
Omtool DMS Libraries v2.2 installation guide for Billing Provider

For AccuRoute v2.1

December 18, 2006 (4.0324-AA)



Omtool, Ltd.

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

Omtool Europe

25 Southampton Buildings
London
WC2A 1AL
United Kingdom
Phone: +44(0) 203 043 8580
Toll-free in the UK: +44(0) 800 011 2981
Fax: +44(0) 203 043 8581

Web: <http://www.omtool.com>

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Section I: Introduction

This guide contains instructions on deploying Omtool DMS Libraries v2.2 for Billing Provider. It is written for systems administrators with detailed knowledge of the Omtool server and Billing Provider.

This section includes:

[Billing Provider](#) (1-1)

[Installation components](#) (1-2)

[Deployment summary](#) (1-2)

[Release notes](#) (1-2)

[Related documentation](#) (1-3)

Billing Provider

Billing Provider is a DMS connector that allows you to lookup and validate billing fields against any database that is ADO or ODBC compatible. It does not support DMS profiling and is used solely to lookup and validate AccuRoute Desktop's billing fields.

Important User credentials can be specified in the DSN. If they are not found in the DSN, then the Windows user must have read access to the database in order to use this feature.

Billing Provider supports up to three billing fields, which are added one at a time. Moving these fields up and down the list in the configuration window allows you to define their display order in AccuRoute Desktop, as well as the order of lookups. For example, if you add the fields Matter, Billing, and Client in that order, but want them to appear as Client, Matter, and Billing in AccuRoute Desktop, move Client up the list until it appears before Matter. If the field has a parent field, then the parent field will be looked up before the child field, no matter what the display order is in AccuRoute Desktop.

You can optionally select any field to be a parent. A parent field restricts the information that you can pick from child fields. For example, if the Client field is a parent, then you are only allowed to select Matter fields that are valid for the Client number you selected.

Because you can set each column up with completely different DSN configurations, you can have a separate database for each column.

Note Both the server and client machines must have Microsoft MDAC libraries installed and DSN configured when DSN is used in the connection string.

For more information on profiling documents to Billing Provider, go to [Section 5: Testing and troubleshooting](#).

Installation components

Omtool DMS Libraries v2.2 is installed when you apply the AccuRoute Desktop v2.2 Update to the Omtool server.

Deployment summary

To deploy Omtool DMS Libraries v2.2 for Billing Provider:

- 1 Complete the installation requirements. (Go to [Section 3: Installation](#).)
- 2 Complete any optional server configuration. (Go to [Section 4: Optional billing configuration](#).)
- 3 Test Billing Provider. (Go to [Section 5: Testing and troubleshooting](#).)

Release notes

Enhancements

Omtool DMS Libraries v2.2 for Billing Provider includes the following enhancements:

Omtool DMS Libraries v2.2 for Billing Provider has been qualified with AccuRoute Desktop v2.2.

Resolutions

Omtool DMS Libraries v2.2 for Billing Provider does not include any resolved issues:

Limitations

Omtool DMS Libraries v2.2 for Billing Provider includes the following limitations:

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.

Never open, edit, or delete a placeholder in a DMS application: When an AccuRoute Desktop user creates a Routing Sheet for a document that should be routed to your company's DMS application, the Omtool DMS Libraries invoke the DMS application and creates a placeholder for the document. When the AccuRoute server

routes the actual document to the DMS application, the DMS application overwrites the placeholder with the actual document. Never open, edit, or delete this placeholder.

Related documentation

- AccuRoute Desktop installation guide - <http://www.omtool.com/documentation/AccuRoute/v22/AccuRouteDesktop/AccuRouteDesktopV22InstallGuide.pdf>
- AccuRoute Desktop users guide - <http://www.omtool.com/documentation/AccuRoute/v22/AccuRouteDesktop/AccuRouteDesktopV22UserGuide.pdf>
- Administrator help - <http://www.omtool.com/documentation/omtoolserver/v331/admin/>

Section 2: Requirements

This section includes:

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

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

Server requirements

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

- AccuRoute v2.1
- The Billing Provider client software must be installed and running during the Omtool DMS Libraries configuration. Additionally, the workstation running Billing Provider must be connected to the file server where Billing Provider has been installed. The connection must be by means of a consistent drive letter mapping or via UNC.
- Tier 1 DMS connector license
- AccuRoute Desktop v2.2 Update, which includes DMS Libraries v2.2, must be applied to the server.
- Both the server and client machines must have Microsoft MDAC libraries installed and DSN configured when DSN is used in the connection string.

