

HP Capture and Route (HP CR)

User Guide

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Table 1 Revisions

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1 HP CR End User Interface Overview

The HP Capture and Route (HP CR) solution is a software application designed to work with HP multi-function peripherals (MFPs) as an integrated platform to:

- Capture (scan) paper documents, collect document-related metadata, validate information, compress documents, and convert them into digital documents. During conversion, the system processes the document through optical character recognition (OCR) and/or converts to various formats (DOC, JPG, PDF, RTF, TIF, TXT, and XLS), some of which are text-searchable.
- Deliver to specified destinations and archive resulting documents into messaging, content management, and other electronic information systems.

While the image need only be captured once, HP CR enables multiple processing tasks and delivery to a number of destinations based on a single scan. Destinations include your PC desktop, email distribution list, fax number, printer, Microsoft® SharePoint®, or designated network or cloud storage folders.

1-1 Workflow

HP CR offers extensive flexibility. For example, you can scan and distribute documents directly from your PC or work directly from the HP device.

Figure 1-1 Scan and distribute from your PC

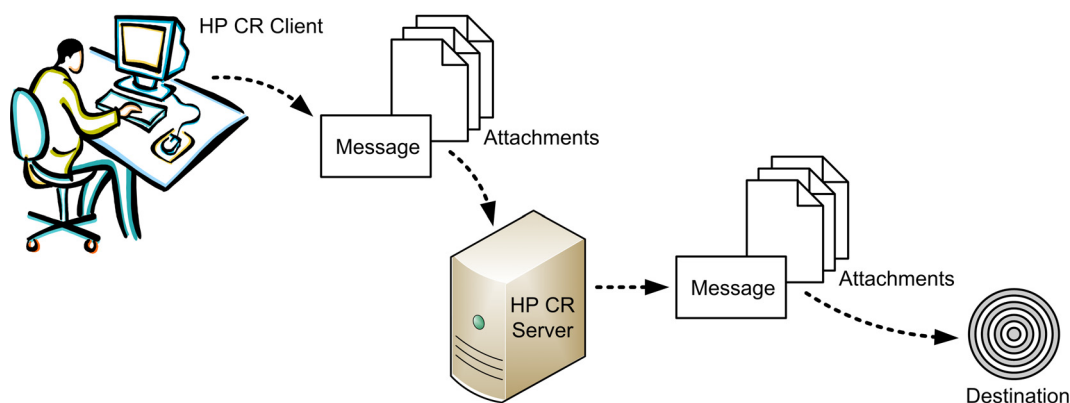
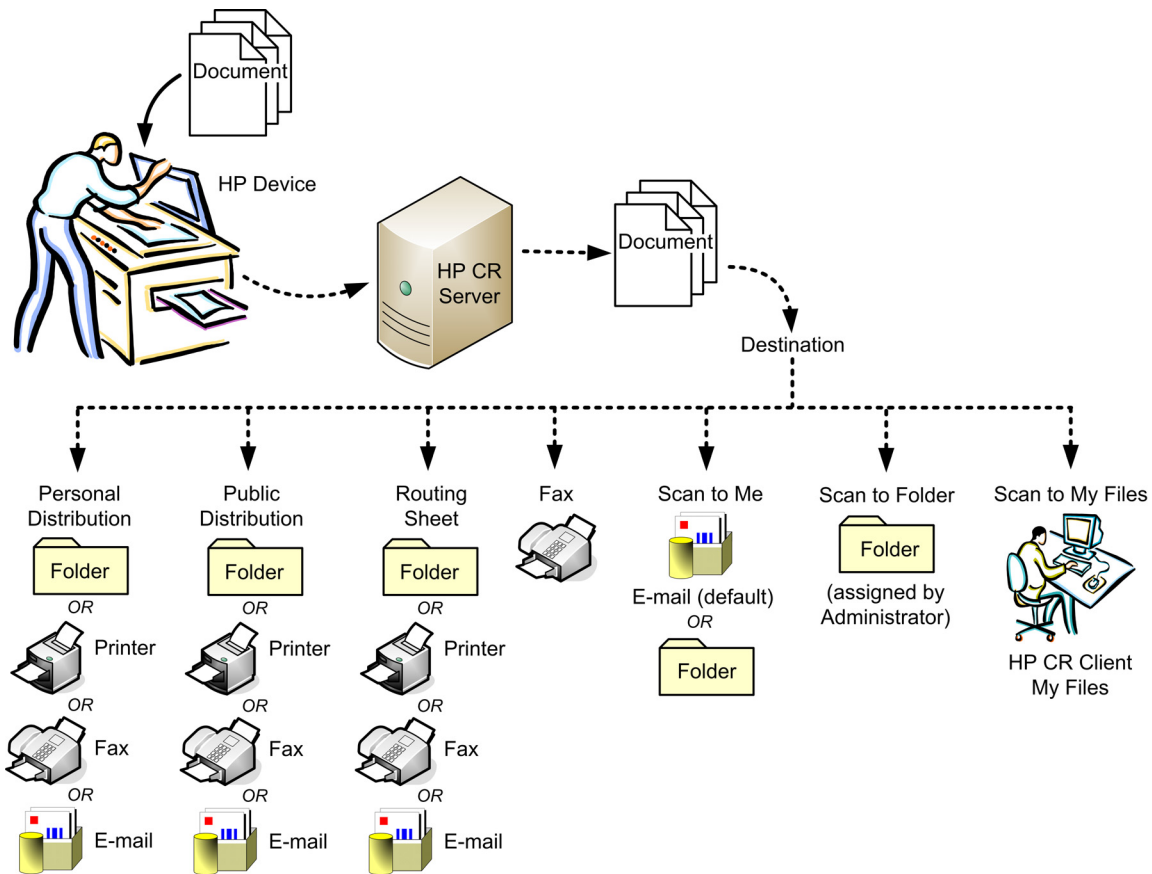


Figure 1-2 Scan and distribute from the device

Another option is to create a distribution list and/or a Routing Sheet on your PC, and then scan documents on the HP device.

1-2 HP CR clients

Five clients are used to access HP CR features:

- **HP CR End User Interface (HP CR Client)** – Use this PC application to conveniently create distributions, directly email/fax electronic documents, access inbound documents, and more. This provides easy access to HP CR features and functions using your intuitive PC interface.
- **HP CR Embedded Device Client** – Use the device client to scan hardcopy documents. The HP CR Embedded Device Client provides scanning options that depend on your device configuration.
- **HP CR for Microsoft SharePoint** – Import hardcopy documents into SharePoint libraries. HP CR converts scanned documents into a text-searchable format (PDF or DOC), and then saves the resulting document into the proper SharePoint library, fully profiled and stored alongside other electronic content.
- **HP CR for Autonomy WorkSite** - Import hardcopy documents into HP Autonomy WorkSite repositories.
- **HP CR Mobile Client** – Capture and distribute documents directly from a mobile device or cloud-based storage to any destination. Also use it to prepare a Mobile Scan Reservation Code for later use at an MFP – inside or outside the business network.

1-3 HP CR Client

The HP CR Client includes a menu bar, options, and a main area in which you will typically see a list of messages, message dialog, or supplementary options dialog.

