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

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Section I: Introduction

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

This section includes:

[Omtool DMS Libraries integration with LegalKEY](#) (I-1)

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

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

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

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

Omtool DMS Libraries integration with LegalKEY

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

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

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

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

Installation components

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

Note The instructions in this guide are applicable only if you are running Omtool

Deployment summary

To deploy Omtool DMS Libraries v2.2 for LegalKEY:

- 1 Complete the installation requirements. (Go to [Section 3: Installation](#).)
- 2 Complete required server configuration. (Go to [Section 4: Required server configuration](#).)
- 3 Complete any optional server configuration. (Go to [Section 5: Optional server configuration](#).)
- 4 Complete the client configuration. (Go to [Section 6: Client configuration](#).)
- 5 Test profiling a document into LegalKEY. (Go to [Section 7: Testing](#).)
- 6 Troubleshoot the installation. (Go to [Section 8: Troubleshooting](#).)

Release notes

Enhancements

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

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

Resolutions

Omtool DMS Libraries v2.2 for LegalKEY 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.)

Limitations

Omtool DMS Libraries v2.2 for LegalKEY 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 LegalKEY using AccuRoute Desktop - <http://www.omtool.com/documentation/dmslibraries/v22/LegalKEY/OmtoolDMSLibrariesV22LegalKEYQuickStartGuide.pdf>
- Administrator help - <http://www.omtool.com/documentation/omtoolserver/v331/admin/>

Section 2: Requirements

This section includes:

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

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

[Supported LegalKEY versions](#) (2-2)

Server requirements

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

- AccuRoute v2.2 which includes Omtool DMS Libraries v2.2

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

- Tier 2 DMS connector license

- The file `lkdmsvw4.exe` must reside in `C:\WINDOWS\system32` on the AccuRoute server and all systems running the AccuRoute Desktop.

Note This requirement applies only when using AccuRoute to create a Routing Sheet with a LegalKey destination. It does not apply when printing an AccuRoute Routing Sheet from LegalKey Attorney Desktop.)

To install `lkdmsvw4.exe`

Run the LegalKey common components installation.

The default location of this installer is:

`http://<LegalKey_server_name>/attydisk4/DL/lkdmsvw4_inst.exe`

Alternately, you can copy this file to `\WINDOWS\system32` and register it manually.

Client requirements

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

- AccuRoute Desktop v2.2 or higher
- The file lkdmsvw4.exe must reside in C:\WINDOWS\system32 on the AccuRoute server and all systems running the AccuRoute Desktop. (Note that this requirement applies only when using AccuRoute to create a Routing Sheet with a LegalKey destination. It does not apply when printing an AccuRoute Routing Sheet from LegalKey Attorney Desktop.)

Install this file by running the LegalKey common components installation. The default location of this installer is:

http://<LegalKey_server_name>/attydisk4/DL/lkdmsvw4_inst.exe.

(As an alternative, you can copy this file to \WINDOWS\system32 and register it manually.)

- FaxCenter and Swiftwriter do not support LegalKEY.

Supported LegalKEY versions

- LegalKEY v4.12. For later versions, contact Omtool Technical Support. (Go to [Customer service and technical support](#) on the inside front cover.)

Section 3: Installation

This section includes:

[Identifying LegalKEY pickup and drop folders](#) (3-1)

[Adding the LegalKEY connector](#) (3-3)

[Completing the LegalKEY connector Configuration Wizard](#) (3-5)

Identifying LegalKEY pickup and drop folders

Before configuring the Omtool DMS Libraries to support LegalKEY, identify the folders that are required to complete the configuration

Continue to [LegalKey Imaging Agent drop folder \(required for DMS connector configuration\)](#)..

LegalKey Imaging Agent drop folder (required for DMS connector configuration)

Identify the LegalKey Imaging Agent drop folder that was created during the LegalKEY installation. If you don't know the location of the LegalKey Imaging Agent drop folder, contact your LegalKEY administrator.

When an AccuRoute user sends a document that should be routed to LegalKEY, the AccuRoute server prepares the document and delivers it to the LegalKey Imaging Agent drop folder. The LegalKEY Imaging Agent detects the document and retrieves it from the LegalKey Imaging Agent drop folder, so that the LegalKEY records management system can save the document.

Continue to [AccuRoute pickup folder \(required for AccuRoute Desktop configuration\)](#).

AccuRoute pickup folder (required for AccuRoute Desktop configuration)

Choose or create a folder that serves as the AccuRoute Desktop pickup folder.

