
LegalKEY update for AccuRoute v2.3 installation and integration guide

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Section I: Introduction

This guide contains instructions on installing and configuring LegalKEY Update for Accuroute v2.3. It is written for systems administrators with detailed knowledge of the Omtool server and LegalKEY.

This section includes:

- [Introduction](#) (I-1)
- [Installation components](#) (I-1)
- [Deployment summary](#) (I-2)
- [Release notes](#) (I-2)
- [Related documentation](#) (I-3)

Introduction

LegalKEY update for AccuRoute v2.3 includes the ability to route documents to the LegalKEY repository from both AccuRoute Desktop v2.2.3 and the LegalKEY Attorney Desktop client. This powerful integration allows users to send both soft copy and hard copy documents to LegalKEY quickly and easily. Best of all, there is no learning curve for the users—the integration uses LegalKEY’s native windows and are totally familiar to them.

For more information on profiling documents to LegalKEY from AccuRoute Desktop, go to [Section 6: Testing](#). For configuration instructions to use the Document Image Separator pages generated by the LegalKEY Attorney Desktop client, see [Appendix: Using LegalKEY Native Routing Sheet](#).

Installation components

The installation components include:

- applying the LegalKEY update on the AccuRoute v2.3 server

Note Omtool DMS Libraries v2.3 is included in the AccuRoute v2.3 installation. The instructions in this guide are applicable only if you are running Omtool Libraries v2.3

- copying the updated AccuRoute Desktop installation kit from the server to all client systems
- installing updated AccuRoute Desktop on all client systems

Deployment summary

To deploy LegalKEY update for Accuroute v2.3:

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

Release notes

Enhancements

This release includes the following enhancements:

- LegalKEY update for AccuRoute v2.3 has been qualified with AccuRoute Desktop v2.2.3.
- Support for LegalKEY Native Routing Sheet generated barcode detection has been added. The AccuRoute server can read and process Document Image Separator pages (which are LegalKEY Native Routing Sheet pages) generated by the LegalKEY Attorney Desktop client. They provide an alternate way for the AccuRoute server to route documents to the LegalKEY repository without using the AccuRoute Routing Sheets.
- LegalKEY update for AccuRoute v2.3 has updated server and client configuration UI for enhanced user experience.

Resolved issues

This release has issues resolved during laboratory testing.

Limitations

I5469 - When using a remote DMS connector, the documents are not separated according to barcode.

Related documentation

- AccuRoute v23 server installation guide - <http://www.omtool.com/documentation/AccuRoute/v23/Server/AccuRouteV23ServerInstallConfigureGuide.pdf>
- AccuRoute Desktop installation guide - <http://www.omtool.com/documentation/AccuRoute/v22/AccuRouteDesktop/AccuRouteDesktopV22InstallGuide.pdf>
- AccuRoute Desktop users guide - <http://www.omtool.com/documentation/AccuRoute/v22/AccuRouteDesktop/AccuRouteDesktopV22UserGuide.pdf>
- Sending a message to LegalKEY using AccuRoute Desktop - <http://www.omtool.com/documentation/dmslibraries/v23/LegalKEY/OmtoolDMSLibrariesV23LegalKEYQuickStartGuide.pdf>
- Administrator help - <http://www.omtool.com/documentation/omtoolserver/v36/admin/index.htm>

Section 2: Requirements

This section includes:

- [Server requirements](#) (2-1)
- [Supported LegalKEY versions](#) (2-1)
- [Client requirements](#) (2-2)
- [Additional requirements](#) (2-2)

Server requirements

The system where you will install the LegalKEY update for AccuRoute v2.3 must have:

- AccuRoute v2.3

Note Currently, the Omtool DMS Librariesv2.3 are only available with the AccuRoute v2.3 server and client installations. The Omtool DMS Librariesv2.3 will be available as a separate download in the future.

- AccuRoute Rollup Build 4 (this should be applied to the AccuRoute server prior to applying the AccuRoute LegalKEY Native Routing Sheet update)
- Barcode Extractor license - The Barcode Extractor component of the AccuRoute server must be enabled and functional. A valid license is needed to enable the component. For more information, contact [Omtool sales](#).

Note This is needed only if you will use LegalKEY Native Routing Sheet pages to route documents to the AccuRoute server.

- Tier 2 DMS connector license. To purchase the Tier 2 DMS connector license, contact [Omtool sales](#).

Supported LegalKEY versions

- LegalKEY v4.20

Client requirements

The client system must have:

- AccuRoute Desktop v2.2.3 (if you will use **AccuRoute Routing Sheet** pages).

After the LegalKEY update is applied on the AccuRoute v2.3 server, new AccuRoute Desktop setup files become available. You must reinstall the AccuRoute Desktop on all client systems using the new setup files. For more information, see [Installing AccuRoute Desktop on all client locations using the updated AccuRoute Desktop setup kit](#).

- LegalKEY Attorney Desktop client (if you will use **LegalKEY Native Routing Sheet** pages) - The client must be installed, configured and functional to all client workstations.

Note FaxCenter and Swiftwriter do not support LegalKEY.

Additional requirements

- Identifying LegalKEY pickup and drop folders - For more information, see [Identifying LegalKEY pickup and drop folders](#) (2-2)

Identifying LegalKEY pickup and drop folders

Before configuring the LegalKEY update for AccuRoute v2.3, identify the folders that are required to complete the configuration

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

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

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

AccuRoute pickup folder (required for AccuRoute Desktop configuration)

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

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

The following requirements apply to the AccuRoute Desktop pickup folder:

- The folder location must be represented by a UNC path (\\computer\folder) or a drive mapping (X:\folder\folder).
- All workstations running AccuRoute Desktop must be configured to use the same UNC path or drive mapping. Consider these examples:

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

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

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

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

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

Section 2: Requirements

Section 3: Installation

This section includes:

[Downloading LegalKEY update for AccuRoute v2.3](#) (3-1)

[Special instructions for clustered servers](#) (3-1)

[Installing LegalKEY update for AccuRoute v2.3](#) (3-2)

[Adding the LegalKEY connector](#) (3-4)

[Installing AccuRoute Desktop on all client locations using the updated AccuRoute Desktop setup kit](#) (3-7)

Note If you have an existing LegalKEY DMS connector, you must install the LegalKEY update for AccuRoute v2.3 and then re-configure the connector again. This is necessary because when you apply the LegalKEY update for AccuRoute v2.3, it will update the server.

Downloading LegalKEY update for AccuRoute v2.3

To download LegalKEY Update for AccuRoute v2.3

- 1 Go to <http://www.omtool.com/support>.
- 2 Log in using your customer number.
- 3 Locate the module 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.

