



Connect Installation Guide



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- Interact in Upland Forums
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Access the Community by logging in with your company email at:

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- Phone: (978) 327 6800 or (1-888) 303 8098
- E-mail: omtool-support@uplandsoftware.com
- Community: <https://community.uplandsoftware.com/hc/en-us>

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Section I: Overview

The AccuRoute Connect Installation Guide contains instructions on installing and configuring the AccuRoute Connect application. It is written for System Administrators with detailed knowledge of the AccuRoute Server and Clients.

This section includes:

- [Introduction to AccuRoute Connect](#) (I-1)
- [How AccuRoute Connect works](#) (I-1)
- [Description of the AccuRoute Connect features](#) (I-2)
- [Deployment summary](#) (I-3)
- [Related AccuRoute v6.1 documentation](#) (I-4)

Introduction to AccuRoute Connect

AccuRoute Connect is an extensive and powerful application that allows AccuRoute to integrate with various external applications without any custom programming. It uses a powerful metadata gathering technique to collect metadata from the external application it integrates with. This captured metadata can be used, for example, to generate Embedded Directives and Routing Sheets. Using an Embedded Directive or a Routing Sheet, a user can route documents to repositories like MicroSoft® SharePoint® or ObjectArchive™ where the captured document is stored using the metadata values as indices.

The AccuRoute Connect Client is a separate licensed product that must be purchased before it can be installed or used. For more information on how AccuRoute Connect works and for custom integrations of AccuRoute with external applications, contact [Upland Sales](#).

How AccuRoute Connect works

The following example will give you an idea as to how AccuRoute Connect works. In this example, the Upland™ Administrator needs to integrate the AccuRoute environment with a Human Resource application. This application contains employee demographic information like employee name, date of birth, email and or fax number, social security number etc. The purpose of the integration is to collect the employee metadata and use the information to create a Routing Sheet, and then use the Routing Sheet to route documents to a repository using the metadata values as indices.

The integration is easily configured using AccuRoute Connect where the Administrator simply creates an “Appspace” for the application (with mappings for all the demographic information fields as Xmodel elements) and installs the Appspace on the AccuRoute Server.

Note An AppSpace can be thought of as a document container for RegWins. A RegWin is a set of tabs in the AppSpace that allow the Upland Server Administrator to associate controls on a Windows Application UI in order for the metadata to be captured.

Thereafter, whenever a user brings up the application, the user is presented an AccuRoute icon in the title bar. When the user activates the icon, AccuRoute Connect opens, presenting the user with one or several of the AccuRoute Connect options. (The list of options the user can see, will depend on his configuration).

- Create Routing Sheet
- Create Scan Reservation
- View Linked Documents
- Open in AccuRoute Desktop
- Upload Documents
- Link to Queue

As soon as the user selects the “Create Routing Sheet” option, a Routing Sheet is generated using the metadata from the current contents of the fields that are mapped as Xmodel elements.

Description of the AccuRoute Connect features

Create Routing Sheet

When the user selects the “Create Routing Sheet” option, a Routing Sheet is automatically generated using the metadata from the current contents of the fields that are mapped in the external application. The Routing Sheet can be used for capturing and routing of documents to the final destination using the values as indices. Since the Routing Sheet is automatically generated, this process does not require any data entry on the users part. Administrators however, can configure, to prompt the user for a relevant Routing Sheet name or users can use the default name if desired.

Create Scan Reservation

When the user selects the “Create Scan Reservation” option, an Embedded Directive is automatically generated using the current contents of the fields that are mapped for collecting metadata. Once you save this, the Embedded Directive can be made available on a multi-function device for use.

This method of creating a scan reservation does not require any data entry on the users part. Additionally, the users do not have to save or print a Routing Sheet before walking up to a multi-function device to scan their document.

This feature provides the same basic capabilities as “Create Routing Sheet” option. However instead of generating a routing sheet, the system creates an Embedded Directive and make it available on a multi-function device.

View Linked Documents

This feature allows the end user in an external application to search for and view all documents previously associated with a field mapped for metadata collection. It invokes the AccuRoute Web Client’s direct search capability where the mapped field is used as the search criteria for finding related documents.

For example, if the end user is in the external application selects the View linked Documents option, and if the employee id is mapped field, then the user will be able to view all documents that were archived via the AccuRoute Web Client that are associated with the employee ID.

