

# **DMS Libraries for MyFolder**

# **Installation and Integration Guide**

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# Section I: Introduction

This guide contains instructions on deploying Omtool DMS Libraries v4.0 for MyFolder. It is written for systems administrators with detailed knowledge of the Omtool server and MyFolder.

This section includes:

Omtool DMS Libraries integration with MyFolder (1-1) Installation components (1-1) Deployment summary (1-1) Release notes (1-2) Related AccuRoute 4.0 documentation (1-3)

# **Omtool DMS Libraries integration with MyFolder**

Omtool DMS Libraries v4.0 includes the ability to integrate with MyFolder.

Using Omtool DMS Libraries v4.0, you can be sure all of your important documents are stored in MyFolder. The combined power of AccuRoute Desktop v4.0 and Omtool DMS Libraries v4.0 for MyFolder allows your users to send both soft copy and hard copy documents to MyFolder quickly and easily.

For more information on profiling documents to MyFolder, go to Section 8: Testing (8-1).

## Installation components

Omtool DMS Libraries v4.0 is included in the AccuRoute v4.0 installation.

Note The instructions in this guide are applicable only if you are running Omtool Libraries v4.0.

## Deployment summary

#### To deploy Omtool DMS Libraries v4.0 for MyFolder:

- I Complete the installation requirements. (Go to Installation on 3-1.)
- 2 Configure sharing and security permissions. (Go to Sharing and Security Permissions on 4-1.)

1-2

- 3 Complete required server configuration. (Go to <u>Required Server Configuration</u> on 5-1.)
- 4 Complete any optional server configuration. (Go to Optional Server Configuration on 6-1.)
- **5** Complete the client configuration. (Go to <u>Client Configuration</u> on 7-1.)
- 6 Test profiling a document into MyFolder. (Go to Testing on 8-1.)
- 7 Troubleshoot the installation. (Go to <u>Troubleshooting</u> on 9-1.)

### **Release notes**

### Enhancements

Omtool DMS Libraries v4.0 for MyFolder includes the following enhancements:

Omtool DMS Libraries v4.0 for MyFolder has been qualified with AccuRoute Desktop v4.0.

### Resolutions

Omtool DMS Libraries v4.0 for MyFolder includes the following resolved issues:

AccuRoute Desktop was not deleting temporary files called "stub documents" from some DMS applications. This issue impacted DMS applications that do not required AccuRoute Desktop to create a stub document before routing the document to the DMS application. See Knowledge Base Article K03805. (Go to <u>Omtool support and sales</u> on the inside front cover.) Ref. A7587

- Changing the label of a document type is now available. (See Knowledge Base article K02284.) (Go to Omtool support and sales on the inside front cover.) Ref. A4022
- My Folder now allows you to select your Home Folder (the user's home folder as defined in their Windows NT profile) on the MyFolder configuration wizard as the destination folder for files.
- The date\time stamp is no longer appended to the first scanned document going to MyFolder or MyFolder. (See Knowledge Base article K02510.) (Go to <u>Omtool support and sales</u> on the inside front cover.) Ref. A4620

### Limitations

Omtool DMS Libraries v4.0 for MyFolder includes the following limitations:

Ref. A7437

• The Profile dialog box "trails" when moved: When you select MyFolder as a recipient type, the Profile dialog box opens. If you reposition the Profile dialog box to another location on the window, a copy of the Profile dialog box is left behind. This happens every time you try to reposition the Profile dialog box. Closing the front instance of the Profile dialog box closes all copies. See Knowledge Base Article K04136. (Go to <u>Omtool support and sales</u> on the inside front cover.)

#### Ref. A9035

• **MyFolder can not use the Home folder as a destination**: When a home folder is configured for each user in Active Directory in Users and Computers, and MyFolder is configured with the "Home Folder" and "Connect using current user options", when a user tries to add a MyFolder destination in AccuRoute Desktop, the following error appears: "Failed to profile document". See Knowledge Base Article K04126. (Go to <u>Omtool support and sales</u> on the inside front cover.) Ref. A7437

## Related AccuRoute 4.0 documentation

For more information about AccuRoute Desktop and other AccuRoute products, refer to the <u>AccuRoute v4.0</u> <u>documentation home page</u> to access:

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

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Section 1: Introduction

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# Section 2: Requirements

This section includes:

Server requirements (2-1)

Client requirements (2-2)

### Server requirements

The system where you install the DMS connector for MyFolder must meet the following minimum requirements:

- □ AccuRoute v4.0
- DMS connector license
  - **Note** The DMS connector license must be added to the server prior to adding the connector. The AccuRoute server makes one connector available by default. Check the licensing properties on your server for connector availability.

For more information about license activation, continue to <u>Activating the server license</u> (2-1).

### Activating the server license

You can activate your license automatically or through a manual method, depending on whether the server has access to the internet.

#### **Automatic license activation**

Have available a copy of the Activation Code received with the software package.

- I Launch the Server Administrator and expand the tree view.
- 2 Select the server name. Right-click and select Licensing...
- 3 Click the Activate License... button.
- 4 Select the Automatically activate via the Internet option.
- 5 Paste the Activation Code in the Activation Code window.
- 6 Click OK. The server is updated with the new license.
- 7 Click **Close** to complete the procedure.

#### Manual license activation

Have available a copy of the Activation Code received with the software package.

- I Launch the Server Administrator and expand the tree view.
- 2 Select the server name. Right-click and select Licensing...
- 3 Click the Activate License... button.
- 4 Select the Export activation file for manual activation option.
- 5 Browse to a location to save the file.
- 6 From a system with internet access, launch the web browser and go to: https://license.omtool.com/ manual. The Manual License Portal page opens.
- 7 Paste the Activation Code in the Activation Code window.
- 8 Browse to the ManualActivation.exp file created in Step 5. Click Upload, then click NEXT.
- 9 Click **Download** and save the ManualActivation.imp file to a location available on the server.
- 10 From the Server Administrator, select the server name. Then, right-click and select Licensing...
- II Select the Activate License... button.
- 12 Select the Import activation file from manual activation option.
- 13 Browse to the saved ManualActivation.imp file.
- 14 Click OK. The license has been updated.
- 15 Click Close to complete the procedure.

# **Client requirements**

- AccuRoute Desktop v4.0
- □ FaxCenter v4.0

# Section 3: Installation

This section includes:

Pre-configuring MyFolder (3-1)

Adding the MyFolder connector (3-3)

Completing the MyFolder connector configuration wizard (3-5)

# Pre-configuring MyFolder

There are two options available when you configure MyFolder. You can select either the user's Home folder or you can specify a directory structure. If you select the user's Home folder, no pre-configuration is required for MyFolder. (Go to Adding the MyFolder connector on 3-3.) The user's home folder is configured in Active Directory. For more information, consult your Active Directory documentation.

If you are specifying a directory structure, you must create the MyFolder directory structure in the local area network before you can complete the configuration wizard for MyFolder. Continue to <u>Creating a directory structure</u> to support MyFolder.

### Creating a directory structure to support MyFolder

#### To create the MyFolder directory structure:

- I Create the top level folder and name it **MyFolder**. (If desired, you can choose a different name for this folder.)
- 2 If you are in a domain, identify the domains where Windows users route documents to MyFolder, and create a level 2 subfolder for each domain. The folder name must be the same as the domain name. For example, when the domain name is WindowsDomain, the folder must be called WindowsDomain.

-Or-

If you are in a workgroup, identify the workgroups where Windows users route documents to MyFolder, and create a level 2 subfolder for each workgroup computer. The folder name must be the same as the workgroup computer name. For example, when the computer name is **WorkgroupComputer**, the folder must be called **WorkgroupComputer**.

*Tip* You do not need to create individual folders for each Windows user. When a Windows user routes a document the first time, the level 3 folder is created automatically.

