformations if necessary.)

4 Add the following lines:
```
<Transform transform="prAccessCode" replace="^" with="">
    <prValue>%LEGAL_BILL_01%%LEGAL_BILL_02%%LEGAL_BILL_03%
    </prValue>
</Transform>
```
This code populates the string value prAccessCode with merged data from the billing fields %LEGAL_BILL_01%, %LEGAL_BILL_02%, and %LEGAL_BILL_03%. The carets (^) in the original prAccessCode string format are removed. String values from these fields are merged with no spaces.

5 Modify the XML if necessary. Use the guidelines on creating transformations. (Go to Transformations section on 7-28.)

6 Save the view file and close it.

Hiding the Email copy to field

To hide the Email copy to field in AccuRoute Desktop:

1 Determine the view file where you want to add this configuration. If you are using AccuRoute Desktop out of the box, choose Default.VIEW.

2 Open the file in Notepad or an XML editor.

3 Go to the **UI** section. (Search on UI if necessary.)

4 Add the following lines:
```
<Control overridable="false">
     <prControlID>cbEmailCopyToMyself</prControlID>
     <prVisible>0</prVisible>
</Control>
```
This code hides the **Email copy to** option. The attribute `overridable` is set to `false`, so a derived view cannot override this configuration. (Change the value of the attribute `overridable` if necessary.)

5 Save the view file and close it.

Connecting the client automatically without prompting the user on startup

AccuRoute Desktop can be configured so that it connects to the AccuRoute server automatically—without prompting the user to log in.

To configure AccuRoute Desktop to connect to the AccuRoute Server without prompting the user to log in:

1 Locate AccuRouteclient.xml on the client (…\AccuRoute\AccuRoute Desktop) or in the AccuRoute Desktop setup on the AccuRoute server (…\AccuRoute\AccuRouteServer\Clients\AccuRoute Desktop).

   If any modifications are made to the AccuRoute Desktop setup on the AccuRoute server and the environment has an AccuRoute server cluster, AccuRoute strongly recommends repeating this procedure on the alternative AccuRoute server.

2 Open the file in Notepad or an XML editor.

3 Go to the **Servers** section. (Search on Servers if necessary.)

4 Add the following lines:
```
<Servers autoconnect="true">
     <Server default="true">
          <prServerName>[connection string]</prServerName>
     </Server>
</Servers>
```
This code enables AccuRoute Desktop to connect to the AccuRoute server automatically. The element Servers must declare `autoconnect="true"`, and the appropriate AccuRoute server must be set as the default server (`default="true"`).

5   Verify that the connection string is correct. (Go to <u>Table 5-1: Connection string formats for DCOM, HTTP, and secure HTTP connectivity</u> on 5-5.)

6   Note the following concepts pertaining to logon behavior in AccuRoute Desktop:

   ○ If the email application is configured to start automatically and `autoconnect="true"`, AccuRoute Desktop suppresses the **Connect to Server** dialog box on startup and connects to the AccuRoute server automatically.

   ○ If the email application is configured to prompt the user to select an identity/profile and `autoconnect="true"`, the user selects an email identity/profile and then AccuRoute Desktop connects to the AccuRoute server.

   ○ If the element `prMailType` uses the value `None` (See the description of `prMailType` on 6-6.) and `autoconnect="true"`, the user must complete the **Connect to Server** dialog box on startup. After providing a name and email address, the user must select **Always connect to this server**. Then AccuRoute Desktop connects to the AccuRoute server automatically.

7   Modify the XML if necessary. Use the guidelines on modifying the connection behavior. (Go to <u>Servers</u> on 6-8.)

8   Save the file and close it.

Adding the user's email address to the Email copy to field

To include the user's email address in the Email copy to field:

1   Determine the view file where you want to add this configuration. If you are using AccuRoute Desktop in its default configuration, choose Default.VIEW.

