AccuRoute

CT Summation

Installation and Integration Guide

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Omtool support and sales

Online resources

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

- **Knowledge Base** to access technical articles.
- **Downloads & Docs** to access online documentation, software updates, and downloads.

Customer service and technical support

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

- **Phone**: +1/1 978 327 6800 or +1/1 888 303 8098 (toll-free in the US)
- **Fax**: +1/1 978 659 1301
- **E-mail**: customerservice@omtool.com or support@omtool.com

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

Sales, consulting services, licenses, and training

Contact Omtool Sales using any of the following methods:

- **Phone**: +1/1 978 327 5700 or +1/1 800 886 7845 (toll-free in the US)
- **Fax**: +1/1 978 659 1300
- **E-mail**: sales@omtool.com

Contents

Section 7: Troubleshooting

Section 1: Introduction

This guide contains instructions on deploying the Litigation Support connector for Summation. It is written for system administrators with knowledge of the Omtool server.

This section includes:

Litigation Support connector for Summation

The Litigation Support connector works with Litigation Support software such as Summation to facilitate importing documents to the Litigation Support application.

Users can profile documents using AccuRoute Desktop by specifying Summation as a destination. The Litigation Support connector creates a Summation DII load file that is associated with the appropriate case.

When the user creates and sends the End of Load File Routing Sheet, the *.DII (where * is replaced by the case name) file is copied to its final destination folder.

When the Compose is complete and the End of Load File Routing Sheet is sent, the working folder will be empty and the composed files will reside in the final folder. The final folder contains single page TIFF files for each page referenced by the load file. An OCR text file associated with the entire document might also exist, depending on the configuration of the Litigation Support connector.

For instruction on importing files from Omtool Summation connector to a Summation repository, see: http://support.summation.com/public/tutorials/TT_012_Loading_Images_DII_File.htm.

Release notes

Enhancements

The Litigation Support connector for Summation has been qualified with AccuRoute Desktop v4.0.

Resolved issues

There are no new resolved issues in this release.

Limitations

There are no known limitations in this release.

Related AccuRoute 4.0 documentation

For more information about AccuRoute Desktop and other AccuRoute products, refer to the AccuRoute v4.0 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

Summation documentation

For instruction on importing files from Omtool Summation connector to a Summation repository, see: http://support.summation.com/public/tutorials/TT_012_Loading_Images_DII_File.htm.

Section 2: Requirements

This section includes:

Server requirements

The server requirements are:

- ❒ AccuRoute v4.0.

  To check the version of the server, start the Omtool Server Administrator. Expand the items in the console tree if necessary. Right-click the server and select **Properties**.

- ❒ Valid Litigation Support connector license key

  For information on how to purchase the license key, contact omtool sales.

Entering a license for the Litigation Support connector

Note The Litigation Support connector requires a license. For more information, contact Omtool Sales.

You can activate the Litigation Support connector license in one of two ways:

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

Automatic license activation

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

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

Manual license activation

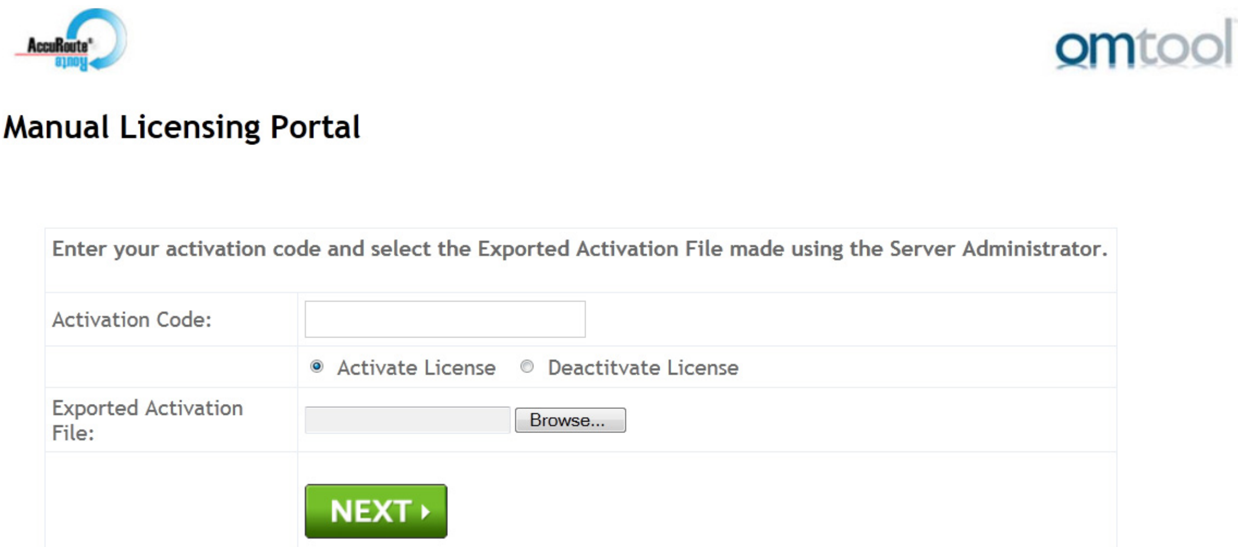
Have available a copy of the activation code.

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

1. Click **Start > All Programs > Omtool > AccuRoute Server > AccuRoute Server Administrator**.
2. Expand the tree view and select the server name.
3. Right-click and select the **Licensing** option**.** The **Licensing** page is displayed.
4. Click the **Activate License...** button. The **License Activation** page is displayed.
5. Select the **Export activation file for manual activation** option.
6. Create an Export license file:
    a. Browse to a location where you want to save the license file. By default, the file is an Export file named `ManualActivation.exp`. After specifying the file name and location, click **Save**.
    b. The path will appear in the **Export Filename** field on the **License Activation** page. Click **OK**.
7. From a system with internet access, launch the web browser and go to:

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

The **Manual Licensing Portal** page opens.



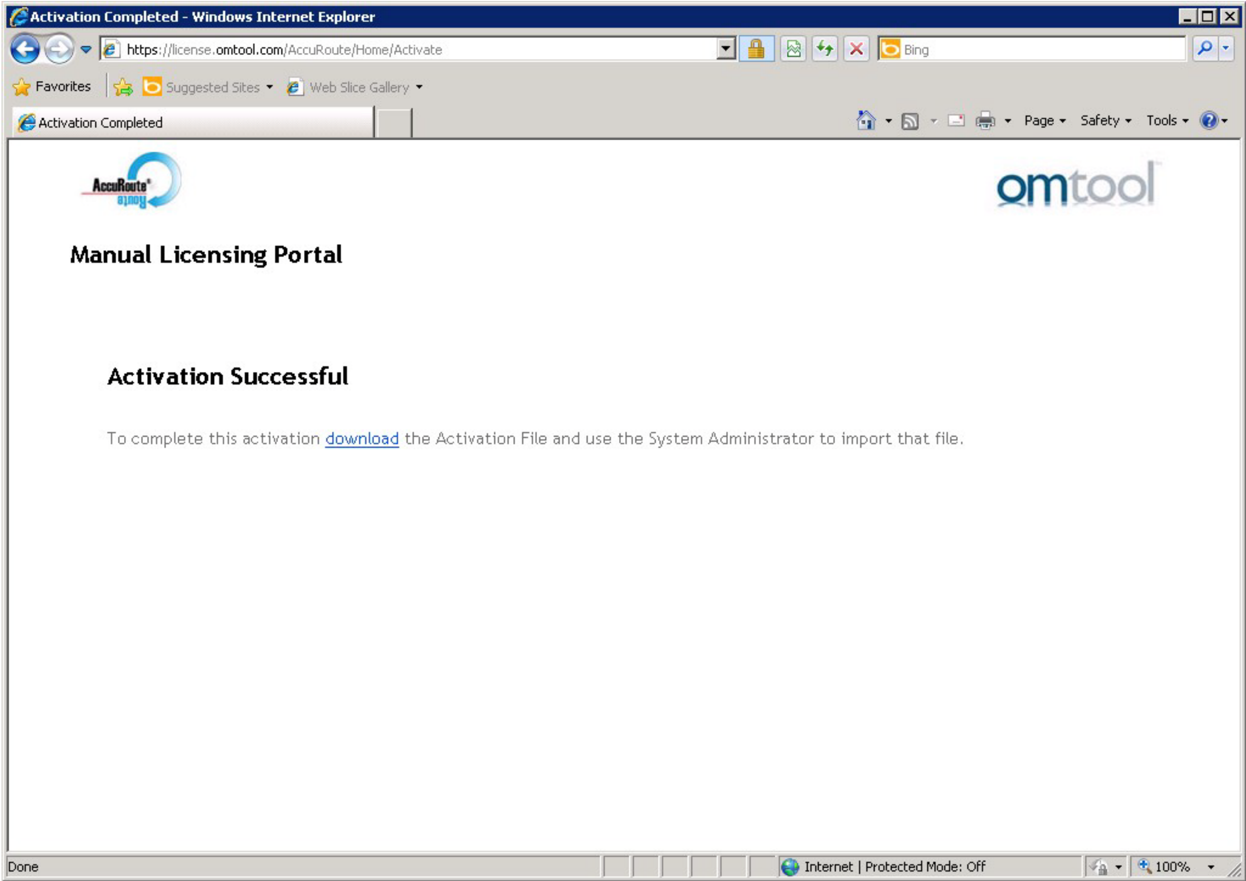
8 Enter your license activation code in the **Activation Code** text field.