Open the AccuRoute Desktop

In cases where more complicated or modified processing is required for document routing, the user will have the option to open the Routing Sheet in the AccuRoute Desktop Client.

When the user selects the “Open in AccuRoute Desktop” option in AccuRoute™ Connect, an Embedded Directive is created using the current contents of the fields that are mapped for metadata collection. The AccuRoute® Desktop Client application opens where the newly created Embedded Directive is listed. The user can save the Embedded Directive as is, or the user can modify the directive as needed before saving it.

The Embedded Directive can be accessed from the AccuRoute Desktop Client, the AccuRoute Web Client and also from multi function devices (MFPs). It is usually listed at the top of directives list available for use.

Upload Documents

When the user selects this option and if the documents being captured already exist electronically, the user has the option to upload the documents directly to the AccuRoute Server for processing, bypassing the scanning step.

Link to IIQ

The Link to Queue feature allows the user to apply the metadata from the external application to a job listed in the External Applications folder of the AccuRoute Queue application.

When the user selects the “Link to Queue” option in AccuRoute Connect, the Upland Workflow Integration Application page opens listing all jobs in the External Applications folder. The user can select a job, preview the associated document and click OK to apply the metadata from the external application to the job. The job moves from the External Applications folder of AccuRoute Queue application and matches the queue workflow rules to its final destination.

Deployment summary

To deploy AccuRoute Connect:

- 1 Verify that AccuRoute Server and the AccuRoute Connect Client requirements have been met. (Go to [Section 2: Requirements.](#))
- 2 Install AccuRoute Connect. (Go to [Section 3: Installation.](#))
- 3 Configure required configurations on the AccuRoute Server. (Go to [Section 4: Required AccuRoute Server Configurations.](#))
- 4 Configure additional configuration that may be required for AccuRoute Connect deployment. (Go to [Section 5: Optional Configurations.](#))

Related AccuRoute v6.1 documentation

For more information about AccuRoute v6.1 and other AccuRoute products, refer to the [AccuRoute v6.1 documentation home page](#) to access:

- Readmes and release notes
- DMS Libraries quick start guides
- User guides and online help
- Administrator guides
- Installation and upgrade guides

Section 2: Requirements

This section includes:

[AccuRoute Server requirements](#) (2-1)

[Client hardware and software requirements](#) (2-1)

AccuRoute Server requirements

The system where you will install the AccuRoute Server must meet the following minimum requirement:

- AccuRoute v6.1

Client hardware and software requirements

The systems where you will install AccuRoute Connect application must meet the following minimum requirements:

- Pentium®-class processor
- Windows 8, Windows 10, Windows 2016
- 20 GB hard disk space
- 2 GB RAM

Section 3: Installation

This section includes:

[Accessing the setup files](#) (3-1)

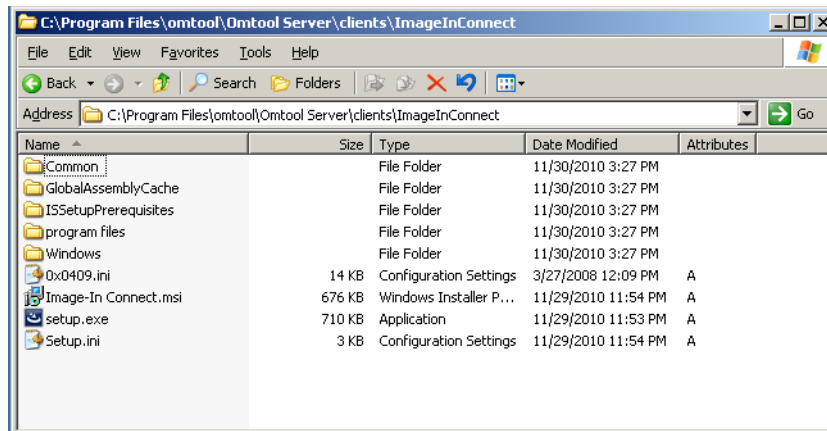
[Installing AccuRoute Connect](#) (3-1)

[Running the AccuRoute Connect setup in silent mode](#) (3-3)

[Uninstalling AccuRoute Connect](#) (3-4)

Accessing the setup files

The AccuRoute Connect setup files are located in the `[ServerInstallFolder]\clients\AccuRoute Connect` directory of the system running the AccuRoute Server. If you are installing AccuRoute Connect on the same system, simply navigate to this folder to access the setup files.