Figure 1-3 Example of the HP CR Client with a list of messages

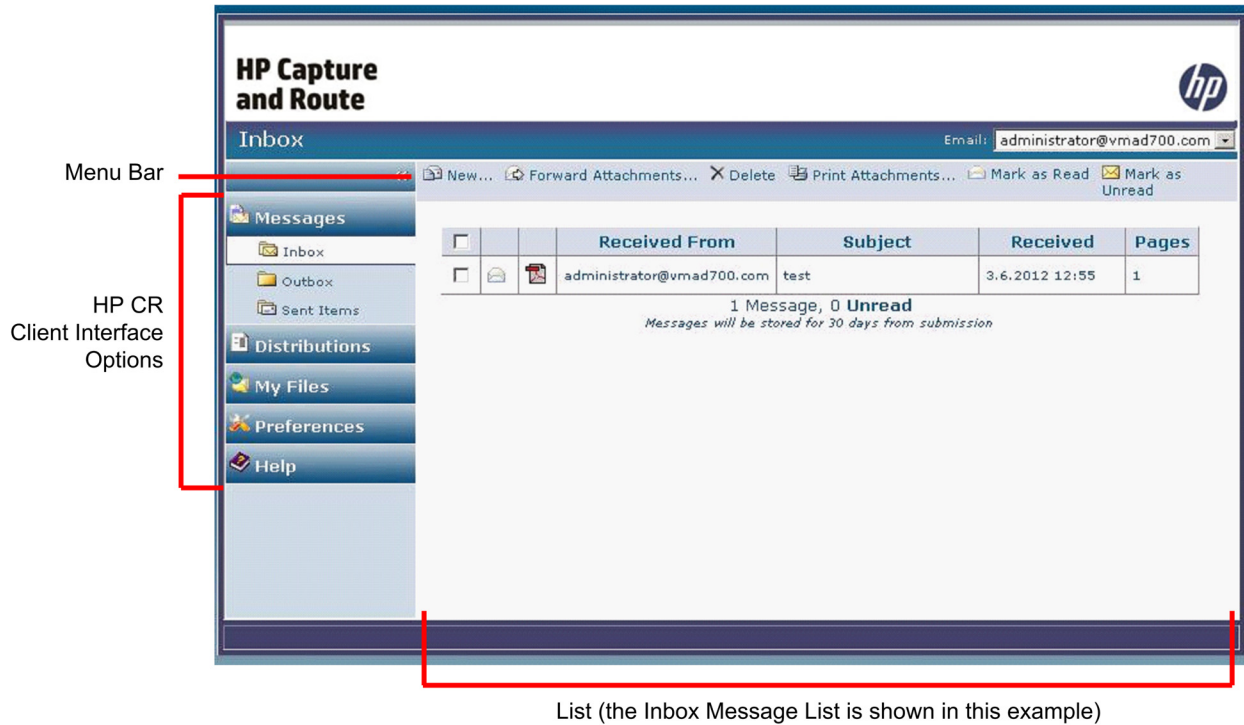
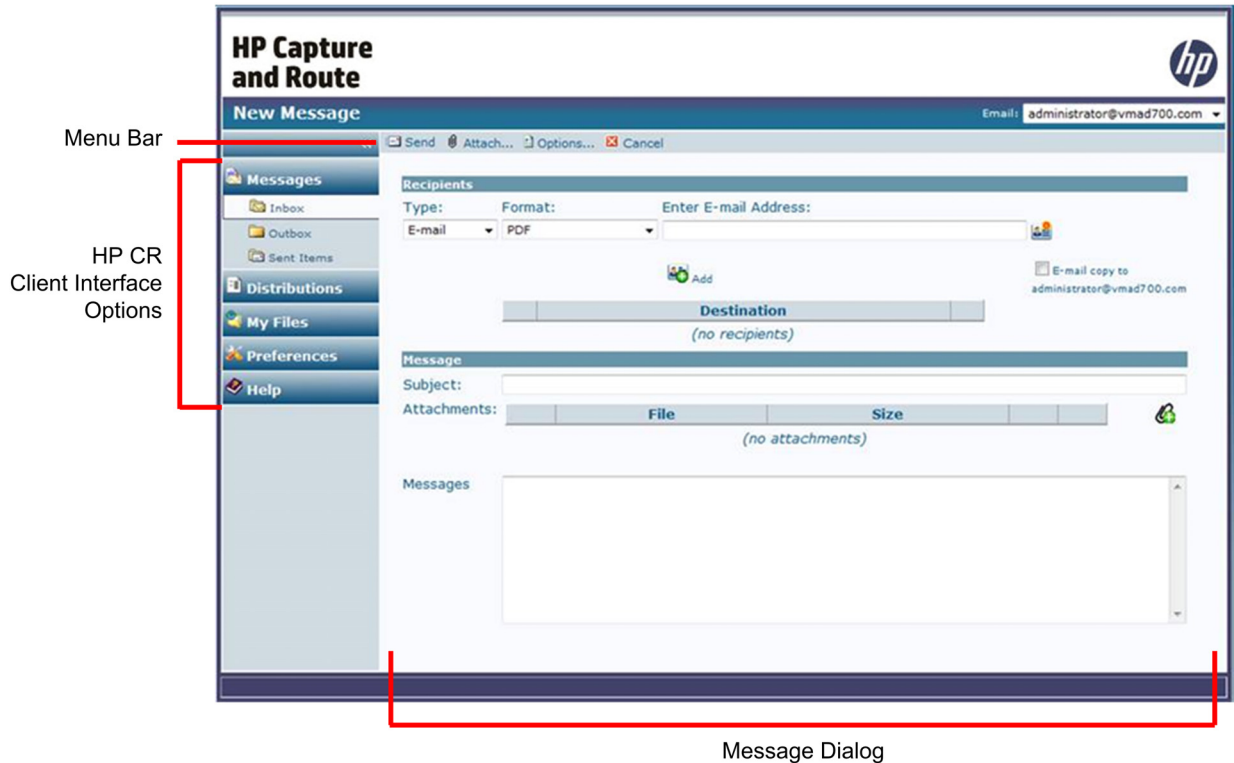


Figure 1-4 Example of the HP CR Client with a message dialog

Features available through the HP CR Client enable you to:

- Review your Inbox, Outbox, and list of Sent Items ([Message Lists](#), 8)
- Create personal or public distributions for scanning to a fax, email, or folder ([Distributions](#), 13)
- Create and send messages to a fax, email, or folder ([Sending Messages](#), 10)
- Create Routing Sheets ([Routing Sheets](#), 24)
- Set message options and general preferences ([More Options and Preferences](#), 17)
- Perform administrative tasks ([Administration Node](#), 19)

In addition, the My Files feature ([My Files](#), 30) provides unique options. You can scan and convert documents for your own purposes without distributing them to anyone else. My Files enables easy and secure document use, Routing Sheet creation, editing, storage, and retrieval.

1-4 HP CR Embedded Device Client

The HP CR Embedded Device Client device has a touch screen used to access options and enter information.

Figure 1-5 Device display panel

The HP device display panel provides scanning options, depending on your device configuration:

- **Personal Distributions** are for use by an individual. You can have one distribution defined for sending information to people within your company and another distribution for sending information outside the company. ([Creating a Personal distribution](#), 14)
- **Public Distributions** are created by a system administrator for use by members of a group. For example, all members of the marketing group may have a distribution predefined specifically for their use. ([Creating a Public distribution](#), 16)
- **Routing Sheet** uses a special page with a barcode and distribution instructions for your document. ([Creating a Routing Sheet](#), 25)
- **Scan to My Files** quickly routes an electronic file directly to your “My Files” folder on the HP CR Client. This is used to scan and convert documents for personal use without distributing to anyone else. ([Creating a My Files Routing Sheet](#), 31)
- **Fax** provides simple send-to-fax capability. After entering a fax number at the device and scanning the document, HP CR delivers it and issues a confirmation. ([Using the Fax option on the device](#), 26)
- **Fax Release** is used by authenticated users to release faxes and override Fax Hold Calendars on devices configured to receive inbound faxes. ([Sending a message from the HP device](#), 12)
- **Scan to Me** scans and delivers a document to your PC for further review and routing. HP CR sends the document to your email address (the default) or to a Windows home folder defined by a system administrator. ([Using the Scan to Me option on the device](#), 29)
- **Scan to Folder** scans a document to a folder predetermined by your system administrator. ([Using the Scan to Folder option](#), 27)
- **Mobile Reservations** delivers scanned documents to the recipient based on the Mobile Reservation Code entered at the device. ([Mobile Reservations](#), 16)

Some features require that you authenticate yourself at the device (such as by logging in), either for security and tracking authorization or to access personal scanning features.

1-5 Document Management extensions

HP CR enables Microsoft SharePoint users to import hardcopy documents into SharePoint libraries. HP CR also supports user extensions into HP Autonomy WorkSite. You can:

- Use a Routing Sheet
- Create a Scan Reservation
- Open a document in the End User Interface

Once imported, you can browse through the DMS client interface to locate documents. For more information, see

- [Using Extensions for Microsoft SharePoint](#) (11-32)
- [Using Extensions for Autonomy WorkSite](#) (12-34)

1-6 HP CR Mobile Client

The **HP CR Mobile Client** supports on-the-go business users with versatile mobile document capture capabilities. Mobile Client users can capture and distribute documents directly from their device or cloud-based storage to any of their usual destinations (including Personal, Group or Preset distributions).

NOTE: Preset distributions on the HP CR Mobile Client can include any scan-to-self distributions (to MyFiles or routed directly to the user's email).

Users can also create **Mobile Reservations**, preparing a Mobile Scan Reservation Code for later use at an MFP inside or outside their business network. The system uses the Mobile Scan Reservation Code to appropriately distribute the submitted document information.

You can apply **Passwords** and available **PDF Document Stamps** to messages and distributions in the Mobile Client from Document Delivery Options. Mobile Client users can also use the application to define alerts, receive notifications, and adjust settings.

The HP CR Mobile Client and Mobile Reservations are useful when working outside the office, during travel or whenever you need to import document information into your usual business workflow. For more information, see

- [HP CR Mobile Client](#) (13-38)
- [Mobile Reservations](#) (4-16)

1-7 On-line help

Click the **Help** button at any time to access [HP CR on-line documentation](#).

Part I:

Working on the Desktop

2 Organizing Messages

2-1 Message Lists

Your **Inbox**, **Outbox**, and **Sent Items** are lists that display messages and applicable details (such as who sent or received a message, the subject, date and time, status, and number of pages transmitted). To view a list:

1. Open the HP CR Client.
2. Click **Messages**.
3. Click the option: **Inbox**, **Outbox**, or **Sent Items**.
4. Click a message to review details.




You can also perform actions based on a specific list, as described for [Inbox](#), [Outbox](#), and [Sent Items](#).

2-2 Inbox

Your **Inbox** may contain:

- Confirmations of fax or email transmissions initiated and completed within HP CR
- Inbound faxes and emails addressed to you that HP CR received

Actions you can take with a message(s) are:

- Click **New** on the menu bar to create and send a new message.
- Click  to open or save the PDF attached to the message.
- Select a message(s) from the list by checking the box to the left of the message(s). Alternatively, check the box in the title bar to select all messages. Then, click a menu bar option to:
 - **Forward Attachments** – Attach additional information and/or documents and then send the message(s).
 - **Delete** – Delete the message(s).
 - **Print Attachments** – Print documents attached to the message(s).
 - **Mark as Read** – Indicate you read the message(s).  denotes a read message.
 - **Mark as Unread** – Indicate you have not read the message(s).  denotes an unread message.
- Click on the message in the **Received From** column to:
 - Display message details.
 - Resend the message (click **Resend**).
 - **Forward Attachments**, **Print Attachments**, or **Delete**, as described above.


2-3 Outbox

Outbox presents a list of your jobs that are currently being processed by the HP CR server. You can:

- Click **New** on the menu bar to create and send a new message.
- Click **Cancel** on a selected job to stop processing.

