
Omtool DMS Libraries v2.3 installation and integration guide for CA MDY FileSurf®

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Section I: Introduction

This guide contains instructions on deploying the CA MDY FileSurf® integration. It is written for systems administrators with detailed knowledge of the Omtool server and CA MDY FileSurf.

This section includes:

[Omtool DMS Libraries integration with CA MDY FileSurf](#) (I-1)

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

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

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

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

Omtool DMS Libraries integration with CA MDY FileSurf

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

Best of all, there is no learning curve for your users—the CA MDY FileSurf integration uses CA MDY FileSurf's native windows and are totally familiar to your users.

CA MDY FileSurf identifies repositories as Database Aliases. Each Database Alias is an ODBC DSN identifying the CA MDY FileSurf server, credentials, database, and other settings. In order to be supported by the server, multiple Database Aliases must be correctly configured by CA MDY FileSurf on the server previous to their use.

When you profile a document, the native CA MDY FileSurf profiling dialog box appears. The CA MDY FileSurf user fills out the profile dialog box in accordance with their sites specifications. The information entered in here is stored for later use during the submission process. The document stub is removed after the user completes the native profile dialog box. The feature, called stubless profiling, is required by CA MDY FileSurf.

When the document is submitted for delivery, the Omtool server acquires the stored profile information, checks to see if the document already exists, adds a date and time stamp to the document name, and then submits the document to CA MDY FileSurf. CA MDY FileSurf always creates a new document by adding a date and time stamp.

Stored profiles are multiple use, in other words they can be used time and time again. When reusing a stored profile, however, you cannot overwrite or merge to an existing document.

For more information on profiling documents to CA MDY FileSurf, go to [Section 7: Testing](#) (7-1)

Installation components

Omtool DMS Libraries v2.3 is included in the AccuRoute v2.3 installation. If you have AccuRoute v2.1, you should apply AccuRoute Desktop v2.2 Update to the Omtool server.

Deployment summary

To deploy the DMS Libraries v2.3 for CA MDY FileSurf update:

- 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 Test profiling a document into CA MDY FileSurf. (Go to [Section 7: Testing](#).)
- 6 Troubleshoot the installation. (Go to [Section 8: Troubleshooting](#).)

Release notes

Enhancements

Omtool DMS Libraries v2.3 for CA MDY FileSurf has been qualified with AccuRoute Desktop v2.2 or higher.

Resolutions

There are no known resolutions.

Limitations

There are no known limitations.

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>
- Sending a message to CA MDY FileSurf using AccuRoute Desktop - <http://www.omtool.com/documentation/dmslibraries/v23/MDYFileSurf/OmtoolDMSLibrariesV23CAMDYFileSurfQuickStartGuide.pdf>
- Administrator help - <http://www.omtool.com/documentation/omtoolserver/v36/admin/index.htm>

Section 2: Requirements

This section includes:

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

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

[Supported MDY FileSurf versions](#) (2-2)

Server requirements

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

- AccuRoute v2.1 / v2.2 / v2.3

If you are using AccuRoute v2.1, you must apply the AccuRoute Desktop v2.2 update to the Omtool server. This update includes Omtool DMS Libraries v2.2.

Note Currently, the Omtool DMS Libraries v2.3 are only available with the AccuRoute v2.3 server and client installations. The Omtool DMS Libraries v2.3 will be available as a separate download in the future.

- Tier 2 DMS connector license

Client requirements

The system where you install the Omtool DMS Libraries v2.2 for MDY FileSurf update must meet the following minimum requirements:

- AccuRoute Desktop v2.2 or higher
- The MDY FileSurf client software must be installed, configured, and functional on all client workstations
- MDYFSdata.dll version 7.5.4.2 is required

Supported MDY FileSurf versions

- MDY FileSurf v7.5

Section 3: Installation

This section includes:

- [Downloading the MDY FileSurf update](#) (3-1)
- [Running the update on the Omtool server](#) (3-1)
- [Adding the MDY FileSurf connector](#) (3-3)
- [All Omtool applications on the same system share the Omtool DMS Libraries configuration](#) (3-5)

Downloading the MDY FileSurf update

Note Currently, the Omtool DMS Libraries v2.3 are only available with the AccuRoute v2.3 server and client installations. The Omtool DMS Libraries v2.3 will be available as a separate download in the future.

