AccuRoute

Profiling Documents

Using iManage Work Web and AccuRoute Desktop

Quick Start Guide

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Using AccuRoute Desktop to Profile Documents to iManage Work Web

Every document has a profile, or a set of metadata associated with the document for easy identification and searching capabilities. Document Management System (DMS) users can use AccuRoute Desktop to create document placeholders or records on the iManage WorkSite servers so that scanned documents are routed to their appropriate records. This is known as profiling documents to the iManage WorkWeb user interface.
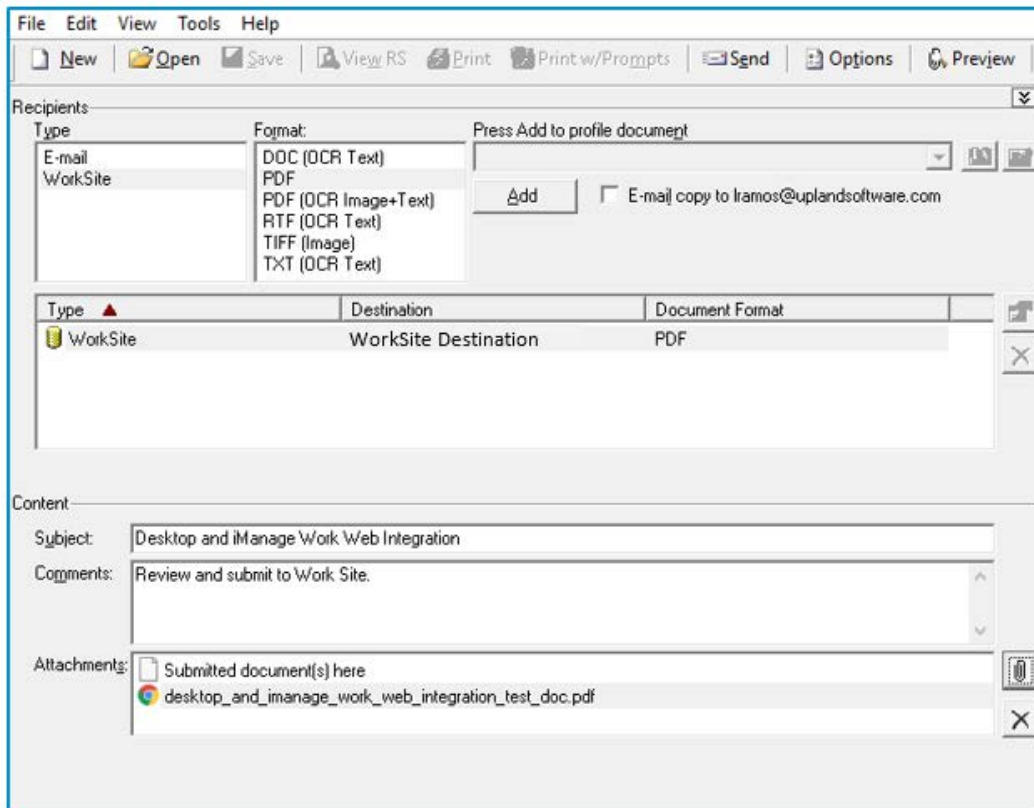
In addition, DMS users may need to configure AccuRoute Desktop for iManage WorkWeb integration. Contact your Administrator for additional information about configuring the AccuRoute Desktop for WorkWeb integration, if necessary.

Note: AccuRoute Desktop must be installed and configured on your desktop before you can profile documents to the iManage WorkWeb user interface.

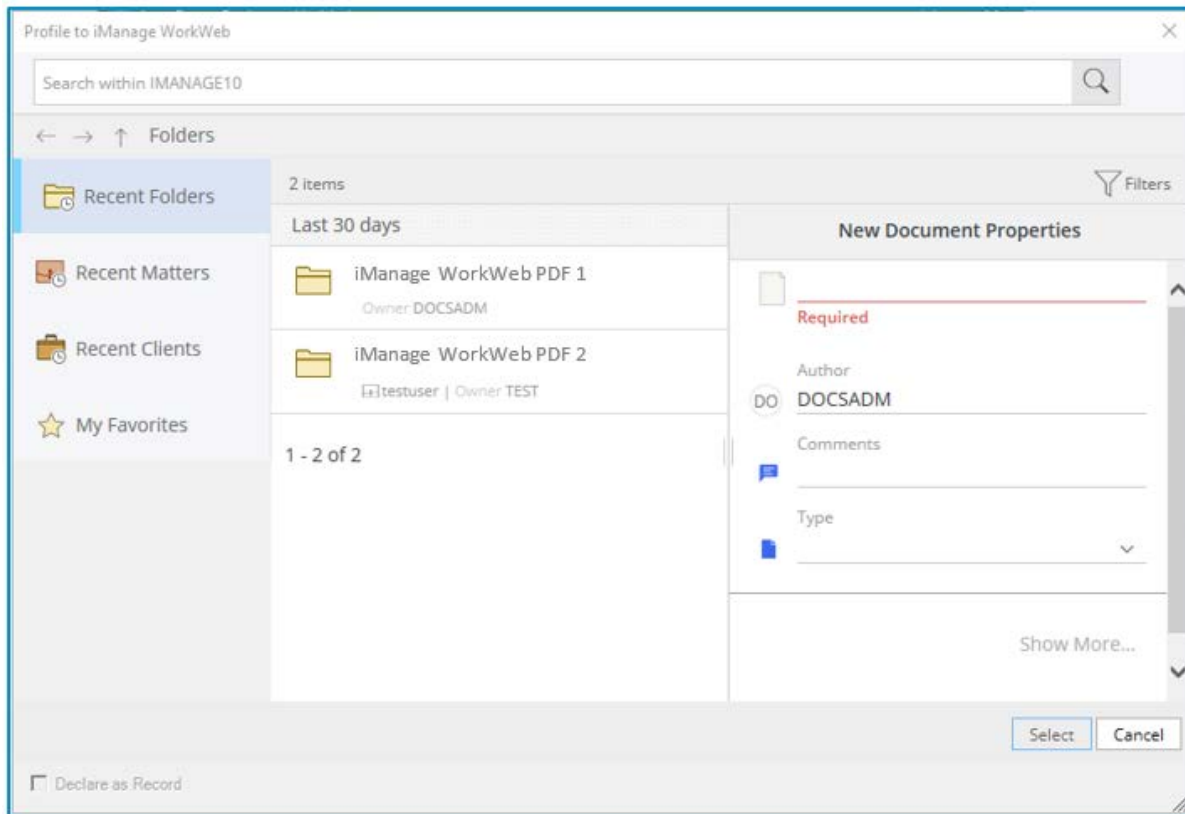**To profile documents to iManage WorkWeb using AccuRoute Desktop:**

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

2 Go to the **Recipients** area.

See the AccuRoute Desktop > Recipients and Content dialog box below.

3   In the Type column, select **WorkSite**.

4   In the Format column, select a document format; for example, PDF.

5   Click **Add**. The Profile to iManage WorkWeb user interface appears.

See the Profile to iManage WorkWeb user interface below.

6   Profile the documents using iManage WorkWeb and then go back to AccuRoute Desktop.

7   In the Content area, type a subject heading in the Subject box (optional).

8   Type comments in the Comment box (optional).

9   Use a Routing Sheet or attach the appropriate document.

10   Click **Send**.

See the AccuRoute Desktop Client User Guide for more information.