# Sending a message to Concordance using AccuRoute Desktop

For detailed information on sending messages using AccuRoute Desktop, consult the user guide located at:
http://www.omtool.com/documentation/Accuroute/v22/AccurouteDesktop/AccuRouteDesktopV22UserGuide.pdf

To send a message to Concordance using AccuRoute Desktop:

1 Start AccuRoute Desktop. Click **START**, go to the Omtool programs group, and select **ACCUROUTE DESKTOP**. Log in if prompted. The application appears on your desktop.
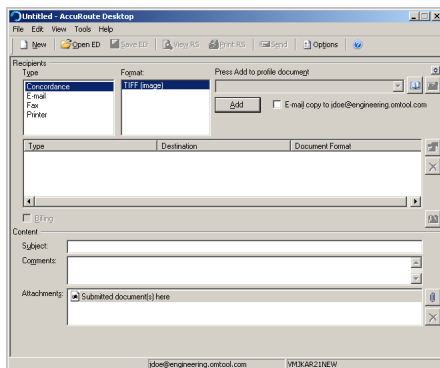
2 Select the destination type **CONCORDANCE** in the **RECIPIENTS TYPE** list. The only available file format is TIFF (image)

3 Click **ADD**. The Options window appears.
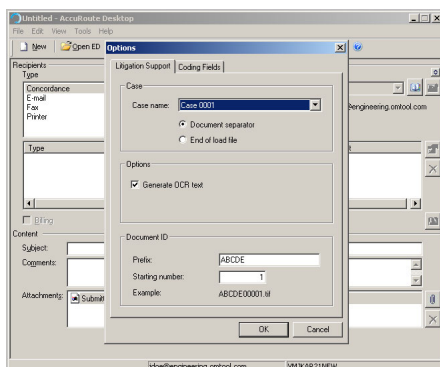
4 In the **CASE** section, select an available case from the drop-down list and select either **DOCUMENT SEPARATOR** or **END OF LOAD FILE**.

DOCUMENT SEPARATOR - This option generates a Routing Sheet that indicates the presence of a document. A document separator Routing Sheet must be placed in front of any document destined for Concordance.

END OF LOAD FILE - This option generates an End of Load File Routing Sheet, indicating that this message is the last message for the case. The end of load file Routing Sheet tells the Omtool server to finalize the load files and copy them from the working folder to the final folder.

The **Retain Routing Sheet in delivered document** option is automatically selected for an end of load file Routing Sheet.

▶▶ When you select **END OF LOAD FILE**, you cannot click **SEND** to send the message. You must send end of load file Routing Sheets through the standard network scanning process. If you have questions regarding the standard network scanning process, contact your network administrator.

5 In the **OPTIONS** section, select **GENERATE OCR TEXT** (optional). Selecting this option will create OCR text files in addition to the single page TIF files. OCR text files are searchable when imported into Concordance. If this option is not selected, only the single page TIF files are created, and the document is not searchable within Concordance.

6 In the **DOCUMENT ID** section, enter a **PREFIX** for the Document ID. The Prefix can consist of alpha characters, numerical characters, or a mixture. The limits of this field are controlled by the file system.

7   Enter a **STARTING NUMBER** or accept the default of 1.

In most cases, documents will be numbered starting with the specified number. If there is a document with a higher number already referenced in the load file, however, the starting number will begin at the next highest number.

The Prefix and starting number fields are added to the file name during the Compose process. For example if the Prefix is ABCDE and the Width is set to five, the resulting file name will be ABCDE00001.tif. The starting number (in this example 00001) indicates the first individual file number of the single page files.

8   Click the **CODING FIELDS** tab (defined by your network administrator). All fields may not be available.
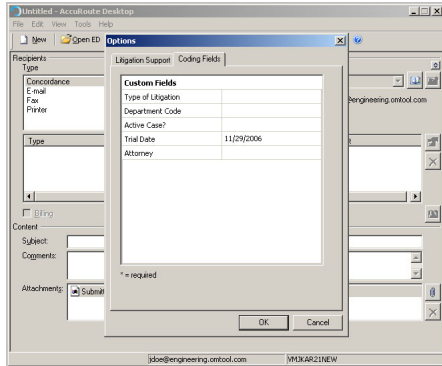
9   Enter information for any custom user-defined fields. If a field is required, you must enter information for that

field. There are five different types of data fields, see your network administrator if you have any questions.

String - If a custom user-defined field is defined as a string value field, you can enter alpha or numeric text.

Number - If a custom user-defined field is defined as a number field, you can only enter whole numbers.

Boolean - If a custom user-defined field is defined as a boolean field, select the check box if the answer is true, and clear the check box if the answer is false.

Date - If a custom user-defined field is defined as a date field, the field defaults to today's date. To change the date, click on the date, click the down arrow, and select the correct date from the calendar that appears
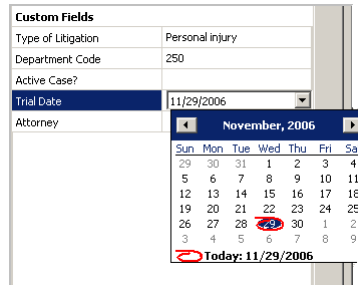
Pick - If a custom user-defined field is defined as a pick-list field, select a value from the drop-down list.

Depending on your system's configuration, you may be able to enter your own values.

Custom Fields	
Type of Litigation	Personal injury
Department Code	250
Active Case?	
Trial Date	11/29/2006
Attorney	
	B. Jones
	C. Smith
	D. Green
	E. Brown

10   Click **OK**. A Concordance destination appears in the message.

11   Add content to your message.

   a   Locate the **CONTENT** section at the bottom and type a subject and comments.

   b   Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:

        FILE - Select this option to attach a file saved from your computer or network share. Go to the file, select it, and click **OPEN**. The file appears in the attachments list.

        WEB DOCUMENT - Select this option to attach a web page from the Internet. Type the address of the web document, choose a file name for the attachment,

select a file format for this attachment (such as PDF or HTML), and click **OK**.

12   Do any of the following:

        Send the message immediately - Click **SEND** on the toolbar. A message box indicates that your message has been sent to the server. (Your message must have at least one attachment.)

        Save the message as an Embedded Directive - Click **SAVE ED** on the toolbar, type a title for the Embedded Directive, and click **SAVE**.

        Print a Routing Sheet that can be scanned with hard copy documents - Save the message as an Embedded Directive. Then click **PRINT RS** on the toolbar. AccuRoute Desktop creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your network administrator. (Your message can include both electronic and hard copy documents.)

13   Import the load files to Concordance. If you need assistance importing the load files, contact your network administrator.