Download the DMS Libraries v2.2 for MDY FileSurf update from the Omtool web server. (Go to <http://www.omtool.com/support> and log in using your customer number. Locate the module in the **DOWNLOADS & DOCS** section, download it, and save it to a local drive.)

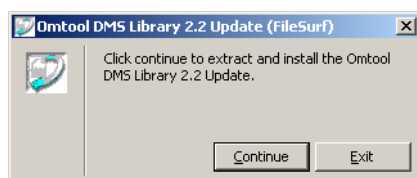
Continue to [Running the update on the Omtool server](#).

Running the update on the Omtool server

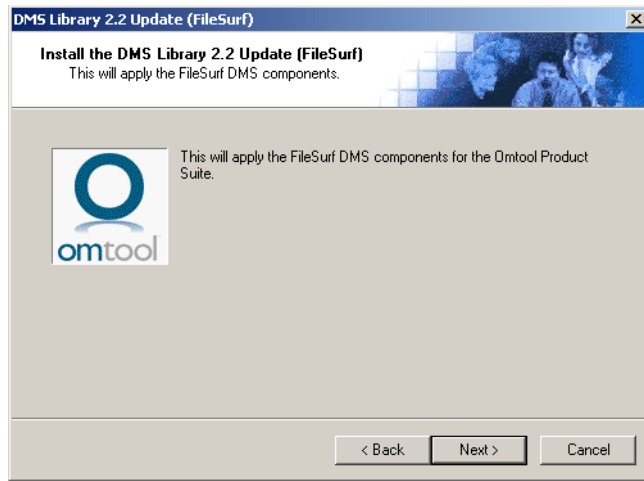
When run on the Omtool server, the update installs the MDY FileSurf DMS connector setup on the Omtool server.

To run the update:

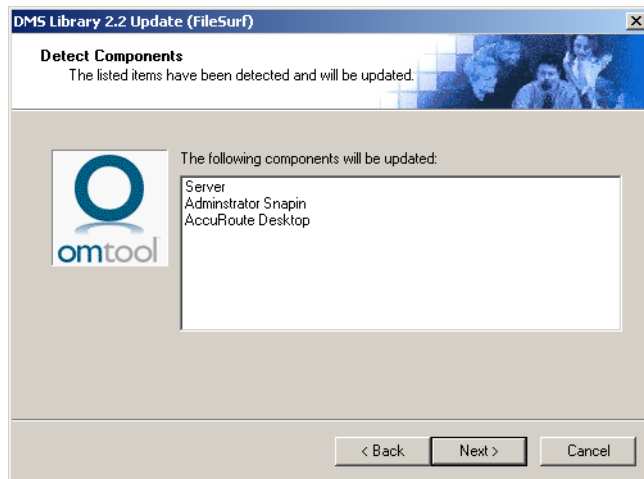
- 1 Quit all instances of the Omtool Server Administrator.
- 2 Disconnect all Terminal Server sessions.
- 3 Go to the folder where you stored the download and run **DMSUpdate22_FileSurf.exe**. The Omtool DMS Library 2.2 Update (FileSurf) window appears.



