Omtool DMS Libraries Installation and Integration Guide for WorkSite™

February 2013

Omtool support and sales

Online resources

The Omtool web site provides you with 24-hour access to documentation, software updates and other downloads, and detailed technical information that can help you troubleshoot issues. Go to http://www.omtool.com/support and log in using your customer number. Then click one of the following:

- **Knowledge Base** to access technical articles.
- **Downloads & Docs** to access online documentation, software updates, and downloads.

Customer service and technical support

Contact Omtool Customer Service or Technical Support using any of the following methods:

- **Phone**: +1/1 978 327 6800 or +1/1 888 303 8098 (toll-free in the US)
- **Fax**: +1/1 978 659 1301
- **E-mail**: customerservice@omtool.com or support@omtool.com

Technical support requires an active support contract. For more information, go to http://www.omtool.com/support/entitlements.cfm.

Sales, consulting services, licenses, and training

Contact Omtool Sales using any of the following methods:

- **Phone**: +1/1 978 327 5700 or +1/1 800 886 7845 (toll-free in the US)
- **Fax**: +1/1 978 659 1300
- **E-mail**: sales@omtool.com

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Section 1: Introduction

This guide contains instructions on deploying Omtool DMS Libraries v4.1 for WorkSite. It is written for systems administrators with detailed knowledge of the Omtool server and WorkSite.

This section includes:

Omtool DMS Libraries integration with Interwoven WorkSite

Omtool DMS Libraries v4.1 includes the ability to integrate with WorkSite.

Using Omtool DMS Libraries v4.1, you can be sure all of your important documents are stored in WorkSite. The combined power of AccuRoute Desktop and Omtool DMS Libraries v4.1 for WorkSite allows your users to send both soft copy and hard copy documents to WorkSite quickly and easily.

Best of all, there is no learning curve for your users—Omtool DMS Libraries v4.1 for WorkSite uses WorkSite's native windows and are totally familiar to your users.

For more information on profiling documents to WorkSite, go to Section 8: Testing.

Installation components

Omtool DMS Libraries v4.1 is included in the AccuRoute v4.1 installation.

> **Note**   The instructions in this guide are applicable only if you are running Omtool DMS Libraries v4.1

Deployment summary

To deploy Omtool DMS Libraries v4.1 for WorkSite:

1 Complete the installation requirements. (Go to <u>Section 3: Installation</u>.)

2 Complete required server configuration. (Go to <u>Section 4: Required Server Configuration</u>.)

3 Complete any optional server configuration. (Go to <u>Section 5: Optional Server Configuration</u>.)

4 Complete the client configuration. (Go to <u>Section 6: Client configuration</u>.)

5 Complete any optional billing configuration. (Go to <u>Section 7: Optional Billing Configuration</u>.)

6 Test profiling a document into WorkSite. (Go to <u>Section 8: Testing</u>.)

7 Troubleshoot the installation. (Go to <u>Section 9: Troubleshooting</u>.)

Release notes

Enhancements

Omtool DMS Libraries v4.1 for WorkSite includes the following enhancements:

- *Enhancement:* Multiple scans to WorkSite were not routing to the additional folder(s) specified. (See Knowledge Base article K03313.) Ref. A6639

- *Enhancement*: The Workspace Profile screen for WorkSite will automatically populate when profiling a document to a folder. (See Knowledge Base article K03481.) Ref. A6616

- *Enhancement*: When you configure the WorkSite connector, the profile screen offers a choice to Use Standard Profile or Use Enhanced Profile. This setting is invoked by AccuRoute Desktop, to show either the traditional profile screen or the new "Enhanced" profile screen for use with matter-centric environments.

- *Enhancement*: The Document Description field is now blank when the profile is invoked instead of pre-populating it with the text "Omtool Stub."

- *Enhancement*: The stub document is now completely removed from the desktop after the profile screen is completed. When a scan occurs, a new document is created automatically, even on the first scan, because the stub is not present.

- *Enhancement*: Worksite 8.2 is now supported. Ref. A8512

- Omtool DMS Libraries v4.1 for WorkSite has been qualified with AccuRoute Desktop v4.1.

Resolutions

Omtool DMS Libraries v4.1 for WorkSite include the following resolved issues.

- 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

- When you created a routing sheet set to allow multiple use with the private security scan to iManage, the first profiled document was fine; however, on subsequent scans with the same routing sheet, the profiled documents were public and the shared settings were not copied correctly. See Knowledge Base article K03622. Ref. A6864

- Billing lookup and validation now work correctly with WorkSite v8.1. Note that Billing lookup and validation is supported with the AccuRoute Desktop only. It is not supported with AccuRoute Client, or FaxCenter, or Swiftwriter.

- Documents that contain text (TXT, RTF, DOC, PDF Text, PDF image+text) can now be indexed and searched when they are profiled to the WorkSite database. Ref. A6686

- AccuRoute Desktop was not deleting temporary files (called "stub documents"), from some DMS applications. See Knowledge Base Article K03805. (Go to [Omtool support and sales](#) on the inside front cover.) 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. See Knowledge Base Article K03889. (Go to [Omtool support and sales](#) on the inside front cover.) Ref. A7896

- When using iManage Desksite and iManage Worksite server with impersonation passwords enabled, the iManage connector failed to route documents to the DMS application. The error code in the journal of the message was Access Denied (0x80004005), however, there was no error event generated in the Application Event Log. See Knowledge Base Article K03596. (Go to [Omtool support and sales](#) on the inside front cover.) Ref. A6801

Limitations

Omtool DMS Libraries v4.1 for WorkSite includes no known limitations.

Related AccuRoute 4.1 documentation

For more information about AccuRoute Desktop and other AccuRoute products, refer to the [AccuRoute v4.1 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

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

❒   AccuRoute v4.1

> **Note**   Currently, the Omtool DMS Libraries v4.1 are only available with the AccuRoute v4.1 server and client installations. The Omtool DMS Libraries v4.1 will be available as a separate download in the future.

