Omtool DMS Libraries v4.1 Installation and Integration Guide for WORLDOX

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Omtool, Ltd.
6 Riverside Drive
Andover, MA 01810
Phone: +1/1 978 327 5700
Toll-free in the US: +1/1 800 886 7845
Fax: +1/1 978 659 1300

Omtool Europe
25 Southampton Buildings
London
WC2A 1AL
United Kingdom
Phone: +44/0 20 3043 8580
Toll-free in the UK: +44/0 80 0011 2981
Fax: +44/0 20 3043 8581

Web: http://www.omtool.com

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Section 1: Introduction

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

This section includes:

Omtool DMS Libraries integration with WORLDOX (1-1)

Installation components (1-1)

Deployment summary (1-2)

Release notes (1-2)

Related AccuRoute v4.1 documentation (1-3)

Omtool DMS Libraries integration with WORLDOX

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

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

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

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

Installation components

Omtool DMS Libraries v4.1 is included in the AccuRoute v4.1 installation. If you have AccuRoute v4.0, you should apply the AccuRoute Desktop v4.1Update to the Omtool server.

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

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Deployment summary

To deploy Omtool DMS Libraries v4.1 for WORLDOX:

1. Complete the installation requirements. (Go to Section 3: Installation.)
2. Complete 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. (Go to Section 7: Optional Billing Configuration.)
6. Test profiling a document into WORLDOX. (Go to Section 8: Testing.)
7. Troubleshoot the installation. (Go to Section 9: Troubleshooting.)

Release notes

Enhancements

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

- Omtool DMS Libraries v4.1 for WORLDOX has been qualified with AccuRoute Desktop v4.1 or higher.

Resolutions

Omtool DMS Libraries for WORLDOX includes the following resolved issues:

- Scans were not making it to WORLDOX GX. Created a routing sheet to WORLDOX GX successfully. When scanning the routing sheet and document to the AccuRoute server, the scan failed with the following message: Failed to open the session for the DMS object, 0x80004005. See Knowledge Base Article K03787. (Go to Omtool support and sales on the inside front cover.) Ref. A7457
- Client, Matter, and Author were not auto-populating after entering WORLDOX profile information in AccuRoute Desktop. See Knowledge Base Article K03788. (Go to Omtool support and sales on the inside front cover.) Ref. A7501
- 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. (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. Ref. A8264

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- When you created a single use Routing Sheet and scanned it into the AccuRoute server, the Routing Sheet immediately failed with the following error: Failed to deliver message - (DMS provider does not support multiple use). See Knowledge Base Article K03281. (Go to Omtool support and sales on the inside front cover.) Ref. A5908

Limitations

Omtool DMS Libraries for WORLDOX includes no known limitations.

Related AccuRoute v4.1 documentation

For more information about AccuRoute v4.1 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

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Section 2: Requirements

This section includes:

Server requirements (2-1)

Client requirements (2-1)

Supported WORLDOX versions (2-2)

Server requirements

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

- ❒ AccuRoute v4.1.

  If you are using AccuRoute v4.0 or earlier, you must apply the AccuRoute Desktop v4.1 update to the Omtool server. This update includes Omtool DMS Libraries v4.1.

  Note Currently, the Omtool DMS Librariesv4.1 are only available with the AccuRoute v4.1 server and client installations. The Omtool DMS Librariesv4.1 will be available as a separate download in the future.

- ❒ The WORLDOX client software must be installed and running during the Omtool DMS Libraries configuration. Additionally, all computers running WORLDOX must be connected to the file server where WORLDOX has been installed. The connection must be by a UNC path on the server.
- ❒ The WORLDOX client software installed on the Omtool server must not integrate with Microsoft Word
- ❒ Tier 2 DMS connector license

Client requirements

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

- ❒ AccuRoute Desktop v4.1 or higher
- ❒ The WORLDOX client software must be installed

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Supported WORLDOX versions

The following versions of WORLDOX are supported:

- WORLDOX® GX/2002/GX3 by World Software Corporation

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Section 3: Installation

This section includes:

Additional server configuration for WORLDOX 2002 and WORLDOX GX (3-1)

Additional WORDOX 2002 and WORLDOX GX configuration (3-2)

Adding the WORLDOX connector (3-3)

Completing the WORLDOX connector configuration wizard (3-4)

Additional server configuration for WORLDOX 2002 and WORLDOX GX

You must perform the following steps on the Omtool server before adding the DMS connector for WORLDOX. Follow the procedure that applies to your operating system.