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

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

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

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



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

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

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

16 Click **Close**.

Note You can minimize or close the browser.

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

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

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

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

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

Client requirements

The client requirements are:

❐ AccuRoute Desktop v4.0. For more information, see Reinstalling AccuRoute Desktop on all client systems.

Supported Summation versions

Supported Summation version is:

- Summation iBlaze and LG Gold, versions 2.6+ (current version is 2.9.1)
- Summation Enterprise, version 2.x (current version is 2.6.0)

Section 3: Installation

This section includes:

Downloading the Litigation Connector for AccuRoute v4.0

The Litigation Connector for AccuRoute v4.0 is available for download for a separate fee. Contact omtool sales for information on how to purchase the connector.

To download the Litigation Connector for AccuRoute v4.0:

1. Open Internet Explorer browser and go to http://www.omtool.com/support.
2. Log in using the customer number provided to you when you purchased the connector.
3. Locate the module **Litigation Connector for AccuRoute v4.0** in the **Downloads & Docs** section.
4. Download the module and save it to a local drive.
5. Extract the files to a location on your AccuRoute server.

Special instructions for clustered servers

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

To apply the Litigation Connector for AccuRoute v4.0 to AccuRoute servers in a cluster:

1. Shut down the secondary server.
2. Stop the Cluster Manager service in the primary server.
3. Apply the connector to the primary server. Go to Applying the Litigation Connector for AccuRoute v4.0.
4. Start the secondary server.
5. Shut down the primary server.
6. Stop the Cluster Manager service in the secondary server.

7 Apply the connector to the secondary server. Go to [Applying the Litigation Connector for AccuRoute v4.0](#).

8 Start the primary server.

9 Confirm that the primary server has resumed the workload in the cluster.

Applying the Litigation Connector for AccuRoute v4.0

To apply the Litigation Connector for AccuRoute v4.0:

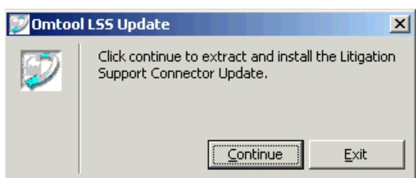
1 Go to the location where you saved the `ARS2.3-LitigationConnector.exe` file.

2 Shutdown all Omtool services.

Note Since the installation of this connector requires shutdown of all services, you must plan to install the connector after hours or at a time when production will not get affected.

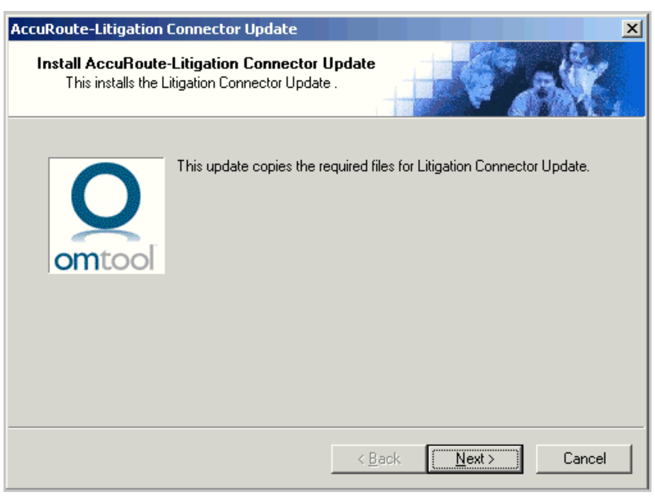
3 Double-click the executable.

The **Omtool LSS** page opens prompting you to extract and install the connector.

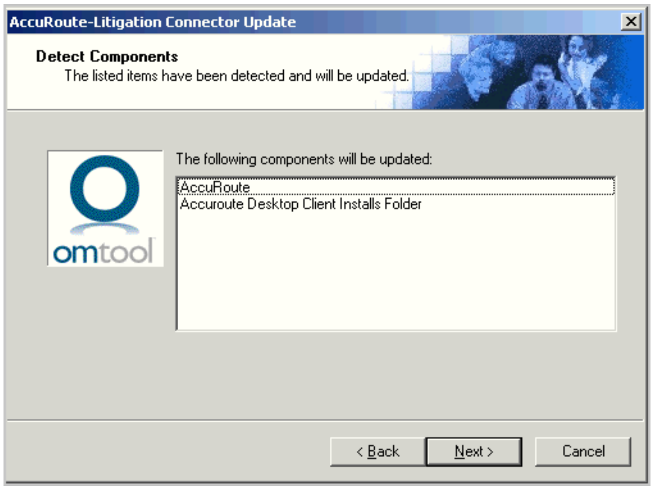


4 Click **Continue** to extract the files to a temporary location on your system.

When extraction is complete, the **AccuRoute-Litigation Connector** page opens.

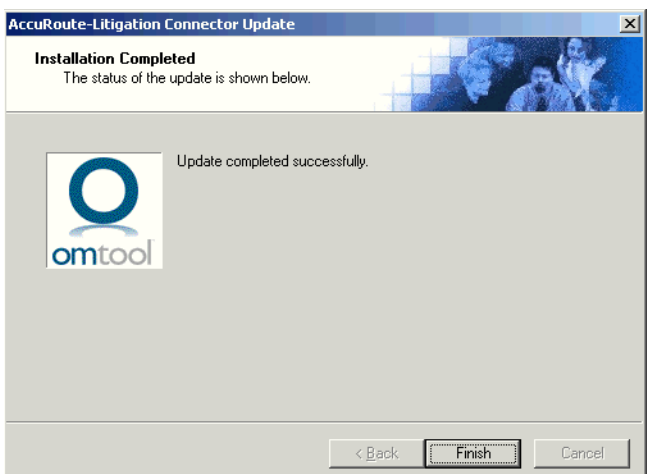


5 Click **Next**. The **Detect Components** page opens listing all the components that will be installed.



6 Click **Next** to begin the installation.

A progress bar shows the status of the installation. When installation is complete you see the **Installation Completed** page.



7 Click **Finish** to exit the wizard.

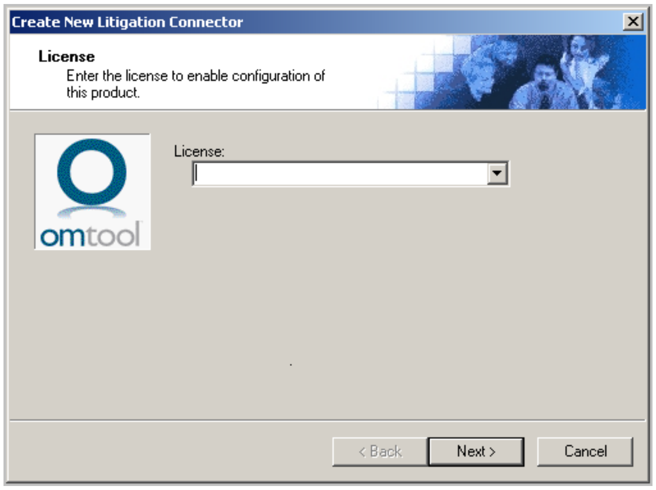
Adding the Litigation Support connector to the AccuRoute server

Note If you have an existing LSS connector, delete the existing connector, install the Litigation Connector for AccuRoute v4.0 and then add a new LSS connector.

