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

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Section 1: Introduction

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

This section includes:

Omtool DMS Libraries integration with MyFolder (1-1)

Installation components (1-2)

Deployment summary (1-2)

Release notes (1-2)

Related documentation (1-3)

Omtool DMS Libraries integration with MyFolder

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

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

For more information on profiling documents to MyFolder, go to Section 8: Testing.

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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 MyFolder:

1. Complete the installation requirements. (Go to Section 3: Installation.)
2. Configure sharing and security permissions. (Go to Section 4: Sharing and security permissions.)
3. Complete required server configuration. (Go to Section 5: Required server configuration.)
4. Complete any optional server configuration. (Go to Section 6: Optional server configuration.)
5. Complete the client configuration. (Go to Section 7: Client configuration.)
6. Test profiling a document into MyFolder. (Go to Section 8: Testing.)
7. Troubleshoot the installation. (Go to Section 9: Troubleshooting.)

Release notes

Enhancements

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

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

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Resolutions

Omtool DMS Libraries v2.2 for MyFolder 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.)

Limitations

Omtool DMS Libraries v2.2 for MyFolder includes the following limitations:

- **The Profile dialog box "trails" when moved**: When you select MyFolder as a recipient type, the Profile dialog box opens. If you reposition the Profile dialog box to another location on the window, a copy of the Profile dialog box is left behind. This happens every time you try to reposition the Profile dialog box. Closing the front instance of the Profile dialog box closes all copies. See Knowledge Base Article K04136. (Go to Online resources on the inside front cover.)
- **MyFolder can not use the Home folder as a destination**: When a home folder is configured for each user in Active Directory in Users and Computers, and MyFolder is configured with the "Home Folder" and "Connect using current user options", when a user tries to add a MyFolder destination in AccuRoute Desktop, the following error appears: "Failed to profile document". See Knowledge Base Article K04126. (Go to Online resources on the inside front cover.)

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 MyFolder using AccuRoute Desktop - http://www.omtool.com/documentation/dmslibraries/v22/MyFolder/OmtoolDMSLibrariesV22MyFolderQuickStartGuide.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)

Server requirements

The system where you install the DMS connector for MyFolder 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 1 DMS connector license

Client requirements

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

- ❒ AccuRoute Desktop v2.2 or higher

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Section 3: Installation

This section includes:

Pre-configuring MyFolder (3-1)

Adding the MyFolder connector (3-4)

Completing the MyFolder connector Configuration Wizard (3-6)

Pre-configuring MyFolder

There are two options available when you configure MyFolder. You can select either the user's Home folder or you can specify a directory structure. If you select the user's Home folder no pre-configuration is required for MyFolder. (Go to Adding the MyFolder connector on 3-4.) The user's home folder is configured in Active Directory. For more information, consult your Active Directory documentation.

If you are specifying a directory structure, however, before you can complete the configuration wizard for MyFolder, you must create the MyFolder directory structure in the local area network.

Continue to Creating a directory structure to support MyFolder.

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Creating a directory structure to support MyFolder

To create the MyFolder directory structure:

1. Create the top level folder and name it **MyFolder**. (If desired, you can choose a different name for this folder.)
2. If you are in a domain, identify the domains where Windows users route documents to MyFolder, and create a level 2 subfolder for each domain. The folder name must be the same as the domain name. For example, when the domain name is **WindowsDomain**, the folder must be called **WindowsDomain**.

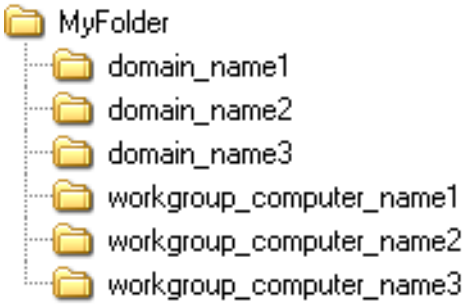
   –Or–

   If you are in a workgroup, identify the workgroups where Windows users route documents to MyFolder, and create a level 2 subfolder for each workgroup computer. The folder name must be the same as the workgroup computer name. For example, when the computer name is **WorkgroupComputer**, the folder must be called **WorkgroupComputer**.

Tip You do not need to create individual folders for each Windows user. When a Windows user routes a document the first time, the level 3 folder is created automatically.

When you finish creating the directory structure, it might look similar to the following example:

Figure 3-A: **Directory structure**



The above illustration demonstrates a valid directory structure for MyFolder.

Continue to Setting sharing permissions and security permissions. Read about MyFolder security, and then configure permissions on MyFolder.

Setting sharing permissions and security permissions

After you create the directory structure for MyFolder, configure the sharing and security permissions.

The minimum required sharing and security permissions allow users to do the following:

- All MyFolder users must be able to access all levels of the MyFolder structure.
- All MyFolder users must be able to create folders on the level below the domain or workgroup folder.

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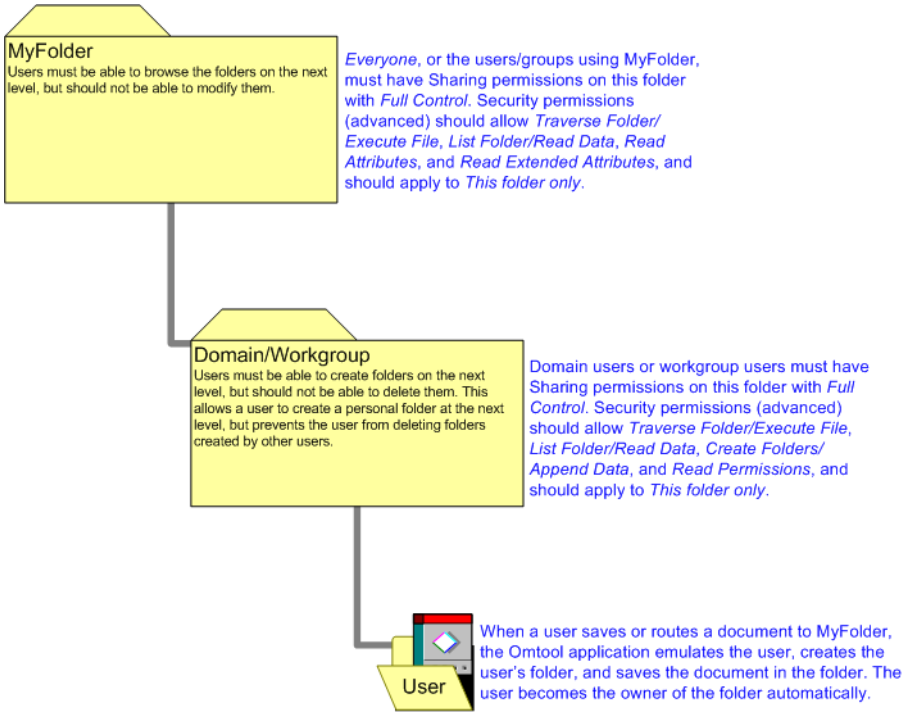
- All MyFolder users become the owner of their respective personal folders, but cannot access or modify the contents of other users' folders.
- The Windows account associated with the AccuRoute server must have access all levels of the MyFolder structure and security permissions with full control.
- If you are connecting via HTTP or HTTPS to an AccuRoute server in a different domain and the MyFolder directory is configured on the local system, you must specify the location of the MyFolder directory using the IP address. The Omtool server may have problems resolving the server name to an actual IP address due to DNS issues. Using the IP address eliminates the DNS issues.
- Set permissions for the c:\Program Files\Common Files\Omtool directory. The Domain Users group (or other appropriate user group) requires read/write permissions to this directory.

Figure 3-B: **Minimum requirements for MyFolder**



The above diagram illustrates the minimum requirements for MyFolder users.

For detailed instructions on configuring sharing and security permissions for MyFolder, go to Section 4: Sharing and security permissions (4-1). For more information on sharing and security permissions, consult Windows help.

Continue to Adding the MyFolder connector.

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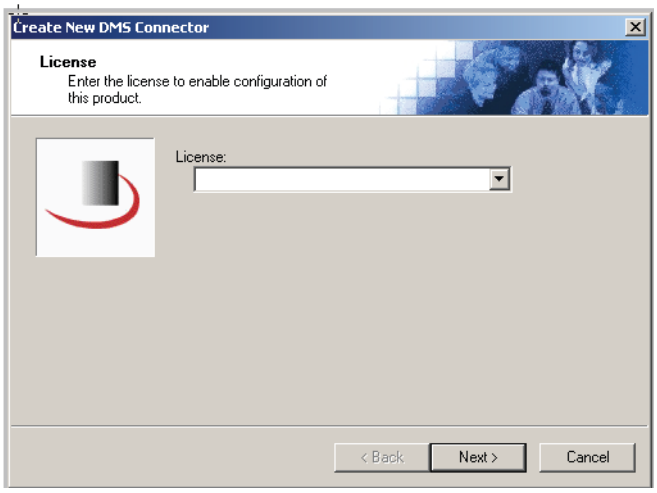
Adding the MyFolder connector

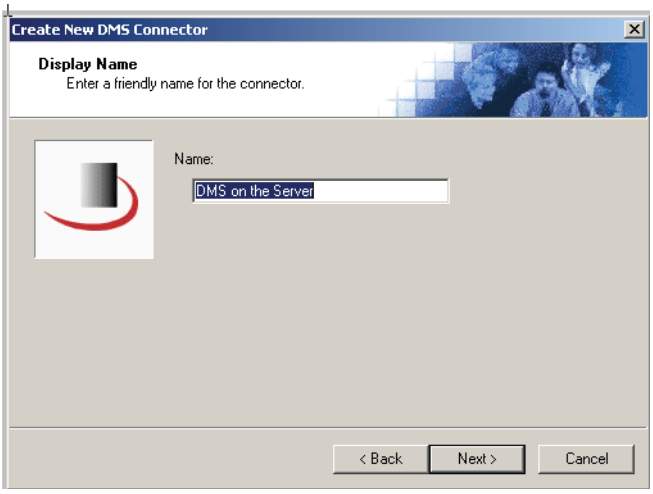
Note The Export Profile Information and Create Default Profile Information buttons are not applicable for the MyFolder DMS connector at this time.

