Omtool™ Healthcare Suite installation and configuration guide

For AccuRoute® v3.01

January 15, 2010

Omtool support and sales

Customer service and technical support

Contact Omtool Customer Service or Technical Support using any of the following methods:

- **Phone**: 978 327 6800 or 888 303 8098 (toll-free in the US)
- **Fax**: 978 659 1301
- **E-mail**: customerservice@omtool.com or support@omtool.com

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- **Fax**: 978 659 1300
- **E-mail**: sales@omtool.com

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Section 4: Configuring AccuRoute Server

Section 5: Installing Image-In Business Server

Section 1: Overview

This section includes:

Related documentation (1-1)

The installation and configuration guide for Omtool™ Healthcare Suite contains instructions on installing and configuring the AccuRoute Server v3.01, an enterprise application. It is written for systems administrators with detailed knowledge of Windows operating system and the LAN.

In addition to the AccuRoute Server, you must also install and configure the following updates/clients to set up your environment:

▸ Healthcare update

▸ AccuRoute® Web Client

▸ Image-In™ Queue

▸ Image-In™ Acquisition Client

▸ AccuRoute® Desktop Client

▸ Image-In™ Direct Capture

▸ Image-In™ Business - Document Capture and Archive System

Important   This guide contains instructions on Accuroute Server installation and configuration only.

Related documentation

Following are the Healthcare Suite client documentation links:

- Image-In Queue installation and configuration guide - http://www.omtool.com/documentation/AccuRoute/v3.01/IIQ/IIQInstallGuide.pdf

- Image-In Queue online help - http://www.omtool.com/documentation/AccuRoute/v3.01/IIQ/UserHelp/WebHelp/IIQHelp.htm

- Image-In Acquisition Client - http://www.omtool.com/documentation/OmtoolHealthCare/ForAccuRoutev3.01/Clients/ImageInAcquisitionClient/IIAInstallUserGuide.pdf

- Image-In Direct Capture - http://www.omtool.com/documentation/OmtoolHealthCare/ForAccuRoutev3.01/Clients/ImageInDirectCapture/IIDCUserGuide.pdf

- Image-In Business Scan and Index guide - http://www.omtool.com/documentation/OmtoolHealthCare/ForAccuRoutev3.01/Clients/ImageInBusiness/ImageInBusiness.pdf

Section 2: Requirements

Before you can install the AccuRoute server on a system, you must configure the system. This section discusses hardware and software requirements for AccuRoute v3.01 server and the required configurations needed on the server.

This section includes:

Hardware and software requirements

The AccuRoute server installation requires a dedicated system that meets the following minimum requirements:

❑   Windows NT domain computer that always runs in the same domain and is not a domain controller

❑   Dual core processor; 2 GHz; 4GB of RAM; RAID 5W with 100 GB of disk space; DVD-ROM drive; and Microsoft mouse or compatible pointing device

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Note   Omtool recommends using a core for each compose thread that is configured to do OCR. The AccuRoute server comes with 4 Compose threads. You can increase the number of threads as needed. Contact Omtool sales for more information.

❑   Windows 2008, 2003 Standard Edition SP2 64 bit

❑   IIS with the following components: Common Files, Internet Information Services Manager, SMTP Service (for SMTP connector which is installed with the server) and World Wide Web Service.

Note   In IIS v6.0 or later, configure to allow Active Server Pages. This configuration is located in the Web Service Extensions node in the IIS console tree.

❏   Disabled **Internet Explorer Enhanced Security Configuration** (Windows Component).

      If this component is enabled, you cannot install AccuRoute server v3.01. After you disable the component, reboot you system before proceeding with the server installation. For instructions on how to verify that the component is disabled, see Verifying Internet Explorer Enhanced Security Configuration is disabled (2-7)

❏   Microsoft .Net Framework 3.0 or higher versions (this is required to install SQL Express 2008)

❏   Microsoft Internet Explorer 7 or later

❏   Acrobat Reader 7.0 or later

❏   Internet connection

Pre-requisite check for 64 bit systems

For 64 bit systems, configure the following.

Configure IIS to run 32-bit applications

To configure IIS to run 32 bit applications:

1   Open a command prompt, and enter:

2   `cscript.exe C:\InetPub\adminscripts\adsutil.vbs set W3SVC/AppPools/Enable32bitAppOnWin64 1`

3   Press **ENTER**.

      For information on related command to switch modes, see http://support.microsoft.com/kb/894435.

Configure Microsoft.Net 2.0

To register asp.net in 32 bit mode:

1   Open a command prompt, and enter:

      `C:\Windows\Microsoft.net\Framework\v2.0.50727\aspnet_regiis.exe -i`

2   Press **ENTER**.

Note   Note: This is required for installing the AccuRoute Web Client.

Additional software requirements for a local composer

The AccuRoute server setup automatically installs a local composer on the AccuRoute server. You can also install a Remote Composer if needed. For installation instructions, see Installing Remote Composer (9-1).

The system where you are installing the Remote composer must have the following applications. They are required and recommended for message conversion:

- ❒ Microsoft Visio 2007 for *.VSD and *.VDX message attachments.

- ❒ Crystal Reports v10.0 or earlier for *.RPT message attachments

- ❒ Microsoft Paint - This is necessary where the AccuRoute Desktop has default routing sheet of Batch - Simple. In this case, if MS Paint is not available on the server, AccuRoute Desktop will not allow you to view and or print a Routing Sheet that has bar code.

- ❒ Microsoft Word 2007 for *.DOC Routing Sheet templates

Important	After you instal Microsoft Word, you must open a Word document and register the software. You must also verify that pop ups do not appear to ensure successful composition of messages in the AccuRoute server.

Note	Routing Sheet templates are provided in *.DOC and *.OMTPL format, and these templates can be edited in Word and WordPad respectively. If *.DOC templates are used, then Word is required on the composer because the composer converts all *.DOC Routing Sheet templates using Word. The composer cannot be configured to use any other conversion method.

- ❒ Microsoft Office 2007 for *.DOC, *.DOCX, *.PPT, *.PPTX, *.XLS, and *.XLSX message attachments (recommended)

Important	Visual Basic for Applications is required for PowerPoint document conversion. You must install this component for PPT and PPTX document formats to compose successfully on the AccuRoute Server. If this component is not installed, and you try to compose a PowerPoint document, you will get an error.

If multiple versions of an application are deployed in the LAN, the most recent version must be installed on the composer. For example, if Office 2007 and 2003 are deployed, then Office 2007 must be installed on the composer.

An item is required only if the composer must be able to convert the documents associated with the application. For example, if Microsoft Office is not deployed in the LAN, the requirement does not apply.

Additional installation requirements

An AccuRoute server installation also requires the following:

- ❒ AccuRoute server installation CD

- ❒ Omtool service account. For instructions on how to create the Omtool service account, see [Creating Omtool service account](#) (2-4)

❒ Windows user account that belongs to the local Administrators group. For instructions on how to create this group, see Creating AccuRoute Admins group (2-5)

❒ AccuRoute server license key

❒ Windows installation CD or access to the Windows setup on a network share

❒ Turn Windows firewall off.

This is necessary in order to allow exceptions for the mmc.exe and the DCOM port (135). If the firewall is on, you will get the following message when you try to open the Omtool Server Administrator after installing the server: `0x800706ba) The RPC server is unavailable.`

❒ Configuring DCOM. For instructions, see Configuring Distributed COM permissions (2-5)

❒ Installing MS SQL application. For instructions, see Installing a Microsoft SQL application on the AccuRoute server (2-7)

❒ Fax boards/modules that has been installed, configured, and tested. This is required only for an AccuRoute server that supports faxing. For information on fax board installation, consult the: Gridborg modem driver installation and configuration guide.

❒ Verifying the **NtfsDisable8dot3NameCreation** registry value is set to 0

You must enable 8.3 Name Creation on NTFS Partitions to allow Ghostscript to work with long filenames or with spaces / odd characters in the filename during conversion. In case your system does not have the registry key set to 0, you must manually enable the key and set the value to 0. For instructions, see Enabling 8.3 Name Creation on NTFS Partitions (2-8).

Creating Omtool service account

The Omtool service account is a dedicated Windows user account that is designed to run Omtool services on the AccuRoute server.

Important   Omtool recommends that you do not change this account or the password associated with it.

The Omtool service account user

❒ Must belong to Domain Users group in the domain where the AccuRoute server is being installed

❒ Must belong to local Administrators group on the system where the AccuRoute server is being installed

❒ Must have a password that never expires

You can create or select a Windows user account as the Omtool service account. For instructions on creating Windows user accounts, consult Windows help.

Creating AccuRoute Admins group

The AccuRoute Admins group consists of all AccuRoute users who run the Omtool Server Administrator (either on the AccuRoute server or on a Remote Administrator). These AccuRoute users must have Distributed COM access, launch, and configuration permissions on the AccuRoute server.

To create an AccuRoute Admins group:

1   Go to Active Directory or LDAP. Locate the domain where the AccuRoute server is being installed.

2   Create a group for Omtool Server Administrator users. Name this group AccuRoute Admins.

3   Add all AccuRoute users who will run the Omtool Server Administrator to the AccuRoute Admins group.

4   Log in to the system where the AccuRoute server is being installed using an account that belongs to the local Administrators group.

5   Add the AccuRoute Admins group to the local Administrators group.

When you need to add additional users to run the Omtool Server Administrator, you can add them to the AccuRoute Admins group.

Configuring Distributed COM permissions

The following users and groups require Distributed COM access, launch, and configuration permissions on the AccuRoute server:

- Omtool service account user
- AccuRoute Admins group
- SYSTEM group on the AccuRoute server
- INTERACTIVE group on the AccuRoute server

Tip   SYSTEM and INTERACTIVE are built-in accounts that are not visible in the list of local users and groups. SYSTEM is a group for Windows services that are configured to run in the local Windows security context. INTERACTIVE is a group to which the current local Windows user is automatically added.

Configuring DCOM permissions on Windows 2008 and on Windows 2003

To configure DCOM permissions on Windows 2008 and on Windows 2003:

1 Log in to the system where you will install AccuRoute server using the login credentials of the local Administrators group.

2 Click **START** and select **RUN**. Enter `dcomcnfg` and click **OK**. The **Component Services** snap-in opens.

3 Expand **COMPONENT SERVICES > COMPUTERS**. Right-click **MY COMPUTER** and select **PROPERTIES** from the menu options.

4 Click the **COM SECURITY** tab.

5 Under **Launch and Activation Permissions**, click the **EDIT LIMITS** button, and then click the **ADD** button.

6 Add **ANONYMOUS LOGON** in the **Permissions** list, select the **ALLOW CHECK BOX TO ALLOW THE LOCAL LAUNCH** permission, **LOCAL ACTIVATION** permission, **REMOTE LAUNC**h permission, and **REMOTE ACTIVATION** permission for the selected group

7 Click **OK** twice to save changes.

8 Restart the system for these configuration changes to take effect.

Required COM permissions for remote AccuRoute Intelligent Device Client

When you install the AccuRoute server, the AccuRoute Intelligent Device Client is installed by default. No separate installation of the client is necessary. However, if need to install the AccuRoute Intelligent Device Client on a separate system, you must configure the following DCOM permissions for the Anonymous_User user.

