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# KwikTag V6 Technical Information



**Microsoft Partner**  
Silver Application Development

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## Contents

Introduction: What is KwikTag? .....	3
Technical Definitions.....	4
KwikTag V6.....	4
The KwikTag Appliance.....	4
Frequently Asked Technical Questions .....	5
KwikTag Appliance .....	5
What are the advantages of the KwikTag Appliance? .....	5
Can I move from Hyper-V to VMware in the future?.....	5
Is KwikTag based on SharePoint?.....	5
File Storage, Back-up and Recovery .....	6
What are my options for backing up the Appliance?.....	6
How do I handle disaster recovery of the Appliance? .....	6
If we purchased Appliance hardware from ImageTag and have a hardware failure, what is the SLA for response/repair? .....	6
Can I use our SAN or NAS to store documents or do they have to be located on the same hardware as KwikTag? .....	6
What if I run out of storage space? .....	6
KwikTag Platform.....	7
On what technology is KwikTag built? .....	7
On what technology is KwikTag's end-user client built and what browsers does it support?.....	7
Does KwikTag run in a "Cloud" environment? .....	7
Does KwikTag run on mobile devices/Smart Phones?.....	7
KwikTag Compatibility, Scanners and Software Versions Supported.....	8
What versions of Microsoft Dynamics GP, SL, NAV and AX does KwikTag currently support? .....	8
KwikTag Professional User Clients.....	9
What versions of Microsoft Office Suite does KwikTag currently support? .....	9
Does KwikTag work when the Microsoft Dynamics Client is running on Citrix or Terminal Server? .....	9
Active Directory.....	9
Does KwikTag currently support Active Directory? .....	9
Scanning and Multi-Function Devices .....	10
Does KwikTag work with the scanners and multi-function devices I currently have? .....	10
Does ImageTag recommend a particular scanner or multi-function device or brand?.....	10
Can KwikTag read barcodes other than the KwikTag pre-printed labels?.....	10
Other than scanning, how can documents get in to KwikTag? .....	10

KwikTag Security .....11

- How does KwikTag document security work? .....11
- What are groups?.....11

KwikTag Licensing and Integration .....12

- Is KwikTag’s licensing named or concurrent? .....12
- Does KwikTag come with an operating system license?.....12
- Can I use my own SQL Standard or Enterprise Licensing? .....12
- Does KwikTag require Web Services? .....12
- How does KwikTag actually integrate with Microsoft Dynamics GP, SL, NAV and AX? .....12

General KwikTag Questions .....13

- Does KwikTag support multi-currency or international installations? .....13

## Introduction: What is KwikTag?

KwikTag® by ImageTag is the market-leading powerful, practical and proven ERP-embedded transactional content management application and platform solution. Implemented in days and easy to use, KwikTag delivers powerful document imaging, content-based retrieval, instant audit, multi-document case management, workflow routing, approval and tracking.

Built on our innovative “tag first, scan later” document management system, KwikTag, the core document management system, was the first to integrate business process automation with Microsoft Dynamics ERP systems or it can serve as a stand-alone document management system of record across the enterprise. KwikTag is fully embedded in Microsoft Dynamics GP, NAV, SL and AX as well as a number of industry-standard ISV applications. KwikTag simplifies access to transaction-related documents in any business process. KwikTag excels at accounting processes such as purchase-to-pay, order-to-cash and expense management; as well as forms automation and document tracking for employees, vendors, partners and other paper-intensive relationships.

KwikTag streamlines processes and increases productivity while supporting disaster recovery. Years of experience creating comprehensive, yet cost-effective, solutions ensures KwikTag delivers value with a fast ROI and low cost of ownership. Its process and capture method is so unique that these innovations are protected by nine U.S. patents, as well as numerous foreign patents.

## Technical Definitions

### KwikTag V6

The release of KwikTag V6 includes a number new features (see the latest [Release Notes](#)), enhancements and additional mapping of KwikTag to multiple new forms within each of the Microsoft Dynamics ERP systems.