2-4 Sent Items

Sent Items presents a list of completed jobs. You can:

- Click **New** on the menu bar to create and send a new message.
- Click  to open or save the PDF attached to the sent message.
- Select a message(s) from the list by checking the box to the left of the message(s). Alternatively, check the box in the title bar to select all messages. Then, click a menu bar option to:
 - **Forward Attachments** – Attach additional information and/or documents and then send the message(s).
 - **Delete** – Delete the message(s).
 - **Print Attachments** – Print documents attached to the message(s).
- Click on the message in the **Sent To** column to:
 - Display message details.
 - Resend the message (click **Resend**).
 - **Forward Attachments**, **Print Attachments**, or **Delete**, as described above.

3 Sending Messages

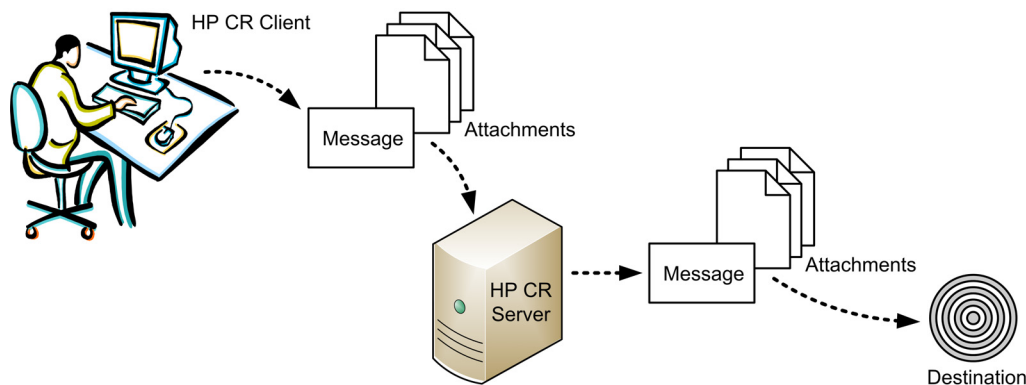
You can send a message from:

- Your PC, see [Sending a message from the HP CR Client](#) (10)
- The HP device, see [Sending a message from the HP device](#) (12)

3-1 Sending a message from the HP CR Client

Sending a message directly from the HP CR Client is also referred to as direct sending. You can send a message with optional attachments to a folder, printer, fax, or email.

Figure 3-1 Scan and distribute from your PC




1. Open the HP CR Client.
2. Click **Messages**.
3. Click **New** on the menu bar.
4. Determine the type of recipient to add. In the **Recipients** section, select a **Type** and **Format**:
 - **Folder** – The format automatically defaults to PDF. Select the format of interest.
 - **Printer** – The format automatically defaults to PDF (required format for printing).
 - **Fax** – The format automatically defaults to TIFF (required format for faxing).
 - **Email** – Select the format of the file you are sending by email.

NOTE: If you select a DOC, RTF, or TXT format, HP CR converts any image files so they are editable and searchable. PDF Image+Text and PDF Text are also searchable. PDF Image formats are not searchable. Options that display the letters OCR indicate the system will perform optical character recognition. This means HP CR will read the scan and determine how letters and characters translate to text. Handwritten text is not recognized but will remain a part of your document as an image.

5. Enter type-specific information:
 - **Folder** – Click **Add** to open the **Select Folder** page. Use this screen to set folder-specific details.

Select an existing Folder or (with permission) click **Create Folder** to create a new one. (Enter the new **Folder Name** in the **New Folder** pop-up box and click **OK**. The new Folder appears in the **Select Folder** list.)


With the Folder selected, enter a **File name** and from the **Action** drop-down menu, select whether you want this file to be **created new**, **overwrite** an existing file, or be **appended** to an existing file. You can also choose to **encrypt** or apply a **document stamp** to the PDF. Click **OK** when finished.


- **Printer** – Select a **Destination** (IP address).
- **Fax** – Enter the destination fax number in the **Enter Fax Number** field or click  (if available) and select a fax destination from your Microsoft Outlook contacts and Global Address Book.



Click  to add more information about the recipient, or click  to verify the address is valid.


- **Email** – Enter the email address in the **Enter Email Address** field or click  (if available) and select an address from your Microsoft Outlook contacts and Global Address Book.

Click  to add more information about the recipient, or click  to verify the address is valid.

6. Click the **Add** button  to add the recipient to the Destination list.

NOTE: To modify recipient information, click the recipient destination on the list and enter your changes. To remove a recipient from the list, click  to the right of the recipient destination.

7. Repeat Steps 4 through 6 to add recipients to your distribution.
8. Optionally, select the **Email copy to...** checkbox to send a copy of your message to yourself.
9. In addition to scanning paper hardcopy documents, you can instruct HP CR to append electronic files to your transmission:
 - a Click .
 - b Click **Browse**, select a file, and click **Open**.
 - c Click  to add the file to the list.
 - d Repeat for all files you want to send.
 - e After the desired files are added, select **OK**.

NOTE: To remove a file from the list, click  to the right of the file name.

10. In the **Subject** field, enter a subject for your distribution.
 Fax recipients will see this text on the cover page they receive from HP CR. Email recipients will see this text in the subject line of the email they receive.
11. In the **Messages** field, enter any text to accompany your document.
 Fax recipients will see this text on the cover page they receive from HP CR. Email recipients will see this text in the body area of the email message they receive.
12. Click **Send** on the menu bar. The Inbox opens and the message is listed in **Sent Items** (under **Messages**). In **Sent Items**, you can click on a message to review details. ([Sent Items](#), 9)

3-2 Sending a message from the HP device

3-2-1 Sending from the HP CR Embedded Device Client

For descriptions of how to use the message sending options available on the HP CR Embedded Device Client, see:

- [Routing Sheet](#)
- [Personal Distributions](#)
- [Public Distributions](#)
- [Fax](#)
- [Fax Release](#)
- [Scan to Me](#)
- [Scan to Folder](#)
- [Scan to My Files](#)
- [Mobile Reservation](#)

3-2-2 Sending from the HP CR OXPd v1.4 Device

For descriptions of how to use the message sending options available on the HP CR OXPd v1.4 Device, see:

- [Routing Sheet](#)
- [Public Distributions](#)
- [Personal Distributions](#)
- [Scan to Me](#)
- [Fax](#)
- [Scan to Folder](#)
- [Scan to My Files](#)

4 Distributions

A distribution is a defined group of one or more recipients and associated routing rules. By creating a distribution, you avoid the need to manually enter recipients each time you want to send a document to the group. You can use:

- [Personal distributions](#) (14), called “My Distributions,” that you create for your unique needs. 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.

You can also turn Personal distributions into Shared ones for sharing with subscribers.

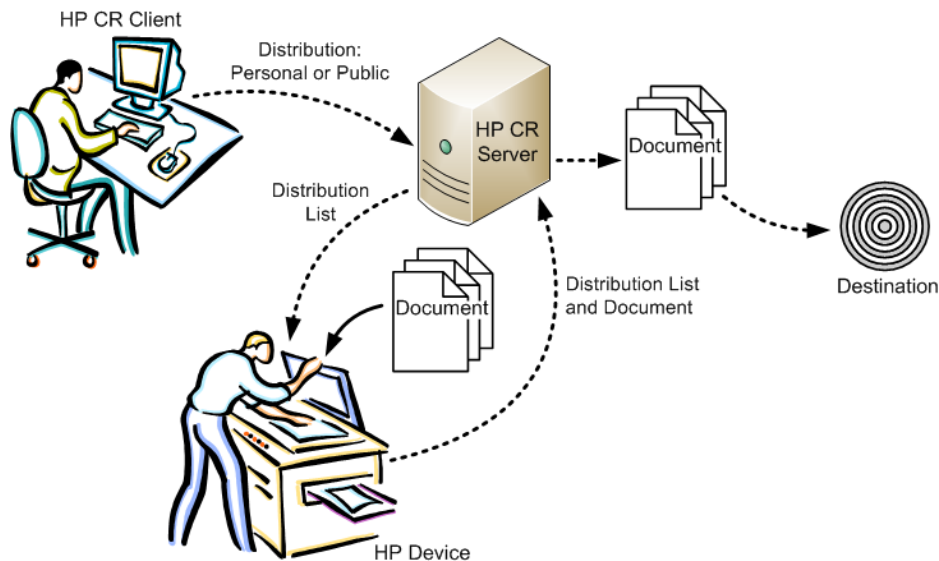
- [Public distributions](#) (16) that a system administrator creates for use by a group. For example, all members of the marketing group may have a distribution predefined specifically for their use.

You can also use Distribution Collections, which are collections of Public distributions that a system administrator creates for use by specific user or device groups.

- [Mobile Reservations](#) (16), which are distributions created by the HP CR Mobile Client and identified by the system using Mobile Scan Reservation Codes.

Distributions are available on the HP CR Embedded Device Client display panel. Personal Distributions require authentication. By default, Public Distributions do not. With one touch, you can instruct HP CR to send your document to the recipients in your desired format.

Figure 4-1 Scan and distribute using a distribution











4-1 Personal distributions



4-1-1 Creating a Personal distribution


1. Open the HP CR Client.
2. Click **Distributions**. (**My Distributions** is selected by default.)
3. Click **New** on the menu bar.
4. Determine the type of recipient to add. In the **Recipients** section, select a **Type** and **Format**:
 - **Folder** – Select the format of the file you are sending to a folder.
 - **Printer** – The format automatically defaults to PDF (preferred format for printing).
 - **Fax** – The format automatically defaults to TIFF (preferred format for faxing).
 - **Email** – Select the format of the file you are sending by email.

NOTE: If you select a DOC, RTF, or TXT format, HP CR converts any image files so they are editable and searchable. PDF Image+Text and PDF Text are also searchable. PDF Image formats are not searchable. Options that display the letters OCR indicate the system will perform optical character recognition. This means HP CR will read the scan and determine how letters and characters translate to text. Handwritten text is not recognized but will remain a part of your document as an image.

