AccuRoute® Extensions for HP Autonomy WorkSite® Installation Guide

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Omtool, Ltd.
6 Riverside Drive
Andover, MA 01810
Phone: +1/1 978 327 5700
Toll-free in the US: +1/1 800 886 7845
Fax: +1/1 978 659 1300

Omtool Europe
25 Southampton Buildings
London
WC2A 1AL
United Kingdom
Phone: +44/0 20 3043 8580
Toll-free in the UK: +44/0 80 0011 2981
Fax: +44/0 20 3043 8581

Web: http://www.omtool.com

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Section 1: Overview

Features

AccuRoute enables HP Autonomy iManage WorkSite users to import hardcopy documents into WorkSite libraries. The process is driven from the native WorkSite user interface using its screens and menus. AccuRoute can convert the scanned documents into text-searchable format (PDF or DOC), and then save the resulting document into the proper WorkSite library, fully profiled and stored alongside other electronic content. Once imported, you can browse through the document libraries to locate these documents, or use WorkSite enterprise search capabilities.

A user within the iManage FileSite or DeskSite client interface can select an **Import Scan** option to specify profile information for the document that will be scanned later. When the document is scanned, it is uploaded to iManage in the target folder with the specified profile information. The scan can be accomplished using an MFP or other network-connected scanning device.

The **Send to AccuRoute** option also is available from iManage FileSite or DeskSite. With this option, a user can extract one or more documents from the iManage repository and have these documents uploaded and attached to a new message composed using the AccuRoute Desktop or Web Client.

HP iManage WorkSite users can select from the following options to route inbound documents:

- **Create New Routing Sheet** - Create a Routing Sheet from within your HP Autonomy WorkSite document library. You can use the Routing Sheet to scan hardcopy documents from any scan enabled device. The documents are submitted to the AccuRoute server for processing and routing to the WorkSite repository according to the Routing Sheet instructions.
- **Create Scan Reservation** - Create a WorkSite placeholder. When a Personal Distribution is selected from the device, the document scans to that placeholder.
- **Open in End User Interface** - Submit an electronic document directly from the WorkSite client to the server.

Requirements

AccuRoute server

The system where you install AccuRoute Extensions for HP Autonomy WorkSite must be running:

- AccuRoute v4.1

HP Autonomy WorkSite client

AccuRoute for Autonomy WorkSite can be installed with:

- Autonomy iManage WorkSite (DeskSite and FileSite) v8.5 – v9.0
- Windows 2008 R2 64-bit environment, Windows 2012 64-bit environment

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Related documentation

- AccuRoute v4.1 Server Installation Guide
- Omtool Server Administrator Help
- AccuRoute Extensions for HP Autonomy WorkSite Quick Start Guide

Note The quick start guide has been designed to be posted near the device, distributed to device users, and published on your organization's intranet.

For all documentation related to AccuRoute v4.1, consult the AccuRoute v4.1 documentation page.

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Section 2: Installation

Installation involves two procedures, as described in this section:

Installing AccuRoute for HP Autonomy WorkSite client on the DeskSite or FileSite client system (2-1)

Entering a license for AccuRoute Extensions for HP Autonomy WorkSite (2-2)

Also included in this section are the processes for:

Running the AccuRoute Extensions for HP Autonomy WorkSite setup in silent mode (2-5)

Installing AccuRoute Extensions for HP Autonomy WorkSite for all users in silent mode (2-6)

Installing AccuRoute for HP Autonomy WorkSite client on the DeskSite or FileSite client system

1. Log in to the system using an account that belongs to the Administrators group.
2. Navigate to the AccuRoute server system and find the following directory:

   `C:\Program Files (x86)\Omtool\Omtool Server\Clients\Extension for iManage`
3. Run `Setup.exe`. The setup configures your system and opens the **InstallShield** wizard showing the **Welcome** message.
4. Click **Next**.
5. If the AccuRoute Desktop Client is installed (if it is not installed, skip this step), the setup will prompt you to indicate where you want AccuRoute Extensions for HP Autonomy WorkSite to send documents:
   - **Upload to Web Client**
   - **Launch AccuRoute Desktop**

   Click **Next**. The **Destination Folder** page opens. Optionally, change the folder location.
6. If the AccuRoute Desktop Client is not installed, the **Web Client URL** page is displayed. Enter the URL.
7. Click **Next**. The **Ready to Install the Program** page opens.
8. Click **Install** to begin the installation. When installation is complete, you will see the **Installation Completed** message.
9. Click **Finish** to close the **InstallShield** wizard.

