

---

# Omtool DMS Libraries Installation and Integration Guide for NetDocuments®

June 2015



**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>

© 2015 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute, Genifax, Image-In, ObjectArchive, ScanFacts, and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Omtool product documentation is provided as part of the licensed product. As such, the documentation is subject to the terms outlined in the End User License Agreement. (You are presented with the End User License Agreement during the product installation. By installing the product, you consent to the terms therein.)

Permission to use the documentation is granted, provided that this copyright notice appears in all copies, use of the documentation is for informational and non-commercial or personal use only and will not be copied or posted on any network computer or broadcast in any media, and no modifications to the documentation are made. Accredited educational institutions may download and reproduce the documentation for distribution in the classroom. Distribution outside the classroom requires express written permission. Use for any other purpose is expressly prohibited by law.

Omtool and/or its suppliers make no guaranties, express or implied, about the information contained in the documentation. Documents and graphics contained therein could include typographical errors and technical inaccuracies. Omtool may make improvements or changes to the documentation and its associated product at any time.

## 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](mailto:customerservice@omtool.com) or [support@omtool.com](mailto:support@omtool.com)

Technical support requires an active support contract. For more information, go to <http://w3.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](mailto:sales@omtool.com)

# Contents

## Section 1: Introduction

Omtool DMS Libraries for NetDocuments.....	1-1
Workflow configurations .....	1-1
Installation components .....	1-2
Deployment summary .....	1-2
Related AccuRoute 5.0 documentation .....	1-3

## Section 2: Requirements

Server requirements.....	2-1
Adding licenses.....	2-1
Automatic license activation.....	2-2
Manual license activation.....	2-2

## Section 3: Installation

Adding the NetDocuments connector .....	3-1
Configuring the NetDocuments connector .....	3-2
Creating an Outbound Routing Rule to use with native NetDocuments Cover Sheets for the NetDocuments Connector.....	3-3

## Section 4: Workflow Overview and Configuration

NetDocuments workflow scenarios.....	4-1
Working with a single-use document scan process.....	4-1
Working with a multiple document scan process.....	4-1
Configuration for single document scanning.....	4-2
Configuration for multiple document scanning.....	4-2
Creating a default profile for multiple document scanning .....	4-2
Creating the routing rule that uses the Default Profile: .....	4-2

## Section 5: Additional Configuration

Routing Documents to a NetDocuments Cabinet Using the NetDocuments Volume List .....	5-1
Configuring document routing using the NetDocuments Volume List.....	5-1
Creating a Volume List for NetDocuments .....	5-2
Creating a default profile for multiple document scanning.....	5-2
Creating the routing rule that uses the Default Profile: .....	5-3
Creating the AccuRoute Connector for Volume List.....	5-3
Creating an Outbound Routing Rule for the NetDocuments Volume List .....	5-4

## Section 6: Troubleshooting

Detecting workflow issues.....	6-1
Troubleshooting the delivery mechanism .....	6-1
Troubleshooting the message on the Omtool server .....	6-1
Troubleshooting the multifunction device .....	6-3
Troubleshooting the client.....	6-4

# Section I: Introduction

This guide contains instructions on deploying Omtool DMS Libraries v5.0 for NetDocuments®. It is written for systems administrators with detailed knowledge of the Omtool AccuRoute server and NetDocuments.

This section includes:

[Omtool DMS Libraries for NetDocuments](#) (I-1)

[Workflow configurations](#) (I-1)

[Installation components](#) (I-2)

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

[Related AccuRoute 5.0 documentation](#) (I-3)

---

## Omtool DMS Libraries for NetDocuments

Omtool DMS Libraries v5.0 includes the ability to integrate with NetDocuments.

Integration with NetDocuments provides an expanded capability for the AccuRoute Server to route documents to the NetDocuments Cabinet using the AccuRoute Connector for NetDocuments with the NetDocuments native routing page. Another option is using the NetDocuments Volume List. These two methods are summarized below.

