# AccuRoute<sup>®</sup> Embedded Device Client Quick Start Guide

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# omtool

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# Using the Routing Sheet Option

A Routing Sheet is a special page with a barcode containing distribution instructions for your document.

With the **Routing Sheet** option, the device delivers the scanned document and Routing Sheet to the AccuRoute server, which decodes the barcode and distributes the document to intended recipients.

- I Generate and print a Routing Sheet using the Omtool Client.
- 2 Assemble your document with the Routing Sheet at the front.
- 3 At the device, load the document into the feeder or place it on the exposure glass. (Use the exposure glass only if scanning a single page.)
- 4 Press **Routing Sheet**. (If this option is not visible, find it using the scroll bar.)
  - Some devices allow access to the buttons after selecting the Apps icon or a top level button.



• Note: The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

If **one touch scan** is enabled, document scanning starts. Go to Step 7.

If **one touch scan** is NOT enabled (the default), the device shows the **Ready** message. Continue with the next step.

- 5 Optionally, press More Options to change scan settings (such as parameters for control over document routing and formatting).
- 6 Press **Start** to begin scanning. A progress indicator will display.
- 7 Wait for the job to finish. (Alternatively, press Cancel Job to stop the scan job.)

When transfer is complete, a message indicates the job status.

8 To scan another document using the **Routing Sheet** option, press **Back**.

To end the session and return to the main AccuRoute menu, press  $\frown$  or the **OK** button.

# Using the Public Distributions Option

A system administrator creates **Public Distributions** for use by a group. For example, all members of the marketing group may have a distribution predefined specifically for their use.

Using the **Public Distributions** option, the device delivers the document to the AccuRoute server, which decodes the distribution and sends the document to intended recipients.

- Assemble your document and go to the device.
- 2 Press **Public Distributions**. (If this option is not visible, find it using the scroll bar.)
  - Some devices allow access to the buttons after selecting the Apps icon or a top level button.
- 🚺 Start Copy Ready Copies Sign In Routing Sheet al Distributi 2 3 Distribute a document using a Distribute document using a personal distribution routing sheet ublic Distributi To Me -9 R Distribute document using a public Scan document to my desktop distribution
  - Note: The device button icons may vary, but the steps remain consistent.
- 3 Select a distribution from the list of **Public Distributions**.

- 4 Load the document into the document feeder or place it on the exposure glass. (Use the exposure glass only if scanning a single page.)
- 5 Optionally, press More Options to change scan settings (such as parameters for control over document routing and formatting).
- 6 Press **Start** to begin scanning. A progress indicator will display.
- 7 Wait for the job to finish. (Alternatively, press **Cancel Job** to stop the scan job.)

When transfer is complete, a message indicates the job status.

8 To scan another document using the same distribution, press **Back**.

To end the session and return to the main AccuRoute menu, press  $\bigcap$  or  $\mathbf{OK}.$ 

### Using the Personal Distributions Option

**Personal Distributions** are created for use by an individual. For example, you may have a distribution defined for sending information to people within your company and another distribution for sending information outside the company. (Before using this option, you must create a Personal Distribution. Ask your system administrator for assistance.)

Using the **Personal Distributions** option, the device delivers the document to the AccuRoute server, which decodes the distribution and sends the document to intended recipients.

- Assemble your document and go to the device.
- 2 Press **Personal Distributions**. (If this option is not visible, find it using the scroll bar.)
  - Some devices allow access to the buttons after selecting the Apps icon or a top level button.



• Note: The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

- 3 If prompted, enter user login information to access your **Personal Distributions**.
- 4 Select a distribution from the list of your **Personal Distributions**.

- 5 Load the document into the document feeder or place it on the exposure glass. (Use the exposure glass only if scanning a single page.)
- 6 Optionally, press More Options to change scan settings (such as parameters for control over document routing and formatting).
- 7 Press **Start** to begin scanning. A progress indicator will display.
- 8 Wait for the job to finish. (Alternatively, press **Cancel Job** to stop the scan job.)

When transfer is complete, a message indicates the job status.

9 To scan another document using the same distribution, press **Back**.

To end the session and return to the main AccuRoute menu, press  $\ref{eq:result}$  or OK.

### Using the Scan to Me Option

The **Scan to Me** option scans a document and delivers it to your PC for further review and routing. Based on a directive (a rule defined by a system administrator), AccuRoute sends the document to your e-mail address (the default) or to a Windows home folder.

Using the **Scan to Me** option, the device delivers the document to the AccuRoute server, which processes it using your personal directive and sends the document to intended recipients.

- Assemble your document and go to the device.
- 2 Press Scan to Me. (If this option is not visible, find it using the scroll bar.)
  - Some devices allow access to the buttons after selecting the Apps icon or a top level button.



