



dynamics nav client user guide

Version 4.6.5x

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 NAV 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

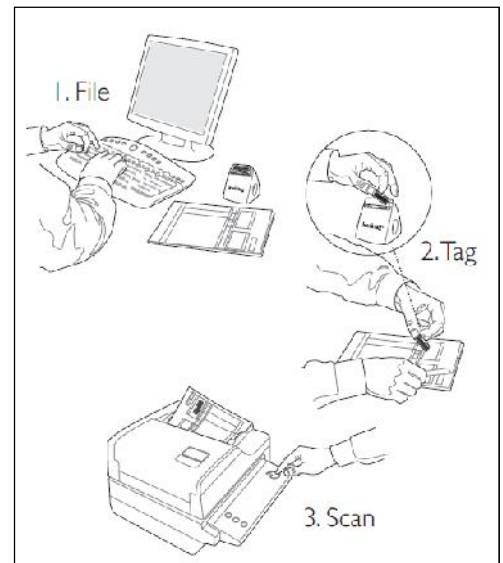
Enter filing/indexing instructions using KwikTag's client software.

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 NAV 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 NAV 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	6
How to Tag a Paper Document	6
How to Tag an Electronic Document	7
Step 3: Scanning the Tagged Documents.....	10
Viewing a Document.....	11
Searching for a Document	13
The KwikTag NAV Work Queue.....	17
Tagging a Document from the Work Queue.....	17
Create a new NAV Entry from the Work Queue	18

GETTING STARTED

The KwikTag NAV embedded client provides options within Microsoft NAV 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 NAV.

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

HOW TO FILE A DOCUMENT

STEP 1: FILING A DOCUMENT

1. When using the KwikTag for MS Dynamics NAV RTC Embedded Client (also called the KwikTag Window in this guide) you will enter the document information into the NAV RTC 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 NAV RTC 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

