AccuRoute® Server Installation and Integration Guide

For AccuRoute v3.01

June 2012

Omtool Support and Sales

Online resources

The Omtool web site provides you with 24-hour access to documentation, software updates and other downloads, and detailed technical information that can help you troubleshoot issues. Go to http://www.omtool.com/support and log in using your customer number. Then click one of the following:

- **KNOWLEDGE BASE** to access technical articles.
- **DOWNLOADS & DOCS** to access online documentation, software updates, and downloads.

Customer service and technical support

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

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

Technical support requires an active support contract. For more information, go to http://www.omtool.com/support/entitlements.cfm.

Sales, consulting services, licenses, and training

Contact Omtool Sales using any of the following methods:

- **Phone**: 978-327-5700 or 800-886-7845 (toll-free in the US)
- **Fax**: 978-659-1300
- **E-mail**: sales@omtool.com

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Section 1: Introduction

The AccuRoute Server Installation and Integration Guide 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.

This section includes:

Introduction to AccuRoute

AccuRoute is Omtool's award-winning document-handling platform that captures, converts and distributes paper and electronic-based documents enabling fast, secure, simultaneous distribution of data to multiple destinations in multiple formats. Using AccuRoute, an organization can deliver information faster with more efficient workflows while reducing cost, complexity and risk.

About Omtool

Omtool, Ltd. is a leading provider of document handling solutions that simplify the integration of paper and electronic documents in enterprise information management systems. Omtool solutions are used worldwide by businesses in document-intensive industries that demand secure handling, integration and tracking of documents in full compliance with a range of regulatory requirements.

Scalability and automated failure

AccuRoute is a highly scalable enterprise application that can be deployed in organizations of all sizes. Its robust server-client architecture supports distributed workloads, versatile throughput and unmatched document distribution capabilities using numerous delivery systems and methods. Moreover, AccuRoute supports automated failover. In case of a system failure on the AccuRoute Server, automated failure promises seamless recovery using a standby server.

With smaller workloads, the AccuRoute Server can suitably perform all the functions required for document distribution. As an organization grows, the AccuRoute Server workload can be distributed or completely off-loaded using one or all of the following components:

- **Object Archive database -** A remote system hosting the Object Archive database. (Go to Section 8: Installing ObjectArchive**.)**

- **Remote Administrator** - A remote system hosting Omtool Server Administrator, the management application for AccuRoute. (Go to Section 9: Installing Remote Administrator.)

- **Remote AccuRoute Compose Component (Composer)** - A remote system hosting a Composer, which performs document conversion tasks. (Go to Section 10: Installing Remote Composer.)

- **Remote Modem Server** - A remote system hosting a Modem Server. (Go to Section 11: Installing Remote Modem Server.)

- **Remote Embedded Directive Manager component** - A remote system hosting the Embedded Directive Manager component. (Go to Section 12: Installing Remote Embedded Directive Manager.)

- **Remote AccuRoute Connector for DMS Libraries** - A remote system hosting an AccuRoute Connector for DMS Libraries (Go to Installing Remote AccuRoute Connector for DMS Libraries on 13-1.)

- **Remote AccuRoute Intelligent Device Client** - For installation and configuration instructions, see (Go to Section 14: AccuRoute Intelligent Device Client.)

- **Secondary server** - A secondary system in a failover configuration. (Go to Appendix A: Setting up an AccuRoute Server cluster.)

To purchase additional connectors or components, contact an Omtool Sales representative. For contact information, see Omtool Support and Sales.

Built-in features for AccuRoute Server

The AccuRoute Server has the following built-in features:

- **Centralized administration** - You can manage an AccuRoute Server using the Omtool Server Administrator, a snap-in for Microsoft Management Console. After you connect the Omtool Server Administrator to your AccuRoute Server in the LAN, you can:

  ‣ Monitor message processing

  ‣ Troubleshoot errors

  ‣ Manage the server connectors

  ‣ Modify the configuration of server components

  ‣ Manipulate rules for handling inbound and outbound messages

  ‣ Manage user permissions and feature access.

- **Automated self-maintenance** - You can manage the databases of the AccuRoute Server using the Maintenance component. You can configure the Cleanup feature of the Maintenance component to remove messages and billing entries from the message database after a specified length of time. You can also configure the Archive feature to copy messages to an archive database and remove the messages and the billing entries from the archive after a specified length of time.

- **Customized document workflow** - You can create rules to determine how the AccuRoute Server will process inbound and outbound messages. The rules are highly configurable and can be manipulated to achieve specific results.

- **Configurable user permissions and feature access** - You can create users and configure user permissions in the Omtool Server Administrator. The collection of user records determine the access privilege of each user to AccuRoute Desktop, Omtool Web Client, and Approval. (Approval is a configurable feature that results in a user's messages being reviewed or approved before they are sent.) The user default configuration applies globally to users who do not require special permissions or feature access.

Clients and specialized integrations

AccuRoute features are accessible where the users need them most—on desktops, the web, office machines, multifunction devices and business systems that are an integral part of the communication workflow.

AccuRoute includes desktop and intranet-based applications for:

- **Multifunction devices and business systems** - Omtool is a premier provider of software solutions complementing the hardware solutions offered by leading manufacturers of multifunction devices and business machines such as Hewlett Packard, Sun Microsystems and Ricoh Corporation, Sharp Electronics Corporation, and Xerox Corporation.

  This partnership has allowed Omtool to join the esteemed HP Platinum Partner Program in 2007. Omtool is also the winner of the Ricoh and Sun Java Solutions Developer Challenge in 2006. Omtool has also become a premier provider of software solutions that complement the hardware solutions offered by these highly successful companies with established global presence.

Note	AccuRoute Server v3.01 does not support HP Chai Device Client. If you are using Chai and are upgrading to AccuRoute v3.01, download HP® OXPd Device Client v1.4. For download, installation and configuration instructions, consult the HP OXP v1.4 installation and integration guide.

- **Document and records management systems** - AccuRoute integrates with leading document and records management solutions including

  CA MDY FileSurf, EMC® Documentum®, HP TRIM, Hyland® OnBase®, Autonomy iManage WorkSite, Open Text Document Management (formerly Hummingbird DM), Microsoft® SharePoint®, World Software WORLDOX®, Xerox® DocuShare, iManage RecordsManager, Iron Mountain Accutrac® and Open Text LegalKEY®.

Note	At the time of release, Open Text Document Management (formerly Hummingbird DM) did not support 64bit environments. The work around is to install a Remote DMS Connector and Remote AccuRoute Administrator for setup and configuration of this dms.

  Additionally, Omtool has developed unique systems for streamlined document routing: Omtool™ ObjectArchive™, FileShare, MyFolder, and Single Page Image Files.

- **Cost management systems** - AccuRoute integrates with Control Systems Copitrak®, Equitrac Professional® and nQueue® Billback iA Cost Recovery interfaces.

- **Litigation support systems** - AccuRoute can distribute documents to litigation support systems. For example: CT Summation, FTI$^®$ Ringtail™ and LexisNexis$^®$ Concordance$^®$.

For more information on these and other Omtool integrations, contact [Omtool Sales](#).

Deployment summary

To deploy AccuRoute Server:

1 Complete the installation requirements using the guidelines in [Section 2: Requirements](#) (2-1)

2 Install the AccuRoute Server using instructions in [Section 3: Installing the AccuRoute Server](#) (3-1)

3 Perform required configurations. For instructions, see [Post installation configurations](#) (4-1)

4 Set up Microsoft Exchange integration if required. For instructions, see [Section 5: Exchange integration](#) (5-1)

5 Set up Domino/Lotus Notes integration if required. For instructions, see [Section 6: Notes integration](#) (6-1)

6 Set up SMTP integration. For instructions, see [Section 7: SMTP integration](#) (7-1)

7 Set up other server-side related features such as:

  ‣ Remote Administrator

  ‣ Remote Composer

  ‣ Remote Modem Server

  ‣ Remote Embedded Directive Manager

  ‣ Remote AccuRoute Connector for DMS Libraries

  ‣ Remote AccuRoute Intelligent Device Client

  ‣ Object Archive

Additionally, you must set up the AccuRoute Web Client or the AccuRoute Desktop Client where registered users can create Embedded Directives. Consult the [AccuRoute v3.01 documentation](#) page which has links to AccuRoute Desktop, AccuRoute Web Client and all other related documentation for AccuRoute Server v3.01.

Use the Omtool Server Administrator to monitor system failures and to troubleshoot workload bottlenecks.

Related documentation

A complete list of related documentation is available online at: http://www.omtool.com/documentation/accuroute/v3.01/documentation.htm.

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 Server v3.01 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

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 64 bit, 2003 Standard Edition SP2 64 bit

❒   For Windows **2008** 64 bit, you require **IIS v7**. For configuration instructions, see Configuring IIS when installing AccuRoute Server on Windows 2008 systems.

❒   For Windows **2003** Standard Edition SP2 64 bit, you require **IIS v 6** with the following components: Common Files, Internet Information Services Manager, SMTP Service (for AccuRoute Connector for SMTP 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.

❒   Windows Active Directory - AccuRoute v3.01 can only be installed in Windows Active Directory environment. All server security and authentications are dependent on the Active Directory authentication.

❒   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 Disabling Internet Explorer Enhanced Security Configuration component (2-26)

❒   Microsoft .Net Framework 3.0 - this is required to install SQL Express 2005 and AccuRoute Connector for ExchangeX

❒   Configure IIS to run 32-bit applications - For instructions, see Configuring IIS to run 32-bit applications (2-9)

❒   Configure Microsoft.Net - this is only required if you are planning to install AccuRoute Web Client onto the same server system. For instructions, see Configuring Microsoft.Net (2-9)

❒   Exchange 2003 System Manager (for Microsoft Exchange Server integration only)

Important	Exchange Server 2003 does not run on 64 bit systems. Omtool has qualified this environment with the AccuRoute Connector for Exchange 2003 running remotely on a 32bit system within the environment.
	Exchange 2000 is no longer supported.

The AccuRoute Server and the Exchange server must be running the same version of this application. When updates and service packs are applied to the Exchange server, they must be applied to the AccuRoute Server also.

Important	For **Exchange 2010, 2007**, the Exchange server must have a Foreign Connector specified with FAX address type. For general information on Foreign Connector, see http://technet.microsoft.com/en-us/library/aa996779.aspx. For information on how to create a Foreign Connector, see http://technet.microsoft.com/en-us/library/aa996397.aspx. For information on "Set-ForeignConnector" cmdlet to modify an existing foreign connector, see http://technet.microsoft.com/en-us/library/bb123789.aspx.

❏   Notes v5.x / v6.x /v6.5 client (for Notes integration only)

Note	Do not run any other enterprise application on the AccuRoute Server system.

❏   Microsoft Internet Explorer 7

❏   Acrobat Reader 7.0 or later

❏   Internet connection

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 (10-1).

The Remote Composer must have one of the following applications along with Microsoft Word. For example, if you are planning to use Crystal Reports for compose, it must be installed on the compose server.

❏   Microsoft Visio 2007 for *.VSD and *.VDX message attachments.

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

❏   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.

❏   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. For more information on Routing Sheet templates, consult the AccuRoute Desktop installation guide. Go to Related documentation on 1-4.

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 DVD

- ❐ Omtool service account. For instructions on how to create the Omtool service account, see Creating Omtool service account (2-5)

- ❐ Windows user account that belongs to the local Administrators group. For instructions on how to create this group, see Creating AccuRoute Admins group (2-6)

- ❐ AccuRoute Server license key

- ❐ Windows installation DVD or access to the Windows setup on a network share

- ❐ Configuring DCOM. For instructions, see Configuring Distributed COM permissions (2-6)

- ❐ Configuring IIS on Windows 2008 system. For instructions, see Configuring IIS when installing AccuRoute Server on Windows 2008 systems (2-8)

- ❐ Configuring Omtool service account for Exchange.

Note	This is required only if you are integrating with Exchange environment.

For instructions, see Configuring Omtool service account permissions for Exchange (2-13). If you have an Exchange Virtual server, see Configuring Omtool service account permissions for an Exchange Virtual Server (2-15)

❐   Installing MS SQL application. For instructions, see <u>Installing a Microsoft SQL application on the AccuRoute Server</u> (2-16)

❐   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: <u>The modem installation and configuration guide</u>.

❐   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 <u>Enabling 8.3 Name Creation on NTFS Partitions</u> (2-27).

Optionally, you can turn Windows firewall off. Turning the firewall off will allow exceptions for the mmc.exe and the DCOM port (135).

•   If you do not wish to turn the Windows firewall off, keep the firewall on and allow the DCOM port (135) and mmc.exe.

•   If the firewall is on, and you do not allow the DCOM port (135) and mmc.exe, 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.`

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   Run dcomcnfg. The **Component Services** console opens.

3   Go to the console root, expand **COMPONENT SERVICES**.

4   Expand **COMPUTERS**. Go to the details pane, right-click **MY COMPUTER**, select **PROPERTIES**. The Properties page opens.

5   Go to **COM SECURITY**.

6   Configure access permissions:

   a   Go to the **Access Permissions** section.

   b   Click **EDIT DEFAULT**. The **Access Permission** page opens.

   c   Verify that the Omtool service account user has **Local Access** and **Remote Access** permissions enabled. If necessary, add this group to the list.

   d   Verify that the AccuRoute Admins group has **Local Access** and **Remote Access** permissions enabled. If necessary, add this group to the list.

   e   Verify that INTERACTIVE and SYSTEM have **Local Access** and **Remote Access** permissions enabled. If necessary, add these groups to the list.

   f   Click **OK**.

7   Configure launch permissions:

   a   Go to **Launch and Activation Permissions** section.

   b   Click **EDIT DEFAULT**. The **Launch Permission** page opens.

   c   Verify that the Omtool service account user has **Local Launch**, **Remote Launch**, **Local Activation** and **Remote Activation** permissions enabled. If necessary, add this group to the list.

   d   Verify that the AccuRoute Admins group has **Local Launch**, **Remote Launch**, **Local Activation** and **Remote Activation** permissions enabled. If necessary, add this group to the list.

   e   Verify that INTERACTIVE and SYSTEM have has **Local Launch**, **Remote Launch**, **Local Activation** and **Remote Activation** permissions enabled. If necessary, add these groups to the list.

   f   Click **OK**.

8   Click **APPLY**, **OK**, and right click **MY COMPUTER** in **Component Services**.

9   Select **STOP MS DTC**, then select **START MSDTC**.

10   Close **Component Services**.

Required COM permissions for remote AccuRoute Intelligent Device Client

When performing a typical AccuRoute Server installation, the AccuRoute Intelligent Device Client is installed by default. No separate installation of the client is necessary. For custom installations, the installer can un-check the AccuRoute Intelligent Device Client option from the list of components to install.

If you 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.

Configuring IIS when installing AccuRoute Server on Windows 2008 systems

To use AccuRoute Intelligent Device client on a Windows 2008 system, you have to add role services.

To add role services:

1   Log on to the system where AccuRoute Server is being installed using an account that belongs to the local Administrators group.

2   Click **START > ALL PROGRAMS > ADMINISTRATIVE TOOLS > SERVER MANAGER** to open the **Server Manager** console.

3   Click **ROLES**, then under the **Web Server (IIS)** section, click **ADD ROLE SERVICES** in the details pane.

        The **ADD ROLE SERVICES** page opens.

4   At the top level check off the following:

●   **COMMON HTTP FEATURES (INSTALLED)**. Check all options underneath this option.

●   **APPLICATION DEVELOPMENT**. Check all options underneath this option.

●   **SECURITY (INSTALLED)**. Check all options underneath this option.

●   **MANAGEMENT TOOLS (INSTALLED)**. Check all options underneath this option.

5   Click **NEXT**, then **INSTALL**.

6   Close the page when installation is complete.

7   Click **FEATURES** and then click **ADD FEATURES** in the details pane. The **Add Features** page opens.

8   Check the following option: **SMTP SERVER**

9   Click **NEXT** and then click **INSTALL**.

10   Close the page when installation is complete.

Configuring IIS to run 32-bit applications

To configure IIS to run 32 bit applications:

1   Open a command prompt, and enter:

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

2   Press **ENTER**.

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

Configuring Microsoft.Net

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   This registration in only required for installing the AccuRoute Web Client.

Enabling 32-Bit ASP.NET

Important　　This configuration is required for Device Manager and/or AccuRoute Web Client installing on Windows 2008 system where AccuRoute Server is also installed.

In addition, you must also disable UAC permissions. For instructions, see Disabling UAC permissions (2-10).

To enable 32-Bit ASP.NET

1　　Right click **MY COMPUTER** and select **MANAGE**.

2　　Navigate to **ROLES>>WEB SERVER (IIS)>>INTERNET INFORMATION SERVICES (IIS) MANAGER**.

3　　In the **CONNECTIONS** pane, select system name and click on **APPLICATION POOLS**.

4　　In **ACTIONS** pane click on "**SET APPLICATION POOL DEFAULTS…**".

5　　In the **Application Pool Defaults** page, set **ENABLE 32-BIT APPLICATIONS** to `True`.

6　　Click **OK** to save your changes.

Disabling UAC permissions

Important　　This configuration is required for Device Manager and/or AccuRoute Web Client installing on Windows 2008 R2/Windows 2008 systems where the AccuRoute Server is also installed.

If you plan to use the Device Manager or use AccuRoute Web Client v3.01 on a Windows 2008 R2/Windows 2008 system where the AccuRoute Server is also installed, you must disable UAC before installing AccuRoute Web Client. In addition, you must also enable 32 Bit ASP.NET. For instructions, see Enabling 32-Bit ASP.NET (2-10).

Windows 2008 R2

To disable UAC:

1　　In the system where AccuRoute Server will be installed, open the **Control Panel** and go to **User Accounts**.

2　　Click **CHANGE USER ACCOUNT CONTROL SETTINGS**.

3　　Move the slider down to **NEVER NOTIFY**.

4　　Click **OK** to save your changes.

Windows 2008

To disable UAC:

1   In the system where AccuRoute Server will be installed, open the **Control Panel** and go to **User Accounts**.

2   Select **TURN USER ACCOUNT ON OR OFF** option.

3   In the page that opens, un-check the **USE USER ACCOUNT (UAC) TO HELP PROTECT YOUR COMPUTER** option.

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

5   Restart your system so that the changes you made take effect.

Enabling Integrated Windows Authentication

Note	This registration in only required for installing the AccuRoute Web Client.

AccuRoute Web Client authenticates users based on their Windows logon credentials. The logon credentials are either passed transparently from the client to the web server or entered manually by the user at the beginning of each session. The login method depends on how authentication is configured; both methods are described in the configuration instructions.

Note	Windows authentication is required with NTLM authentication. Skip this section for database authentication or Notes authentication.

Configure Windows authentication on the web server and then configure Internet Explorer on clients.

Configuring the Web Server

To configure Integrated Windows Authentication on the Web Server:

1   Click **START > ALL PROGRAMS > ADMINISTRATIVE TOOLS > INTERNET INFORMATION SERVICES (IIS) MANAGER**.

2   Expand the server running AccuRoute Web Client. Expand **SITES** and then expand **DEFAULT WEB SITE**.

3   Click the virtual directory for AccuRoute Web Client. (The default name is `OmtoolARWeb`.) The Internet Information Services features view opens in the details pane.
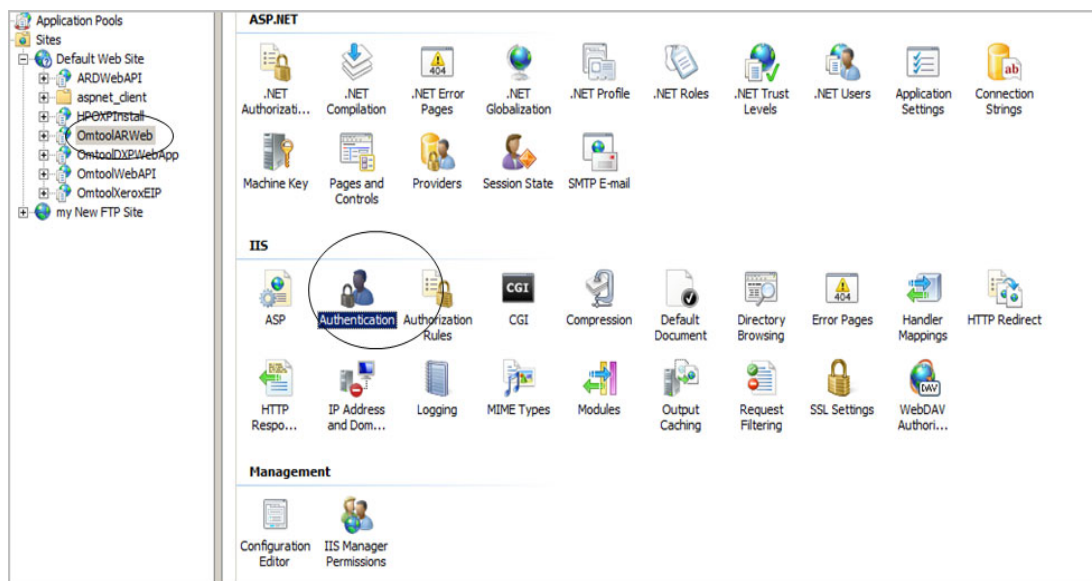
4   In the **IIS** section, click **AUTHENTICATION**. The following page opens.

5   Verify the **ANONYMOUS AUTHENTICATION** option is disabled. If not disable the option.

6   Verify the **WINDOWS AUTHENTICATION** option is enabled. If not, enable the option.

7   Perform an iisreset.

   a   Open a command prompt.

   b   Type `iisreset`.

8   Press **ENTER**.

Configuring Omtool service account permissions for Exchange

The AccuRoute Connector for Exchange on the AccuRoute Server is a gateway to Exchange, and the Omtool service account (the logon account for the Omtool Connector Manager service) must have specific permissions. The procedure for configuring these permissions varies based on the version of the Exchange server.

Exchange 2010, 2007

For Exchange 2010, 2007, permission is needed is access to the drop directory when creating the AccuRoute Connector for Exchange. For more information on the drop directory, consult Microsoft documentation in http://technet.microsoft.com/en-us/library/aa996779.aspx.

Exchange 2003

Note	If you are installing the AccuRoute Server on a Windows 2003 64 bit system, you must first install and configure the Exchange 2003 System Manager on a remote 32 bit system. Exchange 2003 does not run on 64 bit systems.

Configuring Exchange System Manager permissions

In the Exchange System Manager, the **ShowSecurityPage** to be turned on. For instructions, consult the Microsoft Knowledge Base Article [How to enable the Security tab for the organization object in Exchange 2000 and in Exchange 2003](#).

Configuring permissions for the Omtool service account

The Exchange Administrator must assign to the Omtool service account the role of Exchange Administrator View Only at the Exchange Organization Level. Omtool service account needs this permission in order to open the Exchange System Manager in the system running the AccuRoute Server.

To assign the Role of Exchange Administrator View only:

1   Login to the system running Exchange System Manager using the login credentials of the Exchange Administrator.

2   Click **START > ALL PROGRAMS > MICROSOFT EXCHANGE > SYSTEM MANAGER**.

3   Right click the **EXCHANGE ORGANIZATION LEVEL**.

4	Right click and select **DELEGATE CONTROL** from the drop down menu. The **Exchange Administration Delegation** wizards opens.
5	Click **NEXT**.
6	On **Users or Groups** page, click **ADD**.
7	In the **Delegate Control** page that opens, click **BROWSE**.
8	In the **Select Users, Computers or Groups** page, browse and select the appropriate user whom you want to add.
9	Click **OK**.
10	Under **Roles in the Delegate Control** page, click one of the following administrative permissions: **EXCHANGE FULL ADMINISTRATOR** or **EXCHANGE ADMINISTRATOR**.

The users added are listed in the group.

Configuring permissions to access the mailbox store

To configure permissions for the Omtool service account to access the Exchange mailbox store:

1	Go to any system where Exchange System Manager is installed and log in using a Windows user account that is assigned the Exchange Full Administrator role.
2	Start System Manager and go to **Administrative Groups > First Administrative Group > Servers > [server] > First Storage Group**.
3	Right-click **MAILBOX STORE** and select **PROPERTIES**.
4	Go to the **Security** tab.
5	Add the Omtool service account user with **Full Control** permission enabled.
6	Click **APPLY** and then click **OK**.

Configuring permissions for Routing group

The Omtool service account user must also have Full Control permissions of the Routing Group (requires ShowSecurityPage). This permission is necessary without which the user cannot create AccuRoute Connector for Exchange.

Configuring Active Directory permissions

When you configure the permissions for Exchange 2003 as listed in the sections above, the **Assign DID** and **Assign Profil**e features of the AccuRoute Connector for Exchange will not work if you are logged in as the Omtool service account user.

To use the **Assign DID** and **Assign Profil**e features, you can do one of the following:

- Login as a Domain Admin and use the features.

- Give the Genifax account the permissions to read and write PROPERTIES (not just objects) in ADSI edit to the container the users are in like the domain admin has.

Exchange 5.5

Microsoft has discontinued support for 5.5 and as a result Omtool can no long qualify it with the current shipping version. You will need to contact Omtool Sales for a quote to qualify this solution and also purchase per incident support from Microsoft to support us with this qualification.

To contact Omtool Sales, email at sales@omtool.com.

Configuring Omtool service account permissions for an Exchange Virtual Server

For an environment with clustered Exchange servers, the Omtool service account requires permissions to access the Exchange Virtual Server.

Note	This procedure must be completed before the AccuRoute Server is installed. If the AccuRoute Server has been installed, consult Knowledgebase article K03225 for information on deleting the AccuRoute Connector for Exchange in Omtool Server Administrator and then removing the Genifax mailbox from Exchange System Manager or Exchange Administrator. (Go to Omtool Support and Sales on the inside front cover.)

Important	You need to configure permissions to access the Exchange Virtual Server for Exchange 2003 only. No configuration is needed for Exchange 2007.

To give the Omtool service account permissions to access the Exchange Virtual Server:

1   Go to any system where Cluster Administrator is installed and log in using a Windows user account that belongs to the local Administrators group.

2   Start Cluster Administrator.

3   Right-click the virtual server node in the console tree and select **PROPERTIES**.

4   Go to the **Security** tab.

5   Add the Omtool service account user with **Full Control** permission enabled.

6   Click **OK**.

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.

Important	Microsoft SQL 2000 is no longer supported. If you are using SQL 2000, Omtool requires that you upgrade to SQL 2005/2008 or SQL Express 2008 prior to upgrading your AccuRoute Server.

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

Use one of the following SQL database application.

- **SQL Express 2008** - This limited Microsoft SQL database application provides the basic database services the AccuRoute Server needs to maintain its SQL databases. It is licensed as part of the AccuRoute installation, and it is included on the AccuRoute installation DVD. For installation instructions, see (Installing SQL Express 2008, 2-16).

Important	SQL Express installation requires Microsoft .NET Framework 3.0

- **SQL Server 2005/2008** - 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. (Go to Installing SQL Server 2005 or 2008 on 2-26.)

Installing SQL Express 2008

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

You must have administrative rights on the system where you will install SQL Express 2008. We recommend that you read the Microsoft SQL Server 2008 Release Notes and Readme in its entirety before installing SQL Server 2008 Express.

Requirements:

Prior to installing SQL Express 2008, you may be required to apply the following:

- Microsoft .Net Framework 3.5 SP1 on your system
- Windows Installer 4.5 on your system

To install SQL Express 2008:

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

2 Insert the AccuRoute Server installation DVD into a DVD-ROM drive, or go to a network copy of the AccuRoute Server setup.

3 Go to \Tools\SQLExpress2008 and run **SQLEXPR_x64_ENU.EXE**. The setup extracts the files and then shows the **SQL Server Installation Center** page.

4 Read carefully all the contents of the page. Then click **INSTALLATION** on the left pane. The following page opens.
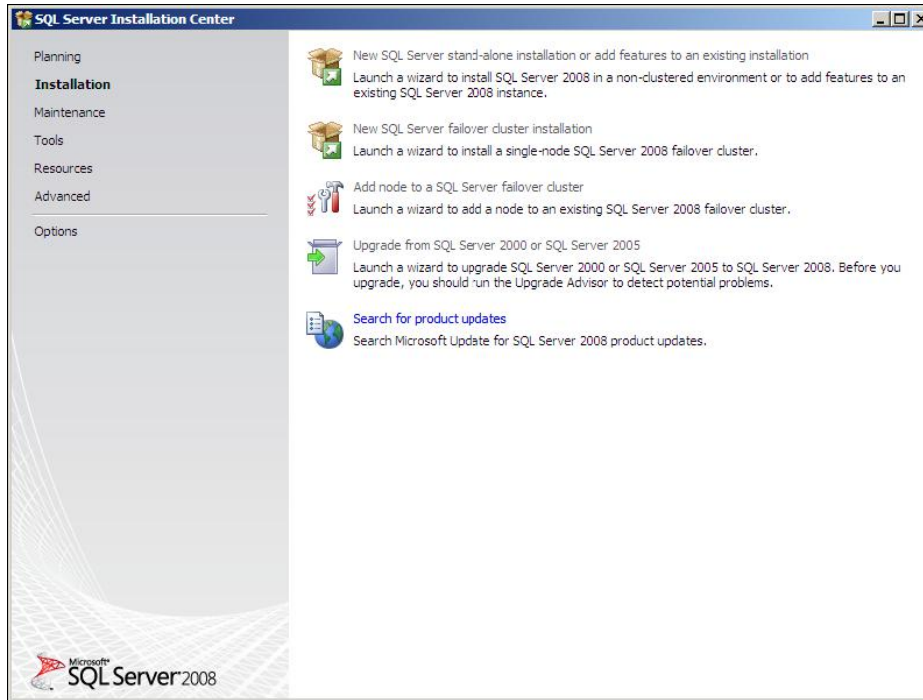
5 Click the **NEW SQL SERVER STANDALONE INSTALLATION OR ADD FEATURES TO AN EXISTING INSTALLATION** option. The setup automatically does a configuration check and shows the result.
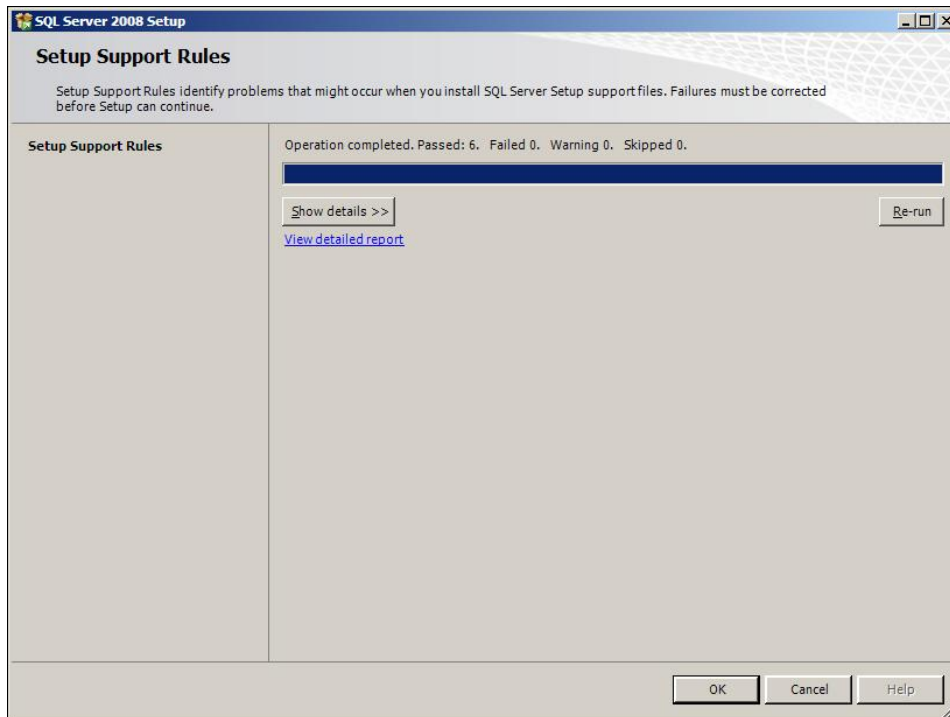
6   Click **OK**. The **Product Key** page opens.
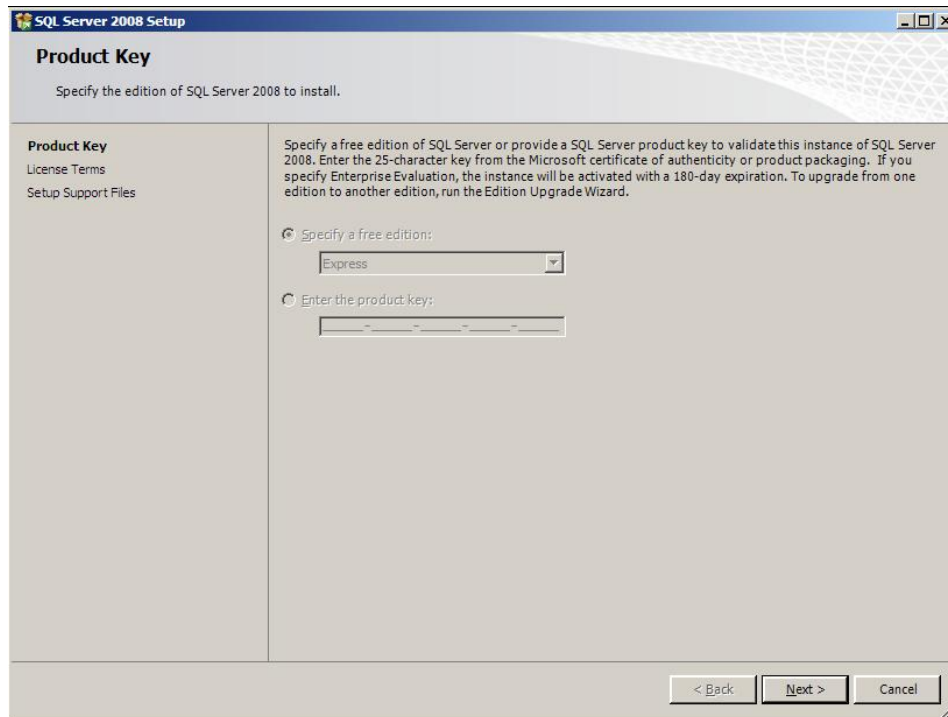
7   Click **NEXT**.
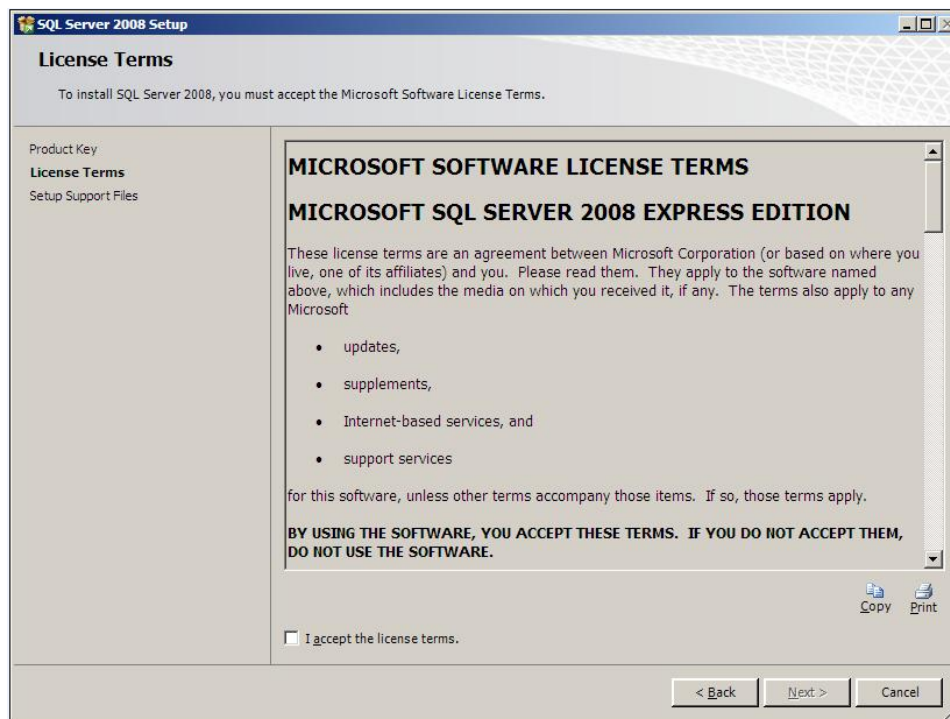
8   Check the box beside **I ACCEPT THE LICENSE TERMS** option and click **NEXT**.

