# Omtool DMS Libraries Installation and Integration Guide for SharePoint®

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omtool™

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# Omtool support and sales

## Online resources

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

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

## Customer service and technical support

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

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

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

## Sales, consulting services, licenses, and training

Contact Omtool Sales using any of the following methods:

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# Contents

## Section 7: Testing

## Section 8: Troubleshooting

# Section 1: Introduction

This guide contains instructions on deploying Omtool DMS Libraries v4.0 for SharePoint. It is written for systems administrators with detailed knowledge of the Omtool server and SharePoint.

This section includes:

## Omtool DMS Libraries integration with SharePoint

Omtool DMS Libraries v4.0 includes the ability to integrate with SharePoint.

Using Omtool DMS Libraries v4.0, you can be sure all of your important documents are stored in SharePoint. The combined power of AccuRoute Desktop v4.0 and Omtool DMS Libraries v4.0 for SharePoint allows your users to send both soft copy and hard copy documents to SharePoint quickly and easily.

Best of all, there is no learning curve for your users—Omtool DMS Libraries v4.0 for SharePoint uses SharePoint's native windows and are totally familiar to your users.

For more information on profiling documents to SharePoint, go to Section 7: Testing.

## Installation components

Omtool DMS Libraries v4.0 is included in the AccuRoute v4.0 installation.

> **Note**   The instructions in this guide are applicable only if you are running Omtool DMS Libraries v4.0.

# Deployment summary

**To deploy Omtool DMS Libraries v4.0 for SharePoint:**

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

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

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

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

5   Test profiling a document into SharePoint. (Go to <u>Section 7: Testing</u>.)

6   Troubleshoot the installation. (Go to <u>Section 8: Troubleshooting</u>.)

# Release notes

## Enhancements

Omtool DMS Libraries v4.0 for SharePoint includes the following enhancements:

- Omtool DMS Libraries v4.0 for SharePoint has been qualified with AccuRoute Desktop v4.0.

## Resolutions

Omtool DMS Libraries v4.0 for SharePoint includes the following resolved issues.

- 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 <u>Omtool support and sales</u> 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

- When trying to route jobs to the SharePoint connector the following error appeared: "Failure 80010105 an unanticipated error has occurred" and the following error sometimes appeared in the Journal: "Remote procedure call failed 0x800706be." See Knowledge Base Article K04083. (Go to <u>Omtool support and sales</u> on the inside front cover.) Ref. A8868

## Limitations

Omtool DMS Libraries v4.0 for SharePoint includes the following limitation:

**Acrobat PDF icon does not display when importing to SharePoint**: When you import a PDF document into SharePoint, the Acrobat PDF icon does not display.

Microsoft did not include a PDF icon with SharePoint.

To add the icon, place the PDF icon named "icpdf.gif" into C:\Program Files\Common Files\Microsoft Shared\web server extensions\60\TEMPLATE\IMAGES, or wherever this directory is on your server. You can do the same with any other file type that is does not have an icon.

In addition to placing the icpdf.gif in the ...\TEMPLATE\IMAGES directory, you also need to map the extension to the icon in ...\TEMPLATE\XML\docicon.xml by adding the map for pdf. See the Microsoft Knowledge Base Article on the ByExtension Element for steps on performing this mapping located at http://msdn.microsoft.com/library/default.asp?url=/library/en-us/spsdk11/CAML_Schema/ spxmlelByExtension.asp.

# Related AccuRoute 4.0 documentation

For more information about AccuRoute Desktop and other AccuRoute products, refer to the AccuRoute v4.0 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

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

❏  AccuRoute v4.0

> **Note**  Currently, the Omtool DMS Libraries v4.0 are only available with the AccuRoute v4.0 server and client installations. The Omtool DMS Libraries v4.0 will be available as a separate download in the future.

❏  DMS connector license

> **Note**  The DMS connector license must be added to the server prior to adding the connector. The AccuRoute server makes one connector available by default. Check the licensing properties on your server for connector availability.
>
> For more information about license activation, continue to Entering a license for SharePoint (2-1).