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

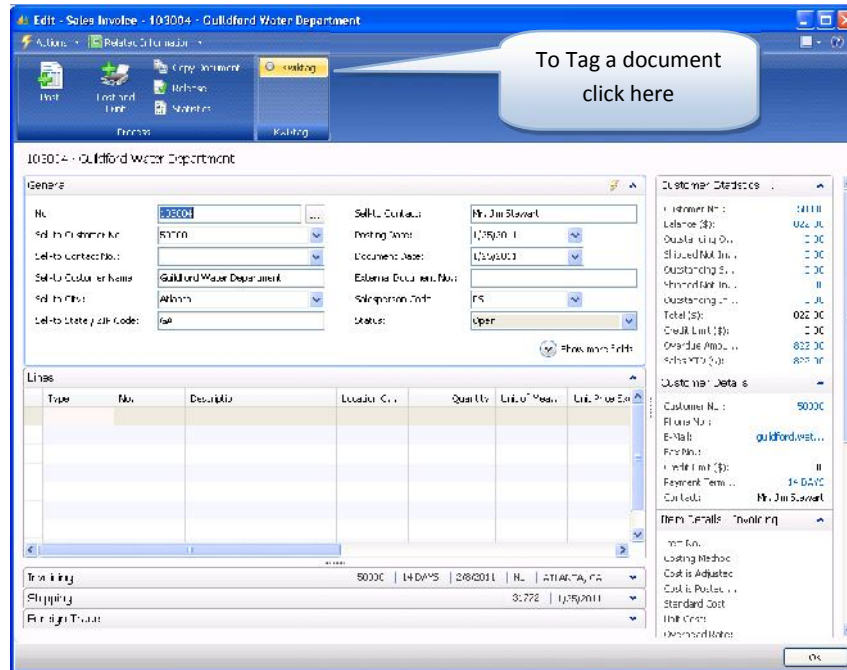


Figure 1

2. The KwikTag window will open (Figure 2)

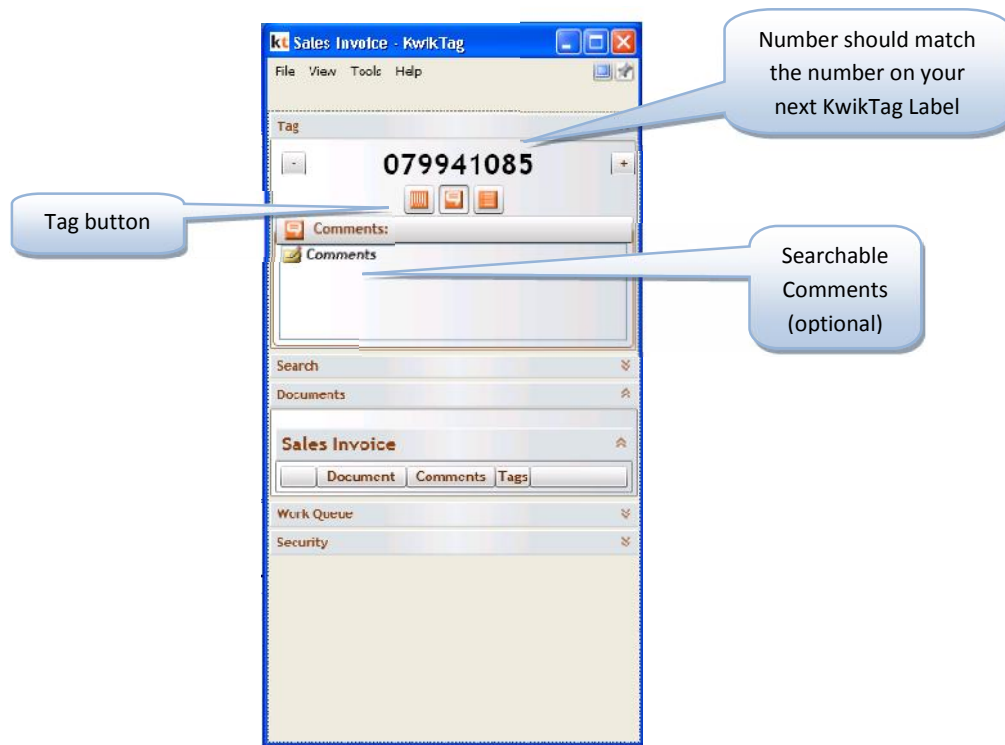


Figure 2

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 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 should be affixed only on the first page.

3. Click the **Tag** button (Figure 2)
4. Remove any staples and/or paperclips and place the document in your KwikBasket
5. Complete processing the transaction in NAV RTC

HOW TO TAG AN ELECTRONIC DOCUMENT

Electronic documents can also be filed into NAV RTC 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 3)