Configuring Windows 2003 (3-1)

Configuring Windows 2000 (3-2)

Configuring Windows 2003

> **Note** The Omtool Service account user must stay logged into the AccuRoute server, and the WORLDOX connector must be manually re-enabled after each server reboot.

To perform additional server configuration on Windows 2003:

1. Right-click **My Computer** and select **Properties**.
2. Click the **Advanced** tab and click **Environmental Variables**.
3. Under the **User variables** section, locate the path to WORLDOX and copy it.
4. Under the **System variables** section, select **Path** and click **Edit**.
5. Go to the end of the path and copy the path to your WORLDOX directory. Make sure that you include a semi-colon (;) before your WORLDOX path if one doesn't already exist.
6. Click **OK** three times to exit and save your changes.
7. Go to **Start > Run**, type `dcomcnfg`, and then click **OK**.
8. Expand **Component Services > Computers > My Computer**.
9. Under **My Computer**, expand **DCOM Config**.
10. Scroll down to **omConDMS**, highlight it, and click **Properties**.

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11 Click the **Identity** tab.

12 Select **The interactive user**.

13 Click **OK** twice.

14 Reboot the server.

Continue to Additional WORDOX 2002 and WORLDOX GX configuration.

Configuring Windows 2000

Note The Omtool Service account user must stay logged into the AccuRoute server, and the WORLDOX connector must be manually re-enabled after each server reboot.

To perform additional server configuration on Windows 2000:

1 Right-click **My Computer** and select **Properties**.

2 Click the **Advanced** tab and click **Environmental Variables**.

3 Under the **User variables** section, locate the path to WORLDOX and copy it.

4 Under the **System variables** section, select **Path** and click **Edit**.

5 Go to the end of the path and copy the path to your WORLDOX directory. Make sure that you include a semi-colon (;) before your WORLDOX path if one doesn't already exist.

6 Click **OK** three times to exit and save your changes.

7 Go to **Start > Run**, enter `dcomcnfg`, and then click **OK**.

8 Click the **Applications** tab.

9 Scroll down to **omConDMS**, highlight it, and click **Properties**.

10 Click the **Identity** tab.

11 Select **The interactive user**.

12 Click **OK** twice.

13 Reboot the server.

Continue to Additional WORDOX 2002 and WORLDOX GX configuration.

Additional WORDOX 2002 and WORLDOX GX configuration

Before adding the DMS connector for WORLDOX, create a WORLDOX user. This user should have administrative rights in WORLDOX.

Continue to Adding the WORLDOX connector.

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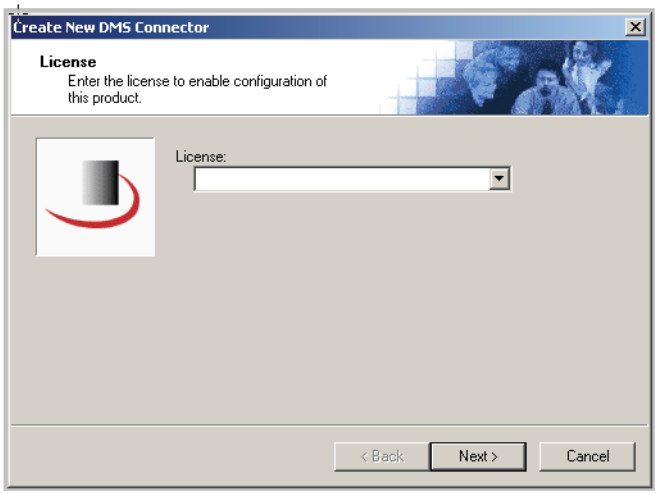
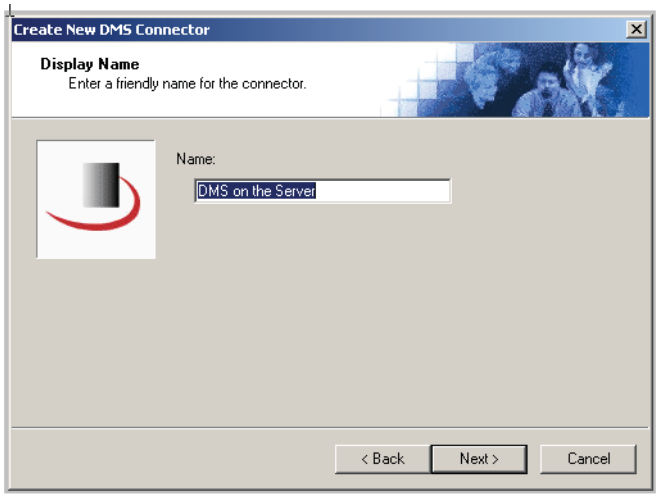
Adding the WORLDOX connector

