Omtool DMS Libraries v2.2 installation and integration guide for WorkSite™

February 1, 2008 (4.0339-AA)

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Section 1: Introduction

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

This section includes:

Omtool DMS Libraries integration with Interwoven WorkSite (1-1)

Installation components (1-2)

Deployment summary (1-2)

Release notes (1-2)

Related documentation (1-3)

Omtool DMS Libraries integration with Interwoven WorkSite

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

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

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

For more information on profiling documents to WorkSite, 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 the AccuRoute Desktop v2.2 Update to the Omtool server.

Note	The instructions in this guide are applicable only if you are running Omtool DMS Libraries v2.2

Deployment summary

To deploy Omtool DMS Libraries v2.2 for WorkSite:

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

Release notes

Enhancements

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

- *Enhancement:* Worksite 8.2 is now supported. Omtool DMS Libraries v2.2 for WorkSite has been qualified with AccuRoute Desktop v2.2.

Resolutions

Omtool DMS Libraries v2.2 for WorkSite include the following resolved issues.

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- AccuRoute Desktop was not deleting temporary files (called "stub documents"), from some DMS applications. See Knowledge Base Article K03805.
- 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. See Knowledge Base Article K03889. (Go to Online resources on the inside front cover.)
- When using iManage Desksite and iManage Worksite server with impersonation passwords enabled, the iManage connector failed to route documents to the DMS application. The error code in the journal of the message was Access Denied (0x80004005), however, there was no error event generated in the Application Event Log. See Knowledge Base Article K03596. (Go to Online resources on the inside front cover.)

Limitations

Omtool DMS Libraries v2.2 for WorkSite includes no known limitations.

Related documentation

- AccuRoute Desktop installation guide - http://www.omtool.com/documentation/AccuRoute/v22/AccuRouteDesktop/AccuRouteDesktopV22InstallGuide.pdf
- AccuRoute Desktop users guide - http://www.omtool.com/documentation/AccuRoute/v22/AccuRouteDesktop/AccuRouteDesktopV22UserGuide.pdf
- Sending a message to WorkSite using AccuRoute Desktop and the Enhanced Profile Dialog - http://www.omtool.com/documentation/dmslibraries/v22/WorkSite/OmtoolDMSLibrariesV22WorkSiteEnhancedQuickStartGuide.pdf
- Sending a message to WorkSite using AccuRoute Desktop and the Standard Profile Dialog - http://www.omtool.com/documentation/dmslibraries/v22/WorkSite/OmtoolDMSLibrariesV22WorkSiteStandardQuickStartGuide.pdf
- Administrator help - http://www.omtool.com/documentation/omtoolserver/v331/admin/

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Section 2: Requirements

This section includes:

Server requirements (2-1)
Client requirements (2-1)
Supported Interwoven versions (2-2)

Server requirements

The system where you install the DMS connector for WorkSite 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.

- ❒ WorkSite™ v8.2/v8.1.1/v8.0
- ❒ WorkSite™ v8.2/v8.1.1/v8.0 installed on the Omtool server must not integrate with Microsoft Word.
- ❒ Tier 2 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
- ❒ WorkSite™ Client (DeskSite™ or FileSite™) must be installed

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Supported Interwoven versions

The following WorkSite™ versions are supported:

- DeskSite™ v8.2/v8.1.1/v8.0 by Interwoven, Inc.
- FileSite™ v8.2/v8.1.1/v8.0 by Interwoven, Inc.

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Section 3: Installation

This section includes:

Configuring the impersonation password (AccuRoute environments only) (3-1)
Adding the WorkSite connector (3-2)
Completing the WorkSite connector configuration wizard (3-4)
Upgrading an existing iManage connector to WorkSite (3-8)

Configuring the impersonation password (AccuRoute environments only)

WorkSite supports using an impersonation password. You must configure an impersonation password on the WorkSite server and configure the Omtool DMS Libraries on the AccuRoute server to use the impersonation password when logging in to the WorkSite server. (The impersonation password becomes critical when the AccuRoute server cannot obtain the WorkSite login credentials of the AccuRoute Desktop user. This is always the case when the WorkSite server accepts trusted authentication.) When the AccuRoute server uses the impersonation password configured on the WorkSite server, the AccuRoute server can route documents to the WorkSite server on behalf of AccuRoute Desktop users.

To configure the impersonation password:

1. Start the Service Manager for the WorkSite server.
2. Select a WorkSite server, click **PROPERTIES** on the menu bar, and select **SERVICE PROPERTIES**.
3. Go to the **SECURITY** section, select **ENABLE IMPERSONATION**, type the impersonation password in the **PASSWORD** text box, and click **OK**.
4. Reboot the WorkSite server.

Continue to Adding the WorkSite connector.

