Release Notes for AccuRoute v2.3

Product: AccuRoute 2.3

Release date: February 2009

Version 060209

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The Release Notes contain information on new features, enhancements, resolutions and limitations for AccuRoute v2.3.

New features

The new features in AccuRoute v2.3 are as follows:

AccuRoute Web Client v2.0

AccuRoute Web Client v2.0 is an ASP.NET based application replacing the legacy Omtool Web Client. For installation and configuration instructions, consult the AccuRoute Web Client installation guide. For instructions on how to use the AccuRoute Web Client, consult the AccuRoute Web Client online help.

> *Note*　　　　The AccuRoute Web Client is not cluster aware.

Additional output formats for OCR

The following output formats have been added for OCR:

- PDF (OCR+Text)
- Word Perfect
- Microsoft Excel

> *Note*　　　　The difference between PDF (OCR Image+Text) and PDF (OCR Text) is that the PDF (OCR Text) option does not have an image overlay.

Barcode Extractor component

The Barcode Extractor allows the AccuRoute server to read and process Barcoded Cover Sheets (or separator pages) generated by third party vendors such as the CA Records Manager (formerly CA MDY FileSurf) Web client. This integration provides an alternate way of routing documents to the FileSurf repository using the AccuRoute server. It is useful in situations where the user has access to CA Records Manager Web client only or has no access to the AccuRoute Desktop client or the Records Manager desktop client interfaces (stand-alone or Outlook-integrated).

When a user generates a separator page using the CA Records Manager Web client, a page is created in the FileSurf repository. Now when the user goes to a multifunction device and scans a document with the separator page as the first of the document, the document is submitted to the AccuRoute server via the FileSurf connector for processing. The Barcode Extractor component of the AccuRoute server processes the document and reads the data in the barcodes of the separator page. Using the instructions in the barcodes, the AccuRoute server routes the document to the FileSurf repository where it is attached to the appropriate placeholder created earlier by the separator page.

> *Note*   Note: The separator pages are for one time use only.

AccuRoute server v2.3 installs the Barcode Extractor component by default. A purchased license number is required to enable this component. Contact [Omtool sales](#) for more information.

You can have up to four (4) instances of the Barcode Extractor component running simultaneously in your server environment.

Configuration Instructions

To enable the Barcode Extractor component:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR** to open the server Administrator.

2   In the console tree, double click **COMPONENTS**.

       All the server components are listed in the details pane.

3   Double click **Barcode Extractor** component to open the **Properties** page. Click the **ENTER LICENSE** option. The **License** page opens. In the **LICENSE** text box, enter a valid license number.

4   Click **OK**.

       The license number is verified and if it is a valid license number, the Barcode Extractor component is enabled. Now the **Properties** page lists the license number of the component.

Configuring routing rules for Barcode Extractor component

Before the Barcode Extractor component can process jobs, you must configure the routing rules that route jobs to the Barcode Extractor component.

To configure the Route to Connector page when creating rules:

1   In the **Route to Connector** page, go to the **Document Delivery Format** option.

2   Select **PDF** from the drop down menu.

3   Click **ADVANCED** to set the Core property value.

              The **Advanced Routing Options** page opens.

4   Click **CUSTOM PROPERTIES**.

              The **DMS Rule Properties** page opens.

5   Select **CORE PROPERTIES**. Click **ADD**.

              The **Core Property** page opens.

6   In the **NAME** text box, enter `prDataExtraction`. In the **VALUE** text box, enter **3**.

7   Click **OK**, **OK**, **OK** and **FINISH** to close the Route to Connector page.

Composer features

This section includes:

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Composer class

The Composer component has a configurable composer class in AccuRoute v2.3. Setting a composer class for a Composer is useful in situations where you want a Composer to process specific scan jobs based on the source of the scan job, for example, you want a specific composer to handle jobs that originate in the mail room.

To configure the composer class, the Omtool Server Administrator has to modify the `prComposerClass` property of the Composer you are configuring. By default, the value of this property is a blank string. The Administrator can set any desired text string for this property.

When you configure a composer class for a Composer, the composer will only process jobs that have a matching prComposerClass property assigned to them.

Note   *A scan job without this property set is the same as a "blank" and therefore will match any composer that has the prComposerClass property set as a blank string.*

If a job specifies a composer class (including missing or blank property) that does not have a corresponding composer assigned to that class, the job will fail with the following message:

```
No conversion server configured
```

Configuration Instructions

To configure the composer class for a Composer:

1   Double click the **COMPOSE** component to open the **Properties** page.

2   Click **COMPOSERS** to open the **Composers** page listing the composers in your environment opens.

3   Select the composer you want to configure and click **PROPERTIES**. The **Composer Package Properties** page opens.

4   In the **CLASS** text box, enter the desired text string value, for example "mailroom".

Note   The value of the class should match the scanner value for the same property.

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

6   Now add the same property value in the control file for the job.

Configuring the control file

To configure the control file for the scan job:

1   Open the control file and add the variable: `#prComposerClass mailroom`

2   Save your changes.

Note   All scan jobs associated with this control file are processed by the composer class specified in the variable.

For instructions on how to create to edit a control file or a virtual control file, consult the Server Administrator help.

Composer priority

The composer component can be configured to have a priority for composing messages. The default priority is **Normal**. You can set the composer to have a **Low** or a **Very low** priority if needed. For example, OCR jobs are resource intensive and absorb 100% of CPU starving other processes on the machine. You can therefore, set the composer designated to process OCR jobs to a low priority. This will allow all other jobs to proceed ahead of the OCR job and reduce queue congestion.

Configuration Instructions

To configure composer priority:

1   Double click the **COMPOSE** component to open the **Properties** page.

2   Click **COMPOSERS** to open the **Composers** page listing the composers in your environment opens.

3   Select the composer you want to configure and click **PROPERTIES**. The **Composer Package Properties** page opens.

4   In the **CONVERSION PRIORITY** drop down list, select one of the priority level:

   ‣ **LOW**

   ‣ **VERY LOW**

   Note   The default priority level is **NORMAL**.

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

Compression option added to Compose properties

A **Compression** option has been added to the Composer **Properties** page where you can configure the level of compression on the final document output.