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Entering a license for AccuRoute Extensions for HP Autonomy WorkSite

> **Note** AccuRoute Client Option Packs require a license. For more information, contact Omtool Sales.

You can activate the AccuRoute Extensions for HP Autonomy WorkSite license in one of two ways:

- Automatically when you enter an activation code and the AccuRoute server is on a system that has access to the internet.
- Manually if the AccuRoute server does not have access to the internet. In this case, you will:
  - Submit and validate the activation code.
  - Create an Export file into which the activation code is copied.
  - Create an Import file and use this file for activation from a system that does have internet access.

Automatic license activation

Be sure the AccuRoute server has access to the internet. Have available a copy of the activation code.

1. Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
2. Expand the tree view and select the server name.
3. Right-click and select the **Licensing** option**.** The **Licensing** page is displayed.
4. Click the **Activate License...** button. The **License Activation** page is displayed.
5. Select the **Automatically activate via the Internet** option.
6. Enter your license activation code in the **Activation Code** text field.
7. Click **OK**. The server is updated with your license.
8. Click **Close** to complete the procedure.

Manual license activation

Have available a copy of the activation code.

> **Note** Although the AccuRoute server may not have access to the internet, to complete this procedure you will need a system that does have access.

1. Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
2. Expand the tree view and select the server name.
3. Right-click and select the **Licensing** option**.** The **Licensing** page is displayed.

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4 Click the **Activate License...** button. The **License Activation** page is displayed.

5 Select the **Export activation file for manual activation** option.

6 Create an Export license file:

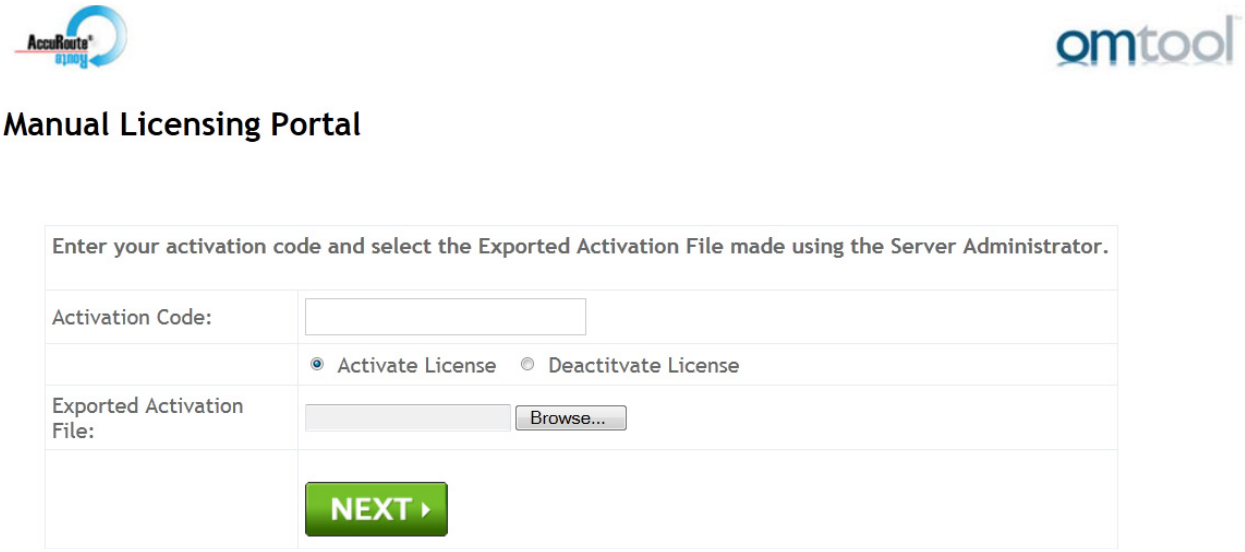
   a Browse to a location where you want to save the license file. By default, the file is an Export file named `ManualActivation.exp`. After specifying the file name and location, click **Save**.

   b The path will appear in the **Export Filename** field on the **License Activation** page. Click **OK**.

7 From a system with internet access, launch the web browser and go to:

   `https://license.omtool.com/accuroute`

   The **Manual Licensing Portal** page opens.



8 Enter your license activation code in the **Activation Code** text field.

9 Be sure the **Activate License** option is selected (the default).

10 Click the **Browse** button to select the `ManualActivation.exp` file created in Step 6. With the file name selected (highlighted), click **Open**.

