Omtool DMS Libraries v2.2 installation and integration guide for DOCS Open

For AccuRoute v2.1

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Section 1: Introduction

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

This section includes:

Omtool DMS Libraries integration with DOCS Open (1-1)

Installation components (1-1)

Deployment summary (1-2)

Release notes (1-2)

Related documentation (1-3)

Omtool DMS Libraries integration with DOCS Open

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

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

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

For more information on profiling documents to DOCS Open, go to Go to Section 8: Testing.

Installation components

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

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Deployment summary

To deploy Omtool DMS Libraries v2.2 for DOCS Open:

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. (Go to Section 7: Optional billing configuration.)
6. Test profiling a document into DOCS Open. (Go to Section 8: Testing.)
7. Troubleshoot the installation. Go to Section 9: Troubleshooting.

Release notes

Enhancements

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

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

Resolutions

Omtool DMS Libraries v2.2 for DOCS Open 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 required 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.)
- After populating the fields in the DOCS Open profile window, the billing fields on the AccuRoute Desktop client were not auto-populating. See Knowledge Base Article K03753. (Go to Online resources on the inside front cover.)

Limitations

Omtool DMS Libraries v2.2 for DOCS Open includes no known limitations.

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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 Hummingbird DOCS Open using AccuRoute Desktop - http://www.omtool.com/documentation/dmslibraries/v22/DOCSOpen/OmtoolDMSLibrariesV22DOCSOpenQuickStartGuide.pdf
- Administrator help - http://www.omtool.com/documentation/omtoolserver/v331/admin/

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Section 2: Requirements

This section includes:

Server requirements (2-1)

Client requirements (2-1)

Supported DOCS Open versions (2-1)

Server requirements

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

- AccuRoute v2.1
- The DOCS Open client software must be installed.
- The DOCS Open client software installed on the Omtool server must not integrate with Microsoft Word.
- Tier 2 DMS connector license
- AccuRoute Desktop v2.2 Update, which includes Omtool DMS Libraries v2.2, must be applied to the server.
- 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 DOCS Open client software must be installed.

Supported DOCS Open versions

DOCS Open v3.9

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Section 3: Installation

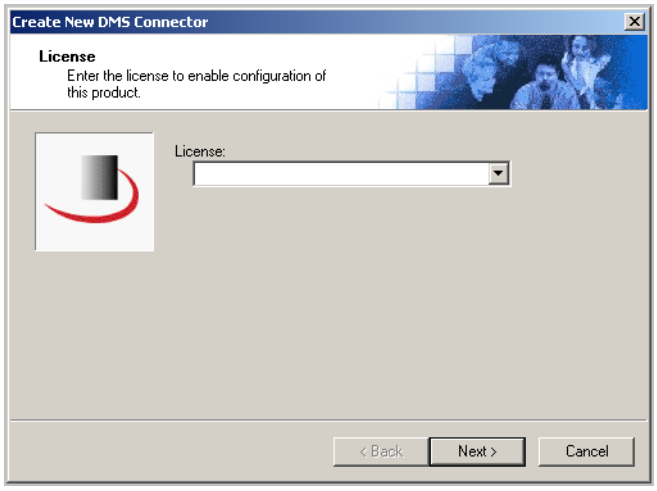
This section includes:

Adding the DOCS Open connector (3-1)
Completing the DOCS Open connector Configuration Wizard (3-3)

Adding the DOCS Open connector

To add the DOCS Open connector to an AccuRoute server:

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



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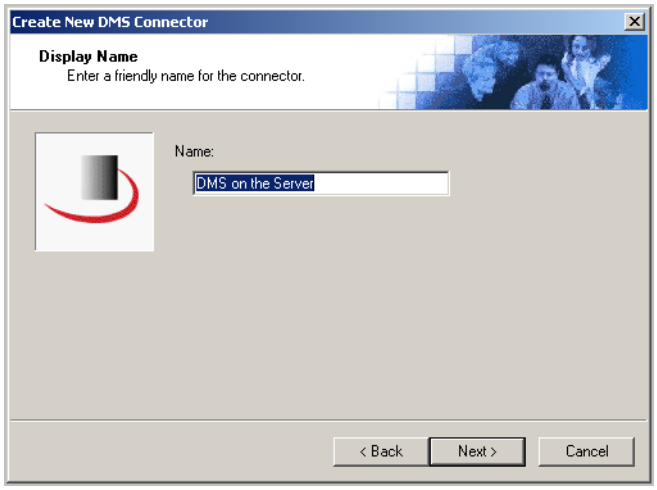
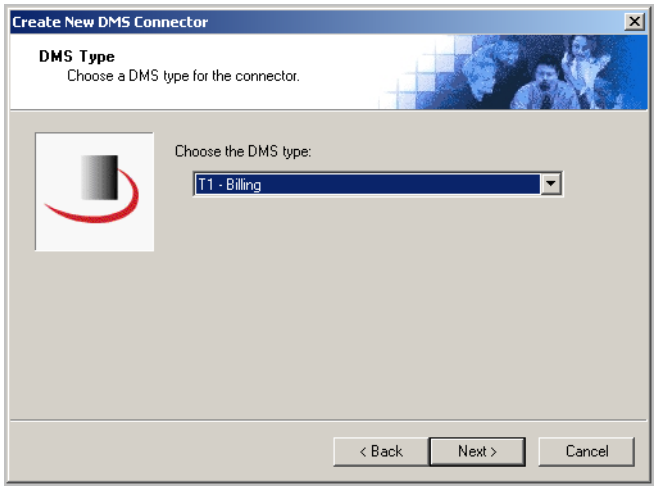
2 Type the license key for the DOCS Open connector in the **LICENSE** text box and click **NEXT**. The Display Name window appears.



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



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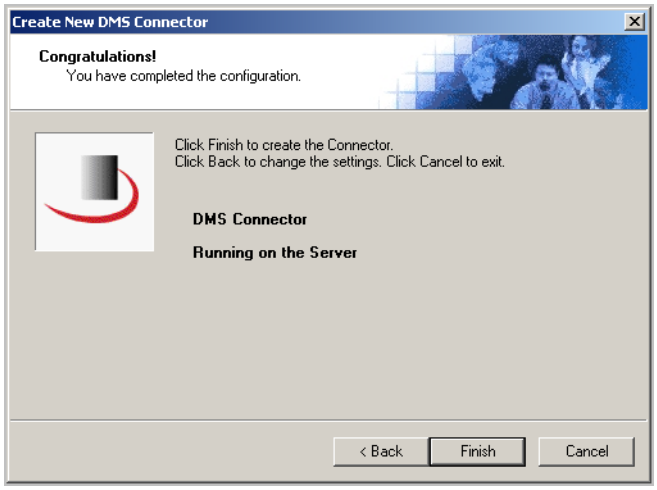
4 Select **T2 - DOCSOPEN** from the drop-down list and click **NEXT**. The Congratulations window appears.



5 Click **FINISH**.

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

Continue to Completing the DOCS Open connector Configuration Wizard.

Completing the DOCS Open connector Configuration Wizard

All Omtool applications on the same system share the Omtool DMS Libraries configuration (3-3)
Configuring a new DOCS Open connector (3-4)
Configuring an existing DOCS Open connector (3-5)

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.

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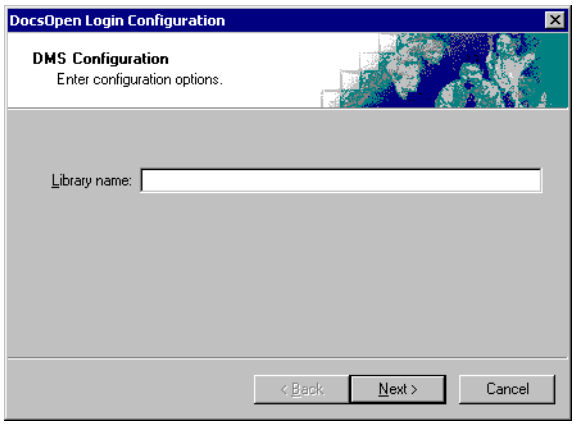
Configuring a new DOCS Open connector

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

Figure 3-A: **DocsOpen Login Configuration window**

Enter the DOCS Open llibrary name on this window.

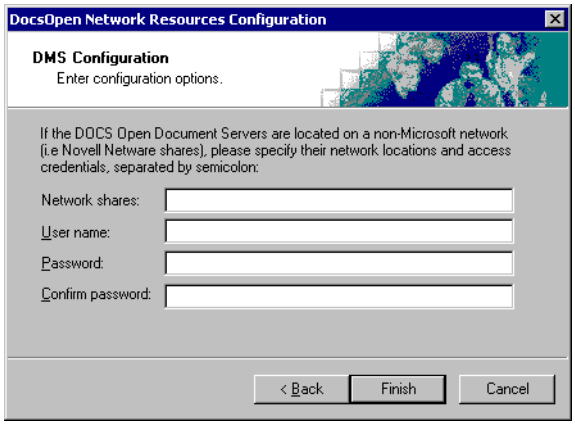


To complete the configuration wizard for a new DOCS Open connector:

1. Specify the DOCS Open library where the Omtool user should save documents. Type the name in the **LIBRARY NAME** text box.