NetDocuments is a Web-based Document Management System (DMS). For more information, see <http://www.netdocuments.com>.

### Workflow configurations

The following workflow configurations are available to route your documents to a NetDocuments Cabinet:

- [Using the native NetDocuments Cover Sheet to route documents to NetDocuments](#) (I-1)
- [Using the NetDocuments Volume List](#) (I-2)

These configurations are discussed in more detail in [Section 4: Workflow Overview and Configuration](#) (4-1).

### Using the native NetDocuments Cover Sheet to route documents to NetDocuments

In this workflow method, when the user generates a NetDocuments Cover Sheet, a placeholder is created in the NetDocuments cabinet, either at the Document level (for single scans), or at the Folder level (for multiple scans). Users can scan a document at a multifunction device using the Cover Sheet page as the first page and the document is sent to the AccuRoute Server for processing. The Barcode Extractor component extracts routing information from the barcode of the Cover Sheet page. The AccuRoute Server uses that information to route the document to the NetDocuments cabinet, where the document replaces the placeholder for storage.

---

**Important** This method requires an additional license for the Barcode Extractor component.

---

## Using the NetDocuments Volume List

To leverage the Volume List Extensions capability, you can use the AccuRoute Server Administrator to configure a workflow in which documents matching an outbound rule are sent to the NetDocuments Volume List. From there the documents are automatically routed to the NetDocuments cabinet using the Default Profile information.

This method of document routing is useful for situations in which there is no access to the NetDocuments User Interface and therefore, the user cannot generate a Cover Sheet page. For more information on the Volume List Extension feature, consult the [AccuRoute Server Administrator Help](#).

---

**Important** This method requires an additional license for the AccuRoute Connector for Volume List.

---

## Installation components

Omtool DMS Libraries v5.0 is included in the AccuRoute v5.0 and higher installation.

---

**Note** The instructions in this guide are applicable only if you are running Omtool DMS Libraries v5.0

---

## Deployment summary

### To deploy Omtool DMS Libraries v5.0 for NetDocuments:

- 1 Review and complete the installation requirements. (Go to [Section 2: Requirements](#).)
- 2 Complete the NetDocuments connector installation. (Go to [Section 3: Installation](#).)
- 3 Complete the required server configuration. (Go to [Section 4: Workflow Overview and Configuration](#).)
- 4 Complete optional server configuration. (Go to [Section 5: Additional Configuration](#).)
- 5 Test profiling a document into NetDocuments. (Go to [Section 6: Testing](#).)
- 6 Troubleshoot the installation. (Go to [Section 6: Troubleshooting](#).)

## Related AccuRoute 5.0 documentation

For more information about Omtool DMS Libraries v5.0 and other AccuRoute products, refer to the [AccuRoute v5.0 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)

[Adding licenses](#) (2-1)

---

### Server requirements

The system where you install the DMS Connector for NetDocuments must meet the following minimum requirements:

- AccuRoute Server v5.0 or higher

---

**Note** Currently, the Omtool DMS Libraries v5.0 are only available with the AccuRoute v5.0 server and client installations.

---

- DMS connector license
- Barcode Extractor license
- Workflow Volume license (only required if you are using a Volume List workflow)

---

### Adding licenses

---

**Note** The AccuRoute NetDocuments Connector requires a license. For more information, contact Omtool Sales.

---

You can activate the licenses 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.