❒   HP Autonomy iManage WorkSite™ v8.50 – v9.0

❒   WorkSite v8.50 – v9.0 installed on the Omtool server must not integrate with Microsoft Word

❒   DMS connector license

Entering a license for WorkSite

> **Note**   WorkSite requires a license. For more information, contact Omtool Sales.

You can activate the WorkSite 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:	
	● Activate License ○ Deactitvate License
Exported Activation File:	Browse...
	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.
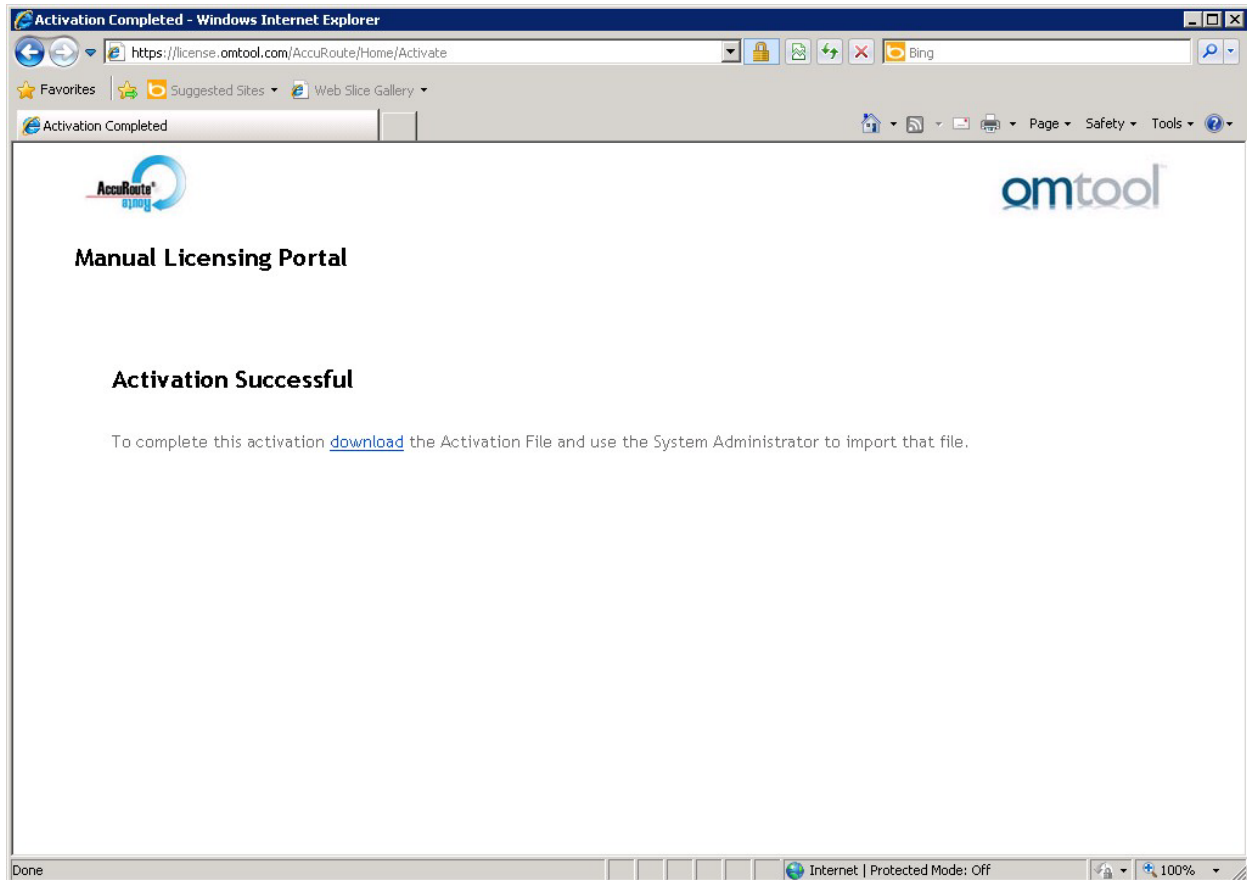
13 To complete the activation, click **Download**. The **File Download** page is displayed.

14 Click **Save** to create the Import file. By default, the file is named with the activation code. You can change this (for example, `ManaulActivation.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 `ManaulActivation.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 the Omtool DMS Libraries must meet the following minimum requirements:

- ❒ AccuRoute Desktop v4.1 or higher
- ❒ WorkSite Client (iManage DeskSite™ or iManage FileSite™)
- ❒ FaxCenter v3.4

Supported HP Autonomy WorkSite versions

The following WorkSite versions are supported:

- ❒ iManage DeskSite v8.50 – v9.0
- ❒ iManage FileSite v8.50 – v9.0

Section 3: Installation

This section includes:

Configuring the impersonation password (AccuRoute environments only)

WorkSite supports using an impersonation password. You must configure an impersonation password on the WorkSite server and configure the Omtool DMS Libraries on the AccuRoute server to use the impersonation password when logging in to the WorkSite server. (The impersonation password becomes critical when the AccuRoute server cannot obtain the WorkSite login credentials of the AccuRoute Desktop user. This is always the case when the WorkSite server accepts trusted authentication.) When the AccuRoute server uses the impersonation password configured on the WorkSite server, the AccuRoute server can route documents to the WorkSite server on behalf of AccuRoute Desktop users.

To configure the impersonation password:

1 Start the Service Manager for the WorkSite server.

2 Select a WorkSite server, click **Properties** on the menu bar, and select **Service Properties**.

3 Go to the **Security** section, select **Enable Impersonation**, type the impersonation password in the **Password** text box, and click **OK**.

4 Reboot the WorkSite server.

Continue to Adding the WorkSite connector.

Adding the WorkSite connector

Note The **Export Profile Information** and **Create Default Profile Information** buttons are not applicable for the WorkSite DMS connector at this time.

