Omtool DMS Libraries v2.2 installation and integration guide for DM

For AccuRoute v2.1
March 8, 2007 (4.0325-AA)

omtool™

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Contents

Contents

Section 7: Optional billing configuration

Section 8: Testing

Section 9: Troubleshooting

Section 1: Introduction

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

This section includes:

Omtool DMS Libraries integration with DM

Omtool DMS Libraries v2.2 includes the ability to integrate with DM.

Using Omtool DMS Libraries v2.2, you can be sure all of your important documents are stored in DM. The combined power of AccuRoute Desktop and Omtool DMS Libraries v2.2 for DM allows your users to send both soft copy and hard copy documents to DM quickly and easily.

Best of all, there is no learning curve for your users—Omtool DMS Libraries v2.2 for DM uses DM's native windows and are totally familiar to your users.

For more information on profiling documents to DM, go to Section 8: Testing (8-1)

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 DM:

1   Complete the installation requirements. (Go to Section 3: Installation.)

2   Complete the required server configuration. (Go to Section 4: Required server configuration.)

3   Complete any optional server configuration. (Go to Section 5: Optional server configuration.)

4   Complete the client configuration. (Go to Section 6: Client configuration.)

5   Complete any optional billing configuration. Optional billing configuration (7-1)

6   Test profiling a document into DM. (Go to Section 8: Testing.)

7   Troubleshoot the installation. (Go to Section 9: Troubleshooting.)

Release notes

Enhancements

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

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

Resolutions

Omtool DMS Libraries v2.2 for DM includes the following resolved issues:

- When the DM Client was using Windows authentication, the first use of a Routing Sheet with a destination of DM scanned successfully, but any subsequent scans failed with an error: An internal consistency check has failed. See Knowledge Base Articles K03794 and K03795.

- While saving an Embedded Directive in DM, users were prompted for the validation server library. See Knowledge Base Article K03797.

- 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 Online resources on the inside front cover.)

- 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.

- The OmtoolStub document name was not configurable. See Knowledge Base Article K03746. (Go to Online resources on the inside front cover.)

Limitations

Omtool DMS Libraries v2.2 for DM includes 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 DM using AccuRoute Desktop - http://www.omtool.com/documentation/dmslibraries/v22/DM/OmtoolDMSLibrariesV22DMQuickStartGuide.pdf

- Administrator help - http://www.omtool.com/documentation/omtoolserver/v331/admin/

Section 2: Requirements

This section includes:

Server requirements

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

- AccuRoute v2.1

- Tier 2 DMS connector license

- AccuRoute Desktop v2.2 Update, which includes Omtool DMS Libraries v2.2, must be applied to the server

- The DM client software, including the shell extensions **Windows Explorer DM Extension** and **Windows Desktop DM Extension**, must be installed on the Omtool server

- The DM client software installed on the AccuRoute server must not integrate with Microsoft Word

- Do not install Intercepter on a system where you plan to install the Omtool DMS Libraries. Intercepter, an optional component of the DM, DOCS Open, or PowerDOCS client installation, is not supported with the Omtool DMS Libraries.

Client requirements

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

- AccuRoute Desktop v2.2 or higher

- The DM client software, including the shell extensions **Windows Explorer DM Extension** and **Windows Desktop DM Extension**, must be installed on all client workstations

Supported DM versions

DM v5.1/v5.1.0.5 SR5

Section 3: Installation

This section includes:

Adding the DM connector

To add the DM connector to an AccuRoute server:

1   Right-click **CONNECTORS** in the console tree and select **NEW > DMS**. The License window appears.
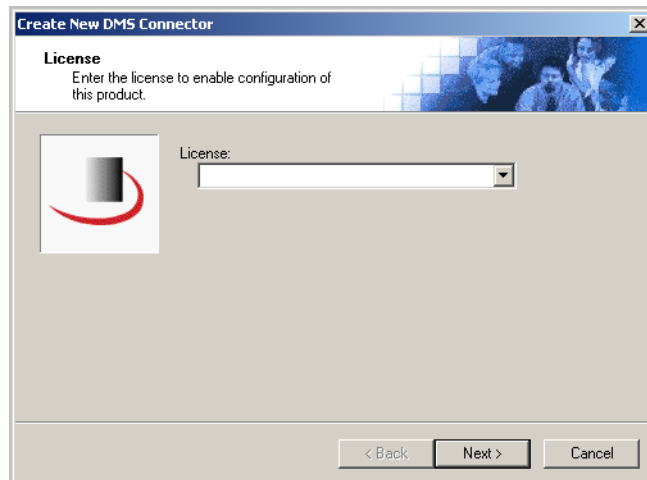
2   Type the license key for the DM connector in the **LICENSE** text box and click **NEXT**. The Display Name window appears.
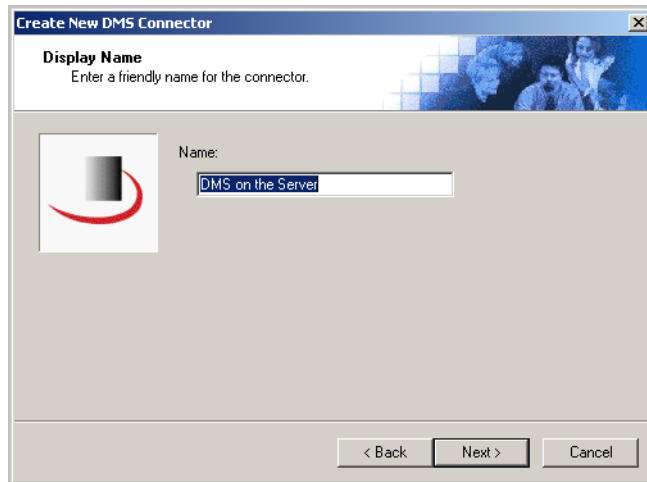
3   Type a friendly name for this connector in the **NAME** text box and click **NEXT**. The DMS Type window appears.
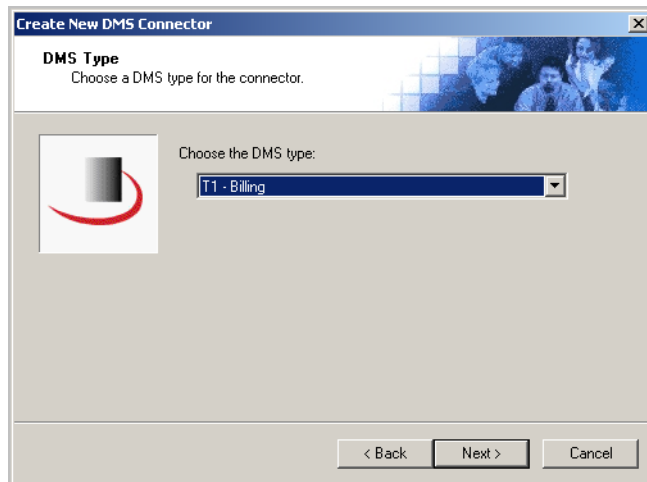
4   Select **T2 - DM** from the drop-down list and click **NEXT**. The Congratulations window appears.
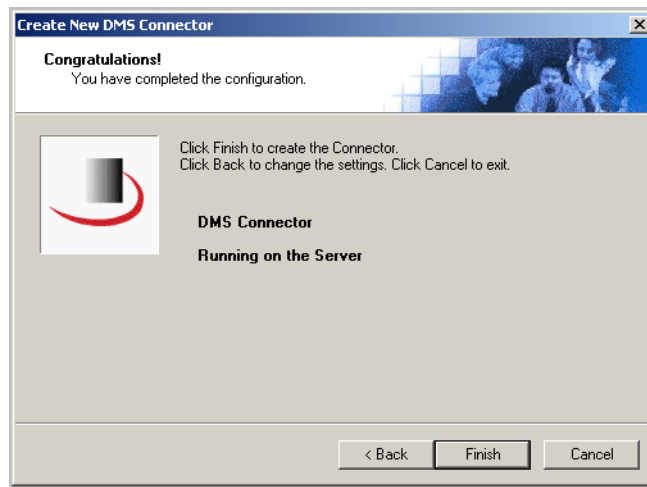
5   Click **FINISH**.

