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

For AccuRoute v2.1

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Section I: Introduction

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

This section includes:

[DocuShare](#) (I-1)

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

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

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

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

Omtoo DMS Libraries integration with DocuShare

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

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

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

For more information on profiling documents to DocuShare, go to [Section 7: Testing](#)

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 DocuShare:

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

Release notes

Enhancements

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

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

Resolutions

Omtool DMS Libraries v2.2 for DocuShare 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 [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.

Limitations

Omtool DMS Libraries v2.2 for DocuShare do not include any 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 DocuShare using AccuRoute Desktop - <http://www.omtool.com/documentation/dmslibraries/v22/DocuShare/OmtoolDMSLibrariesV22DocuShareQuickStartGuide.pdf>
- Administrator help - <http://www.omtool.com/documentation/omtoolserver/v331/admin/>

Section 2: Requirements

This section includes:

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

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

[Supported DocuShare versions](#) (2-1)

Server requirements

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

- AccuRoute v2.1
- The DocuShare v4.0 or v3.9 Client, also called **Windows Desktop Client**, must be installed
- The DocuShare v4.0 or v3.9 Client 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

Client requirements

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

- AccuRoute Desktop v2.2 or higher
- The DocuShare v4.0 or v3.9 Client, also called **Windows Desktop Client**, must be installed

Supported DocuShare versions

DocuShare v4.0 by Xerox Corporation

Section 3: Installation

This section includes:

[Adding the DocuShare connector](#) (3-1)

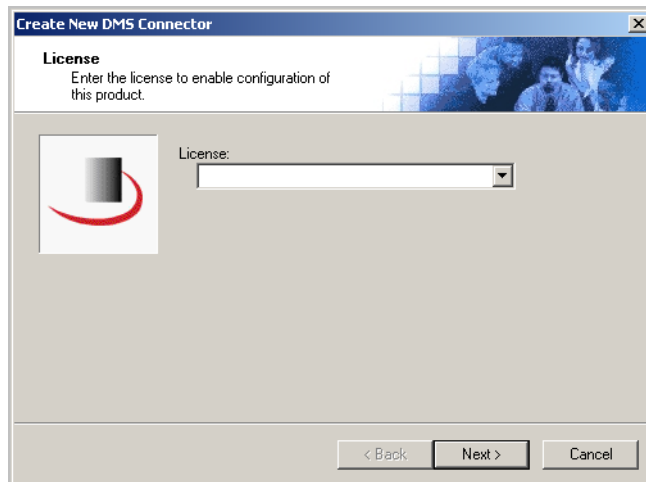
[Completing the DocuShare connector Configuration Wizard](#) (3-3)

Adding the DocuShare connector

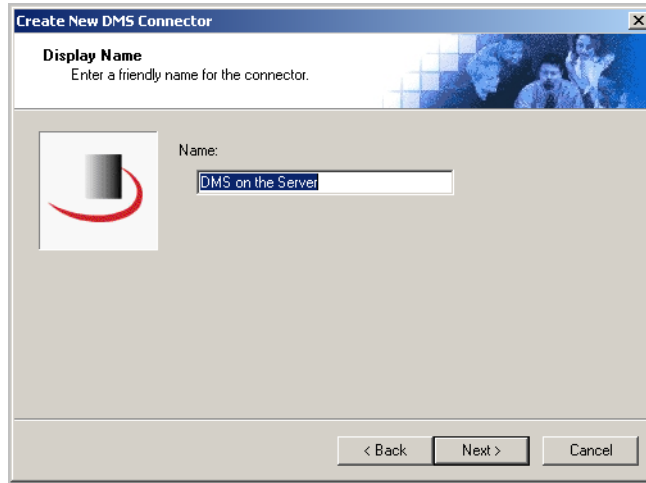
Note The Export Profile Information and Create Default Profile Information buttons are not applicable for the DocuShare DMS connector at this time.