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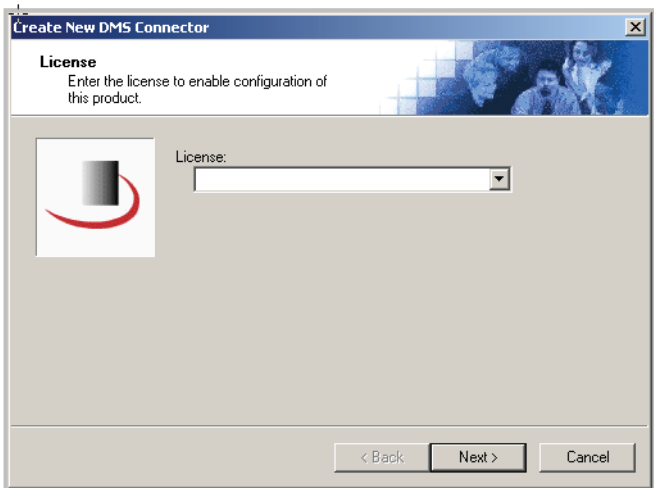
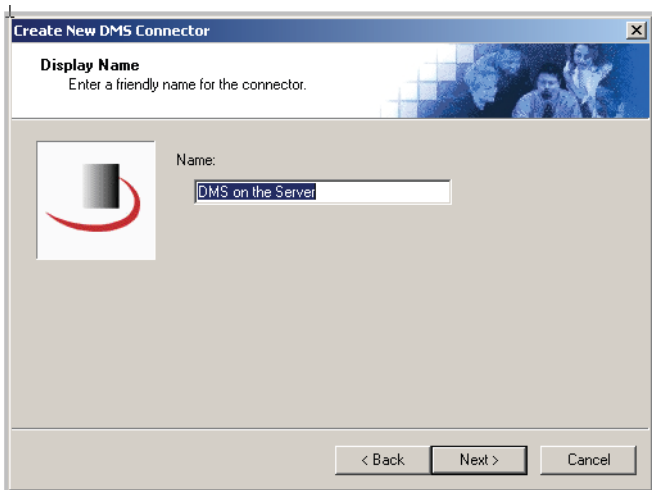
Adding the WorkSite connector

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



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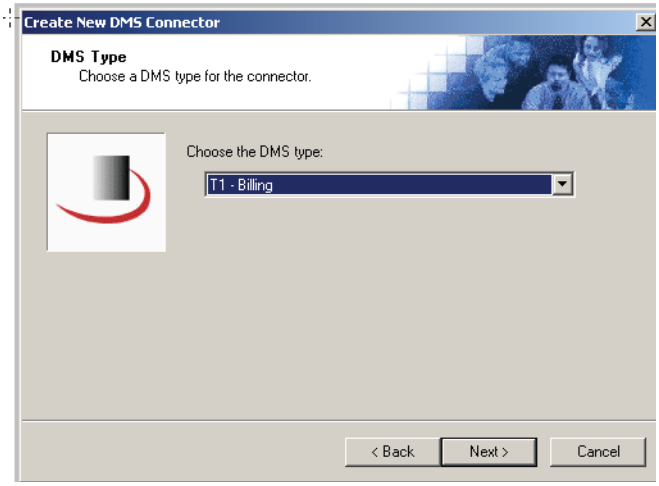
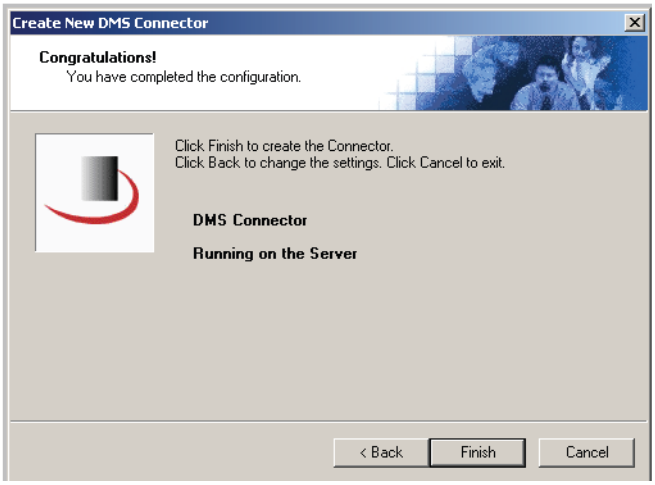
3 Type a friendly name for this connector in the **NAME** text box and click **NEXT**. The DMS Type window appears.



4 Select **T2 - WORKSITE** 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 WorkSite.

Continue to Completing the WorkSite connector configuration wizard.

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Completing the WorkSite connector configuration wizard

All Omtool applications on the same system share the Omtool DMS Libraries configuration (3-4)
Configuring a new WorkSite connector (3-4)
Configuring an existing WorkSite connector (3-7)

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

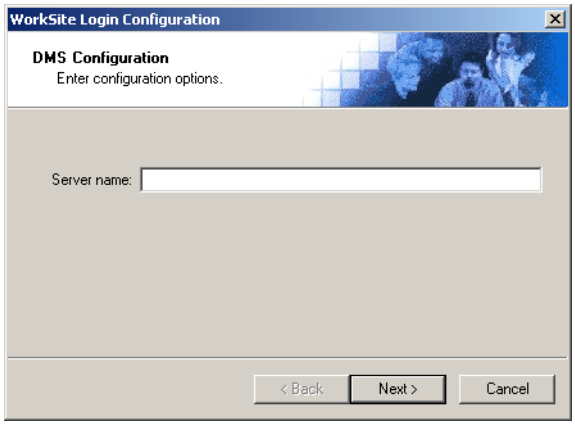
When multiple Omtool applications are installed on the same system, these applications share the same DMS configuration data. If you make changes to the DMS configuration settings for one Omtool application, those changes affect all Omtool applications installed on the system.