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

Continue to Completing the DM connector Configuration Wizard.

Completing the DM connector Configuration Wizard

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 DM connector

The Hummingbird DM Login Configuration window appears immediately after you complete the new connector wizard.

Figure 3-A: **Hummingbird DM Login Configuration window**

Select you authentication method on this window.

To complete the configuration wizard for a new DM connector:

1 Select an authentication option:

‣ **PROMPT FOR DM LOGIN OR USE WINDOWS AUTHENTICATION** - Select this option if the DM server should prompt the Omtool user for DM login credentials or accept the current user's Windows login credentials. (When Windows authentication is enabled on the DM server and this option is selected, the DM server accepts the current user's Windows login credentials automatically.)

‣ **ALWAYS USE THESE DM CREDENTIALS** - Select this option to connect to the DM server using specific login credentials. **NETWORK NAME** is optional unless you are using a NetWare Server. If you are using a NetWare Server, enter the name of the NetWare Server in this text box. Enter the user name and password in the **USER NAME**, **PASSWORD**, and **CONFIRM PASSWORD** text boxes.

If you are configuring the DMS connector on an AccuRoute server and the DM server has been configured to accept Windows authentication, you must select the **ALWAYS USE THESE DM CREDENTIALS** option and provide the login credentials for a DM account that can access all libraries and update all documents. (When the DM server has been configured to use Windows authentication, the AccuRoute server cannot obtain the user's DM login credentials or Windows login credentials.) This type of global access is required because the DMS connector, logged in as a DM user, must be able to locate the stub document (the stub document is a temporary document or placeholder for the document that is being routed to DM) and update it with the actual document being routed to DM.

If the DM server does not accept Windows authentication, Omtool strongly recommends that you provide the login credentials of a DM administrator or a DM user with administrative permissions. In rare circumstances when the AccuRoute server cannot obtain the DM login credentials of the AccuRoute Desktop user, the AccuRoute server presents these login credentials to DM. This reduces the possibility of an authentication failure.

2   Click **NEXT**. The Hummingbird DM Login Configuration window appears.
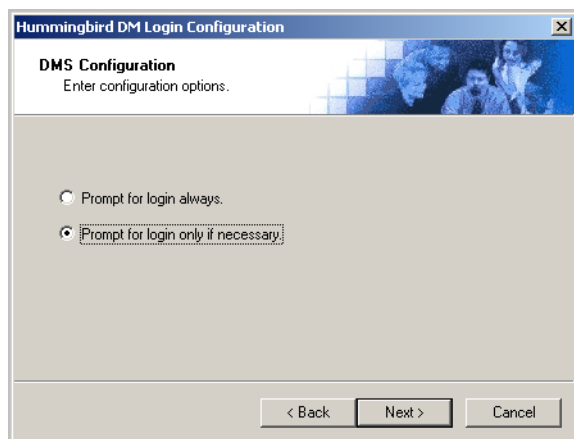
3   Select an authentication option and then click **NEXT**.

‣   **PROMPT FOR LOGIN ALWAYS** - Select this option if the DM server should always prompt the Omtool user for DM login credentials.

‣   **PROMPT FOR LOGIN ONLY IF NECESSARY** - Select this option if the DM server should prompt the Omtool user for DM login credentials only when necessary.

If you are configuring the DMS connector on an AccuRoute server, the option you select has no impact on document routing. When routing documents on behalf of an AccuRoute Desktop user, the server uses the DMS configuration data from the workstation where the user generated the Routing Sheet.

4   Click **NEXT**. The Hummingbird DM Libraries Configuration window appears.
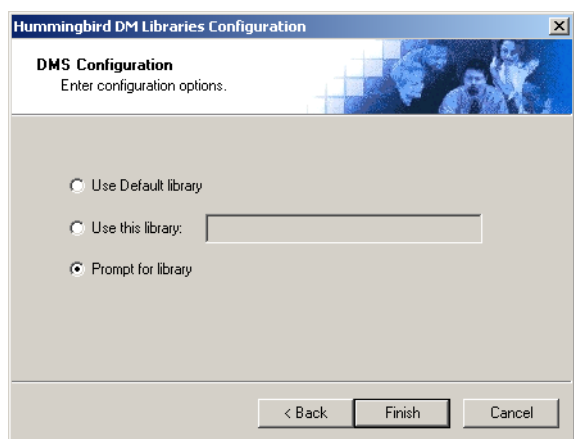
5   Specify the DM library where the Omtool user should save documents:

▸ **USE DEFAULT LIBRARY** - Select this option to save documents to the DM user's default library.