To give Anonymous_Logon COM permissions:

1 Login to the system where you will install the AccuRoute server using an account that belongs to the Administrator.

2 Click **START > CONTROL PANEL > ADMINISTRATIVE TOOLS > COMPONENT SERVICES**.

3 In the console, expand **COMPONENT SERVICES > COMPUTERS**.

4 Right click **MY COMPUTER** and select **Properties** from the drop down menu.

5 Click **COM SECURITY**.

6 In the **Access Permissions** section, click **EDIT LIMITS**. The **ACCESS PERMISSION** page opens.

7 For user **Anonymous_logon**, select **LOCAL ACCESS** and **REMOTE ACCESS** permissions.

8 Click **OK** to close the page.

9 In the **Launch and Activate Permissions** section, click **EDIT LIMITS**. The **Launch Permissions** page opens.

10 For user **Anonymous_logon**, select **LOCAL LAUNCH**, **REMOTE LAUNCH**, **LOCAL ACTIVATION** and **REMOTE ACTIVATION** permissions.

11 Click **OK** and then **OK** to close the **Properties** page.

Installing a Microsoft SQL application on the AccuRoute server

The AccuRoute server utilizes MS SQL database to store and archive messages. It requires access to a SQL 2008 or 2005 or SQL Express 2008 database that can be installed locally or remotely.

If SQL Express 2008 is being used, then it must be installed local to the AccuRoute Server.

Use the following SQL database application.

- **SQL Server 2008 / 2005** - This comprehensive database application can be installed on:
  - ‣ the AccuRoute server
  - ‣ a system on the same switch as the AccuRoute server

    When installed on the AccuRoute server, SQL Server must only service databases for AccuRoute. Consider that installing an instance of SQL Server on the AccuRoute server might require the purchase of an additional SQL Server license.

Installing SQL 2008 or 2005

Consult the SQL Server documentation for information on SQL Server licensing and installation information.

Verifying Internet Explorer Enhanced Security Configuration is disabled

If this Windows component is enabled, you cannot install the AccuRoute server. After you disable the component, you must reboot your system before proceeding with the server installation.

To verify Internet Enhanced Security Configuration component is disabled:

1   Click **START > CONTROL PANEL > ADD OR REMOVE PROGRAMS**.

2   In the **Add or Remove programs** page, click **ADD/REMOVE WINDOWS COMPONENTS**. The **Windows Component wizard** opens.

3   Scroll down the Components list to find **Internet Explorer Enhanced Security Configuration**.

4   Verify that the component is disabled. If not disable the component.

5   Click **NEXT**, then click **FINISH**.

6   Reboot you system before proceeding with the installation.

Enabling 8.3 Name Creation on NTFS Partitions

You must enable 8.3 Name Creation on NTFS Partitions to allow Ghostscript to work with long filenames or with spaces / odd characters in the filename during conversion.

To enable 8.3 Name Creation on NTFS Partitions:

1   Click **START > RUN**.

2   Enter `regedit` and click **OK**.

3   In the **Registry Editor**, go to:
HKEY_LOCAL_MACHINE\SYSTEM\CURRENTCONTROLSET\CONTROL\FILESYSTEM

4   Right click the **NtfsDisable8dot3NameCreation** entry and select **MODIFY** from the drop down menu.

5   The **Edit DWORD Value** page opens.

6   In the **VALUE DATA** text box, enter 0.

7   Click **OK** to close the page.

Section 3: Installing the AccuRoute server

This section includes:

Introduction to installing the AccuRoute server

The AccuRoute server is installed with:

- specialized Windows services that carry out the document distribution responsibilities of the server

- components that complete message processing tasks

- connectors that connect the AccuRoute server with external systems that submit messages to the server and distribute them to their final destinations

- Omtool Server Administrator, the management application for the AccuRoute server

Note about CPU Core Check

The AccuRoute server is now hard-licensed to core-count (that is the server license has a built-in core count capability). This capability will not allow you to install the server on machine that has more with core counts than the license allows for. If the system has a higher core count, contact omtool sales for a license with a higher core count and then proceed with server installation.

The standard AccuRoute license allows use of product on a system with up to four (4) CPU cores. Anything larger than four CPU cores will need to go to the eight (8)core. The eight core will support eight to twelve CPU cores but anything larger will go to the Data Center Server. The Data Center Server will support hardware with sixteen (16) or greater CPU core.

Important   The installation will not continue without the proper license.

Installing AccuRoute server

The AccuRoute server setup program has a verification utility that checks the server for compliance with installation requirements. All installation requirements must be met before AccuRoute can be installed.

To install the server:

1   Log in to the system where the AccuRoute server is being installed using the Omtool Service account.

2   Insert the AccuRoute server installation CD into a CD-ROM drive, or go to a network copy of the AccuRoute server setup and run **\MESSAGESERVER\SETUP.EXE**.

The InstallShield wizard opens and configures your system for installation. When configuration is complete, you see the welcome message.
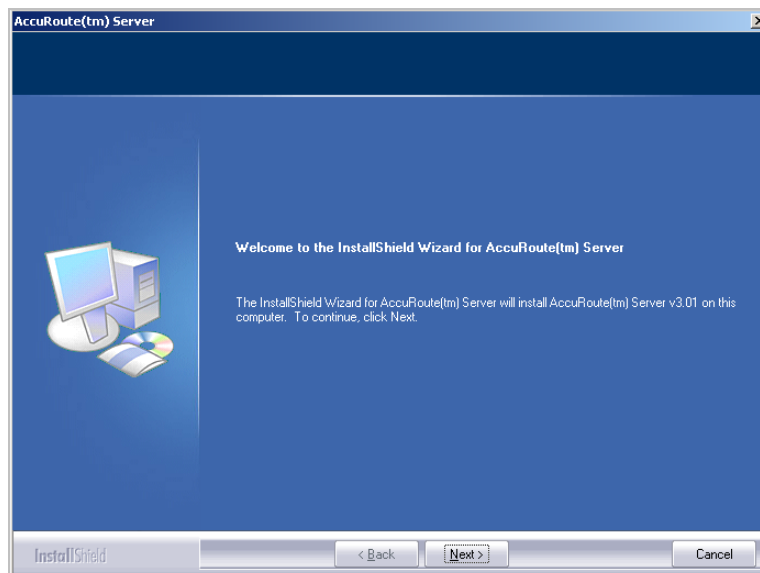
3   Click **NEXT**. The setup shows the license agreement page.

4 Select **I ACCEPT THE TERMS OF THE LICENSE AGREEMENT.**
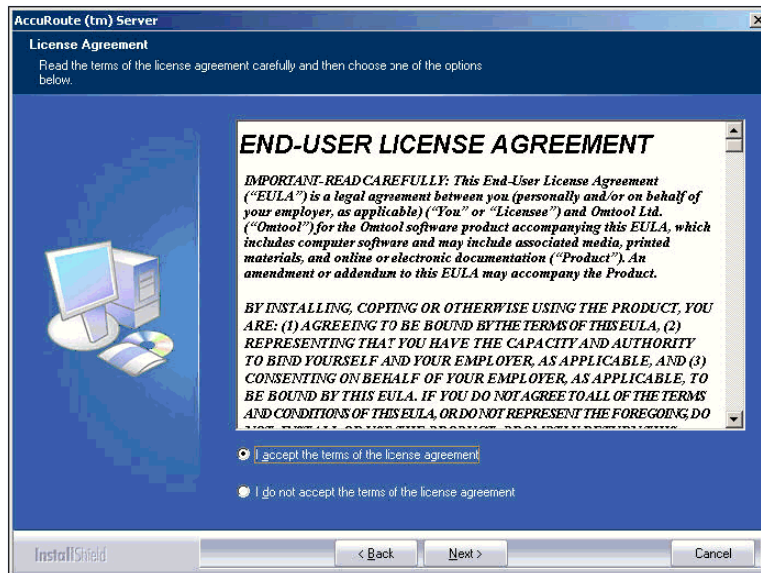
5 Click **NEXT**. The setup shows the installation options.
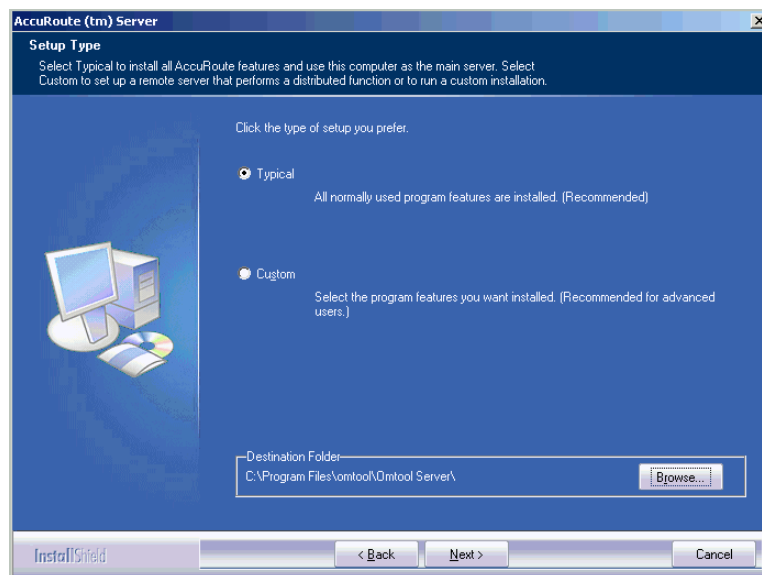
Note The default destination folder is **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER**
You can change the destination if necessary by clicking **BROWSE** and then browsing to the desired location. However, you cannot install the server on the root of a drive, for example, C:\

6 Select **CUSTOM** and then manually select ObjectArchive from the custom options. Verify that the following features are selected.

- ▲ Message Server
- ▲ Connector Package

- ▲ Component Package
- ▲ Omtool Server Administrator
- ▲ Client installs
- ▲ Server Tools

Important   If you select ObjectArchive option, verify that the MS SQL server must be same for the ObjectArchive and the AccuRoute databases.

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7   Click **NEXT**. The setup requests a license key.
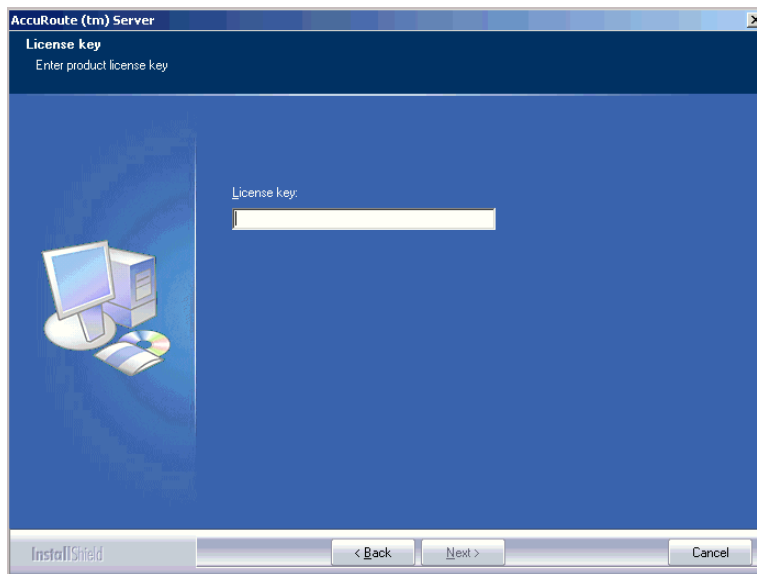
8   In the **LICENSE** text box, enter a valid license key and click **NEXT**. The setup checks the system for installation requirements and displays the results.