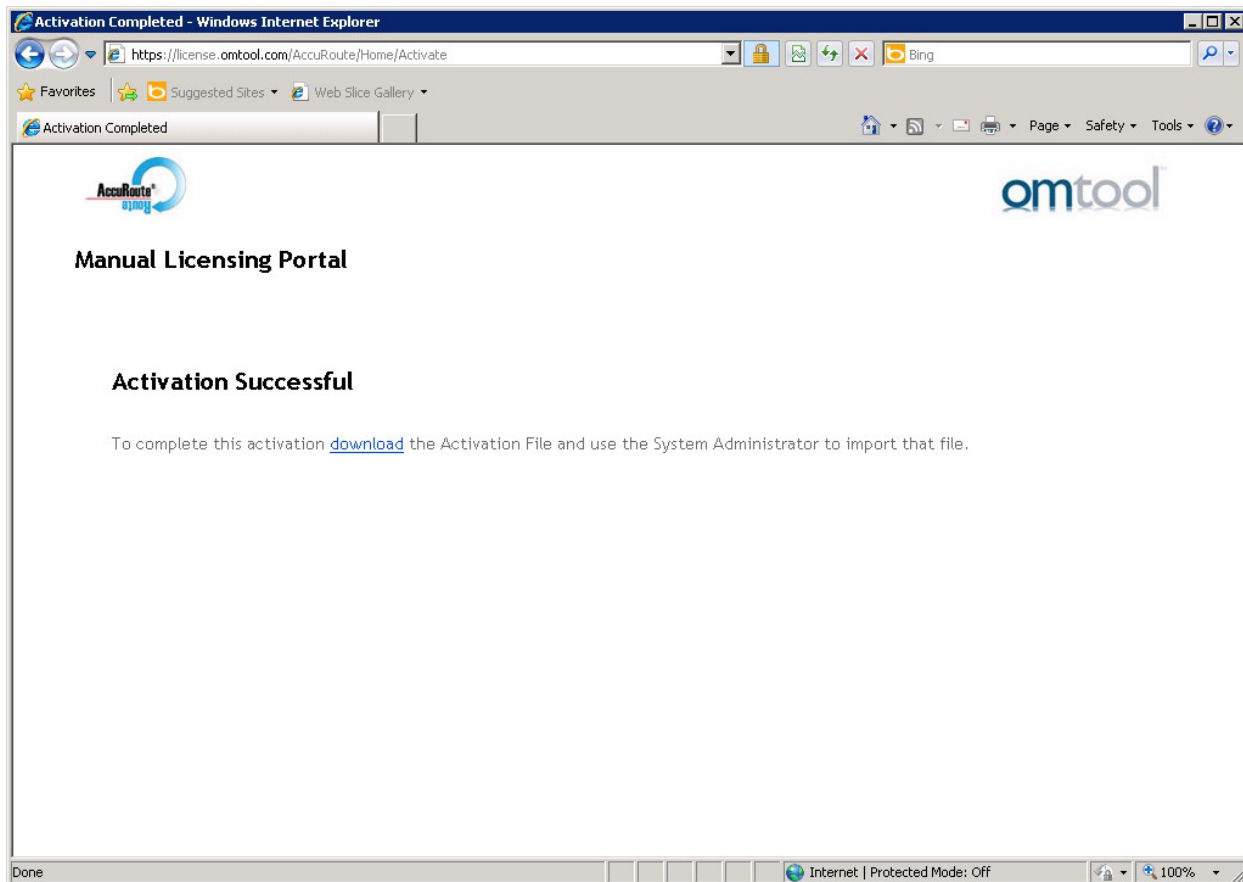
## Manual Licensing Portal

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"/> Deactitvate License
Exported Activation File:	<input type="text"/> <input type="button" value="Browse..."/>
<input type="button" value="NEXT &gt;"/>	

- 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.

