**AccuRoute**

Embedded Device Client Quick Start Guide

## About the Home Screen

The **Home Screen** is the visual interface displayed on a device that is used as your starting point. You can access options like the Routing Sheet, Distributions, Scan to Me and more. What you see on the Home screen is based on your document workflow configuration. This is set up by your System Administrator. Additional functionality displayed on the Home screen can be used to sign in, reset, and make copies of your documents.

**Note:** You must sign in before you can use the options displayed on the Home screen.

See the Home Screen example below.
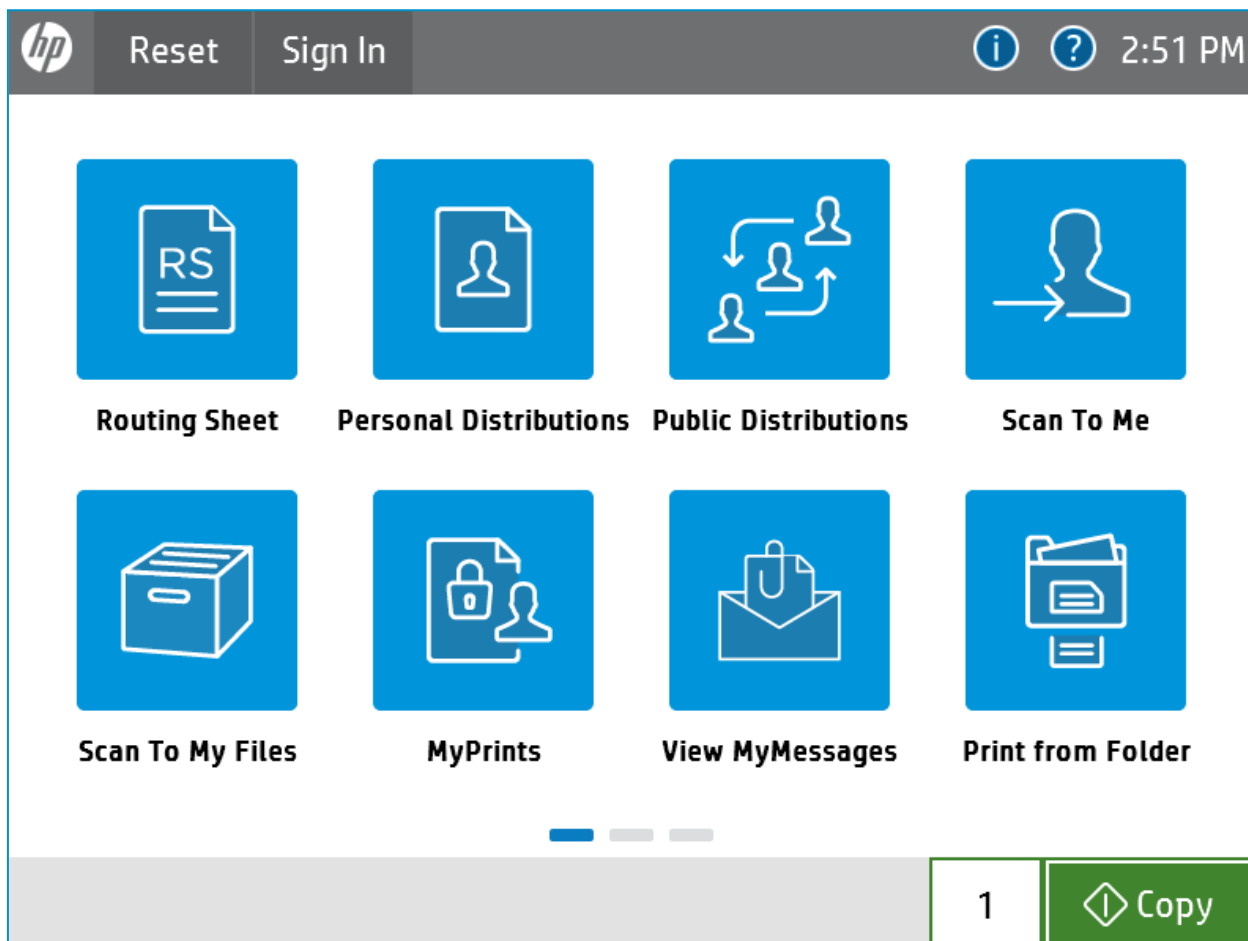


Instructions for using the Home screen options are available in this Quick Start Guide.