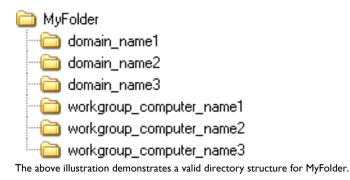
When you finish creating the directory structure, it might look similar to the following example:

#### Figure 3-A: Directory structure

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3-1





Continue to <u>Setting sharing permissions and security permissions</u>. Read about MyFolder security, and then configure permissions on MyFolder.

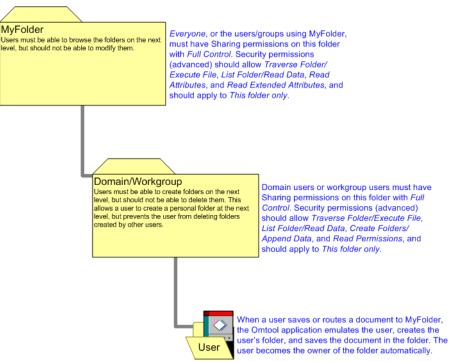
### Setting sharing permissions and security permissions

After you create the directory structure for MyFolder, configure the sharing and security permissions.

The minimum required sharing and security permissions allow users to do the following:

- All MyFolder users must be able to access all levels of the MyFolder structure.
- All MyFolder users must be able to create folders on the level below the domain or workgroup folder.
- All MyFolder users become the owner of their respective personal folders, but cannot access or modify the contents of other users' folders.
- The Windows account associated with the AccuRoute server must have access all levels of the MyFolder structure and security permissions with full control.
- If you are connecting via HTTP or HTTPS to an AccuRoute server in a different domain and the MyFolder directory is configured on the local system, you must specify the location of the MyFolder directory using the IP address. The Omtool server may have problems resolving the server name to an actual IP address due to DNS issues. Using the IP address eliminates the DNS issues.
- Set permissions for the c:\Program Files\Common Files\Omtool directory. The Domain Users group (or other appropriate user group) requires read/write permissions to this directory.

Figure 3-2: Minimum requirements for MyFolder



The above diagram illustrates the minimum requirements for MyFolder users.

For detailed instructions on configuring sharing and security permissions for MyFolder, go to <u>Section 4: Sharing and</u> <u>Security Permissions</u> (4-1). For more information on sharing and security permissions, consult Windows help.

Continue to Adding the MyFolder connector.

## Adding the MyFolder connector

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

3-4

#### To add the MyFolder connector to an AccuRoute server:

I Right-click Connectors in the console tree and select New AccuRoute Server connector for > MyFolder. The Server Address window appears.

Create New MyFold	er DMS Connector	×
Server Address Enter the nam connector is in	ne of the computer where the	
	Server Address: Run on the Message Server <u>Bemote Server</u>	
	< <u>B</u> ack. <u>N</u> ext > Cancel	

2 Select the server address to which you want this connector installed. Choose Run on the Message Server or Remote Server. If you selected Remote Server, enter the name of the server. Click Next. The Display Name window appears.

Create New MyFolder DMS Connector Display Name Enter a friendly name for the connector.	×
Na <u>m</u> e: [MyFolder on the Serve	2
	<pre></pre>

- 3 MyFolder on the Server appears as the default name. Type a friendly name for this connector in the Name text box and click Next. The Congratulations window appears.
- 4 Click Finish.

The **DMS configuration wizard** launches and prompts you to configure the connector to support MyFolder.

Continue to Completing the MyFolder connector configuration wizard.

## Completing the MyFolder connector configuration wizard

All Omtool applications on the same system share the Omtool DMS Libraries configuration (3-5)

Configuring a new MyFolder connector (3-5)

Configuring an existing MyFolder connector (3-6)

**FaxCenter supports only one DMS application**: FaxCenter can support only one DMS application, even though other Omtool applications such as the AccuRoute Desktop and Swiftwriter can support multiple DMS applications concurrently.

### All Omtool applications on the same system share the Omtool DMS Libraries configuration

When multiple Omtool applications are installed on the same system, these applications share the same DMS configuration data. If you make changes to the DMS configuration settings for one Omtool application, those changes affect all Omtool applications installed on the system.

### Configuring a new MyFolder connector

The **MyFolder Location** page appears immediately after you complete the new connector wizard.

#### To complete the configuration wizard for a new MyFolder connector:

- I On the **MyFolder Location** page, you can select the location in which to store your MyFolder documents.
  - Select Use user's Home Folder to select the user's home folder as defined in their Windows NT profile, or
  - select Use this location, click Browse, go to the MyFolder directory, select it, and click OK. For more information on the user's Home folder, see your Active Directory documentation.

MyFolder Location	×
DMS Configuration Enter configuration options.	
<ul> <li>Use user's Home Folder</li> <li>Use this location:</li> <li>Browse</li> <li>Example: \\server\share</li> </ul>	
< Back Next > Cancel	

Section 3: Installation

- **Note** If you are configuring the DMS connector on an AccuRoute server, leave this field blank. When routing documents on behalf of an AccuRoute Desktop user, the server uses the DMS configuration data from the workstation where the user generated the Routing Sheet.
- 2 Click Next. The MyFolder Connection Credentials page appears.

MyFolder Connection Credentials	×
DMS Configuration Enter configuration options.	
Connect using current user	
C Connect using this user:	
User name:	
Password:	
Confirm password:	
	< Back Finish Cancel

**3** Select an authentication method:

**Connect using current user** - Select this option to connect to the MyFolder directory using the login credentials of the current Windows user. (This setting is recommended for single-user workstations.)

**Connect using this user** - Select this option to connect to the MyFolder directory using specific login credentials, and type the user name and password in the **User name**, **Password**, and **Confirm password** text boxes.

If you are configuring the DMS connector on the AccuRoute server, Omtool strongly recommends that you select **Connect using this user** and provide the login credentials of the Windows user account associated with the AccuRoute server. In rare circumstances when the AccuRoute server cannot obtain the Windows login credentials of the AccuRoute Desktop user, the server uses these login credentials. This reduces the possibility of an authentication failure.

4 Click Finish.

### Configuring an existing MyFolder connector

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

#### To complete the configuration wizard for an existing MyFolder connector:

- I Click **Connectors** in the console tree, and double-click the **MyFolder** connector in the details pane.
- 2 Click the Advanced tab.
- 3 Locate the DMS Configuration section, and click Configure. The MyFolder Location page appears.
- 4 Perform steps one through four in <u>Configuring a new MyFolder connector</u> (3-5)

# Section 4: Sharing and Security Permissions

This section includes:

Introduction (4-1) Requirements (4-1) Security considerations (4-1) Setting permissions for MyFolder users (4-2) Setting the required permissions for the Omtool server Windows account (4-17)

## Introduction

This section contains detailed instructions on setting sharing and security permissions for MyFolder.

In order to complete the procedures in this section, you should be familiar with Windows sharing and security permissions. For additional information on Windows permissions, consult Windows help.

The procedures described in this section apply to Windows 2003/2000 servers.

## Requirements

Before you proceed, verify that you have created the required folders for MyFolder. As a minimum, you must have a top-level folder, called MyFolder or some other name, and a second-level folder for each domain or workgroup to which MyFolder users belong.

## Security considerations

This section outlines the minimum required permissions for MyFolder users. By implementing these permissions, you enable MyFolder users to access and modify the contents of their personal folders only. Users cannot modify the contents of another user's folder. You can allow additional permissions as necessary.

4-2

### Setting permissions for MyFolder users

#### **Top-level folder (MyFolder)**

Using the following procedure, set the sharing and security permissions for MyFolder users on the top-level folder in the structure. This folder can be called MyFolder or another name.

This procedure instructs you to give Everyone sharing permissions with Full Control and special read security permissions that apply only to this folder. Omtool recommends that you use Everyone as documented in the following procedure. However, as an alternative to Everyone, you can add only the users or groups that use MyFolder.

#### To set the sharing and security permissions on the top-level folder:

- I Go to the top-level folder using Windows Explorer. Right-click the folder and select Properties.
- 2 Click the **Sharing** tab.

