Release Notes for AccuRoute® v3.01

Product: AccuRoute 3.01

Release date: March 2010

Version 101810 1131

© 2010 by Omtool, Ltd. All rights reserved.

The Release Notes contain information on new features, enhancements, resolutions and limitations for AccuRoute v3.01.

New features

The new features in AccuRoute v3.01 are as follows:

Note	New features are documented as new AccuRoute Server features followed by new admin features (like new connector, component or other features) and new client features.

AccuRoute Server feature

Updated server licensing - CPU core count capability

The AccuRoute Server is now hard-licensed to CPU core count (the server license has a built-in CPU core count capability). This capability will not allow you to install the server on a machine that has more core counts than the license allows. If the system has a higher CPU core count, contact Omtool Sales for a license with a higher core count and then proceed with server installation.

The standard AccuRoute license allows use of the product on a system with up to four (4) CPU cores. Anything larger than four CPU cores will need to go to an eight (8) core license. Anything larger will need a Data Center Server license. The Data Center Server license will support hardware with sixteen (16) or more CPU cores.

Important	The AccuRoute installation will not continue without the proper license. Similarly, when upgrading to AccuRoute v3.01, if the setup detects the system to have a higher core count than licensed, the upgrade will not continue. Contact Omtool Sales to purchase a license with a higher CPU core count in order to proceed with server upgrade.

Omtool Server Administrator features

Components

Image-In Queue Component

The Image-In Queue component allows the AccuRoute Server to route documents to predefined queues. The documents in the queue are managed in the Image-In™ Queue Application where they are processed by the Image-In Queue operator and sent to ObjectArchive or to other destination for storage.

The AccuRoute Server installs the Image-In Queue component by default. A purchased license number is required to enable this component. Contact Omtool Sales for more information.

To enable the Image-In Queue Component:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Double click **COMPONENTS**. The details pane lists all the components in your AccuRoute environment.

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

5   Click **ENTER LICENSE** to open the **License** page.

6   In the **LICENSE** text box, enter the valid purchased license obtained from Omtool.

7   Click **OK** to enable the component

Compose features

Additional output formats for OCR

The following output formats have been added for OCR:

- DOCX, XLSX (for Microsoft Office 2007)

Updated Compose Component (Composer) licensing - thread count capability

AccuRoute Compose Component (Composer) is now licensed to thread-count per license. This capability will not allow you to create more threads than a Composer license allows. You can split the Composer threads and configure them across any number of Composers on the server as long as the total number of threads do not exceed the licensed amount. More than one license must be used on Remote Composers.

Connectors

Omtool Healthcare Suite Connector for MEDITECH

The Omtool Healthcare Suite Connector for MEDITECH gathers patient information from MEDITECH and routes this information to the ObjectArchive database or other some other database for storage and retrieval on demand.

Patient information is usually gathered during patient registration. Information gathered includes billing, lab modules and other related information.

To add the Omtool Healthcare Suite Connector for MEDITECH:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Right click **CONNECTORS** and select **NEW ACCUROUTE® CONNECTOR FOR > MEDITECH**. The Create New connector wizard opens.

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

     To install the connector on a remote system, click the Remote server option and enter the name or IP address of the remote system in the text box beside the Remote server option.

5   In the **NAME** field, enter a descriptive name for the connector, the default being **MEDITECH on the Server**.

6   Click **NEXT** and then **FINISH** to close the wizard.

     The Omtool Healthcare Suite Connector for MEDITECH is created and listed in the Connector details pane.

Configuring Omtool Healthcare Suite Connector for MEDITECH

To configure Omtool Healthcare Suite Connector for MEDITECH:

1   Open the Omtool Healthcare Suite Connector for MEDITECH properties page and click **CONFIGURATION**.

   a   For the **DEFAULT DESTINATION** text box, verify the value to be **MEDITECH2OBJECTARCHIVE**.

   b   In the **LISTEN FOR REQUESTS FROM MEDITECH ON PORT** text box, verify the value is 3001.

2   Click Environments tab and then click **NEW** to open the Environment Properties page.

   a   In the **NAME** text box, enter a descriptive name.

   b   Verify the **TYPE** is Magic (default).

   c   In the **SERVER** text box, enter the IP address of the Meditech server.

   d   In the **PORT** text box, use default port 3000.

   e   In the **SEGMENT** text box enter appropriate value.

   f   In the **DIRECTORY** text box enter appropriate value.

   g   In the **MIS** text box enter appropriate value.

    h   In the **ADMDB** text box enter appropriate value.

3   Click **DOCTOR LOOKUP** tab. Most fields are filled in by default. Verify all information.

    a   For **Logon**: change value to domain admin

    b   For **Attribute**: value is blank by default. Enter an attribute to search on.

4   Click **OK** to save your changes and close the Properties page.

AccuRoute Connector for XML Store

The AccuRoute Connector for XML Store helps you manage and route XML documents to specific XML repositories.

To create an AccuRoute Connector for XML Store:

1   Create a shared folder and name it XML Store.

2   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR** to open the Omtool Server Administrator console.