9   The setup checks and prompts to install the required support files.
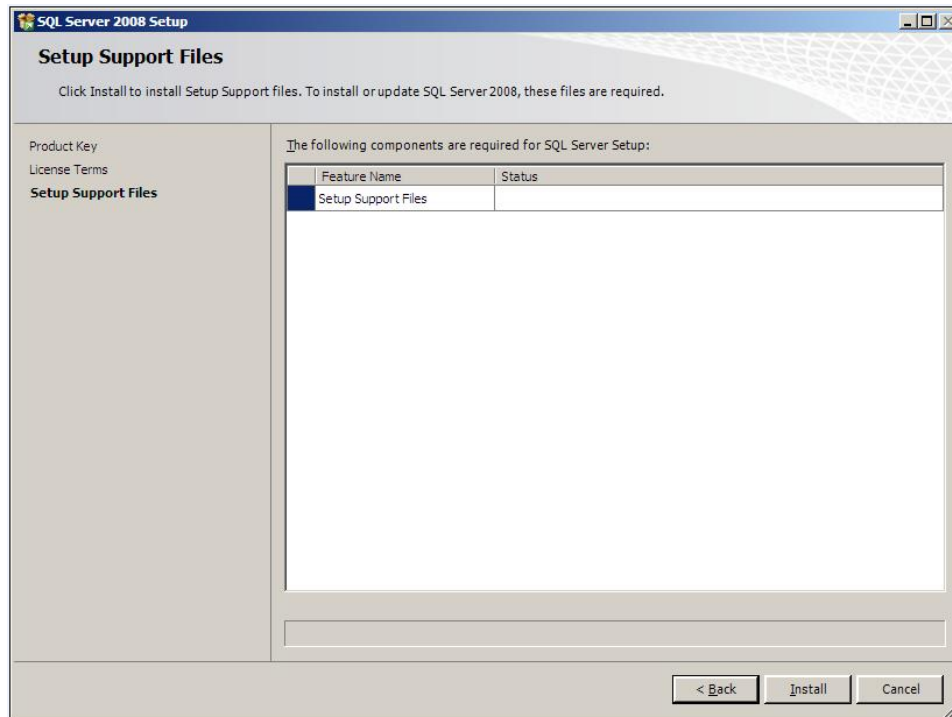
10   Click Install to install the required files.
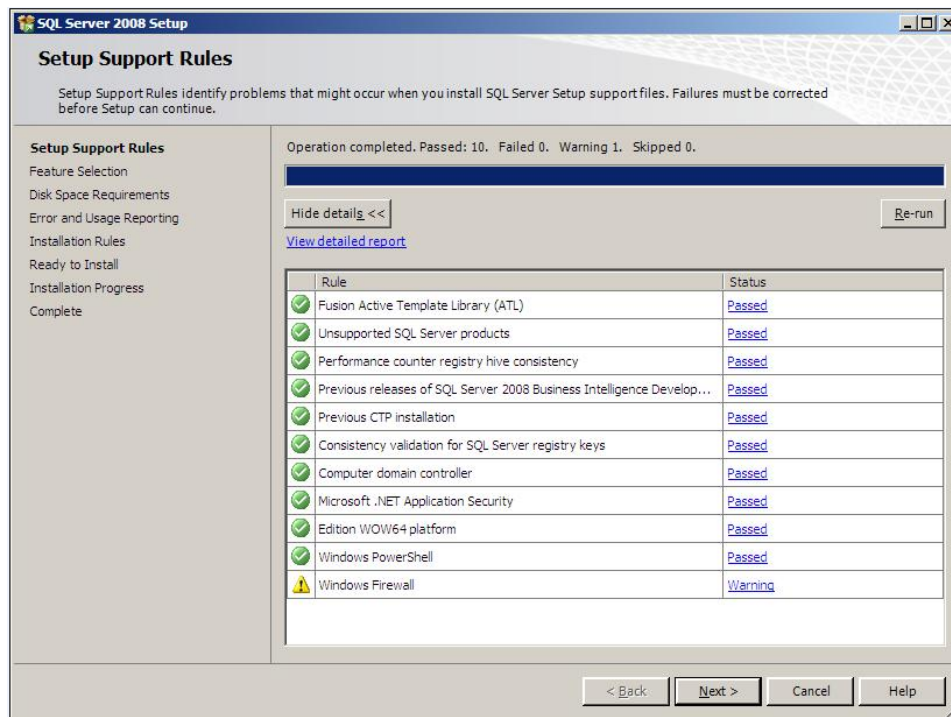
11   Click **NEXT**. The setup checks the **Database Engine Services**.
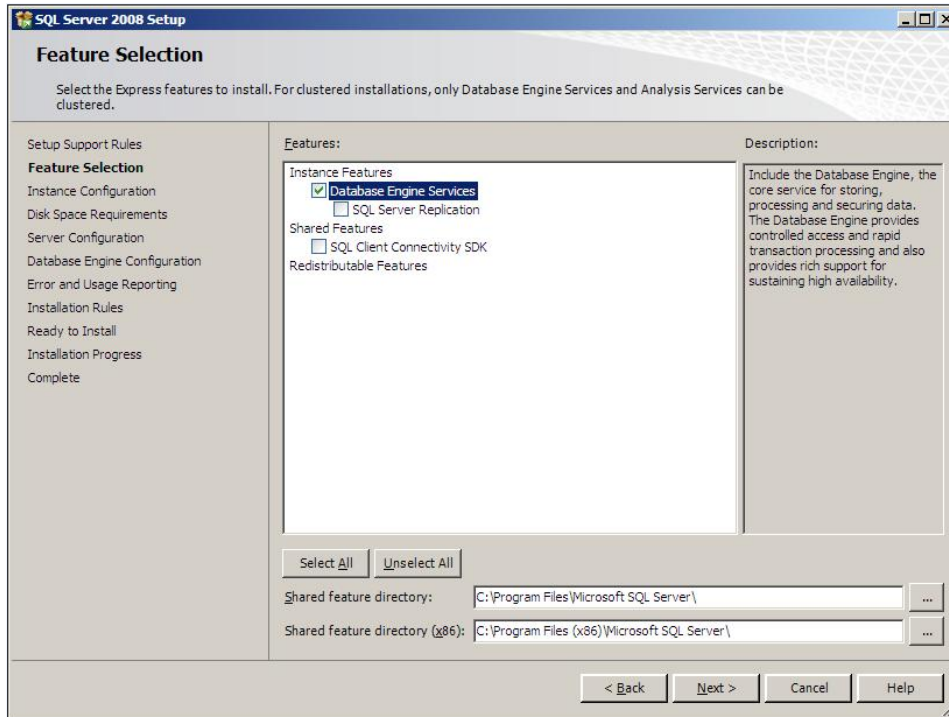
12   Clicks **NEXT**. The **Instance Configuration** page opens.
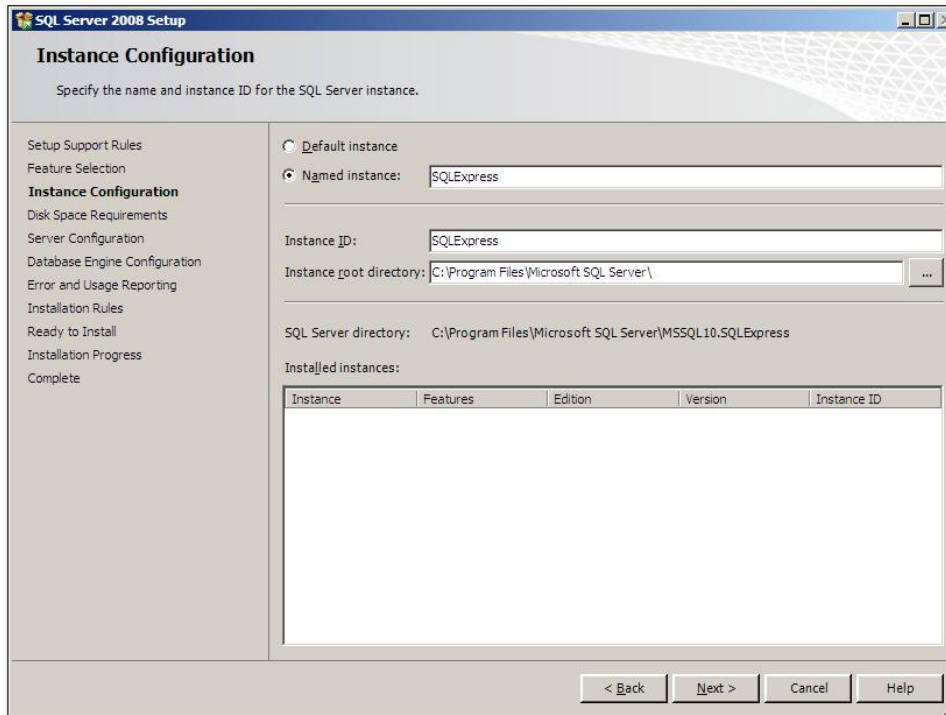
13   Keep the defaults and click **NEXT**. The **Disk Space Requirements** page opens.
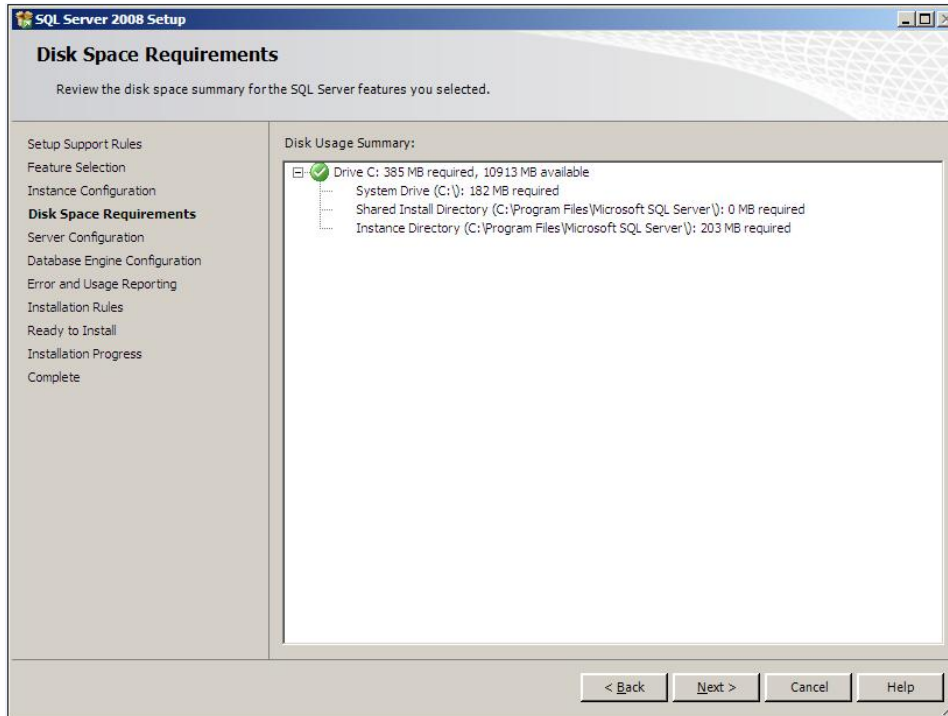
14   Verify you meet the space requirements. Click **NEXT**. The **Server Configuration** page opens.
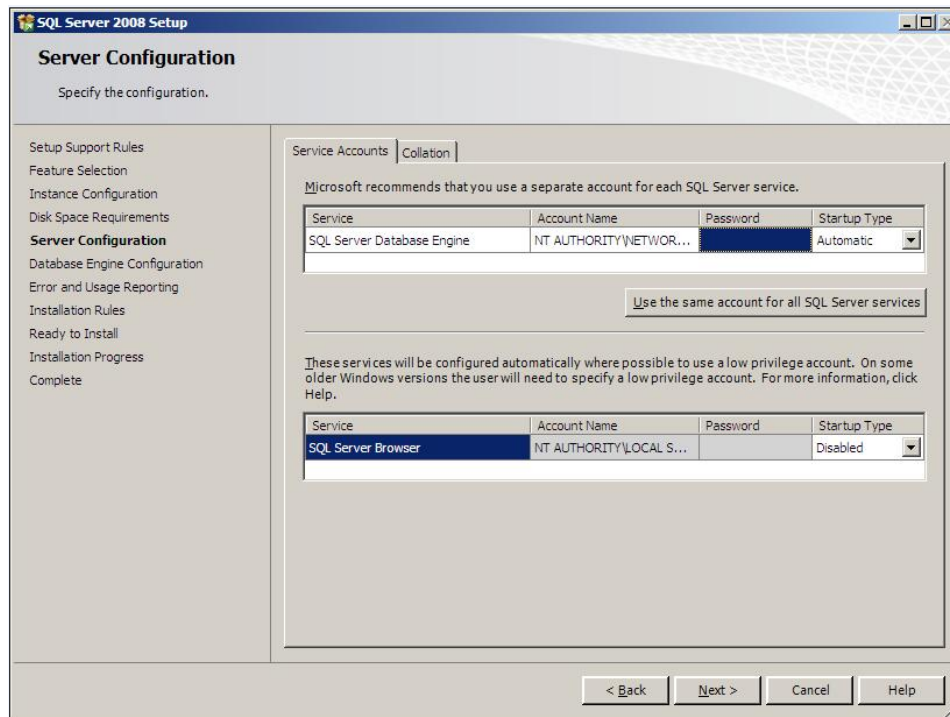
15   Select an account for the SQL service, for example the built in Network Service account. Click **NEXT**. The **Database Engine Configuration** page opens.

16   Click **ADD CURRENT USER** and specify an Administrator.
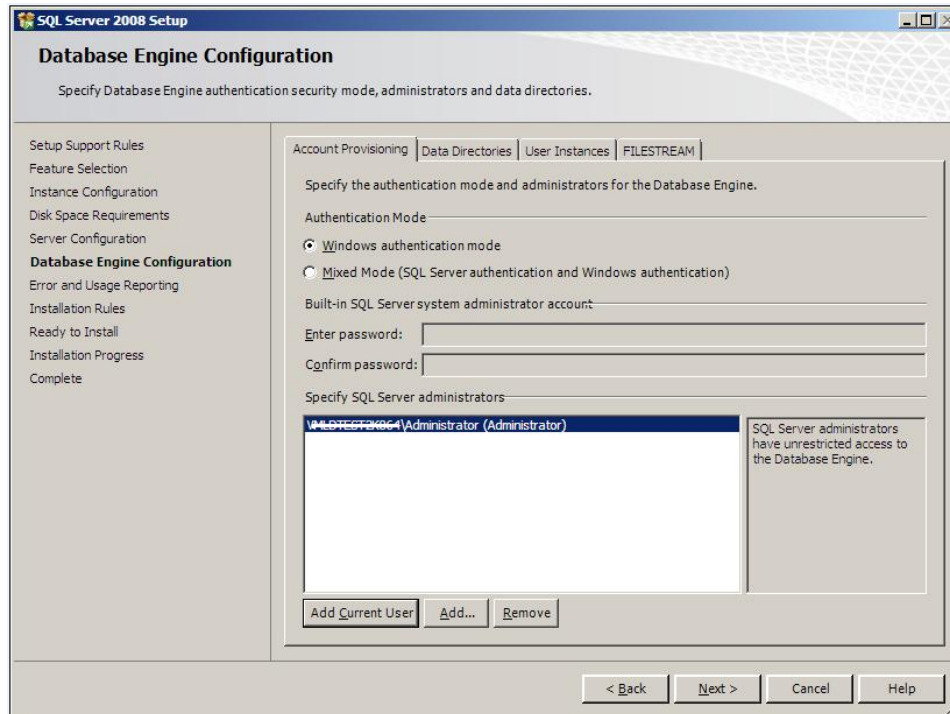
17   Click **NEXT**. The **Error and Usage Reporting** page opens.
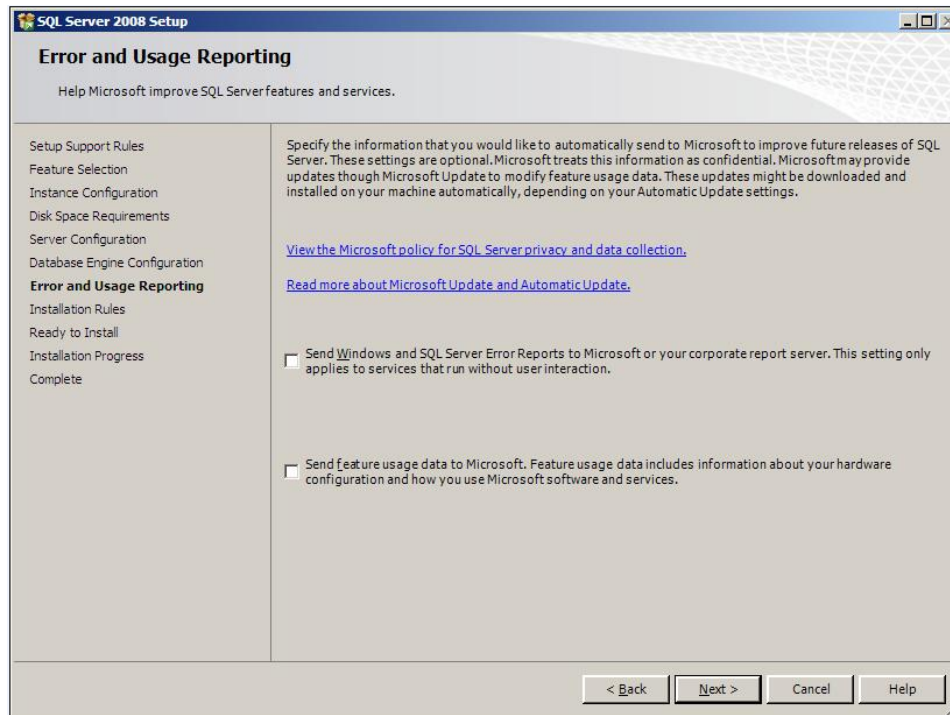
18 Click **NEXT**. The **Installation Rules** page opens.
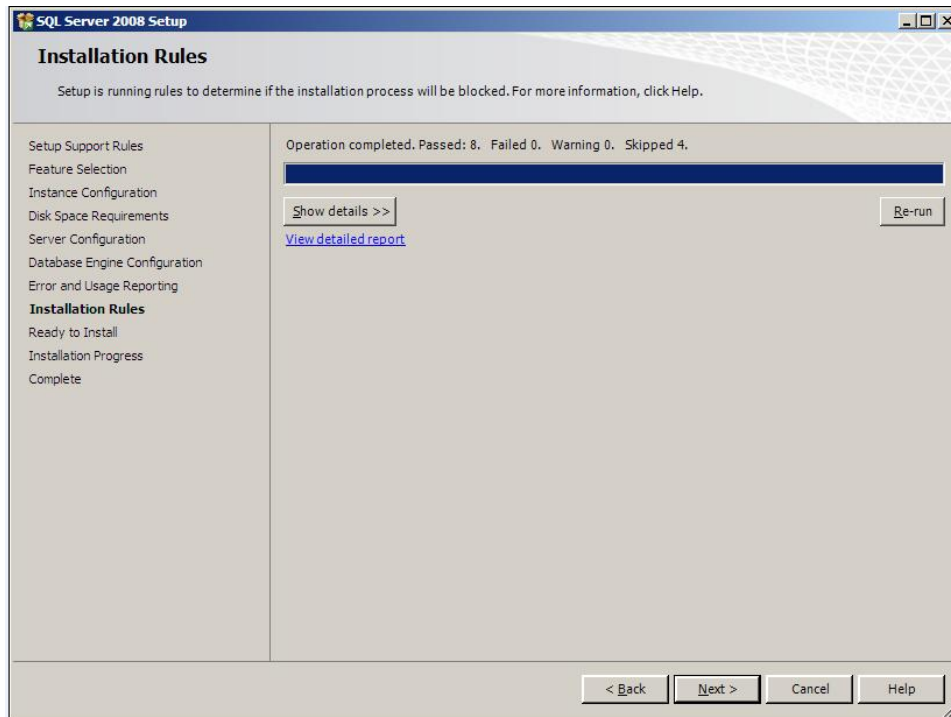
19 Click **NEXT**. The **Ready to Install** page opens.
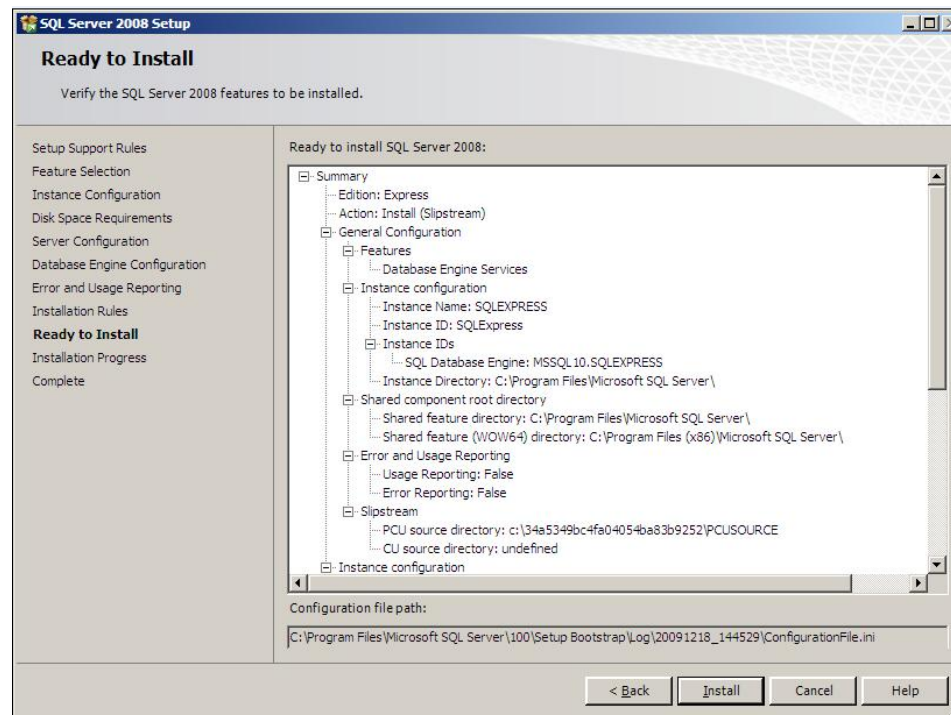
20 Click **INSTALL** to start the installation. The setup shows the installation progress.
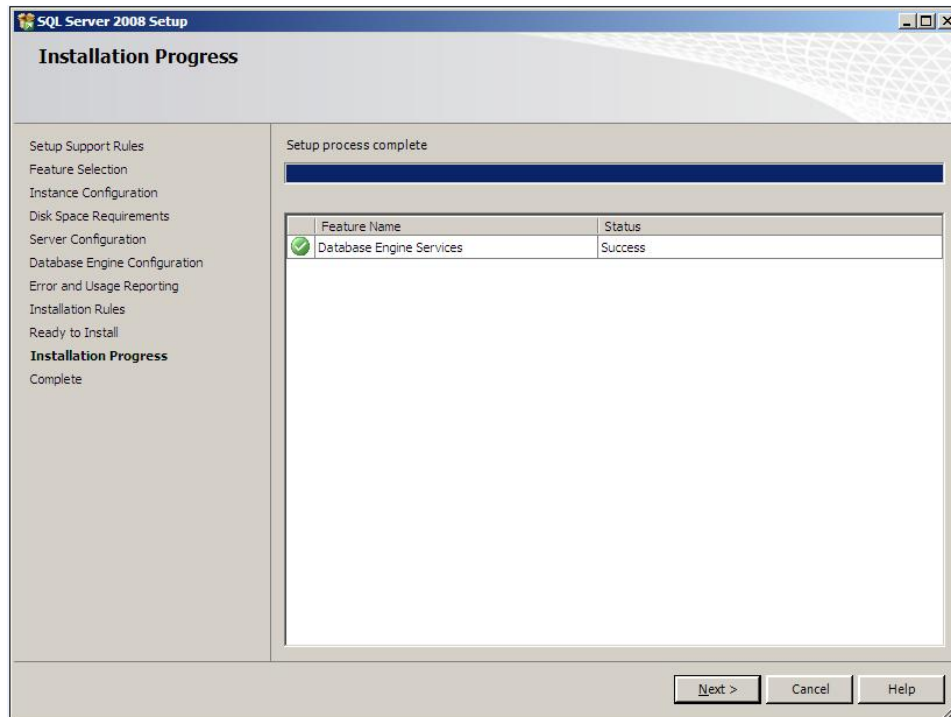
21 When installation is complete, the **Complete** page opens.
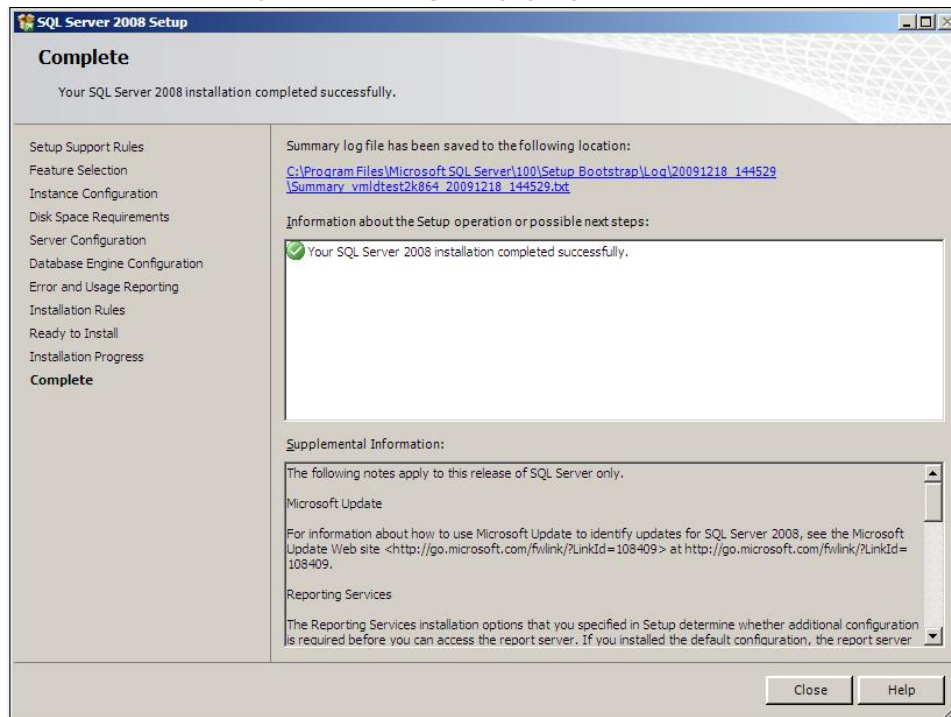
22 Click **CLOSE** to close the installation wizard.

Installing SQL Server 2005 or 2008

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

Disabling Internet Explorer Enhanced Security Configuration component

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.

For Windows 2008 R2

Follow the instructions in the procedure below to disable Internet Explorer Enhanced Security Configuration for all users.

To disable Internet Explorer Enhanced Security Configuration:

1   Close all instances of Internet Explorer.

2   Click **START > ADMINISTRATIVE TOOLS > SERVER MANAGER**.

3   If a **User Account Control** dialog box appears, click **CONTINUE**.

Note   See also, steps for Disabling UAC permissions (2-10).

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4   In the left pane, select **SERVER MANAGER**.

5   In the right pane under **Server Summary**, click **CONFIGURE IE ESC**.

6   Under **Administrators**, click **OFF**.

7   Under **Users**, click **OFF**.

8   Click **OK**.

9   Reboot you system before proceeding with the installation.

For Windows 2003 Standard Edition SP2

Verify that Internet Explorer Enhanced Security Configuration is disabled following the instructions below.

To verify that 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

Before you start installing the AccuRoute Server, review and verify that you have met all the pre-requisites. (Go to Requirements on 2-1.)

If you are setting up an AccuRoute Server cluster, review the AccuRoute cluster setup instructions (Go to Appendix A: Setting up an AccuRoute Server cluster)before beginning the AccuRoute Server installation.

Note about CPU core count capability

The AccuRoute Server is now hard-licensed to CPU core count (that is, the server license has a built-in CPU core count capability). This capability will not allow you to install the server on a machine that has more core counts than the license allows. If the system has a higher CPU 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 the product on a system with up to four (4) CPU cores. Anything larger than four CPU cores will need to go to an eight (8) core license. Anything larger will need a Data Center Server license. The Data Center Server license will support hardware with sixteen (16) or more CPU cores.

Important	The AccuRoute installation will not continue without the proper license.

Installing the 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.

If the AccuRoute Server is being used to create an AccuRoute Server cluster, review the setup procedure for an AccuRoute Server cluster before installing the AccuRoute Server. For more information, go to Appendix A: Setting up an AccuRoute Server cluster

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Note   During installation, if .NET 3.0 is not found by the installation check, it is automatically installed. The AccuRoute Server installation screens will show only after .NET 3.0 installation is complete.

If you are installing AccuRoute Server on a 64 bit system, see Note about registry keys location when installing AccuRoute Server on a 64 bit machine (3-10) after installation is complete.

To install AccuRoute 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 DVD into a DVD-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.
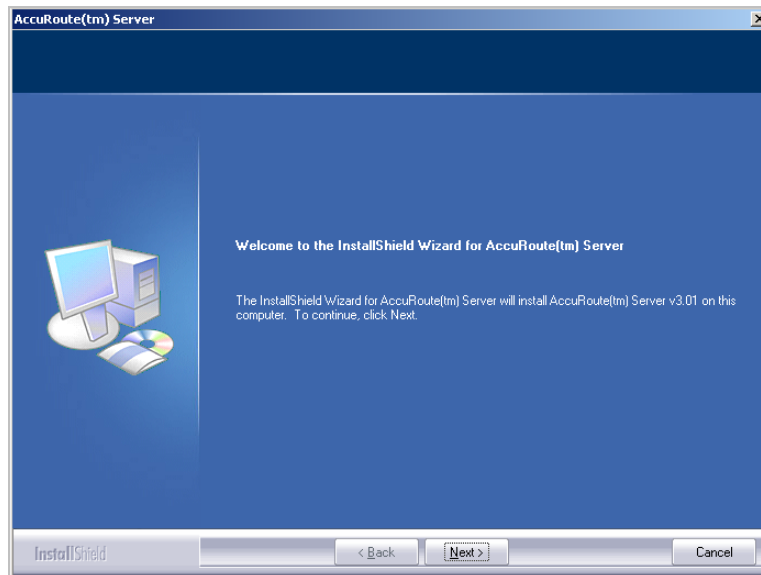
3   Click **NEXT**. The setup shows the license agreement page.

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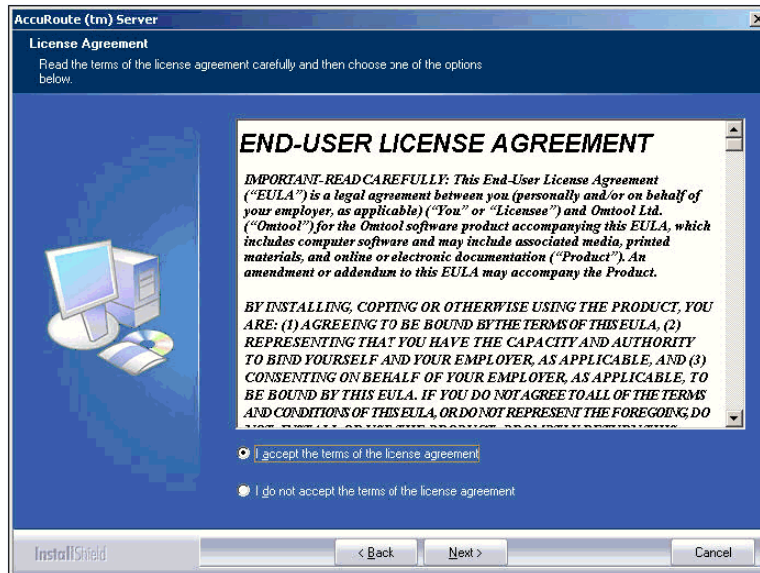
5 Click **NEXT**. The setup shows the installation options.
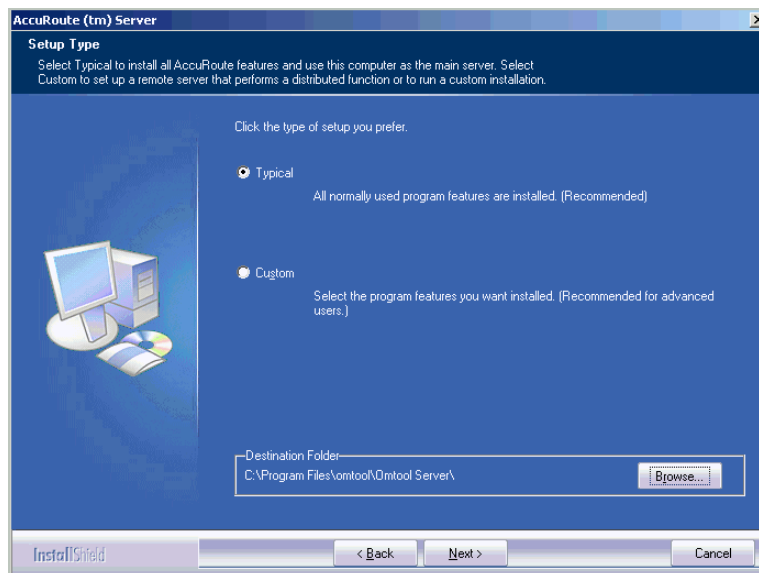
Note The default destination folder is **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER**\
You can change the destination if necessary by clicking **BROWSE** and then browsing to the desired location.
However, you cannot install the server on the root of a drive, for example, C:\

6 Select one of the following:

‣ **TYPICAL** for an installation that does not support faxing

▸ **CUSTOM** and then select your custom options

If you selected **CUSTOM**, select options for the AccuRoute Server installation and click **NEXT**. The following features must **always** be selected:

- ▲ Message Server
- ▲ Connector Package
- ▲ Component Package
- ▲ Omtool Server Administrator

Important   Select Modem Server option to support faxing with a local Modem Server.