To add the Litigation Support connector for Summation:

1 Open the Omtool Server Administrator console.

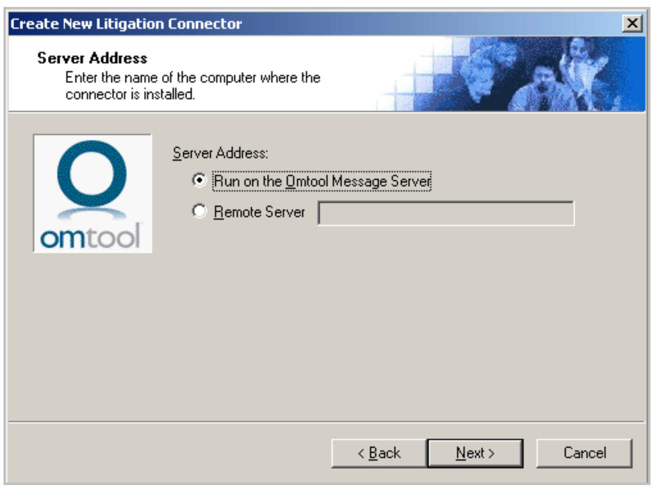
2 Right-click **Connectors** in the console tree and select **New > Litigation Support Connector**. The **License** page opens.



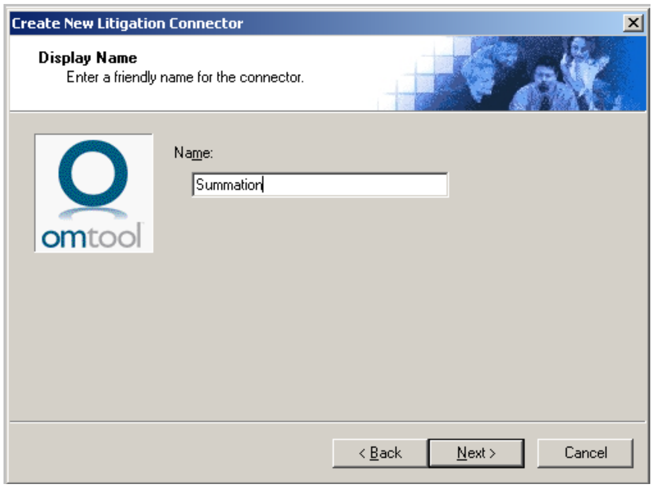
3 In the **License** text box, enter the license key for the Litigation Support System connector.

Note If you do not have a license, contact omtool sales.

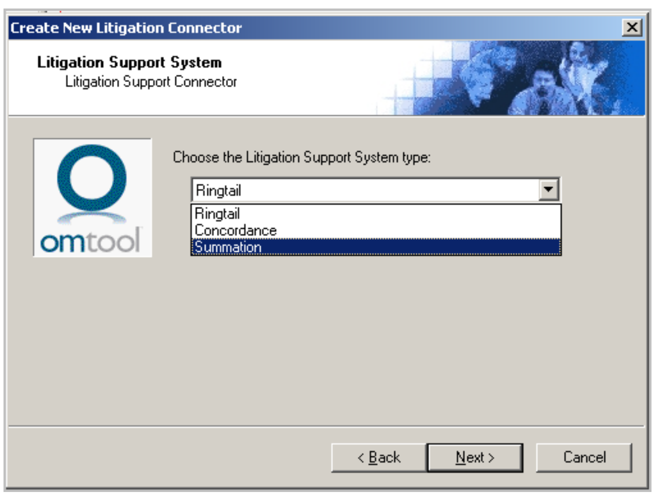
4 Click **Next**. The **Server Address** page opens.



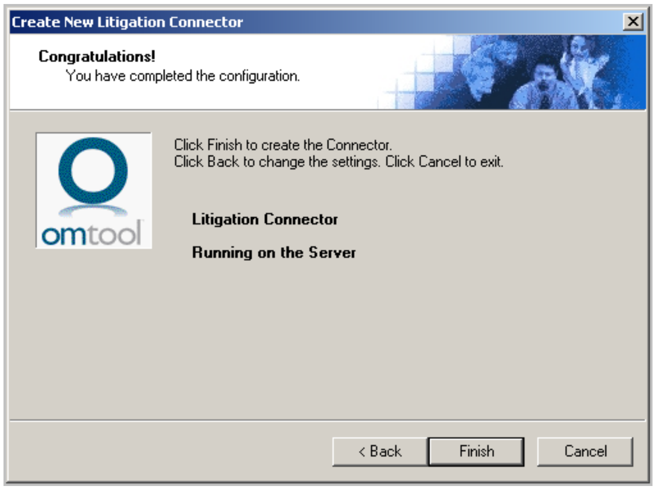
5 Click **Next**. The **Display Name** page opens.



6 Enter a descriptive name for this connector in the **Name** text box and click **Next**. The **Litigation Support System** page opens.



7 Select **Summation** from the drop-down list and click **Next**. The **Congratulations** page opens.



8 Click **Finish**.

The Litigation Support connector for Summation is listed in the **Details** pane.

Reinstalling AccuRoute Desktop on all client systems

After you have installed the Litigation Connector for AccuRoute v4.0 on the server, new setup files for the AccuRoute Desktop are available in the `C:\Program Files\omtool\Omtool Server\clients\AccuRouteDesktop` folder. You must reinstall AccuRoute Desktop on all client systems using the new setup files from this folder to take advantage of the AccuRoute Desktop v4.0 enhancements.

For more information on how to install AccuRoute Desktop, see the AccuRoute Desktop installation guide.

Section 4: Required Configurations

This section includes:

Pre-configuring Summation cases directory structure

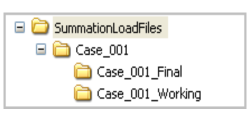
Create a directory structure for the case load files. After creating the directory structure, set sharing and security permissions on each folder.

Creating a directory structure to support Summation cases

Note If you add cases to Summation after the initial setup of the connector, you will need to add them to the directory structure for Summation as well.

To create the Summation directory structure:

1. Create the top level folder named Summation Load Files and give it a descriptive name.
2. Under the Summation Load Files folder, create a sub-folder for every case with which you want to work, for example **Case_001**.
3. Within each case's sub-folder create a **Working** folder and a **Final** folder. The directory structure should be similar to the one shown here:



The above illustration is a valid directory structure for Summation.

Setting sharing permissions and security permissions

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

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

- All Summation users must be able to access all levels of the Summation Load Files structure.
- All Summation users must be able to create folders on the level below the Summation Load Files folder.

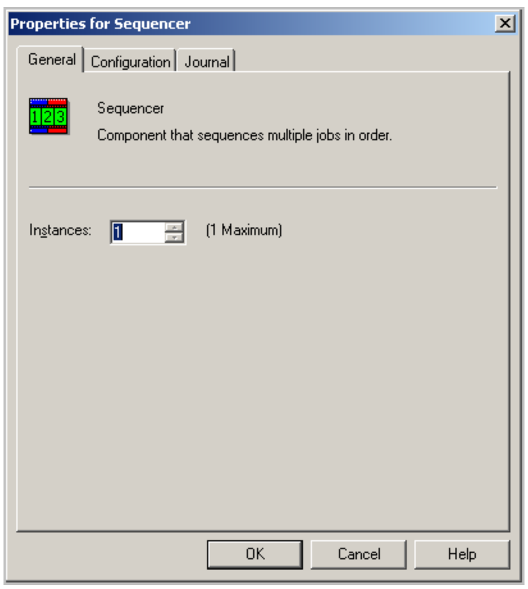
- The Windows account associated with the Omtool server must have access to all levels of the Summation Load Files structure and security permissions with Full Control.
- The user account associated with Summation must have access to all levels of the Summation Load Files structure and security permissions with Full Control.
- If you are in a clustered environment, you must locate case directories on a high profile server.