# AccuRoute

## Using the Routing Sheet Option

A **Routing Sheet** is a special page with a barcode 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 barcode and distributes the document to intended recipients.

1  Generate and print a Routing Sheet using theAccuRoute Desktop or WebApps Client.

2  Assemble your document with the Routing Sheetat the front.

3  At the device, load the document into the feeder orplace it on the exposure glass. (Use the exposureglass only if scanning a single page.)

4  Press **Routing Sheet**. (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.



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

If **one touch scan** is enabled, document scanning starts. Go to Step 7.

If **one touch scan** is NOT enabled (the default), the device shows the **Ready** message. Continue with the next step.

5  Optionally, press **More Options** to change scansettings (such as parameters for control over document routing and formatting).

6  Press **Start** to begin scanning. A progressindicator will display.

7  Wait for the job to finish. (Alternatively, press Cancel Job to stop the scan job.)

   When transfer is complete, a message indicatesthe job status.

8  To scan another document using the RoutingSheet option, press **Back**.

To end the session and return to the main AccuRoute menu, press Home 🏠 or the **OK** button.

**For Enhanced Routing Sheet Users only**

See **Using the Scan to Email Option** for more information.

## 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 document to the AccuRoute server, which decodes the distribution and sends the document to intended recipients.

**1** Assemble your document and go to the device.

**2** Press **Public Distributions**. (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.

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

**3** Select a distribution from the list of **Public Distributions**.

**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 using the same distribution, press **Back**.

To end the session and return to the main AccuRoute menu, press Home  or the **OK** button.

# Using the Personal Distributions Option

**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 an AccuRoute Personal Distribution. Ask your System Administrator for assistance.)

Using the **Personal Distributions** option, the device delivers the document to the AccuRoute server, which decodes the distribution and sends the document to intended recipients.

1  Assemble your document and go to the device.

2  Press **Personal Distributions**. (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.



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

3  If prompted, enter user login information to access your **Personal Distributions**.

4  Select a distribution from the list of your **Personal Distributions**.

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

6  Optionally, press **More Options** to change scan settings (such as parameters for control over document routing and formatting).

7  Press **Start** to begin scanning. A progress indicator will display.

8  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.

9  To scan another document using the same distribution, press **Back**.

To end the session and return to the main AccuRoute menu, press Home ⌂ or the **OK** button.

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## Using the Scan to Me Option

The **Scan to Me** option scans a document and delivers it to your PC for further review and routing. Based on a directive (a rule defined by a system administrator), AccuRoute sends the document to your e-mail address (the default) or to a Windows home folder.

Using the **Scan to Me** option, the device delivers the document to the AccuRoute server, which processes it using your personal directive and sends the document to intended recipients.

1  Assemble your document and go to the device.

2  Press **Scan to Me**. (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.



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

3  If prompted, enter user login information to access the **Scan to Me** option.

4  Press **Next**.

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

6  Optionally, press **More Options** to change scan settings (such as parameters for control over document routing and formatting).

7  Press **Start** to begin scanning. A progress indicator will display.

8  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.

9  To scan another document using the **Scan to Me** option, press **Back**.

To end the session and return to the main AccuRoute menu, press Home 🏠 or the **OK** button.