❏  A SharePoint portal must be available to the DMS connector for SharePoint.

## Entering a license for SharePoint

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

You can activate the SharePoint license in one of two ways:

- Automatically when you enter an activation code and the AccuRoute server is on a system that has access to the internet.

- Manually if the AccuRoute server does not have access to the internet. In this case, you will:

  ▸  Submit and validate the activation code.

▸ Create an Export file into which the activation code is copied.

▸ Create an Import file and use this file for activation from a system that does have internet access.

## Automatic license activation

Be sure the AccuRoute server has access to the internet. Have available a copy of the activation code.

1   Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.

2   Expand the tree view and select the server name.

3   Right-click and select the **Licensing** option**. The **Licensing** page is displayed.

4   Click the **Activate License...** button. The **License Activation** page is displayed.

5   Select the **Automatically activate via the Internet** option.

6   Enter your license activation code in the **Activation Code** text field.

7   Click **OK**. The server is updated with your license.

8   Click **Close** to complete the procedure.

## Manual license activation

Have available a copy of the activation code.

> **Note**   Although the AccuRoute server may not have access to the internet, to complete this procedure you will need a system that does have access.

1   Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.

2   Expand the tree view and select the server name.

3   Right-click and select the **Licensing** option**. The **Licensing** page is displayed.

4   Click the **Activate License...** button. The **License Activation** page is displayed.

5   Select the **Export activation file for manual activation** option.

6   Create an Export license file:

   a   Browse to a location where you want to save the license file. By default, the file is an Export file named `ManualActivation.exp`. After specifying the file name and location, click **Save**.

   b   The path will appear in the **Export Filename** field on the **License Activation** page. Click **OK**.

7   From a system with internet access, launch the web browser and go to:

   `https://license.omtool.com/accuroute`

The **Manual Licensing Portal** page opens.

## Manual Licensing Portal

Enter your activation code and select the Exported Activation File made using the Server Administrator.

| | |
|---|---|
| Activation Code: | |
| | ● Activate License   ○ Deactitvate License |
| Exported Activation File: | Browse... |
| | NEXT ▸ |

8 Enter your license activation code in the **Activation Code** text field.

9 Be sure the **Activate License** option is selected (the default).

10 Click the **Browse** button to select the `ManualActivation.exp` file created in Step 6. With the file name selected (highlighted), click **Open**.