Special instructions for clustered servers

If you are applying the update to AccuRoute servers in a cluster you must follow the steps outlined below:

To apply the LegalKEY update for AccuRoute v2.3 to AccuRoute servers in a cluster:

- 1 Shut down the secondary server.
- 2 Stop the Cluster Manager service in the primary server.

- 3 Apply the update to the primary server. Go to [Installing LegalKEY update for AccuRoute v2.3](#).
- 4 Start the secondary server.
- 5 Shut down the primary server.
- 6 Stop the Cluster Manager service in the secondary server.
- 7 Apply the update to the secondary server. Go to [Installing LegalKEY update for AccuRoute v2.3](#).
- 8 Start the primary server.
- 9 Confirm that the primary server has resumed the workload in the cluster.

Installing LegalKEY update for AccuRoute v2.3

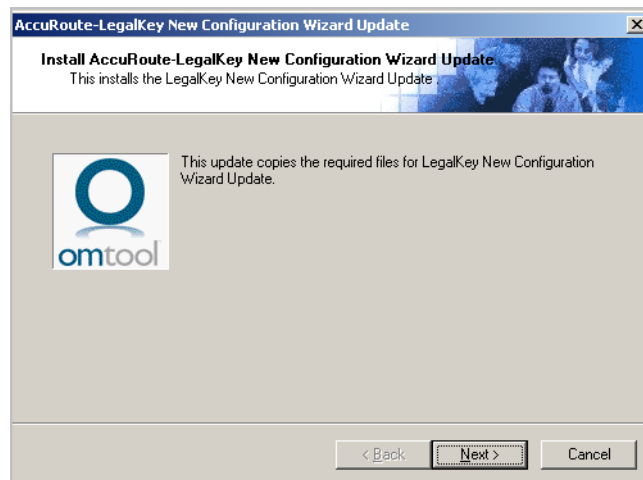
To install LegalKEY Update for AccuRoute v2.3:

- 1 Logon to the system running the AccuRoute server using an account that belongs to the local Administrators group.
- 2 Navigate to the folder where you saved the setup files and run [ARS2.3-LegalKey.exe](#).

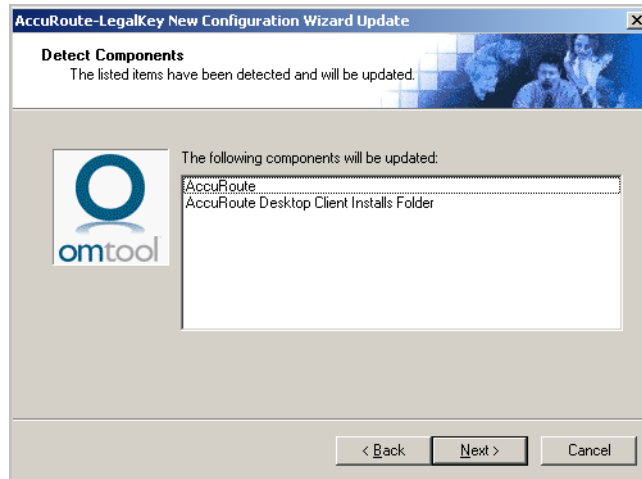
The **Omtool LegalKey Update** page opens prompting you to extract and install the update.



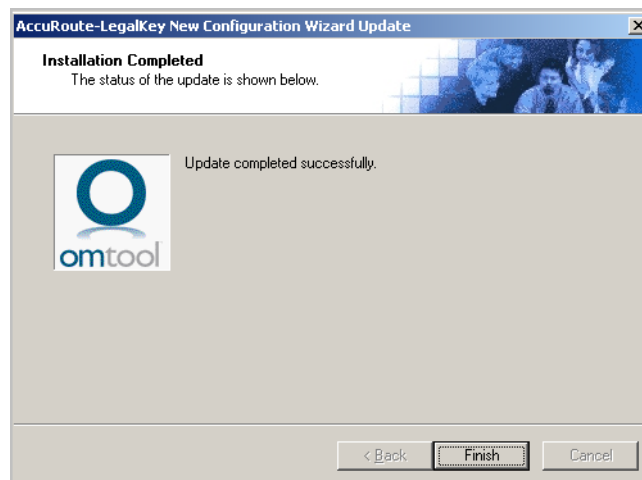
- 3 Click **CONTINUE** to extract the files to a temporary location on your system. When extraction is complete, the **AccuRoute-LegalKey New Configuration Wizard Update** page opens.



- 4 Click **NEXT**. The **Detect Components** page opens listing the components that will be updated.



- 5 Click **NEXT** to begin the apply the update. A progress bar shows the status of the update. When installation is complete you see the **Installation Completed** page.



- 6 Click **FINISH** to exit the wizard.

Note After the update is complete, new setup files are dropped in the AccuRoute Desktop folder in the **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\CLIENTS** directory. You must use the setup files of this folder and re-install AccuRoute Desktop on all client systems. For more information, see [Installing AccuRoute Desktop on all client locations using the updated AccuRoute Desktop setup kit \(3-7\)](#)

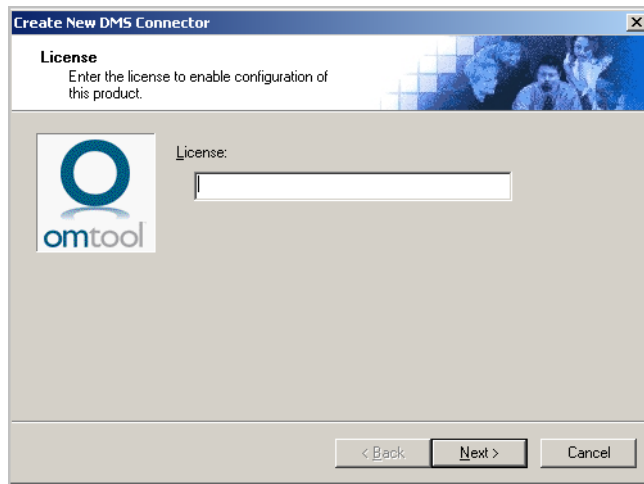
Adding the LegalKEY connector

If you have an existing LegalKEY DMS connector, you must re-configure the connector again. This is necessary because when you apply the LegalKEY update for AccuRoute v2.3, it updates the server.