• Note: The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

- 3 If prompted, enter user login information to access the **Scan to Me** option.
- 4 Press Next.

- 5 Load the document into the document feeder or place it on the exposure glass. (Use the exposure glass only if scanning a single page.)
- Optionally, press More Options to change scan settings (such as parameters for control over document routing and formatting).
- 7 Press **Start** to begin scanning. A progress indicator will display.
- 8 Wait for the job to finish. (Alternatively, press **Cancel Job** to stop the scan job.)

When transfer is complete, a message indicates the job status.

9 To scan another document using the **Scan to Me** option, press **Back**.

To end the session and return to the main AccuRoute menu, press or  $\mathbf{OK}$ .

# Using the Fax Option

When you enter a fax number and scan your document using the **Fax** option, the device delivers the document to the AccuRoute server, which sends the fax to intended recipients.

- Assemble your document and go to the device.
- 2 Press Fax. (If you do not see this option, find it using the scroll bar.)
  - Some devices allow access to the buttons after selecting the Apps icon or a top level button.



- Note: The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.
- 3 Press the Fax Number text box and enter the destination fax number using the keypad that opens. Press OK to close the keypad.

 If you do not enter a fax number, you will get an error message.

4 To fax without adding a cover sheet, be sure the Add Cover Sheet option is not checked. Then, press Next. Continue with Step 5.

To add a cover sheet, press the **Add Cover Sheet** check box. Enter information in the **Sender Name**,

**Recipient Name**, and **Subject** text boxes. Then, press **Next**.

- 5 Load the document into the document feeder or place it on the exposure glass. (Use the exposure glass only if scanning a single page.)
- 6 Optionally, press More Options to change scan settings (such as parameters for control over document routing and formatting).
- 7 Press **Start** to begin scanning. A progress indicator will display.
- 8 Wait for the job to finish. (Alternatively, press **Cancel Job** to stop the scan job.)

When transfer is complete, a message indicates the job status.

9 To scan another document using the **Fax** option, press **Back**.

To end the session and return to the main AccuRoute menu, press  $\bigcap$  or **OK**.

#### Using the Fax Release Option

Using the Fax Release option, the device delivers the document to the AccuRoute server, which can hold or print your faxes as necessary.

#### Step I: Log in to the HP MFP device with your PIN

- Assemble your document and go to the device.
- 2 Press Fax Release. (If you do not see this option, find it using the scroll bar.)
  - Some devices allow access to the buttons after selecting the Apps icon or a top level button.

IP Color LaserJet CM3530 MFP   Ready	Black Copies: 🚺 🕐
Supplies Status Check on paper trays and other	Personal Distributions Your Distributions
Check on paper trays and other supplies	Eax-Release or Hold
Set up, customize, and manage this device	Release / Hold printing of faxes
2011-Juli-21 02:58 PM	

Note: The device button icons may vary, but the steps

#### Step 2: Print Pending Jobs

To print faxes:

Select the Print Pending Jobs option.

The device prints all faxes that were in the queue hold for the selected fax number, including those that were received after the normal office business hours.

#### Step 3: Enable or Disable Manual Hold

To enable Manual Hold:

Select the **Enable Manual Hold** option to override the current print schedule assigned to the fax number.

• Use this option if you do not want to print faxes at this time. For example, you can enable Manual Hold when going to a meeting.

remain consistent. The example image is from an HP FutureSmart device

- 3 Select the **Fax Number** to which your fax messages are sent.
- 4 In the Enter PIN page that opens, enter the PIN number assigned to you by the Administrator.
- 5 Select Next. Two options appear: Enable Manual Hold and Print Pending Jobs.
  - To Print Pending Jobs, continue to Step 2.
  - To Enable or Disable Manual Hold, continue to Step 3.

To disable Manual Hold:

Once you enable Manual Hold, the **Release Manual** Hold option appears on the **Fax Release** screen.

To disable Manual Hold, select the **Release Manual Hold** option. The device releases and prints all faxes that were held since Manual Hold was set.

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### Using the Scan to Folder Option

Using the **Scan to Folder** option, the AccuRoute server sends the document to a folder predetermined by your system administrator.

- Assemble your document and go to the device.
- 2 Load the document into the document feeder or place it on the exposure glass. (Use the exposure glass only if scanning a single page.)
- 3 Press Scan to Folder. (If this option is not visible, find it using the scroll bar.)
  - Some devices allow access to the buttons after selecting the Apps icon or a top level button.

	😢 🐼 Start Copy	0 2 2 0
	Sign In Ready	Copies:
	Scan To My Files	Scan To Folder
P	Scan document to My Files folder	Distribute a document to a default folder
	Сору	Fax
U	Make copies from an original document	Send a Fax

Your folder(s) appear on the device panel.