11 Verify that the license information is entered correctly on the **Manual Licensing Portal** page.

**12** Click **NEXT** and the **Activation Successful** message is displayed.
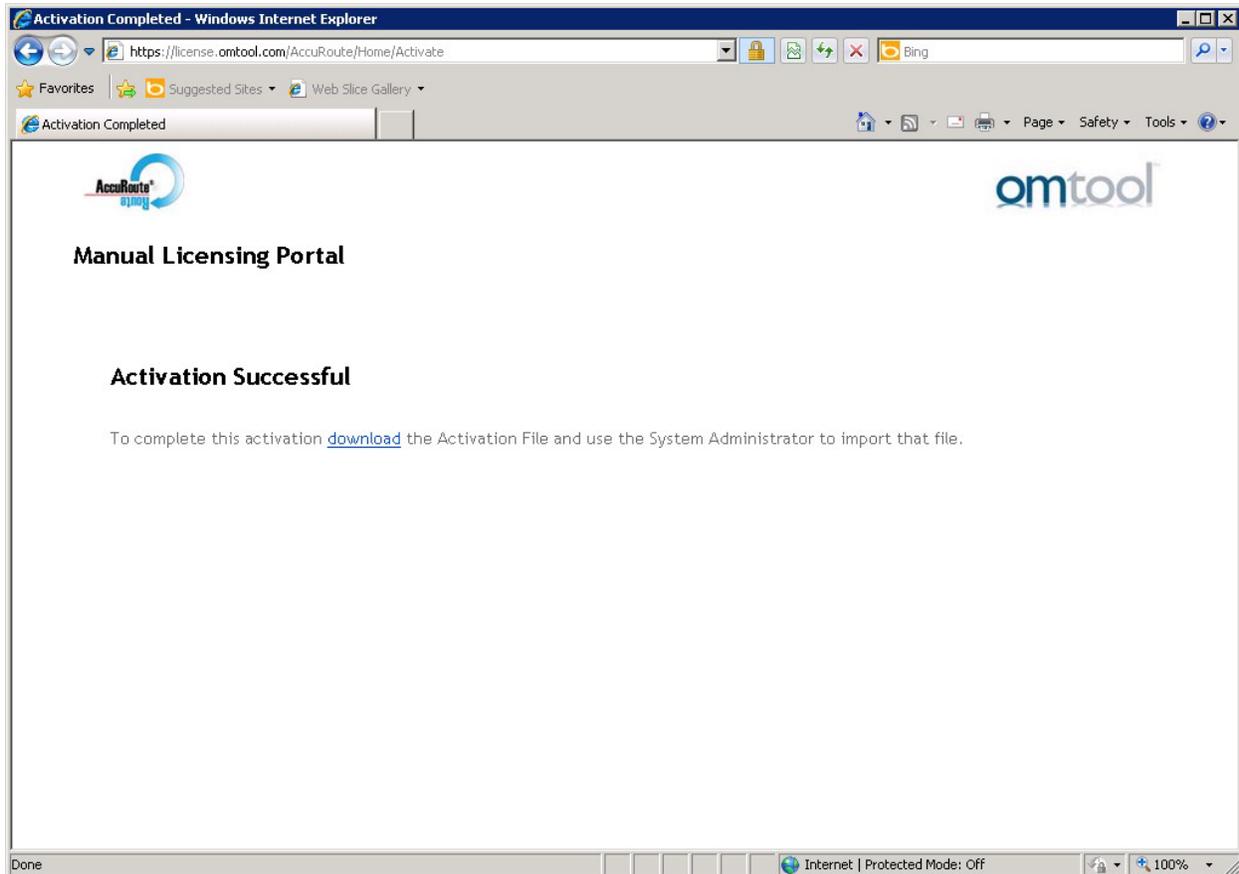


**13** To complete the activation, click **Download**. The **File Download** page is displayed.

**14** Click **Save** to create the Import file. By default, the file is named with the activation code. You can change this (for example, `ManaulActivation.imp`) and select a location for the file on the AccuRoute server.

**15** Click Save. The **Download Complete** page shows that status of the file download.

**16** Click **Close**.

> **Note**    You can minimize or close the browser.

**17** On the **Licensing** page, click the **Activate License...** button.

**18** Select the **Import activation file from manual activation** option.

**19** Browse to the saved `ManaulActivation.imp` file. Select the file and click **Open**.

**20** Click **OK** on the **License Activation** page. The license is updated.

**21** Click **Close** to complete the procedure.

# Client requirements

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

❐        AccuRoute Desktop v4.0

❐        FaxCenter v3.4

# Supported SharePoint versions

❐        Permissions to access a Microsoft SharePoint 2003 portal. SharePoint is a shared document repository.

# Section 3: Installation

This section includes:

