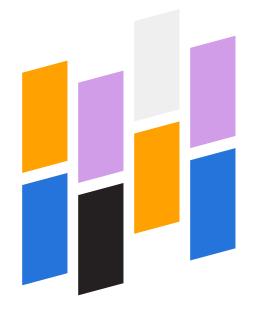


CT Summation

Installation and Integration Guide



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- E-mail: <u>sales@omtool.com</u>

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Contents

Section I: 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 (I-I)

Release notes (I-I)

Related AccuRoute 4.0 documentation (I-2)

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: <u>http://support.summation.com/public/tutorials/TT_012_Loading_Images_DII_File.htm</u>.

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.

Section I: Introduction

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 <u>AccuRoute v4.0</u> 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: <u>http://support.summation.com/public/tutorials/TT_012_Loading_Images_DII_File.htm</u>.

Section 2: Requirements

This section includes:

Server requirements (2-1) Client requirements (2-5) Supported Summation versions (2-5)

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.

- I 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.

- I 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.





Manual Licensing Portal

Enter your activation co	de and select the Exported Activation File made using the Server Administrator.
Activation Code:	
	 Activate License Deactitvate License
Exported Activation File:	Browse
	NEXT >

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

Section 2: Requirements

12 Click NEXT and the Activation Successful message is displayed.

🥻 Activation Completed - Windows Internet Explorer		
🚱 💿 💌 😰 https://license.omtool.com/AccuRoute/Home/Activate	💽 🔒 😔 🗲 🔀 Bing	₽ •
🖕 Favorites 🛛 🚔 🔁 Suggested Sites 👻 🙋 Web Slice Gallery 👻		
C Activation Completed	🟠 🔹 🔂 🗾 🚔 👻 Page 🔹	Safety 🕶 Tools 👻 🔞 🕶
AccuRoute	om	tool
Manual Licensing Portal		
Activation Successful		
To complete this activation download the Activation File and use the System	Administrator to import that file.	
Done	Sinternet Protected Mode: Off	🖓 🔹 🔍 100% 🔹 🎢

- 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.

2-4

Client requirements

The client requirements are:

AccuRoute Desktop v4.0. For more information, see <u>Reinstalling AccuRoute Desktop on all client</u>.

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 2: Requirements

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Section 3: Installation

This section includes:

Downloading the Litigation Connector for AccuRoute v4.0 (3-1) Special instructions for clustered servers (3-1) Applying the Litigation Connector for AccuRoute v4.0 (3-2) Adding the Litigation Support connector to the AccuRoute server (3-3) Reinstalling AccuRoute Desktop on all client systems (3-6)

Downloading the Litigation Connector for AccuRoute v4.0

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

To download the Litigation Connector for AccuRoute v4.0:

- I 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:

- I 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 <u>Applying the Litigation Connector for AccuRoute</u> <u>v4.0</u>.
- 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 <u>Applying the Litigation Connector for AccuRoute</u> <u>v4.0</u>.
- 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:

- I 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.

🕎 Omtoo	I LSS Update 🔀
\square	Click continue to extract and install the Litigation Support Connector Update.
	<u>Continue</u> <u>E</u> xit

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

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

AccuRoute-Litigation Connector Update	×I	
Install AccuRoute-Litigation Connector Update This installs the Litigation Connector Update .		
This update copies the required files for Litigation Connector Update.		
< <u>Back</u> Cancel		

3-2

Section 3: Installation

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

AccuRoute-Litigation Connector Update		
Detect Components The listed items have been detected and will be updated.		
The following componer Accurate Accurate Accurate Accurate		
	< Back Next > Cancel	

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.

AccuRoute-Litigation Connector Update	×
Update completed successfully.	
< Back Finish Cancel	

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.

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To add the Litigation Support connector for Summation:

- I 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 <u>omtool sales</u>.