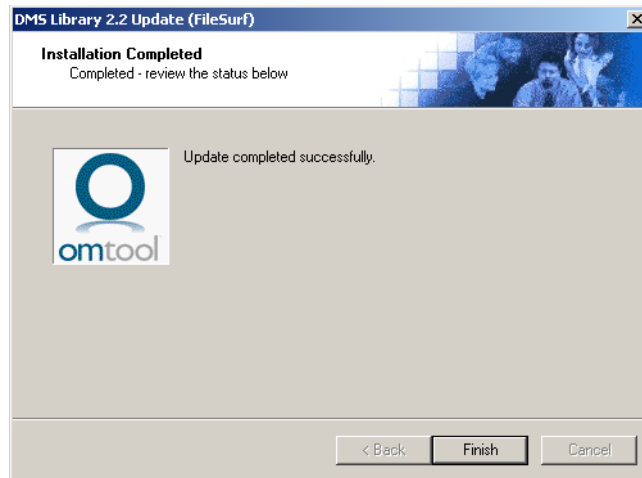
- 4 Click **CONTINUE**. The setup extracts files to the Omtool server and displays the Welcome window.



- 5 Click **NEXT**. The window shows the list of the components that need to be updated.



- Click **NEXT**. The setup copies files to the Omtool server and displays a message indicating that the update is complete.



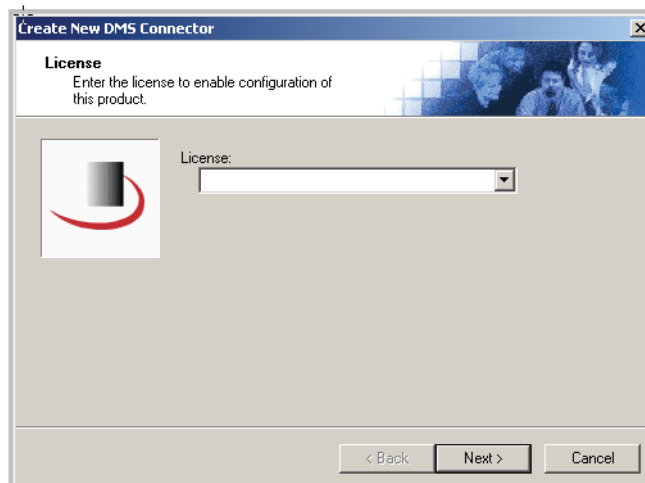
- Click **FINISH**.

Continue to [Adding the MDY FileSurf connector](#).

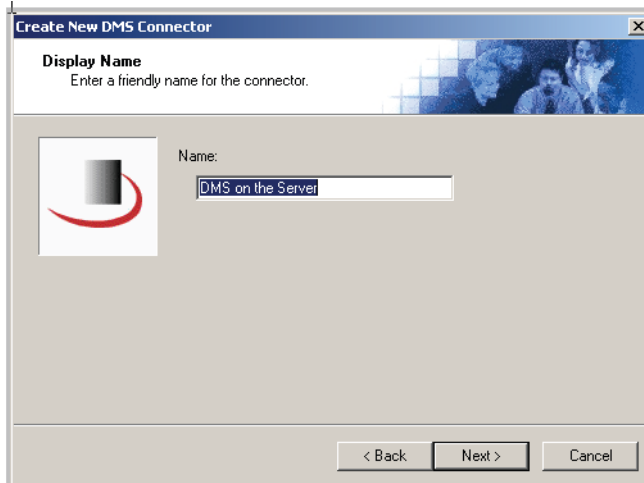
Adding the MDY FileSurf connector

To add the **MDY FileSurf** connector to an **AccuRoute** server:

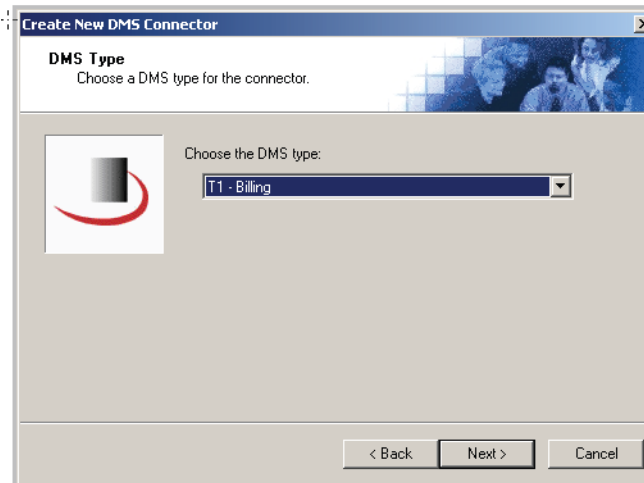
- Right-click **CONNECTORS** in the console tree and select **NEW > DMS**. The License window appears.