Note   Compression is applied to files resulting in a PDF type format. Doc and Tiff files can appear to be compressed but that is handled through the native compose engine for those file types and does not use the specified compression settings talked about here.

Configuration Instructions

To configure compression:

1   Double click Composer component to open the properties page.

2   Click **COMPRESSION** to open the **Compression** page.

3   From the **COMPRESSION** drop down list, select the level of compression you want to set. The choices are **MAXIMUM**, **NORMAL** (the default) and **NONE**.

4   From the **COLOR FORMAT** drop down list, select the color format to use. The choices are **JPEG** (the default) and **JPEG2000**.

   Note   The black and white format (B&W Format) uses the JBIG2 format.

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

Large Job Composer

Large job composers are configured primarily for scanning large documents that can be resource intensive. The advantage of configuring a large job composer is that it allows time consuming scan jobs to be handled by a specific composer thereby freeing up other smaller or more important jobs to continue through the system without being blocked for a long time by the large jobs.

> *Note*   omtpl files can be composed by a composer specified as the Large Job composer. However, unchecking these file types in the composer properties will prevent the Large job composer from processing these files.

A scan job is handled by the large job composer only if:

- it meets a specified document file size criteria
- it meets a certain page count number (for PDF and TIF only)
- the scan job was marked for a large job composer (by setting `prUseLargeJobComposer` to `1` on the job or in the control file to route the job).

> *Note*   A scan jobs that time out the first time is marked for a large job composer automatically for the retry.

If you request a large job composer for a job and a large job composer does not exist in your environment, the message does not queue up on a normal composer and fails.

Configuration Instructions

To configure a composer as a large job composer:

1   Double click the **COMPOSE** component in the Component details page.

     The **Properties** page opens.

2   Click **COMPOSERS** to open the **Composers** page listing the composers in your environment.

3   Select the composer you want to configure as a large job composer.

4   Click **PROPERTIES**.

     The **Composer Package Properties** page opens.

5   Click the check box beside the **LARGE JOBS** option.

6   Specify the criteria for the job. For example, you can specify the scan job to be handled by the large composer if:

     - it meets a specified document file size criteria

     - it meets a certain page count size (for PDF and TIF only)

     - the scan job was marked for a large job composer (by setting `prUseLargeJobComposer` to `1` on the job or in the control file to route the job).

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

Multiple composers

A fresh AccuRoute 2.3 server installation comes with two Composers.

- One composer for OCR processing
- One composer for general processing

Important	This ensures that an OCR composition (which can be resource intensive) does not use 100% of the system resources at any given point of time.

By default, OCR formats are enabled for the OCR composer with all templates disabled. By default, only g4.tif, g4h.tif, pdf formats are enabled for the General composer with all templates enabled.

Note	If you upgrade from an earlier version of the AccuRoute server, you will see only one composer. If you have one default composer and wish to take advantage of the new composer options, contact Omtool sales for licensing information.

OCR options

You can configure OCR options in the Composer **Properties** page. The available OCR options are **Most Accurate**, **Balanced for speed and accuracy** and **Fastest.**

- The **Most Accurate** option uses a three way voting system and spends the most time combing through the OCR.

- The **Balanced for speed and accuracy** option uses a two way voting system and a balanced tradeoff approach to accuracy and speed of recognition. Therefore, in certain cases, it could be about 33% quicker than the Most Accurate option.

- The **Fastest** option uses a two way voting system with a tradeoff that favors speed over accuracy.

Note	The results of all the three settings vary, depending on the quality of the input document.

In general the **Most Accurate** option should be used for scanned or faxed documents since it is difficult to control the quality of the input document. However, if you have a good scanner device or you are submitting clean digital images, you can then select **Balanced for speed and accuracy** or **Fastest** options to speed up OCR without losing recognition accuracy.

Configuration Instructions

To configure OCR options:

1   Double click the **COMPOSE** component in the **Components** details page. The **Properties** page opens.

2   Click **OCR** in the **Properties** page. The **OCR** page opens.

The OCR page has the following sections:

- **OUTPUT FORMAT** - The output format section lists all the output formats the AccuRoute server supports for OCR.

- **ACCURACY** - This section lists the Accuracy versus Speed trade-off.

3   To configure the **Output Format** for each output type (for example, the format **Doc (OCR Text)** can be changed from **Word2000** to **Word97**), do the following:

     a   Select the output format and click **PROPERTIES**. The **Output Format** page opens.

     b   In the **OUTPUT FORMAT** drop down list, select the new format.

     c   Click **OK** to go back to the OCR page.

4   To configure the **Accuracy** option, select from **MOST ACCURATE**, **BALANCED FOR SPEED AND ACCURACY**, and **FASTEST** options.

Configuring OCR Exceptions

File types that are added to the Exceptions area are not OCRed by the composer during the conversion process. By adding the appropriate file types you can reduce the amount of documents that are OCRed, thus speeding up the overall compose process.

Here is an example of how Exceptions works - A user wants a server rule that sends *everything * to a text searchable PDF. The user wants OCR to happen for image file types only. By adding doc, rtf, and txt to the exception list the user can make sure that documents of that type are not OCRed.

In the **Languages** page, you can enable or disable the languages supported by the OCR process.

Note   Exceptions & Languages replace the previously used registry settings that enabled the same functionality. As of this release, the manual changes are no longer available.

To configure exceptions and languages:

1   In the Composer Properties page, click **OCR** and then click **ADVANCED** to open the **OCR Properties** page.

2   In the **OCR Exceptions** section, add or remove OCR exceptions using the following procedure:

     a   To add a file extension, click **ADD**. The **OCR Exceptions** page opens.

     b   Choose a file extension from the drop down menu.

     c   Click **OK** to close the OCR Exceptions page.

         File types of the extension you added will not be OCRed by the composer.

3   To remove a file extension from the **Exceptions** section, select the extension type and click **REMOVE**.

       File types of the extension you removed will now get OCRed during the conversion process.

Note   Exceptions & Languages replace the previously used registry settings that enabled the same functionality. As of this release, the registry hacks are no longer available.

CPU Core Check

During AccuRoute server installation, the system automatically performs a CPU licensing validation check. The standard AccuRoute license allows use of product on a system with up to four (4) CPU cores.

