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:

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

🗋 Kew 🛛 🖉	Tools Help Open ED M Save ED	Neg R5	🕼 grint R.S. Tail Send 🔝 Options 🌚
ecipients Type	Format:		Press Add to profile document
DM E-mail Printer	PDF (mag PDF (mag PDF (mag RTF (DCF TIFF (mag TXT (DCF	ge) ge+OCR text) R text) gel	Add Famil copy to jdoe@engineering.comboil.com
Туре		Destination	Document Format
141			1.1
Eling			
E Billing			
E Billing]		

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.

Untitled - AccuRoute De				×
File Edit View Tools Help				
📄 New 🛛 🗳 Open ED	Seve ED Keyz RS	Brint RS IBIS	iend 📄 Options 📗 🥹	
Recipients Type	Format:	Press Add to profile	e document	٥
DM	DOC (DCR text)		~	93 m
E-mail	PDF (image) PDF (image+0CR text)	<u> </u>		
Fax Printer	RTF (DCR text)	Add	E;mail copy to jdoe@engineering.omto:	al.com
	Select Library		×	
Туре	Create in library:		sument Format	- F
	DM51Lbray DM53LBRARYR LIBRARY2			×
•				•
E Billing	1			93
Content		OK Cano	я	
Subject				
Comments:				*
				Ψ
Attachmerks: Submitter	d document(s) here			• ×
			jdoe@engineering.cmtool.com	R21NEW

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

	led - AccuRoute Desktop t Wew Tools Hep	<u>.</u> . ×
0.00	Document Profile	4
Recipier Type DM E-m Fax Prin	Document Hane Transition	ering omtaal.com
Tys	Document Type Description Access Control Facess Control	
Content Sybje	Adde Acrobet Retention Schedule Tgre Tgre getention Bays Created: 36,0006 ADMINISTRATOR Edited: 38,0008 ADMINISTRATOR	
Cogyr Altac	Finable Content Searching Filiable OK Cancel	×
	jdoe®engineering.conto	ol.com (MUKAR2INEW

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

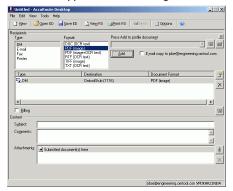
© 2010 by Omtool, Ltd. All rights reserved.

Continued: Sending a message to eDOCS Edition (eDOCS DM) using AccuRoute Desktop

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

	ed - AccuRoute Des	top	_
File Edit	Wew Tools Help		
0.00	🔮 Document Profile		4
Recipier Type	Document Name		٥
DM	Author	RED red	- 10 m
E-m Fax	Client	ONE client pre	ering.omtool.com
Prin	Matter	2 motter 2 client 1	chig child a com
	Document Uplo	ading document	
Tys	Descri		
	Access Con		×
	C Secure	51Library-#1116-v1-OmtoolStub.PDF	
I I □ B	Retention St Tr	notemed: 19479	
Content Subje	<u>R</u> etentic To	al size: 19479 MINISTRATOR MINISTRATOR	
Comr	Enable Content	Searching 🔽 Billable OK. Cancel	×
Altac			
		Details>>	×
		jdoe@engineering.omto	ol.com WMJKAR21NEW

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.
 - 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**.

	ccuRoute Desktop	×
File Edit View	Tools Help	
🗋 New 🛛	🖗 Qpen ED 🛛 🛃 Save ED 🛛 🛄 We <u>w</u> RS 🕞 Brint	RS 🖃 Send 🖆 Options 😟
Recipients Type DM E-mail Fax Printer	Format: Piess A DOC (DCR text) POF (imoge) POF (imoge) RTF (DCR text) TIFF (image)	add to prolife document
Type C DM	TXT (DDR text) Destination OmtoolStub (1116)	Document Format
Eantent Sybject		<u></u>
Comments: Attachments	n Submitted document(s) here 편] TestDocument1.doc	× ×
	,	idee@ecolegering.control.com/WWWA921/JFW

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.)

Omtool, Ltd. • 6 Riverside Drive, Andover, MA 01810 • http://www.omtool.com Omtool Europe • 25 Southampton Buildings, London WC2A IAL United Kingdom

© 2010 by Omtool, Ltd. All rights reserved.