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

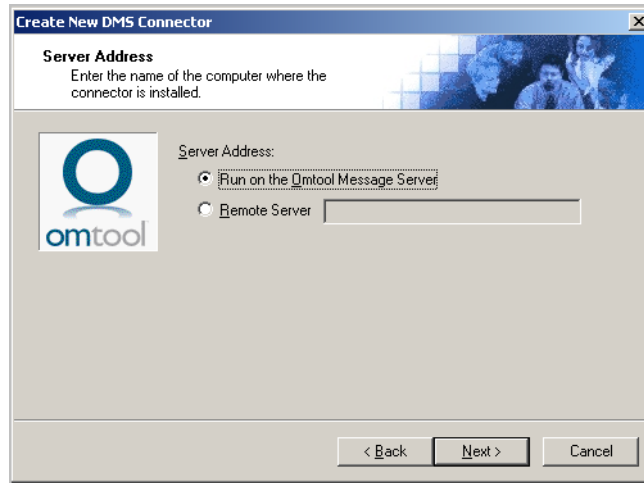
To add the LegalKEY connector to an AccuRoute server:

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



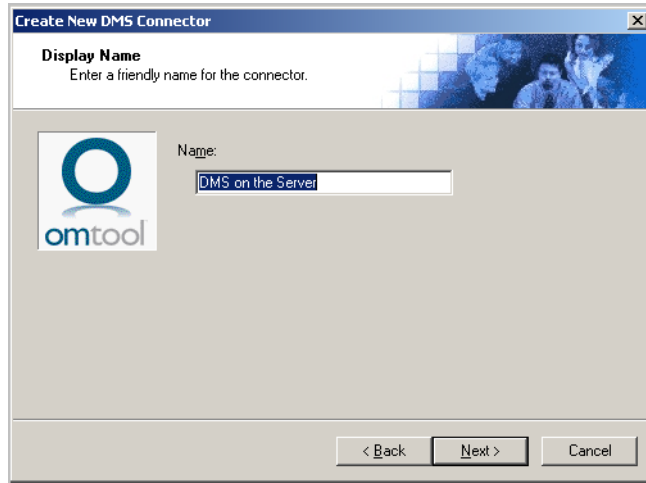
The screenshot shows a dialog box titled "Create New DMS Connector" with a close button (X) in the top right corner. The main heading is "License" with the instruction "Enter the license to enable configuration of this product." Below this is the Omtool logo and a text input field labeled "License:". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

- 2 In the **LICENSE** text box, enter the license key for the LegalKEY connector.
- 3 Click **NEXT**. The **Server Address** page opens.

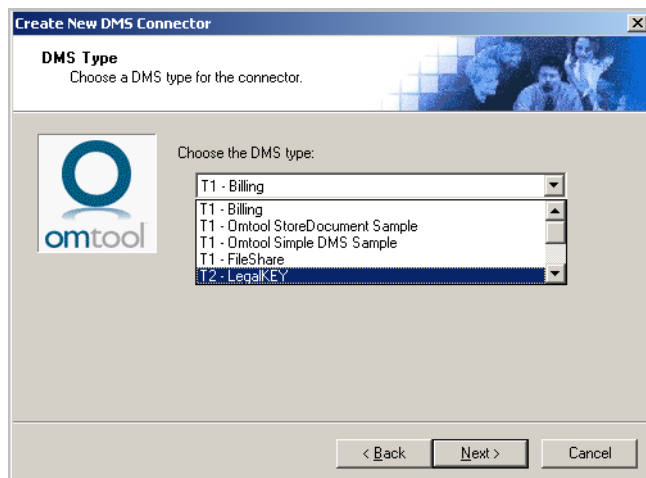


The screenshot shows the same dialog box, now on the "Server Address" page. The instruction is "Enter the name of the computer where the connector is installed." Below the Omtool logo, there are two radio button options: "Run on the Omtool Message Server" (which is selected) and "Remote Server" followed by a text input field. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

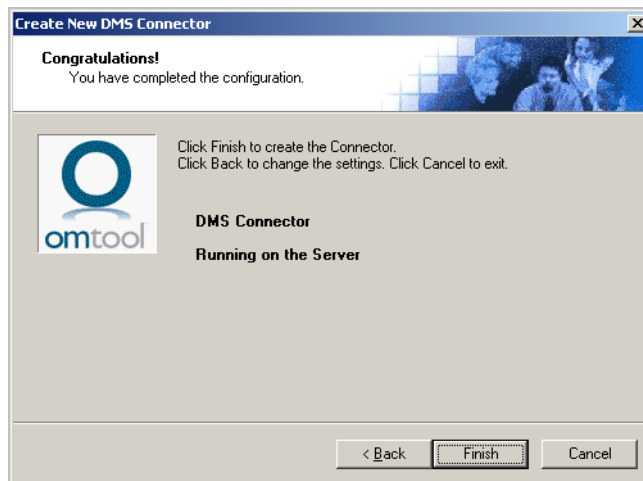
- 4 Verify the **RUN ON THE OMTOOL MESSAGE SERVER** option is selected. Click **NEXT**. The **Display Name** page opens.



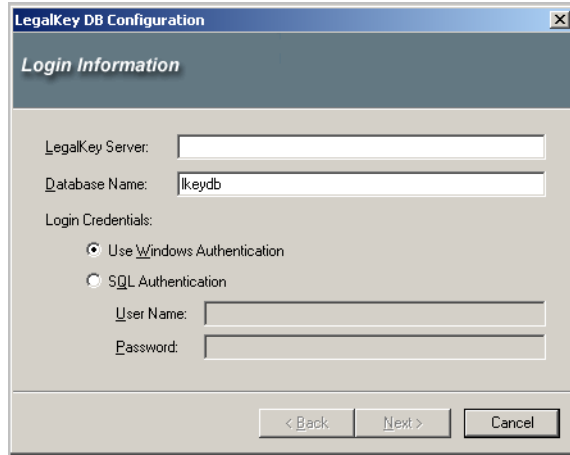
- 5 In the **NAME** text box, enter a descriptive name for this connector (the default is DMS on the Server). Click **NEXT**. The DMS Type page opens.



- 6 Select **T2 - LEGALKEY** from the drop-down list and click **NEXT**. The **Congratulations** page opens.



- 7 Click **FINISH**. The **LegalKeyDB Configuration** wizard opens.