To add the WorkSite connector to an AccuRoute server:

1   Right-click **Connectors** in the console tree and select **New AccuRoute Server connector for >
WorkSite**. The **Server Address** screen appears.
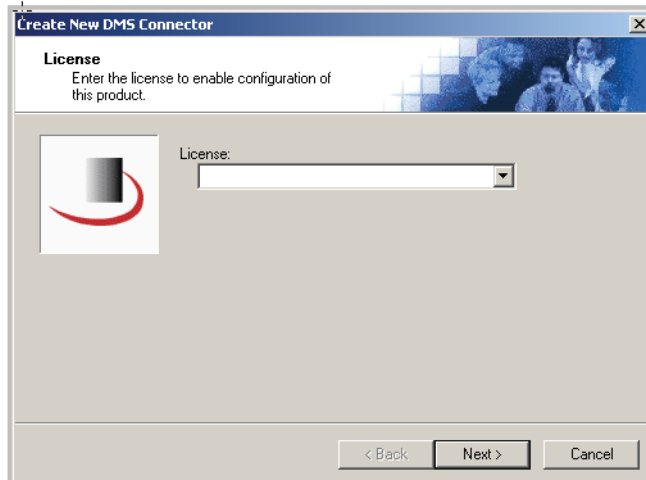
2   Select the server address to which you want this connector installed. Choose **Run on the Message
Server** or **Remote Server**. If you selected **Remote Server**, enter the name of the server. Click
Next. The **Display Name** screen appears.
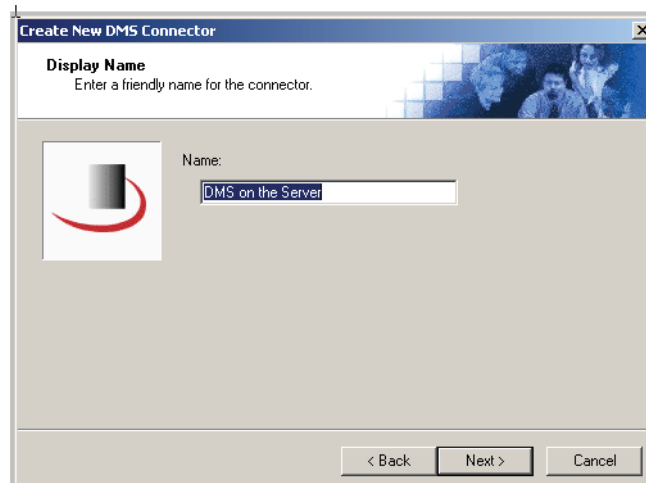
3   **WorkSite on the Server** appears as the default name. Type a friendly name for this connector in the **Name** text box and click **Next**. The **Congratulations** screen appears.
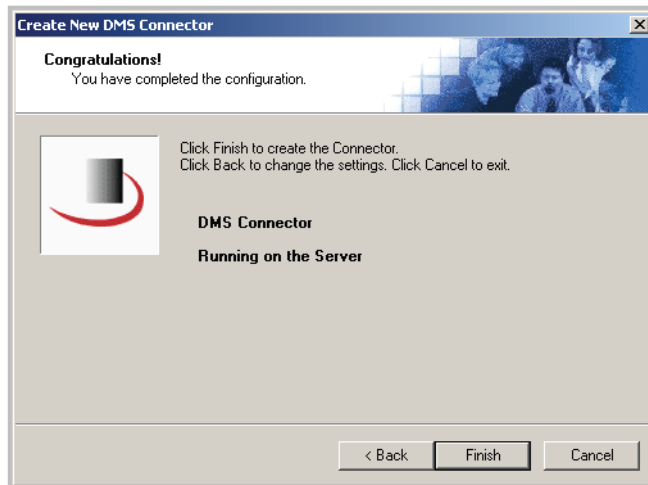
4   Click **Finish**.

The **DMS configuration wizard** launches and prompts you to configure the connector to support WorkSite.

Continue to Completing the WorkSite connector configuration wizard.

Completing the WorkSite connector configuration wizard

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 WorkSite connector

The **WorkSite Login Configuration** screen appears immediately after you complete the new connector wizard.

Figure 3-A: **WorkSite Login Configuration screen**

Enter the WorkSite server name on this screen.

To complete the configuration wizard for a new WorkSite connector:

Important   If you are using WorkSite 8.0, you must select "Use Enhanced Application Integration Dialog" in Step 5.

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1   Type the WorkSite server name in the **Server name** text box.

If you are configuring the WorkSite connector 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.

Leave this field blank if you want WorkSite to prompt the Omtool user to select a server. (This is recommended for users who save documents to more than one server.)

2   Click **Next**. The WorkSite Login Configuration window appears.

3   Select an authentication option:

Prompt for login always - Select this option if the WorkSite server should always prompt the Omtool user for WorkSite login credentials.

Prompt for login only if necessary - Select this option if the WorkSite server should prompt the Omtool user for WorkSite login credentials only when necessary.

If you are configuring the DMS connector 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 **WorkSite Profile Dialog** screen appears.
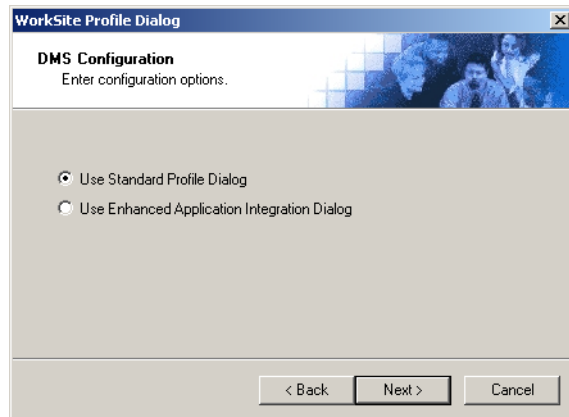
5   Select a WorkSite dialog option and click **Next**. The available options are **Use Standard Profile Dialog** and **Use Enhanced Application Integration Dialog**.
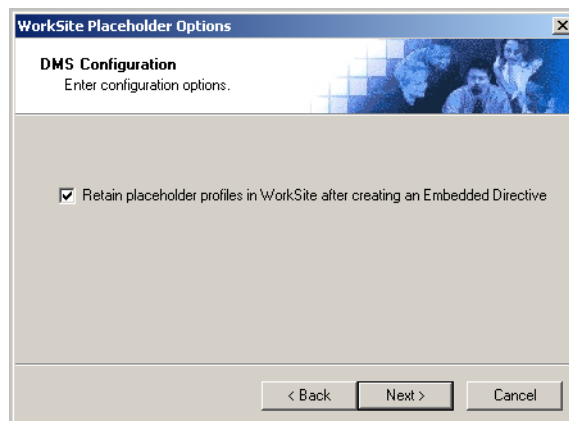
6   **Retain placeholder profiles in WorkSite after creating an Embedded Directive** is selected by default. When selected, this option retains the placeholder profile in WorkSite when the user adds a new WorkSite destination. If you clear this selection, the placeholder profile is deleted after the new WorkSite destination is added to AccuRoute Desktop.