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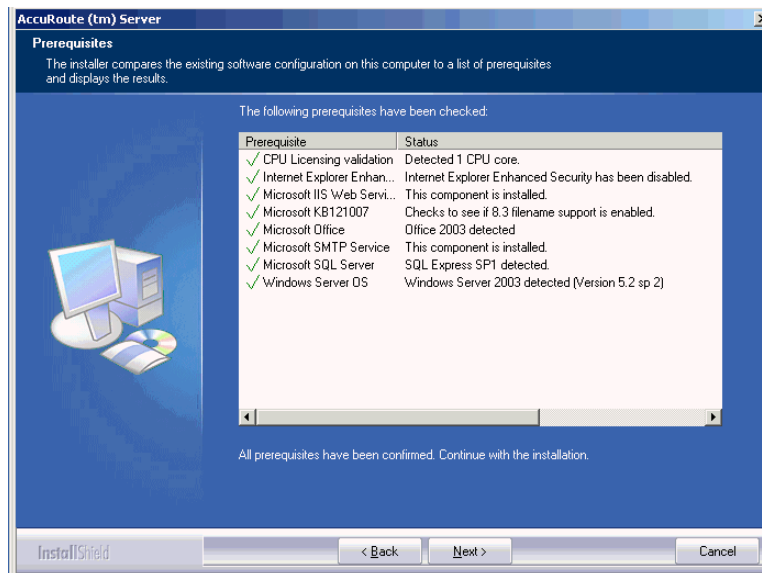
9   Review the results and perform one of the following listed actions.

Important   If Microsoft Office is partially detected by the setup, exit the setup and verify that Office is configured for first-time use. Start an Office application, and if prompted, enter a user name and initials. Wait for a new document to open and then exit the Office application. If Microsoft Office is still only partially detected, verify that Word, Excel, and PowerPoint are installed and continue with the AccuRoute server installation.

‣   To exit the setup or to install components that are required for the installation, click **CANCEL** and then click **YES** to exit the setup.

‣   To continue with the installation, click **NEXT**. The setup requests logon credentials for the Omtool service account. By default, the **User Name** field is populated with the name of the user logged in to Windows.
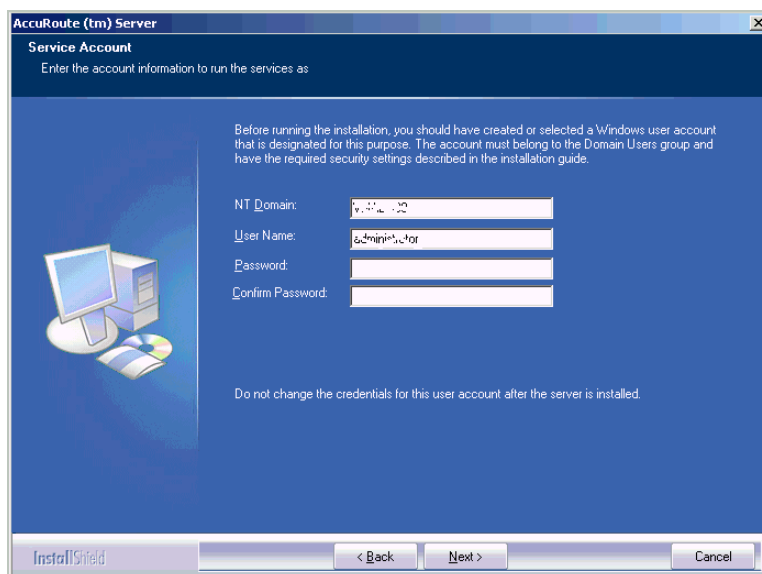
10   Provide the logon credentials of the Omtool service account.

a   In the **NT DOMAIN** field, enter the name of the Windows domain.

b   In the **USER NAME** field, enter the user name.

c   In the **PASSWORD** and **CONFIRM PASSWORD** fields, enter the password for the user.

d   Click **NEXT**. The setup validates the user account and then displays options for the message database.
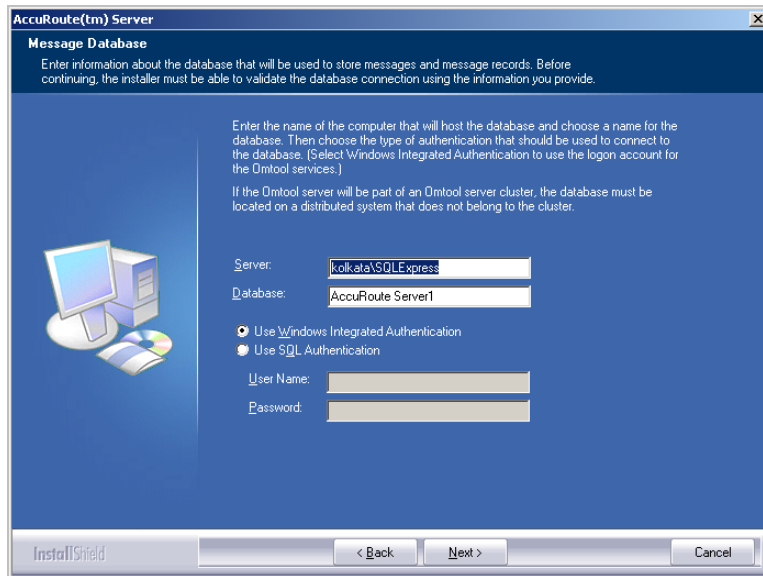
11   Complete the database configuration:

When the setup detects **SQL Server 2005**, verify that the **SERVER** field is populated with the name of the server running the Microsoft SQL Server database application. Then manually add the name of the SQL instance after the server name. For example: `Servername\SQLInstanceName`. Otherwise you will get the following error: `Failed to validate SQL connection information`.

Note   The default value is the local server where the setup is running.

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a   In the **Database** field, review the name of the message database name and modify it if necessary.

Note   During installation, the database is created on the AccuRoute server in **...\OMTOOL\OMTOOL SERVER\DATABASE**.

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b   Select the authentication method that the Omtool services use to access the database. Choose one of the following:

▸   **USE WINDOWS INTEGRATED AUTHENTICATION** to use the Omtool service account. This is the default.

▸   **USE SQL AUTHENTICATION** to use SQL Server authentication. If you select this option, enter the logon credentials in the **User Name** and **Password** fields.

12 Click **NEXT**. The **ObjectArchive Workspace** page opens.
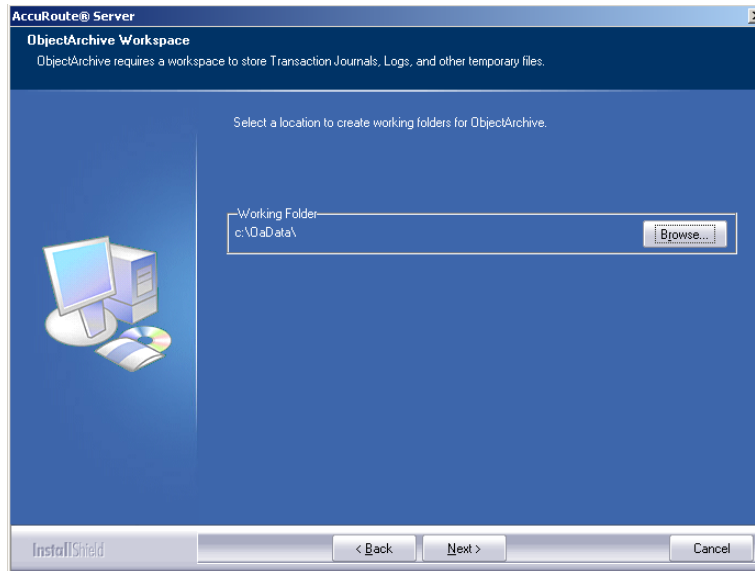
13 Keep the default location of **C:\OADATA** and click **NEXT**. See also Note about installing ObjectArchive.

14 The setup validates the connection to the database and displays installation settings.
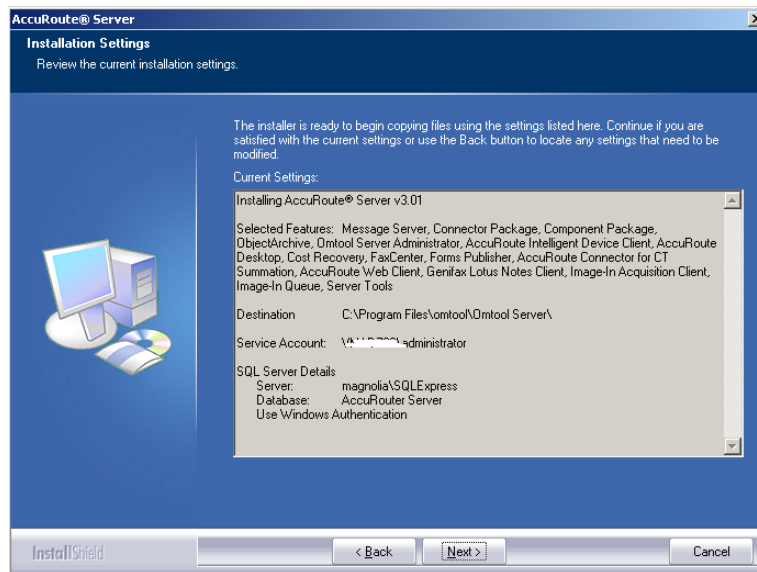
15 Review the installation settings.