5. Add type-specific information:
 - **Folder** – Select a destination folder.
 - **Printer** – Select a destination IP address.
 - **Fax** – Enter the destination fax number in the **Enter Fax Number** field or click  (if available) and select a fax destination from your Microsoft Outlook contacts and Global Address Book.
Click  to add more information about the recipient, or click  to verify the address is valid.
 - **Email** – Enter the email address in the **Enter Email Address** field or click  (if available) and select an address from your Microsoft Outlook contacts and Global Address Book.
Click  to add more information about the recipient, or click  to verify the address is valid.
6. Click  to add the recipient to a list where the **Type** and **Destination** are displayed.

NOTE: To modify recipient information, click the recipient destination on the list and enter your changes. To remove a recipient from the list, click  to the right of the recipient destination.

7. Repeat Steps 4 through 6 to add recipients to your distribution.
8. Optionally, select the **Email copy to...** checkbox to send a copy of your message to yourself.
9. In addition to scanning paper hardcopy documents, you can instruct HP CR to append electronic files to your transmission.
 - a Click .
 - b Click **Browse**, select a file, and click **Open**.
 - c Click  to add the file to the list.
 - d Repeat for all files you want to send.
 - e After the desired files are added, select **OK**.

NOTE: To remove a file from the list, click  to the right of the file name.

10. In the **Subject** field, enter a subject for your distribution.
Fax recipients will see this text on the cover page they receive from HP CR. Email recipients will see this text in the subject line of the email they receive.
11. In the **Comments** field, enter any text to accompany your document.
Fax recipients will see this text on the cover page they receive from HP CR. Email recipients will see this text in the body area of the email they receive.
12. Click **Save** on the menu bar to save your distribution.
13. A message prompts you to enter a name for the distribution so you can reuse or change it later. This distribution title will appear on the HP device display panel. Enter a suitable name to help you remember the contacts and formats of the distribution. Click **OK**.

You can send a message with a personal distribution from:

- HP Client by adding any additional text and/or attachments, and clicking **Send**.
- HP device using the **Personal Distributions** option.

4-1-2 Creating a shared distribution

1. Open the HP CR Client.
2. Complete the procedure for [Creating a Personal distribution](#) (14), but do not save or title the distribution yet (the last two steps in that procedure).
3. Click **Options** on the menu bar. The **Options** dialog box appears.
4. On the **General** tab, select **Publish as public**.
5. Click **OK** to close the **Options** dialog box.
6. Click **Save** on the menu bar to save your distribution.
7. A message prompts you to enter a name for the distribution so you can reuse or change it later. This distribution title will appear on the HP device display panel. Enter a suitable name to help you remember the contacts and formats of the distribution. Click **OK**.

Once you create a shared distribution, other users can subscribe to it ([Subscribing to and using a shared distribution](#), 15).

4-1-3 Subscribing to and using a shared distribution

You can subscribe to a distribution created and made public by another user.

1. Open the HP CR Client.
2. Click **Preferences**.
3. Click **Add Subscriber** in the **Subscribed Distributions** section to choose shared distributions that you want to subscribe to and use. You can subscribe to the public distributions of multiple users.
4. Add your email address and click **OK**.

The distributions to which you subscribe are listed in **Shared Distributions** on the HP CR Client. You can send a message with a shared distribution from:

- HP Client by adding any additional text and/or attachments and clicking **Send**.
- HP device using the **Personal Distributions** option.

4-2 Public distributions

4-2-1 Creating a Public distribution

Public Distributions are created by your system administrator. Contact your administrator with questions.

4-2-2 Using Distribution Collections

Distribution Collections (found under **Distributions**) can be made available (assigned) to specific user groups by your system administrator. You cannot edit an existing distribution within a Distribution Collection, but you can modify distributions and use **Save As** to generate a new one.

To save an existing distribution within a Distribution Collection as a new modified one on the HP CR Client:

1. Open the HP CR Client.
2. Click **Distributions**.
3. Select the Distribution Collections list that you want to modify.
4. Click the **Distribution** for which you want to create a modified version. Details for that Distribution appear in the Results pane.
5. Edit the **Recipient** information as needed and click the **Add** button.
6. Add any attachments, if needed, and click **Save As**.
7. Click **My Distributions** in the Actions pane to view your new Personal Distribution. It appears there because while you cannot modify the existing public distribution that is associated with a collection, the changes you make are saved as a new Personal Distribution.

4-3 Mobile Reservations

Mobile Reservations are for distributions created by the HP CR Mobile Client. The Mobile Client supports on-the-go users with versatile mobile document capture capabilities.

Mobile Client users can capture and distribute documents directly from their device or cloud-based storage to any of their usual destinations. They can also create Mobile Reservations, preparing a Mobile Scan Reservation Code for later use at an MFP inside or outside their business network.

The system uses the Mobile Scan Reservation Code to appropriately distribute the submitted document information. This is useful when working outside the office, during travel or whenever you need to import document information into your usual business workflow.

5 More Options and Preferences

5-1 Using the Options feature

When working with a new message or new/existing distribution, HP CR provides options to control document formatting and routing. Click **Options** on the menu bar and the **Options** dialog box appears. It may include the following tabs and options (not all options are available for every HP CR function):

- **General** – For messages only:
 - **Apply Document Stamp** – Optionally apply a document stamp to each page of the delivered file. This only applies to .PDF output files.
- **General** – For distributions only:
 - **Routing Sheet Style** – Specify the style as **Simple** or **Standard**. For example, a standard style may include company information and/or a disclaimer.
 - **Publish as public** – Publish the distribution as available to users who subscribe to a user's public distributions.
 - **Retain Routing Sheet in delivered document** – Deliver the Routing Sheet with the document. Normally, it is not.
 - **Single use** – Indicate that the message or distribution is intended for one-time use only.
 - **Sort at top of device listing** – Places the distribution at the top of the device display panel. Normally, lists are presented alphabetically.
 - **Expiration** – Specify whether or not the distribution expires, and if so, when:
 - **No expiration** – Distribution has no expiration date.
 - **Expires** – Enter the amount of **days/months/years** after the **date created/date modified/last used** at which the Distribution expires.
 - **On Specific Date** – Enter the **specific date** at which it expires. (Click the text field and select a date from the pop-up calendar.)
 - **Apply Document Stamp** – Optionally apply a document stamp to each page of the delivered file. This only applies to .PDF output files.
 - **Print w/Prompts** – Allows you to enter the value for assigned prompts when the Routing Sheet is printed from the HP CR Client.
- **Email**
 - **Address Type** – Specify the address type as **To**, **Cc**, or **Bcc**.
 - **Attachment File Name** – Enter the name of a specific file to attach to your transmission.
 - **Encrypt PDF Document** – Set a password to be applied to the final delivered document. This only applies to .PDF output files.
- **Fax**
 - **Use Cover Sheet** – Choose to send/not send a cover page and select from a stored list of styles.

- **Delivery** – Enter an access code (such as “9” to reach an outside line for faxing), request a preview of your transmission before sending, specify that a fax is sent only to a secure fax destination, define a specific time/date for fax delivery, and/or define the send priority.
- **Folder** – Enter the name of your document.
 - **Encrypt PDF Document** – Set a password to be applied to the final delivered document. This only applies to .PDF output files.
- **Prompts** – Indicate that when you perform a task in HP CR, the system will request that you to enter custom prompts such as a client number or, in certain legal departments or law firms, a matter number.
- **Custom Options** – Displays custom options that your administrator may have created and configured for your organization's use of HP CR.
- **Scan Settings** – Applies to distributions only. This provides settings for color, duplexing, job building, orientation, and resolution.
- **Confirmation** – Set the confirmation criteria and options for documents.

After modifying options on each tab, select **Save as preferences** to save the settings for future messages or distributions. Click **OK** when finished.

5-2 Setting preferences

You can set general preferences for your use with the HP CR Client. Click the **Preferences** button to access the settings. All the **Preferences** settings are optional. (Available settings can vary based on HP CR Server configuration.)

- **User Info** – Review your user information. By default, this information is acquired from your domain login.
- **Folder Authorizations** – Provide authorization for the HP CR server to transfer information to and from cloud storage.

Select the cloud storage folder type of interest and click the **Proceed to Dropbox** button. CloudStorage prompts you to enter appropriate credentials.

- **Subscribed Distributions** – Add email addresses of users in order to access their public distributions.

Click **Add Subscriber** to choose shared distributions that you want to subscribe to and use. You can subscribe to multiple distributions.

NOTE: A user can create distributions to share with other users by designating them as Public. ([Creating a shared distribution](#), 15)

- **Delegates** – Identify users you want to manage your messages and/or send messages on your behalf.

Click **Add Delegate** to enter the relevant email addresses. You can specify multiple delegates.
- **Fax Preferences** – Configure additional recipients for inbound faxes by specifying a **Network Printer** or an **Assistant**.
 - **Network Printer** – Enter an address. This can be referenced through a rule on the server to send inbound faxes to this printer.
 - **Assistant(s)** – Enter the email address of the person who can also view your faxes.

After modifying your Preferences, select **Save Preferences** to save the settings for your use.

6 Administration Node

The **Administration** Node is an optional HP CR Client feature that can be configured for authorized users by your system administrator. Customized options can be assigned to specific authorized user groups.

NOTE: Server Administrators can assign either default or administrative views to specific user groups on the **Web Client** tab of **Group Properties** in the HP CR Server Administrator. They can customize the views on the **Web Client View Properties** page.