4 Click Next. The Server Address page opens.

Create New Litigation Connector	×
Server Address Enter the name of the computer where the connector is installed.	
Server Address:	
< <u>B</u> ack <u>N</u> ext > Cancel	

5 Click Next. The Display Name page opens.

Create New Litigation Connector	×
Display Name Enter a friendly name for the connector.	
Name: Summation	
	< <u>B</u> ack Next > Cancel

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

Create New Litigatio	n Connector		×
Litigation Suppo Litigation Supp			Call.
omtool	Choose the Litigation Sup Ringtail Concordance Summation	oport System type:	Y
		< <u>B</u> ack <u>N</u> e	xt > Cancel



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

Create New Litigation	n Connector	×
Congratulations! You have comp	pleted the configuration.	ŚY.
Ο	Click Finish to create the Connector. Click Back to change the settings. Click Cancel to exit.	
omtool	Litigation Connector Running on the Server	
	< Back Finish	Cancel

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 (4-1)

Configuring the Sequencer component (4-2)

Configuring registered users (4-3)

Pre-configuring Summation cases directory structure

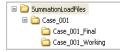
Create a directory structure for the case load files. After creating the directory structure, set sharing and security permissions on each folder.

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:

- I 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.

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- 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:

- I Start Omtool Server Administrator.
- 2 Click **Components** in the console tree, and double-click the **Sequencer** component in the details pane.

Properties for Sequencer	×
General Configuration Journal	
Sequencer Component that sequences multiple jobs in order.	
Ingtances: 👔 🚎 (1 Maximum)	
OK Cancel Hei	>

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.

Properties for Sequencer	×
General Configuration Journal	
Configure sequencing on each connector installed on the Omtool server:	
Connector	
Printer	
Summation	
SMTP on the Server	
Telco SMTP on the Server	
J	
OK Cancel Help	

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:

- I 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.

Section 4: Required Configurations

Properties for User		×
General AccuRoute	Approval FaxCenter Web Clier	nt
☑ Override default Acc ☑ Enable use of the		
Allow user to route to		
Туре	Connector	▲ <u>C</u> onfigure
TRIM	TRIM	
Summation	Summation	
Printer		<u> </u>
Options		
. Allow u <u>n</u> restric	ted access to all Embedded Direct nenticated access to server	ives on the server
Open/Save: Owne	, Destination, Document Format er, Title, Created, Last Used, Single ex	Use, Configu <u>r</u> e
<pre>Prompts Prompts </pre>		Properties
Billing		
☐ V <u>a</u> lidate/Look	kup via:	7
	OK Cance	l Help

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 (5-1) Adding custom user-defined fields to the Litigation Support System connector (optional) (5-4) Modifying custom user-defined fields in the Litigation Support System connector for Summation (5-6)

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:

- I 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.

Properties for Summation	x
General Cases Journal	
Litigation Support Connector	
Processes messages routed to various litigation support systems.	
Name: Summation	
License: 0000-018J-SMPV-Y239	
Ins <u>t</u> ances: 1 (1 Maximum)	
Enable Connector	
Manage Connector Profile:	
Genifax	
OK Cancel Help	

Section 5: Configuring Cases

3 Click the **Cases** tab.

Properties for Summ	ation		×
General Cases Jo	urnal		
Case	Folder		<u>N</u> ew
			Delete
			Properties
		Coursel	
	OK	Cancel	Help

4 Click New. The Case Properties page opens.

Case Properties	x
Summation Coding Fields	
Case name:	1
	-
_ Folders	
Working folder:	
Einal folder for load files:	
Final folder for image and OCR text files:	
	-
Field and file name formats	
Load file name: %CASENAME%.dii	
Image file name: %CASENAME%-%DOCNUM%-%PAGE	
OCR text file name: %CASENAME%-%DOCNUM%.txt	
Document number width: 3	
Allow end user to change document number width	
CCR Options	
☐ <u>G</u> enerate OCR text ☐ Allow end user <u>c</u> hange	
OK	Cancel

- 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.

5-2

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

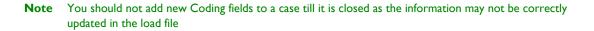
More on the Field and file name formats section

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.



To add a custom user-defined field:

- I 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.

Properties for Summation	×
General Cases Journal	
Litigation Support Connector Processes messages routed to various litigation support systems.	
Name: Summation	
License: 0000-018J-SMPV-Y239	
Instances: 1 📑 (1 Maximum)	
✓ Enable Connector	
Manage Connector Profile:	_
OK Cancel Help	

- 3 Click the **Cases** tab.
- 4 Click New. The Case Properties page opens.
- 5 Configure the case as needed.