For four or less CPU cores, no pop-ups are issued during license validation. If the license check finds more than four CPU cores, it opens a pop-up with the following message:

```
Detected XX CPU cores, you should verify that you have the proper
licensing to run this product.
```

You are also prompted to contact Omtool sales representative to verify your licensing status. Close the pop-up by clicking **CLOSE** and proceed with the server installation.

Cost Recovery changes

The Cost Recovery feature has been enhanced to allow the Omtool Server Administrator to define an external database containing the cost recovery billing fields. The standard AccuRoute v2.3 installation creates a CostRecovery table in the AccuRoute Archive database. When the Administrator enables billing, he can optionally configure the DSN to point to the external database and configure the Cost Recovery table.

> *Note*   During an upgrade the existing servers, the CostRecovery table is copied (Schema & Contents) into the AccuRoute Archive database as the new CostRecovery table and the Billing component is configured to use the table.

Configuration Instructions

To define an external database for Cost Recovery configuration:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR** to open the server Administrator.

2   In the console tree, double click **COMPONENTS**.

All the server components are listed in the details pane.

3   Double click **Billing** component to open the **Properties** page.

4   Click **CONFIGURATION**.

5   Check the box beside **ENABLE COLLECTION OF BILLING DATA** option.

6   In the **Database** section, modify the Data Source Name (DSN) to point to the external ADO compatible database.

> *Note*   By default, the DSN points to the AccuRoute Archive Database which includes all billing table to collect all billing data.

7   In the **Table** section, verify that the **COSTRECOVERYDATA** table is selected.

8   Select the columns that should be populated. Any column you do not select will not have data entered for them and must be either nullable or have `defaults` configured in the table itself. When writing a billing record, if you do not have a value for that column or you are not configured to place a value into a column, the null or the default specified value is inserted in the column.

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

Default outbound Routing Rules

A number of outbound routing rules are created by default with a fresh installation of AccuRoute server v2.3. These
rules are typical in an environment that uses scanning devices to route messages to the AccuRoute server.

The new routing rules are as follows:

For MyAccuRoute

- Use the Embedded Directive Manager and select originator as myaccuroute or
  myaccuroute@[machine name].[fully qualified domain name] or myaccuroute@[machine name].

For Routing Sheet

- If Destination is an e-mail address is routingsheet or accuroute then Use the Embedded Directive
  Manager to determine actions

- If Destination is an e-mail address is routingsheet or accuroute then Fail message (silently)

For destination fax is 222876883

- If Destination is a Fax Number is 222876883 then Use the Embedded Directive Manager to determine
  actions

- If Destination is a Fax Number is 222876883 then Fail message (silently)

For specific Embedded Directive

- Use Embedded Directive Manager then select Use Sender-specified Embedded Directive" option.

- If job is a notification and Destination is an e-mail address is * then Route to SMTP on the Server

- If Destination is an e-mail address is * then Route to SMTP on the Server

- If Destination is an e-mail address is pdf or pdf@[machine name] or pdf@[machine name].[fully
  qualified domain name] then Route to SMTP on the Server (Overriding: Destination %prOriginator%)

- If Destination is an e-mail address is tif or tif@[machine name] or tif@[machine name].[fully qualified
  domain name] then Route to SMTP on the Server (Overriding: Destination %prOriginator%)

- If Destination is an e-mail address is txt.pdf or txt.pdf[machine name] or txt.pdf@[machine
  name].[fully qualified domain name] then Route to SMTP on the Server (Overriding: Destination
  %prOriginator%)

- If Destination is an e-mail address is ocr.pdf or ocr.pdf@[machine name] or ocr.pdf@[machine
  name].[fully qualified domain name] or ocr or ocr@[machine name] or ocr@[machine name].[fully
  qualified domain name] then Route to SMTP on the Server (Overriding: Destination %prOriginator%)

- If Destination is an e-mail address is ocr.rtf or ocr.rtf@[machine name] or ocr.rtf@[machine name].[fully qualified domain name] then Route to SMTP on the Server (Overriding: Destination %prOriginator%)

- If Destination is an e-mail address is ocr.doc or ocr.doc@[machine name] or ocr.doc@[machine name].[fully qualified domain name] then Route to SMTP on the Server (Overriding: Destination %prOriginator%)

- If Destination is an e-mail address is ocr.txt or ocr.txt@[machine name] or ocr.txt@[machine name].[fully qualified domain name] then Route to SMTP on the Server (Overriding: Destination %prOriginator%)

- If Destination is an e-mail address is ocr.xls or ocr.xls@[machine name] or ocr.xls@[machine name].[fully qualified domain name] then Route to SMTP on the Server (Overriding: Destination %prOriginator%)

- If Destination is an e-mail address is ocr.wpd or ocr.wpd@[machine name] or ocr.wpd@[machine name].[fully qualified domain name] then Route to SMTP on the Server (Overriding: Destination %prOriginator%)

Scanning from a device with the 'Scan to Folder' option enabled

If you are scanning a document from a device with the 'Scan to Folder' option enabled, you must create the default outbound rule.

If email address is filescan or filescan@[PCName].[Domain] or filescan@[PCName] then route to filescan connector

Then setup the folder location to route the jobs or silently fail if you intend to not use the Scan to Folder application.

The new rules are not available when you upgrade from a legacy AccuRoute server system. After an upgrade, you can create the new SMTP rules by deleting the existing SMTP connector and adding an SMTP connector for AccuRoute v2.3.

Document Splitting

You can configure the Composer component to split a large document into smaller pieces on the local composer. The individual pieces are then distributed to remote composers where they are processed simultaneously to the limit of configured composers. Once all the individual pieces are processed, they are reassembled into the final form.

Note	If any of the chunks that are being composed fail, the whole compose fails.

The advantage of splitting a document is that it can allow a 100 page document to be broken into four 25 page documents and processed simultaneously by four composers thereby resulting in faster composing and reducing queue congestion.

You can enable document splitting if the format for source documents are TIF & PDF only and the output format is one of the following PDF formats:

- PDF
- TXT.PDF
- OCR.PDF

You can also enable document splitting if the format for source and output document is the TIF format. The settings for document splitting is ignored for all other document types.

