

# Omtool DMS Libraries v2.1 SharePoint Configuration Guide

*For AccuRoute and Genifax*

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# Chapter 1: SharePoint

**Note:** SharePoint functionality is available only with the SharePoint integration for AccuRoute v2.1. You can download this integration at <http://www.omtool.com/support/>.

## Introduction

Microsoft SharePoint 2003 is supported with the DMS Libraries v2.1. SharePoint is a shared document repository.

## Server requirements

The system where you install the SharePoint integration must meet the following minimum requirements:

- AccuRoute v2.1
- Tier 2 DMS connector license
- SharePoint update must be installed on all servers

## SharePoint

- Permissions to access a Microsoft SharePoint 2003 portal

## Adding the SharePoint connector

To add the SharePoint connector to an AccuRoute server:

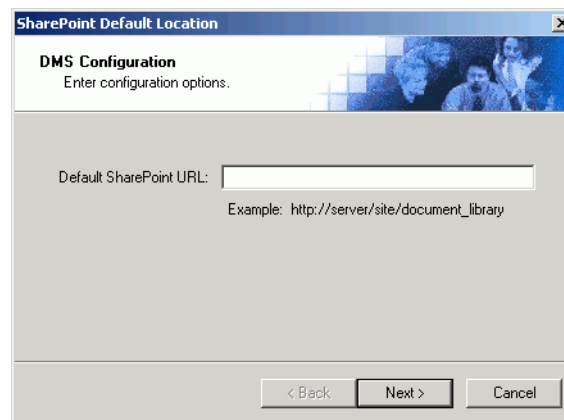
1. Start the Administrator.
2. Right-click **Connectors** in the console tree and select **New | DMS**. The *License* screen appears.
3. Type the license key for the SharePoint connector in the *License* text box and click **Next**. The *Display Name* screen appears.
4. Type a friendly name for this connector in the *Name* text box and click **Next**. the *DMS Type* screen appears.
5. Select **T2 - SharePoint** from the drop-down list and click **Next**. The *Congratulations* screen appears.
6. Click **Finish**.

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

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

## Completing the SharePoint connector Configuration Wizard

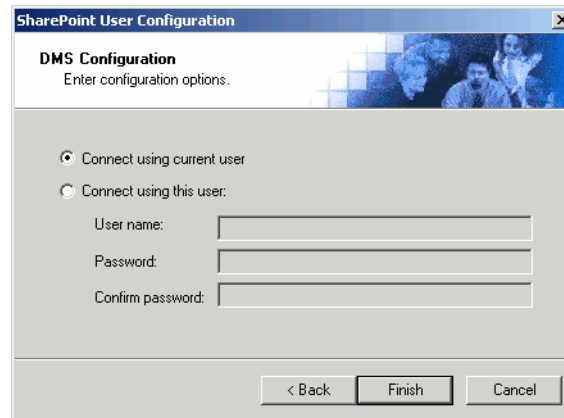
The SharePoint Default Location screen appears immediately after you complete the new connector wizard.



The screenshot shows a window titled "SharePoint Default Location" with a close button in the top right corner. The window content includes a header "DMS Configuration" with the instruction "Enter configuration options." Below this is a text input field labeled "Default SharePoint URL:" with an example URL "http://server/site/document\_library" provided underneath. At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel".

To complete the configuration wizard for SharePoint:

1. Click **Next**. The *SharePoint User Configuration* screen appears.



2. Select an authentication method:

- Select **Connect using current user** to connect to SharePoint using the login credentials of the current Windows user. (This setting is recommended for single-user workstations.)
- Select **Connect using this user** to connect to SharePoint using specific login credentials, and type the user name and password in the *User name*, *Password*, and *Confirm password* text boxes.

**Note:** If you are configuring the DMS connector on the AccuRoute server, Omtool strongly recommends that you configure the AccuRoute server with the login credentials of Windows user account that has Windows sharing and security permissions to read and write to SharePoint. In rare circumstances, when the AccuRoute server cannot obtain the Windows login credentials of the AccuRoute Desktop or AccuRoute Client user, the server uses these login credentials. This reduces the possibility of an authentication failure.

3. Click **Finish**.

After you complete the DMS configuration wizard, the SharePoint connector appears in the *Connectors* details pane.

## Enhancements and resolved issues in this release

This release of the Omtool DMS Libraries SharePoint integration includes the following enhancements:

- *Enhancement:* SharePoint 2003 is now supported.

## Release Notes

This section contains release notes and troubleshooting tips that are specific to the Omtool DMS Libraries.

**Tip: The Omtool Knowledge Base contains resolutions and informational articles on technical issues. To access the knowledge base, go to <http://www.omtool.com/support/index.cfm> and log in. (If you cannot log in or do not know your login number, contact Omtool Customer Service using the telephone number provided.) Click Knowledge Base in the navigation pane. Search the knowledge base using an article number or keyword.**

### *Acrobat PDF icon does not display when importing to SharePoint*

When you import a PDF document into SharePoint, the Acrobat PDF icon does not display.