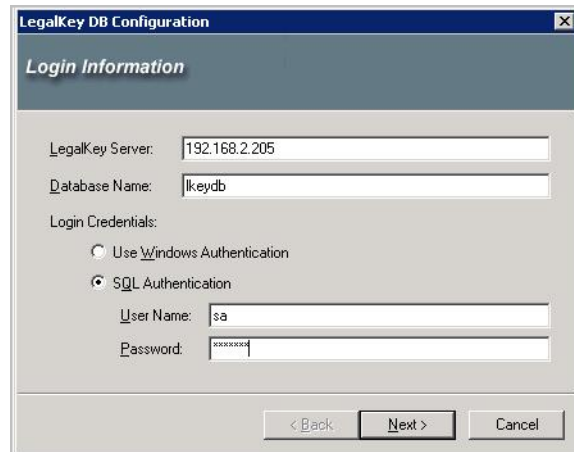


The screenshot shows the 'LegalKey DB Configuration' wizard window with the 'Login Information' tab selected. The fields are as follows:

- LegalKey Server: [Empty text box]
- Database Name: [lkeydb]
- Login Credentials:
 - Use Windows Authentication
 - SQL Authentication
 - User Name: [Empty text box]
 - Password: [Empty text box]

At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

- 8 In the **LEGALKEY SERVER** text box, enter the IP address of the LegalKEY server.
- 9 In the **DATABASE NAME** text box, enter the desired name (the default is lkeydb).
- 10 Enter the login credentials by selecting **SQL Authentication** and then entering the required information in the **USER NAME** and **PASSWORD** text boxes.



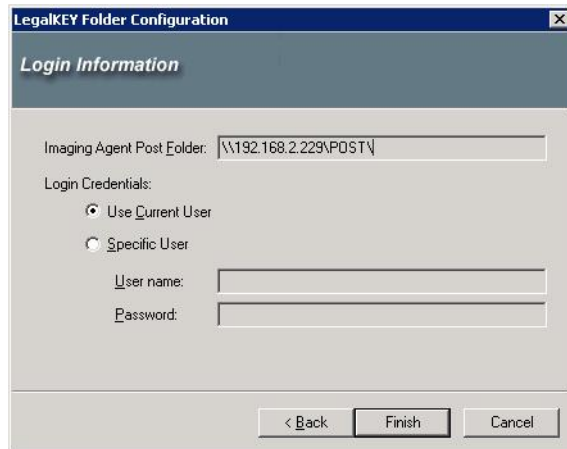
The screenshot shows the 'LegalKey DB Configuration' wizard window with the 'Login Information' tab selected. The fields are filled with example data:

- LegalKey Server: [192.168.2.205]
- Database Name: [lkeydb]
- Login Credentials:
 - Use Windows Authentication
 - SQL Authentication
 - User Name: [sa]
 - Password: [*****]

At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

- 11 Click **NEXT**. The **Login Information** page opens.

Note When you click Next,
** a connection with legalkey database is established
** the Drop folder from master_imageserv_settings table is retrieved
** whether the Drop folder exists and is accessible is validated.
Moreover, the fact whether the AR Server ID is mentioned in master_adt_appintegra table is also checked.



In the **Login Information** page, the Drop folder name retrieved from the database is displayed in the read-only mode.

- 12 Click **FINISH** to complete the configuration.

Installing AccuRoute Desktop on all client locations using the updated AccuRoute Desktop setup kit

To install AccuRoute Desktop on all client systems:

- 1 In the system running the AccuRoute v2.3 server, navigate to **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\CLIENTS\ACCUROUTE\DESKTOP** directory.
- 2 Copy the setup files from the AccuRoute Desktop folder and paste them in a previously created folder in all systems running the Desktop client.
- 3 Now re-install AccuRoute Desktop using the new setup files. For help, consult the [AccuRoute Desktop install guide](#).
- 4 Continue to [Configuring AccuRoute Desktop](#) (5-1) for instructions on how to configure Accuroute Desktop for LegalKEY recipient.

Section 4: Required server configuration

This section includes:

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

[Changing the label of a document](#) (4-2)

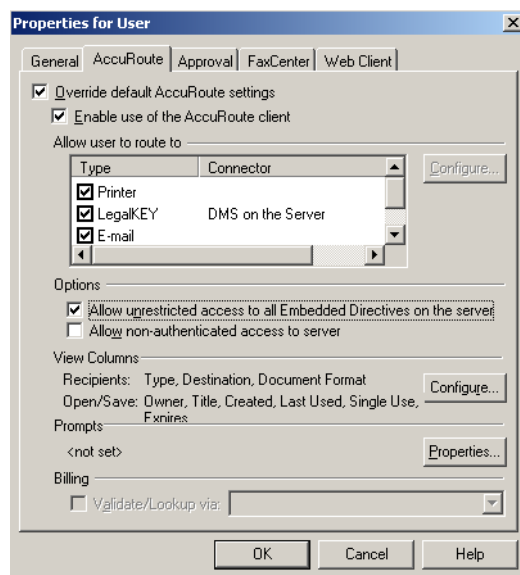
Enabling LegalKEY as a recipient type in AccuRoute Desktop

If you have added support for LegalKEY and you want to make it available to users as a recipient type in AccuRoute Desktop, you must modify the AccuRoute properties of registered users.

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

To enable LegalKEY as a recipient type in AccuRoute Desktop

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



Note Changes made to **REGISTERED USERS > USER DEFAULTS** do not affect any individual registered user.

LegalKEY is now available as a recipient in AccuRoute Desktop.

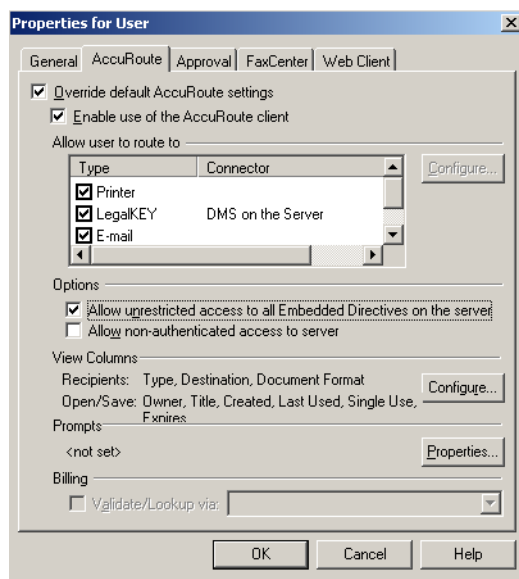
Changing the label of a document

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

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

To change the label of a document type

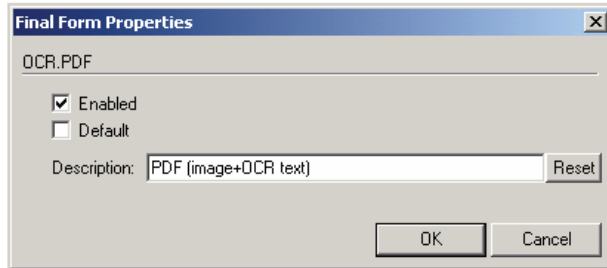
- 1 Click **REGISTERED USERS** in the console tree and double-click an individual user in the details pane, or right-click **REGISTERED USERS** in the console tree and select **USER DEFAULTS**.
- 2 Click the **ACCURROUTE** tab.
- 3 Highlight LegalKEY item in the **Allow user to route to** list.