MyFolder Propert	ies <mark>?</mark> ×
General Sharing	Security Web Sharing Customize
	an share this folder with other users on your k. To enable sharing for this folder, click Share this
Do not sha	are this folder
C Share this	folder
S <u>h</u> are name:	
Comment:	
User limit:	C Maximum allowed
	O Allow this number of users:
	ions for users who access this network, click Permissions.
To configure s Caching.	ettings for offline access, click Caching
	OK Cancel Apply

3 Select Share this folder and click Permissions.

Permissions for MyFolder		<u>? ×</u>
Share Permissions		
Group or user names:		
	A <u>d</u> d	<u>R</u> emove
Permissions for Everyone	Allow	Deny
Full Control		
Full Control Change		
Full Control		
Full Control Change		

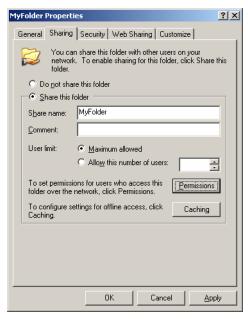
4 Select Everyone in the Group or user names section, go to the Permissions for Everyone section, and select the Allow check box associated with the Full Control option.

\_

Permissions for MyFolder		? ×
Share Permissions		,
Group or user names:		
🕵 Everyone		
	A <u>d</u> d	<u>R</u> emove
Descriptions (or Description		- 1
Permissions for Everyone	Allow	Deny
Full Control		
Full Control Change	V V	
Full Control		
Full Control Change	V V	

Section 4: Sharing and Security Permissions

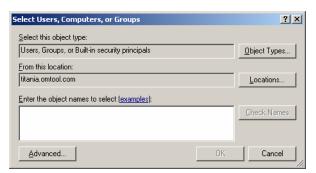
5 Click Apply and click OK.



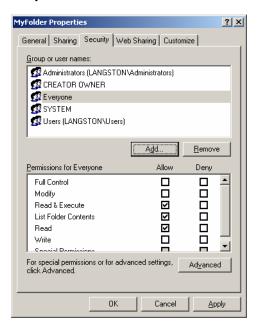
6 Click the **Security** tab.

MyFolder Propertie	25					? ×
General Sharing	Security	Web	Sharing	Custor	mize	
<u>G</u> roup or user nar	nes:					
<b>M</b> Administrato	rs (LANGS	τονν	Administra	ators)		
CREATOR (	JWNER					
SYSTEM						
🕵 Users (LANG	3STON\Us	sers)				
1				1		
			A <u>d</u> d.		<u>R</u> emov	'e
Permissions for Ac	Iministrator	s	A	Allow	Deny	
Full Control				>		
Modify				$\checkmark$		
Read & Execut	-			4		
List Folder Con	tents			5		
Read				>		
Write Special Permiss				$\checkmark$	님	-
For special permis click Advanced.		r adva	nced setti	ings,	Ad <u>v</u> ance	ed
	0	)K	C	ancel		oply

7 Click Add.



8 Go to the Group or user names section, enter Everyone, click Check Names, verify that Everyone resolved, and click OK.



F

9 Select Everyone in the Group or user names section, go to the Permissions for Everyone section, and click Advanced.

Adv	dvanced Security Settings for MyFolder					<u> </u>
P	Permissions Auditing Owner Effective Permissions					
	To view more information about special permissions, select a permission entry, and then click Edit,					
	10 1101111			x a pointionor or ay,	and their eller Eak.	
	Permission	n entries:				
	Туре	Name	Permission	Inherited From	Apply To	
	Allow	Administrators (LANG	Full Control	<not inherited=""></not>	This folder only	
	Allow	Everyone	Read & Execute	<not inherited=""></not>	This folder, subfolders	
	Allow	Administrators (LANG	Full Control	Parent Object	This folder, subfolders	
	Allow	CREATOR OWNER	Full Control	Parent Object	Subfolders and files only	
	Allow	SYSTEM	Full Control	Parent Object	This folder, subfolders	
	Allow	Users (LANGSTON\	Special	Parent Object	This folder and subfol	
	Allow	Users (LANGSTON\	Read & Execute	Parent Object	This folder, subfolders	
	Ad	d Edit	Remove	1		
	AQ	a <u>E</u> ak	<u>h</u> emove			
		inheritable permissions from	the parent to propar	ate to this object ar	d all child objects. Include	
		with entries explicitly define		gate to this object ai	ia all'enlita objects, metade	
	🗌 Regla	ce permission entries on all	child objects with en	tries shown here tha	it apply to child objects	
	Learn more about access control.					
_						
				OK	Cancel Apply	
						_

10 Select Everyone in the Permissions entries list and click Edit.

ermission Entry for MyFolder		? >
Object		
Name: Everyone		<u>C</u> hange
Apply onto: This folder, subfolders and	d files	<b>•</b>
Permissions:	Allow	Deny
Full Control Traverse Folder / Execute File List Folder / Read Data Read Attributes Read Extended Attributes Create Files / Write Data Create Folders / Append Data Write Attributes Write Extended Attributes Delete Subfolders and Files Delete Read Permissions		
[	OK	Cancel

- Permission Entry for MyFolder ? × Object Name: Everyone Change. Apply onto: This folder only -Allow Permissions: Deny ٠ Full Control Traverse Folder / Execute File  $\checkmark$ 2 2 List Folder / Read Data Read Attributes Read Extended Attributes 00000000 Create Files / Write Data Create Folders / Append Data Write Attributes Write Extended Attributes Delete Subfolders and Files Delete Read Permissions -C Apply these permissions to objects and/or containers within this container only Clear All ΟK Cancel
- II Go to the Apply onto drop-down menu and select This folder only.

12 Go to the Permissions section and select the Allow check box associated with the Traverse Folder/Execute File, List Folder/Read Data, Read Attributes, and Read Extended Attributes options. (The permissions listed in this step are required. You can allow or deny other permissions needed.)

Permission Entry for MyFolder		? ×
Object		
Name: Everyone		<u>C</u> hange
Apply onto: This folder only		•
Permissions:	Allow	Deny
Full Control Traverse Folder / Execute File List Folder / Read Data Read Attributes Read Extended Attributes Create Files / Write Data Create Folders / Append Data Write Attributes Write Extended Attributes Delete Subfolders and Files Delete Read Permissions Character Provider States Containers within this container only		
	OK	Cancel

4-8

13 Click OK to close the Permission Entry for MyFolder dialog box.

٩dva	dvanced Security Settings for MyFolder				? X	
Per	Permissions Auditing Owner Effective Permissions					
		1				1
Т	o view m	nore information about spec	ial permissions, selec	t a permission entry,	and then click Edit.	
P	ermissior	n entries:				
	Туре	Name	Permission	Inherited From	Apply To	
	Allow	Administrators (LANG	Full Control	<not inherited=""></not>	This folder only	
	Allow	Everyone	Special	<not inherited=""></not>	This folder only	
	Allow	Administrators (LANG	Full Control	Parent Object	This folder, subfolders	S
	Allow	CREATOR OWNER	Full Control	Parent Object	Subfolders and files o	nly
	Allow	SYSTEM	Full Control	Parent Object	This folder, subfolders	S
	Allow	Users (LANGSTON\	Special	Parent Object	This folder and subfol	
	Allow	Users (LANGSTON\	Read & Execute	Parent Object	This folder, subfolders	š
				- 1		
	Ad	d <u>E</u> dit	<u>R</u> emove			
-						
R	Allow i	inheritable permissions from	the parent to propag	jate to this object an	d all child objects. Includ	le 📗
	these	with entries explicitly define	d here.			
			1.			
1	Regla	ce permission entries on all	child objects with en	tries shown here tha	t apply to child objects	
L	Learn more about access control.					
				1		
				OK	Cancel <u>A</u> p	ply

14 Click Apply and click OK to close the Advanced Security Settings for MyFolder dialog box.

MyFolder Properties			<u>?</u> ×
General Sharing Sec	urity Web	Sharing Custor	nize
<u>G</u> roup or user names:			
🕵 Administrators (LA		Administrators)	
CREATOR OWN	ER		
🔐 Everyone			
SYSTEM			
🕵 Users (LANGSTO	N/Users)		
I			
		A <u>d</u> d	<u>R</u> emove
Permissions for Everyor	ne	Allow	Deny
Full Control			
Modify			
Read & Execute			
List Folder Contents			
Read			
Write Special Permissions			
		in a state state of the state o	
For special permissions click Advanced.	or for advar	icea secongs,	Advanced
		1	
	OK	Cancel	

15 Click Apply and click OK to close the MyFolder Properties dialog box.

#### Second-level folder (domain or workgroup name)

Using the following procedure, set the sharing and security permissions for MyFolder users on the second-level folder in the structure. This folder should be named after the domain or workgroup to which MyFolder users belong.