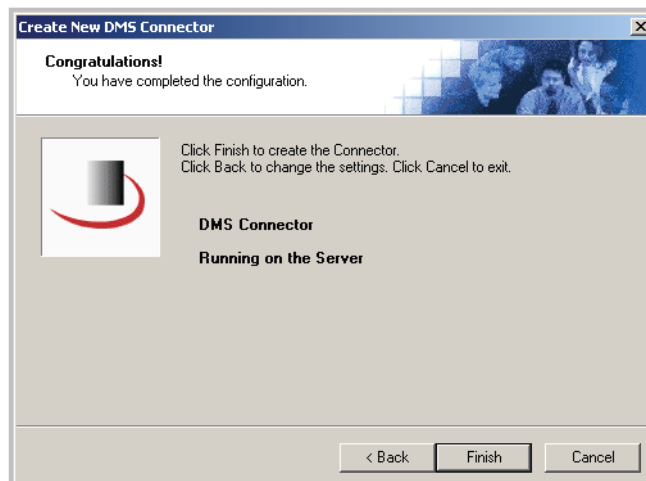
- 2 Type the license key for the MDY FileSurf connector in the **LICENSE** text box and click **NEXT**. The Display Name window appears.



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



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



- 5 Click **FINISH**. A message appears stating that the “configuration has been updated successfully.”

No further configuration is required on the Omtool server except for MDY FileSurf specific Database Alias configuration.

Note If you open the MDY FileSurf connector's properties, click the Advanced tab, and click Configure, the following message appears: “FileSurf has been configured properly.”

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.

Section 3: Installation

Section 4: Required server configuration

This section includes:

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

Enabling MDY FileSurf as a recipient type in AccuRoute Desktop

If you have added support for MDY FileSurf 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 MDY FileSurf 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 **ACCURROUTE** tab.
- 3 Select **ENABLE USE OF THE ACCURROUTE CLIENT**.
- 4 Locate **ALLOW USER TO ROUTE TO LIST** and select **MDY FileSurf**.
- 5 Click **OK** to save your changes.

Now when you start AccuRoute Desktop, MDY FileSurf is available.

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

Section 4: Required server configuration

Section 5: Optional server configuration

This section includes:

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

[Configuring document link](#) (5-2)

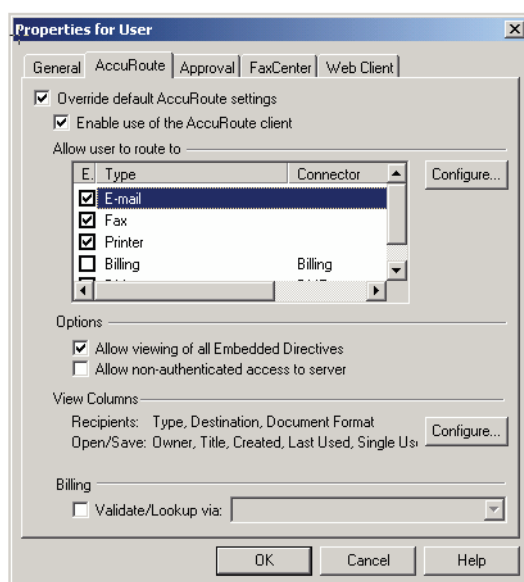
Changing the label of a document

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.