When an AccuRoute Desktop user profiles a document in LegalKEY, LegalKEY writes an XML file with all the required document routing data and deposits the XML file in this folder. AccuRoute Desktop immediately detects the XML file in this folder, retrieves it, and uses the data to generate a Routing Sheet.

The following requirements apply to the AccuRoute Desktop pickup folder:

- The folder location must be represented by a UNC path (\\computer\folder) or a drive mapping (X:\folder\folder).

- All workstations running AccuRoute Desktop must be configured to use the same UNC path or drive mapping. Consider these examples:

For example, if you want to use the UNC path `\\Omtool\AccuRouteDesktopPickUp`, then all workstations must be configured to use `\\Omtool\AccuRouteDesktopPickUp`.

For example, if you want to use the drive mapping `E:\Omtool\AccuRouteDesktopPickUp`, then all workstations must be configured to use the drive mapping `E:\Omtool\AccuRouteDesktopPickUp`.

Note that the UNC path implies that all workstations running AccuRoute Desktop use the same AccuRoute Desktop pickup folder. On the other hand, the drive mapping indicates two possibilities—that all workstations are connected to the same network share via an identical drive mapping, or that the AccuRoute Desktop pickup folder exists on a drive that is local to the workstation. Either scenario satisfies this requirement.

- The folder must exist in the LAN prior to the configuration of the application.
- The folder must allow the Windows user running AccuRoute Desktop to write files. (If the folder services more than one Windows user, then all applicable Windows users require write permissions.)

Note The `lkeydb` database on the LegalKEY server must be configured with the same UNC path or drive mapping. To troubleshoot the configuration, verify the value of the `omtool_pickup_filepath` property in the `master_adt_settings` table.

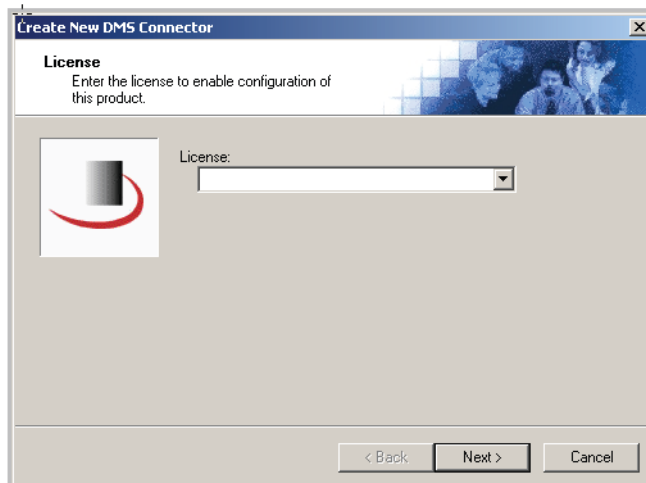
Continue to [Adding the LegalKEY connector](#).

Adding the LegalKEY connector

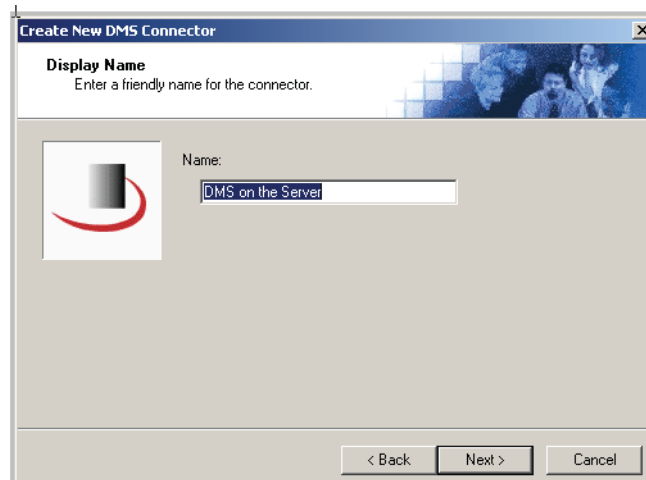
Note The Export Profile Information and Create Default Profile Information buttons are not applicable for the LegalKEY DMS connector at this time.