To add the WORLDOX connector to an AccuRoute server:

1 Right-click **Connectors** in the console tree and select **New > DMS**. The License window appears.



2 Type the license key for the WORLDOX connector in the **License** text box and click **Next**. The Display Name window appears.



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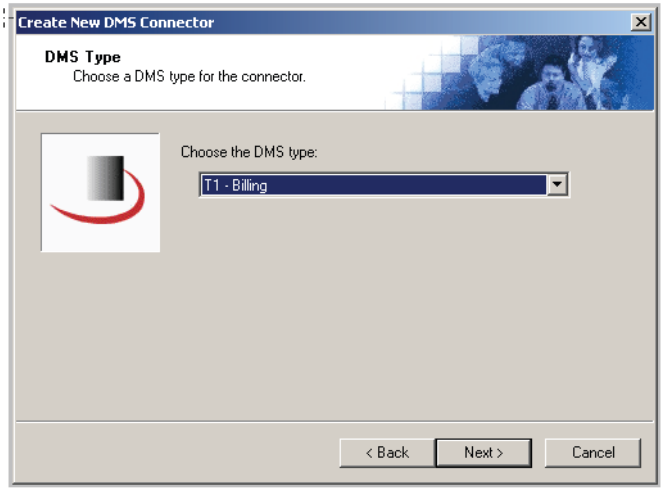
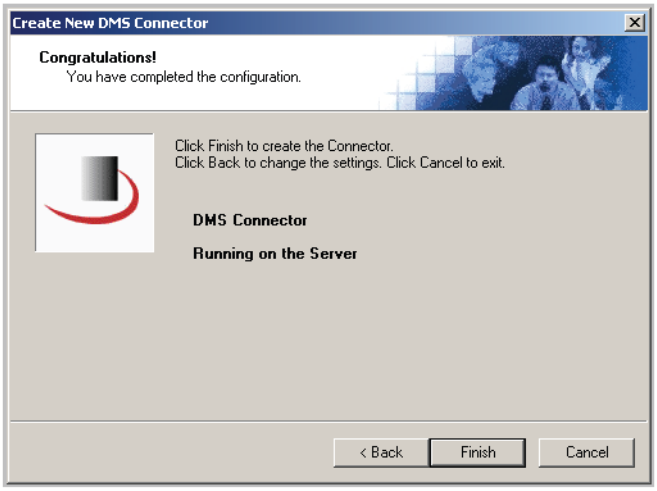
3 Type a friendly name for this connector in the **Name** text box and click **Next**. The DMS Type window appears.



4 Select **T2 - Worldox** from the drop-down list and click **Next**. The Congratulations window appears.



The configuration complete window opens.