Configuration Instructions

To enable document splitting:

1   Double click the **COMPOSE** component in the Component details page.

     The **Properties** page opens. to open the

2   Click **DOCUMENT SPLITTING** to open the **Document Splitting** page.

3   Check the box beside the **ENABLE DOCUMENT SPLITTING** option.

4   In the **MINIMUM DOCUMENT SIZE TO SPLIT** text box, specify the minimum number of pages a document must have, so that it can be considered for document splitting.
     Only those documents that are equal to or greater than the size you specify here can be considered here for document splitting. The default is 20 pages.

5   In the **SPLIT DOCUMENTS INTO** text box, specify the number of pages each section should have when the original document is broken down into sections for compose. The default is 10 pages.

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

Embedded Directive changes in the MMC Admin

Embedded Directive changes in the MMC Admin include:

Finding an Embedded Directive from the Embedded Directive Manager component

The Embedded Directive Manager component in AccuRoute v2.3 allows the Omtool Server Administrator to set the criteria to base the search for specific Embedded Directives. Using a search filter significantly reduces the time taken to return EDs matching the search criteria. Moreover, since the list of returned EDs can be small, it provides more efficient ED management.

Configuration Instructions

Searching for EDs

To search for EDs from the Embedded Directive Manager component:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR** to open the server Administrator.

2   In the console tree, double click **COMPONENTS**.

     All the server components are listed in the details pane.

3   Double click **Embedded Directive Manager** component to open the **Properties** page.

4   Click **ADVANCED**. The **Embedded Directive Management** page opens.

5   Select the search criteria. For example, you can check the box beside **OWNER E-MAIL** and enter the email address. Then check the box beside **DATE CREATED** and select the date.

6   Click **FIND**. The search returns the EDs created by the particular user at a specific date.

Once the list of EDs are returned by the search criteria, the Administrator can change the ownership of the Embedded Directive or delete the ED if it is no longer used and needed. He can also view the properties of an ED.

Changing ownership of the ED

To change ownership of the ED:

1   Select the ED from the ED list.

2   Click **SET OWNER**. The **Set Embedded Directive Owner** page opens.

3   In the **OWNER E-MAIL** text box, enter the email address of the new owner.

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

Depending upon your search criteria, the ED can be listed or removed from the ED list. For example, if your search criteria was owner email, the ED will be removed from the list. On the other hand, if your search criteria was date created, it will still be listed.

Deleting an ED

To delete an ED:

1   Select the ED from the ED list.

2   Click **DELETE**. You are prompted to confirm the delete.

3   Click **YES**.

The ED is deleted and removed from the list.

Finding an ED from Rules in the Route to Embedded Directive Manager page

For all rules that route to the Embedded Directive Manager, the Administrator can now choose the Embedded Directives to assign to the rule. This increases the response time for the Omtool server to process documents matching the rule.

For information on how to search and select Embedded Directives from rules, consult the Omtool Server Administrator guide.

Image Enhancement

Image Enhancement is extremely beneficial when scanning and routing paper documents since images captured from paper documents are not always as clear as electronic documents. Before a paper document is captured into an image, it is a physical article subject to influences that may degrade the quality of the document. In addition, the scanning device where you scan a document can have dust or smudges on the scanning unit that can cause imperfections in the scanned copy of the document.

You can configure the AccuRoute Server to perform several Image Enhancement tasks. For example, you can:

- **Despeckle** - Both black and white noise reduction are available

- **Deskew** - Correct pages that are not correctly aligned when fed through the scanner
- **Rotate** - Correct page orientation
- **Blank Page Dropout** - Support for first, last and all blank pages is provided
- **Binarize** - Which converts to monochrome format

Note	Page orientation is automatically done by ScanSoft engine when performing OCR. You do not need to configure Image Enhancement if all you need is page orientation for OCR scan jobs.

You can define multiple combinations of Image Enhancement processes. You should however select only one combination of processes per scan job. This is because Image Enhancement is a moderately resource intensive process and using every cleanup option on every job can lead to an inefficient document workflow.

Image Enhancement options are applied to jobs that are processed by the ScanSoft engine. The ScanSoft engine is used when:

- The input file is an image file (BMP, JPEG, TIF, etc.) and the output type is PDF
- The input file is a PDF or TIF and the output type is an OCR output type (OCR.PDF, OCR.RTF, etc.)
- The input file is an image-only PDF (Defined as a PDF that has only image elements) and the output type is an OCR format

Note	Typically, scanned PDFs (image-only) routing to an OCR output type will have the requested image enhancement. Jobs that are not applicable for image enhancements will not error if you request image enhancement from them.

The Image Enhancement processes are controlled by the specific value assigned to the server property `prImageEnhancements` inside a control file. The valid values for `prImageEnhancements` are based on a binary flag.

The following table lists all the Image Enhancement options and their binary value. You can create new cleanup combinations using the base options available. For example, to Deskew and Rotate an image the `prImageEnhancements` property value should be set to 3 (Deskew + Rotate). To Deskew, Rotate, and Binarize the `prImageEnhancements` property value should be set to 35 (Deskew + Rotate + Binarize). The value of "-1" represents all options on and 0 represents all options off, which is the system default value.

Table 1-A: **Image Enhancement Options**

Image Enhancement feature	Description	Binary Value
None	No image enhancement occurs when you set this option	0
Deskew	Straightens images that are skewed between 1 and 15 degrees.	1
Rotate	Rotates an image to it's correct orientation. This is useful for flipping pages that may have been scanned upside down.	2
Blank page dropout	Removes all blank pages. **Note: This operation takes precedence over BlankPageDropoutFirst and BlankPageDropoutLast.**	4
Blank page dropout first page	Removes the first page of a document if it is blank	8

Table 1-A: **Image Enhancement Options**

Image Enhancement feature	Description	Binary Value
Blank page dropout last page	Removes the last page if it is blank	16
Binarize	Converts image to black and white	32
Clean Black Noise	Removes black specks from image. Using this setting forces Binarize to happen.	64
Clean White Noise	Removes white specks from image. This is useful for scans that are really light where there are lots of white specks in the letter blocks. Using this setting forces Binarize to happen.	128
ALL	Performs all image enhancement operations	-1

Note   Setting `prImageEnhancements` property value to `-1` enables all image enhancements which includes the Binarize option. The Binarize operation converts color images to black and white.
Moreover, when the property value is set to -1, then blank page dropout is set to remove all blank pages (and not just first or last pages).