▸ **USE THIS LIBRARY** - Select this option to save documents to a particular library, and then enter the name of the library in the text box.

▸ **PROMPT FOR LIBRARY** - Select this option to prompt the DM user to select a library.

If you are configuring the DMS connector on an AccuRoute server, the option you select has no impact on document routing. When routing documents on behalf of an AccuRoute Desktop user, the server uses the DMS configuration data from the workstation where the user generated the Routing Sheet.

6   Click **FINISH**.

Configuring an existing DM connector

To complete the configuration wizard for an existing DM connector:

1   Click **CONNECTORS** in the console tree and double-click the **DM** connector in the details pane.

2   Click the **ADVANCED** tab.

3   Locate the DMS Configuration section and click **CONFIGURE**. The Hummingbird DM Login Configuration window appears.

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

Section 4: Required server configuration

If you have added support for DM 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 DM 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 the **ALLOW USER TO ROUTE TO LIST** and select **DM**.

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

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.

DM becomes available when you start AccuRoute Desktop again.

Section 5: Optional server configuration

This section includes:

Configuring final forms

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.
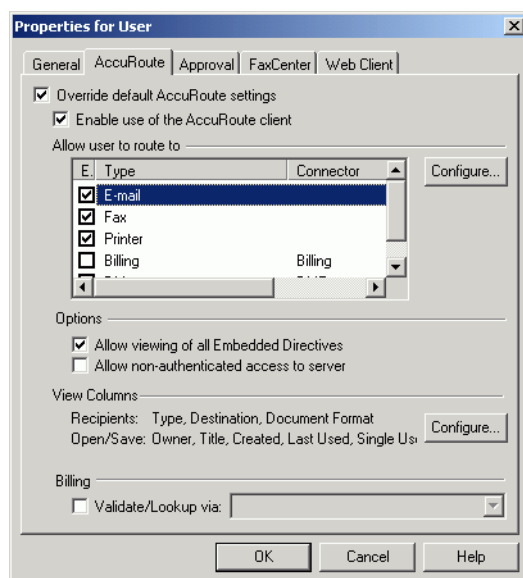
4   Click **CONFIGURE** and click the **FINAL FORMS** tab.

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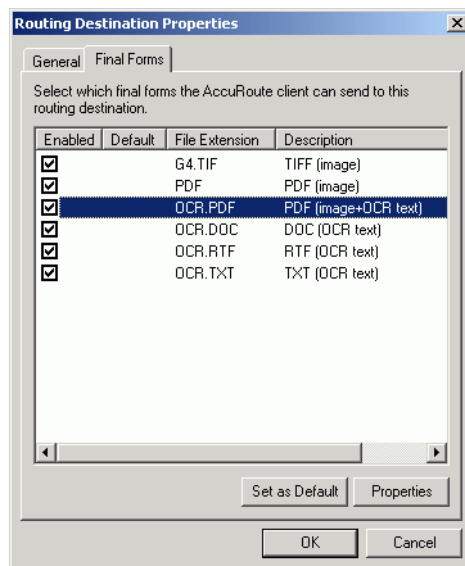
6   Click **PROPERTIES**.

7   Enter the new label for this document type in the **DESCRIPTION** field.
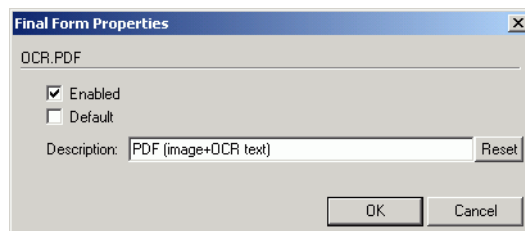
8   Click **OK** three times.