7   Click **Next** and specify the Omtool user's WorkSite login credentials. Type 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, provide the user name for an administrative account that has the required permissions to access the stub document (document placeholder) on the WorkSite server and overwrite it with the actual document being routed, and provide the impersonation password you configured on the WorkSite server.

The AccuRoute server logs in to the WorkSite server with this user name only when the AccuRoute server cannot obtain the user name associated with the AccuRoute Desktop user.

8   Click **Finish**.

Configuring an existing WorkSite connector

To complete the configuration wizard for an existing WorkSite connector:

1   Click **Connectors** in the console tree, and double-click the **WorkSite** connector in the **Details** pane.

2   Click the **Advanced** tab.

3   Locate the **DMS Configuration** section, and click **Configure**. The **WorkSite Login Configuration** screen appears.

4   Perform steps one through eight in <u>Configuring a new WorkSite connector</u> (3-3).

Upgrading an existing iManage connector to WorkSite

Use the following procedure to upgrade your existing iManage connector to the WorkSite connector.

Note   Contact Omtool Customer Service for a new License code for the WorkSite integration.

To upgrade the iManage connector:

1   Rename the existing iManage DMS connector **Routing Identifier** to "Old iManage".

2   Rename the new WorkSite DMS connector **Routing Identifier** to "iManage". Verify that old Embedded Directives created using the iManage DMS connector now successfully route to the new WorkSite DMS connector.

3   Change the server configuration so that billing lookup and validation is done against the WorkSite DMS connector instead of the iManage DMS connector.

4   Change the configuration for Registered Users to enable use of the WorkSite DMS connector and disable use of the iManage DMS connector.

5   Send a test message using the new WorkSite DMS connector. (Go to Section 8: Testing.)

6   Delete the old iManage DMS connector.

Note	Note: To ensure that old routing sheets work with the new connector do not use the new connector until it's routing identifier is named to match the original name.

Section 4: Required Server Configuration

This section includes:

Enabling WorkSite as a recipient type in AccuRoute Desktop

If you have added support for WorkSite 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 WorkSite 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 **WorkSite**.

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

Now when you start AccuRoute Desktop, WorkSite 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

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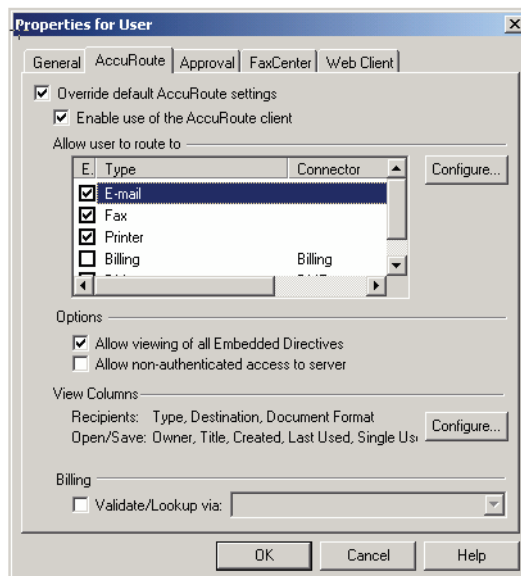
4   Click **Configure** and click the **Final Forms** tab.

5 Highlight the document type that needs to be modified.
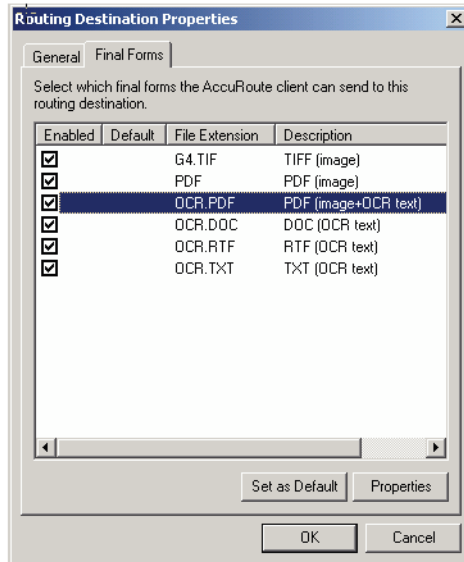
6 Click **Properties**.

7 Enter the new label for this document type in the **Description** field.
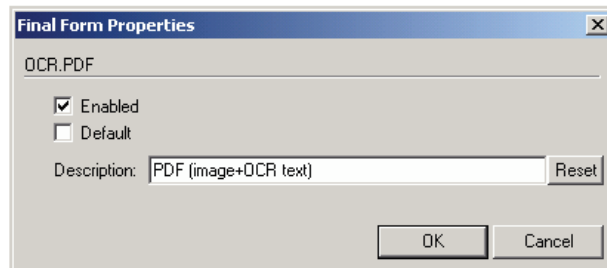
8 Click **OK** to close all the open dialogs.

9 Repeat the above steps for any other document type for which you want to change the label.

Configuring document link

This section includes:

Omtool provides you with the ability to generate a confirmation e-mail that includes an active link to the document stored in WorkSite. Clicking the http link opens the document that was stored in WorkSite as instructed by the AccuRoute Routing Sheet.