2   Open the file in Notepad or an XML editor.

3   Go to the **Defaults** section. (Search on Defaults if necessary.)

4   Add the following lines:
```
<EmbeddedDirective>
      <prAccuRouteCCMySelf>1</prAccuRouteCCMySelf>
</EmbeddedDirective>
```

5   Save the view file and close it.

Setting the default server in the Connect to Server dialog box

To set the default server in the Connect to Server dialog box:

1   Locate AccuRouteclient.xml on the client (…\AccuRoute\AccuRoute Desktop) or in the AccuRoute Desktop setup on the AccuRoute server (**…\AccuRoute\AccuRoute Server\Clients\AccuRoute Desktop**).

    If any modifications are made to the AccuRoute Desktop setup on the AccuRoute server and the environment has an AccuRoute server cluster, AccuRoute strongly recommends repeating this procedure on the alternative AccuRoute server.

2   Open the file in Notepad or an XML editor.

3   Go to the **Servers** section. (Search on Servers if necessary.)

It should look similar to the following and contain all available AccuRoute servers in your environment:
```
<Servers>
      <Server>
            <prServerName>[server A connection string]</prServerName>
      </Server>
      <Server>
            <prServerName>[server B connection string]</prServerName>
      </Server>
      <Server>
            <prServerName>[server C connection string]</prServerName>
      </Server>
</Servers>
```

4   Set the attribute `default` on the AccuRoute server that should be selected by default in the **Connect to Server** dialog box that appears on startup.

The following example shows server A as the default server:
```
<Servers>
      <Server default="true">
            <prServerName>[server A connection string]</prServerName>
      </Server>
…
</Servers>
```

5   Save the file and close it.

Setting the default cover page for fax recipients

To set the default cover page for fax recipients:

1   Determine the view file where you want to add this configuration. If you are using AccuRoute Desktop out of the box, choose Default.VIEW.

2   Open the file in Notepad or an XML editor.

3   Go to the **FaxCoverpages** section. (Search on FaxCoverpages if necessary.)

It should look similar to the following and contain the cover page styles that are associated with the view:
```
…<FaxCoverpages enabled="true">
      <FaxCoverpage>
            <prTemplateFilename>Sales</prTemplateFilename>
      </FaxCoverpage>
      <FaxCoverpage>
            <prTemplateFilename>PublicRelations</prTemplateFilename>
      </FaxCoverpage>
      <FaxCoverpage>
            <prTemplateFilename>InvestRelations
            </prTemplateFilename>
      </FaxCoverpage>…
```

4 Set the attribute `default` on the cover page that should be selected by default in the options for fax recipients.

The following example shows the last cover page style InvestRelations set as the default:

```
...<FaxCoverpages enabled="true">
      <FaxCoverpage>
            <prTemplateFilename>Sales</prTemplateFilename>
      </FaxCoverpage>
      <FaxCoverpage>
            <prTemplateFilename>PublicRelations</prTemplateFilename>
      </FaxCoverpage>
      <FaxCoverpage default="true">
            <prTemplateFilename>InvestRelations
            </prTemplateFilename>
      </FaxCoverpage>...
```

5 Save the view file and close it.

Setting the file formats that are valid for a destination type

Using the AccuRoute Server Administrator, you can configure the types of file formats that are valid for each destination type that you make available to users. This configuration is part of Registered Users, so the configuration can apply to individual users or to the default user which impacts all non-registered users.

To configure the file formats that are valid for a destination type:

1 Start the AccuRoute Server Administrator.

2 Do one of the following:

❍ **For a registered user**: Click **Registered Users** in the console tree and double-click a user in the details pane.

❍ **For all non-registered users**: Right-click **Registered Users** and select **User Defaults**.

3 Click the **AccuRoute** tab.

4 Select a destination type in the list and click **Configure**.

5 Click the **Final Forms** tab. The list displays all the file formats that are supported for the destination type. Configure the file formats as needed:

❍ To remove a final form as a valid file format for a destination type: Clear **Enabled**.

❍ To set a final form as the default selection for a destination type: View the properties of a file format and select **Default**.

6 Save your changes. (When you click **OK** on the **Registered Users** dialog box, a progress bar indicates that your changes are being saved.)

AccuRoute Queue

This section includes:

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 AccuRoute 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 AccuRoute Queue option and click Next. The Route to AccuRoute Queue page opens.