   If you are configuring the DMS connector on an AccuRoute server, leave this field blank. 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.

2. Click **NEXT**. The DocsOpen Network Resources Configuration window appears.



3. If you are connecting to a shared drive that is not running Windows (for example, a Novell drive), enter the network locations in the **NETWORK SHARES** text box. You can enter multiple locations, separated by a semicolon.

4. Enter the shared drive that is not running Windows authentication information in the **USER NAME**, **PASSWORD**, and **CONFIRM PASSWORD** text boxes.

5. Click **FINISH**.

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Configuring an existing DOCS Open connector

To complete the configuration wizard for an existing DOCS Open connector:

1. Click **CONNECTORS** in the console tree, and double-click the **DOCS OPEN** connector in the details pane.
2. Click the **ADVANCED** tab.
3. Locate the **DMS CONFIGURATION** section, and click **CONFIGURE**. The DocsOpen Login Configuration window appears.
4. Perform steps one through five in Configuring a new DOCS Open connector (3-4).

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Section 4: Required server configuration

If you have added support for DOCS Open 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 DOCS Open 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 **DOCS OPEN**.
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.

DOCS Open becomes available when you start AccuRoute Desktop again.

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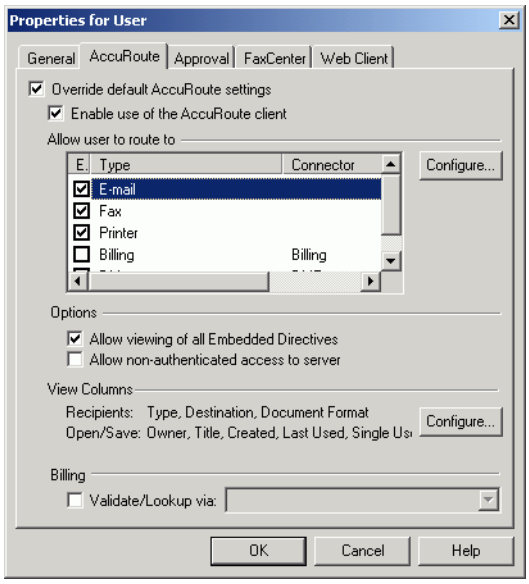
Section 5: Optional server configuration

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.



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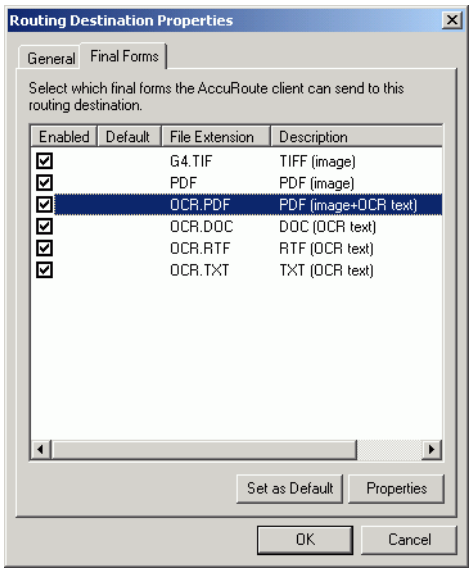
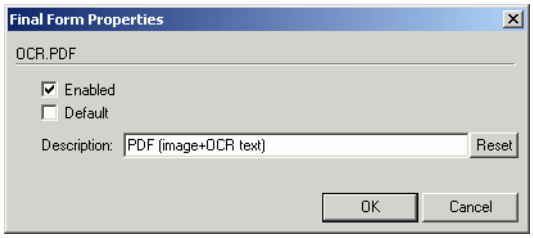
4 Click **CONFIGURE** and click the **FINAL FORMS** tab.

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.

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Section 6: Client configuration

This section includes:

Configuring AccuRoute Desktop (6-1)
Client deployment methods (6-1)

Configuring AccuRoute Desktop

To add DOCS Open functionality to AccuRoute Desktop:

1. Start AccuRoute Desktop and log in.
2. Click **TOOLS** on the menu bar and select **CONFIGURE DMS**.
3. Select **DOCSOPEN** from the menu that appears. The DocsOpen Login Configuration window appears.