## 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   Press **Fax**. (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.
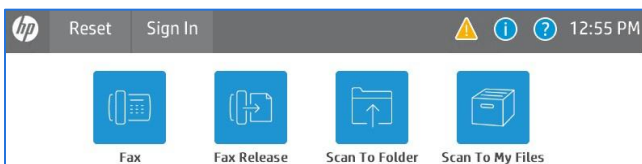


**Note:** The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

3   Press the **Fax Number** text box and enter the destination fax number using the keypad that opens. Press **OK** to close the keypad.

If you do not enter a fax number, you will get an error message.

4   To fax without adding a cover sheet, be sure the **Add Cover Sheet** option is not checked. Then, press **Next**. Continue with Step 5.

To add a cover sheet, press the **Add Cover Sheet** check box. Enter information in the **Sender Name**, **Recipient Name**, and **Subject** text boxes. Then, press **Next**.

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

6   Optionally, press **More Options** to change scan settings (such as parameters for control over document routing and formatting).

7   Press **Start** to begin scanning. A progress indicator will display.

8   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.

9   To scan another document using the **Fax** option, press **Back**.

To end the session and return to the main AccuRoute menu, press Home 🏠 or the **OK** button.

**For Enhanced Fax Users only**

The following message will appear if you select a group that contains email addresses instead of fax numbers for its members.

**"Fax recipient not found in the group."**

Use the Scan to Email option to scan your document to the group, if necessary.

See **Using the Scan to Email Option** for more information.

## Using the Fax Release Option

Using the **Fax Release** option, you can hold or release and print faxes as needed.

1  Select the **Fax Release** option. (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.



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

2  Select the **Fax Number** to which your faxes are sent.

3  As prompted, enter your PIN number on the **Enter PIN** page. (PINs are assigned by the system administrator.)

4  Select **Next**. The following options appear:

**Enable Manual Hold** – If you do not want to print faxes at this time, select this option to override the current print schedule assigned to the selected fax number.

For example, you may want to set **Manual Hold** when going to a meeting.

**Release Manual Hold** – Once Manual Hold is enabled, the **Release Manual Hold** option appears. Select this option to release and print all faxes held since Manual Hold was set.

**Print Pending Jobs** – Use this option to print all faxes held in the queue for the selected fax number. This includes any faxes received after normal business hours.

To end the session and return to the main AccuRoute menu, press Home  or the **OK** button.

# Using the Scan to Folder Option

Using the **Scan to Folder** option, the AccuRoute server sends the document to a folder predetermined by your system administrator.

## For Cloud Storage Folder Users

If you are a first-time user of the Scan to Folder option at the device, you will need to authenticate who you are by entering your login credentials and then authorize cloud storage access to your folders. You can authenticate and authorize at the device with the Scan to Folder option. If changes are made to your login credentials or access to the folders has expired, then you must reauthenticate and reauthorize at the device. The appropriate login and authorizing access screens will appear when authentication and authorization is required.

**Note:** This process applies to all AccuRoute supported MFP devices and cloud storage services.

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 Folder**. (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.



Your folder(s) appear on the device panel.

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

Icons indicate Folder status:

**Right-facing arrow** – The folder has sub-folders. Select the folder and a new list of folders appears for selection.

**Check mark** – The folder has no sub-folders. Select this item to route your scan directly to the folder.

**Red x mark** – The folder is not properly authorized (or an error occurred) and is unavailable until the issue is resolved.

4 Select the Folder to which you want to send your document or select **Create** to create a new Folder destination.

If **one touch scan** is enabled, document scanning starts. Go to Step 6.

If **one touch scan** is NOT enabled (the default), the device shows the Ready to Scan message. Continue with the next step.

**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**.

To end the session and return to the main AccuRoute menu, press Home  or the **OK** button.

## 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 or WebApps Client.

1 Assemble your document and go to the device.

2 Press **Scan to My Files**. (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.
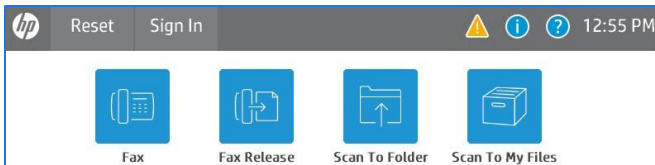


**Note:** The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

3 If prompted, enter user login information to access your **My Files** options.

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 using the same option, press **Back**.