8 In the Select an AccuRoute 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.

AccuRoute Server Monitor

This section includes:

Adding the AccuRoute Server Monitor Administrator snap-in to a Remote Administrator

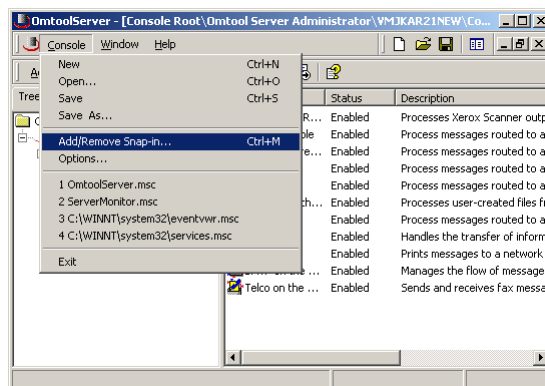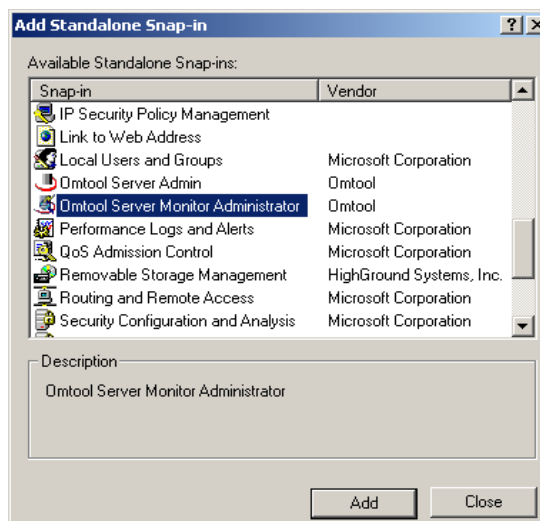If you have a Remote Administrator MMC, you can add AccuRoute Server Monitor to the MMC console.

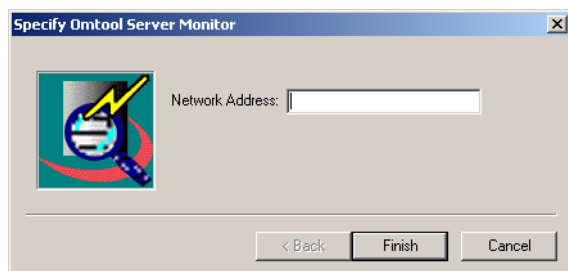**To add AccuRoute Server Monitor to the Omtool Remote Administrator:**

1   Open the Omtool Administrator.

2   Select **Console** and select **Add/Remove Snap-in**.

3   Click **Add** to view a list of available snap-ins.

4   Scroll down the list of available snap-ins, select **AccuRoute Server Monitor Administrator**, and click **Add**. The **Specify AccuRoute Server Monitor** window appears.

5   Enter the Network IP Address or name of the server you wish to monitor.

6   Click **Finish**, click **Close**, and then click **OK**.

Defining server properties

This section includes:

Defining the Suspend Monitor tab (7-52)

Adding a new suspend monitoring specification (7-53)
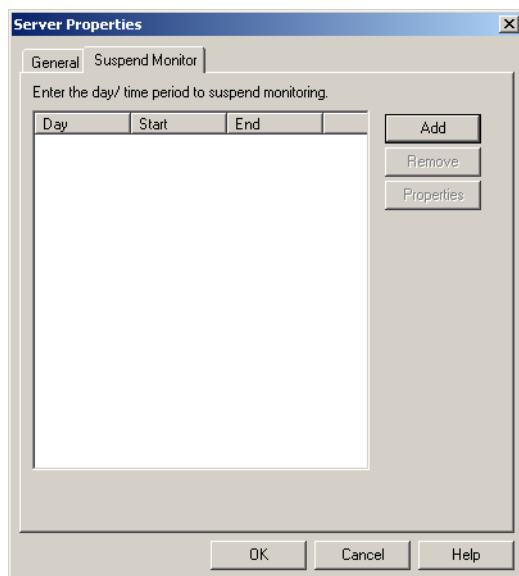
Removing a suspend monitoring specification (7-53)

Modifying the specifications for an existing Suspend Monitor item (7-54)

Defining the Suspend Monitor tab

The Suspend Monitor feature allows you to suspend monitoring of the server for specified dates and times.