Important On the AccuRoute Server Administrator, you must not select Billing as a "route to" type on the AccuRoute tab in the Registered users properties for user defaults or individual users.

Client requirements

The system where you install the Billing Provider must meet the following minimum requirement:

- AccuRoute Desktop v2.2 or higher
- Both the server and client machines must have Microsoft MDAC libraries installed and DSN configured when DSN is used in the connection string.

There is no additional client configuration for Billing Provider.

Section 2: Requirements

Section 3: Installation

This section includes:

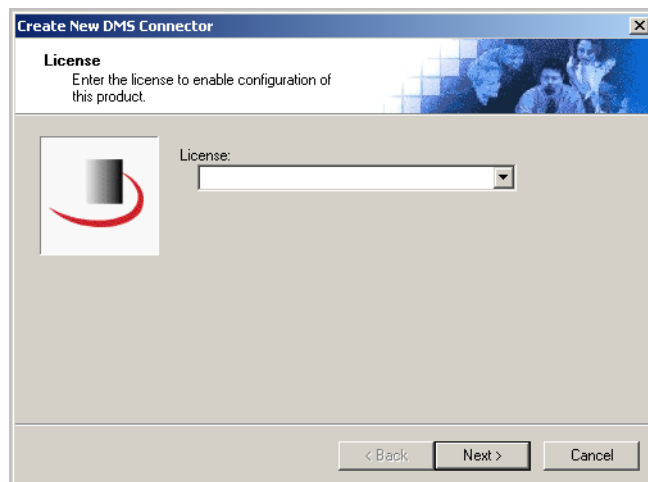
[Adding the Billing Provider connector \(3-1\)](#)

[Configuring the Billing Provider connector \(3-4\)](#)

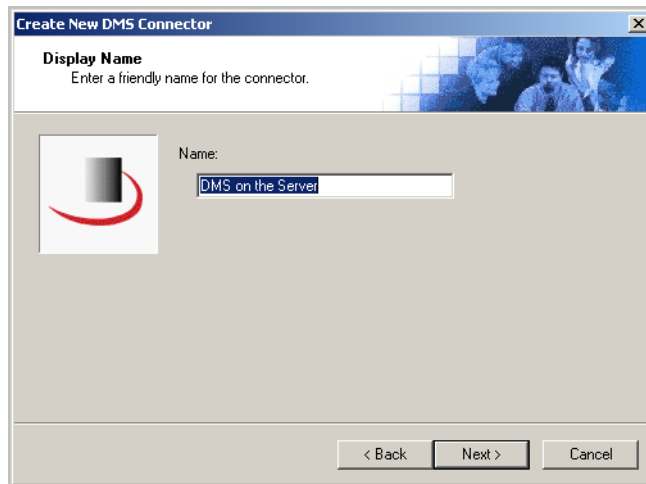
Adding the Billing Provider connector

To add the Billing Provider connector to an AccuRoute server:

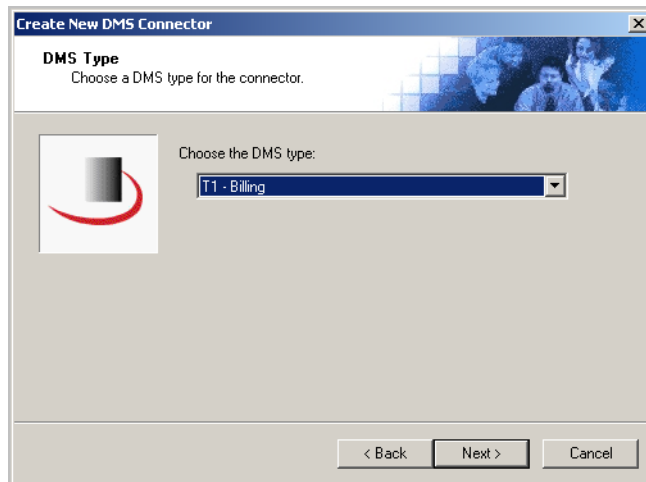
- I Right-click **CONNECTORS** in the console tree and select **NEW > DMS**. The License window appears.