## Section 3: Installation

This section includes:

[Adding the NetDocuments connector](#) (3-1)

[Configuring the NetDocuments connector](#) (3-2)

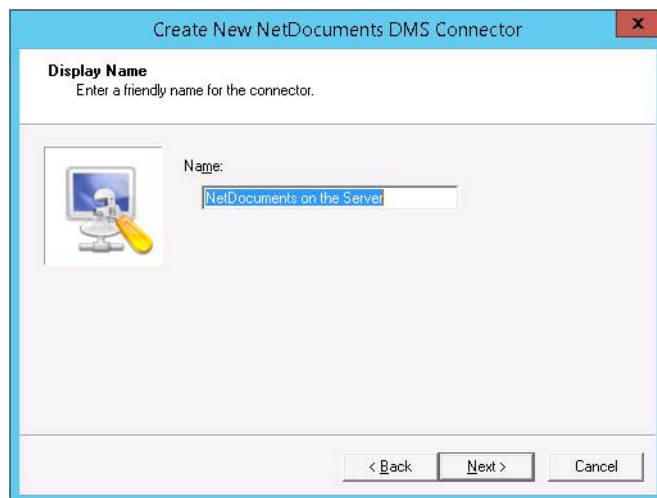
[Creating an Outbound Routing Rule to use with native NetDocuments Cover Sheets for the NetDocuments Connector](#) (3-3)

---

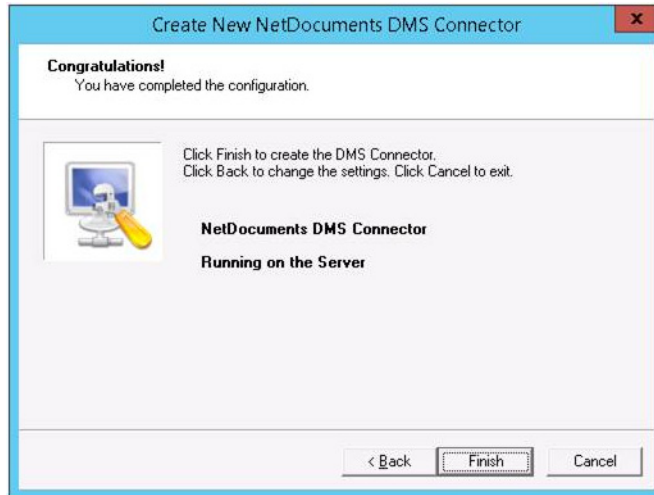
### Adding the NetDocuments connector

**To add a new NetDocuments connector to an AccuRoute server:**

- 1 Right-click **Connectors** in the console tree and select **New AccuRoute Server connector for > NetDocuments**. 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 select **Remote Server**, enter the name of the server. Click **Next**. The **Display Name** screen appears.



- 3 **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** screen appears.



- 4 Click **Finish**.

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

Continue to [Configuring the NetDocuments connector](#).

## Configuring the NetDocuments connector

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

**To complete the configuration wizard for a new NetDocuments connector:**

- 1 Enter the NetDocuments cabinet name in the **Cabinet name** text box.
- 2 Click **Next**. The **NetDocuments Login Configuration** window appears.

- 3 Enter the Cabinet **credentials** options:
  - ▲ **Cabinet name**
  - ▲ **User name**
  - ▲ **Password**
  - ▲ **Confirm password**
- 4 Click **Finish** to complete the connector configuration.

---

## Creating an Outbound Routing Rule to use with native NetDocuments Cover Sheets for the NetDocuments Connector

Use the steps below to create the following outbound rule:

If destination is Email address is NetdocsA@yourcompany.com. then route to the AccuRoute Connector for NetDocuments.

---

**Note** The email address above is an example for this scenario.

---

### To create the outbound rule:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 Expand the console tree and click **Rules > Outbound > New > Rule**. The **Create New Rule** wizard appears.
- 3 Click **Add** and from the **Add Criteria Rule** list, select **Where Destination is an e-mail address**. Click **Next**.
- 4 On the **Items to Match** page, verify that the **is** option is selected. Enter [NetdocsA@yourcompany.com](mailto:NetdocsA@yourcompany.com) in the text box below and click **Add**.
- 5 Click **Finish** to close the **Items to Match** page.
- 6 Click **Next** to open the **Specify the Actions to take for this Rule** page.
- 7 Click **Add** to open the **Add Rule Action** page and select the **Route to Connector** option.
- 8 Click **Next** to open the **Route to Connector** page.
- 9 At the **Route to Connector** option, select **AccuRoute Connector for NetDocs** from the drop-down menu.
- 10 At the **Document Delivery Format** option, select **PDF** from the drop-down menu.
- 11 De-select the **Allow sender to override the Delivery Format** option.
- 12 Click **Advanced** to set the Core property value. The **Advanced Routing Options** page opens.
- 13 Click **Custom Properties**. The **DMS Rule Properties** page appears.

