kwiktag®
by Imagetag

web client user guide

T3 Version 5.x

INTRODUCTION

KwikTag transactional content management software transforms your business paper into digital records and manages them along with other digital documents that support your day-to-day business transactions.

This User Guide is designed to provide an overview of the KwikTag Web Client capabilities and to enable you to start using KwikTag quickly.

Before getting started this is what you will require:

- Access to a Web browser
- A KwikTag Logon ID and Password (get this information from your company's KwikTag Administrator)
- A KwikTag Label Dispenser and a roll of KwikTag Labels

> This guide will show you how to get started using the KwikTag Web Client.
> Depending on your user license all of these features may not be available to you.

CONTENTS

LOGGING INTO YOUR KWIKTAG CLIENT

1. Open a Web Browser
2. **Enter** the URL for the KwikTag Server (http://<<Your KwikTag Server IP Address>>)
3. **Enter** your KwikTag User ID and password (Figure 1)
4. **Click** on the '>' symbol or **Press** the *Enter* key.

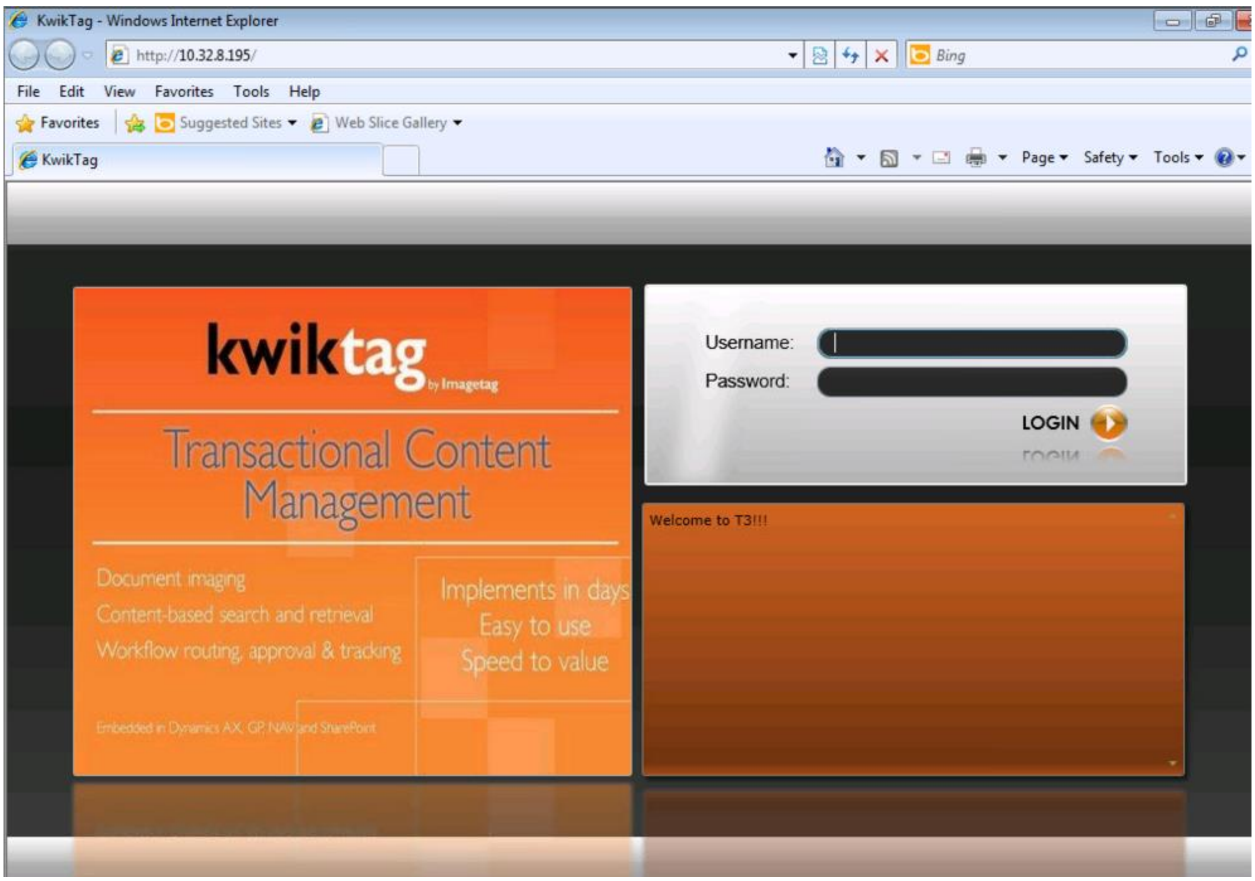

Figure 1 : KwikTag Login Page

KWIKTAG TABS AND YOUR LANDING PAGE

After logging in to KwikTag, your screen will display the default tab that has been configured for your user ID. This is typically the 'Documents' Tab, or the 'Work Queue' Tab.

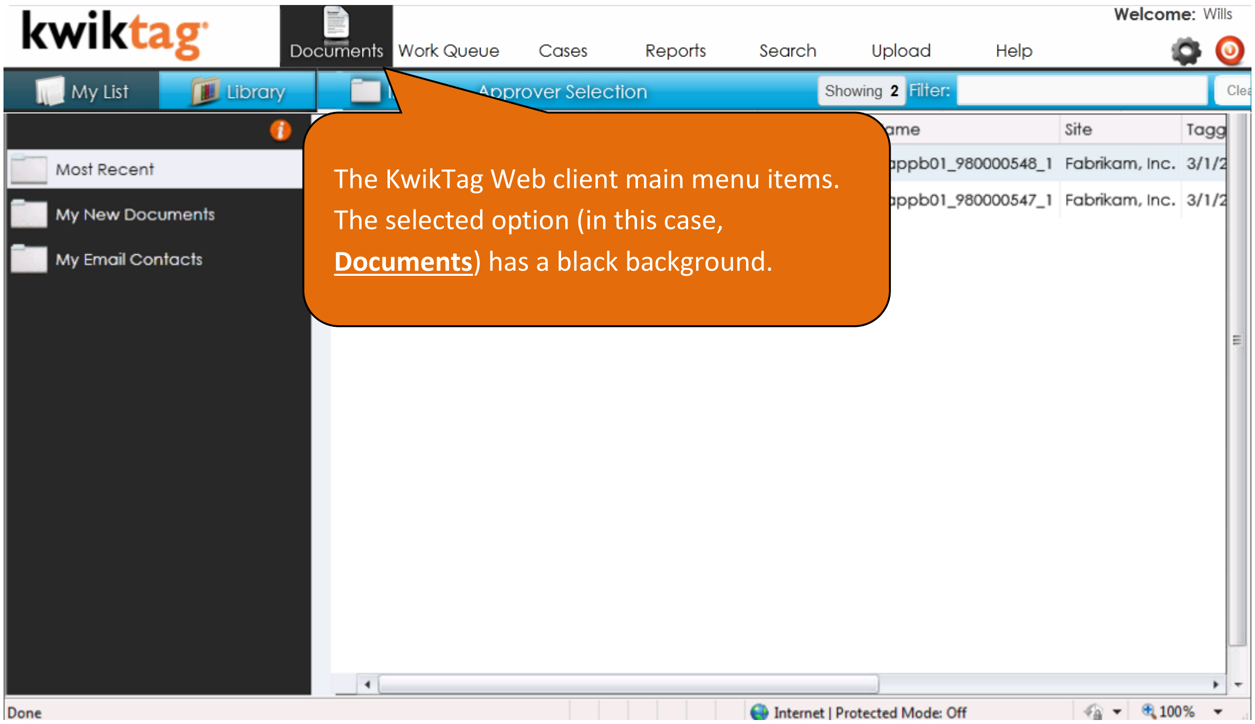

Figure 2a : Landing Page – Documents

The Documents Tab: The Documents Tab displays documents stored in the KwikTag system and provides access to functions that allow you to add, edit, move, search, export or email documents associated with your KwikTag system. For users whose primary responsibility is managing documents within the system, this will be their primary destination.