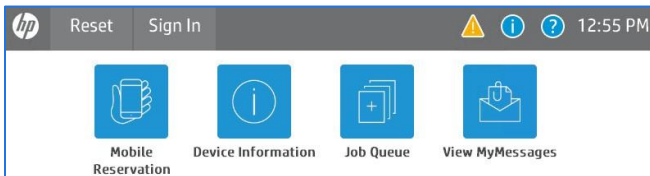To end the session and return to the main AccuRoute menu, press Home 🏠 or the **OK** button.

## Using the Mobile Reservation Option

Use the **Mobile Reservation** option to distribute 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.



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

You are prompted for your **Mobile Scan Reservation Code**. Enter the code generated by your Mobile Client.

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  Optionally, press **More Options** to change scan settings (such as parameters for control over document routing and formatting).

5  Press **Start** to begin scanning. A progress indicator will display.

6  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.

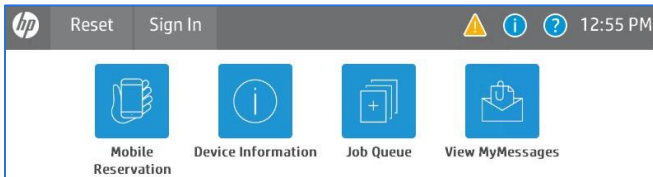7  To scan another document using the **Mobile Reservation** option, press **Back**.

To end the session and return to the main AccuRoute menu, press Home 🏠 or the **OK** button.

## 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 notvisible, find it using the scroll bar.)

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.

The following types of information appear on the display.

- Fax number

- Inbound/Outbound Fax supported

- Business Unit

- Device name

- Device Hostname

- Device IP address

- Device serial number

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

To end the session and return to the main AccuRoute menu, press Home  or the **OK** button.

# 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 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.
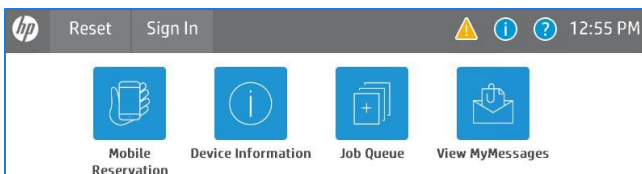


**Note:** The device button icons may vary, but the steps remain consistent. The example image is from an HP FutureSmart device.

The following **Job Queue** options appear on the display:

> **Faxes sent from this device** – Select this option to display a list only of fax jobs sent from this device.

> **All jobs from this device** – Select this option to display all the jobs sent from this device.

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

> **All my faxes** – Select this option to display all the faxes sent from the logged-in user.

3  Optionally, select a job listed by any of the above options and press **Print**. The details are printed on the device.
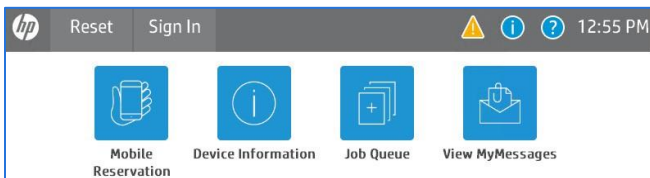
To end the session and return to the main AccuRoute menu, press Home 🏠 or the **OK** button.

![AccuRoute logo](U AccuRoute)

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## Using the View MyMessages Option

Use the **View MyMessages** option to view and/or print **Inbox** and **History** messages. Your System Administrator defines which message options are available to specific device users.

Once you are authenticated on the device, it communicates with the AccuRoute Server to display your own message list.

