# Sending a message to Concordance from Accuroute Desktop

To test the installation and configuration of the Litigation Support connector, send a message using AccuRoute Desktop. For detailed information on sending messages using AccuRoute Desktop, consult the <u>AccuRoute Desktop user guide</u>.

## To send a message using AccuRoute Desktop:

Start AccuRoute Desktop. Log in if prompted.

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Recipients Type		Format:	Press Add to pr	rofile document
Concordance	•	TIFF (image)		
E-mail	~			
Fax Printer			Add	E-mail copy to idoe@engineering.omtool.com
Туре		Destinatio	n	Document Format
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Attachments:	Submitted of	document(s) here		Ú
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- 2 Select the destination type **CONCORDANCE** in the **RECIPIENTS TYPE** list.
- 3 Verify that the only available file format is TIFF (image).
- 4 Click ADD. The Concordance Configuration Wizard opens.



5 From the **CASE NAME** drop down, select a case.

6 Click NEXT. The Options page opens.

Document Naming				
Starting Number:	1			
<u>₩</u> idth:	3	-		
Prefix:	ConCase		(example: ConCa	se001)
Document Storage	Options			

7 In the **STARTING NUMBER** text box enter a 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.

- 8 In the **WIDTH** drop down select the document width.
- 9 In the PREFIX text box, enter a prefix. The Prefix can consist of alpha characters, numerical characters, or a mixture. The limits of this field are controlled by the file system

The Prefix and number fields are added to the file name during the Compose process. For example if the Prefix is ABCDE and the Width is set to five, the resulting file name will be ABCDE00001.tif. The starting number (in this example 00001) indicates the first individual file number of the single page files.

10 Optionally, in the Document Storage Options area, if the option is available, select GENERATE OCR TEXT (optional). 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

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## Continued: Sending a message to Concordance using AccuRoute Desktop

files are created, and the document is not searchable within Concordance.

- II Click **NEXT**. The Coding Fields page opens.
- 12 Enter information for any custom user-defined fields. If a field is required, 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	
Type of Litigation	Personal injury
Department Code	
Active Case?	
Trial Date	11/29/2006
Attorney	

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

Custom Fields	
Type of Litigation	Personal injury
Department Code	250
Active Case?	
Trial Date	11/29/2006
Attorney	

**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	
Type of Litigation	Personal injury
Department Code	250
Active Case?	<b>v</b>
Trial Date	11/29/2006
Attorney	

**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							
Type of Litigation	Persor	Personal injury					
Department Code	250	250					
Active Case?							
Trial Date	11/29	/2006			-		
Attorney	•	November, 2006				5	Þ
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	29	30	31	1	2	3	4
	5	6	7	8	9	10	11
	12	13	14	15	16	17	18
	19	20	21	22	23	24	25
	26	27	28	<u>79</u>	30	1	2
	3	4	5	6	7	8	9
				1/29/			

**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.

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Custom Fields	
Type of Litigation	Personal injury
Department Code	250
Active Case?	
Trial Date	11/29/2006
Attorney	•
	B. Jones C. Smith D. Green E. Brown

13 Click NEXT. A summary page opens listing all the information you have entered in the wizard.

Concordance Configuration Wizard		×
Summary		
Summary of values selected are shown b Press Finish to complete, Back to return t	elow. Verify them. o previous screens to edit values.	
Case Name: Case001 Options: Document Separator		<u> </u>
Starting Document Number: 3 Generate OCR Text: True		
Name: EmployeeData		
- J		
		-
1		
	< Back Finish	Cancel

14 Click FINISH to close the wizard. The Concordance destination appears in the message.

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Attachments: Submitted document(s	s) here	0
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## Continued: Sending a message to Concordance using AccuRoute Desktop

- 15 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. Type the address of the web document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML), and click **OK**.

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Attachment <u>s</u> :	Submitted document(s)	nere				0
	EmployeeInfo.xls					
						×
	ia	ne@vourcompany.com	H	HBISCUS		

#### **16** Do any of the following:

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

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

**Print a Routing Sheet that can be scanned with hard copy documents** - Save the message as an Embedded Directive. Then click **PRINT 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.) 3

When you select End of Load file, you cannot click Send to send the message. Send 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, 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 MDB format) is generates in the **Working** folder.

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