



dynamics ax client user guide

INTRODUCTION

KwikTag document imaging software transforms your business documents into digital images. It works the way you work, without complicated new processes and scanning operations. KwikTag files and retrieves your paper documents digitally and automates routing and approval workflows. This Guide is designed to provide an overview of the KwikTag for MS Dynamics AX Embedded Client capabilities and to enable you to start using KwikTag quickly.

Before getting started here is a brief overview of how you will use KwikTag:

Simple, Three-Step Process:

Step 1. FILE a Document

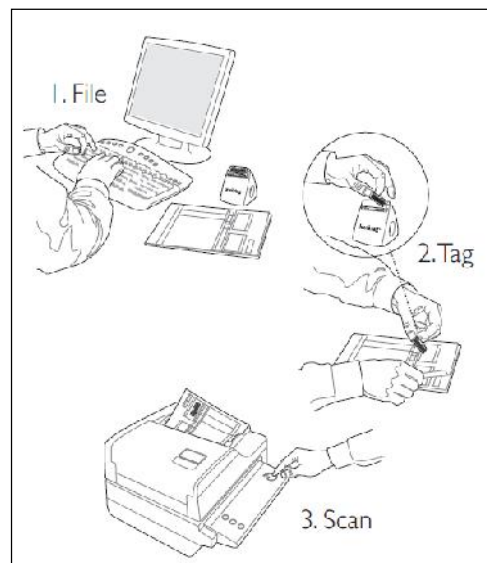
Enter filing/indexing instructions using KwikTag's client software.

Step 2. TAG a Document

From a KwikTag Label dispenser, tag the first page of the document. This globally unique and sequentially numbered barcode is automatically linked with the document's filing/indexing instructions. KwikTag verifies the next barcode number in your dispenser. Confirm the number and click "OK."

Step 3. SCAN Documents

When it is convenient, drop stacks of tagged documents into any scanning device that automatically sends them to the KwikTag server. KwikTag reads the barcodes, assembles the document pages and stores the document in the drawer where the file reservation was made in Step 1.



Alternately, Scan First

For users relying on KwikTag workflow for document routing and approval, this three-step process is somewhat reversed to facilitate tagging and scanning of documents first, followed by indexing and then routing and approval. Workflow users can choose to:

1. Tag a document as described above
2. Scan documents to be sent to the KwikTag server
3. File a document by entering indexing instructions into the computer from the KwikTag client. When this document is submitted by the indexer, it is then routed to a KwikTag approver based on pre-configured business rules.

Workflow processes will be addressed in this user guide in the Work Queue section.

Before getting started this is what you will require:

1. Access to a Web browser
2. A KwikTag Logon ID and Password (get this information from your company's KwikTag Administrator)

KwikTag 4.6.5x MS Dynamics AX Embedded Client User Guide

3. A KwikTag Label Dispenser and a roll of KwikTag Labels

This guide will show you how to get started using the KwikTag for MS Dynamics AX Embedded Client. Depending on your user license all of these features may not be available to you.

CONTENTS

Getting Started..... 5

How to File a Document 5

 Step 1: Filing a Document 5

 Step 2: Tagging a Document 5

 How to Tag a Paper Document – Option 1 5

 How to Tag an Electronic Document – Option 2..... 8

 Single Button Tagging 12

 Step 3: Scanning the Tagged Documents..... 13

Viewing a Document..... 13

 How to view from the ‘KwikTag’ window 13

 How to view from a “Places” screen in AX..... 15

Searching for a Document 16

The KwikTag AX Work Queue 20

 Tagging a Document from the Work Queue..... 20

 Creating a new AX Entry from the Work Queue 21

GETTING STARTED

The KwikTag AX embedded client provides options within Microsoft AX for associating a document (either a scanned paper document or an electronic file) with an entry in the ERP system. Users can associate or “Tag” a document during or after the process of creating the entry in AX.

Alternately, for users relying on KwikTag workflow capabilities for routing and approving documents, KwikTag can populate a new Microsoft AX entry using the ‘Create’ function. In this way, users can enter relevant information about a document from the KwikTag Web client, route the document for approval, then retrieve the approved document from within Microsoft AX. At that point, using the KwikTag embedded “Create” button within AX results in a new Microsoft AX entry without the need for additional data entry.

KwikTag workflow features are documented in the KwikTag Web Client User Guide. This document addresses steps for tagging documents within AX, creating new AX entries based on indexed data from approved KwikTag documents and searching for KwikTag documents within AX.

HOW TO FILE A DOCUMENT

STEP 1: FILING A DOCUMENT

1. When using the KwikTag for MS Dynamics AX Embedded Client (also called the KwikTag Window in this guide) you will enter the document information into the AX form window the same as you did prior to using KwikTag. This filing information is stored in a KwikTag Library with the same name as the AX Form Screen to which you are filing.
2. Prior to saving the information in a form go to ‘Step 2: Tagging a Document’

