kwiktag®
by **Imagetag**

administrator guide

Version 4.6.5x

KwikTag 4.6.5x Web Administration Guide

CONTENTS

GETTING STARTED

You launch KwikTag® on your machine from your Web browser.

To start KwikTag:

1   Open your Web browser and type your KwikTag URL http://*ktsrv1*/ktadmin/. Contact your system administrator if you do not have the correct path.

2   The KwikTag Login window opens.

3   In the **User Name** box, type your user name.

4   In the **Password** box, type the password assigned to you by your system administrator.

5   To change your assigned password, select **Change Password**.

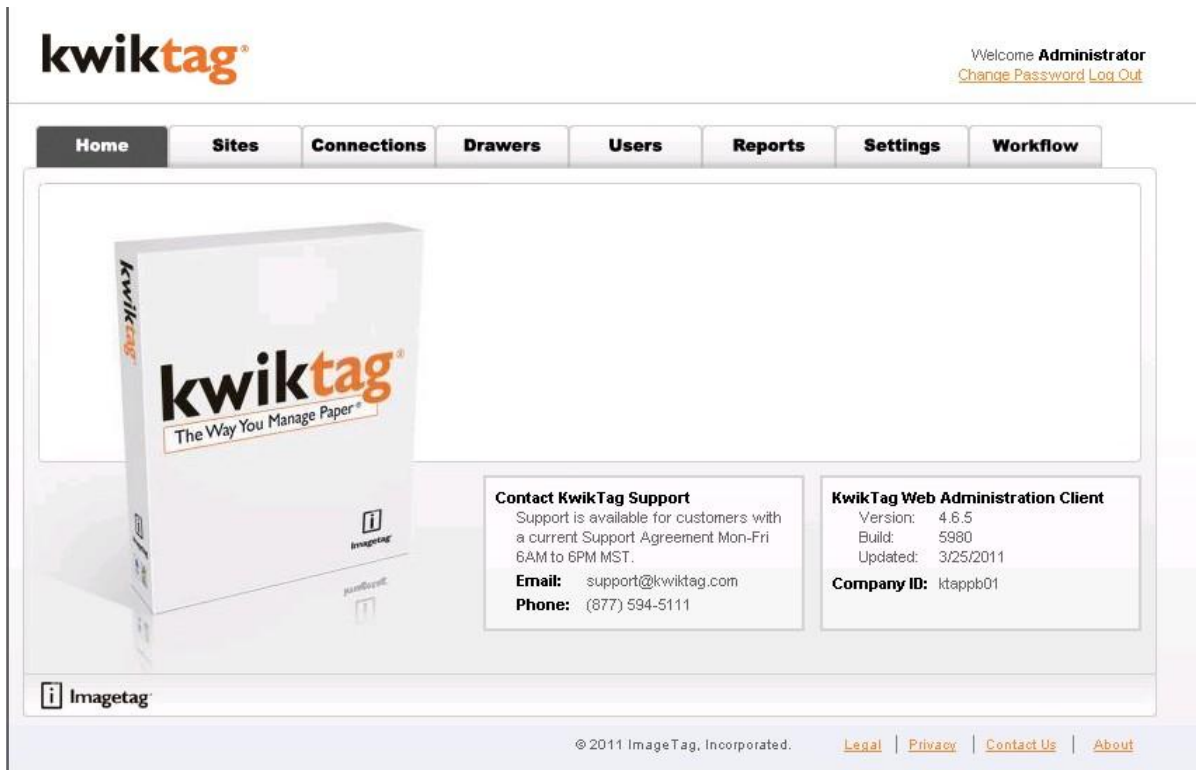6   Select the **Login** button. KwikTag opens and displays the Administration Home Panel.

Figure 1.0 – The first panel that appears after login is the KwikTag Administration Home Panel.

Seven function tabs are briefly described below:

Sites – used to group drawers together; when integrating with Dynamics systems sites are equivalent to the Dynamics companies

Connections – shows integration connection information, such as the Dynamics connection or SharePoint connection information

Drawers – used to organize and store digital document images

Users – allows creation, deletion and modifications to users and their most basic properties

Reports – documentation of statistical information based on KwikTag usage

Settings – allows changing system settings, such as audits and password policy

Workflow – allows the user to configure document workflow to be used inside the KwikTag system

The main window displays customized information.

➢ Contact KwikTag Support is available to clients with current Support Agreements:

Monday - Friday

6 A.M. to 6 P.M. Mountain Standard Time (Arizona does not follow Daylight Savings)

Email: support@kwiktag.com

Phone: (877) 594-5111

➢ KwikTag Web Administration Client:

Version: 4.6.5

Build: 5980

Updated: 3/25/2011

Company ID: ktappb01

SITES

Overview

Sites are created by the KwikTag Administrator and any user who is a member of the "KwikTag Admins" group. Sites are used to group certain drawers together, by department for example. In a Dynamics integration, a Site represents a company in the Dynamics environment.
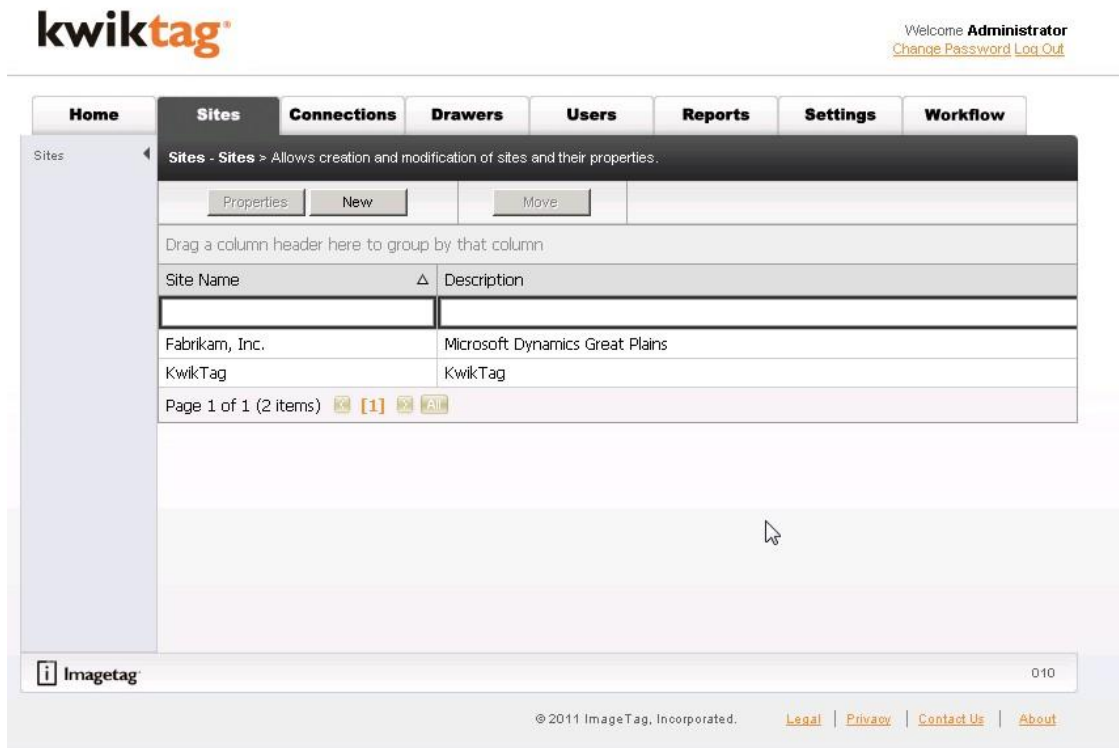
Figure 2.0 – Sites Tab

CREATING A NEW SITE

1 Click **New.** The Site Properties screen will display.

Figure 2.1 – Site Properties

2 Enter the following information:

- Site Name

- Site Description

3 Click **Apply**.

Caution: Sites cannot be deleted from the system. However the description can be updated. When integrating with a Dynamics system the Site names must match the Dynamics company names EXACTLY. This is what KwikTag uses to facilitate the connection to the Dynamics environment.

MOVING DOCUMENTS TO A NEW SITE

1   Click **Move.** The Move Documents screen will display.
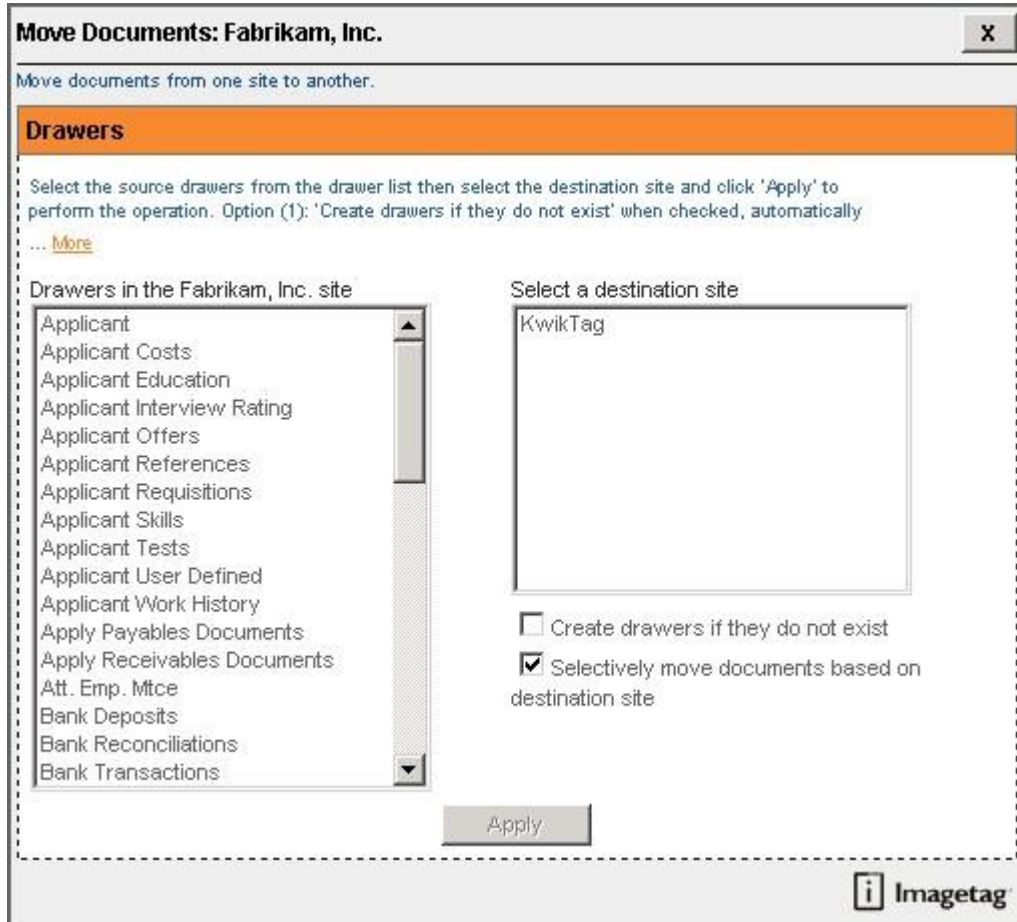
Figure 2.2 – Move Documents

2   Select the drawers to be moved to the new site by highlighting them in the left hand menu. You can use your CTRL and SHIFT keys to select multiple drawers.
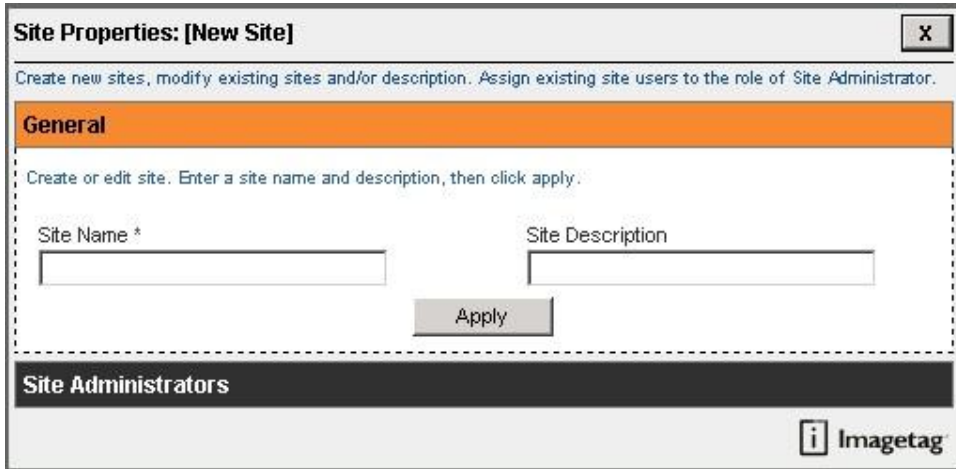
3   Select a destination site by highlighting it in the right hand menu.