This release also adds some dynamic new feature sets that allow for a greater range of KwikApps to be developed for Forms Management, Payables Management, and Expense Management needs. This release also contains updates to our compatibility with various new versions of Microsoft Dynamics products. Given the ease of installation of KwikTag V6, both upgrades and the addition of workflow applications can be accomplished very quickly.

KwikTag can function as a stand-alone business process automation platform, or integrate with your ERP system and is truly the ONE SYSTEM for any document, any department, any process.

For additional details refer to product sheets at <http://www.kwiktag.com> or contact your account representative or [sales@imagetag.com](mailto:sales@imagetag.com).

Need help now? Simply submit a support ticket by sending an email to: [support@imagetag.com](mailto:support@imagetag.com).

### The KwikTag Appliance

The KwikTag Appliance is a pre-configured Microsoft Hyper-V™ or VMware® virtual environment delivered on a thumb drive for installation on your existing hardware, or pre-staged on hardware you purchase from ImageTag. Based on Microsoft technologies, this turnkey solution includes the components of the KwikTag system: application, database, repository, system services, DataGateway electronic and paper data and image processing engine, ERP, Web and administrative clients and integration services.

## Frequently Asked Technical Questions

### KwikTag Appliance

#### What are the advantages of the KwikTag Appliance?

The KwikTag Appliance is pre-configured, so it takes less time and effort for you to install the software when compared to installing and configuring Windows, SQL and IIS, for example, which could take up to a day. Because the appliance is virtual, you get all the advantages of virtual environments including maximizing hardware usage, ease of backup, maintenance, deployment portability, disaster and recovery planning. Virtual software is becoming an industry standard and is a good way to keep total cost of ownership low.

#### Can I move from Hyper-V to VMware in the future?

Yes, the KwikTag virtual appliance is compatible with both Hyper-V and VMware, so it is possible to migrate from one virtualization platform to the other. VMware has tools to convert files as well.

#### Is KwikTag based on SharePoint?

KwikTag was developed on Microsoft .NET and is not based on SharePoint. KwikTag stores meta-data within SQL Server and documents on a file-based KwikTag repository.

## File Storage, Back-up and Recovery

### What are my options for backing up the Appliance?

You have 3 choices:

1. use your current virtual backup solution using tools provided by virtual or back up vendors to back-up the entire KwikTag image
2. deploy your compatible backup agent allowing direct file system and database backup and restore capabilities
3. KwikTag is configured with a protected share allowing access for standard backup software to sweep SQL backups and the document repository.

If you configure KwikTag for storage of document images outside the Appliance virtual image, you back-up this file server location as you do normally, but will still need to back-up the KwikTag Appliance to back-up the meta-data database element.

### How do I handle disaster recovery of the Appliance?

Since it runs virtually, KwikTag is compatible with your existing VMware or Hyper-V strategy. We will work alongside your IT department to formalize a strategy for your business continuity needs, including additional DR- priced and licensed software and hardware as needed.

### If we purchased Appliance hardware from ImageTag and have a hardware failure, what is the SLA for response/repair?

Once the failure has been triaged by our support staff, we open a case with our supplier and they initiate an overnight replacement. This could take a single day, or 2 days depending on when the replacement order is received by our supplier (time of day) and the courier to delivery, depending on location.

### Can I use our SAN or NAS to store documents or do they have to be located on the same hardware as KwikTag?

The KwikTag Appliance can support both internal storage and network attached storage (NAS). SAN devices can be supported via a network share.

### What if I run out of storage space?

KwikTag supports flexible configuration so you can add additional repositories leveraging existing "off-Appliance" drive space in your infrastructure, including NAS and SAN.

## KwikTag Platform

### On what technology is KwikTag built?

KwikTag is built on Microsoft .NET and supports both REST and web services API sets.

### On what technology is KwikTag's end-user client built and what browsers does it support?

The KwikTag V6 version web client is built on Microsoft Silverlight. Browsers supported include all Microsoft Silverlight supported browsers.

Currently, we are working on developing our next generation web-based client based on HTML5. We are expecting a beta candidate of this client in late Q2, early Q3 of 2016. This will be a revamped, responsive design client.