5 Click **Finish** to complete the configuration.

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

Completing the WORLDOX connector configuration wizard

All Omtool applications on the same system share the Omtool DMS Libraries configuration (3-5)

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Configuring a new WORLDOX connector (3-5)

Configuring an existing WORLDOX connector (3-6)

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 WORLDOX connector

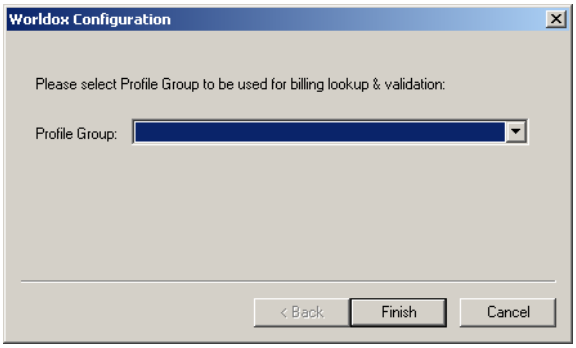
Important The WORLDOX client must be running during this setup procedure.

When installing WORLDOX on a workstation, you mapped a drive to the working directory on the WORLDOX server. After you install WORLDOX, do not disconnect this mapped drive.

The Worldox Configuration window appears immediately after you complete the new connector wizard.

***Figure 3-A:* Worldox Configuration window**

Select the profile group that should be used to look up billing codes and validate billing data for the Omtool user on this window.



To complete the configuration wizard for a new WORLDOX connector:

1. Select the profile group that should be used to look up billing codes and validate billing data for the Omtool user.

   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.

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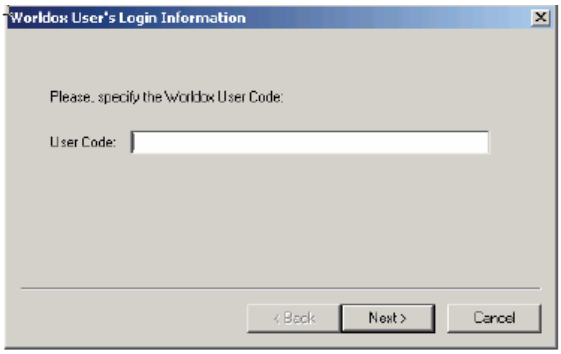
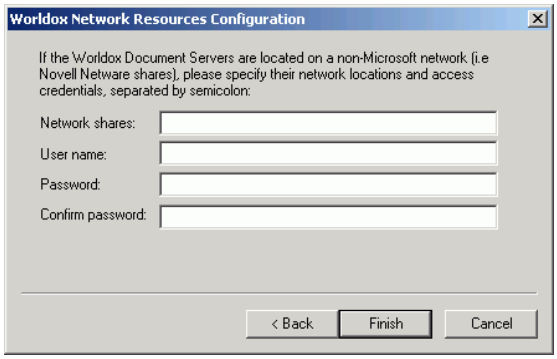
2 Click **Next**. The Worldox User's Login Information window appears.



3 Enter a valid WORLDOX User Code. This user should have administrative rights in WORLDOX.

4 Click **Next**. The Worldox Network Resources Configuration window appears.



5 If you are connecting to a shared drive that is not running Windows (for example, a Novell drive), enter the network locations in the **Network shares** text box. You can enter multiple locations, separated by a semicolon.

6 Enter the shared drive that is not running Windows authentication information in the **User name**, **Password**, and **Confirm password** text boxes.

7 Click **Finish**.

Configuring an existing WORLDOX connector

To complete the configuration wizard for an existing WORLDOX connector:

1 Click **Connectors** in the console tree and double-click the **WORLDOX** connector in the details pane.

2 Click the **Advanced** tab.

3 Locate the **DMS Configuration section**, and click **Configure**. The Worldox Configuration window appears.

Perform steps one through seven in Configuring a new WORLDOX connector (3-5).**FaxCenter supports only one DMS application**: FaxCenter can support only one DMS application, even though other Omtool applications such as the AccuRoute Desktop and Swiftwriter can support multiple DMS applications concurrently.

4

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Section 4: Required Server Configuration

This section includes:

Enabling Accutrac XE as a recipient type in AccuRoute Desktop (4-1)

Enabling Accutrac XE as a recipient type in AccuRoute Desktop

If you have added support for Accutrac XE 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 Accutrac XE 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 **Accutrac XE**.
5. Click **OK** to save your changes.

   Now when you start AccuRoute Desktop, Accutrac XE 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.

