

Set-up Reference Topics

- ▶ **How can I view my email in Docu-Portal?**
- ▶ **I have a fax service in addition to Docu-Portal or a scanning program; how do I get those documents into Docu-Portal?**
- ▶ **I'm a Mac user; how do I install the Docu-Portal printer interface?**

▶ **How can I view my email in Docu-Portal?**

You can use the Workspace in the much the same way you would your e-mail Workspace. By forwarding your other e-mail accounts to either your Practice @myupdox.com address or your own @myupdox.com address, you can consolidate your e-mail with your other personal or practice work items.

To find your own @myupdox.com address, go to "Tools" in the top menu and select "My Profile". You will see the address at the bottom of the screen. You may use this default or edit it to your liking. Please copy it and follow the e-mail forwarding instructions in your other e-mail systems. You may also share this address with your contacts and have them send e-mail directly to this address.

To find your Practice @myupdox.com address, you will need to be the administrator of the Docu-Portal account. It is found under "Admin" in the top menu, under "Practice Profile". Please copy it and follow the e-mail forwarding instructions in your general practice e-mail system. You would use this as the forwarding address for any other fax or voice mail system you use that supports e-mail forwarding. You may also publicize this e-mail address as your general office e-mail address on your website or with other practice contacts.

Instructions for forwarding e-mail from common e-mail systems can be found by clicking on the following links:

- [Outlook 2003/2007 email forwarding](#)
- [Outlook Express email forwarding](#)
- [G-mail forwarding](#)

▶ **I have a fax service in addition Docu-Portal or a scanning program; how do I get those documents into Docu-Portal?**

If you use a fax line or scanner in addition to the fax number supplied by Docu-Portal (and elect not to forward it to the Docu-Portal fax number), you may still receive faxes and scanned items directly into Docu-Portal by the following method:

- Folder retrieval: Docu-Portal provides the capability to automatically forward the contents of a specific folder into the Workspace. Faxes and scanned items placed in this folder will automatically appear in the Workspace (under the "Files" header).
 - In Vista, it's C:\Users\UserName\SendToDocu-Portal.
 - In XP, it's C:\Documents and Settings\UserName\SendToDocu-Portal.

For other e-fax and scanning systems that save the documents on your PC or local network, follow the “How do I get a document or image into Docu-Portal?” answer above, under “For files on my computer or on my network”.

► **I’m a Mac user; how do I install the Docu-Portal printer interface?**

To install the Docu-Portal Printer (you must first be logged into Docu-Portal):

For OS X

1. *Open System Preferences and select the Print & Fax option*
2. *Click the + button to add a printer*
3. *Select the IP printer option*
4. *Enter the following settings*
 - *Protocol – **Internet Printing Protocol - IPP***
 - *Address – **localhost:22222***
 - *Queue – *leave blank**
 - *Name – **Docu-Portal Printer***
 - *Location – *leave blank**
 - *Print Using – **Generic PostScript Printer***
5. *Click the Add button*