STEP 2: TAGGING A DOCUMENT

HOW TO TAG A PAPER DOCUMENT – OPTION 1

1. Click on the **KwikTag** button found in the lower right-hand side of the enabled form within Microsoft AX (Figure 1)

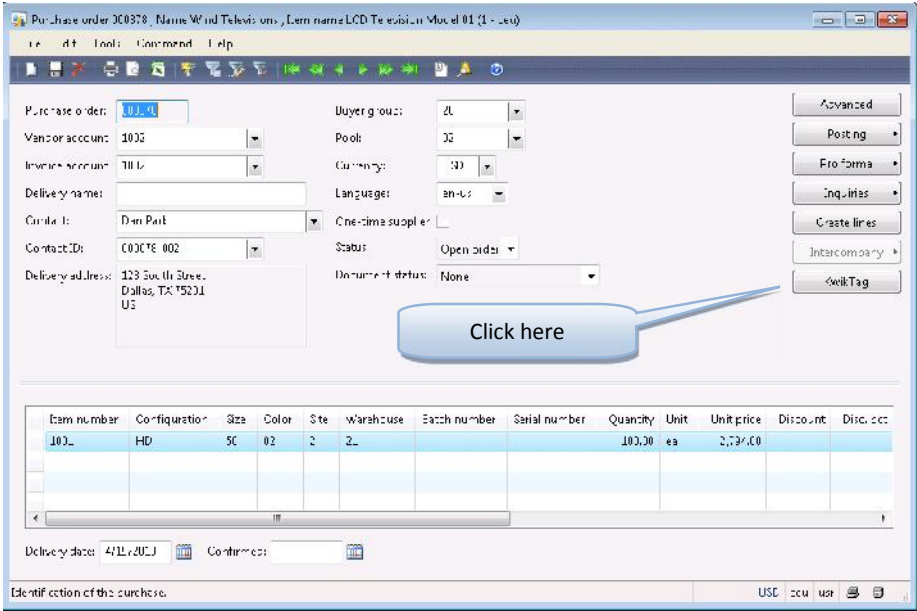


Figure 1

2. The KwikTag embedded client window will open (Figure 2)

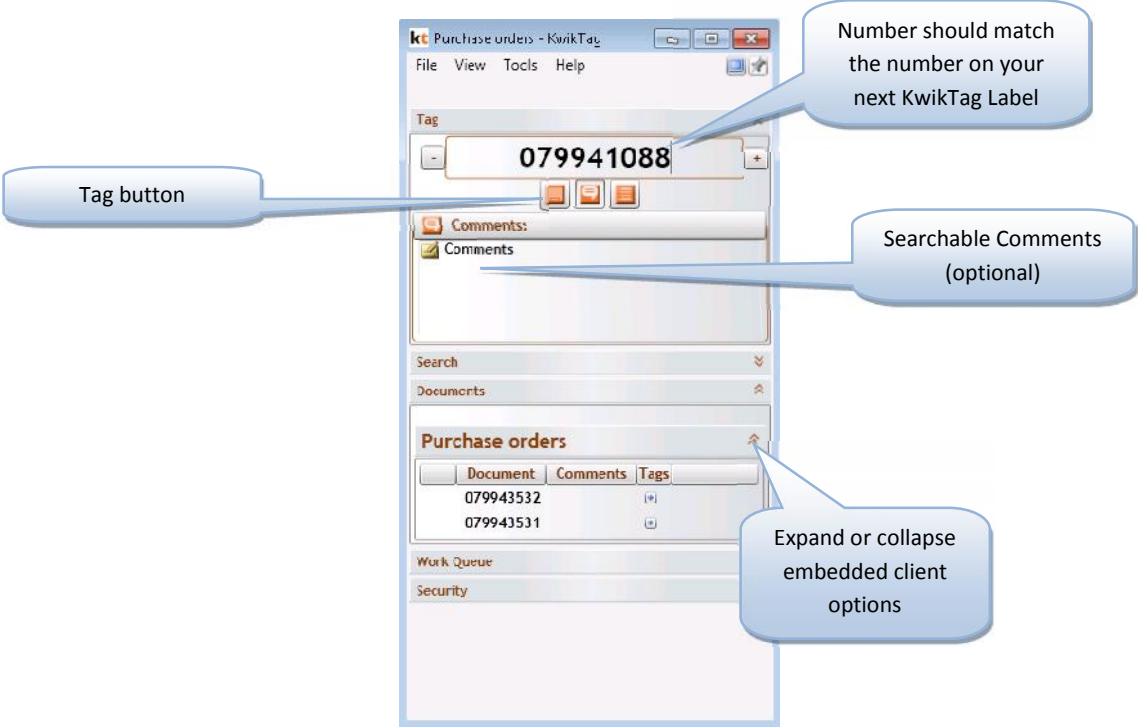


Figure 2a: KwikTag AX embedded client tag options

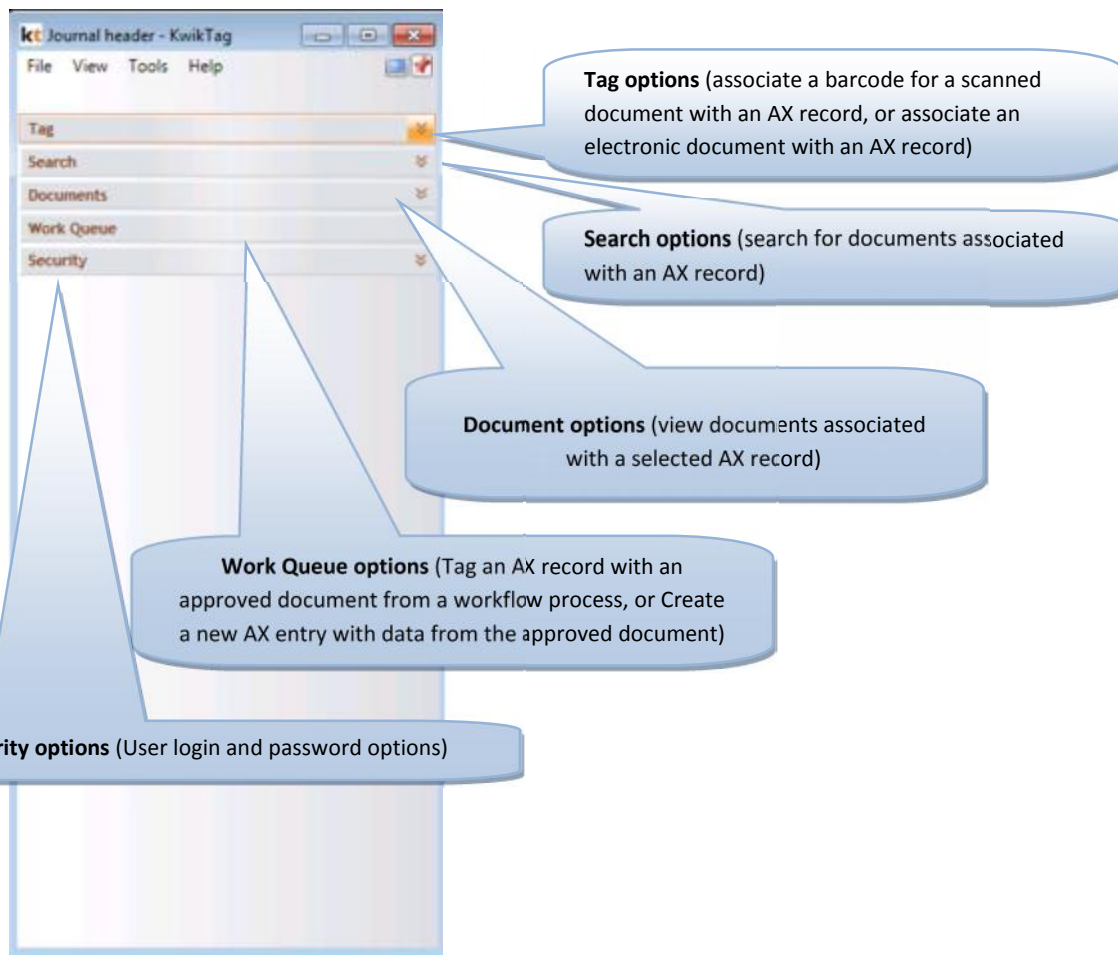


Figure 2b: KwikTag AX embedded client with collapsed menu options

Since the barcode number on the label from the KwikTag Label Dispenser ties the filing information (from Step 1: “Filing a Document”) with the physical document, it is imperative that the barcode number shown in the ‘KwikTag’ window matches the next barcode number on the label to be placed on the document in your KwikTag Label Dispenser. If it does not, use the (-)/(+) buttons or enter the 9 digit number to display your next barcode label.

Take the barcode label from your dispenser and place it on the document you are tagging. The label should be placed on white space and should not be along the edge of the document. If the document is more than one page, the barcode label should be affixed only on the first page.

3. Click the **Tag** button (Figure 2)

A confirmation message displays at the top the ‘KwikTag’ window. (Figure 3)



Figure 3

4. Remove any staples and/or paperclips and place the document in your KwikBasket to be scanned.
5. Complete processing the transaction in AX.

HOW TO TAG AN ELECTRONIC DOCUMENT – OPTION 2

Electronic documents are filed into AX the same as in Step 1 (“How to File a Document”) however, the process for tagging will differ. No KwikTag Label is required; KwikTag will generate a unique barcode number for the electronic document.