To add the MyFolder 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 MyFolder connector in the **LICENSE** text box and click **NEXT**. The Display Name window appears.



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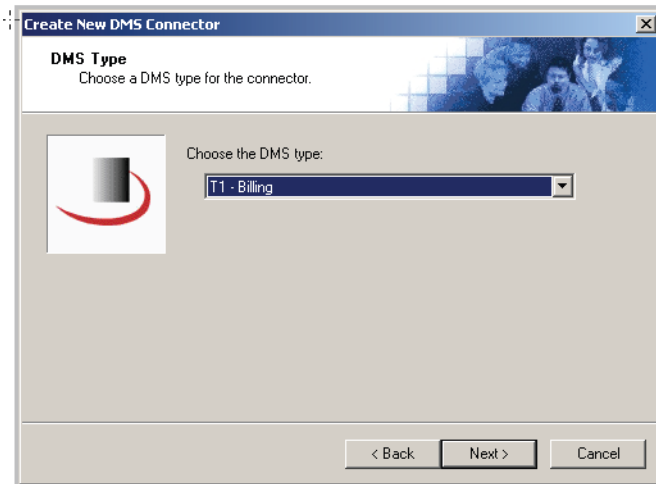
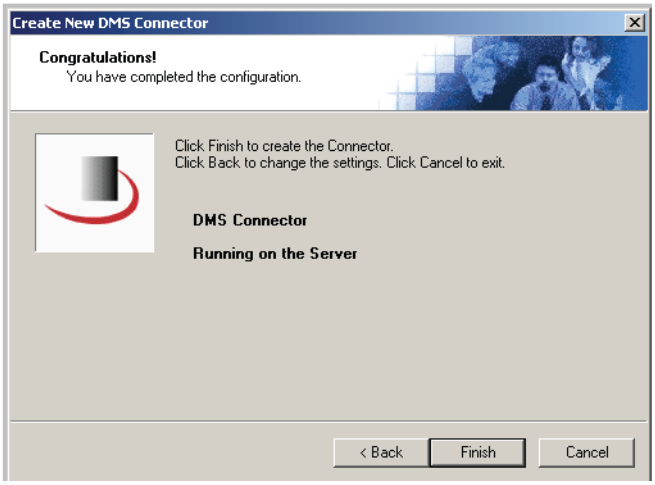
3 Type a friendly name for this connector in the **NAME** text box and click **NEXT**. The DMS Type window appears.



4 Select **T1 - MYFOLDER** 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 MyFolder.

Continue to Completing the MyFolder connector Configuration Wizard.

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Completing the MyFolder connector Configuration Wizard

All Omtool applications on the same system share the Omtool DMS Libraries configuration (3-6)
Configuring a new MyFolder connector (3-6)
Configuring an existing MyFolder connector (3-7)

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

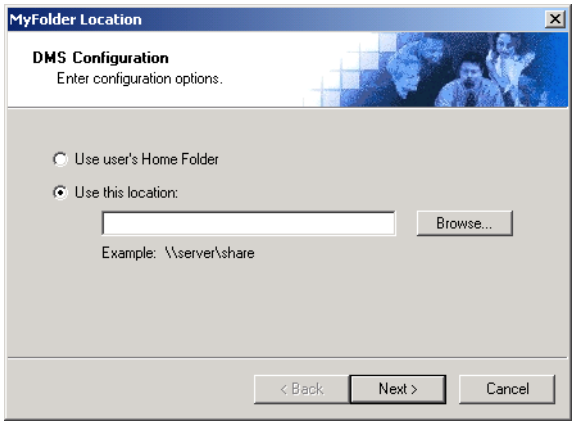
When multiple Omtool applications are installed on the same system, these applications share the same DMS configuration data. If you make changes to the DMS configuration settings for one Omtool application, those changes affect all Omtool applications installed on the system.

Configuring a new MyFolder connector

The MyFolder Location window appears immediately after you complete the new connector wizard.

Figure 3-C: **MyFolder Location window**

Select the location to store your MyFolder documents on this window.



To complete the configuration wizard for a new MyFolder connector:

1. Indicate the location of the MyFolder directory. Select **USE USER'S HOME FOLDER** to select the user's home folder as defined in their Windows NT profile; or, select **USE THIS LOCATION**, click **BROWSE**, go to the MyFolder directory, select it, and click **OK**. For more information on the user's Home folder, see your Active Directory documentation.

   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.

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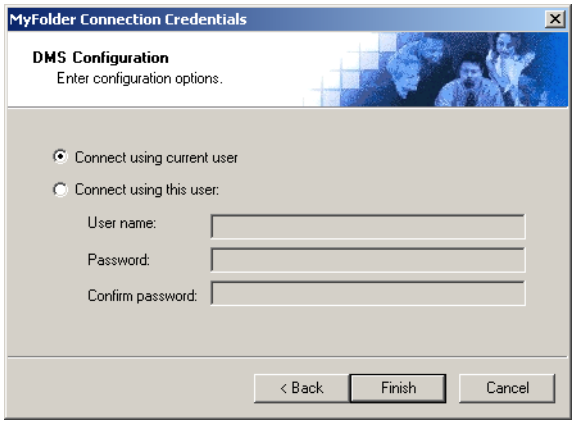
2 Click **NEXT**. The MyFolder Connection Credentials window appears.



3 Select an authentication method:

CONNECT USING CURRENT USER - Select this option to connect to the MyFolder directory using the login credentials of the current Windows user. (This setting is recommended for single-user workstations.)

CONNECT USING THIS USER - Select this option to connect to the MyFolder directory using specific login credentials, and type the user name and password in the **USER NAME**, **PASSWORD**, and **CONFIRM PASSWORD** text boxes.

If you are configuring the DMS connector on the AccuRoute server, Omtool strongly recommends that you select **CONNECT USING THIS USER** and provide the login credentials of the Windows user account associated with the AccuRoute server. In rare circumstances when the AccuRoute server cannot obtain the Windows login credentials of the AccuRoute Desktop user, the server uses these login credentials. This reduces the possibility of an authentication failure.

4 Click **FINISH**.

Configuring an existing MyFolder connector

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

To complete the configuration wizard for an existing MyFolder connector:

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

2 Click the **ADVANCED** tab.

3 Locate the **DMS CONFIGURATION** section, and click **CONFIGURE**. The MyFolder Location window appears.

4 Perform steps one through four in Configuring a new MyFolder connector (3-6)

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Section 4: Sharing and security permissions

This section includes:

Introduction (4-1)
Requirements (4-1)
Security considerations (4-2)
Setting permissions for MyFolder users (4-2)
Setting the required permissions for the Omtool server Windows account (4-17)

Introduction

This section contains detailed instructions on setting sharing and security permissions for MyFolder.

In order to complete the procedures in this section, you should be familiar with Windows sharing and security permissions. For additional information on Windows permissions, consult Windows help.

The procedures described in this section apply to Windows 2003/2000 servers.

Continue to Requirements.

Requirements

Before you proceed, verify that you have created the required folders for MyFolder. As a minimum, you must have a top-level folder, called MyFolder or some other name, and a second-level folder for each domain or workgroup to which MyFolder users belong.

Continue to Security considerations.

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Security considerations

This section outlines the minimum required permissions for MyFolder users. By implementing these permissions, you enable MyFolder users to access and modify the contents of their personal folders only. Users cannot modify the contents of another user's folder. If desired, you can allow additional permissions as necessary.

Continue to Setting permissions for MyFolder users.

Setting permissions for MyFolder users

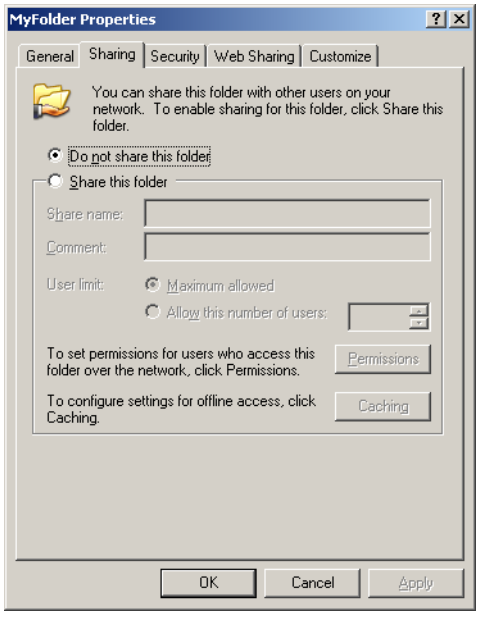
Top-level folder (MyFolder)

Using the following procedure, set the sharing and security permissions for MyFolder users on the top-level folder in the structure. This folder might be called MyFolder or some other name.