16   Click **NEXT** to proceed with the installation.
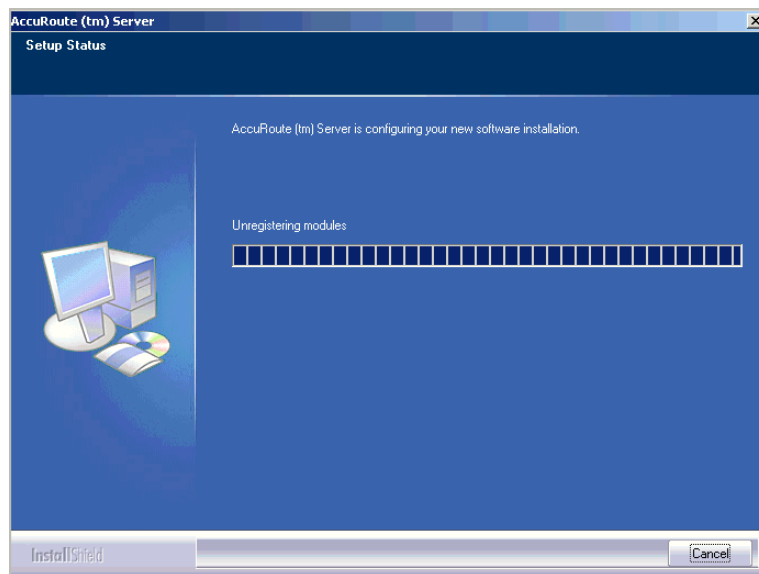
When installation is complete, the setup displays the following message.
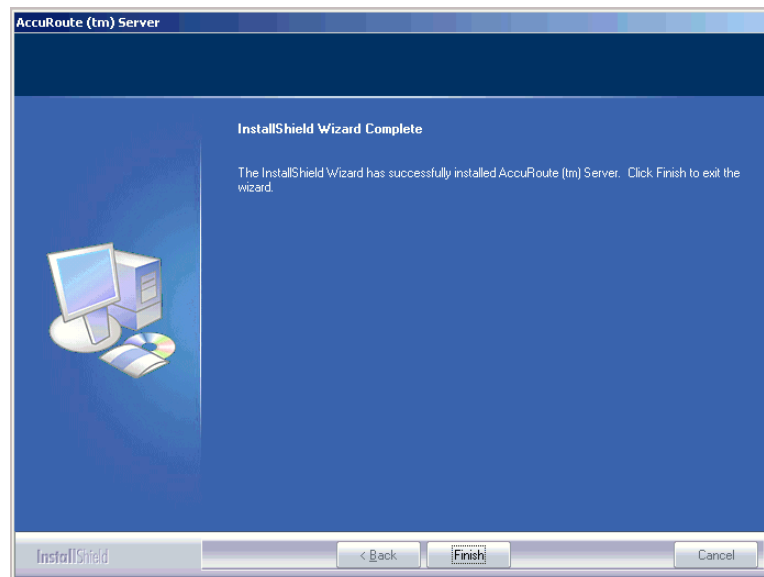
17   Click **FINISH**. The setup launches the server configuration wizard.

18   Continue to Configuring the server configuration wizard.

Configuring the server configuration wizard

After the AccuRoute server is installed, the server configuration wizard launches automatically. The server configuration wizard must be completed before the Omtool Server Administrator can be started.

To complete the server configuration wizard:

1   Verify that the server configuration wizard has opened and is showing a welcome message.

Important   When setting up the passive server in an AccuRoute server cluster, exit the server configuration wizard and click
              NO when prompted to run the wizard again when Omtool Server Administrator starts.

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2   Click **NEXT**. You see the server configuration completed message.
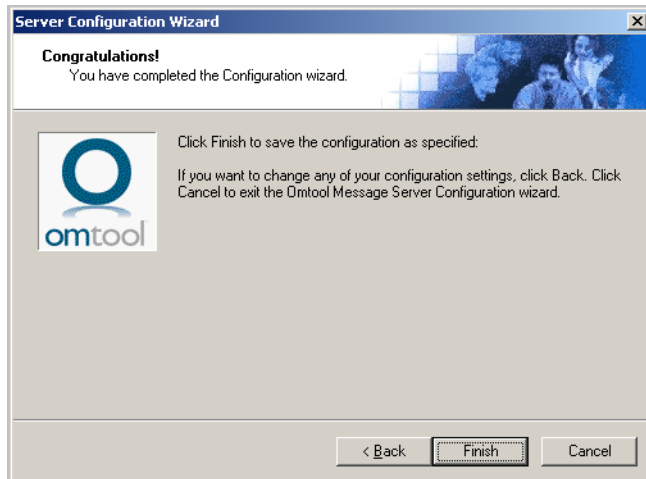
3   Click **FINISH** to close the wizard.

     The server configuration wizard saves the configuration and starts Omtool Server Administrator.
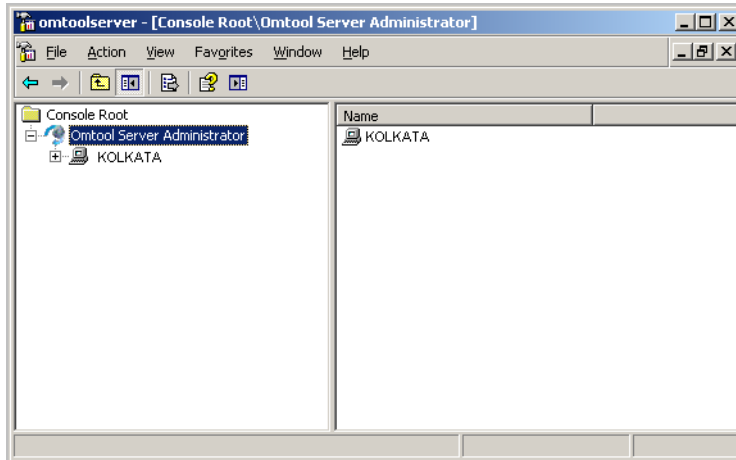
When Omtool Server Administrator is closed, Microsoft Management Console displays a message about saving changes to the MSC file. This file records the current position of items in the console tree. To preserve the console state, save the changes.

If prompted to update the MSC file, click **YES**.

Note about installing ObjectArchive

When installing ObjectArchive, you are prompted to specify the OaData folder (by default, it is C:\OaData). Specifying a UNC path for the OaData folder is not supported since it could lead to data loss.

Note	This folder should always be a local drive as it maintains journals of events like network failure etc.

Installing the AccuRoute v3.01 Healthcare Update

This section includes:

Instructions for downloading the Update

To download the Accuroute v3.01 Healthcare Update:

1   Open Internet Explorer browser and go to http://www.omtool.com/support.

2   Log in using your customer number.

3   Locate the module A**ccuRoute v3.01 Healthcare Update** in the **DOWNLOADS & DOCS** section.

4   Download the module and save it to a local drive.

5   Extract the files to a location on your AccuRoute server.

Installing AccuRoute v3.01 Healthcare Update

To install the Update:

1   Log in to the AccurRoute Server system using the credentials of an Administrator.

2   Go to the location where you saved `ARS3.01-HealthcareServer.exe` file.

3   Double click the executable. The **AccuRoute Extensions for Healthcare** page opens prompting
     you to extract and install the update.
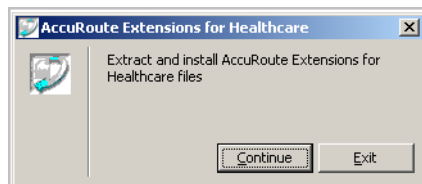
4   Click **CONTINUE** to extract the files to a temporary location on your system. When extraction is
     complete, the **AccuRoute Extenstions for Healthcare** page opens.
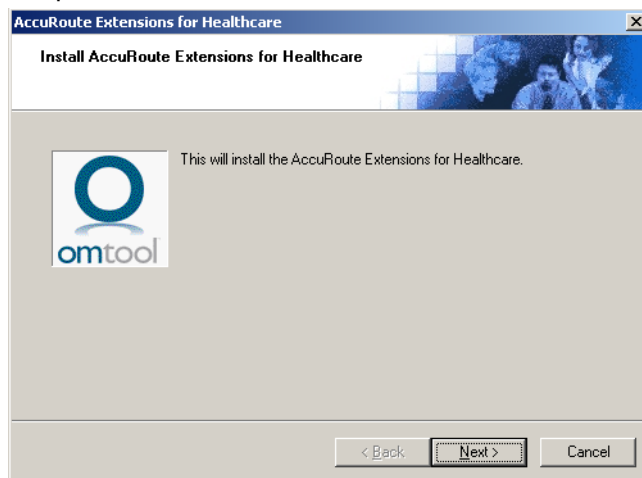
5   Click **NEXT**. The **Detect Components** page opens listing the component that will be updated.
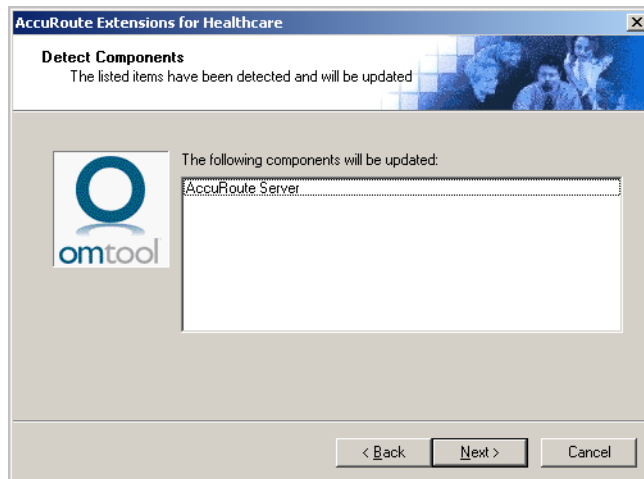
6 Click **NEXT** to install the update.

7 A progress bar shows the status of the installation. When installation is complete you see the **Installation Completed** page.
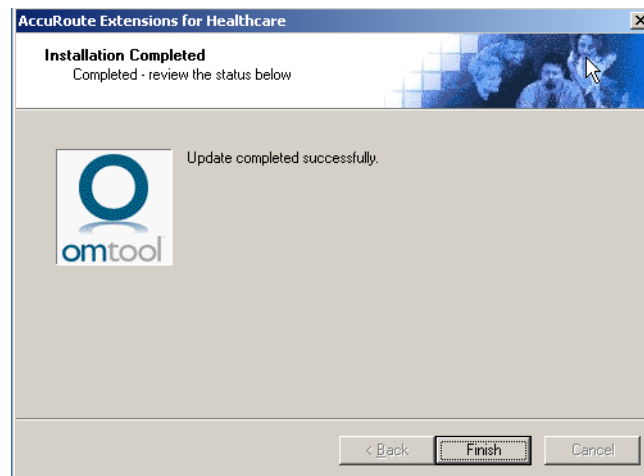
8 Click **FINISH** to exit the wizard.

Section 4: Configuring AccuRoute Server

This section contains instructions on how to configure the AccuRoute Server for the VIP release environment.

Creating Registered user

For information on creating registered user, consult the Omtool Server Administrator Help, topic: Registering a new user.

Adding the AccuRoute Web Client URL to the Server Admin

Add the AccuRoute Web Client URL to the Omtool Server Administrator following the instructions below. Once you add the link, email notification messages for deficiency recipients generated by IIQ operators will contain a link to access the deficiency using AccuRoute Web Client.

To add the AccuRoute Web Client URL:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Right click Server name and select Properties from the drop down menu.