## Adding the SharePoint connector

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

**To add the SharePoint connector to an AccuRoute server:**

1 Right-click **Connectors** in the console tree and select **New AccuRoute Server connector for > MyFolder**. The **Server Address** page appears.
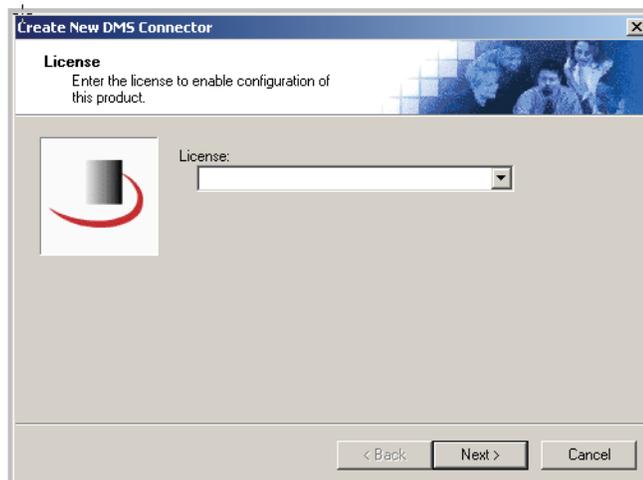
2    Select the server address to which you want this connector installed. Choose **Run on the Message Server** or **Remote Server**. If you selected **Remote Server**, enter the name of the server. Click **Next**. The **Display Name** page appears.
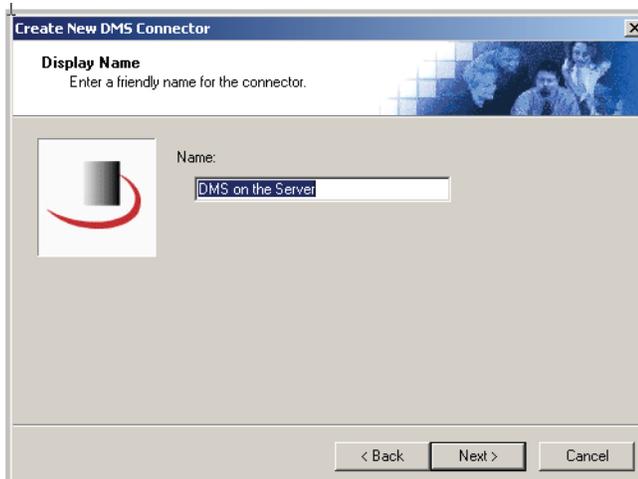


3    **MyFolder on the Server** appears as the default name. Type a friendly name for this connector in the **Name** text box and click **Next**. The **Congratulations** page appears.

4    Click **Finish**.

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

Continue to Completing the SharePoint connector configuration wizard.

# Completing the SharePoint connector configuration wizard

**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.

## 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 SharePoint connector

The **SharePoint Default Location** page appears immediately after you complete the new connector wizard.

*Figure 3-A:* **SharePoint Default Location window**

Enter the SharePoint URL in this window.
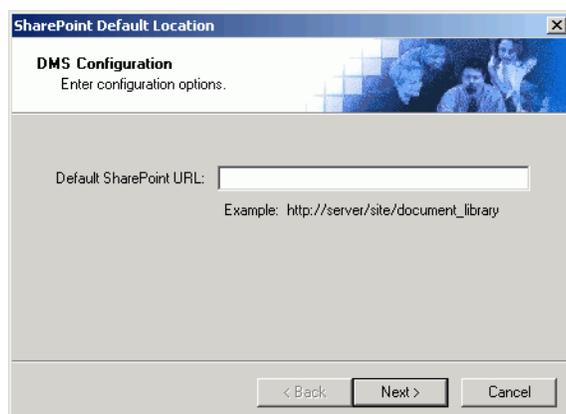


**To complete the configuration wizard for a new SharePoint connector:**

**1**   Enter the URL to your SharePoint repository in the **Default SharePoint URL** text box.

**2**   Click **Next**. The **SharePoint User Configuration** page appears.
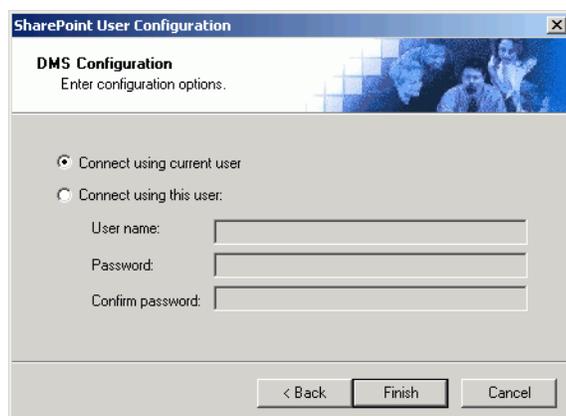


**3**   Select an authentication method:

**Connect using current user** - Select this option to connect to SharePoint using the login credentials of the current Windows user. (This setting is recommended for single-user workstations.)