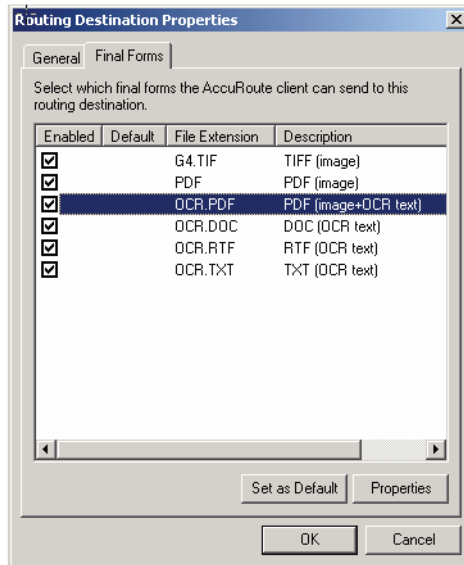
Tip If any individual users are registered on the AccuRoute server, complete this procedure once to modify user defaults and once for each individual user.

To change the label of a document type

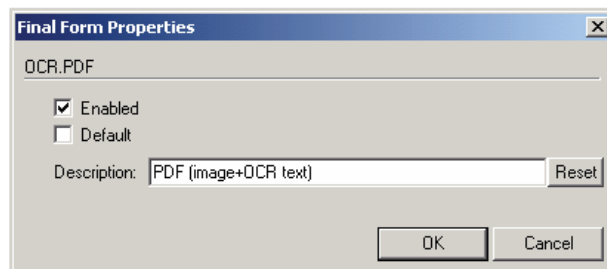
- 1 Click **REGISTERED USERS** in the console tree and double-click an individual user in the details pane, or right-click **REGISTERED USERS** in the console tree and select **USER DEFAULTS**.
- 2 Click the **ACCURROUTE** tab.
- 3 Highlight an item in the **ALLOW USER TO ROUTE TO** list.



- 4 Click **CONFIGURE** and click the **FINAL FORMS** tab.
- 5 Highlight the document type that needs to be modified.



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



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

Configuring document link

This section includes:

- [Installing the Omtool Web Client \(5-3\)](#)
- [Defining an outbound rule \(5-3\)](#)
- [Customizing the notification template \(5-4\)](#)

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

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

- AccuRoute server v2.1 or higher
- AccuRoute Desktop v2.2 or higher
- Internet Information Service (IIS)
- Omtool Web Client

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

Installing the Omtool Web Client

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

For detailed instructions for deploying the Omtool Web Client, consult the Omtool Web Client Implementation Guide at:

<http://www.omtool.com/documentation/omtoolserver/v332/webclient/omtoolwebclientinstallationguide.pdf>

Defining an outbound rule

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

- If Destination is an e-mail address is * then Route to SMTP on the server
- All e-mail to SMTP on the Server - Created by Connector Wizard

Note If one of the above rules doesn't exist, you need to create one of them. See the Administrator help for information on creating rules. <http://www.omtool.com/documentation/omtoolserver/v331/admin/>

Customizing the notification template

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

Note The document link only works for the originator of the message. When multiple recipients are selected for the notification, the other recipients will see the following message when attempting to view the document:

```
Invalid JobID specified
The fax may have been deleted, or you may not be
authorized to view that fax.
[UserEmail = 'administrator@stress.omtool.com'
FaxOwner= 'jdm@documentation.omtool.com']
```

To customize the AccuRoute template:

- 1 Use WordPad to open the following file:
 ...\\Omtool\\OmtoolServer\\Languages\\ENU\\Templates\\OMNotification-Success.OMTPL
- 2 Add the following line to this file. You can add the line anywhere.

```
http://Your AccuRoute server name/Your Virtual Directory name/
LaunchDMS.asp?jobID=%JOB_ID%
```
- 3 Replace Your AccuRoute server name with the actual name of your AccuRoute server.
- 4 Save and close the template notification file.