### Does KwikTag run in a "Cloud" environment?

While KwikTag is architected to deploy in a Cloud or hosted environment (and we have customers who are deployed this way), we have not yet published standard deployment specifications. We are researching system communications requirements relative to the possible deployment scenarios (i.e. where Dynamics is hosted relative to the KwikTag system) to determine technical deployment recommendations and offer deployment support. Some customers may also want to deploy portions of KwikTag in the Cloud, specifically the data gateway, to receive and process documents in the Cloud with ultimate storage elsewhere or behind additional firewalls.

### Does KwikTag run on mobile devices/Smart Phones?

KwikTag workflow approval or rejection email process works with your email system on all major Smart Phone and portable device operating systems including Windows mobile, Apple iPhone/iOS, Android™ and devices. The KwikTag Silverlight browser client supports all browsers, however the KwikTag client was designed to work on a 13-inch screen or larger and doesn't currently scale well to screens below 7 inches. Future development may include KwikTag applications specifically designed for mobile functionality and devices.

## KwikTag Compatibility, Scanners and Software Versions Supported

### What versions of Microsoft Dynamics GP, SL, NAV and AX does KwikTag currently support?

KwikTag V6 currently supports the following versions of Microsoft Dynamics ERP solutions:

#### Microsoft Dynamics GP

- 10
- 2010 and R2
- 2013 and R2
- 2015 and R2
- 2016

#### Microsoft Dynamics SL

- 2011
- 2011 FP1
- 2015

#### Microsoft Dynamics NAV

- 2009 SP1 Classic and RTC
- 2009 R2 Classic and RTC
- 2013 and R2
- NAV 2015
- NAV 2016

#### Microsoft Dynamics AX

- 2009
- 2009 SP1
- 2009 RU2
- 2009 RU4
- 2009 RU7
- 2009 RU8
- 2012
- 2012 R2
- 2012 RU6
- 2012 R3
- 2012 CU8
- 2012 CU9

## KwikTag Professional User Clients

### KwikTag currently has the following ERP Professional Clients:

- o KwikTag Pro Client for Dynamics SL
- o KwikTag Pro Client for Dynamics GP

### What versions of Microsoft Office Suite does KwikTag currently support?

#### KwikTag currently supports the following versions:

- o Microsoft Office Suite
- o 2010 (32 and 64 bit)
- o 2013 (32 and 64 bit)

### Does KwikTag work when the Microsoft Dynamics Client is running on Citrix or Terminal Server? If so, how?

Yes. KwikTag is supported on both Citrix and Terminal Server platforms. Citrix application sharing may affect some features of KwikTag such as Drag and Drop. KwikTag integrates using the Microsoft Dynamics default installation directory.

**Please see the Licensing and Integration section of this document for more information about Microsoft Dynamics and the KwikTag Technical Supplement for Microsoft Dynamics NAV document for additional information about integrating KwikTag with NAV.**

## Active Directory

### Does KwikTag currently support Active Directory?

KwikTag has a single sign-on configuration that can leverage Active Directory users and groups. Also, you can leverage Active Directory users and groups to speed your configuration of KwikTag.

## Scanning and Multi-Function Devices

### Does KwikTag work with the scanners and multi-function devices I currently have?

Yes. KwikTag generally works best with medium to high-end desktop models or hallway all-in-one scanners. KwikTag's data and image processing engine (called eGate™) works by monitoring the output of scanning devices (SMB/FTP/Email/Fax). This enables KwikTag to work with a wide variety of devices that can produce files with the following attributes:

- o Multi-page TIF or PDF, color or black and white
- o Sufficient resolution to read a barcode (300 DPI)
- o Compression Type Group 3 or Group 4 CCIT Fax or none

Network attached scanners with Scan to FTP is preferred, but not required. Electronic documents are stored in their native format, and scanned PDF's can be received and retained in PDF format.

### Does ImageTag recommend a particular scanner or multi-function device or brand?

No, however we do recommend that you pay attention to those that have better-reviewed feeders. If you plan to scan in receipts with KwikTag using our KwikPaper® laminate pages, you should also consider scanners that are capable of scanning thicker pages. Also, as the "Scan to FTP" option is our preferred method, it helps to pay attention to this functionality when choosing a scanner. We can also configure the system to scan from a network drive or email.