Microsoft did not include a PDF icon with SharePoint.

To add the icon, place the PDF icon named "icpdf.gif" into C:\Program Files\Common Files\Microsoft Shared\web server extensions\60\TEMPLATE\IMAGES, or wherever this directory is on your server. You can do the same with any other file type that does not have an icon.

In addition to placing the icpdf.gif in the ...TEMPLATE\IMAGES directory, you also need to map the extension to the icon in ...TEMPLATE\XML\docicon.xml by adding the map for pdf. Please see the Microsoft Knowledge Base Article on the ByExtension Element for steps on performing this mapping located at [http://msdn.microsoft.com/library/default.asp?url=/library/en-us/spsdk/1/CAML\\_Schema/spxml/ByExtension.asp](http://msdn.microsoft.com/library/default.asp?url=/library/en-us/spsdk/1/CAML_Schema/spxml/ByExtension.asp).

### *FaxCenter supports only one DMS application*

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

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

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

### *Never open, edit, or delete a placeholder in a DMS application*

When an AccuRoute Desktop or AccuRoute Client user creates a routing sheet for a document that should be routed to your company's DMS application, the Omtool DMS Libraries invoke the DMS application and creates a placeholder for the document. When the AccuRoute server routes the actual document to the DMS application, the DMS application overwrites the placeholder with the actual document. Never open, edit, or delete this placeholder.

### *Do not install Infoceptor on a system with the Omtool DMS Libraries*

Do not install Infoceptor on a system where you plan to install the Omtool DMS Libraries. Infoceptor, an optional component of the DM or PowerDOCS client installation, is not supported with the Omtool DMS Libraries.

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# Chapter 2: Enabling SharePoint for Registered Users

If you have added support for SharePoint and you want to make it available to users as a routing destination in the AccuRoute Desktop or AccuRoute Client, you must modify the AccuRoute properties of registered users.

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

To enable SharePoint a routing destination in the AccuRoute Desktop or AccuRoute Client:

1. Start the Administrator.
2. Do one of the following:
  - *To modify user defaults:* Right-click **Registered Users** in the console tree and select **User Defaults**.
  - *To modify the AccuRoute properties of a registered user:* Click **Registered Users** in the console tree and double-click the appropriate user record in the details pane.
3. Click the **AccuRoute** tab.
4. Locate the *Allow user to route to* list and select **SharePoint**.

**Important!** On the AccuRoute Server Administrator, you must not select **Billing** as a “Route to” type on the **AccuRoute** tab in the **Registered Users** properties for **User Defaults** or individual users.

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

SharePoint becomes available in new instances of the AccuRoute Desktop or AccuRoute Client.



# Chapter 3: Configuring Final Forms

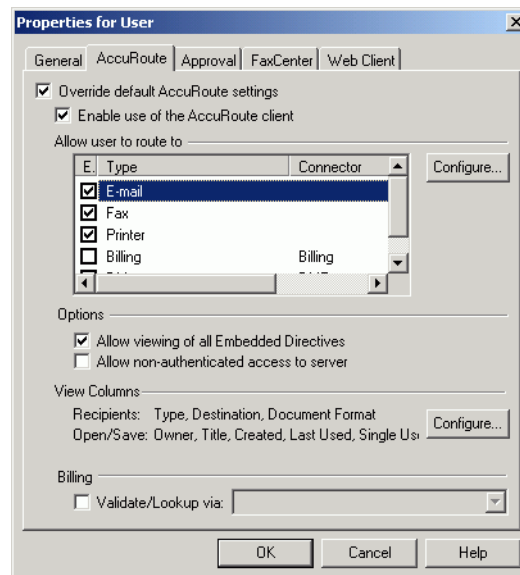
**Important!** This option is only available in AccuRoute Desktop.

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

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

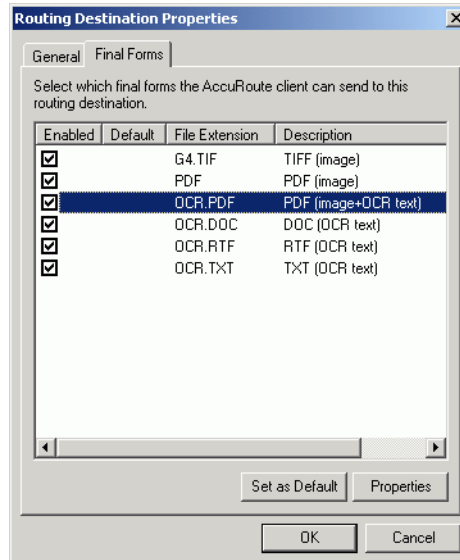
To change the label of a document type:

1. Click **Registered Users** in the console tree and double-click an individual user in the details pane, or right-click **Registered Users** and select **User Defaults**.
2. Click the **AccuRoute** tab.
3. Highlight an item in the *Allow user to route to* list.