Configuring the Sequencer component

To configure the Sequencer component:

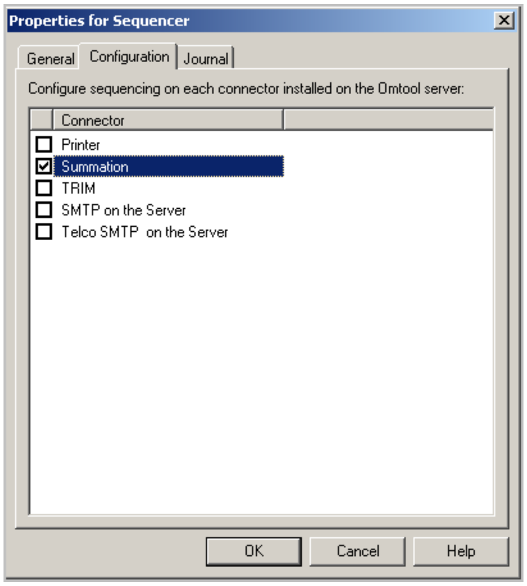
1 Start Omtool Server Administrator.

2 Click **Components** in the console tree, and double-click the **Sequencer** component in the details pane.



3 Click the **Configuration** tab. A list of installed destination connectors appears.

4 Select the Summation connector. If you want to view the connector names in alphabetical order, click **Connector** in the title bar.



5 Click **OK**.

When you enable the Summation connector for sequencing, the Sequencer component creates an internal queue for the connector. Submitting a job to the Summation connector adds it to the internal queue in the order in which it was submitted. After a successful Compose, the Sequencer component holds the job in the queue until any previous jobs to the Summation connector have completed composing.

Configuring registered users

If you have added support for Summation 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 Omtool server, complete this procedure once to modify user defaults and once for each individual user.

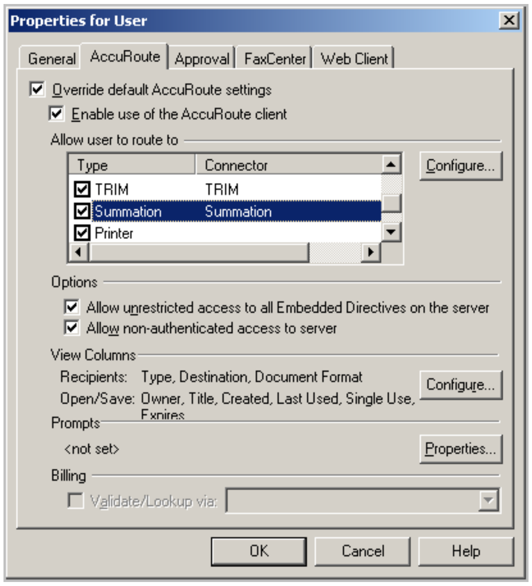
To enable Summation as a recipient type in AccuRoute Desktop for default or individual registered users:

1 Click **Registered Users** in the console tree and double-click an individual user in the details pane, or right-click **Registered Users** in the console tree and select **User Defaults**.

2 Click the **AccuRoute** tab.

3 Select **Enable use of the AccuRoute Client**.

4 Locate the **Allow user to route to list** and select **Summation**.



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

Note Changes made to **Registered Users > User Defaults** do not affect any individual registered user. Individual registered users will need to be modified separately (using the same procedure described here, Summation as a recipient type must be enabled for them) before they can see Summation listed as a recipient type in their AccuRoute Desktop.

Summation is now available as a recipient in AccuRoute Desktop.

Section 5: Configuring Cases

This section includes:

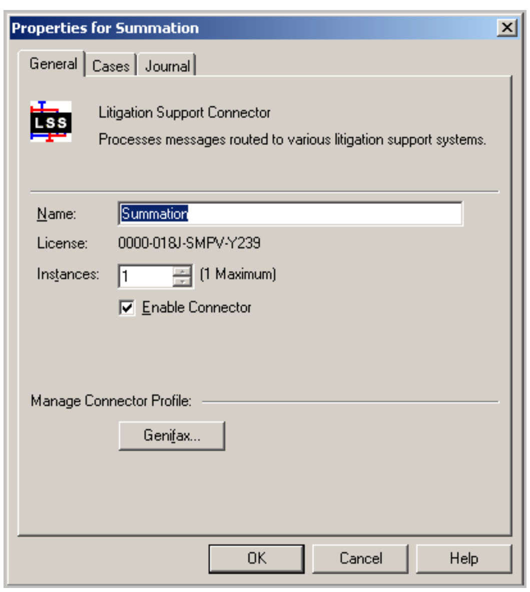
Adding cases to the Litigation Support System connector

Note If you add cases to Summation after the initial setup of the connector, you will need to add them to the Litigation Support connector for Summation as well.

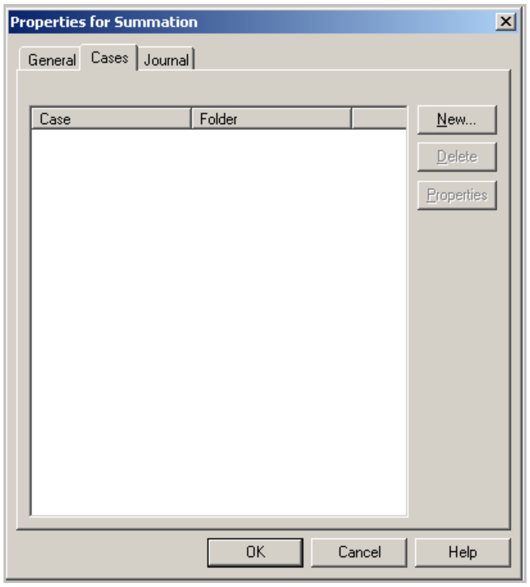
To add a new case:

1 Start Omtool Server Administrator.

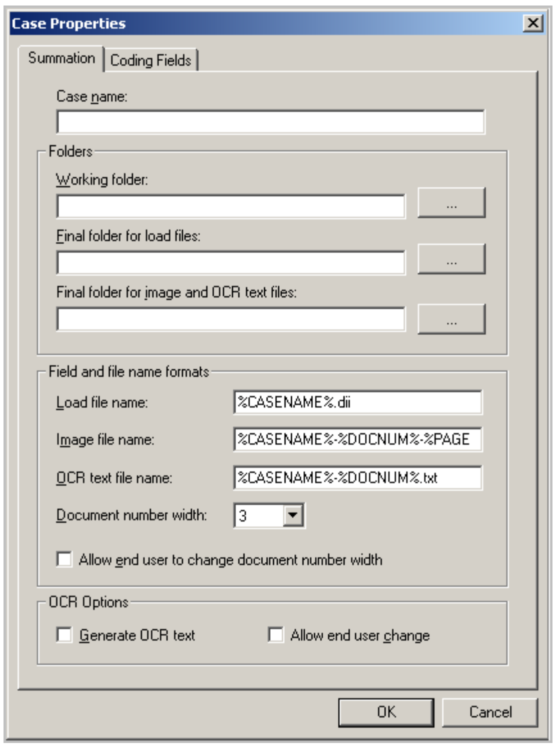
2 Click **Connectors** in the console tree, and double click the Litigation Support System connector in the details pane. The **Properties** page opens.



3 Click the **Cases** tab.



4 Click **New**. The **Case Properties** page opens.



5 In the **Case name** text box, enter a name for the case.

6 In the **Working folder** text box, click the **Browse** option. Navigate to the working folder for the case load file.

7 In the **Final folder for load files** text box, click the **Browse** option. Navigate to the final folder for the case load file.

Load files are stored in the working folder until the end of load file Routing Sheet is received by the Omtool server. When the end of load file Routing Sheet is received, the Litigation Support connector for Summation copies the files from the working folder to the final folder.

8 In the **Final folder for image and OCR text files** text box, provide the path to the Final folder. All Image and OCR text files are stored in this location.

9 In the **Field and file name formats** section, configure the following options. For more information on the Field and file name formats section, see More on the Field and file name formats section:

- In the **Load file name** text box, enter the load file name. This name is set for the load file.
- In the **Image file name** text box, enter the name of the TIF file without the path to the file.
- In the **OCR text file name** text box, enter the name of the OCR text file without the path.
- In the **Document number width** drop down, select a width. The Width field is used to control the width of the number field used to number document and page files. Valid widths are: 2, 3, 4, 5, 6, and 7. For example if the Width is set to five, the resulting file name will be 00001.tif. In most cases, documents will be numbered starting with the specified number. If there is a document with a higher number already referenced in the load file, however, the starting number will begin at the next highest number.