You can set Image Enhancement property in the control file (or the virtual control file) of the Filescan connector. You can also set the Image Enhancement property in the Custom Properties page of a Route to Connector rule.

Configuration Instructions

To configure Image Enhancement for documents picked up by the Filescan connector:

1   Open the control file and enter: `#prImageEnhancements`

Note   For instructions on how to create to edit a control file or a virtual control file, consult the Server Administrator help.

2   Set the value of the property following the guidelines in [Image Enhancement Options](#) (14).

3   Save your changes.

Now when a scanned document is picked up and processed by the Filescan connector, image enhancement, if applicable, is applied.

To set the Image Enhancement property for a Route to Connector rule:

1   Open the Omtool Server Administrator and open the rule you want to modify.

2   Open the **Route to Connector** page and click **ADVANCED OPTION**.

Note   For instructions on how to edit a rule, consult the Server Administrator help.

The **Advanced Routing Options** page opens.

3   Click **CUSTOM PROPERTIES**. The **DMS Rule Properties** page opens.

4   Select **Custom Property** and click **ADD**. The **Custom Property** page opens.

5   In the **NAME** text box enter `prImageEnhancements`.

6   In the **VALUE** text box set the value of the property following the guidelines in <u>Image Enhancement Options</u> (14).

7   Verify that **TYPE** is set to String.

8   Click **OK** to save the property.

Now when a scanned document is picked up and processed by the connector, image enhancement, if applicable, is applied.

List of supported DMS fields

The following table lists DMS variables that are now available for substitution on a Routing Sheet. For instructions on how to use these variables in Routing Sheet, consult the Omtool Server Administrator help.

Note	Note: A recipient template variable to be used on the Routing sheet must look like:`%DMS_xxxx.1%` for the xxxx template variable of the first DMS recipient and `%DMS_yyyy.2%` for the yyyy template variable of the second DMS recipient and so on.

Table 1-B:

Variable	Description	Supported DMS
%DMS_MD_DOCUMENT_ID.1%	Unique internal DMS ID of the document	• WorkSite • iManage • DM • WorldOX • FileShare • MyFolder • DocsOpen • Documentum
%DMS_MD_DOCUMENT_NAME.1%	Name or the title of the document	• WorkSite • iManage • DM • WorldOX • FileShare • MyFolder • DocsOpen • Documentum

Table 1-B:

Variable	Description	Supported DMS
%DMS_MD_DOCUMENT_FRIENDLY_NAME.1%	Friendly name of the document usually consisting of the title and document's number	• WorkSite • iManage • DM • WorldOX • FileShare • MyFolder • DocsOpen • Documentum
%DMS_MD_DOCUMENT_NUMBER.1%	Document's number	• WorkSite • iManage • DM • DocsOpen
%DMS_MD_DOCUMENT_COMMENTS.1%	Document's comments	• WorkSite • iManage • DM • WorldOX • DocsOpen • Documentum
%DMS_MD_DOCUMENT_VERSION.1%	Document's version number	• WorkSite • iManage • DM • DocsOpen
%DMS_MD_DOCUMENT_LIBRARY.1%	DMS Library where the document reside	• WorkSite • iManage • DM • Documentum
%DMS_MD_DOCUMENT_FOLDERID.1%	Unique internal DMS ID of the document's folder	• WorkSite • iManage • DM • Documentum
%DMS_MD_DOCUMENT_FOLDERID_DISPLAY.1%	DMS folder's name as shown in the DMS Client	• WorkSite • iManage • DM
%DMS_MD_DOCUMENT_CLIENT.1%	Client ID field of the document's profile	• WorkSite • iManage • DM • DocsOpen

Table 1-B:

Variable	Description	Supported DMS
%DMS_MD_DOCUMENT_CLIENT_DISPLAY.1%	Full display name of the Client's field	• WorkSite • iManage • DM • DocsOpen
%DMS_MD_DOCUMENT_MATTER.1%	Matter ID field of the document's profile	• WorkSite • iManage • DM • DocsOpen
%DMS_MD_DOCUMENT_MATTER_DISPLAY.1%	Full display name of the Matter's field	• WorkSite • iManage • DM • DocsOpen
%DMS_MD_DOCUMENT_CLASS.1%	Document's Class ID field	• WorkSite • iManage • DM • WorldOX
%DMS_MD_DOCUMENT_CLASS_DISPLAY.1%	Full display name of the document's Class field	• WorkSite • iManage • DM
%DMS_MD_DOCUMENT_SUBCLASS.1%	Document's Subclass ID field	• WorkSite • iManage
%DMS_MD_DOCUMENT_SUBCLASS_DISPLAY.1%	Full display name of the document's Subclass field	• WorkSite • iManage
%DMS_MD_DOCUMENT_AUTHOR.1%	Document's Author ID field	• WorkSite • iManage • DM • WorldOX • DocsOpen • Documentum
%DMS_MD_DOCUMENT_AUTHOR_DISPLAY.1%	Full display name of the document's Author field	• WorkSite • iManage • DM • DocsOpen

Table 1-B:

Variable	Description	Supported DMS
%DMS_MD_DOCUMENT_TYPE.1%	Document's Type ID field	• WorkSite • iManage • DM • Documentum
%DMS_MD_DOCUMENT_TYPE_DISPLAY.1%	Full display name of the document's Type field	• WorkSite • iManage • DM

Additionally, all DMS Custom fields (that you can view in a default document profile dialog in a DMS Connector's admin extension) are also published in the Routing Sheet using the following naming scheme:

- `%CF_InternalDMSFieldName%`

- `%CF_ InternalDMSFieldName _DISPLAY%`

MyAccuRoute Updates

MyAccuRoute allows the AccuRoute Server Administrator to configure the destination of documents scanned from a multifunction device using MyAccuRoute. The destination can be the user's email (the default) or his Active Directory home folder as specified by the Administrator.