4   Click Settings to open the Settings page.

5   In the Web Client section, go to the URL text box and enter the AccuRoute Web Client url: `http:/` `/ServerName/OmtoolARWeb` where the ServerName is the name of the AccuRoute server.
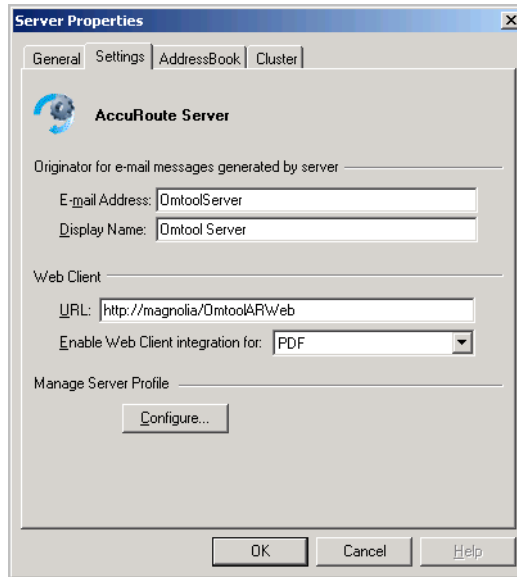
6   Click **OK** to save your changes.

Enabling the Image-In Queue component

You must enable the Image-In Queue component, before it can process jobs submitted to the Image In Queue application and route them to the AccuRoute server for routing. Obtain a valid license key to enable the component before proceeding with the instructions below.

To enable the IIQ component:

7   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

8   In the console tree, expand the AccuRoute Server.

9   Click **COMPONENTS**. The details pane lists all the components in your AccuRoute environment.

10 Double click **Image-In-Queue** component to open the **Properties** page.
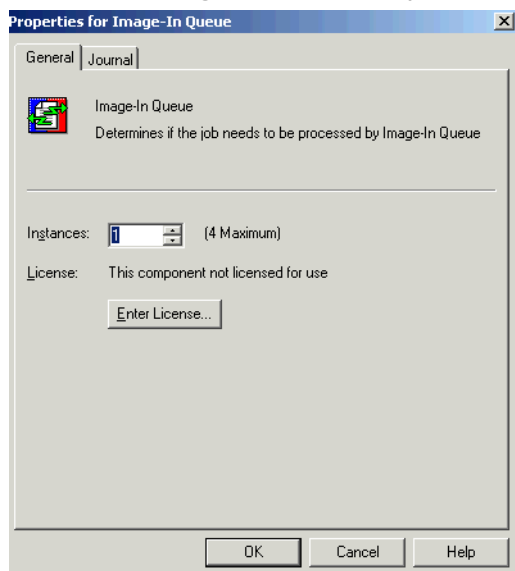
11 Click **ENTER LICENSE** to open the **License** page.

12 In the **LICENSE** text box, enter a valid license obtained from Omtool.

13 Click **OK** to enable the component.

Creating new AccuRoute connectors

This section includes:

Creating New AccuRoute connector for Filescan (4-3)

Creating and configuring Omtool Healthcare Suite Connector for MEDITECH (4-4)

Creating New AccuRoute connector for Filescan

You will need to create the New AccuRoute connector for Filescan for jobs coming from Image-In Acquisition client. These jobs are sent to Filescan for processing.

4-4
Section 4: Configuring AccuRoute Server

To create a New AccuRoute connector for Filescan:

1 Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR** to open the Omtool Server Administrator.

2 In the console tree, click **CONNECTORS > NEW > FILESCAN**. The **License** page opens.

3 Click **NEXT**. The **Server Address** page opens.

4 Click **NEXT**. Alternately, if you want the connector to run on a remote server, click Remote Server and enter the server name. Click **NEXT**. The **Display Name** page opens.

5 Enter a descriptive name and click **NEXT**.

6 You are prompted to choose the folder to scan.

7 Click **BROWSE**. Navigate and select the folder. You can select additional folders to scan after you have created and configured this connector.

Note   If the folder does not exist you must create it and share it on the network so that it is accessible from Image-In Acquisition client.

---

8 Click **NEXT**.

The connector is configured and added. The **Congratulations** page opens.

9 Click **FINISH**.

The new Filescan connector is listed in the details pane.

Creating and configuring Omtool Healthcare Suite Connector for MEDITECH

This section includes:

Adding Omtool Healthcare Suite Connector for MEDITECH (4-4)

Configuring Omtool Healthcare Suite Connector for MEDITECH (4-5)

Creating outbound rules for Omtool Healthcare Suite Connector for MEDITECH (4-5)

Adding Omtool Healthcare Suite Connector for MEDITECH

To add the Omtool Healthcare Suite Connector for MEDITECH:

1 Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2 In the console tree, expand the AccuRoute Server.

3 Right click **CONNECTORS** and select **NEW > MEDITECH**. The Create New MEDITECH Connector wizard opens.

4 Click **NEXT**. The **Display Name** page opens.

To install the connector on a remote system, click the Remote server option and enter the name or IP address of the remote system in the text box beside the Remote server option.

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5   In the **NAME** field, enter a descriptive name for the connector, the default being **MEDITECH on the Server**.

6   Click **NEXT** and then **FINISH** to close the wizard.

The Omtool Healthcare Suite Connector for MEDITECH is created and listed in the

Connector details pane.

Configuring Omtool Healthcare Suite Connector for MEDITECH

To configure Meditech connector:

1   Open the Meditech connector properties page and click **CONFIGURATION**.

   a   For the **DEFAULT DESTINATION** text box, verify the value to be **MEDITECH2OBJECTARCHIVE**.

   b   In the **LISTEN FOR REQUESTS FROM MEDITECH ON PORT** text box, verify the value is 3001.

2   Click Environments tab and then click Add to open the Environment Properties page.

   a   In the **NAME** text box, enter a descriptive name.

   b   Verify the **TYPE** is Magic (default).

   c   In the **SERVER** text box, enter the IP address of the Meditech server.

   d   In the **PORT** text box, use default port 3000.

   e   In the **SEGMENT** text box enter appropriate value.

   f   In the **DIRECTORY** text box enter appropriate value.

   g   In the **MIS** text box enter appropriate value.

   h   In the **ADMDB** text box enter appropriate value.

3   Click **DOCTOR LOOKUP** tab. Most fields are filled in by default. Verify all information.

   a   For **Logon**: change value to domain admin

   b   For **Attribute**: value is blank by default. Enter an attribute to search on.

4   Save your changes to the connector properties and close the Properties page.

Creating outbound rules for Omtool Healthcare Suite Connector for MEDITECH

To create the rule:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Right click **RULES > OUBOUND > NEW RULE**. The Create New Rule wizard opens.

4   Click **ADD**. The **Add Rule Criteria** list opens.

5   Select **DESTINATION IS AN EMAIL ADDRESS** and click **NEXT**.

6   In the **Items to Match** page, enter MEDITECH2OBJECTARCHIVE. Click **FINISH** then **NEXT**. The **Add Rule Action** page opens.

7   In the **Specify the Actions to take for this Rule** page, choose **ROUTE TO CONNECTOR**, click **NEXT**, the **Route to Connector** page opens.

8   From the **ROUTE TO CONNECTOR** drop down, select **OBJECTARCHIVE**.

9   For the **DOCUMENT DELIVERY FORMAT**, select **TIFF(IMAGES)** since Meditech uses TIFF images.

10   Click **FINISH**.

11   Click **NEXT** on the fail action page and then name the rule.

12   Save your changes and close open dialogs.

13   Save the rule.

Creating message properties

The following message properties are created when you install AccuRoute v3.01.

- ApprovalDate
- ApprovalEmail
- ApprovalType
- DEFICIENCYSTATUS
- DeliveredDocumentName
- DeliveredFormat
- JobIDText

- Originator
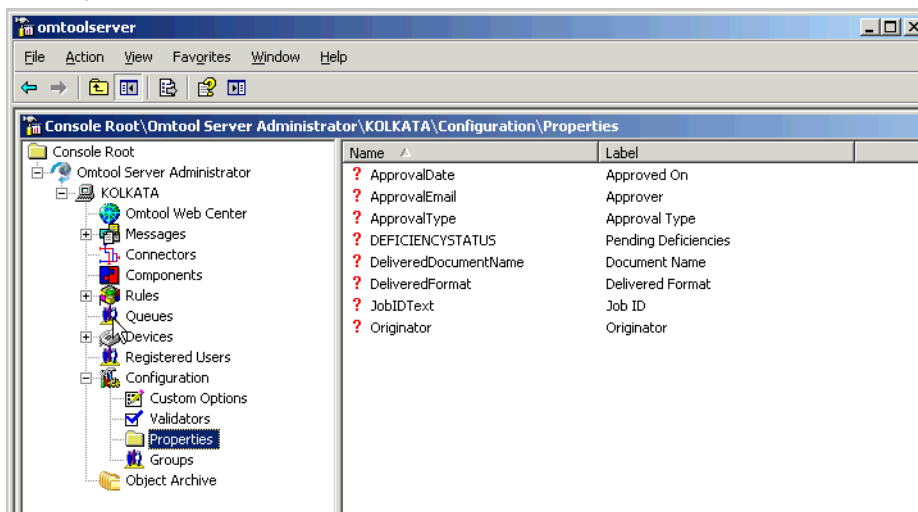
You must create the following message properties or metadata fields listed in the table below.

Table 4-A: **List of message properties**

Message property name	Custom DMS name
• Account Number	• AccountNum
• Medical Record	• MedicalRecord
• Patient Name	• PatientName
• Form ID	• FormID
• External Key	• ExternalKey
• Folder ID	• FolderID
• Scan Date	• ScanDate

When creating these message properties, observe the following rules:

- All Metadata fields should be configured as DMS Custom mappings.

- `Account Number` and `Medical Record` should use the appropriate Validators.

- `Form ID` may validate against an Items List or an external database table

To create a message property:

1 Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2 In the console tree, expand the AccuRoute Server.

**3**   Expand **CONFIGURATION** then, right click **PROPERTIES**. From the drop down menu, select **NEW >**
PROPERTY DICTIONARY. The **Property Dictionary Item** page opens.

4   In the **NAME** text box, enter the metadata field name.

5   In the **LABEL** text box, enter a suitable label.

6   In the **INSTRUCTIONS** text box, enter an appropriate instruction on what information should be
entered for this field. For example, for "Client" metadata field, you can create the following
instruction: "Enter the Client name:".

7   Verify that the **TYPE** is set to **TEXT**.

8   In the **Mappings** section, click **NEW** to open the **Property Definition** page.

9   Select **DMS CUSTOM FIELD** option and enter the corresponding metadata field name as defined in
the DMS repository and in the table above.

10   Click **OK** to close the **Property Definition** page. The value you entered is listed in the **Mappings** text box.
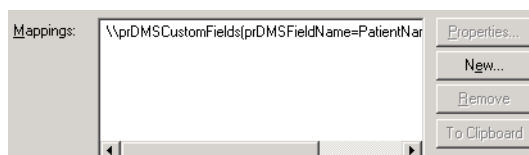
11   Click **OK** to create the message property. It is listed in the **Properties** details pane.

Configuring Regular Expressions

Configure Regular Expressions for known barcode formats. The advantage of using Regular Expressions is that it eliminates Omtool's need for writing code for the third party vendors.

To configure a Regular Expression:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Expand **CONFIGURATION** then select **PROPERTIES**. All available properties ar listed in the details pane.

4   Select the property item you want to configure for Regular Expressions.

5   In the General tab of the Properties page, go to the In the **Automatic Assignment (Barcode Detection Component)** section.