To open the Suspend Monitor tab in the server properties:

Right-click the server, select **Properties**, and then Click the **Suspend Monitor** tab. (Or, highlight the server, click **Action** on the toolbar, select **Properties**, and Click the **Suspend Monitor** tab.)

The available options are:

Add - Allows you to enter new days and times to suspend monitoring.

Remove - Allows you to delete single or multiple suspend monitoring specifications.

Properties - Allows you to modify specifications for an existing Suspend Monitor item. You can only modify one item at a time.

Adding a new suspend monitoring specification

To add a new suspend monitoring specification:

1 Click **Add** on the Suspend Monitor tab. The **Suspend Monitor Data** screen appears.

2 Select the **Days of the Week** and the **Time Period** for which you want to suspend monitoring.

3 Click **OK**.

Removing a suspend monitoring specification

Use the following procedure to remove a suspend monitoring specification.
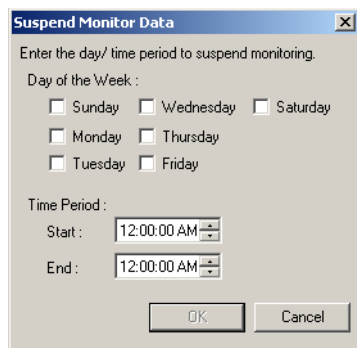
To remove a suspend monitoring specification:

1 Highlight an existing specification on the **Suspend Monitor** tab. You can also select multiple specifications using **CTRL-Click** and **Shift-Click.**

2 Click **Remove**.

3 Read the **Are you sure you want to delete the selected item?** message. Click **Yes** to delete it or **No** to keep it.

4 Click **OK** to close the **Suspend Monitor** tab.

Modifying the specifications for an existing Suspend Monitor item

To modify a suspend monitoring specification:

1   Highlight the item on the **Suspend Monitor** tab and click **Properties**. The **Suspend Monitor Data** screen appears.

2   Make any changes needed and click **OK**.

AccuRoute FaxCenter

This section includes:

Sending a test fax

Using the following procedure, you will send a test fax. Before you send the fax, you must consider the inbound routing rule you created for FaxCenter. The inbound fax will only be routed from the server to FaxCenter if the fax matches the criteria you specified in this routing rule. If necessary, you might need to modify this rule for the purposes of testing the fax. For example, if the routing rule specifies that all inbound faxes will be routed from the server to FaxCenter on Fridays only, you might need to modify this rule to include the day you are sending the test fax—unless you are sending the test fax on a Friday.

To send a test fax:

From any fax machine—including those inside your company, send a fax to a fax number in your company.

Tip	If you want to track the progress of the fax on the server, you can view the journal for that fax in the Administrator. The journal contains a log of events related to that fax.

Retrieving the test fax in FaxCenter

Using the following procedure, you will launch FaxCenter on the client system and locate the test fax in the New **Items** queue.

To locate the test fax:

1 Log on to the client system.

2 Click the **Start** button and select **Programs > FaxCenter > FaxCenter Console**. The **Connect to Server** dialog box appears.

3 Type the computer name or IP address of the server in the **Server** text box, type the e-mail address of the FaxCenter user in the **E-mail** text box, type the appropriate password for the FaxCenter user in the **Password** text box, and click **Connect**.

4 Click on the test fax in the **New Items** queue to view it in the page view pane.

Tip	If the test fax does not appear in the **New Items** queue, you can troubleshoot the fax from the Administrator. See "Click the Journal tab." on page 56.

> **Note**   Depending on the permissions you configured for the FaxCenter login account, you might only be able to view the first page of the fax or the entire fax.

5   Click the **Journal** tab.

Routing the test fax from FaxCenter to an e-mail account

Once you can view the test fax in FaxCenter, you should route it to an e-mail account that you can access. After you route the fax from FaxCenter to an e-mail account and retrieve the fax from the e-mail account, you will have simulated the steps that will occur when your company receives actual faxes.