1. Click on the **KwikTag** button (Figure 4)

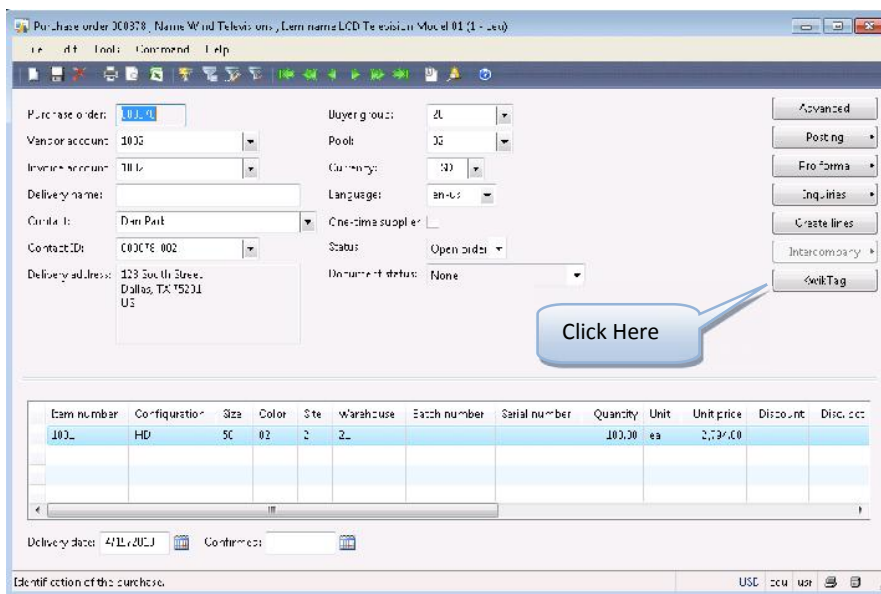


Figure 4

2. The 'KwikTag' embedded client window will open (Figure 5)

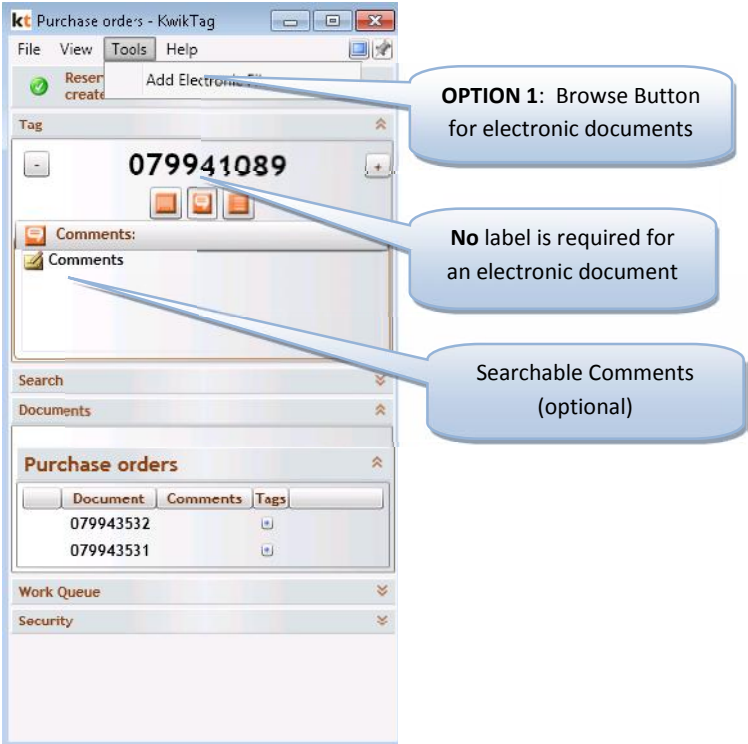


Figure 5

- 3. **OPTION 1 – BROWSE** to find the document:
 - a. Click on the **Tools Menu**, choose 'Add Electric File...' (Figure 5) and navigate to the location of the document. Double click on the document or select it and click **Open** (Figure 6)

KwikTag 4.6.5x MS Dynamics AX Embedded Client User Guide

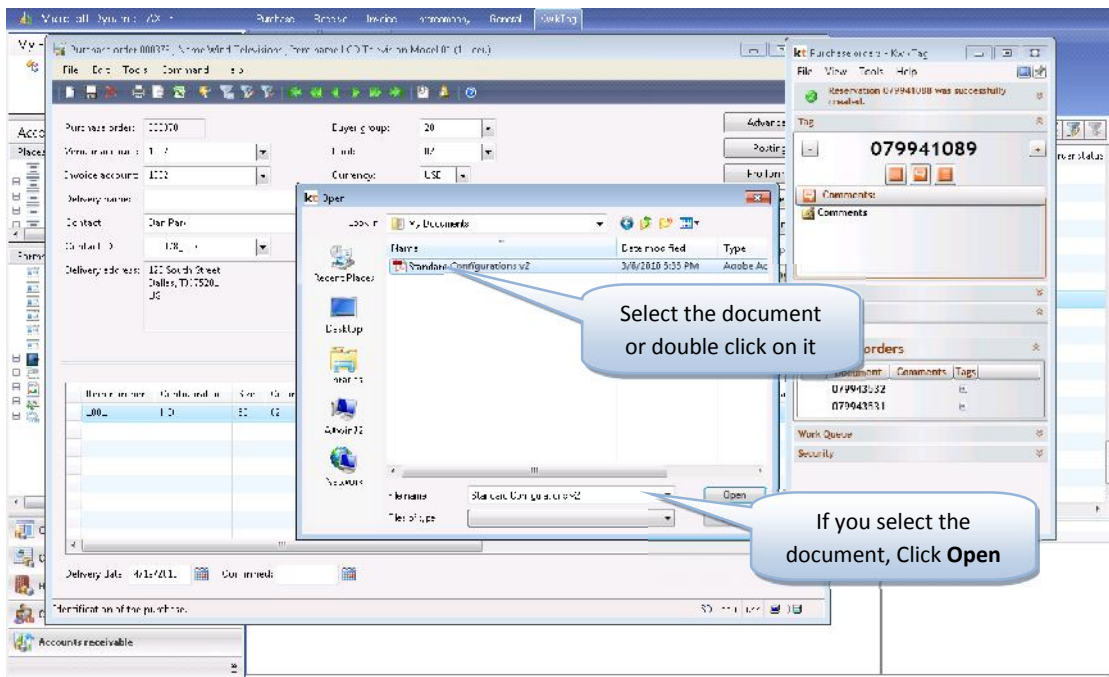


Figure 6

- b. A confirmation message displays at the top of the 'KwikTag' window. (Figure 7)



Figure 7

4. **OPTION 2** – DRAG and DROP (used to file emails):

- a. Drag the email to the 'KwikTag' window and release it. If the 'KwikTag' window moves to the background while you are dragging the email, simply drag it to the KwikTag application in the task bar (Figure 8). This will cause the 'KwikTag' window to reappear; continue to drag the email into the window and release it.