6   In the **REGULAR EXPRESSIONS** text box enter the Regular Expression for their barcode.

For example, the formats for message properties of a particular healthcare system used for internal testing only are as follows:

❍   MedicalRecord: ^M\d{9}

❍   AccountNum: ^V\D\d{9}

❍   FormID: .{7}

7   Save your changes.

Configuring Object Archive server

When you install Accuroute v3.01, it creates a local Object Archive database and connects to it by default. This is listed as Active under the Object Archive node of the Omtool Server Administrator.

This section includes:

Creating a Volume List

When integrating with a Meditech system, crate a Volume List named MeditechReports using the instructions below.

To create a new volume list:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Right click **OBJECT ARCHIVE** and select **NEW > VOLUME LIST** from the drop down menu. The **New Volume List** page opens.
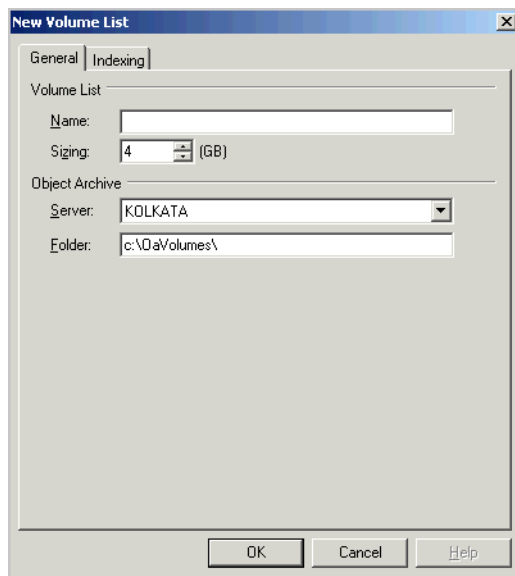
4   In the **NAME** text box, enter the name **MEDITECHREPORT**.

5   In the **FOLDER** text box, the path to the list is listed as by default to be **C:\OAVOLUMES**.

Note   By default 4 GB is allocated for OaVolumes. If the space is less than 4 GB, messages will fail. You can manually configure the value to be greater or equal to 4GB for space issues.

6   Next, click **INDEXING** tab to open the **Indexing** page.

7 In the **Properties to Index** section, click **ADD** to open the **Index Properties** page.
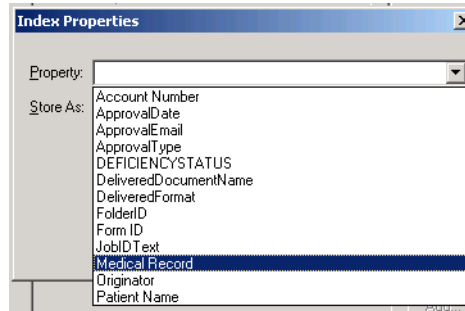
8 Select **EXTERNAL KEY** from the list of available message properties.

9 Click **OK** to close the **Index Properties** page.

10 Click **OK** to close the **New Volume List** page.

Updating the Active Volume List

The **Active** Volume List is created when you install Object Archive as part of the AccuRoute v3.01 Server. After you have added the properties to index in the **Meditech Report** Volume List you created in Creating a Volume List, you must update the Active Volume List with the same properties to index.

To update the Active Volume List

1 Double click **ACTIVE** and to open the properties page.

2 Click **INDEXING** tab to open the **Indexing** page.

3 In the **Properties to Index** section, click **ADD** to open the **Index Properties** page.

4 Select from the **PROPERTY** drop box the same message property (External Key) that you chose for MeditechReports.

5 Click **OK** to close the **Index Properties** page.

6 Click **OK** to close the **Active** page.

Creating the Object Archive DMS connector

To create the Object Archive DMS connector:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Right click **CONNECTORS** and select **NEW > DMS CONNECTOR**. The **License** page opens.

4   In the **LICENSE** text box, enter a valid license key.

5   Click **NEXT**. The **Server Address** page opens.

6   Click **NEXT**. The **Display Name** page opens.

7   In the **NAME** text box, enter **OBJECT ARCHIVE**.

8   Click **NEXT**. The **DMS Type** page opens.

9   Select **T2 - OBJECTARCHIVE** from the drop down list.

10 Click **NEXT**. The **ObjectArchiveServer** page opens showing the Volume Lists you defined in Creating a Volume List.

11 Select **Meditech Report** from the list and click **FINISH**.

DMS configuration is now complete and the Object Archive DMS connector in now listed in the Connectors details pane. Users can now use this connector to route documents for archiving.

Creating Queues

AccuRoute Server Queues are related to the use of the Image-In Queue desktop clients in processing scan jobs. The queue workflow is a series of destinations that a scanned document reports makes while it is in the archiving process. This process is managed within the Image-In Queue client, but still gives users the option of adding specific data to the document to ensure that the correct values are associated with the archived document.

You can create multiple Queues to divide a document workflow into logical groups. A Queue can have its own column headings and separate editable fields. These fields must be selected on the basis of the Queue and the destination for the documents in the Queue.

Note   If you intend to use server-based validation, you must create the validations before you create the queues.

To create a queue:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Right click **QUEUES** and select **NEW > QUEUE**.

The **QUEUE PROPERTIES** page opens.
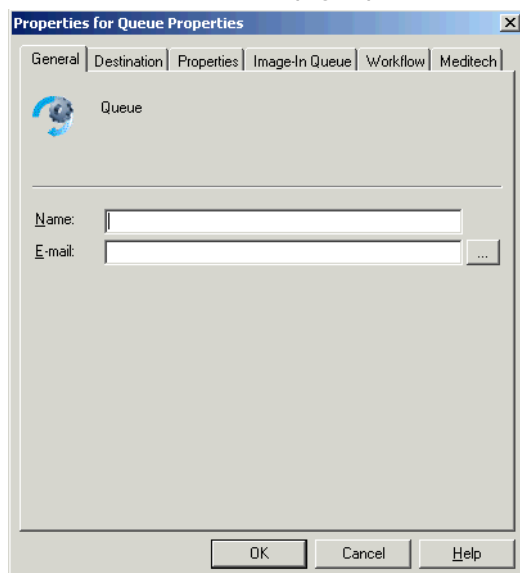
4   In the **NAME** field, enter a descriptive name for the Queue, for example Clinical.

5   In the **E-MAIL** field, enter an email address for the person who will manage the queue.

6   Click **DESTINATION** to open the Destination page.

    a   Select **ROUTE TO** option and from the drop down list, select **OBJECTARCHIVE VIA [OBJECT ARCHIVE DMS CONNECTOR NAME]** option.

    b   Click **CONFIGURE** to open the **Profile into ObjectArchive** page.

    c   Leave the **FROM** drop down empty. Click **OK** to close the page.

    d   Verify the box beside the **INCLUDE TEMPLATE** option is checked and that the template selected is **OMNOTIFICATION-IIQ-RS.OMTPL** file.

7   Click the **PROPERTIES** tab to open Queue property page.

a   In the **Specify the required properties for this queue** section, click **ADD**. The **Required Meta-Data Properties** page opens.
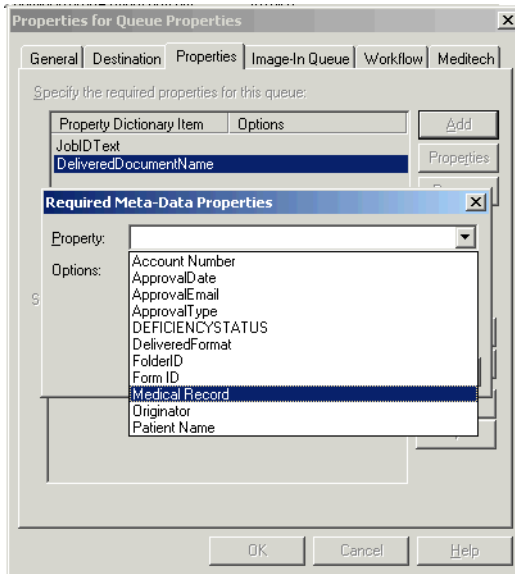
b   From the **PROPERTY** drop down select properties like `MedicalRecord`, `AccountNum` and `FormID`.

c   Check the box beside Include in **Meta-Data Deficiencies** option as needed. (This should be checked if Web users are to see the meta-data properties from the AccuRoute Web Client.)
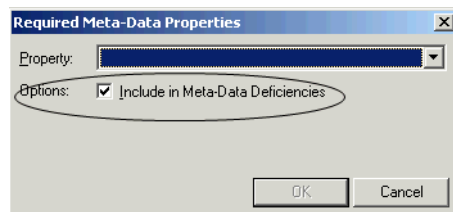
d   Click **OK** to close the **Required Meta-Data Properties** page. The property is now listed in the **Specify the required properties for this queue** section

e   In the **Specify the properties to display in listings for this queue** section, click **ADD** to open the **Select Property Dictionary Field** page.

f   Select properties to display in the Image-in Queue client like `MedicalRecord`, `AccountNum` and `FormID`.

g   Click **OK**. The property is now listed in the **Specify the properties to display in listings for this queue** section.

8   Click **IMAGE-IN QUEUE** to open the **Image-In Queue** page.

9   In the **Folder Grouping** section, click **ADD**.

10   Add grouping for message properties like `MedicalRecord`, `AccountNum` and `FormID`.

11   Click **WORKFLOW** tab to open the **Workflow** page.

12   Create two workflow rules following instructions in Configuring Queue Workflow rules.

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13   Click Meditech to open Meditech page.

14   Check the box beside **ENABLE DEFICIENCY NOTIFICATIONS ON MEDITECH**.

15   From the **CONNECTOR** dropdown, select **MEDITECH ON THE SERVER**.

Note   The Meditech connector needs to be installed in order for this to be present. See <u>Creating and configuring</u>
                            <u>Omtool Healthcare Suite Connector for MEDITECH</u> (4-4).

16   For the **ENVIRONMENT**, choose the environment that was created when configuring the Meditech
         connector.

Note   The Meditech connector needs to be installed and configured in order for this to be present. See <u>Creating and</u>
                            <u>configuring Omtool Healthcare Suite Connector for MEDITECH</u> (4-4).

17   Click **OK** to create the Queue.

Configuring Queue Workflow rules

Create the following queue workflows following the instructions below.

Workflow rule 1

1   Click **ADD** to add a workflow. The **Queue Workflow Rules Properties** page opens.

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2   In the **DESCRIPTION** text box, enter **MANUAL RELEASE**.