To add the LegalKEY connector to an AccuRoute server:

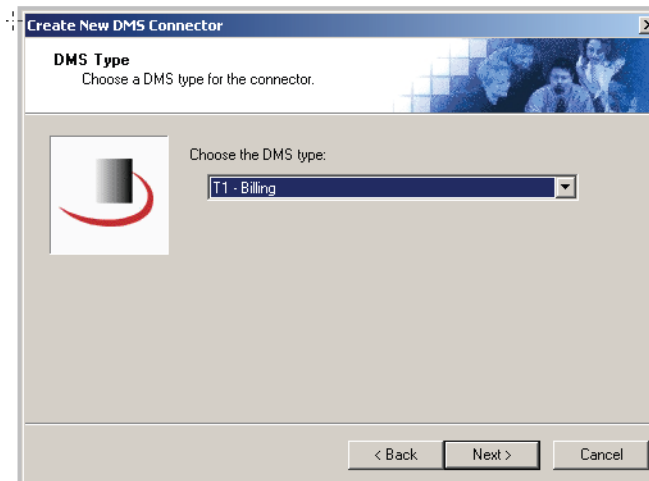
- 1 Right-click **CONNECTORS** in the console tree and select **NEW > DMS**. The License window appears.



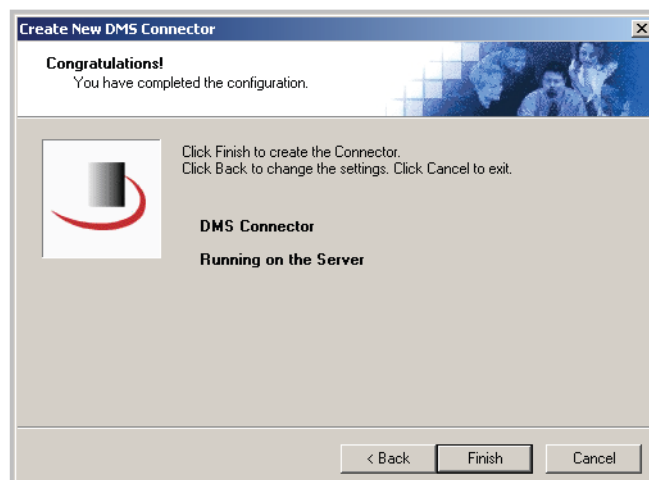
- 2 Type the license key for the LegalKEY connector in the **LICENSE** text box and click **NEXT**. The Display Name window appears.



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



- 4 Select **T2 - LEGALKEY** 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 LegalKEY. Continue to [Completing the LegalKEY connector Configuration Wizard](#).

Completing the LegalKEY connector Configuration Wizard

[All Omtool applications on the same system share the Omtool DMS Libraries configuration](#) (3-5)

[Configuring a new LegalKEY connector](#) (3-5)

[Configuring an existing LegalKEY connector](#) (3-7)

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 LegalKEY connector

Note Billing is not supported for LegalKEY, therefore, the billing field names on the connector will be empty.

The LegalKEY ADT Connection Configuration window appears immediately after you complete the new connector wizard.

Figure 3-A: LegalKEY ADT Connection Configuration window

Specify the location of the Attorney Desktop and then select a login option on this window.

LegalKEY ADT Connection Configuration

Login Information

ADT URL address:

Prompt for ADT user

Always use this ADT user:

< Back Next > Cancel

To complete the configuration wizard for a new LegalKEY connector:

- 1 Specify the location of the Attorney Desktop and then select a login option.

To specify the location of the Attorney Desktop: Type the web address of LegalKEY Attorney Desktop in the **ADT URL ADDRESS** text box.

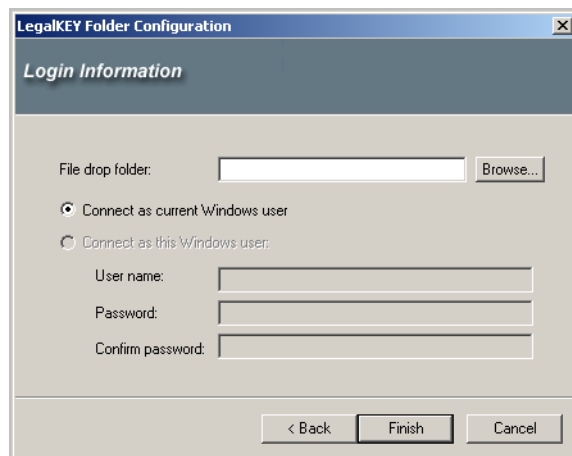
To select a login option, do one of the following:

PROMPT FOR ADT USER - Select this option if LegalKEY Attorney Desktop should prompt the user to log in (recommended for multiple-user workstations).