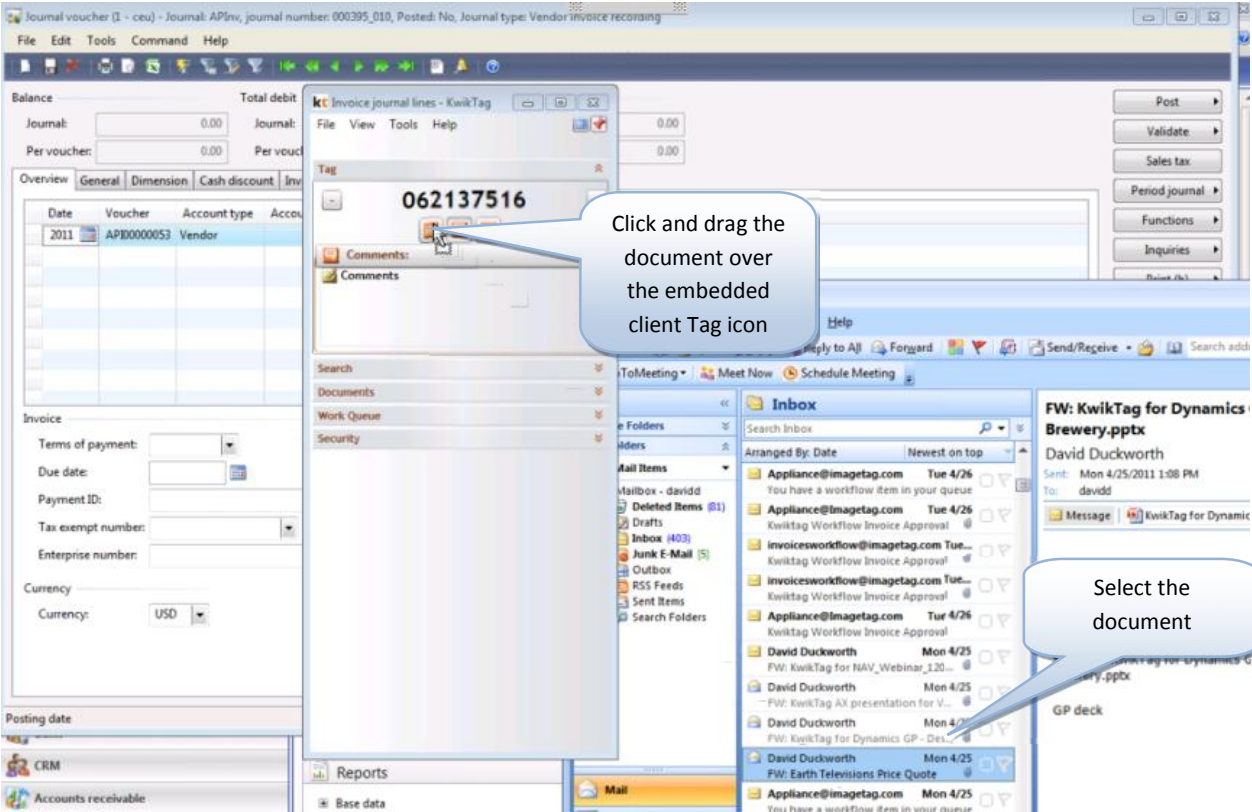


Figure 8

5. A confirmation message displays at the top of the 'KwikTag' window. (Figure 9)



Figure 9

6. Complete processing the transaction in AX.

SINGLE BUTTON TAGGING

For users who wish to review a journal in AX and quickly Tag, or create reservations for documents to be scanned, KwikTag offers the option of tagging documents from a single button within AX. From a header record, users can navigate to the KwikTag Tab in AX, which provides three options:

- **Tag:** tag a record in AX, creating a reservation for a document to be scanned with that barcode
- **View document:** View documents associated with a record in AX
- **KwikTag:** Launch the KwikTag embedded client for access to additional KwikTag features

To Tag a document from this view, complete the following steps:

1. Navigate to the KwikTag tab in AX and click the Tag button (Figure 10)
 - a. KwikTag will confirm the reservation with a pop-up window (Figure 11)

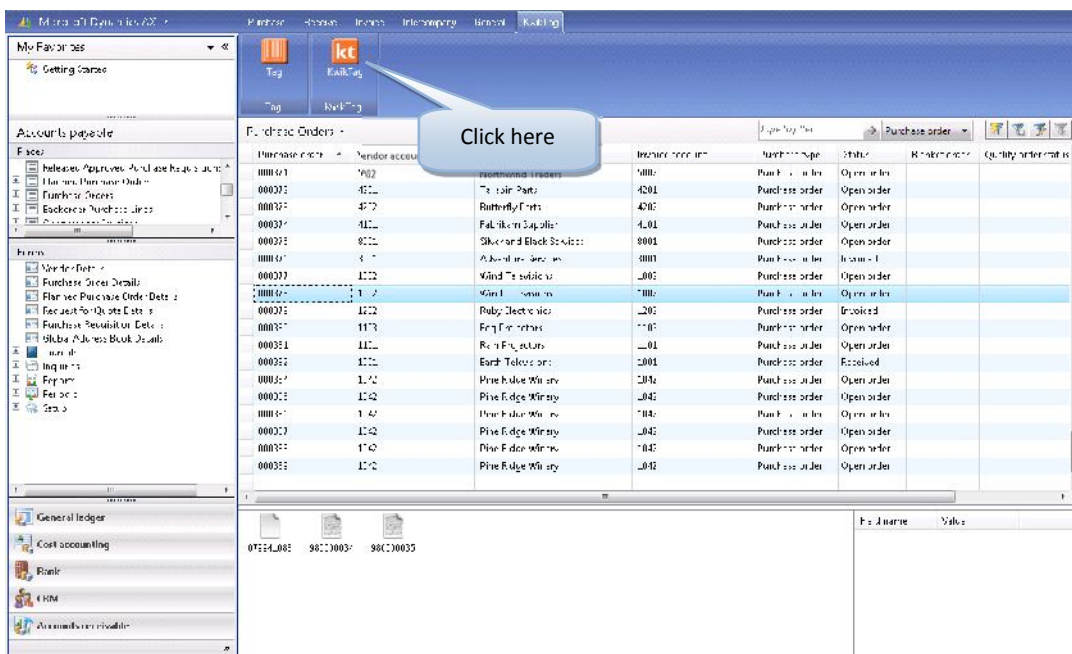


Figure 10

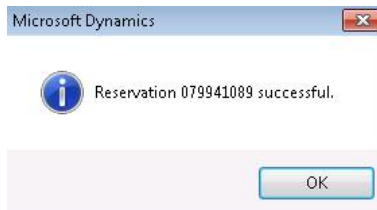


Figure 11

Documents and/or reservations for documents associated with an AX record may be viewed from the “Places” tray in AX, as seen in the Figure below (Figure 12). Viewing documents within AX will be discussed in more detail below.

