

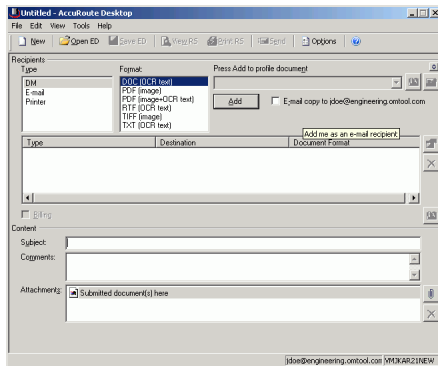
Sending a message to Open Text Document Management, eDOCS Edition (eDOCS DM) using AccuRoute Desktop

For detailed information on sending messages using AccuRoute Desktop, consult the user guide located at:

<http://www.omtool.com/documentation/Accuroute/v22/AccurouteDesktop/AccuRouteDesktopV22UserGuide.pdf>

To send a message to Open Text Document Management, eDOCS Edition (eDOCS DM) using AccuRoute Desktop:

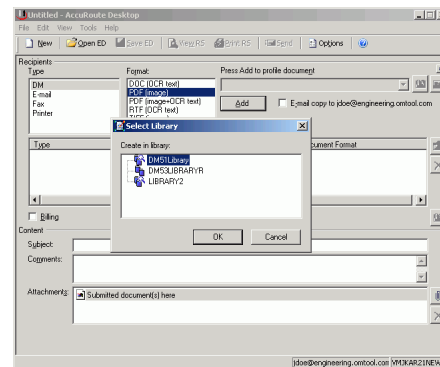
- 1 Start AccuRoute Desktop. Click **START**, go to the Omtool programs group, and select **ACCURROUTE DESKTOP**. Log in if prompted. The application appears on your desktop.



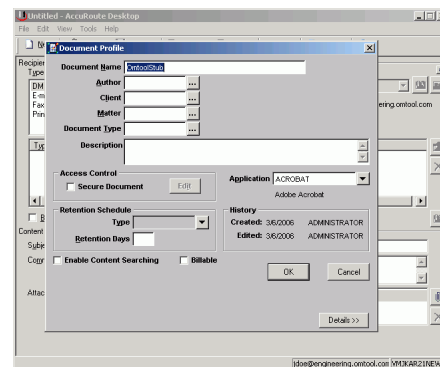
- 2 Select the destination type **DM** in the **RECIPIENTS TYPE** list and select a file format for your message in the **FORMAT** list.

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

- 3 Click **ADD**. The Select Library window appears.

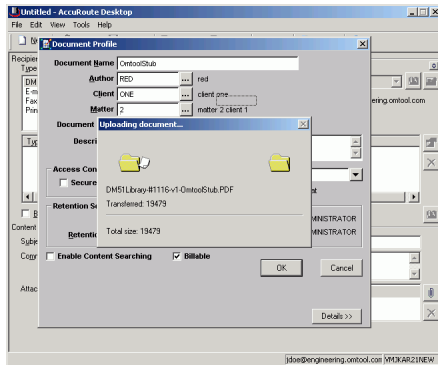


- 4 Select the appropriate DM library and click **OK**. The Document Profile window appears.

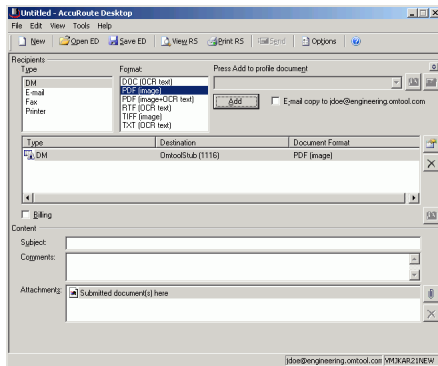


For information on using billing, consult the AccuRoute Desktop User Guide or your system administrator.

- 5 Complete the Document Profile window and click **OK**. The Uploading document window appears.



When the upload is complete, an OmtoolStub destination appears in the message.



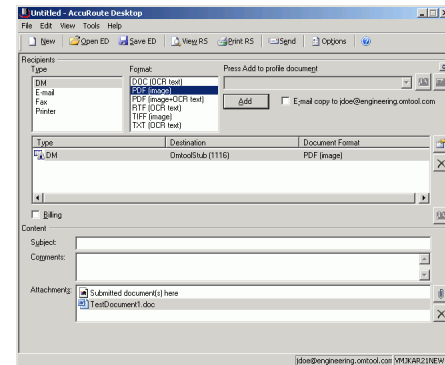
► When you create a Routing Sheet for Open Text Document Management, eDOCS Edition (eDOCS DM), AccuRoute creates a placeholder for the document. Never open, edit, or delete this placeholder.

- 6 Add content to your message.
- Locate the **CONTENT** section at the bottom and type a subject and comments.
 - 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 page document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML), and click **OK**.



- 7 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.)