Repeat the above steps for every document type for every document type that requires modification.

Configuring document link

This section includes:

You must perform the tasks in this section prior to using the document link functionality.

Omtool provides you with the ability to generate a confirmation e-mail that includes an active link to the document stored in DM. Clicking the http link opens the document that was stored in DM 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
- AccuRoute Desktop v2.1 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 located 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. In the following example, the line is between the %JOB_ID% and %FAX_PAGE1% lines.

         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 %DATE_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%

Configuring Document Link with DM

Using Document Link with DM requires additional configuration.

Each user must go through the configuration of the DM provider in AccuRoute Desktop at least one time. This is required in order to install functionality that is needed for Document Link to work with DM files.

Section 6: Client configuration

This section includes:

Configuring AccuRoute Desktop

To add DM functionality to AccuRoute Desktop:

1   Start AccuRoute Desktop and log in.

2   Click **TOOLS** on the menu bar and select **CONFIGURE DMS**.

3   Select **DM** from the menu that appears. The Hummingbird DM Login Configuration window appears.

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

Continue to Client deployment methods.

Client deployment methods

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

- Configure AccuRoute Desktop to support DM 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 DM for client rollout.

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

Configuring DM 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 DM manually after you install AccuRoute Desktop.

> **To pre-configure the Omtool DMS Libraries for deployment:**
>
> 1   Install AccuRoute Desktop v2.2 on a workstation.
>
> 2   Configure the Omtool DMS Libraries to support DM. 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 v2.2 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 DM. When you are ready to deploy DM, launch setup.exe in the AccuRouteDesktop2.2 directory.

Configuring DM manually

> **To configure DM manually:**
>
> **AccuRoute Desktop -** (Go to Configuring AccuRoute Desktop on 6-1.) Follow these steps on all AccuRoute Desktop workstations.

Section 7: Optional billing configuration

This section includes:

To use billing when profiling your DM message, enable billing on the DM 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 DM connector:

1   Click **CONNECTORS** in the console tree, and double-click the **DM** connector.

2   Click the **ADVANCED** tab.

3   Go to the **BILLING** drop-down list, select either **BILLING SELECTABLE** or **BILLING MANDATORY**.

4   Configure the **AUTHOR**, **CLIENT**, and **MATTER** fields in the **FIELDS** section if applicable. 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   Change the Routing Identifier in the **ROUTING IDENTIFIER** text box if desired. It is populated with a default Routing Identifier.

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

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 DM connector, you need to enable billing for the default registered user and any individual registered users.

To enable Billing for registered users:

1   Click **REGISTERED USERS** in the console tree and double-click an individual user in the details pane, or right-click **REGISTERED USERS** in the console tree and select **USER DEFAULTS**.

2   Click the **ACCUROUTE** tab.

3   Select **VALIDATE/LOOKUP VIA**, and select the **DM** 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 8: Testing

To test the installation and configuration of Omtool DMS Libraries v2.2 for DM, send a message using AccuRoute Desktop.