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6 Click the Coding Fields tab.

se Propert	ies		
Summation	Coding Fields		
Custom	Fields		Celete Broperties
		 ОК	Cancel

7 Click Add. The Field Properties page opens.

Field Properties		×
<u>N</u> ame:		
Display Name:		1
<u>T</u> ype:	STRING]
Choices: (seperate with commas)		1
Options		1
✓ Visible		
☐ <u>R</u> equired		
Allow user to er	nter new values in picklist	
	OK Cancel	

- 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
- II 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:

- I 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.

Cas	e Properties		×
S	ummation Coding Fields		1
	Custom Fields		<u>A</u> dd
	Title		Delete
	Description		
	Document Type		Properties
	Type of Litigation		
	Department Code		^ V
	Active Case?		
	Trial Date	12/11/2006	
	Attorney		
'			

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

Field Properties		×
<u>N</u> ame:		
Display Name:		
<u>Т</u> уре:	STRING	•
<u>C</u> hoices: (seperate with commas)		
Options		
✓ Visible		
□ <u>R</u> equired		
🗖 Allow user to enti	er new values in picklist	
	OK	Cancel

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

Section 5: Configuring Cases

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Section 6: Testing

This section includes:

Sending a message to Summation from Accuroute Desktop (6-1) Sending an End of Load file using AccuRoute Desktop (6-7)

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 <u>AccuRoute Desktop installation guide</u>.

To send a message using AccuRoute Desktop:

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

🔿 Untitled - Ad	ccuRoute Desktop	
<u>File E</u> dit <u>V</u> iew	<u>T</u> ools <u>H</u> elp	
🗋 🗋 <u>N</u> ew 🛛 🞑	Open ED	🖓 Brint R.S 🖼 Send 😫 Options 🔓 Preview 🥝
Recipients —		TI III
Туре	Format:	Press Add to profile document
E-mail Fax	TIFF (Image)	
Printer		Add E-mail copy to jane@yourcompany.com
Summation		
TRIM		
Туре	Destination	Document Format
		×
🔲 <u>B</u> illing		20
Content		
S <u>u</u> bject:		
Co <u>m</u> ments:		A 1997
Attachment <u>s</u> :	Submitted document(s) here	0
		×
	jane@yourcompa	ny.com HIBISCUS

- 2 Select Summation in the Recipients list.
- 3 Verify that TIFF (image) is selected as the file format.

Section 6: Testing

Summation Confi	guration Wizard	×
Case Specify the	case and type of operation to perform.	
<u>C</u> ase Name:	Case001	
	Store <u>D</u> ocument	
	C End of Load file	
	< Back. Next > Cancel	

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.

Summation Configu	iration Wizard	×
Options Specify the fo	llowing document options.	
- Document Naming		_
Starting Number:	0	
<u>₩</u> idth:	3	
Prefix:	(example: 001)	
- Document Storage	Options	
	Generate OCR text	
	< <u>B</u> ack <u>N</u> ext > Cancel	

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.

6-2

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.

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

10 ClicK Next. The custom fields page opens.

Summation Configuration Wi	zard	×
Coding Fields Specify the following doct mandatory items are mark	ument coding fields, ed with an asterisk.	
Custom Fields		
Title		
*Description		
* = required		
	< <u>B</u> ack <u>Next></u> C	ancel

II 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	

Section 6: Testing

Section 6: Testing

6-4

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.

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

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.

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	🔳 December, 2006 🕨
	Sun Mon Tue Wed Thu Fri Sa
	26 27 28 29 30 1 2
	3456789
	10 11 🥢 13 14 15 16
	17 18 19 20 21 22 23
	24 25 26 27 28 29 30
= required	31 1 2 3 4 5 6
	C Today: 12/12/2006

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.

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	
	Smith Jones Wells White

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

Summation Configuration Wizard	×
Summary Summary of values selected are shown below. Verify them. Press Finish to complete, Back to return to previous screens to edit values.	
Case Name: Case001 Options: Document Separator Starting Document Number: 3	<u>^</u>
Generate DCR Text: True Title: Description: Employee Info	
	V
< <u>B</u> ack Finish	Cancel

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

OUntitled - AccuRo	ute Desktop			
<u>File E</u> dit <u>V</u> iew <u>T</u> oo	is <u>H</u> elp			
] ∐ New 🗳 Oper	n ED 🛛 🚽 Save ED 🕴 🔔 Vie <u>w</u> RS	🛃 Print RS 🔰 🖼	lSend 📔 🕄 Options 📗 🕻	Preview 🛛 🥝
Recipients				\$
Туре	Format:	Press Add to prof	ile docume <u>n</u> t	
E-mail Fax	TIFF (Image)			
Printer		Add	🔲 E-maiļ copy to jane0	⊇yourcompany.com
Summation				
TRIM				
		_		
Туре	Destination		Document Format	😭
U Summation	\\Hibiscus\C	ase 001 \Final	TIFF (Image)	
				×
E Biling				20
Content				
Subject:				
Comments:				<u>~</u> 493
Attachments: 📷 s				
Attachiment <u>s</u> .	ubmitted document(s) here			0
				×
				4.1
	iane@vourcompa	DV COM	HIBISCUS	

- 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**.