4   Click "Create drawers if they do not exist" if you want the system to automatically create the drawers in the new site.

5   By default, the "Selectively move documents based on destination site" is selected. Leave this selection.

6   Click **Apply**.

CONNECTIONS

Overview

Connections are created by the KwikTag Administrator and any user who is a member of the "KwikTag Admins" group. Connections are used to create the integration points to Dynamics systems and also SharePoint sites. You can also define Dynamics module level security using the Connections.
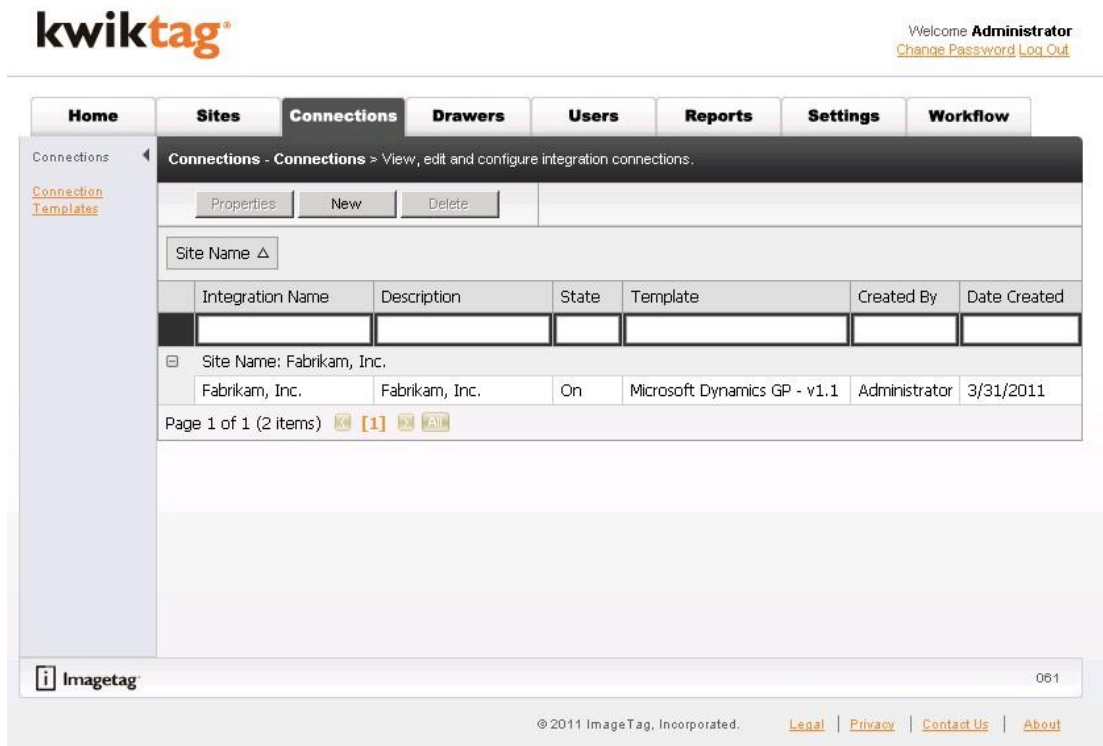

Figure 3.0 – Connections Tab

LEFT-HAND NAVIGATION

Once you navigate to the Connections tab you will notice a listing of available windows. Each window will allow you access to the different sections to manage. Each section contains a set of specific properties that can be edited related to Connections. These sections consist of the following:

- **Connections** – Allows you to view, edit and configure integration connections.

- **Connection Templates** – This is the standard list of integration connections available to you based upon your license structure. You can browse, edit and import/export available connection templates.

CREATING A NEW CONNECTION

1 Click **New.** The Connection Properties screen will display.

Figure 3.1 – Connection Properties

2 Enter the following information:

- Select Site Name (this list is populated by the previous tab)
- Select Template (this list is populated based upon your license structure)
- Name
- Description
- Connection State – leave the default selection of "On"

3 Click **Apply**.

SETTING PERMISSIONS USING CONNECTIONS

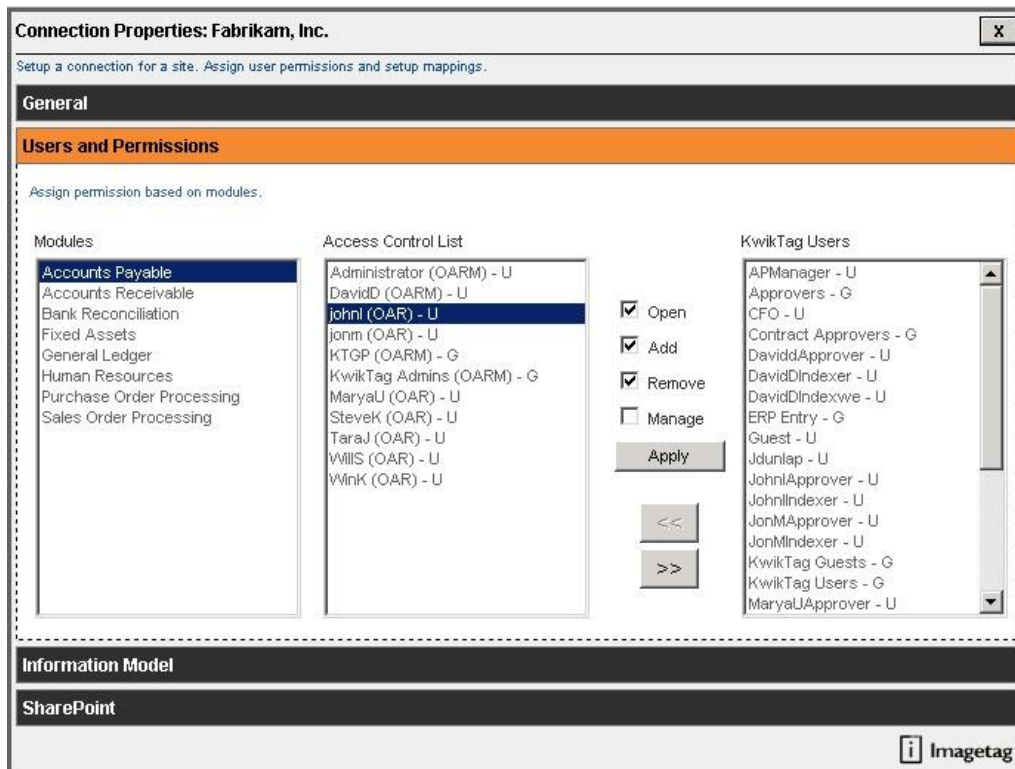1 Click the **Users and Permissions** section of the Connection Properties window.

Figure 3.2 – Users and Permissions

2   The available Dynamics Modules will display in the left hand menu.

3   The available KwikTag Users and Groups will display in the right hand menu.

4   The middle menu allows you to grant access per user or group for each module.

5   Select a Module from the left hand menu.

6   Click on a User or Group from the right hand menu to grant access to that Module.

7   From the menu options, determine what rights to give that User or Group by checking the appropriate boxes.

8   Click the left hand arrows to add the User or Group with the selected rights to the Access Control List.

9   Repeat the above steps for each individual Module.

Hint: Open allows the user to only view documents. Add allows the user to add documents to a drawer. Remove allows the user to delete documents from a drawer. Manage allows the user to manage the creation and deletion of drawers themselves. It is a best practice to leave the Manage rights with only the named Administrator.

If you need to edit the rights of a user already included in the Access Control List, simply highlight their name in the ACL, check the boxes of the rights you would like to give and click **Apply**.

INFORMATION MODEL

The Information Model section allows you to view the currently configured field mappings for each Dynamics form. Since these fields are mapped based upon the Dynamics integration templates, it is best practice not to make adjustments to them. If you need additional mapping services, contact the ImageTag Professional Services team to assist you.

Figure 3.3 – Information Model

SHAREPOINT

The SharePoint section allows you to view the currently configured SharePoint mappings. These mappings are completed with you during the KwikTag implementation based upon your business processes. It is best practice not to make adjustments to them. If you need changes made to the current configuration, contact the ImageTag Professional Services team to assist you.

Figure 3.4 – SharePoint

CONNECTION TEMPLATES

The Connection Templates section displays a list of the available integration templates based upon your license structure. This list can only be updated by adjusting your KwikTag licenses. In this section you can browse and import/export available connection templates.

Figure 3.5 – Connection Templates

DRAWERS

Overview

Drawers are created by the KwikTag Administrator and any user who is a member of the "KwikTag Admins" group, or an individual user who has been granted "Manage" rights to the Module or Drawer itself.
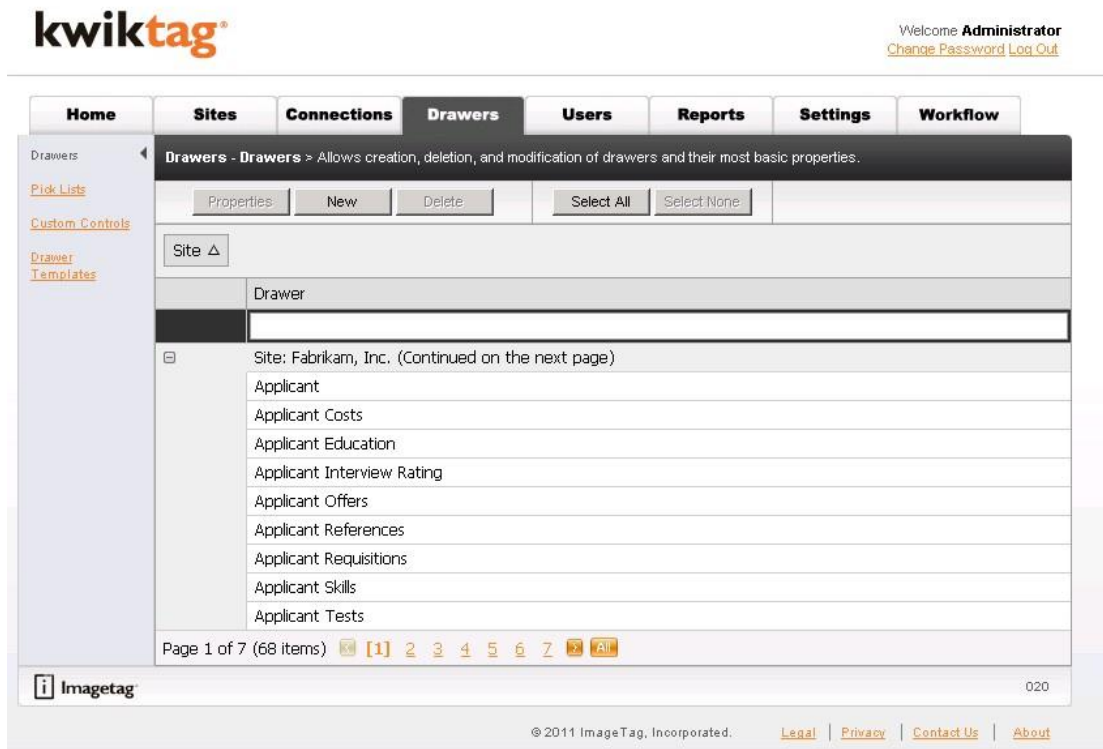
Figure 4.0 – Drawer Tab

LEFT-HAND NAVIGATION

Once you navigate to the Drawers tab you will notice a listing of available windows. Each window will allow you access to the different sections to manage. Each section contains a set of specific properties that can be edited related to drawers. These sections consist of the following:

- **Drawers** – Allows creation, deletion, and modification of drawers and their most basic properties.

- **Pick Lists** – Allows the creation, viewing, editing, and deletion of all pick lists used within drawers.

- **Custom Controls** – Allows creation, deletion, and modification of Custom Controls for Drawer fields.

- **Drawer Templates** – Allows creation and modification of drawer templates and their most basic properties.

SYSTEM AND CUSTOM FILING FIELDS

When a new drawer is created, its structure consists of the default system fields:
- Scanned Pages
- User Name

- Date Tagged
- Date Received
- Barcode
- Date Modified

During the drawer creation process the KwikTag Administrator creates other custom fields that KwikTag users complete to index their documents. These indices are known as filing fields. Drawers created by using Drawer Templates contain the same structure as the drawer template used.

DRAWERS

Drawers are the virtual filing containers for all documents in the KwikTag system. They are grouped together by Sites. You can add and delete drawers in the system at any time. During the initial implementation process, drawers will be created with you based upon your business processes. If you are integrating with a Dynamics system, your default drawers are automatically created for you with the Connection integration template for each Site.

To access this feature, click on the **Drawers** link on the left hand menu.

CREATING A NEW DRAWER

The KwikTag System uses electronic filing drawers to organize and store digital document images. These drawers are created based upon your business processes or from a Dynamics integration template.