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

To send a message to DM 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.
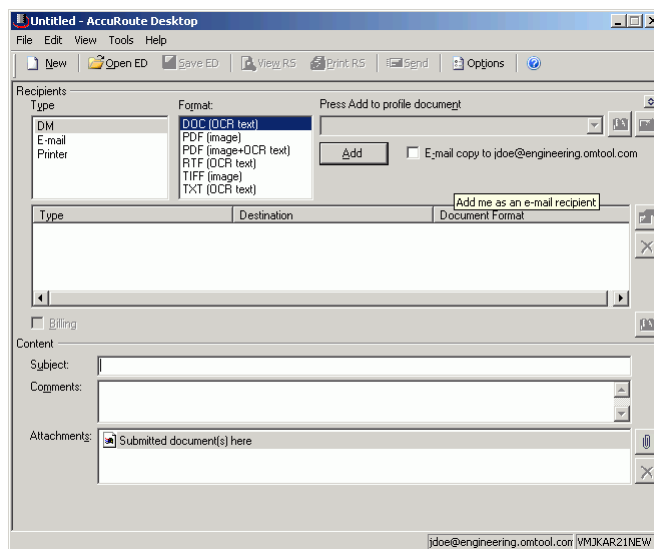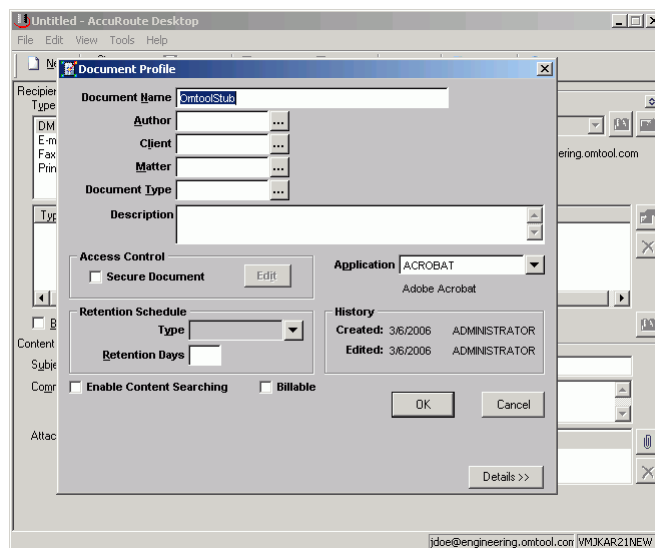

2   Select the destination type **DM** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.

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

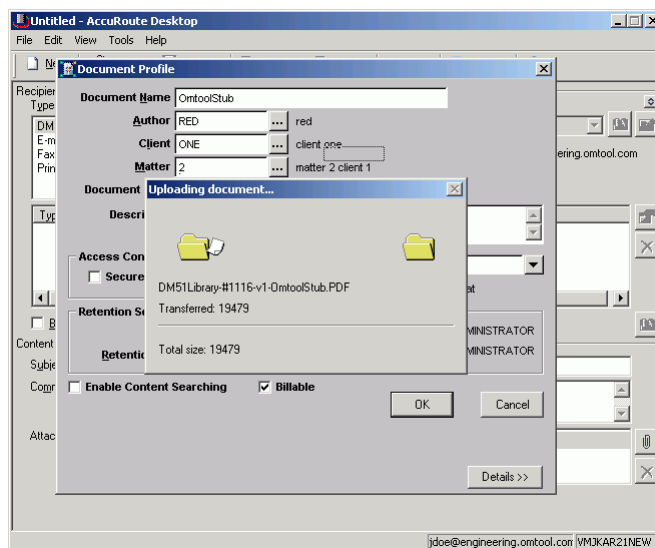**3** Click **ADD**. The Select Library window appears.
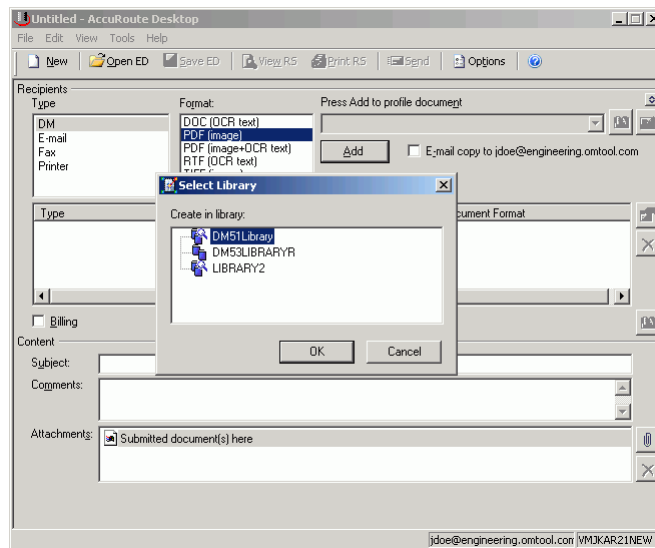
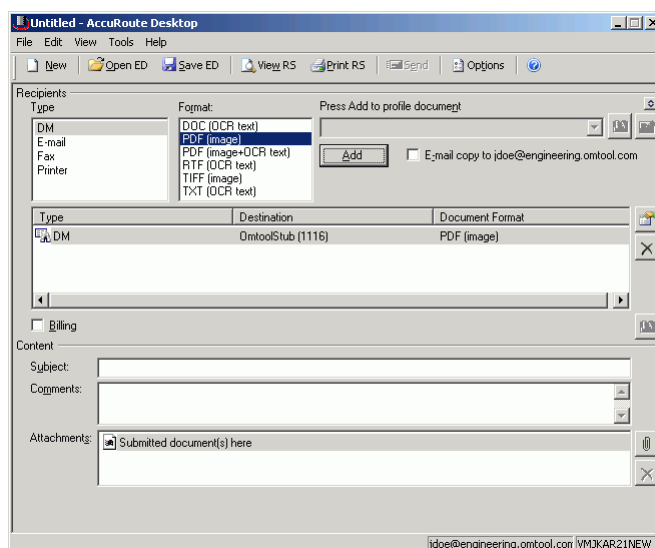**4** Select the appropriate DM library and click **OK**. The Document Profile window appears.