- I4** Select **Core Properties** and click **Add**. The **Core Property** page appears.
- I5** In the **Name** text box, enter `prDataExtraction`. In the **Value** text box, enter `3`.
- I6** Click **OK, OK, OK** and **Finish** to close the **Route to Connector** page.
- I7** Click **Next** and then **Finish** to create the rule.

This rule uses the **Data Extractor** component to identify the document import location and route the document to the correct placeholder location via the AccuRoute Server.



# Section 4: Workflow Overview and Configuration

This section provides overviews of two different types of workflow, both in environments using the Omtool DMS Libraries for NetDocuments. One describes working with a single document that will be stored in Paper Document, the other describes working with multiple documents that will be stored in a folder.

This section also describes NetDocuments and AccuRoute server configurations required to use these workflows in coordination with the Omtool NetDocuments connector.

This section includes:

[NetDocuments workflow scenarios](#) (4-1)

[Configuration for single document scanning](#) (4-2)

[Configuration for multiple document scanning](#) (4-2)

---

## NetDocuments workflow scenarios

The following overviews describe two kinds of use cases:

- 1 A single document sent to Paper Document
- 2 Multiple documents sent to a folder

### Working with a single-use document scan process

In preparation for processing any single document, the user will need to create a one-time use Cover Sheet to scan with the document from the NetDocuments user interface. The user then takes both the native Cover Sheet and the document to the device for scanning. The system uses the Cover Sheet to determine how to process the document, which in this case would be to replace the pending NetDocuments Paper Document template with the scanned document.

### Working with a multiple document scan process

In preparation for processing multiple documents in an ongoing basis, the user will also need a Cover Sheet. In this scenario, documents are sent to an existing Folder. To accomplish this requires that the Folder be set up and a Default Profile configured. Once the folder is set up, a Default Profile is configured, and a cover sheet is produced, the user can proceed to scan their documents. The system uses the cover sheet to determine how to process the document, in this case, sending it to a specific folder in accordance with the associated profile.

---

## Configuration for single document scanning

**To create a native NetDocuments Cover Sheet and configure the process for an input document:**

- 1 Login to NetDocuments and select **Folder**.
- 2 Select **Add Document > Paper document**. The **Create a Profile for a Paper Document** screen appears.
- 3 Enter the new name for the document in the **Document name** text box.
- 4 Select the **Folder** of interest in which you want it stored.
- 5 Check that the **Print profile cover sheet** check box is selected and click **OK**.  
You can now either **Print the Cover Sheet** or **Save the PDF image** (if you have a PDF printer).

---

## Configuration for multiple document scanning

### Creating a default profile for multiple document scanning

To use the multiple document scanning process, which sends documents to a folder, you need to create a Default Profile. When you create the Default Profile, it is specific to a document location, not the Folder location.

**To create a Default Profile:**

- 1 Launch the MMC AccuRoute Administrator console.
- 2 Select **Connectors > Netdocuments properties**.
- 3 In the **Advanced** tab, go to the **Default Profile Information** section and select **Create**.
- 4 Complete the **Default Profile** for the Document level destination and save the XML file to a known location.

### Creating the routing rule that uses the Default Profile:

In the routing rule, you need to modify the **Default Profile Core Property** value for ([prDMSDocIdentification](#)) to be the value of the NetDocuments "FOLDER" ID from the location where the document was created. Otherwise, all but the very first document routed using the Default Profile information will fail.