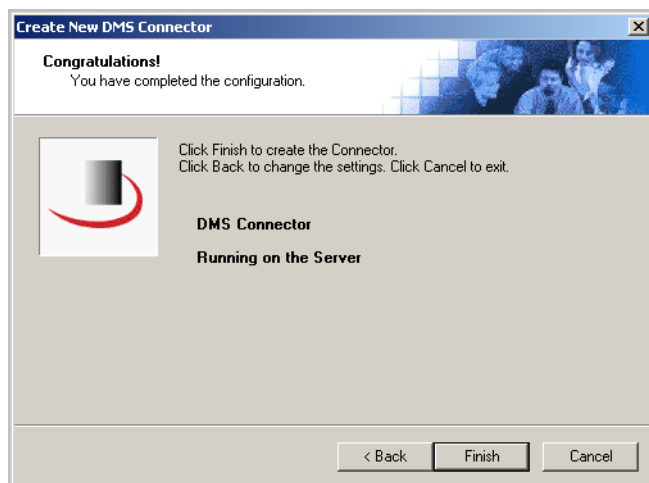
- 2 Type the license key for the Billing Provider connector in the **LICENSE** text box and click **NEXT**. The Display Name window appears.



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



- 4 Select **TI - BILLING** from the drop-down list and click **NEXT**. The Congratulations window appears.



- 5 Click **FINISH**.

Continue to [Configuring the Billing Provider connector](#).

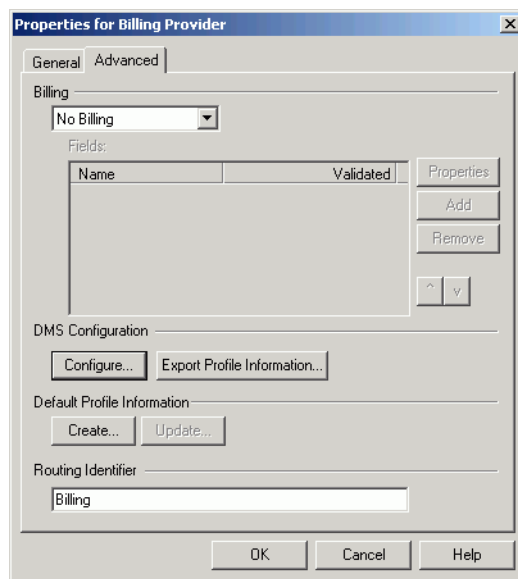
Configuring the Billing Provider connector

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

Note The **Configure**, **Export Profile Information**, and **Create Default Profile Information** buttons are not applicable for the Billing Provider DMS connector.

To complete configuration of the Billing Provider connector:

- 1 Click **CONNECTORS** in the console tree, and double-click the **BILLING PROVIDER** DMS connector in the details pane.
- 2 Click the **ADVANCED** tab.
- 3 From the **BILLING** drop-down box, select either **BILLING SELECTABLE** or **BILLING MANDATORY**.



- 4 Click **Add**. The Field Properties window appears.

- 5 Complete the following properties:

DSN: Provide the DSN to the database.

TABLE: Select a table from the drop-down list. The available tables are the tables that reside in the database.

DISPLAY NAME: Enter a meaningful display name. This is the name that shows on AccuRoute Desktop.

FIELD ID: Select a Field ID from the drop-down list. The Field ID drop-down list contains fields in the table selected above. The Field ID selected here returns values from the table to AccuRoute Desktop billing fields.

FIELD DESCRIPTION: Select a Field Description from the drop-down list. The Field Description drop-down list contains fields from the table selected above. This field is only seen in the lookup dialog.

PARENT NAME: If this field has a parent field, enter the Display Name of the parent field here. This is a required field if a dependency exists.

If this field has no dependency, it is blank. If this field is dependent on another field (parent), you must enter the Display Name of the parent field.

PARENT COLUMN: This property is only available if you have entered a value in the parent property. When you specify that the field has a parent, you must select a parent column from the table.