Configuring a new WorkSite connector

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

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

Enter the WorkSite server name on this window.



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To complete the configuration wizard for a new WorkSite connector:

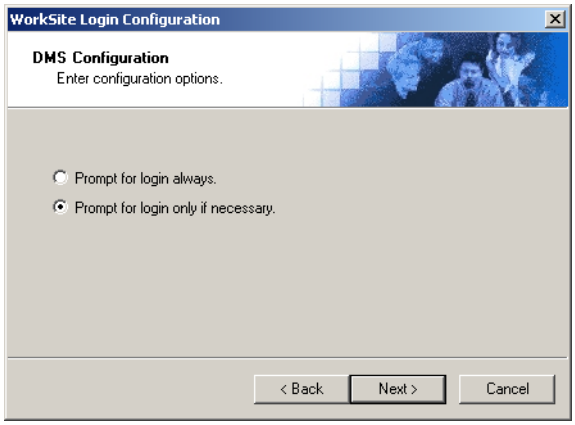
Important If you are using WorkSite 8.0, you must select "Use Enhanced Application Integration Dialog" in Step 5.

1 Type the WorkSite server name in the **SERVER NAME** text box.

If you are configuring the WorkSite 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.

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

2 Click **NEXT**. The WorkSite Login Configuration window appears.



3 Select an authentication option:

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

PROMPT FOR LOGIN ONLY IF NECESSARY - Select this option if the WorkSite server should prompt the Omtool user for WorkSite 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.

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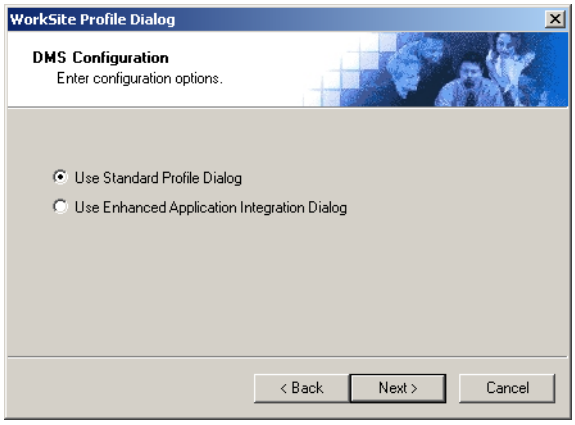
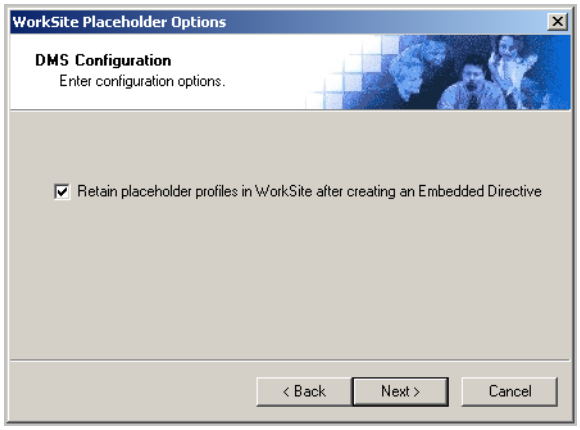
4 Click **NEXT**. The WorkSite Profile Dialog window appears.



5 Select a WorkSite dialog option and click **NEXT**. The available options are **USE STANDARD PROFILE DIALOG** and **USE ENHANCED APPLICATION INTEGRATION DIALOG**.



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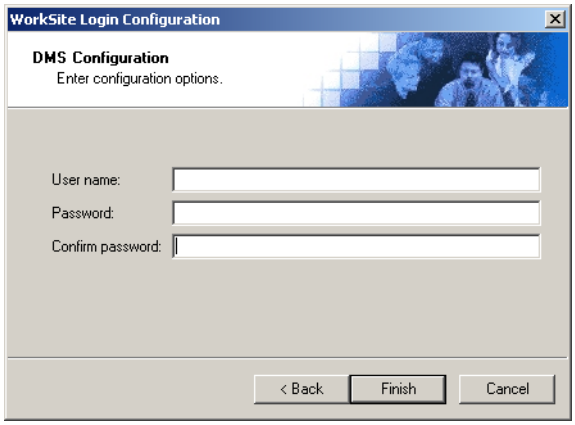
6 **RETAIN PLACEHOLDER PROFILES IN WORKSITE AFTER CREATING AN EMBEDDED DIRECTIVE** is selected by default. When selected, this option retains the placeholder profile in WorkSite when the user adds a new WorkSite destination. If you clear this selection, the placeholder profile is deleted after the new WorkSite destination is added to AccuRoute Desktop.

7 Click **NEXT** and specify the Omtool user's WorkSite login credentials. Type the user name and password in the **USER NAME**, **PASSWORD**, and **CONFIRM PASSWORD** text boxes.



If you are configuring the DMS connector on an AccuRoute server, provide the user name for an administrative account that has the required permissions to access the stub document (document placeholder) on the WorkSite server and overwrite it with the actual document being routed, and provide the impersonation password you configured on the WorkSite server.

The AccuRoute server logs in to the WorkSite server with this user name only when the AccuRoute server cannot obtain the user name associated with the AccuRoute Desktop user.