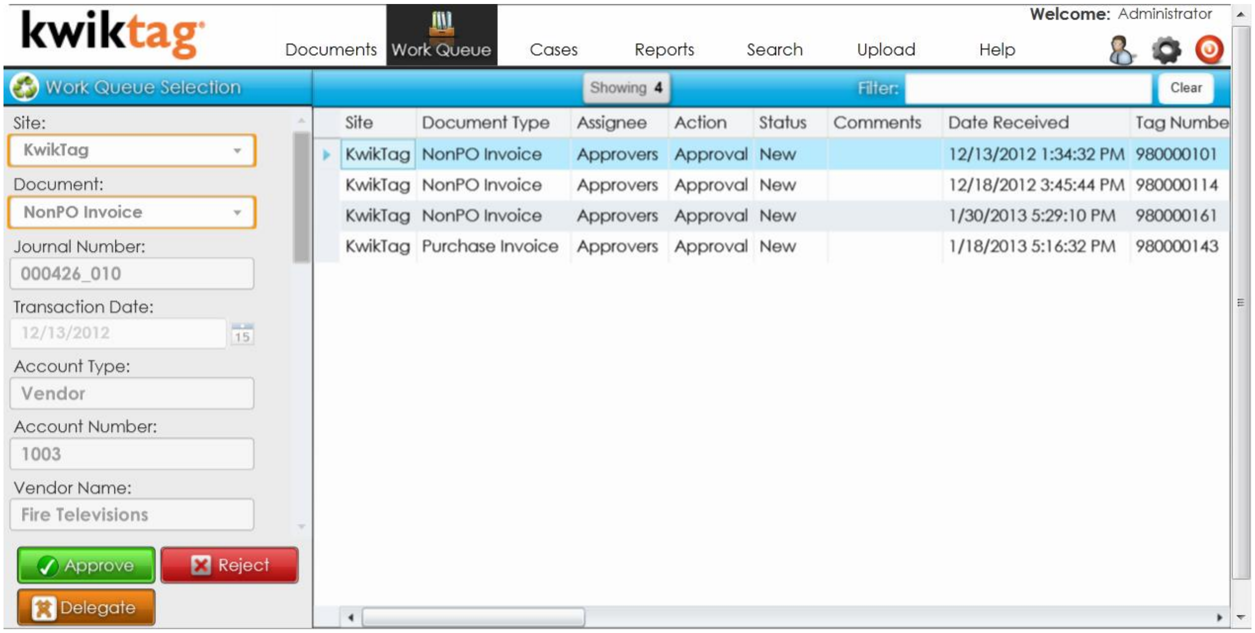

Figure 2b: The Work Queue Tab

The Work Queue Tab: is the primary destination for reviewers or approvers of documents that have been routed using KwikTag workflow to the appropriate stakeholders in a business process. This tab is only relevant for those companies that have chosen to configure workflow processes for their documents. From this Tab, users can view documents and data, approve, reject or delegate documents, view related documents or detailed document data.

The Cases Tab: is configured or "personalized" by ImageTag's Professional Services team (or by your KwikTag administrator) to the specific document types, document workflow processes and document associations that have been configured for your organization. Cases can include a variety of documents, aggregated into a single view, along with related workflow status and case timelines.

The Reports Tab: is configured or "personalized" by ImageTag's Professional Services team (or by your KwikTag administrator) to the specific document types and document workflow processes that have been configured for your organization. Reports can include a variety of data associated with documents that have been routed by KwikTag for review and approval.

The Search Tab: provides the ability to conduct a global search across KwikTag sites and/or KwikTag drawers. Users have the option to tailor their search based on a number of advanced search criteria.

The Upload Tab: provides the ability to drag and drop electronic documents (such as Word or PDF documents) or browse out to a file from a user's desktop or shared network folder into the KwikTag system. Microsoft Outlook files can be added using this function by first dragging the email to the user's desktop, then navigating to, or dragging the file over, the Upload inbox icon.

The Help Tab: provides access to KwikTag release notes, Customer Support contact details and the ability to contact KwikTag support with questions or product feedback.

MENU FEATURES AND FUNCTIONS: DOCUMENTS LANDING PAGE

KwikTag provides easy access to document management functions in three ways: from a right-click menu, a floating menu, or via keyboard shortcuts. This section of the Quick Reference provides a summary of those features and explains how they can be accessed.

"My Lists" and Library Tabs

In the upper left-hand corner of the KwikTag Documents Tab, two Icons are displayed that allow users to alternate between views of select documents that they have selected for quick reference, and the library of KwikTag documents that have been organized by Site and Folder for all users to access. To access either item, simply click on the associated icon.

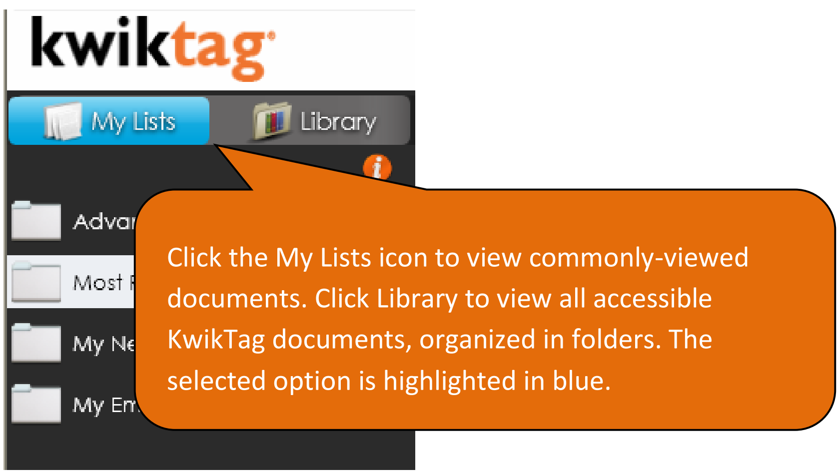

Figure 3: My Lists and Library Tabs

My Lists

My Lists provides a view of a subset of documents stored in the KwikTag document library. These lists are created by each user by selecting the Save View function that is accessed from the KwikTag library or searches (described below). The My Lists view has its own unique menu of functions, which are a subset of the menu functions available from the KwikTag Library. These menu items are covered below on the Documents Tab menu section of this guide.

The KwikTag Library: All Doc Types and My Favorites

The KwikTag Library is organized into a series of folders that contain all your organization's documents. Depending on how your organization is structured, these folders may be organized into separate sites.

To access all available sites and folders, click the “My Library,” then click the “All Doc Types” radio button. You may designate frequently-accessed folders as Favorites my right-clicking your mouse over the folder, then clicking “Add to Favorites.”

Figure 4: All Doc Types and Favorites

MY LISTS MENU FUNCTIONS

Figure 5 below displays the options available to KwikTag users by clicking the right button on their mouse from anywhere within the main My Lists window display. A subset of these menu options also may be accessed by selecting the ‘Show Menu Always’ option displayed at the bottom of the right-click menu (Figure 6). Alternately, KwikTag provides keyboard shortcuts for these functions (Figure 7).