To add the DocuShare connector to an AccuRoute server:

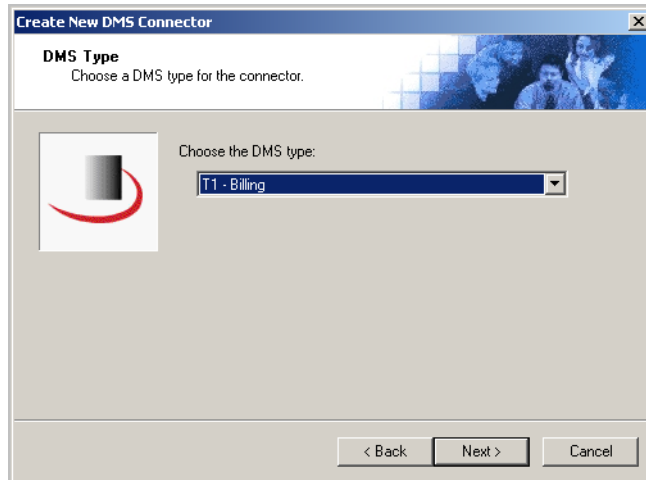
- I Right-click **CONNECTORS** in the console tree and select **NEW > DMS**. The License screen appears.



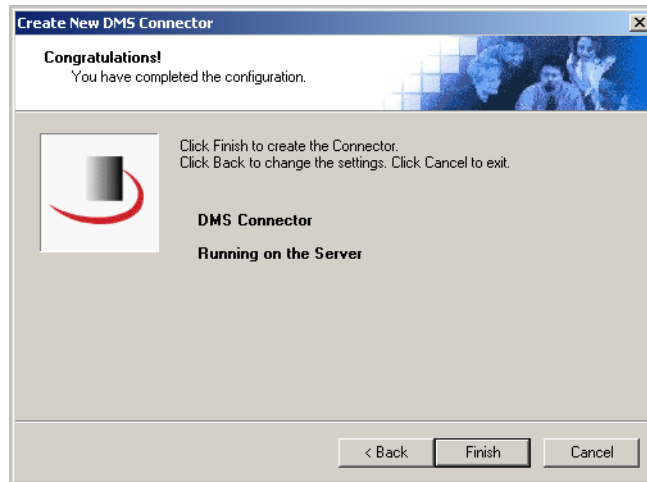
- 2 Type the license key for the DocuShare connector in the **LICENSE** text box and click **NEXT**. The Display Name screen appears.



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



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



- 5 Click **FINISH**.

The DMS configuration wizard launches and prompts you to configure the connector to support DocuShare. Continue to [Completing the DocuShare connector Configuration Wizard](#).

Completing the DocuShare connector Configuration Wizard

[All Omtool applications on the same system share the Omtool DMS Libraries configuration](#) (3-3)

[Configuring a new DocuShare connector](#) (3-4)

[Configuring an existing DocuShare connector](#) (3-6)

All Omtool applications on the same system share the Omtool DMS Libraries configuration

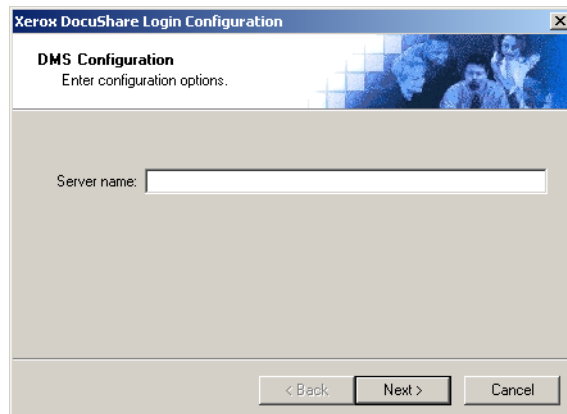
When multiple Omtool applications are installed on the same system, these applications share the same DMS configuration data. If you make changes to the DMS configuration settings for one Omtool application, those changes affect all Omtool applications installed on the system.

Configuring a new DocuShare connector

The Xerox DocuShare Login Configuration screen appears immediately after you complete the new connector wizard.

Figure 3-A: Xerox DocuShare Login Configuration screen

Enter the DocuShare server name on this window.