- 4 Click **CONFIGURE** and to open the **Routing Destination Properties** page.
- 5 Click the **FINAL FORMS** tab.

6 Highlight the document type that needs to be modified and click **PROPERTIES**. The **Final Form Properties** page opens.

7 In the **DESCRIPTION** text box, enter the new label for this document type.



8 Click **OK** three times to close all the open dialogs.

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

Section 4: Required server configuration

Section 5: Client configuration

This section includes:

[Configuring AccuRoute Desktop](#) (5-1)

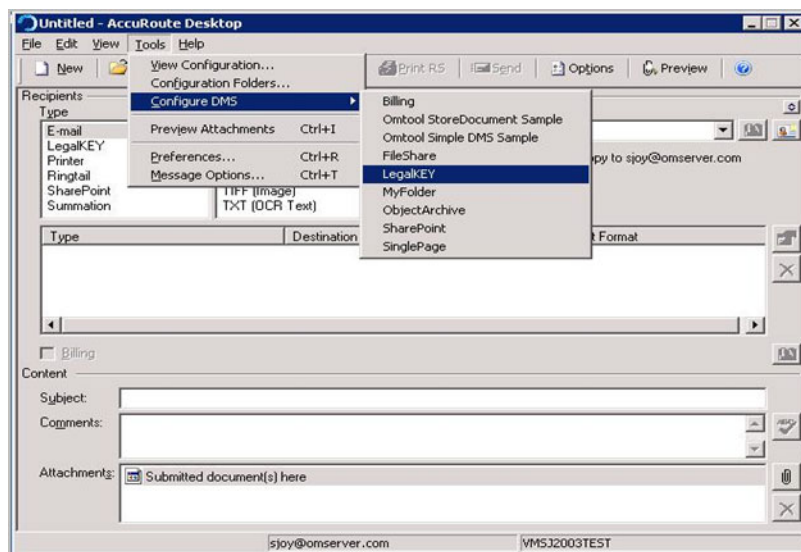
Configuring AccuRoute Desktop

Before you can configure the AccuRoute Desktop client, reinstall the AccuRoute Desktop on all client systems using the new setup kit available in the \CLIENTS directory (the new setup kit becomes available when you apply the LegalKEY update on the AccuRoute server). For more information, see [Installing AccuRoute Desktop on all client locations using the updated AccuRoute Desktop setup kit](#) (3-7).

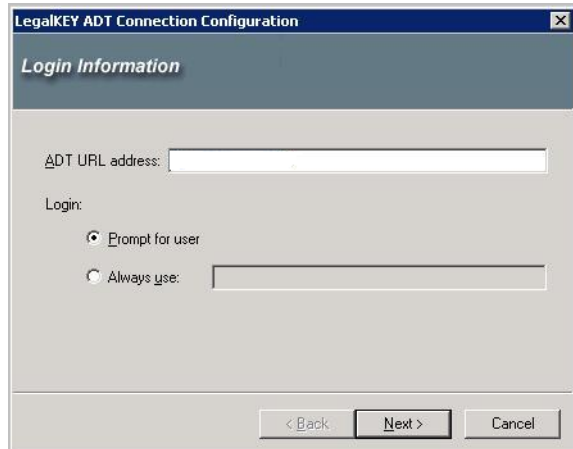
Note You must configure AccuRoute Desktop on all client systems where you reinstalled the AccuRoute Desktop client.

To add LegalKEY to AccuRoute Desktop:

- 1 Start AccuRoute Desktop and log in.
- 2 Click **TOOLS > CONFIGURE DMS**.
- 3 Select **LEGALKEY** from the menu.



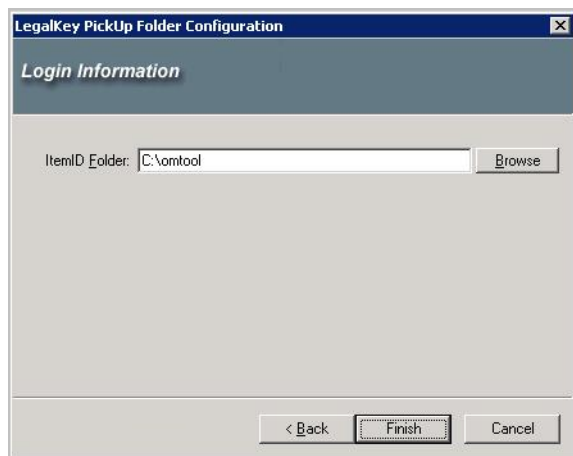
- 4 The **LEGALKEY ADT CONNECTION CONFIGURATION** page opens.



- 5 Specify the location of the AccuRoute Desktop and select a login option.
- ▶ In the **ADT URL ADDRESS** text box, enter the web address of LegalKEY Attorney Desktop.
 - ▶ In the **Login** section, select from
 - PROMPT FOR ADT USER** - Select this option if LegalKEY Attorney Desktop should prompt the user to log in (recommended for multiple-user workstations).
 - ALWAYS USE** - Select this option to connect to LegalKEY Attorney Desktop using a specific login ID and type the user name in the text box.

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

- 6 Click **NEXT**. The ADT URL you mention is validated. The LegalKey PickUp Folder Configuration is shown on the next page.



- 7** By default, the folder location is **C:\OMTOOL**. You can click the **Browse** button and select any other location as necessary. If the user selects any other location then it should match the value specified in `master_adt_settings` and `omtool_pickup_filepatch`. Alternately, you can enter the UNC path or drive mapping that identifies the location of the AccuRoute Desktop pickup folder.
- 8** Click **FINISH** to close the wizard.

Section 5: Client configuration

Section 6: Testing

This section includes:

[Sending a message to LegalKEY using AccuRoute Desktop.](#) (6-1)

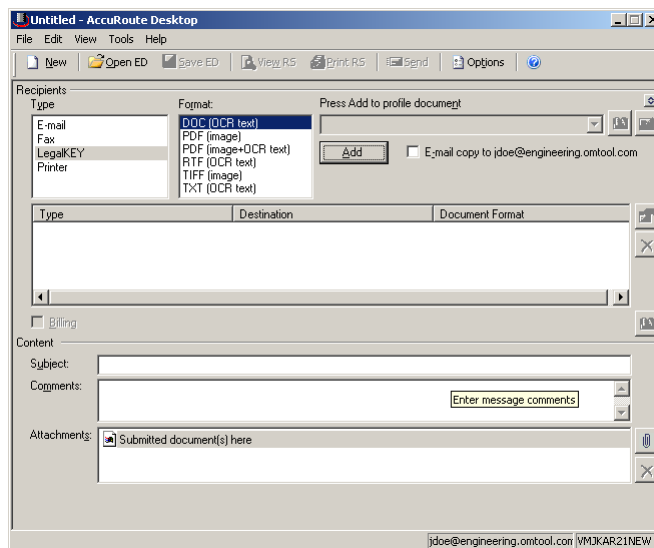
When you use the AccuRoute Desktop client or AccuRoute Desktop generated routing sheets, the documents that are routed to the AccuRoute server match a default hidden routing rule.