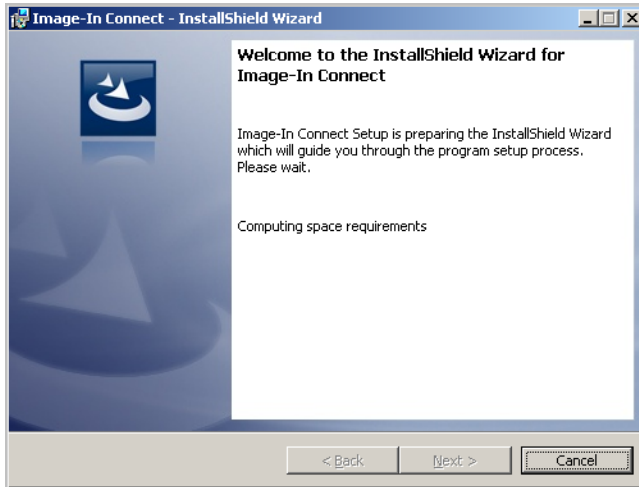
If you are installing AccuRoute Connect on a different system, ensure that proper access permissions have been set up for you to access the `[ServerInstallFolder]\clients\AccuRoute Connect` directory. You can also copy the setup files to a shared network directory.

Installing AccuRoute Connect

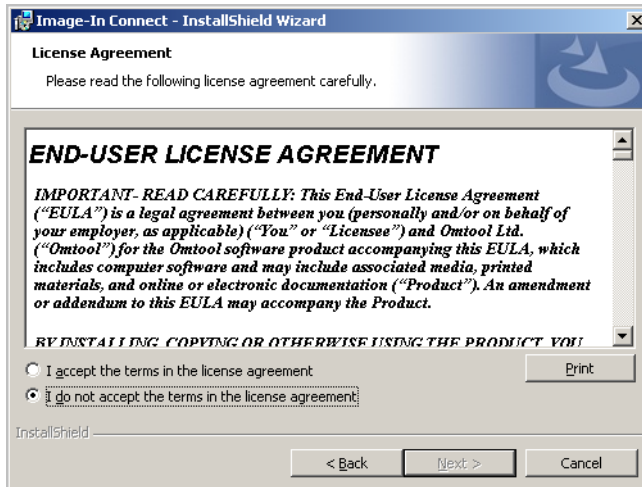
To install AccuRoute Connect:

- 1 Log in to the system where you are installing AccuRoute Connect using the Upland Service Account credentials.

- 2 Navigate to the directory containing the setup files:
[ServerInstallFolder]\clients\AccuRoute Connect.
- 3 Run `setup.exe`. The InstallShield Wizard configures your system and shows the **Welcome** message.

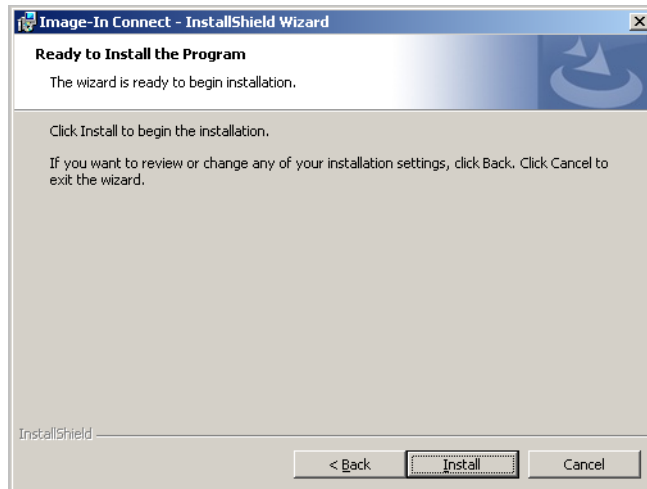


- 4 Click **Next**. The setup shows the **License Agreement** page.