3   Right click **Connector** and select **NEW ACCUROUTE® CONNECTOR FOR > DMS**.

4   In the **LICENSE** text box, enter the appropriate DMS connector license.

5   Click **NEXT**. The **Server Address** page opens.

6   Keep the default **RUN ON THE OMTOOL MESSAGE SERVER** option and click **NEXT**. The **Display Name** page opens.

7   In the **NAME** text box, enter an appropriate name. Click **NEXT**. The **DMS Typ**e page opens.

8   In the **CHOOSE THE DMS TYPE** drop down, select **T4 - XML STORE** option.

9   Click **NEXT** and then **FINISH**. The **XML Store configuration** page opens.

10   To select the **Output Templates**, click **NEW**. The **Output Template Properties** page opens.

11   In the **NAME** text box, enter a name.

12   In the **FOLDER** text box, browse and select the shared folder you created. For example: **\\MAGNOLIA\XMLSTORE** where **Magnolia** is the name of the AccuRoute Server.

13   In the **XSLT** text box, browse and select the xsl file included as sample with AccuRoute Server installation in **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\SAMPLES\XMLSTORE**.

14   Click **OK** to close the **Output Template Properties** page.

15   Click **FINISH** to close the **XML Store configuration** page.

The AccuRoute Connector for XML Store is now created and listed in the connector's page.

Omtool Server Administrator nodes

This section includes:

Configuration node

The Configuration node includes the following options:

- Custom Options node
- Validators node
- Properties node
- Groups node

Custom Options node

Custom Options are customized properties created by the Omtool Server Administrator for use by AccuRoute users.

The Administrator can, for example, configure image cleanup properties for the AccuRoute Server thereby reducing white noise when scanning documents. Some examples of Custom Options are image enhancement, set message priority to high, set message priority to low etc. Here is an example of setting up image enhancements as a Custom Option.

Note   Custom Options must first be added as Properties.

To configure Custom Option for ImageCleanup:

1   Start the Omtool Server Administrator.

2   Expand the **Configurations** node, and select the **Custom Options** node.

3   Right click **Custom Options** and select **NEW> CUSTOM OPTION**. The **New Custom Option** page opens.

4   In the **ID** text box, enter the ID of the property that will be mapped, for example prImageEnhancements.

5   In the **DESCRIPTION** text box, enter a brief description of the property.

6   Click **NEW** to open the **Define Property Setting** page.

7   From the **PROPERTY** drop down, select the predefined property (in this example prImageEnhancements).

8   In the **VALUE** text box, enter -1.

9   Click **OK** to close the **Define Property Setting** page.

10   Click **OK** in the **New Custom Option** page to create the Custom Option.

It is now listed in the Custom Options details pane. Now when this custom property is specified by the user, the final document will have gone through an image cleanup process.

Validators node

Validators can be setup to validate against database tables maintained within the SQL Server of any external software application.

To set up validation:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Select **CONFIGURATION** and then right click **VALIDATORS**. From the drop down menu, select **NEW > VALIDATOR**.

4   The **Select Validation Typ**e page opens. Select **ADO VALIDATOR** from the **Type** drop down list.

5   Click **OK**. The **Validation Properties** page opens.

6   In the **NAME** text box, enter the name.

7   In the **DESCRIPTION** text box, enter a brief description.

8   Verify that the **MANDATORY: USER MUST SPECIFY A VALUE** option is selected. Also that the check box beside the **USER MUST CONFIRM SUCCESSFUL VALIDATIONS** is selected.

9   Click the **ADO** option.

10   In the **DSN** text box, enter the following string: `Driver={Sql Server}; Server=[your SQL server name]; Database = [your database name]; User ID=""; Password="";`

11   In the **QUERY** text box, enter the following string: `select [name] from [name field] where [name] =%name%.`

For example, for the **Client** field, you will enter: `Select ClientFIeld from ClientTable where ClientField = %Client%` and for the **Matter** field, you will enter: `Select MatterField from MatterTable where Matterfield = %Matter%.`

12   Click **TEST** to test the validator.

13   Click **OK** to create the validator.

Properties node

The following message properties are created when you install AccuRoute v3.01.

- ApprovalData

- ApprovalEmail

- ApprovalType

- DEFICIENCYSTATUS

- DeliveredDocumentName

- DeliveredFormat

- JobIDText

- Originator

- FolderID

Additionally, you can create message properties or metadata fields as needed.

To create a message property:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Expand **CONFIGURATION** then, right click **PROPERTIES**. From the drop down menu, select **NEW > PROPERTY DICTIONARY**. The **Property Dictionary Item** page opens.

4   In the **NAME** text box, enter the metadata field name.

5   In the **LABEL** text box, enter a suitable label.

6   In the **INSTRUCTIONS** text box, enter an appropriate instruction on what information should be entered for this field. For example, for "Client" metadata field, you can create the following instruction: "Enter the Client name:".

7   Verify that the **TYPE** is set to **TEXT**.

8   In the **Mappings** section, click **NEW** to open the **Property Definition** page.

9   Select **DMS CUSTOM FIELD** option and enter the corresponding metadata field name as defined in the DMS repository.

10   Click **OK** to close the **Property Definition** page. The value you entered is listed in the **Mappings** text box. To view the complete mapping path of properties, see the [Copy to clipboard feature](#) (9).