**To create the Routing Rule that uses the Default Profile:**

- 1 Launch the MMC AccuRoute Administrator console.
- 2 Expand **Rules > Outbound Rules**.
- 3 Right-click **Outbound Rules**, and select **New > Rule**.
- 4 Specify the **Criteria** and **Action** with which to match the documents.

- 5 In the Action, select **Connectors > NetDocuments**, and choose the file extension to be used for importing the routed documents. Then click the **Advanced** button.
- 6 Select the **Set Additional Job Properties** button, and then the **Import** button.
- 7 Browse to the .xml file of the saved Default Profile from the NetDocuments connector.
- 8 Click **Open, OK, Finish**, and then **Next** and **Finish** to complete the rule.

In addition, you must manually configure the **Client** and **Matter** properties.

**To modify the Rule to use the FolderID:**

- 1 Login to the NetDocuments User Interface and navigate to the folder destination.
- 2 Click **Properties** and copy the FOLDER ID. In this example, assume the value of FOLDER ID is [4832-4200-1417](#).
- 3 Open the **DMS Rule Properties** page for the **Default Profile**.
- 4 Go to the **Core Properties** page.
- 5 Select the [PrDMSDocIdentification](#) property and click the **Properties** tab. The **Core Property** page opens, listing the property and its value.
- 6 In the **Value** text box, enter the new value: [4832-4200-1417](#).
- 7 Click **OK** to save your changes.
- 8 Go to your NetDocuments vault and verify that the new value you added appears as the Folder email address: [4832-4200-1417@mail.vault.netdocuments.com](mailto:4832-4200-1417@mail.vault.netdocuments.com)
- 9 Click **OK** to save the changes.

Section 4: Workflow Overview and Configuration

# Section 5: Additional Configuration

This section includes:

[Routing Documents to a NetDocuments Cabinet Using the NetDocuments Volume List](#) (5-1)

[Configuring document routing using the NetDocuments Volume List](#) (5-1)

---

## Routing Documents to a NetDocuments Cabinet Using the NetDocuments Volume List

Leveraging the Volume List Extensions capability, the AccuRoute Administrator can configure a workflow where documents matching an outbound rule are sent to the NetDocuments Volume List from where they are automatically routed to the NetDocuments cabinet using the Default Profile information.

This method of document routing is useful in situations where there is no access to the NetDocuments User Interface and therefore, the user cannot generate a Cover Sheet page. For more information on Volume List Extension feature, consult the [AccuRoute Server Administrator Help](#).

Alternately, route documents using the NetDocuments Cover Sheet where the Barcode Extractor component is enabled to route documents to specific locations in the NetDocuments User Interface through the NetDocuments Volume List.

---

## Configuring document routing using the NetDocuments Volume List

The AccuRoute Server supports Volume Lists for the NetDocuments DMS cabinet. Configuring your system to use Volume List Extensions involves:

- [Creating a Volume List for NetDocuments](#) (5-2)
- [Creating a default profile for multiple document scanning](#) (5-2)
- [Creating the routing rule that uses the Default Profile](#): (5-3)
- [Creating the AccuRoute Connector for Volume List](#) (5-3)
- [Creating an Outbound Routing Rule for the NetDocuments Volume List](#) (5-4)

---

**Important** The **AccuRoute Connector for Volume List** requires an additional license. For more information, contact [Omtool Sales](#).