File Edit View Tools Help Image: Super ED Save ED View RS Send Options Preview Image: Super Edit End	OUntitled - AccuRoute DesktopX			
Recipients Format: Press Add to profile document Image: I	<u>File E</u> dit <u>V</u> iew	<u>T</u> ools <u>H</u> elp		
Type Format: Press Add to profile documengt Image: Constant of the profile documengt Fraid Fraid TIFF (Image) Image: Constant of the profile documengt Summation Trime Add E-mail copy to jane@yourcompany.com Summation Trime Add E-mail copy to jane@yourcompany.com Type Destination Document Format Image: Constant of the profile document format Type Destination VHibiscust/Case 001/Final TIFF (Image) Summation VHibiscust/Case 001/Final TIFF (Image) Content Subject: Employee info Cogments: Contains data pertaining to full time company employees: Image: Contains data pertaining to full time company employees: Attachments: Submitted document(s) here Image: Contains document(s) here		Open ED 🚽 Save ED 🛛 🛄 View RS 🥞 Print RS 🛛 🖃 Send 📄 Options 🛛 🚱, Preview 🥥		
E-mail TIFF (Image) Image: Summation Fax Printer Add E-mail copy to jane@yourcompany.com Summation TIFF Image: Summation TIFF (Image) Type Destination Document Format Image: Summation Within the summation \VHibiscus\Case 001\Final TIFF (Image) Image: Summation VHibiscus\Case 001\Final TIFF (Image) <td></td> <td></td> <td></td>				
Fax Add E-mail copy to jane@yourcompany.com Pinter Summation TRIM TRIM Destination Document Format Usummation VHibiscusVCase 001VFinal TIFF (Image) X Image: Summation Image: Summation Summation VHibiscusVCase 001VFinal TIFF (Image) X Image: Summation Image: Summation Attachments: Employee info Image: Summatic of full time company employees: Summatic of the summation of the summatic of the s				
Printer Add E-mail copy to jane@yourcompany.com Summation TRIM Type Destination Summation \\Hibiscus\Case 001\Final Support Employee info Content Imployee info Comments: Contains data pertaining to full time company employees: Attachments: Submitted document(s) here Imployee(nto.sts) Imployee(nto.sts)		TIFF (Image)		
TRIM Type Destination Summation VHibiscus/Case 001/Final TIFF (Image) X Image: Summation Content Subject: Employee info Cogments: Contains data pertaining to full time company employees: Attachments: Submitted document(s) here EmployeeInfo.xts		Add E-mail copy to jane@yourcompany.com	1	
Type Destination Ummation VHibiscus/Case 001/Final TIFF (Image) Image: Subject Employee info Content Subject Contains data pertaining to full time company employees. Attachments: Subject document(s) here EmployeeInfo.xls				
Summation VHibiscus\Case 001\Final TIFF (Image) Summation VHibiscus\Case 001\Final TIFF (Image) Attachments: Subject: Employee info Comments: Contains data pertaining to full time company employees. Attachments: Submitted document(s) here Employee(nfo.xts	TRIM			
Summation VHibiscus\Case 001\Final TIFF (Image) Summation VHibiscus\Case 001\Final TIFF (Image) Attachments: Subject: Employee info Comments: Contains data pertaining to full time company employees. Attachments: Submitted document(s) here Employee(nfo.xts				
	Туре	Destination Document Format	<u>ि</u>	
	🔋 📔 Summation	\\Hibiscus\Case 001\Final TIFF (Image)		
Content Subject: Employee info Comments: Contains data pertaining to full time company employees Attachments: Submitted document(s) here EmployeeInfo.xts				
Content Subject: Employee info Comments: Contains data pertaining to full time company employees Attachments: Submitted document(s) here EmployeeInfo.xts				
Content Subject: Employee info Comments: Contains data pertaining to full time company employees Attachments: Submitted document(s) here Employee(nfo.x)s			1	
Content Subject: Employee info Comments: Contains data pertaining to full time company employees Attachments: Submitted document(s) here Employee(nfo.x)s				
Subject: Employee info Comments: Contains data pertaining to full time company employees. Attachments: Submitted document(s) here			<u>, E N</u>	
Comments: Contains data pertaining to full time company employees.	Content			
Attachments: Dubmitted document(s) here 원 문mployeeInfo.xts	S <u>u</u> bject:	mployee info		
EmployeeInto de	Comments:	ontains data pertaining to full time company employees.	480	
EmployeeInto de			<u> </u>	
EmployeeInto de		-		
	- 1		Ū	
		EmployeeInfo.xls	$\overline{\mathbf{v}}$	
			\sim	
jane@yourcompany.com HIBISCUS		jane@yourcompany.com HIBISCUS		