Important   ObjectArchive is only supported when installed system remote from AccuRoute Server. Go to Section 8: Installing ObjectArchive. for more information.

ObjectArchive is not cluster aware.

The setup requests a license key.
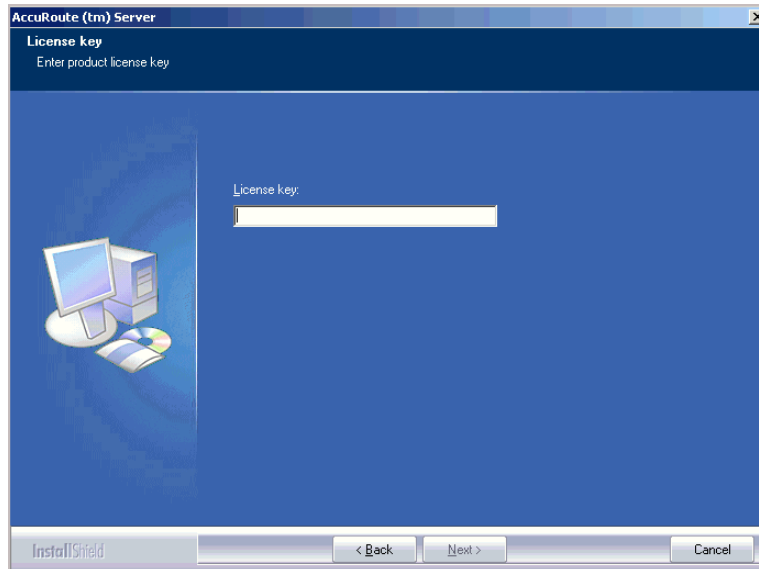
7   In the **LICENSE** text box, enter a valid license key and click **NEXT**. The setup checks the system for installation requirements and displays the results.
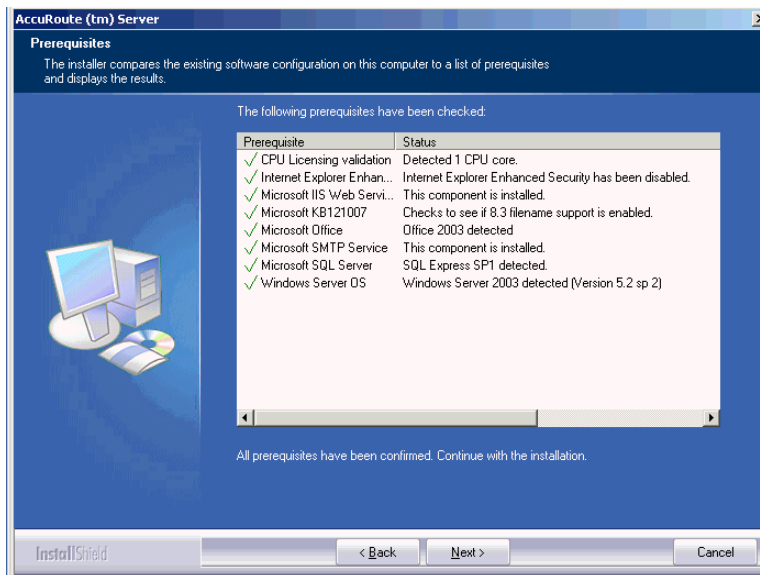
8   Review the results and perform one of the following listed actions.

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.
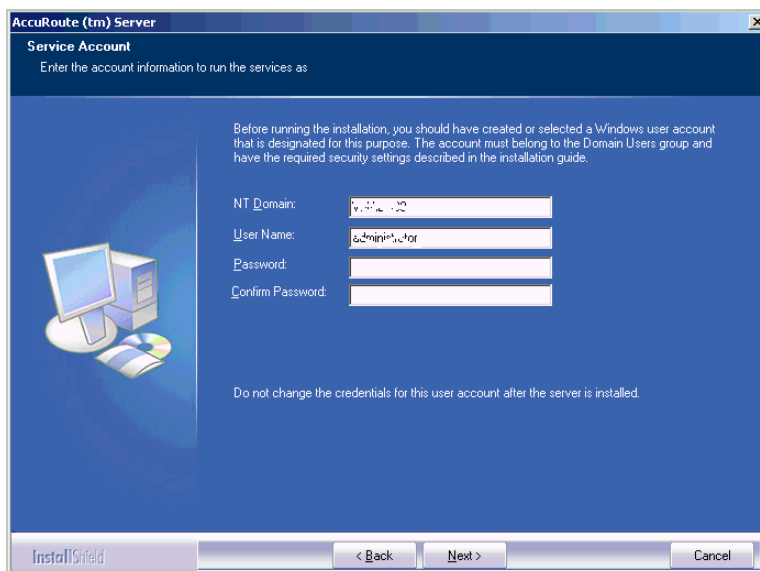
9 Provide the logon credentials of the Omtool service account.

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.
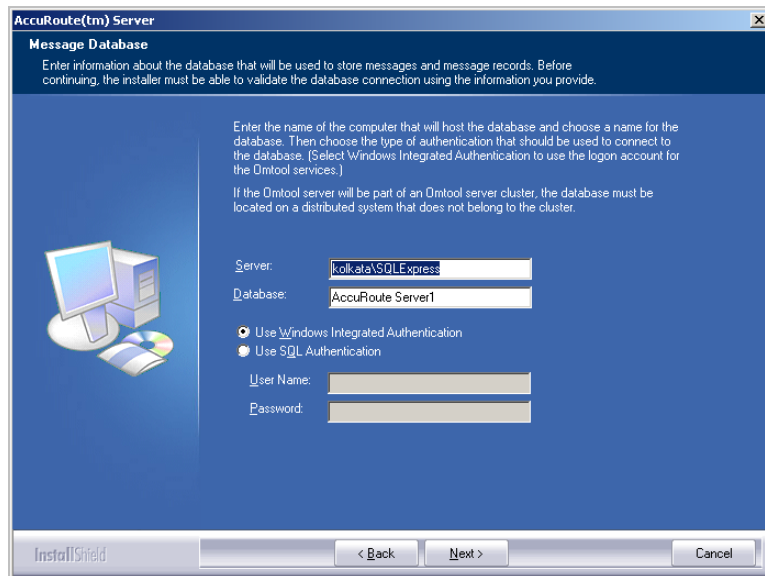
10 Complete the database configuration:

a If the setup detects **Microsoft SQL Server 2008 Express Edition**, verify that the **SERVER** field is populated with the name of the server running the Microsoft SQL Server database application and that `\SQLExpress` is appended to the server name.

If the setup detects **SQL Server 2008 or 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.

Note   Special instructions apply to AccuRoute Server clusters. For the first server being set up, enter the name of the database server. For the second server being set up, allow the setup to create a local database. (The second server is configured to use the database server so the local database is not used.) For more information, go to Appendix A: Setting up an AccuRoute Server cluster.

b 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\OMTOOLSERVER\DATABASE.

---

    c   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.

11   Click **NEXT**. The setup validates the connection to the database and displays installation settings.
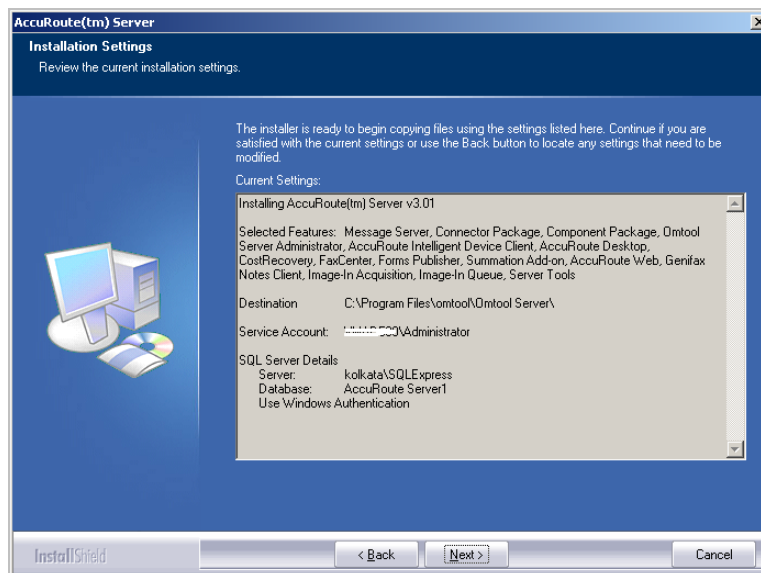
12   Review the installation settings.

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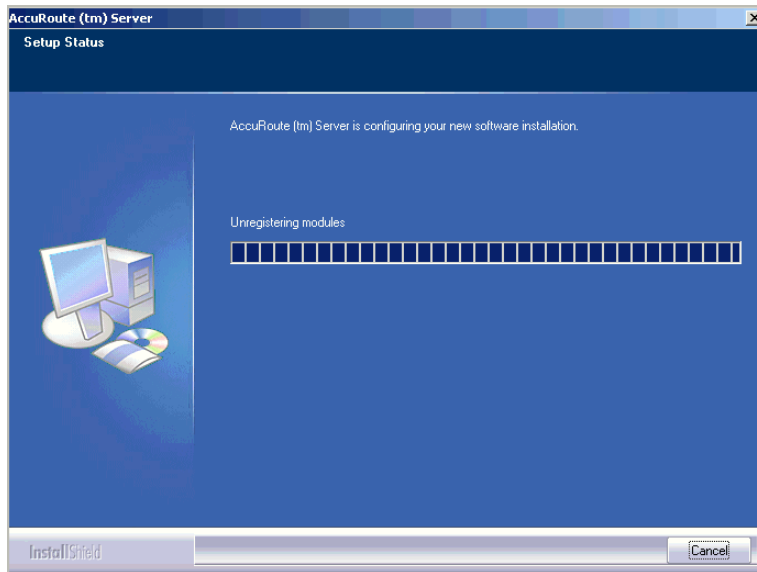
When installation is complete, the setup displays the following message.
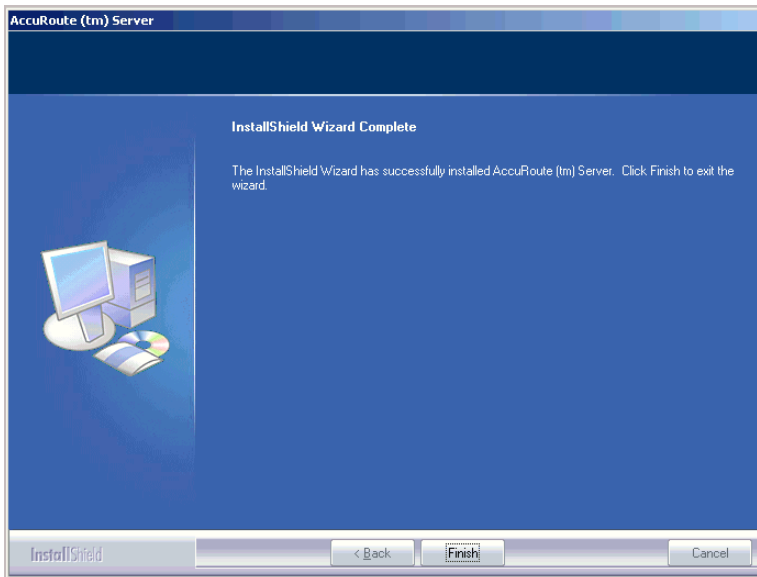
14   Click **FINISH**. The setup launches the server configuration wizard.

15   Continue to <u>Configuring the server configuration wizard</u>.

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.

---

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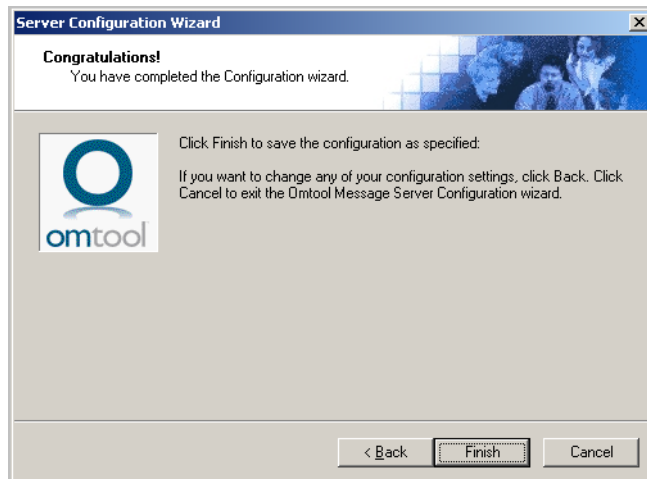
3   Click **FINISH** to close the wizard.

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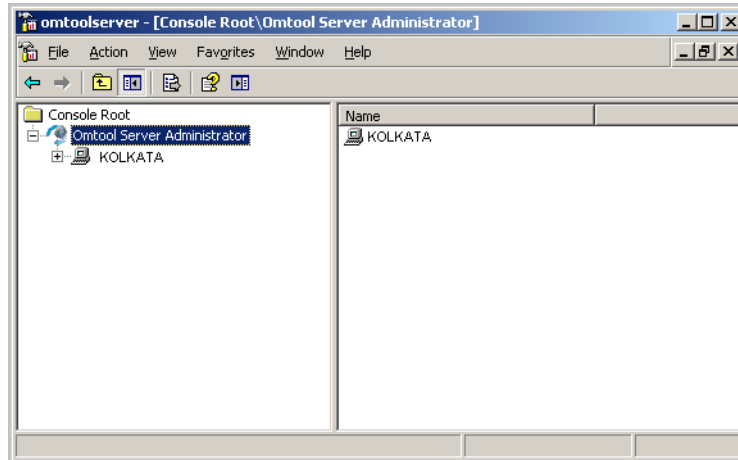
When Omtool Server Administrator is closed, Microsoft Management Console displays a message about saving changes to the MSC file. This file records the current position of items in the console tree. To preserve the console state, save the changes.

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

Note about registry keys location when installing AccuRoute Server on a 64 bit machine

The 64 bit operating system stores registry keys for 32 bit applications under Wow643Node. Therefore, when installing AccuRoute Server on a 64 bit machine, the Omtool registry keys are located in **HKLM\SOFTWARE\WOW6432NODE\OMTOOL** and not in **HKLM\SOFTWARE\OMTOOL** directory.

Modifying AccuRoute Server configuration

If you modify the server configuration after you have completed the AccuRoute v3.01 Server install, your actions does not remove the associated program files nor does it stop and remove associated services. For example, if you uninstall the Modem Server after an upgrade, it does not remove associated program files or stop/remove modem services. They will remain until a complete uninstallation is done.

Uninstalling the AccuRoute Server

To uninstall AccuRoute Server:

1   Go to the **Control Panel** and start **Add/Remove Programs** applet.

2   Select **ACCUROUTE SERVER** and click **CHANGE/REMOVE**.

3   The InstallShield Wizard is initiated and prompts you to confirm that you want to uninstall the software.

4   Click **REMOVE**.

AccuRoute Server is removed from your system. A progress indicator shows the status of the uninstallation.

Note   After you have uninstalled the AccuRoute Server, the associated folders registry entries will remain.

Section 4: Post installation configurations

Specifying the originator of notification messages

The AccuRoute Server generates notification messages for various events and sends them to users through the AccuRoute Connectors for Exchange \ Notes \ SMTP. The display name and email address associated with these notification messages can be set in the AccuRoute Server properties. Omtool recommends setting these attributes using a valid email address so that users can reply to notification messages if they require assistance. (The default display name is Omtool Server, and the default email address is OmtoolServer.)

To specify the originator of notification messages generated by the AccuRoute Server:

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

2   Right click the AccuRoute Server in the console tree and select **PROPERTIES**. The **Server Properties** page opens.

3   Click **Settings**.

4   In the **E-mail Address** text box, enter the email address that should be associated with notification messages generated by the AccuRoute Server.

     Omtool recommends using a valid email address so that users can reply to notification messages if they require assistance.

5   In the **DISPLAY NAME** text box, enter the name that should be associated with notification messages generated by the AccuRoute Server.

6   Click **OK** to save changes to the server properties.

Logging into the Omtool Web Center and registering AccuRoute

Omtool Server Administrator provides direct access to the Omtool web site through the console node called Omtool Web Center. There are two methods of gaining access to the Omtool web site:

- registering AccuRoute

- logging in using a customer number

Omtool recommends that the primary administrator register AccuRoute with a valid e-mail address so that Omtool can send technical announcements and other important information regarding AccuRoute.

Note   After AccuRoute has been registered, the Omtool Web Center connects automatically to the Omtool web site and provides immediate access to the Knowledge Base and Downloads & Docs.

If Remote Administrator is installed for other administrative users in the environment, they may register or log in using a customer number. (If they are instructed to log in using a customer number, the customer number must be provided to those users.) The customer number is on the original sales invoice when the software is purchased directly from Omtool or on the reseller invoice when the software is purchased through an Omtool partner.

To go to the Omtool Web Center and register AccuRoute:

1   Expand the items in the console tree so that Omtool Web Center is visible.
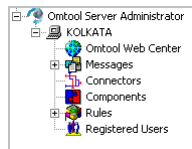
2   Click **OMTOOL WEB CENTER**.

Internet Explorer might display a security message indicating that the web site is being blocked by Internet Explorer Enhanced Security Configuration. If this message appears, add http://www.omtool.com to the Trusted sites zone.

The Omtool web site loads a registration page.

3   Complete the form and click **SEND**. The web site returns a confirmation message.

Tip   Go to **SUPPORT** and select **SUPPORT OPTIONS**. The following items become available in the navigation pane: **Knowledge Base** and **Downloads & Docs**. These two locations are important. The Knowledge Base contains technical articles with troubleshooting information and workarounds to known issues. Downloads & Docs provides direct access to all software downloads with related documentation.

Go to **CONTACT US** and select **TECHNICAL SUPPORT**. An online form allows customers to request technical support and submit comments.

Customizing access to client setup programs

The AccuRoute Server has a clients folder where it stores all the setup programs for its client applications, such as AccuRoute Desktop, AccuRoute Web Client, CostRecovery, and FaxCenter. After the AccuRoute Server is installed, the clients folder is shared but only the Omtool service account has permissions to access it.

Note   The network path to the clients folder is \\server\omtool\clients or \\server\genifax\clients where server represents the network name of the AccuRoute Server.

Omtool recommends customizing the permissions on this folder so that the users who are installing these applications on clients can access the setup programs conveniently from anywhere in the LAN. If necessary, the setup programs can be copied to a network location where all applications are stored for deployment purpose, and can also be copied to the client before installation. For more information on modifying Windows sharing and security permissions, consult Windows help.

Configuring the Compose component to convert Office message attachments using automation

The Compose component can be configured to convert documents using the conversion method "automation", which utilizes a document's native application to open the document so that it can be converted to the required delivery format. Automation is the recommended conversion method for Office documents, as this method produces the highest quality conversion results and eliminates conversion errors that can occur with other methods.

This procedure is highly recommended but not required. If Office is not being used in the LAN, or if automation is not the preferred method for converting Office documents, you can go to the next section.

The Compose component manages conversion methods for all Composers for the AccuRoute Server, so it is only necessary to complete this procedure once.

To configure the Compose component to use automation as the conversion method for Office documents:

1   Verify that a supported version of Microsoft Office is installed on the AccuRoute Server. For supported Office versions, see [Additional installation requirements](#)

2   Start Omtool Server Administrator.

3   Select the AccuRoute Server in the console tree.

4   Go to the details pane, double-click **COMPONENTS**, and then double-click **COMPOSE**.

5   Go to the **Conversions** tab.

6   Enable automation for **DOC** files. Select **DOC**, click **PROPERTIES**, select **WORD AUTOMATION**, and click **OK**.

7   Repeat the previous step for **DOCX**, **PPT**, **PPTX**, **XLS**, and **XLSX** and select the automation option for each file type.

Note   DOCX, PPTX, and XLSX are file types associated only with Office 2007. DOC, PPT, and XLS files are file types associated with Office 2003 and earlier, and are also compatible with Office 2007.

8   Click **OK** to save changes to the Compose component.

Configuring the AccuRoute Server to convert PCL message attachments

The AccuRoute Server requires additional configuration to convert PCL files. Omtool recommends completing this configuration, but it may be omitted if the AccuRoute Server is not required to convert PCL attachments.

Use the instructions that describe the AccuRoute Server configuration:

AccuRoute Server on same drive as the operating system

To configure the AccuRoute Server to convert PCL message attachments:

1   Find the short name path to **...\OMTOOL\OMTOOL SERVER\VENDORS\GHOSTSCRIPTPCL**.

Tip	To obtain the short name of a directory, run **dir /x** in the parent directory. For example, to obtain the short name of C:\Program Files, set the working directory to C:\ and run dir /x. This returns the short name of all folders under C:\.

2   Right click **My Computer** and select **PROPERTIES** from the drop down menu to open the **Properties** page.

3   Click **ADVANCED**.

4   Click **ENVIRONMENTAL VARIABLES**.

5   In the **SYSTEM VARIABLES** section add the variable **PCLFONTSOURCE**, and set its value to the short path to the GhostScriptPCL directory.

Note	Use forward slashes, and include a forward slash at the end of the path, for example, /PROGRA~1/Omtool/ OMTOOL~1/Vendors/GHOSTS~2/

6   Click **OK** to close the **Environmental Variables** page and click **OK** to close the **System Properties** page.

AccuRoute Server on different drive than the operating system

To configure the AccuRoute Server to convert PCL message attachments:

1   Copy the font files from **...\OMTOOL\OMTOOL SERVER\VENDORS\GHOSTSCRIPTPCL TO C:\WINNT\FONTS**.

2   Create **...\WINNT\FONTS** at the root level of the drive where the AccuRoute Server is installed.

3   Copy the font files from **...\OMTOOL\OMTOOL SERVER\VENDORS\GHOSTSCRIPTPCL** to **...\WINNT\FONTS** on the drive where the AccuRoute Server is installed.

4   Right click **My Computer** and select **PROPERTIES** from the drop down menu to open the **Properties** page.

5   Click **ADVANCED**.

6   Click **ENVIRONMENTAL VARIABLES**.

7   In the **SYSTEM VARIABLES** section, and verify that there is no **PCLFONTSOURCE** variable. (If it exists from a previous version of AccuRoute Server, delete it.)

Tip   When the PCLFONTSOURCE does not exist as an environmental variable, the AccuRoute Server uses \Winnt\Fonts.

8   Click **OK** to close the **Environmental Variables** page and then click **OK** to close the **System Properties** page.

Section 5: Exchange integration

This section includes:

Tip   The Omtool Knowledgebase has technical articles on troubleshooting the AccuRoute Connector for Exchange.

Adding an AccuRoute Connector for Exchange

Note   The AccuRoute Connector for Exchange is a licensed connector.

This section includes:

Exchange 2010 and 2007

For **Exchange 2010 and 2007**, the Exchange server must have a Foreign Connector specified with an address type that is not SMTP (valid address types are: FAX, FAX1, MYFAX). For general information on Foreign Connector, see http://technet.microsoft.com/en-us/library/aa996779.aspx. For information on how to create a Foreign Connector, see http://technet.microsoft.com/en-us/library/aa996397.aspx. For information on "Set-ForeignConnector" cmdlet to modify an existing foreign connector, see http://technet.microsoft.com/en-us/library/bb123789.aspx.

To add the AccuRoute Connector for Exchange 2010 or Exchange 2007 to your AccuRoute Server:

1   Start the Administrator and expand all items in the console tree if necessary.

2   Right-click **CONNECTORS > NEW > ACCUROUTE CONNECTOR FOR EXCHANGEX**. The **License** page opens.

3   In the **LICENSE** text box, enter a valid license and click **NEXT**. The **Server Address** page opens.

---

4   Select the Server Address option - **RUN ON THE OMTOOL MESSAGE SERVER** and click **NEXT**. The **Display Name** page opens.

5   In the **NAME** text box, enter a friendly name for the Connector and click **NEXT**. The **Connector folder** page opens.

6   In the **SPECIFY A FOLDER TO SCAN** text box, browse and select the folder for the connector to scan and click **NEXT**. The **Lookup Connection** page opens.

     The folder you select is the drop directory specified when creating the foreign connector using the Exchange 2007/2010 Management Shell. For information on drop directory and foreign connectors, consult Microsoft documentation in http://technet.microsoft.com/en-us/library/aa996779.aspx.

7   Verify the **HOST NAME** and **SEARCH BASE** for the lookup connection and click **NEXT**. The **Lookup Authentication** page opens.

Note   The **Host Name** is the Active Directory server.

---

8   In the **USERNAME** and **PASSWORD** text boxes, enter the logon credentials associated with the lookup user account and click **NEXT**. The **Congratulations** page opens.

9   Click **FINISH**.

Exchange 2003

To add an AccuRoute Connector for Exchange for an Exchange 2003 Server:

1   Start the Administrator and expand all items in the console tree if necessary.

2   Right-click **CONNECTORS > NEW > ACCUROUTE CONNECTOR FOR EXCHANGE**. The **License** page opens.

3   In the **License** text box, enter a valid license key and click **NEXT**. The **Server Address** page opens.

4   Select **RUN ON THE OMTOOL MESSAGE SERVER** option and click **NEXT**. The **Display Name** text box opens.

5   In the **Display Name** text box, enter descriptive name for this connector and click **NEXT**. The **Exchange Server** page opens.

6   In the **Specify Exchange Server** text box, enter the machine name or the IP address of the Exchange Server and click **NEXT**. The **Exchange Version** page opens.

7   Select **EXCHANGE 2003** and click **NEXT**. The **Address Scope** page opens.

8   Select **ORGANIZATION** if you want all users in the Exchange organization to be able to send messages through the Omtool server. Select **ROUTING GROUP** if you want only users in the Exchange site you specified to be able to send messages through the Omtool server.

9   Click **NEXT**. The **Lookup Authentication** page opens.

10   In the **USERNAME** and **PASSWORD** text boxed, enter the logon credentials associated with the lookup user account and click **NEXT**. The **Congratulations** page opens.

11   Click **FINISH**.

Specifying an email address for Exchange non-delivery reports

Exchange generates non-delivery reports, called NDRs, when it cannot deliver e-mail messages. These non-delivery reports are returned to the AccuRoute Server through the AccuRoute Connector for Exchange. The AccuRoute Connector for Exchange can either re-route non-delivery reports to a known valid e-mail addresses or delete them automatically. By default, non-delivery reports are deleted. However, Omtool recommends configuring this feature with a known valid e-mail address so that an administrator can be alerted about failures when they occur.

To specify an e-mail address for Exchange non-delivery reports:

1   Start Omtool Server Administrator.

2   Click the AccuRoute Server in the console tree, and double-click the AccuRoute Connector for Exchange in the details pane.

3   Go to the **Options** tab.

4   Go to **Non-delivery Report Processing**, select **SEND TO SPECIFIED E-MAIL ADDRESS**, and enter a known valid e-mail address.

5   Click **OK** to save the changes to the AccuRoute Connector for Exchange.

Configuring lookup methods

The AccuRoute Server utilizes the lookup configurations in the AccuRoute Connector for Exchange properties to retrieve information about users.

- **DID/DTMF lookup** identifies the recipient of an inbound fax.

Note   For Exchange 2010 and for Exchange 2007 lookup is configured in the AccuRoute Connector for SMTP as the AccuRoute Connector for Exchange 2010/2007 does not route inbound messages to Exchange users.

- **Sender lookup** retrieves user attributes associated with the message sender, and these values are used to populate variables in Cover Pages, Routing Sheets, and notification messages.

- **Recipient lookup** identifies the fax address of a message recipient when the message is created using the Genifax Send form and when the AccuRoute Connector for Exchange configuration specifies that messages to GAL recipients are to be delivered as faxes. (Instructions on configuring recipient lookup are included with information on publishing the Genifax Send form. Go to Configuring recipient lookup for the Genifax Send form on 5-9.)

Reviewing the default DID/DTMF lookup configuration for inbound faxing

DID/DTMF lookup identifies the recipient of an inbound fax. To retrieve the recipient e-mail address, the AccuRoute Server submits a lookup request using the last 4 digits of the DID/DTMF string captured by the Modem Server. When the recipient e-mail address is returned, the AccuRoute Connector for Exchange can deliver the message to the Exchange server.

Tip	The default AccuRoute Connector for Exchange (or AccuRoute Connector for SMTP if using Exchange 2010/2007) configuration specifies the facsimileTelephoneNumber attribute for DID/DTMF lookup. (This is the Active Directory and LDAP attribute that stores the fax number of users.) Change the attribute if necessary, and also confirm that the lookup attribute is indexed. Indexing the lookup attribute optimizes lookup speed.

The DID/DTMF lookup configuration can be modified and tested in the AccuRoute Connector for Exchange properties. For information on modifying the DID/DTMF lookup configuration, consult the Omtool Server Administrator help.

Note	If faxing is not enabled for the AccuRoute Server, no modification is necessary.

Reviewing the default sender lookup configuration

Sender lookup retrieves user attributes associated with the message sender, and these values are used to populate variables on Routing Sheets, Cover Pages, and notification messages. (For example, suppose a notification template includes the variable %SENDER_TITLE%. Sender lookup retrieves all available user attributes for the sender including the job title so that the AccuRoute Server can continue processing the message and populate the variable %SENDER_TITLE% with the job title of the message sender.) The AccuRoute Server submits a request for sender attributes using the sender e-mail address.

The content of Routing Sheets, Cover Pages, and notification messages can be customized using the templates in **...\OMTOOL\OMTOOLSERVER\LANGUAGES\ENU**. For more information on modifying templates, consult the Omtool Server Administrator help. (Go to Related documentation on 1-4.)

Tip	The default AccuRoute Connector for Exchange configuration specifies the mail attribute for sender lookup. Verify that this is the appropriate attribute for sender lookup based on the sender e-mail address and confirm that the lookup attribute is indexed. Indexing the lookup attribute optimizes lookup speed.

The sender lookup configuration can be modified and tested in the AccuRoute Connector for Exchange properties. For information on modifying the sender lookup configuration, consult the Omtool Server Administrator help. (Go to [Related documentation](#) on 1-4.)

Setting up failover for multiple AccuRoute Connectors for Exchange

Important	This is supported for Exchange 2003 servers only.

Each AccuRoute Connector for Exchange on the AccuRoute Server functions as a gateway to one Exchange server. When there are multiple Exchange servers in the LAN, multiple AccuRoute Connectors for Exchange can be installed on the AccuRoute Server and configured for failover so that the AccuRoute Server can still send outbound messages through an available AccuRoute Connector for Exchange if another AccuRoute Connector for Exchange becomes disabled. AccuRoute Connector for Exchange failover supports outbound messages only.

Only one AccuRoute Connector for Exchange can be installed on an Exchange Server. If you need to configure additional connectors, you must purchase additional licenses. Contact [Omtool Sales](#) for more information.

Tip	If there is only one Exchange server in the LAN, Omtool recommends using Omtool Server Monitor to monitor the status of the AccuRoute Connector for Exchange.

To configure AccuRoute Connector for Exchange failover:

1   Start Omtool Server Administrator.

2   Click the AccuRoute Server in the console tree, and double click the appropriate AccuRoute Connector for Exchange in the details pane.

3   Click **ADVANCED** on the **General** tab.

4   Select an available AccuRoute Connector for Exchange and click **OK**.

5   Click **OK** to save the changes to the AccuRoute Connector for Exchange.

This procedure configures one AccuRoute Connector for Exchange for failover. Repeat the procedure on other AccuRoute Connectors for Exchange if necessary.

Deploying the Genifax Send form for Outlook

The Genifax Send form for Outlook is a special Outlook form that submits messages to the AccuRoute Server so that they can be delivered as faxes. The Genifax Send form is equipped with numerous options for cover pages, billing, delivery, and notification.

To deploy the Genifax Send form for Outlook, Genifax forms must be published. Forms Publisher, an Omtool utility that publishes forms to the organizational forms library.

Note	The forms are published to the Organizational forms library, however the profiles are stores in a local or public folder.

It is located in the Clients folder on the AccuRoute Server installation DVD, and is installed on the AccuRoute Server with a complete installation.

To get started deploying the Genifax Send form for Outlook, continue to Creating the organizational forms library and assign the Owner role to the user publishing Genifax forms.

Creating the organizational forms library and assign the Owner role to the user publishing Genifax forms

Create the organizational forms library in Exchange for the Genifax forms and assign the Owner role to the user who is publishing the Genifax forms. (The Owner role is required so that the user can publish the Genifax forms to the organizational forms library.) Use the appropriate procedure based on the version of the Exchange server:

Exchange 2010 and 2007 (5-6)

Exchange 2003 (5-6)

Exchange 2010 and 2007

For instructions in how to create an organizational Forms Library in Exchange 2010 and in Exchange 2007, see http://support.microsoft.com/kb/933358/en-us.

For information on how to move an existing Organizational Forms Library from Exchange 2003 to a public folder store for Exchange 2010/2007, see http://technet.microsoft.com/en-us/library/bb331970.aspx.

For information on how to manage public folders, see http://technet.microsoft.com/en-us/library/bb124411.aspx.

Exchange 2003

To create the organizational forms library in Exchange 2003 and assign the Owner role to the user publishing Genifax forms:

1   Log in to a system where System Manager is installed. Use an account that is an Exchange Full Administrator. (An Exchange Full Administrator has permissions to administrate the Exchange system and modify permissions.)

2   Start System Manager and go to the following node in the console tree: **Folders > Public Folders**.

3   Right-click **PUBLIC FOLDERS** and select **VIEW SYSTEM FOLDERS**.

4   Right-click **EFORMS REGISTRY** and select **NEW > ORGANIZATIONAL FORM**.

5   Enter a name for the library in the **Name** field, verify that the language is correct, and click **OK**. The
       library in added to the console tree under **EFORMS REGISTRY**.

Tip   Exchange supports only one organizational form library per language. If the appropriate language is not available
           in the language menu, it is most likely because a library has already been created.