ALWAYS USE THIS ADT USER - Select this option to connect to LegalKEY Attorney Desktop using a specific login ID and type the user name in the text box.

If you are configuring the DMS connector on the AccuRoute server to support your company's DMS application, Omtool strongly recommends that you provide the login credentials of an administrator to the DMS application or a user with administrative permissions. In rare circumstances when the AccuRoute server cannot obtain the login credentials of the AccuRoute Desktop user, the AccuRoute server presents these login credentials to the DMS application. This reduces the possibility of an authentication failure.

- 2 Click **NEXT**.



The screenshot shows a dialog box titled "LegalKEY Folder Configuration" with a close button (X) in the top right corner. The dialog has a "Login Information" section. It contains a "File drop folder:" label followed by a text input field and a "Browse..." button. Below this are two radio button options: "Connect as current Windows user" (which is selected) and "Connect as this Windows user:". Under the second option, there are three text input fields labeled "User name:", "Password:", and "Confirm password:". At the bottom of the dialog, there are three buttons: "< Back", "Finish", and "Cancel".

- 3 Indicate the location of the LegalKey Imaging Agent drop folder and select a Windows authentication option.

To indicate the location of the LegalKey Imaging Agent drop folder: Type the UNC path to the LegalKey Imaging Agent drop folder in the **FILE DROP FOLDER** text box. (See [LegalKey Imaging Agent drop folder \(required for DMS connector configuration\)](#) (3-1).)

To select a Windows authentication option, do one of the following:

CONNECT AS CURRENT WINDOWS USER - Select this option if you want the Omtool application to connect to the folder using the current Windows user's login credentials.

CONNECT AS THIS WINDOWS USER - Select this option if you want the Omtool application to connect to the folder using specific Windows login credentials, and then type the user name and password in the **USER NAME**, **PASSWORD**, and **CONFIRM PASSWORD** text boxes.

If you are configuring the DMS connector on the AccuRoute server, Omtool strongly recommends that you select **CONNECT AS THIS WINDOWS USER** and provide the login credentials of an administrator to the DMS application or a user with administrative permissions. In rare circumstances when the AccuRoute server cannot obtain the login credentials of the AccuRoute Desktop user, the AccuRoute server presents these login credentials to the DMS application. This reduces the possibility of an authentication failure.

Remember that the Windows user connecting to the folder must have read and write security permissions.

- 4 Click **FINISH**.

Configuring an existing LegalKEY connector

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

To complete the configuration wizard for an existing LegalKEY connector:

- 1 Click **CONNECTORS** in the console tree, and double-click the **LEGALKEY** connector in the details pane.
- 2 Click the **ADVANCED** tab.
- 3 Locate the **DMS CONFIGURATION** section and click **CONFIGURE**. The LegalKEY ADT Connection Configuration window appears.
- 4 Perform steps one through four in [Configuring a new LegalKEY connector](#) (3-5).

Section 4: Required server configuration

This section includes:

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

Enabling LegalKEY as a recipient type in AccuRoute Desktop

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

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

Now when you start AccuRoute Desktop, LegalKEY is available.

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

Section 5: Optional server configuration

This section includes:

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

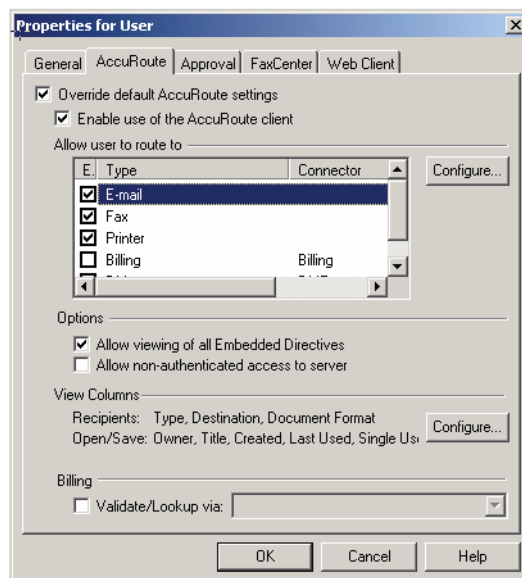
Changing the label of a document

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

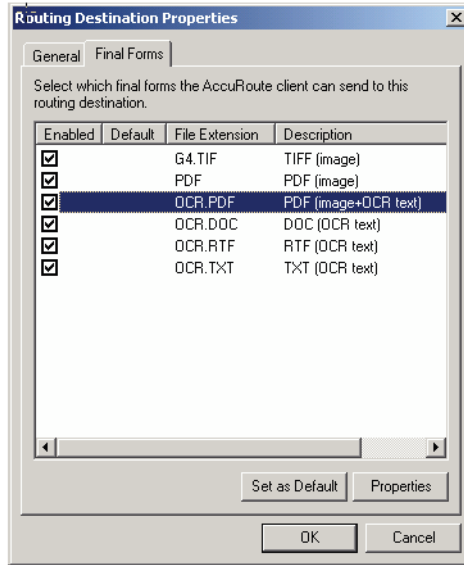
Tip If any individual users are registered on the AccuRoute server, complete this procedure once to modify user defaults and once for each individual user.