This procedure instructs you to give domain users or workgroup users sharing permissions with Full Control and special read/write security permissions that apply to this folder only. Omtool recommends that you include all domain users or workgroup users as documented in the following procedure. As an alternative to this method, however, you can add only the users or groups that use MyFolder.

**Note** Note: The image captures in the following procedure illustrate the sharing and security permissions for users in the domain TITANIA.

#### To set the sharing and security permissions on the second-level folder:

- I Go to second-level folder using Windows Explorer. Right-click the folder and select **Properties**.
- 2 Click the Sharing tab.

TITANIA Properti	25 <u>? X</u>
General Sharing	Security Web Sharing Customize
	n share this folder with other users on your <. To enable sharing for this folder, click Share this
O not sha	re this folder
C Share this	folder
S <u>h</u> are name:	
Comment:	
User limit:	<u>M</u> aximum allowed
	C Allow this number of users:
	ons for users who access this <u>Permissions</u>
To configure s Caching.	ettings for offline access, click Caching
	OK Cancel Apply

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Section 4: Sharing and Security Permissions

3

Permissions for TITANIA ? × Share Permissions Group or user names: Everyone A<u>d</u>d... <u>R</u>emove Permissions for Everyone Allow Deny Full Control Change  $\square$ Read ΟK Cancel

Select the Share this folder option and click Permissions.

4 Click Add.

Select Users, Computers, or Groups	<u>? ×</u>
Select this object type:	
Users, Groups, or Built-in security principals	Object Types
Erom this location:	
titania. omtool. com	Locations
Enter the object names to select ( <u>examples</u> ):	
	<u>C</u> heck Names
Advanced OK	Cancel

5 Go to the Group or user names section, enter domain users (for a domain) or workgroup users (for a workgroup), click Check Names, verify that the account name is resolved, and click OK.

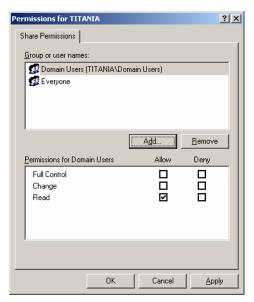
Permissions for TITANIA		? ×
Share Permissions		
Group or user names:		
Domain Users (TITANIA\D     D     Everyone	omain Users)	
	<u>Add</u>	<u>R</u> emove
Permissions for Domain Users	Allow	Deny
Full Control Change		
Read		
OK	Cancel	Apply

6 Select the domain users group or workgroup users group in the **Group or user names** section, go to the **Permissions for <group>** section, and select the **Allow** check box associated with the **Full Control** option.

Permissions for TITANIA		?)	×
Share Permissions			
Group or user names:			
Domain Users (TITANIA\Do	main Users)		L
🕵 Everyone			
	A <u>d</u> d	<u>R</u> emove	l
Permissions for Domain Users	Allow	Deny	L
Full Control			L
Change			L
Read			L
			L
			L
			L
OK	Cancel	Apply	

Section 4: Sharing and Security Permissions

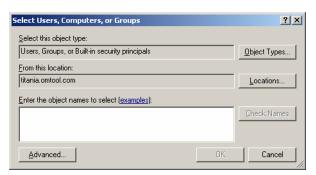
7 Click **Apply** and click **OK**.



8 Click the **Security** tab.

TITANIA Properties			? ×
General Sharing Secu	rity Web	Sharing Custo	mize
Group or user names:			
Administrators (LAN	GSTONV4	Administrators)	
CREATOR OWNE	R		
🕵 SYSTEM			
🕵 Users (LANGSTON	VUsers)		
		A <u>d</u> d	<u>R</u> emove
Permissions for Administ	ators	Allow	Deny
Full Control		$\checkmark$	
Modify		$\checkmark$	
Read & Execute		$\checkmark$	
List Folder Contents		>	
Read		>	
Write		$\checkmark$	
<ul> <li>For special permissions of click Advanced.</li> </ul>	n for advar	icea settings,	Advanced
		1	
	OK	Cancel	Apply

9 Click Add.



10 Go to the Group or user names section, enter domain users (for a domain) or workgroup users (for a workgroup), click Check Names, verify that the account name is resolved, and click OK.

TITANIA Properties		? ×
General Sharing Security W	/eb Sharing Custor	mize
Group or user names:		
🕵 Administrators (LANGSTO	N\Administrators)	<u> </u>
🕵 CREATOR OWNER		
🗾 👧 Domain Users (TITANIA\[	Domain Users)	
🕵 E veryone		
SYSTEM		
	(A <u>d</u> d)	Remove
Permissions for Domain Users	Allow	Deny
Full Control		
Modify		
Read & Execute		
List Folder Contents		
Read		
Write Special Permissions		- 맘 ㅋ
For special permissions or for ac	tvanced settings	
click Advanced.		Advanced
OK	Cancel	Apply

II Select the domain users group or workgroup users group in the **Group or user names** section, go to the **Permissions for <group>** section, and click **Advanced**.