### Can KwikTag read barcodes other than the KwikTag pre-printed labels?

Yes, KwikTag supports any standard barcode symbology including two-dimensional codes. KwikTag also has a cover sheet option, but recommends the KwikTag labels for cost and environmental concerns.

### Other than scanning, how can documents get in to KwikTag?

KwikTag supports drag and drop for electronic documents, as well as email in (with stripping of attachments if you do not want the email data saved), fax in, and direct import. Many options exist to enable your distributed locations, and to auto-populate indexing field data.

## KwikTag Security

In addition to the operating system security, the KwikTag application has been designed to meet the strict standards of HIPAA and is in use by many financial, government, and health care institutions. The Appliance will most likely be inside the corporate firewall on a private network, and the server only listens on necessary ports. If it needs to be public, there are options for encrypting communication. KwikTag security is designed to let you control access to your data based on your compliance requirements. This ensures that only authorized personnel can view particular documents and control the filing of new documents. The System Administrator's account is granted all rights and these rights cannot be changed or deleted. The System Administrator is responsible for:

1. Creating users
2. Creating groups to manage collection of users
3. Granting users and groups access
4. Managing security policies, for example password length, expiration and lockout
5. Defining the auditing of various document and system activities

## How does KwikTag security work?

KwikTag employs security at the document container and/or role level. The Administrator can conveniently define security at the ERP company security level through the use of KwikTag Sites.

## What are groups?

Groups are a collection of users, and each user inherits the rights of the group. Groups are the most efficient way to manage users' access to drawers. Any user added to a group automatically receives the drawer access rights assigned to the group. A newly created user is assigned to a default group. All users (except for the Administrator and the Guest accounts) must belong to at least one group. Users may belong to more than one group simultaneously. Users can be created from an Active Directory group using AD integration.

## KwikTag Licensing and Integration

### Is KwikTag's licensing named or concurrent?

KwikTag licensing is on a Named user basis. Each KwikTag Client license is issued for a specific number of users. Although the System Administrator may create as many users as desired, only the licensed number may be enabled; all others must be disabled. This allows for reassignment of licenses as staff members and/or users change.

### Does KwikTag come with an operating system license?

When you buy hardware with your KwikTag Appliance, a Windows Server 2008 R2 Standard license is included with KwikTag and the Appliance is pre-configured for Windows Hyper-V. Enterprise and Data Center licenses are compatible, and available for an additional charge with Appliance hardware purchases. The virtual version of KwikTag (i.e. hardware not purchased from ImageTag) requires a Windows Server 2008 R2 or Server 2012 R2 license. We have tested with retail, OEM and volume license types. If you are unsure where to purchase a Windows license, we recommend [neweggbusiness.com](http://neweggbusiness.com).

### Can I use my own SQL Standard or Enterprise Licensing?

Yes, you can use your own SQL Standard or Enterprise license, but there is no need as KwikTag includes SQL Server 20012 R2 Express Edition. The Express Edition is all that is required because the KwikTag database remains relatively small as it contains only the meta-data. The physical files are stored in a file system.

### Does KwikTag require Web Services?

KwikTag requires GP, AX or NAV Web Services only if the following workflow automation functionality is required: transaction auto-create, vendor look-up, or default GL distribution look-up.

### How does KwikTag actually integrate with Microsoft Dynamics GP, SL, NAV and AX?

The KwikTag embedded client is integrated into the Microsoft Dynamics menuing or toolbar functions and is aware of the user's context (i.e. module and form). Mapping information (i.e. how the form relates to KwikTag) is automatically accessed by the KwikTag embedded client. This extensible design enables customization through configuration rather than coding.

## General KwikTag Questions

### Does KwikTag support multi-currency or international installations?

KwikTag is not currently localized or internationalized, so formats are according to U.S. standards for dates and currency (USD for currency 0,000.00 with or without any currency/dollar symbol). KwikTag can be used outside of the U.S. if users are aware and comply with these formats. In addition, if you are using KwikTag to create a transaction within GP, you can select an alternate currency for the transaction when it is being created.

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