**Connect using this user** - Select this option to connect to SharePoint using specific login credentials, and type the user name and password in the **User name**, **Password**, and **Confirm password** text boxes.

If you are configuring the DMS connector on the AccuRoute server, Omtool strongly recommends that you configure the AccuRoute server with the login credentials of Windows user account that has Windows sharing and security permissions to read and write to SharePoint. In rare circumstances, when the AccuRoute server cannot obtain the Windows login credentials of the AccuRoute Desktop user, the server uses these login credentials. This reduces the possibility of an authentication failure.

**4**   Click **Finish**.

After you complete the **DMS configuration wizard**, the SharePoint connector appears in the **Connectors** details pane.

# Configuring an existing SharePoint connector

**To complete the configuration wizard for an existing SharePoint connector:**

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

2  Click the **Advanced** tab.

3  Locate the **DMS Configuration** section, and click **Configure**. The **SharePoint Default Location** page appears.

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

# Section 4: Required Server Configuration

This section includes:

## Enabling SharePoint as a recipient type in AccuRoute Desktop

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

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

Now when you start AccuRoute Desktop, SharePoint is available.

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

# Section 5: Optional server configuration

This section includes:

## Changing the label of a document

Changing the label of a document type allows you to specify the name that appears to your users. For example, you might want TIFF (Image) to read Fax Format. You can change these labels in the Omtool Administrator under Registered Users.

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

**To change the label of a document type**

1   Click **Registered Users** in the console tree and double-click an individual user in the details pane, or right-click **Registered Users** in the console tree and select **User Defaults**.

2   Click the **AccuRoute** tab.

3   Highlight an item in the **Allow User to Route to** list.
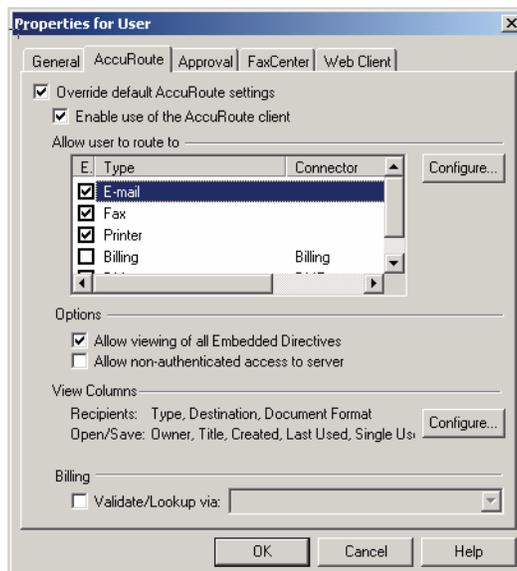


4   Click **Configure** and click the **Final Forms** tab.

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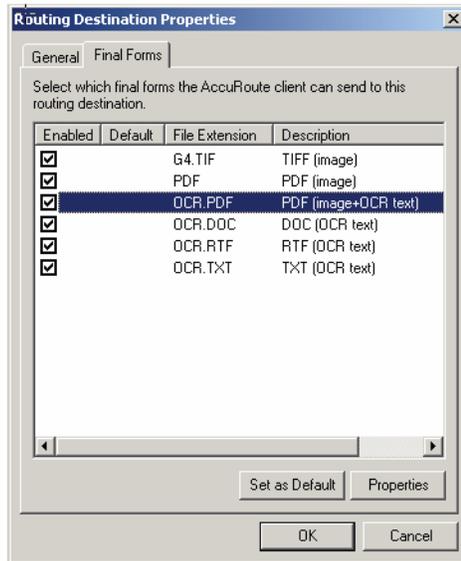
**6**   Click **Properties**.