This procedure instructs you to give Everyone sharing permissions with Full Control and special read security permissions that apply to this folder only. Omtool recommends that you use Everyone as documented in the following procedure. However, as an alternative to Everyone, you can add only the users or groups that use MyFolder.

To set the sharing and security permissions on the top-level folder:

1. Go to the top-level folder using Windows Explorer. Right-click the folder and select **PROPERTIES**.
2. Click the **SHARING** tab.



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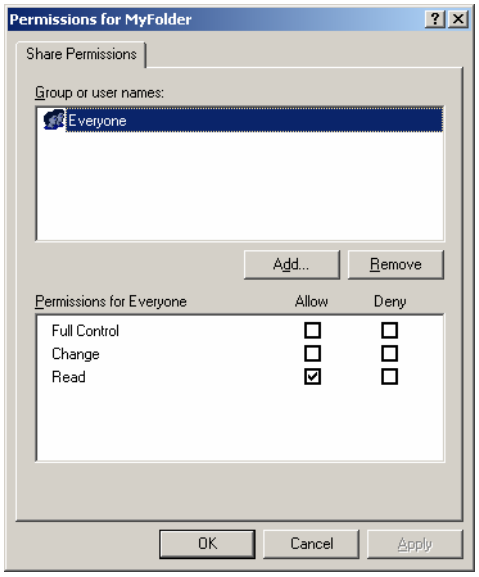
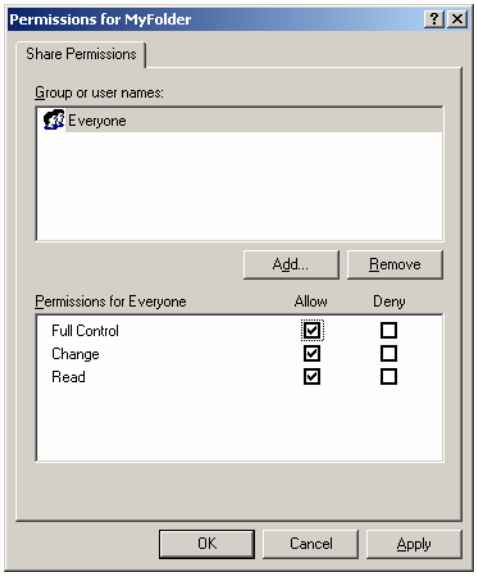
3 Select **SHARE THIS FOLDER** and click **PERMISSIONS**.



4 Select **EVERYONE** in the **GROUP OR USER NAMES** section, go to the **PERMISSIONS FOR EVERYONE** section, and select the **ALLOW** check box associated with the **FULL CONTROL** option.



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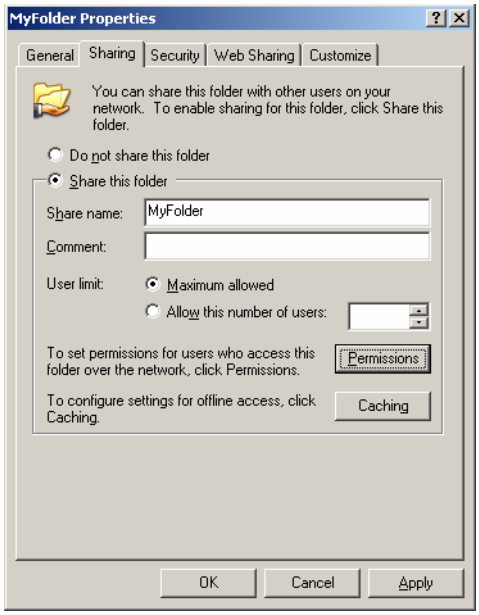
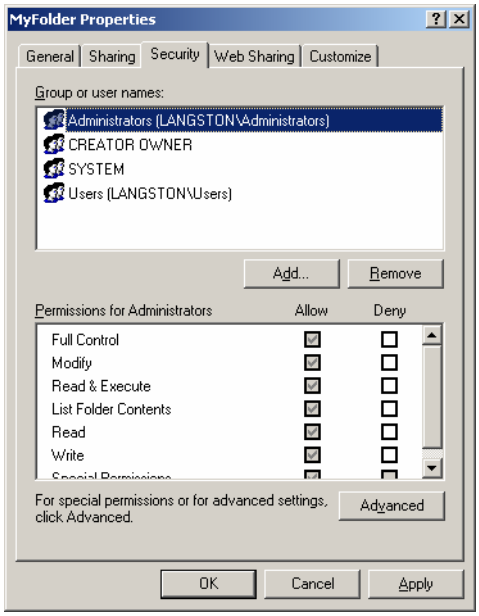
5 Click **APPLY** and click **OK**.



6 Click the **SECURITY** tab.



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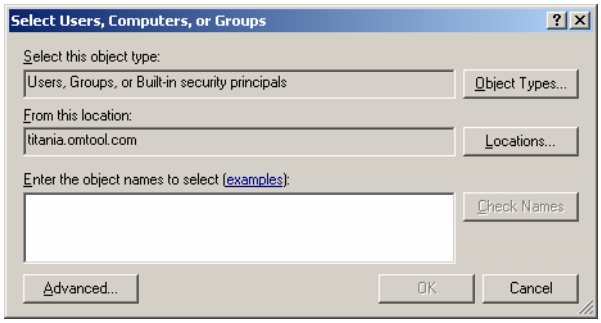
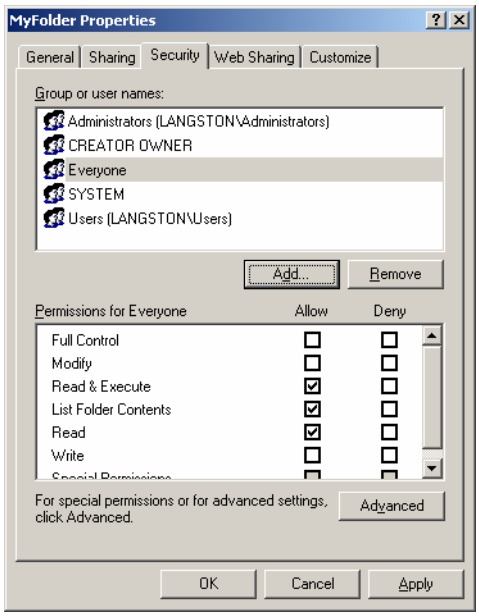
7 Click **ADD**.



8 Go to the **ENTER THE OBJECT NAMES TO SELECT** section, enter `Everyone`, click **CHECK NAMES**, verify that **EVERYONE** resolved, and click **OK**.



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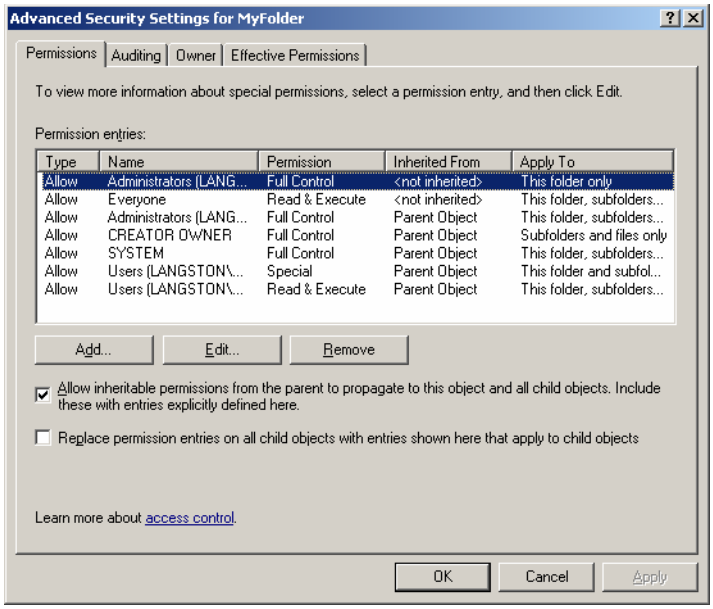
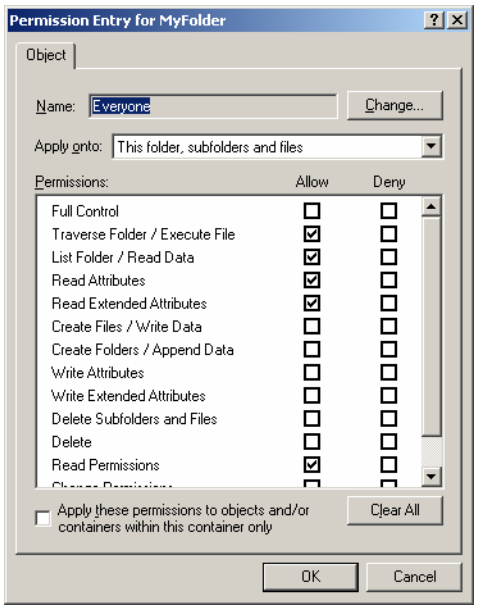
9 Select **EVERYONE** in the **GROUP OR USER NAMES** section, go to the **PERMISSIONS FOR EVERYONE** section, and click **ADVANCED**.