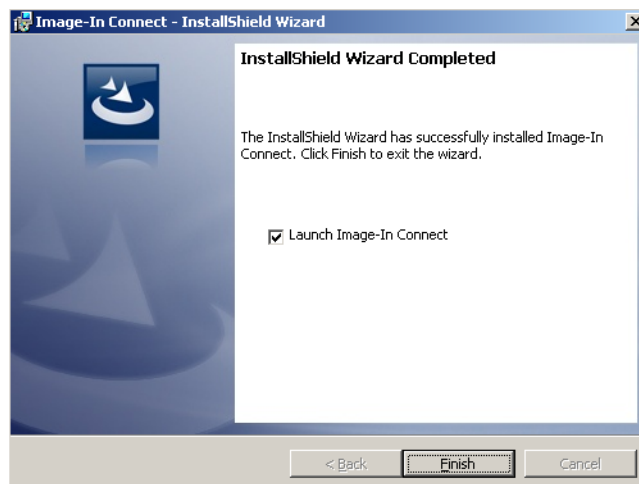


- 5 Read the license agreement and if you agree, select the **I accept the terms in the license agreement** option.

- 6 Click **Next**. The setup shows the **Ready to Install the Program** page.



- 7 Click **Next** to begin the installation. When installation is complete, the setup shows the **Installation Complete** page.



- 8 Clear the **Launch AccuRoute Connect** option if you do not want to open the application.
- 9 Click **Finish** to close the InstallShield Wizard.

Running the AccuRoute Connect setup in silent mode

To run the AccuRoute Connect setup in silent mode:

- 1 Log in to the system where you are installing AccuRoute Connect using the Upland Service Account credentials.
- 2 Open a command prompt.
- 3 Change the current directory to the one containing the setup files. The default location is `[ServerInstallFolder]\clients\AccuRoute Connect`.
- 4 Run: `setup.exe /s /v"/qn"`

This installs AccuRoute Connect to the default location:

```
[ServerInstallFolder]\clients\AccuRoute Connect.
```

- 5 Optionally, to change the location, set the property `INSTALLDIR`, run `setup.exe /s /v"/qn INSTALLDIR=<short name path>"` where `<short name path>` is the short name path to the target folder. (The entire path must be in short name format.)

Tip The command for short name conversions is `dir /x`. Run this command in any directory to return the short names of all folders in that directory. For example, to do a short name conversion on J:\Program Files, change the current directory to J:\ and run `dir /x`.

- 6 Verify that AccuRoute Connect is installed on the client by
 - a navigating to `[AccuRouteConnectInstallFolder]` directory on the client system.
 - b verifying that the AccuRoute Connect program files are installed.

Uninstalling AccuRoute Connect

To uninstall AccuRoute Connect:

- 1 Go to the **Control Panel** and start **Add or Remove Programs**.
- 2 Select **AccuRoute Connect** and click **Remove**.
You are prompted to confirm that you want to uninstall the software.
- 3 Click **Yes**.

The AccuRoute Connect application is uninstalled from your system. A progress indicator shows the status of the uninstallation.

Section 4: Required AccuRoute Server Configurations

This section contains instructions on how to configure the AccuRoute Server for AccuRoute Connect.

[Configuring Groups for AccuRoute Connect](#) (4-1)

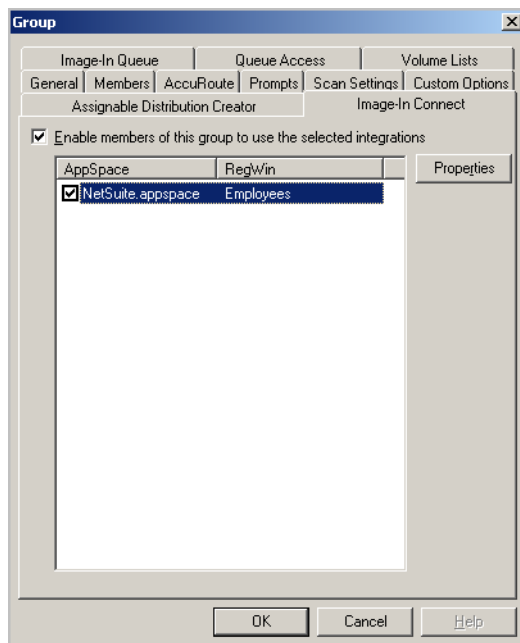
[Configuring the AccuRoute Connect node](#) (4-4)

Configuring Groups for AccuRoute Connect

After you have install AccuRoute Connect, you must specify the Groups that can use AccuRoute Connect.