Permissions       Auditing       Owner       Effective Permissions         To view more information about special permissions, select a permission entry, and then click Edit.         Permission entries:         Type       Name       Permission       Inherited From       Apply To         Allow       Domain Users (TITA       Read & Execute <not inherited="">       This folder nly         Allow       Everyone       Special       <not inherited="">       This folder only         Allow       CREATOR OWNER       Full Control       Parent Object       This folder subfolders         Allow       SYSTEM       Full Control       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Special       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Special       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Read &amp; Execute       Parent Object       This folder, subfolders         Allow inheritable permissions from the parent to propagate to this object and all child objects. Include these with entries explicitly defined here.       Reglace permission entries on all child objects with entries shown here that apply to child objects         Learn more about access control.       Allow       Access control.</not></not>	Ad	vanced S	ecurity Settings for TI	TANIA		?	×
Permission entries:       Type       Name       Permission       Inherited From       Apply To         Allow       Domain Users (TITA       Read & Execute <not inherited="">       This folder, subfolders         Allow       Everyone       Special       <not inherited="">       This folder, subfolders         Allow       Administrators (LANG       Full Control       Parent Object       This folder, subfolders         Allow       CREATOR OWNER       Full Control       Parent Object       This folder, subfolders         Allow       SYSTEM       Full Control       Parent Object       This folder, subfolders         Allow       Users (LANGSTON)       Special       Parent Object       This folder, subfolders         Allow       Users (LANGSTON)       Read &amp; Execute       Parent Object       This folder, subfolders         Allow       Users (LANGSTON)       Read &amp; Execute       Parent Object       This folder, subfolders         Add       Edit       Remove      </not></not>	F	Permissions Auditing Owner Effective Permissions					
Permission entries:       Type       Name       Permission       Inherited From       Apply To         Allow       Domain Users (TITA       Read & Execute <not inherited="">       This folder, subfolders         Allow       Everyone       Special       <not inherited="">       This folder, subfolders         Allow       Administrators (LANG       Full Control       Parent Object       This folder, subfolders         Allow       CREATOR OWNER       Full Control       Parent Object       This folder, subfolders         Allow       SYSTEM       Full Control       Parent Object       This folder, subfolders         Allow       Users (LANGSTON)       Special       Parent Object       This folder, subfolders         Allow       Users (LANGSTON)       Read &amp; Execute       Parent Object       This folder, subfolders         Allow       Users (LANGSTON)       Read &amp; Execute       Parent Object       This folder, subfolders         Add       Edit       Remove      </not></not>		To view r	nore information about sper	cial nermissions, selec	a nermission entru	and then click Edit	
Type       Name       Permission       Inherited From       Apply To         Allow       Domain Users (TITA       Read & Execute <not inherited="">       This folder only         Allow       Everyone       Special       <not inherited="">       This folder only         Allow       CREATOR DWNER       Full Control       Parent Dbject       This folder, subfolders         Allow       CREATOR DWNER       Full Control       Parent Dbject       This folder, subfolders         Allow       SYSTEM       Full Control       Parent Dbject       This folder, subfolders         Allow       Users [LANGSTON\       Special       Parent Dbject       This folder, subfolders         Allow       Users [LANGSTON\       Special       Parent Dbject       This folder, subfolders         Allow       Users [LANGSTON\       Read &amp; Execute       Parent Dbject       This folder, subfolders         Allow       Users [LANGSTON\       Read &amp; Execute       Parent Dbject       This folder, subfolders         Allow       Users [LANGSTON\       Read &amp; Execute       Parent Dbject       This folder, subfolders         Allow       Users [LANGSTON\       Read &amp; Execute       Parent Dbject       This folder, subfolders         Allow</not></not>		10 110111			st a pointionon on ag	, and then eller clark	
Allow       Domain Users (TITA       Read & Execute       < not inherited>       This folder null folder only         Allow       Everyone       Special       < not inherited>       This folder only         Allow       CREATOR DW/NER       Full Control       Parent Object       Subfolders         Allow       CREATOR DW/NER       Full Control       Parent Object       Subfolders and files only         Allow       SYSTEM       Full Control       Parent Object       This folder, subfolders         Allow       Users (LANGSTON)       Special       Parent Object       This folder, subfolders         Allow       Users (LANGSTON)       Special       Parent Object       This folder, subfolders         Allow       Users (LANGSTON)       Read & Execute       Parent Object       This folder, subfolders         Allow       Users (LANGSTON)       Read & Execute       Parent Object       This folder, subfolders         Allow       Users (LANGSTON)       Read & Execute       Parent Object       This folder, subfolders         Allow       Users (LANGSTON)       Read & Execute       Parent Object       This folder, subfolders         Allow       Init objects       Read & Execute       Parent Object       This folder         <		Permissio	n entries:				
Allow       Everyone       Special <not inherited="">       This folder only         Allow       Administrators (LANG       Full Control       Parent Object       This folder, subfolders         Allow       CREATOR DWNER       Full Control       Parent Object       This folder, subfolders         Allow       SYSTEM       Full Control       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Special       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Read &amp; Execute       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Read &amp; Execute       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Read &amp; Execute       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Read &amp; Execute       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Read &amp; Execute       Parent Object       This folder, subfolders         Add       Edit       Bemove       This folder only       This folder, subfolders         Reglace permission entries on all child objects with entries shown here that apply to child objects       Learn more about <u>access control.</u></not>		Туре	Name	Permission	Inherited From	Apply To	
Allow       Administrators (LANG       Full Control       Parent Object       This folder, subfolders         Allow       CREATOR 0WNER       Full Control       Parent Object       This folder, subfolders         Allow       SYSTEM       Full Control       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Special       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Special       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Read & Execute       Parent Object       This folder, subfolders         Allow       Users (LANGSTON\       Read & Execute       Parent Object       This folder, subfolders         Add       Edit       Remove       This folder and subfolder       This folder and subfolders         Add       Edit       Remove       Marcove       This folder and subfolders         Allow inheritable permissions from the parent to propagate to this object and all child objects. Include these with entries explicitly defined here.       Reglace permission entries on all child objects with entries shown here that apply to child objects         Learn more about access control.       Learn more about access control.       Reglace permission entries on all child objects		Allow	Domain Users (TITA	Read & Execute	<not inherited=""></not>	This folder, subfolders	
Allow       CREATOR OWNER       Full Control       Parent Object       Subfolders and files only         Allow       SYSTEM       Full Control       Parent Object       This folder subfolders         Allow       Users (LANGSTON)       Special       Parent Object       This folder and tiles only         Allow       Users (LANGSTON)       Read & Execute       Parent Object       This folder and subfol         Allow       Users (LANGSTON)       Read & Execute       Parent Object       This folder         Add       Edit       Bemove       This folder and all child objects. Include these with entries explicitly defined here.         Reglace permission entries on all child objects with entries shown here that apply to child objects       Learn more about access control.							
Allow       SYSTEM       Full Control       Parent Object       This folder, subfolders         Allow       Users [LANGSTON\       Read & Execute       Parent Object       This folder, subfolders         Allow       Users [LANGSTON\       Read & Execute       Parent Object       This folder, subfolders         Add       Edit       Remove         ✓       Allow inheritable permissions from the parent to propagate to this object and all child objects. Include these with entries explicitly defined here.         ■       Reglace permission entries on all child objects with entries shown here that apply to child objects         Learn more about access control.							
Allow       Users [LANGSTDN\       Special       Parent Object       This folder and subfol         Allow       Users [LANGSTDN\       Read & Execute       Parent Object       This folder, subfolders         Add       Edit       Remove         ✓       Allow inheritable permissions from the parent to propagate to this object and all child objects. Include these with entries explicitly defined here.       Reglace permission entries on all child objects with entries shown here that apply to child objects         Learn more about access control.       Edit       Reglace permission entries on all child objects with entries shown here that apply to child objects							
Allow       Users (LANGSTON)       Read & Execute       Parent Object       This folder, subfolders         Add       Edit       Bemove         Allow inheritable permissions from the parent to propagate to this object and all child objects. Include these with entries explicitly defined here.       Reglace permission entries on all child objects with entries shown here that apply to child objects         Learn more about access control.       Edit (Control object)							
Agd       Edit       Remove         ✓       Allow inheritable permissions from the parent to propagate to this object and all child objects. Include these with entries explicitly defined here.         □       Reglace permission entries on all child objects with entries shown here that apply to child objects         Learn more about access control.							
Allow inheritable permissions from the parent to propagate to this object and all child objects. Include these with entries explicitly defined here.     Reglace permission entries on all child objects with entries shown here that apply to child objects     Learn more about <u>access control</u> .		Allow	Users (LANGSTON\	Read & Execute	Parent Object	This folder, subfolders	
Allow inheritable permissions from the parent to propagate to this object and all child objects. Include these with entries explicitly defined here.     Reglace permission entries on all child objects with entries shown here that apply to child objects     Learn more about <u>access control</u> .							
Allow inheritable permissions from the parent to propagate to this object and all child objects. Include these with entries explicitly defined here.     Reglace permission entries on all child objects with entries shown here that apply to child objects     Learn more about <u>access control</u> .				1 -	1		
these with entries explicitly defined here.     Reglace permission entries on all child objects with entries shown here that apply to child objects     Learn more about <u>access control</u> .		Ad	d <u>E</u> dit	<u>H</u> emove			
these with entries explicitly defined here.     Reglace permission entries on all child objects with entries shown here that apply to child objects     Learn more about <u>access control</u> .							
Replace permission entries on all child objects with entries shown here that apply to child objects     Learn more about <u>access control</u> .					gate to this object ar	nd all child objects. Include	
Learn more about access control.		ulese	with entries explicitly define	su nere.			
		Repla	ice permission entries on al	I child objects with er	ntries shown here tha	at apply to child objects	
		-					
		Learn more about access control					
		Loamino					
OK Consel Andre	_						
UN Lancel Acriv					ОК	Cancel Apply	