8 Click **FINISH**.

Configuring an existing WorkSite connector

To complete the configuration wizard for an existing WorkSite connector:

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

2 Click the **ADVANCED** tab.

3 Locate the **DMS CONFIGURATION** section, and click **CONFIGURE**. The WorkSite Login Configuration window appears.

4 Perform steps one through eight in Configuring a new WorkSite connector (3-4).

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Upgrading an existing iManage connector to WorkSite

Use the following procedure to upgrade your existing iManage connector to the WorkSite connector.

Note Contact Omtool Customer Service for a new Tier 2 License code for the WorkSite integration.

To upgrade the iManage connector:

1. Rename the existing iManage DMS connector **ROUTING IDENTIFIER** to "Old iManage".
2. Rename the new WorkSite DMS connector **ROUTING IDENTIFIER** to "iManage". Verify that old Embedded Directives created using the iManage DMS connector now successfully route to the new WorkSite DMS connector.
3. Change the server configuration so that billing lookup and validation is done against the WorkSite DMS connector instead of the iManage DMS connector.
4. Change the configuration for Registered Users to enable use of the WorkSite DMS connector and disable use of the iManage DMS connector.
5. Send a test message using the new WorkSite DMS connector. (Go to Section 8: Testing.)
6. Delete the old iManage DMS connector.

Note Note: To ensure that old routing sheets work with the new connector do not use the new connector until it's routing identifier is named to match the original name.

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Section 4: Required server configuration

This section includes:

Enabling WorkSite as a recipient type in AccuRoute Desktop (4-1)

Enabling WorkSite as a recipient type in AccuRoute Desktop

If you have added support for WorkSite 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 WorkSite 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 **WorkSite**.
5. Click **OK** to save your changes.

Now when you start AccuRoute Desktop, WorkSite 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 5: Optional server configuration

This section includes:

Changing the label of a document (5-1)
Configuring document link (5-2)

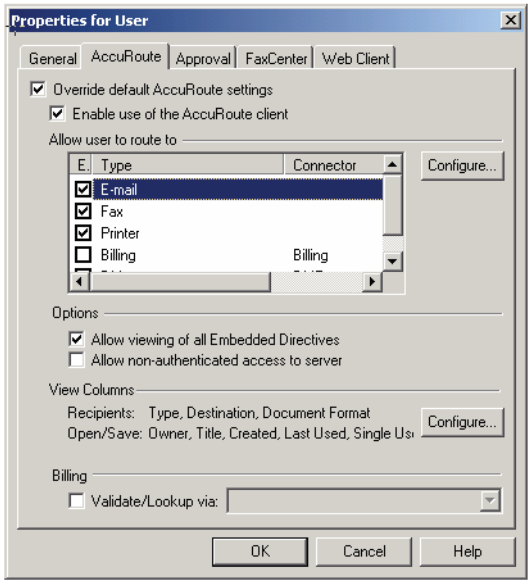
Changing the label of a document

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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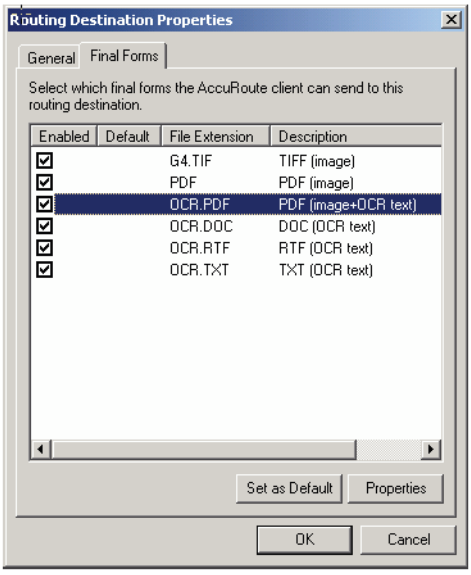
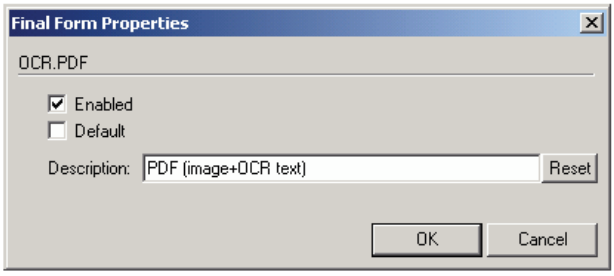
4 Click CONFIGURE and click the FINAL FORMS tab.

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.

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)

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Omtool provides you with the ability to generate a confirmation e-mail that includes an active link to the document stored in WorkSite. Clicking the http link opens the document that was stored in WorkSite 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 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.