1 Click **New.** The Drawer Properties screen will display.

Figure 4.1 – Drawer Properties: General

2   Complete the required information:

- Site (this list is populated by the Sites tab)

- Name

The following information is not required but recommended for entry:

- Drawer Template (this list is populated by the Drawer Templates section. Only select a template if you want to create a new drawer based on the template.)

- Alias

- Filter by User Name (My Filing) – leave this box unchecked so that the drawer is accessible to all users based upon permissions

- Publishable – leave this box checked unless you are integrating with SharePoint and you do not want this drawer published to SharePoint.

3   Click **Apply.**

FIELDS

During the drawer creation process the KwikTag Administrator creates custom fields that KwikTag users complete to index their documents. These indices are known as filing fields. Drawers created from a drawer template contain the same structure as defined in the template.

To access this feature, click on the **Fields** section of the Drawer Properties screen.

Figure 4.2 – Drawer Properties: Fields

1 Click **New.**

2 Type in a value in the **Field Name**. (Maximum 32 alphanumeric characters.)

3 Select **Field Type**:

- Currency
- Date/Time
- Memo
- Numeric
- Pick List - If Pick List is selected then the Pick List field below will enable to select the value from.
- Text

4 If applicable, select the value for **Pick List**.

5 If applicable, select a field value **Validator**. This is used for Email, Zip Code and Social Security Number.

6 If applicable, select a **Custom Control** from the list. This is generated from the Custom Controls section in the Drawers tab.

7 Enter a value in **View Order**.

8 Check **Hidden** if this field should be hidden from the end-user.

9   Check **Type Ahead** if new field needs to accommodate assisted typing.

10 Check **Auto Entry** if new field should accommodate for pre-population.

11 Check **Read Only** if this field should not allow entry.

12 Check **Required Field** if new field must have a value.

13 Click the double left arrows to add the new field to the list of Drawer Fields.

EDITING EXISTING DRAWER FIELDS

1   Open the Drawer by double clicking on it or highlighting the Drawer and clicking on the **Properties** button.

2   Click on the **Fields** section.

3   Highlight the **Field** to be edited.

3   If applicable type in a new value in the **Field Name**. (Maximum 32 alphanumeric characters.)

4   If applicable Select **Field Type**:

- Currency

- Date/Time

- Memo

- Numeric

- Pick List - If Pick List is selected then the Pick List field below will enable to select the value from.

- Text

5   If applicable, select the value for **Pick List**.

6   If applicable, change the field value Validator. This is used for Email, Zip Code and Social Security Number.

7   If applicable, change the Custom Control selected. This is generated from the Custom Controls section in the Drawers tab.

8   If applicable, enter a different value in **View Order**.

9   If applicable, change value **Hidden** if this field should be hidden from the end-user.

10 If applicable, change value for **Type Ahead** if new field needs to accommodate assisted typing.

11 If applicable, change value for **Auto Entry** if new field should accommodated for pre-population.

12 If applicable, change value for Read Only if this field should not allow entry.

13 If applicable, change value for **Required Field** if new field must have a value.

14 Click **Apply**.

Figure 4.3– Edit Existing Field

Note: After each field is edited, the **Apply** function must be executed in order to proceed to the next field.

Caution: If the drawer contains documents, you cannot change a text field to numeric or numeric to text. If a text field is changed to a pick list, it cannot be changed back to a text field.

DELETING EXISTING DRAWER FIELDS

1   Open the Drawer by double clicking on it or highlighting the Drawer and clicking on the Properties button.

2   Click on the Fields section.

3   Highlight the Field to be deleted.

4   Click **Delete** button. System will ask to verify delete.

5   To proceed with delete, click **OK**.

Note: Click Cancel to abort operation.

Figure 4.4 – Delete Existing Field

PERMISSIONS

The System Administrator uses the Permissions section to manage a drawer's Access Control List (ACL). The ACL displays the groups and users who have access to the drawer and the specific permissions granted to each user or group. For each user or group listed on the ACL, there are four rights which can be granted:

To access this feature, click on the **Permissions** section of the Drawer Properties screen.
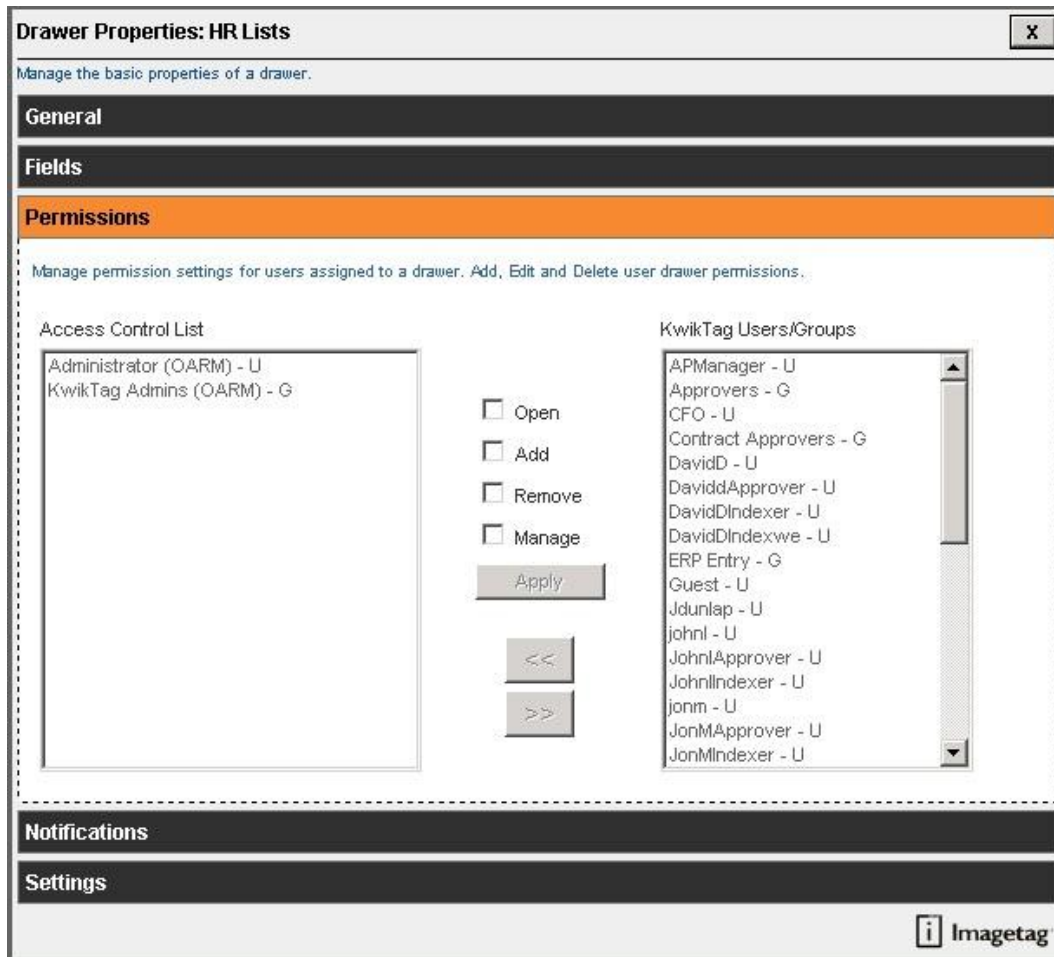
Figure 4.5– Drawer Properties: Permissions

PERMISSIONS DEFINITIONS

- **Open:** Users may open the drawer and search through the entire list of documents. The user may also view the document images, but cannot edit the filing field information. The user may copy documents to another drawer for which they have the Add permission.

- **Add:** Users may add documents to a drawer or edit the filing field information of existing documents. Users who are granted only the Add permission will see a drawer as a drop box. It allows the user to place new documents in the drawer, however, the user will be unable to view the drawer's contents after refresh.

- **Remove:** Users may remove a document from the drawer. This permission is also required in order for a user to move a document from one drawer to another.

- **Manage:** Users will be able to change drawer properties, establish or modify document services. These tasks are performed in the Administration client. Additionally, users must have the Manage permission to perform any of the drawer-related management tasks delegated to them by the Systems Administrator.

ADDING PERMISSIONS TO GROUP/USERNAME

1   The available KwikTag Users and Groups will display in the right hand menu.

2   The left hand menu displays the current ACL for this drawer.

3   Click on a User or Group from the right hand menu to grant access to this drawer.

4   From the menu options, determine what rights to give that User or Group by checking the appropriate boxes.

5   Click the left hand arrows to add the User or Group with the selected rights to the Access Control List.

Hint: If you need to edit the rights of a user already included in the Access Control List, simply highlight their name in the ACL, check the boxes of the rights you would like to give and click **Apply**.

Figure 4.6– Add/Edit Permissions

NOTIFICATIONS

The Notification tool is used to schedule an information notice to the filing user or to another person. A notification can be sent to alert the recipient that there is activity in that drawer.

To access this feature, click on the **Notifications** section of the Drawer Properties screen.

Figure 4.7 – Drawer Properties: Notifications

ADDING NOTIFICATION ON EXISTING DRAWERS

Notifications allow the user to send a notification to either the filing user or another user or list of users. There are two types of system notifications that are already part of the drawer and are sent to the Filing User by default; one for when a document is indexed and not scanned (**Not Scanned)** and one for when the scanned number of pages does not match the number of pages entered by the user **(Page Count Mismatch)**.

You can add additional system notifications per the instructions below.

1 Click **New**.

2 Select type of notification from the **Activity** drop down list.

- Document Activity

- Document Received

- Not Scanned

- Page Count Mismatch

3   Select **Duration** days.

4   Select **Attach** from drop down list.

5   Enter the **From** email address. This will default to the email address entered for the named Administrator account.

6   Enter the **To** email address or check the box to have the notification sent to the **Filing User**.

7   Enter a topic in the blank **Subject** field.

8   Enter a note in the blank **Message** field.

9   Click the double left arrows to add the notification to the **Activities in Drawer** list.

Hint: If you need to edit a notification included in the Activities in Drawer list, simply highlight the notification, edit the information on the right accordingly and click **Apply**.

Figure 4.8– Add/Edit Notifications

DRAWER SETTINGS

Drawers have settings that provide default instructions for document images and archive procedures. Image Settings include orientation, image format, image processing, and other checks. Archive procedures will determine the purge cycle for drawers. Drawers will fill with documents over time. While the drawer capacity is virtually unlimited, the ever increasing number of documents will affect both the efficiency and time required to perform data filing and retrieval tasks. A document retention plan can help keep the KwikTag system in good operating condition. Documents can be removed from a drawer by exporting document images and/or metadata to another physical location, or by purging documents from the drawer.

To access this feature, click on the **Settings** section of the Drawer Properties screen.

Figure 4.9 – Drawer Properties: Settings

EDIT DRAWER SETTINGS

Image Settings:

1   Select **Storage Format**:

- PDF Image = PDF with no OCR
- PDF Image + Text = PDF with OCR (this is the default and allows the document content search)
- TIFF Image

2   Select **View Orientation.**

- Auto Rotate

- Rotate 90°

- Rotate 180°

- Rotate 270°

3   Check **Deskew** if required.

Changes how the KwikTag software orients the document based on the barcode placement.

4   Retain base TIFF is checked by default. Leave this checked in order to retain your original image.

5   Click **Apply**.

Note: PDF and TIFF images are the standard storage formats used with the KwikTag software.

<u>Archive Settings:</u>

1   **Include drawer contents in purge cycle**, check / uncheck.

2   **Export Metadata as:**

- Do Not Export

- Portable Reposition

- Delimited Format

- Report

3   **Retain From**, query field based on date filed, date modified, and date.

4   **Retain For**, the length in months to retain images.

5   **Enable Retention**, check if required.

6   **Lock Document**, check / uncheck.

7   **Mark for Deletion**, check / uncheck.

8   Click **Apply**.

PICK LISTS

Users are allowed to create, view, edit and delete all pick lists used within the drawers. The System Administrator defines the List Name and List Entry values.