Specifying the destination as a folder is useful when the device user does not have any specific MyAccuRoute Embedded Directive defined. In this case, when he logs into the device and uses MyAccuRoute to scan a document, the process initiates an LDAP query to locate the destination folder and routes the scanned document to that folder.

In addition to specifying the destination, the AccuRoute Server Administrator can also specify the name and the format of the delivered scanned document.

Configuration Instructions

To configure MyAccuRoute in the Embedded Directive Manager component, follow these steps:

1   Double click **EMBEDDED DIRECTIVE MANAGER** component to open the **Properties** page.

2   Click **MYACCUROUTE**.

3   Check the box beside **ENABLE THE ADDITIONAL MYACCUROUTE PROCESSING FOR ROUTING TO A USER'S FOLDER VIA LDAP LOOKUP** option.

4   Click **ADD**. The **Lookup Propertie**s page opens and shows the **Connection**.

5   In the **General** section, configure the following:

    a   In the **SERVER ADDRESS** text box, enter the server running the Active Directory.

    b   In the **PORT** text box, enter the port number (the default is 389).

    c   In the **DESCRIPTION** text box, enter a description of the folder (the default is Folder Lookup).

6   In the **Logon** section, enter the login credentials of an user with permissions to perform lookups and click **SEARCH**.

Note	You can use Anonymous if it is supported by your LDAP.

7   Check the box beside **BIND USING WINDOWS GENERIC SECURITY SERVICES** option if you entered a user name in the **Username** text box in step **6**. If you entered an email address, do not select this option.

8   In the **General** section of the Search page, configure the following:

9   In the **SEARCH BASE** text box, enter the full domain name. For example, if your full domain name is test.mycompany.com, enter `dc=test, dc=mycompany, dc=com`.

10   Set the **SEARCH TIMEOUT** option. The default is `10` minutes.

11   If necessary, configure a **SEARCH** filter.

12   For **Scope**, select the checkbox beside the **RECURSIVE** option if you want the LDAP query to search recursively. If you want the LDAP query to search only at the specified search base, do not select the **Recursive** option.

13   Click **TEST** and enter the required attribute value to perform the search operation in the Lookup Test page. This will help you test that the Connection and Search Base is configured correctly.

14   Click **CLOSE** then **OK** to go to the **MyAccuRoute** page.

15   In the MyAccuRoute page, go to the **Options** section.

16   In the **DELIVERY FILENAME** text box, enter an appropriate filename variable using the information in the table below. The variable you define here determines the delivered filename.

Table 1-C:

Variable	Delivery filename behavior
%SENDER_NAME%	Delivered file name has the name of the sender
%prOriginator%	Delivered file name has the email of the sender
%prRecipientID%	Delivered file name has the job ID of message
%prDestination%	Delivered file name has the name of the home folder

17   Select a delivery format from the **DELIVERY FORMAT** drop down list.

Note	If the delivery format is set to PDF(OCR Image+Text) in MyAccuRoute tab of the Properties page of the Embedded Directive Manager component, a scan job sent to the MyAccuRoute rule specifying to 'Use Originator' option will deliver the document in OCR PDF format provided the "Allow sender to override the delivery format" option is enabled in the outbound rule.

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

XmlScan connector

The new AccuRoute server v 2.3 installation comes with the "HPOXPScan on the Server" connector. This is an XmlScan connector that is used specifically for handling jobs from the Embedded AccuRoute for HP OXP v1.0 client application. (It has an inbuilt Translation.xsl file to transform files that are scanned and delivered from HP devices into a format that is recognized by the AccuRoute server.)

Note   The "HPOXPScan on the Server" connector is installed as part of the basic AccuRoute server v2.3 installation. This connector is for use with Embedded AccuRoute for HP OXP v1.0 only.

During upgrade from a legacy AccuRoute server system, if the XmlScan connector was not previously created, the Omtool Administrator must manually create it for the Embedded AccuRoute for HP OXP client.

If your environment demands, you can add additional XmlScan connectors.

- If you are adding the XmlScan connector for Embedded AccuRoute for HP OXP client application, you do not need to provide a valid license number.
- If you are adding the XmlScan connector for any other client application, you need to provide a valid license number.

Configuration Instructions

To create additional XmlScan connector:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR** to open the server Administrator.

2   In the console tree, click **CONNECTORS > NEW > XMLSCAN CONNECTOR**.

The **Server Address** page opens.

3   Click **NEXT**.

The **Display Name** page opens.

4   Enter a descriptive name and click **NEXT**.

5   You are prompted to choose the application this connector will support.

  a   Select one of the following options:

    ‣   **SUPPORTS OXP SCANNER INTEGRATION**

    ‣   **SUPPORTS GENERIC XML FEEDS**

Note   If you selected Supports Generic XML Feeds option, enter a valid license number in the **LICENSE** text box.

6   Click **NEXT**.

You are prompted to specify the folder to scan.

7   Click **BROWSE** and select the folder to scan.

8   Click **NEXT**.

The connector is configured and added. The **Congratulations** page opens.

9   Click **FINISH**.

The new XmlScan connector is listed in the details pane.

Enhancements

The enhancements in AccuRoute v2.3 are as follows:

AccuRoute Desktop enhancements

Watch Folder prompts

The AccuRoute Desktop Watch Folders can support Embedded Directive prompts. An AccuRoute Desktop user can create an Embedded Directive and enable it to use prompts. He can then configure a Watch Folder to use that Embedded Directive. Now when a file is dropped in the Watch Folder for processing, it will trigger the AccuRoute Desktop to generate the prompts. The user must supply the required values before the document can be processed for routing.

AccuRoutePDFPrinter

On a Windows XP system, the AccuRoutePDFPrinter is installed. It uses the HP Color LaserJet print driver. Using this print driver improves the size and the quality of the PDF documents for AccuRoute Desktop significantly.

Note	When upgrading from a legacy AccuRoute server, the Xerox Walk-up Printing driver v2.0 is retained.

Important	On a Windows Vista system, the AccuRoutePDFPrinter is not available and is not supported.

Compression enhancement

Compression is now handled by the PDFEnhacer as well as the ScanSoft engine. (Previously, compression was handled by the PDFEnhancer only).