▶ Note: The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

Icons indicate Folder status:

**Right-facing arrow** – The folder has sub-folders. Select the folder and a new list of folders appears for selection.

**Check mark** – The folder has no sub-folders. Select this item to route your scan directly to the folder.

**Red x mark** – The folder is not properly authorized (or an error occurred) and is unavailable until the issue is resolved.

- 4 Select the Folder to which you want to send your document or select Create to create a new Folder destination.
  - If **one touch scan** is enabled, document scanning starts. Go to Step 6.
  - If one touch scan is NOT enabled (the default), the device shows the **Ready to Scan** message. Continue with the next step.
- 5 Optionally, press **More Options** to change scan settings (such as parameters for control over document routing and formatting).
- 6 Press **Start** to begin scanning. A progress indicator will display.
- 7 Wait for the job to finish. (Alternatively, press **Cancel Job** to stop the scan job.)

When transfer is complete, a message indicates the job status.

8 To scan another document to the specified network folder, press **Back**.

To end the session and return to the main AccuRoute menu, press  $\frown$  or the **OK** button.

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## Using the Scan to My Files Option

Using the **Scan to My Files** option, the device delivers the scanned document to the AccuRoute server, which sends it as an electronic file to the "My Files" folder on the Omtool Client.

- Assemble your document and go to the device.
- 2 Press Scan to My Files. (If this option is not visible, find it using the scroll bar.)
  - Some devices allow access to the buttons after selecting the Apps icon or a top level button.



- Note: The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.
- 3 If prompted, enter user login information to access your **My Files** options.
- 4 Load the document into the document feeder or place it on the exposure glass. (Use the exposure glass only if scanning a single page.)

- 5 Optionally, press **More Options** to change scan settings (such as parameters for control over document routing and formatting).
- 6 Press **Start** to begin scanning. A progress indicator will display.
- 7 Wait for the job to finish. (Alternatively, press Cancel Job to stop the scan job.)

When transfer is complete, a message indicates the job status.

8 To scan another document using the same option, press **Back**.

To end the session and return to the main AccuRoute menu, press  $\frown$  or the **OK** button.

# Using the Mobile Reservation Option

Use the **Mobile Reservation** option to distribute a a scanned document using a previously generated Mobile Scan Reservation Code. Mobile Scan Reservation Codes are created on the Mobile Client.

The device uses the **Mobile Scan Reservation Code** to appropriately route your scanned document to the AccuRoute server, which decodes the reservation and distributes the document to intended recipients.

- Assemble your document and go to the device.
- 2 Press **Mobile Reservation**. (If this option is not visible, find it using the scroll bar.)
  - Some devices allow access to the buttons after selecting the Apps icon or a top level button.



• Note: The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

- 3 You are prompted for your Mobile Scan Reservation Code. Enter the code generated by your Mobile Client.
- 4 Load the document into the document feeder or place it on the exposure glass. (Use the exposure glass only if scanning a single page.)

- 5 Optionally, press **More Options** to change scan settings (such as parameters for control over document routing and formatting).
- 6 Press **Start** to begin scanning. A progress indicator will display.
- 7 Wait for the job to finish. (Alternatively, press Cancel Job to stop the scan job.)

When transfer is complete, a message indicates the job status.

8 To scan another document to the specified network folder, press **Back**.

To end the session and return to the main AccuRoute menu, press or the  $\mathbf{OK}$  button.

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#### Using the Device Information Option

The Device Information option provides a screen of detailed information about the multi-function printer (MFP).

- Go to the device.
- 2 Press **Device Information**. (If this option is not visible, find it using the scroll bar.)
  - Some devices allow access to the buttons after selecting the Apps icon or a top level button.



• Note: The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

- 3 The following types of information appear on the display:
  - Device name and model
  - Device host name
  - Device IP address
  - Device serial number
- 4 To end the session and return to the main AccuRoute menu, press or the **OK** button.

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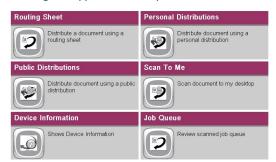
# Using the Job Queue Option

You can use the **Job Queue** option in two ways. **Job Queue** functionality depends on whether or not you are logged in as an authenticated user.

For all users, **Job Queue** queries the Omtool server for a list of items previously scanned on the multi-function printer (MFP). For authenticated users, **Job Queue** also lists any previously scanned items associated with the logged in user.

- Go to the device.
- 2 Press Job Queue. (If this option is not visible, find it using the scroll bar.)

• Some devices allow access to the buttons after selecting the Apps icon or a top level button.



▶ Note: The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

- 3 The following **Job Queue** properties appear on the display:
  - All faxes sent from this device
  - All scanned jobs from this device
- 4 Authenticated users will also see the following **Job Queue** property on the display:
  - All my faxes
- 5 To end the session and return to the main AccuRoute menu, press or the **OK** button.