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Section 5: Optional Server Configuration

This section includes:

Changing the label of a document (5-1)

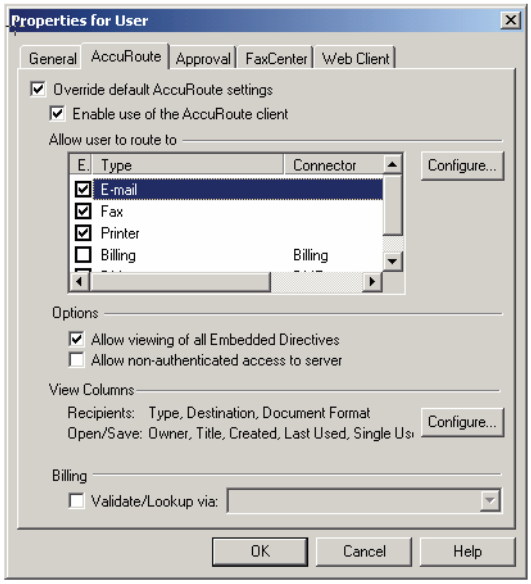
Changing the label of a document

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 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.

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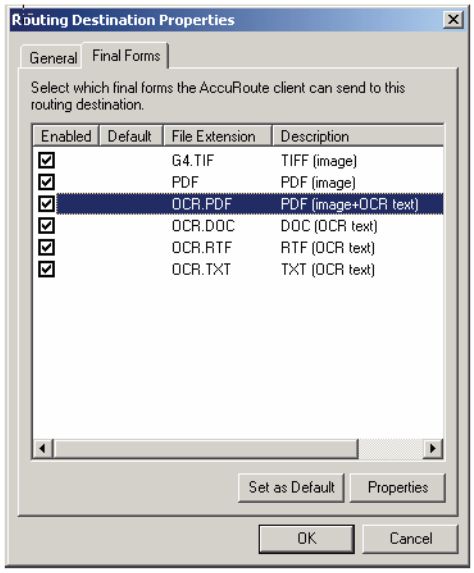
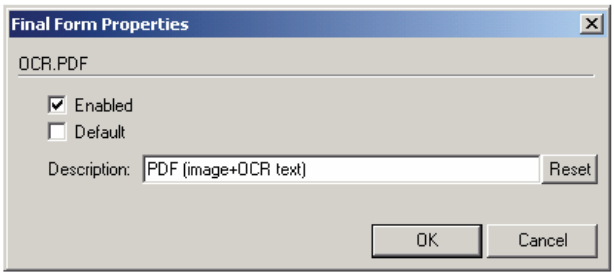
5 Highlight the document type that needs to be modified.



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.

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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

When configuring clients, the WORLDOX User Code can be any user.

To add WORLDOX functionality to AccuRoute Desktop:

1. Start AccuRoute Desktop and log in.
2. Click **Tools** on the menu bar and select **Configure DMS**.
3. Select **Worldox** from the menu that appears. The Worldox Configuration window appears.

At this point, the configuration is identical to that of the connector configuration. Perform steps one through seven in Configuring a new WORLDOX connector (3-5).

Continue to Configuring FaxCenter.

Configuring FaxCenter

Note When configuring clients, the WORLDOX User Code can be any user.

To add WORLDOX functionality to the 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 **Worldox** and click **Configure**. The Worldox Configuration screen appears.
4. At this point, the configuration is identical to that of the connector configuration. Perform steps one through six in Configuring a new WORLDOX connector (3-5).
5. Click **OK**.

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Configuring Swiftwriter

Note When configuring clients, the WORLDOX User Code can be any user.

To add WORLDOX functionality to the Swiftwriter:

1. Start the Swiftwriter Configuration application in the Control Panel[1]. The Swiftwriter Configuration screen appears.
2. Click **Worldox** in the list so that the option text is highlighted and click **Properties**. The Worldox Configuration screen appears.
3. At this point, the configuration is identical to that of the connector configuration. Perform steps one through six in Configuring a new WORLDOX connector (3-5).
4. Select **Worldox** and click **Apply**.
5. Click **OK**.