11 Verify that the license information is entered correctly on the **Manual Licensing Portal** page.

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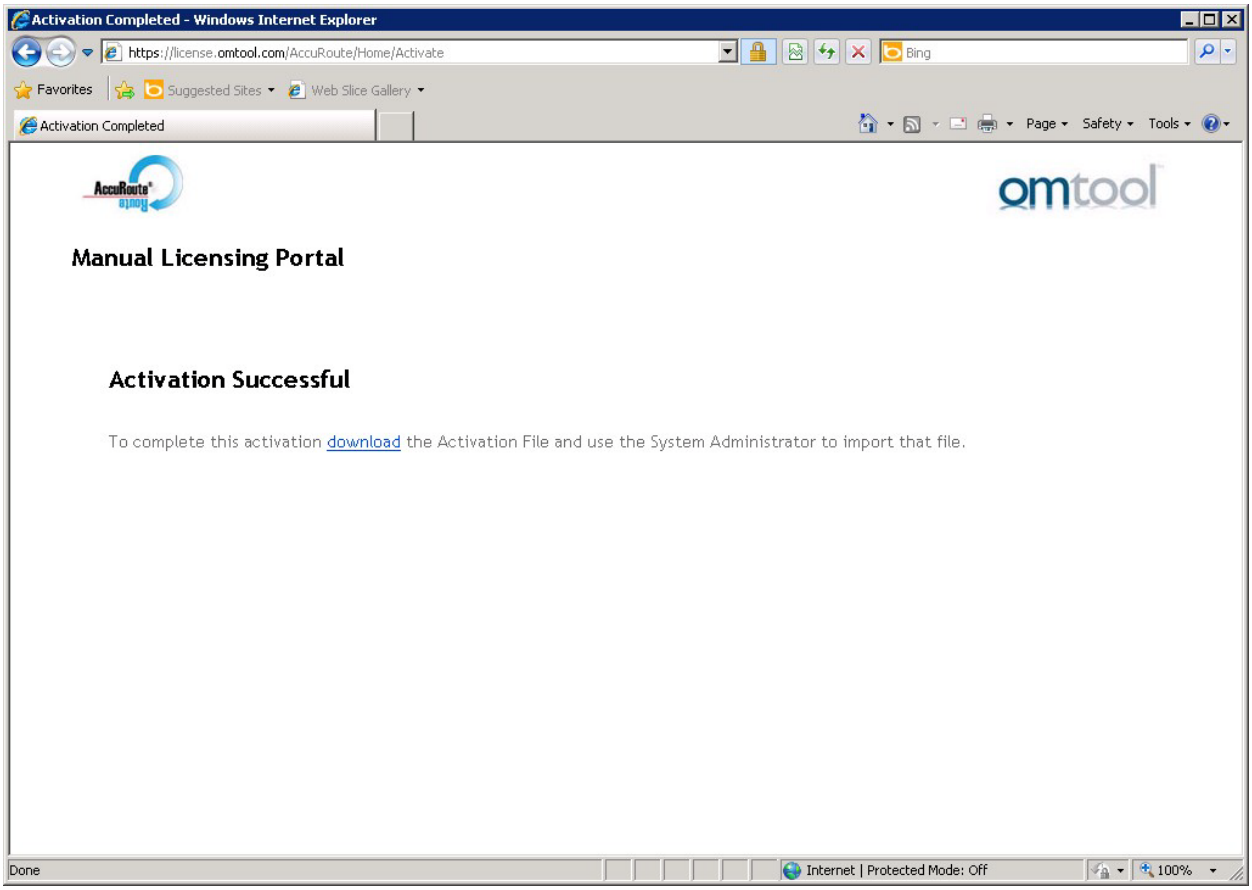
12 Click **NEXT** and the **Activation Successful** message is displayed.



13 To complete the activation, click **Download**. The **File Download** page is displayed.

14 Click **Save** to create the Import file. By default, the file is named with the activation code. You can change this (for example, `ManaulActivation.imp`) and select a location for the file on the AccuRoute server.

15 Click Save. The **Download Complete** page shows that status of the file download.

16 Click **Close**.

Note You can minimize or close the browser.