If compression is turned on, and the ScanSoft engine is involved in the format conversion, the compression is handled by the ScanSoft engine. If ScanSoft is not involved in the format conversion, the compression is handled by the PDFEnhancer. Inside the PDFEnhancer, if the input file is an image only PDF, the ScanSoft engine is used. If the input file has text as well as images, the Datalogics libraries are used.

Note	The compression user interface has been removed from the PDFEnhancer's engine property.

Conversion enhancement (TIFF to PDF conversion)

Cimmetry is no longer used for TIFF to PDF conversion. OmniPage is used which converts black and white as well as color TIFF documents reliably.

DMS connector enhancement: Open Existing Profile feature

Note   You must have a valid DMS connector to use this feature.

The method by which you can export profile information and create a default profile has been enhanced. You can now open an existing profile in addition to creating a new one. Previously, you could only create a new profile.

In the Omtool Server Administrator, when you expand the console tree and click **CONNECTORS > DMS CONNECTOR > PROPERTIES > ADVANCED**, you see the **EXPORT PROFILE INFORMATION** option listed in the **Advanced** page.

Note   If a DMS doesn't support this option, clicking on Export Profile Information launches the DMS's default profile window.

Creating a new profile

To create a new profile:

1   Click the **CREATE NEW PROFILE** option.
         The DMS **NEW/SAVE** profile page opens.

2   Fill in the required information.

3   Save the profile.

Opening an existing profile

To open an existing profile:

1   Click the **OPEN EXISTING PROFILE** option.
         The DMS **OPEN** profile page opens.

2   Select an item.

Note   If your DMS 's native UI allows selection of more than one item and you select multiple items, the Omtool server will use the first item of the returned list (The order returned is DMS specific) and ignore other selections.

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3   Click **OPEN**.

Once a profile has been selected, it can then be specified in a rule to route documents using the default profile. For information on how to create rules and for information on advanced routing options, custom properties and importing xml data, consult the [Omtool Server Administrator help](#).

DMS Library update

All the DMS Libraries have been updated to version 2008.0.0.426.

Note   Automatic validation of configuration data entered (WorkSite, iManage, DM, SharePoint, FileSurf) is now supported.

Embedded Directive Management enhancement

The page listing all Embedded Directives now has a search filter. The Administrator can use the search filter to display only those Embedded Directives that he wants to view. He can also delete an ED or change the ownership of an ED.

ExchangeX connector for Exchange 2007

Enhancements have been made to support the ExchangeX connector for Exchange 2007. For **Exchange 2007**, the Exchange server must have a Foreign Connector specified with an address type that is not SMTP (valid address types are: FAX, FAX1, MYFAX). For general information on Foreign Connector, see http://technet.microsoft.com/en-us/library/aa996779.aspx. For information on how to create a Foreign Connector, see http://technet.microsoft.com/en-us/library/aa996397.aspx. For information on "Set-ForeignConnector" cmdlet to modify an existing foreign connector, see http://technet.microsoft.com/en-us/library/bb123789.aspx.

Permissions

For Exchange 2007, permission is needed is access to the drop directory when creating the Exchange connector. For more information on the drop directory, consult Microsoft documentation in http://technet.microsoft.com/en-us/library/aa996779.aspx.

Adding ExchangeX connector

To add the Exchange 2007 connector to your AccuRoute server:

1   Start the Administrator and expand all items in the console tree if necessary.

2   Right-click **CONNECTORS > NEW > EXCHANGEX CONNECTOR**. The **License** page opens.

3   In the **License** text box, enter a valid license and click **NEXT**. The **Server Address** page opens.

4   Select the Server Address option - **RUN ON THE OMTOOL MESSAGE SERVER** and click **NEXT**. The **Display Name** page opens.

5   In the **NAME** text box, enter a friendly name for the Connector and click **NEXT**. The **Connector folder** page opens.

6   In the **SPECIFY A FOLDER TO SCAN** text box, browse and select the folder for the connector to scan and click **NEXT**. The **Lookup Connection** page opens.

      The folder you select is the drop directory specified when creating the foreign connector using the Exchange 2007 Management Shell.

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7   Verify the **HOST NAME** and **SEARCH BASE** for the lookup connection and click **NEXT**. The **Lookup Authentication** page opens.

> *Note*   The **Host Name** is the Active Directory server.

8   In the **USERNAME** and **PASSWORD** text box, enter the logon credentials associated with the lookup user account and click **NEXT**. The **Congratulations** page opens.

9   Click **FINISH**.

Image quality enhancement

The quality of the thumbnail image within the document that is attached to the delivery confirmation message has been enhanced. For information on how to add thumbnail images, consult the "Adding thumbnail image to notification message" topic in Omtool Server Administrator help.

Improved Text ED detection through Image Cleanup prior to OCRing (using OmniPage)

Enhancements have been made so that when detecting Text ED the file is always despeckled and white noise in letters are removed as best as the ScanSoft engine can do. Then recognition occurs to try and find the ED.

This has significantly increased the detection rates for scans that have substantial white noise.

> *Note*   This enhacement applies only when using text ED strings, it does not apply when using barcodes.

Job cancel enhancements

The cancellation requests in the Compose component has been enhanced to allow immediate cancellation of jobs that are sitting in queue waiting to be composed.

Additionally, OCR and Compression engines are enhanced to check for cancellation before starting the next page of their current job. Consequently, jobs that are in process of OCR/Compression can be cancelled relatively quickly.

SMTP connector enhancements

In the **Advanced SMTP Configuration** page, the **Default Address Type for SMTP received messages** section has been modified to have **E-MAIL** with **INTERPRET AS FAX DESTINATION WHEN USER IS A NUMERIC STRING E.G. 5551212@DOMAIN.COM** selected as the default.

To open the Advanced SMTP Configuration page:

1   Open the Omtool Server Administrator.

2   In the console tree, click **CONNECTORS > SMTP > PROPERTIES** to open the **General** properties page.

3   Click **ADVANCED** to open the **Advanced SMTP Configuration** page.

The list of file types watched for in the folders being monitored of inbound messages has been updated to include *.822 to allow for HP/DigitalSender drop files.