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

5 Complete the Document Profile window and click **OK**. The Uploading document window appears.


When the upload is complete, an OmtoolStub destination appears in the message.

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

6 Add content to your message.

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

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

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

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**.
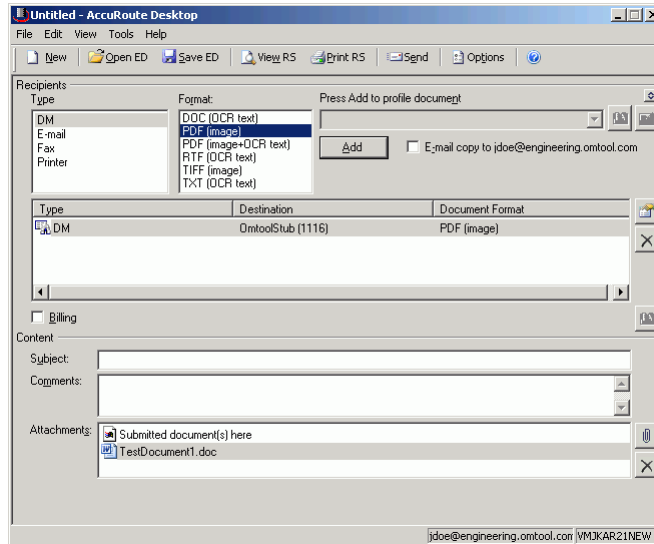
7   Do any of the following:

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 9: Troubleshooting

This section includes:

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

For information on troubleshooting DM, consult DM'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.
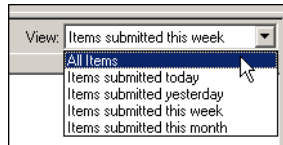
Start troubleshooting by trying to locate the message on the Omtool server.

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**.

View:	Items submitted this week ▾
All Items
Items submitted today
Items submitted yesterday
Items submitted this week
Items submitted this month

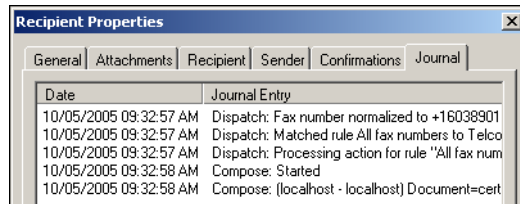   c   Sort all items by the date submitted.

   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.
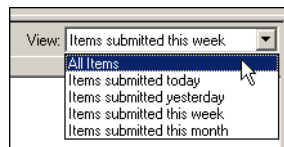

Also, check the Event Viewer for any information that might help troubleshoot the issue.

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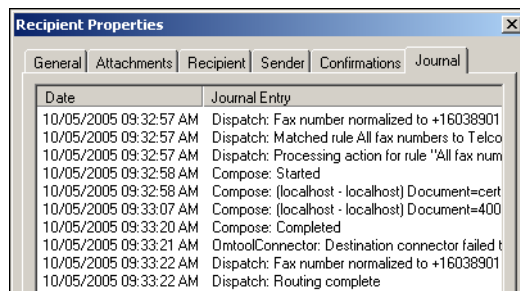
4   Look for the message in the History queue:

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