Customized options that can be configured for authorized Administrative users include:

- [Configuring Routing tables](#) (6-19)
- [Verifying Devices](#) (6-20)
- [Configuring Fax Release schedules in the Calendar node](#) (6-20)
- [Using the Help Desk](#) (6-20)

6-1 Configuring Routing tables

1. In the HP CR End User Interface, click the **Administration** button. Click **Routing** and then click the **New** button. The **Routing Destination Properties** page opens.
2. Enter the following information in the **New Routing Destination** page:
 - **Fax Number:** Enter the fully normalized fax number. For example: +10005551234
 - **Device Serial Number:** Enter the serial number for the HP device.
 - For the **Manual Hold** option, check the **Hold all jobs** option if all inbound fax jobs to this device number are to be held indefinitely.
 - If you selected the **Manual Hold** option, go to the **Manual Override Pin** text box and enter the PIN value to be used for enabling or disabling Manual Hold.
 - **Fax Release Calendar:**
 - Check the **Enabled** option.
 - Select the **Calendar** from the drop-down menu.
 - Select the **Time Zone** from the drop-down menu.

NOTE: To be an option, the Fax Release Calendar must be created first.

- **Destination:** Choose **Print on Device Printer**, **Route via RightFax**, or the **Email/UNC** option:
 - For the **Print on Device Printer** option, provide the device IP Address or the UNC path to the device.
 - If using a Regulated Printer, select the **Regulated Destination** check box and enter the IP Address or the UNC path to the regulated printer.
 - You can select the **Print on specific Media** check box and identify from the drop-down menu the paper size on which incoming faxes will be printed.

- You can also select the **Apply Document Stamp** check box and choose the stamp type of interest from the drop-down menu.
 - For the **Route via RightFax** option, select **HP CR FSP Connector for RightFax** from the first drop-down menu and then select the server address of the RightFax Server from the second drop-down menu.
 - For the **Email/UNC** option, select either **E-mail** or **UNC** and enter the email address or UNC path in the **Destination** text box.
 - You can define a specific document format from the **Delivery Format** drop-down menu.
 - You can also specify a document name in the **Delivered Document Name** text box.
3. Click **OK** to finish.

6-2 Verifying Devices

To verify that a device was added properly:

1. In the HP CR End User Interface, click the **Administration** button and then click **Routing**.
2. In the **Find** drop-down menu choose **Fax Number**. Optionally, you can choose the **Device Serial Number**.
3. Enter the fax number and click **Go**.
4. Verify that the DTT entry shows up.
5. Click on the fax number or the Device Serial Number, verify that the properties for the DTT entry appear.

6-3 Configuring Fax Release schedules in the Calendar node

1. In the HP CR End User Interface, click the **Administration** button. Then click **Calendars**.
2. Click the **New** button and enter a name for the Calendar.
3. Enter start and end times for Monday - Friday.
4. Select **Saturday** and enter start and end times for Saturday.
5. Select **Sunday** and enter start and end times for Sunday.

NOTE: Saturday and Sunday must be configured for all calendars that are created.

6-4 Using the Help Desk

Administrative access to the **Help Desk** provides authorized users the ability to oversee and manage Messages and Distributions (both their own and those of others).

Help Desk users can perform administrative tasks related to Messages and Distributions, including

- searching based on specific criteria
- viewing process details and history
- cancelling from the active queue

- re-sending processed messages
- viewing associated attachments

NOTE: Server administrators authorize Administrative access to Help Desk for user groups on the **Web Client** tab of **Group Properties**.

Permission to perform individual Help Desk tasks, such as opening attachments, is granted on the **Security** tab of **Folder Permissions**, accessed from **Web Client View Properties**.

6-4-1 Searching Messages and Distributions

Help Desk users can conduct searches based on any of the following criteria:

- Status (in process, succeeded, or failures)
- Date and time ranges
- Job ID
- Sender
- Destination

To search Messages and Distributions:

1. Click **Search** from the Help Desk menu bar.
2. Select the criteria of interest and click the **Search** button. A list of results appears.
3. To resend or cancel items in the list, see [Managing Messages and Distributions](#) below.

6-4-2 Managing Messages and Distributions

Help Desk users can work directly with the list of Help Desk items or with any individual message. Click any message in the list to view its **Message Properties**.

Using the Message Properties

- To re-send the current message, click **Resend**.
- To view the message attachment(s), click the filename. You can forward or print the document directly from the desktop application in which it is being viewed.

Using the Help Desk list or Search results

- Re-sending messages
 - a Select the check boxes for those items of interest.
To select all messages, click the check box at the top of the table.
 - b Click **Resend** on the Help Desk menu bar.
- Canceling messages
 - a Select the check boxes for those items of interest.
To select all messages, click the check box at the top of the table.
 - b Click **Cancel** on the Help Desk menu bar.

NOTE: Help Desk users can only cancel messages that are still in progress.

- Viewing Messages
 - a Click the message of interest from the Help Desk list or from Search results.
 - b The **Message Properties** screen appears with detailed information for the selected message.
- Viewing attachments
 - a Click the message of interest from the Help Desk list or from Search results. The **Message Properties** screen appears.
 - b In the **Attachments** section, click directly on the attachment filename to view the file. You can forward or print the document directly from the desktop application in which it is being viewed.

Part II:

Working off the Desktop

7 Routing Sheets

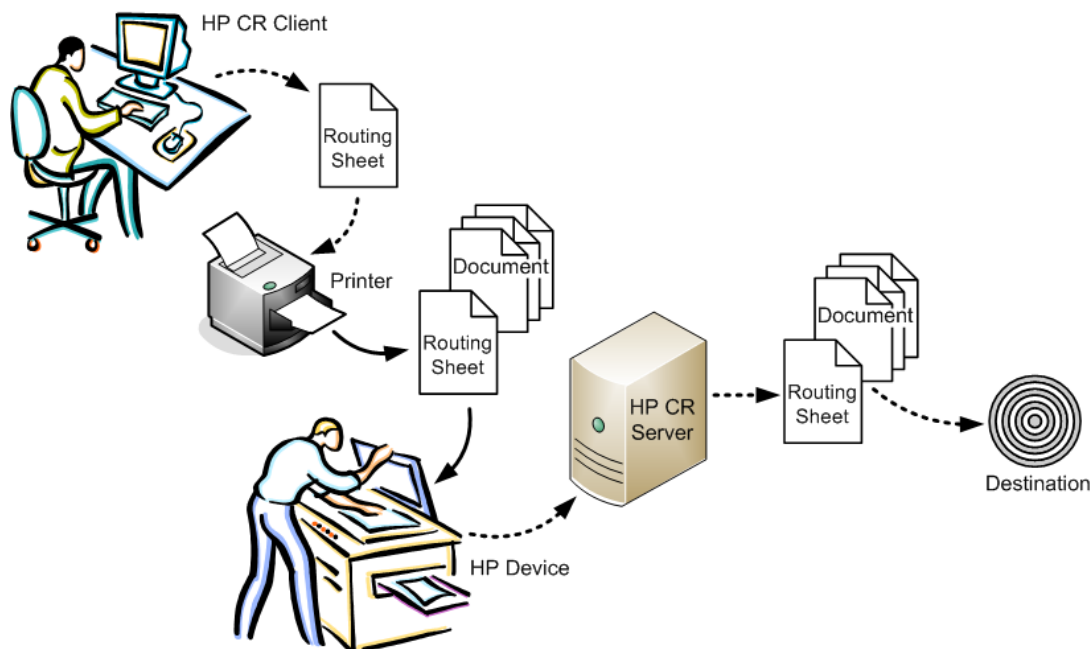
An HP CR Routing Sheet is a special page with a barcode containing the distribution instructions for your document. You can create the Routing Sheet using the HP CR Client interface and specify:

- Who should receive your document
- What communications channel to use (fax, email, folder, or printer)
- Any optional format conversions required for each recipient

A Routing Sheet makes it easy to identify the documents ready for scanning, much like a traditional fax cover page. You can reuse Routing Sheets for standard, repeated tasks. Use a Routing Sheet to:

- Scan and route multiple documents at the same time. Routing Sheets separate documents that are put together in a feeder as a batch and each unique document set has distinct routing rules.
- Send scanned hardcopy documents and electronic documents in multiple formats through one transmission simultaneously. If you want to email a hardcopy document to one recipient and fax it to another, a single Routing Sheet with instructions for both destinations will suffice.

Figure 7-1 Scan and route a document or multiple documents



7-1 Creating a Routing Sheet

1. Open the HP CR Client.
2. You create a Routing Sheet based on a distribution. Do one of the following:
 - Open an existing distribution:
Click **Distributions**.
Click to open a distribution on the list.
 - Create a new distribution. ([Creating a Personal distribution](#), 14)
3. Click **View RS** on the menu bar to launch your default PDF reader and display a copy of the Routing Sheet associated with the distribution.
4. Print the Routing Sheet.
5. Click **Close** to return to the **Distributions** dialog box.
6. You can take your new Routing Sheet and document to the HP device.



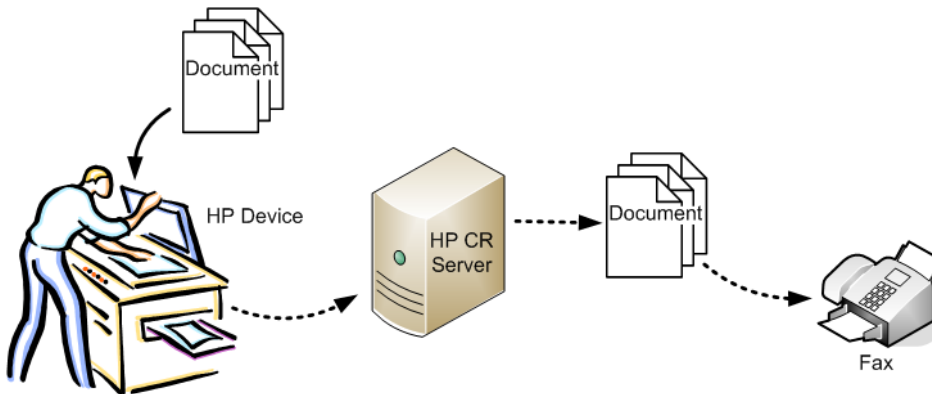
TIP: If you create a Routing Sheet for a distribution group to which you commonly send documents, file and reuse it as needed.