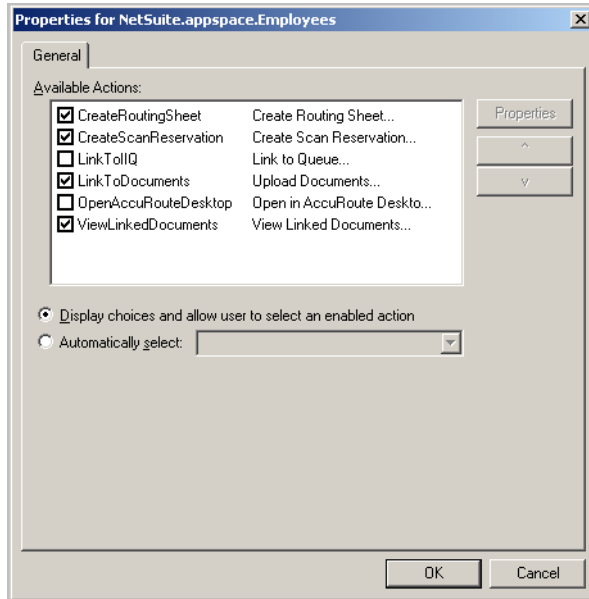
To configure Group permissions for AccuRoute Connect:

- 1 In the Upland Server Administrator console, expand **Configuration** and go to the **Groups** node.
- 2 Double click the **Group** you should configure for AccuRoute Connect. The **Properties** page opens.
- 3 Open the **AccuRoute Connect** tab.
- 4 Select the **Enable members of this group to use the selected integrations** option.
- 5 Select the **AppSpaces** the Group members can use.

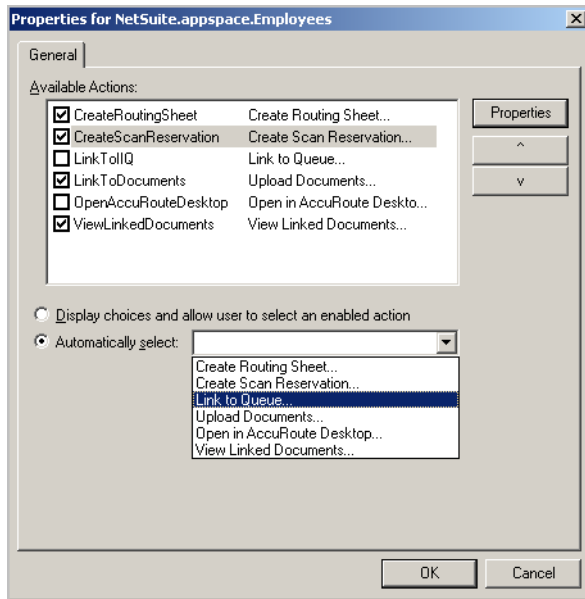


- 6 For each Appspace selected, click **Properties** to open the Properties page and configure as needed.

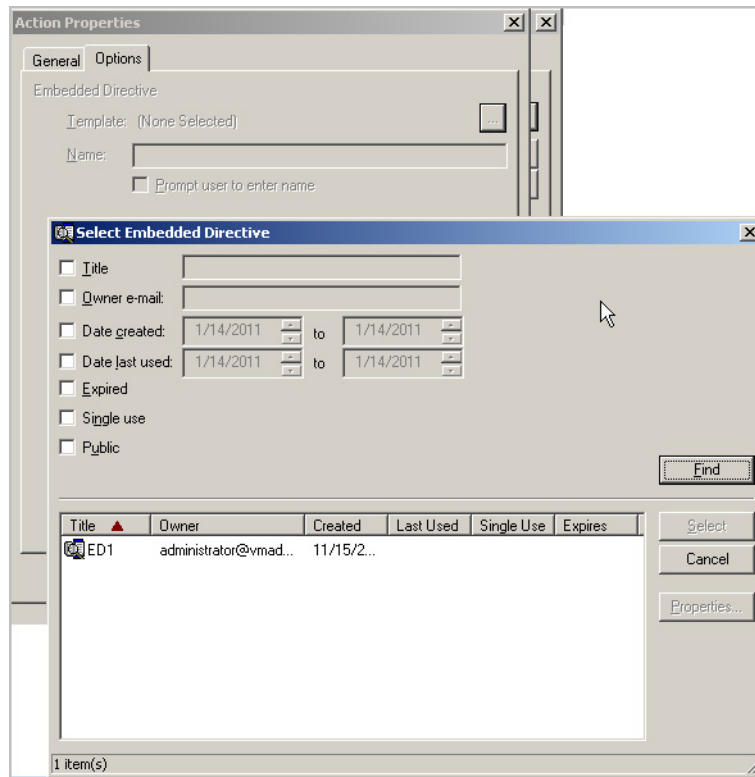
7 Select or clear the AccuRoute Connect options for the users as needed.