Client deployment methods

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

- Configure AccuRoute Desktop or FaxCenter tto support WORLDOX 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 Configuring WORLDOX for client rollout. below
- Install AccuRoute Desktop or FaxCenter on each individual workstation and perform the configuration steps for WORLDOX manually. Continue to Configuring WORLDOX manually.

Configuring WORLDOX 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 WORLDOX manually after you install AccuRoute Desktop or FaxCenter.

To pre-configure the Omtool DMS Libraries for deployment using AccuRoute Desktop:

1. Install AccuRoute Desktop v4.1 (or higher) on a workstation.
2. Configure the Omtool DMS Libraries to support WORLDOX. Select the settings that should apply to all workstations in your environment.
3. Go to the ...\Program Files\Common Files\Omtool directory on the workstation where AccuRoute Desktop is installed, and copy the **OmDMSDB.xml** file to the clipboard.
4. Go to the Omtool server where AccuRoute Desktop setup files are located, and paste the file to the following location. When prompted to replace the existing file, click **Yes**.

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

1. If you cannot access the Control Panel, consult a network administrator. Access to the Control Panel might be disabled.

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You have pre-configured the Omtool DMS Libraries setup with the configuration data for WORLDOX. When you are ready to deploy WORLDOX, launch setup.exe in the AccuRouteDesktop4.1 directory.

Configuring WORLDOX manually

To configure WORLDOX 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 WORLDOX message, enable billing on the WORLDOX 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 WORLDOX connector:

1. Click **CONNECTORS** in the console tree, and double-click the **WORLDOX** 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).

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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 Enabling billing for registered users (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 Automatic billing entry (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 or higher
- AccuRoute Desktop v4.1 or higher

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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.

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Section 8: Testing

This section includes:

Sending a message to WORLDOX using AccuRoute Desktop (8-1)

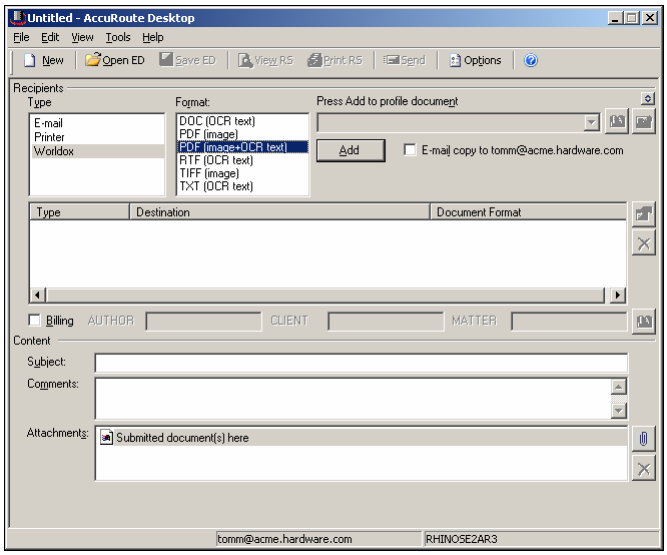
To test the installation and configuration of Omtool DMS Libraries v4.1 for WORLDOX, send a message using AccuRoute Desktop.

For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to Related AccuRoute v4.1 documentation on 1-3.

Sending a message to WORLDOX using AccuRoute Desktop

To send a message to WORLDOX 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 **WORLDOX** 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.