To access this feature, click on the **Pick Lists** link on the left hand menu.
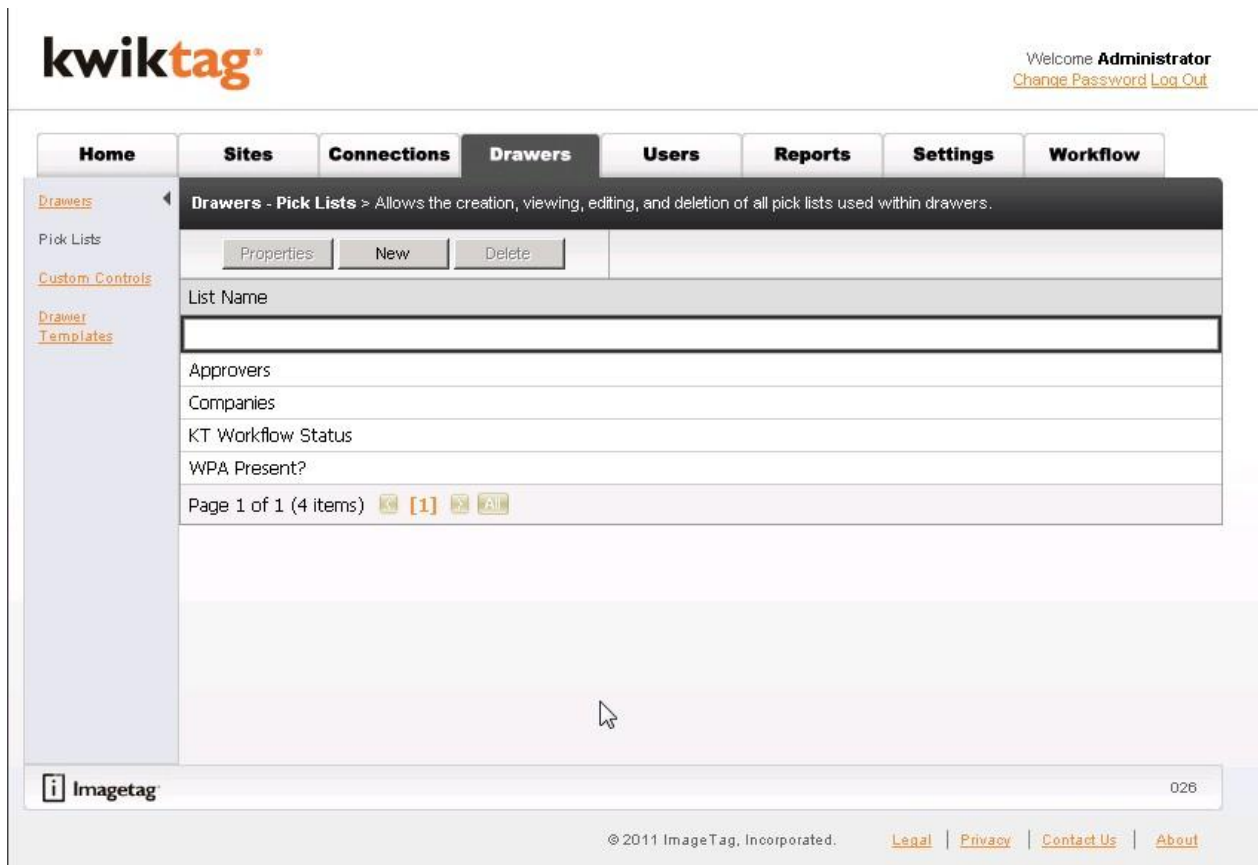
Figure 4.10 – Pick Lists

ADDING A PICK LIST

1   Click **New.** The Pick List Properties screen will display.
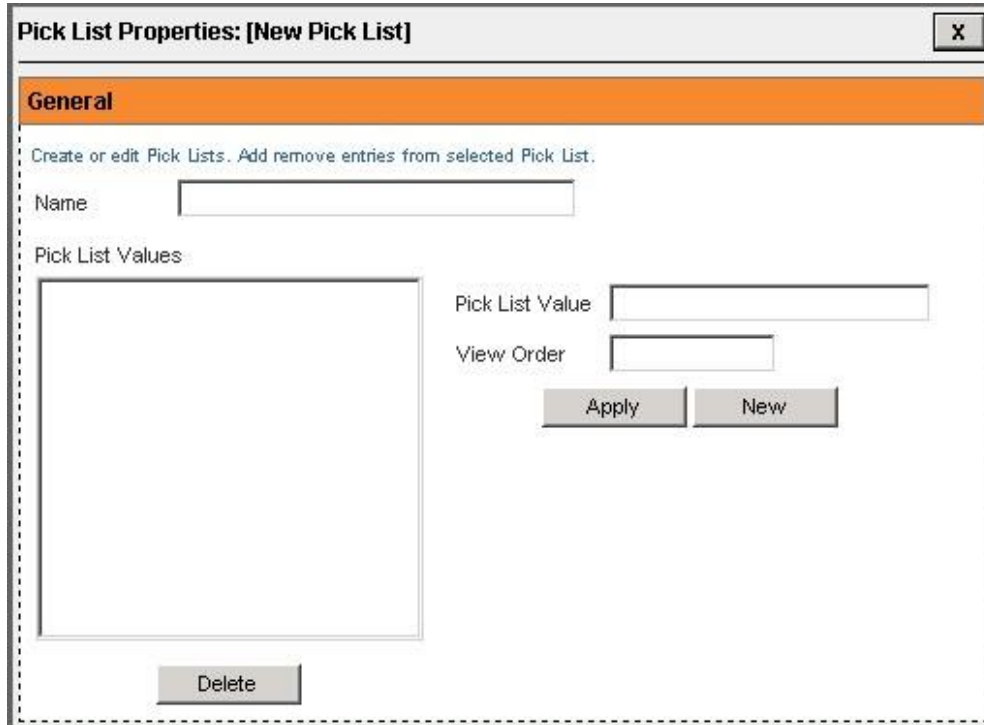
Figure 4.11 – Pick Lists Properties

2   Enter a **Name** for the Pick List.

3   Click **New** to start adding the values to the Pick List.

4   Enter a **Pick List Value** to be included in the drop down list.

5   Assign a numeric **View Order** to organize the drop down list.

6   Click the **Apply** button.

7   The new value will show in the Pick List Values menu.

8   Repeat above steps until all of the Pick List values have been created.

Hint: If you need to edit an existing Pick List Value, simply highlight the value, edit the information on the right accordingly and click **Apply**.

CUSTOM CONTROLS

Users are allowed to create, delete and modify Custom Controls for Drawer fields. The System Administrator defines the Custom Controls to be used. There are three system default "validators" included in the Custom Controls section. They are Email, Social Security Number and Zip Code. Typically the "user controls" pertain to integration fields for Dynamics lookup lists. These will be created as part of the implementation process. They are used to access GL Distribution Codes and Vendor Lists.

To access this feature, click on the **Custom Controls** link on the left hand menu.
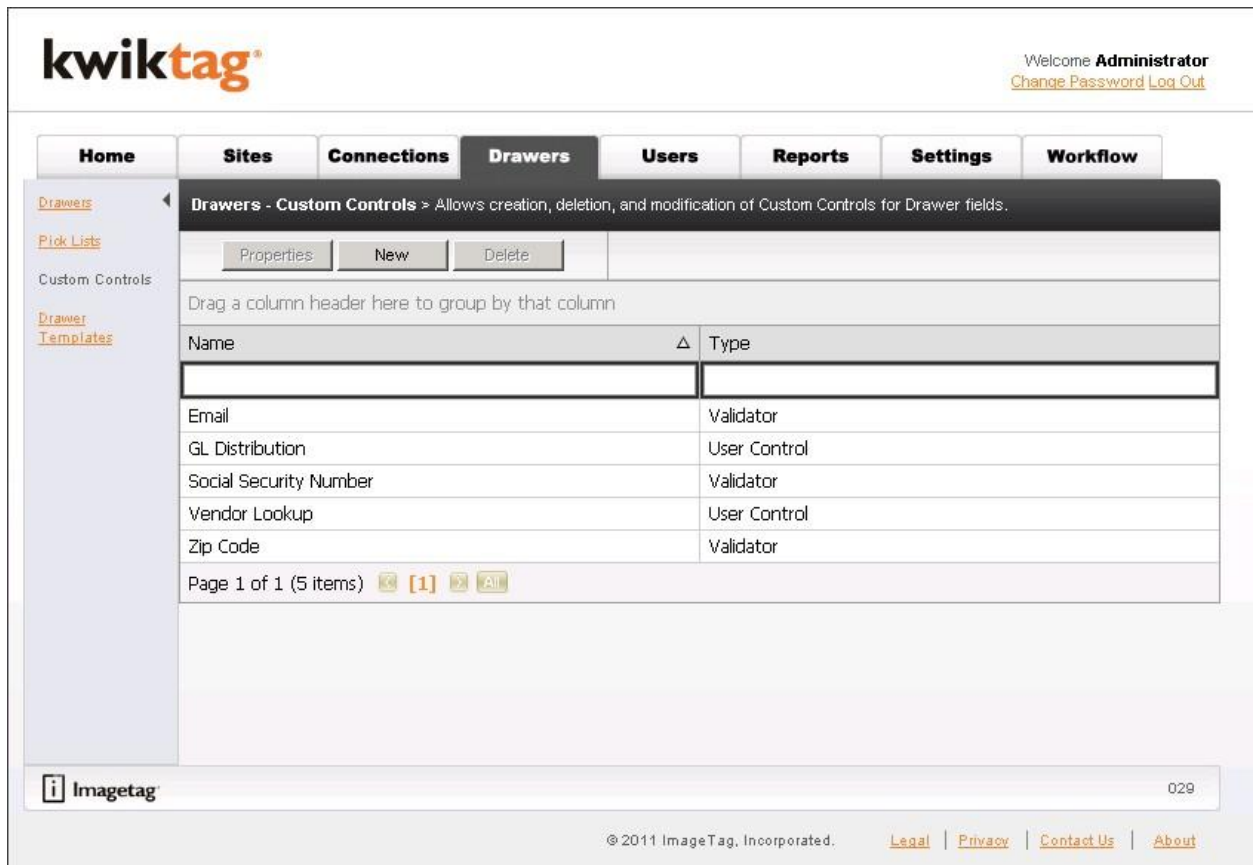
Figure 4.12 – Custom Controls

ADDING A CUSTOM CONTROL

1   Click **New.** The Custom Controls Properties screen will display.

Figure 4.13 – Custom Controls Properties

2   Enter a **Name** for the Custom Control.

3   Select the **Type** of Custom Control to be created.

4   Click **Apply**.

Note: Parameters are defined by either the KwikTag or Dynamics system depending on the type of Custom Control selected.

DRAWER TEMPLATES

Users are allowed to create, delete and modify Drawer Templates to be used for ease of drawer creation. A pre-defined drawer structure, including filing fields, can be created as a template and be used during the creation of a new drawer. A Dynamics integration will already contain Integration Drawer Templates based on the entry forms in the Dynamics system.

To access this feature, click on the **Drawer Templates** link on the left hand menu.
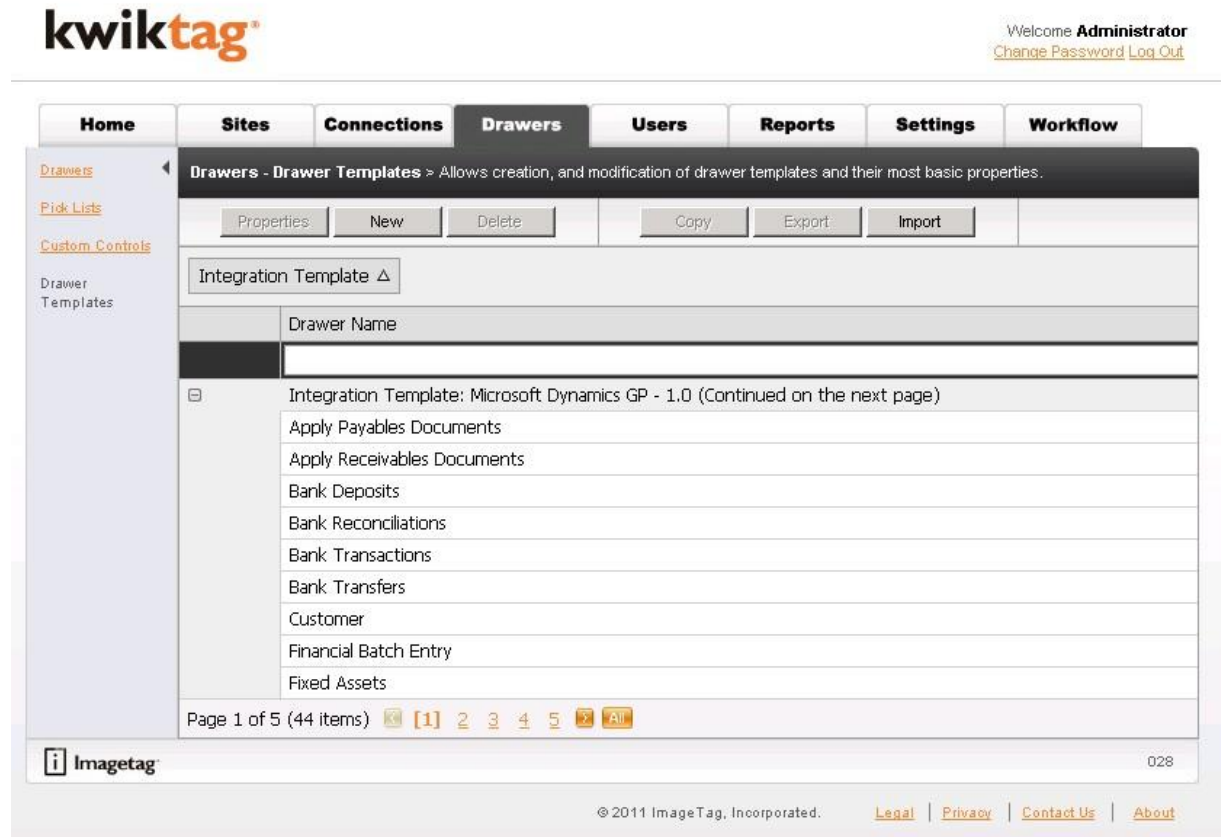
Figure 4.14 – Drawer Templates

ADDING A DRAWER TEMPLATE

1   Click **New.** The Drawer Template Properties screen will display.

Figure 4.15 – Drawer Template Properties

2   Enter a **Name** for the Drawer Template.

3   If applicable, enter an **Alias.**

4   Select a **Version** from the drop down list. This is a required field and must start at 1.1.

5   If this drawer should be published to SharePoint, select the **Publishable** checkbox.

6   Click **Apply**.

DRAWER TEMPLATE FIELDS

During the drawer template creation process the KwikTag Administrator creates custom fields that KwikTag users complete to index their documents. These indices are known as filing fields. Drawers created from a drawer template contain the same structure as the template.

