AccuRoute® Embedded Device Client Quick Start Guide

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omtool™

Omtool support and sales

Online resources

The Omtool web site provides you with 24-hour access to documentation, software updates and other downloads, and detailed technical information that can help you troubleshoot issues. Go to http://www.omtool.com/support and log in using your customer number. Then click one of the following:

- **Knowledge Base** to access technical articles.
- **Downloads & Docs** to access online documentation, software updates, and downloads.

Customer service and technical support

Contact Omtool Customer Service or Technical Support using any of the following methods:

- **Phone**: +1/1 978 327 6800 or +1/1 888 303 8098 (toll-free in the US)
- **Fax**: +1/1 978 659 1301
- **E-mail**: customerservice@omtool.com or support@omtool.com

Technical support requires an active support contract. For more information, go to http://www.omtool.com/support/entitlements.cfm.

Sales, consulting services, licenses, and training

Contact Omtool Sales using any of the following methods:

- **Phone**: +1/1 978 327 5700 or +1/1 800 886 7845 (toll-free in the US)
- **Fax**: +1/1 978 659 1300
- **E-mail**: sales@omtool.com

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.

1   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 🏠 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.

1   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.

  ▸ 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 [home icon] or **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.

1 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 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.

1   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.)

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 **Scan to Me** option, press **Back**.

    To end the session and return to the main AccuRoute menu, press ⌂ or **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.

1 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.
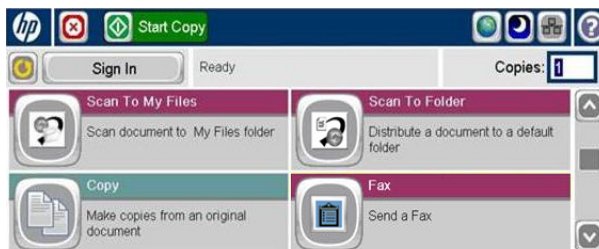
▸ Note: The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

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 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 1: Log in to the HP MFP device with your PIN

1 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.
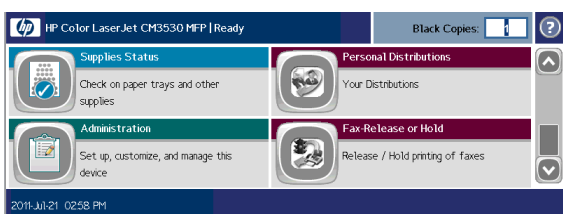
Note: The device button icons may vary, but the steps

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**.

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.
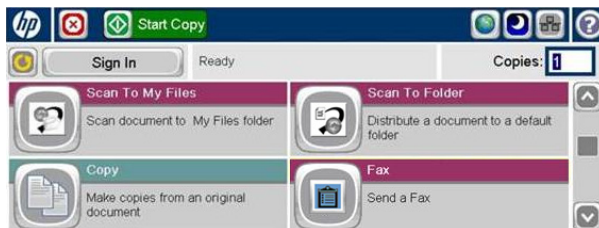
To disable Manual Hold:

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.

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.

1 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.

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 [home icon] or the **OK** button.

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.

1 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 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.

1 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.
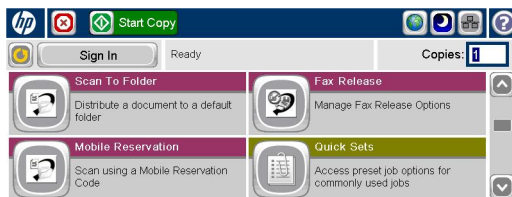
▶ Note: The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

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 **OK** button.

Using the Device Information Option

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

1 Go to the device.

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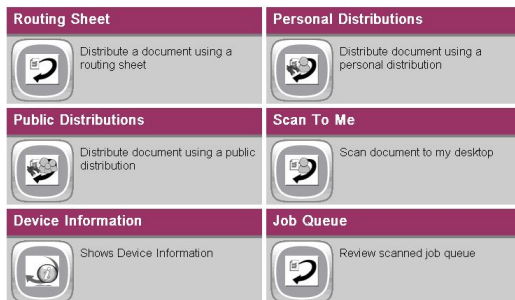 ▶ Some devices allow access to the buttons after selecting the Apps icon or a top level button.

Routing Sheet	Personal Distributions
Distribute a document using a routing sheet	Distribute document using a personal distribution
Public Distributions	**Scan To Me**
Distribute document using a public distribution	Scan document to my desktop
Device Information	**Job Queue**
Shows Device Information	Review scanned job queue

 ▶ 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.
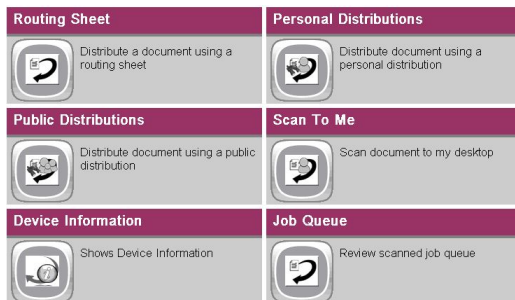
Using the Job Queue Option

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.

1 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.

Routing Sheet	Personal Distributions
Distribute a document using a routing sheet	Distribute document using a personal distribution
Public Distributions	**Scan To Me**
Distribute document using a public distribution	Scan document to my desktop
Device Information	**Job Queue**
Shows Device Information	Review scanned job queue

   ▶ 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.