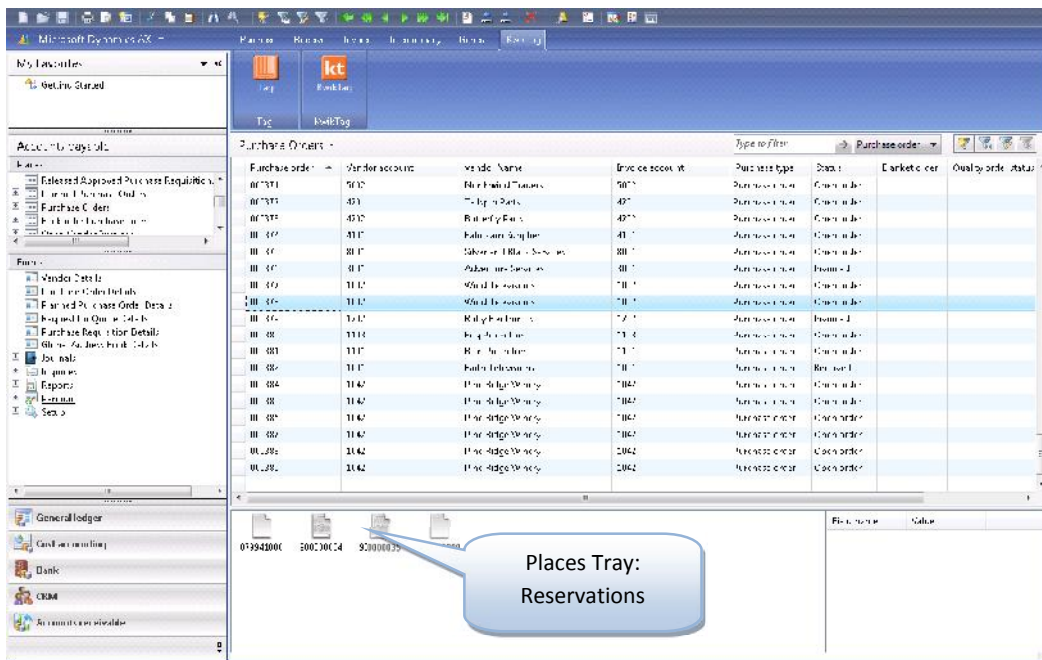


Figure 12: AX Places Tray and document reservations

STEP 3: SCANNING THE TAGGED DOCUMENTS

In the previous section, we discussed a variety of ways to Tag documents within AX in order to associate electronic documents with a record in AX, or to create a reservation for a physical document to be scanned and electronically associated with the record.

The final step to associate physical documents with KwikTag and AX is to scan the documents on a scanner that has been configured to scan to KwikTag.

Once documents have been scanned into the system, they can be viewed from within AX in a number of ways, as described below.

VIEWING A DOCUMENT

HOW TO VIEW FROM THE 'KWIKTAG' WINDOW

- 1) The KwikTag AX embedded client window includes a Documents section that displays all documents associated with the currently displayed AX form. (Figure 13)
- 2) Viewing a document:

You can view documents from the 'KwikTag' window by double clicking the document you would like to view.

or

Right click the document in the 'KwikTag' window and select **View Document**. (Figure 13)

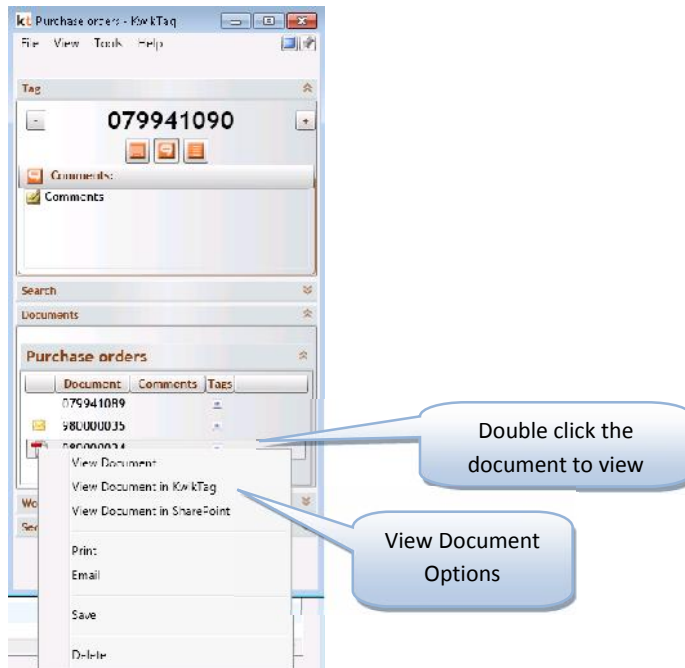


Figure 13

- 3) You can also choose to **'Email', 'Print', 'Save' or 'Delete'** the document directly from the 'KwikTag' window. Click on a document and then right click to view these options. (Figure 13)

If, when attempting to view a document you receive the following message (Figure 14):

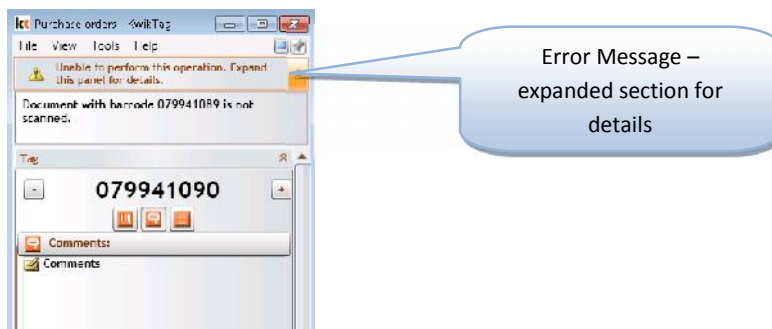


Figure 14

This indicates:

The document has not been scanned;

or

The document was scanned but the processing has not yet completed.

HOW TO VIEW FROM A “PLACES” SCREEN IN AX

As described above, the AX Places Tray within Microsoft AX provides the ability for users to quickly view icons that indicate that either a document reservation or an electronic document is associated with a record.

All documents associated with the currently highlighted AX form will be displayed in a window at the bottom of the “Places” screen. (Figure 15)

You can view a document from a “Places” screen in AX by highlighting the form and double clicking any document that is displayed in the window at the bottom of the screen (Figure 15);

or

By clicking the **View Document** button in the ‘KwikTag’ ribbon at the top of the screen (Figure 15).

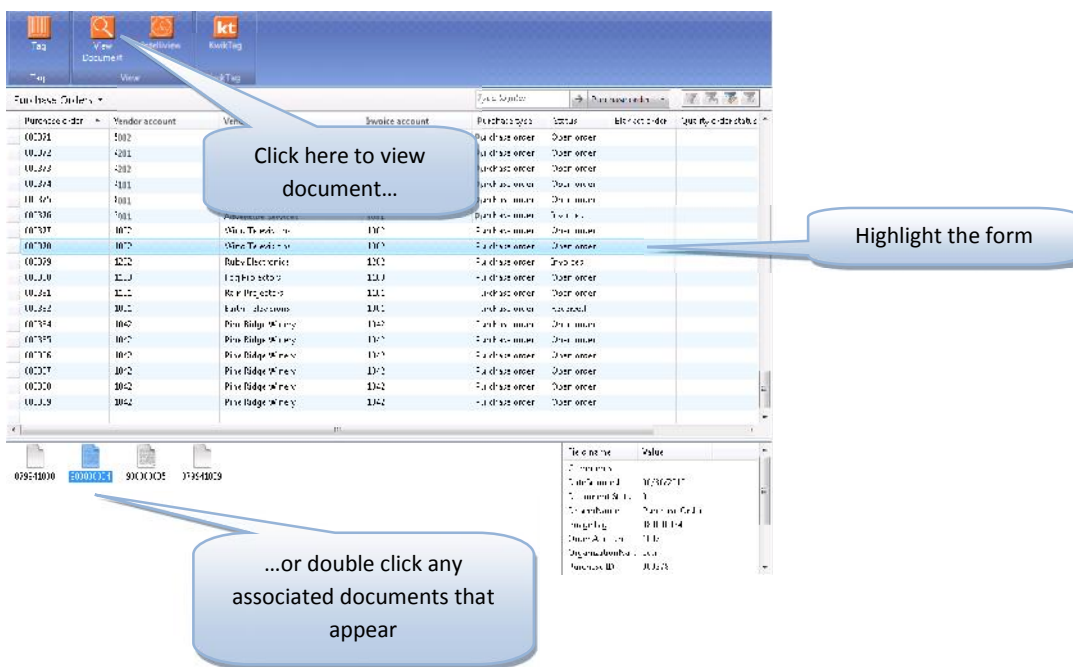


Figure 15

If nothing appears when you double click, this indicates:

1. The document has not been scanned;
- or
2. The document was scanned but the processing has not yet completed.

SEARCHING FOR A DOCUMENT

You can search for documents from any KwikTag Embedded client-enabled AX Form. To search for a document, follow the steps below:

1. Expand the 'Search' section of the 'KwikTag' window (Figure 16)
2. Enter the search criteria
3. Choose to search on the '**Filing Information**' data entered when filing the document in Step 1 ("How to File a Document");

or

Choose to search on the '**Document Content**' (NOTE: This is only available if the document was filed in a drawer that is set-up to store documents as PDF Image + Text).

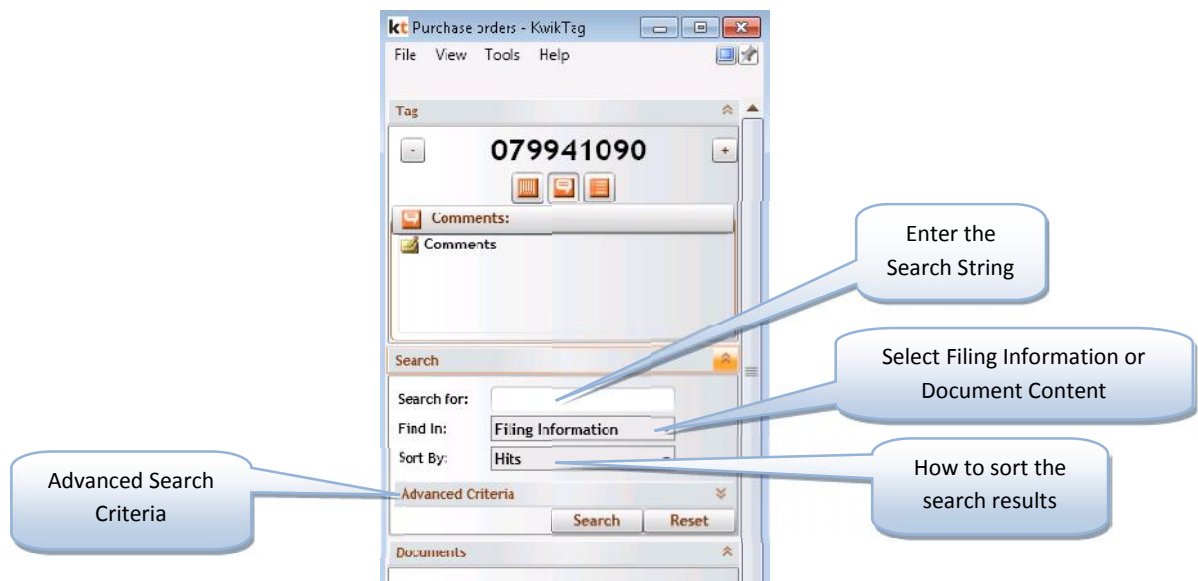


Figure 16

4. You can also narrow your search by expanding the **Advanced Criteria** section (Figure 17). Note that the date range search function is displayed in grey in this release. This feature is not currently enabled within KwikTag.

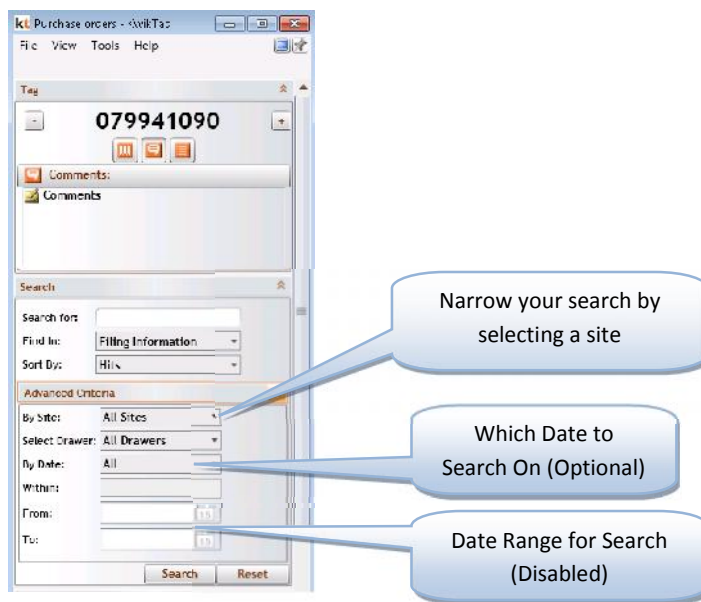


Figure 17

- a. You can narrow your search by selecting the site you want to search on. Under '**By Site**' you will only see the Sites that you can access. (Figure 18)
 - i. If you choose a site you can select a specific drawer to search in by selecting the drawer from the drop down (Figure 19)

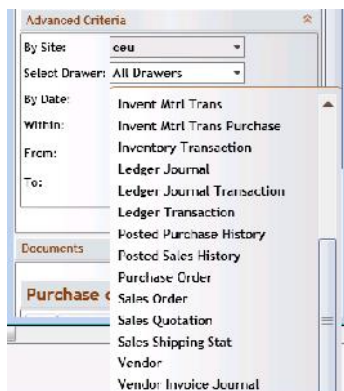


Figure 18

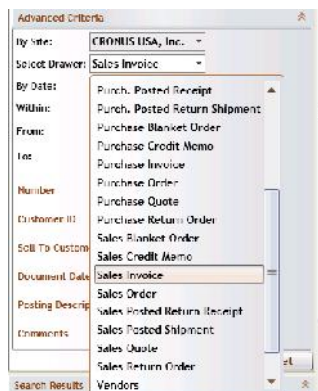


Figure 19

- a. If you choose a date type other than '**All**' you can select on a '**Date Range**' or a specific period of time. (Figure 20)

For a date range set the '**From**' and '**To**' dates for the search, or from the drop down you can select the period of time that you want to use for the search. (Figure 21)



Figure 20



Figure 21

2. Click **Search**

Return search for "Invoice" looking in 'Filing Information'. (Figure 22)