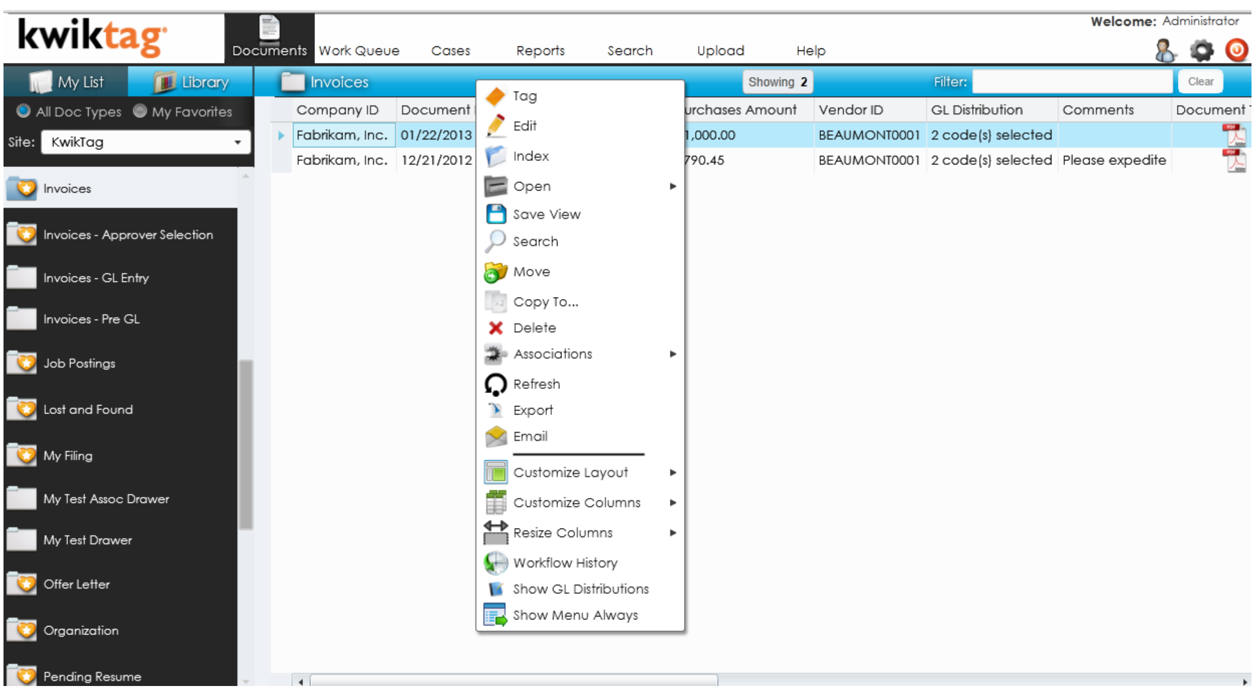

Figure 5: KwikTag Document Management Right-Click Menu Options

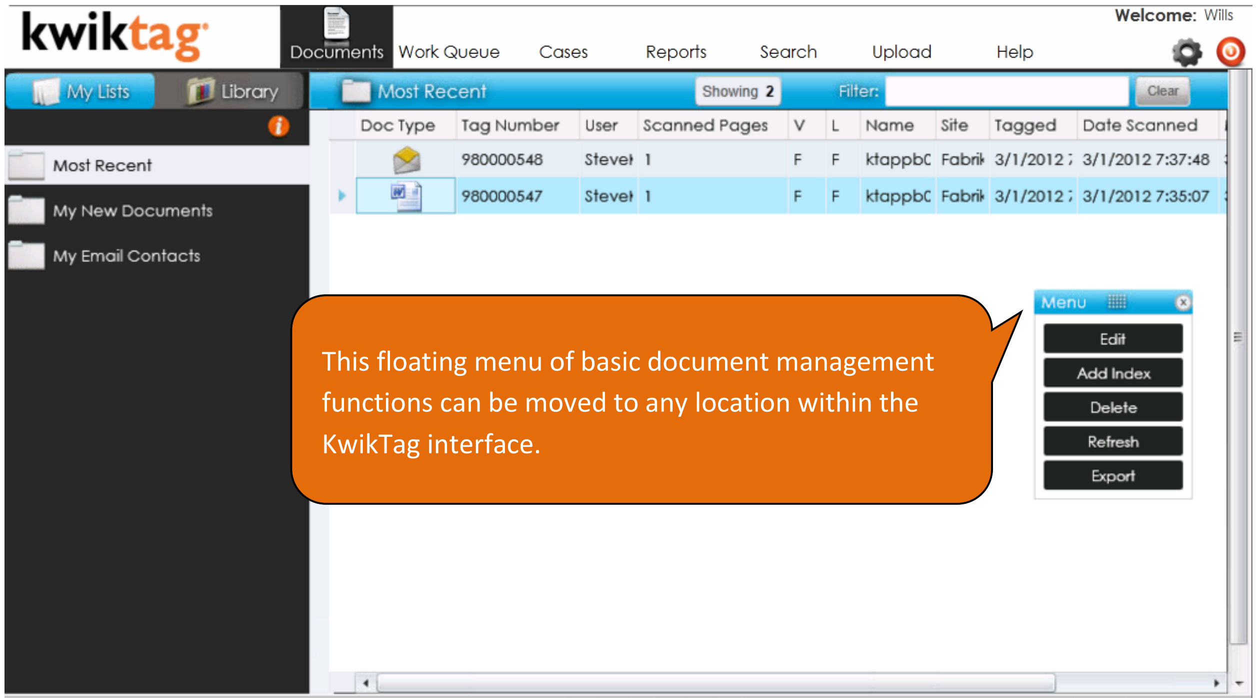

Figure 6: Show Menu Always (KwikTag floating menu) (need new screen shot for the new menu)

Menu options available from the My Lists tab include:

Edit *(Ctrl EE)* allows users to edit data associated with a KwikTag document, or a reservation for a document.

Add Index *(Ctrl AI)* allows users to create multiple document records for the same document image. As a result, a single KwikTag barcode links one document image to multiple document records. Clicking this option results in the display of an Index window with data fields to be completed for that record. For users or earlier KwikTag versions, this function replaces the Multiple Document Mode (MDM) feature.

Open *(Ctrl OH to open here; Ctrl ON to open in line)* presents users with the option of viewing documents within the same window, or in a separate window (ideal for multiple monitors). The Open Here option allows users to scroll through records using their mouse or keyboard while viewing the associated document image automatically. Using the Open in New Window option (or double clicking the document) launches a new window and displays the document. Note that the separate window display does not refresh to show a new image as the user scrolls from one record to the next.

KwikTag provides an instant preview of PDF documents. For other document types (such as Microsoft Office documents), KwikTag provides the option to launch the native application for the document (example: Microsoft Word) by choosing Open. Alternately, the user can select “Save As” to save a local copy of the document before opening it in the appropriate application.