   ```
   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 ATE_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

Important If you are using DeskSite and/or FileSite v8.0, you must select "Use Enhanced Application Integration Dialog."

To add WorkSite functionality to AccuRoute Desktop:

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

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

Continue to Client deployment methods (6-1)

Client deployment methods

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

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

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Configuring WorkSite 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 WorkSite 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 WorkSite. Select the settings that should apply to all workstations in your environment.
3. Navigate 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. Navigate 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 WorkSite. When you are ready to deploy WorkSite, launch setup.exe in the AccuRouteDesktop2.2 directory.

Configuring WorkSite manually

To configure WorkSite manually:

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

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Section 7: Optional billing configuration

This section includes:

Enabling billing on the connector (7-1)

Enabling billing in the Billing component (7-2)

Enabling billing for registered users (7-2)

Automatic billing entry (7-2)

To use billing when profiling your WorkSite message, enable billing on the WorkSite connector, and then enable it for Registered Users.

Enabling billing on the connector

When enabling billing on the connector, the parent field in the matter properties of the connector must point to the display name of the client field and not the actual field name.

Billing field names are case sensitive. When configuring Author, Client, and Matter fields, make sure to use the correct case. Using the incorrect case causes billing validation to fail; lookups, however, are successful.

To enable Billing on the WorkSite connector:

1. Click **CONNECTORS** in the console tree, and double-click the WorkSite connector.
2. Click the **ADVANCED** tab.
3. Go to the **BILLING** drop-down list, select either **BILLING SELECTABLE** or **BILLING MANDATORY**.
4. Where applicable, configure the **AUTHOR**, **CLIENT**, and **MATTER** fields in the **FIELDS** section.

   In this section you can add new fields, remove existing fields, and specify the properties for fields in the list.