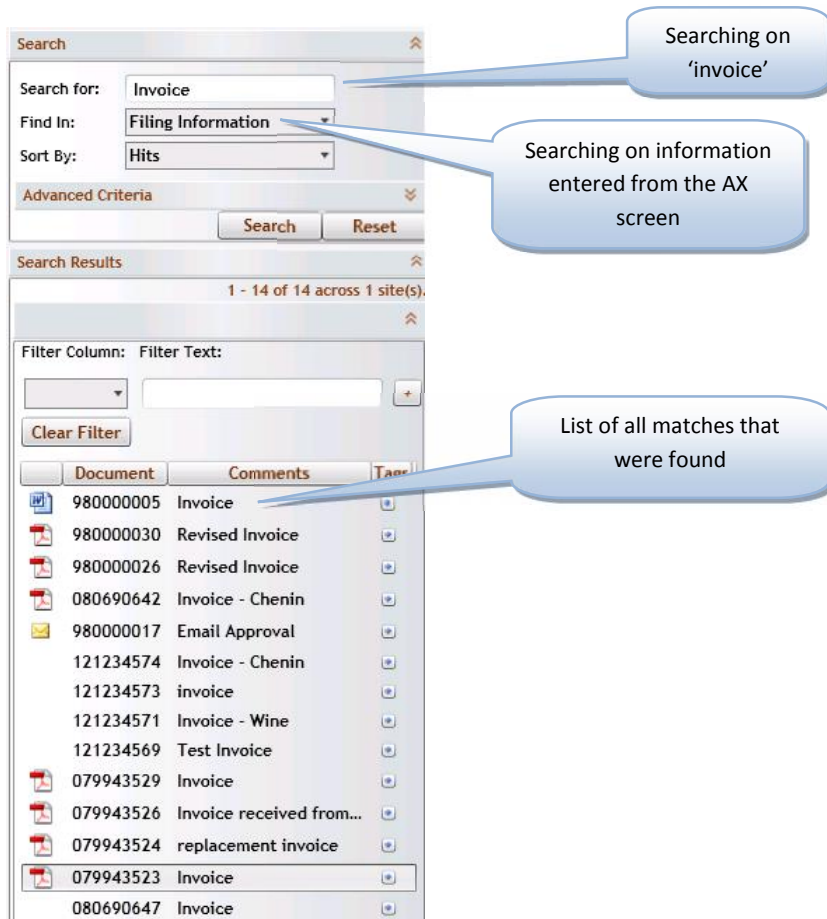


Figure 22

From the search results window you can:

1. View - Select the document and:
 - a) Double click on the document

Or

 - b) Right click and select '**View Document**' option(s)
2. Email - Select the document and:
 - a) Right click and select '**Email**'
3. Click '**Reset**' to clear the search criteria

THE KWIKTAG AX WORK QUEUE

For users who rely on KwikTag’s workflow capabilities to route documents for approval, the KwikTag AX embedded client provides a view of approved documents that can either be tagged to an entry in AX, or used to create a new entry. Please see the Web Client User Guide for more information regarding workflow.

TAGGING A DOCUMENT FROM THE WORK QUEUE

To tag an approved document from the KwikTag AX work queue and associate it with an entry in AX, complete the following steps:

- 1) From the Microsoft AX embedded client, click to expand the “**Work Queue**” view (Figure 24)

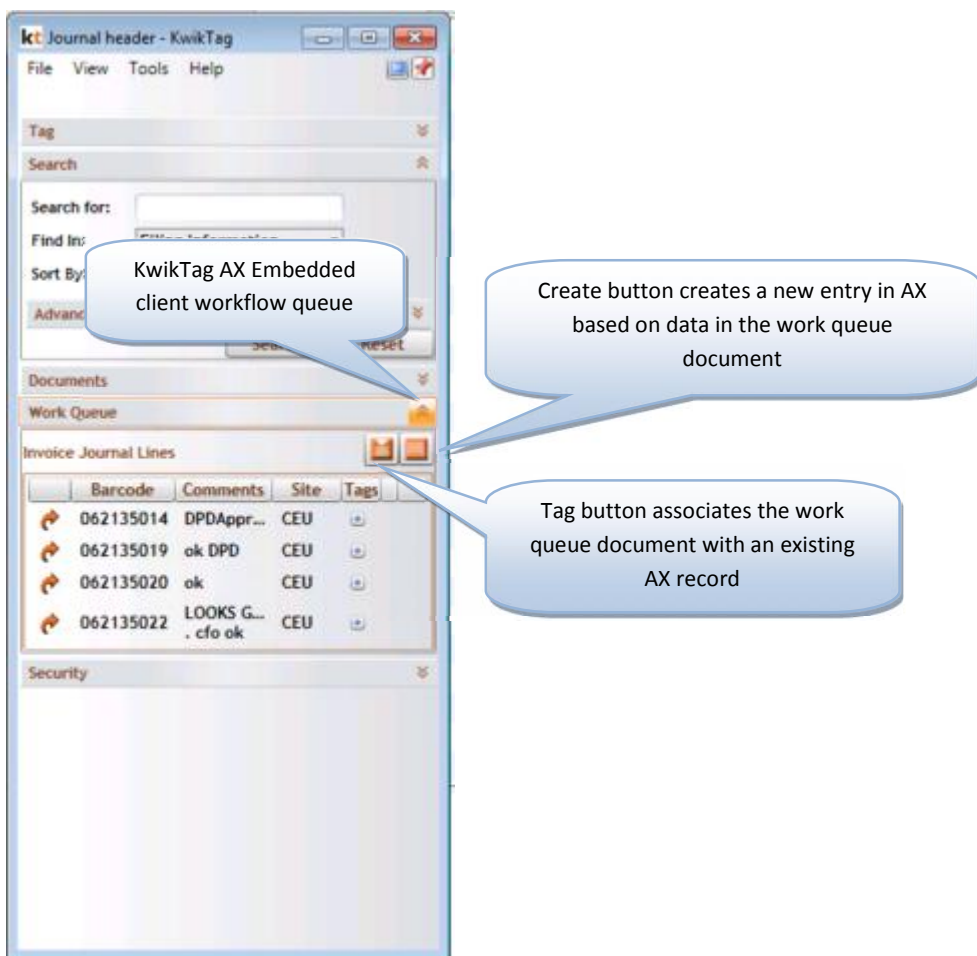


Figure 24

- 2) The KwikTag work queue will sort approved documents by document type, based upon your business rules and the types of documents you have chosen to route for approval. You can double-click on a document line to open and view the document, or click on the icon in the Tags column to view any relevant indexed data (Figure 25)

- 3) To Tag and associate the document with your entry, simply click the Tag button located in the upper left hand side of the work queue window (Figure 24).