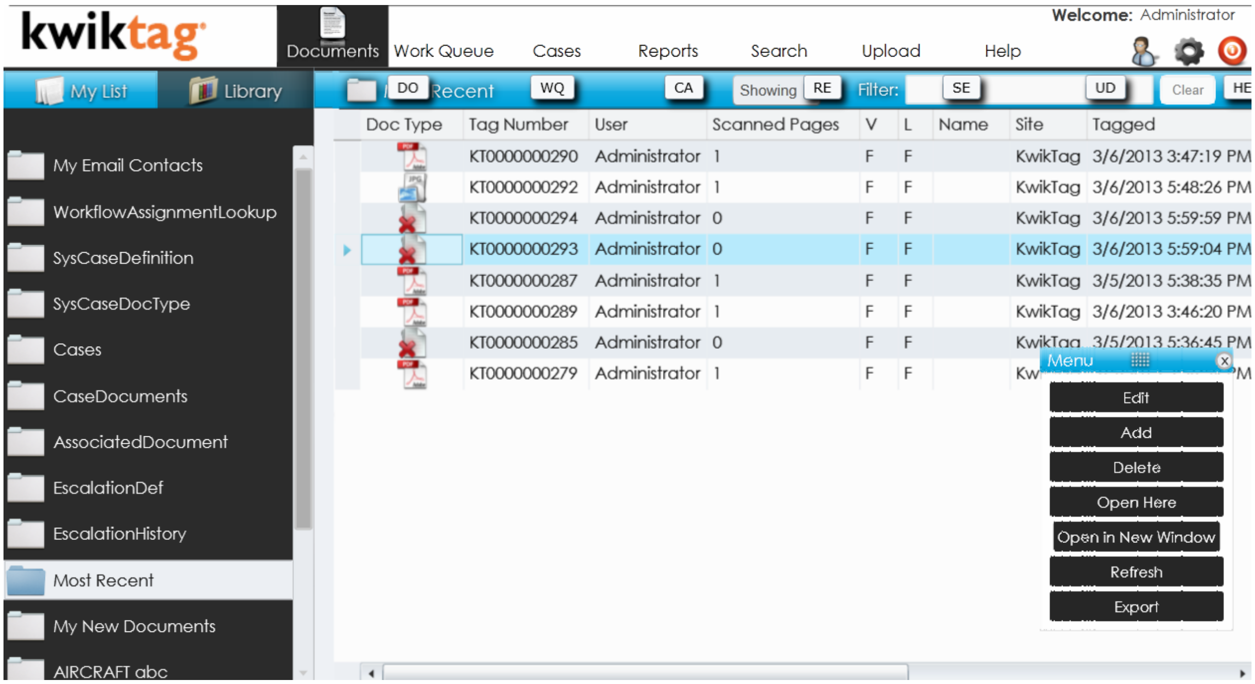

Figure 7: KwikTag Documents Tab keyboard shortcuts. Selecting the 'Ctrl' key highlights keyboard shortcuts for common KwikTag menu items.

Delete *(Ctrl DD)* allows users to delete documents and records from the KwikTag system. Users are prompted to confirm before any records are deleted.

Refresh *(Ctrl RR)* updates the view of the KwikTag Web client, so that any changes (deletions, additions, etc) are visible. Note that using Ctrl F5 to refresh the Web client will refresh the browser window, requiring you to log in to the KwikTag Web client again.

Export *(Ctrl EX)* allows users to export document data from a KwikTag list view to a CSV file that can be saved locally. This function exports the document data only—document images are not exported.

Email *(no keyboard shortcut)* allows users to email documents as attachments, as links to the record in KwikTag, or both.

Customize Layout *(no keyboard shortcut)* allows users to minimize or maximize their view of KwikTag document data. Maximizing the view removes the display of My List items to accommodate a wider field of index data.

Customize Columns *(no keyboard shortcut)* allows users to select/deselect the columns of data associated with their documents that they wish to display. After checking/unchecking these options simply click anywhere within the document data view to return to the updated display.

Resize Columns *(no keyboard shortcut)* allows users to select format column widths by the width of column headers, column data, or a 'best fit' between the two options.

Workflow History *(no keyboard shortcut)* displays a graphic view of each step that has been completed in a workflow process for documents that have been indexed and routed for approval. This function is only relevant to organizations relying on KwikTag workflow functionality. Documents that have not been routed for approval will display an icon indicating no workflow history.

Show Menu Always *(no keyboard shortcut)* allows users to view a persistent menu of options without having to rely on the right-click option.

KWIKTAG LIBRARY FEATURES

The KwikTag Library presents a menu of options similar to those available from the My Lists view, with five additional functions that support the capture and retrieval of documents to/from the KwikTag system. Like the My Lists view, these menu options can be accessed via right-click, from a floating menu, or via keyboard shortcuts.

The KwikTag Library displays document folders to the left of the screen. Optionally, these folders can be organized by Site. The selected folder is highlighted on the left. Its name also appears at the top of the displayed documents and data. To the right of the folder name, KwikTag presents two options.

A **Filter** window allows users to enter keywords and filter the display of documents in the folder to those whose index data include the keywords. To filter, type in your filter criteria and hit the Enter key on your keyboard. The filter will then be applied to the entire KwikTag document drawer. To clear the filter, click Clear.

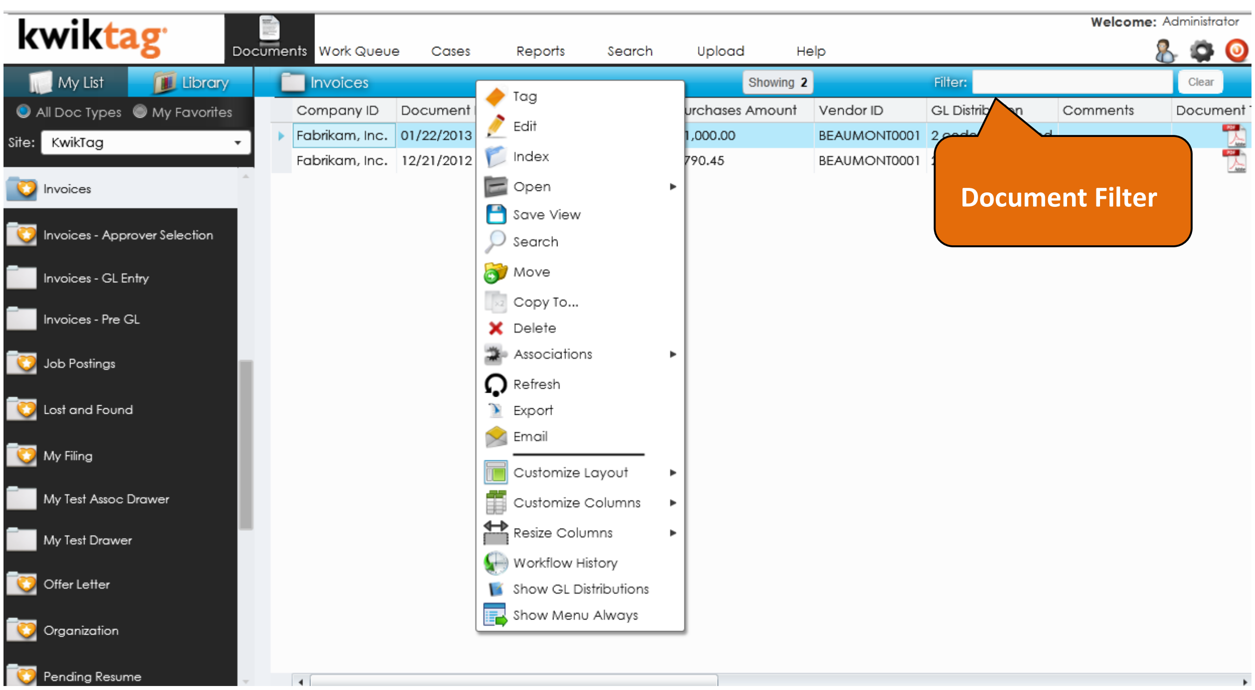

Figure 8: KwikTag Documents Library Right-click Menu Options

KWIKTAG LIBRARY MENU FUNCTIONS

Tag (Ctrl T) allows users to enter index data associated with a paper document to be scanned into the KwikTag system. Required fields for a tagged document are highlighted in orange. When the user clicks submit, KwikTag assigns the barcode displayed in the Tag window to the record. A KwikTag adhesive barcode label with the same barcode number links a paper document to the Tag data so that when the document is scanned into KwikTag the data and documents are associated. If a user attempts to Open a document associated with the Tag record prior to scanning, KwikTag will display a message indicating that there is no document associated with the record.