To change the label of a document type

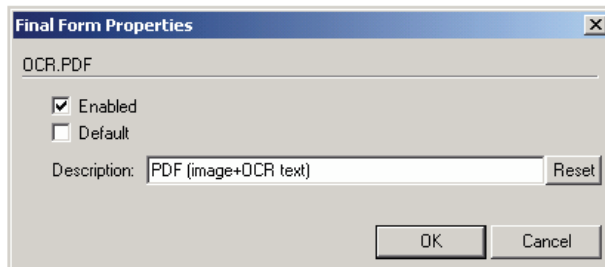
- 1 Click **REGISTERED USERS** in the console tree and double-click an individual user in the details pane, or right-click **REGISTERED USERS** in the console tree and select **USER DEFAULTS**.
- 2 Click the **ACCURROUTE** tab.
- 3 Highlight an item in the ALLOW USER TO ROUTE TO list.



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



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



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

Section 6: Client configuration

This section includes:

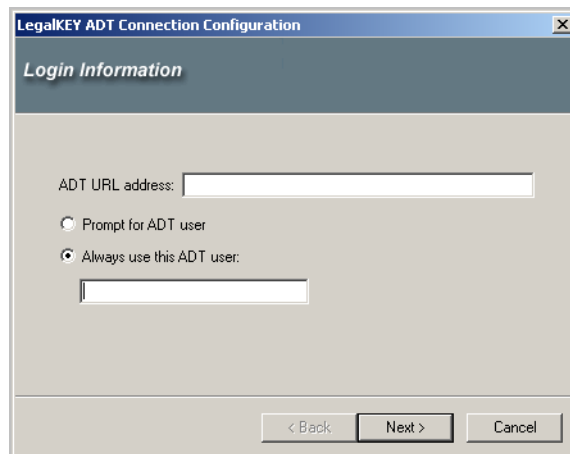
[Configuring AccuRoute Desktop](#) (6-1)

[Client deployment methods](#) (6-3)

Configuring AccuRoute Desktop

To add LegalKEY functionality to AccuRoute Desktop:

- 1 Start AccuRoute Desktop and log in.
- 2 Click **TOOLS** on the menu bar and select **CONFIGURE DMS**.
- 3 Select **LEGALKEY** from the menu that appears. The LegalKEY ADT Connection Configuration window appears.



LegalKEY ADT Connection Configuration

Login Information

ADT URL address:

Prompt for ADT user

Always use this ADT user:

< Back Next > Cancel

- 4 Specify the location of the Attorney Desktop and select a login option.

To specify the location of the Attorney Desktop: Type the web address of LegalKEY Attorney Desktop in the **ADT URL ADDRESS** text box.

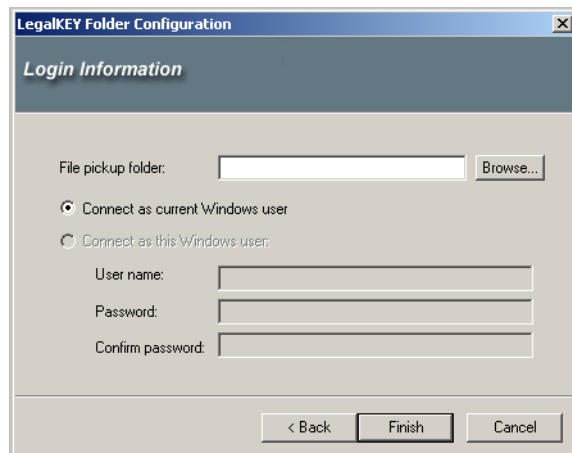
To select a login option, do one of the following:

PROMPT FOR ADT USER - Select this option if LegalKEY Attorney Desktop should prompt the user to log in (recommended for multiple-user workstations).