**7**   Enter the new label for this document type in the **Description** field.
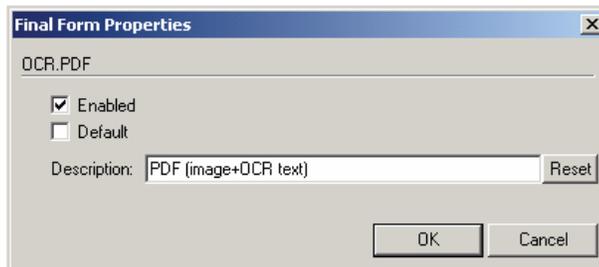


**8**   Click **OK** to close all the open dialogs.

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

# Section 6: Client configuration

This section includes:

## Configuring AccuRoute Desktop

**To add SharePoint functionality to the AccuRoute Desktop:**

**1** Start AccuRoute Desktop and log in.

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

**3** Select **SharePoint** from the menu that appears. The **SharePoint Default Location** screen appears.

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

Continue to Configuring FaxCenter.

## Configuring FaxCenter

**To add SharePoint functionality to FaxCenter:**

**1** Start FaxCenter and log in.

**2** Click **Tools** on the menu bar and select **Configure DMS**. The **Document Management Configuration** screen appears.

**3** Select **SharePoint** and click **Configure**. The **SharePoint Default Location** screen appears.

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

**5** Click **OK** on the **Document Management Configuration** screen.

# Configuring Swiftwriter

**To add SharePoint functionality to Swiftwriter:**

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

2   Click **FileShare** in the list so that the option text is highlighted and click **Properties**. The **SharePoint Default Location** screen appears.

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

4   Select **SharePoint**, click **Apply**.

5   Click **OK**.

# Client deployment methods

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

- Configure AccuRoute Desktop or FaxCenter to support SharePoint 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 SharePoint for client rollout.

- Install AccuRoute Desktop or FaxCenter on each individual workstation and perform the configuration steps for SharePoint manually. Continue to Configuring SharePoint manually.

## Configuring SharePoint 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 SharePoint manually after you install AccuRoute Desktop.

**To pre-configure the Omtool DMS Libraries for deployment:**

1   Install AccuRoute Desktop v4.0 or FaxCenter on a workstation.

2   Configure the Omtool DMS Libraries to support SharePoint. 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 or FaxCenter is installed, and copy the `OmDMSDB.xml` file to the clipboard.

4   Go to the Omtool server where AccuRoute Desktop or FaxCenter setup files are located, and paste the file to the following locations. When prompted to replace the existing file, click **Yes**.

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

   `...\OmtoolServer\Clients\FaxCenter\Common\Omtool`

You have pre-configured the Omtool DMS Libraries setup with the configuration data for SharePoint. When you are ready to deploy SharePoint, launch `setup.exe` in the AccuRouteDesktop v4.0 or FaxCenter directory.

# Configuring SharePoint manually

**To configure SharePoint 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: Testing

## Testing the installation and configuration

To test the installation and configuration of Omtool DMS Libraries v4.0 for SharePoint, send a message using AccuRoute Desktop. For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to Related AccuRoute 4.0 documentation on 1-3.

**To send a message to SharePoint 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.
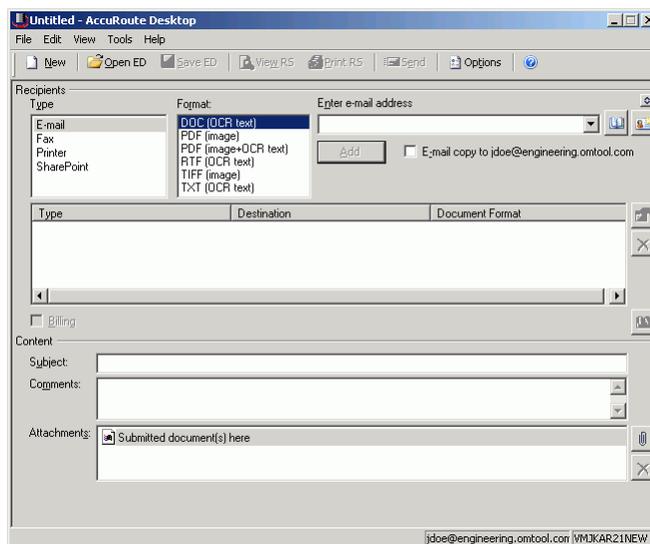


2   Select the destination type **SharePoint** in the **Recipients Type** list and select a file format for your message in the **Format** list.