Edit *(Ctrl EE)* allows users to edit data associated with a KwikTag document, or a reservation for a document.

Add Index *(Ctrl AI)* allows users to create multiple document records for the same document image. As a result, a single KwikTag barcode links one document image to multiple document records. Clicking this option results in the display of an Index window with data fields to be completed for that record. For users or earlier KwikTag versions, this function replaces the Multiple Document Mode (MDM) feature.

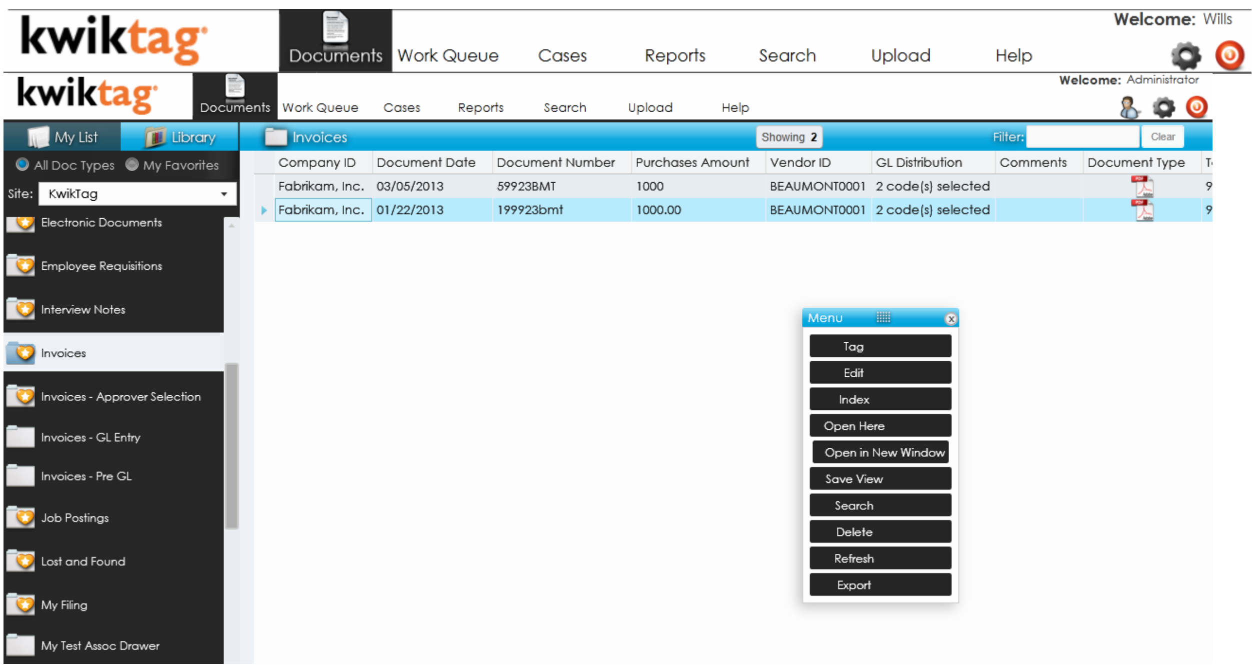

Figure 9: The KwikTag Tag Window (left) allows users to input filing information associated with the highlighted document. On the right, the KwikTag Documents Library Floating Menu Options are displayed.

Open *(Ctrl OH to open in new window or Ctrl ON to open inline)* presents users with the option of viewing documents within the same window, or in a separate window (ideal for multiple monitors). The

Open Here option allows users to scroll through records using their mouse or keyboard while viewing the associated document image automatically. Using the Open in New Window option requires the user to select a record and then open the image in a new window (the separate window display does not refresh to show a new image as the user scrolls from one record to the next). Double-clicking a record also will allow you to open the document in a new window.

KwikTag provides an instant preview of PDF documents. For other document types (such as Microsoft Office documents), KwikTag provides the option to launch the native application for the document (example: Microsoft Word) by choosing Open. Alternately, the user can select "Save As" to save a local copy of the document before opening it in the appropriate application.

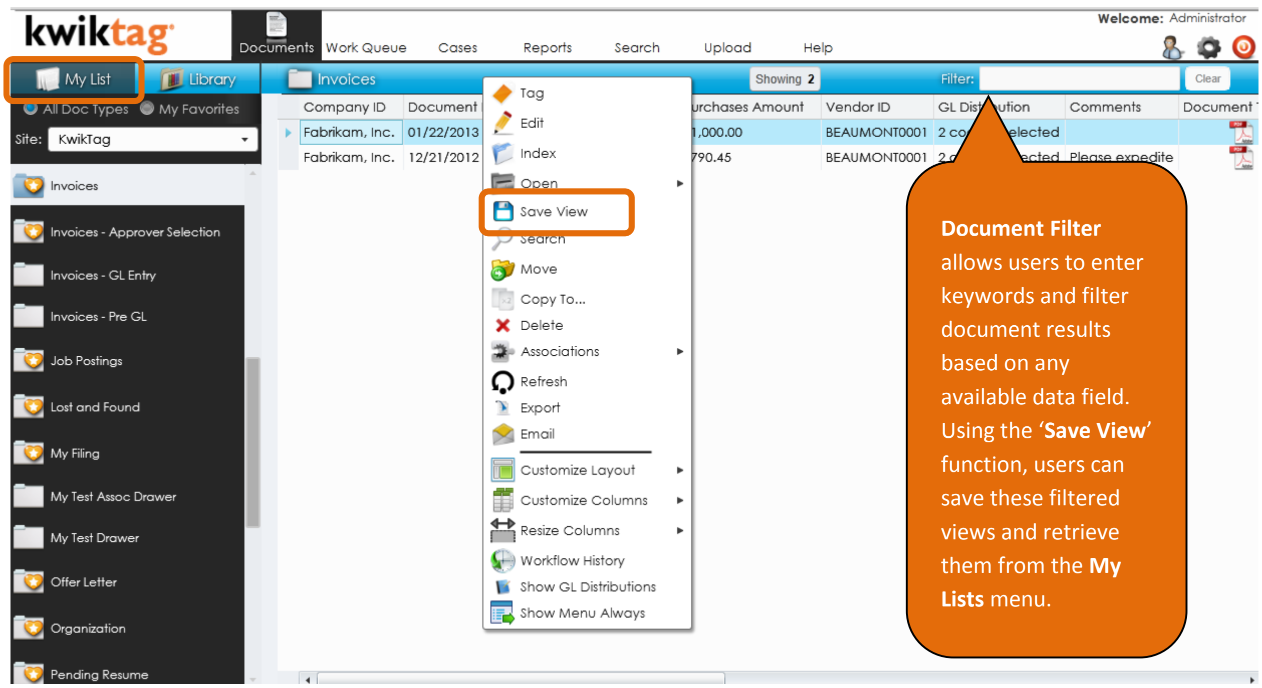

Figure 10: KwikTag Documents Library Filter and Save View functions allow users to save document views to the My Lists menu.

Save View (Ctrl SV)(Figure 10) allows users to save a list of documents that have been filtered based on selected keyword criteria. The view is saved and can be retrieved from the My Lists menu. Prior to saving, the user is prompted to enter a name for the View.