8 Scanning to a Fax or Folder

8-1 Using the Fax option on the device

When you enter a fax number and scan your document using the **Fax** option, the device delivers the document to the HP CR server, which sends the fax to intended recipients. By default, fax scans are performed in black and white, since documents cannot be delivered via fax communication in color.

Figure 8-1 Using the Fax option



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.)
3. Press the **Fax Number** text box and enter the destination fax number using the keypad that opens. Press **OK** to close the keypad.

NOTE: 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 selected (if this option appears). Then, press **Next**. Continue with Step 5.

To add a cover sheet using HP OXPd 1.4:

- a Press the **Add Cover Sheet** text box.
- b Select **Yes** and **OK** to return to the **Fax** screen.
- c Press **Next** to display the **Cover Sheet** screen.
- d Enter information in the **Subject**, **Sender Name**, and **Recipient Name** text boxes. To do so, press the text box, use the keypad, and press **OK** to close the keypad.
- e Press **Next** to display the **Fax** screen.

To add a cover sheet using HP OXPd 1.6:

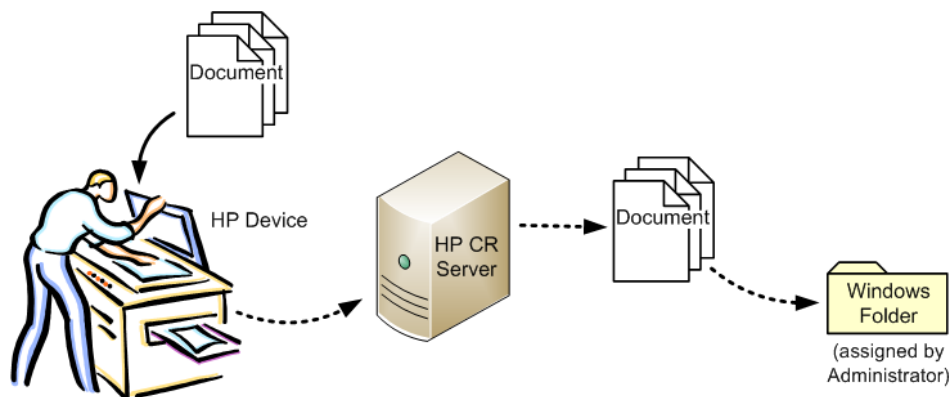
- a Press the **Add Cover Sheet** check box.
- b Enter information in the **Sender Name**, **Recipient Name**, and **Subject** text boxes.
- c Press **Next**.

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 **Options** or **More Options** ([Using the Options feature](#), 17) to change scan settings (such as parameters for control over document routing and formatting).
7. Press , **Start**, or **Scan** to begin scanning. A progress indicator will display.
8. Wait for the job to finish. (Alternatively, press **Cancel** or **Cancel Job** to stop scanning.)
When transfer is complete, a message indicates the job status.
9. To scan another document using the same **Fax** option, press **Back**.
If the **Completed** option is available, you can press it to return to the **Fax** screen.
To end the session and return to the main HP CR menu, press , **OK**, or **Exit**.

8-2 Using the Scan to Folder option

Using the **Scan to Folder** option, the HP CR server sends the document to a folder predetermined by your system administrator. These folders can be cloud storage (HP Flow CM* or Dropbox), Network Folder Share (NFS) or File Transfer Protocol (FTP) destinations.

Figure 8-2 Using the Scan to Folder option



8-2-1 Authorizing cloud storage folders



If you have cloud storage (HP Flow CM* or Dropbox) defined as your folder destination, you must set up authorization allowing the system to access the cloud storage folder.

To set up cloud storage authorizations:

1. In the HP CR Client, select **Preferences**.
2. In the **Folder Authorization** section, select either the **HP Flow CM*** or the **Dropbox** folder and click the **Proceed to** button.
3. Provide your sign in credentials and allow CloudStorage access to all files and folders in your cloud storage of choice.
4. The settings are now applied to your Preferences.

NOTE: * HP Flow CM will be supported by HP CR in a future release.

8-2-2 Using the Scan to Folder option on the device

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.)
Your Folder(s) appear on the device panel.
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 begins. Go to Step 7.
 - If **one touch scan** is NOT enabled (by default), the device shows the **Ready to Scan** message. Continue with the next step.
5. Optionally, press **More Options** ([Using the Options feature](#), 17) to change scan settings (such as parameters for control over document routing and formatting).
6. Press , **Start** to begin scanning. A progress indicator appears.
7. Wait for the job to finish. (Alternatively, press **Cancel Job** to stop scanning.)
When the transfer is complete, a message indicates the job status.
8. To scan another document to the same network folder, press **Scan More**.
To end the session and return to the main HP CR menu, press **Home** , the **Red X** (Pro devices) or the **Done** button.

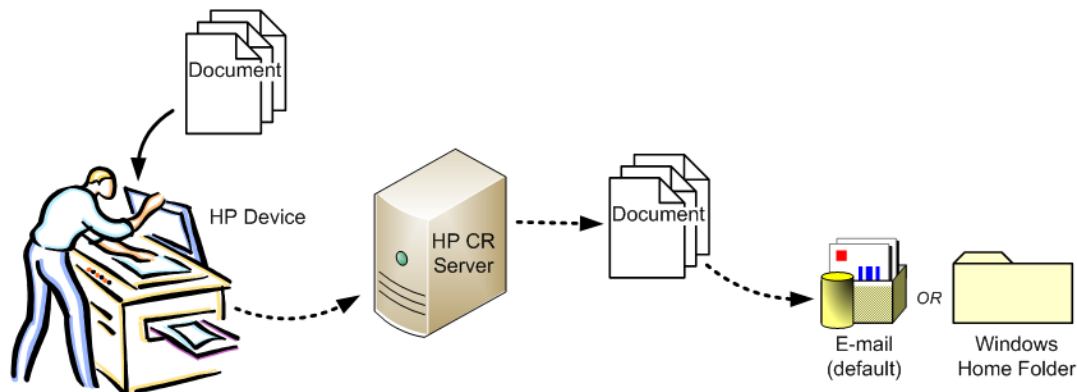
9 Using Scan to Me



9-1 Using the Scan to Me option on the device

The **Scan to Me** option scans a document and delivers it to your PC for further review and routing. Based on a directive (rule), HP CR sends the document to your email address (the default) or to a Windows home folder. The directive is defined by your system administrator and specifies the destination (email or folder) as well as the final format in which to send the document.

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

Figure 9-1 Using the Scan to Me option



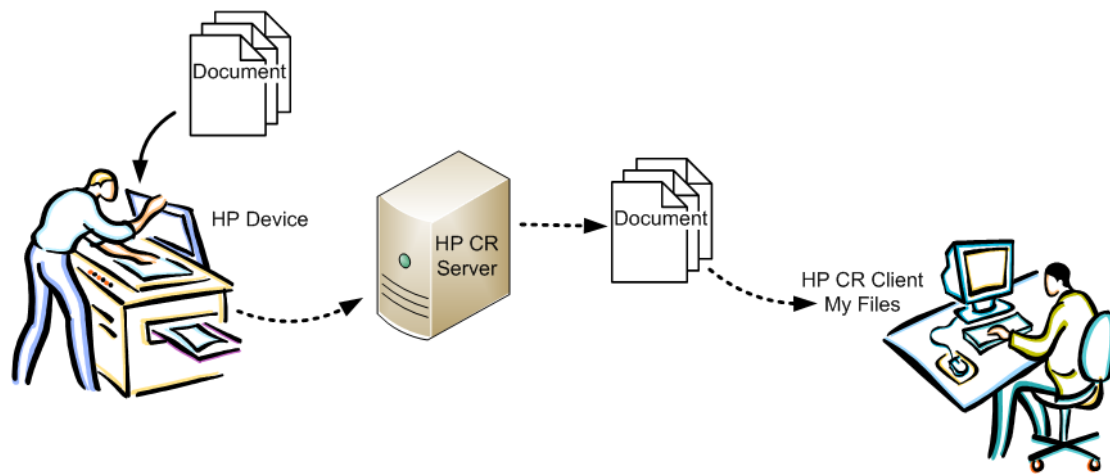
1. Assemble your document and go to the device.
2. Press **Scan to Me**. (If this option is not visible, find it using the scroll bar.)
3. If prompted, enter user login information to access the **Scan To Me** option.
4. Press **Next**, if necessary.
5. Load the document into the document feeder or place it on the exposure glass. (Use the exposure glass only if scanning a single page.)
6. Optionally, press **Options** or **More Options** ([Using the Options feature](#), 17) to change scan settings (such as parameters for control over document routing and formatting).
7. Press , **Start**, or **Scan** to begin scanning. A progress indicator will display.
8. Wait for the job to finish. (Alternatively, press **Cancel** or **Cancel Job** to stop scanning.)
When transfer is complete, a message indicates the job status.
9. To scan another document using the **Scan to Me** option, press **Back**.
If the **Completed** option is available, you can press it to return to the **Scan to Me** screen.
To end the session and return to the main HP CR menu, press , **OK**, or **Exit**.

10 My Files

You may want to scan and convert documents for your own purposes without distributing to anyone else. However, you may have requirements for secure, auditable storage of such documents. The HP CR **My Files** feature lets you quickly create a Routing Sheet or use a button on the HP device display panel to route your scan directly to your personal HP CR folder.