ALWAYS USE THIS ADT USER - Select this option to connect to LegalKEY Attorney Desktop using a specific login ID and type the user name in the text box.

If you are configuring the DMS connector on the AccuRoute server to support your company's DMS application, Omtool strongly recommends that you provide the login credentials of an administrator to the DMS application or a user with administrative permissions. In rare circumstances when the AccuRoute server cannot obtain the login credentials of the AccuRoute Desktop user, the AccuRoute server presents these login credentials to the DMS application. This reduces the possibility of an authentication failure.

- 5 Click **NEXT**. The LegalKEY Folder Configuration window appears.



The screenshot shows a window titled "LegalKEY Folder Configuration" with a sub-header "Login Information". The window contains the following fields and controls:

- "File pickup folder:" followed by a text input field and a "Browse..." button.
- Two radio button options:
 - Connect as current Windows user
 - Connect as this Windows user:
- "User name:" followed by a text input field.
- "Password:" followed by a text input field.
- "Confirm password:" followed by a text input field.
- At the bottom, three buttons: "< Back", "Finish", and "Cancel".

- 6 Indicate the location of the AccuRoute Desktop pickup folder and select a Windows authentication option.

To indicate the location of the AccuRoute Desktop pickup folder: Type the UNC path or drive mapping that identifies the location of the AccuRoute Desktop pickup folder in the **FILE PICKUP FOLDER** text box. (See [AccuRoute pickup folder \(required for AccuRoute Desktop configuration\)](#) (3-1))

To select a Windows authentication option, do one of the following:

CONNECT AS CURRENT WINDOWS USER - Select this option if you want the Omtool application to connect to the folder using the current Windows user's login credentials.

CONNECT AS THIS WINDOWS USER - Select this option if you want the Omtool application to connect to the folder using specific Windows login credentials, and then type the user name and password in the **USER NAME**, **PASSWORD**, and **CONFIRM PASSWORD** text boxes.

If you are configuring the DMS connector on the AccuRoute server, Omtool strongly recommends that you select **CONNECT AS THIS WINDOWS USER** and provide the login credentials of an administrator to the DMS application or a user with administrative permissions. In rare circumstances when the AccuRoute server cannot obtain the login credentials of the AccuRoute Desktop user, the AccuRoute server presents these login credentials to the DMS application. This reduces the possibility of an authentication failure.

Remember that the Windows user connecting to the folder must have read and write security permissions.

- 7 Click **FINISH**.

Continue to [Client deployment methods](#).

Client deployment methods

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

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

Configuring LegalKEY 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 LegalKEY 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 LegalKEY. Select the settings that should apply to all workstations in your environment.
- 3** Go to the c:\Program Files\Common Files\Omtool directory on the workstation where AccuRoute Desktop 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 LegalKEY. When you are ready to deploy LegalKEY, launch setup.exe in the AccuRoute Desktop v2.2 directory.

Configuring LegalKEY manually

To configure LegalKEY manually:

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

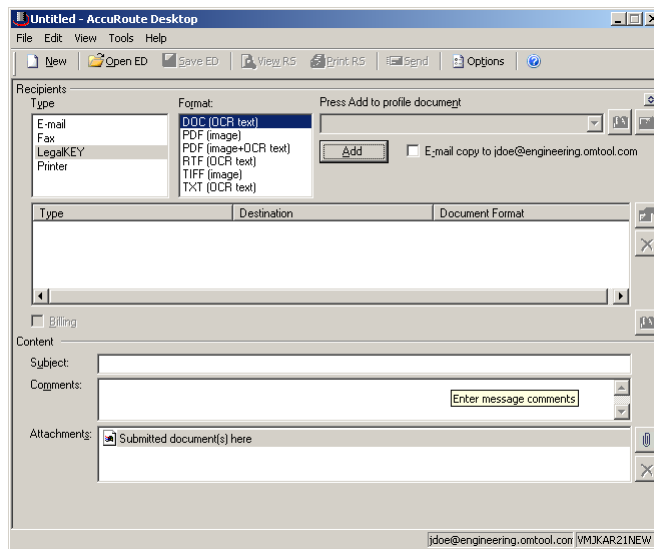
Section 7: Testing

To test the installation and configuration of Omtool DMS Libraries v2.2 for LegalKEY, 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 LegalKEY using AccuRoute Desktop:

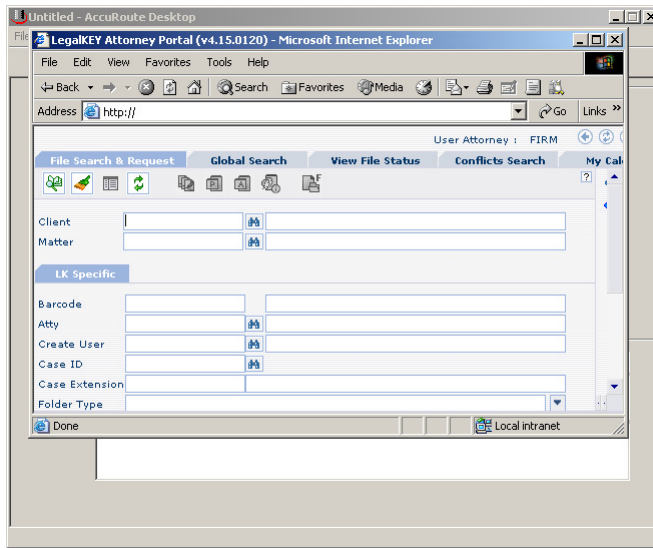
- 1 Start AccuRoute Desktop. Click **START**, go to the Omtool programs group, and select **ACCURROUTE DESKTOP**. Log in if prompted. The application appears on your desktop.



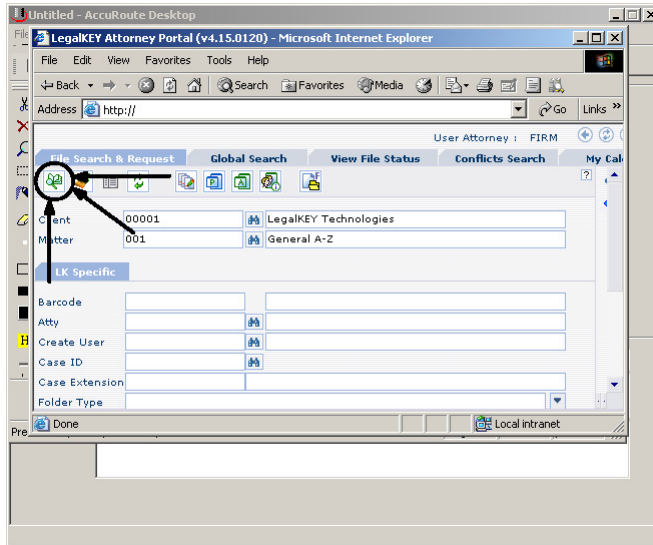
- 2 Select the destination type **LEGALKEY** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.

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

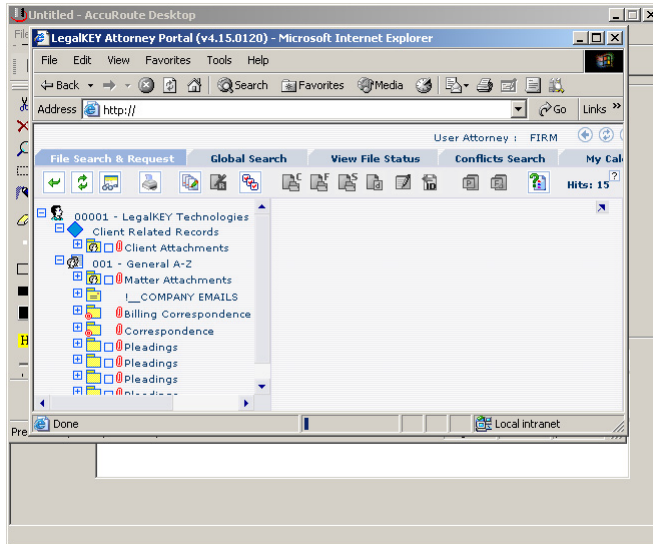
- 3 Click **ADD**. The LegalKEY Attorney Portal (v4.15.0120) window appears.