11   Click **OK** to create the message property. It is listed in the **Properties** details pane.

12   If the property is to be validated, continue to [Validating message property](#) (8).

13   If you need to configure Regular Expression for the property, go to [Regular Expressions](#) (8)

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

Creating prompts

To create prompts:

1   Click **ITEMS** tab to open the **Items** page.

2   Click **NEW** to open the **List Items Properties** dialog.

3   In the **VALUE** text box, enter the string for the prompt.

4   Optionally, in the **INTERNAL VALUE** text box, enter the unique identifier for the prompt.

Note   The Value and Internal Value are used as default values for Text prompts and list values for List prompts.

For a Text prompt you can have prDMSDocumentName as the mapped property, and the Value can be "document.pdf."

For a List prompt, you can define prompts for document types. In this case, a sample Value and Internal Value would be: Value: PDF (image), Internal Value: PDF

---

5   Click **OK** to save your changes to the message property.

Validating message property

1   Click **VALIDATION** tab to open the **Validations** page.

2   Click **VALIDATE** and then select the **USE SERVER VALIDATION** option.

3   Next, from the drop down select the message property for which you are setting the server validation.

4   Click **OK** to save your changes to the message property.

Regular Expressions

The Regular Expressions feature is designed to detect a preset value in third party vendor barcodes (for example barcodes from Extensity or CA MDY FileSurf). The advantage of using Regular Expressions is that it allows Omtool to support third party vendor barcodes without the need for software updates.

In the following example, the configuration instructions are for expense reports generated by INFOR ™ Extensity software and routed to Omtool's ObjectArchive.

To configure Regular Expression:

1   Create a new message property. For instructions, see [Properties node](#) (6).

2   In the message Properties page (the **Property Dictionary Item** page), go to the **GENERAL** tab.

3   In the **Mappings** section, select the DMS property mapping of the property.

4   In the **Automatic Assignment (Barcode Detection Component)** section, go to the **REGULAR EXPRESSIONS** text box and enter the first few letters comprising the message property name followed by `*`.

For example, say you create a message property `ERID` for Extensity reports. In the **Mappings** section, you will then select a DMS property mapping for the ERID property. In the **REGULAR EXPRESSIONS** text box, you will enter `ER*`.

5   Create a new Volume Expenses. For instructions, see [Creating Volume List](#) (13).

6   Open the Properties page of the Volume, go to the **INDEXING** tab.

7   In the **Properties to Index** section, add the message property you created in step 1 along with other necessary message properties like JobID Text.

8   In the **Active** (default volume list), add the same message properties to **Properties to Index** section.

9   In the **Connectors** page, add a new **DMS connector** for ObjectArchive and label it **Expenses**.

10   In the **Components** page, enable the **Barcode Extractor** Component by providing a valid license obtained from Omtool.

11   In the **Outbound** rules page, create a new rule: Where Extensity documents can be specified to, route to the Expenses connector.

    a   In the **Route to connector** page, click **ADVANCED** option to open **Advanced Routing Options** page.

    b   Click **Custom Properties** and then **Custom Properties** again and then click **ADD**.

    c   In the **Custom Property** page that opens, in the **NAME** text box, add prDataExtraction. In the **VALUE** text box, enter 3.

    d   Save your changes.

Now any message generated by Extensity is detected by the preset barcode value and the message will be routed to ObjectArchive via the Expense DMS connector.

Copy to clipboard feature

To view the complete mapping path of properties, (especially for properties specified by the DMS Custom Field option) the **TO CLIPBOARD** button has been added to the **Mapping** section on the **Property Dictionary Item** page.

To open this page, expand the **CONFIGURATION > PROPERTIES** node and then click on any property on the "Property Dictionary Item" page. When you click on the **TO CLIPBOARD** button for a DMS Custom Field, it copies the OPath text of the currently selected mapping to the clipboard as UNICODE text.

Groups node

Omtool Groups are new in AccuRoute v3.01. The Omtool Server has been re-structured to allow groups to control access to many resources via Active Directory groups instead of individual Registered Users. For example, access to AccuRoute Desktop, AccuRoute Web Client, Image-In Queue are all controlled by the existing Active Directory group permissions and not registered user permissions.

The server functions that uses group access permission are:

- **AccuRoute** - determines whether the members of the group have permissions to use AccuRoute Desktop client

- **Custom Options** - determines what Custom Options the members of the group can use

- **Assignable Distribution Creator** - determines whether the members of the group can create Assignable Distributions

Note   Assignable Distribution Creator is a separately licensed product. Contact Omtool Sales for information.

- **Image-In Queue** - determines the Image-In Queue operator permissions the members of the group have

---

Note   The Image-In Queue permission **OPERATOR MUST VIEW ALL DOCUMENT PAGES BEFORE COMPLETING** is not implemented in this release.