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

When configuring DOCS Open within AccuRoute Desktop, you are prompted to enter a library name. If you do not enter a library name here, a login window displays that prompts you to select a library.

Continue to Client deployment methods.

Client deployment methods

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

- Configure AccuRoute Desktop to support DOCS Open 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 DOCS Open for client rollout.
- Install AccuRoute Desktop on each individual workstation and perform the configuration steps for DOCS Open manually. Continue to Configuring DOCS Open manually.

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Configuring DOCS Open 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 DOCS Open 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 DOCS Open. 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 the 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 DOCS Open. When you are ready to deploy DOCS Open, launch setup.exe in the AccuRouteDesktop2.2 directory.

Configuring DOCS Open manually

To configure DOCS Open manually:

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

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Section 7: Optional billing configuration

This section includes:

Enabling billing on the connector (7-1)

Enabling billing in the Billing component (7-2)

Enabling billing for registered users (7-2)

Automatic billing entry (7-2)

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

1. Click **CONNECTORS** in the console tree, and double-click the **DOCS OPEN** 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.

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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 DOCS Open 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 **DOCS OPEN** 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

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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.

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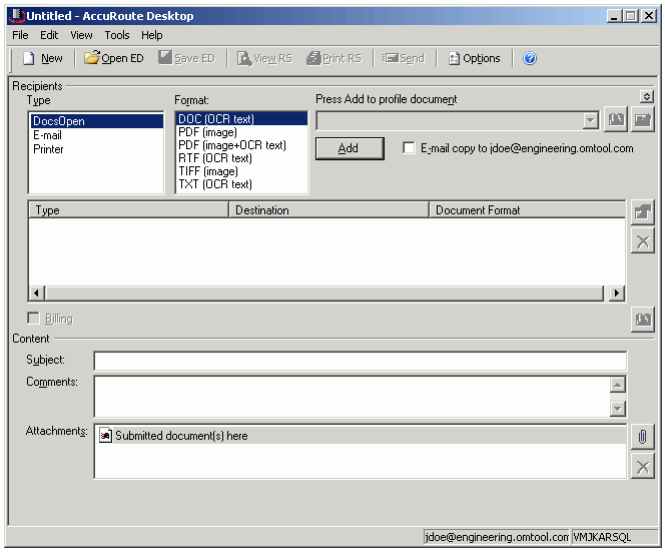
Section 8: Testing

To test the installation and configuration of Omtool DMS Libraries v2.2 for DOCS Open, 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 DOCS Open 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 **DOCSOPEN** 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.

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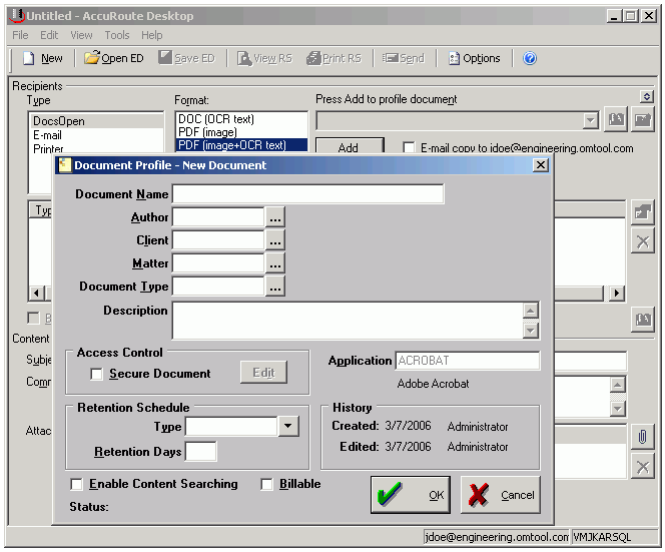
3 Click **ADD**. The Document Profile - New Document window appears.