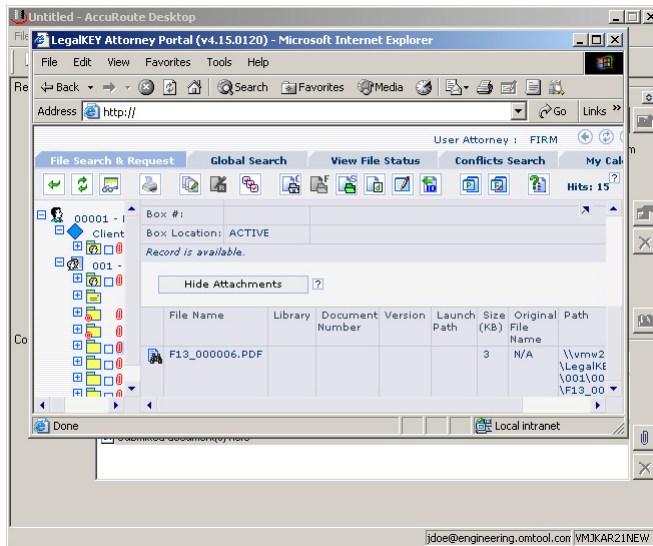
- 4 Type the appropriate client code in the **CLIENT** text box and click the binoculars button. (LegalKEY validates the client code.) Then type the appropriate matter code in the **MATTER** text box and click the binoculars button. (LegalKEY validates the matter code.)



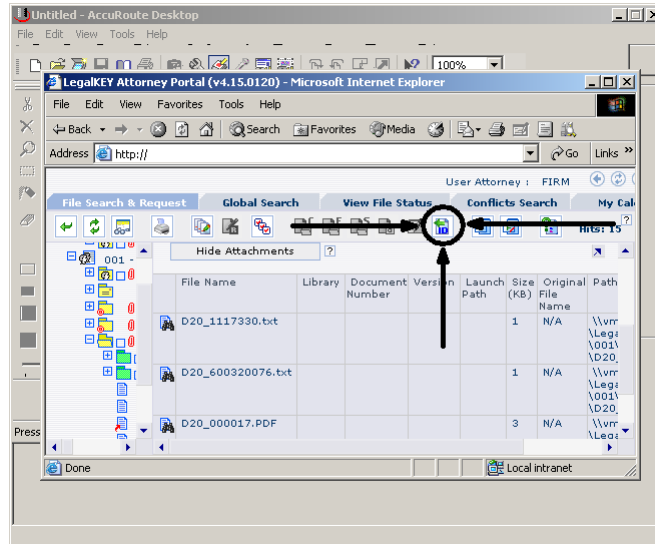
- Click **START SEARCH**. LegalKEY launches a query and returns a list of folders and files where you can save the document.



- Select a location for the document.



- 7 Click **GET ITEM ID**. LegalKEY assigns a document ID to the document and closes. (In the background, LegalKEY writes an XML file that contains all the required document routing data for AccuRoute Desktop and saves this file in the AccuRoute Desktop pickup folder.)



The document is added to the Recipient list.

- 8 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**.
- 9 Continue selecting options if necessary, and click **VIEW RS** to generate the Routing Sheet. (In the background, AccuRoute Desktop picks up the XML file from the AccuRoute Desktop pickup folder pickup folder, obtains the required document routing data, and generates the Routing Sheet.)

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 LegalKEY, 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 LegalKEY, 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 LegalKEY. Do some basic troubleshooting on LegalKEY. For example, is the Imaging Agent running? Is the Imaging Agent looking at the pickup/drop folder? Go to [Identifying LegalKEY pickup and drop folders](#) on 3-1.

If LegalKEY is functioning correctly, troubleshoot the message on the Omtool server.

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

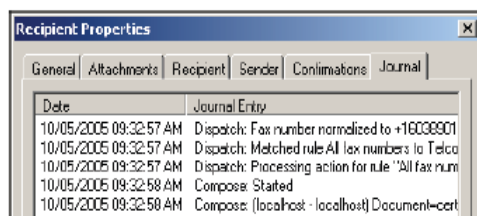


- c Sort all items by the date submitted.
 - d Look for the message.
- **Message found** - Double-click the message and then click the **JOURNAL** tab to view the message journal to determine the current state and status of the message. Then monitor the components and confirm that the message is moving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

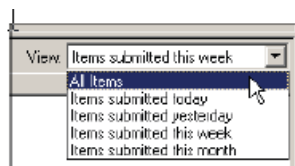
Also, check the Event Viewer for any information that might help troubleshoot the issue.



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

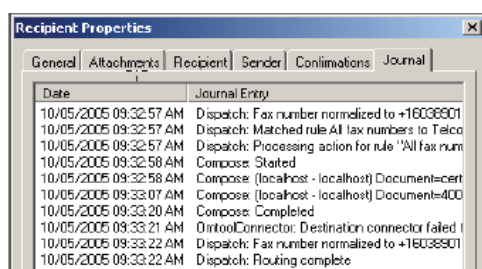
4 Look for the message in the History queue:

- 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 LegalKEY successfully.

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