6   Right-click the library in the console and select **PROPERTIES**.

7   Go to the **Permissions** tab and click **CLIENT PERMISSIONS**.

8   Add the user who is publishing the Genifax forms, configure the permissions so that the **Owner** role
       is assigned to the user, and click **OK**.

9   Click **APPLY** and click **OK**.

Installing Forms Publisher on an Outlook client

Install Forms Publisher on an Outlook 2007/2003/XP/2000 client running Windows XP/2000 SP3. If the Outlook user
who is publishing the Genifax forms has a personal workstation that meets these requirements, Forms Publisher may
be installed there. If Forms Publisher is installed on a different system, an Outlook profile must be set up temporarily
for the Outlook user publishing the Genifax forms. (Forms Publisher invokes Outlook to establish a connection to
the Organizational Forms Library and publish the Genifax forms, and the Outlook user's profile is utilized to connect
to the Organizational Forms Library.)

Note   Do not install Forms Publisher on the AccuRoute Server or the Exchange server.

To install Forms Publisher:

1   Log in to the system where Forms Publisher is being installed. Use an account that belongs to the local
       Administrators group.

2   Go to **...\OMTOOL\OMTOOLSERVER\CLIENTS\FORMSPUBLISHER** on the AccuRoute Server and run
       SETUP.EXE. The setup displays a welcome message.

3   Click **NEXT**. The setup shows the license agreement.

4   Click **YES**. The setup shows the destination folder.

5   Change the destination folder if necessary and click **NEXT**. The setup shows installation settings.

6   Review the installation settings and click **NEXT** to begin the installation. The setup installs Forms
       Publisher and displays a message indicating that the installation was successful.

7   Click **FINISH**.

Publishing the Genifax forms

The Genifax forms must be published to the organizational forms library so that users can access them from Outlook clients in the LAN.

Before the form are published, the user who is publishing the forms must know whether the Genifax Send Form is being administered using public folder profiles or local profiles. A profile is a collection of settings that determine the form configuration. (A public folder profile is stored in a public folder with the Genifax Send form and can be modified only by administrative users.) With public folder profiles, profiles can be created and assigned to users and groups. A profile is stored locally on the client machine once it is setup within their Outlook profile and the user needs to specify the options for the form. The forms are stored in the Organizational Forms Library.

To publish Genifax forms for Outlook:

1 Log in to the system using the login credentials of a local Admin and then log into Outlook with the account that is "Owner" of the organizational forms library.

Note The Outlook login is necessary to publish the forms.

2 Start Forms Publisher. (Use the Start menu shortcut in the Omtool programs group.)
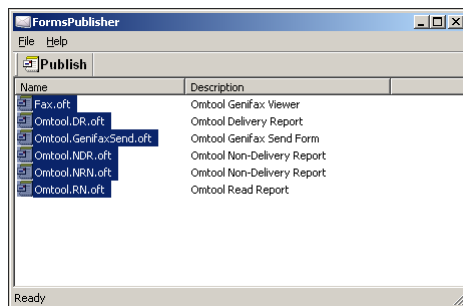
3 Verify that all forms are selected and click **PUBLISH**. Forms Publisher starts publishing Genifax forms to the Organizational Forms Library and then displays a dialog box.

Tip While Forms Publisher is publishing the forms, a security warning might appear and require that macros be enabled or disabled. Genifax forms do not utilize macros, so macros can be enabled or disabled with no impact on functionality.
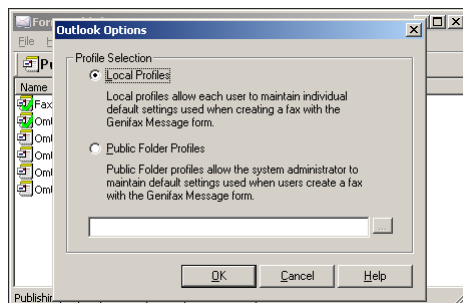
4 Select one of the following options and click **OK**:

▶ **LOCAL PROFILES** - The Genifax form is published to the Organizational Forms Library. When accessed by a user, the form is downloaded to the local system and its default settings become part of each user's local profile.

▶ **PUBLIC FOLDER PROFILES** - The Genifax form is published to the Organizational Forms Library where its default settings are managed by an administrator. After selecting this option, click the browse button and select the public folder where the forms are being published. (A new folder may be created if necessary.)

Forms Publisher finishes publishing the forms. The status bar indicates that Forms Publisher is done.
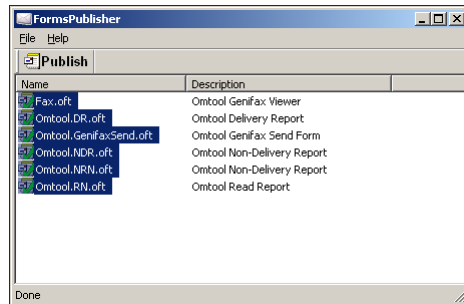
Note   Users must be advised on how to access the Omtool Genifax Send Form.

Creating and assigning profiles

The Omtool Genifax Send form supports profiles that determine the default selections on the form and the options that are available to users. For more information on creating and assigning profiles, consult the Omtool Server Administrator help. (Go to Related documentation on 1-4.)

Configuring recipient lookup for the Genifax Send form

The recipient lookup configuration enables the AccuRoute Connector for Exchange to identify the fax address of a message recipient when the message is created using the Genifax Send form and when the AccuRoute Connector for Exchange configuration specifies that messages to GAL recipients are to be delivered as faxes. This feature is not configured by default. For more information on configuring recipient lookup, consult the Omtool Server Administrator help. (Go to Related documentation on 1-4.)

Section 6: Notes integration

This section includes:

Tip   The Omtool Knowledgebase has technical articles on troubleshooting the AccuRoute Connector for Lotus
Notes.

Configuring lookup methods

The AccuRoute Server utilizes it connection to the Notes server to accomplish the following tasks:

- authenticate users
- retrieve sender and recipient information for Cover Pages and Routing Sheets
- identify the recipient of inbound messages based on the recipient's DID extension or fax number
- display the contents of the global directory when queries from the Omtool Server Administrator

By default, the server configuration wizard adds a search base for DID/DTMF lookup configuration.

Reviewing the default DID/DTMF lookup configuration for inbound faxing

The DID/DTMF lookup configuration enables the AccuRoute Connector for Lotus Notes to determine the recipient of an inbound fax. By default, the AccuRoute Connector for Lotus Notes is configured to query the **facsimileTelephoneNumber** field using the last 4 digits of the received DID/DTMF string. (This data is captured by the Modem Server.) This query returns the e-mail address of the recipient so that the message can be delivered to the recipient's email address through the AccuRoute Connector for Lotus Notes.

You can modify this configuration and test that the new configuration is successful. For instructions on how to modify the DID/DTMF lookup configuration, consult the Omtool Server Administrator Help.

> *Note*   If faxing is not enabled for the AccuRoute Server, no modification is necessary.

Reviewing the default sender lookup configuration

The sender lookup configuration enables the AccuRoute Connector for Lotus Notes to retrieve information about the message sender so that it can be displayed on Routing Sheets, Cover Pages, and notification messages.

> *Tip*   The content of Routing Sheets, Cover Pages, and notification messages can be customized using their respective templates located on the AccuRoute Server in **...\Omtool\Omtool Server\Languages\ENU**. For more information on modifying Routing Sheet templates, Cover Page templates, and notification message templates, consult the Omtool Server Administrator help.

For example, suppose Cover Page templates are configured to display the job title of the message sender. (The template variable %SENDER_TITLE% is populated automatically with the job title of the message sender when the message is composed by the AccuRoute Server.) The AccuRoute Connector for Lotus Notes retrieves the job title of the message sender using the sender lookup configuration.

By default, the AccuRoute Connector for Lotus Notes is configured to query the mail field using the sender's email address and return the required user attributes. This configuration can be modified and tested to ensure successful results. For information on modifying the sender lookup configuration, consult the Omtool Server Administrator help. (Go to Related documentation on 1-4.)

Configuring recipient lookup

The recipient lookup configuration enables the AccuRoute Connector for Lotus Notes to retrieve information about the message recipient that can be shown on Routing Sheets, Cover Pages, and notification messages.

> *Note*   This feature is not configured by default, but can be useful for organizations that send messages internally and/or manage their external contacts in a database that can be queried using LDAP.

For instructions on configuring recipient lookup, consult the Omtool Server Administrator help. (Go to Related documentation on 1-4.)

Registering the AccuRoute Connector for IBM® Lotus® Notes as a Notes user

The AccuRoute Connector for Lotus Notes on the AccuRoute Server must be able to connect to the Domino server with an user ID with a blank password. This requires a new Notes user. Create the new Notes user following the procedure below.

Creating new Notes user:

1   Login to the system running the Domino server using the credentials of the Lotus Domino Administrator.

2   Register a new user. The first name of the user should be "Omtool" and the last name should be "connector".

3   Add the user to the registration queue.

4   Using the Switch ID feature, login as the new user.

5   Clear the password associated with this account.

For information on registering users in t he Lotus Domino Administrator, consult the Lotus Domino Administrator help.

Installing the Notes client on the AccuRoute Server

After you have registered "Omtool connector" as a registered user, you must install the Notes client on the system running the AccuRoute Server. For information on installing the Notes client, consult the Notes documentation.

After you have installed the client, you must configure the client for the user "Omtool connector". For configuration instructions, consult the Notes documentation.

Modifying permissions on the default Notes mail template

The Lotus Notes Administrator has to decide if the mail template should be altered to show the Genifax FAX button. If the template should be altered, the Omtool service account should be given appropriate permissions to change the Lotus Notes template.

Once the permissions are granted, the standard Lotus Notes template will be altered during the Genifax update process.

Configuring the AccuRoute Server with the Notes installation path

Use the following procedure to add the Notes client installation path to the Genifax system path on the AccuRoute Server:

To add the Notes installation path:

1   Log on to the system running the AccuRoute Server.

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

3   The **System Properties** page opens.

4   Click **ADVANCED**.

5   Click the **ENVIRONMENT VARIABLES** option.

6   In the **System variables** section, select **PATH** in the Variable list, and click **EDIT**.

      The **Edit System Variable** page opens.

7   In the **VARIABLE VALUE** text box, position the cursor at the end of text and type:

      `;c:\lotus\notes\`.

Note   "c:\lotus\notes\" should be the path to the Notes client on the computer where you are working. If you installed the Notes client in a different location, specify that path in the text box.

---

8   Click **OK** to close the **Edit System Variable** page and then click **OK** to close the **Environment Variables** page.

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

Running the Notes setup on the AccuRoute Server

To run the Notes setup on the AccuRoute Server:

1   Log on to the system running the AccuRoute Server.

2   Navigate to **...\OMTOOL\OMTTOOLSERVER\CLIENTS\NOTES** Setup.

3   Run **SETUP.EXE**. The **Welcome** page opens.

Note   Do not run the Notes setup from the AccuRoute installation DVD.

---

4   Click **NEXT**.

5   In the I**nstall this application for** section, make a selection.

         ▸   Select the **ANYONE WHO USES THIS COMPUTER (ALL USERS)** option if you are installing the Notes setup for all users on this computer.

         ▸   Select the **ONLY FOR ME (OMTOOL)** option to install the Notes setup for the current user.

6   Click **NEXT**. The **Choose Destination Location** page opens.

7   Click **NEXT** to accept the default destination location **C:\PROGRAM FILES\OMTOOL\GENIFAX**. Alternately, if you want to change the destination location, click **BROWSE**, navigate to the directory where you want to install the Notes setup, click **OK**, and click **NEXT**.)

     The **Domino Server** page opens. The Server text box is filled in with the canonical name of the Domino server. The name was detected by the setup program in the Notes.ini file.

8   Verify that the server name is correct and click **NEXT**. The Password page opens.

9   In the Password text box, enter the password associated with your Notes administrator account. Click **NEXT**.

     The **Update mail template** page opens.

10   Select **YES** if you want to modify the default mail template and add fax options. Select **NO** if you do not wish to make any modifications.

11   Click **NEXT**. The **Domino Version** page opens.

Note   If you selected Yes, the setup program creates a backup copy of the default mail template so that it can be restored if you uninstall the Genifax Notes setup or modify the installation later via Add/Remove Programs. If you select No, users can send "one-off" faxes only. One-off faxes, created using the Notes New Memo, form do not support special Genifax features such as secure fax delivery, preview, approval, etc.

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12   Select the version of your Domino server - 5.x or 6.x. and click **NEXT**. The **Default Mail Template** page opens.

     Based on the Domino server version you select, the setup program supplies the name of the default mail template on the Domino server: `mail50.ntf` for Domino server 5.x or `mail6.ntf` for Domino server 6.x.

13   If the default mail template file on the Domino server is different than the file name that appears in the text box, enter the correct file name. Click **NEXT**. The **Profile Management** page opens.

14   Select **ADMINISTRATOR MANAGED** option if you want network administrators to create profiles and assign users to them. Otherwise select **USER MANAGED** option so that the user can create and manage their own profiles.

15   Click **NEXT**. The **Notes Foreign Domain** page opens.

     The setup program creates a foreign domain for faxes created by Notes users. The default foreign domain name is `Genifax`.

16   If you want to change the name of the foreign domain for faxes, type a new name in the text box.

Note   The fax foreign domain name must be included in one-off faxes.

---

17   Click **NEXT**. The **Start Copying Files** page opens.

18   Review the installation settings and click **NEXT**. When installation is complete you see a message
indicating that the setup was successful.

19   Click **OK**. The InstallShield Wizard Complete page opens.

20   Click **FINISH** to complete the installation.

21   Restart the computer for the changes to take effect.

Giving the AccuRoute Connector for Lotus Notes access to the Genifax_ mail.box

The Notes client on the AccuRoute Server is configured for the user Omtool connector in Registering the
AccuRoute Connector for IBM® Lotus® Notes as a Notes user (6-3). Using the Lotus Domino Administrator, give
this user Manager access permissions to Genifax_mail.box. (The Genifax_mail.box is located on the Domino server.)

For instructions on modifying the access control list for the Genifax_mail.box, consult the Lotus Domino
Administrator help.

Adding the AccuRoute Connector for Lotus Notes to the AccuRoute Server

Note   The AccuRoute Connector for Lotus Notes is a licensed connector.

Before adding the AccuRoute Connector for Lotus Notes, you must manually register the connector executable and
then add the AccuRoute Connector for Lotus Notes.

Registering Notes executable

To manually register the Notes executable:

1   Login to the system running AccuRoute Server using an account that belongs to the Administrator.

2   Open a command prompt.

3   Enter the following command:

```
"C:\Program Files\Omtool\Omtool Server\bin\OmConGFNotesU.exe" -
regserver
```

where `C:` is the drive where the AccuRoute Server is installed.

4   Press **ENTER**.

Adding AccuRoute Connector for Lotus Notes

To add the AccuRoute Connector for Lotus Notes to the AccuRoute Server:

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

2   In the console tree, right click **CONNECTORS > NEW > ACCUROUTE CONNECTOR FOR LOTUS NOTES**. The **License** page opens.

3   In the **LICENSE** text box, enter a valid license and click **OK**. The **Server Address** page opens.

4   Select **RUN ON THE OMTOOL MESSAGE SERVER** option. Click **NEXT**. The **Display Name** page opens.

5   In the **NAME** text box, enter a friendly name for the connector and click **NEXT**. The **Lotus Notes Connector Lookup Configuration** page opens.

6   In the **LDAP HOST NAM**e text box, enter the name of the system which has the LDAP server. In the **SEARCH BASE** text box, enter the lookup search base in the LDAP. Click **NEXT**.

7   Click **FINISH**.

The connector is added to the AccuRoute Server.

Section 7: SMTP integration

This section includes:

Tip　　　　　The Omtool Knowledgebase has technical articles on troubleshooting the AccuRoute Connector for SMTP.

In case your environment does not have an AccuRoute Connector for Exchange or AccuRoute Connector for Lotus Notes, you can configure the AccuRoute Connector for SMTP for Active Directory lookups when sending and receiving messages.

Configuring lookup methods

The AccuRoute Server utilizes the lookup configurations in the AccuRoute Connector for SMTP properties to retrieve information about users.

DID/DTMF lookup identifies the recipient of an inbound fax.

Reviewing the default DID/DTMF lookup configuration for inbound faxing

DID/DTMF lookup identifies the recipient of an inbound fax. To retrieve the recipient e-mail address, the AccuRoute Server submits a lookup request using the last 4 digits of the DID/DTMF string captured by the Modem Server. When the recipient email address is returned, the AccuRoute Connector for SMTP can deliver the message to the SMTP server.

Tip　　　　　The default AccuRoute Connector for SMTP configuration specifies the facsimileTelephoneNumber attribute for DID/DTMF lookup. (This is the Active Directory and LDAP attribute that stores the fax number of users.) Change the attribute if necessary, and also confirm that the lookup attribute is indexed. Indexing the lookup attribute optimizes lookup speed.

The DID/DTMF lookup configuration can be modified and tested in the AccuRoute Connector for SMTP properties. For information on modifying the DID/DTMF lookup configuration, consult the Omtool Server Administrator help.

Note If faxing is not enabled for the AccuRoute Server, no modification is necessary.

Section 8: Installing ObjectArchive

This section includes:

Introduction to ObjectArchive

ObjectArchive provides for storage and retrieval of stored data. The data can be scanned images, multimedia and other textual/non-textual data). The data is stored as individual objects with unique object keys. The object keys are 128 bit (16 bytes) Universally Unique IDs (UUID) and are the primary methods of accessing storing/retrieving) data from the archive database.

Important	ObjectArchive must be installed on a system remote from AccuRoute Server.

When scaling an environment with additional connectors or components, always consult an Omtool Technical Support engineer. For contact information, see Omtool Support and Sales. The Omtool Technical Support engineer can assist you in correctly identifying potential bottlenecks in the system based on workload and other factors. Moreover, the Support engineer can provide helpful information on the overall impact of increasing the speed and efficiency of the system. Performance and stability consulting are also available for a fee.

For a detailed analysis of the environment is necessary, the Omtool Technical Support engineer may recommend a fee-based consultation.

Important	ObjectArchive is not cluster aware.

Requirements for ObjectArchive

This section includes:

Hardware and software requirements

Object Archive requires a system that meets the following minimum requirements:

❐ Windows NT domain computer that always runs in the same domain as the AccuRoute Server

❐ 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

❐ Windows 2008 64 bit, 2003 Standard Edition SP2 64 bit

❐ MS SQL Server 2008/2005

Important   The SQL Server does not have to be the same one used for the AccuRoute Server databases.

Additional requirements

Object Archive installation also requires the following:

❐ AccuRoute Server installation DVD (or access to a network copy of the AccuRoute Server setup)

❐ Windows user account that belongs to the AccuRoute Administrators group

Installing ObjectArchive

To install Object Archive:

1   Log in to the system where you will install the ObjectArchive using an account that belongs to the AccuRoute Administrators group. This system must be a system other than AccuRoute Server.

2   Insert the AccuRoute Server installation DVD into a DVD-ROM drive. Alternately, navigate to the network where you have kept the AccuRoute Server setup files.

3   Run **\MESSAGESERVER\SETUP.EXE**.

The InstallShield wizard opens and configures your system for installation and displays a welcome message.
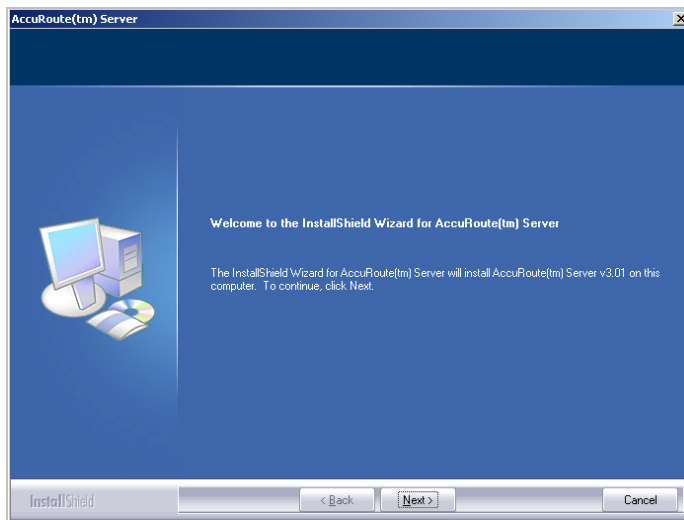
4   Click **NEXT**. The setup shows the license agreement page.

5   Select **I ACCEPT THE TERMS OF THE LICENSE AGREEMENT**, and click **NEXT**.

The setup shows the installation options.
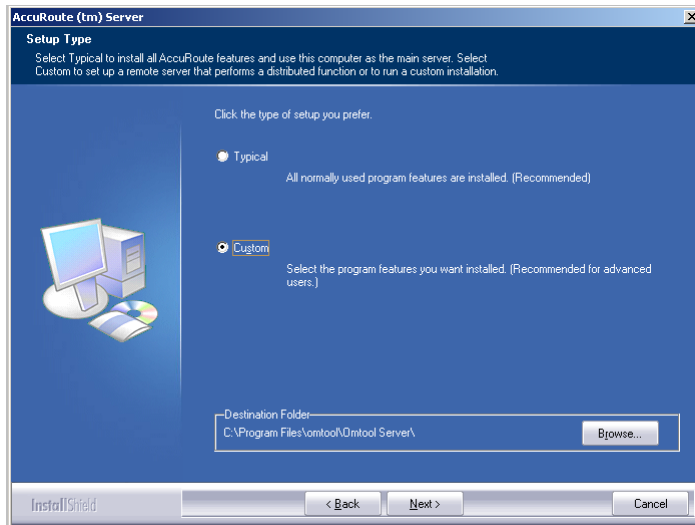
6 Select **CUSTOM** and click **NEXT**. The setup shows a list of AccuRoute features.

7 Select **OBJECTARCHIVE**, clear all the other features you are not installing at this time.

8 Click **NEXT**.

The setup checks the system for installation requirements and displays the results.

Note   The setup cannot continue until all requirements are installed and configured. (Double-click an item in the list for more information.) If any required components were not detected, click **CANCEL** and click **YES** to exit the setup and install the components that are required to complete the installation.

9   Click **NEXT** to continue the installation.

The setup requests logon credentials for the Omtool service account. The **NT Domain** and **User Name** fields are populated automatically based on the current Windows user.

10   Enter the logon credentials of the Omtool service account.

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

b   In the **USER NAME** text box, enter the user name.

c   In the **PASSWORD** and **CONFIRM PASSWORD** text boxes, 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:

The setup detects **SQL Server 2008 or 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.

---

e 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\OMTOOLSERVER\DATABASE**.

---

f 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 setup prompts you to choose the **ObjectArchive Workspace**.
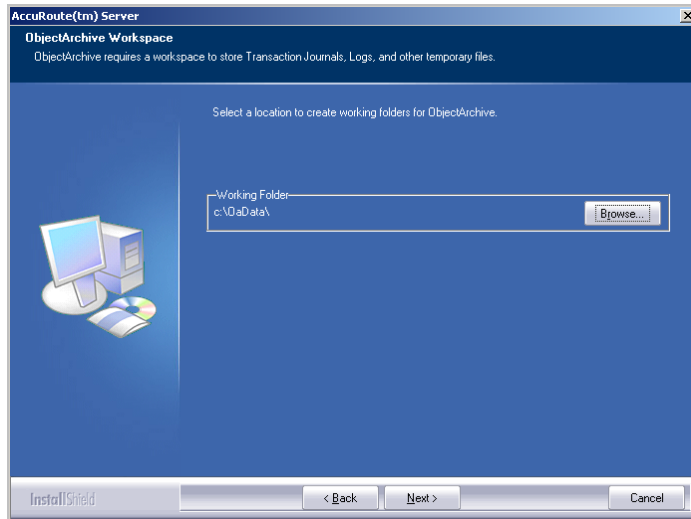
The default is `C:\OaData`. To choose another location, click **BROWSE** and select the location.

13   The setup validates the user account and then shows installation settings.
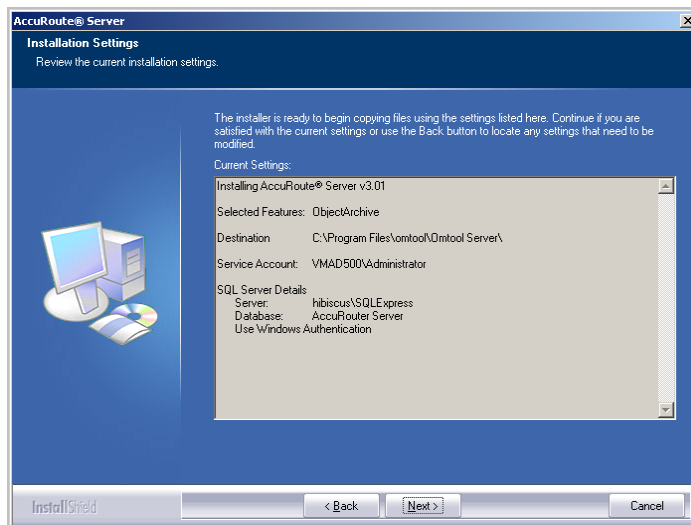
Note   If other installation features are included, the setup might request additional information before displaying installation settings.

---

14   Review the installation settings and click **NEXT** to start the installation. The setup installs the selected component and displays a message indicating that the installation is complete.
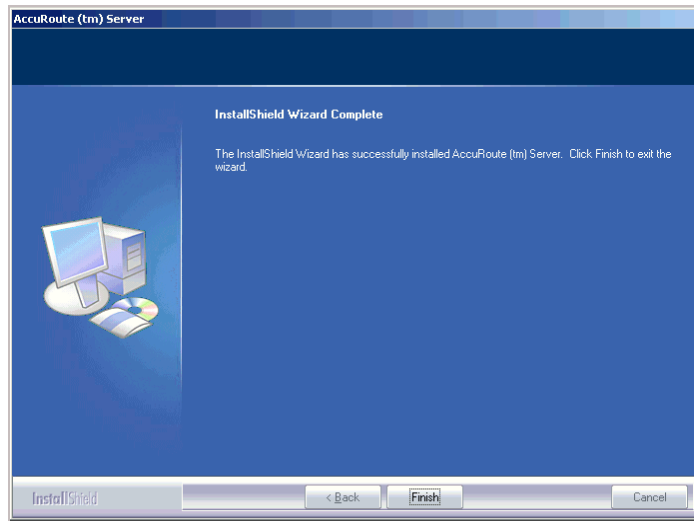
15 Click **FINISH**.

After installation is complete, navigate to the C:\OaData folder and verify that the installation was successful. The folder will contain four sub folders as shown below:

Configuring ObjectArchive

This section includes:

Configuring Volume List

Creating Volume List

Any properties you specify in the newly created Volume List must also be specified in the Active Volume List.

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 **OBJECTARCHIVE** and select **NEW > VOLUME LIST** from the drop down menu. The **New Volume List** page opens.

4   In the **NAME** text box, enter an appropriate name.

5   In the **FOLDER** text box, the path to the list is listed as by default. If you want to change the default path, make the necessary change.

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.

---

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 from the **PROPERTY** drop box the message properties for indexing. Depending on your environment, some message properties should always be indexed.

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

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

Configuring AccuRoute Server to point to ObjectArchive database

In order to configure the AccuRoute Server to point to the ObjectArchive database, create the AccuRoute Connector for DMS ObjectArchive.

To create the AccuRoute Connector for DMS ObjectArchive:

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 ACCUROUTE CONNECTOR FOR** > **DMS**. 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 **OBJECTARCHIVE**.

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 predefined Volume Lists for the ObjectArchive you are connecting to.

11   Select the Volume List from the list and click **FINISH**.

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

Removing ObjectArchive

Use the following procedure to remove ObjectArchive:

To remove ObjectArchive:

1   Click **START > ALL PROGRAMS > CONTROL PANEL > ADD/REMOVE PROGRAMS** to open the Omtool Server Administrator.

2   Select **ACCUROUTE SERVER** and click **CHANGE**.

You are prompted to confirm that you want to delete the selection.

Note   Always select **CHANGE** and not the **REMOVE** option. This is specially relevant if you have other components installed on your system. If you select the Remove option, it will remove all components and not just ObjectArchive.

3   Click **YES** to continue.

Section 9: Installing Remote Administrator

This section includes:

Introduction to Remote Administrator

Omtool Server Administrator is the management application for the AccuRoute Server. When installed on a remote system, this server management application is called a **Remote Administrator**.

The Remote Administrator provides convenient access to the AccuRoute Server for administrators who support the implementation. It includes support for Windows XP Professional, which allows administrators to manage the AccuRoute Server from their personal workstations.

Note	There is no known limit on the number of Remote Administrators that the AccuRoute Server can support.

Figure 9-A: **AccuRoute Server with Omtool Server Administrator and Remote Administrators**

The AccuRoute Server shown here has Omtool Server Administrator installed and three Remote Administrators. (This is an example of a supported configuration. The AccuRoute Server must be installed with Omtool Server Administrator, but the environment can have more or fewer Remote Administrators than shown in this illustration.)
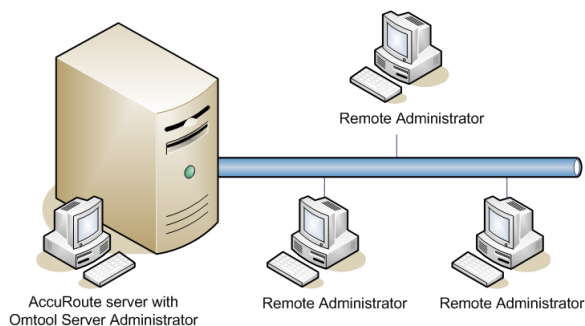
Requirements for Remote Administrator

This section includes:

Hardware and software requirements

Remote Administrator requires a system that meets the following minimum requirements:

❒　Windows NT domain computer that belongs to the same domain as the AccuRoute Server

❒　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

---

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 64 bit, 2003 Standard Edition SP2 64 bit, Windows XP

❒　Microsoft Internet Explorer 7.0 or later

❒　Acrobat Reader 7.0 or later

Other installation requirements

Remote Administrator installation also requires the following:

❒　AccuRoute Server installation DVD (or access to a network copy of the AccuRoute Server setup)

❒　Windows user account that belongs to the AccuRoute Administrators group

Permissions requirements

Remote Administrator user accounts

❒　Windows user running Remote Administrator belongs to AccuRoute Admins group (Go to Creating AccuRoute Admins group on 2-6.)

Omtool service account

❒ Omtool service account has Distributed COM access, launch, and configuration permissions on the Remote Administrator, and belongs to the local Administrators group on the Remote Administrator

---

Tip For instructions on configuring these Distributed COM permissions, consult Windows help or go to Configuring Distributed COM permissions (2-6). Where the procedure indicates to log in to the AccuRoute Server, log in to the Remote Administrator instead.

Installing Remote Administrator

To install Remote Administrator:

1 Log in to the system where you will install the Remote Administrator using an account that belongs to the AccuRoute Administrators group.

2 Insert the AccuRoute Server installation DVD into a DVD-ROM drive. Alternately, navigate to the network share where you have kept the AccuRoute Server setup files.

3 Run **\MESSAGESERVER\SETUP.EXE**.

The InstallShield wizard opens and configures your system for installation and displays a welcome message.

4 Click **NEXT**. The setup shows the license agreement page.

5 Select **I ACCEPT THE TERMS OF THE LICENSE AGREEMENT**, and click **NEXT**. The setup shows the installation options.
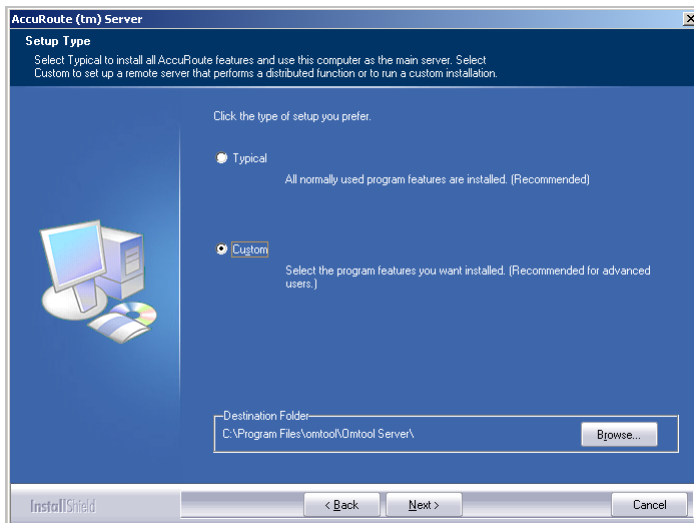
6   Select **CUSTOM** and click **NEXT**. The setup shows a list of AccuRoute features.

7   Select **OMTOOL SERVER ADMINISTRATOR**, clear all the other features that you are not installing.
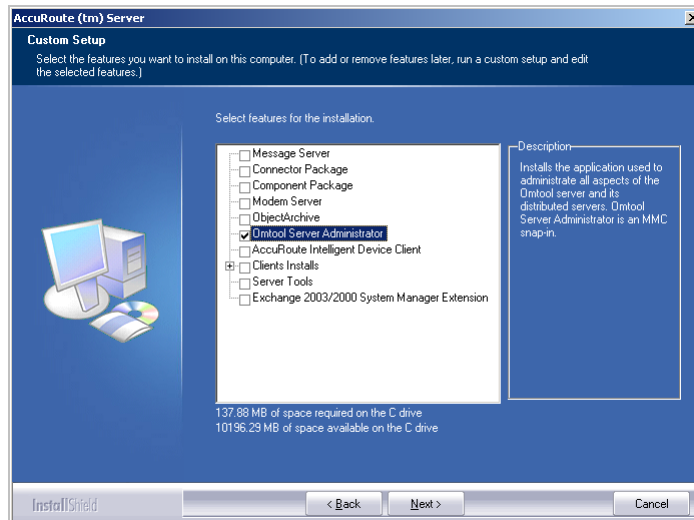
8   Click **NEXT**. The setup checks the system for installation requirements and displays the results.

9   Click **NEXT**. The setup shows installation settings.

Note   If other installation features are included, the setup might request additional information before displaying
                installation settings.