10 Select **EVERYONE** in the **PERMISSIONS ENTRIES** list and click **EDIT**.



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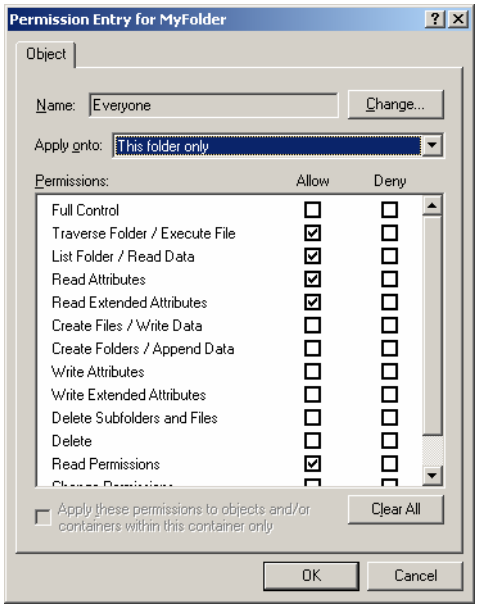
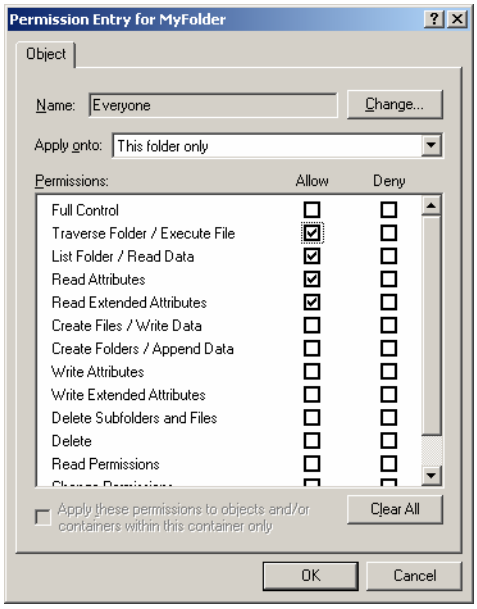
11 Go to the **APPLY ONTO** drop-down menu and select **THIS FOLDER ONLY**.



12 Go to the **PERMISSIONS** section and select the **ALLOW** check box associated with the **TRAVERSE FOLDER/EXECUTE FILE**, **LIST FOLDER/READ DATA**, **READ ATTRIBUTES**, and **READ EXTENDED ATTRIBUTES** options. (The permissions listed in this step are required. You can allow or deny other permissions as desired.)



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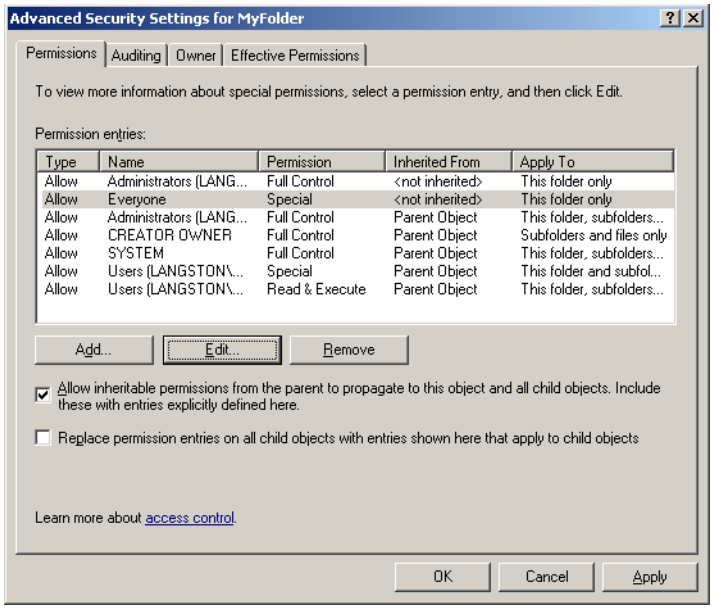
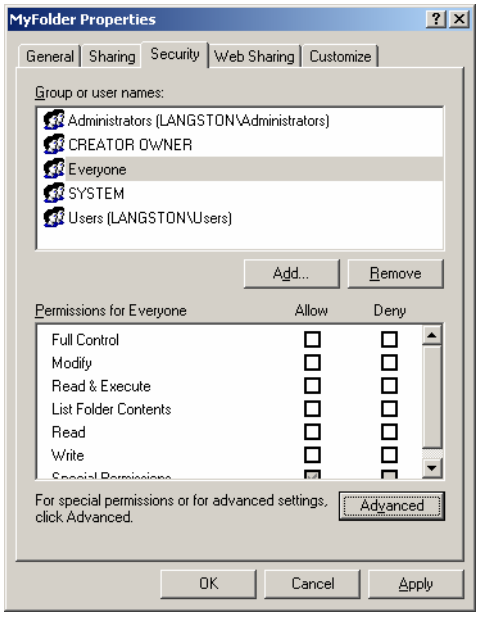
13 Click **OK** to close the Permission Entry for MyFolder dialog box.



14 Click **APPLY** and click **OK** to close the Advanced Security Settings for MyFolder dialog box.



15 Click **APPLY** and click **OK** to close the MyFolder Properties dialog box.

Continue to Second-level folder (domain or workgroup name).

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Second-level folder (domain or workgroup name)

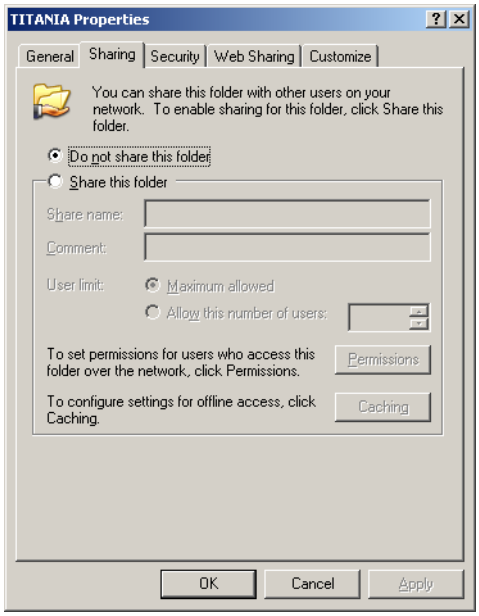
Using the following procedure, set the sharing and security permissions for MyFolder users on the second-level folder in the structure. This folder should be named after the domain or workgroup to which MyFolder users belong.

This procedure instructs you to give domain users or workgroup users sharing permissions with Full Control and special read/write security permissions that apply to this folder only. Omtool recommends that you include all domain users or workgroup users as documented in the following procedure. As an alternative to this method, however, you can add only the users or groups that use MyFolder.

Note Note: The image captures in the following procedure illustrate the sharing and security permissions for users in the domain TITANIA.

To set the sharing and security permissions on the second-level folder:

1. Go to second-level folder using Windows Explorer. Right-click the folder and select **PROPERTIES**.
2. Click the **SHARING** tab.



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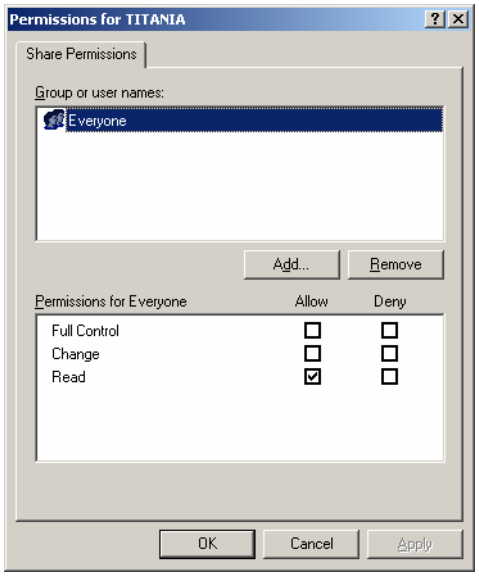
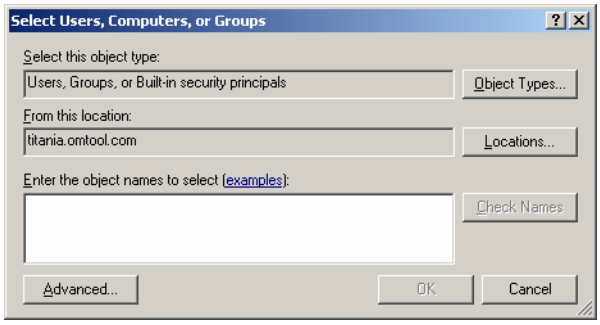
3 Select the **SHARE THIS FOLDER** option and click **PERMISSIONS**.