To access this feature, click on the **Fields** section of the Drawer Template Properties screen.

Figure 4.16 – Drawer Template Properties: Fields

1   Click **New.**

2   Type in a value in the **Field Name**. (Maximum 32 alphanumeric characters.)

3   Select **Field Type**:

- Currency
- Date/Time
- Memo
- Numeric
- Pick List - If Pick List is selected then the Pick List field below will enable to select the value from.
- Text

4   If applicable, select the value for **Pick List**.

5   If applicable, select a field value **Validator**. This is used for Email, Zip Code and Social Security Number.

6   If applicable, select a **Custom Control** from the list. This is generated from the Custom Controls section in the Drawers tab.

7   Enter a value in **View Order**.

8   Check **Hidden** if this field should be hidden from the end-user.

9   Check **Type Ahead** if new field needs to accommodate assisted typing.

10   Check **Auto Entry** if new field should accommodate for pre-population.

11   Check **Read Only** if this field should not allow entry.

12   Check **Required Field** if new field must have a value.

13   Click the double left arrows to add the new field to the list of Drawer Template Fields.

Hint: If you need to edit the fields already included in the Drawer Template Fields list, simply highlight the field, edit the information on the right accordingly and click **Apply**.

DRAWER TEMPLATE SETTINGS

Drawers have settings that provide default instructions for document images and archive procedures. Image Settings include orientation, image format, image processing, and other checks. Archive procedures will determine the purge cycle for drawers. Drawers will fill with documents over time. While the drawer capacity is virtually unlimited, the ever increasing number of documents will affect both the efficiency and time required to perform data filing and retrieval tasks. A document retention plan can help keep the KwikTag system in good operating condition. Documents can be removed from a drawer by exporting document images and/or metadata to another physical location, or by purging documents from the drawer.

To access this feature, click on the **Settings** section of the Drawer Template Properties screen.

Figure 4.17 – Drawer Template Properties: Settings

EDIT DRAWER TEMPLATE SETTINGS

Image Settings:

1   Select **Storage Format**:

- PDF Image = PDF with no OCR
- PDF Image + Text = PDF with OCR (this is the default and allows the document content search)
- TIFF Image

2   Select **View Orientation.**

- Auto Rotate
- Rotate 90°
- Rotate 180°
- Rotate 270°

3   Check **Deskew** if required.

Changes how the KwikTag software orients the document based on the barcode placement.

4   Retain base TIFF is checked by default. Leave this checked in order to retain your original image.

5   Click **Apply**.

Note: PDF and TIFF images are the standard storage formats used with the KwikTag software.

Archive Settings:

1   **Include drawer contents in purge cycle**, check / uncheck.

2   **Export Metadata as:**

- Do Not Export
- Portable Reposition
- Delimited Format
- Report

3   **Retain From**, query field based on date filed, date modified, and date.

4   **Retain For**, the length in months to retain images.

5   **Enable Retention**, check if required.

6   **Lock Document**, check / uncheck.

7   **Mark for Deletion**, check / uncheck.

8   Click **Apply**.

USERS

OVERVIEW

KwikTag security is designed to control access to the system's document drawers. 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:

- Creating users

- Creating groups to manage collection of users

- Granting users and groups access to drawers

- Managing security policies, for example password length or expiration

- Defining the auditing of various document and system activities

- Managing and creating filing drawers

LEFT-HAND NAVIGATION

Once you navigate to the Users tab you will notice a listing of available windows for the Users tab. Each window will allow you access to the different sections to manage. Each section contains a set of specific properties that can be edited related to Users. These sections consist of the following:

- **Users** – Allows you to manage the users themselves. This is where you will Add, Edit and Disable users.

- **Groups –** Allows you to create and manage groups. Groups are a collection of users, and each user inherits the rights of the group.

USERS

KwikTag security and licensing is based upon a named user model. All users granted access to the system must have a unique user id. In some instances, the System Administrator may allow user names to login at multiple workstations. This is appropriate for members of a single department sharing the same security profile for retrieving documents. The ability for user names to login at multiple workstations is controlled by a security policy setting.

A newly created user is assigned to a default group. New users created via the KwikTag Admin tool are automatically added to the "KwikTag Users" group only when added manually. When added via "Windows Auth Configuration or AD Sync" the results are different. 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.

To access this feature, click on the **Users** link on the left hand menu.

Figure 5.0 - Users

Caution: Users who file (index) documents should never share user names. Tag dispensers are assigned to users by their user names and sharing dispensers is not recommended. User actions are audited and tracked for security purposes.

CREATING USERS

1 To add a user, click **New**. The User Properties window will display.
2 Enter the following required data:

- User Name

- First Name

- Last Name

- CAL Type: Selection between Contribute (Full Access) or Consume (View Only)

- Email

- Password

- Confirm Password

- Disabled, check/uncheck (Users brought in from AD Sync will be disabled by default)

The following information is not required but recommended for entry:

- Description

- Title

3   Click **Apply**. The user is created and appears in the Users list.

Note: The default group is the KwikTag Users group.

Note: The KwikTag software requires that users belong to at least one group. The only users exempt from this requirement are the Administrator and Guest user accounts.

Figure 5.1– User Properties

EDITING USER INFORMATION

1   Select the user in the User list to be modified.

2   Double click on the User Name or Click **Properties.**

3   Modify any of the user information. By selecting a new CAL Type, the existing license will be released and the new license will show as used.

4   Click **Apply** to save any changes.

Hint: Entering in user information into the blank fields above the user list will expedite the search for a specific user.

Figure 5.2– Edit User

Caution: 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. In using AD Sync where users are created from an Active Directory group, they are disabled by default. The System Administrator must license each user created.

DISABLING A USER

Disabling prevents a specified user from logging into KwikTag. A user cannot be deleted from KwikTag; they can only have their account disabled.

1   Select the user from the **Users List** to be disabled.

2   Double click on the User Name or Click **Properties.**

3   Click **Disabled** box.

4   Click **Apply**. The user is now disabled and cannot log in to KwikTag.

     To reinstate a user, repeat the above steps and clear the **Disabled** box.

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.

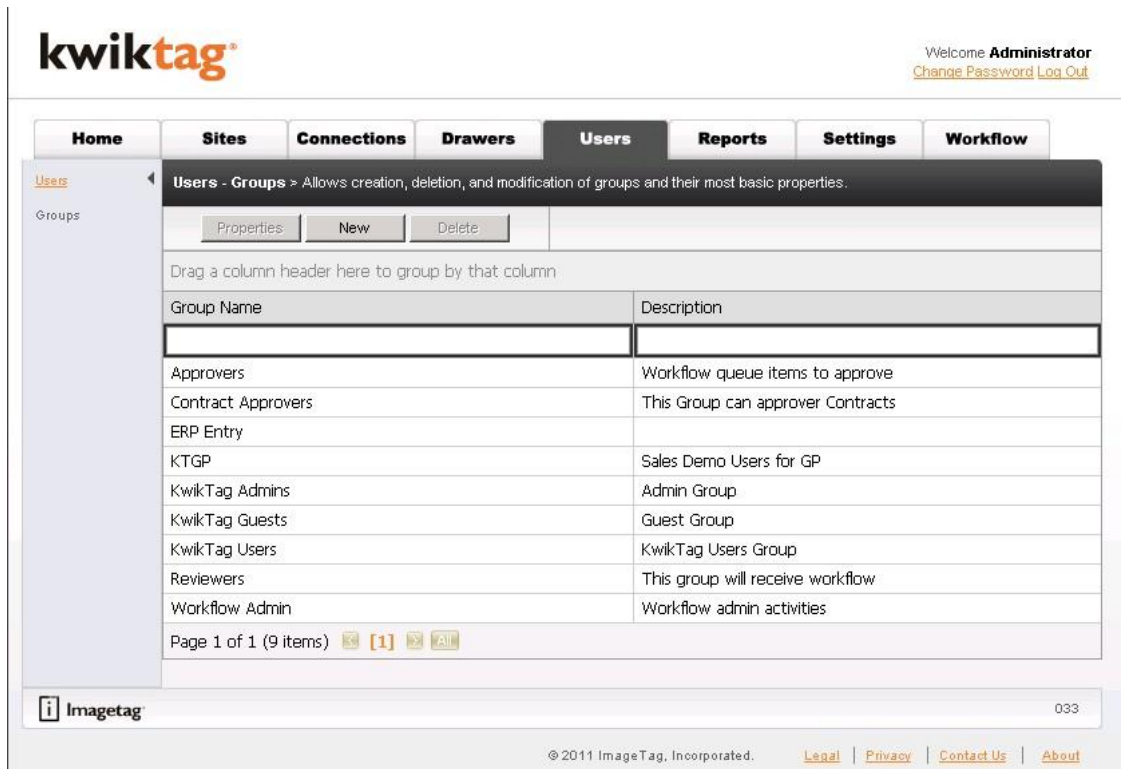To access this feature, click on the **Groups** link on the left hand menu.

Figure 5.3 – Groups

DEFAULT GROUPS

The KwikTag software provides three default groups:

- KwikTag Users
- KwikTag Administrators
- KwikTag Guests

System Administrators have the flexibility to change any or all of the default groups except to delete them. New users are automatically added to the KwikTag Users group.

ADDING A GROUP

1   Click **New**.

2   Type the **Group** name.

3   Type a brief group **Description**.   For example, System Engineering, Product Marketing, Human Resources, Internal Sales, External Sales.

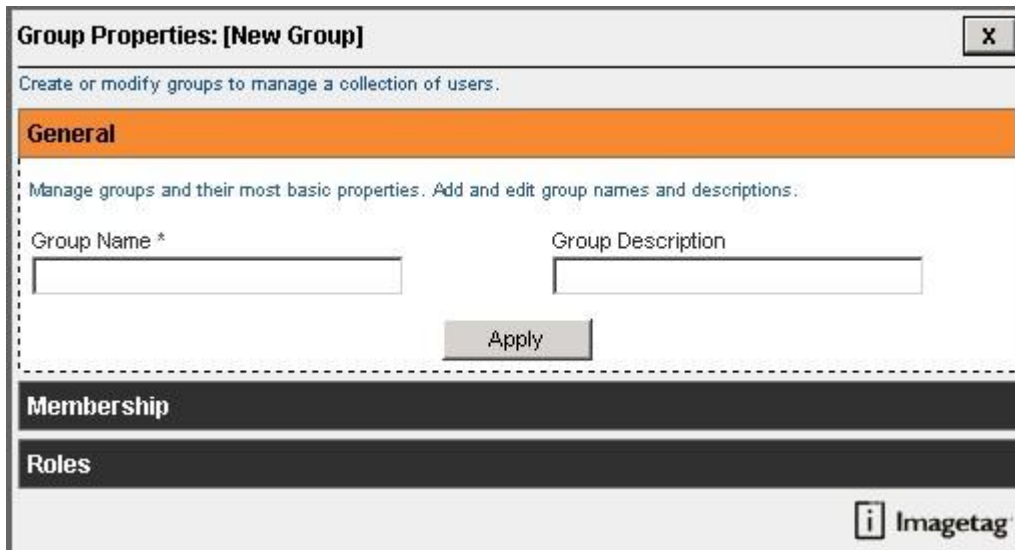4   Click **Apply**. The Group is added to the Groups list.