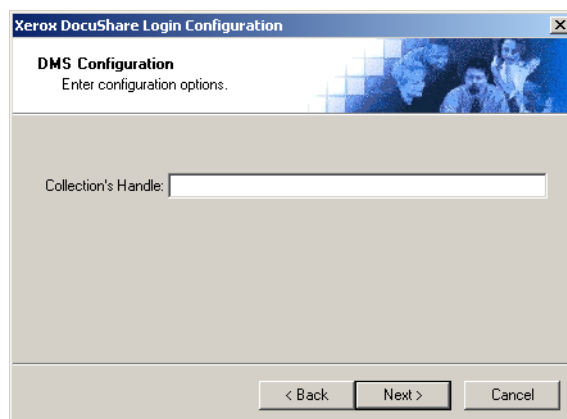
Note

When you installed the DocuShare Client, you were asked to connect (map) to a DocuShare server. During this mapping procedure, you entered the URL of the DocuShare server. The web address you enter in the Server name text box should be the same as the URL you used to map the DocuShare server.

To complete the configuration wizard for a new DocuShare connector:

- I Type the web address of the DocuShare server (for example, `http://server/docushare`) in the **SERVER NAME** text box, and click **NEXT**.

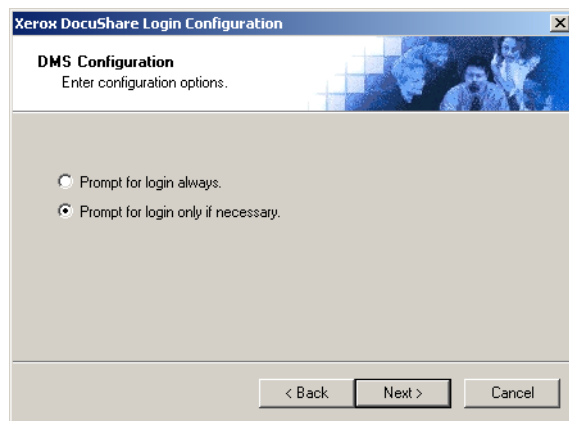
If you are configuring the DMS connector on an AccuRoute server, leave this field blank. You can leave this field blank because when you route documents on behalf of an AccuRoute Desktop, the server uses the DMS configuration data from the workstation where the user generated the Routing Sheet.



- 2 Identify the DocuShare collection where the Omtool user should save documents. Type the name of the DocuShare collection in the **COLLECTION'S HANDLE** text box and click **Next**. (Note that the collection handle is the name of the collection that appears in the DocuShare Client. For example: [Collection-10](#).)

Leave this field blank if you want DocuShare to prompt the Omtool user to select a collection. (This is recommended for users who save documents to more than one collection.)

If you are configuring the DMS connector on an AccuRoute server, you can 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.

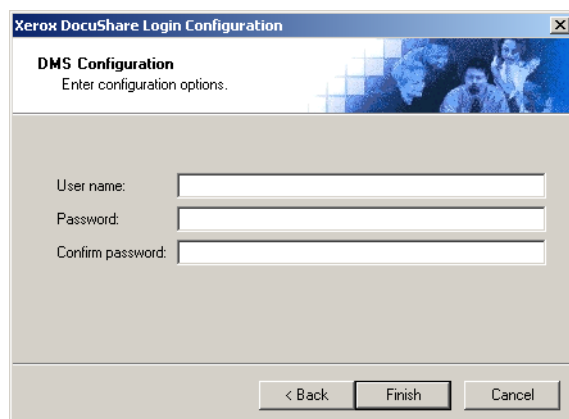


- 3 Select an authentication option and then click **NEXT**:

Prompt for login always - Select this option if the DocuShare server should always prompt the Omtool user for DocuShare login credentials.

Prompt for login only if necessary - Select this option if the DocuShare server should prompt the Omtool user for DocuShare 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 Specify the Omtool user's DocuShare login credentials. Enter the user name and password in the **USER NAME**, **PASSWORD**, and **CONFIRM PASSWORD** text boxes.
- 5 Click **FINISH**.

Configuring an existing DocuShare connector

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

To complete the configuration wizard for an existing DocuShare connector:

- 1 Click **CONNECTORS** in the console tree, and double-click the **DOCUSHARE** connector in the details pane.
- 2 Click the **ADVANCED** tab.
- 3 Locate the **DMS CONFIGURATION** section, and click **CONFIGURE**. The Xerox DocuShare Login Configuration screen appears.
- 4 Perform steps one through five in [Configuring a new DocuShare connector](#) (3-4).