> **Note**   When a FaxCenter user routes an inbound fax, the user can route the fax to e-mail recipients, network printers, fax machines, and your company's document management system or document repository. However, you will route the test fax to an e-mail account because it will be easy for you to retrieve it. This also allows you to test the mail connector that moves faxes to your mail server for delivery.

Using the following procedure, you will open the test fax in FaxCenter and route it to an e-mail account that you can access.

To route the test fax to your e-mail account:

1   Start FaxCenter, log in, and click on the test fax in the **New Items** queue. (If the **New Items** queue does not appear, click **View** and select **New Items**.)

2   Click **Edit** and select **Route Item**. The **Route Selected Item** dialog box appears.

3   Select your e-mail address from the list on the left and click the **Add Recipient** button, or type your e-mail address in the **Type destination or select from list** text box and click the **Add** button.

4   In the **Pages to route** text box, indicate the pages you want to route by selecting **All Pages** from the drop-down menu or typing the page numbers in the text box.

5   Under **Routing Transaction Description**, type the name of the original sender in the **Name** text box, the original sender's company name in the *Company* text box, and your comments about the fax in the **Comments** text box.

Depending on the permissions you configured for the FaxCenter login account, you might have granted permissions for this user to leave the **Name** or **Company** fields empty.

6   Click **Route**. The server prepares and sends the fax to the destination you specified, and FaxCenter moves the fax to the Processed Items queue.

7   Log in to the e-mail account where you routed the test fax.

8   In your inbox, you should see a message indicating that a FaxCenter user has routed a fax to you. Follow the instructions in the e-mail to retrieve the test fax.

Section 8: Uninstallation

This section of the AccuRoute Clients Installation Guide explains the standard uninstallation process.

This section includes:

Uninstalling AccuRoute Clients

To uninstall AccuRoute clients:

1   On the system **Control Panel**, select **Programs** > **Programs and Features** > **Uninstall or change a program**.

OR

Click **Start** > **Control Panel** > **Add/Remove Programs**.

2   Select **AccuRoute** *[Client name]* and click **Remove / Uninstall**., where *[Client name]* is the Client you want to uninstall.

3   Follow the prompts to remove the application.

To verify that AccuRoute client is removed, browse the directory structure on the client and verify that the client has been removed.

Uninstalling Accuroute Clients in Silent Mode

To remove the AccuRoute client in silent mode:

1   Log on to the client with an account that belongs to the local Administrators group.

2   Copy the AccuRoute client setup directory to a local drive, or map a drive to the folder that contains the setup program. (The setup program is required to silently remove the application.)

3   Open a command prompt.

4   Set the current directory to the AccuRoute client setup directory.

5   Run: `setup.exe /s /V"/qn REMOVE=ALL"`

This removes AccuRoute client from the default location.

Section 9: Troubleshooting

This section contains descriptions to troubleshoot different AccuRoute clients.

This section includes:

> AccuRoute Desktop (9-2)
>
> Server Monitor (9-3)
>
> Fax Center (9-4)

Note: The following clients have no troubleshooting topics.

- Web Apps
- Print to AccuRoute
- AccuRoute Queue
- AccuRoute Acquisition
- AccuRoute Connect
- AccuRoute COM API
- Cost Recovery

AccuRoute Desktop

This section includes:

Error when profiling DOCX and XLSX type documents to a Worksite v8.2 repository

Problem: When I try and profile a document of type DOCX or XLSX from AccuRoute Desktop v6.0 to a Worksite repository v8.2, the **Save** button is disabled and profiling fails.

Solution: When profiling a document from AccuRoute Desktop to WorkSite, the file type must be defined and cannot be blank. In this case, the **Type** field is blank which is the reason for the **Save** button is disabled.

WorkSite servers prior to v8.5 do not have the "out of the box" DOCX and XLSX file extensions in the registered file types. In order to use DOCX and XLSX file types, the WorkSite Administrator must add support for them by adding them to the list of registered types on the WorkSite server for a particular database. Once added, the Type field will be pre-populated in the new profile dialog for the DOCX, XLSX extensions.