---

10   Review the installation settings and click **NEXT** to start the installation. The setup installs the selected
          features and displays a message indicating that the installation is complete.
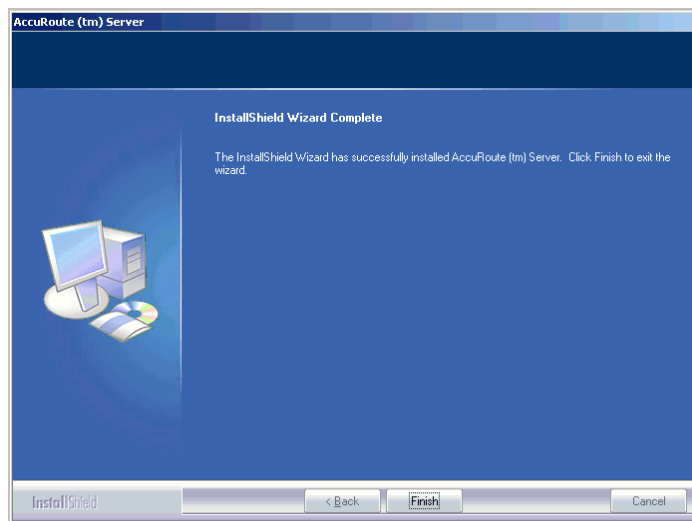
11   Click **FINISH**.

Now that Remote Administrator is installed on the remote system, start Omtool Server Administrator and connect
to the AccuRoute Server.

Starting Omtool Server Administrator and connecting to the AccuRoute Server

To start Omtool Server Administrator and connect to the AccuRoute Server:

1   Log in to the system where you installed the Remote Administrator using an account that belongs to the AccuRoute Server admins group.

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

The **Specify Omtool Message Server** page opens. The **NETWORK ADDRESS** field is populated with the name of the local system.
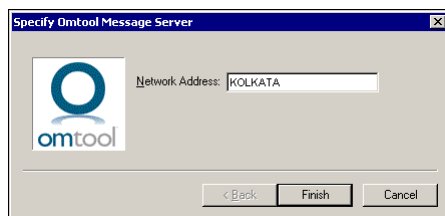
3   Enter the computer name or IP address of the AccuRoute Server and click **FINISH**. The Microsoft Management Console starts and opens the Omtool Server Administrator snap-in.
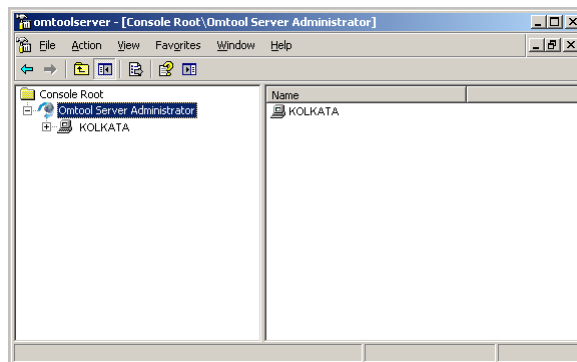
Tip   When Omtool Server Administrator is closed, Microsoft Management Console displays a message about saving changes to the MSC file. This file records the current position of items in the console tree. To preserve the console state, save the changes.

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

Problems connecting to AccuRoute Server using Remote Administrator

If you are having trouble connecting to the AccuRoute Server using Remote Administrator, add the DCOM port 135 to the Exceptions list by keeping the Firewall ON. Now you should be able to connect to and launch the AccuRoute Server without any issues.

Connecting to additional AccuRoute Servers

To connect Omtool Server Administrator to additional AccuRoute Servers:

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

2   Right-click **OMTOOL SERVER ADMINISTRATOR** in the console tree and select **CONNECT**.

     The **Specify Omtool Message Server** page opens. The **NETWORK ADDRESS** field is populated with the name of the local system.
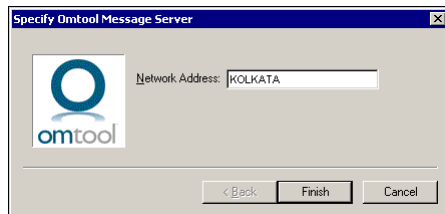
3   Enter the computer name or IP address of the AccuRoute Server and click **FINISH**.

     The Omtool Server Administrator establishes a connection to the AccuRoute Server and creates a new node in the console tree under **Omtool Server Administrator**.

Disconnecting an AccuRoute Server

To disconnect Omtool Server Administrator from an AccuRoute Server:

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

2   Expand the console tree and locate the AccuRoute Server that you want to disconnect.

3   Right-click the AccuRoute Server and select **DISCONNECT** from the drop down menu options.

     The Omtool Server Administrator removes the server from the console tree.

Section 10: Installing Remote Composer

This section includes:

Introduction to Remote Composer

AccuRoute Compose Component (Composer) is a system that performs message conversion tasks for the AccuRoute Server. An AccuRoute Server supports multiple Composers, all managed by the Compose component on the AccuRoute Server. A remote system that hosts a Composer is called a **Remote Composer**.

Figure 10-A: **AccuRoute Server with local composer and Remote Composers**

The AccuRoute Server shown here has a local Composer and three Remote Composers. (This is an example of a supported configuration. The AccuRoute Server can run without a local Composer, and the environment can have more or fewer Remote Composers than shown in this illustration.)
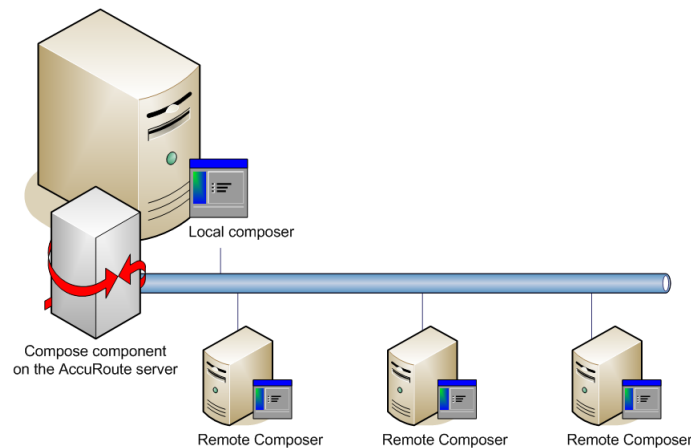
When you install an AccuRoute Server, the Compose component is installed as part of the Component Package and a Composer is created locally. As Composers are added, the Compose component workload is distributed automatically. Workload distribution can be manipulated by modifying the capabilities of each Composer. By default, a General Composer composes all types of messages, all enabled file types and final formats, and all template types, but each Composer can be modified to accept only certain types of jobs. This filtering enables a Composer to become specialized for certain types of conversions. It is also possible to enforce policies that would cause messages with certain types of files or templates to fail. For more information on configuring Composers, consult the Omtool Server Administrator help.

When scaling an environment with additional connectors or components, always consult an Omtool Technical Support engineer. For contact information, see Omtool Support and Sales. The Omtool Technical Support engineer can assist you in correctly identifying potential bottlenecks in the system based on workload and other factors. Moreover, the Support engineer can provide helpful information on the overall impact of increasing the speed and efficiency of the system. Performance and stability consulting are also available for a fee.

To purchase additional Composers, contact an Omtool Sales representative. If a detailed analysis of the environment is necessary, the Omtool Technical Support engineer may recommend a fee-based consultation.

Requirements for Remote Composer

This section includes:

Hardware and software requirements

Remote Composer requires a system that meets the following minimum requirements:

❒ Windows NT domain computer that always runs in the same domain as the AccuRoute Server

❒ 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

> 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 64 bit, 2003 Standard Edition SP2 64 bit

❒ Disable **Internet Explorer Enhanced Security Configuration** (Windows Component).

If this component is not disabled, it will not let you proceed with the installation. After you disable the component, you must reboot you system before proceeding with the installation.

❒ Microsoft Internet Explorer 7.0

Software requirements for message conversion

The Remote Composer requires one of the following applications along with Microsoft Word. An item is required only if the Composer needs to convert documents into file types associated with the application. For example, if you are planning to use Crystal Reports for compose, it must be installed on the Composer. Also, if Microsoft Office is not deployed in the LAN, the requirement does not apply.

❒   Microsoft Visio 2007/2003/XP/2000 for *.VSD and *.VDX message attachments

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

❒   Microsoft Word 2007/2003/XP/2000 for *.DOC Routing Sheet templates

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. For more information on Routing Sheet templates, consult the AccuRoute Desktop installation guide. Go to [Related documentation](#) on 1-4.

❒   Microsoft Office 2007/2003/XP/2000 for *.DOC, *.DOCX, *.XLS, *.XLSX, *.PPT, and *.PPTX 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.

Additional installation requirements

Remote Composer installation also requires the following:

❒   AccuRoute Server installation DVD (or access to a network copy of the AccuRoute Server setup)

❒   Windows user account that belongs to the AccuRoute Administrators group

❒   License key for each additional Composer

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

In case your system does not have the registry key, you must manually enable the key and set the value to 0. For instructions, see Enabling 8.3 Name Creation on NTFS Partitions (2-27).

Installing Remote Composer

To install Remote Composer:

1   Log in to the system where you will install the Remote Composer using an account that belongs to the AccuRoute Administrators group.

2   Insert the AccuRoute Server installation DVD into a DVD-ROM drive. Alternately, navigate to the network share where you have kept the AccuRoute Server setup files.

3   Run **\MESSAGESERVER\SETUP.EXE**.

The InstallShield wizard opens and configures your system for installation and displays a welcome message.

4   Click **NEXT**. The setup shows the license agreement page.

5   Select **I ACCEPT THE TERMS OF THE LICENSE AGREEMENT**, and click **NEXT**. The setup shows the installation options.

6   Select **CUSTOM** and click **NEXT**. The setup shows a list of AccuRoute features.

7   Select **COMPONENT PACKAGE**, clear all the other features that you are not installing at this time.

8 Click **NEXT**.

The setup checks the system for installation requirements and displays the results.

Note The setup cannot continue until all required components are installed. (Double-click an item in the list for more information.) If any required components were not detected, click **CANCEL** and click **YES** to exit the setup and install the components that are required to complete the installation.

9 Click **NEXT** to continue the installation.

The setup requests logon credentials for the Omtool service account. The **NT Domain** and **User Name** fields are populated automatically based on the current Windows user.

10 Enter 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.

11 Click **NEXT**. The setup validates the user account and then shows installation settings.

Note   If other installation features are included, the setup might request additional information before displaying installation settings.

12 Review the installation settings and click **NEXT** to start the installation. The setup installs the selected component and displays a message indicating that the installation is complete.

13   Click **FINISH**.

Now that Remote Composer is installed on the remote system, add the Composer to the Compose component on the AccuRoute Server. Continue to Adding the Composer to the AccuRoute Server.

Adding the Composer to the AccuRoute Server

To add a new Composer to the AccuRoute Server, go to Adding a new Composer (10-8). To replace the local Composer with the new Remote Composer, go to Replacing the local Composer with the new Remote Composer (10-10).

For each additional Composer you add to your environment, you must get a license key from Omtool. Contact Omtool Sales for more information.

Adding a new Composer

To add a new Composer to the AccuRoute Server:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR** to open the Omtool Server Administrator.
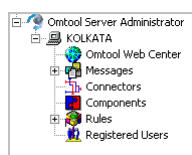
2   In the console tree, click **COMPONENTS**.

3   Double-click **COMPOSE** in the details pane to open the Compose **Properties** page.
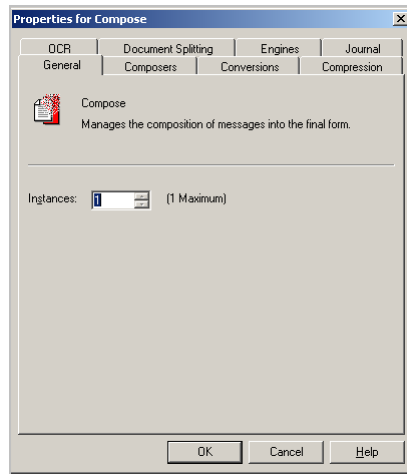
4   Click **COMPOSERS** option.
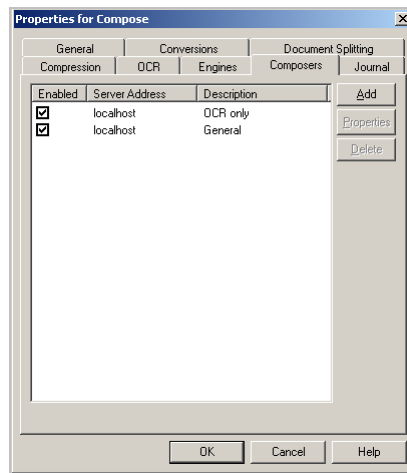
5   Click **ADD**. The **Add Composer Package** page opens.
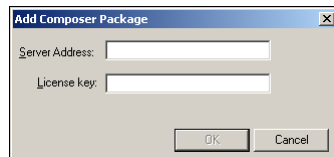
6   In the **SERVER ADDRESS** text box, enter the machine name or IP address of the Remote Composer.

7   In the **LICENSE KEY** text box, enter the license key.

8   Click **OK**.

               The system validates the license key. If the validation is successful, the Composer is added to the Compose component.

9   Click **OK** to close the Composer page.

               The Remote Composer begins performing conversion tasks immediately.

Replacing the local Composer with the new Remote Composer

For each additional Composer you add to your environment, you must purchase a license key from Omtool.

Note   To remove the General Composer, follow the procedure below.

To replace the local Composer with the new Remote Composer:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR** to open the Omtool Server Administrator.
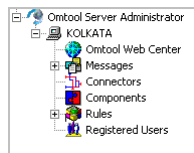
2   In the console tree, click **COMPONENTS**.

3   Double-click **COMPOSE** in the details pane to open the **Properties** page.
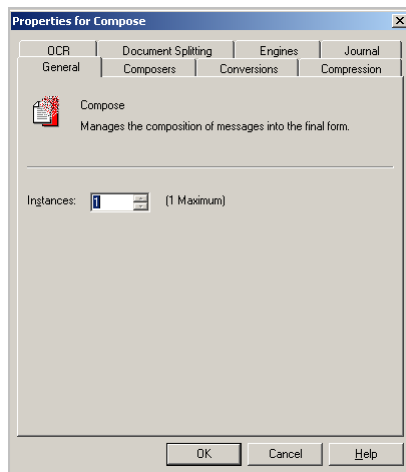
4   Click **COMPOSERS** option.
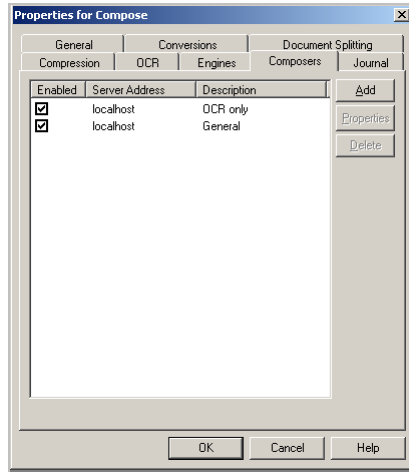
5 Select **LOCALHOST**, click **DELETE**, and then click **YES** to continue. The local Composer is removed.

Tip   The local Composer must be removed first so that the new Composer can be added without a license key.

---

6 Click **ADD**. The Add Composer Package page opens.
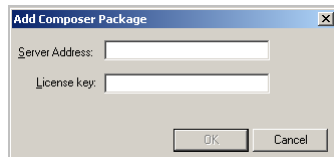
7 In the **LICENSE KEY** text box, enter the license key.

8 Click **OK**.

The system validates the license key. If the validation is successful, the Composer is added to the Compose component.

9 Click **OK** to close the Composer page.

The Remote Composer begins performing conversion tasks immediately.

Section 11: Installing Remote Modem Server

This section includes:

Introduction to Remote Modem Server

A Modem Server is a server that sends and/or receives faxes for the AccuRoute Server. It consists of at least one locally installed fax board, Brooktrout System Software / Drivers, and Omtool Modem Server software.

An AccuRoute Server supports multiple Modem Servers, all managed by the AccuRoute Connector for Telco on the AccuRoute Server. A remote system that hosts a Modem Server is called **Remote Modem Server**.

Figure 11-A: **AccuRoute Server with local Modem Server and Remote Modem Servers**

The AccuRoute Server shown here has a local Modem Server and three Remote Modem Server with a AccuRoute Connector for Telco managing all of them. (This is an example of a supported configuration.)
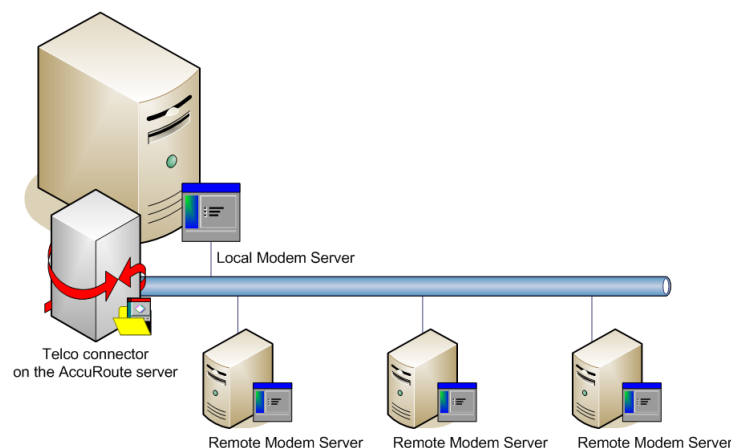
The AccuRoute Server can run without a local Modem Server, and the environment can have more Telco connectors or fewer Remote Modem Servers than shown in this illustration. The AccuRoute Connector for Telco can be configured to monitor one Telco share, an intermediary repository for inbound and outbound faxes.

Modem Servers are supported in these configurations:

- AccuRoute Connector for Telco with one Modem Server in the LAN

- AccuRoute Connector for Telco with multiple Modem Servers in the LAN

- multiple AccuRoute Connectors for Telco, each with one or more Modem Servers in the LAN

Using multiple AccuRoute Connectors for Telco delivers additional benefits to environments with special faxing requirements:

- **reduced faxing costs** - With multiple AccuRoute Connectors for Telco, the AccuRoute Server can be configured to deliver faxes using the Modem Server that is closest to the destination which can reduce long distance telephones charges.

- **failover support** - Through rules, the AccuRoute Server can be configured to route outbound faxes to one AccuRoute Connector for Telco but if delivery fails, the AccuRoute Server can route the outbound faxes to another AccuRoute Connector for Telco.

- **increased efficiency** - Multiple AccuRoute Connectors for Telco provide built-in workload distribution based on the AccuRoute Server configuration, the AccuRoute Connector for Telco configuration, and rules.

When scaling an environment with additional connectors or components, always consult an Omtool Technical Support engineer. For contact information, see Omtool Support and Sales. The Omtool Technical Support engineer can assist you in correctly identifying potential bottlenecks in the system based on workload and other factors. Moreover, the Support engineer can provide helpful information on the overall impact of increasing the speed and efficiency of the system. Performance and stability consulting are also available for a fee.

To purchase additional Modem Server, contact an Omtool Sales representative. If a detailed analysis of the environment is necessary, the Omtool Technical Support engineer may recommend a fee-based consultation.

Requirements for Remote Modem Server

This section includes:

Hardware and software requirements

A Remote Modem Server requires a system that meets the following minimum requirements:

❒ Windows NT domain computer that always runs in the same domain as the AccuRoute Server

❒ Dual core processor; 2 GHz; 2GB of RAM for T1line (2-24 channels) or 4 GB RAM for two T1 lines (24-48 channels); RAID 5W with 100 GB of disk space; DVD-ROM drive; and Microsoft mouse or compatible pointing device

❒   Windows 2008 64 bit, 2003 Standard Edition SP2 64 bit

❒   AccuRoute Connector for Telco - this requires a purchased license

❒   Microsoft Internet Explorer 7 or later

Additional installation requirements

Remote Modem Server installation also requires the following:

❒   AccuRoute Server installation DVD (or access to a network copy of the AccuRoute Server setup)

❒   Windows user account that belongs to the AccuRoute Administrators group

Note	Remote Modem Server requires installation of at least one supported Brooktrout fax board and Brooktrout System Software. For additional requirements on installing the fax board and Brooktrout System Software, consult the fax board installation guide: For information on fax board installation, consult the: The modem driver Installation and Configuration Guide.

Installing and testing the fax board and Brooktrout System Software

Before Remote Modem Server is installed, at least one fax board must be installed locally with the Brooktrout System Software. For instructions on installing the fax board and Brooktrout System Software, consult the The modem driver Installation and Configuration Guide.

Installing the Remote Modem Server

To install Remote Modem Server:

1   Log in to the system where you will install the Remote Modem Server using an account that belongs to the AccuRoute Administrators group.

2   Insert the AccuRoute Server installation DVD into a DVD-ROM drive. Alternately, navigate to the network where you have kept the AccuRoute Server setup files.

3   Run **\MESSAGESERVER\SETUP.EXE**.

The InstallShield wizard opens and configures your system for installation and displays a welcome message.
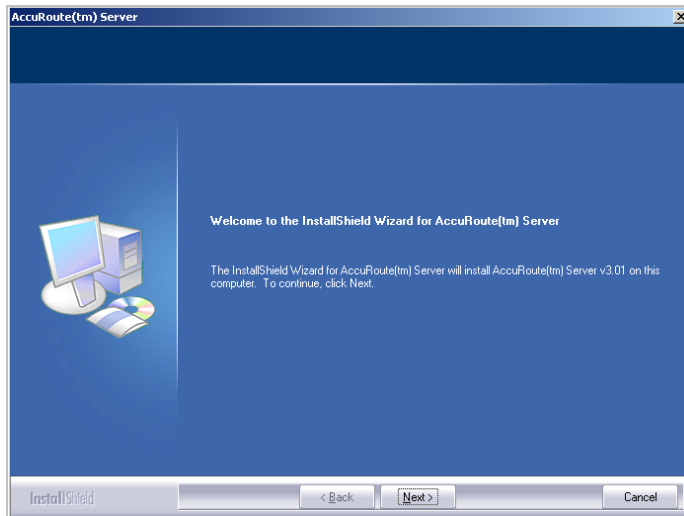
4   Click **NEXT**. The setup shows the license agreement page.

5   Select **I ACCEPT THE TERMS OF THE LICENSE AGREEMENT**, and click **NEXT**.

The setup shows the installation options.
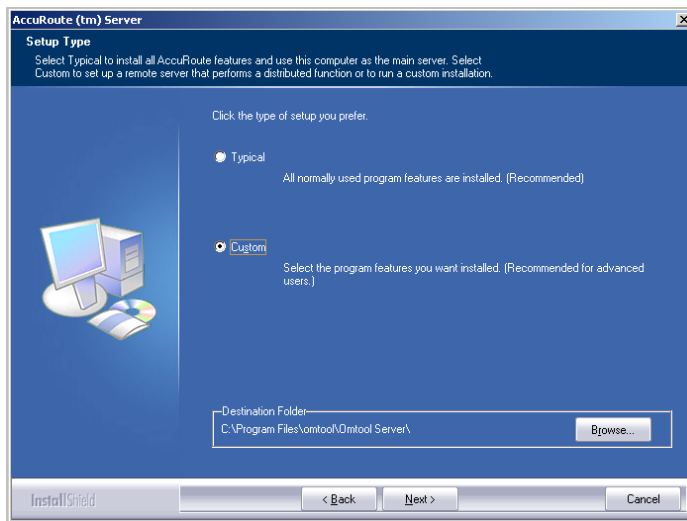
6   Select **CUSTOM** and click **NEXT**. The setup shows a list of AccuRoute features.

7   Select **MODEM SERVER**, clear all the other features you are not installing at this time.

8   Click **NEXT**.

The setup checks the system for installation requirements and displays the results.

The setup cannot continue until all required components are installed. (Double-click an item in the list for more information.) If any required components were not detected, click **CANCEL** and click **YES** to exit the setup and install the components that are required to complete the installation.

9   Click **NEXT** to continue the installation.

The setup requests logon credentials for the Omtool service account. The **NT Domain** and **User Name** fields are populated automatically based on the current Windows user.

10   Enter 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.

In the **Password** and **Confirm Password** fields, enter the password for the user.

Note   If other installation features are included, the setup might request additional information before displaying installation settings.

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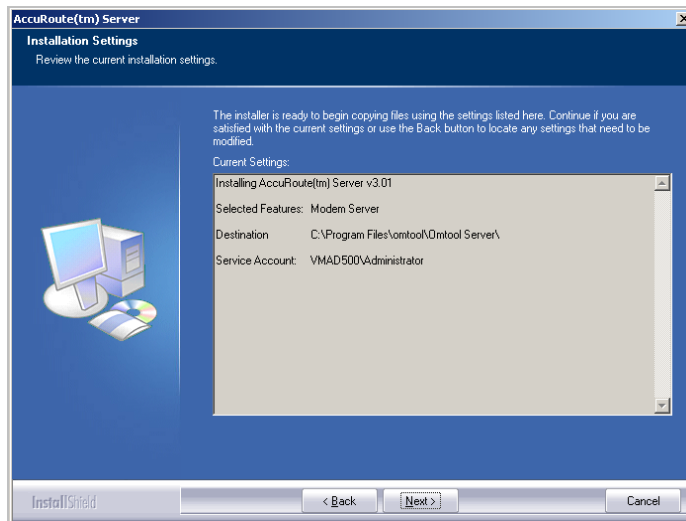
11   Review the installation settings and click **NEXT** to start the installation. The setup installs the modem server and displays a message indicating that the installation is complete.
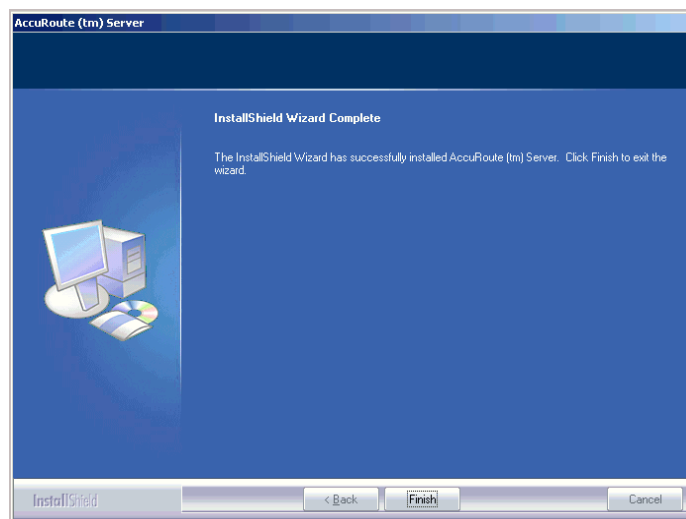
12   Click **FINISH**.

13   Continue to <u>Detecting the channels on the Modem Server</u>.

Detecting the channels on the Modem Server

After you have installed the Remote Modem Server, you must configure the AccuRoute Connector for Telco to detect the channels on the Remote Modem Server. After the channels have been detected, the properties of each channel, such as send and receive properties, can be configured in the AccuRoute Connector for Telco properties.

To detect the channels on the Modem Server:

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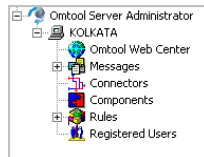

2   Click **CONNECTORS** in the console tree, and double-click **TELCO** in the details pane.

The **Properties** page opens.
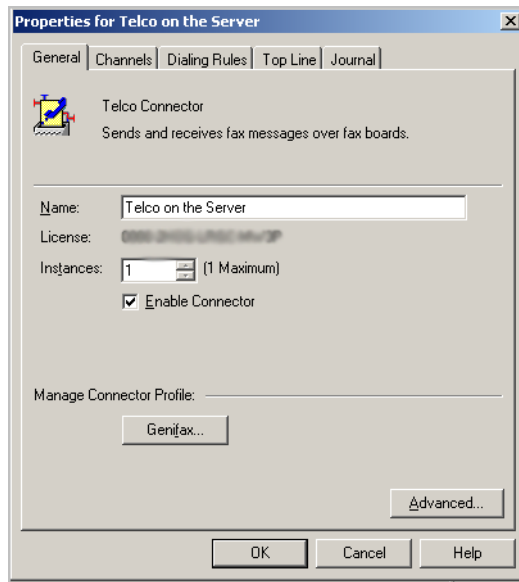
3   Click **Channels** and then click **DETECT CHANNELS**. The **Detect Channels** page opens.

4   In the **REMOTE SERVER ADDRESS** text box, enter the machine name or the IP Address of the Remote Modem Server and click **DETECT NOW**.

5   Configure the channels if necessary, and then click **OK**.

For more information on configuring the channels, consult the Omtool Server Administrator help. (Go to Related documentation on 1-4.)

Configuring the path to the Telco share directory

After you have detected the channels, you can configure the path to the Telco share directory to be a UNC path.

Note   The UNC path of the AccuRoute Server is filled in by default.

If you specify a full path what will happen is this: when the configuration file are written to the remote modem server, the remote modem channels will look for "c:\" for the send and receive queues. But they should be looking at the AccuRoute Server for the queues.

To configure the path to the Telco share directory:

1   Click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR** to open the Omtool Server Administrator.
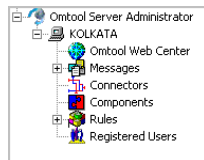
2   Click **CONNECTORS** in the console tree, and double-click **TELCO** in the details pane.

The **Properties** page opens.
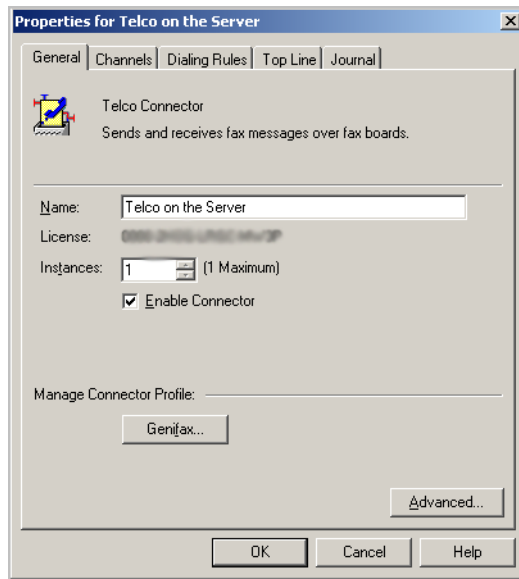
3   Click **ADVANCED** to open the **Telco Advanced Properties** page.
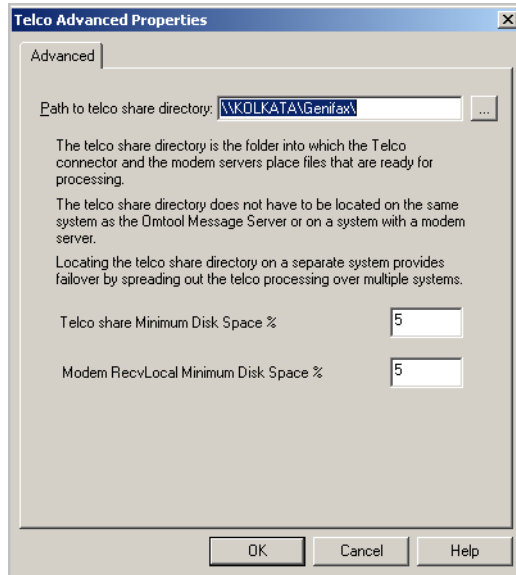
In the **PATH TO TELCO SHARE DIRECTORY** text box, the UNC path of the AccuRoute Server is filled in by default.

4   Modify the path if necessary. You can, for example, specify the name of the system instead of providing the IP Address. Add a trailing backslash at the end. (For example `\\123.4.5.678\telcoshare\`).

5   Click **OK** and then **OK** to save your changes and close the **Properties** page.

Section 12: Installing Remote Embedded Directive Manager

This section includes:

Introduction to Remote Embedded Directive Manager

Embedded Directive Manager is a component that processes messages that are routed to the Embedded Directive Manager based on rules (This includes scanning documents for bar codes and Embedded Directive IDs, applying Embedded Directive IDs to messages, and applying MyAccuRoute configurations to messages.)

When the AccuRoute Server is installed, the Embedded Directive Manager component is created locally. (It is installed automatically as part of the Component Package.) Embedded Directive Manager can also be installed on a remote system. This is called a **Remote Embedded Directive Manager**.

Having multiple Embedded Directive Managers distributes the component workload. Workload distribution is automatic; it is not configurable.

Note   The local Embedded Directive Manager component on the AccuRoute Server can be removed, but only if a Remote Embedded Directive Manager exists.

Figure 12-A: **AccuRoute Server with Remote Embedded Directive Managers**

The AccuRoute Server shown here does not have a local Embedded Directive Manager but has three Remote Embedded Directive Managers. (This is an example of a supported configuration. The AccuRoute Server can have a local Embedded Directive Manager, and the environment can have more or fewer Remote Embedded Directive Managers than shown in this illustration.)
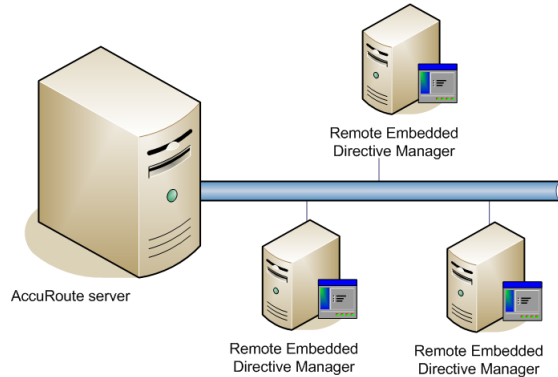
When scaling an environment with additional connectors or components, always consult an Omtool Technical Support engineer. For contact information, see Omtool Support and Sales. The Omtool Technical Support engineer can assist you in correctly identifying potential bottlenecks in the system based on workload and other factors. Moreover, the Support engineer can provide helpful information on the overall impact of increasing the speed and efficiency of the system. Performance and stability consulting are also available for a fee.

To purchase additional Embedded Directive Manager component licenses, contact an Omtool Sales representative. If a detailed analysis of the environment is necessary, the Omtool Technical Support engineer may recommend a fee-based consultation.

Requirements for Remote Embedded Directive Manager

This section includes:

Hardware and software requirements

Remote Embedded Directive Manager requires a system that meets the following minimum requirements:

❑ Windows NT domain computer that always runs in the same domain as the AccuRoute Server

❑ 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

❒ Windows 2008 64 bit, 2003 Standard Edition SP2 64 bit

❒ Disable **Internet Explorer Enhanced Security Configuration** (Windows Component).

If this component is not disabled, it will not let you proceed with the AccuRoute Server installation. After you disable the component, you must reboot the system before proceeding with the server installation.

Additional requirements

Remote Embedded Directive Manager installation also requires the following:

❒ AccuRoute Server installation DVD (or access to a network copy of the AccuRoute Server setup)

❒ Windows user account that belongs to the AccuRoute Administrators group

❒ License key for Remote Embedded Directive Manager

Contact Omtool Customer Service for the license key. There are no fees associated with this license.

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

In case your system does not have the registry key, you must manually enable the key and set the value to 0. For instructions, see Enabling 8.3 Name Creation on NTFS Partitions (2-27).

Installing Remote Embedded Directive Manager

To install Remote Embedded Directive Manager component:

1 Log in to the system where you will install the Remote Embedded Directive Manager using an account that belongs to the AccuRoute Administrators group.

2 Insert the AccuRoute Server installation DVD into a DVD-ROM drive. Alternately, navigate to the network where you have kept the AccuRoute Server setup files.