Section 4: Required server configuration

If you have added support for DocuShare 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 DocuShare as a recipient type in AccuRoute Desktop:

- 1 Click **REGISTERED USERS** in the console tree and double-click an individual user in the details pane, or right-click **REGISTERED USERS** in the console tree and select **USER DEFAULTS**.
- 2 Click the **ACCURROUTE** tab.
- 3 Select **ENABLE USE OF THE ACCURROUTE CLIENT**.
- 4 Locate the **ALLOW USER TO ROUTE TO LIST** and select **DOCUSHARE**.
- 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.

DocuShare becomes available when you start AccuRoute Desktop again.

Section 4: Required server configuration

Section 5: Optional server configuration

This section includes:

[Configuring final forms](#) (5-1)

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

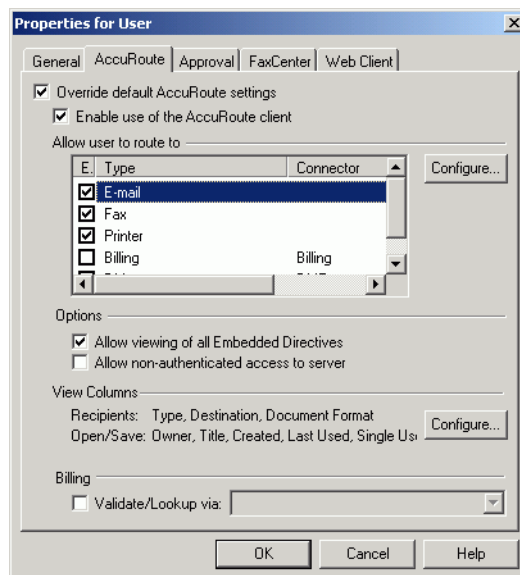
Configuring final forms

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.

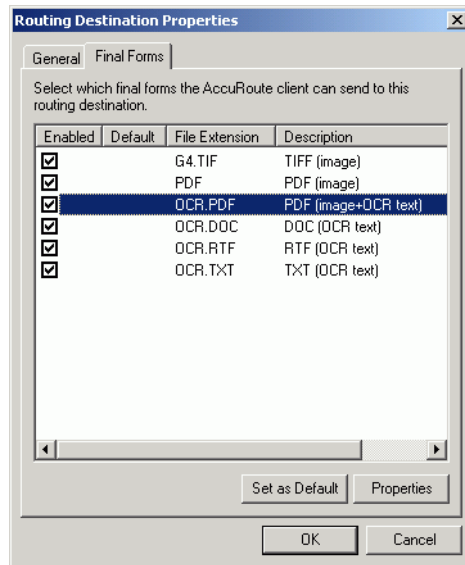
Tip If any individual users are registered on the AccuRoute server, complete this procedure once to modify user defaults and once for each individual user.

To change the label of a document type:

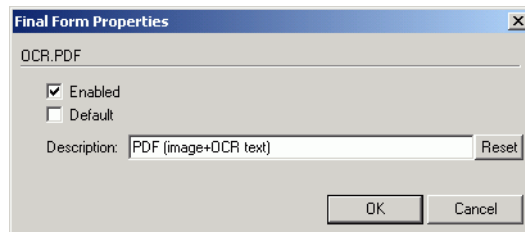
- 1 Click **REGISTERED USERS** in the console tree and double-click an individual user in the details pane, or right-click **REGISTERED USERS** in the console tree and select **USER DEFAULTS**.
- 2 Click the **ACCURROUTE** tab.
- 3 Highlight an item in the **ALLOW USER TO ROUTE TO** list.



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



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



- 8 Click **OK** three times.

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

Configuring document link

This section includes:

[Installing the Omtool Web Client](#) (5-3)

[Defining an outbound rule](#) (5-3)

[Customizing the notification template](#) (5-4)