If you are planning to use the Document Image Separator pages generated by the LegalKEY Attorney Desktop client, additional configurations are necessary. For information, see [Appendix: Using LegalKEY Native Routing Sheet](#).

Sending a message to LegalKEY using AccuRoute Desktop.

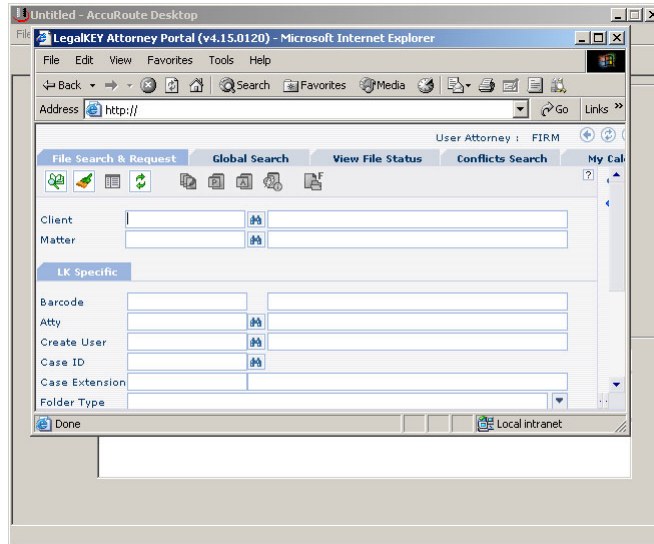
To send a message to LegalKEY using AccuRoute Desktop:

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

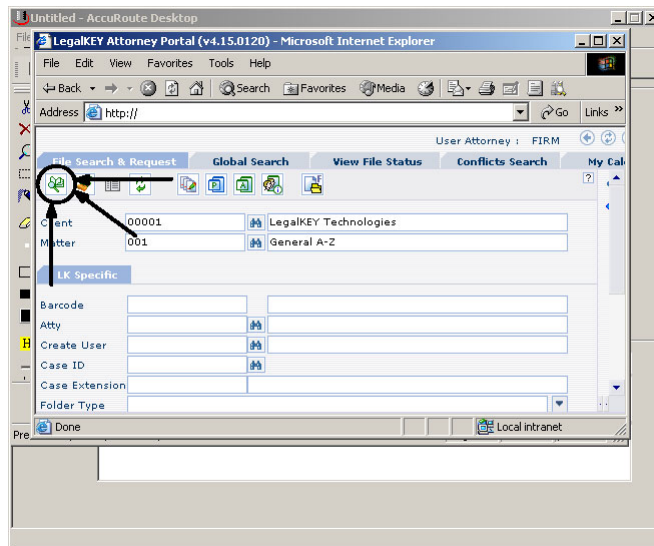


Section 6: Testing

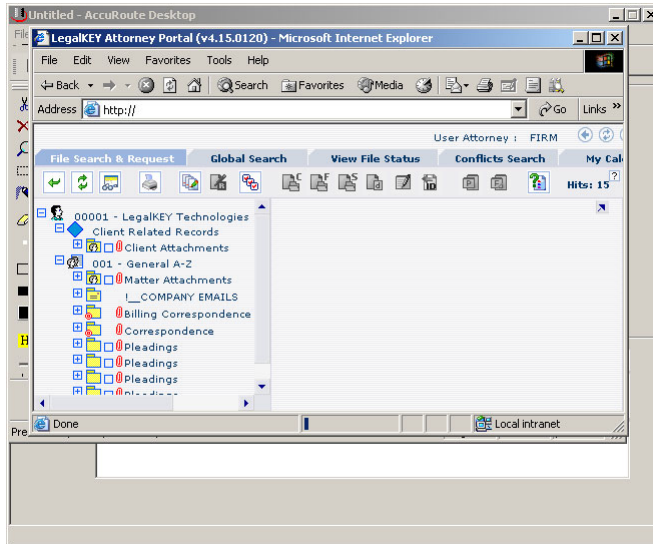
- 2 Select the destination type **LEGALKEY** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.
- 3 Click **ADD**. The LegalKEY Attorney Portal (v4.15.0120) window appears.



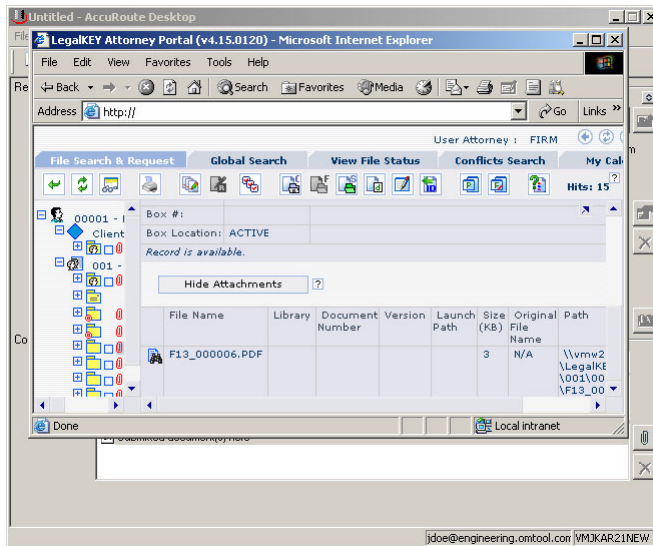
- 4 Type the appropriate client code in the **CLIENT** text box and click the binoculars button. (LegalKEY validates the client code.) Then type the appropriate matter code in the **MATTER** text box and click the binoculars button. (LegalKEY validates the matter code.)



