

---

# Embedded AccuRoute<sup>®</sup> for Ricoh ESA v2.0 Quick Start Guide

March 2014



**Omtool, Ltd.**

6 Riverside Drive  
Andover, MA 01810  
Phone: +1/1 978 327 5700  
Toll-free in the US: +1/1 800 886 7845  
Fax: +1/1 978 659 1300

**Omtool Europe**

25 Southampton Buildings  
London  
WC2A 1AL  
United Kingdom  
Phone: +44/0 20 3043 8580  
Toll-free in the UK: +44/0 80 0011 2981  
Fax: +44/0 20 3043 8581

Web: <http://www.omtool.com>

© 2014 by Omtool, Ltd. All rights reserved. Omtool, AccuRoute and the Company logo are trademarks of the Company. Trade names and trademarks of other companies appearing in this document are the property of their respective owners.

Omtool product documentation is provided as part of the licensed product. As such, the documentation is subject to the terms outlined in the End User License Agreement. (You are presented with the End User License Agreement during the product installation. By installing the product, you consent to the terms therein.)

Permission to use the documentation is granted, provided that this copyright notice appears in all copies, use of the documentation is for informational and non-commercial or personal use only and will not be copied or posted on any network computer or broadcast in any media, and no modifications to the documentation are made. Accredited educational institutions may download and reproduce the documentation for distribution in the classroom. Distribution outside the classroom requires express written permission. Use for any other purpose is expressly prohibited by law.

Omtool and/or its suppliers make no guaranties, express or implied, about the information contained in the documentation. Documents and graphics contained therein could include typographical errors and technical inaccuracies. Omtool may make improvements or changes to the documentation and its associated product at any time.

## 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](mailto:customerservice@omtool.com) or [support@omtool.com](mailto: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:

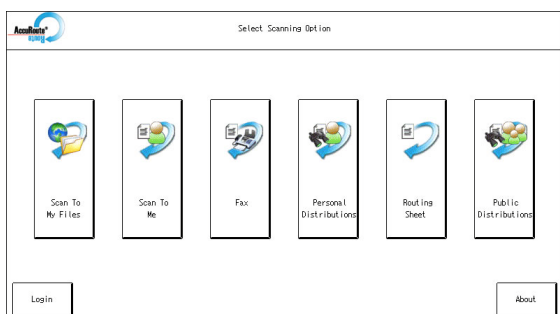
- **Phone:** +1/1 978 327 5700 or +1/1 800 886 7845 (toll-free in the US)
- **Fax:** +1/1 978 659 1300
- **E-mail:** [sales@omtool.com](mailto:sales@omtool.com)

## Using the Routing Sheet Option

A **Routing Sheet** is a special page with Embedded Directive data 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 Embedded Directive data and distributes the document to intended recipients.

- 1 Generate and print a Routing Sheet using AccuRoute Desktop or the AccuRoute Web Client.
- 2 Assemble your document with the Routing Sheet at the front or back. Then go to the device.
- 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**. The device shows the ready to scan page.
  - ▶ Some devices allow access to the buttons after selecting the Apps icon or a top level button.
- 5 Press **Start** on the hard keypad. The device scans the document.
- 6 If job build mode is on (ScanSourceMode is set to SADF in the configuration file or in the Settings screen), you will see a document distribution message with two options:
  - To scan another document using the **Routing Sheet** option, press **Start** to repeat the process.
  - If scanning is complete, press **#**. The device initiates a routing request and a summary message appears on the screen.
- 7 Press **OK** to return to the main AccuRoute page.

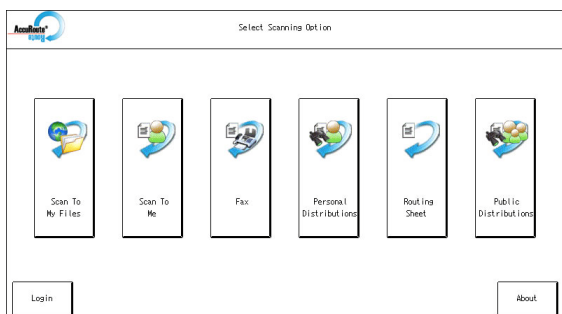


▶ Note: The device button icons may vary, but the steps remain consistent.

