AccuRoute

Upload Scan and More

Using Microsoft SharePoint 2019 Extension and WebApps

Quick Start Guide

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About AccuRoute Extension for Microsoft SharePoint

An extension is software that extends the capabilities of stand-alone applications. The AccuRoute extension for SharePoint 2019 has been developed to enhance Web Apps and SharePoint functionality. Web Apps is used to upload and download documents to and from SharePoint. The integration of these applications enables Web Apps users to perform the following tasks.

- **Upload Scan** - (SharePoint)
    - **Advanced** > **Create Distribution** (Web Apps)
    - **Create Reservation** (Web Apps)
    - **Create Routing Sheet** (Web Apps)
- **Send to Web Apps** (SharePoint)
    - **Advanced > Create Distribution** (Web Apps)
    - **Send Using Existing Reservation** (Web Apps)

Note: The Upload Scan option appears in the SharePoint toolbar after your Administrator has completed the Web Apps SharePoint 2019 extension installation. Contact your Administrator if the Upload Scan option is not available.

Using Upload Scan

Upload Scan enables users to upload documents for scanning and create distributions.

Accessing Upload Scan

You can access Upload Scan by using the SharePoint Library > Files tab.

1 Open **Microsoft SharePoint**.

2 Select the appropriate document library.

3 Select **Files**. The Upload Scan button appears in the toolbar.

4 Select **Upload Scan**.

   Note: These steps identify the document library you will be using to upload documents as part of the destination information needed by Web Apps.

   You may need to log in on the SharePoint User Login details page the first time you select Upload Scan.

Specifying document name, format, and metadata

5 Type the document name in the **Name** box. This initial document name is a place holder for documents (attachments) that you will be uploading to SharePoint.

6 Select a format on the **Format** drop-down list; for example, PDF.

7 Type the metadata values in the appropriate boxes, if necessary.

8 Click **Save**. The Web Apps page appears with the Advanced, Create Reservation, and Create Routing Sheet options.

Using the Advanced, Create Reservation, and Create Routing Sheet options

Creating a distribution using Advanced

Use the **Advanced** option to create distributions for immediate or future uploads.

1   Complete the **Using Upload Scan** steps listed above.

2   Select **Advanced**. The Create Distribution page appears with the SharePoint library, document name, format, and metadata; if any, specified in the Destinations box.

3   **For immediate uploads**, use any of the following Attachment resources.

　　Attach File button in the Web Apps toolbar

　　Plus **(+)** icon at the end of the Attachments box

　　Drag and drop documents to the **Attachments > Submitted documents here** box.

4   Specify additional parameters, if necessary.

5   Click **Save As** and name the distribution.

6   Click **Send** to upload the attachments to the SharePoint document library, document name placeholder, and other parameters specified in your distribution.

　　For future uploads, select **Save As** and name the distribution.

　　All distributions created are categorized by date and time (default) and saved to My Distributions for use at any time.

　　Note: In this scenario, you are only saving the destination information for future uploads without any attachments or other parameters specified.

Creating a reservation

Use the Create a reservation option to create a distribution reservation (placeholder) for future uploads only. The Create a reservation option enables Web Apps to process your distribution information and automatically save it to My Distributions. The Scan Reservation created message appears when your distribution information is processed.

Note: The Create Distribution page is not displayed in this scenario. The processing is managed by Web Apps based on the document library selected, document name and metadata provided.

1   Complete the **Using Upload Scan** steps listed above.

2   Select **Create Reservation**.

　　Web Apps processes the document library selected, document name, and metadata provided. No attachments and other parameters are specified when this option is selected. The Scan Reservation created message appears.

3   Ensure the distribution appears in **Web Apps > My Distributions**.

Creating a routing sheet

Use the Create New Routing Sheet option to create a routing sheet that enables Web Apps users to scan hard copy documents from any scan-enabled device. The documents are submitted to the server for processing and routed to SharePoint based on the routing sheet instructions.

1 Complete the **Using Upload Scan** steps listed above.

2 Select **Create Routing Sheet**. Web Apps processes the document library selected, document name, and metadata provided. No

attachments and other parameters are specified when this option is selected. The routing sheet opens in your default PDF viewer.

3 Print the routing sheet and save for future use.

Note: The document library and name specified as the destination are shown below the Routing Sheet > Filing heading.

Sending SharePoint documents to Web Apps

Use the Send to Web Apps option to select SharePoint documents that exist in your document library and send to Web Apps. You can then use Web Apps to create distributions to other destinations or send to an existing reservation.

1 Open **Microsoft SharePoint**, if necessary.

2 Select the appropriate document library.

3 Find the document you want to send to Web Apps.

4 Select the Ellipsis icon **(...)** next to the document name. The document's details shortcut menu appears.

5 Select the Ellipsis icon **(...)** next to Follow option. The Download and more options menu appears.

6 Select **Advanced**. The Shared With and more options menu appears.

7 Select **Send to Web Apps**. The Web Apps > Select an option to proceed page appears.

Send to Web Apps > Creating a distribution using Advanced

Use the Advanced option to create a distribution to other destinations external to SharePoint; for example, an email address or other resources you have access to.

1 Complete the **Send to Web Apps** steps listed above.

2 Select **Advanced**. The Web Apps > Create Distribution appears with the SharePoint document selected as an attachment.

3 Use the Plus **(+)** icon next to the Destinations box and specify your destination parameters.

4 Specify a subject, other attachments, comments, and email a copy to yourself and/or other party as a BCC recipient, if necessary.

5 Select **Save As** and name the distribution if you want to reuse.

6 Click **Send**.

Send to Web Apps > Send using existing reservation

1   Complete the **Send to Web Apps** steps listed above.

2   Select **Send Using Existing Reservation**. The Web Apps > Distributions > My Distributions page appears.

3   Select the appropriate distribution on the list. The SharePoint document is automatically attached to the distribution.

4   Click **Send**.