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 DocuShare. Clicking the http link opens the document that was stored in DocuShare 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%
```

Section 6: Client configuration

This section includes:

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

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

Configuring AccuRoute Desktop

To add DocuShare functionality to AccuRoute Desktop:

- 1 Start AccuRoute Desktop and log in.
- 2 Click **TOOLS** on the menu bar and select **CONFIGURE DMS**.
- 3 Select **DOCUSHARE** from the menu that appears. The Xerox DocuShare Login Configuration screen appears.

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

When configuring DocuShare within AccuRoute Desktop, enter the Server name UNC path and the Collection Handle.

Continue to [Client deployment methods](#).

Client deployment methods

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

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

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

Configuring DocuShare manually

To configure DocuShare manually:

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

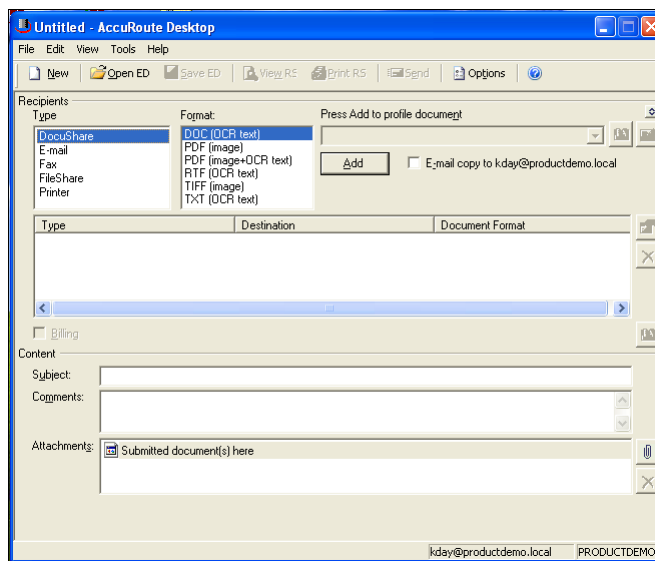
Section 7: Testing

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

For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to [Related documentation](#) on I-3.

To send a message to DocuShare using AccuRoute Desktop:

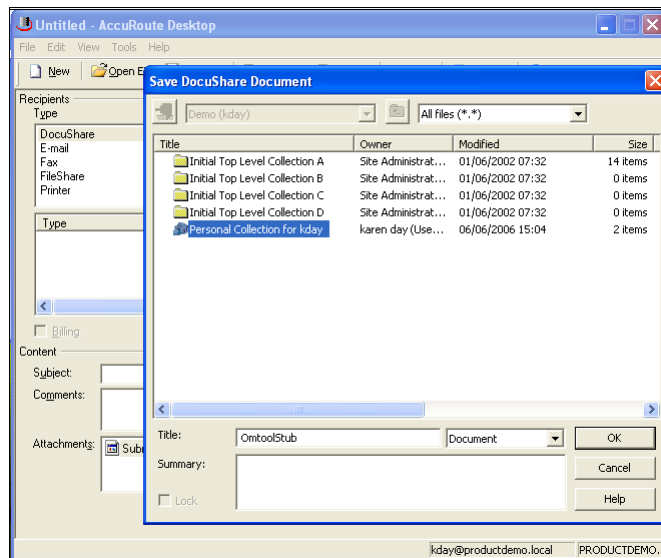
- 1 Start AccuRoute Desktop. Click **START**, go to the Omtool programs group, and select **ACCURROUTE DESKTOP**. Log in if prompted. The application appears on your desktop.



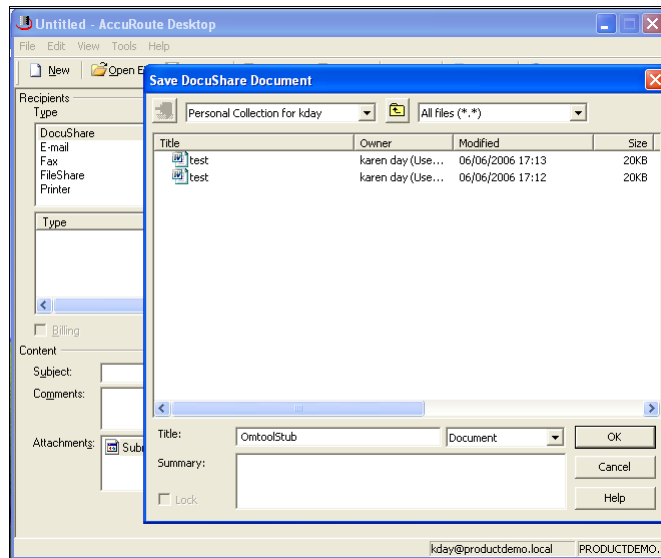
- 2 Select the destination type **DOCUSHARE** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.

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

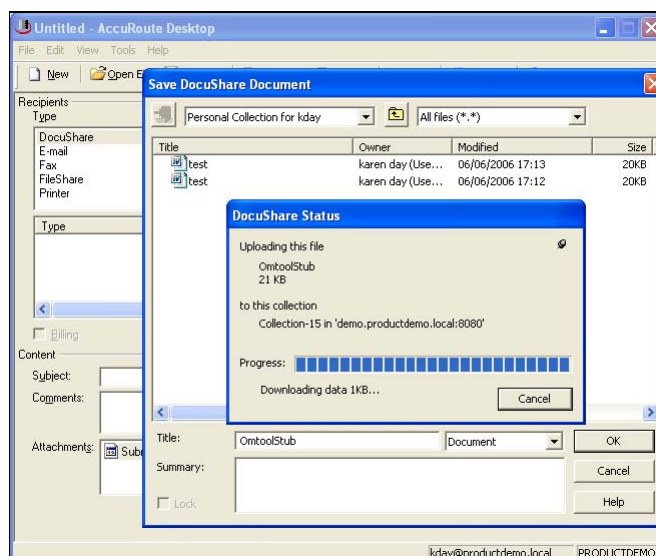
3 Click **ADD**. The Save DocuShare Document window appears.



4 Select the appropriate DocuShare collection and click **OK**. A list of files in the collection you selected is displayed.



- 5 Click **OK**. The DocuShare status window appears.



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

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

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

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

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

- 7 Do any of the following:

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

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

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

Section 8: Troubleshooting

This section includes:

[Detecting workflow issues](#) (8-1)