3 Run **\MESSAGESERVER\SETUP.EXE**.

The InstallShield wizard opens and configures your system for installation and displays a welcome message.

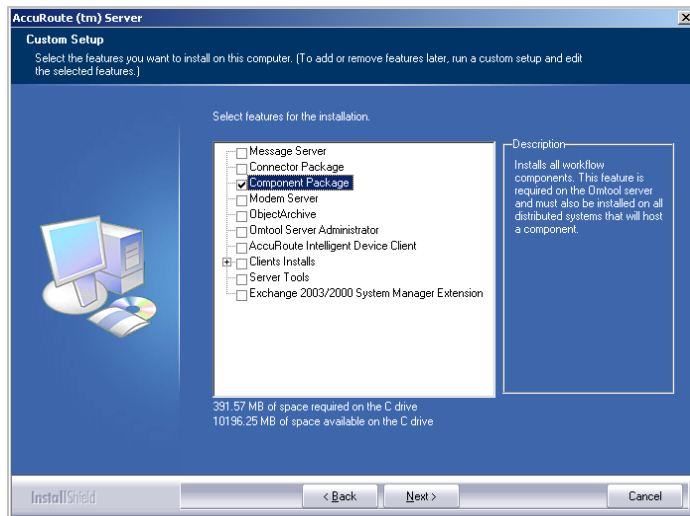**4**   Click **NEXT**. The setup shows the license agreement page.

5   Select **I ACCEPT THE TERMS OF THE LICENSE AGREEMENT**, and click **NEXT**.

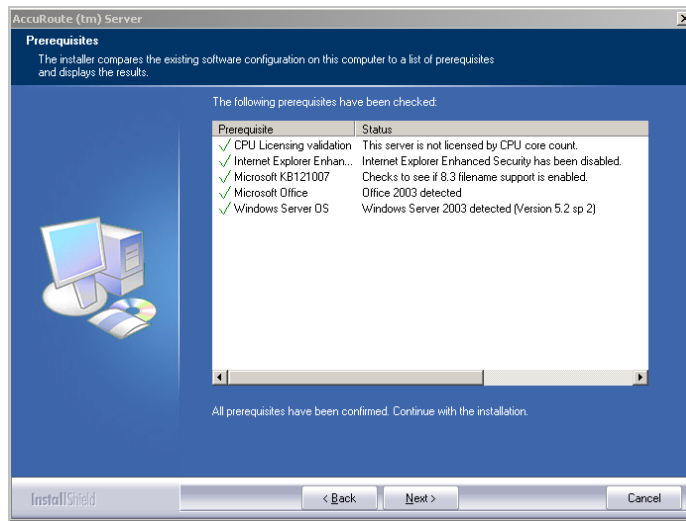The setup shows the installation options.

6   Select **CUSTOM** and click **NEXT**. The setup shows a list of AccuRoute features.

7   Select **COMPONENT PACKAGE**, clear all the other features you are not installing at this time.

8   Click **NEXT**.

The setup checks the system for installation requirements and displays the results.

Note The setup cannot continue until all required components are installed. (Double-click an item in the list for more information.) If any required components were not detected, click **CANCEL** and click **YES** to exit the setup and install the components that are required to complete the installation.

---

9   Click **NEXT** to continue the installation.

The setup requests logon credentials for the Omtool service account. The **NT Domain** and **User Name** fields are populated automatically based on the current Windows user.

10   Enter 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.

11   Click **NEXT**. The setup validates the user account and then shows installation settings.

Note If other installation features are included, the setup might request additional information before displaying installation
            settings.

12   Review the installation settings and click **NEXT** to start the installation. The setup installs the selected
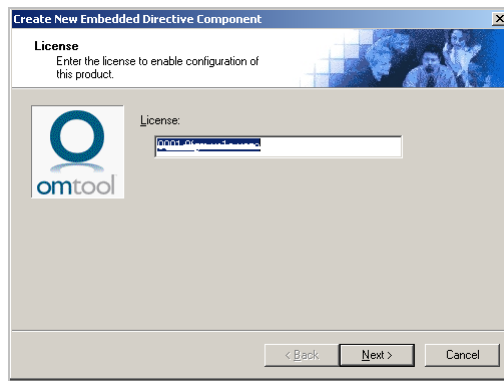   component and displays a message indicating that the installation is complete.

13   Click **FINISH**.

Now that Remote Embedded Directive Manager is installed on the remote system, add the new Embedded Directive
Manager component to the AccuRoute Server. Continue to Adding Remote Embedded Directive Manager to the
AccuRoute Server.

Adding Remote Embedded Directive Manager to the AccuRoute Server

To add Remote Embedded Directive Manager to the AccuRoute Server:

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

2   In the console tree, right-click **COMPONENTS** and select **NEW > EMBEDDED DIRECTIVE MANAGER COMPONENT**.

3   The Create New Embedded Directive Component wizard opens the License page. By default, the **LICENSE** text box is populated with the license key used to install the AccuRoute Server.

4   Delete the AccuRoute Server license and enter the license key for Remote Embedded Directive Manager in the **LICENSE** text box.

5   Click **NEXT**. The wizard opens the Server Address page.
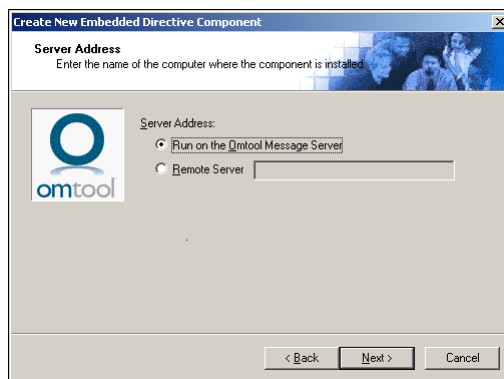
6   Select **REMOTE SERVER** option and enter the computer name or IP address of the system running Remote Embedded Directive Manager.

7   Click **NEXT**. The wizard verifies that Remote Embedded Directive Manager is installed and displays a message indicating that the configuration is complete.
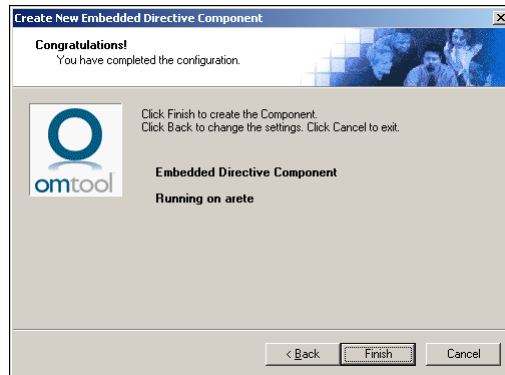
8   Click **FINISH**. The wizard adds the component to the components list in the details pane.

9   Restart the Omtool Component Manager service on the AccuRoute Server.

10   If removing the local instance of Embedded Directive Manager from the AccuRoute Server, continue to Removing Embedded Directive Manager.

Removing Embedded Directive Manager

Use the following procedure to remove Embedded Directive Manager from the AccuRoute Server or a remote system.

Note   Embedded Directive Manager on the AccuRoute Server can be removed only if a Remote Embedded Directive Manager exists.

To remove Embedded Directive Manager or Remote Embedded Directive Manager:

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

2   In the console tree, click **COMPONENTS**.

3   Right click the **EMBEDDED DIRECTIVE MANAGER** you want to remove and select **DELETE** from the drop down menu options.

        You are prompted to confirm that you want to delete the selection.

4   Click **YES** to continue. The component is removed from the list.

5   Restart the Omtool Component Manager service on the AccuRoute Server.

Section 13: Installing Remote AccuRoute Connector for DMS Libraries

This section includes:

Introduction to Remote AccuRoute Connector for DMS Libraries

The AccuRoute Connector for DMS Libraries routes documents from the server to your company document management system (DMS).

When routing an inbound document, the AccuRoute Connector for DMS Libraries creates a document ID and a pending document in the DMS. When the actual document arrives at the destination DMS server, the AccuRoute Connector for DMS Libraries locates the placeholder and replaces it with the actual document.

After installing the AccuRoute Server, you can create an AccuRoute Connector for DMS Libraries locally. The AccuRoute Connector for DMS Libraries that is installed on a remote system is called **Remote AccuRoute Connector for DMS Libraries**.

When scaling an environment with additional connectors or components, always consult an Omtool Technical Support engineer. For contact information, see Omtool Support and Sales. The Omtool Technical Support engineer can assist you in correctly identifying potential bottlenecks in the system based on workload and other factors. Moreover, the Support engineer can provide helpful information on the overall impact of increasing the speed and efficiency of the system. Performance and stability consulting are also available for a fee.

To purchase additional AccuRoute Connector for DMS Libraries licenses, contact an Omtool Sales representative. If a detailed analysis of the environment is necessary, the Omtool Technical Support engineer may recommend a fee-based consultation.

Requirements for Remote AccuRoute Connector for DMS Libraries

This section includes:

Hardware and software requirements

Remote AccuRoute Connector for DMS Libraries requires a system that meets the following minimum requirements:

❒   Windows NT domain computer that always runs in the same domain as the AccuRoute Server

❒   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

❒   Windows 2008 64 bit, 2003 Standard Edition SP2 64 bit

❒   DMS client application. The client application must be installed on the system where you are installing the remote DMS client.

Additional requirements

Remote AccuRoute Connector for DMS Libraries installation also requires the following:

❒   AccuRoute Server installation DVD (or access to a network copy of the AccuRoute Server setup)

❒   Windows user account that belongs to the AccuRoute Administrators group

❒   Purchased license key for Remote AccuRoute Connector for DMS

          Contact Omtool Sales for more information.

Installing Remote AccuRoute Connector for DMS Libraries

To install Remote AccuRoute Connector for DMS Libraries:

1   Log in to the system where you will install the Remote AccuRoute Connector for DMS Libraries using an account that belongs to the AccuRoute Administrators group.

2   Insert the AccuRoute Server installation DVD into a DVD-ROM drive. Alternately, navigate to the network where you have kept the AccuRoute Server setup files.

3   Run **\MESSAGESERVER\SETUP.EXE**.

      The InstallShield wizard opens and configures your system for installation and displays a welcome message.
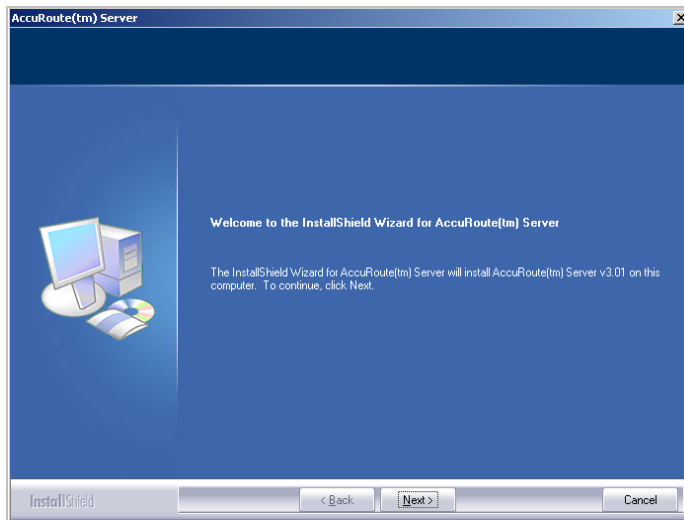
4   Click **NEXT**. The setup shows the license agreement page.

5   Select **I ACCEPT THE TERMS OF THE LICENSE AGREEMENT**, and click **NEXT**.

The setup shows the installation options.
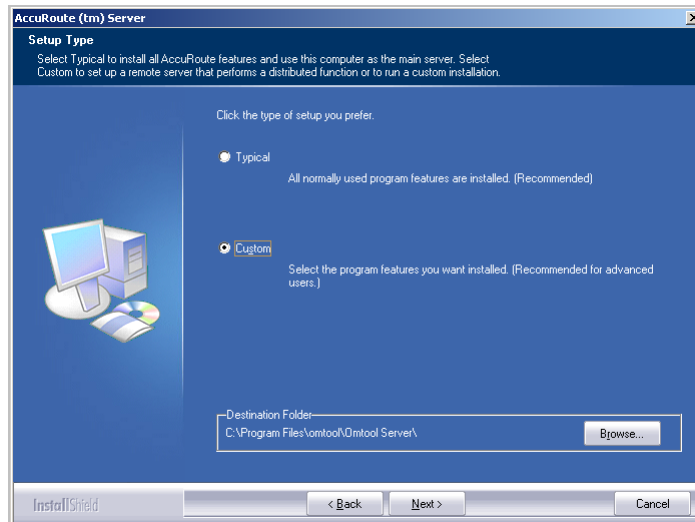
6   Select **CUSTOM** and click **NEXT**. The setup shows a list of AccuRoute features.

7   Select **CONNECTOR PACKAGE**, clear all the other features you are not installing at this time.

8   Click **NEXT**.

The setup checks the system for installation requirements and displays the results.

Note The setup cannot continue until all requirements are installed and configured. (Double-click an item in the list for more information.) If any required components were not detected, click **CANCEL** and click **YES** to exit the setup and install the components that are required to complete the installation.

9   Click **NEXT** to continue the installation.

The setup requests logon credentials for the Omtool service account. The **NT Domain** and **User Name** fields are populated automatically based on the current Windows user.

10 Enter the logon credentials of the Omtool service account.

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

    b In the **USER NAME** text box, enter the user name.

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

11 Click **NEXT**. The setup validates the user account and then shows installation settings.

Note If other installation features are included, the setup might request additional information before displaying installation settings.

12 Review the installation settings and click **NEXT** to start the installation. The setup installs the selected component and displays a message indicating that the installation is complete.

13 Click **FINISH**.

Now that Remote AccuRoute Connector for DMS Libraries is installed on the remote system, add the new AccuRoute Connector for DMS Libraries to the AccuRoute Server. Continue to Adding Remote AccuRoute Connector for DMS Libraries to the AccuRoute Server.
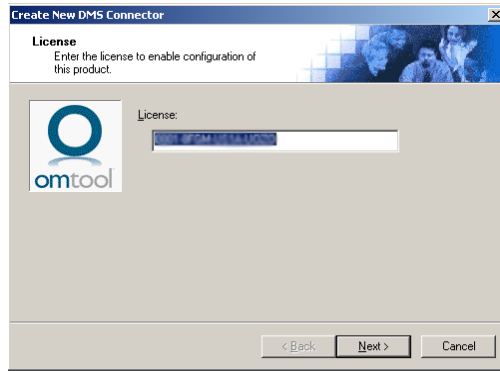
Adding Remote AccuRoute Connector for DMS Libraries to the AccuRoute Server

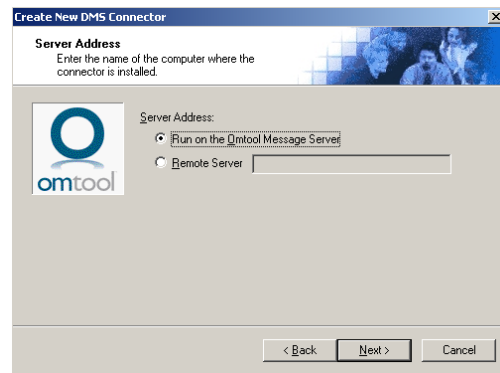**To add Remote AccuRoute Connector for DMS Libraries to the AccuRoute Server:**

1 In the system running the AccuRoute Server, click **START > ALL PROGRAMS > OMTOOL > OMTOOL SERVER ADMINISTRATOR** to open the Omtool Server Administrator.

2 In the console tree, right-click **CONNECTOR** and select **NEW > ACCUROUTE CONNECTOR FOR DMS**.

The **Create New DMS connector** wizard opens the **License** page. By default, the **LICENSE** text box is populated with the license key used to install the AccuRoute Server.

3   Delete the AccuRoute Server license and enter the license key for the connector in the **LICENSE** text box.

4   Click **NEXT**. The wizard opens the **Server Address** page.


5   Select **REMOTE SERVER** option and enter the computer name or IP address of the system running Remote AccuRoute Connector for DMS.

6   Click **NEXT**. The wizard verifies that Remote AccuRoute Connector for DMS Libraries exists and opens the **Display Name** page.
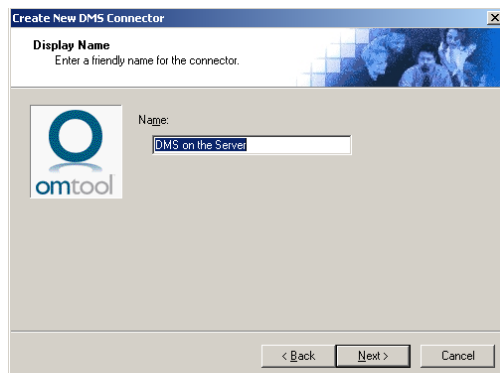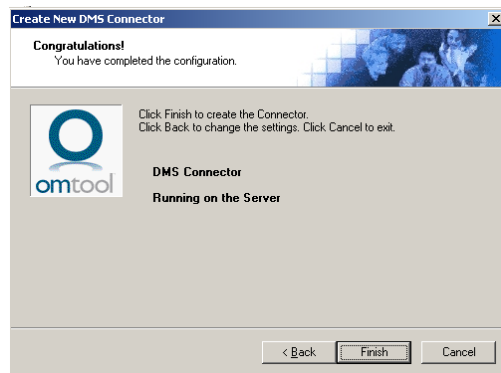

7   In the **NAME** text box, enter the name of the connector. The default is **DMS on the Server**.

If you are adding multiple connectors, enter a unique name for the connector.

8   Click **NEXT**. The **DMS Type** page opens.
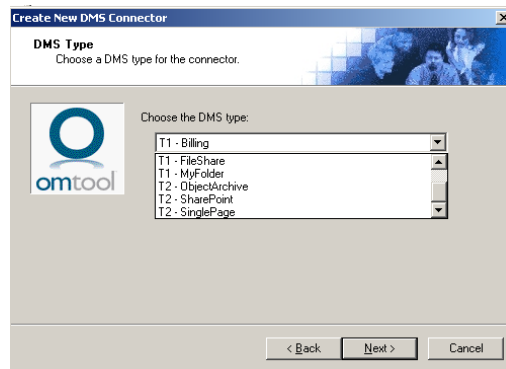
9   Choose the DMS type for your document management system. Click Next. You see the configuration complete message.

10   Click **FINISH**. The DMS Configuration wizard opens.

11   Configure as necessary.

         When configuration is complete, the connector is added to the connector's list in the details pane.

12   Restart the Omtool Connector Manager service on the AccuRoute Server.

Removing Remote AccuRoute Connector for DMS Libraries

Use the following procedure to remove Remote AccuRoute Connector for DMS Libraries:

         To remove Remote AccuRoute Connector for DMS Libraries:

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

2 In the console tree, click **CONNECTOR**.

3 Right click the **ACCUROUTE CONNECTOR FOR DMS LIBRARIES** that you want to remove and select **DELETE** from the drop down menu options.

  You are prompted to confirm that you want to delete the selection.

4 Click **YES** to continue. The connector is removed from the list.

5 Restart the Omtool Connector Manager service on the AccuRoute Server.

Section 14: AccuRoute Intelligent Device Client

This section includes:

Introduction to AccuRoute Intelligent Device Client

The AccuRoute Intelligent Device Client (formerly known as the Embedded AccuRoute for Intelligent Devices) is a a request handler for Omtool client applications. It comprises of a group of IIS web server extensions providing a layer for communication between the clients and the AccuRoute Server. For example, it allows a client like Ricoh Embedded Software Architecture (ESA) Device Client, to submit messages to the AccuRoute Server. It also allows the clients to pull up information about Embedded Directives from the server.

Figure 14-A: **The AccuRoute Intelligent Device Client environment**

AccuRoute Intelligent Device Client facilitates communication between the AccuRoute Server and other Omtool applications.

AccuRoute server — AccuRoute Intelligent Device Client — Omtool application

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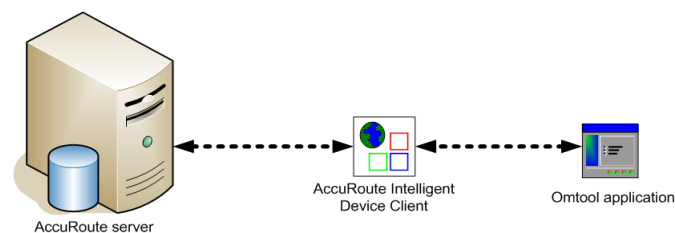
Note AccuRoute v2.3 and all later versions install the AccuRoute Intelligent Device client by default. No separate installation is necessary. You must configure the client and test it using instructions in this chapter.

If necessary, you can install the client on a remote system. For instructions, see Installing AccuRoute Intelligent Device Client on a remote system (14-9).

AccuRoute Intelligent Device Client components

The AccuRoute Intelligent Device Client helps the following client applications communicate with the AccuRoute Server.

- AccuRoute Desktop
- Embedded AccuRoute application like Embedded AccuRoute for HP and Embedded AccuRoute for Ricoh.

The AccuRoute Intelligent Device Client manages AccuRoute Desktop and the Embedded AccuRoute clients separately. Each category utilizes a unique web server extension, application pool, virtual directory and location.

The main components of the AccuRoute Intelligent Device Client environment are detailed in the following table.\

Table 1. Description of web server components with location and function

Component	Location	Function
ARDWebAPI	C:\Program Files\Omtool\ Omtool Server\WebAPI\ARDWebAPI	This folder is utilized for messages coming from AccuRoute Desktop. AccuRoute Desktop submits messages to ...\ARDWebAPI\FileTransfer. The messages are processed by OmISAPIU.DLL, other supporting DLL files, and XML-based configuration files in ...\ARDWebAPI\Scripts.
OmtoolWebAPI	C:\Program Files\Omtool\ Omtool Server\WebAPI\OmtoolWebAPI	This folder is utilized for Embedded AccuRoute Intelligent devices. • Applications like Embedded AccuRoute for HP Chai and Embedded AccuRoute for Ricoh submit messages to ...\OmtoolWebAPI\FilePostings. • Applications like Embedded AccuRoute for HP OXP, Embedded AccuRoute for Xerox EIP submit messages to ...\OmtoolWebAPI\FileTransfer The messages are processed by OmISAPIU.DLL, other supporting DLL files, and XML-based configuration files in ...\OmtoolWebAPI\Scripts.

IIS implementation

Web server extensions and application pools

During installation, the AccuRoute Intelligent Device Client creates and modifies web server extensions. It also creates the application pools.

The installation setup:

- Checks the status of the web server extension **WebDAV**. If it is not allowed to run, the setup changes its status to **Allowed**.

Note   WebDAV must be allowed to run; this is a requirement of AccuRoute Intelligent Device Client.

- Creates the web server extension **ARDWebAPI** for AccuRoute Desktop and sets its status to **Allowed**.

- Creates the web server extension **OmtoolWebAPI** for Embedded AccuRoute applications and sets its status to **Allowed**.

- Creates the application pool **ARDWebAPI** for AccuRoute Desktop.

- Creates the application pool **OmtoolWebAPI** for Embedded AccuRoute applications.

Dependencies

AccuRoute Intelligent Device Client runs under the World Wide Web Publishing Service in IIS 6.0, and has dependencies on the following web server extensions:

- WebDAV (WebDAV, or Web-based Distributed Authoring and Versioning, is a set of HTTP extensions that enables multiple users to edit and manage files on remote web servers.)

- ARDWebAPI

- OmtoolWebAPI

Important   The status of these web server extensions must be set to **Allowed** at all times.

IIS integration

AccuRoute Intelligent Device Client has a dual implementation — one for AccuRoute Desktop, and another for Embedded AccuRoute applications. Each has a unique web server extension, application pool, virtual directory, and location so that each implementation can be managed separately.

Table 14-A: **IIS implementation for AccuRoute Intelligent Device Client**

Function	Web server extension	Application pool	Virtual directory	Disk location
Enabling HTTP or Secure HTTP connection between AccuRoute Desktop and the AccuRoute Server	"ARDWebAPI" represents ...\omtool\ Omtool Server\ WebAPI\ ARDWebAPI\ Scripts\ OmISAPIU.DLL	Application Pools/ ARDWebAPI/	Default Web Site/ ARDWebAPI	...\omtool\ Omtool Server\ ARDWebAPI
Allowing Embedded AccuRoute applications on multifunction devices to connect to the AccuRoute Server	"OmtoolWebAPI" represents ...\omtool\ Omtool Server\ WebAPI\ OmtoolWebAPI\ Scripts\ OmISAPIU.DLL	Application Pools/ OmtoolWebAPI/	Default Web Site/ OmtoolWebAPI	...\omtool\ Omtool Server\ OmtoolWebAPI

For more information on IIS web server extensions, application pools, and virtual directories, consult the Windows documentation on IIS.

Message submission failures

AccuRoute Intelligent Device Client submits messages from an AccuRoute client application to the AccuRoute Server. Each application that requires AccuRoute Intelligent Device Client, handles submission failures differently. For more information on how submission failures are handled, consult the appropriate client documentation. (Go to Related documentation on 1-4.)

Optional configurations

Configuring HTTPs connectivity for AccuRoute Desktop

When AccuRoute Desktop must be able to connect to AccuRoute Intelligent Device Client using Secure HTTP connectivity, additional configuration is required. Set the FileTransfer property for AccuRoute Intelligent Device Client to HTTPS, and then test the secure connection.

Setting the FileTransfer property to HTTPS

AccuRoute Intelligent Device Client has a FileTransfer property for AccuRoute Desktop that defines the file transfer protocol used between clients and the web server. By default, the property is set to HTTP. To use Secure HTTP connectivity, set the FileTransfer property to HTTPS.

To set the FileTransfer property to HTTPS:

1   Go to **...\OMTOOL\OMTOOL SERVER\WEBAPI\ARDWEBAPI\SCRIPTS** and open `OmISAPIU.xml` in Notepad.

2   Locate the **FileTransfer** property and set the protocol type to https, for example, `<FileTransfer>https://172.16.10.48/ARDWebAPI/FileTransfer/</FileTransfer>`.

Verify that the URL includes the IP address of the web server running AccuRoute Intelligent Device Client. The computer name is not supported.

3   Save and close the file.

Testing the secure connection

Test the connection to the web server and verify that AccuRoute Intelligent Device Client accepts secure requests only. Run this test from any system in the LAN running AccuRoute Server or client software. (Before this test can be run, a certificate must be installed on the Default Web Site and SSL must be enabled. Go to Appendix B: Setting up a CA certificate using Microsoft Certificate Services and enabling SSL.)

To test the secure connection:

1   Start the browser and go to:
http://[web server]/ARDWebAPI/Scripts/OmISAPIU.dll?Action=GetConfiguration

where [web server] represents the host name or IP address of the web server.

*Note*   The Action command in the URL is case-sensitive.

The browser displays an error indicating that the page must be viewed over a secure channel.
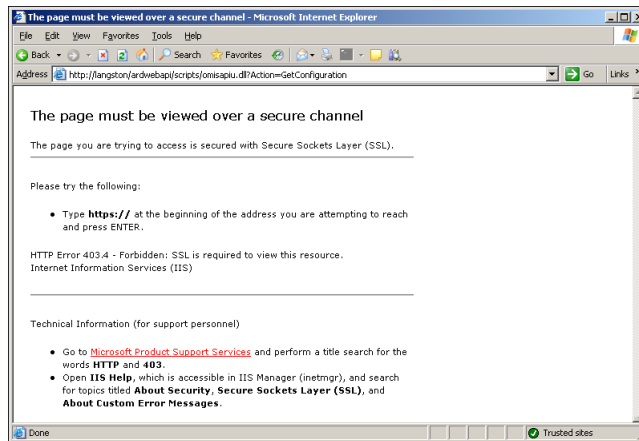
2   Go to the address bar and change http to https, and press **ENTER**.

If Internet Explorer displays a message indicating that this site is not trusted, add the site to the list of trusted sites and continue.

The browser loads the requested page.
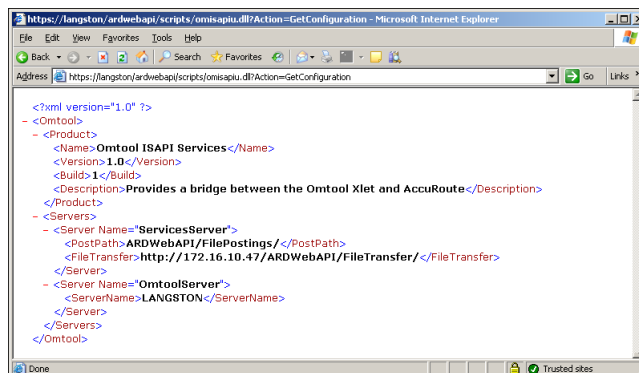
AccuRoute Intelligent Device Client is configured to use Secure HTTP connectivity with AccuRoute Desktop.

The AccuRoute Intelligent Device Client installation is complete.

Tip   The default directory security configuration can be modified if it does not comply with the security policy in the LAN. Go to Modifying the directory security configuration of virtual directories on 14-6.

Modifying the directory security configuration of virtual directories

The virtual directories created by the AccuRoute Intelligent Device Client setup grant the following access:

- authenticated access via integrated Windows authentication.

The default authentication and access control configuration can be modified if it does not comply with the security policy in the LAN. AccuRoute Intelligent Device Client supports all IIS authentication methods except .NET Passport and Digest Authentication for Windows Domain server, and also supports IP address and domain name restrictions.

Note After AccuRoute Intelligent Device Client is installed, the virtual directory properties are set to allow read access, allow execute permissions on scripts and executable, and use its associated application pool (ARDWebAPI or OmtoolWebAPI). Do not modify these settings.

Figure 14-A: **Default authentication and access control configuration for a virtual directory**

After AccuRoute Intelligent Device Client is installed, the authentication and access control configuration for the virtual directory enables anonymous access with the local IUSR account or the account specified during installation and enables integrated Windows authentication.
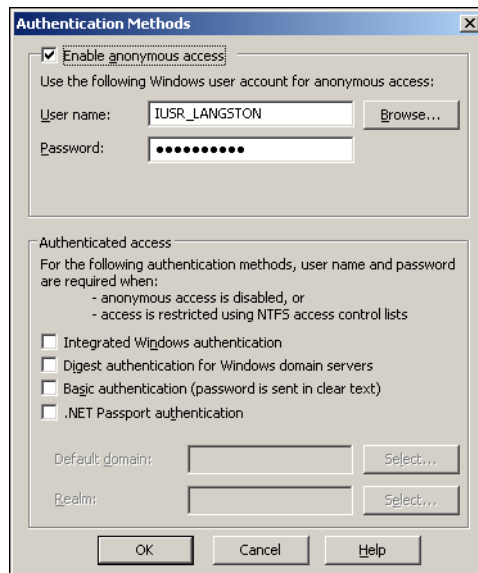
A modified configuration must meet the following conditions:

- If anonymous access is enabled, the account used for anonymous access must have full control to read and write to the folder. These permissions are configured in the Windows security settings on the folder.

- If integrated Windows authentication is enabled, all accounts used to post and download files, and gain access to the OmISAPIU.DLL resource, must have full control to read and write to the folder. These permissions are configured in the Windows security settings on the folder. For information on accounts that are used to post and download files, and gain access to the OmISAPIU.DLL resource, consult the Omtool documentation on the application being used in conjunction with AccuRoute Intelligent Device Client. (Go to Related documentation on 1-4.)

Testing and troubleshooting AccuRoute Intelligent Device Client

AccuRoute Desktop or an embedded AccuRoute application must be able to access the AccuRoute Intelligent Device Client configuration file OmISAPIU.DLL. Test the connection to the web server and verify that AccuRoute Intelligent Device Client is installed and configured correctly.

Test connectivity to AccuRoute Intelligent Device Client

Run this test from any system in the LAN that is running AccuRoute Server or client software.

To verify connectivity to AccuRoute Intelligent Device Client:

1   Log in to any system in the LAN running AccuRoute Server or client software.

2   Start the browser and go to:
https://[web server]/[virtual directory]/Scripts/OmISAPIU.dll?Action=GetConfiguration

where [web server] represents the host name or IP address of the web server and [virtual directory] represents the name of the virtual directory in IIS that is accessed by AccuRoute Desktop or Embedded AccuRoute applications.

Tip   A connection to AccuRoute Intelligent Device Client from a client running AccuRoute Desktop looks similar to: http://goliath/ARDWebAPI/Scripts/OmISAPIU.dll?Action=GetConfiguration

A connection to AccuRoute Intelligent Device Client from a device running an Embedded AccuRoute application looks similar to: http://goliath/OmtoolWebAPI/Scripts/OmISAPIU.dll?Action=GetConfiguration

---

When constructing the URL, consider the following:

▸   The Action command in the URL is case-sensitive.

▸   If Secure HTTP connectivity is configured for AccuRoute Desktop, replace HTTP with HTTPS.

The browser displays the basic configuration for the AccuRoute Intelligent Device Client.
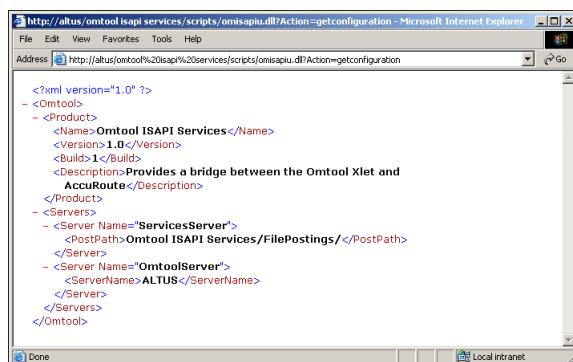
If an error occurs, troubleshoot the web server (Troubleshoot connectivity issues, 14-8) and repeat the test until it is successful.

Troubleshoot connectivity issues

Use the following table to identify and resolve connectivity issues.

Table 14-A: **Possible causes of connectivity issues with resolutions**

Issue description	Resolution
No connectivity to server.	A networking issue might be preventing access to the server. Ping the web server. If this test is successful but the connectivity issue remains, continue to the next issue.
World Wide Web service is stopped or disabled.	Open the Services applet on the web server and check the status of the World Wide Web service. If the service is stopped, verify that the service is enabled and then start it. Verify that the service is running before closing the Services applet.
	If the connectivity issue remains, continue to the next issue.
The Default Web Site is stopped in IIS.	Start IIS and expand the web server where AccuRoute Intelligent Device Client is installed. Expand the items in the console tree so that **DEFAULT WEB SITE** is visible. If the node is labeled **DEFAULT WEB SITE (STOPPED)**, right-click the node and select **START**.
	If the connectivity issue remains, continue to the next issue.
The IIS application pool for AccuRoute Intelligent Device Client is disabled.	Start IIS and go to [web server]>Application Pools>[application pool]. Right-click the appropriate application pool and select **START**.
	If the connectivity issue remains, continue to the next issue.
Execute permissions on the Scripts directory are inadequate.	Start IIS and go to [web server]>Default Web Site>[virtual directory]>Scripts. Right-click **SCRIPTS** and select **PROPERTIES**. IIS displays the Directory properties. Go to Application Settings and verify that **EXECUTE PERMISSIONS** is set to **SCRIPTS AND EXECUTABLES**.
	If the connectivity issue remains, check the Knowledge Base for technical articles that are helpful in troubleshooting the web server, and then contact Omtool Technical Support. (Go to Omtool Support and Sales on the inside front cover.)