- **Prompts** - determines what pre configured prompts the members of the group can use
- **Scan settings** - determines whether the members of the group can use and configure scan settings for a particular device or device group
- **Volume List** - determines what Volume Lists the members of the group can access
- **Queue Access**- determines which Queues the members of the group can access. It also determines which members of a group can be assigned deficiencies.
- **General**- stores the name and description of the group
- **Members** - lists the Active Directory members that make up the group

To create a new Group:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Expand **CONFIGURATION** then, right click **GROUPS > NEW**. The Group **Properties** page opens.

4   In the **NAME** text box, enter a name for the group.

5   In the Description text box, enter a brief description.

6   Click **MEMBERS** tab and then click **ADD**. The **Add Group** page opens.

7   Enter a pre defined Active Directory group and click **CHECK NAMES**.

8   Select the group from the list returned and click **OK** to close the **Add Group** page.

9   Now configure the group as necessary by defining AccuRoute, Image-In Queue, Queue Access, Custom Options, Assignable Distributions Creator, Prompts, and other functions as necessary.

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

ObjectArchive node

Omtool ObjectArchive™ provides storage and retrieval for stored data. The data can be scanned images, multimedia and other textual/non-textual data). The data is stored as individual objects with unique object keys. The object keys are 128 bit (16 bytes) Universally Unique IDs (UUID) and are the primary methods of accessing storing/retrieving) data from the archive database.

The ObjectArchive node allows management of ObjectArchive servers. The ObjectArchive database is created locally during a AccuRoute Server install. This is listed as **Active** under the ObjectArchive node of the Omtool Server Administrator. You can also connect to external ObjectArchive databases and configure Volume Lists to store scanned documents (or images).

Note   ObjectArchive is not cluster aware.

Installing ObjectArchive

Important   ObjectArchive must be installed on a system remote from AccuRoute Server. The SQL Server does not have to be the same one used for the AccuRoute Server databases.

---

1   Log in to the system where you will install ObjectArchive using an account that belongs to the AccuRoute Administrators group.

2   Insert the AccuRoute Server installation DVD into a DVD-ROM drive. Alternately, navigate to the network where you have kept the AccuRoute Server setup files.

3   Run **\MESSAGESERVER\SETUP.EXE**.

On a Windows 2003 system, .Net Framework 3.0 is installed if it is not already installed on the system.The InstallShield wizard opens and configures your system for installation and displays a welcome message.

4   Click **NEXT**. The setup shows the license agreement page.

5   Select **I ACCEPT THE TERMS OF THE LICENSE AGREEMENT**, and click **NEXT**.

The setup shows the installation options.

6   Select **CUSTOM** and click **NEXT**. The setup shows a list of AccuRoute features.

7   Select **OBJECTARCHIVE**, and other features you are installing at this time.

8   Click **NEXT**.

Note   The setup cannot continue until all requirements are installed and configured. (Double-click an item in the list for more information.) If any required components were not detected, click **CANCEL** and click **YES** to exit the setup and install the components that are required to complete the installation.

---

9   Click **NEXT** to continue the installation.

The setup requests logon credentials for the Omtool service account. The **NT Domain** and **User Name** fields are populated automatically based on the current Windows user.

10   Enter the logon credentials of the Omtool service account.

   a   In the **NT DOMAIN** text box, enter the name of the Windows domain.

   b   In the **USER NAME** text box, enter the user name.

   c   In the **PASSWORD** and **CONFIRM PASSWORD** text boxes, enter the password for the user.

   d   Click **NEXT**. The setup validates the user account and then displays options for the message database.

11   Complete the database configuration:

If the setup detects **SQL Server 2008 or 2005**, verify that the **SERVER** field is populated with the name of the server running the Microsoft SQL Server database application. Then manually add the name of the SQL instance after the server name. For example: `Servername\SQLInstanceName`. Otherwise you will get the following error: `Failed to validate SQL connection information`.

> *Note*   The default value is the local server where the setup is running.

e   In the **Database** field, review the name of the message database name and modify it if necessary.

> *Note*   During installation, the database is created on the Omtool server in **...\OMTOOL\OMTOOLSERVER\DATABASE**.

f   Select the authentication method that the Omtool services use to access the database. Choose one of the following:

  ‣ **USE WINDOWS INTEGRATED AUTHENTICATION** to use the Omtool service account. This is the default.

  ‣ **USE SQL AUTHENTICATION** to use SQL Server authentication. If you select this option, enter the logon credentials in the **User Name** and **Password** fields.

12   Click **NEXT**. The setup prompts you to choose the **ObjectArchive Workspace**.

The default is `C:\OaData`. To choose another location, click **BROWSE** and select the location.

> *Note*   This folder should always be a local drive as it maintains journals of events like network failure etc. Specifying a UNC path for the OaData folder is not supported since it could lead to data loss.

13   The setup validates the user account and then shows installation settings.

> *Note*   If other installation features are included, the setup might request additional information before displaying installation settings.

14   Review the installation settings and click **NEXT** to start the installation. The setup installs the selected component and displays a message indicating that the installation is complete.

15   Click **FINISH**.

Connecting to an external ObjectArchive database

To connect to an external ObjectArchive database:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Right click **OBJECT ARCHIVE** and select Properties from the drop down menu. The **ObjectArchive Properties** page opens.