Figure 5.4 – Group Properties

EDITING A GROUP

1   Select **Group**.

2   Double click on the Group Name or Click **Properties.**

3   Change the displayed information as required.

4   Click **Apply**.

REMOVING A GROUP

1   Select **Group**.

2   Click **Delete**.

3   The "Delete Confirmation" dialog appears.

4   Click **OK**.

ADDING MEMBERS TO A GROUP

Once a group is created, members (users) can be added to it. The user has to exist already in the Users list to select them as part of a Group.

1   Select **Group**.

2   Double click on the Group Name or Click **Properties.**

3   Click on the **Membership** section.

4   The left menu lists all of the Current Users in the Group. The right menu lists all of the available KwikTag users.

5   Select **User(s)** from the right menu and add to the left menu by clicking the double left arrows. This will add the User(s) to the Group. The system automatically saves the additions.

Hint: You can hold down the CTRL or SHIFT keys to select multiple User names. The system will not duplicate an existing user name entry. To remove Users from a Group, select the Users from the left menu and add to the right menu by clicking the double right arrows.
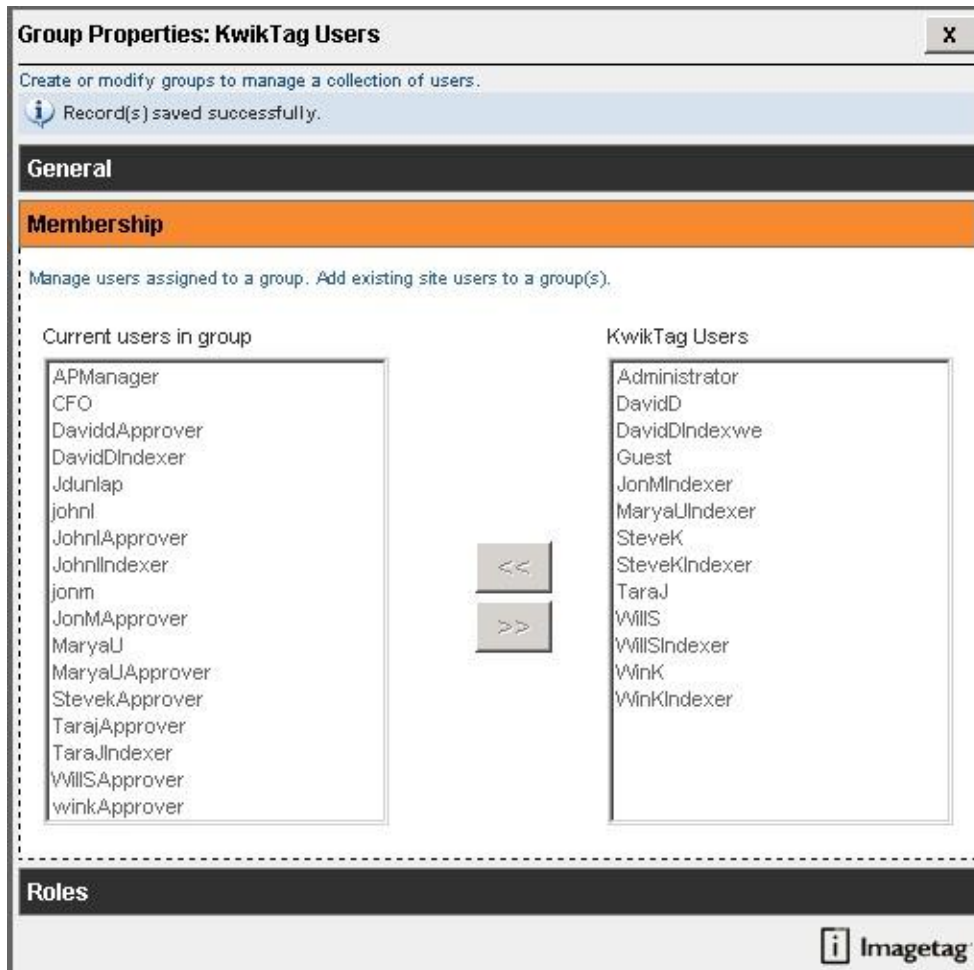

Figure 5.5 – Adding Members to a Group

REPORTS

OVERVIEW

The KwikTag filing system includes a reporting function. The available reports are:

- Archived Documents by Drawer
- Document Versions by Drawer
- Drawer Statistics
- Export Activity
- Indexed Documents
- Inventory Reports by Closed Cartons
- List of Cartons
- List of Full and Open Cartons
- Monthly Drawer Activity
- Monthly Image Retrieval Activity
- Record Dispositions
- Records Retention Codes
- Retention Code Mismatch
- Retention Dates – by Drawer
- Retention Dates – expired by Drawer
- Retention Dates – within 30 Days by Drawer
- Retention Properties By Drawer
- Scan Operator Activity
- Scanned Pages
- Security
- Subsystem Versions
- User Statistics

RUNNING A REPORT

1   **Select Report to Run** from the drop down list.

2   Click **Run Report**.

3   The report will be generated in the window below.

4   To export to **PDF, Word** or **Excel**; select the desired software icon on the toolbar.

5   System will ask to either **Open** or **Save** file.

6   Make selection and click **OK**.
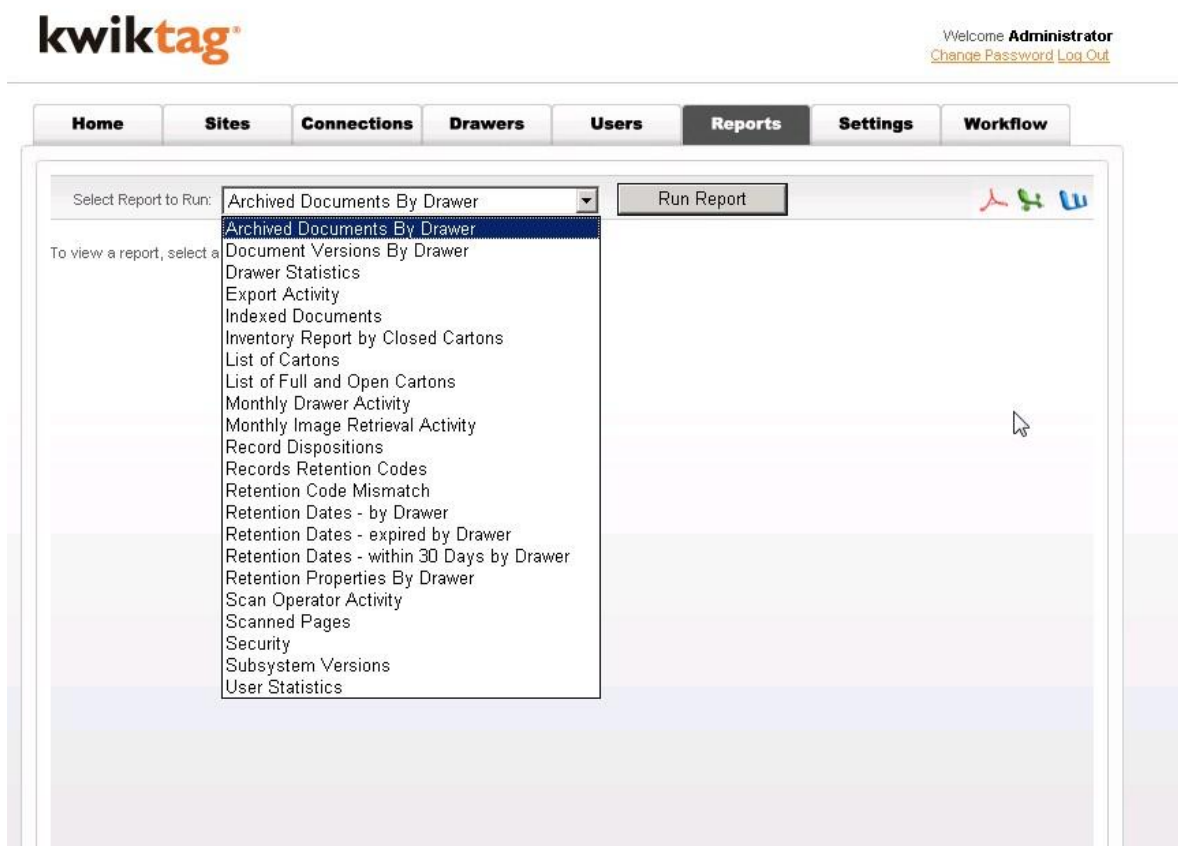
Figure 6.0 – Report Selection Window

SYSTEM SETTINGS

OVERVIEW

The Settings tab of the KwikTag Admin tool allows the System Administrator to configure several different areas of the KwikTag system. This tab also includes a link to the NEWS Management system that supplies all of the KwikTag system updates to the appliance.

LEFT-HAND NAVIGATION

Once you navigate to the Settings tab you will notice a listing of available windows. Each window will allow you access to the different sections to manage. Each section contains a set of specific properties that can be edited related to system settings. These sections consist of the following:

- **Audit** – Allows you manage the audit settings for the drawers. This is where you Edit the default settings for the audit properties.

- **Global** – Allows you to manage the global settings for the system. This is where you will Add, Edit the default settings.

- **Security** – Allows you to manage the security. This is where you Edit and default security settings.

- **Licenses** – Allows you to manage the user licenses. This is where you Edit the default settings for the licenses.

- **Repositories** – Allows you to create, delete, and modify repositories and their most basic properties.

- **Search** – Allows rebuilding of KGS index.

- **Login Message** – Allows you to change the Login Message.

- **Windows Auth Config** – Setup Windows Authentication for KwikTag.

- **System Management** – This is a link to the NEWS Application which allows you to perform appliance maintenance including server patching and updates.

AUDIT SETTINGS

The System Administrator has the ability to set the audit options on user activity through the audit panel.

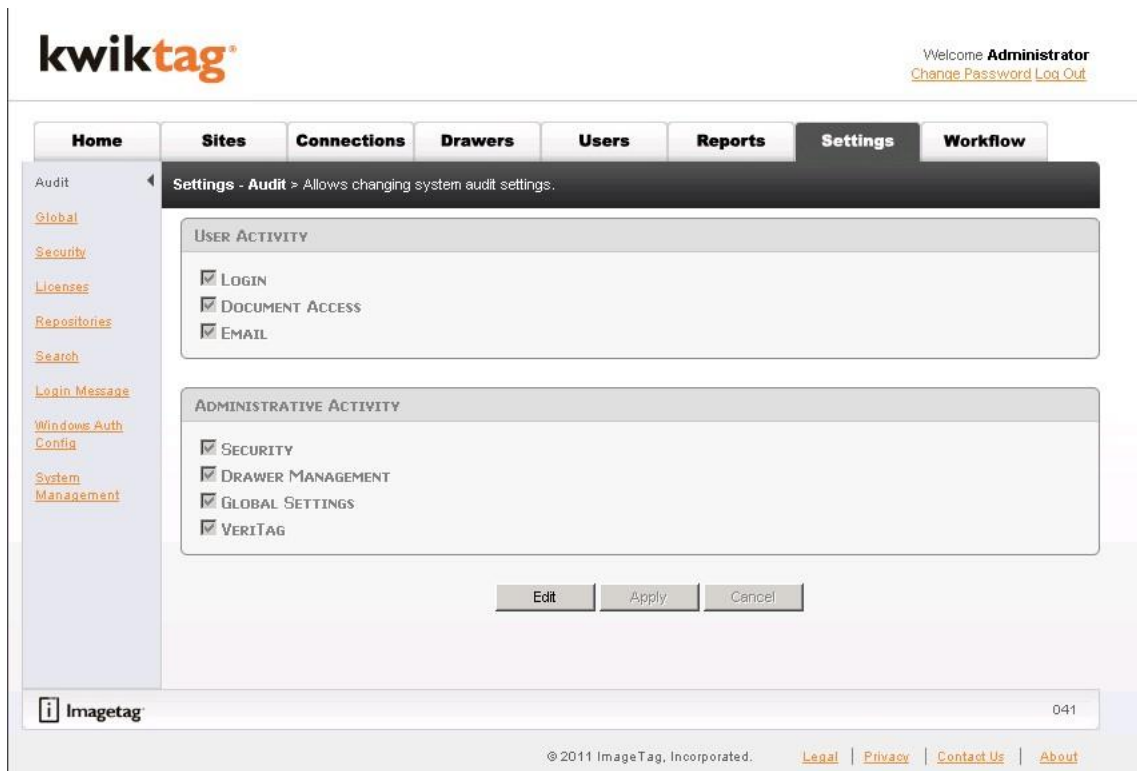To access this feature, click on the **Audit** link on the left hand menu.