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

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

JobID: %JOB_ID%

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

FaxID: %FAX_PAGE1%
```

Section 6: Client Configuration

This section includes:

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

[Client deployment methods](#) (6-1)

Configuring AccuRoute Desktop

To add MDY FileSurf functionality to AccuRoute Desktop:

- 1 Start AccuRoute Desktop and log in.
- 2 Click **TOOLS** on the menu bar and select **CONFIGURE DMS**.
- 3 Select **FILESURF** from the menu that appears

No data entry is required. This step updates the Omtool DMS database and displays the following message: "FileSurf has been configured properly."

Continue to [Client deployment methods](#).

Client deployment methods

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

- Configure AccuRoute Desktop to support MDY FileSurf 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 MDY FileSurf for client rollout](#).
- Install AccuRoute Desktop on each individual workstation and perform the configuration steps for MDY FileSurf manually. Continue to [Configuring MDY FileSurf manually](#).

Configuring MDY FileSurf 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 MDY FileSurf manually after you install AccuRoute Desktop.

To pre-configure the Omtool DMS Libraries for deployment:

- 1 Install AccuRoute Desktop v2.2 or higher on a workstation.
- 2 Configure the Omtool DMS Libraries to support MDY FileSurf. Select the settings that should apply to all workstations in your environment.
- 3 Go to the c:\Program Files\Common Files\Omtool directory on the workstation where AccuRoute Desktop 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

You have pre-configured the Omtool DMS Libraries setup with the configuration data for MDY FileSurf. When you are ready to deploy MDY FileSurf, launch setup.exe in the AccuRoute Desktop directory.

Configuring MDY FileSurf manually

To configure MDY FileSurf manually:

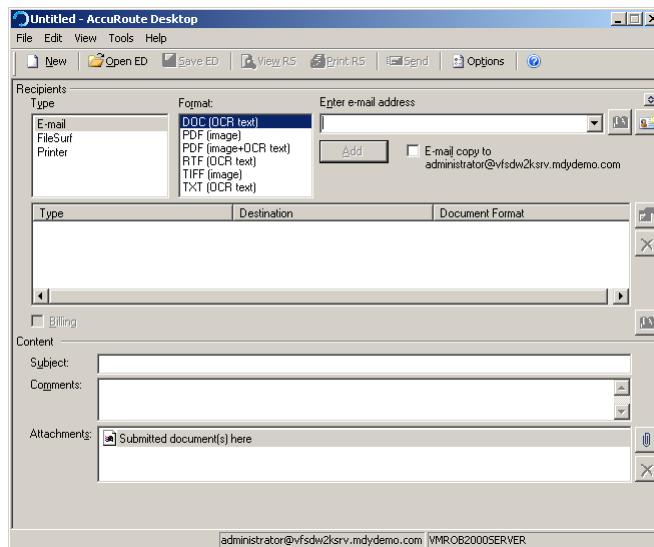
AccuRoute Desktop - (Go to [Configuring AccuRoute Desktop](#) on 6-1.) Follow these steps on all AccuRoute Desktop workstations.

Section 7: Testing

