Sending a message to Autonomy iManage WorkSite using AccuRoute Desktop and the Standard Profile Dialog

4

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 Autonomy iManage WorkSite 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.

🗋 New 🖂		e ED 📗 🖪 Wey RS 🛛 🖉		or 1 manual 1	~	
Туре	Fog	nat: Ej	gter e-mail address			1
E-mail Printer WorkSite	PD PD BT	C (OCR text) F (mage) F (mage+OCR text) F (OCR text) F (mage) T (OCR text)	Add 🔽	E;mail copy to jdoe@	engineering omtool.c	
Туре		Destination		Document Format		1
Type	กัว:	Destination Custom1	<u></u>	Document Format		
.∢[⊡ <u>B</u> illing A	iño:		[)	
Eiling A	ทักร)	

2 Select the destination type **WORKSITE** 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 New Profile window appears.

New Profile	Californi - Province (2)
Tere Prese choise the location and document properties Fine Description Fine Description Fine Description Fine Description MarketQuestinanaeeE112 Select Class Cla	Otte Propulsion Top Oracle Annual Control of Control
🔀 WorkSite	Save Cancel Help

Enter any required fields.

Recipien	New Profile	X	
Туре	Please choose the location and document properties	Other Properties Type	3
E-mr	Description	ACROBAT (Adobe Acrobat Re	10 ja
Print Wor	OmtoolStub	Custom3	com
	Location		
	MANDB Select +	Custom29	
Тур	Author	Custom30	Εđ
	ADMINISTRATOR		
	Class	Custom4	2
	DDC <document></document>		
•	Custom1	Operator	F
Γ Bi	_		Ea
ontent	Custom2	Security Modify	
Subie	_	Secury -Modity	H I
Comm	Comments	Shared as: Public 💌	
_			E .
Attaci			Ľ_
Allact			
	🔁 WorkSite	Save Cancel Help	

5 Complete any optional information if desired and click SAVE. An OmtoolStub destination appears in the message.

Untitled - AccuRoute		>
File Edit View Tools	Help > 🛃 Save ED 🛕 View RS 🍕 Brint RS	fail Send 📄 Options 📔 🥹
Recipients Type E-mail Printer WorkSite	Format: Press Add to DDC (UCR text) PDF (moop) FDF (moop) FDF (moop) FDF (moop) FDF (moop) FDF (FOR text) TXT (DCR text)	profile document
Туре	Destination	Document Format
WorkSite Img Author Content Sybject	OnicodStub (2183)	PDF (mage+DCR text)
Cogments: Attachmentg: Attachmentg	uited document(s) here	Ust of attachments
		idee@engineering.ontool.com/MIKAR2INEW

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

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

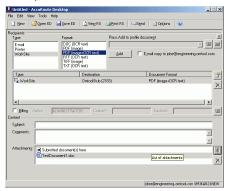
© 2010 by Omtool, Ltd. All rights reserved.

Continued: Sending a message to WorkSite using the Standard Profile Dialog

- 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**.



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

> 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.

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.) 2