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

**3**    Click **Add**. The **Save** screen appears.
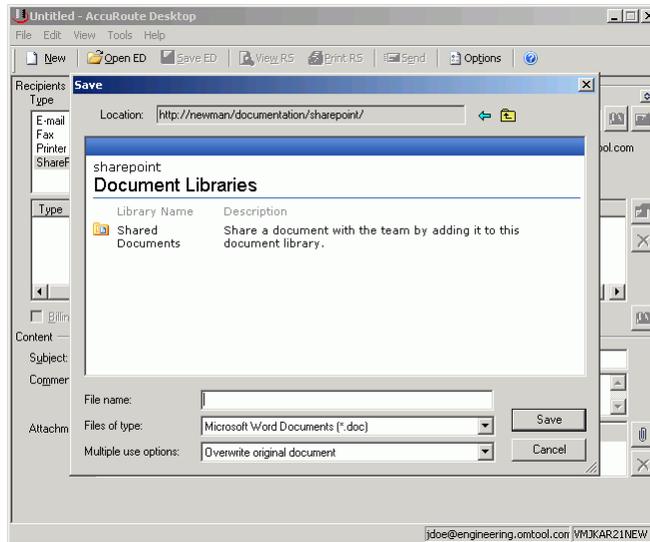


**4**    In the **File name** text box, enter the file name you wish to assign to your document.

The **Files of type** option defaults to match the document format you selected in Step 2. Do not make any changes to this option.

**5**    From the **Multiple use options** drop-down list, select one of the following:
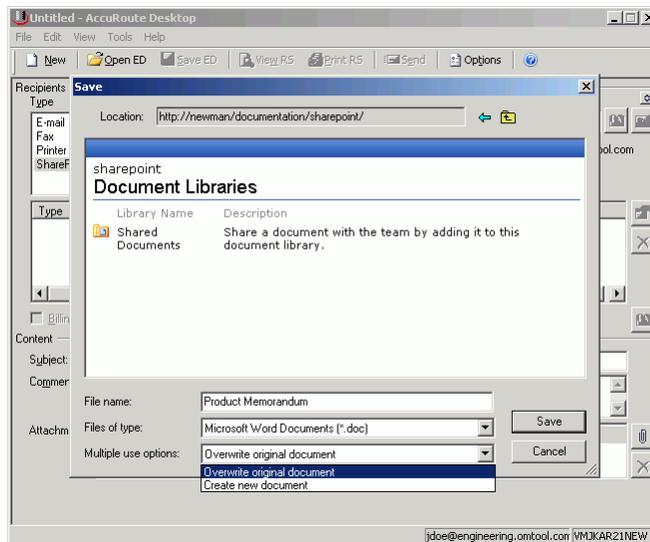


**Create new document -** Selecting this option creates a new document in SharePoint. If you select this option and the file name already exists, the date and time are appended to the file name. The original document is retained.

**Overwrite original document** - If a document already exists with the file name you selected in Step 4, selecting this option overwrites the original file. Click **Yes** when the following message appears to replace the file or click **No** to return to the SharePoint window.