To allow the person routing the document to specify a width, check the box beside **Allow end user to change document number width**.

Note Document number width should not be changed till the case is closed as this may lead to issues with document naming.

10 In the **OCR Options** section, you can optionally configure the following:

- Check the box beside the **Generate OCR text** option. Selecting this option will create OCR text files in addition to the single page TIF files. OCR text files are searchable when imported into Concordance. If this option is not selected, only the single page TIF files are created, and the document is not searchable within Concordance.
- To allow the person routing the document to specify OCR generation, check the box beside **Allow end user change**.

11 Click **OK** to save your changes and create the case.

More on the Field and file name formats section

The options in the Field and file name formats section support substitutions of the following variables:

- `%CASENAME%` - The case name as entered in the Case Name text box
- `%DOCNUM%` - The document number assigned by the connector
- `%PAGENUM%` - The page number of the document assigned by the connector
- `%SEQNUM%` - The documents saved are numbered in sequence.

Adding custom user-defined fields to the Litigation Support System connector (optional)

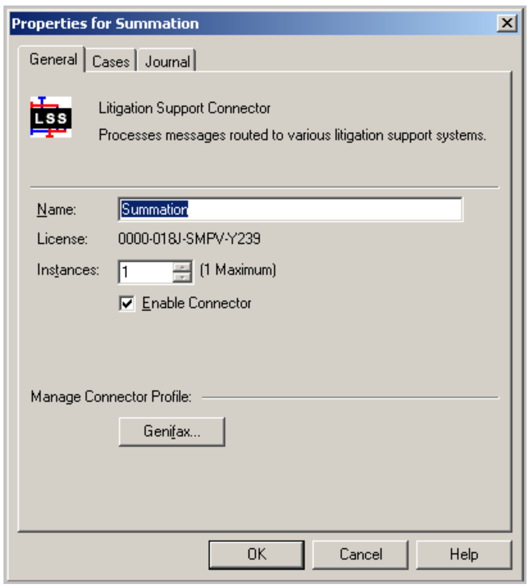
The Coding Fields tab allows you to add or modify custom user defined fields that are explicitly supported by Summation.

Note You should not add new Coding fields to a case till it is closed as the information may not be correctly updated in the load file

To add a custom user-defined field:

1 Open the Omtool Server Administrator.

2 Click **Connectors** in the console tree, and double click the Litigation Support System connector in the details pane. The **Properties** page opens.

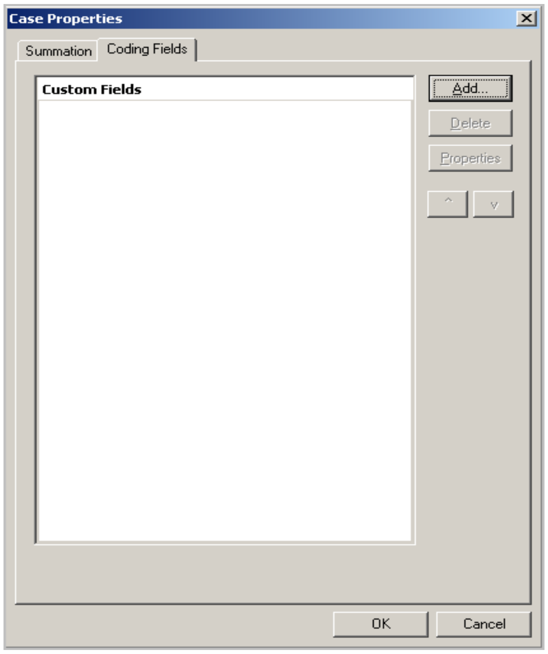


3 Click the **Cases** tab.

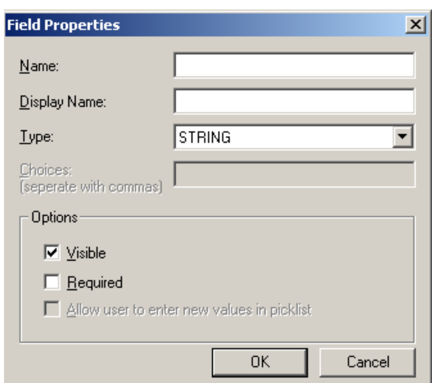
4 Click **New**. The **Case Properties** page opens.

5 Configure the case as needed.

6 Click the **Coding Fields** tab.



7 Click **Add**. The **Field Properties** page opens.



8 In the **Name** text box, enter the field name as it exists in Summation. This is the actual, unique field name and not a display name.

9 In the **Display Name** text box, enter a descriptive name for the field you are adding. The name you enter here appears as a label on the Coding Fields tab in both the Litigation Support System connector for Summation and AccuRoute Desktop.

10 From the **Type** drop-down list, select one of the following values. The value you select determines the kind of control that is presented to the AccuRoute Desktop user on the Coding Fields tab when adding a Summation destination.

- **STRING** - This type stores characters and words, and is included within double quotation marks. Numbers and other numerical characters are treated as text. For example: "`This is string value number 1.`"

- **NUMBER -** This type stores whole numbers. For example: `250`
- **BOOLEAN -** This type presents a true/false choice for the field. Select the check box if the property is true, clear the check box if the property is false. For example: `Active case?` ❑
- **DATE -** This type defaults the value of the field to today's date. The date is presented in mm/dd/yyyy format, and the AccuRoute Desktop user can change the date. For example: `12/05/2006`
- **PICK -** This type presents a pick list of data to the AccuRoute Desktop user via a drop-down box. When you select this type, the **Choices** and **Allow any value in PICK fields** are enabled. For example, the following values could appear on a pick drop-down list: `1 2 3 4 5`

11 In the **Choices** text box, enter the valid values in this field, separated by a delimiter. Valid delimiters are comma (`,`), pipe (`|`), and semicolon (`;`).

Important This text box is enabled only for the data type **Pick**.

12 In the **Options** section, select one or more of the following options:

- **Visible -** If this option is selected, the custom field is visible to the AccuRoute Desktop user on the Coding Fields tab. If this option is not selected, the AccuRoute Desktop user cannot see the custom field on the Coding Fields tab. Some fields specific to Summation are always enabled.
- **Required -** If this option is selected, the custom field is required when adding a Summation destination within AccuRoute Desktop. Selecting this option makes the custom field visible to the AccuRoute Desktop user even if the Visible option is not selected. If this option is not selected, the AccuRoute Desktop user can choose not to include information for this field on the message.
- **Allow user to enter new values in picklist -** If this option is selected, when the AccuRoute Desktop user sees a field on the Coding Fields tab that contains a pick list, the user can enter information not included on the pick list. If this option is not selected, the AccuRoute Desktop user is restricted to the choices displayed in the pick list.

13 Click **OK** three times to save your changes and close the **Properties** page.

Modifying custom user-defined fields in the Litigation Support System connector for Summation

To modify a custom user-defined field:

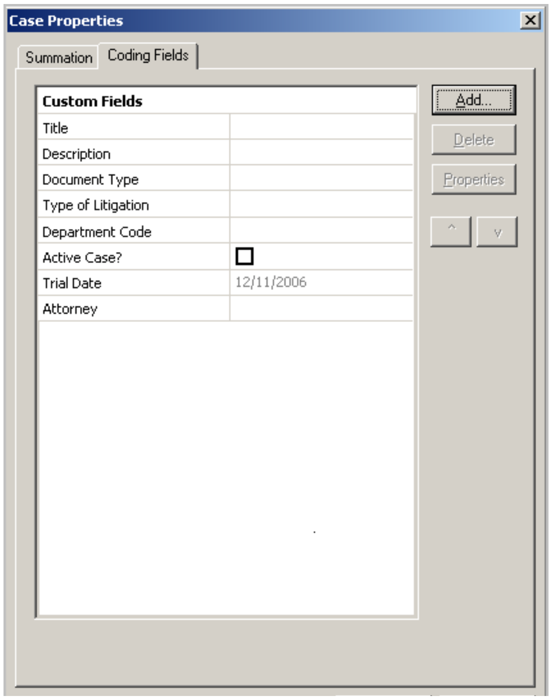
1 Open the Omtool Server Administrator.