## 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 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 **Fax**. The device prompts you to enter details about the fax.
  - ▶ Some devices allow access to the buttons after selecting the Apps icon or a top level button.
- 4 Enter information about the fax:
  - a To enter the fax number, press the **Keyboard** button beside the **Fax Number** text box and enter the number on the keyboard that appears.
  - b To add a cover page, press **Yes**.
    - c To enter the sender name, press the **Keyboard** button beside the **Sender Name** text box and enter the sender name on the keyboard that appears.
    - d To enter the recipient name, press the **Keyboard** button beside the **Recipient Name** text box and enter the recipient name on the keyboard that appears.
    - e To enter the subject, press the **Keyboard** button beside the **Subject** text box and enter an appropriate subject on the keyboard that appears.
- 5 Press **Next**. The device shows a summary of this document distribution option.
- 6 Press **Start** on the hard keyboard. The device scans the document.
- 7 If job build mode is on (ScanSourceMode is set to SADF in the configuration file or in the Settings screen), you will see a document distribution message with two options:
  - To scan additional pages, press **Start** to repeat the process.
  - If scanning is complete, press **#**. The device initiates a routing request and a summary message appears on the screen.
- 8 Press **OK** to return to the main AccuRoute page.



▶ Note: The device button icons may vary, but the steps remain consistent.

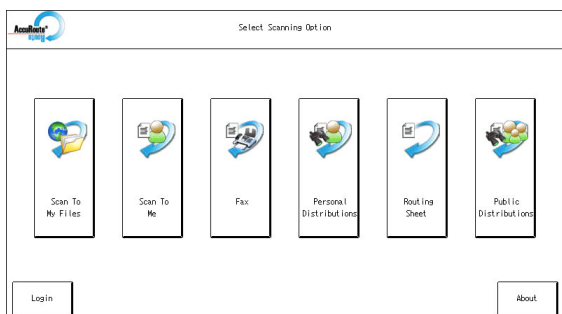
## Using the Personal Distributions Option

The Embedded Directives that you can create on the AccuRoute Desktop are document distribution options called **Personal Distributions**. 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 using either the AccuRoute Desktop or the AccuRoute Web Client. Ask your system administrator for assistance.

With the **Personal Distributions** option, the device delivers the scanned document to the AccuRoute server, which sends the document to the intended recipients.

- 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 **Personal Distributions**. The device prompts you to log in.
  - ▶ Some devices allow access to the buttons after selecting the Apps icon or a top level button.
- 4 Enter your login credentials:
  - Press the **Keyboard** button beside the **Email** text box and enter your email ID on the keyboard that appears.
- 5 Press **OK**. A list of your Personal Distribution options appears.
- 6 Select a **Personal Distribution**. The device shows a summary of this document distribution option.
- 7 Press **Start** on the hard keypad. The device scans the document.
- 8 If job build mode is on (ScanSourceMode is set to SADP in the configuration file or in the Settings screen), you will see a document distribution message with two options:
  - To scan additional pages, press **Start** to repeat the process.
  - If scanning is complete, press **#**. The device initiates a routing request and a summary message appears on the screen.
- 9 Press **OK** to return to the main AccuRoute page.



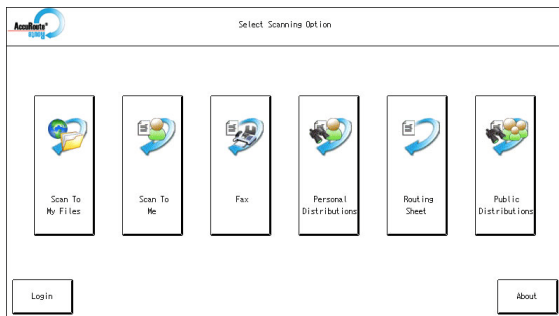
▶ Note: The device button icons may vary, but the steps remain consistent.

## 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 scanned document to the AccuRoute server, which decodes the distribution and sends the document to the intended recipients.

- 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 **Public Distributions**.
  - ▶ Some devices allow access to the buttons after selecting the Apps icon or a top level button
- 4 A list of the **Public Distribution** options appears. Select a distribution from the list. The device shows a summary of this document distribution.
- 5 Press **Start** on the hard keypad. The device scans the document.
- 6 If job build mode is on (ScanSourceMode is set to SADP in the configuration file or in the Settings screen), you will see a document distribution message with two options:
  - To scan additional pages, load the pages and press **Start** to repeat the process.
  - If scanning is complete, press **#**. The device initiates a routing request and a summary message appears on the screen.
- 7 Press **OK** to return to the main AccuRoute page.