Search (Ctrl F) allows users to search for documents within a folder based on specific Index data. Each index field associated with documents in the folder is displayed within the search tab, so that multiple search criteria can be selected to retrieve a specific document. When search results are returned for a folder, the folder name at the top of the screen will display a message indicating that the results are filtered. Click Clear from the search window to clear the Search. Click the 'X' at the top of the search window to close it.

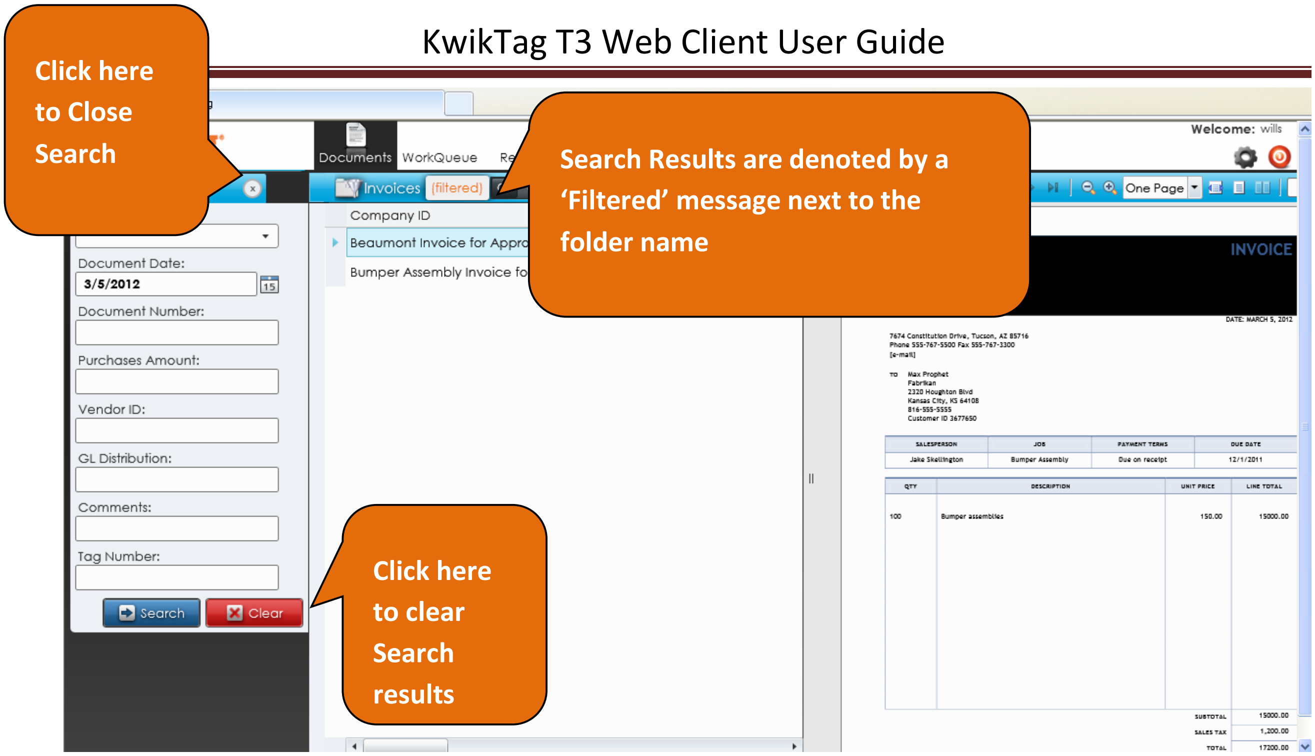

Figure 11: KwikTag Documents Library Search Results (with 'Open Here' document view option). Users can search on any document index field.

Move allows users to move documents and data from one KwikTag folder to another. Note that if the destination folder stores different index data than the source folder, the data will not be moved with the image. To prevent accidentally losing data, KwikTag prompts users prior to completing the transfer.

Copy To allows users to copy documents and data from one KwikTag folder to another. Note that if the destination folder stores different index data than the source folder, the data will not be copied with the image. To prevent accidentally losing data, KwikTag prompts users prior to completing the transfer.

Delete *(Ctrl DD)* allows users to delete documents and records from the KwikTag system. Users are prompted to confirm before any records are deleted.

Associations allow users to view other records that have been configured to have a relationship to the document being viewed. This association may consist of metadata alone, or may include an associated document image as well. An example might include a purchase order associated with a PO invoice, or an invoice associated with a check image. Associated records are displayed in a floating that displays relevant data. Right clicking on an associated record provides the option to view an associated document.

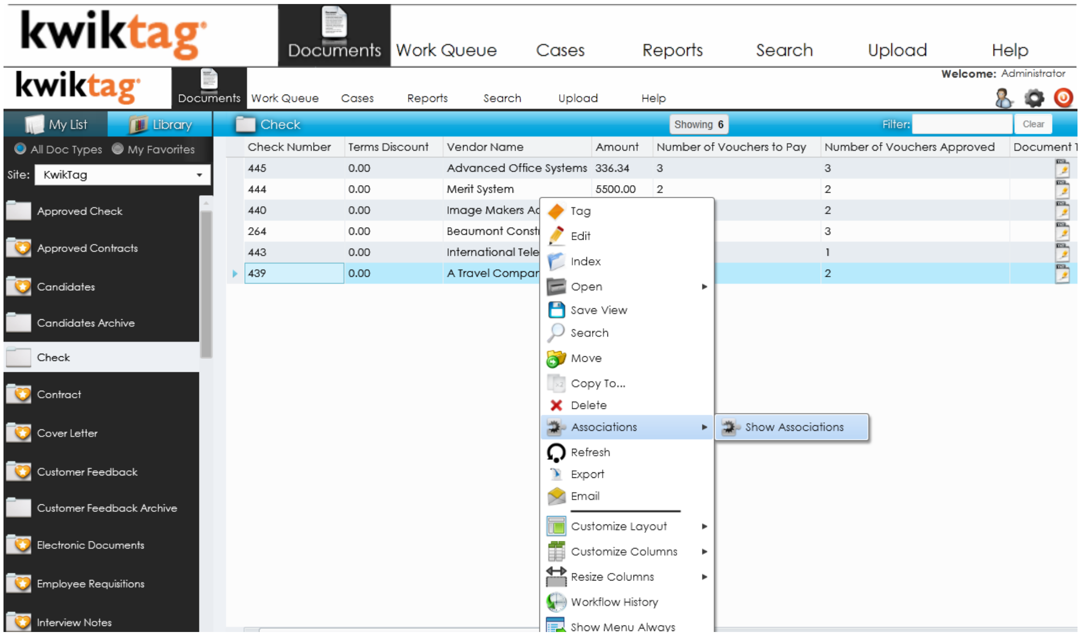

Figure 12: Show Associations allows users to view other documents associated with a transaction.