**1** Press **View MyMessages**. (If you do not see this option, find it using the scroll bar.)



**2** Enter your user credentials on the Authentication screen and press Login.

**3** Select either **Inbox** or **History**.

**4** Select the message of interest and press **View** or Print.

**5** If you pressed **Print**, wait for the job to finish. (Alternatively, press **Cancel Job** to stop the printjob.)

**6** To view or print another message, press **Back**.

To end the session and return to the main AccuRoute menu, press Home 🏠 or the **OK** button.

# Using the Scan to Email Option

Use the **Scan to Email** option to scan documents to one or more email recipients. You can search and look up email addresses by using your company's Address Book. You are required to sign in before accessing the Scan to Email and other options set up on your device by your System Administrator.

**Note:** This option may be available as an enhancement with other buttons on your device if configured by your System Administrator. The following instructions can be used wherever this functionality has been enabled. Scan to Email has its own button on the device but may appear with the use of other buttons.

1  Press **Scan to Email**.
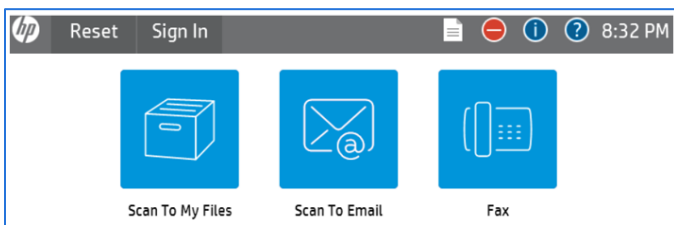


## Using Press to Add Additional Email

2  Select **Press to Add Additional Email**.
3  Type the recipient's email address in the **Email** box.
4  Type the first name and last name in the appropriate boxes.
5  Select **To**, **CC**, or **Bcc** on the **Type** drop-down list.
6  Select **Add**.
7  Repeat Steps 2 through 6 to add additional email addresses, if necessary.
8  Select **CC Me** if you want to send a copy to yourself.
9  Specify a subject in the **Subject** box.
10  Specify a message in the **Message** box.
11  Select **Next**.
12  Select **Delivered Document Name** and specify a new document name and select **OK**. (optional)
13  Select **Final Form Code**, choose a format on the **Final Form Code** list, for example, PDF and select **OK**. (optional)

**Note:** The document is sent using its default filename and format if you do not specify a Delivered Document Name and Final Form Code.

14  Select **Start**.

## Using the Address Book

1  Select **Address Book**.
2  Specify the following search criteria in the **Criteria** box.
   - Recipient name
   - Group name
   - Speed Dial number
3  Select **Go**.
4  Select the appropriate parameter on the Search Results list.

## Managing the Address Book

### Adding a New Entry
1  Select **Press to Add New Entry** to add other email recipients to your address book.
2  Select **Recipient** or **Group**.
3  If you selected **Recipient**, specify the recipient's email address, first name and last name in the appropriate boxes.
4  Select **OK**.
5  If you selected **Group**, specify a group name in the appropriate box.
6  Select **Members** and **Press to Select Recipient** or **Search** to add recipients from the list.
7  Select **OK**.

## Assigning Speed Dials to Email Addresses

A maximum of 99 Speed Dial numbers can be assigned to email addresses.

1  Select **Speed Dials**.
2  Select an [**unassigned**] Speed Dial number.
3  Type your search criteria in the **Criteria** box and select **Go**.
4  Select the appropriate recipient or group on the Search Results list.
5  Ensure the Speed Dial number contains the correct recipient or group.
6  Select **Back**.
7  Select **Done**.

**Note:** Use Speed Dial numbers to quickly access email recipients and groups and scan your documents. Select **Sort by Speed Dial** to sort your Search Results list, if necessary.

8  Use the **Back** and **Cancel** buttons to continue to scan or cancel scan jobs.

To end the session and return to the main AccuRoute menu, press Home ⌂ or the **OK** button.

## More about Scan to Email

The following message will appear if you select a group from your Address Book that does not contain email addresses for its members.

**"Email recipient not found in the group."**

This may occur if you selected a group that contains fax numbers instead of email addresses.

Use the Fax option to scan your document to the group, if necessary.