8 If you want the user to use only one of the AccuRoute Connect feature by default, select the Automatically select option and select the option for the user.



- 9 For each of the following features - Create a Routing Sheet feature, Create Scan Reservation, Open in AccuRoute Desktop and Upload Documents, and specify the template Embedded Directive optionally, enable prompt using the instructions below:
 - a Click **Properties** and in the **Action Properties** page that opens, go to the **Options** tab.
 - b Click on the **Browse** button beside the **and** field and select from available Embedded Directives on the server to serve as a template.



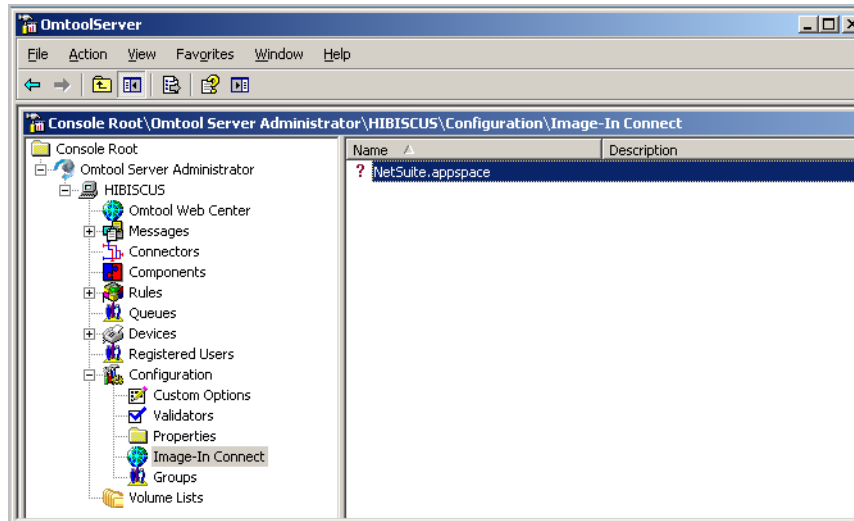
- c Optionally, in the **Name** text box, provide a descriptive name for the Embedded Directive. You can also ask the user to provide a name by checking the Prompt the user to enter name option.
 - d To enable use of Prompts, select the **Prompt user to enter name** option.
 - e Click **OK** to save your changes.
- 10 If you are configuring use of the Link to Queue feature, specify the Application Code using the following instructions.
 - a In the **Properties** page, select **LinkToIIQ** and then click **Properties** in that page. The **Action Properties** page opens.
 - b Open the **Actions** tab.
 - c In the **Application Code** text box, enter **IIC**.
 - d Click **OK** to save your changes.
- 11 Close all the other open dialogs to complete Group configuration.

Configuring the AccuRoute Connect node

After the Upland AccuRoute Server Administrator has set permissions for the Active Directory groups, the Administrator must configure the AccuRoute Connect node.

To go to the AccuRoute Connect node:

- 1 Open the Upland Server Administrator console.
- 2 Expand the **Configuration** node and find the **AccuRoute Connect** node.

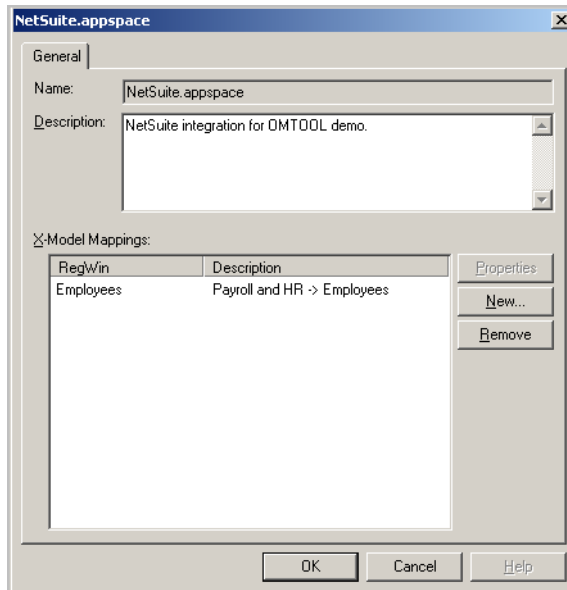


The AccuRoute Connect node lists all Appspaces defined for the AccuRoute environment. For each Appspace, the Administrator will define the Xmodel elements.