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

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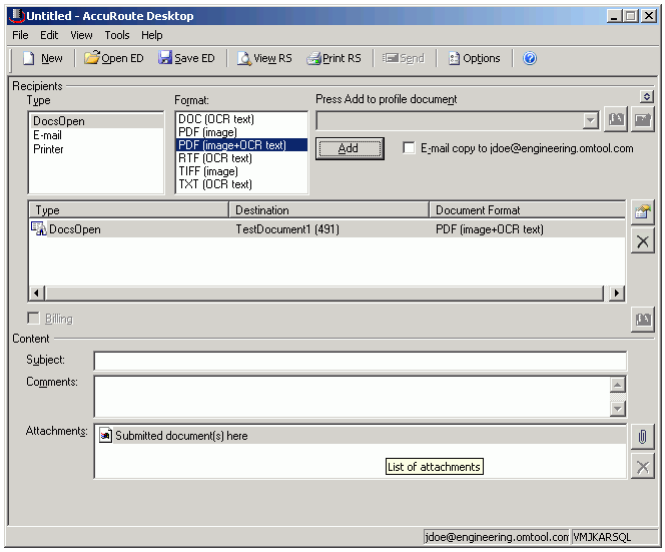
4 Complete the Document Profile window and click **OK**. An OmtoolStub destination appears in the message.



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

5 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**.

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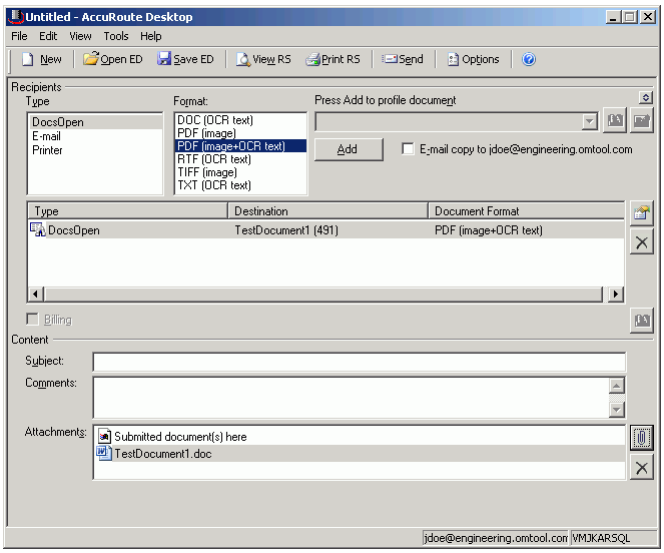

6 Do any of the following:

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.)

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Section 9: Troubleshooting

This section includes:

Detecting workflow issues (9-1)

Troubleshooting the delivery mechanism (9-1)

Troubleshooting the message on the Omtool server (9-2)

Troubleshooting the multifunction device (9-4)

Troubleshooting the client (9-4)

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

For information on troubleshooting DOCS Open, consult DOCS Open's documentation.

Continue to Troubleshooting the message on the Omtool server.

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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:

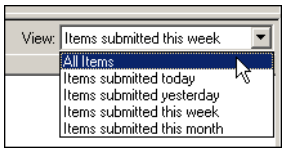
1 Start the Administrator.

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

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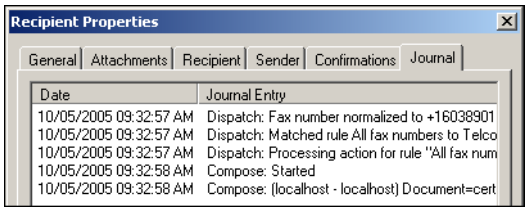
Omtool server stops processing the message (for example, the message seems to be stuck in a processing queue), restart all the Omtool services.

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.

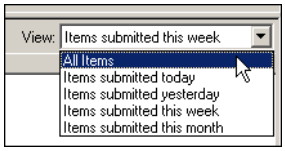


- **Message not found** - Go to step 4 and look for the message in the History queue.

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.

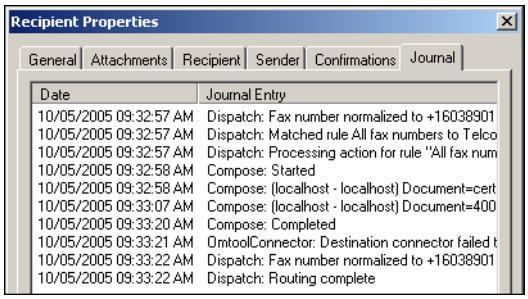
b View **ALL ITEMS**.



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 DOCS Open successfully. Do some advanced troubleshooting on DOCS Open to determine why the message is

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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 DOCS Open. If you are able to send messages to recipients other than DOCS Open and DOCS Open is operating correctly, contact Omtool. (Go to Customer service and technical support on the inside front cover.)

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