3   Click **ADD** beside the **Criteria** text box, to open the **Add Workflow Criteria** page.

4   Select **RELEASED BY THE IMAGE-IN QUEUE OPERATOR**.
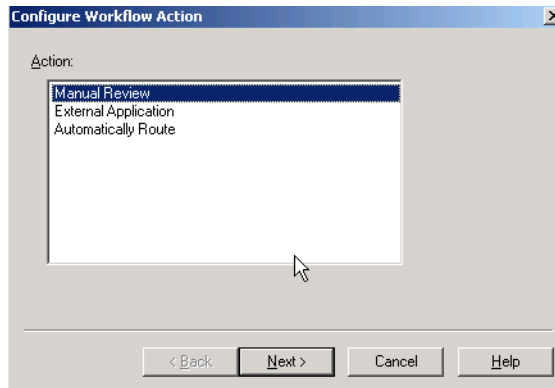

5   Click **NEXT**.

6   For **The job** option, select **IS** and for the **Released By** option verify **ANYONE** is selected.

7   Click **FINISH** to close the **Add Workflow Criteria** page.

8   Click **CONFIGURE** to open the **Configure Workflow Action** page.

9   In the **Action** area, select **MANUAL REIVIEW**. Selecting this option will route the documents to the
        Queue's default destination.

10   Click **NEXT** and then click **FINISH**. Configuring the rule is complete.

11   Click **OK** to close the **Queue Workflow Rules Properties** page.

Workflow rule 2

1   Click **ADD** to add a workflow. The **Queue Workflow Rules Properties** page opens.

2   In the **DESCRIPTION** text box, enter **AUTOMATICALLY RELEASED**.

3   Click **ADD** beside the **Criteria** text box, to open the **Add Workflow Criteria** page

4   Select **PROPERTY DICTIONARY ITEM** and click **NEXT**.

5   From the **PROPERTY** drop down list select **ACCOUNTNUM**, select **IS VALID** option. Then click
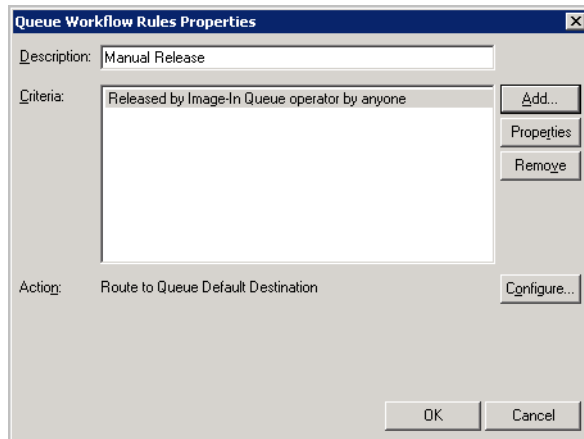   **FINISH** to close the **Add Workflow Criteria** page.

6   Click **CONFIGURE** to open the **Configure Workflow Action** page.

7   In the **Action** area, select **AUTOMATICALLY ROUTE**.

        Configuring the rule is complete.

        Click **OK** to close the **Queue Workflow Rules Properties** page.

Configuring Groups

This section includes:

Creating a Group

The group Default is automatically created when you install AccuRoute v3.01. All users in the Domain Users group in the Active Directory are members of this group.

Use the instructions below to create your desired group.

To create a Group:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Expand **CONFIGURATION** and select **GROUPS** from the drop down menu.

4   Right click Groups and select **NEW > GROUP**.

5   In the details pane, right click and select **NEW > GROUP** from the drop down options.

6   In the **NAME** text box, you must enter a name for the group.

7   In the **DESCRIPTION** text box, optionally enter a brief description of the group.

8   Click **MEMBERS** option to open the **Members** page.

9   Click **ADD** and enter a name or some letters of a predefined group in the Active Directory, for example Domain Admins. This name is to be associated with the permissions in the group you are creating.

10   Click **CHECK NAMES** to see a list of predefined names in the Active Directory that matches the name criteria you entered.

11   Select the group name you want from the list and click **FINISH** to close the **Add group** page.

12   Click **OK** to save the configuration settings. The group is created and listed in the details pane.

Adding Image-In Queue permissions to a Group

Add the Image-In Queue permission to the desired Group following the instructions below.

To configure a Group:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Expand **CONFIGURATION** and select **GROUPS** from the drop down menu.

4   Double click your desired Group to open the **PROPERTIES** page.

5   Click the **IMAGE-IN QUEUE** tab to open the Image-In Queue properties.

6   Check the box beside **ENABLE MEMBERS OF THIS GROUP AS AN IMAGE-IN QUEUE OPERATORS** option.

7   For atypical Healthcare Installation setting, choose all permissions listed.

All permissions except **ALLOW DOCUMENTS TO BE SPLIT**, **ALLOW INCOMPLETE DOCUMENTS TO BE RELEASED** and **ALLOW WORKFLOW LOCKS TO BE MANUALLY RELEASED** are selected by default. The permission **OPERATOR MUST VIEW ALL DOCUMENT OAGES BEFORE COMPLETING** is not implemented at this time.

Note   When an user logs into Image-In Queue as a member of a group, the user has all the permissions you select in this step.

The table below lists all permissions and a brief explanation of each of the permissions.

Table 5. List of permissions that can be allowed for an Image-In Queue Group

Permission	Explanation
Allow data to be edited	Will allow editing of required document metadata. For example, if a metadata field requires validation the user can fill in the required value for validation.
Allow document to be annotated	Not a valid option.

Table 5. List of permissions that can be allowed for an Image-In Queue Group

Permission	Explanation
Allow documents to be deleted	Will allow user group to delete processed documents. Documents must be moved into the processed queue first before they can be deleted.
Allow documents to be merged	Will allow Image-In Queue operator to merge multiple documents to create a new document. When you merge multiple documents, the originals automatically move to the processed queue. Merging of documents is useful if a device user failed to scan all pages of a document and the electronic copy has missing pages. In this case, the pages he forgot to scan can be scanned separately and then merged to form the complete electronic document.
Allow documents to be released	Will allow Image-In Queue operator to release a document. Releasing a document is similar to routing it to an Object Archive database. A document can be released only after all the required properties have been validated and if the document has a specified destination. Also, documents that are in deficiency cannot be released. If no default destination is specified, the Release option in Image-In Queue client will be disabled.
Allow documents to be routed	Not a valid option.
Allow documents to be saved to a DMS	Not a valid option.
Allow documents to be split	Will allow Image-In Queue operator to split a single document into two separate documents. To split a document, multi select the pages that should be in the first document and then right click and select split. The pages you selected becomes the first document and the rest of the pages in the original document combine to become the second document. The original document that you split moves to the processed queue.
Allow documents to be saved locally	Will allow the document to be saved to the local system or to the network.
Allow incomplete documents to be moved to processed	Will allow incomplete documents to move to the processed queue. This is useful in situations where you have documents with invalid scan or where the documents should not be routed to the Object Archive server.
Allow incomplete documents to be released	Will allow incomplete documents to move to a default selected location, for example Object Archive database.
Allow management of deficiencies	Will allow mapping to and management of deficiency properties. When the Image-In Queue operator assigns a deficiency to a document, he has to provide the email of the user who will address the deficiency. (This user whose email is assigned must be a member of the group the queue is assigned to).
Allow printing of documents	Will allow documents to be printed to a network printer.
Allow workflow to be manually released	Will allow the Image-In Queue operator to manually release documents in a workflow. When a document needs vouchering, it is sent to the External Application for processing. When the Elite operator processes the document, it is locked in Image-In Queue so that no one can operate on it and thus maintain data integrity. If the lock is not automatically released after the Elite operator has finished processing the document, this permission will allow the Image-In Queue operator to manually release the lock
Operator must view all document pages before completing	Not a valid option.

8   Click **OK** to save your selection.

Configuring access to Volume Lists

To give the group access to Volume Lists:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Expand **CONFIGURATION** and select **GROUPS** from the drop down menu.

4   Double click your desired Group to open the **PROPERTIES** page.

5   Click the **VOLUME LISTS** tab to open the Volume Lists properties.

6   Check the box beside the **ENABLE SEARCHING THE FOLLOWING VOLUME LISTS FOR MEMBERS OF THIS GROUP** option.

7   Check the Volume List **Medical Record** and **Active** from the list displayed. The volume list search is for the web archive search feature and determine the queue that is available for the web users to search in for their imported documents.

8   Click **OK** to save your changes.

Configuring Queue Access

To give the Queue Access to Volume Lists:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Expand **CONFIGURATION** and select **GROUPS** from the drop down menu.

4   Double click your desired Group to open the **PROPERTIES** page.

5   Click the **QUEUE ACCESS** tab to open the Queue Access properties.

6   Check the box beside the **ENABLE MEMBERS OF THIS GROUP TO ACCESS THE FOLLOWING QUEUES** option.

7   Select the Queue **Clinical** from the list displayed.

8   Click **OK** to save your changes.

Creating outbound rules for Image-In Queue

To create the rule:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Right click **RULES > OUBOUND > NEW RULE**. The Create New Rule wizard opens.

4   Click **ADD**. The **Add Rule Criteria** list opens.

5   Select **DESTINATION IS IMAGE-IN QUEUE** and click **NEXT**.

6   In the **Items to Match** page, enter `Where Destination is Image-In Queue IS`. Click **FINISH** then **NEXT**.

7   In the **Specify the Actions to take for this Rule** page, click **ADD**.

8   In the **Add Rule Action** page, select **ROUTE TO IMAGE-IN QUEUE** and click **NEXT**.
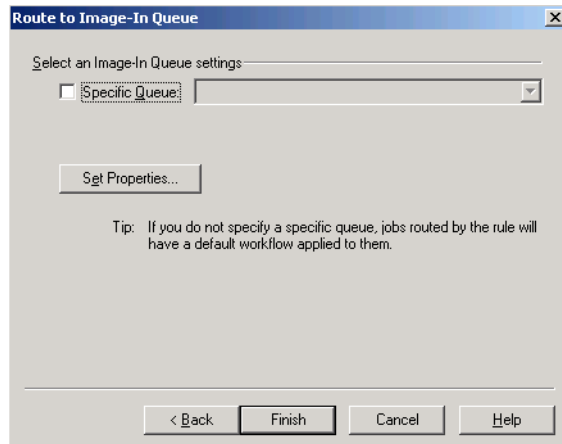
9   Check the box beside Specific Queue and select the Queue you created in Creating Queues.

10   Click **SET PROPERTIES**. The **DMS Rule Properties** page opens.

11   Select **CORE PROPERTIES** and then click **ADD**.

12   In the **NAME** text box, add name `prDataExtraction` and in **VALUE** text box, add 3. This is the value set for routing barcodes to IIQ.

13   Save your changes and close open dialogs.

14   Save the rule.

Configuring Server Validation

Important   This is an optional configuration depending on customer specific needs.

In a typical healthcare configuration, the following validators may need to be set up.
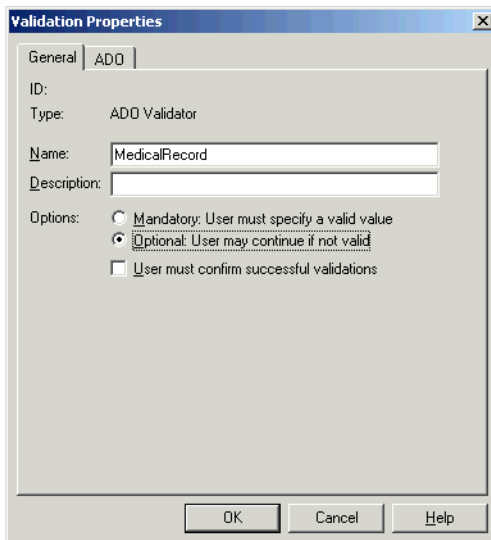
- MedicalRecord
- Account

Each of these validators refer to database tables maintained within the SQL Server that the Print Queue Monitor Service manages.