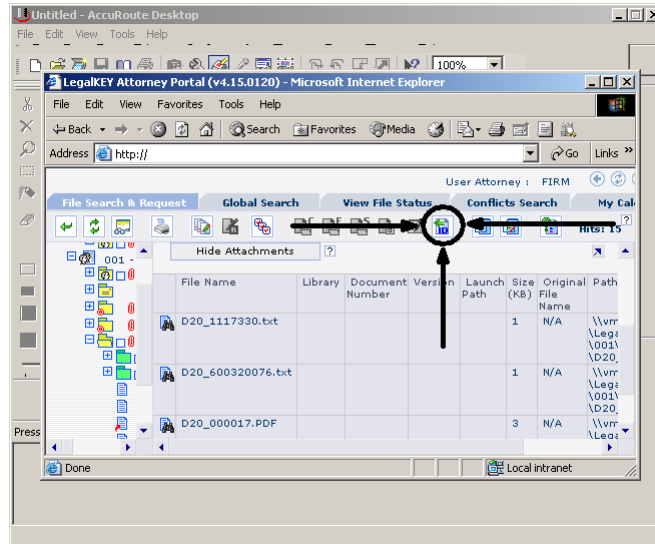
- Click **START SEARCH**. LegalKEY launches a query and returns a list of folders and files where you can save the document.



- Select a location for the document.



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



The document is added to the Recipient list.

- 8 Add content to your message.
- a Locate the **CONTENT** section at the bottom and type a subject and comments.
 - b Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:
 - FILE** - Select this option to attach a file saved from your computer or network share. Browse to the file, select it, and click **Open**. The file appears in the attachments list.
 - WEB DOCUMENT** - Select this option to attach a web page from the Internet. Type the address of the web document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML), and click **OK**.
- 9 Continue selecting options if necessary, and click **VIEW RS** to generate the Routing Sheet. (In the background, AccuRoute Desktop picks up the XML file from the AccuRoute Desktop pickup folder pickup folder, obtains the required document routing data, and generates the Routing Sheet.)

Section 7: Troubleshooting

This section includes:

[Detecting workflow issues](#) (7-1)

[Troubleshooting the delivery mechanism](#) (7-1)

[Troubleshooting the message on the Omtool server](#) (7-2)

[Troubleshooting the multifunction device](#) (7-4)

[Troubleshooting the client](#) (7-4)

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

Detecting workflow issues

After a document has been profiled to LegalKEY, the document should arrive at its destination momentarily, but can take up to several minutes when the server workload is high. If a document does not arrive at its destination within a reasonable period of time, begin troubleshooting the environment. Omtool recommends troubleshooting the workflow in reverse order because this is the easiest way to troubleshoot the setup on your own.

The easiest way to troubleshoot a workflow issue is to follow the document through the workflow in reverse order. When a document does not arrive at its destination, troubleshooting starts with LegalKEY, and then continues to the Omtool server, the device (if applicable), and then the client.

Continue to [Troubleshooting the delivery mechanism](#).

Troubleshooting the delivery mechanism

When the Omtool server finishes processing a message, an outbound connector routes the message directly to its destination or passes the message to LegalKEY. Do some basic troubleshooting on LegalKEY. For example, is the Imaging Agent running? Is the Imaging Agent looking at the pickup/drop folder? Go to [Identifying LegalKEY pickup and drop folders](#) on 2-2.

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

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

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

Troubleshooting the message on the Omtool server

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

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

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

To locate the message on the Omtool server:

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

a Click **IN PROCESS**.

b View **ALL ITEMS**.



c Sort all items by the date submitted.

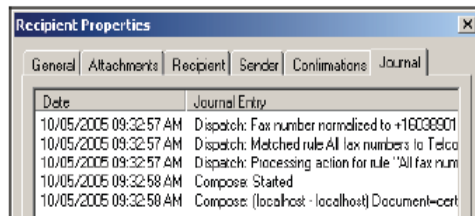
d Look for the message.

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

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

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

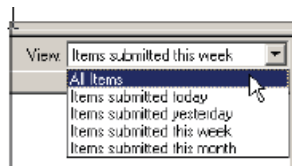
Also, check the Event Viewer for any information that might help troubleshoot the issue.



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

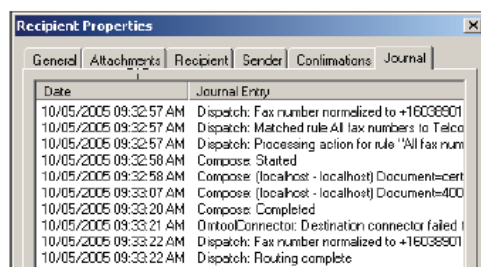
4 Look for the message in the History queue:

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



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

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



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

If the journal states that Omtool server delivered the message but it still has not arrived at its destination, this indicates that the Omtool server transferred the message to LegalKEY successfully.

Do some advanced troubleshooting on LegalKEY to determine why the message is not being delivered to its destination. Contact Omtool if you are unable to resolve the issue. (Go to [Customer service and technical support](#) on the inside front cover.)

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

- **Message not found** - If the message is not found, the next step is to troubleshoot the multifunction device.

Continue to [Troubleshooting the multifunction device](#).

Troubleshooting the multifunction device

After troubleshooting all other components in the workflow, troubleshoot the device. Consult the device manufacturer's documentation.

Continue to [Troubleshooting the client](#).

Troubleshooting the client

If the device is working properly, try sending a message from the client to a recipient other than LegalKEY. If you are able to send messages to recipients other than LegalKEY and LegalKEY is operating correctly, contact Omtool. (Go to [Customer service and technical support](#) on the inside front cover.)

Appendix: Using LegalKEY Native Routing Sheet

This section includes:

[Introduction](#) (8-1)

[Required configurations](#) (8-2)

[Workflow of document routing using Document Image Separator pages](#) (8-5)

Introduction

The AccuRoute server can read and process Document Image Separator pages (which are LegalKEY Native Routing Sheet pages) generated by the LegalKEY Attorney Desktop client. They provide an alternate way for the AccuRoute server to route documents to the LegalKEY repository without using the AccuRoute Routing Sheets.

This is useful in situations where:

- User has no access to the AccuRoute Desktop client to generate AccuRoute Routing Sheets
- User must use the LegalKEY Native Routing Sheet to route documents via the AccuRoute server
- User needs to scan multiple documents and route them to the LegalKEY repository.

The Document Separator pages generated by the LegalKEY Attorney Desktop client have three (3) sections in the barcode: hard coded **STARTCODE** and **ENDCODE** portions and a middle code portion, which contains the barcode id of the document record in the LegalKEY repository from which the barcode scan cover sheet was generated (for example "D5613475"). Now when the user goes to a multifunction device and scans a document with the Document Image Separator page at the top, the document is sent to the AccuRoute server for processing. The AccuRoute server decodes the barcode and routes the document to the LegalKEY repository via the LegalKEY connector. In the repository, the document is saved as D5613475.pdf.