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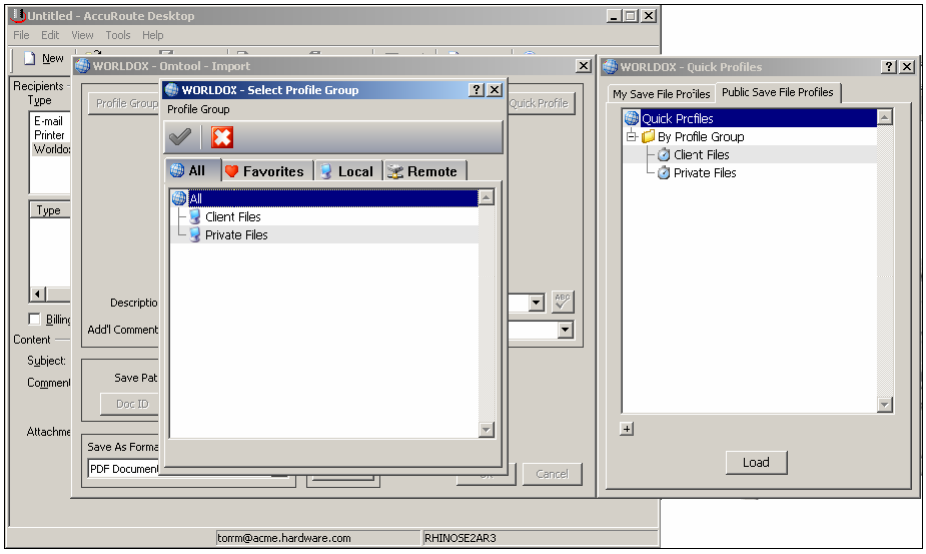
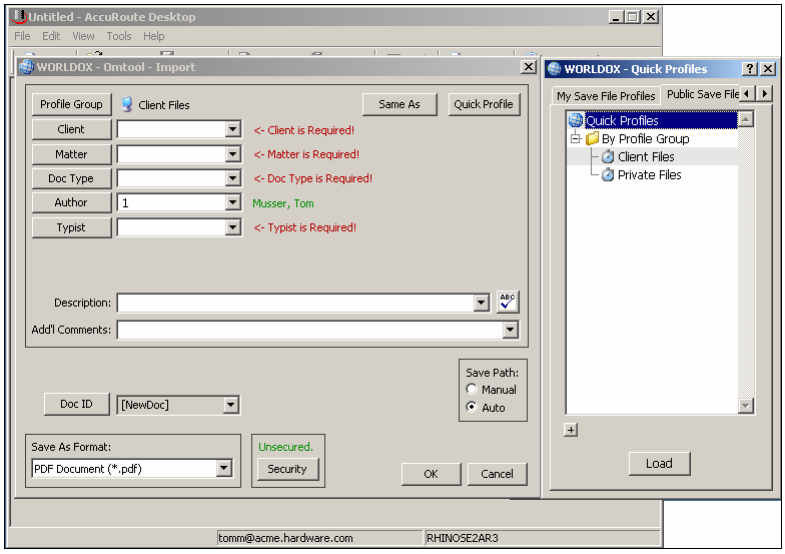
3 Click **Add**. The WORLDOX - Select Profile Group window appears.



4 Select the appropriate WORLDOX Profile Group. The WORLDOX - Omtool - Import window appears.



Do not select a Private Profile Group. Doing so will store the document on your local workstation rather than on the network.

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

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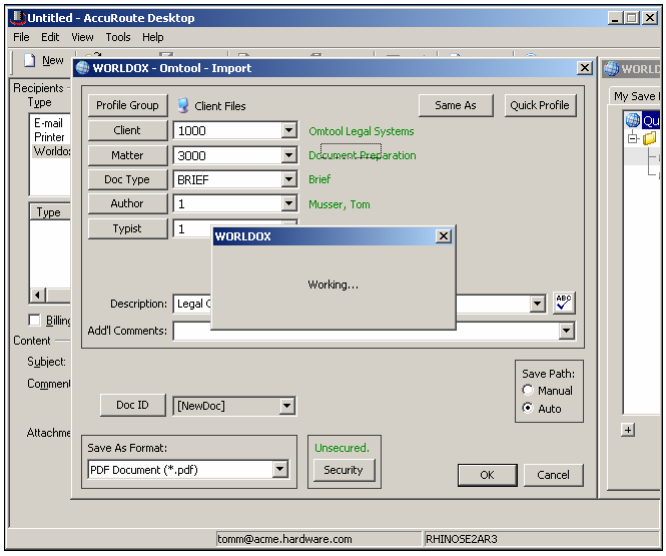
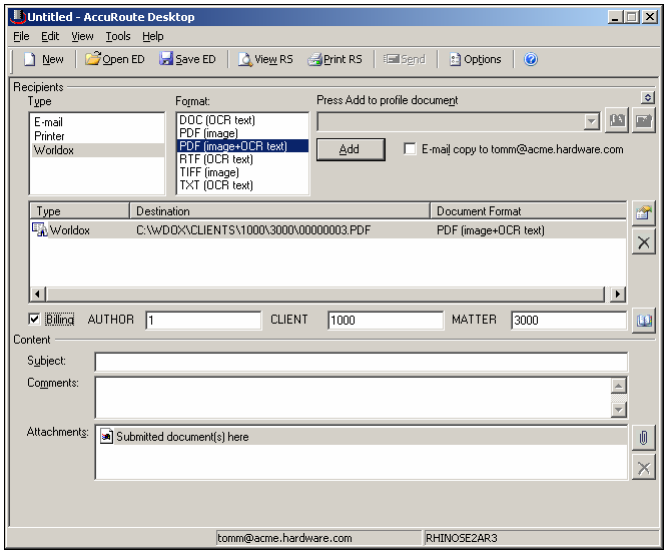
5 Complete the WORLDOX - Omtool - Import window and click **OK**.



