upland AccuRoute

Embedded AccuRoute®
for Ricoh ESA v3.0
Quick Start Guide

upland AccuRoute

Upland AccuRoute

6 Riverside Drive

Andover, MA 01810

Phone: (978) 327-5700

Toll-free US: 1-800 886-7845

Upland Software Headquarters

Frost Bank Tower

401 Congress Avenue, Suite 1850

Austin, TX 78701-3788

Toll Free: (855) 944-7526

Upland AccuRoute Resources

The Upland Community

The Upland Community is the central hub for Upland customer information, in the community you can:

- · Track tickets

- · Search and Download Knowledge

- · Interact in Upland Forums

- · Stay up to date on AccuRoute and/or Upland News

Access the Community by logging in with your company email at:

https://community.uplandsoftware.com/hc/en-us

Customer Service and Technical Support Contact Information

- · Phone: (978) 327 6800 or (1-888) 303 8098

- · E-mail: omtool-support@uplandsoftware.com

- · Community: https://community.uplandsoftware.com/hc/en-us

NOTE: Technical support requires an active support contract. For more information go to:

https://uplandsoftware.com/accuroute/customer-success/support-overview/

Sales, Consulting Services, Licenses and Training

- · Phone: (978) 327 5700 or (1-800) 886 7845

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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.

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

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.

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.

3 The following types of information appear on the display:

- Device name and model

- Device IP address

- Device serial number

- Device location, if available

4 Optionally, press **Print** to print the screen information on the device.

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

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.

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.

Upland AccuRoute: 6 Riverside Drive, Andover, MA 01810, Phone: (978) 327-5700, Toll-free US: 1-800 886-7845
Upland Software Headquarters: Frost Bank Tower, 401 Congress Avenue, Suite 1850, Austin, TX 78701-3788, Toll Free: (855) 944-7526

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Using the Job Queue Option

You can use the **Job Queue** option to obtain a list of jobs recently submitted to the AccuRoute server from a specific multi-function printer (MFP). This is useful, for example, to check the status of jobs for which no notification occurs when complete.

Job Queue functionality depends on whether or not you are logged in as an authenticated user.

For all users, **Job Queue** can provide a list of all items previously scanned on an MFP, based on the serial number and IP address of that device. The system administrator configures the type of items or jobs that can be reported.

For authenticated users, **Job Queue** can list 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.
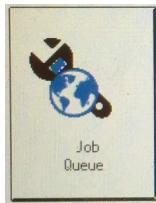
3   The following **Job Queue** properties appear on the display:

  - All faxes sent from this device

  - All scanned jobs from this device

4   Authenticated users will see the following **Job Queue** property on the display:

  - All my faxes

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

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.
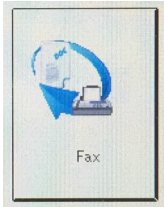
1 Assemble your document and go to the device.

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.

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**.

9 Press **OK** to return to the main AccuRoute page.
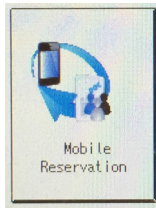
Using the Fax Option

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.

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

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.

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.

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

4   Enter your login credentials:

- 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**. 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 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.

9   Press **OK** to return to the main AccuRoute page.
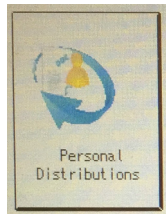
Using the Public Distributions Option

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.

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

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 SADF 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.

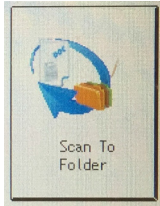**7**   Press **OK** to return to the main AccuRoute page.

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   Press **Scan to Folder** and the ready to scan page appears.

3   Load the document into the document feeder or place it on the exposure glass. (Use the exposure glass only if scanning a single page.)

4   Press **Start** on the hard keypad.

The device scans the document.

5   If the job build mode is on (**ScanSourceMode** is set to **SADF** in the configuration file or in the **Settings** screen), the following message appears.

▶ Depending on your device configuration, the screens that appear when your scan is complete may differ.

6   To scan additional pages, repeat the process.

7   When scanning is complete, press **#** on the hard keypad.

The device initiates a routing request and the following message appears.

8   To end the session and return to the main AccuRoute menu, press 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 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.