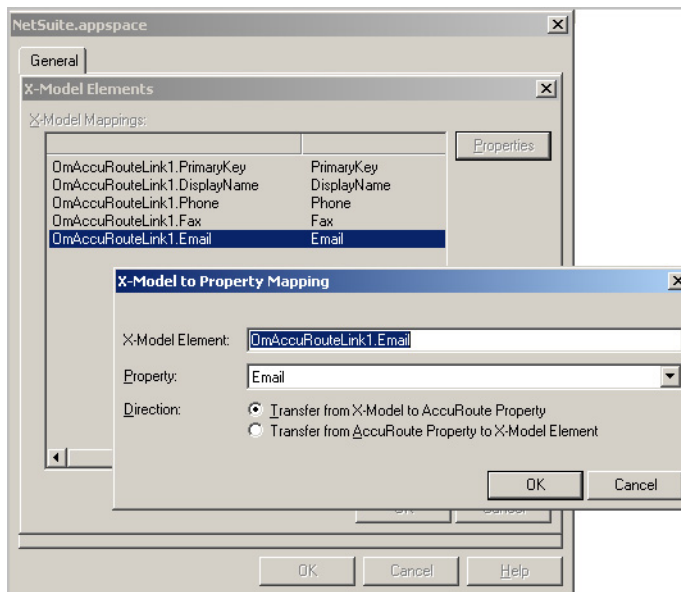
Note AppSpace can be thought of as a document container for RegWins. A RegWin is a set of tabs in the AppSpace that allow the Upland Server Administrator to associate controls on a Windows Application UI in order for the metadata to be captured.

The Appspace and the associated Xmodel definitions will depend on the external application AccuRoute is integrating with.

The following example shows an Appspace that has been defined for integration with a Human Resource application processing employee demographic information.



To collect employee demographic information like primary identification number, employee display name, email, phone and or fax number, the Upland Server Administrator will define Xmodel elements for each individual information piece as shown below.



Since the Upland action will populate properties from only one X-Model, when mapping properties to X-Model elements, it is important to create all the elements in one X-Model.

For example, the MyCRM.Appspace that is included with the install and is located in the Samples directory has several X-Models in each Regwin. This means that not all the fields are accessible through the Upland action.

To learn more about Appspaces and AccuRoute Connect, contact [Upland Sales](#).

Section 5: Optional Configurations

This section includes:

[Configuring Queue Workflow rule for Link to Queue feature](#) (5-1)

Configuring Queue Workflow rule for Link to Queue feature

The Link to Queue feature of AccuRoute Connect requires a Queue workflow rule for the External Applications folder for AccuRoute Queue is setup. Without this rule, jobs will not get routed to the External Applications folder, nor will it be listed in the Upland Workflow Integration Application page (this is the page that opens when a user selects Link to Queue option in AccuRoute Connect).

To configure the External Application Queue workflow rule:

- 1 In the Upland Server Administrator, go to the **Queues** node.
- 2 Select a Queue to configure. The **Properties** page opens.
- 3 Open the **Workflow** tab.
- 4 Click **Add** to open the **Queue Workflow Rules Properties** page.
- 5 In the **Description** text box, enter the name for the workflow, for example, ExternalApp.
- 6 In the **Criteria** section, click **Add**. The **Add Workflow Criteria** page opens.
- 7 Select **Property Dictionary Item** and click **Next**.
- 8 Select the property from the drop down list. Next select the **is valid** option and click **Finish**.
- 9 In the **Action** section, click **Configure**. The **Configure Action Workflow** page opens.
- 10 Select **External Application** and click **Next**.
- 11 In the **Application Code** text box, enter **IIC** and click **Finish**.
- 12 Click **OK** to close the **Queue Workflow Rules Properties** page.

Queue workflow configuration is complete.