To set up validation:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR**.

2   In the console tree, expand the AccuRoute Server.

3   Select **CONFIGURATION** and then right click **VALIDATORS**. From the drop down menu, select **NEW > VALIDATOR**.

4   The **Select Validation Typ**e page opens. Select **ADO VALIDATOR** from the **Type** drop down list.
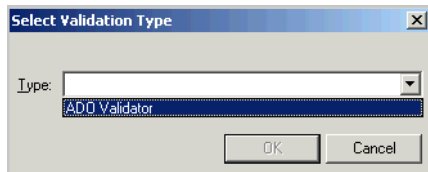
**5**   Click **OK**. The **Validation Properties** page opens.

6   In the **NAME** text box, you must enter the name like **MedicalRecord** or **Account**.

7   In the **DESCRIPTION** text box, you must enter a brief description.

Note   You cannot continue with creating the validator unless you specify the name and provide a description of the validator.

---

8   Verify that the **MANDATORY: USER MUST SPECIFY A VALUE** option is not selected. Also that the check box beside the **USER MUST CONFIRM SUCCESSFUL VALIDATIONS** is not selected.

9   Click the **ADO** option.

10   In the **DSN** text box, enter the following string: `Driver={Sql Server}; Server=[your SQL server name]; Database = [AccuRoute Healthcare database name]; User ID=""; Password="";`

11   In the **QUERY** text box, enter the following string: `select [name] from [name table]`
      `where [name] = '%name%`.

      For example, for the **MedicalRecord** field, you will enter: `Select AssignedPatientID from`
      `PatientIDs where AssignedPatientID = %MedRecNumber%` and for the **Account**
      field, you will enter: `Select v.AssignedPatientVisitID FROM PatientVisits v,`
      `PatientIDs m WHERE v.Patient=m.Patient and v.AssignedPatientVisitID =`
      `'%AccountNumber%' and m.AssignedPatientID='%MedRecNumber%`.

```
Validation Properties                                          [X]

 General   ADO

 DSN:    Driver={Sql Server}; Server=magnolia\SQLExpress;
         Database = AccuRoute Server; User ID="";
         Password="";


 Query:  Select AssignedPatientID from PatientIDs where
         AssignedPatientID = %MedRecNumber%




                                                  Test


                 OK          Cancel         Help
```
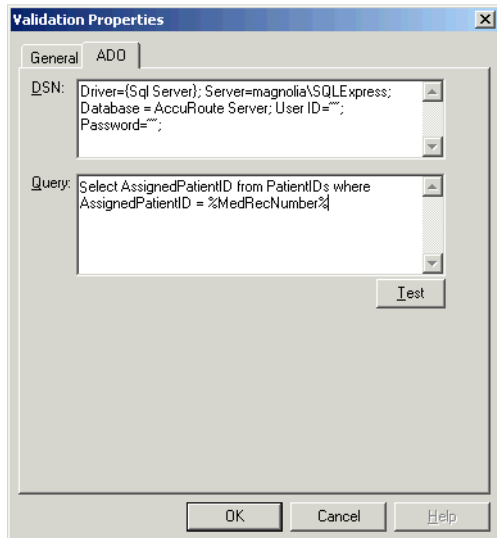
12   Click **TEST** to open the Test Validation page. Verify a valid record for the table you are attempting to
      validate against.

13   Click **OK** to create the validator.

omtool

Section 5: Installing Image-In Business Server

This section includes:

Before you can start using the Healthcare component, you need to set up the Image-In Business server and its clients. The Image-In Business Server must be installed on the same system running the AccuRoute Server. The client pieces must be installed on separate client systems and then run from there.

Requirements

The Image-In Business Server is installed on the same system running the AccuRoute Server. It has the following requirements:

❒   Non - virtual Filescan connector

❒   Shared folder for the Filescan connector containing a control file stating how jobs will be submitted to the Accuroute Server for routing.

For information on how to create Filescan connector, see Adding a Filescan connector. For information on how to create a Filescan folder, see Guidelines for creating a Filescan folder. For information on creating control files, see

Guidelines for creating control files.

Installing Image-In Business Server
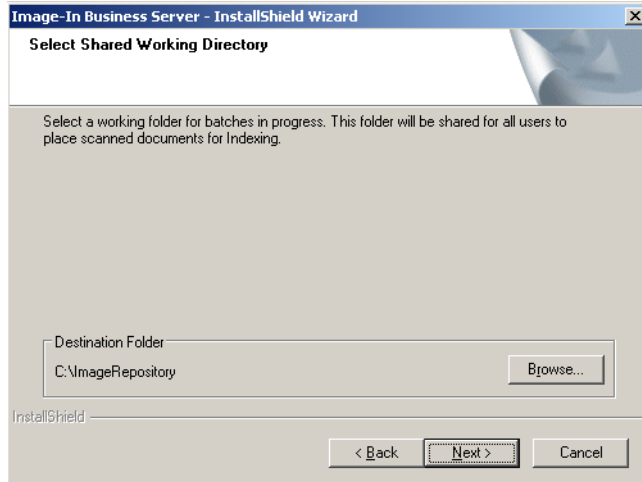
To install the Image-In Business Server:

1   Login to the system running your AccuRoute Server.

2   Navigate to the following directory:
C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\CLIENTS\IMAGE-IN BUSINESS.

3   Double click **SETUP.EXE**. The InstallShield wizard opens and configures your system for installation. When configuration is complete, you see the welcome message.
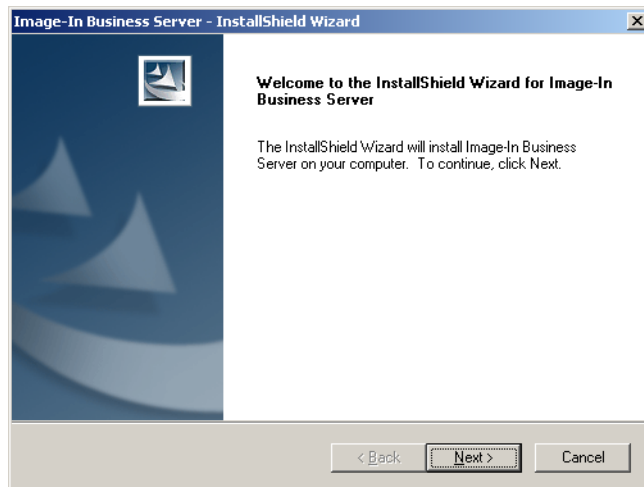
4   Click **NEXT**. The **Choose Destination Location** page opens. The default destination is
C:\PROGRAM FILES\OMTOOL\IMAGE-IN BUSINESS SERVER.
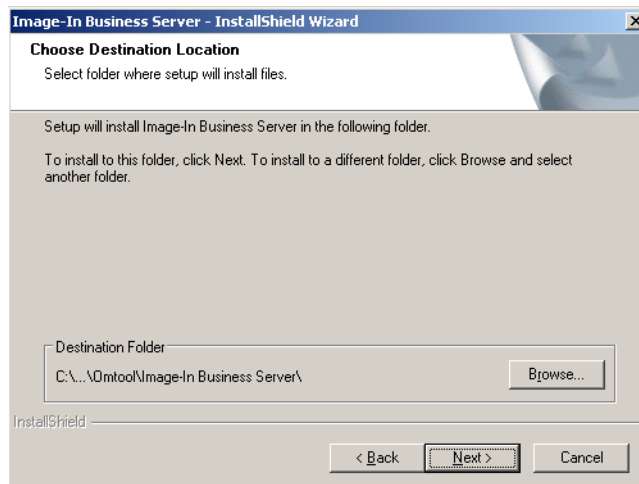
**5**   Click **NEXT**. The **Select Shared Working Directory** page opens.

The default location is **C:\IMAGEREPOSITORY**.

**6**   Click **NEXT**. The **Select AccuRoute Destination** page opens.

7   Click **BROWSE** and then select the **Filescan** folder you created prior to installing the Image-In Business Server. The **Database Server** page opens.

a   In the **Database server that you are installing to** section, expand the drop down option and select the database.

b   Keep Windows authentication configuration.

c   Keep the default database catalog name as ImageInBusiness.

8 Click **NEXT**. The **Ready to Install the Program** page opens.
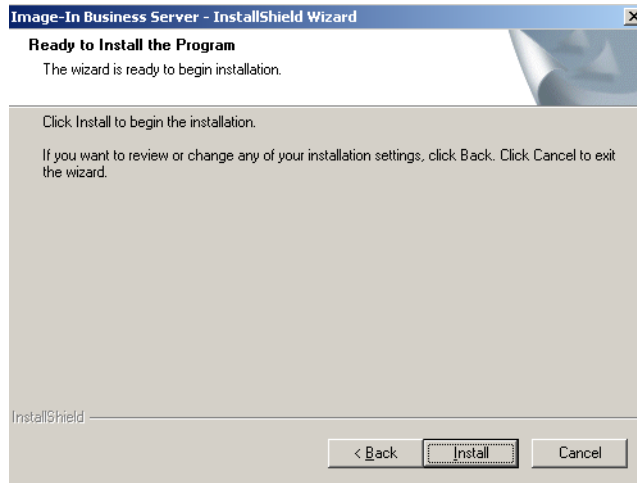
9 Click **INSTALL** to begin the installation. When installation is complete, you will see the **InstallShield Wizard Complete** page.
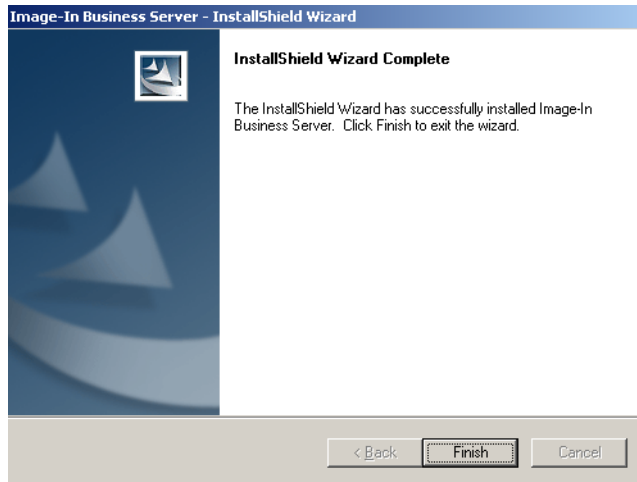
10 Click **FINISH** to close the wizard.

When you install Image-In Business Server, it also installs the setup files for the following client applications:

- Image-In Direct Capture
- Image-In Business Document Capturing and Archiving System

The client setup files are located in the **C:\PROGRAM FILES\OMTOOL\IMAGE-IN BUSINESS SERVER\CLIENT** directory.

Note You must share this folder so that the setup files are accessible from the clients systems.