4   Click **ADD** to open the **ObjectArchive Server Properties** page.

5   In the Server text box, enter the name of the system running the database.

6   In the **USERNAME** text box, enter the name of the person with the authority to access the above mentioned database.

7   In the **PASSWORD** text box, enter the password of the user.

8   Click **TEST CONNECTION** to verify that the connection is complete.

9   Click **OK**. The newly created connection is listed in the ObjectArchive details pane.

Creating Volume List

Any properties you specify in the newly created Volume List must also be specified in the Active Volume List.

To create a new volume list:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Right click **OBJECTARCHIVE** and select **NEW > VOLUME LIST** from the drop down menu. The **New Volume List** page opens.

4   In the **NAME** text box, enter the name **INVOICE**.

5   In the **FOLDER** text box, the path to the list is listed as by default. If you want to change the default path, make the necessary change.

Note   By default 4 GB is allocated for OaVolumes. If the space is less than 4 GB, messages will fail. You can manually configure the value to be greater or equal to 4GB.

---

6   Next, click **INDEXING** tab to open the **Indexing** page.

7   In the **Properties to Index** section, click **ADD** to open the **Index Properties** page.

8   Select from the **PROPERTY** drop box the message properties for indexing. Depending on your environment, some message properties should always be indexed.

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

10   Click **OK** to close the **New Volume List** page.

Devices node

Using the Devices node, the Omtool Server Administrator can add HP devices and install HP OXPd Device Client v1.4 into the devices.

This allows the Administrator to add and manage all devices from the Admin itself. Moreover, adding devices from the Admin MMC has simplified the steps of adding the devices. It is no longer necessary to use a web browser to install the OXPd jar file and using the Package Loader to install the jar file.

Important   The HP OXPd Device Client v1.4 must be installed on the server prior to installing and configuring the Devices node. To learn more about this device client, contact <u>Omtool Sales</u> for information.

To add an HP device:

1   Open the Omtool Server Administrator.

2   Go to the **DEVICES** node and select **DEFAULT> NEW > HP DEVICE**. The **PROPERTIES** page opens.

3   In the **NAME** text box, enter the specific name of the HP device, for example: M4345 MFP.

4   In the **DESCRIPTION** text box, enter a brief description.

5   In the **NETWORK ADDRESS** text box, enter the IP address of the device.

6   Click **DEVICE CONFIGURATION** option.

7   In the **DEVICE USERNAME** text box enter the device username that is set in EWS for device > Networking > Authorization section.

8   In the **DEVICE PASSWORD** text box, enter device password that is set in EWS for device > Networking > Authorization section.

9   Verify the information in the Source URL text box. This is pre-populated with `http://IP address of local system/OmtoolDXPWebApp`.

Note   The IP address should be the IP of the system where HPOXP is installed.

---

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

The M4345 MFP device is added to the list of devices.

Note   When you add a HP device using the device manager node, it initiates a Query action automatically. The query validates that the device added is a valid HP device and pulls in the device model information and firmware version. The updated information is reflected in the device Properties page.

To install HP OXPd Device Client v1.4 on a device using the device node:

1   Open the device properties page and verify the firmware version of device detected is correct.

2   Close the **Properties** page.

3   Right click the device and select **INSTALL** from the drop down options.

4   Verify that installation is complete and the **status** shows "`Install - Succeeded`".

5   Walk up to the device and verify that all AccuRoute features selected during Embedded AccuRoute for HP OXP install are loaded to device.

6   Use the AccuRoute features to test that they are working correctly.

Messages node

Device metadata is now available for messages

On the Job Properties page, the information in the pre-existing **Recipient** and **Sender** tabs are now integrated into one simpler tab labeled Template.

The **Template** tab lists such information as the coverpage chosen (or "(No coverpage specified)") along with a list view of all the template variables for the job, including any Device Meta Data tags.

By introducing the Template tab, the UI has been simplified as it readily shows previously hidden and difficult to find otherwise, template variables that are set on a job.

The list view is sortable by Name/Value in ascending or descending. The default sorting is ascending by Name.

Message search capability

A right click search functionality has been added to the **In Progress** and **History** folder of the **Messages** node of the Omtool Server Administrator. Using this capability, you can now search for messages by specifying a criteria.

To search for messages by specifying criteria:

1   From the **Messages** node, right click **MESSAGE** and select **SEARCH** from the drop down menu.

2   To find messages in **In Process** folder, right click **IN PROCESS** and select **SEARCH** from the drop down menu.

3   To find messages in **History** folder, right click **HISTORY** and select **SEARCH** from the drop down menu.

Queues node

AccuRoute Server Queues are related to the use of the Image-In Queue desktop clients in processing scan jobs. The Omtool Server Administrator can create queues so that the Image-In Queue operator can digitally manage the scanned documents, assign document deficiencies, process vendor invoices or other documents and route documents according to queue workflows.

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

AccuRoute Queues have:

- default destination
- required properties
- data driven workflows

To create a Queue:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Right click **QUEUES** and select **NEW > QUEUE**. The **QUEUE PROPERTIES** page opens.

4   In the **NAME** field, enter a descriptive name for the Queue, for example Invoice.

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

6   Click **DESTINATION** to open the Destination page.

   a   Select **ROUTE TO** option and from the drop down list, select **OBJECTARCHIVE VIA [OBJECT ARCHIVE DMS CONNECTOR NAME]** option.

   b   Click **CONFIGURE** to open the **Profile into ObjectArchive** page.

   c   Leave the **FROM** drop down empty. Click **OK** to close the page.

   d   Verify the box beside the **INCLUDE TEMPLATE** option is checked and that the template selected is **OMNOTIFICATION-IIQ-RS.OMTPL** file.

   e   Check the box beside **ADD MODIFICATION HISTORY PAGE** and select the **DEFAULTMODIFICATIONHISTORY.omptl** file.

7   Click the **PROPERTIES** tab to open Queue property page.

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

   b   From the **PROPERTY** drop down select a property.

   c   Check the box beside Include in **Meta-Data Deficiencies** option as needed. (This should be checked if Web users are to see the meta-data properties from the AccuRoute Web Client.)

   d   Click **OK** to close the **Required Meta-Data Properties** page. The property is now listed in the **Specify the required properties for this queue** section

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

   f   Select properties to display in the Image-in Queue client.

   g   Click **OK**. The property is now listed in the **Specify the properties to display in listings for this queue** section.

8   Click **IMAGE-IN QUEUE** to open the **Image-In Queue** page.

9   To customize or change any folder name in Image-In Queue, select the folder from the **Folder Display Name** section (for example E-signature pending folder) and click **CHANGE**. A dialog opens displaying the display name text box.

10   In the **DISPLAY NAME** text box, enter the new name to display.

11   Click **OK** to close the **E-signature Pending Folder** page.

12   Click **WORKFLOW** tab to open the **Workflow** page.

13   Create workflow rules following instructions in [Configuring Queue workflow rules](#).

14   Click **OK** to create the Queue.

Configuring Queue workflow rules

The queue workflow is a series of destinations that a scanned invoice makes while it is in the Image-In Queue process. This process is managed within the Image-In Queue client, but still gives users the option of adding specific data to the invoice to ensure that the correct values are associated with the proper invoice.

Configure the workflow per the needs of your electronic document workflows. Use the example below as guideline when creating your Queue workflow.

Workflow rule

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

2 In the **DESCRIPTION** text box, enter **MANUAL RELEASE**.

3 Click **ADD** beside the **Criteria** text box, to open the **Add Workflow Criteria** page.

4 Select **RELEASED BY THE IMAGE-IN QUEUE OPERATOR**.

5 Click **NEXT**.

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

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

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

9 In the **Action** area, select **AUTOMATICALLY ROUTE**. Selecting this option will route the documents to the Queue's default destination.

10 Click **NEXT** and then click **FINISH**. Configuring the rule is complete.

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

12 Click **FINISH**. Configuring the rule is complete.

Omtool Client features

AccuRoute® Web Client

AccuRoute Web Client v3.01 has new features and enhancements including a new web archive search capability allowing the AccuRoute Web Client user to perform sophisticated searches against configured ObjectArchive Volumes.

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.

Image-in™ Acquisition Client

The Image-In Acquisition Client v3.01 has been enhanced for use in the non health care vertical environment. For more information, see Image-In Acquisition client Installation and User Guide.

Image-In™ Queue

Image-In Queue v3.01 has new features and enhancements for use in the non health care vertical environment. For more information, see the Release Notes section of the Image-In Queue Install Guide and the Image-In Queue Online Help.

Omtool DMS Libraries

Omtool DMS Libraries v3.01 has been qualified with Autonomy iManage WorkSite v8.5.

Enhancements

The enhancements in AccuRoute v3.01 are as follows:

AccuRoute Server enhancements

Microsoft® Exchange enhancement

Microsoft Exchange 2010 has been qualified with AccuRoute v3.01.

Microsoft Office enhancement

Microsoft Office 2010 has been qualified with AccuRoute v3.01.

Microsoft SharePoint® enhancement

Microsoft SharePoint 2010 has been qualified with AccuRoute v3.01.

Third Party software update

The following third party software have been updated:

- Nuance's OmniPage® v16.1
- Adobe® PDF Library v8.1.0PlusP3r
- ClearImage Tools v5.7.2
- GhostScript v8.63

Vendor path enhancement

AccuRoute vendor paths have been updated as shown in the table below.

Table 1-A: **Vendor paths**

Vendor	Updated path
Adobe PDF Library (Datalogics Interface)	\\Common Files\Omtool\Datalogics\APDFL\Bin
GhostScript	\\Omtool Server\Vendors\Artifex\GhostScript\Bin
ClearImage Tools	\\Omtool Server\Vendors\InliteResearch\ClearImage\Bin
Nuance	\\Omtool Server\Vendors\Nuance\CaptureSDK\Bin

In addition to the updated paths, the **DATALOGICS** logical in the registry is point to the new Datalogics path.

Iron Mountain Accutrac® API added to Server Tools folder

The `OMTool_AccutracXE Integration Setup v1.3 Build 78.msi` **was added to the** **\\OMTOOL\OMTOOL SERVER\TOOLSACCUTRACAPI** folder for the AccuRoute v3.01 release.

Note	Subsequent to the release, AccuTrac XE v1.3 build 79 has been qualified. This is available for download in the Downloads section of the <u>Omtool Support</u> web page.

Omtool Server Administrator enhancements

Component enhancements

AccuRoute® Barcode Data Extractor changes

The AccuRoute Barcode Data Extractor has been enhanced to attempt Property matching (via Regular Expressions).

This component allows the AccuRoute Server to read and process barcodes and identify values in document pages that are scanned. It then makes these information available to destination connector for use. The destination connector decodes the information and then routes and indexes the scanned document in the specified target repository.

The AccuRoute Server installs the AccuRoute Barcode Data 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.

Connector enhancements

DMS Library update

All the DMS Libraries have been updated to version 2009.1.0.265.

DMS Libraries enhancement for Autonomy iManage WorkSite DMS provider

The Administrator of the Autonomy iManage WorkSite document management system can designate chosen profiled documents as records. These records cannot be modified or deleted and appear with a lock icon in the DeskSite or FileSite workspace. In short, once a document is designated as a record, it is preserved forever.

The Omtool Server Administrator when configuring the AccuRoute Connector for DMS WorkSite now has the ability to specify whether the AccuRoute workspace environment should integrate with the Autonomy Records Manager or not. If the Administrator specifies integration, he can indicate either of the options:

- the profiled documents from an AccuRoute Desktop application should automatically be marked as a record
- the user should be prompted in AccuRoute Desktop to specify whether the profiled document is a record or not

For configuration instructions, see the Omtool DMS Libraries Installation and Integration Guide for Autonomy iManage WorkSite.

Open Text LegalKEY® v4.2.0 barcode update

This update allows the AccuRoute Server to read and process Document Image Separator pages generated by the Open Text LegalKEY Attorney Desktop client. Document Image Separator pages are LegalKEY Native Routing Sheet pages. They provide an alternate way for the AccuRoute Server to route documents to the Open Text LegalKEY repository without using the AccuRoute Routing Sheets.

For more information, see http://www.omtool.com/documentation/DMSLibraries/v23/LegalKEY/
LegalKEYUpdateforAccuRouteV23InstallGuide.pdf.

Litigation Support Interfaces enhancements

The Litigation Support connector has been enhanced to for use with AccuRoute v3.01 server and the following:

- CT Summation
- FTI® Ringtail™
- LexisNexis® Concordance®

For information on the CT Summation integration, see Litigation Support connector installation and integration guide for Summation.

For information on LexisNexis Concordance integration, see Litigation Support connector installation and integration guide for Concordance.

For information on FTI Ringtail integration, see Litigation Support connector installation and integration guide for Ringtail.

Modem Server v2.03 Service Pack

The Modem Server v2.03 Service Pack has mane enhancements and is qualified with Dialogic's v6.1.0 64 bit. For more information, see Modem Server v2.03 Service Pack readme.

For information on installing drivers, see Dialogic modem driver installation and configuration guide.

Microsoft® SharePoint® 2007 Update

This update includes fixes related to sub-site navigation issues and metadata/custom field viewing and profiling issues for SharePoint 2007. Applying the update will modify the files on the AccuRoute Server as well as the setup files within the AccuRoute Desktop install directory. For instructions on downloading and installing the update, see SharePoint 2007 update for AccuRoute Server readme.

Telco T.37 (Fax) Connector Update

The Telco T.37 (Fax) Connector Update uses Simple Mail Transport Protocol (SMTP) to generate fax messages conforming to the T.37 protocol. It allows you send outbound fax messages as an email to another fax server or fax service provider that accepts T.37 SMTP messages. For more information, see the Omtool Server Administrator Help.

HP TRIM Update

The latest Omtool DMS Libraries are qualified for use with HP TRIM Context v6.2.2 giving you the ability to route both soft copy and hard copy documents to TRIM Context quickly and easily.

For more information, see Omtool DMS Libraries v2.3 installation and integration guide for TRIM Context®.

Omtool Client enhancements

AccuRoute® Desktop Client

Permissions changes

The AccuRoute Desktop v3.01 login is controlled by Group access permission rather than individual registered user access permission. Prompts configuration, Custom Options configuration, and scan settings are all now read from group configuration.

Note	If an AccuRoute Desktop client is connected to an older server, it will use the registered users for authentication and configuration.

AccuRoute® Legal Option Pack for (Autonomy or Open Text)

AccuRoute Legal Option Pack has been enhanced for use with AccuRoute v3.01 server and clients and with later AccuRoute versions. The enhanced LOP has the ability to auto populate billing fields when right clicking from supported DMS clients.

Note	At the time of release, Open Text Document Management (formerly Hummingbird DM) did not support 64bit environments. The work around is to install a Remote DMS Connector and Remote AccuRoute Administrator for setup and configuration of this dms.

For more information, see http://www.omtool.com/documentation/AccuRoute/v23/LOP/ LegalOptionPackInstallGuide.pdf.

Fax Center

Imaging v4.0 viewer application must be installed prior to installing Fax Center. This application is available as a download on the Omtool Support download site under **Accessories**.

Contact Customer Service to obtain the login to download and install Imaging v4.0. Then install Fax Center and configure it as necessary.

Resolved issues

The following table lists the resolved issues in AccuRoute v3.01.

Table 1-B: **Resolves Issues in AccuRoute v3.01**

Bug	Description and workaround
15240	If a job times out and needs to be resent, regardless of the availability of a Large Job Composer, the job will be processed by a normal Composer. If the time limit specified for the normal composer exceeds, the job will be sent to the Large Job Composer for processing. **Note: If the Composer option OVERRIDE TIMEOUT, SET ALL CONVERSION TIME OUTS TO: option is enabled and a time out period is specified, the timeout selection in the Engines tab Composer component is overridden.**
16599	Job fails with the reason `"Telco: Message Failed - No Data Found (Tiff attachment was invalid or blank.)"` when message is sent from Genifax Send Form with message body having only one line with no terminating RETURN/ENTER. This issue exists only when RTF mail format is used to send message from Genifax Send Form with message body having only one line with no terminating RETURN/ENTER. The workaround is to use a mail format like HTML instead of RTF. The other workaround is to press return at the end of the entered text or supply more than one line of text.
16915	If you are using AccuRoute Desktop v2.2.3 connected to AccuRoute v3.01 Server, do not enable/select the final forms of DOCX and XLSX in the Routing Destination Properties dialog in the Registered Users node since AccuRoute Desktop v2.2.3 does not support these final forms.
16824	When connecting AccuRoute Desktop v2.2.3 to an AccuRoute v3.01 Server via the HTTP connection, if you try to save the Embedded Directive with attachment, you see the following error: `Failed to save the Embedded Directive properties. (0x80070002) The system cannot find the file specified.` When you click on **SEND**, you see the following error: `(0x80070002) The system cannot find the file specified` **Note: The issue is not observed when using DCOM connection.** The workaround is to connect the AccuRoute Desktop v2.2.3 via the DCOM connection method or upgrade to AccuRoute Desktop v3.01.
17236	Embedded Directive Manager takes a long time to process directives. The first thing that the Embedded Directive Manager does is find and handle all Job Separator pages even for jobs that specify an Embedded Directive. That is why the documents are automatically scanned for barcodes even when an Embedded Directive is specified.
17633	PPT and PPTX conversion requires Microsoft Office 2010 full installation.

Known issue

The following table lists known issues in AccuRoute v3.01.

Table 1-C: **Known Issues in AccuRoute v3.01**

Bug	Description and workaround
16492	At the time of release, Open Text Document Management (formerly Hummingbird DM), Accutrac XE and CA MDY FileSurf did not support 64bit environments. The work around is to install a Remote DMS Connector and Remote AccuRoute Administrator for setup and configuration of this DMS.
16705	When using AccuRoute Desktop v3.01 connected to AccuRoute Server running on a Windows 2008 64 bit system, Batch-Standard or Standard Routing Sheet compose fails with the error: `Failed to compose Routing Sheet to PDF.(0x80e00325) Unknown error 0x80E00325` This is related to a Microsoft Office internal issue. The workaround is to create the folder **"desktop"** in the path WINDOWS$FOLDER]\syswow64\config\systemprofile\desktop, for example in **C:\WINDOWS\SYSWOW64\CONFIG\SYSTEMPROFILE\DESKTOP**. This desktop folder does not exist on Windows 2008 64 systems by default thereby causing Office automation to fail in unexpected ways. For more information, see http://social.msdn.microsoft.com/Forums/en-US/innovateonoffice/thread/b81a3c4e-62db-488b-af06-44421818ef91?prof=required.
17291	Lock icon is not shown for messages routed from FaxCenter to Autonomy iManage WorkSite even when the option is set in DMS configuration.
17308	Print jobs fail when UPD drivers are configured for printer. The workaround is to set compression level to normal if using the UPD drivers for printing.
17725	Custom fields are not displayed in AccuRoute Desktop when adding SharePoint profile. The workaround is to apply the available patch. This which will allow you to set values in custom options in Microsoft SharePoint 2010. (Contact Customer Support for patch).

Limitation

The following table lists the limitations in AccuRoute v3.01.

Table 1-D: **Limitations in AccuRoute v3.01**

Bug	Description and workaround
16794	Unable to add Exchange 2003 System Manager Tools in Windows 2008 64 bit server.
	The reason being Exchange Server 2003 does not run on 64 bit systems. Omtool has qualified this environment with the Exchange 2003 connector running remotely on a 32bit system within the environment.
	Therefore, if you are installing the AccuRoute server on a Windows 2003/2008 64 bit system, you must first install and configure the Exchange 2003 System Manager on a remote 32 bit system.
16864	The IIQ permission **OPERATOR MUST VIEW ALL DOCUMENT PAGES BEFORE COMPLETING** is not implemented in this release.