Installing AccuRoute Intelligent Device Client on a remote system

The AccuRoute Intelligent Device Client is installed on the AccuRoute Server with a complete installation. You can install the AccuRoute Intelligent Device Client on a remote system when needed using the instructions in this section.

This section includes:

Requirements

This section includes:

Hardware and software requirements

The hardware and software requirements for the Remote AccuRoute Intelligent Device Client are as follows:

☐ A Windows NT domain system that runs in the same domain as the AccuRoute Server and is not a domain controller. If the system is in a different domain, it (the domain) must have bi-directional trust with the AccuRoute Server's domain.

☐ Pentium III-compatible processor; 1 GHz; 512 MB RAM; 500 MB available hard disk space; DVD-ROM drive; and Microsoft mouse or compatible pointing device

☐ Windows 2008 64 bit, 2003 Standard Edition SP2 (64 bit platforms). See Configuring IIS to run 32-bit applications for information on 64 bit systems.

☐ IIS with the following components: Common Files, World Wide Web Service, and Internet Information Services Manager

Requirements for AccuRoute Desktop

AccuRoute Intelligent Device Client supports HTTP and HTTPs connectivity to AccuRoute Desktop. For HTTPs connectivity, you must perform the following tasks prior to installing AccuRoute Intelligent Device Client on a remote system.

☐ Create and install a CA certificate on the Default Web Site in IIS.

Tip	To set up a CA certificate using Microsoft Certificate Services, go to Appendix B: Setting up a CA certificate using Microsoft Certificate Services and enabling SSL. For a CA certificate issued by a third party, use the certificate authority's instructions and apply the certificate to the Default Web Site in IIS.

❒ Enable SSL on the Default Web Site in IIS. (Go to Enabling SSL on the Default Web Site on B-15.)

Additional requirements

Remote AccuRoute Intelligent Device Client installation also requires the following:

❒ AccuRoute Server installation DVD (or access to a network copy of the AccuRoute Server setup)

❒ Windows user account that belongs to the AccuRoute Administrators group

Installing remote AccuRoute Intelligent Device Client

To install remote AccuRoute Intelligent Device Client:

1 Log in to the system using an account that belongs to the AccuRoute Administrators group.

2 Insert the AccuRoute Server installation DVD into a DVD-ROM drive. Alternately, navigate to the network where you have kept the AccuRoute Server setup files.

3 Run **\MESSAGESERVER\SETUP.EXE**.

The InstallShield wizard configures your system and displays the welcome message.
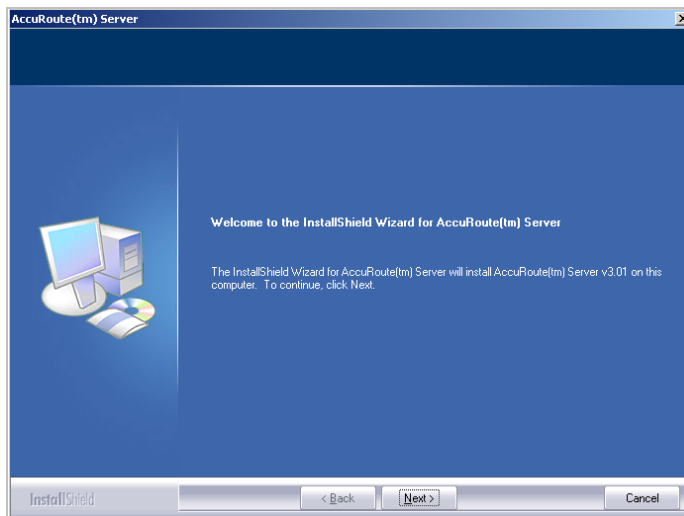
4 Click **NEXT**. The setup shows the license agreement page.

5   Read the agreement and select **I ACCEPT THE TERMS OF THE LICENSE AGREEMENT** option.

6   Click **NEXT**. The setup shows the installation options.
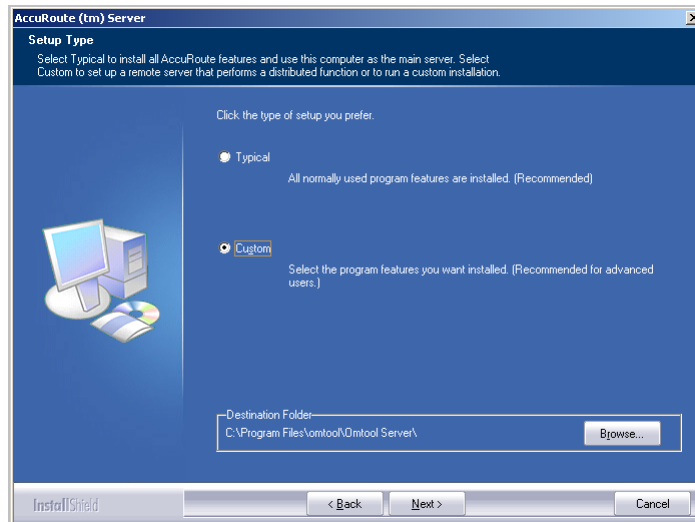
7   Select **CUSTOM**. Click **NEXT**. The setup shows a list of AccuRoute features.

8 Select **ACCUROUTE INTELLIGENT DEVICE CLIENT**. Clear any other feature you are not installing at this time.
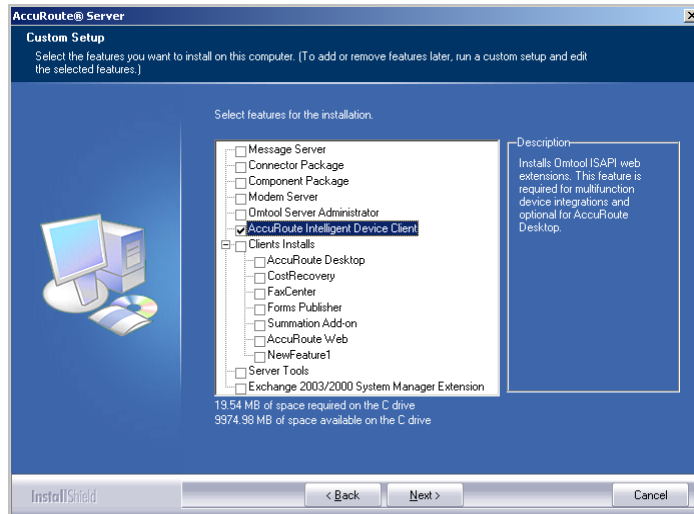
9 Click **NEXT**. The setup checks the system for installation requirements and displays the results.
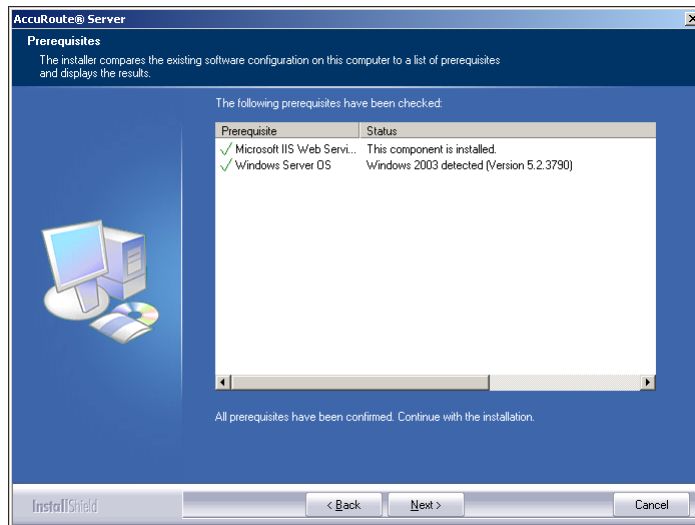
Note The setup cannot continue until all pre-requisite components are installed. (Double-click an item in the list for more information.) If any required components is missing, click **CANCEL** and exit the installation setup. Install the components, then install AccuRoute Intelligent Device Client.

---

10 Click **NEXT**. The setup shows installation settings.
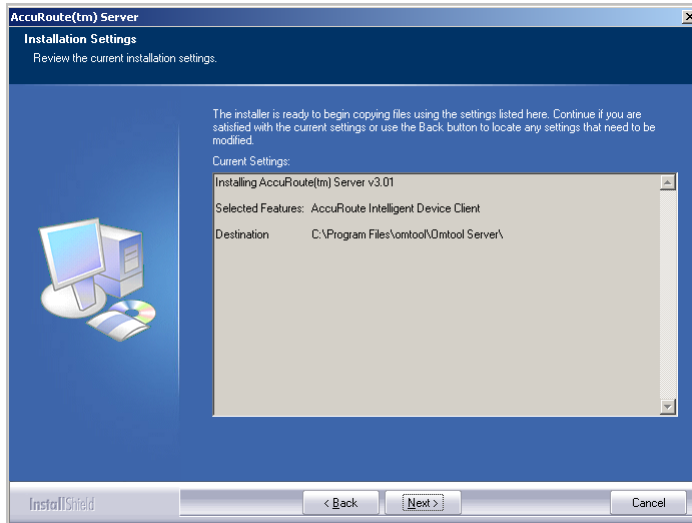
11 Review the installation settings. Click **NEXT** to start the installation.

The setup installs the selected component and displays a message indicating that the installation is complete.
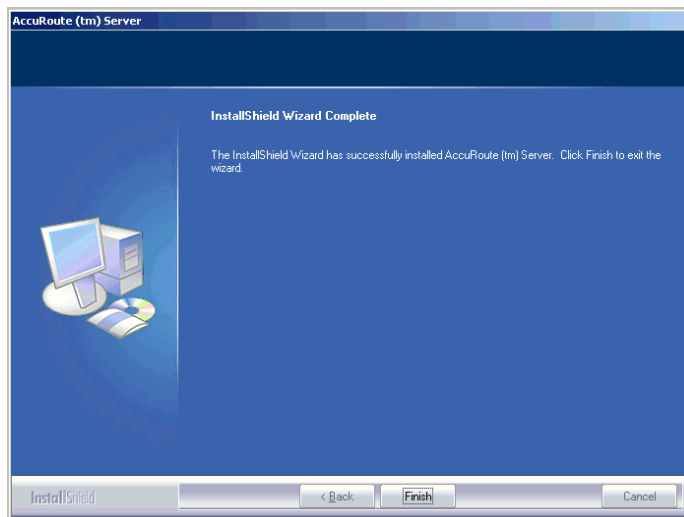
12 Click **FINISH**.

13 Continue to <u>Configuring the remote AccuRoute Intelligent Device Client</u>.

Configuring the remote AccuRoute Intelligent Device Client

Specifying the AccuRoute Server

When you install AccuRoute Intelligent Device Client on a remote machine, you must:

- Specify the IP Address of the AccuRoute Server in OmISAPIU.xml
- Edit the registry string that stores the location of the AccuRoute Server

To specify name or IP address of the AccuRoute Server in OmISAPIU.xml:

1 Go to **...\OMTOOL\OMTOOL SERVER\WEBAPI\ARDWEBAPI\SCRIPTS**.

2 Open **OmISAPIU.xml** for editing.

Note   If the server is part of a cluster, the following setting should be made in the file:
```
<Server Name="OmtoolServer"><ServerName>
Primary_Server_name</ServerName>

<Server Name="OmtoolServer"><ServerName>Secondary_Server_name</ServerName>
</Server>
```

---

3 Locate the **ServerName** node.

4 Specify the name or the IP address of the AccuRoute Server.

For example, `<ServerName>[IP Address]</ServerName>`.

5 Save and close the file.

6 Go to **...\OMTOOL\OMTOOL SERVER\WEBAPI\OMTOOLWEBAPI\SCRIPTS**.

7 Open OmISAPIU.xml for editing.

8 Locate the **ServerName** node.

9 Specify the name or the IP address of the AccuRoute Server.

For example, `<ServerName>12.123.4.5</ServerName>`.

10 Save and close the file.

Adding the application pool logon account to the AccuRoute Admins group

There are two application pools (ARDWebAPI and OmtoolWebAPI) managing the worker processes handling requests from other Omtool client applications. By default, they run as Local System.

Note	If the security policy in the LAN does not permit the application pool to run as Local System, the application pool identity can be reconfigured using any account that belongs to the Domain Users group.
	If you change your login to a network account, Integrated Windows Authentication will not work for the virtual directories that use the application pool. The work around requires kerberos protocol changes in the active directory.

If necessary, modify the application pool identity. For instructions, consult the Windows documentation on IIS:

http://www.microsoft.com/technet/prodtechnol/WindowsServer2003/Library/IIS/c9b5db6f-874e-4ec9-93ed-1733367c117b.mspx?mfr=true

- If AccuRoute Intelligent Device Client is installed on a remote system, add the application pool logon account to the AccuRoute Admins group which has the required Distributed COM permissions to communicate with the AccuRoute Server. For instructions, see (Also see Creating AccuRoute Admins group on 2-6.)

- If AccuRoute Intelligent Device Client is installed on the AccuRoute Server and both application pools run as Local System, skip this step.

Other configurations

Other configurations include:

- Configuring HTTPs connectivity issues for AccuRoute Desktop

- Modifying the directory security configuration of virtual directories (optional).

For instructions, see Optional configurations (14-4).

Removing remote AccuRoute Intelligent Device Client

Before you remove the AccuRoute Intelligent Device Client, remove all other applications in the LAN that require/use the AccuRoute Intelligent Device Client. Then remove AccuRoute Intelligent Device Client.

For information on removing Omtool applications that require AccuRoute Intelligent Device Client, consult the Omtool documentation on the application. (Go to Related documentation on 1-4.)

AccuRoute Intelligent Device Client is not required for AccuRoute Desktop but can be used to establish a connection to the AccuRoute Server using HTTP or Secure HTTP. After AccuRoute Intelligent Device Client is removed, AccuRoute Desktop can still connect to the AccuRoute Server using DCOM. This requires reconfiguration. For configuration instructions, consult the AccuRoute Desktop installation guide. (Go to Related documentation on 1-4.)

To remove AccuRoute Intelligent Device Client from a remote system:

1 Click **START > CONTROL PANEL > ADD OR REMOVE PROGRAMS** to open the **Add or Remove Programs** page.

2 Select **ACCUROUTE SERVER** and click **CHANGE/REMOVE**. The InstallShield wizard is initialized and it shows the following message.
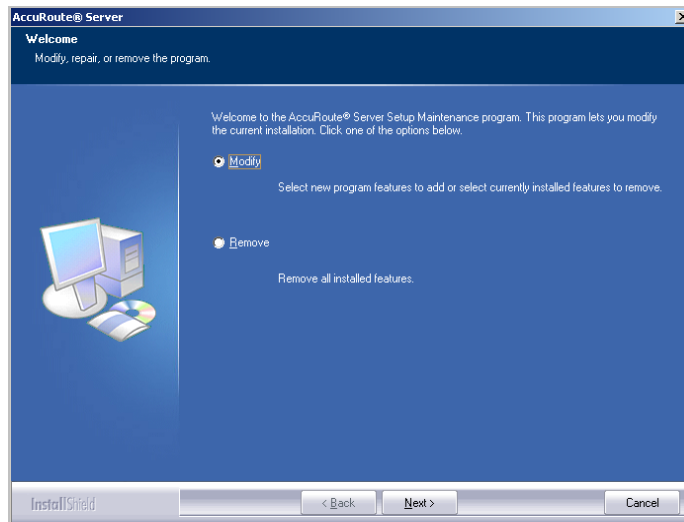
3 Select **REMOVE** option and click **NEXT**.

4 Follow the prompts to remove AccuRoute Intelligent Device Client.

During installation, AccuRoute Intelligent Device Client allows the IIS web server extension WebDAV to run. After AccuRoute Intelligent Device Client is removed, WebDAV is still allowed to run. If WebDAV should be prohibited from running, change the status of this web server extension to Prohibited. For more information, consult the Windows documentation on IIS.

Appendix A: Setting up an AccuRoute Server cluster

This section includes:

Introduction to Failover

Automatic failover, a native AccuRoute capability, ensures seamless and immediate recovery from a localized system failure on the AccuRoute Server. It requires two redundant AccuRoute Servers that are joined to form an AccuRoute Server cluster, and a third system where critical server resources are stored.

The redundant AccuRoute Servers are referred to as the "active server" and "passive server", the active server being the current AccuRoute Server and the passive server being the standby server. The third system that stores critical resources is called the "database server" because it hosts the server databases along with server configuration files. If the AccuRoute Server is enabled for faxing, the database server also hosts the telco share which is an intermediary repository for inbound and outbound faxes. (The database server can also function as a remote server such as Remote Administrator, Remote Composer, Remote Embedded Directive Manager, or Remote Modem Server.)

Figure A-A   **Basic setup of the AccuRoute Server cluster**

An AccuRoute Server cluster has two redundant AccuRoute Servers referred to as the active server and passive server, and a third system that stores critical AccuRoute Server resources called the database server.
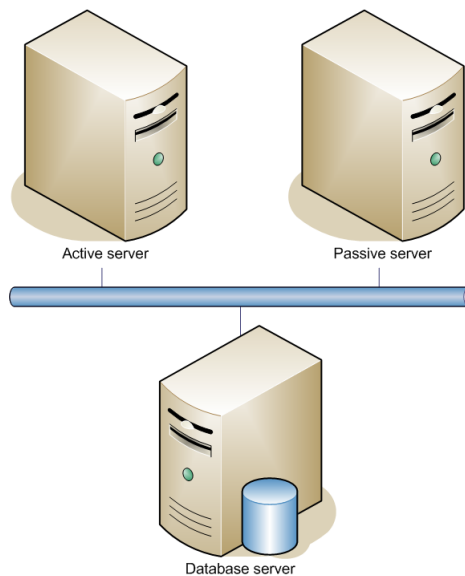
Failover is driven by the Omtool Cluster Manager service which is installed on the AccuRoute Server. (This service does not appear in the Services applet because it is not registered by default.) When an AccuRoute Server cluster is created, this service is immediately registered and runs simultaneously on both AccuRoute Servers in the cluster. During regular operation, the active server in the AccuRoute Server cluster continuously writes to the server databases while Omtool Cluster Manager service on the passive server polls the database server in 45-second intervals to verify that the active server remains active.

When a localized system failure occurs on the active server, it loses communication with the database server and cannot write to the server databases. As soon as the Omtool Cluster Manager service on the passive server polls the database server again and finds no recent activity from the active server, the Omtool Cluster Manager service on the passive server starts all its local Omtool services and becomes the active server in the cluster. The transition is complete within 1 to 3 minutes of the failure.

After a failure occurs, an administrator needs to restore the server that is offline.

Tip   Omtool Server Monitor is a monitoring application that detects failures on AccuRoute Servers. Omtool recommends that Omtool Server Monitor or another monitoring application be used to alert administrators that a failure has occurred so that failures can be corrected in a timely manner.

Figure A-B   **AccuRoute Server cluster in failover mode**

An AccuRoute Server cluster enters failover mode when a localized system failure causes the current AccuRoute Server to go offline and the other server to become active.
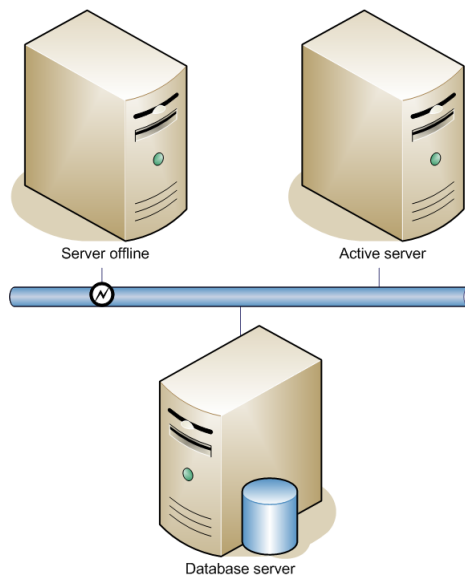
An AccuRoute Server in the cluster can be designated as the preferred server. If an AccuRoute Server is preferred, it is always the active server whenever it is available. Therefore, if a system failure occurs and the preferred server goes offline, the non-preferred server becomes active, but when the preferred server is online again, it becomes the active server and the non-preferred server returns to a standby state.

Clustering and Composer Thread Awareness

In a typical configuration, you use the local Composer on the primary server and the Remote Composer on the failover server. So, in real terms, you have two Composers after a failover. However since both the local and remote Composers are on the same physical machine, using them simultaneously can cause significant performance issues on heavily loaded servers if the total thread count of both Composers exceeds the available CPU/core count of the failover machine.

Requirements for an AccuRoute Server Cluster

This section includes:

AccuRoute Server Requirements (A-4)

Database Server Requirements (A-4)

AccuRoute Server Requirements

The two AccuRoute Servers must meet the minimum requirements for an AccuRoute Server. For details, see [Hardware and software requirements](#) (2-1).

> *Note* The AccuRoute Servers should have identical and redundant configurations. If resources are shared, for example, a Remote Composer, the shared resource should be installed on the database server or another high availability system in the domain.

Database Server Requirements

The database server must meet the following minimum requirements:

- ❒ requirements for the AccuRoute Server [Hardware and software requirements](#) (2-1)

- ❒ Microsoft SQL Server 2008, 2005

> *Note* Microsoft SQL Server 2008 Express Edition does not meet this requirement.

Setting up the Database Server

This section includes:

Creating Folders for AccuRoute Server Resources

Use the following procedure to create folders for the AccuRoute Server resources being stored on the database server.

To create folders on the database server for AccuRoute Server resources:

1 Log in to the system as an Administrator.

2 Choose a location in the local directory structure and create the following folders:

  ‣ **Messages** - Stores the message database.

  ‣ **Config** - Stores server configuration files.

  ‣ **Locks** - Stores objects in use.

3 Share each folder.

4 Give the Omtool service account read, write, and delete permissions to each folder. For more information on modifying permissions, consult Windows help.

Creating the Telco Share

Note	Complete the following procedure if the AccuRoute Server cluster supports faxing,

For an AccuRoute Server cluster that supports faxing, create the telco share. The telco share is shared by both servers in the cluster. You must create it on any high availability system, such as the database server belonging to the same domain as the clustered AccuRoute Servers.

To create the telco share on the database server:

1 Choose a location in the local directory structure and create a folder for the telco share. Use a self-descriptive name such as omtooltelcoshare.

2 Share the folder.

3 Give the Omtool service account read and write permissions to the folder. For more information on modifying permissions, consult Windows help. (If environment has AccuRoute Servers that were installed with different Omtool service accounts, give all Omtool service accounts these permissions.)

Setting up the Active Server

This section includes:

Installing the AccuRoute Server

Install the AccuRoute Server. For instructions, see Installing the AccuRoute Server (3-2) When specifying a location for the message database, enter the name of the database server.

Configuring the AccuRoute Connector for Telco to Use the Telco Share on the Database Server

To configure the AccuRoute Connector for Telco to use the telco share on the database server:

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

2   In the console tree, click **CONNECTORS**.

3   Double click the **AccuRoute Connector for Telco** in the details pane to open the **Telco** properties page.

4   Click **ADVANCED** to open the **Telco Advanced Properties** page.
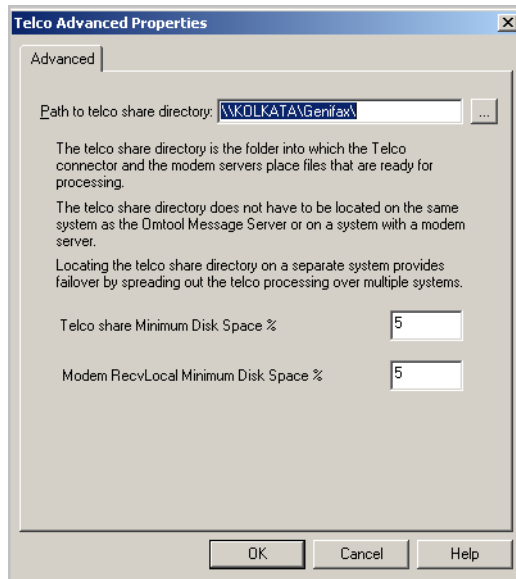
5   In the **PATH TO TELCO SHARE DIRECTORY** text box, enter the UNC path (that is the \\ServerName\ShareName)\ to the telco share folder. Add a trailing backslash at the end. (For example `\\123.4.5.678\telcoshare\`).

6   Click **OK** and then **OK** to save your changes and close the **Properties** page.

Moving AccuRoute Server Resources and Redefining Logicals

Move the contents of the Messages, Config, Locks and Languages folders to the database server, and then modify the logicals on the AccuRoute Server that define the location of the Messages, Config, Locks and Languages folders.

Moving contents from AccuRoute to database server

To move the contents of the Messages, Config, and Locks folders from the AccuRoute Server to the database server:

1   Log in to the AccuRoute Server using the Omtool service account.

2   Go to ...**OMTOOL\OMTOOLSERVER**.

3   Open **\CONFIG** on the AccuRoute Server and copy all the files, and paste them to **\CONFIG** on the database server.

4   Repeat the copy and paste for **\MESSAGES** and **\LOCKS** folders. (These folders might not contain files.)

Continue to the next procedure and modify the logicals on the AccuRoute Server that define the locations of these folders.

Redefining logicals on the AccuRoute Server

To redefine the logicals on the AccuRoute Server that represent the Messages, Config, and Locks folders:

1   Stop all Omtool services (Om*) on the AccuRoute Server.

2   Run **REGEDIT**.

3   Go to:

     HKEY_LOCAL_MACHINE\SOFTWARE\OMTOOL\GENIFAX\CURRENT VERSION\LOGICALS.

4   Edit **MESSAGES** and **MESSAGES_UNC** by specifying the path to **\MESSAGES** on the database server.

5   Edit **CONFIG** by specifying the path to **\CONFIG** on the database server.

6   Edit **LOCKS** by specifying the path to **\LOCKS** on the database server.

7   Edit **LANGUAGES** by specifying the path to **\LANGUAGES** on the database server.

8   Close the Registry Editor.

9   Restart all Omtool services (Om*).

Now that the active server setup is complete, verify that you can send and receive messages. Use the same send and receive methods that are being deployed to users. For example, if users send messages using AccuRoute Desktop, install an instance of AccuRoute Desktop and verify that a user can send messages and that the AccuRoute Server delivers them correctly. Then set up the passive server.

Note   It is very important that Accuroute Views folder should be on a system that is always available such as the Database server

Setting up the Passive Server

To set up the passive server, follow the setup procedures for the active server with these special instructions:

1   [Installing the AccuRoute Server](#) (A-5)

Important   The passive server setup creates a database, but the AccuRoute Server cluster does not utilize this database. Both AccuRoute Servers in the cluster share the database that was created on the database server when the active server was set up. The database server should not be used to setup database for the passive server.

The server configuration wizard starts after AccuRoute Server installation is complete.

2   Exit the server configuration wizard and select **NO** when prompted to run the wizard again when Omtool Server Administrator starts.

Note   Both AccuRoute Servers in the cluster are configured to use the configuration settings that already exist on the database server.

3   Create a local Composer following the instructions below:

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

    b   In the console tree, click **COMPONENTS**.

    c   Double click **COMPOSE** in the details pane to open the Compose **Properties** page.

    d   Click **COMPOSERS** to open the Composers page.

e Click **ADD**, enter `localhost` in the **Server Address** field.

Properties for Compose

| General | Conversions | Document Splitting |
| Compression | OCR | Engines | Composers | Journal |

Enabled | Server Address | Description | Add

Add Composer Package

Server Address: localhost

License key:

OK Cancel

OK Cancel Help
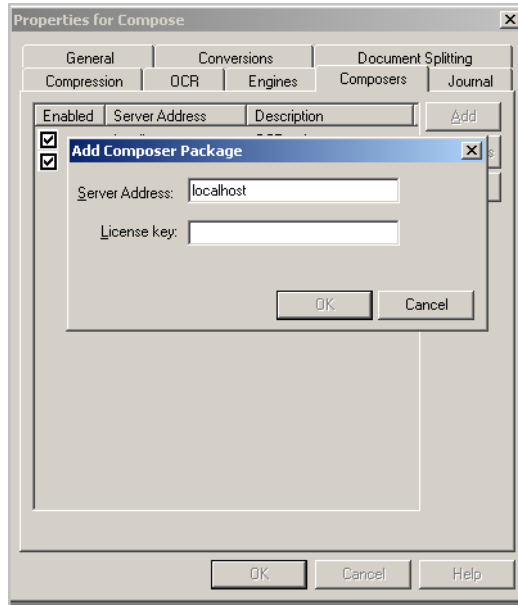
f Click **OK** and then **OK** again to save your changes.

g Close the Omtool Server Administrator.

Enabling Failover

To enable failover, set up an AccuRoute Server cluster.

To set up an AccuRoute Server cluster:

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

2 In the console tree, select and right click the passive AccuRoute Server and select **PROPERTIES**.

Note You must select the passive AccuRoute Server in the cluster because the passive server is in a standby state when the active server is available.

3   Click **Cluster** and then click **SET UP CLUSTER**.

The **Set Up Cluster** page opens.

4   Under the **Specify the server to join with** section, enter the name of the preferred server in the **NAME** text box,.

5   Under the **Specify the credentials to use for the Cluster Manager Service** section, enter the logon credentials for the Omtool service account.

6   Click **FINISH**.

The Omtool Server Administrator connects to the preferred server and creates the cluster.

7   Click **OK** to save the changes to the server properties.

8   Restart the active server and verify that the Omtool Cluster Manager process (OMSvrClusterMgr) and the connector processes (OmCon*) are running.

9   Restart the passive server and verify that the Omtool Cluster Manager process (OMSvrClusterMgr) is running.

Testing the Failover Configuration

To test the failover configuration, simulate a localized system failure on the active server.

To simulate a localized system failure on the active server:

1   **Simulate a failure:** Shut down the active server. Wait approximately five minutes, and then verify that the Omtool Cluster Manager process (OMSvrClusterMgr) and the connector processes (OmCon*) are running on the other server, which is now the active server.

2   **Restore the failed server:** Start the server that was shut down and wait for it to boot up.

Wait approximately five minutes, and then verify that the Omtool Cluster Manager process (OMSvrClusterMgr) and the connector processes (OmCon*) are running.

Disabling SMB2 on Windows 2008 AccuRoute Server Cluster

When using a remote Windows 2008 system, Omtool recommends that you disable SMB2 on the AccuRoute Server systems.

Note	This is a required configuration recommended for AccuRoute Cluster.

If you do not disable SMB2, you will notice that on sending any file after changing the "Config", "Messages" and "Locks" folder path to point to the remote Windows 2008 system, composing a document fails and shows the following error:

```
Compose error: Failed to save the Final form attachment
```

To disable SMB2 on the AccuRoute Server systems:

1   Open a command prompt on the primary Windows 2008 AccuRoute Server system.

2   Run "regedit" and then expand and locate the sub tree as follows.

     HKLM\SYSTEM\CURRENTCONTROLSET\SERVICES\LANMANSERVER\PARAMETERS

3   Add a new **REG_DWORD** key with the name of **SMB2** and configure as shown below:

     VALUE NAME: Smb2

     VALUE TYPE: REG_DWORD

     where 0 = disabled and 1= enabled

4   Set the value to 0 to disable SMB 2.0.

     If you need to re-enable SMB 2.0, you can set the value to 1.

5   Close all open dialogs and reboot the server.

6   Follow the same procedure in steps 1 to 6 and disable SMB2 on the secondary Windows 2008 AccuRoute Server system.

Appendix A: Setting up an AccuRoute Server cluster

Appendix B: Setting up a CA certificate using Microsoft Certificate Services and enabling SSL

Requirements for setting up a CA certificate

The following requirements must be met when setting up a CA certificate:

❒   web server that meets the requirements for AccuRoute Intelligent Device Client. For instructions on installing AccuRoute Intelligent Device Client, see Installing AccuRoute Intelligent Device Client on a remote system (14-9)

❒   Windows user account that belongs to Domain Administrators group

❒   Windows installation CD

Installing the Certificate Services component

These instructions are specific to Windows 2003.

> *Important*   This Windows Components Wizard temporarily stops IIS. Plan the installation accordingly.

To install the Certificate Services component:

1   Go to Control Panel and start **ADD OR REMOVE PROGRAMS**.
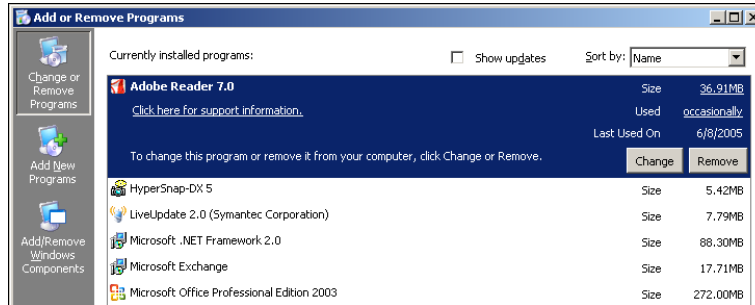
2   Click **ADD/REMOVE WINDOWS COMPONENTS**.