2 Click **Connectors** in the console tree, and double click the Litigation Support System connector in the details pane. The **Properties** page opens.

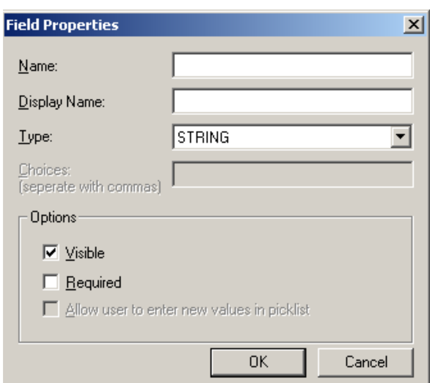
3 Click the **Cases** tab.

4 Highlight a case and click **Properties**. The **Case Properties** page opens.

5 Click the **Coding Fields** tab.



6 Highlight a field and click **Properties**. The Field Properties page opens.



7 Make any changes necessary and then click **OK** to save your changes.

Section 6: Testing

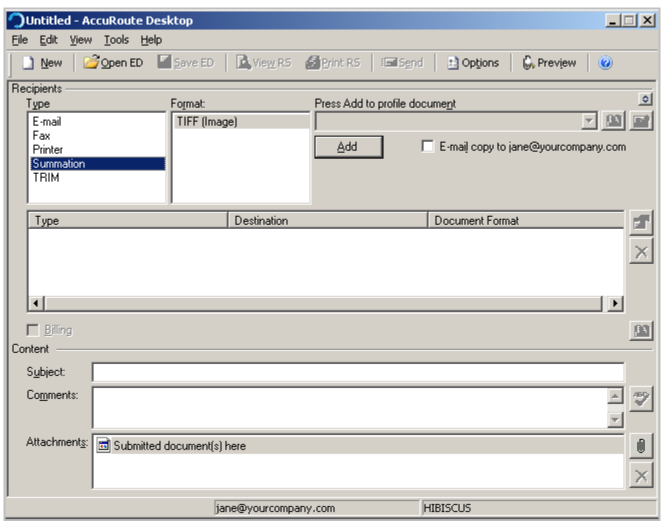
This section includes:

Sending a message to Summation from Accuroute Desktop

Use the following procedure to send a message using AccuRoute Desktop. For detailed information on sending messages using AccuRoute Desktop, consult the AccuRoute Desktop installation guide.

To send a message using AccuRoute Desktop:

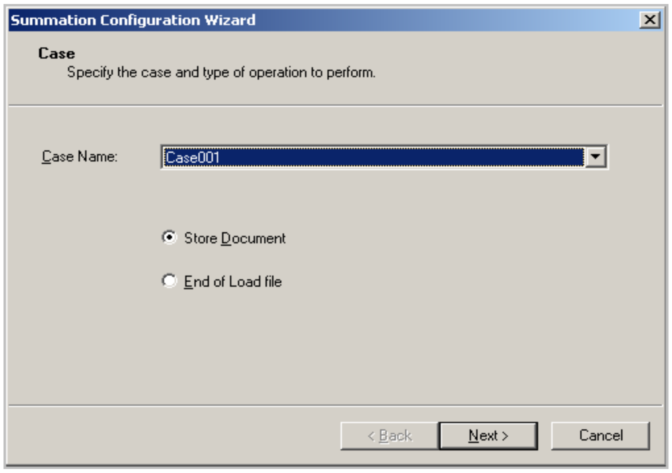
1 Start AccuRoute Desktop. Log in if prompted. The AccuRoute Desktop application opens.



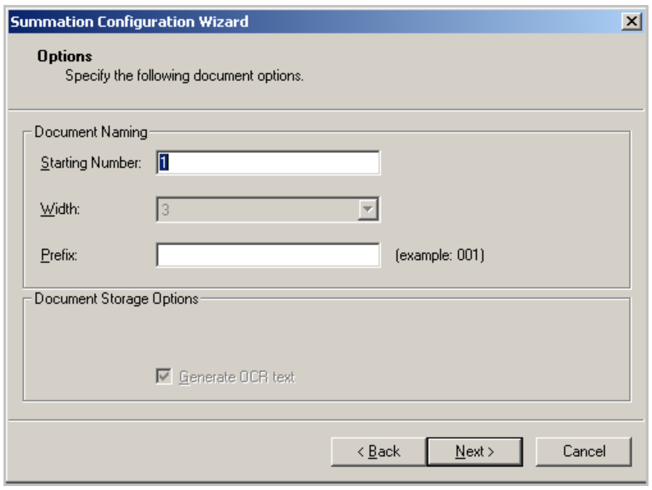
2 Select **Summation** in the **Recipients** list.

3 Verify that TIFF (image) is selected as the file format.

4 Click **Add**. The **Summation Configuration Wizard** opens.



5 From the **Case Name** drop-down, select a case. Click **Next**. The document **Options** page opens.



6 In the **Starting Number** text box, enter a starting number or accept the default of `1`.

In most cases, documents will be numbered starting with the specified number. If there is a document with a higher number already referenced in the load file, however, the starting number will begin at the next highest number.

The starting field is added to the file name during the Compose process. For example, if Width is set to six, the resulting file name will be 000001.tif. The starting number (in this example 000001) indicates the first individual file number of the single page files.

7 In the **Width** text box, enter the document width. The document number width should not be changed till the case is closed as this may lead to issues with document naming.

Note The **Width** text box is grayed out if the **Allow end user to change document number width** option is not checked in the case.

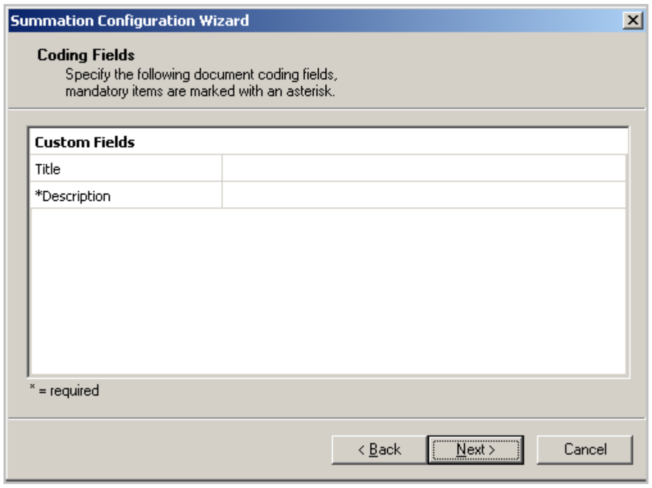
8 In the **Prefix** text box, enter a document prefix.

Note The same prefix value should be specified till a case is closed.

9 Optionally, select the **Generate OCR text** option in the **Document Storage Options** section.

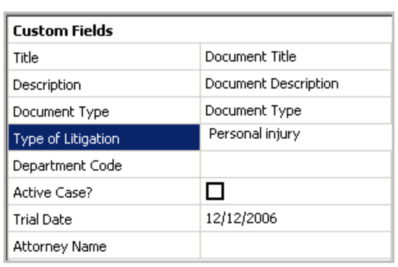
Note This option is grayed out if the **generate OCR text** option is configured in the case and **Allow end user to change document number width** option is not checked in the case.

10 ClicK **Next**. The custom fields page opens.



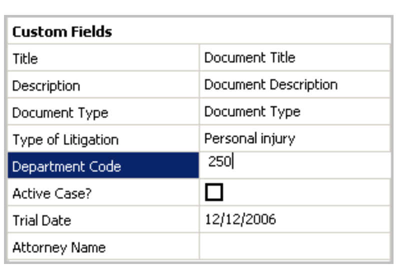
11 Enter information for any custom user-defined fields. If it is a required field, (marked with an *) you must enter information for that field. Shown below are some examples of custom fields and their possible value.

String - If a custom user-defined field is defined as a string value field, you can enter alpha or numeric text.