**6**   Click **Save**. A SharePoint destination appears in the message.
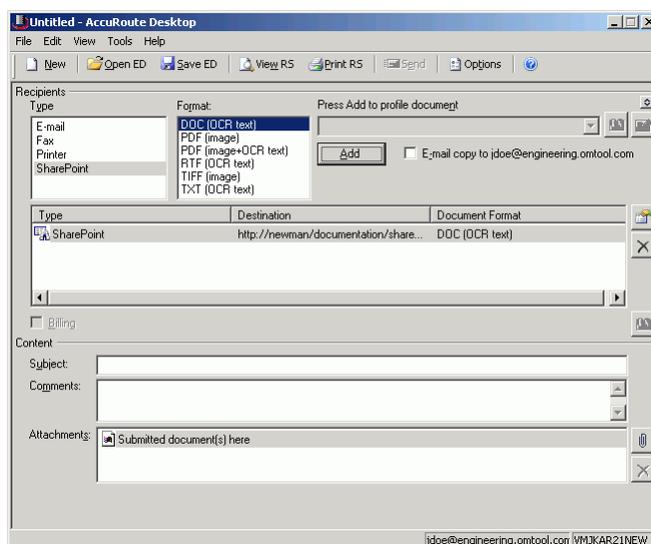


**7**   Add content to your message.

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

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

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

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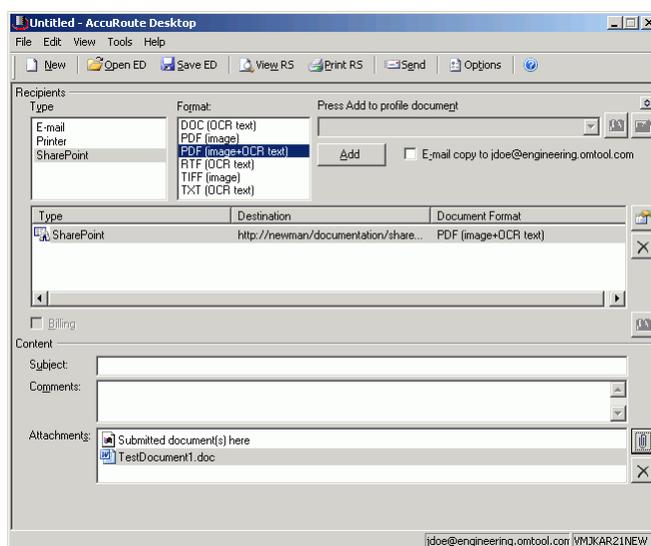


**8**   Do any of the following:

**Send the message immediately** - Click **Send** on the toolbar. A message box indicates that your message has been sent to the server. (Your message must have at least one attachment.)

**Save the message as an Embedded Directive** - Click **Save ED** on the toolbar, type a title for the Embedded Directive, and click **Save**.

**Print a Routing Sheet that can be scanned with hard copy documents** - Save the message as an Embedded Directive. Then click **Print ED** on the toolbar. AccuRoute Desktop creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your network administrator. (Your message can include both electronic and hard copy documents.)

# Section 8: Troubleshooting

This section includes:

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

## Detecting workflow issues

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

For information on troubleshooting SharePoint, consult SharePoint'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**.
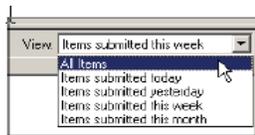


**c** Sort all items by the date submitted.

**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.

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

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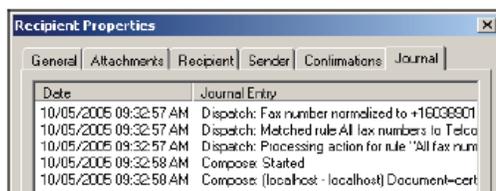


- **Message not found** - Go to step 4 and look for the message in the History queue.

**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**.
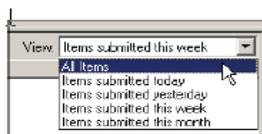


   **c**    Sort all items by the date submitted.

   **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.
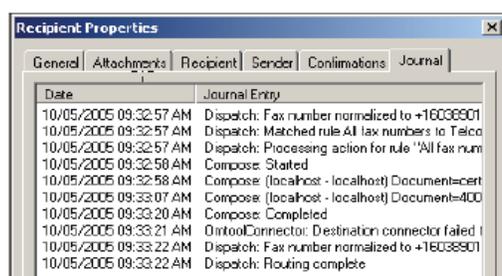


   If the message failed, correct the issue and send the message again. Contact Omtool if you are unable to resolve the issue. (Go to Omtool support and sales on the inside front cover.)

   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 SharePoint successfully. Do some advanced troubleshooting on SharePoint 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 SharePoint. If you are able to send messages to recipients other than SharePoint and SharePoint is operating correctly, contact Omtool. (Go to Omtool support and sales on the inside front cover.)