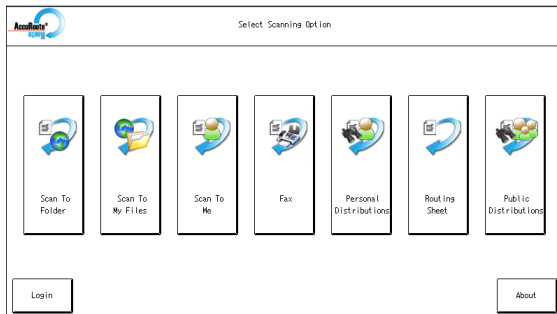


▶ Note: The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

## Using the Scan to Folder Option

Using the **Scan to Folder** option, the AccuRoute server sends the scanned 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** and the ready to scan page will appear.
- 4 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.


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.

- 5 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.
- 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 to the specified network folder, press **Back**.
- 10 To end the session and return to the main AccuRoute menu, press  or the **OK** button.

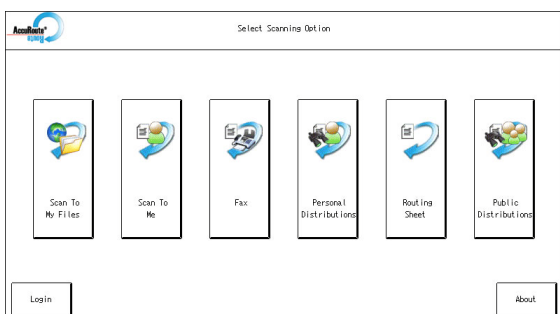
## Using the Scan to Me Option

With the **Scan to Me** option, the AccuRoute server sends the scanned document to your PC for further review and routing. Based on a personal directive (a rule defined by a system administrator), AccuRoute sends the document to your e-mail address (the default), a Windows home folder or other intended recipients.

Before you can use the **Scan to Me** option, you must create your personal directive on the AccuRoute Desktop Client. Consult your network or system administrator for directions on how to set up your directive.

Note that without a **Scan To Me** directive set up, a scanned document is sent to your email address by default.

- 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 Me** and the device prompts you to log in.
  - ▶ 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.

- 4 Enter your login credentials:
  - ▶ Depending on your authentication setup, the login screen and the data you are required to enter may vary.

- Press the **Keyboard** button beside the **Email** text box and enter your email ID on the keyboard that appears.

- Verify that the domain name is correct. If not, press the **Keyboard** button beside the **Domain** text box and modify the domain name.

5 Press **OK**. The device shows a summary page.

6 Press **Start** on the hard keypad. The device scans the document.

7 If job build mode is on (ScanSourceMode is set to SADF in the configuration file or in the Settings screen), you will see a document distribution message with two options:

- To scan additional pages, press **Start** to repeat the process.
- If scanning is complete, press **#**. The device initiates a routing request and a summary message appears on the screen.

8 Press **OK** to return to the main AccuRoute page.



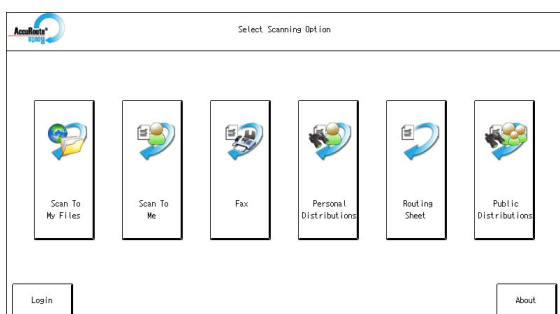
## Using the Scan to My Files Option

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 AccuRoute Desktop Client or AccuRoute Web Client.

- 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 My Files** and the device prompts you to log in.

▶ 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.

- 4 Enter your login credentials:
  - ▶ Depending on your authentication setup, the login screen and the data you are required to enter may vary.

- Press the **Keyboard** button beside the **Email** text box and enter your email ID on the keyboard that appears.

- Verify that the domain name is correct. If not, press the **Keyboard** button beside the **Domain** text box and modify the domain name.

- 5 Press **OK**. The device shows a summary page.

- 6 Press **Start** on the hard keypad. The device scans the document.

- 7 If job build mode is on (ScanSourceMode is set to SADP in the configuration file or in the Settings screen), you will see a document distribution message with two options:

- To scan additional pages, press **Start** to repeat the process.
- If scanning is complete, press **#**. The device initiates a routing request and a summary message appears on the screen.

- 8 Press **OK** to return to the main AccuRoute page.