   In the **PROPERTIES** section, you can select the field's **DISPLAY NAME**, select **MUST BE VALIDATED AGAINST THE DMS'S CODES**, how to validate (**VALIDATE FIELD**, **LOOKUP FIELD**, and **PARENT**), as well as set the **MINIMUM LENGTH** and **MAXIMUM LENGTH** of the billing field. If an option is greyed out, it is not available for use.
5. Click **OK** to save the properties of the billing fields.
6. Change the Routing Identifier in the **ROUTING IDENTIFIER** text box if desired. It is populated with a default Routing Identifier.
7. Click **OK** to save your changes.
8. Continue to Enabling billing in the Billing component (7-2).

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Enabling billing in the Billing component

If you are using CostRecovery, you also need to enable billing in the Billing component.

To enable billing in the Billing component:

1. Click **COMPONENTS** in the console tree, and double-click the **BILLING** component.
2. Click the **CONFIGURATION** tab.
3. Select **ENABLE COLLECTION OF BILLING DATA**.
4. Add, Delete, or configure the Properties in the Omtool Property list if needed.
5. Click **OK**.
6. Continue to Enabling billing for registered users (7-2).

Enabling billing for registered users

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

To enable Billing for registered users:

1. Click **REGISTERED USERS** in the console tree and double-click an individual user in the details pane, or right-click **REGISTERED USERS** in the console tree and select **USER DEFAULTS**.
2. Click the **ACCUROUTE** tab.
3. Select **VALIDATE/LOOKUP VIA**, then select the **WORLDOX** connector from the drop-down list.
4. Click **OK** to save your changes.

   Billing Entry is now available in new instances of AccuRoute Desktop.
5. Continue to Automatic billing entry (7-2).

Automatic billing entry

Automatic billing entry functionality automatically inserts billing information from the message profile window. This functionality is available only with:

- AccuRoute server v2.1 or higher
- AccuRoute Desktop v2.2 or higher

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If you want to make automatic billing entry available in AccuRoute Desktop, you must modify the AccuRoute properties of Registered Users. A DMS that supports billing must be installed and configured, and billing must be enabled before you can use the automatic billing entry functionality.

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

Section 8: Testing

This section includes:

Standard profile dialog (8-1)

Enhanced profile dialog (8-4)

