

The following procedure demonstrates the use of the AccuRoute Extensions for OpenText DM options to:

- ▶ **Create New Routing Sheet** - Create a Routing Sheet from within your OpenText DM document library. You can use the Routing Sheet to scan hardcopy documents from any scan enabled device. The documents are submitted to the AccuRoute server for processing and routing to the DM repository according to the Routing Sheet instructions.
- ▶ **Create Scan Reservation** - Create a DM placeholder. When a Personal Distribution is selected from the device, the document scans to that placeholder.
- ▶ **Open in Web Client** - Submit an electronic document directly from the DM client to the server.

- 1 Open DM.
- 2 Go to the document library into which you will route your document.

- 3 Import a scanned document in one of three ways:

▶ **From a folder - Import Scan**

- a Right-click on a folder. Select **Folder** and then **Import Scan**.
- b Verify or enter profile information.
- c Click **Save**.

If you are using the AccuRoute Desktop, a Routing Sheet is created that will import documents based on the profile selected.

If you are using the Web Client, select an option on the Client Options page. Refer to the section titled, *Client Options*, at the end of this procedure.

▶ **From a document - Send to AccuRoute Extensions for DM**

- a In a folder, right-click on a document name.
- b Select **Send to AccuRoute Extensions for DM**. AccuRoute Desktop or Web Client opens with the document attached.
- c Use AccuRoute Desktop or Web Client to send the message.

▶ **From a document - Import Scanned Document with Copied Profile**

- a In a folder, right-click on a document name.
- b Select **Import Scanned Document with Copied Profile**.
- c Verify or enter profile information.

d Click **Save**.

If you are using the AccuRoute Desktop, a Routing Sheet is created that will import documents based on the profile selected.

If you are using the Web Client, select an option on the Client Options page. Refer to the section titled, *Client Options*, at the end of this procedure.

## Client Options

The following options are provided on the **Client Options** page:

▶ **Create New Routing Sheet**

A Routing Sheet generated with the destination information from the profile opens in your default PDF viewer. Print the Routing Sheet and use it for scanning hardcopy documents. Optionally, save it for later use.

▶ **Create Scan Reservation**

AccuRoute creates instructions with destination information from the profile, and displays a message when the scan reservation is created.

Use the **Personal Distributions** option on the device display panel to scan your hardcopy documents. Or, use the AccuRoute Desktop or Web Client to scan electronic documents and send them to DM for storage.

▶ **Open in Web Client**

The AccuRoute Web Client opens with the New Distribution screen. The Destination section is filled with recipient information from the profile. Create the message by attaching an electronic document(s). Select other recipients, as necessary. Then, save the job as a new distribution, or send the message to the AccuRoute server for processing.