Third Party software update

The following third party software have been updated:

- Nuance OmniPage v15.2

- InLite ClearImage v5.6

- Datalogics PDF Libraries v8.1

- Artifex Ghostscript v8.62

Telco update

Support for Dialogic/Brooktrout T.38 Fax, including Board based and SR140 Host based methods has been added.

Resolved issues

The following table lists the resolves issues in AccuRoute v2.3.

Table 1-D: **Resolves Issues in AccuRoute v2.3**

Bug	Description and workaround
10825, 11558	The Omtool Server Administrator does not verify if the **Telco** connector is disabled or running when you modify the connector properties. Omtool recommends that you must verify that the Telco connector is running when making property changes. This ensures that the changes you make are propagated to the Modem Server. If you modify the connector properties when the Telco connector is disabled, and then save the changes, you see the following warning: `The telco connector does not appear to be running. Changes made to this connector will not be properly propagated to the modem server(s) until the telco connector is started.`
11096	To avoid any depreciation in document image quality of a thumbnail display, always set the image size to a value that is over 40. The default value is %PAGE1:50%.
11779	When you add or delete a component (for example, a remote Embedded Directive Manager component) you must restart the Component Manager Service.
11860	When adding a Database connector, the database administrator must configure only those columns that should be updated. Configuring all columns for update is resource intensive and continually scanning the database table for schema changes previous to each data insertion is not recommended.
12070	In **AccuRoute Desktop** client, if you are unable to configure WorkSite DMS because the WorkSite option is disabled when you click Tools > Configure DMS, uninstall other DMS clients that you are not using and then configure the WorkSite DMS.
12232	When using the **AccuRoute Desktop** client, file Sharing on Vista needs to be enabled to send attachments to the server through all views.
14500	For **WorkSite** DMS, messages using the default profile does not have the date or the time stamp appended.
14566	When converting *.PPT files, always select PowerPoint automation as the conversion engine.
14635	The Administrator must provide a valid email address in the "Originator for e-mail messages generated by server" section in the Settings tab of the Server Properties page. By default, the email value is set as `OmtoolServer`. Since this is not a valid originator email address, the AccuRoute server does not generate notification for the originator. For example, when a single use ED is used for a second or a third time, no notification is sent to the job originator informing him that he is using an already used single use ED.

Table 1-D: **Resolves Issues in AccuRoute v2.3**

Bug	Description and workaround
14703	When configuring billing, you must configure all columns as nullable or have a default value specified. When writing a billing record, if you do not have a value for that column or you are not configured to place a value into a column, the null or the default specified value is inserted in the column.
14761	If your remote AccuRoute Intelligent Device Client is installed on a non default location, the server upgrade process will install the new files in the default location and not in the non-default location.
	If you must keep the installation files on the non-default location, you must uninstall and reinstall the remote client.

Known issue

The following table lists known issues in AccuRoute v2.3.

Table 1-E: **Known Issues in AccuRoute v2.3**

Bug	Description and workaround
12268	After you uninstall Hummingbird DM v5.1.05 from a system that is also running **AccuRoute Desktop client**, you get an error when connecting to the server from the AccuRoute Desktop client. The reason you can no longer connect to the server is because during uninstallation of DM client, the DCOM services get disabled. The workaround is enable DOCM services using the following procedure: **To enable DCOM services:** 1 Open a command prompt and enter dcomcnfg to open the Component services console. 2 Expand Component services > Computer > MyComputer. 3 Right click MyComputer and select Properties from the drop down menu. 4 Click Default Properties. 5 Check the box beside Enable Distributed COM on this computer option and save your changes.

14662	Notes connector disables after upgrading to AccuRoute v2.3. This happens because when you upgrade the server, Notes executable gets disabled. The workaround is to manually register Notes executable and then enable the Notes connector.
	
	To manually register Notes executable:
	1 Login to the system running AccuRoute server v2.3 using an account that belongs to the local Administrator group.
	2 Open a command prompt.
	3 Enter one of the following commands:
	▶ If your legacy server was **AccuRoute v2.1**, enter
	`"C:\Program Files\Omtool\OmtoolServer\bin\OmConGFNotesU.exe" -regserver`
	where C: is the drive where the AccuRoute server is installed.
	▶ If your legacy server was **AccuRoute v2.2**, enter
	`"C:\Program Files\Omtool\Omtool Server\bin\OmConGFNotesU.exe" -regserver`
	where C: is the drive where the AccuRoute Server is installed.
	4 Press **ENTER**.
	5 Open the Omtool Server Administrator and enable Notes connector.

Table 1-E: **Known Issues in AccuRoute v2.3**

Bug	Description and workaround

14953	From **AccuRoute Desktop client** v2.2 / v2.2.2 that is connected to **AccuRoute server** v2.3, if you select a DMS recipient and then select the output format as either WPD (WordPerfect), XLS (Microsoft Excel) or Deliver Original format, you get the following error:
	
	`Failed to profile document.`
	
	`(0x80070002) The system cannot find the file specified`
	
	The reason you get the error is because Word Perfect and Microsoft Excel were added as output formats in AccuRoute v2.3. Since AccuRoute Desktop v2.2 or v2.2.2 are not configured to support these formats, you get the error. The workaround to this issue is to modify the Registered Users accounts for these clients so that the unsupported final formats are removed from the Desktop options or upgrade the AccuRoute Desktop client to v2.2.3 which is capable of handling these output formats.

15499	omtpl files are composed by Large Job composer even when criteria does not match.

Limitation

The following table lists the limitations in AccuRoute v2.3.

Table 1-F: **Limitations in AccuRoute v2.3**

Bug	Description and workaround
14644	In **AccuRoute Web Client**, addresses are not listed when the "Browse address book" option is selected for Outlook 2007. **Reason/Workaround to issue -** This is happening because the Exchange System Manager and Outlook 2007 are installed on the same system. Microsoft does not recommend that you install them on the same system. For more information, see http://support.microsoft.com/kb/313889/en-us. The workaround to this issue is to install the Exchange System Manager on a different system.
13669	The zip file archives to a folder that appears empty. However, the contents are visible when a third party compression software like winzip or winrar is used. This is a known issue with Windows Explorer and the workaround is to use a third party compression software like winzip or winrar.