12 Select the domain users group or workgroup users group in the **Permissions entries** list and click **Edit**.

Permission Entry for TITANIA			? ×	
Object				
Name: Domain Users (TITANIA\Do Apply onto: This folder, subfolders ar		<u>C</u> hange		
Permissions:	Allow	Deny	-	
Full Control Traverse Folder / Execute File List Folder / Read Data Read Attributes Read Extended Attributes Create Files / Write Data Create Folders / Append Data Write Attributes Write Extended Attributes Delete Subfolders and Files Delete Read Permissions				
Apply these permissions to objects and/orClear AllClear All				
	OK	Cano	el	

- Permission Entry for TITANIA ? × Object Name: Domain Users (TITANIA\Domain Users) Change... Apply onto: This folder only -Permissions: Allow Deny ٠ Full Control Traverse Folder / Execute File  $\checkmark$ 2 2 List Folder / Read Data Read Attributes Read Extended Attributes  $\checkmark$ Create Files / Write Data Create Folders / Append Data Write Attributes Write Extended Attributes Delete Subfolders and Files Delete Read Permissions  $\checkmark$ -Cl. ... ... D.....: C Apply these permissions to objects and/or containers within this container only Clear All ΟK Cancel
- 13 Go to the Apply onto drop-down menu and select This folder only.

14 Go to the Permissions section and select the Allow check box associated with the Traverse Folder/Execute File, List Folder/Read Data, Create Folders/Append Data, and Read Permissions options. (The permissions listed in this step are required. You can allow or deny other permissions as needed.)

Permission Entry for TITANIA		<u>?</u> ×
Object		
Name: Domain Users (TITANIA\Doma	ain Users)	Change
Apply onto: This folder only		
Permissions:	Allow	Deny
Full Control Traverse Folder / Execute File List Folder / Read Data Read Attributes Read Extended Attributes Create Files / Write Data Create Folders / Append Data Write Attributes Write Extended Attributes Delete Subfolders and Files Delete Read Permissions		
Apply these permissions to objects a containers within this container only	nd/or	Clear All
	OK	Cancel

15 Click OK to close the Permission Entry for the dialog box.

dvanced S	ecurity Settings for TI	TANIA		?)
Permissions	Auditing Owner Effe	ctive Permissions		
To view more information about special permissions, select a permission entry, and then click Edit.				
Type	Name	Permission	Inherited From	Apply To
Allow	Domain Users (TITA	Special	<not inherited=""></not>	This folder only
Allow	Everyone	Special	<not inherited=""></not>	This folder only
Allow	Administrators (LANG	Full Control	Parent Object	This folder, subfolders
Allow	CREATOR OWNER	Full Control	Parent Object	Subfolders and files only
Allow	SYSTEM	Full Control	Parent Object	This folder, subfolders
Allow	Users (LANGSTON\	Special	Parent Object	This folder and subfol
Allow	Users (LANGSTON\	Read & Execute	Parent Object	This folder, subfolders
Add       Edit       Bemove         Image: Allow inheritable permissions from the parent to propagate to this object and all child objects. Include these with entries explicitly defined here.         Image: Reglace permission entries on all child objects with entries shown here that apply to child objects         Learn more about access control.				
			ОК	Cancel <u>A</u> pply

16 Click Apply and click OK to close the Advanced Security Settings for the dialog box.

TITANIA Propertie	:5		? ×
General Sharing	Security Web	Sharing Custo	mize
<u>G</u> roup or user nar	nes:		
🚮 Administrato	rs (LANGSTON)	Administrators)	
🔣 CREATOR I	OWNER		
🔣 Domain Use	ers (TITANIA\Dor	nain Users)	
🕵 Everyone			
SYSTEM			
		A <u>d</u> d	<u>R</u> emove
Permissions for D	omain Users	Allow	Deny
Full Control			
Modify			
Read & Execut			
List Folder Con	itents		
Read			
Write			
Coordinal Dormin		nan Tanan Tan	
For special permis click Advanced.	ssions or for adva	ncea settings,	Advanced
	OK	Cancel	

17 Click Apply and click OK to close the Properties dialog box.

Repeat this procedure for each second-level folder that represents a domain or workgroup.

Continue to Setting the required permissions for the Omtool server Windows account.

# Setting the required permissions for the Omtool server Windows account

Using the following procedure, set the sharing and security permissions for the Omtool server Windows account. These permissions are set on the top-level folder, and apply to all subfolders in the structure.

To set the sharing and security permissions on the top-level folder:

- I Go to the top-level folder using Windows Explorer. Right-click the folder and select **Properties**.
- 2 Click the **Sharing** tab.

MyFolder Propert	ies <u>?</u>	×
General Sharing	Security Web Sharing Customize	
	n share this folder with other users on your k. To enable sharing for this folder, click Share this	
C Do <u>n</u> ot sha • Share this I		
S <u>h</u> are name:	MyFolder 💌	
Comment:		
User limit:	• Maximum allowed	
	O Allow this number of users:	
	ions for users who access this <u>P</u> ermissions network, click Permissions.	
To configure se Caching.	ettings for offline access, click Caching	
	N <u>e</u> w Share	
	OK Cancel Apply	

3 Click Permissions.

Permissions for MyFolder		? ×
Share Permissions		
<u>G</u> roup or user names:		
🚮 Domain Users (TITANIA\Dor	nain Users)	
👧 Everyone		
	A <u>d</u> d	<u>R</u> emove
Permissions for Domain Users	Allow	Deny
Full Control Change Read	N N N	
	Cancel	

4 Click Add.

Select Users, Computers, or Groups		? X
Select this object type:		
Users, Groups, or Built-in security principals		Object Types
Erom this location:		
titania.omtool.com		Locations
Enter the object names to select (examples):		
		<u>C</u> heck Names
Advanced	OK	Cancel

5 Go to the **Group or user names** section, enter the name of the Omtool server Windows account, click **Check Names**, verify that the account name is resolved, and click **OK**.

Permissions for MyFolder		<u>?</u> ×
Share Permissions		
Group or user names:		
Domain Users (TITANIA\Do	omain Users)	
OmtoolServerAdmin (Omtool	ServerAdmin@titan	ia.omtool.co
Permissions for	(A <u>d</u> d	<u>R</u> emove
OmtoolServerAdmin	Allow	Deny
Full Control		
Change Bead		
OK	Cancel	

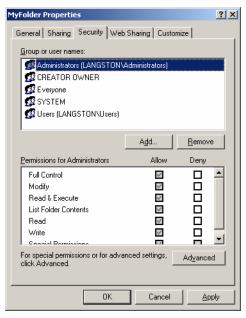
6 Select the Omtool server account in the Group or user names section, go to the Permissions for <Omtool server account> section, and select the Allow check box associated with the Full Control option.

Permissions for MyFolder		? ×
Share Permissions		
Group or user names:		
Domain Users (TITANIA\Do     Domain Users (TITANIA\Do     Do     Everyone     DomoolServerAdmin (Omtool)		nia.omtool.co
Permissions for OmtoolServerAdmin	A <u>d</u> d	<u>R</u> emove
Full Control Change Read	V V V	
OK	Cancel	

7 Click **Apply** and click **OK**.

MyFolder Properties				
General Sharing Security Web Sharing Customize				
You can share this folder with other users on your network. To enable sharing for this folder, click Share this folder.				
O Do not share this folder				
<u>Share this folder</u>				
S <u>h</u> are name: MyFolder				
Comment:				
User limit:				
C Allow this number of users:				
To set permissions for users who access this folder over the network, click Permissions.				
To configure settings for offline access, click Caching Caching				
N <u>e</u> w Share				
OK Cancel Apply				

8 Click the **Security** tab.



9 Click Add.

Select Users, Computers, or Groups	<u>?</u> ×
Select this object type:	
Users, Groups, or Built-in security principals	Object Types
Erom this location:	
titania.omtool.com	Locations
Enter the object names to select ( <u>examples</u> ):	
	<u>C</u> heck Names
Advanced	Cancel

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10 Go to the **Group or user names** section, type the name of the Omtool server Windows account, click **Check Names**, verify that the account name is resolved, and click **OK**.