- 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.

AccuRou	AccuRoute Desktop		
(į)	The message was sent to the server	r.	
	OK]		

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

- I 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.

Summation Configuration Wizard		
Case Specify the	case and type of operation to perform.	
<u>C</u> ase Name:	Case001	
	C Store <u>D</u> ocument	
	< Back Next > Cancel	

- 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.

Summation Configur	ation Wizard			×
	ues selected are shown l complete, Back to return		to edit values.	
Case Name: Case001 Options: End of Load	TE .			A
		< <u>B</u> ack	Finish	Cancel

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:

Section 6: Testing

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.

	cuRoute Desktop	
	cuRoute Desktop	
	∑open ED 🛃 Save ED 🛄 View_RS ⊴gPrint RS I 🖃 Send I 🗈 Options 💭 Preview 🎯	
Recipients		
Туре	Format: Press Add to profile document	
E-mail	TIFF (Image)	
Fax	Add E-mail copy to jane@yourcompany.com	
Printer Summation		
TBIM		
Туре	Destination Document Format 🔗	
📔 🔋 Summatio	n TIFF (Image)	
	E DI	
🗖 <u>B</u> illing	<u>88</u>	
Content		
S <u>u</u> bject:	Employee info	
Co <u>m</u> ments:	Contains data pertaining to full time company employees. 🗾 🤷	
Attachments: C Cubmitted document(c) here		
Attachments:	Submitted document(s) here	
	EmployeeInfo.xls	
,	iane@yourcompany.com HIBISCUS	

- 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:

Detecting workflow issues (7-1) Troubleshooting the delivery mechanism (7-1) Troubleshooting the message on the Omtool server (7-1) Troubleshooting the multifunction device (7-3) Troubleshooting the client (7-3) Routing sheets do not display Summation destination (7-4)

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:

- 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.

View: Items submitted this week		-
	All Items Items submitted today Items submitted yesterday Items submitted this week Items submitted this month	he

- 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.

Recipient Properties				
ſ	General Attachments Re	cipient Sender Confirmations Journal		
	Date 10/05/2005 09:32:57 AM 10/05/2005 09:32:57 AM 10/05/2005 09:32:57 AM	Journal Entry Dispatch: Fax number normalized to +16038901 Dispatch: Matched rule All fax numbers to Telco Dispatch: Processing action for rule "All fax num		
	10/05/2005 09:32:58 AM 10/05/2005 09:32:58 AM	Compose: Started Compose: (localhost - localhost) Document=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.
 - 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.

R	Recipient Properties					
General Attachments Recipient Sender Confirmations Journal						
	Date	Journal Entry				
	10/05/2005 09:32:57 AM 10/05/2005 09:32:57 AM 10/05/2005 09:32:57 AM 10/05/2005 09:32:58 AM 10/05/2005 09:32:58 AM 10/05/2005 09:33:20 AM 10/05/2005 09:33:21 AM 10/05/2005 09:33:22 AM 10/05/2005 09:33:22 AM	Dispatch: Matched rule All fax numbers to Telco Dispatch: Processing action for rule "All fax num Compose: Started Compose: (localhost - localhost) Document=cert Compose: (localhost - localhost) Document=400 Compose: Completed OmtoolConnector: Destination connector failed t Dispatch: Fax number normalized to +16038901				

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 <code>%PLUGIN_DESTINATION.1%</code> and <code>%PLUGIN_DESTINATION.2%</code>. 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.