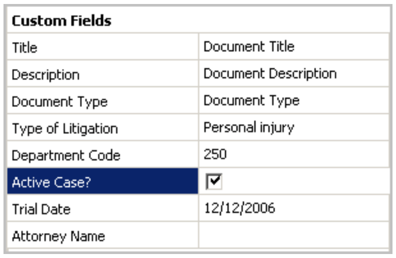
Custom Fields	
Title	Document Title
Description	Document Description
Document Type	Document Type
Type of Litigation	Personal injury
Department Code	
Active Case?	☐
Trial Date	12/12/2006
Attorney Name	

Number - If a custom user-defined field is defined as a number field, you can only enter whole numbers.

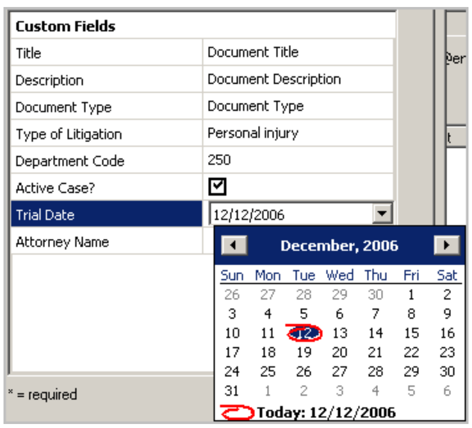


Custom Fields	
Title	Document Title
Description	Document Description
Document Type	Document Type
Type of Litigation	Personal injury
Department Code	250
Active Case?	☐
Trial Date	12/12/2006
Attorney Name	

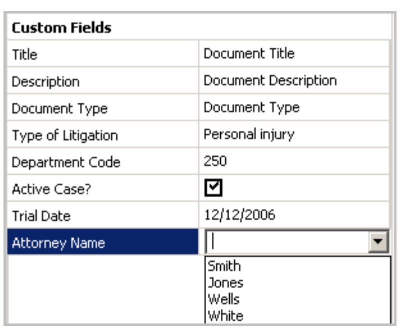
Boolean - If a custom user-defined field is defined as a boolean field, select the check box if the answer is true, and clear the check box if the answer is false.



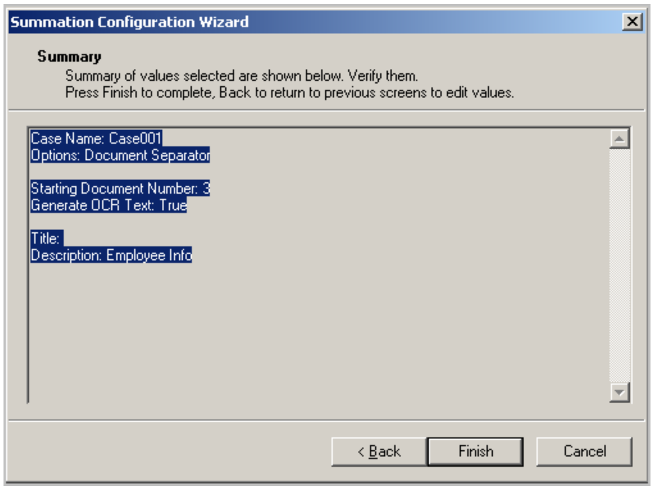
Date - If a custom user-defined field is defined as a date field, the field defaults to today's date. To change the date, click on the date, click the down arrow, and select the correct date from the calendar that appears.



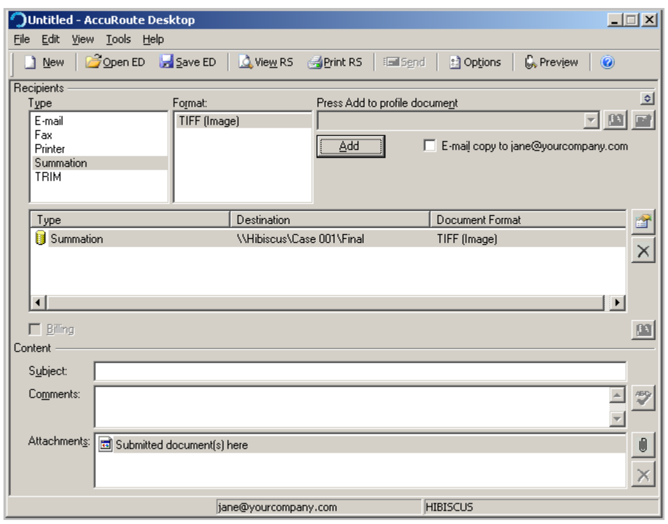
Pick - If a custom user-defined field is defined as a pick-list field, select a value from the drop-down list. Depending on your system's configuration, you may be able to enter your own values.



12 Click **Next.** A **Summary** page opens listing all the information you have entered in the wizard.



13 Click **Finish** to close the wizard. The Summation destination appears in the message.



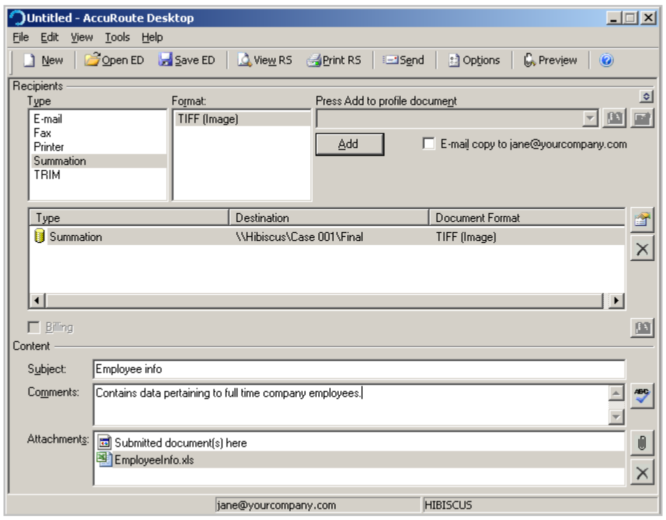
14 Add content to your message.

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. Go to the file, select it, and click **Open**. The file appears in the attachments list.

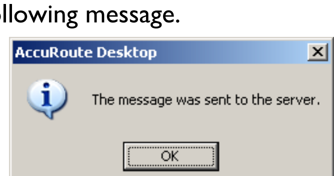
Web document - Select this option to attach a web page from the Internet. Enter the address of the web document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML), and click **OK**.



15 Send or save the message. You can do one of the following:

- **Send the message immediately -** To send the message, click **Send** on the toolbar. (Your message must have at least one attachment.)
- **Save the message as an Embedded Directive -** To save as an Embedded Directive, click **Save ED** on the toolbar. In the Save As page, enter a descriptive title in the Title text box. Click **Save**.
- **Print a Routing Sheet that can be scanned with hard copy documents -** To generate a Routing Sheet, save the message as an Embedded Directive. Then click **Print RS** 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.)

When you send a message and it is delivered to the AccuRoute sever for processing, you will see the following message.



After the messages are processed by the server, the output TIFF and OCR text files are generated in the **Final** folder. The load file (with DII format) is generated in the **Working** folder.

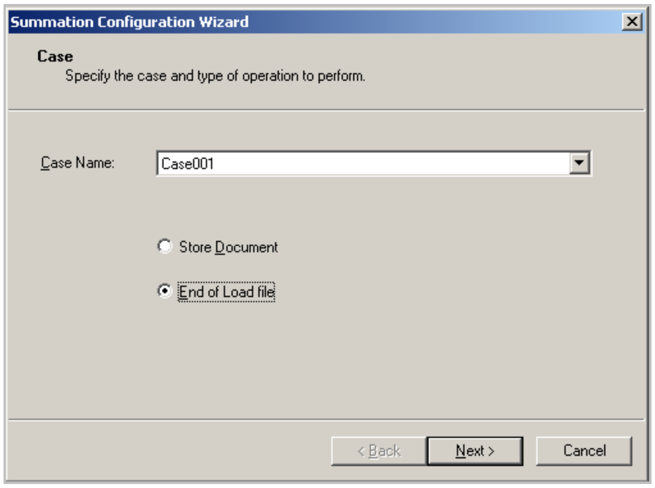
Sending an End of Load file using AccuRoute Desktop

1 Start AccuRoute Desktop. Log in if prompted. The AccuRoute Desktop application opens.

2 Select the Recipient type **Summation** in the **Recipients Type** list.

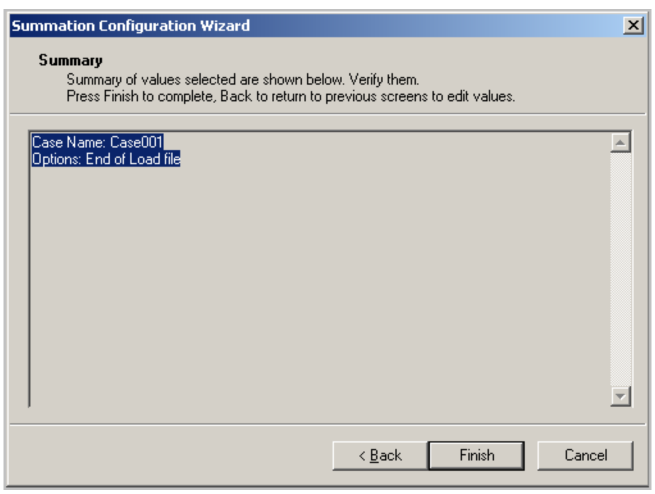
3 Verify that TIFF (image) is selected as the file format.