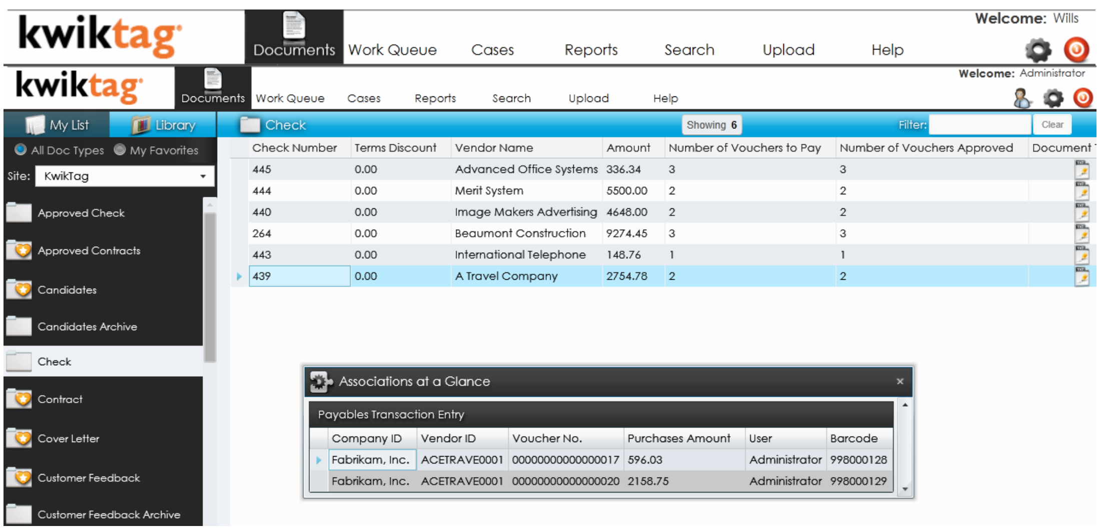

Figure 13: Associations are displayed in a floating window that displays document details. Right click on a row and click "View Doc" to see the image associated with it.

Refresh *(Ctrl RR)* updates the view of the KwikTag Web client, so that any changes (deletions, additions, etc.) are visible.

Note that using Ctrl F5 DOES NOT refresh the KwikTag window, but rather, refreshes the entire browser window, requiring you to log in to the KwikTag Web client again.

Export *(Ctrl EX)* allows users to export document data from a KwikTag list view to a CSV file that can be saved locally. This function exports the document data only—document images are not exported.

Email *(no keyboard shortcut)* allows users to email documents as attachments, as links to the record in KwikTag, or both.

Customize Layout *(no keyboard shortcut)* allows users to minimize or maximize their view of KwikTag document data. Maximizing the view removes the display of My List items to accommodate a wider field of index data.

Customize Columns *(no keyboard shortcut)* allows users to select/deselect the columns of data associated with their documents that they wish to display. After checking/unchecking these options, simply click anywhere within the document data view to return to the updated display.

Resize Columns *(no keyboard shortcut)* allows users to select format column widths by the width of column headers, column data, or a 'best fit' between the two options.

Workflow History *(no keyboard shortcut)* displays a graphic view of each step that has been completed in a workflow process for documents that have been indexed and routed for approval. This function is only relevant to organizations relying on KwikTag workflow functionality. Documents that have not been routed for approval will display an icon indicating no workflow history.

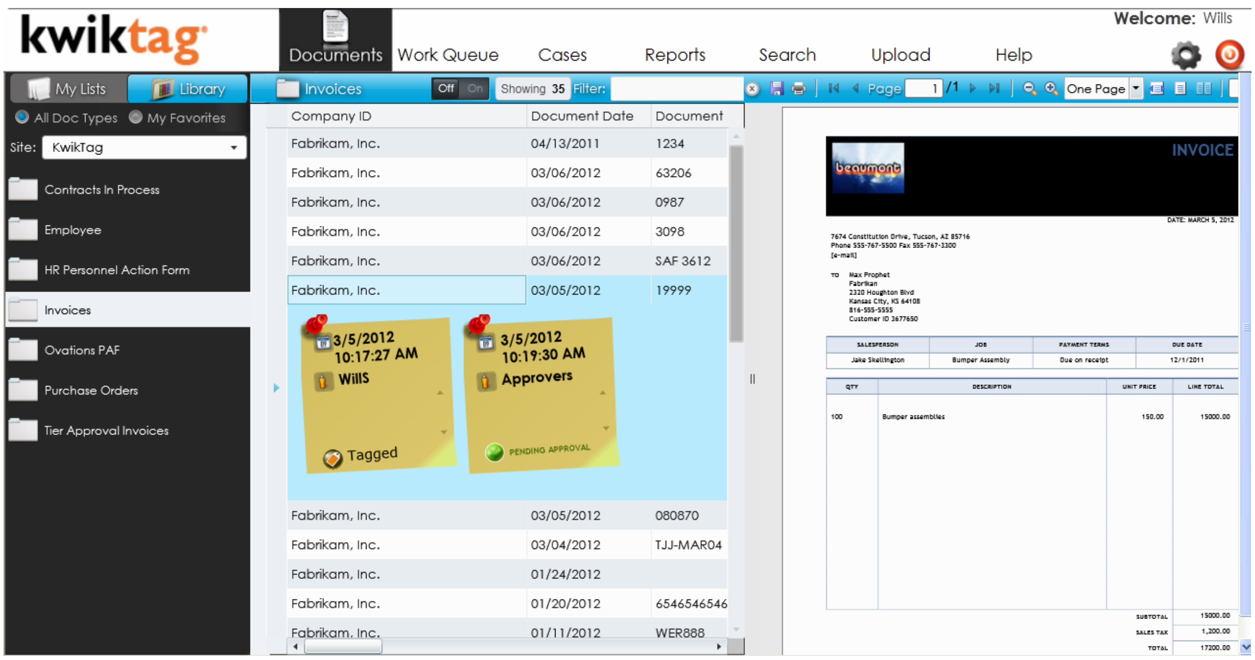

Figure14: KwikTag Documents Library with Workflow History and 'View Here' document preview

Show GL Distributions *(no keyboard shortcut)* displays a floating window that shows details for G/L distributions associated with documents such as invoices. This display is used to supplement the G/L distributions index field, which simply indicates the number of G/L codes associated with a record. The GL distribution window displays each account number, an associated description, type and the debit or credit amount.

Show Menu Always *(no keyboard shortcut)* allows users to view a persistent menu of options without having to rely on the right-click option.

MENU FEATURES AND FUNCTIONS: WORK QUEUE

The KwikTag Work Queue page is designed to assign documents to KwikTag users in support of a variety of tasks, including adding index data to documents, or reviewing/approving documents as part of a defined business process. Workflows can be pre-configured by KwikTag professional services team as part of your deployment, based on your organization's unique business rules.

KwikTag administrators have access to KwikTag workflow configuration. With appropriate training, they can modify workflow processes or create new workflows according to your business needs.

KwikTag Work Queue Menu Functions

The KwikTag Work Queue displays relevant document for a selected record in the center of the screen and a panel on the left for indexers to add data, or approvers to approve, delegate or reject documents. Users can choose to view documents associated with the selected record in the same window, or in a separate window in the same manner employed on the Documents tab.