To test the installation and configuration of Omtool DMS Libraries v2.3 for MDY FileSurf, send a message using AccuRoute Desktop. For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to [Related documentation](#) on I-3.

To send a message to MDY FileSurf using AccuRoute Desktop:

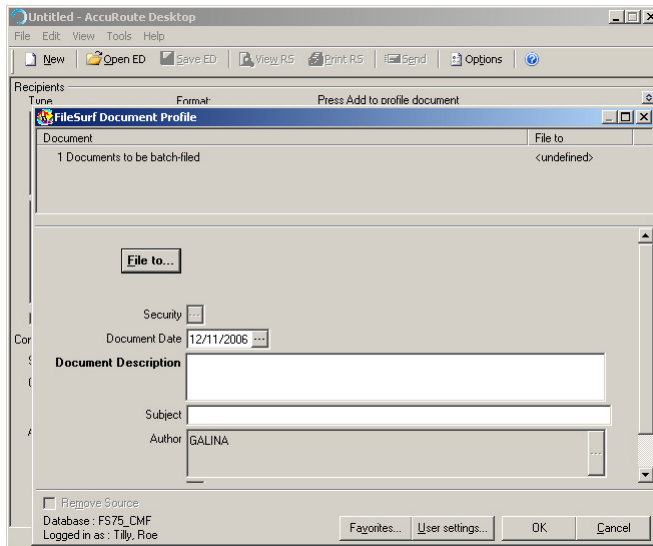
- 1 Start AccuRoute Desktop. Click **START**, go to the Omtool programs group, and select **ACCURROUTE DESKTOP**. Log in if prompted. The application appears on your desktop.



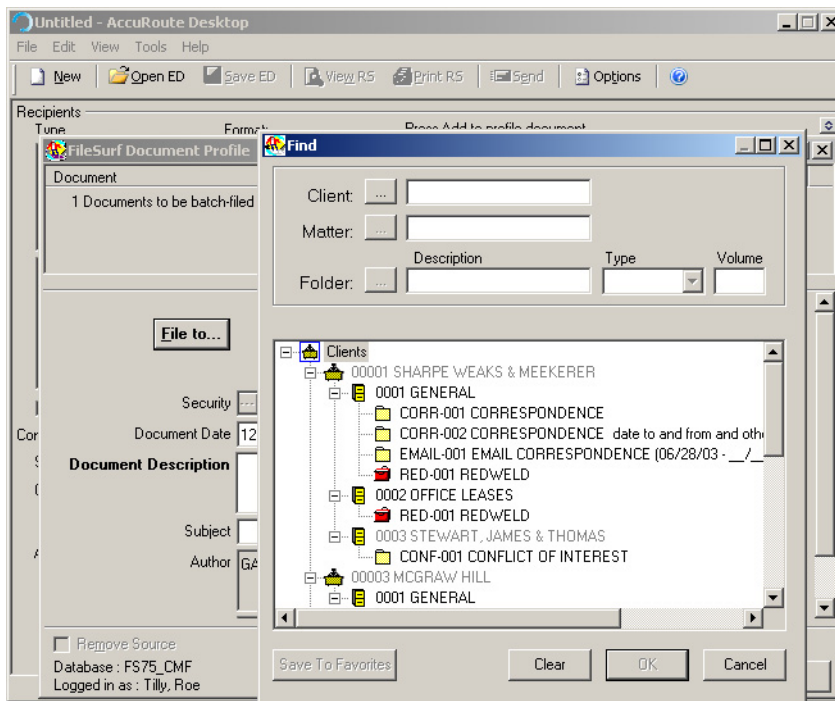
- 2 Select the destination type **FILESURF** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.

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

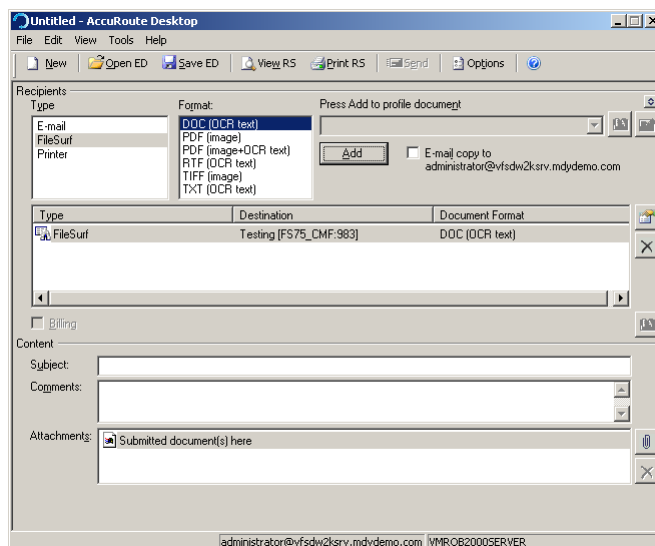
3 Click **ADD**.



4 Click **FILE TO**.



- 5 Enter desired information and click OK. A FileSurf recipient type is added to the message.



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

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

WEB DOCUMENT - Select this option to attach a web page from the Internet. 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.)

Section 8: Troubleshooting

This section includes:

[Detecting workflow issues](#)

[Troubleshooting the delivery mechanism](#) (8-1)

[Troubleshooting the message on the Omtool server](#) (8-2)

[Troubleshooting the multifunction device](#) (8-4)

[Troubleshooting the client](#) (8-4)

Complete these procedures in the order they appear. If you cannot resolve the issue, contact Omtool. (Go to [Customer service and technical support](#) on the inside front cover.)

Detecting workflow issues

After a document has been profiled to MDY FileSurf, 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 MDY FileSurf, 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 MDY FileSurf. Do some basic troubleshooting on MDY FileSurf. If MDY FileSurf is functioning correctly, troubleshoot the message on the Omtool server.

For information on troubleshooting MDY FileSurf, consult MDY FileSurf's documentation.

Continue to [Troubleshooting the message on the Omtool server](#).

Troubleshooting the message on the Omtool server

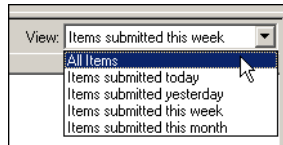
There are two important questions that can be resolved when troubleshooting a message on the Omtool server:

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