NOTE: Your system administrator manages the storage in **My Files** and may set a storage time limit. Consult your administrator for information on where and how long these documents are maintained before disposal.

Figure 10-1 HP CR My Files process



10-1 Reviewing the My Files list

The **My Files** list indicates the file name, creation date, and size of each file stored in your personal HP CR folder. From this list, you can:

- Click  or the file name to open or save the PDF. ([Opening and saving documents from My Files](#), 31)
- Select a message from the list by checking the box to the left of the message. Alternatively, check the box in the title bar to select all messages. Then, click a menu bar option:
 - **Delete** – Delete the file(s).
 - **My Routing Sheet** – Create a Routing Sheet. ([Creating a My Files Routing Sheet](#), 31)
 - **Forward Attachments** – Attach additional information and/or documents and then send the file(s) in a message. ([Sending a message from the HP CR Client](#), 10)

10-2 Opening and saving documents from My Files

After HP CR completes its scan and conversion of your document and sends it to your personal folder, that folder is viewable through the HP CR Client. Scans sent to this folder are stored temporarily. Copy files from **My Files** to another location for longer-term retrieval, usage, and storage.

1. Open the HP CR Client.
2. Click **My Files**.
3. Click **Files**.
4. Click the document file name in the HP CR list.
5. You can open or save the file.
 - To view the document, click **Open**. Your PDF reader launches and displays your **My Files** document.
 - To save a copy of the document, click **Save** and enter a location and name.

10-3 Creating a My Files Routing Sheet

1. Open the HP CR Client.
2. Click **My Files**.
3. Click **Files**.
4. Click **My Routing Sheet** on the menu bar.
5. Select the final file format for your scanned document.

NOTE: If you select a DOC, RTF, or TXT format, HP CR converts any image files so they are editable and searchable. PDF Image+Text and PDF Text are also searchable. PDF Image formats are not searchable. Options that display the letters OCR indicate the system will perform optical character recognition. This means HP CR will read the scan and determine how letters and characters translate to text. Handwritten text is not recognized but will remain a part of your document as an image.

6. In the **Attachment file name** text box, enter the name of the file that includes your Routing Sheet.
7. Click **View** to launch the PDF reader, showing a copy of the Routing Sheet you just created.
8. Make any changes to the file, as necessary.
9. Click **Save**.
10. Print the Routing Sheet.
11. You can take your new Routing Sheet and document to the HP device.

10-3-1 Using your Routing Sheet

NOTE: All files scanned with the **My Files** Routing Sheet will appear in the **My Files** folder in the HP CR Client.

You can send a message with a Routing Sheet from the HP device using the **Routing Sheet** option.

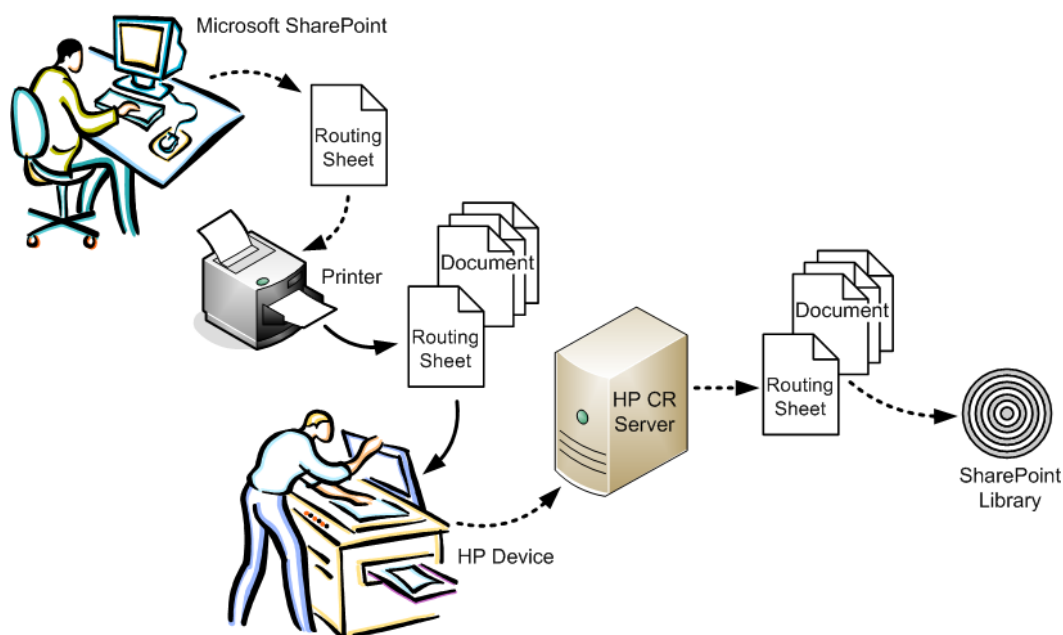
11 Using Extensions for Microsoft SharePoint

HP CR enables Microsoft SharePoint users to import hardcopy documents into SharePoint libraries. The process is driven from the native SharePoint user interface screens and menus. Based on a user-selected format, HP CR converts scanned documents into text-searchable format (PDF or DOC), and then saves the resulting document into the proper SharePoint library, fully profiled and stored alongside other electronic content. Once imported, you can browse through libraries to locate these documents, or use SharePoint enterprise search capabilities.

11-1 Using a Routing Sheet with Microsoft SharePoint

The **Create New Routing Sheet** option creates a Routing Sheet from within your Microsoft SharePoint document library. You can use the Routing Sheet to scan hardcopy documents from any scan enabled device. The documents are submitted to the HP CR server for processing and routing to the Microsoft SharePoint repository according to the Routing Sheet instructions.

Figure 11-1 Using a Routing Sheet with Microsoft SharePoint



1. Open Microsoft SharePoint and go to the document library into which you will route your inbound documents.
2. Click **Upload**. Select the **Upload Scan** option.
3. On the **Upload Scan** page, enter the **Name**, **Title**, and document **Format** for your scan. This is the destination information for the inbound document within the Microsoft SharePoint document library.
4. Click **Save**. The HP CR Client opens.
5. Select the **Create New Routing Sheet** option.

A Routing Sheet is generated with the destination information from Step 3, and opens in your default PDF viewer.

6. Print the Routing Sheet and use it for scanning hardcopy documents. Optionally, save it for later use.

11-2 Creating a Scan Reservation in Microsoft SharePoint

A **Scan Reservation** is the instruction to submit electronic or hardcopy documents to HP CR for uploading to the Microsoft SharePoint repository where they are stored in the appropriate location. The **Create Scan Reservation** option creates a SharePoint placeholder. When a Personal Distribution is selected from the device, the document scans to that placeholder.

1. Open Microsoft SharePoint and go to the document library into which you will scan your inbound documents.
2. Click **Upload**. Select the **Upload Scan** option.
3. On the **Upload Scan** page, enter the **Name**, **Title**, and document **Format** for your scan. This is the destination information for the inbound document within the Microsoft SharePoint document library.
4. Click **Save**. The HP CR Client opens.
5. Select the **Create Scan Reservation** option.

HP CR creates instructions with destination information from Step 3, and displays this message:

Use the Personal Distributions option on the HP device display panel to scan your hardcopy documents. Or, use the HP CR Client to scan electronic documents and send them to the Microsoft SharePoint for storage.

11-3 Opening a document in the End User Interface

The **Open in the End User Interface** option submits an electronic document directly from the SharePoint client to the server.

1. Open Microsoft SharePoint and go to the document library into which you will scan your inbound documents.
2. Click **Upload**. Select the **Upload Scan** option.
3. On the **Upload Scan** page, enter the **Name**, **Title**, and document **Format** for your scan. This is the destination information for the inbound document within the Microsoft SharePoint document library.
4. Click **Save**. The HP CR Client opens.
5. Select the **Open in the End User Interface** option.

The End User Interface opens with the **New Message** screen. The **Destination** section is filled with recipient information from Step 3.

6. Create the message by attaching an electronic document(s). Select other recipients, as necessary.
7. Send the message to the HP CR server for processing.

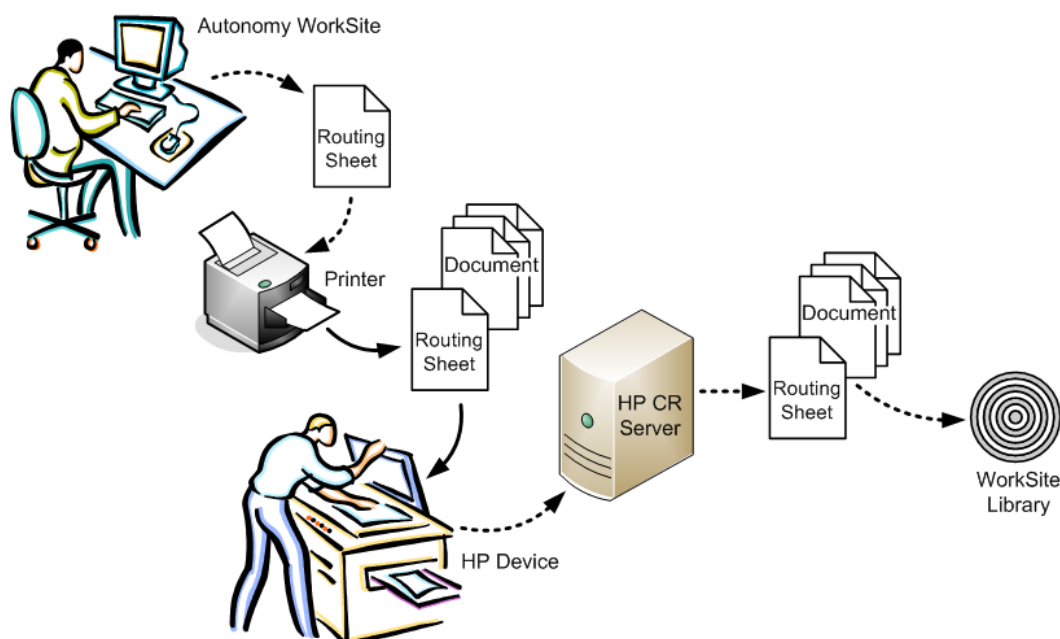
12 Using Extensions for Autonomy WorkSite

HP CR enables Autonomy WorkSite users to import hardcopy documents into WorkSite libraries. The process is driven from the native WorkSite user interface screens and menus. Based on a user-selected format, HP CR converts scanned documents into text-searchable format (PDF or DOC), and then saves the resulting document into the proper WorkSite library, fully profiled and stored alongside other electronic content. Once imported, you can browse through libraries to locate these documents, or use WorkSite enterprise search capabilities.