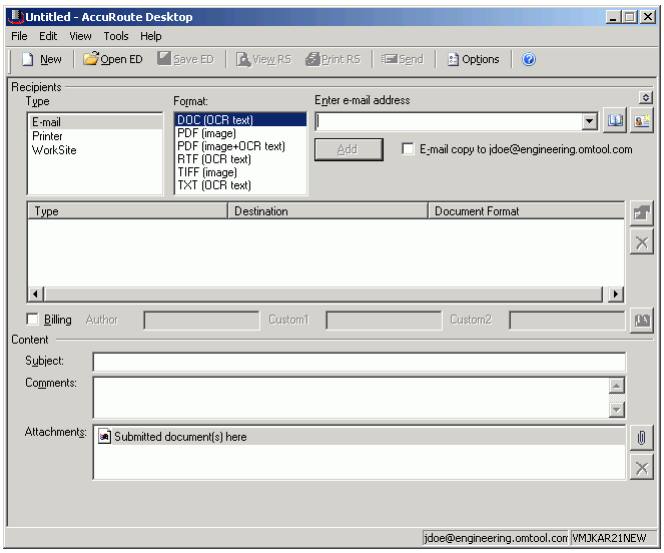
To test the installation and configuration of Omtool DMS Libraries v2.2 for WorkSite, send a message using AccuRoute Desktop. WorkSite includes two options, the Enhanced Profile Dialog and the Standard Profile Dialog.

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

Standard profile dialog

To send a message to WorkSite™ 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 **WORKSITE** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.

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

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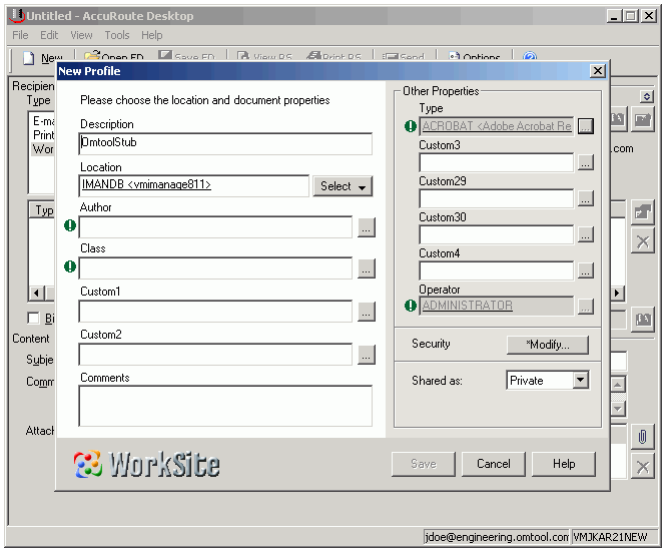
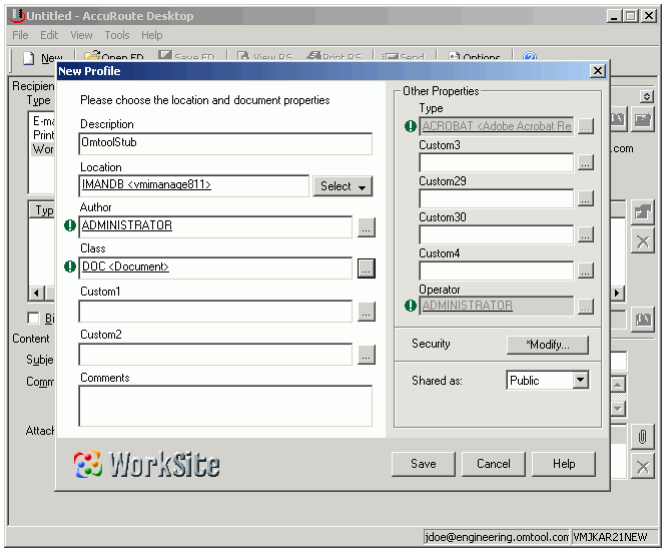
3 Click **ADD**. The New Profile window appears.



4 Enter any required fields.



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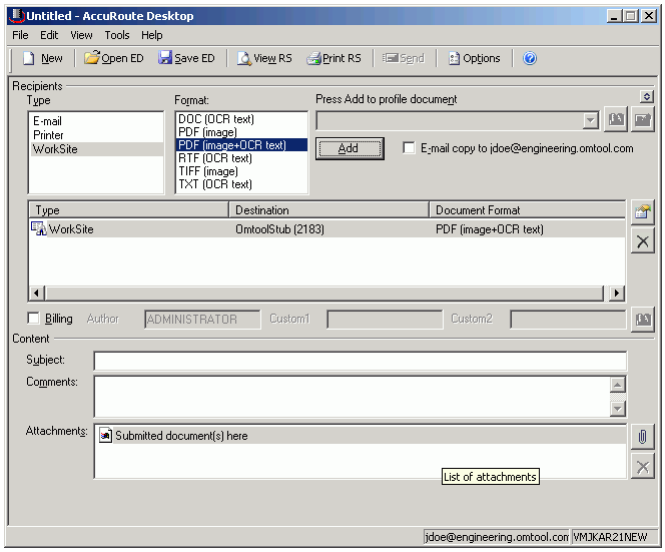
5 Complete any optional information if desired and click **SAVE**. An OmtoolStub destination appears in the message.



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

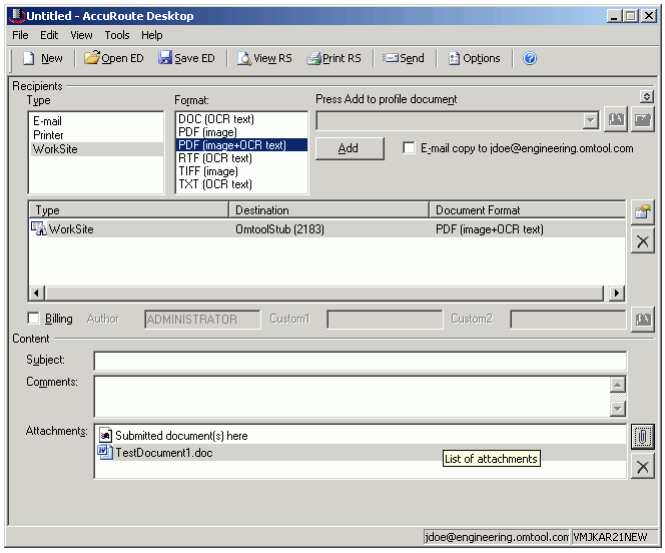
6 Add content to your message.

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

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

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

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



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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.)

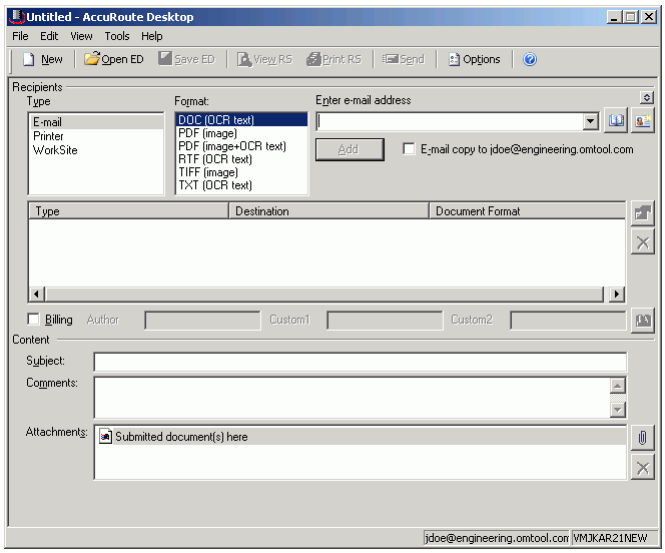
Save the message as an Embedded Directive - Click **SAVE ED** on the toolbar, type a title for the Embedded Directive, and click **SAVE**.

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.)

Enhanced profile dialog

To send a message to WorkSite™ 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 **WORKSITE** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.

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

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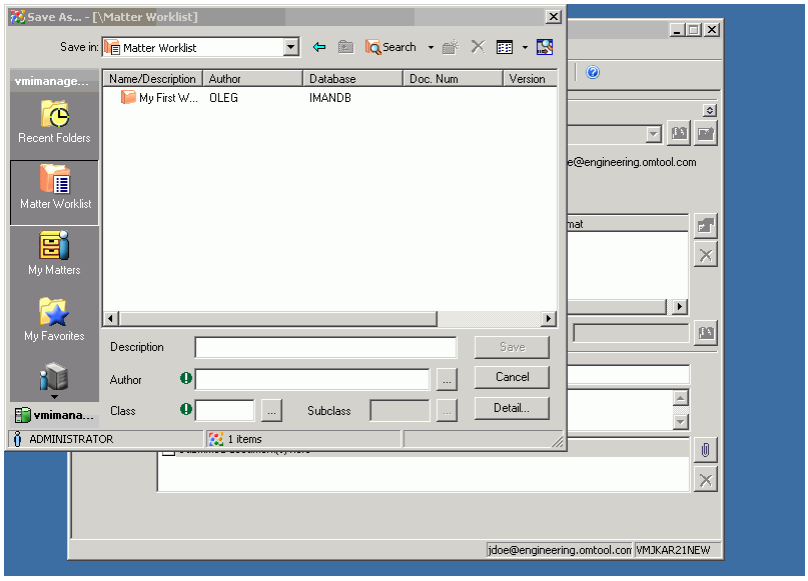
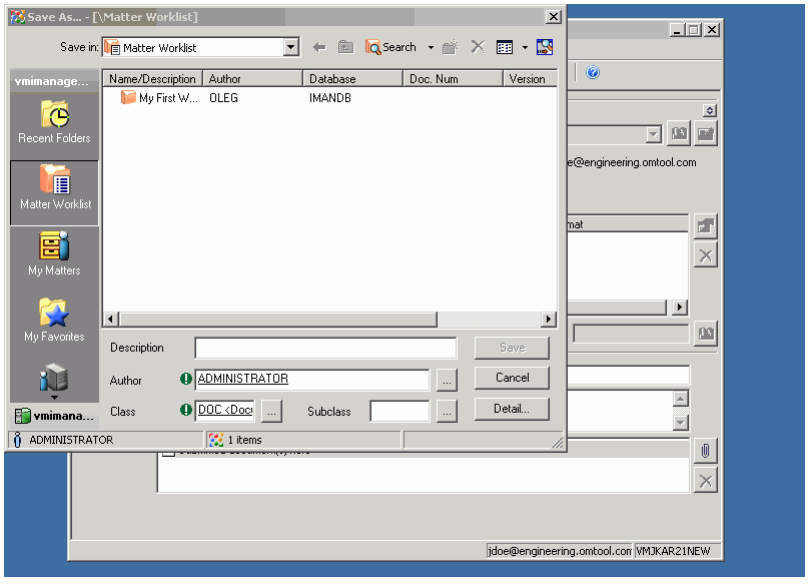
3 Click **ADD**. The Save As [\Matter Worklist] window appears.



4 Enter **AUTHOR** and **CLASS** (required fields).



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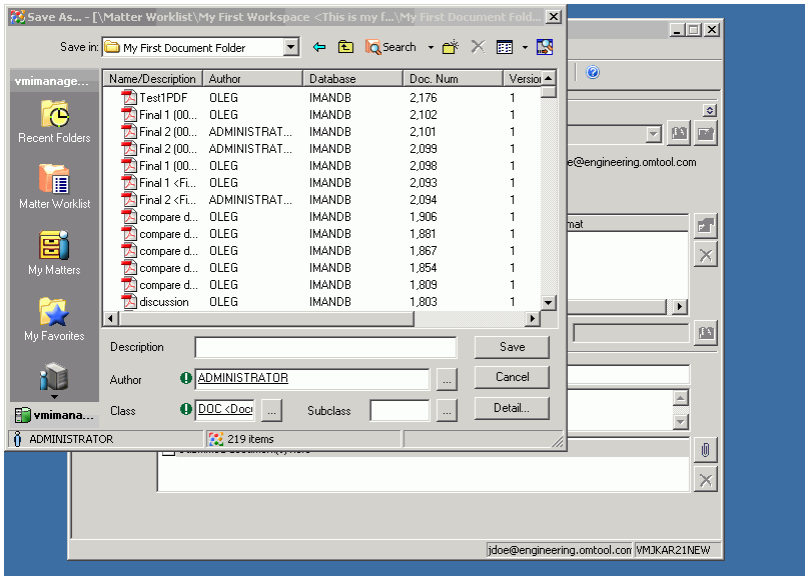
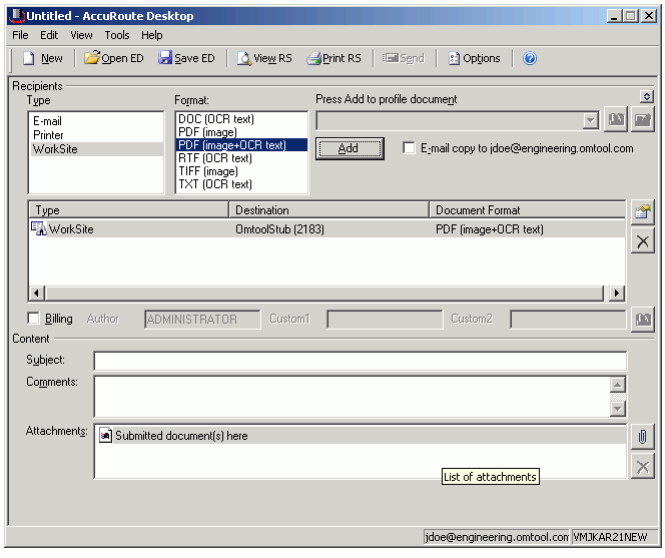
5 Double-click the worklist and subsequent folders until you reach the desired location for your document and then click **SAVE**.



6 Complete any optional information if desired and click **SAVE**. An OmtoolStub destination appears in the message.