<b>1yFolder</b> Properti	es					? ×
General Sharing	Security	Web Sh	aring C	ustomiz	e	
<u>G</u> roup or user nan	nes:					
🕵 Administrato	rs (LANGS	TON\Adn	ninistrator	s)		
🖉 🥵 CREATOR (	DWNER					
🕵 Everyone						
🛛 🙍 OmtoolServe	ərAdmin (O	mtoolServ	erAdmin(	@titania	.omtool.	
SYSTEM						<u> </u>
		(	A <u>d</u> d		<u>R</u> emov	e
Permissions for OmtoolServerAdm	nin	_	Allo		Deny	
Full Control				1		
Modify			Ē	1	Н	
Read & Execut	te					
List Folder Con	tents		$\checkmark$			
Read			$\checkmark$			
Write						Ţ
Consist Permis						- 1
For special permis click Advanced.	sions of fo	radvance	a setting:	s, _/	Ad <u>v</u> ance	d
	C	ж	Cano	cel	Ap	ply

II Select the Omtool server account in the **Group or user names** section, go to the **Permissions for Everyone** section, and select the **Allow** check box associated with the **Full Control** option.

MyFolder Propertie	25					? ×
General Sharing	Security	Web	Sharing	Custo	mize	
<u>G</u> roup or user nar	nes:					
🚮 Administrato	•	TON	Administra	tors)		
CREATOR (	JWNER					
🕵 Everyone						
0mtoolServe	erAdmin (O	mtool9	ServerAdm	nin@tita	inia.omtool.	0
SYSTEM						2
			A <u>d</u> d.		<u>R</u> emov	e
Permissions for OmtoolServerAdm	uin.			Jlow	Denv	
Eull Control		_				
Modify				N N	H	
Bead & Execut					H	
List Folder Con	-				H	
Read						
Write						
Coosial Parmia	niana			<b>—</b>		_
For special permis click Advanced.	sions or for	adva	nced setti	ngs,	Ad <u>v</u> ance	ed
	0	IK	C	ancel		ply

12 Click Apply and click OK to close the MyFolder Properties dialog box.

Section 4: Sharing and Security Permissions

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## Section 5: Required Server Configuration

This section includes:

Enabling MyFolder as a recipient type in AccuRoute Desktop (5-1)

# Enabling MyFolder as a recipient type in AccuRoute Desktop

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

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

#### To enable MyFolder as a recipient type in AccuRoute Desktop:

- I Click Groups and select the group of interest. Right-click that group and select Properties.
- 2 In the Clients tab, select Enable members of this group as users.
- 3 Select and click the **MyFolder** connector in the **Allow group to route to** section and click **OK** to save the settings.

Now when you start AccuRoute Desktop, MyFolder is available.

Section 5: Required Server Configuration

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## Section 6: Optional Server Configuration

This section includes:

Changing the label of a document (6-1)

## Changing the label of a document

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

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

#### To change the label of a document type:

- I Click Groups and select the group of interest. Right-click the group and select Properties.
- 2 On the **Clients** tab, select **Enable members of this group as users**.
- 3 Select and click the **MyFolder** connector in the **Allow group to route to** section.

Group			×
Fax Cover Pages Destinations General Members C	Job Properties   Image-In Connec Clients   Prompts   Sc		Folders Web Client Custom Options
	Connector Connector Filescan on the Se MyFolder on the Si ed access to all Embec enticated access to ser Destination, Document , Title, Created, Last U xpires	erver	Configure
	OK	Cancel	Help

- 4 Click **Configure** and click the **Final Forms** tab.
- 5 Highlight the document type that needs to be modified.

Section 6: Optional Server Configuration

Routing D	estination	Properties		X
General	Final Forms			
	hich final for lestination.	ns the AccuRoute	client can send to thi	s
Enable	d Default	File Extension	Description	
		G4.TIF	TIFF (image)	
		PDF	PDF (image)	
		OCR.PDF	PDF (image+OCR to	ext)
		OCR.DOC	DOC (OCR text)	
		OCR.RTF	RTF (OCR text)	
		OCR.TXT	TXT (OCR text)	
1				Þ
		Set	as Default Prope	erties
			ОК С	ancel

- 6 Click Properties.
- 7 Enter the new label for this document type in the **Description** field.

Final Form Prop	erties		×
OCR.PDF			
🔽 Enabled 🔲 Default			
Description:	PDF (image+0CR text)		Reset
		ОК	Cancel

- 8 Click **OK** to close all the open dialogs.
- 9 Repeat the above steps for any other document type for which you want to change the label.

6-2

## Section 7: Client Configuration

This section includes:

Configuring AccuRoute Desktop (7-1)

Configuring FaxCenter (7-1)

Client deployment methods (7-2)

### Configuring AccuRoute Desktop

#### To add MyFolder functionality to AccuRoute Desktop:

- I Start AccuRoute Desktop and log in.
- 2 Click **Tools** on the menu bar and select **Configure DMS**.
- 3 Select MyFolder from the menu that appears. The MyFolder Location window appears.

At this point, the configuration is identical to that of the connector configuration. Perform steps one through four in <u>Configuring a new MyFolder connector</u> (3-5).

Continue to Configuring FaxCenter.

### **Configuring FaxCenter**

#### To add MyFolder functionality to FaxCenter:

- I Start FaxCenter and log in.
- Click Tools on the menu bar and select Configure DMS. The Document Management Configuration screen appears.
- 3 Select MyFolder and click Configure. The MyFolder Location screen appears.
- 4 At this point, the configuration is identical to that of the connector configuration. Perform steps one through three in <u>Configuring a new MyFolder connector</u> (3-5).
- 5 Click OK.

## Client deployment methods

There are two methods available for deploying clients to individual workstations with MyFolder functionality:

- Configure AccuRoute Desktop or FaxCenter to support MyFolder on one client workstation. Then
  copy the Omtool DMS Libraries configuration file to the Omtool DMS Libraries setup directory where
  it can be propagated to client workstations during installation. Continue to <u>Configuring MyFolder for</u>
  client rollout.
- Install AccuRoute Desktop or FaxCenter on each individual workstation and perform the configuration steps for MyFolder manually. Continue to <u>Configuring MyFolder manually</u>.

#### Configuring MyFolder for client rollout

This procedure is optional. If you do not complete this procedure before deploying the Omtool DMS Libraries, you (or the user) must configure the Omtool DMS Libraries to support MyFolder manually after you install AccuRoute Desktop or FaxCenter.

#### To pre-configure the Omtool DMS Libraries for deployment:

- I Install AccuRoute Desktop v4.0 or FaxCenter on a workstation.
- 2 Configure the Omtool DMS Libraries to support MyFolder. Select the settings that should apply to all workstations in your environment.
- **3** Go to the c:\Program Files\Common Files\Omtool directory on the workstation where AccuRoute Desktop or FaxCenter is installed, and copy the OmDMSDB.xml file to the clipboard.
- 4 Go to the Omtool server where AccuRoute Desktop or FaxCenter setup files are located, and paste the file to the following locations. When prompted to replace the existing file, click **Yes**.
  - ... \OmtoolServer \Clients \AccuRouteDesktop \Common \Omtool
  - ... \OmtoolServer \Clients \FaxCenter \Common \Omtool

You have pre-configured the Omtool DMS Libraries setup with the configuration data for MyFolder. When you are ready to deploy MyFolder, launch setup.exe in the AccuRoute Desktop directory.