Figure 3

2. The 'KwikTag' window will open (Figure 4)

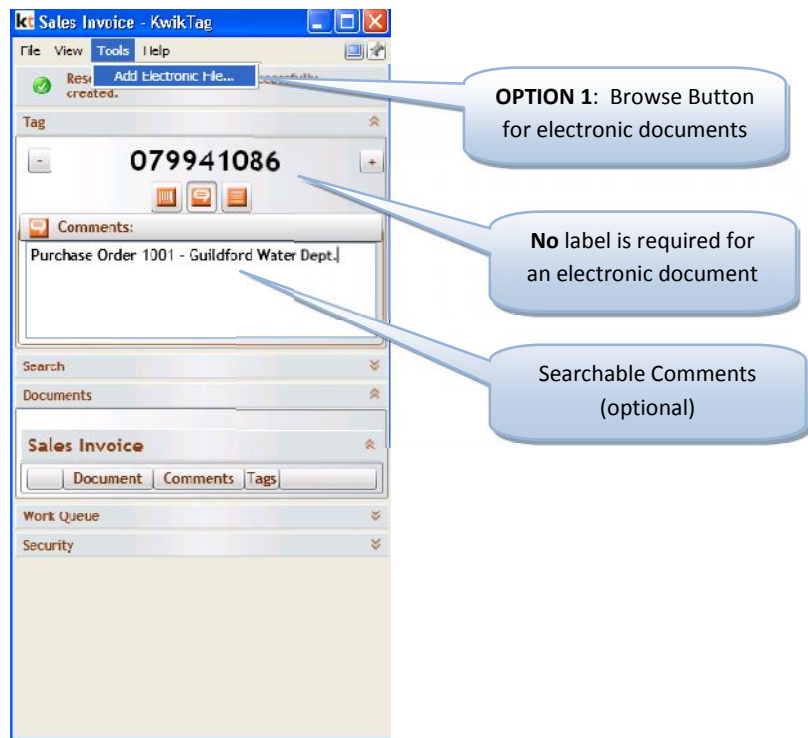


Figure 4

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

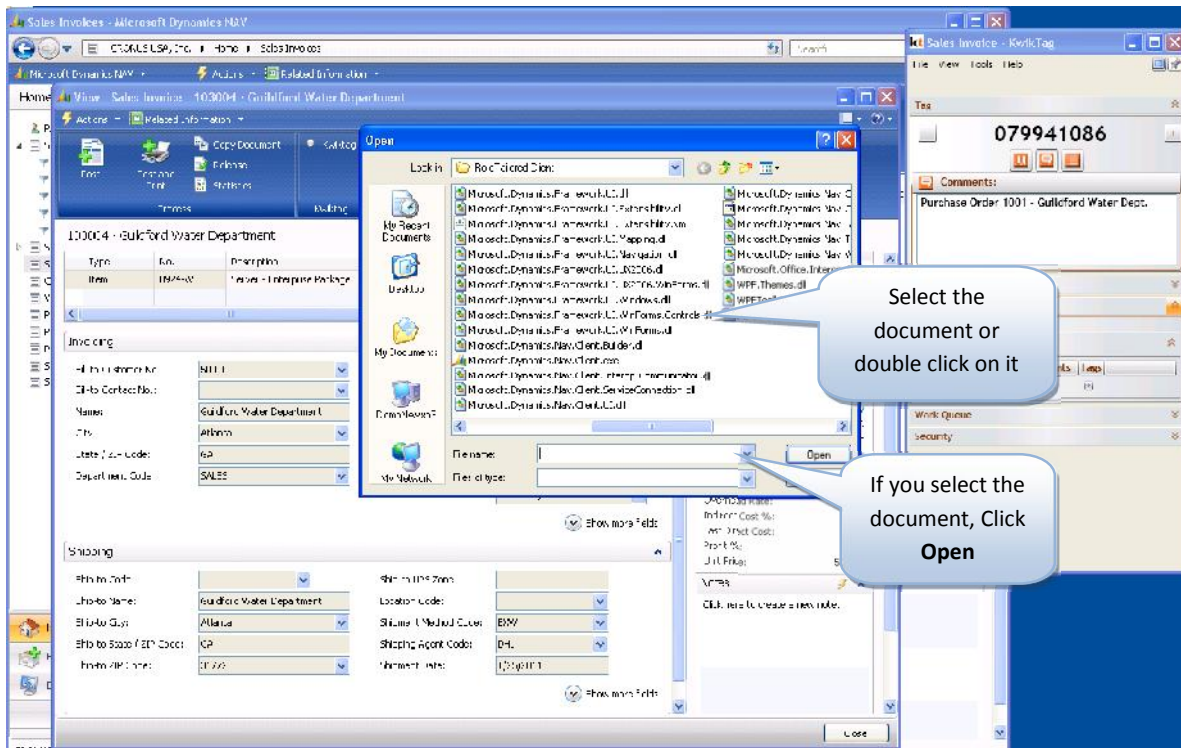


Figure 5

- a. A confirmation window will open (Figure 6)



Figure 6

- b. Click **Yes** to continue or **No** to cancel

4. **OPTION 2 – DRAG and DROP** (used to file emails or other existing electronic documents):
 - 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; continue to drag the email into the window and release it.

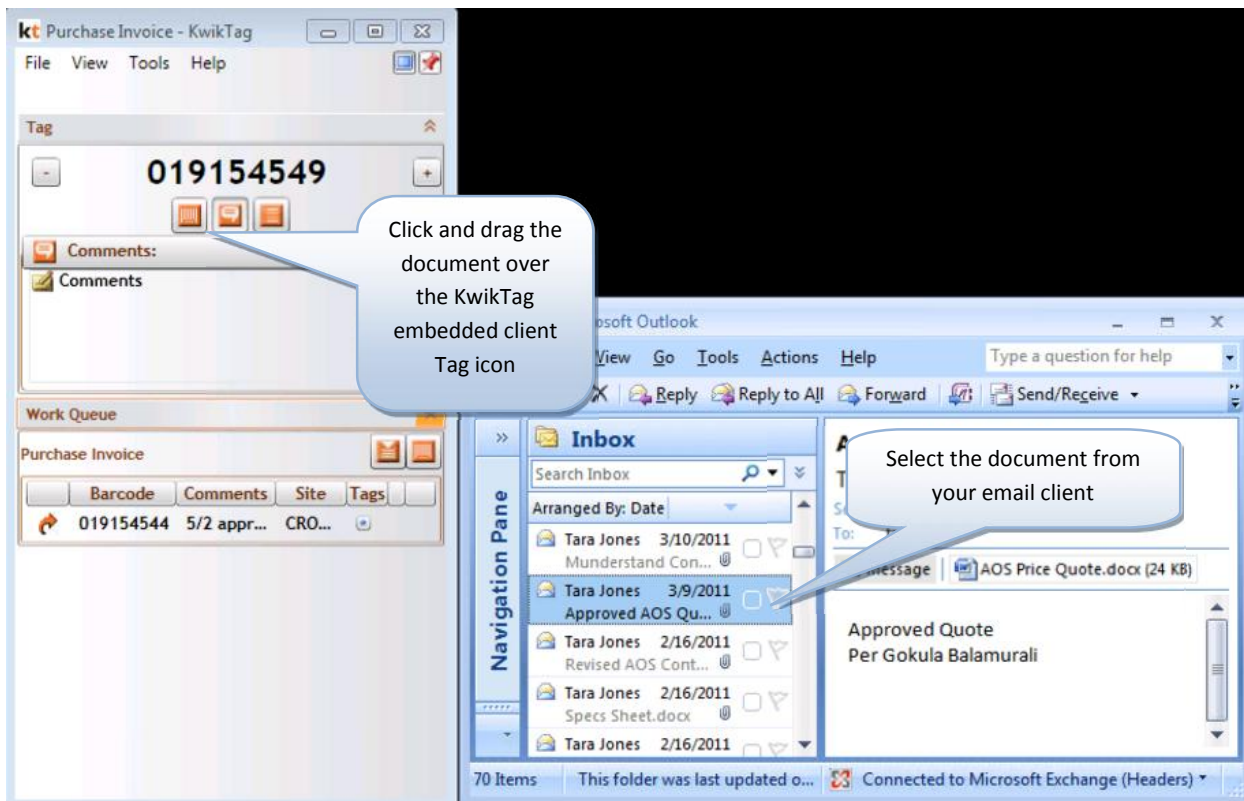


Figure 7

- Confirmation that a reservation has been successfully made will appear at the top of the 'KwikTag' window every time you add a document, paper or electronic. (Figure 8)

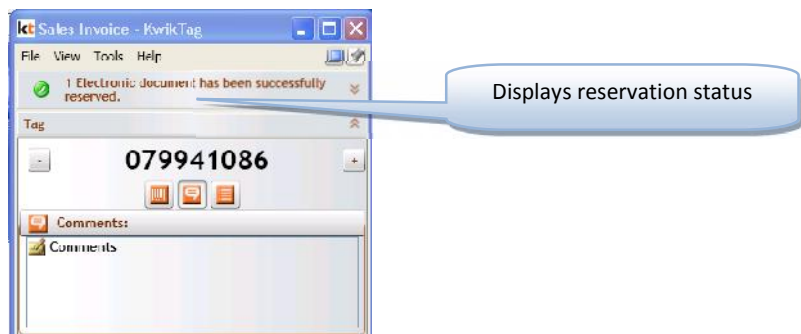


Figure 8

- Complete processing the transaction in NAV RTC.

STEP 3: SCANNING THE TAGGED DOCUMENTS

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

VIEWING A DOCUMENT

- 1) You can view documents from the 'KwikTag' window by double clicking the document you would like to view. (Figure 9)

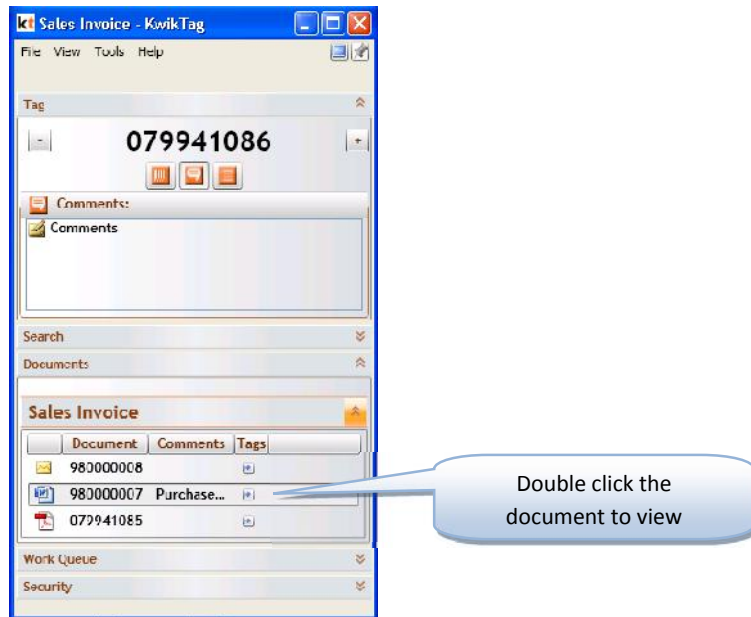


Figure 9

- 2) The Documents section in the 'KwikTag' window displays all documents associated with the currently displayed NAV RTC form.
- 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 10)

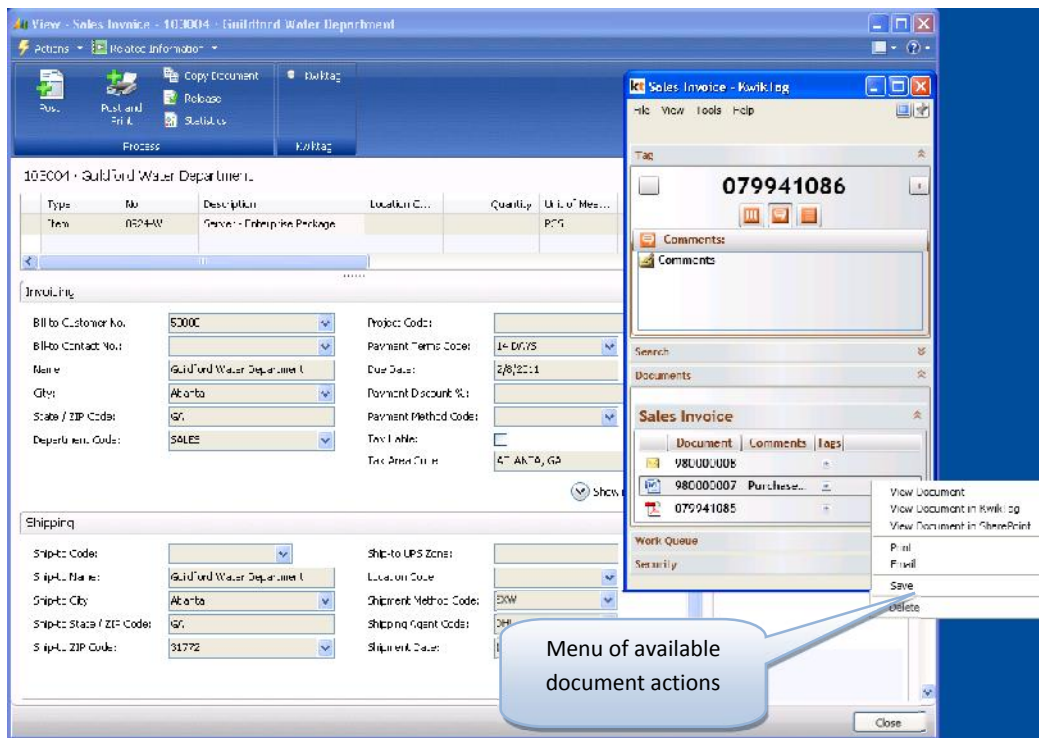


Figure 10

If when attempting to view a document you receive the following message (Figure 11)

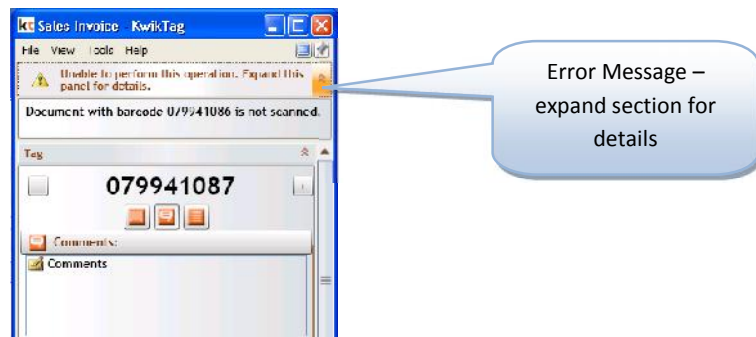


Figure 11

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 NAV RTC Form.

1. Expand the 'Search' section of the 'KwikTag' window (Figure 12)
2. Enter the search criterion
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)

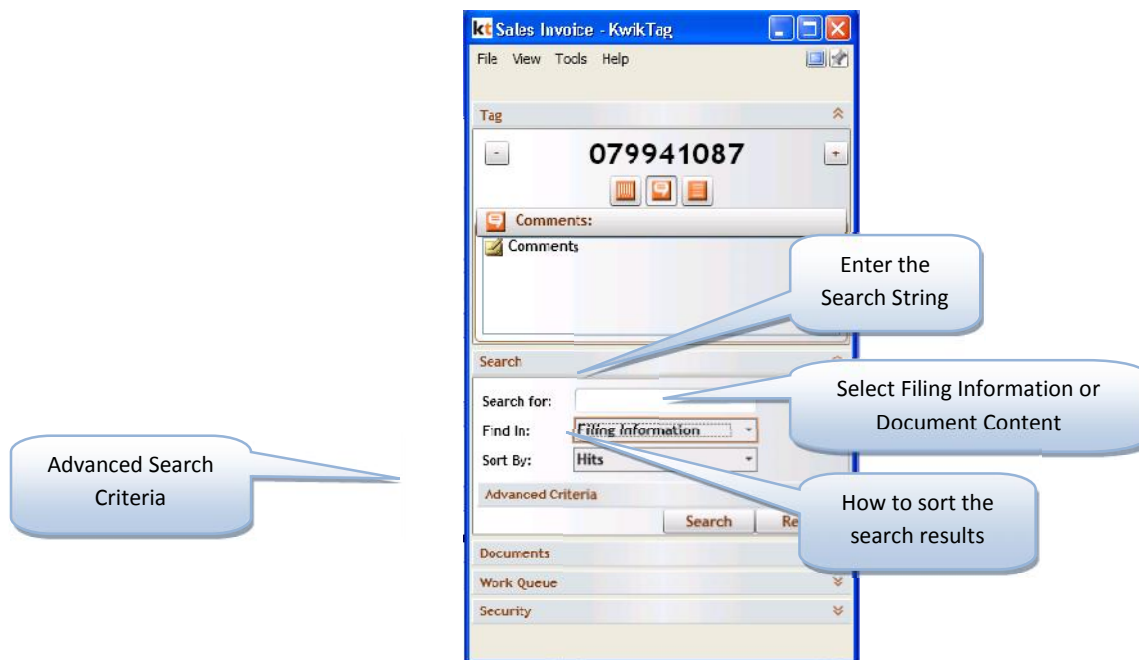


Figure 12

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

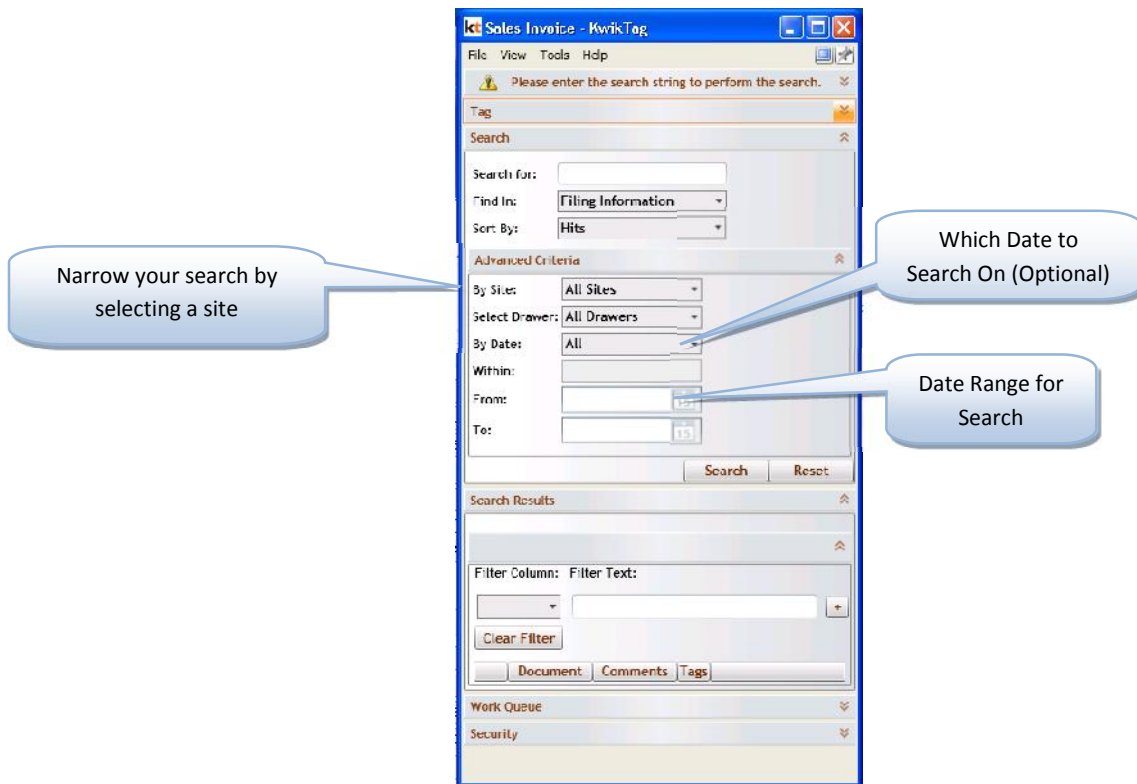


Figure 13

- a. You can narrow your search by selecting the site you want to search on. Under '**By Sites**' you will only see the Sites that you can access
 - i. If you choose a site you can select a specific drawer to search in by selecting the drawer from the drop down (Figure 14)

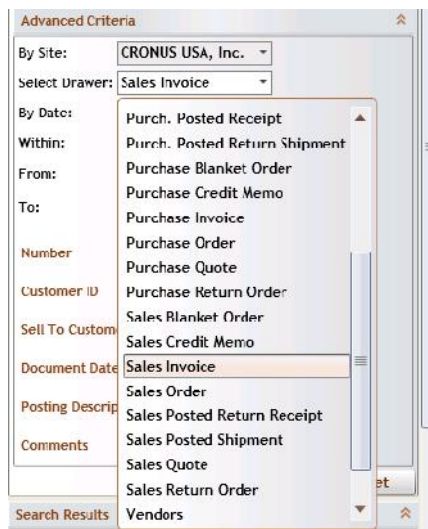


Figure 14

- 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)

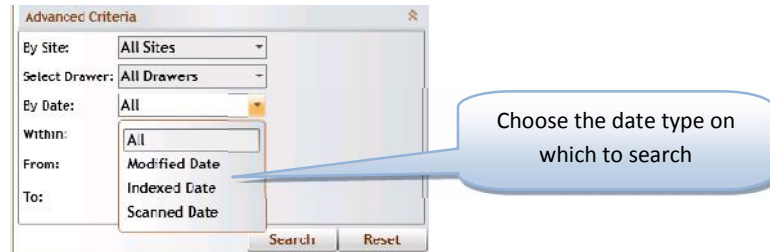


Figure 15

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

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 17)

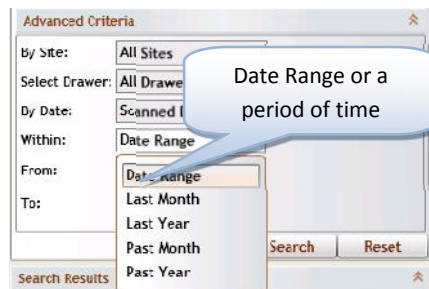


Figure 16

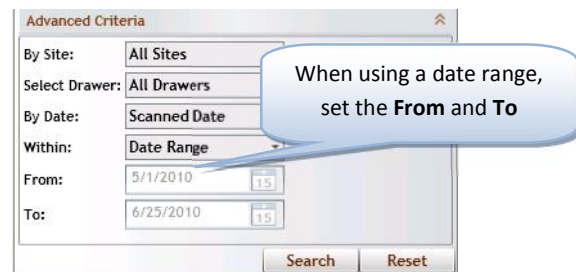


Figure 17

5. Click **Search**

Return search for "Invoice" looking in 'Filing Information'. (Figure 18)

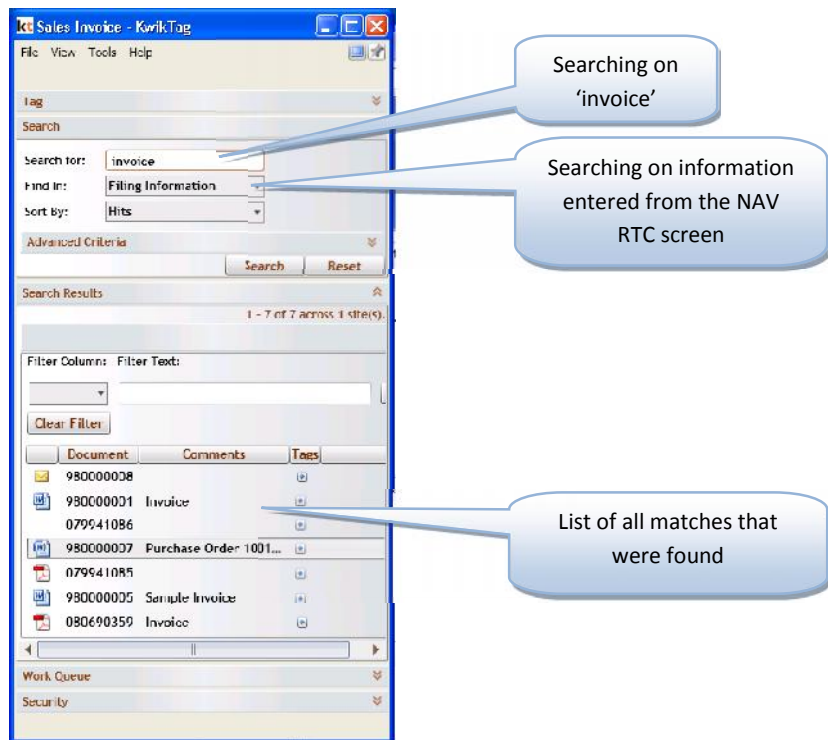


Figure 18

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**' options
2. Email - Select the document and:
 - a) Right click and select '**Email**'
3. Click '**Reset**' to clear the search criteria

THE KWIKTAG NAV WORK QUEUE

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

- 1) From the Microsoft NAV embedded client, click to expand the "**Work Queue**" view (Figure 19)

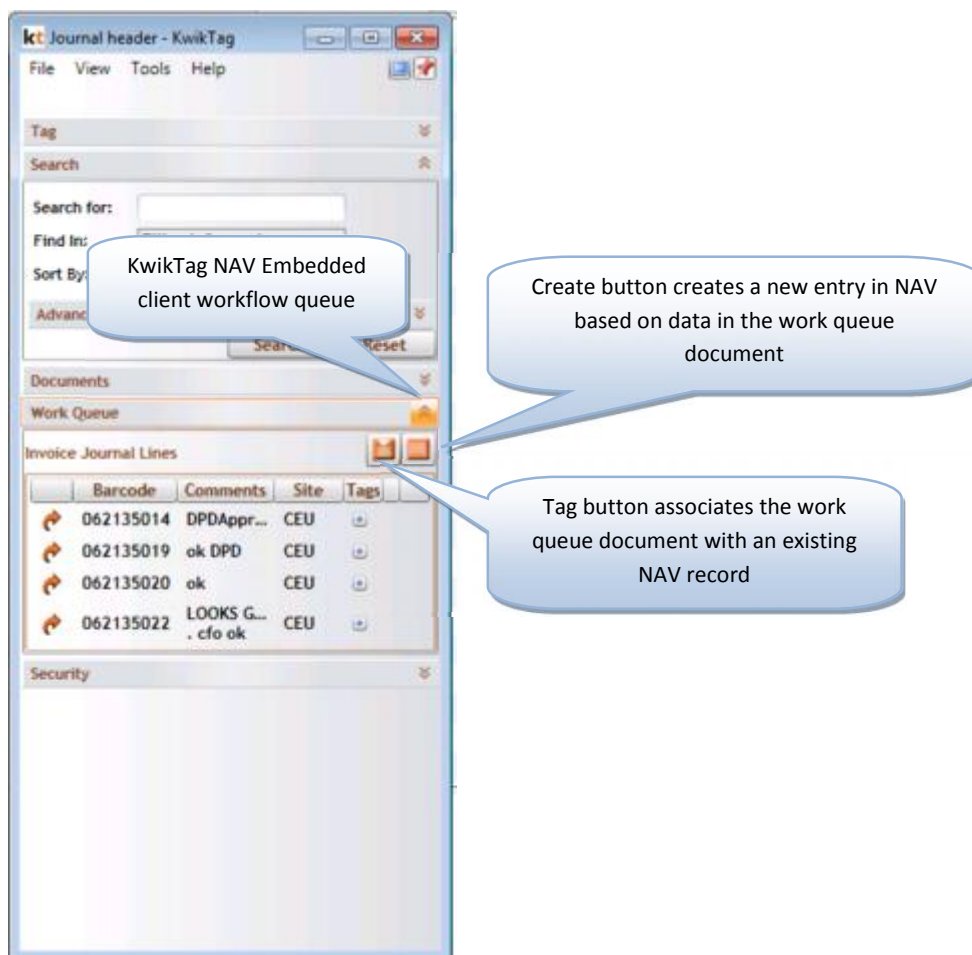


Figure 19

- 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. 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 21).
- 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 19).

CREATE A NEW NAV ENTRY FROM THE WORK QUEUE

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

From the Microsoft NAV embedded client, click to expand the “**Work Queue**” view (Figure 20)

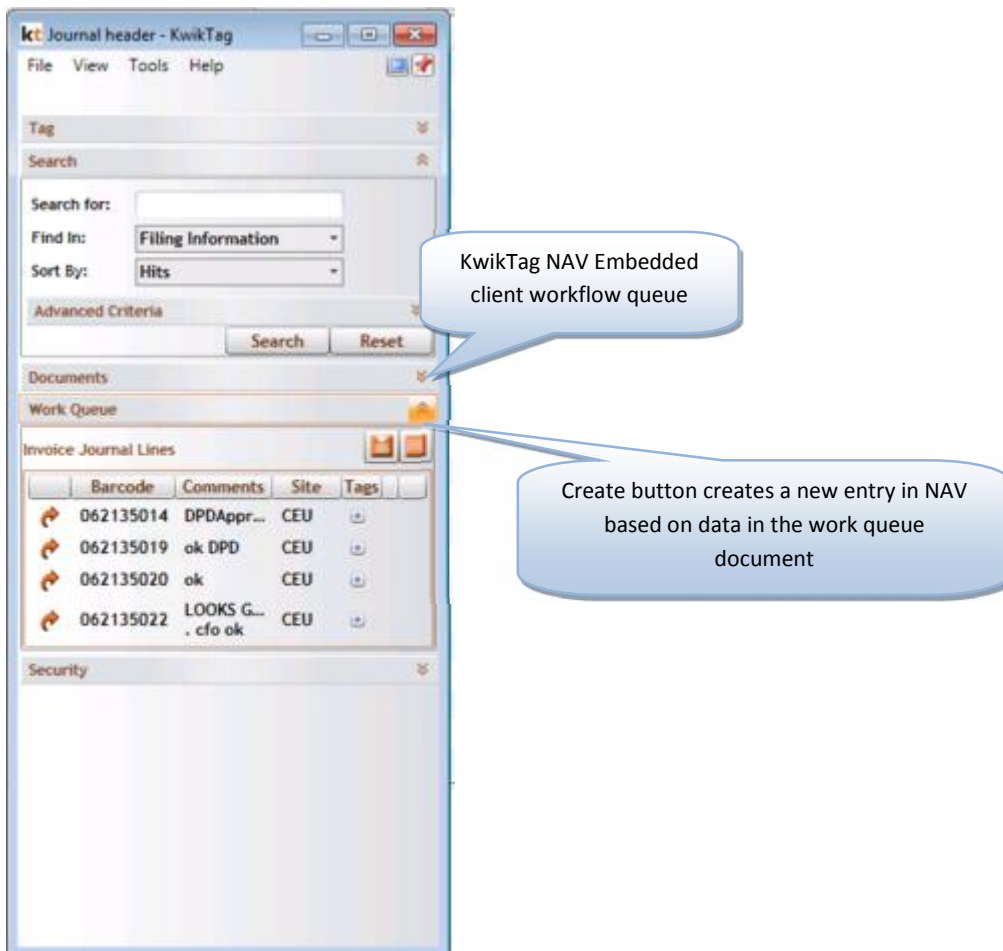


Figure 20

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 21). 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 21).

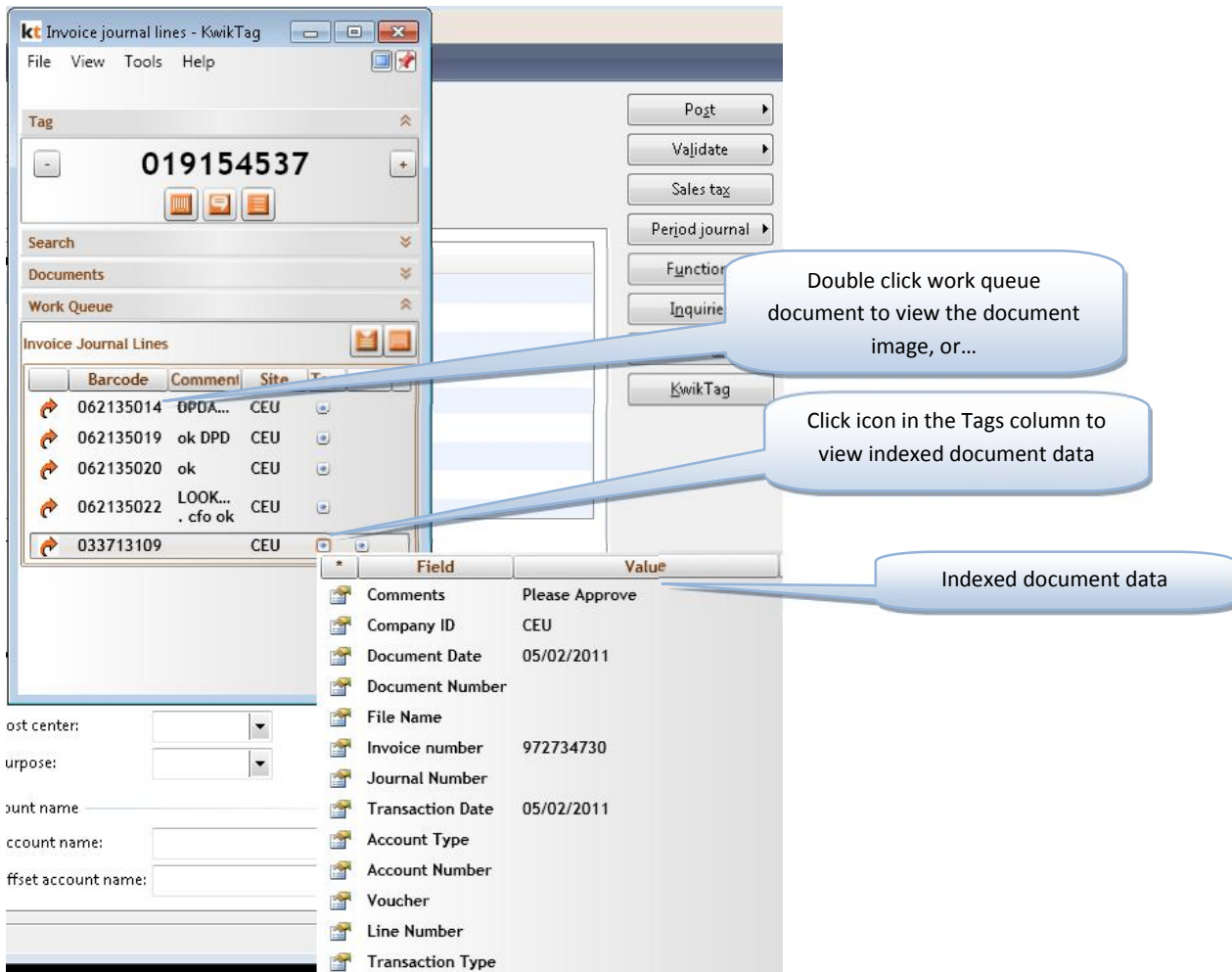


Figure 21

To create a new entry in NAV, simply click the **Create** button located in the upper left hand side of the work queue window (Figure 20). It may take a few seconds for KwikTag to complete the create process.

KwikTag will create an entry in NAV 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.

This concludes the KwikTag NAV Embedded Client Users Guide.

If you have any questions regarding the use of the KwikTag for MS Dynamics NAV 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