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

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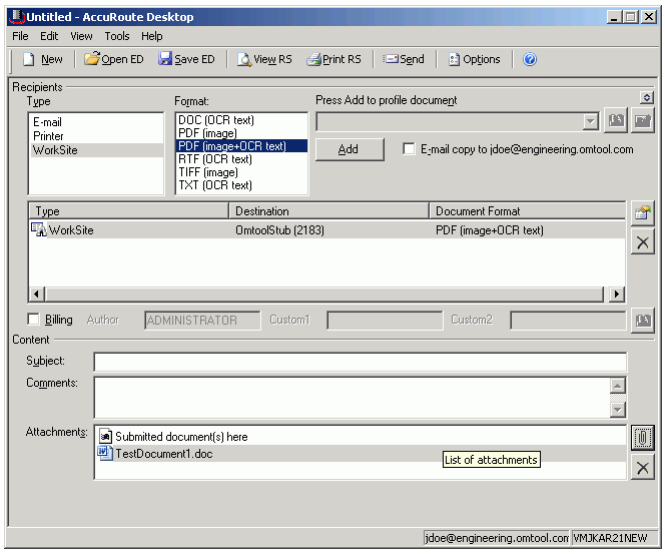
7 Add content to your message.

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 delivery mechanism (9-1)

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

Troubleshooting the multifunction device (9-4)

Troubleshooting the client (9-4)

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

Detecting workflow issues

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

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

Continue to Troubleshooting the message on the Omtool server.

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Troubleshooting the message on the Omtool server

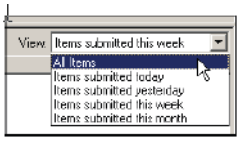
There are two important questions that can be resolved when troubleshooting a message on the Omtool server:

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

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

To locate the message on the Omtool server:

1. Start the Administrator.
2. Go to **OMTOOL SERVER ADMINISTRATOR > [SERVERNAME] > MESSAGES**.
3. Look for the message in the In Process queue:
   a. Click **IN PROCESS**.
   b. View **ALL ITEMS**.



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

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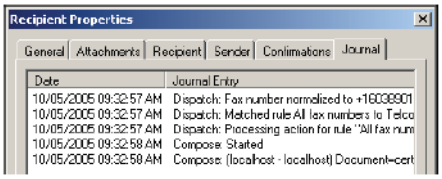
Omtool server stops processing the message (for example, the message seems to be stuck in a processing queue), restart all the Omtool services.

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

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

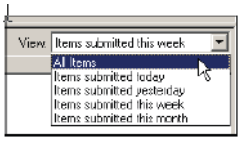


- **Message not found** - Go to step 4 and look for the message in the History queue.

4 Look for the message in the History queue:

a Click **HISTORY**. The message could be in either the Successful barometer or the General Failure barometer.

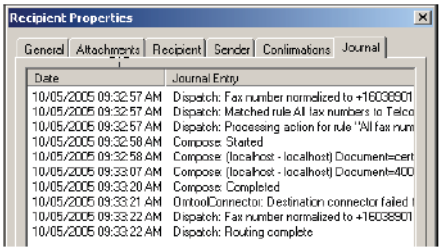
b View **ALL ITEMS**.



c Sort all items by the date submitted.

d Look for the message.

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



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

If the journal states that Omtool server delivered the message but it still has not arrived at its destination, this indicates that the Omtool server transferred the message to WorkSite successfully. Do some advanced troubleshooting on WorkSite to determine why the message is not being delivered

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

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