17 On the **Licensing** page, click the **Activate License...** button.

18 Select the **Import activation file from manual activation** option.

19 Browse to the saved `ManaulActivation.imp` file. Select the file and click **Open**.

20 Click **OK** on the **License Activation** page. The license is updated.

21 Click **Close** to complete the procedure.

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Running the AccuRoute Extensions for HP Autonomy WorkSite setup in silent mode

To run the AccuRoute Extensions for HP Autonomy WorkSite setup in silent mode:

1. Log on to the Server with an account that belongs to the Administrators group, for example, a member of the Local Admins group.
2. Open a command prompt.
3. Change the current directory to the one containing the setup files. The default location is

   `C:\Program Files (x86)\Omtool\Omtool Server\Clients\Extensions for iManage`.
4. Run one of the following:

   - For WorkSite Print to Web: `setup.exe /s /V"/qn ADDLOCAL=WebClientUpload,INTERWOVEN_DESKSITE,INTERWOVEN_FILESITE ACCUROUTE_SERVER=`*`http://server/WebClient`*`"`

     where *`http://server/WebClient`* has the appropriate path for your environment.
   - For WorkSite Print to AccuRoute Desktop: `setup.exe /s /V"/qn ADDLOCAL=ARDLauncher,INTERWOVEN_DESKSITE,INTERWOVEN_FILESITE`

   Note If your system does not include DeskSite or FileSite, you can remove `INTERWOVEN_DESKSITE,INTERWOVEN_FILESITE` from the command line entry.

   This installs AccuRoute Extensions for HP Autonomy WorkSite to the default location:

   `C:\Program Files\Omtool\Extensions for iManage`

   Note To install AccuRoute Extensions for HP Autonomy WorkSite for all users in silent mode, see Installing AccuRoute Extensions for HP Autonomy WorkSite for all users in silent mode (2-6).
5. Optionally, to change the location, set the property `INSTALLDIR` and run `setup.exe /s /v"/qn INSTALLDIR=<`*`short name path`*`>"`, where `<`*`short name path`*`>` is the short name path to the target folder.
   (The entire path must be in short name format. For example, if the long path is `J:\Program Files\Omtool\Extens~1`, then the short path is `J:\PROGRA~1\OMTOOL\EXTENS~1`.)

   Tip The command for short name conversions is `dir /x`. Run this command in any directory to return the short names of all folders in that directory. For example, to do a short name conversion on `J:\Program Files`, change the current directory to `J:\` and run `dir /x`.
6. Verify that AccuRoute Extensions for HP Autonomy WorkSite is installed on the client by navigating to `...\Omtool\Extensions for iManage` on the client and verifying that the AccuRoute Extensions for HP Autonomy WorkSite program files are installed.

Installing AccuRoute Extensions for HP Autonomy WorkSite for all users in silent mode

To install AccuRoute Extensions for HP Autonomy WorkSite for all users in silent mode:

1. Start by following the instructions in Running the AccuRoute Extensions for HP Autonomy WorkSite setup in silent mode (2-5).
2. In step 4, where you run the setup file, add the following argument:

   ```
   ALLUSERS=1:setup.exe /s /v"/qn ALLUSERS=1
   ```

   Note The `ALLUSERS` argument is required to successfully complete the installation. If you do not use this argument and log in to the system with a user credential different from that used for the installation, the AccuRoute Extensions for HP Autonomy WorkSite will not appear in the **Add/Remove Program** list.

3. Sign in as a different user and verify that AccuRoute Extensions for HP Autonomy WorkSite is listed in **Start > All Programs > Add/Remove programs**.

Section 3: Configuration

This section includes a procedure for adding the AccuRoute connector for HP Autonomy WorkSite.

Note The WorkSite client needs to be installed on the AccuRoute server before adding the connector.

Adding the AccuRoute connector for WorkSite

This required configuration is done from the AccuRoute server. All documents that are processed by the AccuRoute server are sent to WorkSite via the WorkSite (DMS) connector.

1. Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
2. Right-click on **Connectors** and select **New AccuRoute Server connector for > WorkSite**. The **Server Address** page opens.
3. Select the Server Address option:
   - **Run on the Message Server**
   - **Remote Server** and enter the server address in the text box.
4. Click **Next**. The **Display Name** page opens.
5. In the **Name** text box, enter a friendly name for the connector.
6. Click **Next**. Then, click **Finish**. The **DMS Configuration** page opens.
7. Specify the **WorkSite Server**.
8. Enter login information for a **Specific User**.
   Or, select the **Use Trusted Login** option.
9. Click **Next**. Additional DMS configuration options are displayed.
10. Select options for the **Login configuration** and **Profile type**.
11. Select the **Placeholder** option if you want to retain placeholder profiles in WorkSite after creating an Embedded Directive.
12. Click **Next**. The **Interwoven Records Manager** options are displayed.
13. Select an option to indicate whether or not you want to declare new profiled items as records.
14. Click **Finish** to complete the configuration.

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