
Omtool DMS Libraries Installation and Integration Guide for Open Text Document Management, eDOCS Edition (eDOCS DM)

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Section 1: Introduction

This guide contains instructions on deploying Omtool DMS Libraries v4.0 for Open Text Document Management, eDOCS Edition (eDOCS DM). It is written for systems administrators with detailed knowledge of the Omtool Server and Open Text Document Management, eDOCS Edition (eDOCS DM).

This section includes:

[Omtool DMS Libraries integration with Open Text Document Management, eDOCS Edition \(eDOCS DM\)](#) (I-1)

[Installation components](#) (I-1)

[Deployment summary](#) (I-2)

[Release notes](#) (I-2)

[Related AccuRoute 4.0 documentation](#) (I-3)

Omtool DMS Libraries integration with Open Text Document Management, eDOCS Edition (eDOCS DM)

Omtool DMS Libraries v4.0 includes the ability to integrate with Open Text Document Management, eDOCS Edition (eDOCS DM).

Using Omtool DMS Libraries v4.0, you can be sure all of your important documents are stored in Open Text Document Management, eDOCS Edition (eDOCS DM). The combined power of AccuRoute Desktop and Omtool DMS Libraries v4.0 for Open Text Document Management, eDOCS Edition (eDOCS DM) allows your users to send both soft copy and hard copy documents to Open Text Document Management, eDOCS Edition (eDOCS DM) quickly and easily.

Best of all, there is no learning curve for your users—Omtool DMS Libraries v4.0 for Open Text Document Management, eDOCS Edition (eDOCS DM) uses Open Text Document Management, eDOCS Edition (eDOCS DM)'s native windows and are totally familiar to your users.

For more information on profiling documents to Open Text Document Management, eDOCS Edition (eDOCS DM), go to [Section 8: Testing](#) (8-1)

Installation components

Omtool DMS Libraries v4.0 is included in the AccuRoute v4.0 installation.

Note The instructions in this guide are applicable only if you are running Omtool DMS Libraries v4.0.

Deployment summary

To deploy Omtool DMS Libraries v4.0 for Open Text Document Management, eDOCS Edition (eDOCS DM):

- 1 Review the requirements and make sure you fulfil the necessary requirements. (Go to [Section 2: Requirements](#).)
- 1 Complete the installation requirements. (Go to [Section 3: Installation](#).)
- 2 Complete the required server configuration. (Go to [Section 4: Required Server Configuration](#).)
- 3 Complete any optional server configuration. (Go to [Section 5: Optional server configuration](#).)
- 4 Complete the client configuration. (Go to [Section 6: Client Configuration](#).)
- 5 Complete any optional billing configuration. [Optional Billing Configuration](#) (7-1)
- 6 Test profiling a document into Open Text Document Management, eDOCS Edition (eDOCS DM). (Go to [Section 8: Testing](#).)
- 7 Troubleshoot the installation. (Go to [Section 9: Troubleshooting](#).)

Release notes

Enhancements

Omtool DMS Libraries v4.0 for Open Text Document Management, eDOCS Edition (eDOCS DM) includes the following enhancements:

Omtool DMS Libraries v4.0 for Open Text Document Management, eDOCS Edition (eDOCS DM) has been qualified with AccuRoute Desktop v4.0.

Resolutions

Omtool DMS Libraries v4.0 for Open Text Document Management, eDOCS Edition (eDOCS DM) includes the following resolved issues:

- Hummingbird DM Version 5.01.05 SR4 MR4 is now supported. Ref. A5680
- Using Billing Provider, you can now validate billing from any database that contains an ADO connection. See Knowledge Base article K02977. Ref. A5181
- Automatic Billing Entry pulls the billing information you enter on the DMS profile screen and automatically populates the billing fields on the AccuRoute Desktop Embedded Directive, as long as the fields are empty. See Knowledge Base article K02697. Ref. A4815
- Confirmation e-mails sent from the AccuRoute server can now include a Document Link to the document stored in the DMS. Clicking the link opens the document stored in the DMS as instructed by the AccuRoute Routing Sheet. See Knowledge Base article K02980. Ref. A5184

- Changing the label of a document type is now available. See Knowledge Base article K02284. Ref. A4022
- DM.exe process was hanging in the Task Manager, which prevented functionality in the AccuRoute Client. See Knowledge Base article K03007. Ref. A5215
- When the Open Text Document Management, eDOCS Edition (eDOCS DM) client was using Windows authentication, the first use of a Routing Sheet with a destination of DM scanned successfully, but any subsequent scans failed with an error: An internal consistency check has failed. See Knowledge Base Articles K03794 and K03795. (Go to [Omtool support and sales](#) on the inside front cover.) Ref. A7520, A7588
- While saving an Embedded Directive in Open Text Document Management, eDOCS Edition (eDOCS DM), users were prompted for the validation server library. See Knowledge Base Article K03797. (Go to [Omtool support and sales](#) on the inside front cover.) Ref. A7454
- AccuRoute Desktop was not deleting temporary files called “stub documents” from some DMS applications. This issue impacted DMS applications that do not require AccuRoute Desktop to create a stub document before routing the document to the DMS application. See Knowledge Base Article K03805. Ref. A7587
- Updated Omtool DMS Library files were not included in the AccuRoute Desktop installation directory. As a result, files had to be manually installed on every workstation. Ref. A8264
- The OmtoolStub document name was not configurable. See Knowledge Base Article K03746. Ref. A7058

Limitations

Omtool DMS Libraries v4.0 for Open Text Document Management, eDOCS Edition (eDOCS DM) includes no known limitations.

Related AccuRoute 4.0 documentation

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

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

Section 2: Requirements

This section includes:

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

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

[Supported Open Text Document Management, eDOCS Edition \(eDOCS DM\) versions](#) (2-5)

Server requirements

The system where you install the DMS connector for DM must meet the following minimum requirements:

- ❑ AccuRoute v4.0

Note Currently, the Omtool DMS Libraries v4.0 are only available with the AccuRoute v4.0 server and client installations. The Omtool DMS Librariesv4.0 will be available as a separate download in the future.

- ❑ The DM client software, including the shell extensions **Windows Explorer DM Extension** and **Windows Desktop DM Extension**, must be installed on the Omtool Server.

Important You should not open or use the DM client software on the AccuRoute Server system.

- ❑ The DM client software installed on the AccuRoute Server must not integrate with Microsoft Word.

Note Do not install **Interceptor** on a system where you plan to install the Omtool DMS Libraries. **Interceptor**, an optional component of the Open Text Document Management, eDOCS Edition (eDOCS DM) client installation, is not supported with the Omtool DMS Libraries.

- ❑ DMS connector license

Note The DMS connector license must be added to the server prior to adding the connector. The AccuRoute server makes one connector available by default. Check the licensing properties on your server for connector availability.

For more information about license activation, continue to [Automatic license activation](#) (2-2).

Entering a license for DM

Note DM requires a license. For more information, contact Omtool Sales.

You can activate the DM license in one of two ways:

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

Automatic license activation

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

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 Expand the tree view and select the server name.
- 3 Right-click and select the **Licensing** option. The **Licensing** page is displayed.
- 4 Click the **Activate License...** button. The **License Activation** page is displayed.
- 5 Select the **Automatically activate via the Internet** option.
- 6 Enter your license activation code in the **Activation Code** text field.
- 7 Click **OK**. The server is updated with your license.
- 8 Click **Close** to complete the procedure.

Manual license activation

Have available a copy of the activation code.

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

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 Expand the tree view and select the server name.
- 3 Right-click and select the **Licensing** option. The **Licensing** page is displayed.
- 4 Click the **Activate License...** button. The **License Activation** page is displayed.
- 5 Select the **Export activation file for manual activation** option.

- 6 Create an Export license file:
 - a Browse to a location where you want to save the license file. By default, the file is an Export file named `ManualActivation.exp`. After specifying the file name and location, click **Save**.
 - b The path will appear in the **Export Filename** field on the **License Activation** page. Click **OK**.
- 7 From a system with internet access, launch the web browser and go to:
<https://license.omtool.com/accuroute>
The **Manual Licensing Portal** page opens.



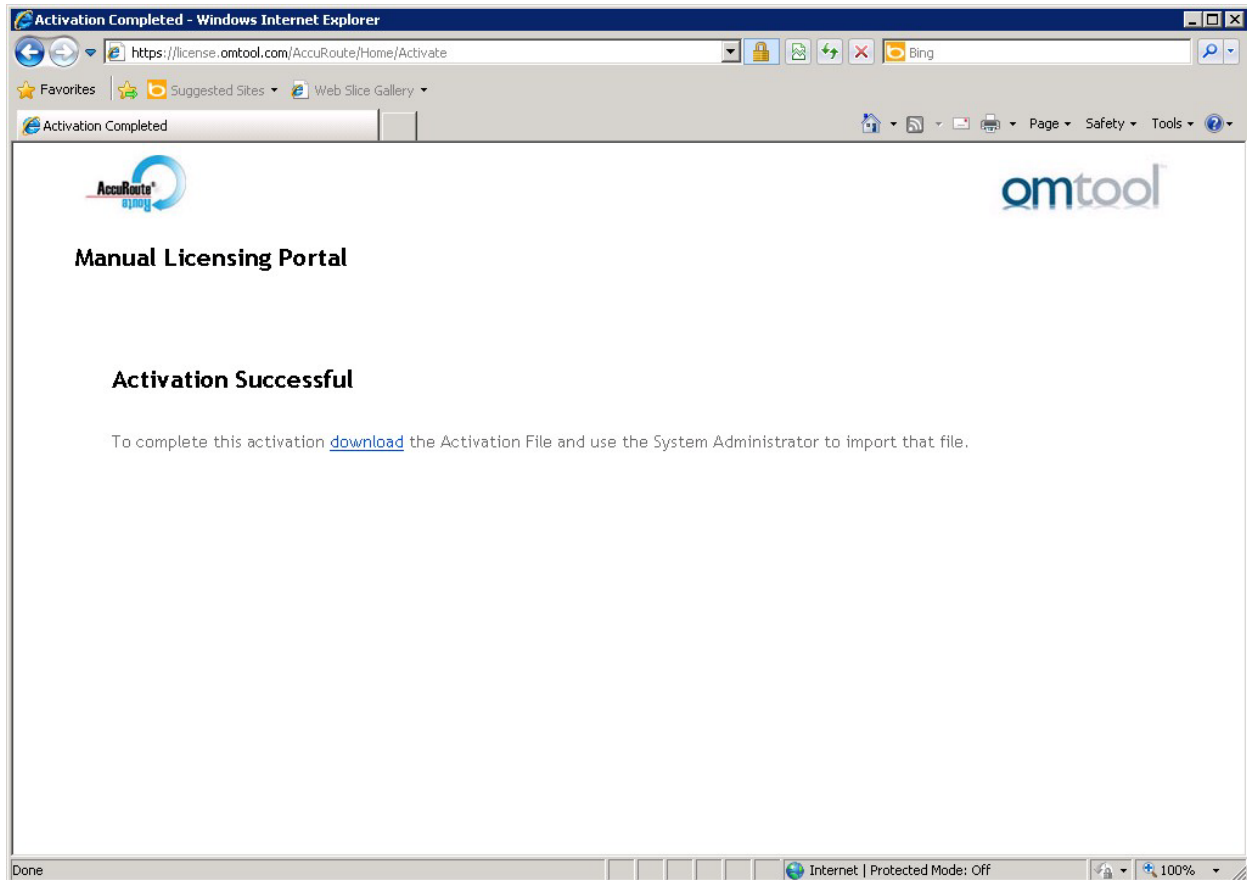
Manual Licensing Portal

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

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

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

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



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

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

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

16 Click **Close**.

Note You can minimize or close the browser.

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

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

19 Browse to the saved [ManualActivation.imp](#) file. Select the file and click **Open**.

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

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

Client requirements

The system where you install Omtool DMS Libraries must meet the following minimum requirements:

- AccuRoute Desktop v4.0
- The DM client software, including the shell extensions **Windows Explorer DM Extension** and **Windows Desktop DM Extension**, must be installed on all client workstations
 - FaxCenter v4.0

Supported Open Text Document Management, eDOCS Edition (eDOCS DM) versions

- Open Text Document Management, eDOCS Edition (eDOCS DM) v6.x, v5.1/v5.1.0.5 SR5

Section 3: Installation

This section includes:

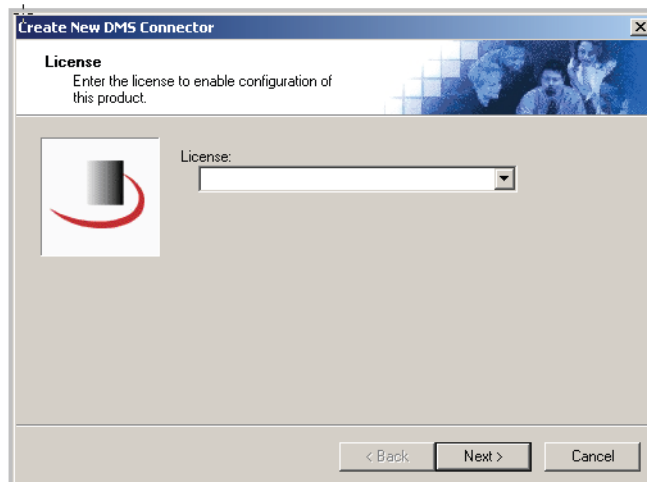
[Adding the AccuRoute Connector for Open Text Document Management, eDOCS Edition \(eDOCS DM\) \(3-1\)](#)

[Completing the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\) Configuration Wizard \(3-3\)](#)

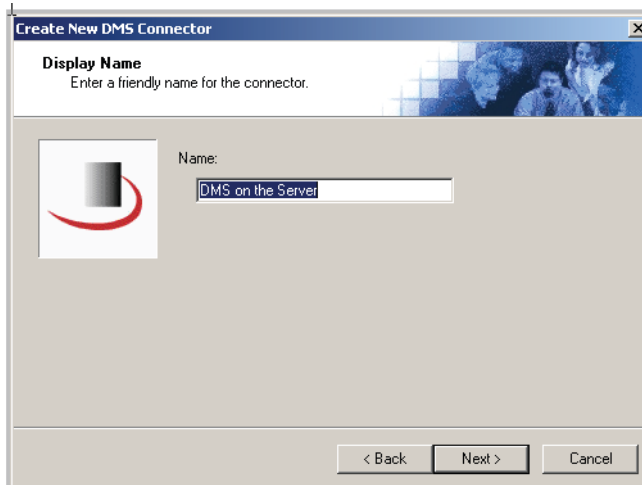
Adding the AccuRoute Connector for Open Text Document Management, eDOCS Edition (eDOCS DM)

To add the **AccuRoute Connector for Open Text Document Management, eDOCS Edition (eDOCS DM)** to an **AccuRoute Server**:

- 1 Right-click **Connectors** in the console tree and select **New AccuRoute Server connector for > DMS**. The **Server Address** page appears.

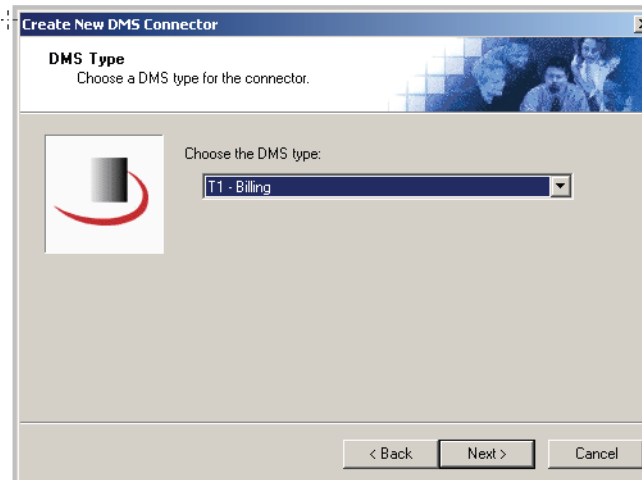


- 2 Select the server address to which you want this connector installed. Choose **Run on the Message Server** or **Remote Server**. If you selected **Remote Server**, enter the name of the server.



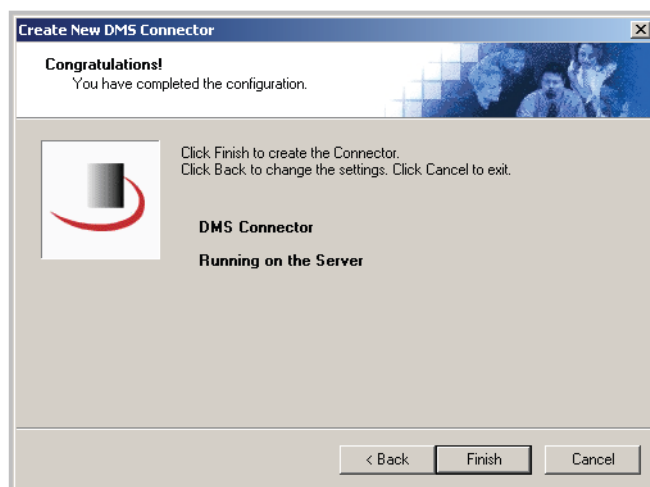
The screenshot shows a dialog box titled "Create New DMS Connector". The main heading is "Display Name" with the instruction "Enter a friendly name for the connector." Below this is a logo consisting of a grey square and a red curved line. To the right of the logo is a text input field labeled "Name:" containing the text "DMS on the Server". At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

- 3 Click **Next**. The **Display Name** page appears



The screenshot shows the same dialog box titled "Create New DMS Connector", but now on the "DMS Type" page. The instruction is "Choose a DMS type for the connector." Below the logo is a dropdown menu labeled "Choose the DMS type:" with "T1 - Billing" selected. At the bottom are three buttons: "< Back", "Next >", and "Cancel".

- DMS on the Server** appears as the default name. Type a friendly name for this connector in the **Name** text box and click **Next**.



- The **Congratulations** page appears. Click **Finish**.

The **DMS Configuration** wizard launches and prompts you to configure the connector to support Open Text Document Management, eDOCS Edition (eDOCS DM).

Continue to [Completing the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\) Configuration Wizard](#).

Completing the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM) Configuration Wizard

[All Omtool applications on the same system share the Omtool DMS Libraries configuration](#) (3-4)

[Configuring a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\)](#) (3-4)

[Configuring an existing AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\)](#) (3-6)

FaxCenter supports only one DMS application: FaxCenter can support only one DMS application, even though other Omtool applications such as AccuRoute Desktop and Swiftwriter can support multiple DMS applications concurrently.

All Omtool applications on the same system share the Omtool DMS Libraries configuration

When multiple Omtool applications are installed on the same system, these applications share the same DMS configuration data. If you make changes to the DMS configuration settings for one Omtool application, those changes affect all Omtool applications installed on the system.

Configuring a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM)

The **Hummingbird DM Login Configuration** window opens immediately after you complete the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM).

Figure 3-A: Hummingbird DM Login Configuration window

Select your authentication method on this window.

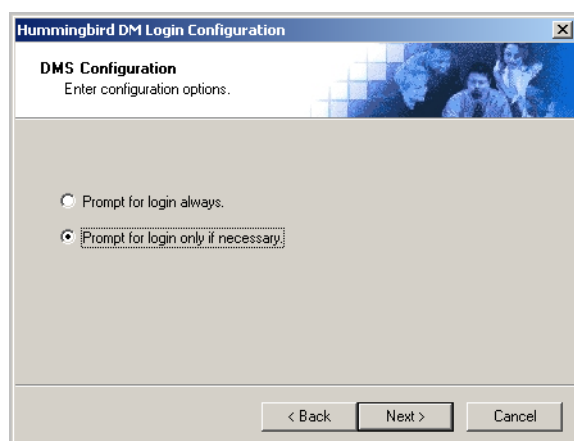
To complete the configuration wizard for a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM):

- I Select an authentication option:
 - ▶ **Prompt for DM login or use Windows Authentication** - Select this option if the Open Text Document Management, eDOCS Edition (eDOCS DM) server should prompt the Omtool user for Open Text Document Management, eDOCS Edition (eDOCS DM) login credentials or accept the current user's Windows login credentials. (When Windows authentication is enabled on the Open Text Document Management, eDOCS Edition (eDOCS DM) server and this option is selected, the Open Text Document Management, eDOCS Edition (eDOCS DM) server accepts the current user's Windows login credentials automatically.)
 - ▶ **Always use these Open Text Document Management, eDOCS Edition (eDOCS DM) credentials** - Select this option to connect to the Open Text Document Management, eDOCS Edition (eDOCS DM) server using specific login credentials. **Network name** is optional unless you are using a NetWare Server. If you are using a NetWare Server, enter the name of the NetWare Server in this text box. Enter the user name and password in the **User name**, **Password**, and **Confirm password** text boxes.

If you are configuring the DMS connector on an AccuRoute Server and the Open Text Document Management, eDOCS Edition (eDOCS DM) server has been configured to accept Windows authentication, you must select the **Always use these DM credentials** option and provide the login credentials for a Open Text Document Management, eDOCS Edition (eDOCS DM) account that can access all libraries and update all documents. (When the Open Text Document Management, eDOCS Edition (eDOCS DM) server has been configured to use Windows authentication, the AccuRoute Server cannot obtain the user's DM login credentials or Windows login credentials.) This type of global access is required because the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM), logged in as a Open Text Document Management, eDOCS Edition (eDOCS DM) user, must be able to locate the stub document (the stub document is a temporary document or placeholder for the document that is being routed to Open Text Document Management, eDOCS Edition (eDOCS DM)) and update it with the actual document being routed to Open Text Document Management, eDOCS Edition (eDOCS DM).

If the Open Text Document Management, eDOCS Edition (eDOCS DM) server does not accept Windows authentication, Omtool strongly recommends that you provide the login credentials of a Open Text Document Management, eDOCS Edition (eDOCS DM) administrator or a Open Text Document Management, eDOCS Edition (eDOCS DM) user with administrative permissions. In rare circumstances when the AccuRoute Server cannot obtain the Open Text Document Management, eDOCS Edition (eDOCS DM) login credentials of the AccuRoute Desktop user, the AccuRoute Server presents these login credentials to Open Text Document Management, eDOCS Edition (eDOCS DM). This reduces the possibility of an authentication failure.

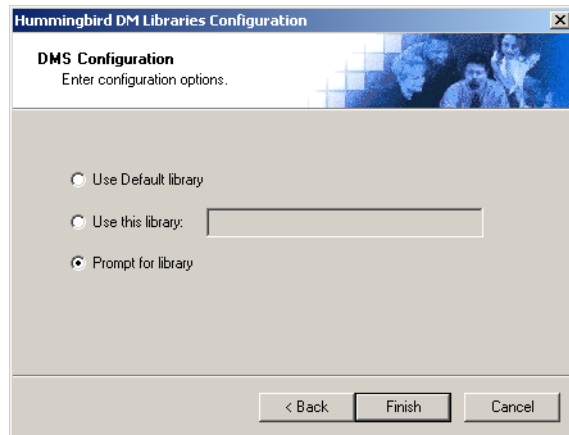
- 2 Click **Next**. The Hummingbird Open Text Document Management, eDOCS Edition (eDOCS DM) **Login Configuration** window opens.



- 3 Select an authentication option and then click **Next**.
 - ▶ **Prompt for login always** - Select this option if the Open Text Document Management, eDOCS Edition (eDOCS DM) server should always prompt the Omtool user for Open Text Document Management, eDOCS Edition (eDOCS DM) login credentials.
 - ▶ **Prompt for login only if necessary** - Select this option if the Open Text Document Management, eDOCS Edition (eDOCS DM) server should prompt the Omtool user for Open Text Document Management, eDOCS Edition (eDOCS DM) login credentials only when necessary.

If you are configuring the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM) on an AccuRoute Server, the option you select has no impact on document routing. When routing documents on behalf of an AccuRoute Desktop user, the server uses the DMS configuration data from the workstation where the user generated the Routing Sheet.

- 4 Click **Next**. The **Hummingbird DM Libraries Configuration** window opens.



- 5 Specify the Open Text Document Management, eDOCS Edition (eDOCS DM) library where the Omtool user should save documents:
 - ▶ **Use Default library** - Select this option to save documents to the Open Text Document Management, eDOCS Edition (eDOCS DM) user's default library.
 - ▶ **Use this library** - Select this option to save documents to a particular library, and then enter the name of the library in the text box.
 - ▶ **Prompt for library** - Select this option to prompt the Open Text Document Management, eDOCS Edition (eDOCS DM) user to select a library.

If you are configuring the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM) on an AccuRoute Server, the option you select has no impact on document routing. When routing documents on behalf of an AccuRoute Desktop user, the server uses the DMS configuration data from the workstation where the user generated the Routing Sheet.

- 6 Click **Finish**.

Configuring an existing AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM)

To complete the configuration wizard for an existing AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM) connector:

- 1 Click **Connectors** in the console tree and double-click the Open Text Document Management, eDOCS Edition (eDOCS DM) connector in the **Details** pane.
- 2 Click the **Advanced** tab.

- 3 Locate the DMS Configuration section and click **Configure**. The **Hummingbird DM Login Configuration** window appears.
- 4 Perform steps one through six in [Configuring a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\)](#) (3-4).

Section 4: Required Server Configuration

This section includes:

[Enabling DM as a recipient type in AccuRoute Desktop](#) (4-1)

Enabling DM as a recipient type in AccuRoute Desktop

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

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

To enable DM as a recipient type in AccuRoute Desktop

- 1 Click **Registered Users** in the console tree and double-click an individual user in the details pane, or right-click **Registered Users** in the console tree and select **User Defaults**.
- 2 Click the **Accuroute** tab.
- 3 Select **Enable Use Of The Accuroute Client**.
- 4 Locate **Allow User To Route To List** and select **DM**.
- 5 Click **OK** to save your changes.

Now when you start AccuRoute Desktop, DM is available.

Note Changes made to **Registered Users > User Defaults** do not affect any individual registered user. Changes made here affect only those users who do not have an individual record in the Registered Users database.

Section 5: Optional server configuration

This section includes:

[Changing the label of a document](#) (5-1)

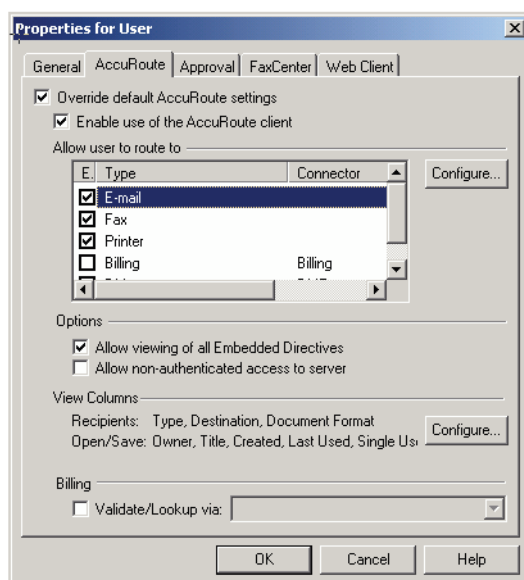
Changing the label of a document

Changing the label of a document type allows you to specify the name that appears to your users. For example, you might want TIFF (Image) to read Fax Format. You can change these labels in the Omtool Server Administrator under Registered Users.

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

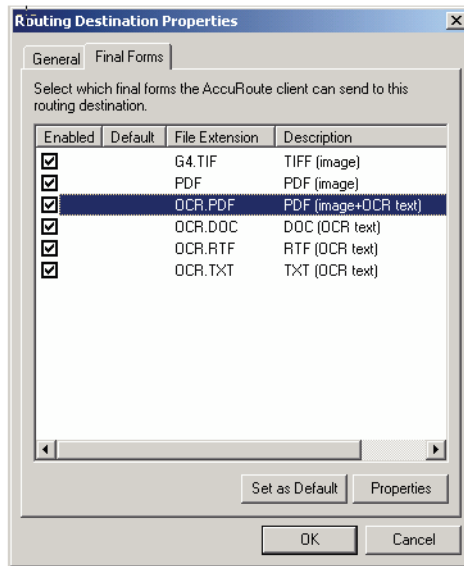
To change the label of a document type

- 1 Click **Registered Users** in the console tree and double-click an individual user in the details pane, or right-click **Registered Users** in the console tree and select **User Defaults**.
- 2 Click the **Accuroute** tab.
- 3 Highlight an item in the **Allow User To Route To** list.

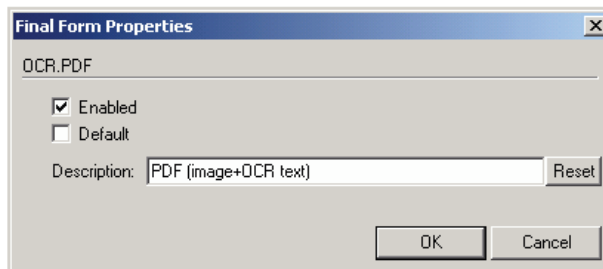


- 4 Click **Configure** and click the **Final Forms** tab.

- 5 Highlight the document type that needs to be modified.



- 6 Click **Properties**.
- 7 Enter the new label for this document type in the **Description** field.



- 8 Click **OK** to close all the open dialogs.
- 9 Repeat the above steps for any other document type for which you want to change the label.

Section 6: Client Configuration

This section includes:

[Configuring AccuRoute Desktop](#) (6-1)

[Configuring FaxCenter](#) (6-1)

[Configuring Swiftwriter](#) (6-2)

[Client deployment methods](#) (6-2)

Configuring AccuRoute Desktop

To add Open Text Document Management, eDOCS Edition (eDOCS DM) functionality to AccuRoute Desktop:

- 1 Start AccuRoute Desktop and log in.
- 2 Click **Tools** on the menu bar and select **Configure DMS**.
- 3 Select **DM** from the menu that appears. The **Hummingbird DM Login Configuration** window appears.
- 4 At this point, the configuration is identical to that of the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM) configuration. Perform steps one through six in [Configuring a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\)](#) (3-4).

Configuring FaxCenter

To add DM functionality to FaxCenter:

- 1 Start FaxCenter and log in.
- 2 Click **Tools** on the menu bar and select **Configure DMS**. The **Document Management Configuration** screen appears.
- 3 Select **DM** and click **Configure**. The **Hummingbird DM Login Configuration** screen appears.
- 4 At this point, the configuration is identical to that of the connector configuration. Perform steps one through three in [Configuring a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\)](#) (3-4).
- 5 Click **OK**.

Configuring Swiftwriter

To add DM functionality to Swiftwriter:

- 1 Start the Swiftwriter Configuration application in the Control Panel. The **Swiftwriter Configuration** screen appears.
- 2 Click **DM** in the list so that the option text is highlighted and click **Properties**. The **Hummingbird DM Login Configuration** screen appears.
- 3 At this point, the configuration is identical to that of the connector configuration. Perform steps one through three in [Configuring a new AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition \(eDOCS DM\)](#) (3-4).
- 4 Select **DM**, click **Apply**, and then click **OK**.

Client deployment methods

There are two methods available for deploying clients to individual workstations with Open Text Document Management, eDOCS Edition (eDOCS DM) functionality:

- Configure AccuRoute Desktop or FaxCenter to support Open Text Document Management, eDOCS Edition (eDOCS DM) on one client workstation. Then copy the Omtool DMS Libraries configuration file to the Omtool DMS Libraries setup directory where it can be propagated to client workstations during installation.
- Install either AccuRoute Desktop or FaxCenter on each individual workstation and perform the configuration steps for Open Text Document Management, eDOCS Edition (eDOCS DM) manually.

Configuring Open Text Document Management, eDOCS Edition (eDOCS DM) for client rollout

This procedure is optional. If you do not complete this procedure before deploying the Omtool DMS Libraries, you (or the user) must configure the Omtool DMS Libraries to support Open Text Document Management, eDOCS Edition (eDOCS DM) manually after you install AccuRoute Desktop or FaxCenter.

To pre-configure the Omtool DMS Libraries for deployment:

- 1 Install AccuRoute Desktop v4.0 or FaxCenter on a workstation.
- 2 Configure the Omtool DMS Libraries to support Open Text Document Management, eDOCS Edition (eDOCS DM). Select the settings that should apply to all workstations in your environment.
- 3 Go to the `C:\Program Files\Common Files\Omtool` directory on the workstation where AccuRoute Desktop v4.0 or FaxCenter is installed, and copy the `OmDMSDB.xml` file to the clipboard.
- 4 Go to the Omtool Server where AccuRoute Desktop or FaxCenter setup files are located, and paste the file to the following locations. When prompted to replace the existing file, click **Yes**.

`...\OmtoolServer\Clients\AccuRouteDesktop\Common\Omtool`

`...\OmtoolServer\Clients\FaxCenter\Common\Omtool`

You have pre-configured the Omtool DMS Libraries setup with the configuration data for Open Text Document Management, eDOCS Edition (eDOCS DM). When you are ready to deploy Open Text Document Management, eDOCS Edition (eDOCS DM), launch setup.exe in the AccuRoute Desktop or FaxCenter directory.

Configuring Open Text Document Management, eDOCS Edition (eDOCS DM) manually

To configure Open Text Document Management, eDOCS Edition (eDOCS DM) manually:

AccuRoute Desktop - (Go to [Configuring AccuRoute Desktop](#) on 6-1.) Follow these steps on all AccuRoute Desktop workstations.

- **FaxCenter** - [Configuring FaxCenter](#) (6-1)

Section 7: Optional Billing Configuration

This section includes:

[Enabling billing on the connector](#) (7-1)

[Enabling billing in the Billing component](#) (7-2)

[Enabling billing for Registered users](#) (7-2)

[Automatic billing entry](#) (7-2)

To use billing when profiling your Open Text Document Management, eDOCS Edition (eDOCS DM) message, enable billing on the Open Text Document Management, eDOCS Edition (eDOCS DM) connector, and then enable it for Registered Users.

Enabling billing on the connector

When enabling billing on the connector, the parent field in the matter properties of the connector must point to the display name of the client field and not the actual field name.

Billing field names are case sensitive. When configuring Author, Client, and Matter fields, make sure to use the correct case. Using the incorrect case causes billing validation to fail; lookups, however, are successful.

To enable Billing on the Open Text Document Management, eDOCS Edition (eDOCS DM) connector:

- 1 Click **Connectors** in the console tree, and double-click the Open Text Document Management, eDOCS Edition (eDOCS DM) connector to open the **Properties** page.
- 2 Click the **Advanced** tab.
- 3 Go to the **Billing** drop-down list, select either **Billing Selectable** or **Billing Mandatory**.
- 4 Where applicable, configure the **Author**, **Client**, and **Matter** fields in the **Fields** section.

In this section you can add new fields, remove existing fields, and specify the properties for fields in the list.

In the **Properties** section, you can select the field's **Display Name**, select **Must be validated against the DMS's codes**, how to validate (**Validate Field**, **Lookup Field**, and **Parent**), as well as set the **Minimum Length** and **Maximum Length** of the billing field. If an option is greyed out, it is not available for use.

- 5 Click **OK** to save the properties of the billing fields.
- 6 Change the Routing Identifier in the **Routing Identifier** text box if desired. It is populated with a default Routing Identifier.
- 7 Click **OK** to save your changes.

Enabling billing in the Billing component

If you are using CostRecovery, you also need to enable billing in the Billing component.

To enable billing in the Billing component:

- 1 Click **Components** in the console tree, and double-click the **Billing** component.
- 2 Click the **Configuration** tab.
- 3 Select **Enable Collection Of Billing Data**.
- 4 Add, Delete, or configure the Properties in the Omtool Property list if needed.
- 5 Click **OK**.

Enabling billing for Registered users

After you enable billing on the AccuRoute Connector for DMS Open Text Document Management, eDOCS Edition (eDOCS DM), you need to enable billing for the default Registered user and any individual Registered users.

To enable Billing for Registered users:

- 1 Click **Registered Users** in the console tree and double-click an individual user in the details pane, or right-click **Registered Users** in the console tree and select **User Defaults**.
- 2 Click the **Accuroute** tab.
- 3 Select **Validate/lookup Via**, then select the **DM** connector from the drop-down list.
- 4 Click **OK** to save your changes.

Billing Entry is now available in new instances of AccuRoute Desktop.

Automatic billing entry

Automatic billing entry functionality automatically inserts billing information from the message profile window. This functionality is available only with:

- AccuRoute Server v4.0
- AccuRoute Desktop v4.0

If you want to make automatic billing entry available in AccuRoute Desktop, you must modify the AccuRoute properties of Registered Users. A DMS that supports billing must be installed and configured, and billing must be enabled before you can use the automatic billing entry functionality.

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

Section 8: Testing

This section includes:

[Sending a message to DM](#) (8-1)

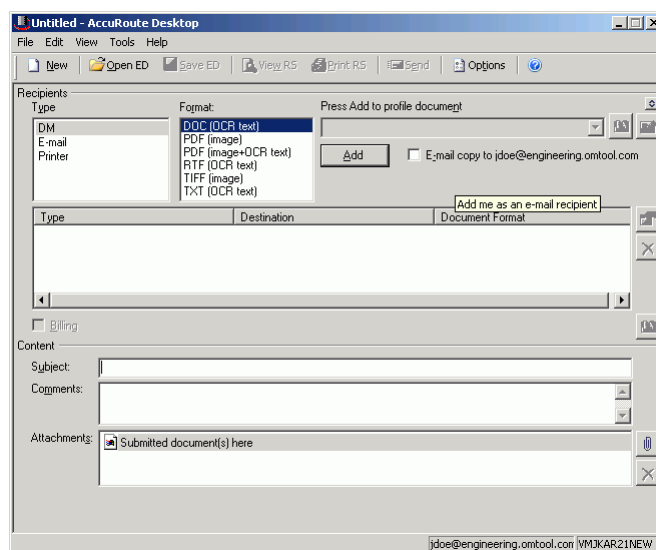
To test the installation and configuration of Omtool DMS Libraries v4.0 for DM, send a message using AccuRoute Desktop.

For detailed information on sending messages using AccuRoute Desktop, consult the [AccuRoute Desktop User Guide](#).

Sending a message to DM

To send a message to DM using AccuRoute Desktop:

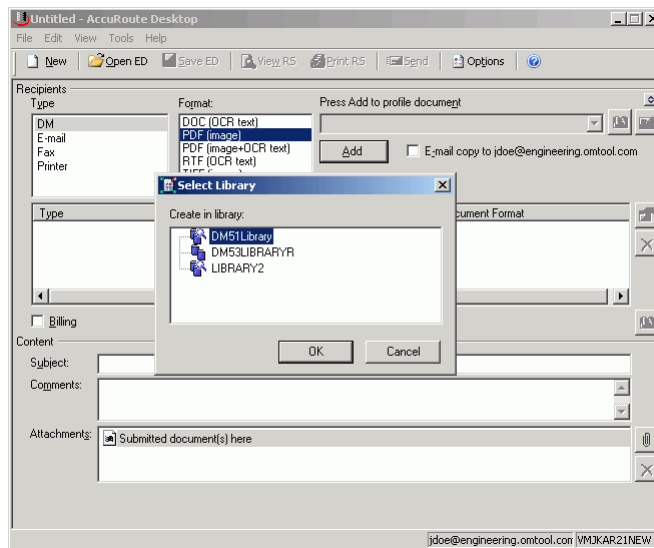
- 1 Start AccuRoute Desktop. Click **Start**, go to the Omtool programs group, and select **AccuRoute Desktop**. Log in if prompted. The application appears on your desktop.



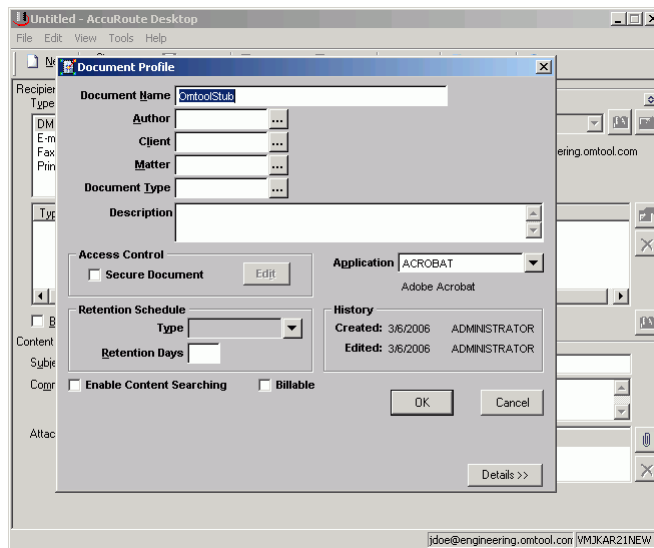
- 2 Select the destination type **DM** (DM) in the **Recipients Type** list and select a file format for your message in the **Format** list.

For more information on the available file formats, consult the AccuRoute Desktop User Guide.

3 Click **Add**. The **Select Library** window opens.

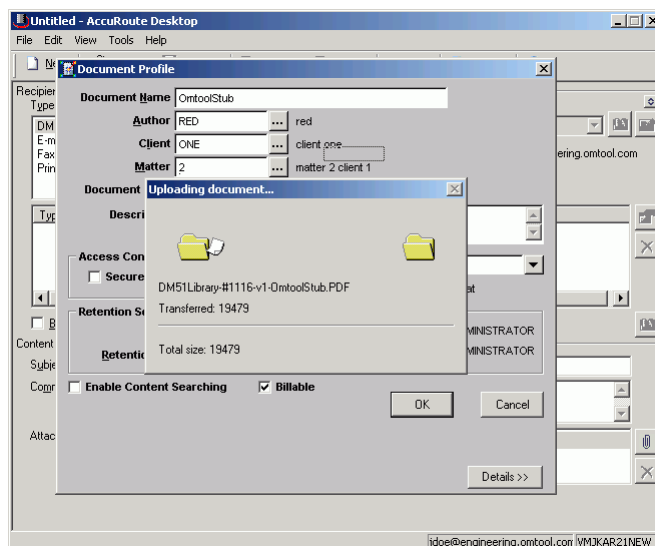


4 Select the appropriate DM library and click **OK**. The **Document Profile** window opens.

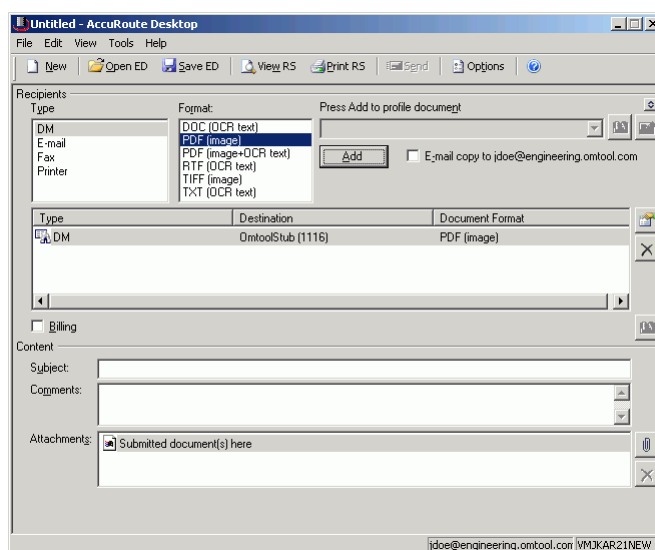


For information on using billing, consult the AccuRoute Desktop User Guide or your system administrator.

- 5 Complete the **Document Profile** window and click **OK**. The **Uploading document** window opens.



When the upload is complete, an OmtoolStub destination appears in the message.

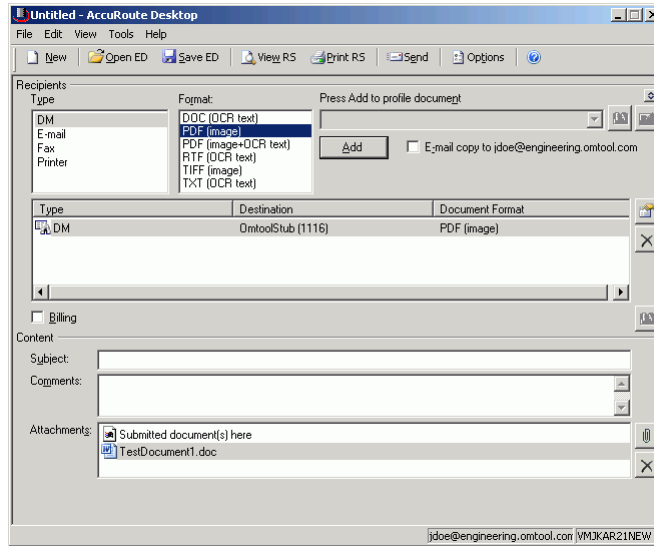


Note When you create a Routing Sheet for DM, AccuRoute creates a placeholder for the document. Never open, edit, or delete this placeholder.

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

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

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



7 Do any of the following:

Send the message immediately - Click **Send** on the toolbar. A message box indicates that your message has been sent to the server. (Your message must have at least one attachment.)

Save the message as an Embedded Directive - Click **Save ED** on the toolbar, type a title for the Embedded Directive, and click **Save**.

Print a Routing Sheet that can be scanned with hard copy documents - Save the message as an Embedded Directive. Then click **Print ED** on the toolbar. AccuRoute Desktop creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your network administrator. (Your message can include both electronic and hard copy documents.)

Section 9: Troubleshooting

This section includes:

[Detecting workflow issues](#) (9-1)

[Troubleshooting the delivery mechanism](#) (9-1)

[Troubleshooting the message on the Omtool Server](#) (9-1)

[Troubleshooting the multifunction device](#) (9-3)

[Troubleshooting the client](#) (9-4)

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

Detecting workflow issues

After a document has been profiled to DM, the document should arrive at its destination momentarily, but can take up to several minutes when the server workload is high. If a document does not arrive at its destination within a reasonable period of time, begin troubleshooting the environment. Omtool recommends troubleshooting the workflow in reverse order because this is the easiest way to troubleshoot the setup on your own.

The easiest way to troubleshoot a workflow issue is to follow the document through the workflow in reverse order. When a document does not arrive at its destination, troubleshooting starts with DM, and then continues to the Omtool Server, the device (if applicable), and then the client.

Troubleshooting the delivery mechanism

When the Omtool Server finishes processing a message, an outbound connector routes the message directly to its destination or passes the message to DM. Do some basic troubleshooting on DM. If DM is functioning correctly, troubleshoot the message on the Omtool Server.

For information on troubleshooting DM, consult DM's documentation.

Troubleshooting the message on the Omtool Server

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

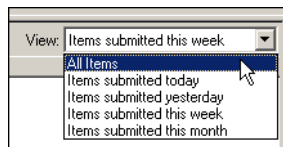
- Was the message submitted to the Omtool Server?

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

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

To locate the message on the Omtool Server:

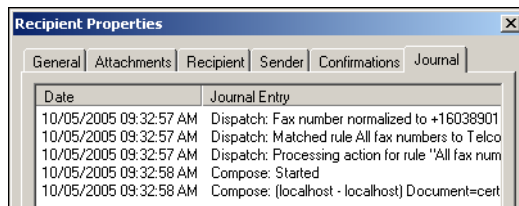
- 1 Start the Administrator.
- 2 Go to **Omtool Server Administrator > [ServerName] > Messages**.
- 3 Look for the message in the In Process queue:
 - a Click **In Process**.
 - b View **All Items**.



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

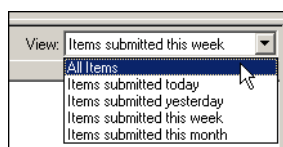
Note If you open the Journal while the message is still processing, you need to close the Journal properties before the Journal will update.

Also, check the Event Viewer for any information that might help troubleshoot the issue.

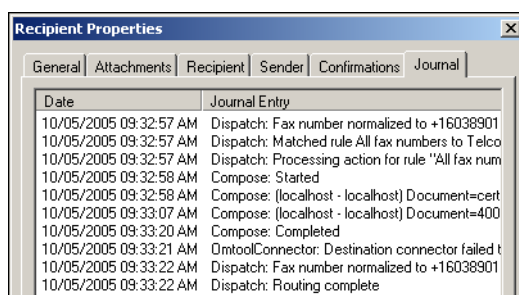


- **Message not found** - Go to step 4 and look for the message in the History queue.

- 4 Look for the message in the History queue:
 - a Click **History**. The message could be in either the Successful barometer or the General Failure barometer.
 - b View **All Items**.



- c Sort all items by the date submitted.
 - d Look for the message.
- **Message found** - Double-click the message and then click the **Journal** tab to view the message journal to determine the cause of the failure.



If the message failed, correct the issue and send the message again. Contact Omtool if you are unable to resolve the issue.

If the journal states that Omtool Server delivered the message but it still has not arrived at its destination, this indicates that the Omtool Server transferred the message to DM successfully. Do some advanced troubleshooting on DM to determine why the message is not being delivered to its destination. Contact Omtool if you are unable to resolve the issue.

Also, check the Event Viewer for any information that might help troubleshoot the issue.

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

Troubleshooting the multifunction device

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

Troubleshooting the client

If the device is working properly, try sending a message from the client to a recipient other than DM. If you are able to send messages to recipients other than DM and DM is operating correctly, contact Omtool.