Figure 7.0 – Audit

ENABLING SECURITY AUDITS

The System Administrator can audit KwikTag user and administrator activity and create log files of that activity.

- User Activity:
  - Login
  - Document Access
  - Email
- Administrative Activity:
  - Security
  - Drawer Management
  - Global Settings
  - VeriTag

EDITING AUDIT OPTIONS

1   Click **Edit** to select or de-select **Activities**.

2   Click **Apply**.
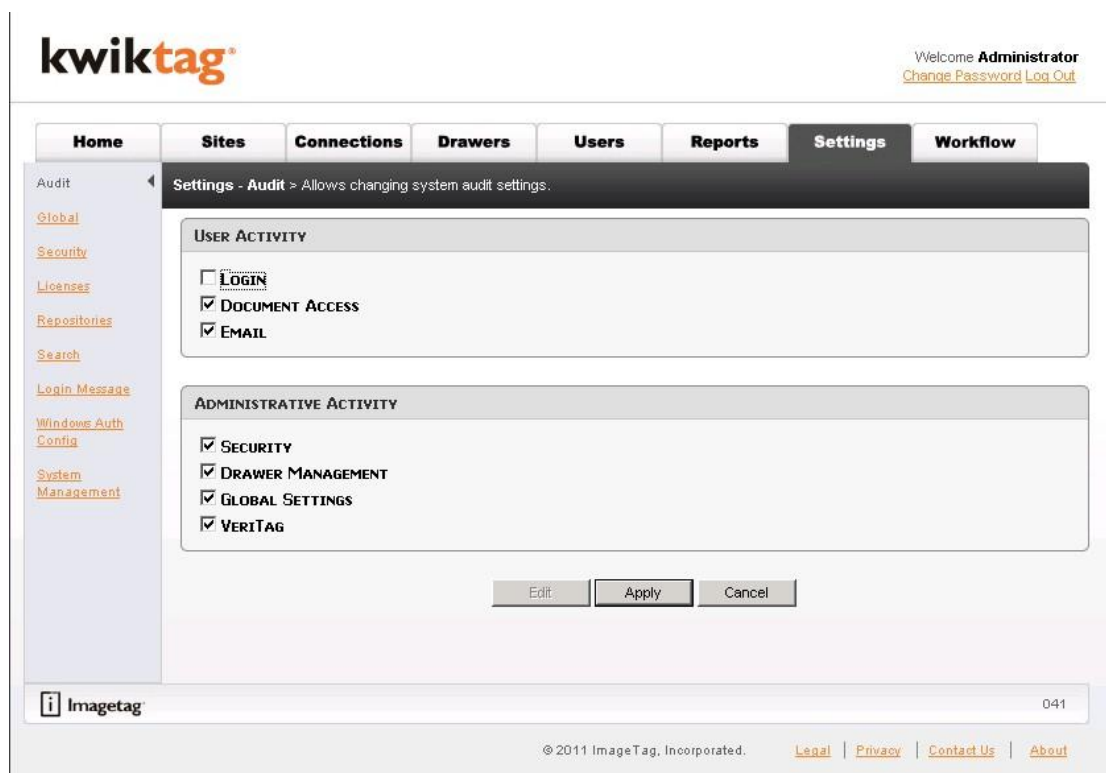
Figure 7.1 – Edit Audit Settings

GLOBAL SETTINGS

The Global Settings page provides a catch-all for unrelated KwikTag system settings and preferences. This page is typically read-only as it is best practice to not change the system defaults.

To access this feature, click on the **Global** link on the left hand menu.

Figure 7.2 – Global Settings

WEB SETTINGS

Web settings are applicable to the KwikTag web application. They specify the application's URL (for email purposes), the name of the server or system that appears next to the KwikTag logo at the top of each web page.

1   Select **Edit** to modify the following Global Settings:

- In the **Web Client URL** field, type the URL for the KwikTag web application. This address will be incorporated into emails that get sent to users of the application when they are instructed to revisit the application to fix a problem or check an image.

2   Click **Update** to save the settings.

MISCELLANEOUS SETTINGS

1 Select **Currency Type** from drop down.

If a field of type "currency" is created in Drawer, Fields page the default setting in "settings" page (either US dollars/Euro/ect.) would be the value of currency field.

2 Check if **Auto-add Tag (Label) Dispensers** is required**.**

The method to handle the tag inventory will determine how this option is set. When this box is checked, KwikTag will allow users to enter tag dispensers into inventory. This setting relieves the System Administrator of the responsibility of entering a number of dispensers into inventory before the application can be used.

REPOSITORY SETTINGS

This shows the default Repository settings. It denotes the repository volume and storage information. It is best practice to not change the default settings.

SECURITY

The System Administrator had the ability to set and control security policies for the KwikTag system. Password and Account Lockout policies are set on the Security panel. Click **Edit** to modify these policies.

To access this feature, click on the **Security** link on the left hand menu.

Figure 7.3 – Security

PASSWORD POLICY

The controls in the Password Policy area define:

- **Minimum Password Length:** The minimum number of alphanumeric characters allowed for a password. If set to 0, no password is required.

- **Maximum Password Age:** The maximum number of days a password may be used before it expires. If set to 0, password must be reset at each login.

- **Notice of Password Expiration:** The number of days before a password expires to start displaying the password expiration warning message. If set to 0, no warning message is displayed.

- **Password History:** The number of days the password is retained in the history file. This setting affects the number of days that must pass before a user can reuse a password. For example, password age is set to 10 days and the history is set to 60 days, seven passwords must be used before restarting the cycle. If set to 0, no history is kept.

- **Sequential Control:** If yes is selected, users may not use numerals (1, 2, 3, etc.) at the beginning or end of the password. For example, 23birthdays or birthdays23 are not permitted while birth23day is permitted.

SET THE PASSWORD POLICY

1 For items that use counters, type the desired number.

2 For items with a drop down, selected desired action.

ACCOUNT LOCKOUT POLICY

The Account Lockout policy governs:

- Reset Lockout Counter: The duration (in minutes) of the lockout.

- Account Lockout Threshold: The number of times a user can fail Login before being locked out of the KwikTag software.

SETTING ACCOUNT LOCKOUT POLICY

1 For items that use counters, type the desired number.

2 For items with a drop down, selected desired action.

LICENSES

KwikTag software licensing panel identifies customers by name, identification number and the license number(s).

To access this feature, click on the **Licenses** link on the left hand menu.

Figure 7.4 - Licenses

EDIT CUSTOMER LICENSING INFORMATION

1 Click **Edit** to modify the License Key, Customer Name and Customer ID. Typically you would just copy/paste your license key from an email that comes from the ImageTag fulfillment department.

2 Click **Preview License Settings** to view the new license structure.

3 Click **Update** to apply the changes to the license structure.

REPOSITORIES

KwikTag has data repositories to store all of the scanned images. The Repositories section of the Admin tool shows the default repository information. It is best practice to not adjust the default information. You can add additional repositories here if needed.

To access this feature, click on the **Repositories** link on the left hand menu.

Figure 7.5 - Repositories

SEARCH

KwikTag allows you to perform global searches across the entire database based upon either filing information or document content. There may be times when the search feature needs to be re-indexed to clear out previous searches. The Search window of the Settings tab allows you to perform this re-index.

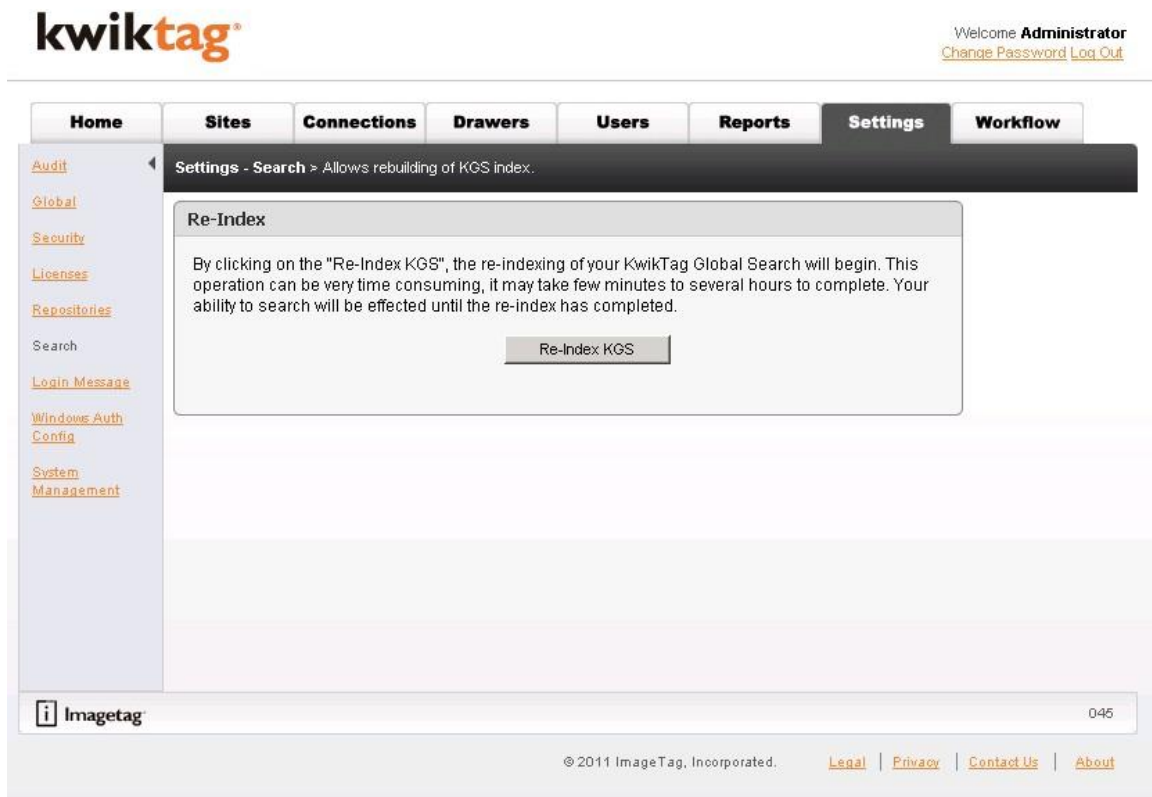To access this feature, click on the **Search** link on the left hand menu.

Figure 7.6 - Search

RE-INDEX SEARCH

1   Click **Re-Index KGS** to perform the Search feature re-index. A message will display letting you know that the re-index was started successfully.

LOGIN MESSAGE

KwikTag allows you to create a personalized login message for the end-users to see when they log into the Web client.

To access this feature, click on the **Login Message** link on the left hand menu.
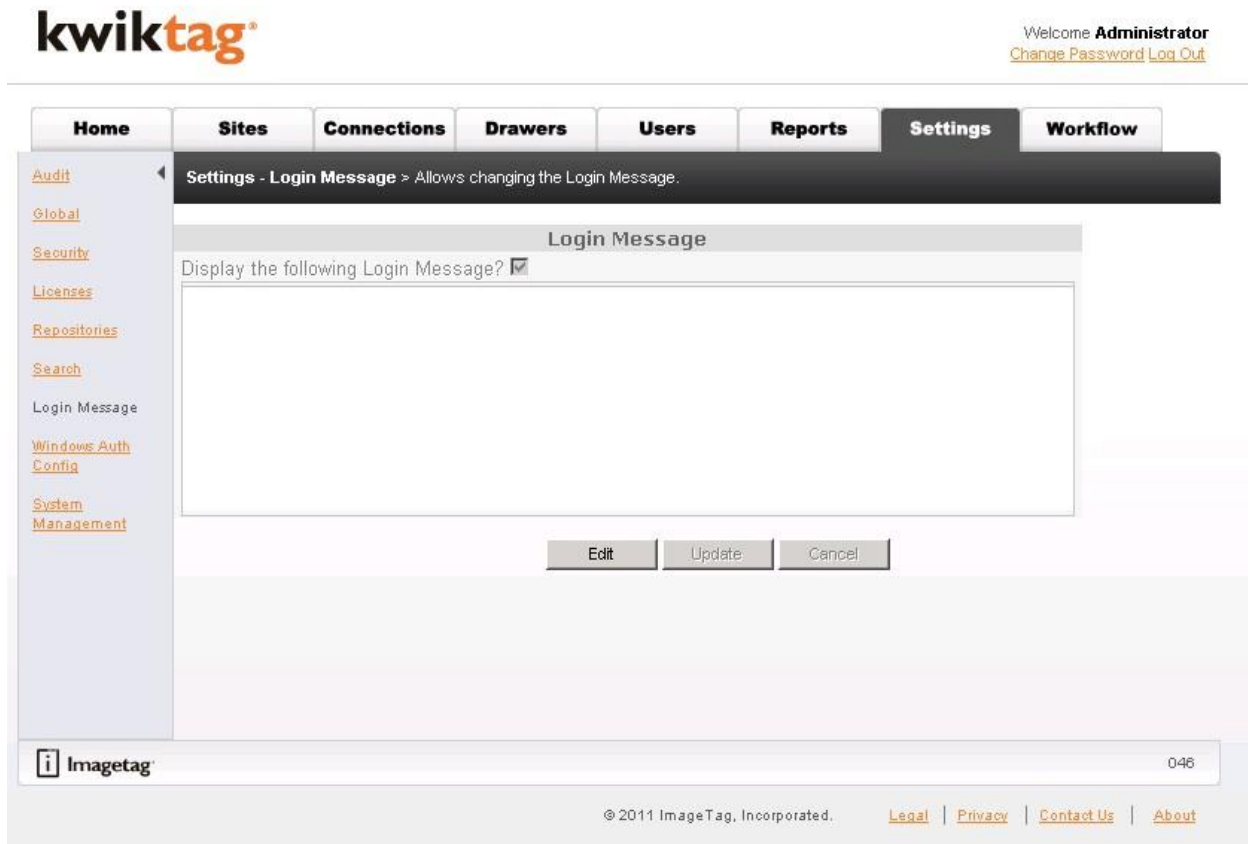

Figure 7.7 – Login Message

LOGIN MESSAGE CHECK BOX

When this item is checked a message is displayed to the user at login. To display login messages, perform the following steps:

1   Click **Edit**.

2   Verify that the check box is selected to **Display the following Login Message**.

3   Create a message in the text box

4   Click **Update** to save settings.

WINDOWS AUTH CONFIG

KwikTag allows integration with the AD server on your network. Once the settings have been entered KwikTag will poll against a designated AD User Group to create new KwikTag users. The user accounts will be created in KwikTag, however they are disabled until the System Administrator updates the user account with an appropriate license type. Typically the setup for this feature is done during the implementation process.