CREATING A NEW AX ENTRY FROM THE WORK QUEUE

To create a new entry in AX based on data in an approved document from the KwikTag AX work queue, complete the following steps:

From the Microsoft AX embedded client, click to expand the “**Work Queue**” view (Figure 25)

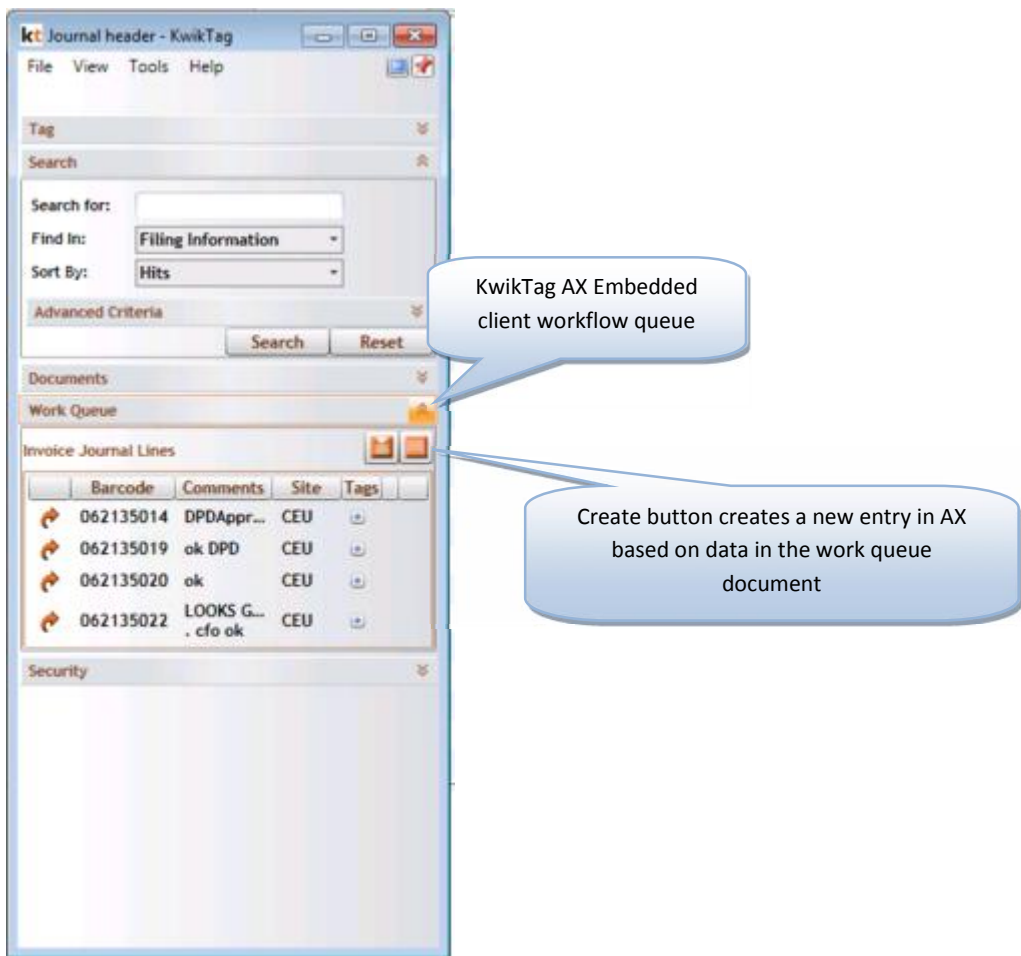


Figure 25

The KwikTag work queue will sort approved documents by document type, based upon your business rules and the types of documents you have chosen to route for approval (Figure 25). You can double-click on a document line to open and view the document, or simply click on the Tags icon to view any relevant indexed data (Figure 26)

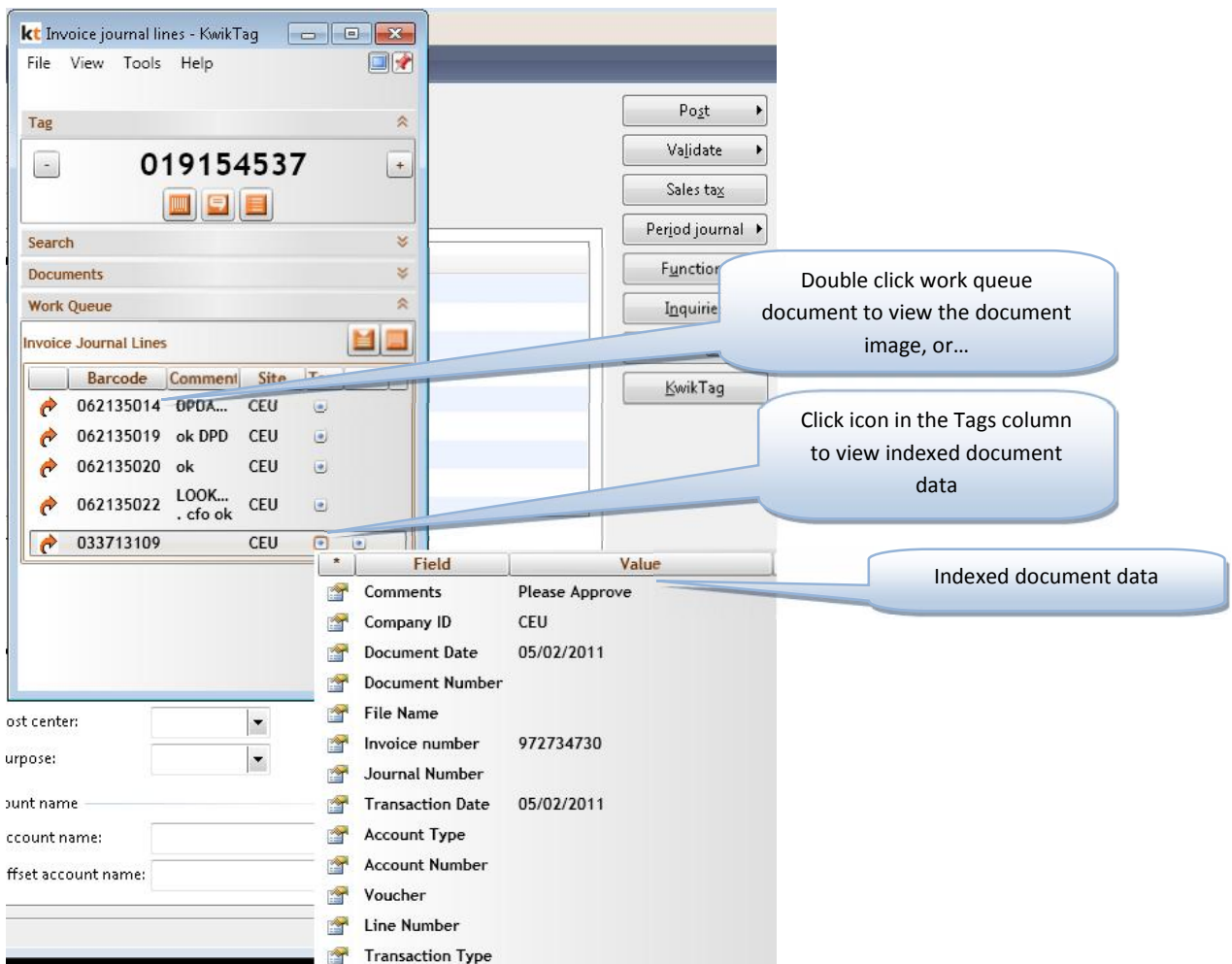


Figure 26

To create a new entry in AX, simply click the **Create** button located in the upper left hand side of the work queue window (Figure 25). It may take a few seconds for KwikTag to complete the create process.

Once the process is complete, KwikTag will create an entry in AX to a newly-created journal, with the document associated with your new entry. The document will be removed from the KwikTag work queue, but can be accessed for reference from the View Documents menu.

If you have any questions regarding the use of the KwikTag for MS Dynamics AX Embedded Client, please contact your company's KwikTag Administrator.



ImageTag, Inc.

1400 East Southern Avenue, Suite 800
Tempe, Arizona 85282

Phone: 480.753.9300

Fax: 480.753.9400

Toll Free: 1.888.KWIKTAG (594.5824)

www.imagetag.com