4 Click **Add**. The **Summation Configuration Wizard** opens.



5 From the **Case Name** drop-down, select a case name and then select **End of Load File** option.

6 Click **Next.** A summary page opens.



7 Click **Finish** to close the wizard.

The Summation destination appears in the message.

Add content to your message.

a Locate the **Content** section at the bottom and enter a subject and comments.

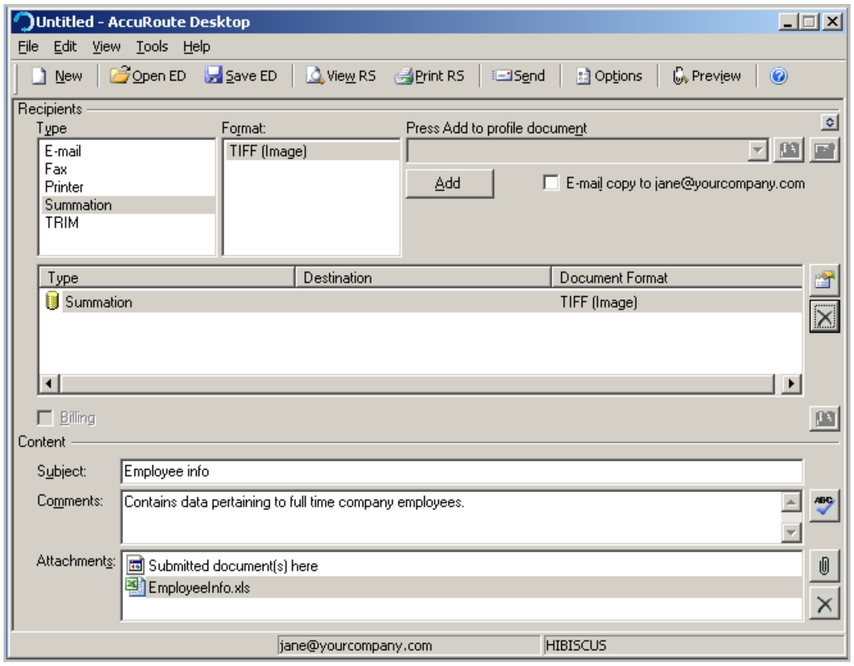
b Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:

File - Select this option to attach a file saved from your computer or network share. Go 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. Enter 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).

Note Any content that you add to an End of Load File is not saved. An attachment is added only to send the message from the AccuRoute Desktop application.

8 Click **OK**.



9 Optionally, save the message. You can do one of the following:

- **Send the message immediately -** Click **Send** on the toolbar. (Your message must have at least one attachment.)
- **Save the message as an Embedded Directive -** To save as an Embedded Directive, click **Save ED** on the toolbar. In the Save As page, enter a descriptive title in the Title text box. Click **Save**.
- **Print a Routing Sheet that can be scanned with hard copy documents -** To generate a Routing Sheet, save the message as an Embedded Directive. Then click **Print RS** 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.)

10 Send the end of load file Routing Sheets through the standard network scanning process.

When you send a message and it is delivered to the AccuRoute sever for processing. After the messages are processed by the server, the output TIFF and OCR text files are generated in the Final folder. The load file (with DII format) is generates in the Working folder.

Section 7: Troubleshooting

This section includes:

Complete these procedures in the order in which they appear. If you cannot resolve the issue, contact Omtool.

Detecting workflow issues

After a document has been profiled to Litigation Support connector for Summation, 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, troubleshooting starts with Litigation Support connector for Summation, and then continues to the Omtool server, the device (if applicable), and then the client.

Continue to Troubleshooting the delivery mechanism.

Troubleshooting the delivery mechanism

When the Omtool server finishes processing a message, an outbound connector routes the message directly to its destination or passes the message to Litigation Support connector for Summation. Do some basic troubleshooting on the Litigation Support connector for Summation. For example, is the connector enabled? If the Litigation Support connector for Summation is functioning correctly, troubleshoot the message on the Omtool server.

Continue to Troubleshooting the message on the Omtool server.

Troubleshooting the message on the Omtool server

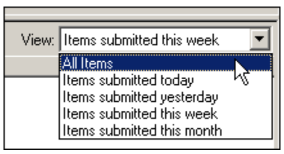
There are two important questions that can be resolved when troubleshooting a message on the Omtool server:

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

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

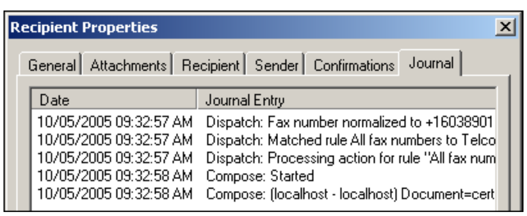
To locate the message on the Omtool server:

1. Start the Administrator.
2. Go to **Omtool Server Administrator > [ServerName] > Messages**.
3. Look for the message in the In Process queue:
   a. Click **In Process**.
   b. View **All Items**.



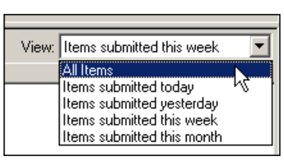
   c. Sort all items by the date submitted.
   d. Look for the message.

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



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

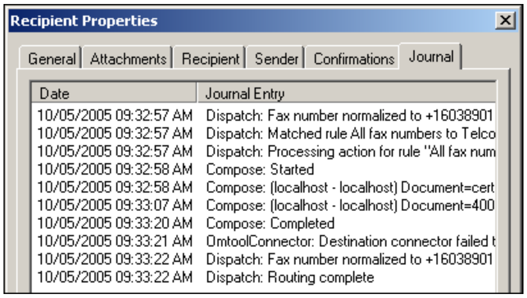
4. Look for the message in the History queue:
   a. Click **History**.
   b. View **All Items**.



   c. Sort all items by the date submitted.

d Look for the message.

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



  If the message failed, correct the issue and send the message again. Contact Omtool if you are unable to resolve the issue.

  If the journal states that Omtool server delivered the message but it still has not arrived at its destination, this indicates that the Omtool server transferred the message to the Litigation Support connector for Summation successfully. Do some advanced troubleshooting on the Summation Load Files folders to determine why the message is not being delivered to its destination. Contact Omtool if you are unable to resolve the issue.

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

Continue to Troubleshooting the multifunction device.

Troubleshooting the multifunction device

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

Continue to Troubleshooting the client.

Troubleshooting the client

If the device is working properly, try sending a message from the client to a recipient other than the Litigation Support connector for Summation. If you are able to send messages to recipients other than the Litigation Support connector for Summation and the Litigation Support connector for Summation is operating correctly, contact Omtool.

Routing sheets do not display Summation destination

Problem: When you create a routing sheet with **Summation** as a recipient type, the routing sheet does not have the destination displayed.

Solution: The solution is to add the following variables `%PLUGIN_DESTINATION.1%` and `%PLUGIN_DESTINATION.2%`. These variables should be added to the following template files:

- `BatchRoutingSheet.doc`
- `BatchRoutingSheet-Simple.OMTPL`
- `RoutingSheet-Simple.omtpl`
- `Routingsheet.doc`

The template files are located in the `C:\Program Files\omtool\Omtool Server\Languages\ENU\EmbeddedDirectives` directory of the system running the AccuRoute server.