4 Click **ADD**.



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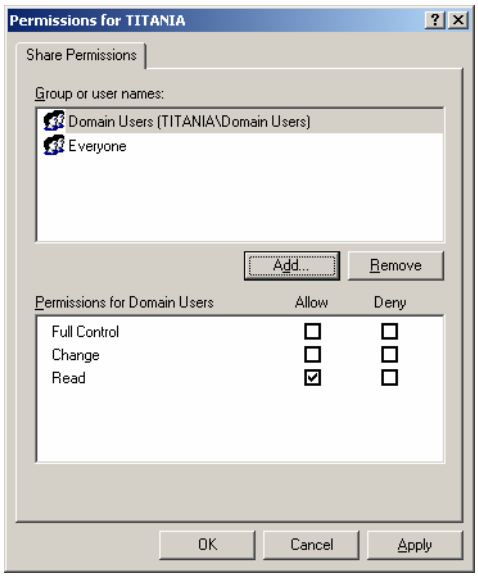
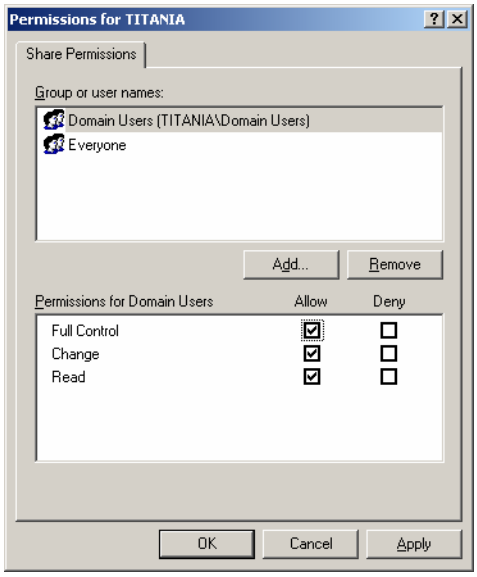
5 Go to the **ENTER THE OBJECT NAMES TO SELECT** section, enter `domain users` (for a domain) or `workgroup users` (for a workgroup), click **CHECK NAMES**, verify that the account name is resolved, and click **OK**.



6 Select the domain users group or workgroup users group in the **GROUP OR USER NAMES** section, go to the **PERMISSIONS FOR <GROUP>** section, and select the **ALLOW** check box associated with the **FULL CONTROL** option.



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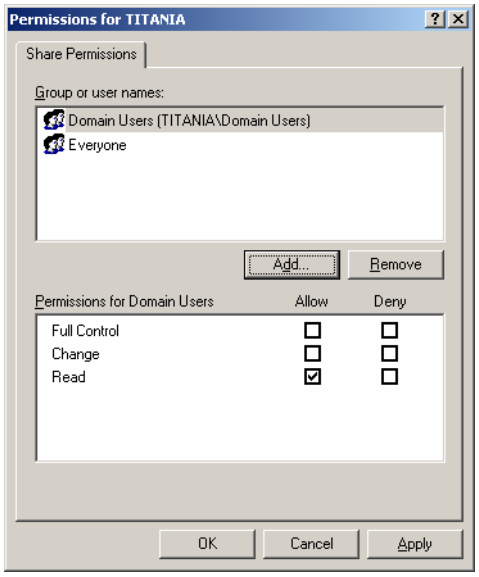
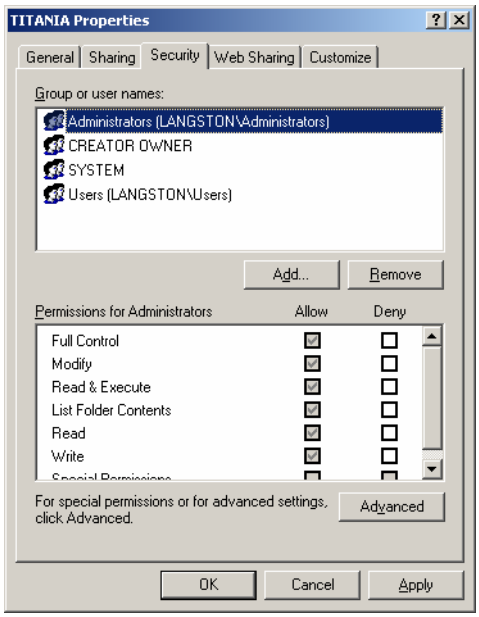
7 Click **APPLY** and click **OK**.



8 Click the **SECURITY** tab.



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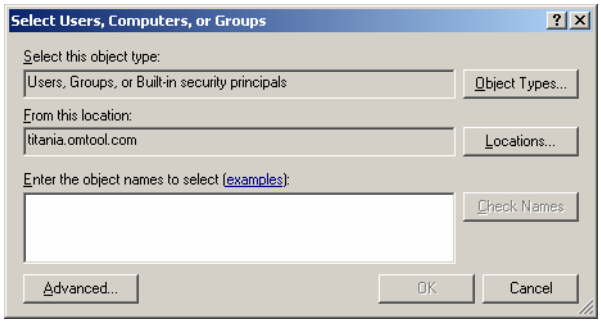
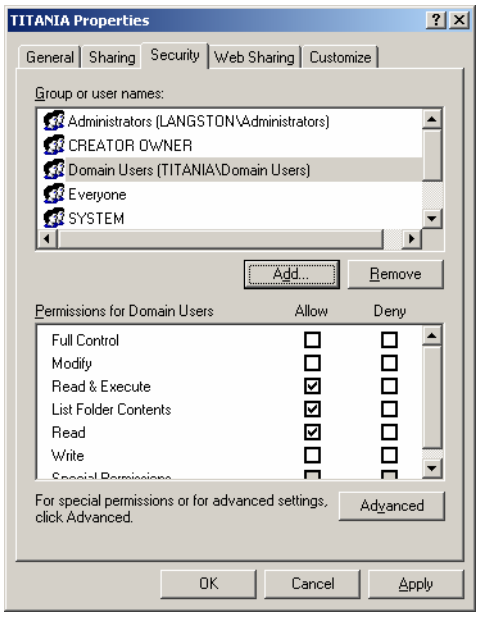
9 Click **ADD**.



10 Go to the **ENTER THE OBJECT NAMES TO SELECT** section, enter `domain users` (for a domain) or `workgroup users` (for a workgroup), click **CHECK NAMES**, verify that the account name is resolved, and click **OK**.



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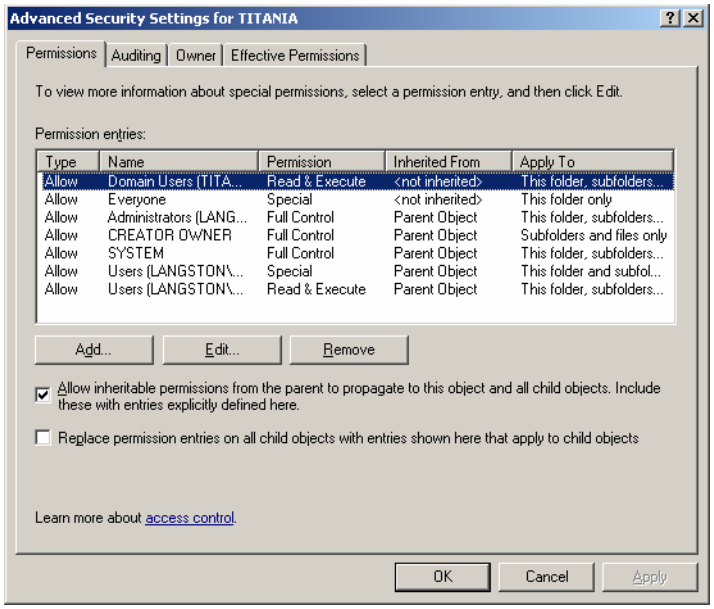
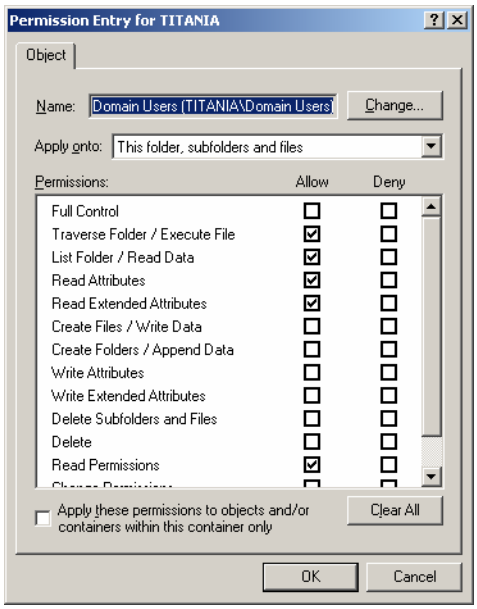
11 Select the domain users group or workgroup users group in the **GROUP OR USER NAMES** section, go to the **PERMISSIONS FOR <GROUP>** section, and click **ADVANCED**.