Generating a confirmation e-mail that includes an active link requires the following components:

- AccuRoute Server v4.1

- AccuRoute Desktop v4.1

- Internet Information Service (IIS)

- Omtool Web Client

> **Note**   When creating a Routing Sheet, you must configure the message Options to include an E-mail notification.

Installing the Omtool Web Client

If you are not already using the Omtool Web Client, you will need to install it before you can generate confirmation e-mails that include an active link.

For detailed instructions for deploying the Omtool Web Client, consult the Omtool Web Client Implementation Guide available on the [AccuRoute v4.1 documentation home page](#).

Defining an outbound rule

Generating a confirmation e-mail that contains a document link utilizes the AccuRoute SMTP connector. In order to use this feature, make sure one of the following rules is defined in your list of Outbound Rules:

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

- All e-mail to SMTP on the Server - Created by Connector Wizard

> **Note**   If one of the above rules doesn't exist, you need to create one of them. See the Administrator help for information on creating rules, available on the [AccuRoute v4.1 documentation home page](#).

Customizing the notification template

In order to build the notification message, you need to customize the AccuRoute notification template.

> **Note**   The document link only works for the originator of the message. When multiple recipients are selected for the notification, the other recipients will see the following message when attempting to view the document:
>
> ```
> Invalid JobID specified
> The fax may have been deleted, or you may not be authorized to view that
> fax.
> [UserEmail = 'administrator@stress.omtool.com'
> FaxOwner= 'jdm@documentation.omtool.com']
> ```

To customize the AccuRoute template:

1   Use Wordpad to open the following file:

```
...\Omtool\OmtoolServer\Languages\ENU\Templates\OMNotification-
Success.OMTPL
```

2 Add the following line to this file. You can add the line anywhere.

```
http://Your AccuRoute server name/Your Virtual Directory name/
LaunchDMS.asp?jobID=%JOB_ID%
```

3 Replace `Your AccuRoute server name` with the actual name of your AccuRoute server.

4 Save and close the template notification file.

The following example shows a sample of the template notification file configured to generate a confirmation e-mail containing a document link:

```
The message you sent to %RECIP_NAME% at %DESTINATION%, was delivered
successfully on %DATE_DELIVERED% at%TIME_DELIVERED%
```

```
JobID: %JOB_ID%
```

```
Open the Document: http://Your AccuRoute server name/Your Virtual Directory
name/LaunchDMS.asp?jobID=%JOB_ID%
```

```
FaxID: %FAX_PAGE1%
```

Section 6: Client configuration

This section includes:

Configuring AccuRoute Desktop

| *Important* | If you are using DeskSite and/or FileSite v8.0, you must select "Use Enhanced Application Integration Dialog." |

To add WorkSite functionality to AccuRoute Desktop:

1   Start AccuRoute Desktop and log in.

2   Click **Tools** on the menu bar and select **Configure DMS**.

3   Select **WorkSite** from the menu that appears.

At this point, the configuration is identical to that of the connector configuration. Perform steps one through eight in Configuring a new WorkSite connector (3-3).

Continue to Client deployment methods (6-2)

Configuring FaxCenter

| *Important* | If you are using DeskSite and/or FileSite 8.0, you must select "Use Enhanced Application Integration Dialog." |

| **Note** | Billing lookup and validation is not supported in FaxCenter. It is available only with AccuRoute Desktop. |

To add WorkSite 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 **WorkSite** and click **Configure**. The **WorkSite Login Configuration** screen appears.

4   At this point, the configuration is identical to that of the connector configuration. Perform steps one through six in <u>Configuring a new WorkSite connector</u> (3-3).

5   Click **OK**.

Configuring Swiftwriter

To add iManage functionality to Swiftwriter:

1   Start the Swiftwriter Configuration application in the Control Panel. The **Swiftwriter Configuration** screen appears.

2   Click **WorkSite** in the list so that the option text is highlighted and click **Properties**. The **WorkSite Login Configuration** screen appears.

3   At this point, the configuration is identical to that of the connector configuration. Perform steps one through six in <u>Configuring a new WorkSite connector</u> (3-3).

4   Click **Apply** and then click **OK**.

Client deployment methods

There are two methods available for deploying clients to individual workstations with WorkSite functionality:

- Configure AccuRoute Desktop or FaxCenter tto support WorkSite 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. Continue to <u>Configuring WorkSite for client rollout</u>. below

- Install AccuRoute Desktop or FaxCenter on each individual workstation and perform the configuration steps for WorkSite manually. Continue to <u>Configuring WorkSite manually</u>.

Configuring WorkSite 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 WorkSite manually after you install AccuRoute Desktop.

To pre-configure the Omtool DMS Libraries for deployment:

1   Install AccuRoute Desktop v4.1 or FaxCenter on a workstation.

2   Configure the Omtool DMS Libraries to support WorkSite. Select the settings that should apply to all workstations in your environment.

3   Navigate to the `...\Program Files\Common Files\Omtool` directory on the workstation where AccuRoute Desktop or FaxCenter is installed, and copy the `OmDMSDB.xml` file to the clipboard.

4 Navigate 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 WorkSite. When you are ready to deploy WorkSite, launch `setup.exe` in the `AccuRouteDesktop4.1` directory.

Configuring WorkSite manually

To configure WorkSite 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:

To use billing when profiling your WorkSite message, enable billing on the WorkSite 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 WorkSite connector:

1   Click **Connectors** in the console tree, and double-click the WorkSite connector.

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.

8   Continue to Enabling billing in the Billing component (7-2).

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**.

6 Continue to <u>Enabling billing for registered users</u> (7-2).

Enabling billing for registered users

After you enable billing on the WORLDOX connector, 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 **WORLDOX** connector from the drop-down list.

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

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

5 Continue to <u>Automatic billing entry</u> (7-2).

Automatic billing entry

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

- AccuRoute server v4.1
- AccuRoute Desktop v4.1

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:

To test the installation and configuration of Omtool DMS Libraries v4.1 for WorkSite, send a message using AccuRoute Desktop. WorkSite includes two options, the Enhanced Profile Dialog and the Standard Profile Dialog.

For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to Related AccuRoute 4.1 documentation on 1-3.

Standard profile dialog

**To send a message to WorkSite™ 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.
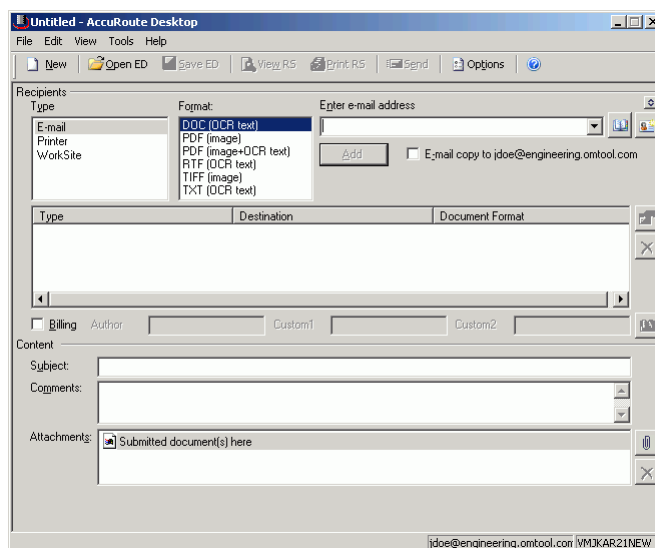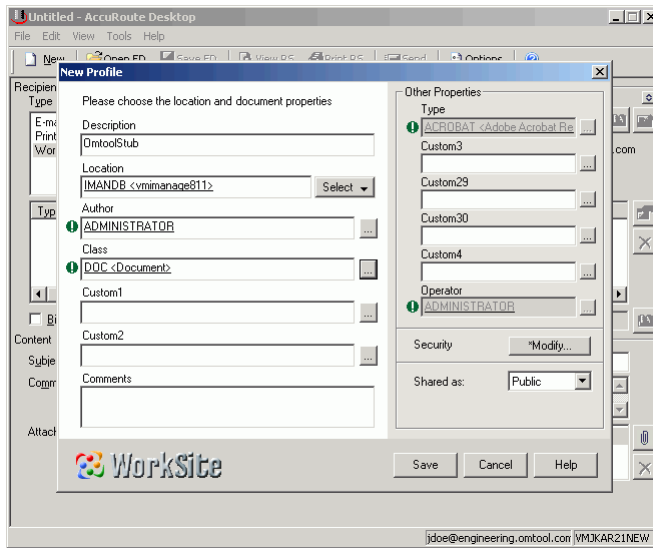

2   Select the destination type **WorkSite** in the **Recipients Type** list and select a file format for your message in the **Format** list.

For more information on the available file formats, consult the AccuRoute Desktop User Guide, available on the AccuRoute v4.1 documentation home page.
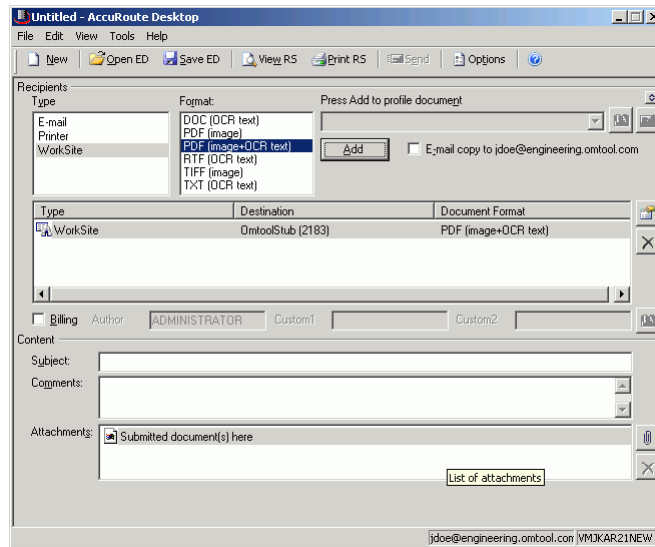
3   Click **Add**. The **New Profile** screen appears.
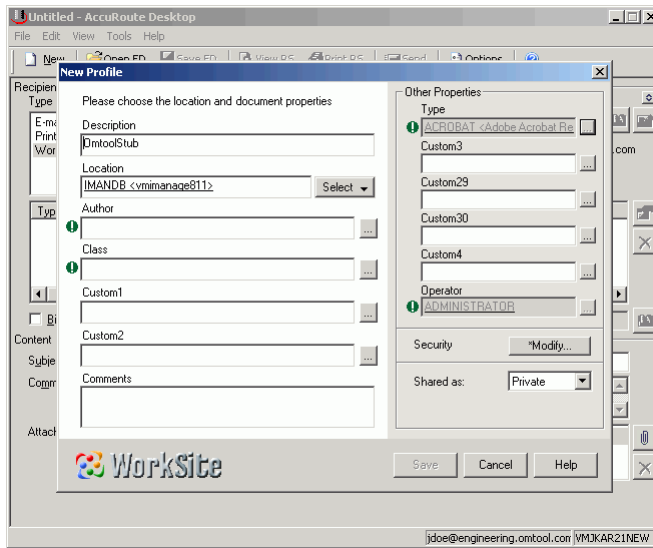
4   Enter any required fields.

5 Complete any optional information as appropriate and click **Save**. An OmtoolStub destination appears in the message.
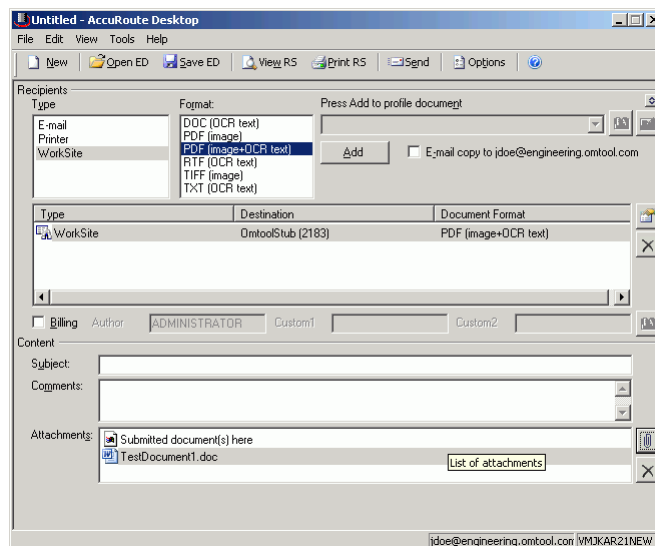

For information on using billing, consult the AccuRoute Desktop User Guide, available on the [AccuRoute v4.1 documentation home page](#), or consult your system administrator.

6 Add content to your message.

a Locate the **Content** section at the bottom and type a subject and comments.

b Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:

File - Select this option to attach a file saved from your computer or network share. 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. Type 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.)

Enhanced profile dialog

To send a message to WorkSite™ 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.
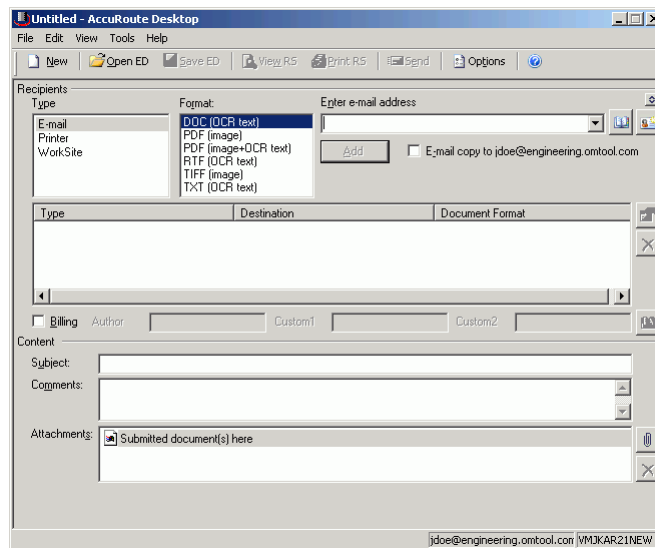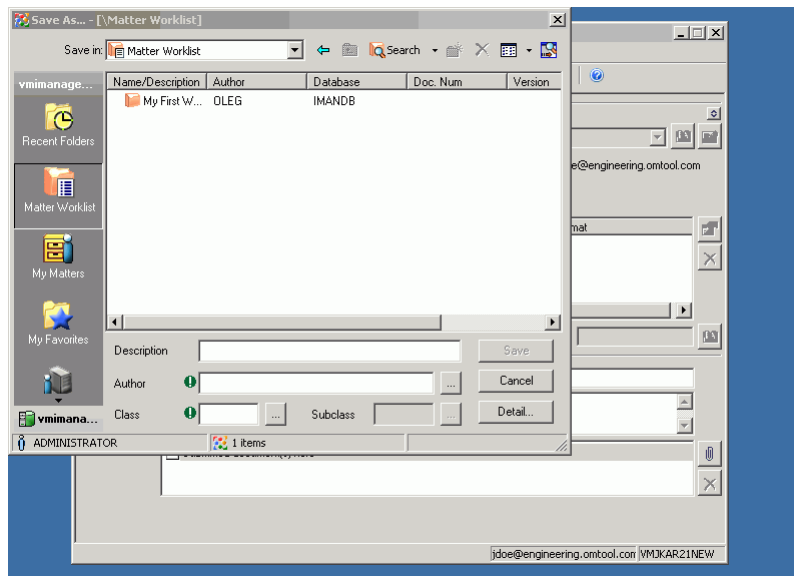

2　Select the destination type **WorkSite** in the **Recipients Type** list and select a file format for your message in the **Format** list.
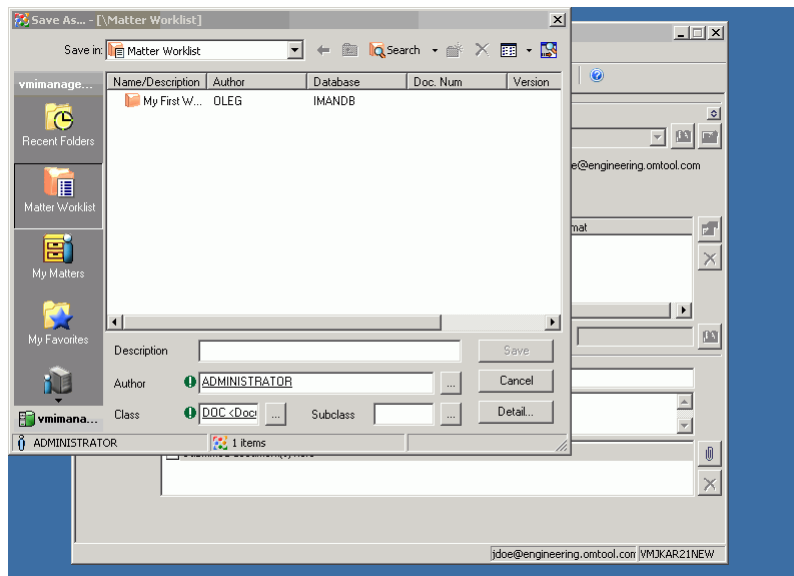
For more information on the available file formats, consult the AccuRoute Desktop User Guide, available on the AccuRoute v4.1 documentation home page.

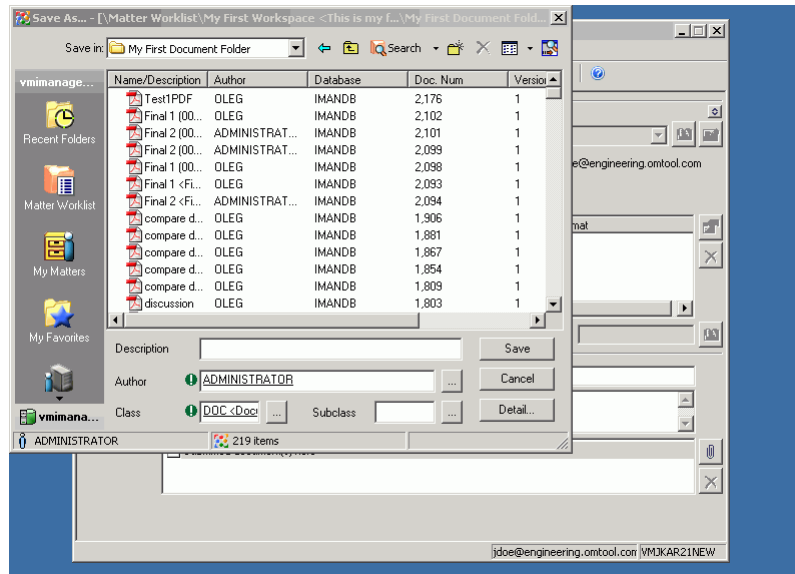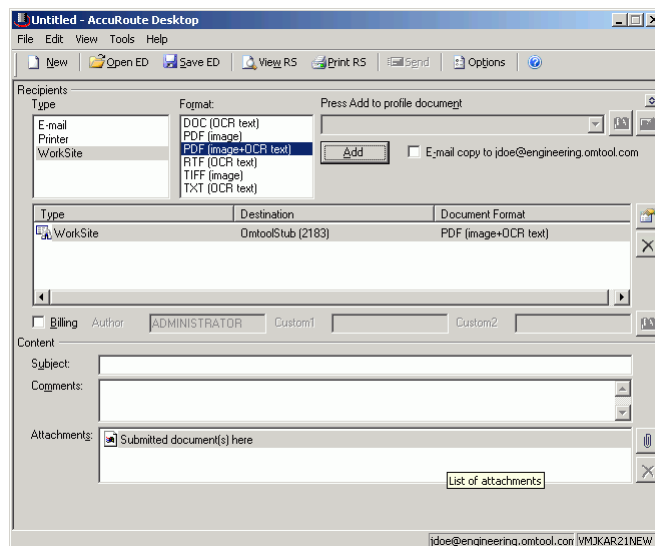**3**   Click **Add**. The **Save As [\Matter Worklist]** screen appears.

4   Enter **Author** and **Class** (required fields).

5   Double-click the worklist and subsequent folders until you reach the desired location for your document and then click **Save**.

6   Complete any optional information if desired and click **Save**. An OmtoolStub destination appears in the message.
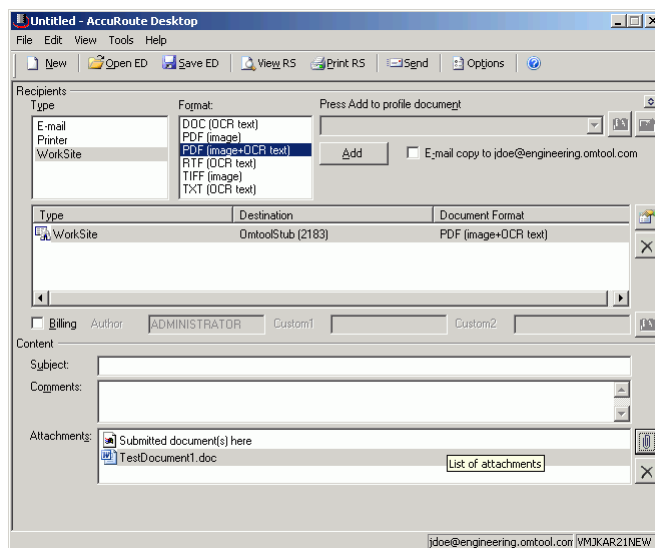

For information on using billing, consult the AccuRoute Desktop User Guide, available on the [AccuRoute v4.1 documentation home page](#), or your system administrator.

7   Add content to your message.

     a   Locate the **Content** section at the bottom and type a subject and comments.

     b   Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:

     File - Select this option to attach a file saved from your computer or network share. 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. Type 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**.

8 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:

Complete these procedures in the order they appear. If you cannot resolve the issue, contact Omtool. (Go to Omtool support and sales on the inside front cover.)

Detecting workflow issues

After a document has been profiled to WorkSite, 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 WorkSite, and then continues to the Omtool server, the device (if applicable), and then the client.

Continue to Troubleshooting the delivery mechanism.

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 WorkSite. Do some basic troubleshooting on WorkSite. If WorkSite is functioning correctly, troubleshoot the message on the Omtool server.

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

Continue to Troubleshooting the message on the Omtool server.

## 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**.
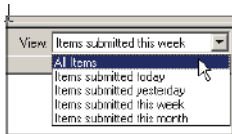
c Sort all items by the date submitted.

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.
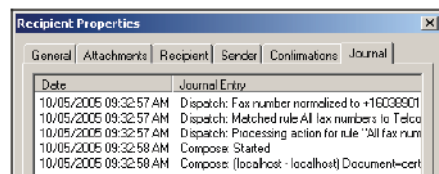

- **Message not found** - Go to step 4 and look for the message in the History queue.

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**.
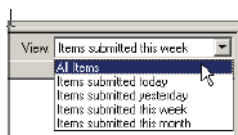
c Sort all items by the date submitted.

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.
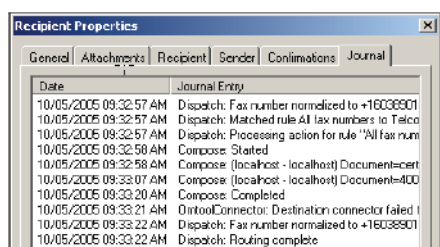
If the message failed, correct the issue and send the message again. Contact Omtool if you are unable to resolve the issue. (Go to <u>Omtool support and sales</u> on the inside front cover.)

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 WorkSite successfully. Do some advanced troubleshooting on WorkSite to determine why the message is not being delivered to its destination. Contact Omtool if you are unable to resolve the issue. (Go to <u>Omtool support and sales</u> on the inside front cover.)

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.

Continue to <u>Troubleshooting the multifunction device</u>.

Troubleshooting the multifunction device

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

Continue to <u>Troubleshooting the client</u>.

Troubleshooting the client

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