To access this feature, click on the **Windows Auth Config** link on the left hand menu.

Figure 7.8 – Windows Auth Config

CONFIGURING THE WINDOWS AUTH CONFIG (AD SYNC)

1 Click **Edit**.

2 Enter the following information to establish the connection to the AD Server.

- AD URL – this is the IP address of the AD Server. LDAP must precede this entry.

- Username – this user must have at least read-only access to the AD Server. The domain name needs to precede the User Name.

- Password – this is the Password for the above User account.

- KwikTag Default Password – this is the default password for all KwikTag users created using AD

- Polling Rate – the rate at which KwikTag will poll against the AD Server looking for new users.

3   Click **Test** to have the **All Groups** list populated.

4   From the **All Groups** list, select the AD Users Group(s) to use for KwikTag users. Click the double right arrows to add that group or groups to the **My Groups** list.

5   Click **Update** to save settings.

SYSTEM MANAGEMENT – NEWS APPLICATION

The KwikTag appliance is a "closed" appliance. It automatically pushes updates to the KwikTag software and also includes Microsoft updates. You can access certain features of server administration including installing these updates from the System Management link. This link takes you to the KwikTag NEWS application which is used to manage the KwikTag appliance.

To access this feature, click on the **System Management** link on the left hand menu. A new internet explorer window will launch. Follow the instructions below to access the KwikTag NEWS application to manage the KwikTag appliance updates.

1   Click **Continue to this website** from the internet window that launches.

2   You will be prompted to log into the NEWS application. Enter the following credentials:

- User Name = Admin
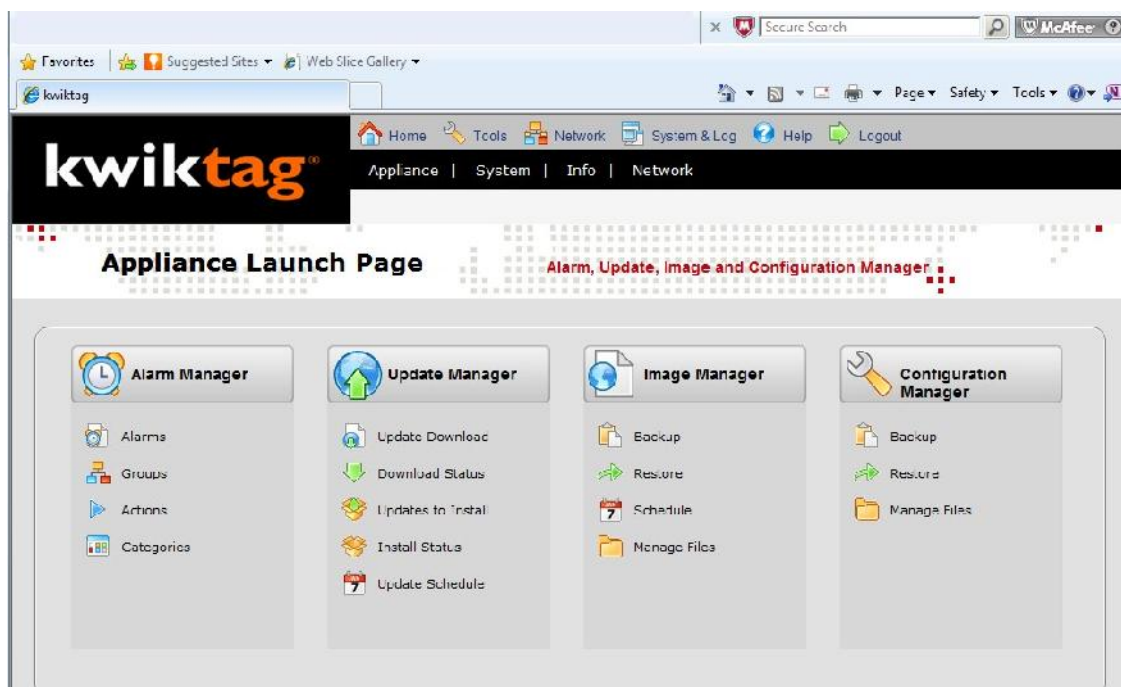- Password = Password$

3   The NEWS application will open.

Figure 7.9 – KwikTag NEWS Application

4   There are four main areas of the NEWS application:

- Alarm Manager

- Update Manager

- Image Manager

- Configuration Manager

The majority of the appliance setup has already been configured for you, however you will still use the **Update Manager** to download and install the KwikTag appliance updates.

5   Click on **Update Download** to view the available updates to download for the KwikTag appliance.

Figure 7.10 – Update Download

6   If there are available updates, select the ones you want to download by checking the box in front of each update. Click **Download** to begin the download process.

7   Click on the **Download Status** page to view the download progress of the selected updates.

Figure 7.11 – Download Status

Hint: Typically the appliance it set to automatically "Download and Approve" updates. If that is selected, then you will only see the available updates on the **Updates to Install** tab as the system will have automatically downloaded them for you.

8   Click on the **Updates to Install** page to select the downloaded updates to install on the KwikTag appliance. Click **Install** to begin the install process.
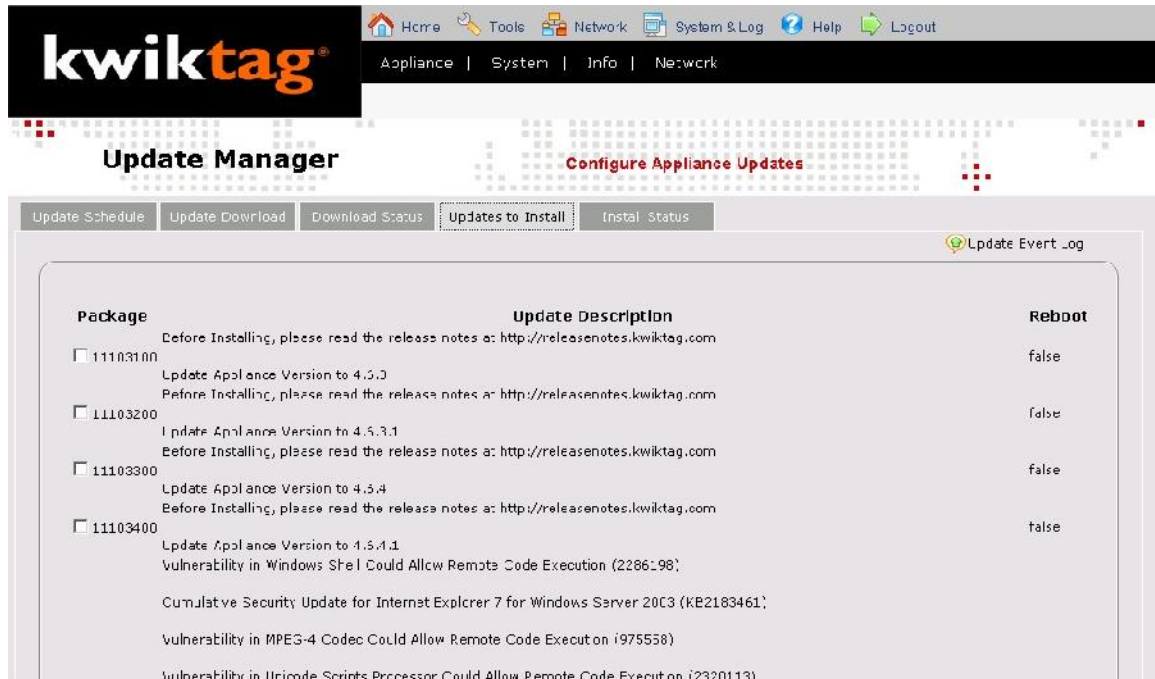

Figure 7.12 – Updates to Install

9   Click on the **Install Status** page to view the Install progress of the selected updates. The top section shows you the *Updates In Progress* and the bottom section lists the *Installed Updates*. Once all selected updates show in the *Installed Updates* section, your KwikTag appliance is up to date.
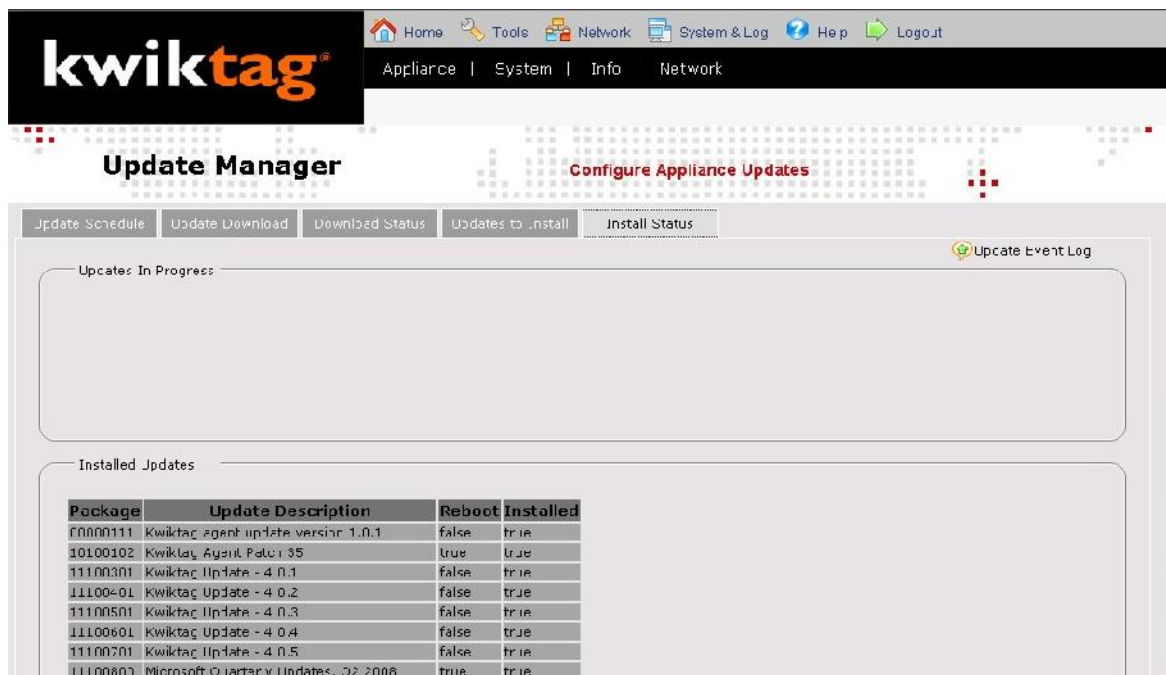

Figure 7.13 – Install Status

WORKFLOW

KwikTag allows you to create workflow routing and approvals based upon your business processes. These processes are documented during the implementation discovery sessions. The workflow within KwikTag is then configured by a Professional Services team member. Please reference the Workflow Admin Guide for more details on configuring workflow within KwikTag.

To view the configured workflow, click on the **Workflow** tab within the Admin tool.

Figure 8.0 – Workflow

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