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

To locate the message on the Omtool server:

- 1 Start the Administrator.
- 2 Go to **OMTOOL SERVER ADMINISTRATOR > [SERVERNAME] > MESSAGES**.
- 3 Look for the message in the In Process queue:
 - a Click **IN PROCESS**.
 - b View **ALL ITEMS**.

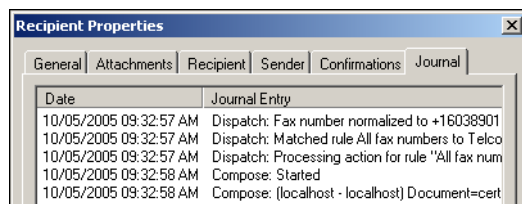


- c Sort all items by the date submitted.
 - d Look for the message.
- **Message found** - Double-click the message and then click the **JOURNAL** tab to view the message journal to determine the current state and status of the message. Then monitor the components and confirm that the message is moving through the processing queues on the Omtool server. If the

Omtool server stops processing the message (for example, the message seems to be stuck in a processing queue), restart all the Omtool services.

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

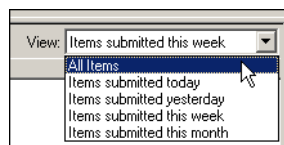
Also, check the Event Viewer for any information that might help troubleshoot the issue.



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

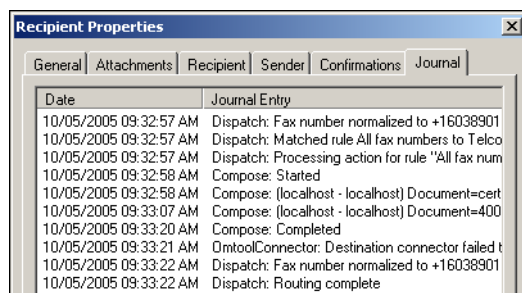
4 Look for the message in the History queue:

- a Click **HISTORY**. The message could be in either the Successful barometer or the General Failure barometer.
- b View **ALL ITEMS**.



- c Sort all items by the date submitted.
- d Look for the message.

- **Message found** - Double-click the message and then click the **JOURNAL** tab to view the message journal to determine the cause of the failure.



If the message failed, correct the issue and send the message again. Contact Omtool if you are unable to resolve the issue. (Go to [Customer service and technical support](#) 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 MDY FileSurf successfully. Do some advanced troubleshooting on MDY FileSurf to determine why the message is

not being delivered to its destination. Contact Omtool if you are unable to resolve the issue. (Go to [Customer service and technical support](#) 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 MDY FileSurf. If you are able to send messages to recipients other than MDY FileSurf and MDY FileSurf is operating correctly, contact Omtool. (Go to [Customer service and technical support](#) on the inside front cover.)