To add the DOCX and XLSX document types in the Worksite server

1   Go to Worksite DMS 8.2 server system.

2   Navigate to **Start> All Programs> Interwoven server> Database Administration**. The **Worksite Database management** page opens.

3   Select **Type** to see the default file types supported list.

4   Right click and select **Add**. The **Add Type** page opens.

5   In the **Description** and **Alias** fields, specify appropriate values.

6   In the DMS extension field, enter `%V`.

7   In the App. Extension field enter `DOCX`.

8   Click **OK**

   DOCX file format is added as a new file type and displayed along with the existing file types.

9   Similarly add the **XLSX** extension (In the App. Extension field enter `XLSX`.)

After you have added the file types, you can successfully profile documents with file types DOCX and XLSX to the Worksite v8.2 repository.

Server Monitor

This section includes:

The information in the following sections will help you troubleshoot Server Monitor.

1607 error

If you receive a 1607 error when installing Server Monitor, make sure you are not installing to a Windows Server that is running in Terminal Server Application mode. This is not a supported environment.

Configuration file

All settings for Server Monitor are contained in the `omsvrmonitor.config` file. When the Server Monitor Services opens, it reads the settings contained in this file.

The `omsvrmonitor.config` file is located in the `...\AccuRoute\ServerMonitor` directory.

> **Note** In a clustered environment, when control passes to the secondary server, tests continue to be performed. The `omsvrmonitor.config` file, however, is not updated with the secondary server's name.

Connecting to the Server Monitor Service

When the Server Monitor Administrator starts, it attempts to detect the Server Monitor Service locally. If the Server Monitor Service is not installed, the following error occurs: Failed to connect to specified monitor service (0x80040154). Click **OK** on the message box and proceed to Connecting to the AccuRoute Server Monitor Service (3-3).

Clustered environments

If you have declared a preferred server, the preferred server must be active when you add it to Server Monitor.

Fax Center

This section includes:

Tracking the status of the fax on the server

You can track the progress of the test fax on the server using the Administrator. If the server did not route the inbound fax to FaxCenter, did not deliver the fax for another reason, or paused during the processing of the fax, you can view the journal for that fax and see a log of events related to that fax.

Once the server routes the test fax to FaxCenter, you can view the journal for that fax in FaxCenter.

To view the test fax on the server:

1   Start the Administrator.

2   Expand the **Messages** item in the console tree and select **In Process**.

The **In Process** folder displays all messages and faxes being processed on the server. In the details pane, the top section displays a set of bar graphs, also called barometers, that represent the different processing phases of a fax. You can resize the Administrator window if necessary to view all the barometers.

Each barometer has a number that indicates the number of items in that processing phase. As items move through various phases of processing, the visual indicators on the barometers change in real-time.

Using these barometers, you can locate the processing phase of your test fax and watch it move through the other phases until the server dispatches the fax to FaxCenter.

3   Click the option button above the barometer you want to view.

If you cannot locate your test fax in the **In Process** queue, repeat these steps in the **History** queue.

4   Right-click on the test fax and select **Properties**.

5   Click the **Journal** tab.

Review the list of events. (Double-click an event to view more information about it.) If the server did not route the inbound fax to FaxCenter, did not deliver the fax, or paused during the processing of the fax, the journal provides you with the information you need to troubleshoot the issue.

Tip   If you make any modifications to the settings on the server and you want to send your test fax again, you can resend the fax from the Administrator. For more information, refer to the Administrator help: http://www.AccuRoute.com/documentation/accuroute/6.0/faxcenter/faxcenteruserguide.pdf

Checking inbound routing rules

When you troubleshoot your test fax, make sure that you created an inbound routing rule for FaxCenter. Also, verify that the details in this rule will route faxes to FaxCenter and that the appropriate FaxCenter users should receive faxes. If you configured the server to route faxes to all FaxCenter users, all FaxCenter users should be able to view the test fax in the New Items queue. If you configured the server to route faxes to a particular FaxCenter user, only that user should be able to view the test fax in the New Items queue.

Verify the installation of an image viewer

If an image viewer is not installed, you will not be able to view the test fax in FaxCenter.