In case the user has multiple documents to scan and route to a LegalKEY repository, he can speed up and streamline the process by generating multiple Document Separator pages and creating a stack of documents with the separator pages defining the beginning and ending of each document. Now when the user goes to a multifunction device and scans a document stack, it is submitted to the AccuRoute server for processing. The AccuRoute server processes the document stack and breaks it into multiple documents using the separator pages to determine the start and end of each document. Then the documents are delivered to the LegalKEY repository via the LegalKEY connector. Each document is saved in the LegalKEY repository as [middle barcode ID].pdf.

For instructions on how to use the AccuRoute Desktop client to send documents to LegalKEY, see [Section 6: Testing](#) (6-1). For requirements information, see [Section 2: Requirements](#) (2-1).

Required configurations

This section includes:

- [Creating and configuring virtual control file](#) (8-2)
- [Creating Routing Rule](#) (8-2)
- [Enabling the Barcode Extractor component](#) (8-3)
- [Manually adding START CODE and END CODE in the MS SQL database](#) (8-4)
- [Creating QUEUE and POST folders](#) (8-4)
- [Verifying information in master_adt_appintegra](#) (8-5)

These configurations are needed only if you are using the LegalKey Native Routing sheets.

Creating and configuring virtual control file

To create a virtual control file, follow these steps:

- 1 Start Notepad and open a blank document.
- 2 Enter `#SENDER_EMAIL [emailaddress]`, for example, `jane@yourcompany.com`.
- 3 Enter `#DESTINATION 1234`
- 4 Save the file and name it as **virtual.control** file.

Note Note: Do not save this file as a .txt file.

- 5 Copy the file to the Filescan folder.

Creating Routing Rule

Create the following outbound rule

If destination is Fax number is 1234, then route to LegalKEY connector.

For instructions on creating rules, click [here](#).

Note Note: When creating the rule, you must select PDF as the delivery format for documents and set the core property value. For configuration instructions, see [Configuring the Route to Connector page when creating rules](#).

Configuring the Route to Connector page when creating rules

To configure the page:

- 1 Open the **Route to Connector** page, go to the **Document Delivery Format** option.
- 2 Select **PDF** from the drop down menu.
- 3 Click **ADVANCED** to set the Core property value. The **Advanced Routing Options** page opens.
- 4 Click **CUSTOM PROPERTIES**. The **DMS Rule Properties** page opens.
- 5 Select **CORE PROPERTIES**. Click **ADD**. The **Core Property** page opens.
- 6 In the **NAME** text box, enter `prDataExtraction`.
- 7 In the **VALUE** text box, enter `3`.
- 8 Click **OK, OK, OK** and then **FINISH** to close the Route to Connector page.

Enabling the Barcode Extractor component

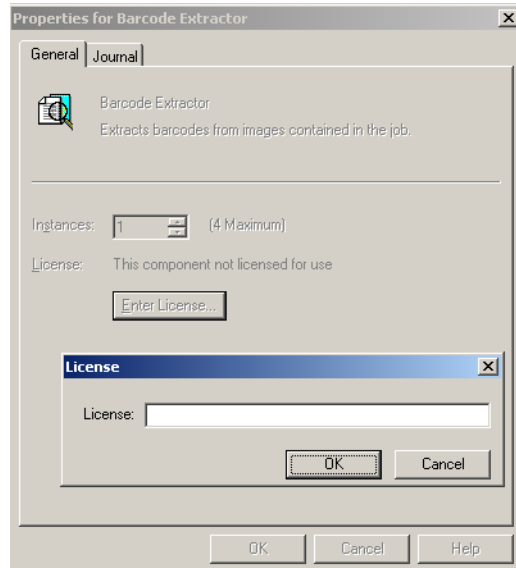
Note If the Barcode Extractor component in your environment is already enabled and functional, skip this step.

A purchased license number is required to enable this component. Contact [Omtool sales](#) for more information. You can have up to four (4) instances of the Barcode Extractor component running simultaneously in your server environment.

To enable the Barcode Extractor component:

- 1 Click **START > ALL PROGRAMS > OMTIOL > OMTIOL SERVER ADMINISTRATOR** to open the server Administrator.
- 2 In the console tree, double click **COMPONENTS**.
- 3 All the server components are listed in the details pane.
- 4 Double click **Barcode Extractor** component to open the **Properties** page.

- 5 Click the **ENTER LICENSE** option. The **License** page opens.



- 6 In the **LICENSE** text box, enter a valid license number.
7 Click **OK**.

The license number is verified and if it is a valid license number, the Barcode Extractor component is enabled. Now the **Properties** page lists the license number of the component.

Manually adding START CODE and END CODE in the MS SQL database

The following modifications must be made so that the barcodes in the Document Image Separator pages have three sections: hard coded **STARTCODE** and **ENDCODE** portions and a middle code portion, which contains the barcode id of the document record in the LegalKEY repository.

To modify the database:

- 1 Open MSSQL Enterprise Manager.
- 2 Expand **Databases** and choose **lkeydb**.
- 3 Select **groups32** table and right click. Select **OPEN TABLE > RETURN ALL ROWS**.
- 4 Modify **groups32.vnd_barcode_start** to have the value: [START CODE](#).
- 5 Modify **groups32.vnd_barcode_end** to have the value: [END CODE](#).

Creating QUEUE and POST folders

On the server root directory create a shared folder **LegalKEY** or any UNC path (**\\COMPUTER\LEGALKEY**). Create two sub folders **QUEUE** and **POST** in the **LegalKEY** folder.

Verifying information in master_adt_appintegra

Verify the following information in master_adt_appintegra table: connector_id matches the routing identifier name in the legalkey dms connector on the accuroute server.

Workflow of document routing using Document Image Separator pages

The following workflow explains what happens when a user generates a Document Separator page, scans a document from a multifunction device using the Document Separator page and routes it to the LegalKEY recipient.

- User logs into LegalKEY Attorney Desktop client and generates the Document Separator page with the three sections: hard coded STARTCODE and ENDCODE portions and a middle code portion with the barcode id of the document record in the LegalKEY repository.
- User uses the Document Separator page as the first page of the document to be scanned. He places it on top of the document, goes to a multifunction device and scans the document.
- The document is routed to the Filescan folder where it is processed by the virtual control file and routed to the AccuRoute server via the Filescan connector.
- The document arrives in the Accuroute server for processing. The Barcode Extractor component recognizes the barcode in the Document Image Separator page and extracts the recipient information. It composes the message and then routes the message to the recipient using the matched routing rule (see [Creating Routing Rule](#)).
- The LegalKEY connector sends the message to the LegalKEY repository.

Section 8: