



dynamics gp 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 GP 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

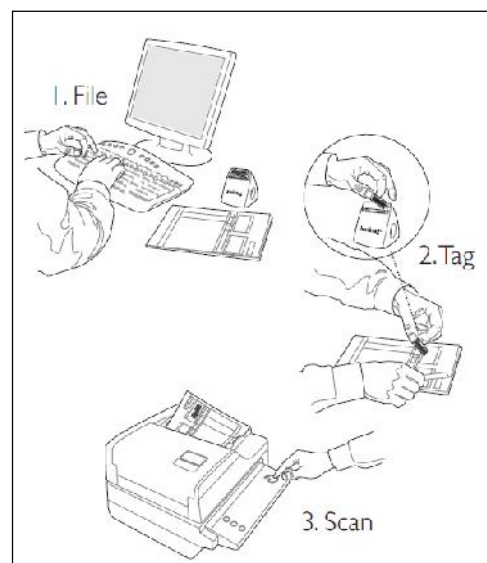
Enter filing/indexing instructions using KwikTag's client software.

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 GP 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 GP Embedded Client. Depending on your user license all of these features may not be available to you.

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GETTING STARTED

The KwikTag embedded client provides options within Microsoft GP 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 GP.

Alternately, for users relying on KwikTag workflow capabilities for routing and approving documents, KwikTag can populate a new Microsoft GP 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 GP. At that point, using the KwikTag embedded “Create” button within GP results in a new Microsoft GP 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 GP, creating new GP entries based on indexed data from approved KwikTag documents and searching for KwikTag documents within GP.

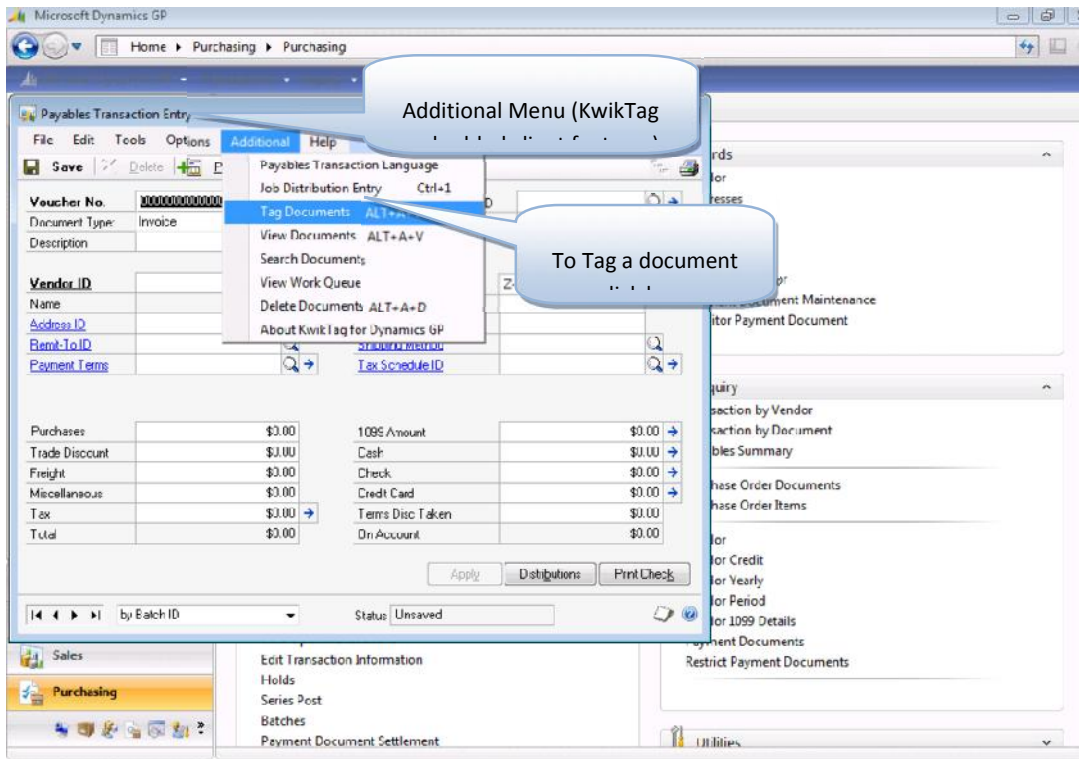
STEP 1: FILING A DOCUMENT AND ACCESSING KWIKTAG EMBEDDED CLIENT FEATURES

1. When using the KwikTag for MS Dynamics GP Embedded Client you will enter the document information into the GP 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 GP Form Screen you are filing to.
2. To access KwikTag embedded client features, click on the ‘**Additional**’ menu in GP (Figure 1). This menu includes a number of KwikTag-related options:
 - a. Tag documents (associate a document with a GP entry)
 - b. View documents (view any documents associated with a GP entry)
 - c. Search documents (look for any KwikTag documents associated with GP entries)
 - d. View Work Queue (view any documents that have been approved as part of a KwikTag workflow process)
 - e. Delete documents (remove any documents associated with an entry in GP)

STEP 2: TAGGING A DOCUMENT

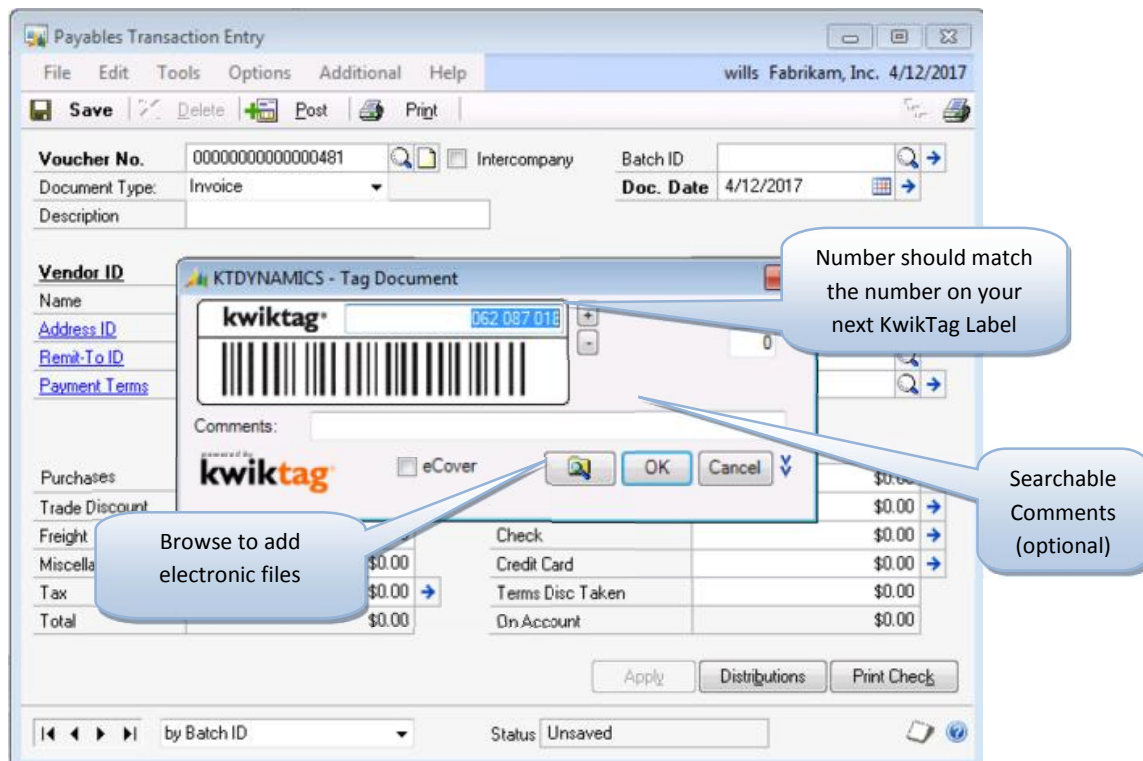
HOW TO TAG A PAPER DOCUMENT

1. Click on the 'Additional' menu in GP (Figure 1)



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Figure 1: KwikTag GP embedded client

- The KwikTag window will open (Figure 2)



Since the barcode number on the label from the KwikTag Label Dispenser ties the filing information (from Step 1: “Filing a Paper 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 in your KwikTag Label Dispenser to be placed on the document. 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 only goes on the first page.

- Click the **Tag** button (Figure 2)
- Remove any staples and/or paperclips and place the document in your KwikBasket
- Complete processing the transaction in GP

HOW TO TAG AN ELECTRONIC DOCUMENT

Sometimes you do not have a paper document that you want to file. Electronic documents are filed into GP 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.

- As described above, click on the Additional menu and select the Tag Documents option (Figure 1)

2. The 'KwikTag' window will open (Figure 2)
3. **OPTION 1** – BROWSE to find the document:
 - a. Click on the **Tools Menu**, choose 'Add Electric File...' (Figure 4) and navigate to the location of the document. Double click on the document or select it and click **Open** (Figure 5)

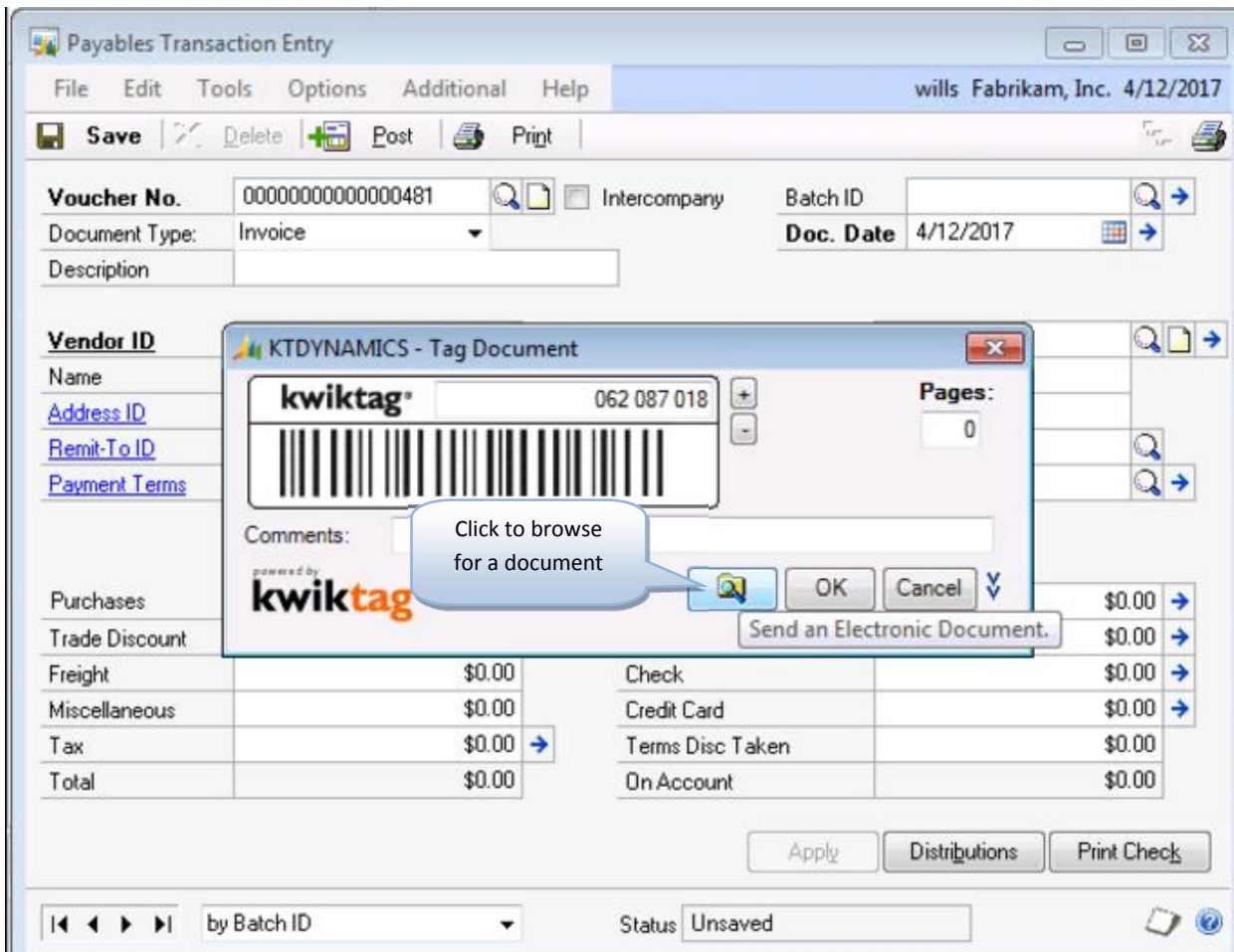


Figure 5

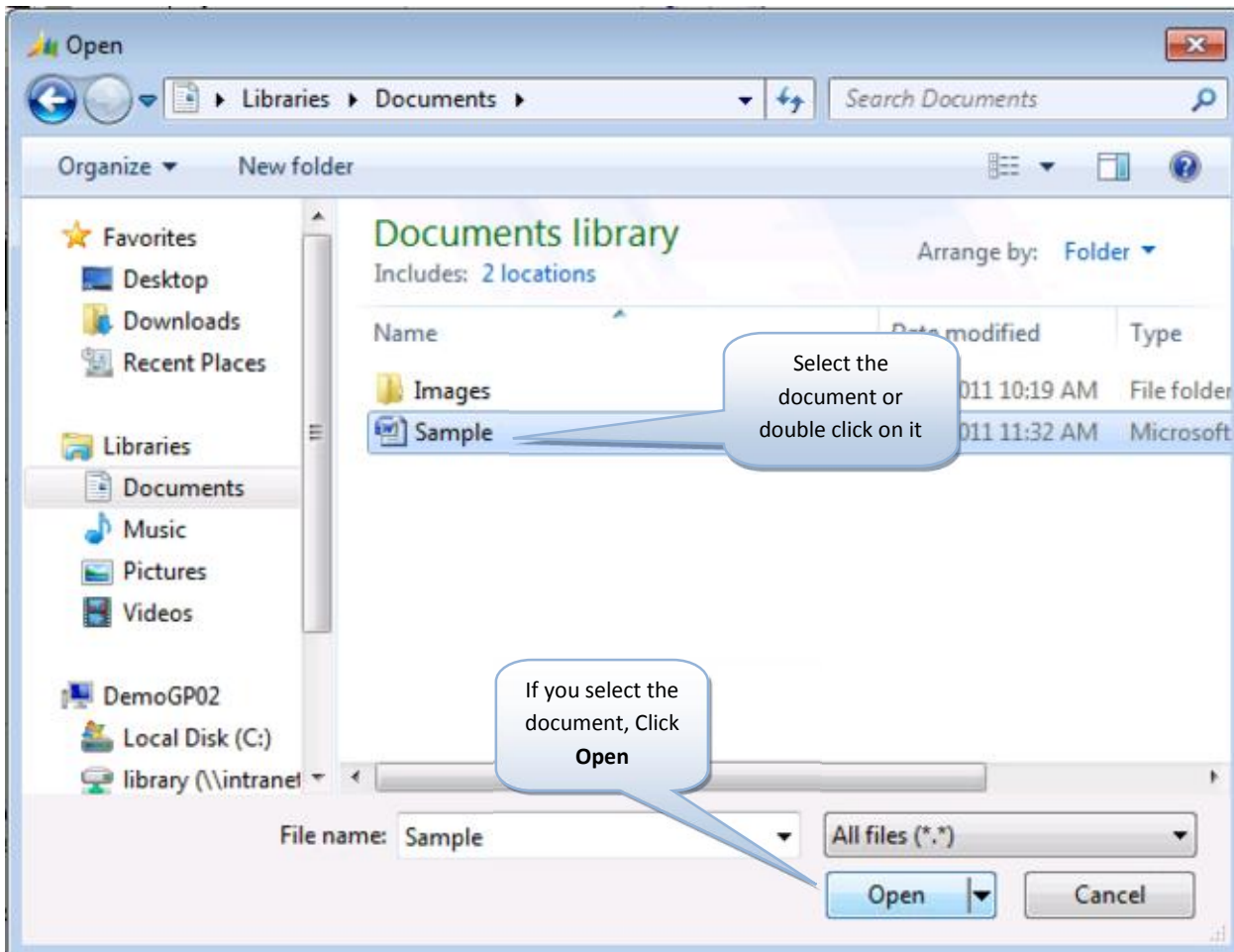


Figure 6

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 7). This will cause the 'KwikTag' window to reappear, then continue to drag the email into the window and release it.

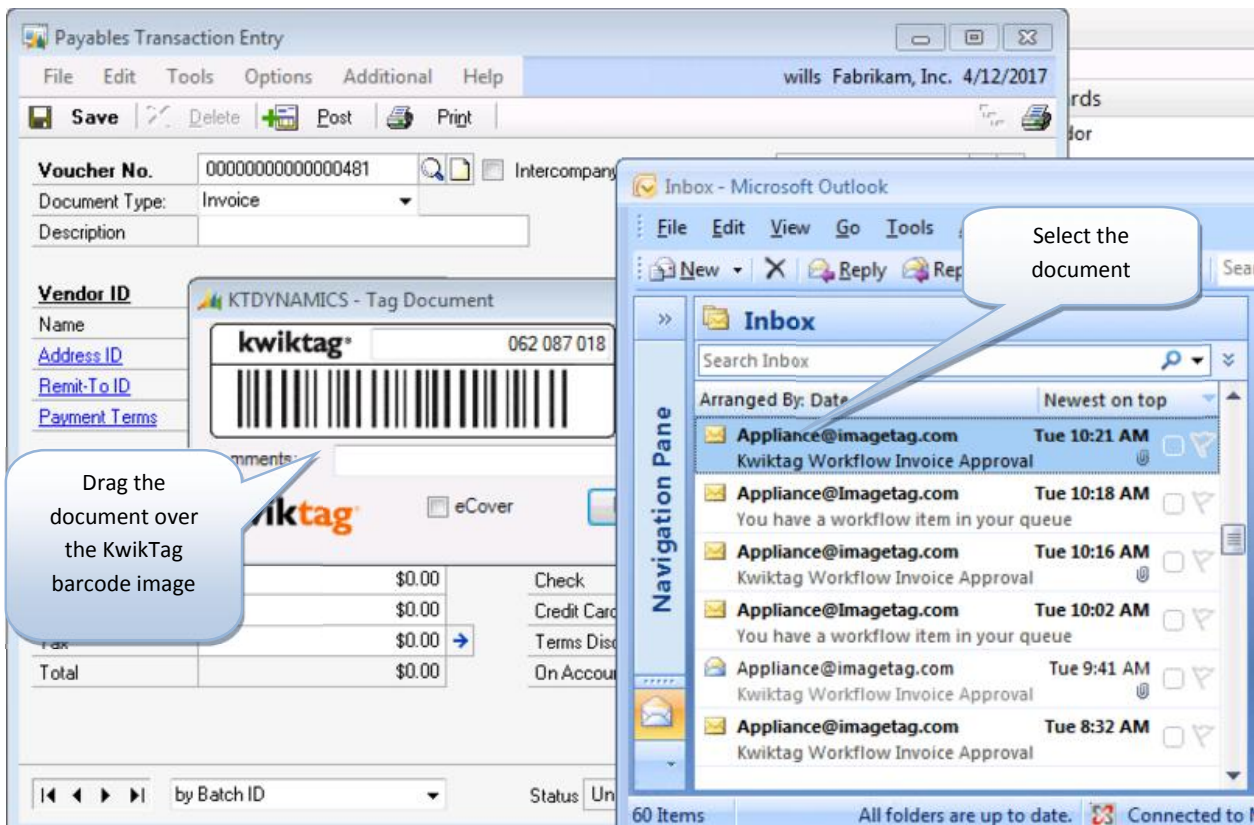


Figure 7

5. A confirmation window will open (Figure 8)



Figure 8

6. Click **Yes** to continue or **No** to cancel
7. Complete processing the transaction in GP

STEP 3: SCANNING THE TAGGED DOCUMENT

1. Scan the documents on a scanner that has been configured to scan to KwikTag.

HOW TO VIEW DOCUMENTS

- 1) From the Microsoft GP screen associated with the document you want to view, select the Additional **menu** and choose 'View Documents' (Figure 8)

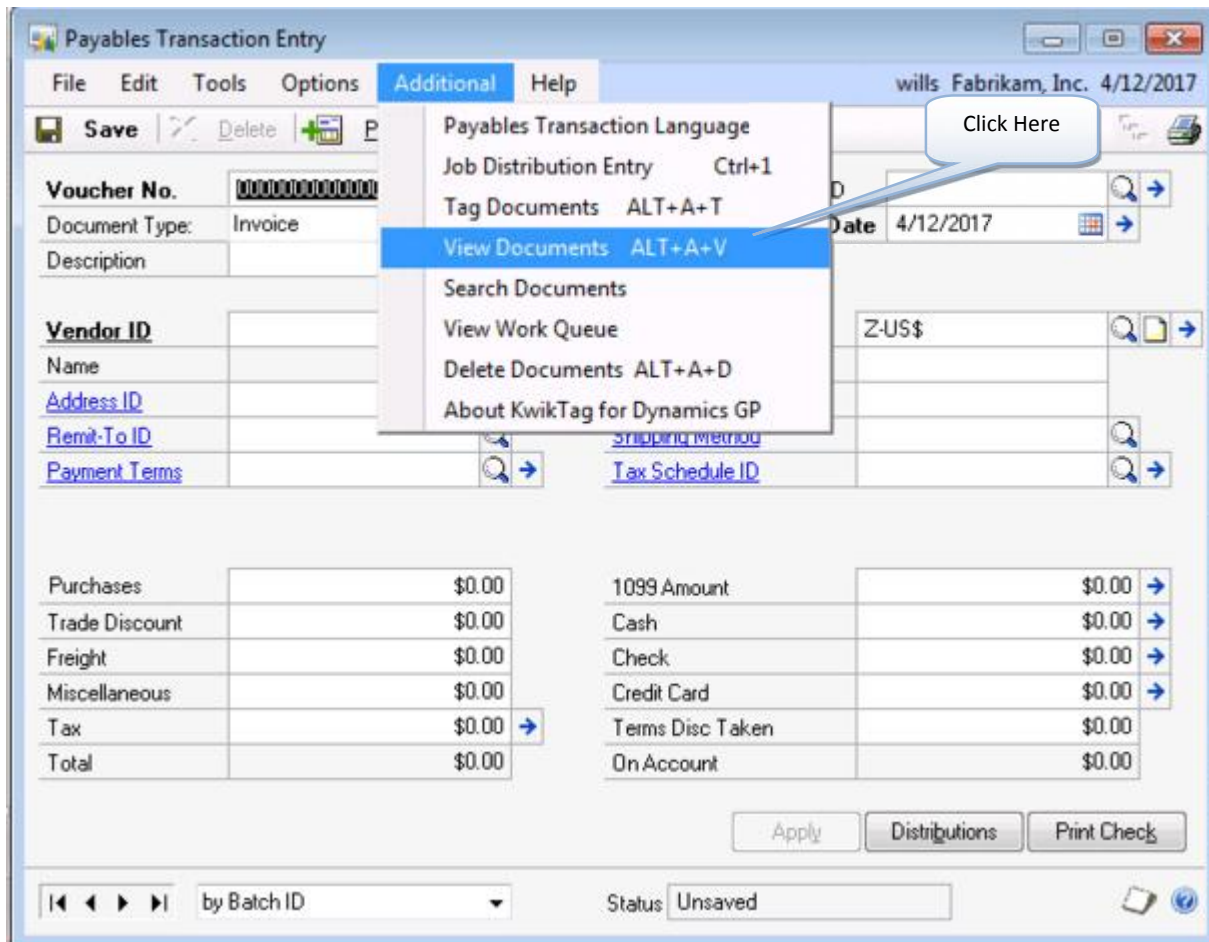


Figure 8

- 2) If there is only a single document associated with this entry it will open for viewing. If there are multiple documents The 'View Documents' window will open listing all of the documents that are associated with the currently displayed GP form (Figure 9)

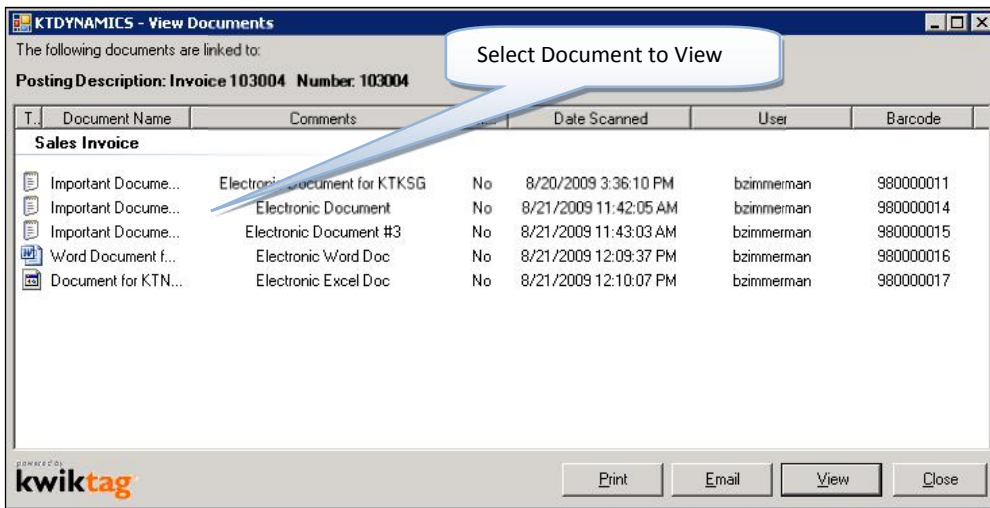


Figure 9

- 3) Select the document that you want to view and:
 - a) right click and select **View**
 - or
 - b) Click on the 'View' button
 - or
 - c) Double click on the document
- 4) From this screen you can also choose to 'Email' or 'Print' the document
- 5) Click **Close** to close the 'View Documents' window

If, when attempting to view a document you receive the following message (Figure 10):

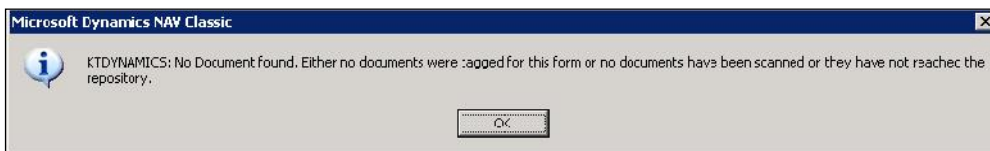


Figure 10

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 GP Form.

1. Select the **Additional** menu and choose 'Search Documents' (Figure 11)

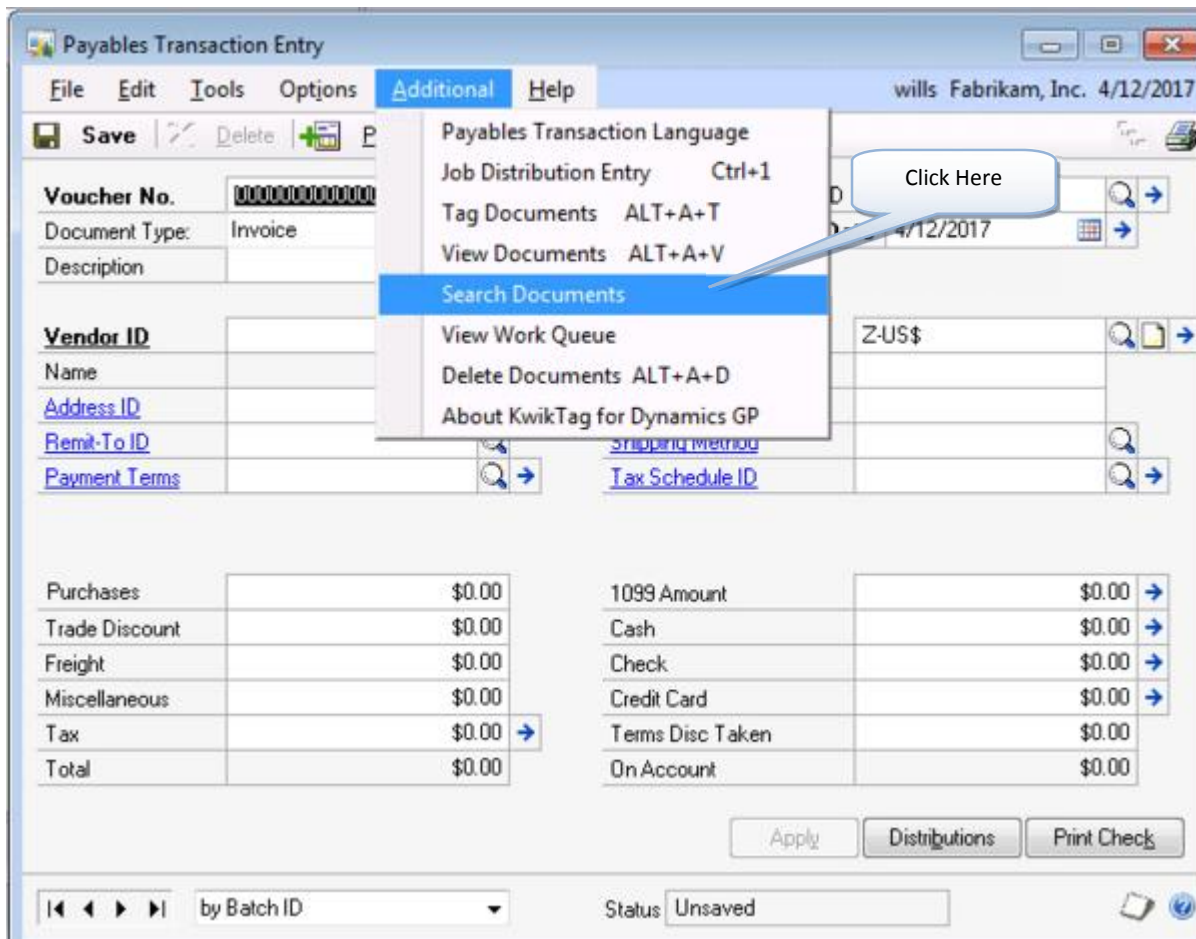


Figure 11

2. Enter the search criterion (Figure 12)

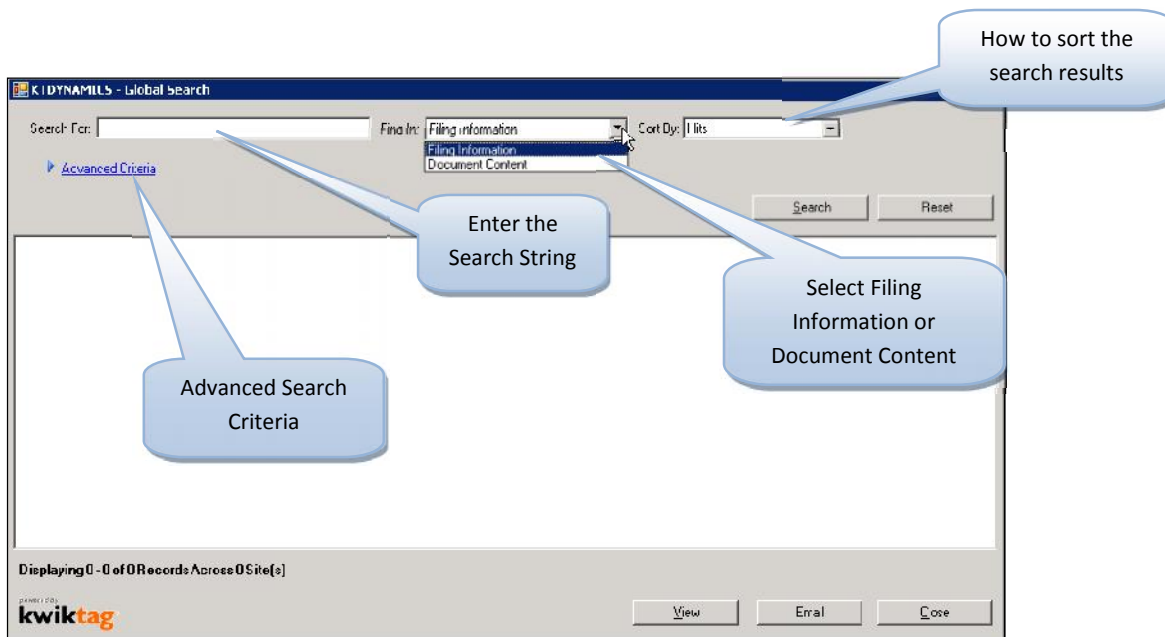


Figure 12

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)

4. You can also narrow your search by clicking on **Advanced Criteria** (Figure 13)

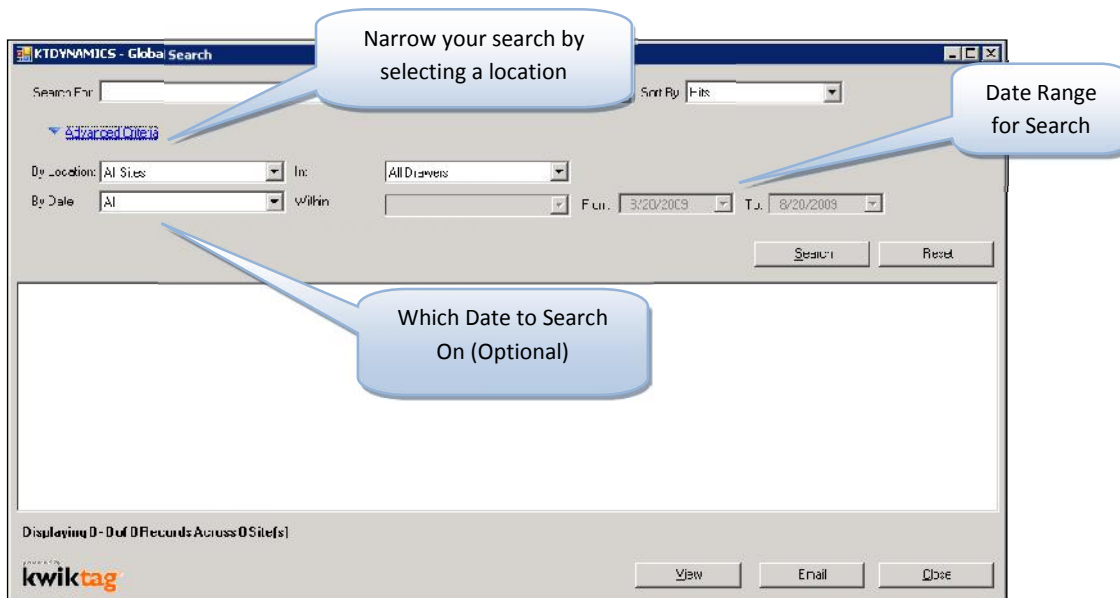


Figure 13

- a. You can narrow your search by selecting the **'By Location'** (Site) that you want to search on. A Site could be a company that you have access to. Under **'By Location'** you will only see the Sites that you can access
 - i. If you choose a location other than **'All Sites'** you can select a specific drawer to search on by selecting the drawer from the drop down (Figure 14)

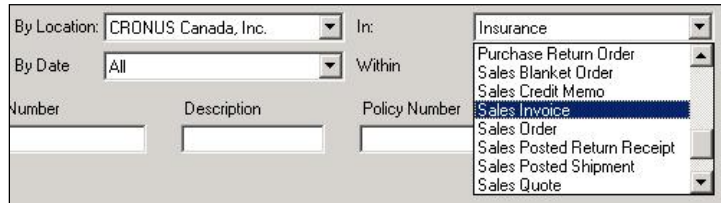


Figure 14

- b. You can search on **'All'** dates or to search on a date type, from the drop down **'By Date'** you can select which date you want to use for the search (Figure 15)

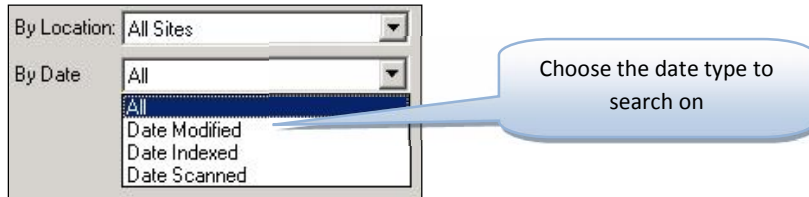


Figure 15

- c. If you choose a date type other than **'All'** you can select on a **'Date Range'** or a specific period of time. 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 16)

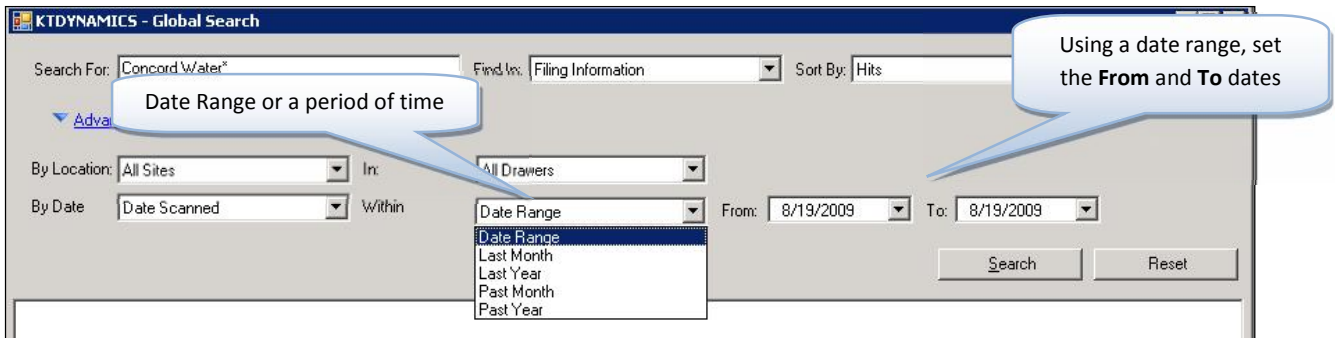


Figure 16

5. Click **Search**

Figure 17 shows a return searching on '103004' looking in 'Filing Information'.

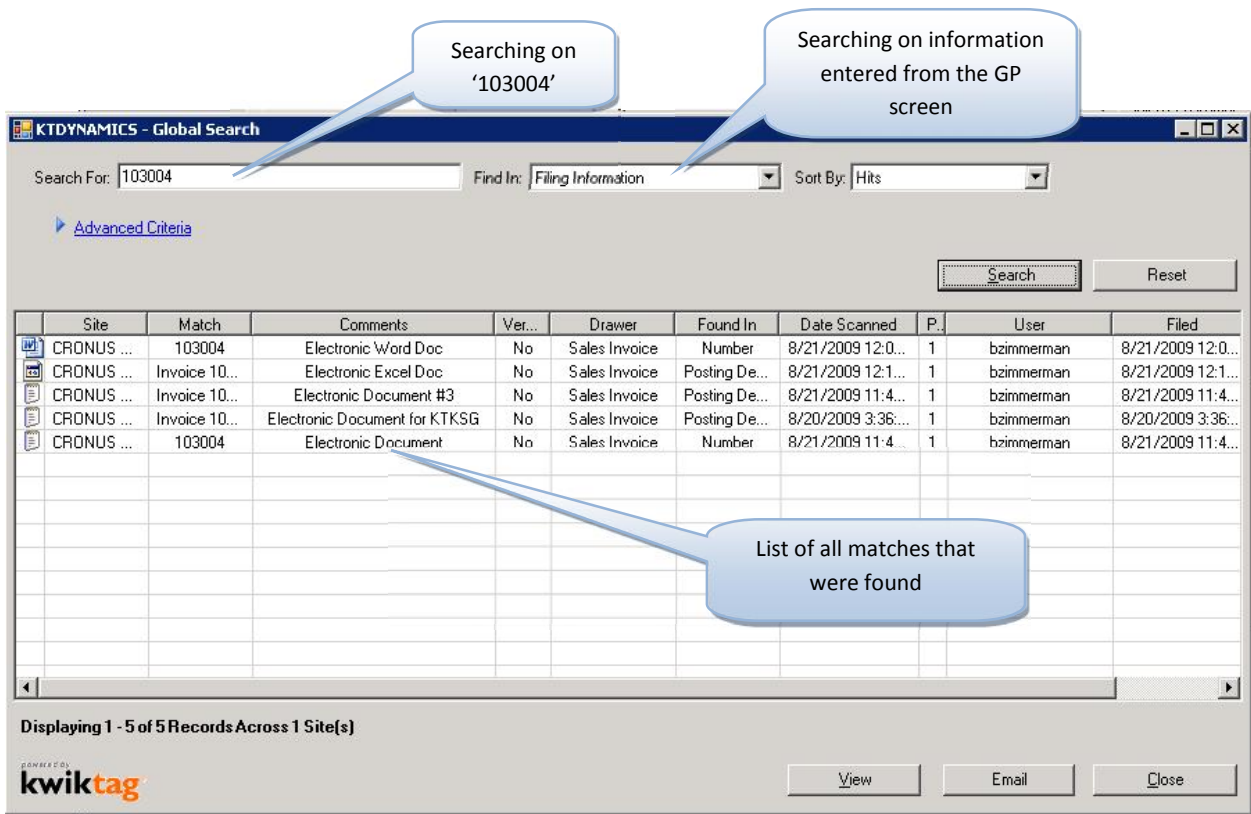


Figure 17

From the search results window you can:

1. View - Select the document and:
 - a) Right click and select **'View'**
 - or
 - b) Click on the **'View'** button
 - or
 - c) Double click on the document
2. Email - Select the document and:
 - a) Right click and select **'Send to Recipient(s)'**
 - Or
 - b) Select the document and click on **'Email'**
3. Click **'Reset'** to clear the search criteria
- or
4. Click **'Close'** to close the 'Global Search' window

THE KWIKTAG GP WORK QUEUE

For users who rely on KwikTag's workflow capabilities to route documents for approval, the KwikTag GP embedded client provides a view of approved documents that can either be tagged to an entry in GP, 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 GP work queue and associate it with an entry in GP, complete the following steps:

- 1) From the Microsoft GP screen associated with the document you want to tag, select the **Additional** menu and choose 'View Work Queue' (Figure 18)

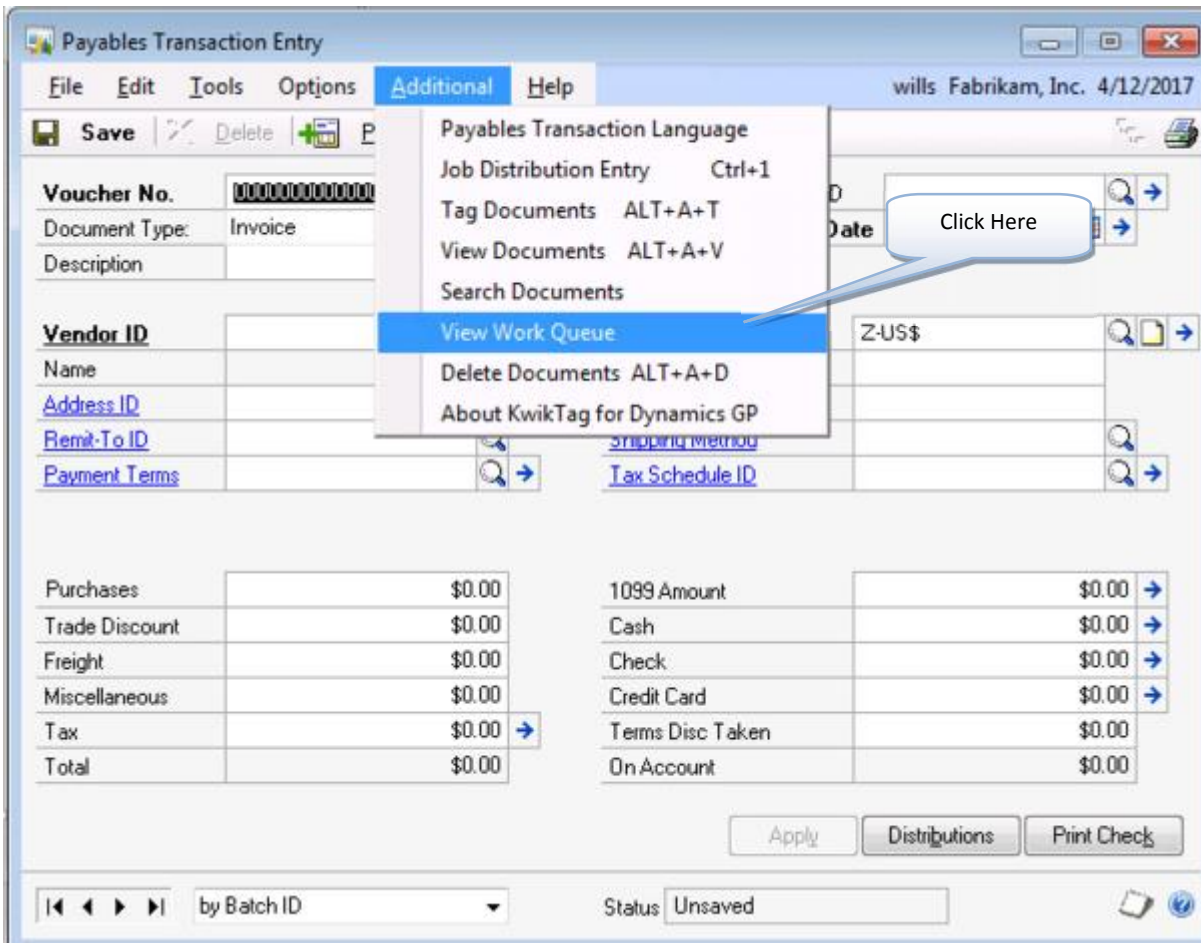


Figure 18

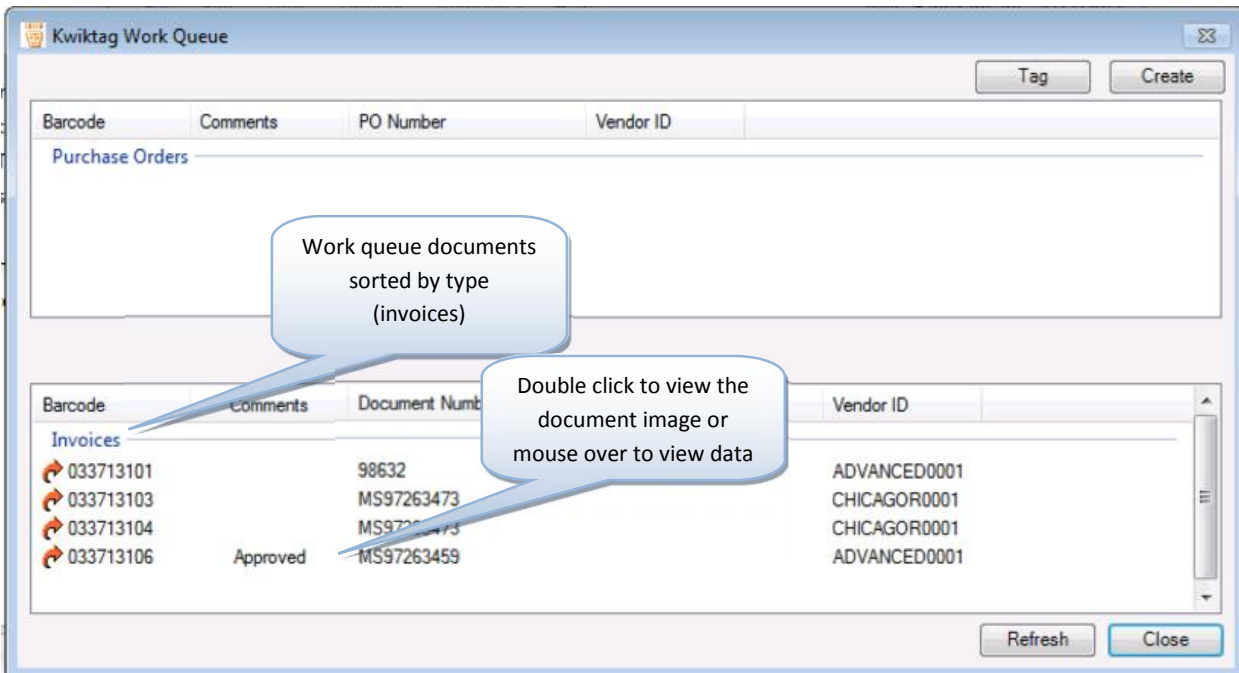


Figure 19

- 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 (Figure 19). You can double-click on a document line to open and view the document, or simply mouse over the line item to view any relevant indexed data (Figure 20)

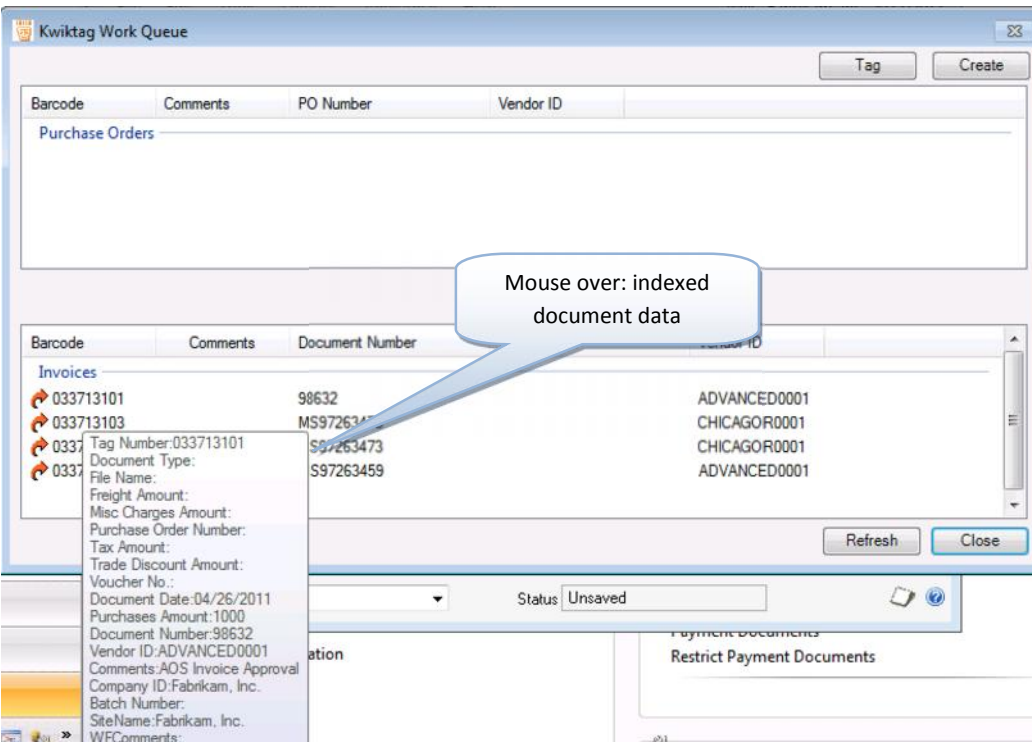


Figure 20

- 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 21).

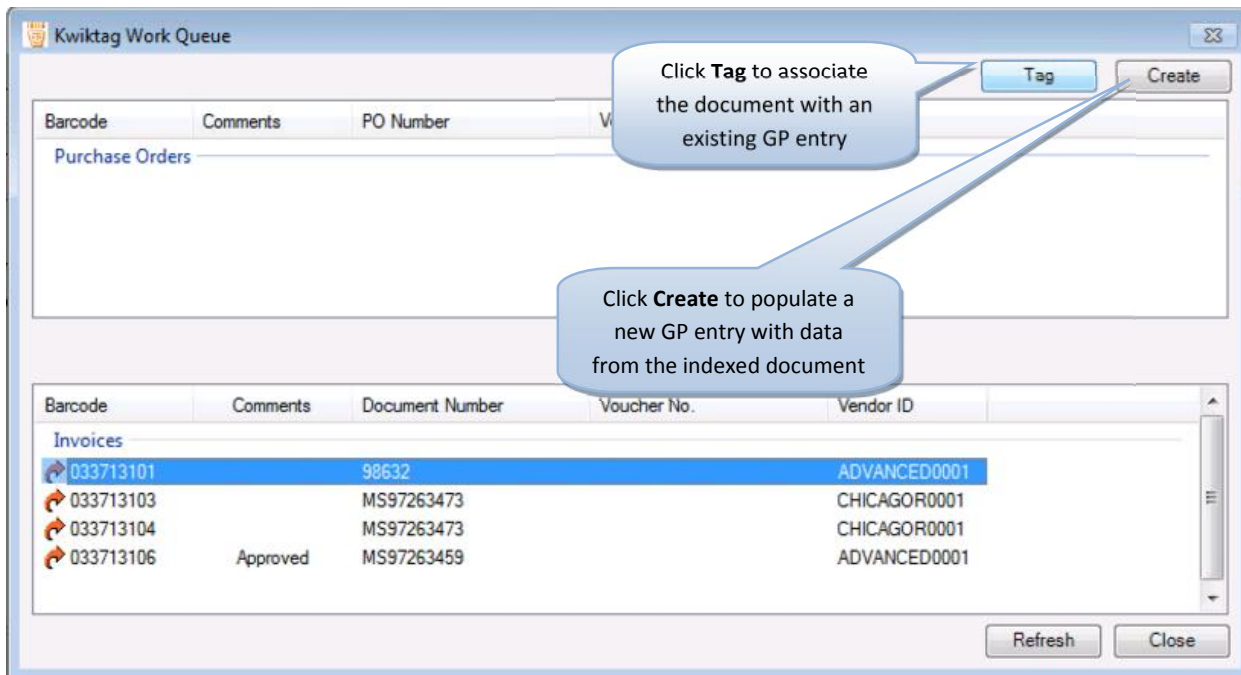


Figure 21

CREATE A NEW GP ENTRY FROM THE WORK QUEUE

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

- 1) From the Microsoft GP screen associated with the document you want to tag, select the Additional **menu** and choose '**View Work Queue**' (Figure 22)

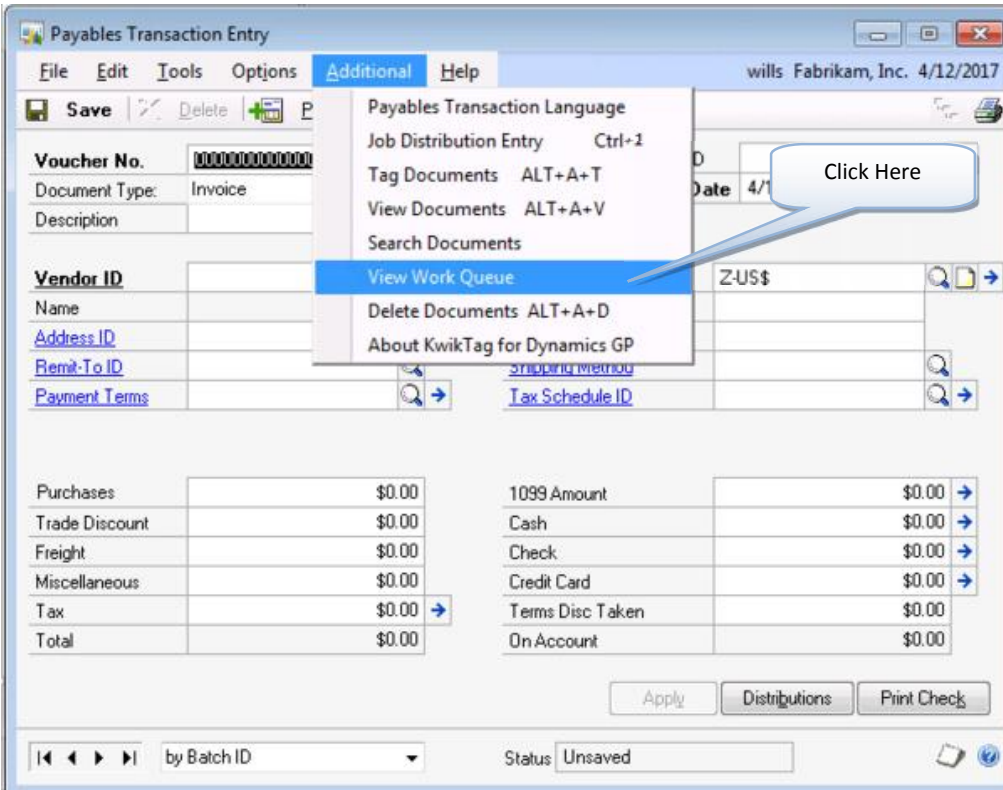


Figure 22

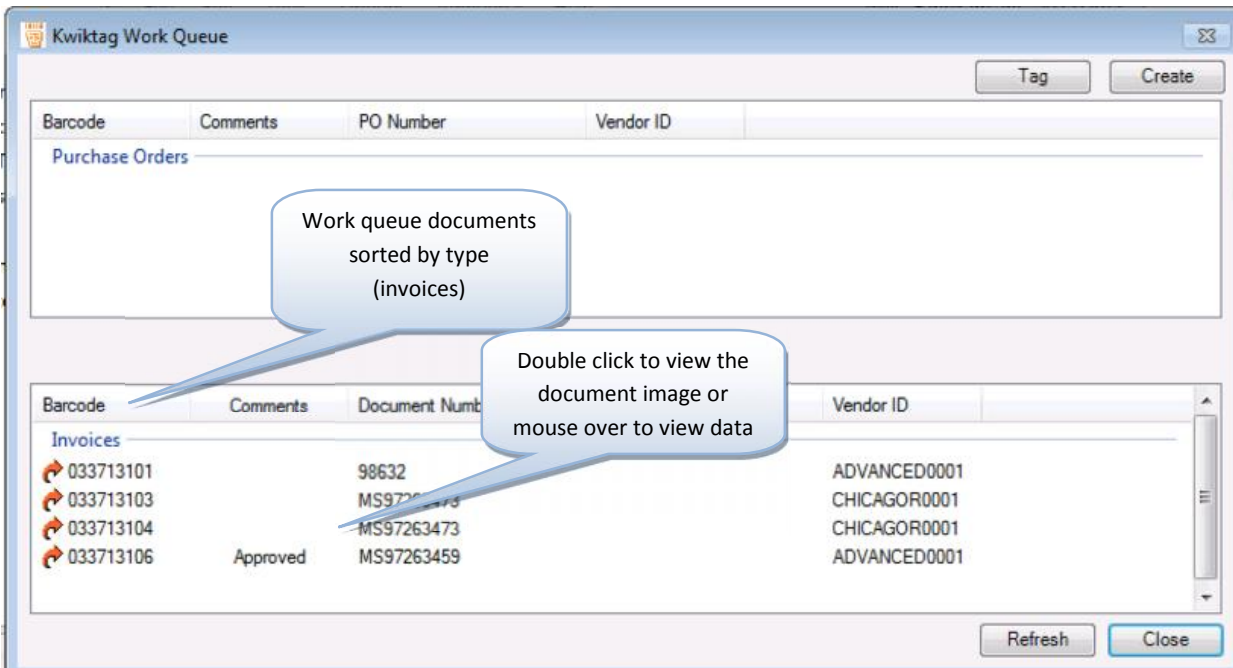


Figure 23

- 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 (Figure 23). You can double-click on a document line to open and view the document, or simply mouse over the line item to view any relevant indexed data (Figure 24)

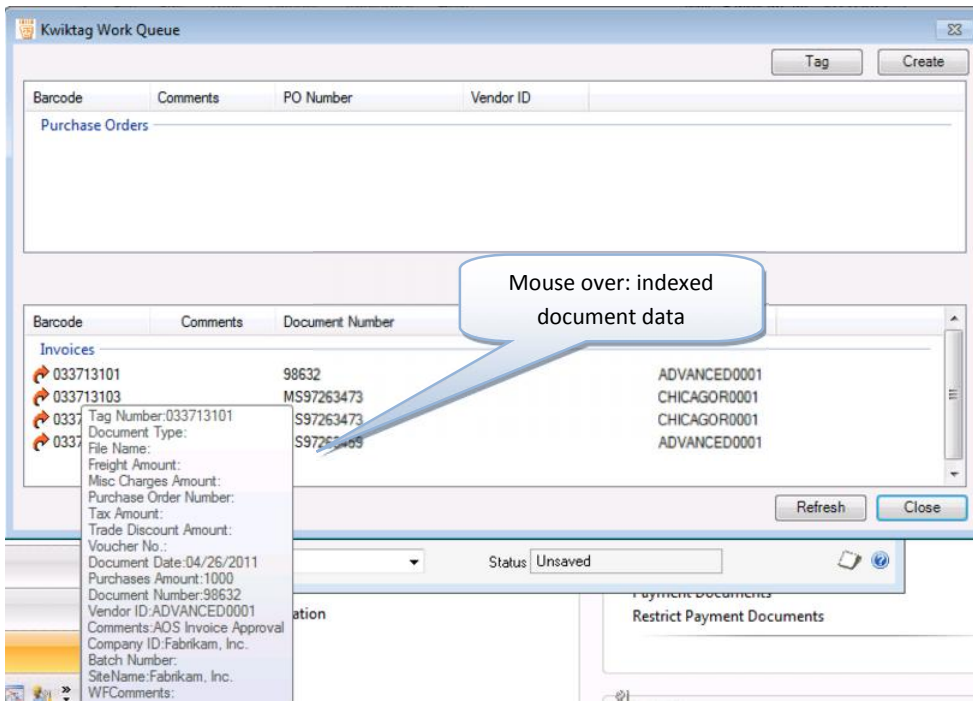


Figure 24

- 3) To create a new entry in GP, simply click the **Create** button located in the upper left hand side of the work queue window (Figure 25).

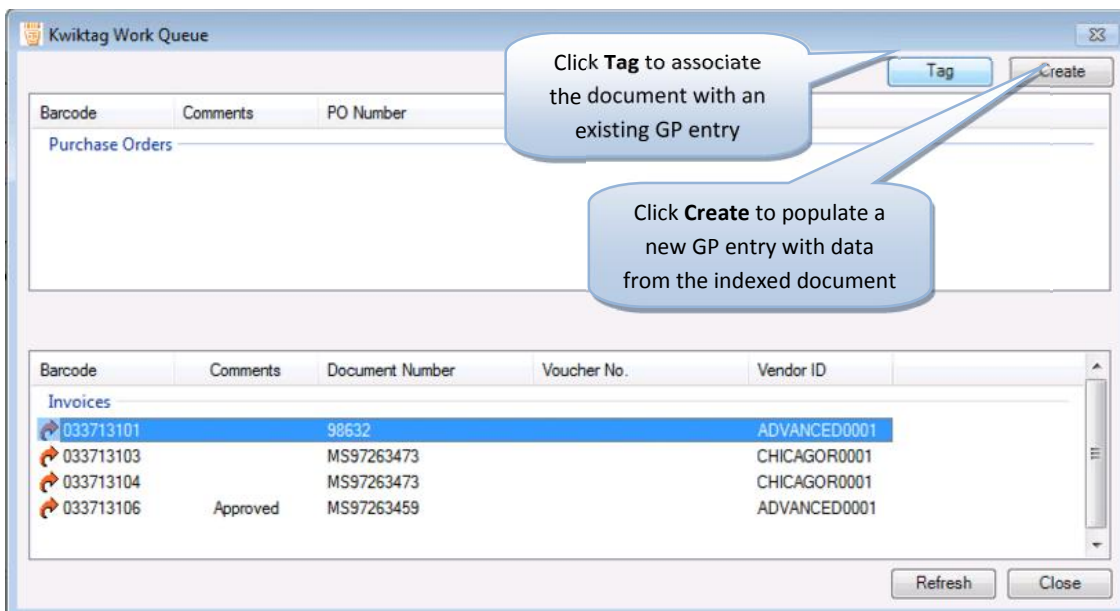


Figure 25

- 4) To create a new entry in GP, 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.
- 5) To complete the create process, simply select an existing batch to which you want to assign your new entry, or enter a name for a new batch (Figure 26).

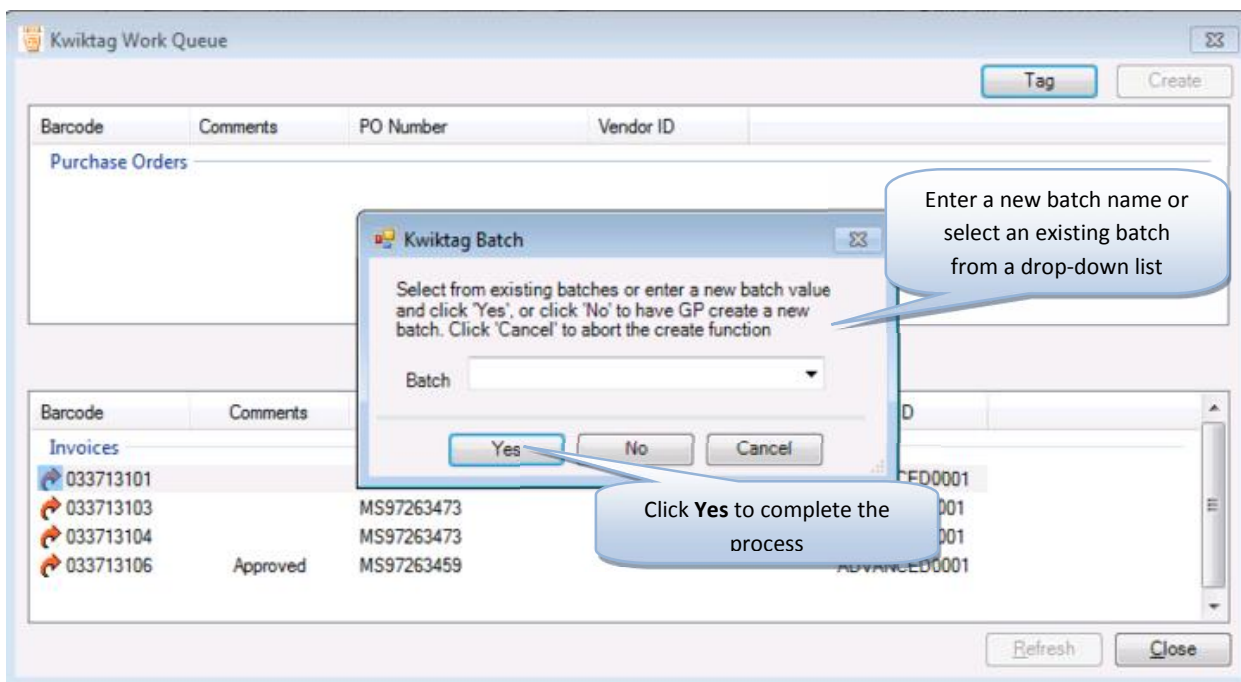


Figure 26

Once the process is complete, KwikTag will create a new entry in GP to a new or existing batch, 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.

This concludes the KwikTag GP Embedded Client Users Guide.

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



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