12 Select the domain users group or workgroup users group in the **PERMISSIONS ENTRIES** list and click **EDIT**.



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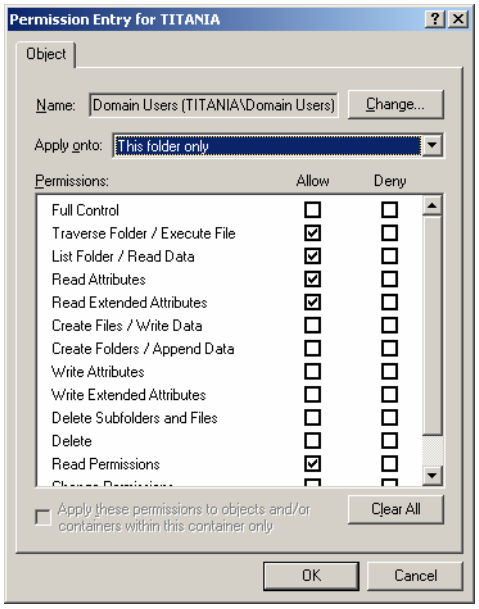
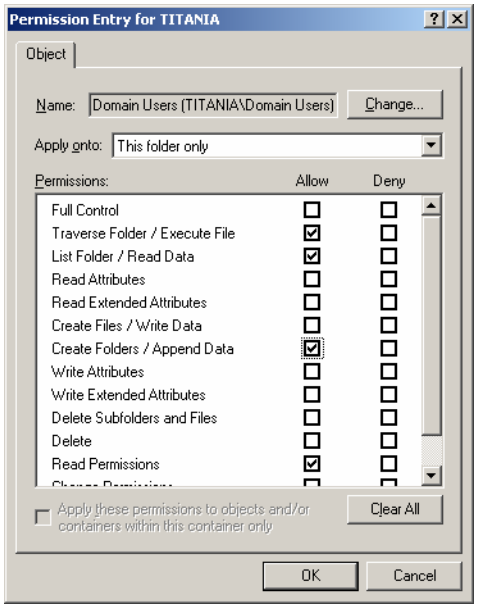
13 Go to the **APPLY ONTO** drop-down menu and select **THIS FOLDER ONLY**.



14 Go to the **PERMISSIONS** section and select the **ALLOW** check box associated with the **TRAVERSE FOLDER/EXECUTE FILE**, **LIST FOLDER/READ DATA**, **CREATE FOLDERS/APPEND DATA**, and **READ PERMISSIONS** options. (The permissions listed in this step are required. You can allow or deny other permissions as desired.)



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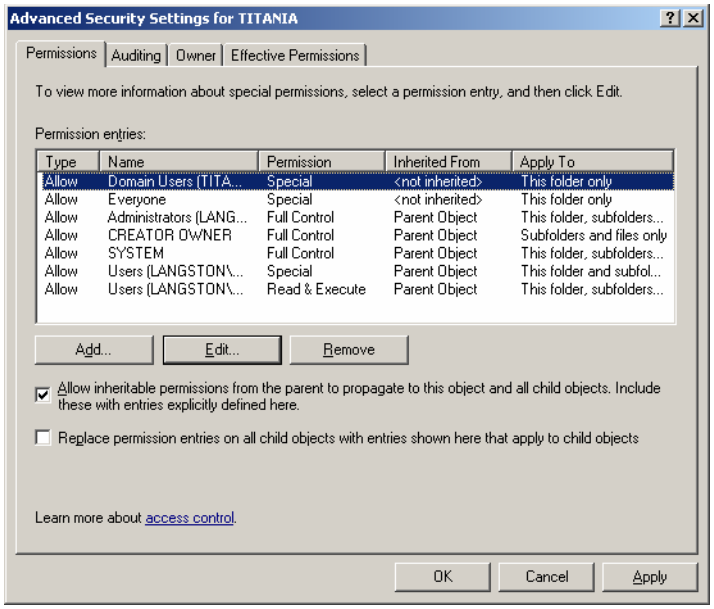
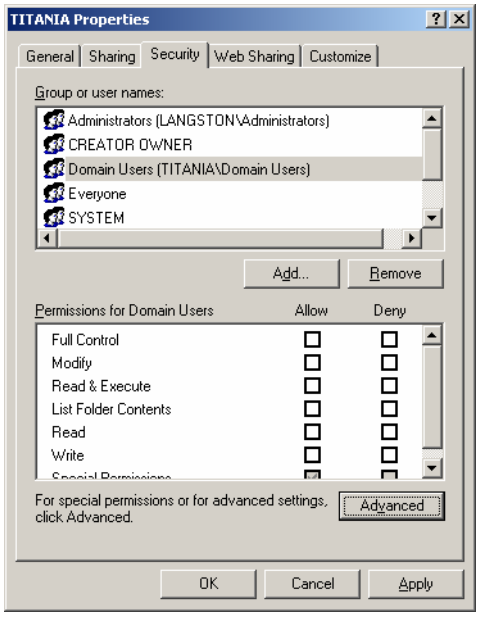
15 Click **OK** to close the Permission Entry for the dialog box.



16 Click **APPLY** and click **OK** to close the Advanced Security Settings for the dialog box.



17 Click **APPLY** and click **OK** to close the Properties dialog box.

Repeat this procedure for each second-level folder that represents a domain or workgroup.

Continue to Setting the required permissions for the Omtool server Windows account.

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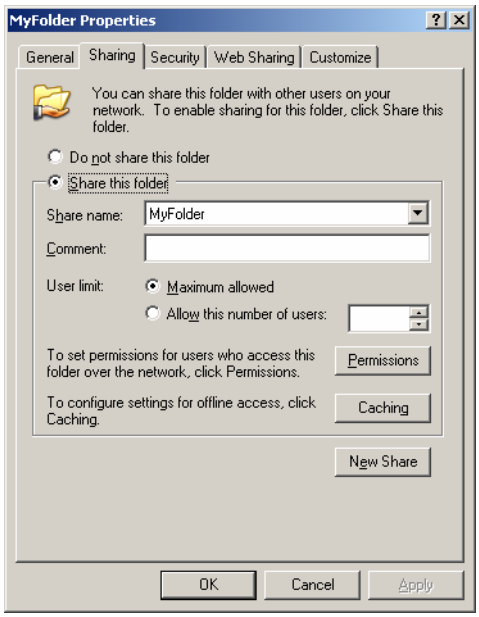
Setting the required permissions for the Omtool server Windows account

Using the following procedure, set the sharing and security permissions for the Omtool server Windows account. These permissions are set on the top-level folder, and apply to all subfolders in the structure.

To set the sharing and security permissions on the top-level folder:

1 Go to the top-level folder using Windows Explorer. Right-click the folder and select **PROPERTIES**.

2 Click the **SHARING** tab.



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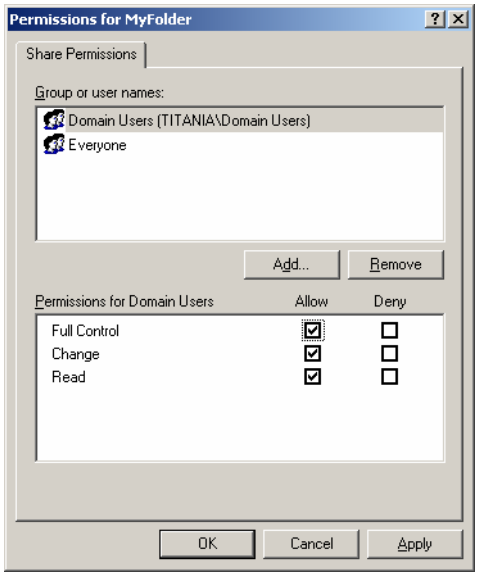
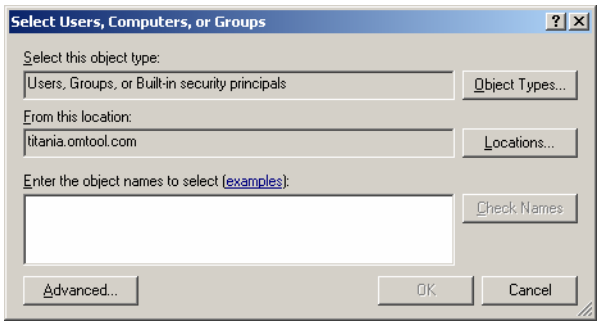
3 Click **PERMISSIONS**.



4 Click **ADD**.



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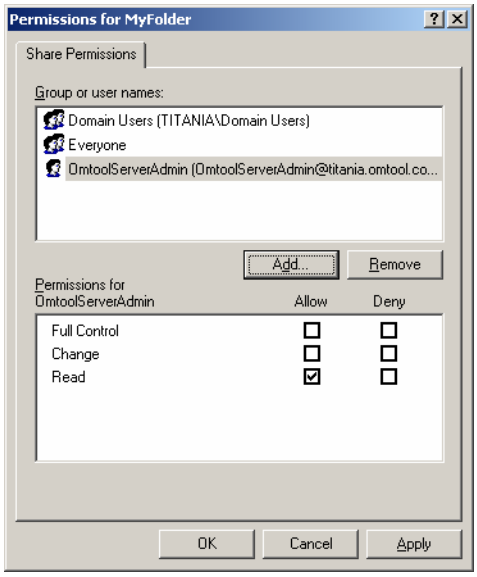
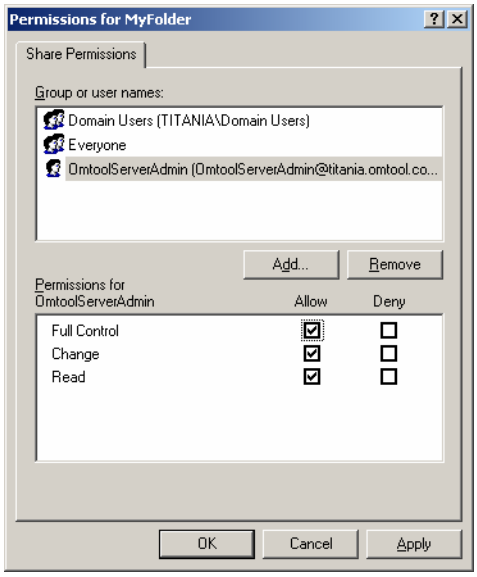
5 Go to the **ENTER THE OBJECT NAMES TO SELECT** section, enter the name of the Omtool server Windows account, click **CHECK NAMES**, verify that the account name is resolved, and click **OK**.



6 Select the Omtool server account in the **GROUP OR USER NAMES** section, go to the **PERMISSIONS FOR <OMTOOL SERVER ACCOUNT>** section, and select the **ALLOW** check box associated with the **FULL CONTROL** option.



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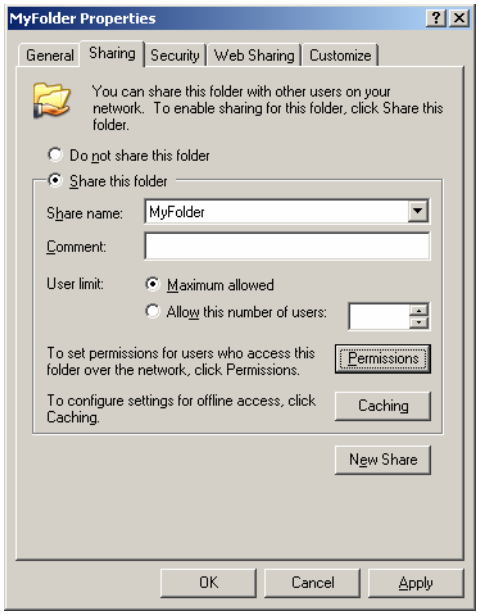
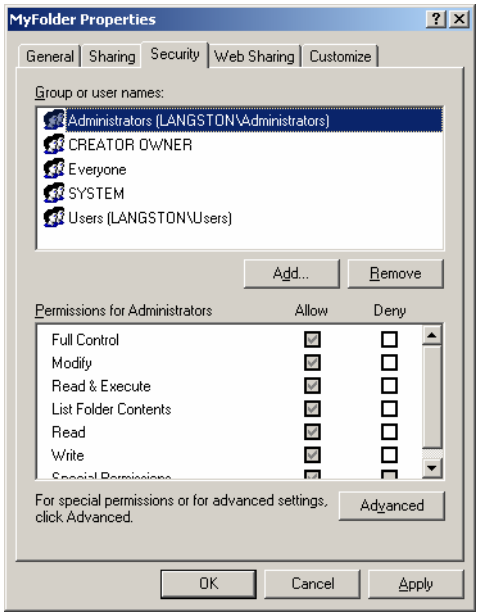
7 Click **APPLY** and click **OK**.



8 Click the **SECURITY** tab.



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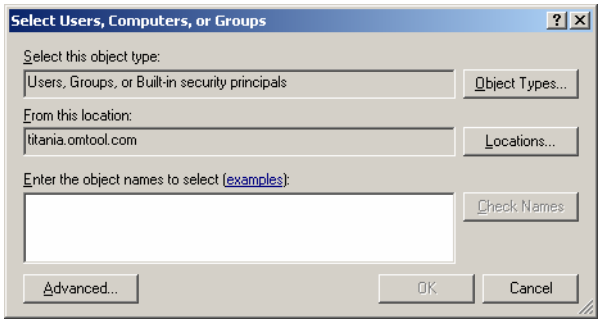
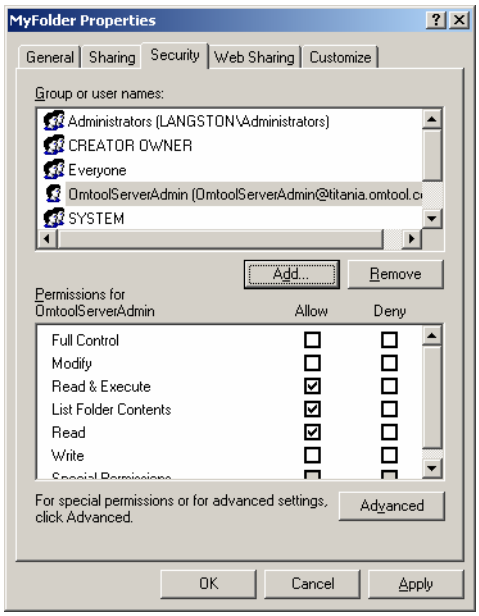
9 Click **ADD**.



10 Go to the **ENTER THE OBJECT NAMES TO SELECT** section, type the name of the Omtool server Windows account, click **CHECK NAMES**, verify that the account name is resolved, and click **OK**.



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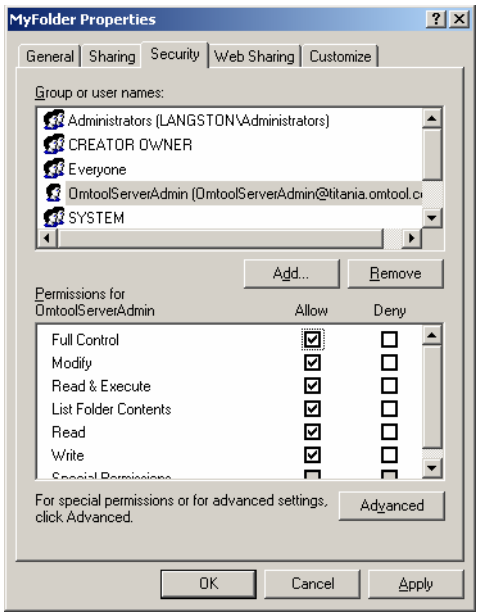
11 Select the Omtool server account in the **GROUP OR USER NAMES** section, go to the **PERMISSIONS FOR EVERYONE** section, and select the **ALLOW** check box associated with the **FULL CONTROL** option.



12 Click **APPLY** and click **OK** to close the MyFolder Properties dialog box.

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Section 5: Required server configuration

This section includes:

Enabling MyFolder as a recipient type in AccuRoute Desktop (5-1)

Enabling MyFolder as a recipient type in AccuRoute Desktop

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

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

Now when you start AccuRoute Desktop, MyFolder 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.

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Section 6: Optional server configuration

This section includes:

Changing the label of a document (6-1)

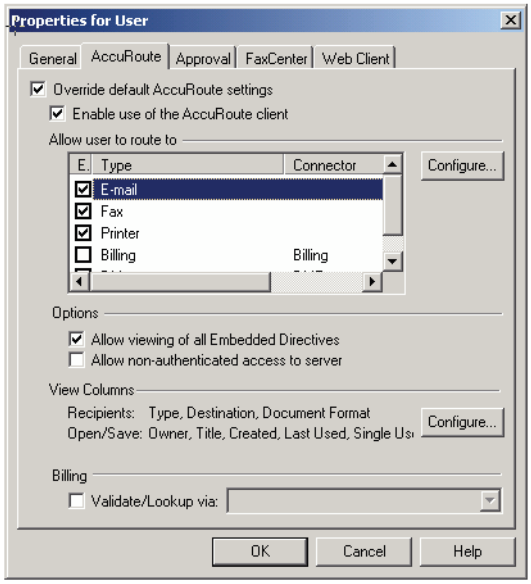
Changing the label of a document

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 **ACCUROUTE** tab.
3. Highlight an item in the ALLOW USER TO ROUTE TO list.



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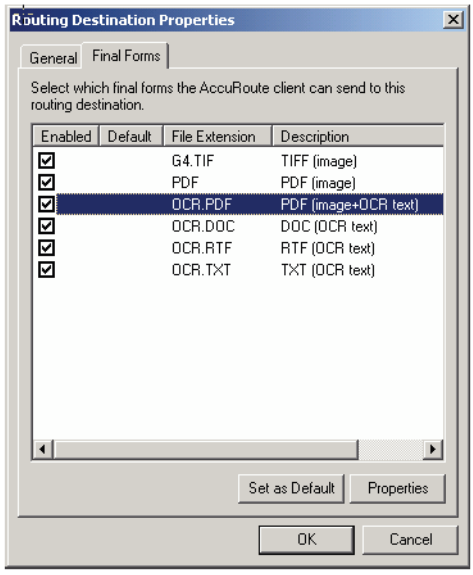
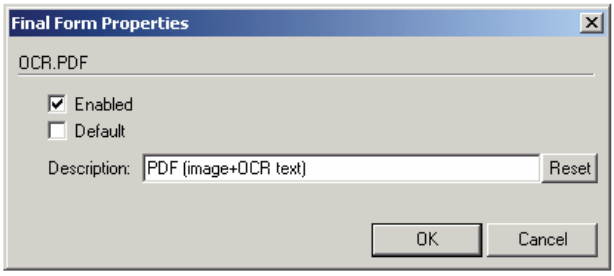
4 Click CONFIGURE and click the FINAL FORMS tab.

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** to close all the open dialogs.

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

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Section 7: Client configuration

This section includes:

Configuring AccuRoute Desktop (7-1)
Client deployment methods (7-1)

Configuring AccuRoute Desktop

To add MyFolder functionality to AccuRoute Desktop:

1. Start AccuRoute Desktop and log in.
2. Click **TOOLS** on the menu bar and select **CONFIGURE DMS**.
3. Select **MYFOLDER** from the menu that appears.The MyFolder Location window appears.

At this point, the configuration is identical to that of the connector configuration. Perform steps one through four in Configuring a new MyFolder connector (3-6).

Continue to Client deployment methods.

Client deployment methods

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

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

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

Configuring MyFolder manually

To configure MyFolder manually:

AccuRoute Desktop - (Go to Configuring AccuRoute Desktop on 7-1.) Follow these steps on all AccuRoute Desktop workstations.