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

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

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

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

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

Detecting workflow issues

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

For information on troubleshooting DocuShare, consult DocuShare's documentation.

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

Troubleshooting the message on the Omtool server

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

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

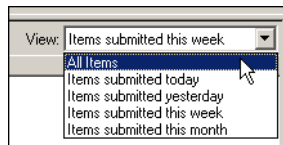
Start troubleshooting by trying to locate the message on the Omtool server.

To locate the message on the Omtool server:

- 1 Start the Administrator.
- 2 Go to **OMTOOL SERVER ADMINISTRATOR > [SERVERNAME] > MESSAGES.**
- 3 Look for the message in the In Process queue:

a Click **IN PROCESS.**

b View **ALL ITEMS.**



c Sort all items by the date submitted.

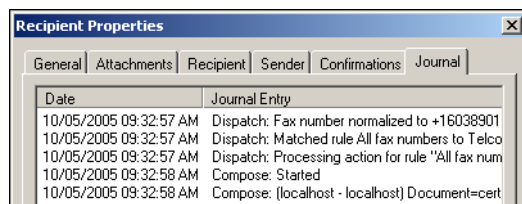
d Look for the message.

- **Message found** - Double-click the message and then click the **JOURNAL** tab to view the message journal to determine the current state and status of the message. Then monitor the components and confirm that the message is moving through the processing queues on the Omtool server. If the

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

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

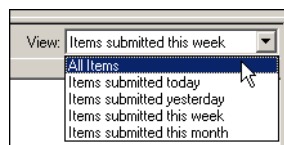
Also check the Event Viewer for any information that might help troubleshoot the issue.



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

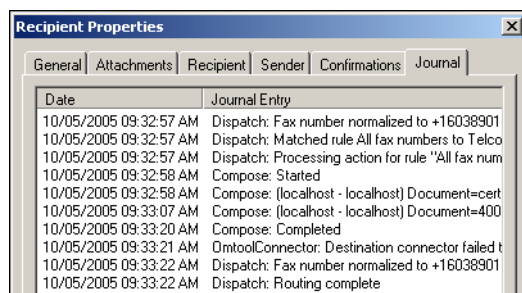
4 Look for the message in the History queue:

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



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

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



If the message failed, correct the issue and send the message again. Contact Omtool if you are unable to resolve the issue. (Go to [Customer service and technical support](#) on the inside front cover.)

If the journal states that Omtool server delivered the message but it still has not arrived at its destination, this indicates that the Omtool server transferred the message to DocuShare successfully. Do some advanced troubleshooting on DocuShare 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 DocuShare. If you are able to send messages to recipients other than DocuShare and DocuShare is operating correctly, contact Omtool. (Go to [Customer service and technical support](#) on the inside front cover.)