---

## Creating a Volume List for NetDocuments

### To create the Volume List:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 1 In the console tree, expand the **AccuRoute Server**.
- 2 Right-click **Volume Lists > New Volume List** and select **NetDocuments**. The **Volume List License** page opens.
- 3 In the **License** text box, add the license and click **OK**. The server validates the license and the **Volume List Property** page, with the DMS name, appears.
- 4 To configure the NetDocuments login configuration, click **Configure**.
  - a In the **Cabinet name** text box, enter the NetDocuments cabinet name.
  - b In the **User name** text box, enter the email id of the user whose login credentials are being entered.
  - c In the **Password** and **Confirm** password text boxes, enter the password for the user.
  - d Click **Finish** to complete the login configuration.
- 5 In the **Default Profile Information** section, create a **Default Profile**. This configuration is necessary as it is the basis for how and where items will be stored into the NetDocuments DMS.

---

**Note** You will not be able to click **OK** and close the **Property** dialog until you have configured the DMS and finish [Creating a default profile for multiple document scanning \(5-2\)](#).

---

- a Click **New**. The Internet Explorer browser opens to the NetDocuments login page.
  - b Provide the login credentials to login. The **Import Scan Document** page opens.
  - c In the **Name** text box, enter name of the stub document.
  - d Verify that the cabinet name is the name you specified in step 4.
  - e Select the folder/subfolder where you plan to create the stub document.
  - f Click **OK**.
- 6 Click **OK** on the **Volume List Property** page to create the Volume List.

## Creating a default profile for multiple document scanning

To use the multiple document scanning process, which sends documents to a folder, you need to create a Default Profile. When you create the Default Profile, it is specific to a document location, not the Folder location.

### To create a Default Profile:

- 1 Launch the MMC AccuRoute Administrator console.
- 2 Select **Connectors > Netdocuments properties**.
- 3 In the **Advanced** tab, go to the **Default Profile Information** section and select **Create**.
- 4 Complete the **Default Profile** for the Document level destination and save the XML file to a known location.

## Creating the routing rule that uses the Default Profile:

In the routing rule, you need to modify the **Default Profile Core Property** value for (`prDMSDocIdentification`) to be the value of the NetDocuments "FOLDER" ID from the location where the document was created. Otherwise, all but the very first document routed using the Default Profile information will fail.

### To create the Routing Rule that uses the Default Profile:

- 1 Launch the MMC AccuRoute Administrator console.
- 2 Expand **Rules > Outbound Rules**.
- 3 Right-click **Outbound Rules**, and select **New > Rule**.
- 4 Specify the **Criteria** and **Action** with which to match the documents.
- 5 In the Action, select **Connectors > NetDocuments**, and choose the file extension to be used for importing the routed documents. Then click the **Advanced** button.
- 6 Select the **Set Additional Job Properties** button, and then the **Import** button.
- 7 Browse to the .xml file of the saved Default Profile from the NetDocuments connector.
- 8 Click **Open**, **OK**, **Finish**, and then **Next** and **Finish** to complete the rule.

In addition, you must manually configure the **Client** and **Matter** properties.

### To modify the Rule to use the FolderID:

- 1 Login to the NetDocuments User Interface and navigate to the folder destination.
- 2 Click **Properties** and copy the FOLDER ID. In this example, assume the value of FOLDER ID is `4832-4200-1417`.
- 3 Open the **DMS Rule Properties** page for the **Default Profile**.
- 4 Go to the **Core Properties** page.
- 5 Select the `PrDMSDocIdentification` property and click the **Properties** tab. The **Core Property** page opens, listing the property and its value.
- 6 In the **Value** text box, enter the new value: `4832-4200-1417`.
- 7 Click **OK** to save your changes.
- 8 Go to your NetDocuments vault and verify that the new value you added appears as the Folder email address: `4832-4200-1417@mail.vault.netdocuments.com`
- 9 Click **OK** to save the changes.

## Creating the AccuRoute Connector for Volume List

### To add the AccuRoute Connector for Volume List:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, expand the AccuRoute Server and right-click **Connectors**.
- 3 Select **New AccuRoute Connector for > Volume List**. The **Server Address** page opens.

