AccuRoute

Sending a Message

Using Open Text Document Management and AccuRoute Desktop (eDOCS DM)

Quick Start Guide

Upland AccuRoute
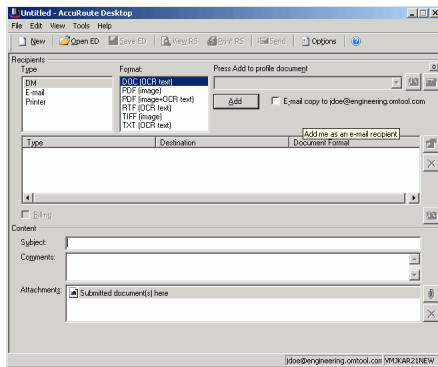1 Executive Drive
Chelmsford, MA 01824

Upland Software Headquarters
401 Congress Avenue, Suite 1850
Austin, TX 78701-3788, USA
833-875-2631

uplandsoftware.com

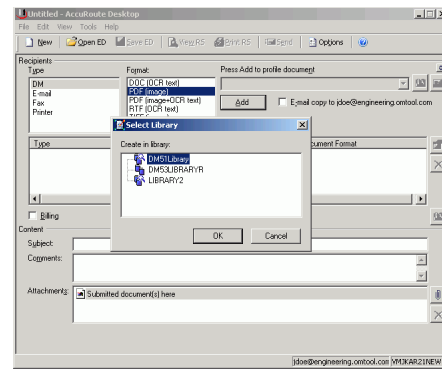# Sending a message to Open Text Document Management, eDOCS Edition (eDOCS DM) using AccuRoute Desktop

For detailed information on sending messages using AccuRoute Desktop, consult the user guide located at:
http://www.omtool.com/documentation/Accuroute/6.1/AccurouteDesktop/AccuRouteDesktopUserGuide.pdf

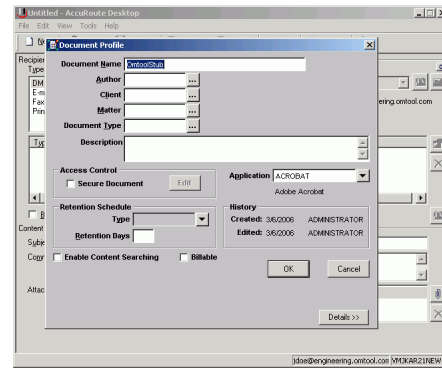**To send a message to Open Text Document Management, eDOCS Edition (eDOCS DM) using AccuRoute Desktop:**

1 Start AccuRoute Desktop. Click **Start**, go to the Upland AccuRoute programs group, and select **AccuRoute Desktop**. Log in if prompted. The application appears on your desktop.


2 Select the destination type **DM** in the **Recipients Type** list and select a file format for your message in the **Format** list.

For more information on the available file formats, consult the AccuRoute Desktop User Guide.

3 Click **Add**. The **Select Library** screen appears.

4 Select the appropriate DM library and click **OK**. The **Document Profile** screen appears.

For information on using billing, consult the AccuRoute Desktop User Guide or your system administrator.

5   Complete the **Document Profile** screen and click **OK**. The **Uploading document** screen appears.
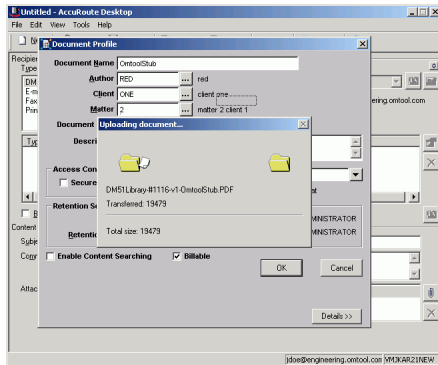
When the upload is complete, an OmtoolStub destination appears in the message.
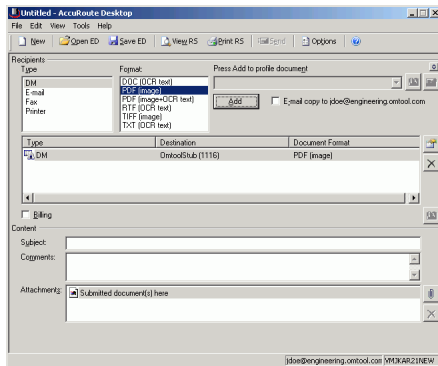
▸   When you create a Routing Sheet for Open Text Document Management, eDOCS Edition (eDOCS DM), AccuRoute creates a placeholder for the document. Never open, edit, or delete this placeholder.

6   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**.
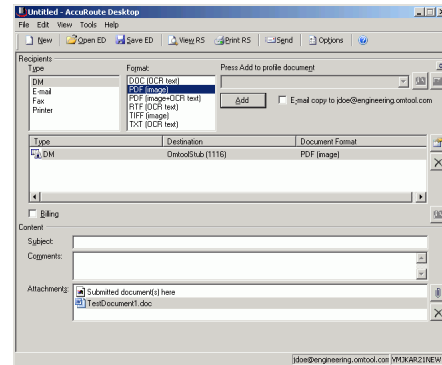
7   Do any of the following:

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.)