12-1 Using a Routing Sheet with Autonomy WorkSite

The **Create New Routing Sheet** option creates a Routing Sheet from within your Autonomy WorkSite document library. You can use the Routing Sheet to scan hardcopy documents from any scan enabled device. The documents are submitted to the HP CR server for processing and routing to the WorkSite repository according to the Routing Sheet instructions.

Figure 12-1 Using a Routing Sheet with Autonomy WorkSite



12-1-1 Creating a Routing Sheet using FileSite

1. Open Microsoft Outlook and locate FileSite in the tree view.
2. Go to the document library into which you will route your document.
3. Import a scanned document in one of two ways:
 - In a folder, right-click on a document name. Then, select **Import Scanned Document with Copied Profile**.
 - Right-click on a folder. Then, select **Import Scan**.
4. Verify or enter **Profile** information. Then, click **Save**. The HP CR Client opens.

5. Select the **Create New Routing Sheet** option.

A Routing Sheet is generated with the destination information from the profile, and opens in your default PDF viewer.

6. Print the Routing Sheet and use it for scanning hardcopy documents. Optionally, save it for later use.

12-1-2Creating a Routing Sheet using DeskSite

1. Open Autonomy DeskSite.
2. Go to the document library into which you will route your document.
3. Import a scanned document in one of three ways:
 - In a folder, right-click on a document name. Then, select **Import Scanned Document with Copied Profile**.
 - Right-click on a folder. Then, select **Import Scan**.
 - Open the **File** menu. Then, select **Import Scan**.

4. Verify or enter **Profile** information. Then, click **Save**. The HP CR Client opens.

5. Select the **Create New Routing Sheet** option.

A Routing Sheet is generated with the destination information from the profile, and opens in your default PDF viewer.

6. Print the Routing Sheet and use it for scanning hardcopy documents. Optionally, save it for later use.

12-2Creating a Scan Reservation in Autonomy WorkSite

A **Scan Reservation** is the instruction to submit electronic or hardcopy documents to HP CR for uploading to the WorkSite repository where they are stored in the appropriate location. The **Create Scan Reservation** option creates a WorkSite placeholder. When a Personal Distribution is selected from the device, the document scans to that placeholder.

12-2-1Creating a Scan Reservation using FileSite

1. Open Microsoft Outlook and locate FileSite in the tree view.
2. Go to the document library into which you will route your document.
3. Import a scanned document in one of two ways:
 - In a folder, right-click on a document name. Then, select **Import Scanned Document with Copied Profile**.
 - Right-click on a folder. Then, select **Import Scan**.

4. Verify or enter **Profile** information. Then, click **Save**. The HP CR Client opens.

5. Select the **Create Scan Reservation** option.

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

6. You can use the **Personal Distributions** option on the HP device display panel to scan your hardcopy documents. Or, use the HP CR Client to scan electronic documents and send them to Autonomy WorkSite for storage.

12-2-2Creating a Scan Reservation using DeskSite

1. Open Autonomy DeskSite.
2. Go to the document library into which you will route your document.
3. Import a scanned document in one of three ways:
 - In a folder, right-click on a document name. Then, select **Import Scanned Document with Copied Profile**.
 - Right-click on a folder. Then, select **Import Scan**.
 - Open the **File** menu. Then, select **Import Scan**.
4. Verify or enter **Profile** information. Then, click **Save**. The HP CR Client opens.
5. Select the **Create Scan Reservation** option.
 HP CR creates instructions with destination information from the profile, and displays a message when the scan reservation is created.
6. You can use the **Personal Distributions** option on the HP device display panel to scan your hardcopy documents. Or, use the HP CR Client to scan electronic documents and send them to Autonomy WorkSite for storage.

12-3Opening a document in the End User Interface

The **Open in the End User Interface** option submits an electronic document directly from the WorkSite client to the server.

12-3-1Opening a document using FileSite

1. Open Microsoft Outlook and locate FileSite in the tree view.
2. Go to the document library into which you will route your document.
3. Import a scanned document in one of two ways:
 - In a folder, right-click on a document name. Then, select **Import Scanned Document with Copied Profile**.
 - Right-click on a folder. Then, select **Import Scan**.
4. Verify or enter **Profile** information. Then, click **Save**. The HP CR Client opens.
5. Select the **Open in the End User Interface** option.
 The End User Interface opens with the **New Distribution** screen. The **Destination** section is filled with recipient information from the profile.
6. Create the message by attaching an electronic document(s). Select other recipients, as necessary.
7. Save the job as a new distribution, or send the message to the HP CR server for processing.

12-3-2Opening a document using DeskSite

1. Open Autonomy DeskSite.
2. Go to the document library into which you will route your document.
3. Import a scanned document in one of three ways:

- In a folder, right-click on a document name. Then, select **Import Scanned Document with Copied Profile**.
 - Right-click on a folder. Then, select **Import Scan**.
 - Open the **File** menu. Then, select **Import Scan**.
4. Verify or enter **Profile** information. Then, click **Save**. The HP CR Client opens.
 5. Select the **Open in the End User Interface** option.
The End User Interface opens with the **New Distribution** screen. The **Destination** section is filled with recipient information from the profile.
 6. Create the message by attaching an electronic document(s). Select other recipients, as necessary.
 7. Save the job as a new distribution, or send the message to the HP CR server for processing.

12-4 Sending a document directly to the HP CR server

1. Open DeskSite. Or, open Microsoft Outlook and locate FileSite in the tree view.
2. Go to the document library from which you will send your document.
3. Right-click on a document.
4. Select **Send to HP CR for Autonomy WorkSite**.
The End User Interface opens with the **New Distribution** screen. The **Destination** section is filled with recipient information from the profile and the document is attached. You can select other recipients, as necessary.
5. Save the job as a new distribution, or send the message to the HP CR server for processing.

13 Using the HP CR Mobile Client

13-1 HP CR Mobile Client

The **HP CR Mobile Client** supports on-the-go business users with versatile mobile document capture capabilities. Mobile Client users can capture and distribute documents directly from their device or cloud-based storage to any of their usual destinations (including Personal, Group or Preset distributions).

NOTE: Preset distributions on the HP CR Mobile Client can include any scan-to-self distributions (to MyFiles or routed directly to the user's email).

Users can also create **Mobile Reservations**, preparing a Mobile Scan Reservation Code for later use at an MFP inside or outside their business network. The system uses the Mobile Scan Reservation Code to appropriately distribute the submitted document information.

You can apply **Passwords** and available **Document Stamps** to .PDF messages and distributions in the Mobile Client from Document Delivery Options. Mobile Client users can also use the application to define alerts, receive notifications, and adjust settings.

The HP CR Mobile Client and Mobile Reservations are useful when working outside the office, during travel or whenever you need to import document information into your usual business workflow.

13-1-1 Requirements

The HP CR Mobile Client requires an iOS 6.x or higher mobile device.

You must download the Mobile Client application directly from the iTunes Store® to your device.

Server Administrators configure Mobile Client user availability. For more information on configuring the Mobile Client, refer to the [HP CR on-line documentation](#).

13-1-2 Sending a distribution from your device

1. From your mobile phone or tablet, select **Auto Login** (enabled by default) to log in to your corporate HP CR account (only required the first time).
2. Select a Personal, Group or Preset distribution to which to send your documents, or create a new one.
3. Attach your documents or images (from anywhere accessible via your smartphone or tablet).
4. For documents delivered as .PDF only, you can apply a password or Document Stamp in **Document Delivery Options**. Document Stamps are authorized by your System Administrator for specific user groups.
5. Press **Send**.

13-1-3Creating a Mobile Scan Reservation

A Mobile Scan Reservation lets you prepare a document for future, rather than immediate, scanning and distribution.

1. From your mobile phone or tablet, log in to your corporate HP CR account (only required the first time).
2. Select a Personal, Group or QuickUse distribution to which to send your documents, or create a new one.
3. Select the **Create Mobile Scan Reservation** option.
4. The system generates a Mobile Scan Reservation Code.
5. When convenient, the next time you are at a connected MFP, enter your Mobile Scan Reservation Code and scan your document. The distribution is delivered in the regular manner.

NOTE: Used Mobile Reservations will be removed from the server the next day. Unused Mobile Reservations will be removed at 14 days after being created.

Distributions that are referenced by a Mobile Reservation cannot be deleted until the linked reservation is cleaned up.

13-1-4Delivery notifications

The HP CR Mobile Client is integrated with the notification system of supported mobile devices. Users can receive notifications on the status of their distributions and Mobile Reservations. For example, notifications can confirm the arrival of scans at their destination or alert you to any delivery problems that occur.

13-2On-line help

Click the **Help** button at any time to access [HP CR on-line documentation](#).