- 4 Click **Next**. The **Display Name** page appears.
- 5 Enter an appropriate name for the connector or keep the default **Volume List on the Server**.
- 6 Click **Next**. The **Select Volume List** page appears.
- 7 Select the **Volume List** to which the documents should be routed and stored.
- 8 Click **Next**. The configuration is now complete and the **Congratulations** page appears.
- 9 Click **Finish**. The connector now appears in the details pane.

## Creating an Outbound Routing Rule for the NetDocuments Volume List

Use the steps below to create the following outbound rule:

If destination is Email address is NetDocsB@yourcompany.com, then route to the AccuRoute Connector for Volume List.

**Note** The destination specified must be a unique attribute for the documents intended to route to the AccuRoute Connector for Volume List. The email address above is an example for this scenario.

### To create the outbound rule:

- 1 Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
- 2 In the console tree, click **Rules > Outbound > New > Rule**. The **Create New Rule** wizard opens.
- 3 Click **Add** and from the **Add Criteria Rule** list, select **Where Destination is an E-mail Address**. Click **Next**.
- 4 On the **Items to Match** page, verify the **is** option is selected. Enter [NetDocsB@yourcompany.com](mailto:NetDocsB@yourcompany.com) in the text box below and click **Add**.
- 5 Click **Finish** to close the **Items to Match** page.
- 6 Click **Next** to open the **Specify the Actions to take for this Rule** page.
- 7 Click **Add** to open the **Add Rule Action** page and select the **Route to Connector** option.
- 8 Click **Next** to open the **Route to Connector** page.
- 9 For the **Route to Connector** option, select the **AccuRoute Connector for Volume List** from the drop-down menu.
- 10 Go to the **Document Delivery Format** option and select **PDF** from the drop-down menu.
- 11 Click **Finish**, **Next**, **Next** and **Finish** to create the rule.

**Note** If using Cover Sheets, configure the `prDataExtraction` property for this rule by following steps 12-15 of [Creating an Outbound Routing Rule to use with native NetDocuments Cover Sheets for the NetDocuments Connector \(3-3\)](#). Also note, to use this feature, you need the **Data Extractor** to be licensed and enabled.



# Section 6: Troubleshooting

This section includes:

[Detecting workflow issues](#) (6-1)

[Troubleshooting the delivery mechanism](#) (6-1)

[Troubleshooting the message on the Omtool server](#) (6-1)

[Troubleshooting the multifunction device](#) (6-3)

[Troubleshooting the client](#) (6-4)

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

For information on troubleshooting NetDocuments, consult NetDocuments'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:

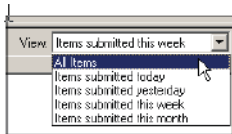
## Section 6: Troubleshooting

- 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:**

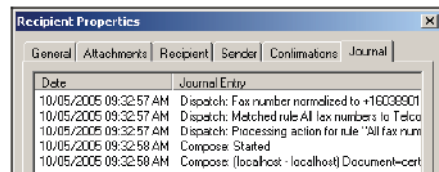
- 1 Start the Administrator.
- 2 Go to **Omtool Server Administrator > [ServerName] > Messages**.
- 3 Look for the message in the In Process queue:
  - a Click **In Process**.
  - b View **All Items**.



- 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.

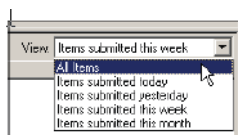
**Note** If you open the Journal while the message is still processing, you need to close the Journal properties before the Journal will update.

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

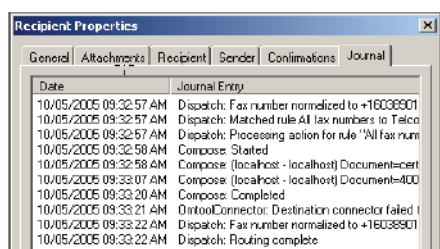


- **Message not found** - Go to step 4 and look for the message in the History queue.

- 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 [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 NetDocuments successfully. Do some advanced troubleshooting on NetDocuments 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

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