The **Windows Components Wizard** starts.
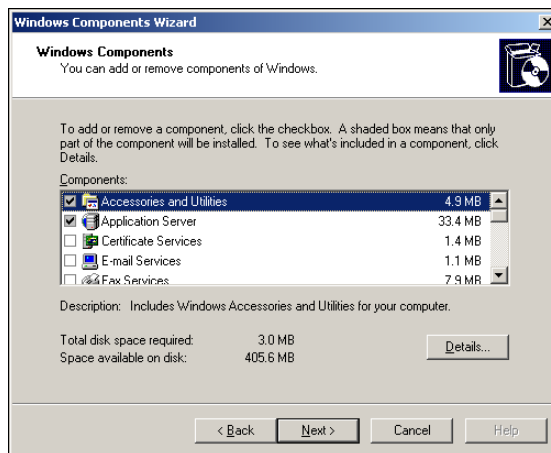
3   Select **CERTIFICATE SERVICES**. A message box opens.
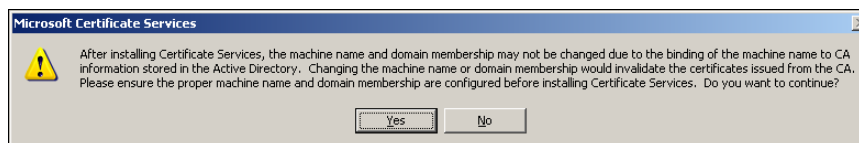
4   Read the message and click **YES**.
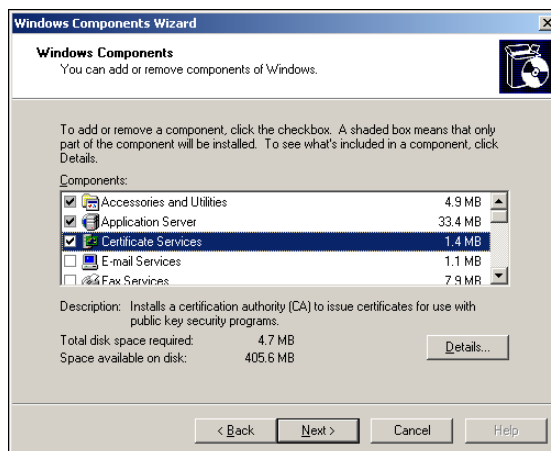
5   Click **NEXT**. The CA Type window shows the CA options.
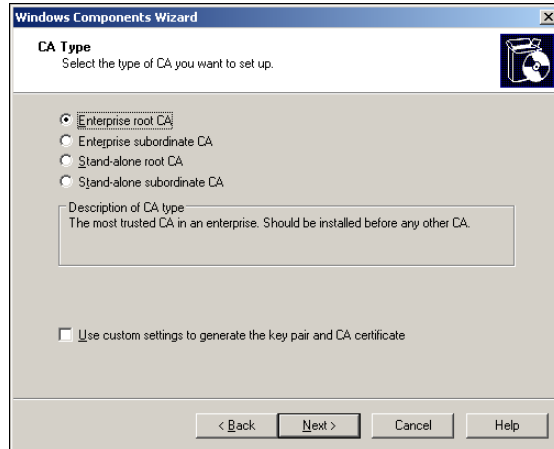
6   Verify **ENTERPRISE ROOT CA** is selected and click **NEXT**. The **CA Identifying Information** page shows details about the CA.
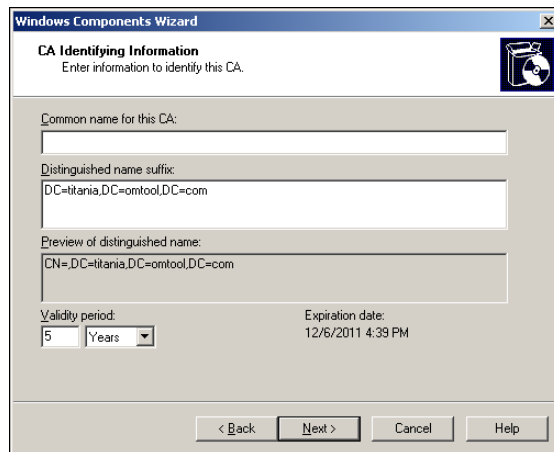
7   In the **COMMON NAME FOR THIS CA** text box, enter a common name for the CA and click **NEXT**. The **Certificate Database Settings** page shows default locations for the certificate database and certificate database log.
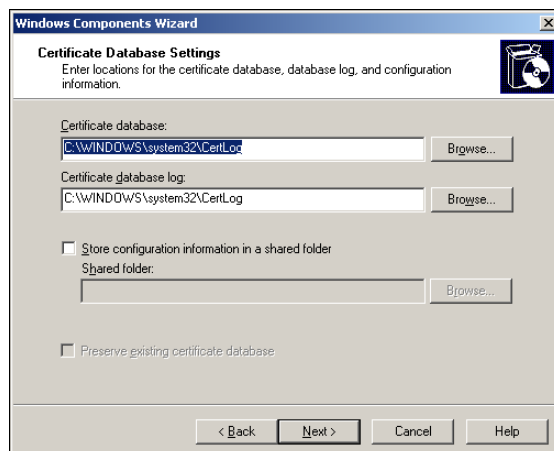
8   Click **NEXT**. A message indicates that the installation stops IIS temporarily.
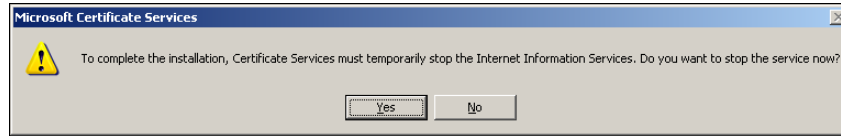
9   Click **YES**. A message indicates that the Windows CD or network access to the setup files is required.
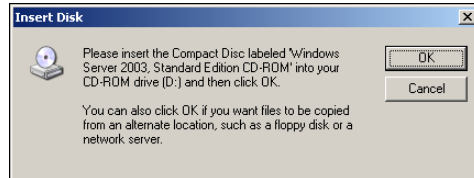
10   Click **OK** and locate the files that are required to complete the installation.

11   Click **OK** again.

The Windows Components Wizard displays a message indicating that the component is installed successfully.
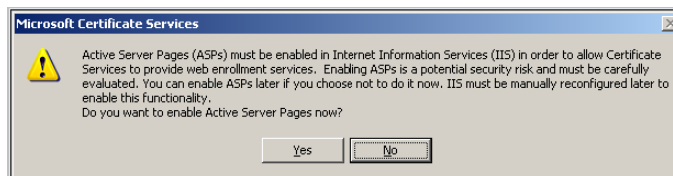
12   Click **YES** on the message. The **Installation Completed** page opens.

13   Click **FINISH**.

Certificate Services is now installed.

Creating a CA certificate request

To request a CA certificate:

1   Start IIS and locate the Default Web Site in the console tree.
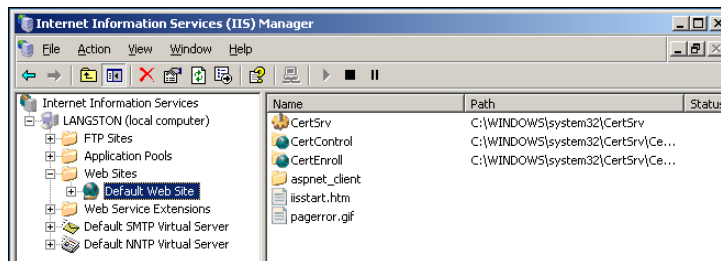
2   Right-click **DEFAULT WEB SITE** and select **PROPERTIES**.
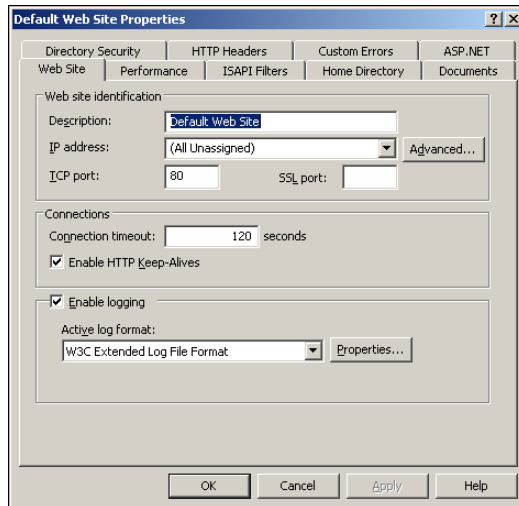
3   Click **DIRECTORY SECURITY**.
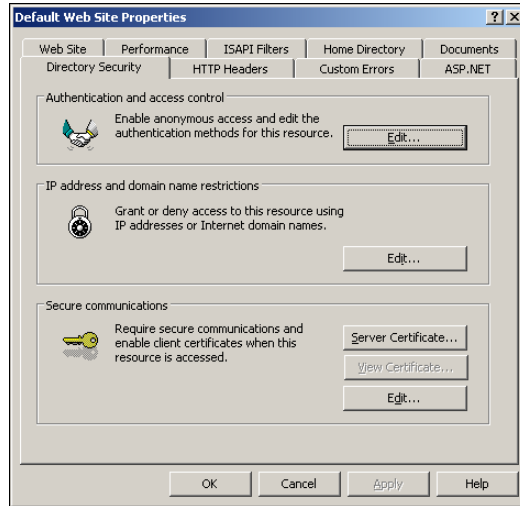
4   In the **Secure communications** section, click **SERVER CERTIFICATE**. The certificate wizard opens and shows a welcome message.

5   Click **NEXT**. The **Server Certificate** page opens.
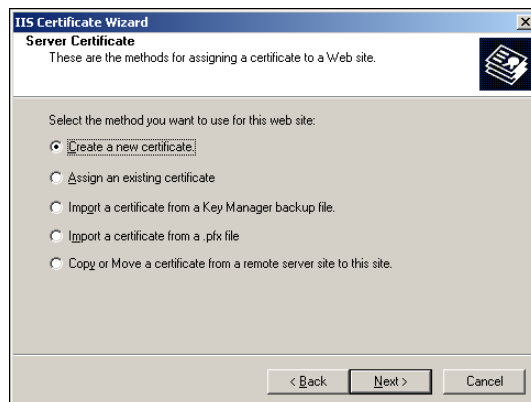
6   Verify that **CREATE A NEW CERTIFICATE** option is selected and click **NEXT**. The **Delayed or Immediate Request** page opens.

7   Verify that the **PREPARE THE REQUEST NOW, BUT SEND IT LATER** option is selected.
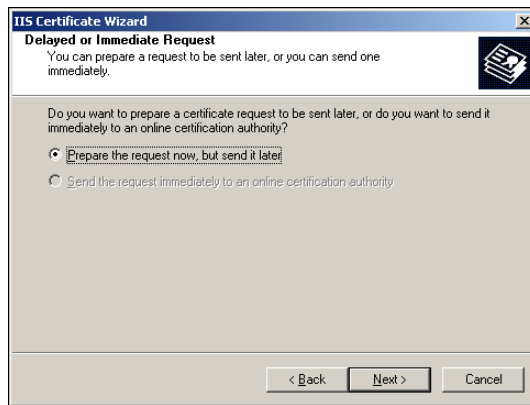
8   Click **NEXT**. The **Name and Security Settings** page opens.
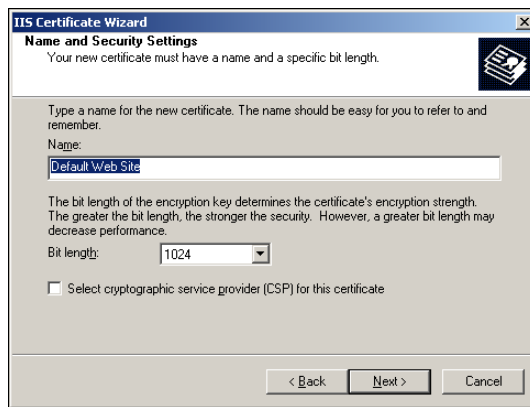
9   Enter a friendly name for the certificate and click **NEXT**. The **Organization Information** page opens.
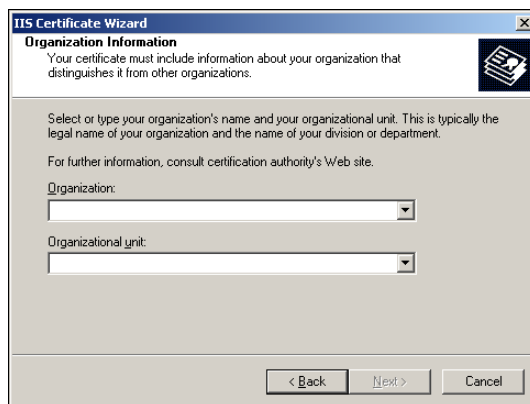
10   Enter the organization name and organizational unit name and click **NEXT**. The Y**our Site's Common Name** page opens.
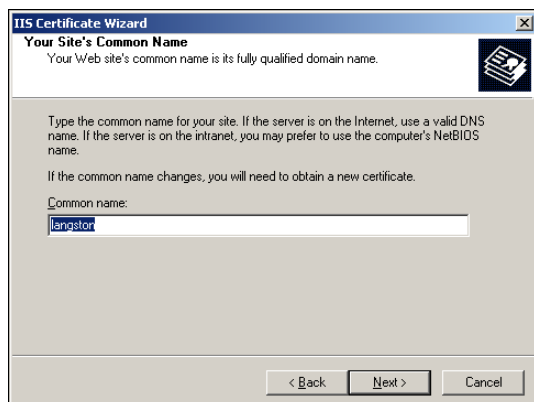
11 Enter the common name of the web site and click **NEXT**. The **Geographical Information** page opens.
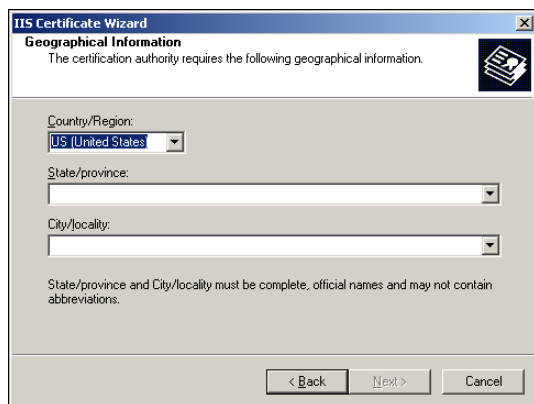
12 Select the country/region, and enter the state/province, and city/locality information, and click **NEXT**. The **Certificate Request File Name** page opens.
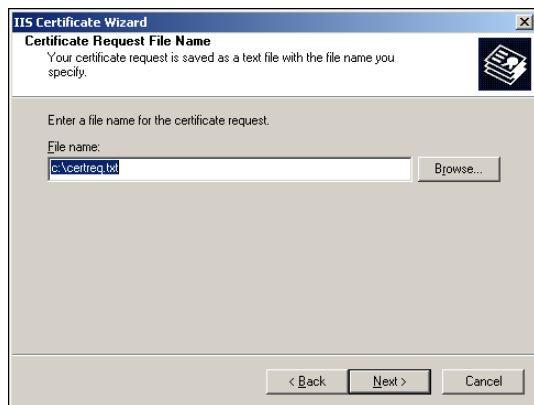
13 Change the location and file name for the certificate request if necessary, and then click **NEXT**. The **Request File Summary** page opens.
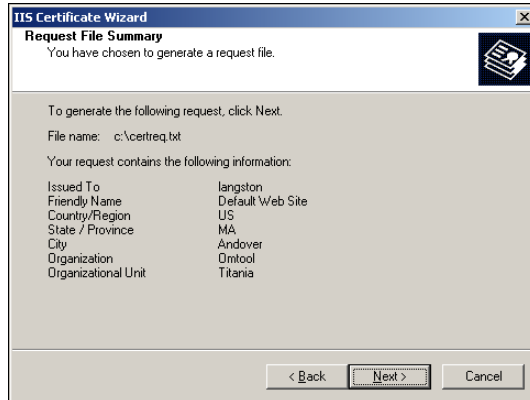
14   Review the request details and click **NEXT**. The CA certificate request is created. When the creation
            process is complete, the following page opens.
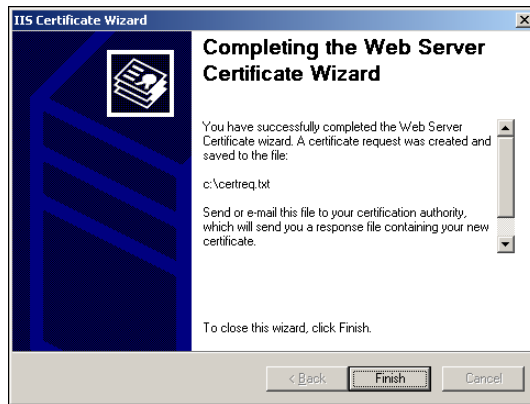
15   Click **FINISH**.

16   Click **OK** to close the **Default Web Site Properties** page.

            The certificate request is saved to a file.

Requesting the CA certificate

            To request the CA certificate:

1   Start the browser and go to `http://[web server]/certsrv`.

            ‣   If prompted to enter user credentials to access this site, enter the username and password of an
                account that belongs to the Domain Administrators group on the web server.

            ‣   If Internet Explorer displays a message indicating that this site is not trusted, add the site to the list
                of trusted sites and continue.

Appendix B: Setting up a CA certificate using Microsoft Certificate Services and enabling SSL
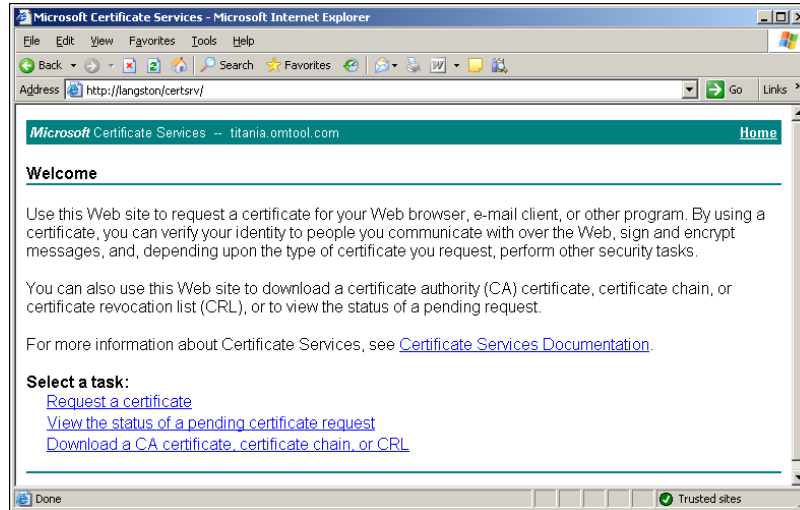
2 Click **REQUEST A CERTIFICATE**.
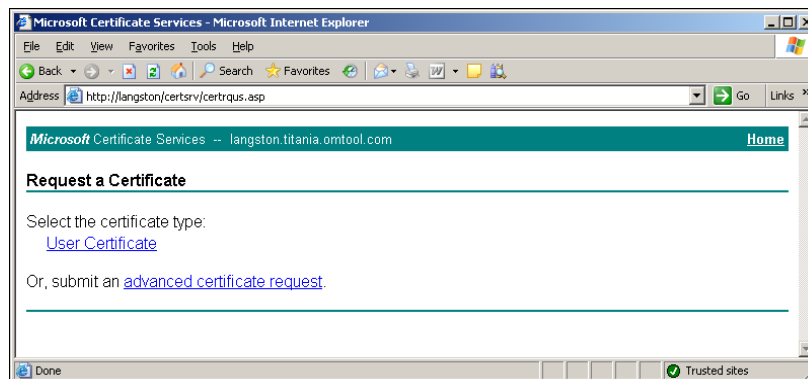
3 Click **ADVANCED CERTIFICATE REQUEST**.
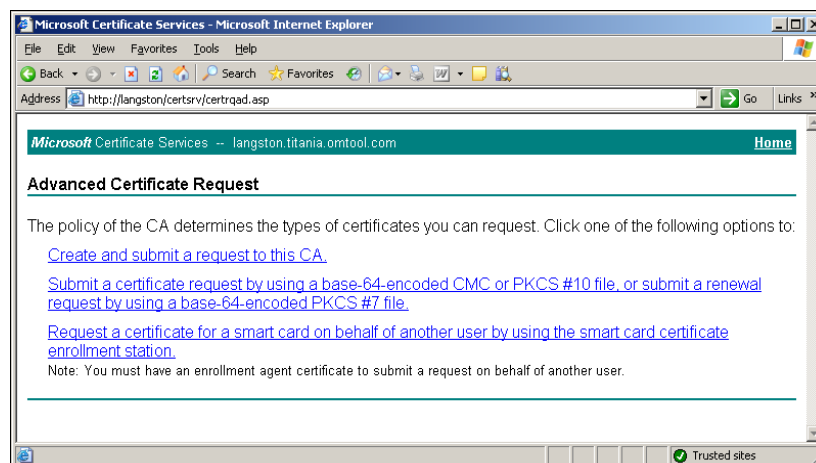
4 Click **SUBMIT A CERTIFICATE REQUEST BY USING A BASE 64-ENCODED CMC OR PKCS #10 FILE, OR SUBMIT A RENEWAL REQUEST BY USING A BASE 64-ENCODED PKCS #7 FILE**.
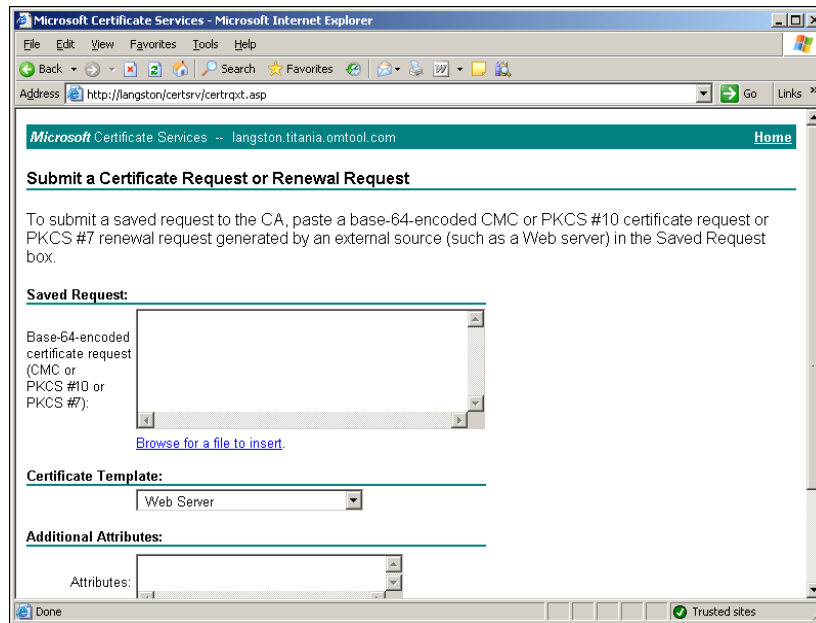
5   Complete the Certificate Request form using the instructions below:

   a   Click **BROWSE FOR A FILE TO INSERT** and select the file containing the certificate request.

   If Internet Explorer displays a warning that the security settings prevent the page from accessing the request file, go to the file, select and copy the content, and paste it into the **SAVED REQUEST** field.

   b   In the **Certificate Template** menu, select **WEB SERVER** from the drop down menu options.

   c   Click **SUBMIT**. The **Certificate Issued** page opens.
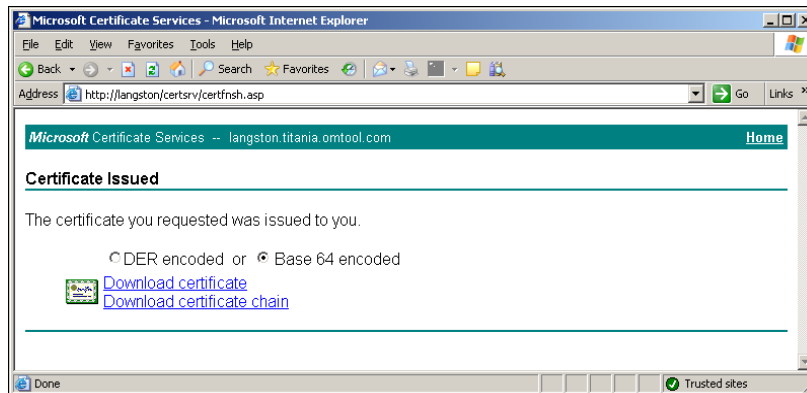
6   Select **BASE 64 ENCODED** and click **DOWNLOAD CERTIFICATE**. You are prompted to open or save the file.
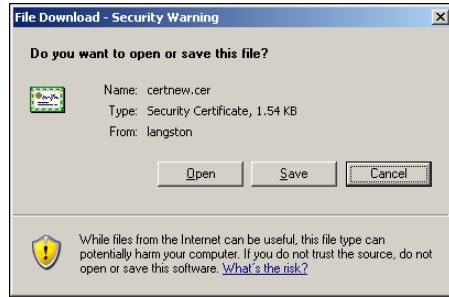
7 Click **SAVE**, and save the file to your computer.
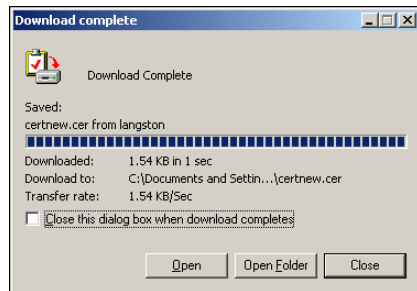
8 Click **CLOSE**.

9 Close the browser.

Installing the CA certificate on the Default Web Site

To install the CA certificate on the Default Web Site:

1 Start IIS and go to the Default Web Site in the console tree.
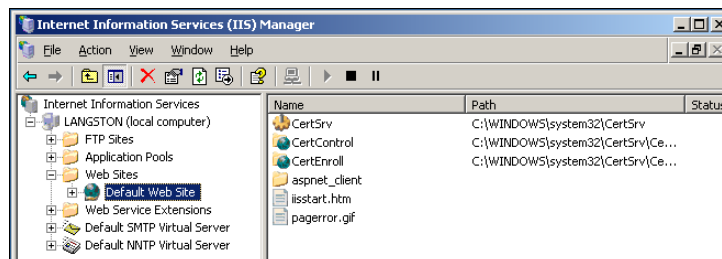
2 Right-click **DEFAULT WEB SITE** and select **PROPERTIES**.
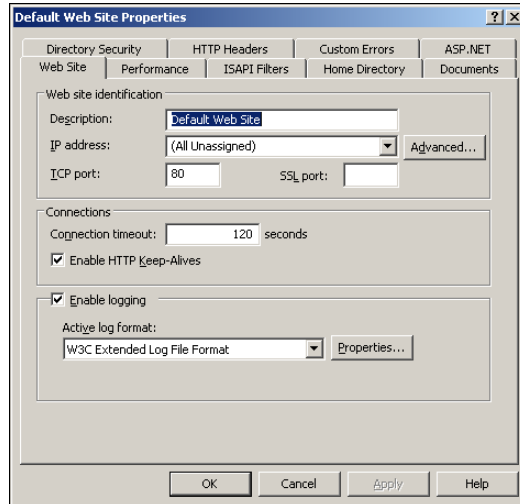
3   Go to the **DIRECTORY SECURITY** tab.
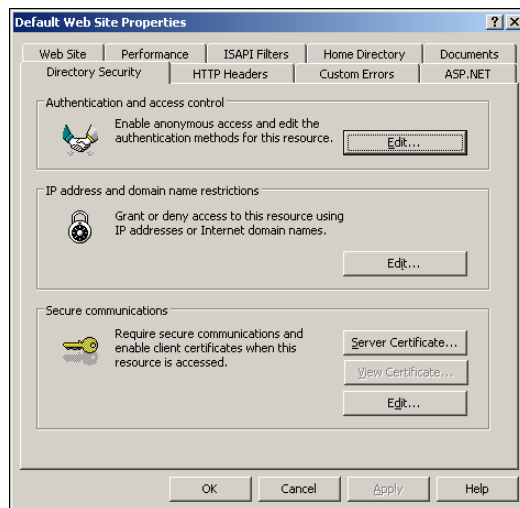
4   Go to **Secure communications** and click **SERVER CERTIFICATE**. The certificate wizard displays a welcome message.
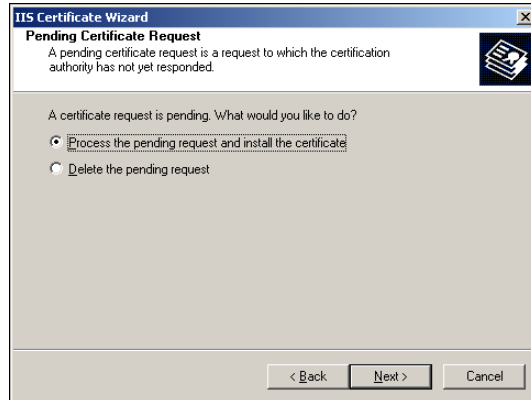
5   Click **NEXT**.

**6**   Verify that **PROCESS THE PENDING REQUEST AND INSTALL THE CERTIFICATE** is selected and click **NEXT**.
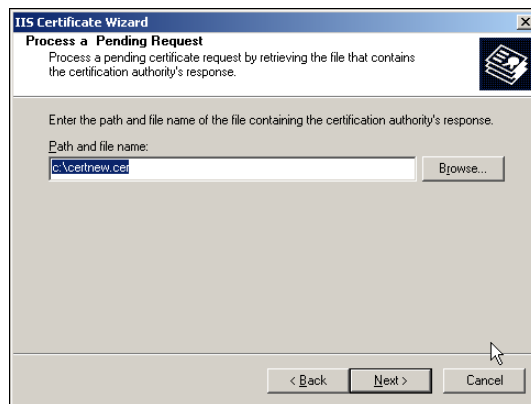
7   Verify that the field contains the path to the file containing the response to the certificate request and click **NEXT**.
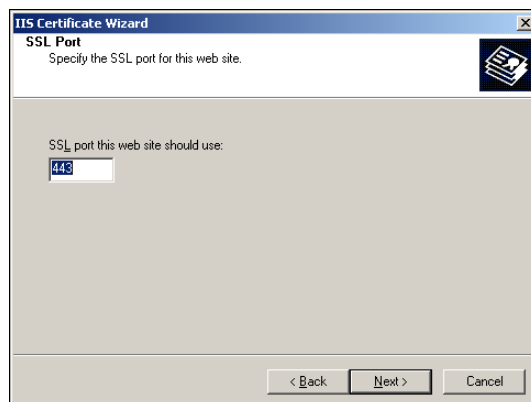
8   Accept the default value (unless a different SSL port is required), and click **NEXT**.
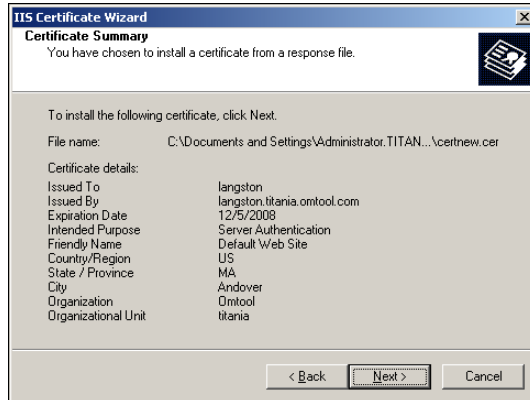
9   Review the details and click **NEXT**. The certificate wizard displays a message indicating that the certificate is installed.
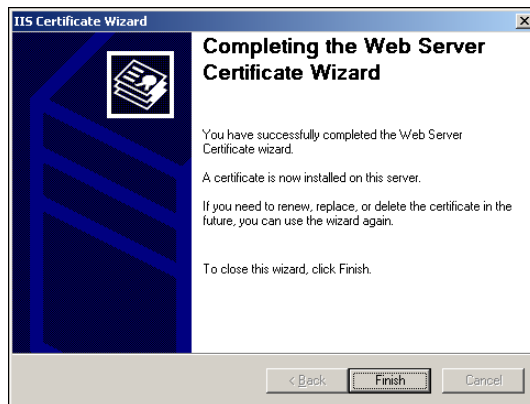
10   Click **FINISH**.

11   Click **OK** to close the **Default Web Site Properties** dialog box.
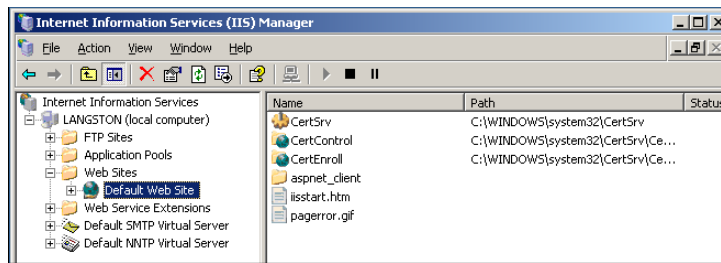
Enabling SSL on the Default Web Site

You must enable SSL (Secure Sockets Layer) on the Default Web Site so that messages and requests can be submitted securely to AccuRoute Intelligent Device Client.

To enable SSL on the Default Web Site:

1   Click **START > ADMINISTRATIVE TOOLS > INTERNET INFORMATION SERVICES (IIS) MANAGER**.
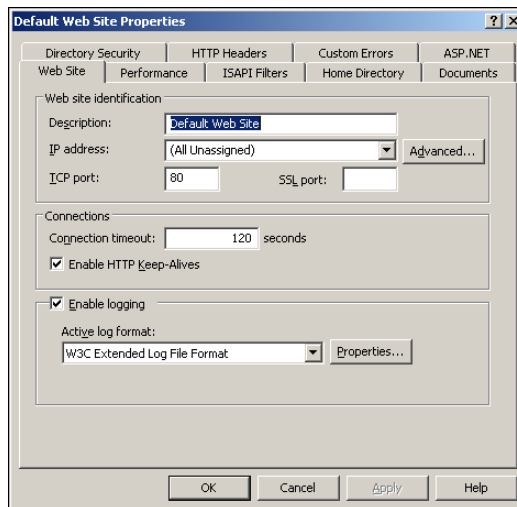
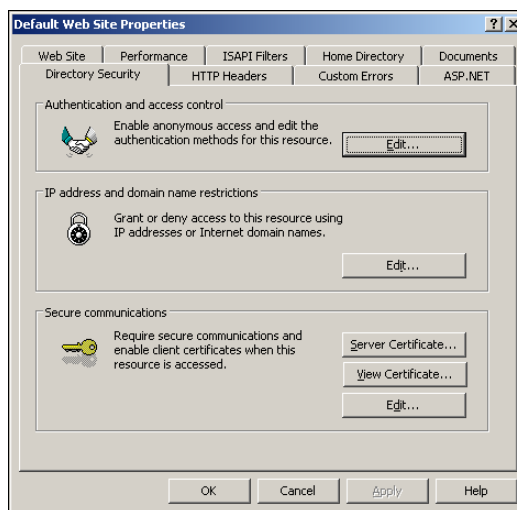**2**   In the console tree, go to Default Web Site.

3   Right-click **DEFAULT WEB SITE** and select **PROPERTIES**. The **Default Web Site Properties** page opens.
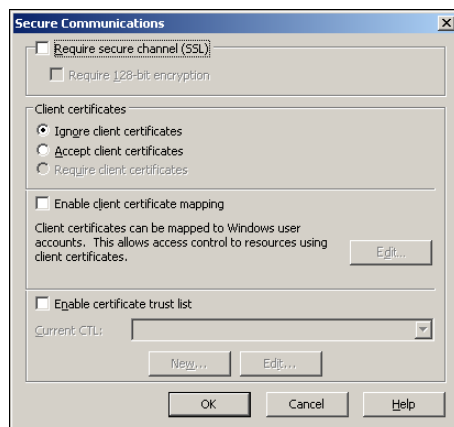
4

5   Click **DIRECTORY SECURITY**.

6   In the **Secure communications** section, click **EDIT**. The **Secure Communications** page opens.

7   Select **REQUIRE SECURE CHANNEL (SSL)** and **REQUIRE 128-BIT ENCRYPTION.**

8   Click **OK**.

9   Click **APPLY** to apply the changes to the Default Web Site.

10   Click **OK** again to close the Default Web Site Properties page.