When the upload is complete, a destination appears in the message.



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

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.

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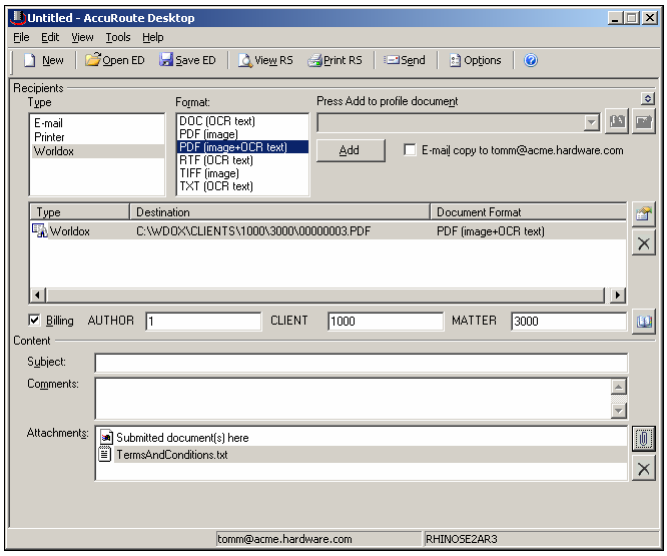
Web document - Select this option to attach a web page from the Internet. Type the address of the web document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML), and click **OK**.



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.)

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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 (9-3)

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

For information on troubleshooting WORLDOX, consult WORLDOX'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:

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- 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:

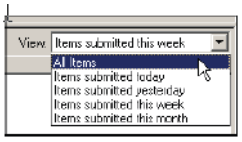
1 Start the Administrator.

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**.



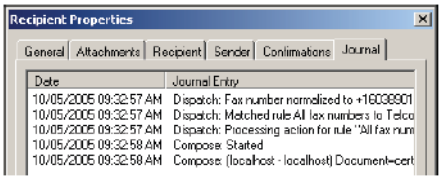
c Sort all items by the date submitted.

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**.

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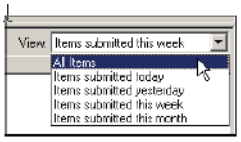
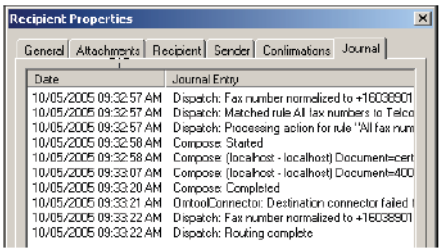


c Sort all items by the date submitted.

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 Omtool support and sales 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 WORLDOX successfully. Do some advanced troubleshooting on WORLDOX to determine why the message is not being delivered to its destination. Contact Omtool if you are unable to resolve the issue. (Go to Omtool support and sales 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 Troubleshooting the multifunction device.

Troubleshooting the multifunction device

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

Continue to Troubleshooting the client.

Troubleshooting the client

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

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