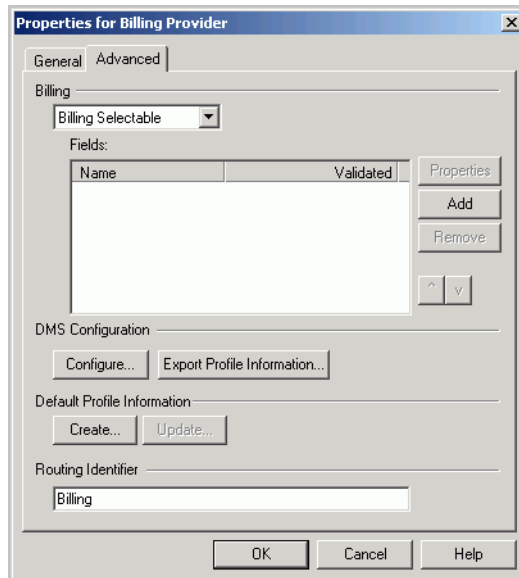
Some tables will contain a parent column. If such a column exists in the table, select it from the drop-down list. This will return only data values that are valid in conjunction with parent field.

USE DIFFERENT FIELD ID TO LOOKUP / VALIDATE DEPENDENT FIELDS: If the Child ID field in both the Parent and Child tables are the same field name, you do not need to use this option. If, however, the Child ID field in the Child table maps to a different field name in the Parent table, you need to use this option to provide that mapping.

FIELD MUST BE VALIDATED: Select this option if the field must be validated against the database. If you do not select this option, the field will not be validated, and can be overwritten with a value not contained in the database.

- 6 Click **OK** to return to the Advanced properties tab.
- 7 Add any other fields you require (up to three). After you have added a second field, the **UP** and **DOWN** buttons under the Remove button become available. Use these buttons to move the fields up and down the list until they are in the desired order.

It is important that you place the billing fields in the order you wish to be prompted for entry. Also, the lookup order depends on the parent/child relationship



- 8 Click **OK**

Section 4: Optional billing configuration

This section includes:

[Enabling billing on the connector](#) (4-1)

[Enabling billing in the Billing component](#) (4-2)

[Enabling billing for registered users](#) (4-2)

[Automatic billing entry](#) (4-2)

If you wish to use billing when profiling your Billing Provider message, you must enable billing on the Billing Provider 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 Billing Provider connector:

- 1 Click **CONNECTORS** in the console tree, and double-click the **BILLING PROVIDER** connector.
- 2 Click the **ADVANCED** tab.
- 3 From 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 TABLE**, **VALIDATE JOIN TABLE**, **VALIDATE FIELD**, **LOOKUP TABLE**, **LOOKUP FIELD**, **LOOKUP FILTER**, **PROFILE 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 In the **ROUTING IDENTIFIER** text box, change the Routing Identifier if desired. It is populated with a default Routing Identifier.
- 7 Click **OK** to save your changes.

Continue to [Enabling billing in the Billing component](#).

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**.

Continue to [Enabling billing for registered users](#).

Enabling billing for registered users

After you enable billing on the Billing Provider 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 **ACCURROUTE** tab.
- 3 Select **VALIDATE/LOOKUP VIA**, and select the **BILLING PROVIDER** connector from the drop-down list.
- 4 Click **OK** to save your changes.

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

Continue to [Automatic billing entry](#).

Automatic billing entry

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

- AccuRoute server v2.1
- AccuRoute Desktop v2.1 or higher

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 4: Optional billing configuration

Section 5: Testing and troubleshooting

This section includes:

[Testing](#) (5-1)

[Troubleshooting](#) (5-1)

Testing

To test the installation and configuration of Omtool DMS Libraries v2.2 for Billing Provider, send a message using any supported Document Management System that supports billing or test using an ADO or ODBC compatible database.

For detailed information on sending a message with a supported DMS application or a database that is ADO or ODBC compatible, consult the specific Omtool DMS Libraries v2.2 installation and integration guide or the documentation for your specific database.

Troubleshooting

To troubleshoot the Billing Provider, follow the troubleshooting steps listed in the specific Omtool DMS Libraries v2.2 installation and integration guide or the documentation for your specific database. If you are still unable to resolve the issue, contact Omtool. (Go to [Customer service and technical support](#) on the inside front cover.)