#### Configuring MyFolder manually

#### To configure MyFolder manually:

• AccuRoute Desktop - (Go to <u>Configuring AccuRoute Desktop</u> on 7-1.) Follow these steps on all AccuRoute Desktop workstations.

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• FaxCenter - (Go to Configuring FaxCenter on 7-1.)

## Section 8: Testing

## Testing the installation and configuration

To test the installation and configuration of Omtool DMS Libraries v4.0 for MyFolder, send a message using AccuRoute Desktop. For detailed information on sending messages using AccuRoute Desktop, consult the user guide. Go to <u>Related AccuRoute 4.0 documentation</u> on 1-3.

#### To send a message to MyFolder using AccuRoute Desktop:

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

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MyFolder	PDF (image+0CR text)	Add E-mail copy to jdoe@engineering.omtool.com
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		jdoe@engineering.omtool.com VMJKAR21NEW

2 Select the destination type **MyFolder** in the **Recipients Type** list and select a file format for your message in the **Format** list.

For more information on the available file formats, consult the AccuRoute Desktop User Guide.

For information on using billing, consult the AccuRoute Desktop User Guide or your system administrator.

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- 3 Click Add. The MyFolder window appears.

4 In the File name text box, enter the file name you wish to assign to your document.

Note that the **Save as type** defaults to match the document format you selected in Step 2. Do not make any changes to this option.

5 From the **Multiple use options** drop-down list, select one of the following:

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Attachment <u>s</u> : 🝙 g	Submitted document(s)	Overwrite original Merge with origin	document al document	Ŧ		
				jdoe@	engineering.omt	ool.com VMJKAR21NEW

**Create new document**. Selecting this option creates a new document in MyFolder. If you select this option and the file name already exists, the following message appears. Click **Yes** to replace the file or click **No** to return to the **MyFolder** window.

\\VMJKAR21NEW\MyFolder\Engineering\Administrator\ProductMemorandum.pdf already exists. Do you want to replace it?
Yes No

**Overwrite original document**. If a document already exists with the file name you selected in Step 4, selecting this option overwrites the original file. Click **Yes** when the following message appears to replace the file or click **No** to return to the **MyFolder** window.

\\VMJKAR21NEW\MyFolder\Engineering\Administrator\ProductMemorandum.pdf already exists. Do you want to replace it?
Yes No

**Merge with original document**. If a document already exists with the file name you selected in step 4, selecting this option merges any file attachments with the original document. The resulting file is stored with the original file name.

Click **Yes** when the following message appears to merge the documents or click **No** to return to the **MyFolder** window.

⚠	\\VMJKAR21NEW\MyF exists. Do you want to replac		y\Administrator\I	ProductMemorandum.pdf already
		Yes	No	

After the message is sent, any attachments on this message will be merged with the original document, resulting in one document stored in MyFolder.

Note that this option is only available when you select **PDF (image)** or **PDF (image+OCR text)** as your document format.

6 Click **Save**. A MyFolder destination appears in the message.

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Recipients Type Format: E-mail Fax MyFolder Porf Painter Porf TFF[mag TxT[0CR] Porf TxT[0CR] Porf Porf TxT[0CR] Po	e) e+OCR text) text) e)	umegt
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Attachments: Submitted document(s) H	here	
	1	idoe@enaineerina.omtool.cor/VMJKAR21NEW

- 7 Add content to your message.
  - **a** Locate the **Content** section at the bottom and type a subject and comments.
  - **b** Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:

**File** - Select this option to attach a file saved from your computer or network share. Browse to the file, select it, and click **Open**. The file appears in the attachments list.

**Web document** - Select this option to attach a web page from the Internet. Type the address of the web document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML), and click **OK**.

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MyFolder	PDF (image+OCR text) RTF (OCR text)	<u>A</u> dd □ E	mail copy to jdoe@engineering.omtool.com
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	TXT (OCR text)		
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			×
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8 Do any of the following:

**Send the message immediately** - Click **Send** on the toolbar. A message box indicates that your message has been sent to the server. (Your message must have at least one attachment.)

#### Save the message as an Embedded

Directive - Click Save ED on the toolbar, type a title for the Embedded Directive, and click Save.

**Print a Routing Sheet that can be scanned with hard copy documents** - Save the message as an Embedded Directive. Then click **Print ED** on the toolbar. AccuRoute Desktop creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your network administrator. (Your message can include both electronic and hard copy documents.)

## Section 9: Troubleshooting

This section includes:

Detecting workflow issues (9-1)

Troubleshooting the message on the Omtool server (9-1)

Troubleshooting the multifunction device (9-3)

Troubleshooting the client (9-3)

Complete these procedures in the order they appear. If you cannot resolve the issue, contact Omtool. (Go to <u>Omtool support and sales</u> on the inside front cover.)

### Detecting workflow issues

After a document has been profiled to MyFolder, the document should arrive at its destination momentarily, but can take up to several minutes when the server workload is high. If a document does not arrive at its destination within a reasonable period of time, begin troubleshooting the environment.

Omtool recommends troubleshooting the workflow in reverse order because this is the easiest way to troubleshoot the setup on your own. When a document does not arrive at its destination, start troubleshooting with MyFolder, continue to the Omtool server, the device (if applicable), and then the client.

Continue to Troubleshooting the message on the Omtool server.

### Troubleshooting the message on the Omtool server

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

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

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

#### To locate the message on the Omtool server:

- I Start the Administrator.
- 2 Go to Omtool Server Administrator > [ServerName] > Messages.

- 3 Look for the message in the In Process queue:
  - a Click In Process.
  - b View All Items.



- c Sort all items by the date submitted.
- **d** Look for the message.
- **Message found** Double-click the message and click the **Journal** tab. You can view the message journal to determine the current state and status of the message. Then monitor the components and confirm that the message is moving through the processing queues on the Omtool server. If the Omtool server stops processing the message (for example, the message seems to be stuck in a processing queue), restart all the Omtool services.

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

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

	Re	cipient Properties	×	
	ſ	General Attachments Re	ecipient Sender Contirmations Journal	
l		Date	Journal Entry	
l		10/05/2005 09:32:57 AM	Dispatch: Fax number normalized to +16036901	
l		10/05/2005 09:32:57 AM	Dispatch: Matched rule All lax numbers to Telco	
l		10/05/2005 09:32:57 AM Dispatch: Processing action for rule "All fa		
l		10/05/2005 09:32:58 AM	Composer Started	
I		10/05/2005 09:32:58 AM	Compose: (locahost - lacalhost) Dacument-cert	

- Message not found Go to step 4 and look for the message in the History queue.
- 4 Look for the message in the History queue:
  - **a** Click **History**. The message could be in either the Successful barometer or the General Failure barometer.
  - b View All Items.

View	Items submitted this week	
	Al Items	N
_	Items submitted today	rs.
	Items submitted yesterday	
	Items submitted this week	
	Items submitted this month	

c Sort all items by the date submitted.

-

- **d** Look for the message.
- **Message found** Double-click the message and click the **Journal** tab. You can view the message journal to determine the cause of the failure.

If the message failed, correct the issue and send the message again. Contact Omtool if you are unable to resolve the issue. (Go to <u>Omtool support and sales</u> on the inside front cover.)

If the journal states that the Omtool server delivered the message but it still has not arrived at its destination, this indicates that the Omtool server transferred the message to MyFolder successfully. Do some advanced troubleshooting on MyFolder to determine why the message is not being delivered to its destination. Contact Omtool if you are unable to resolve the issue. (Go to <u>Omtool support and sales</u> on the inside front cover.)

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

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

Continue to Troubleshooting the multifunction device.

### Troubleshooting the multifunction device

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

Continue to <u>Troubleshooting the client</u>.

## Troubleshooting the client

If the device is working properly, try sending a message from the client to a recipient other than MyFolder. If you are able to send messages to recipients other than MyFolder and MyFolder is operating correctly, contact Omtool. (Go to <u>Omtool support and sales</u> on the inside front cover.)

Section 9: Troubleshooting

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