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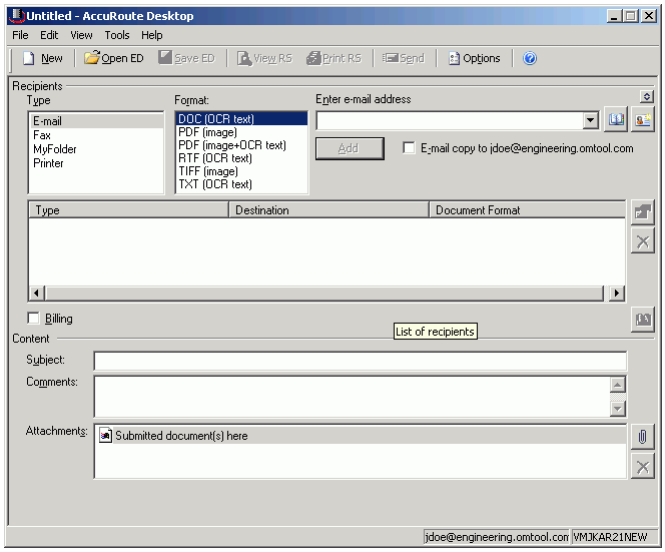
Section 8: Testing

To test the installation and configuration of Omtool DMS Libraries v2.2 for MyFolder, 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 MyFolder 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 **MYFOLDER** 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.

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

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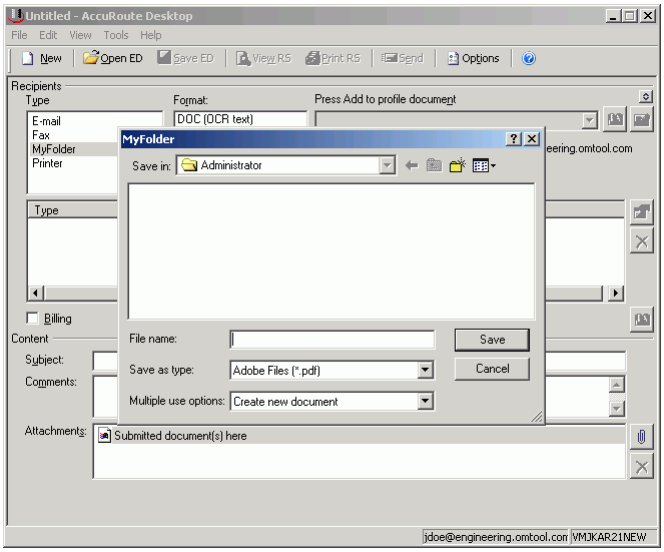
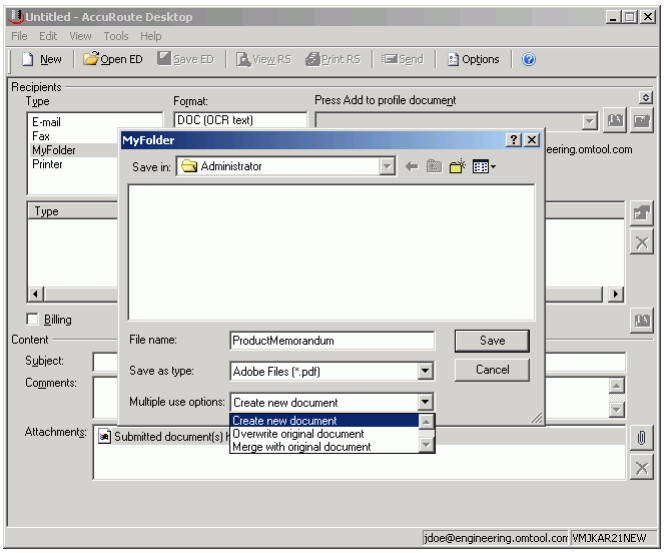
3 Click **ADD**. The MyFolder window appears.



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

Note that the **SAVE AS TYPE** defaults to match the document format you selected in Step 2. Do not make any changes to this option.

5 From the **MULTIPLE USE OPTIONS** drop-down list, select one of the following:



CREATE NEW DOCUMENT. Selecting this option creates a new document in MyFolder. If you select this option and the file name already exists, the following message appears. Click **YES** to replace the file or click **NO** to return to the MyFolder window.

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OVERWRITE ORIGINAL DOCUMENT. If a document already exists with the file name you selected in Step 4, selecting this option overwrites the original file. Click **YES** when the following message appears to replace the file or click **NO** to return to the MyFolder window.

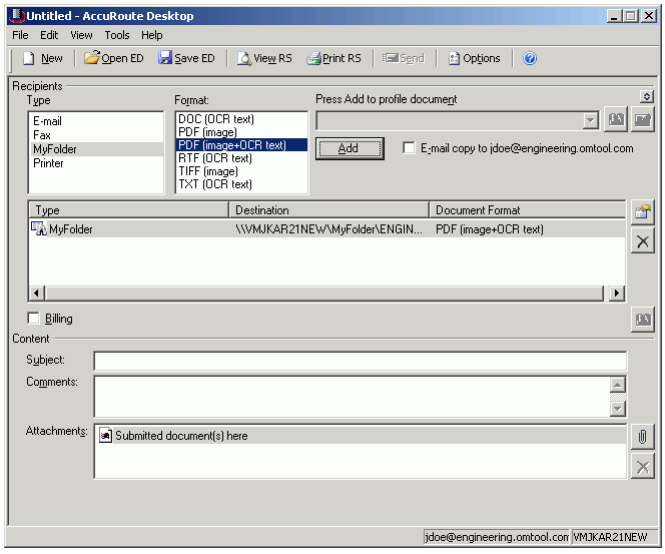
MERGE WITH ORIGINAL DOCUMENT. If a document already exists with the file name you selected in step 4, selecting this option merges any file attachments with the original document. The resulting file is stored with the original file name.

Click **YES** when the following message appears to merge the documents or click **NO** to return to the MyFolder window.

After the message is sent, any attachments on this message will be merged with the original document, resulting in one document stored in MyFolder.

Note that this option is only available when you select **PDF (IMAGE)** or **PDF (IMAGE+OCR TEXT)** as your document format.

6 Click **SAVE**. A MyFolder destination appears in the message.



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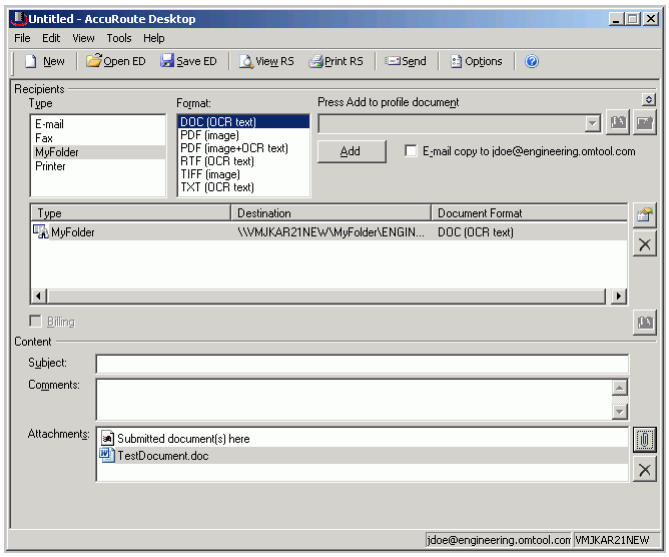
7 Add content to your message.

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

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

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

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



8 Do any of the following:

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

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

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

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Section 9: Troubleshooting

This section includes:

Detecting workflow issues (9-1)

Troubleshooting the message on the Omtool server (9-1)

Troubleshooting the multifunction device (9-3)

Troubleshooting the client (9-3)

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 MyFolder, 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 MyFolder, and then continues to the Omtool server, the device (if applicable), and then the client.

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.

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To locate the message on the Omtool server:

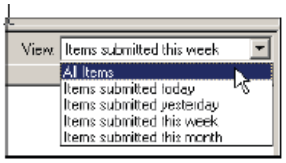
1 Start the Administrator.

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**.



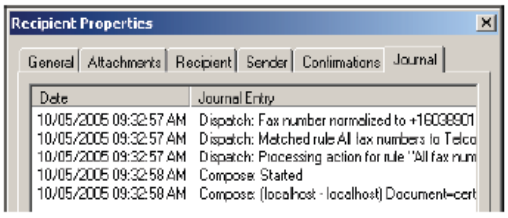
c Sort all items by the date submitted.

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.

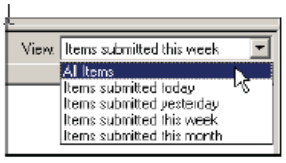


- **Message not found** - Go to step 4 and look for the message in the History queue.

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**.



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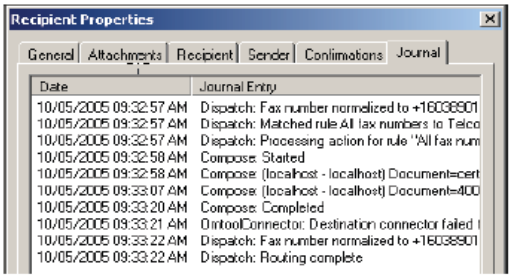
c Sort all items by the date submitted.

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

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