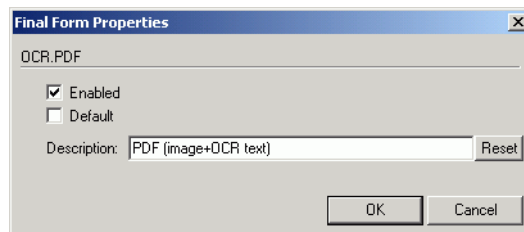
4. Click **Configure** and click the **Final Forms** tab.

5. Highlight the document type you wish to modify.



6. Click **Properties**.

7. Enter the new label you wish to appear for this document type in the *Description* field.



8. Click **OK** to close the Final Form Properties.

9. Click **OK** to close the Routing Destination Properties.

10. Click **OK** to close the Properties for the User.

Repeat the above steps for every document type you want to change the label for.

# Chapter 4: Configuring Clients

**Note:** SharePoint functionality is available only with the SharePoint integration for AccuRoute v2.1. You can download this integration at <http://www.omtool.com/support/>.

## Client requirements

The system where you install the SharePoint integration must meet the following minimum requirements:

- AccuRoute Desktop v2.1 or AccuRoute Client v2.01.11
- FaxCenter v3.4
- SharePoint Update must be installed on each client workstation

## SharePoint

- Permissions to access a Microsoft SharePoint 2003 portal

## Configuring AccuRoute Desktop

To add SharePoint functionality to the AccuRoute Desktop:

1. Start AccuRoute Desktop and log in.
2. Click **Tools** on the menu bar and select **Configure DMS**.
3. Select **SharePoint** from the menu that appears. The *SharePoint Default Location* screen appears.
4. At this point, the configuration is identical to that connector configuration. Perform steps one through three in the "Completing the SharePoint connector Configuration Wizard" on page 2.

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## Configuring AccuRoute Client

To add SharePoint functionality to the AccuRoute Client:

1. Start the AccuRoute Client and log in.
2. Click **Tools** on the menu bar and select **Configure SharePoint**. The *SharePoint Default Location* screen appears.
3. At this point, the configuration is identical to that connector configuration. Perform steps one through three in the "Completing the SharePoint connector Configuration Wizard" on page 2.

## Configuring FaxCenter

To add SharePoint functionality to FaxCenter:

1. Start FaxCenter and log in.
2. Click **Tools** on the menu bar and select **Configure DMS**. The *Document Management Configuration* screen appears.
3. Select **SharePoint** and click **Configure**. The *SharePoint Default Location* screen appears.
4. At this point, the configuration is identical to that connector configuration. Perform steps one through two in the "Completing the SharePoint connector Configuration Wizard" on page 2.
5. Click **OK** on the *Document Management Configuration* screen.

## Client deployment methods

To deploy clients to individual workstations with SharePoint functionality:

- Install either AccuRoute Desktop or AccuRoute Client on each individual workstation and perform the configuration steps for SharePoint manually.

# Chapter 5: Configuring Billing

If you wish to use billing when profiling your SharePoint message, you must enable billing on the SharePoint connector, and then enable it for Registered Users.

## Enabling billing on the connector

The first step in using billing is to enable it on the SharePoint connector.

To enable Billing on the SharePoint connector:

1. Start the Administrator.
2. Click **Connectors** in the console tree, and double-click your **SharePoint** connector.
3. Click the **Advanced** tab.
4. From the *Billing* drop-down list, select either **Billing Selectable** or **Billing Mandatory**.
5. Click **OK** to save your changes.

## Enabling Billing for Registered Users

After you enable Billing on the SharePoint connector, you need to allow Billing for the default Registered User and any individual Registered Users.

To enable Billing for Registered Users:

1. Do one of the following:
  - *To modify user defaults:* Right-click **Registered Users** in the console tree and select **User Defaults**.
  - *To modify the AccuRoute properties of a registered user:* Click **Registered Users** in the console tree and double-click the appropriate user record in the details pane.
2. Click the **AccuRoute** tab.
3. Select the **Validate/Lookup via** check box, and select the **SharePoint** connector from the drop-down list.
4. Click **OK** to save your changes.

Billing Entry is now available in new instances of the AccuRoute Desktop or AccuRoute Client.

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## Automatic Billing Entry

The Automatic Billing Entry functionality automatically inserts billing information from the message profile window. This functionality is available only with:

- AccuRoute server v2.1
- AccuRoute Desktop v2.1

If you want to make Automatic Billing Entry available in the AccuRoute Desktop, you must modify the AccuRoute properties of Registered Users. A DMS that supports billing must be installed and configured, and billing must be enabled before you can use the Automatic Billing Entry functionality.

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