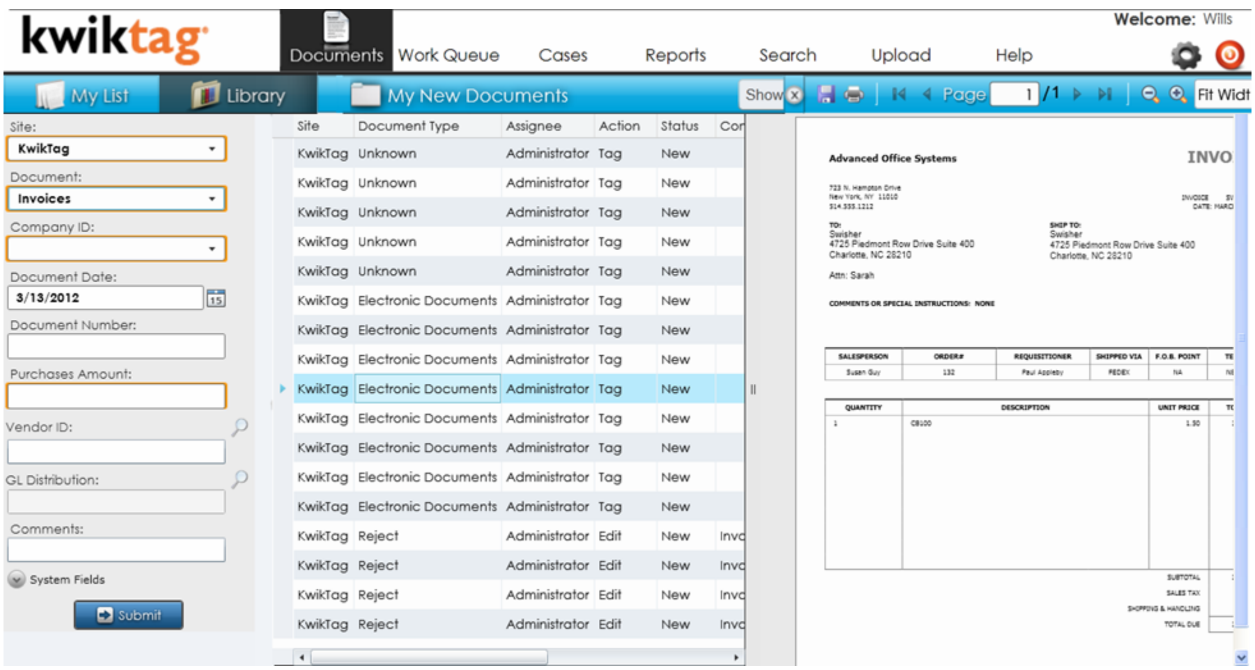

Figure 16: KwikTag Work Queue for Indexers (Index data fields and Submit Options)

Additional menu options are accessed in three ways: by right-clicking in the main area of the Work Queue, by selecting items from the floating Menu, or by using keyboard shortcuts.

The **Filter** function at the top of the Work Queue screen functions like the Filter from the Documents Tab—however, retrieving the Filtered View for Work Queue items functions differently. To filter records in your Work Queue, enter a keyword in the Filter window and press return on your keyboard. The Filter window will retain the keywords, highlighted in yellow. Only records that contain the keyword in the filter window will be displayed. . To filter, type on your filter criteria and hit the Enter key on your keyboard. The filter will then be applied to the entire KwikTag document drawer.

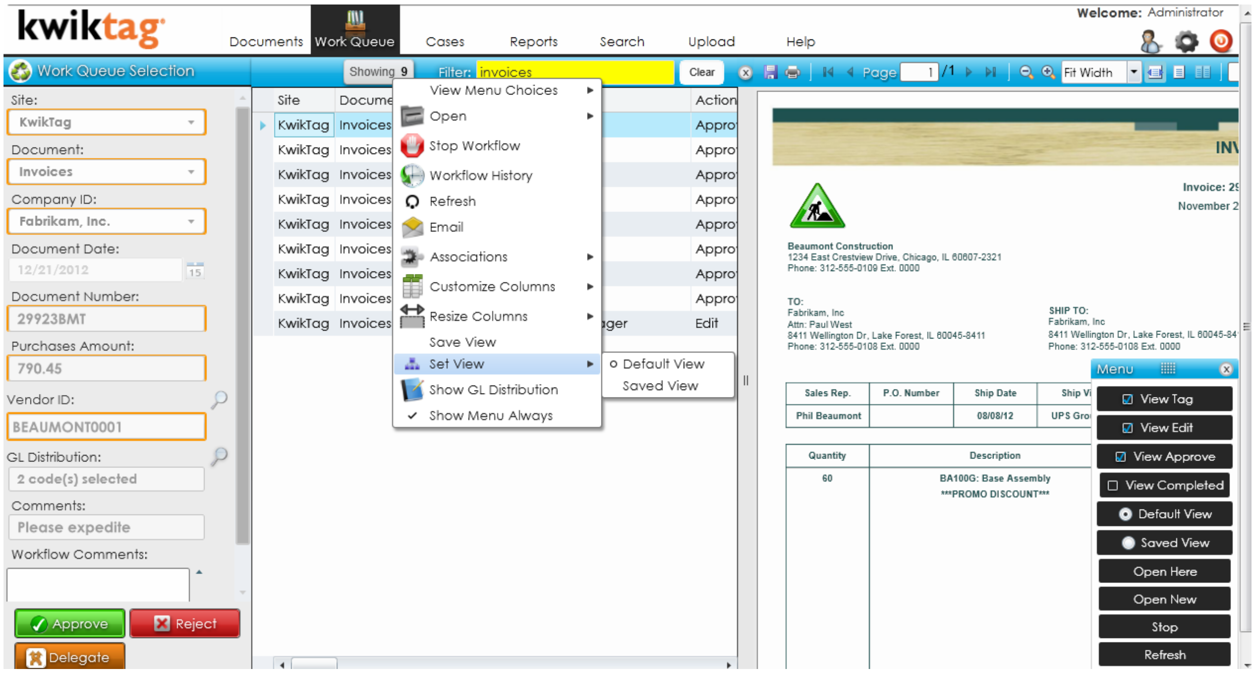

Figure 17: Approver Work Queue: Filter and Right-click menu with Set View selected. Use Save View to save a filtered view. Select Set View>Saved View to retrieve the saved, filtered view.

To save the filtered results as a View, select the **Save View** function from the Right-click or Floating Work Queue menu. To switch between a saved, filtered view and the complete work queue, select the **Set View** function from the right-click or floating menu, then choose between Default View and Saved View. Default view always shows the complete work queue.

View Menu Choices allows users to choose to view all items in their work queue, or to select items to be viewed based on the required action. Users can select items to tag, items to edit, items to approve or completed items. These same options are available as check boxes from the floating KwikTag menu (as seen in Figure 14).

Open (Ctrl ON and Ctrl OH) options function like the open options from the Documents menu. Users can choose to Open Here and view documents in a PDF viewer window in line with the document data. Alternately, they can choose to open documents in a separate window.

Stop Workflow (Ctrl ST) Stop workflow is used to terminate any active workflow at any point during the excitation process. The workflow item is marked as stopped for audit purposes. User must be a member of the workflow admin group to have access to stop a workflow.

Refresh (Ctrl RR) updates the view of the KwikTag Web client, so that any changes (deletions, additions, etc.) are visible.

Customize Columns *(no keyboard shortcut)* allows users to select/deselect the columns of data associated with their documents that they wish to display. After checking/unchecking these options simply click anywhere within the document data view to return to the updated display.

Resize Columns *(no keyboard shortcut)* allows users to select format column widths by the width of column headers, column data, or a 'best fit' between the two options.

As described above, the **Save View** function allows users to save a Filtered view of the work queue.

Set View allows users to choose between the Default View (all documents) and a Saved View (filtered results).

Show GL Distributions *(no keyboard shortcut)* functions as described in the Documents Tab. This display is used to supplement the G/L distributions index field, which simply indicates the number of G/L codes associated with a record.

Workflow History *(no keyboard shortcut)* displays a graphic view of each step that has been completed in a workflow process for documents that have been indexed and routed for approval. This function is only relevant to organizations relying on KwikTag workflow functionality. Documents that have not been routed for approval will display an icon indicating no workflow history.

Show Menu Always *(no keyboard shortcut)* allows users to view a persistent menu of options without having to rely on the right-click option.

MENU FEATURES AND FUNCTIONS: CASES

The KwikTag Cases page is designed to support users who wish to rely on KwikTag's ability to monitor multiple documents through review and approval processes as part of a single, defined business process. Cases can be pre-configured by KwikTag's professional services team as part of your deployment, based on your organization's unique business rules. Cases are usually defined around a multi-document process like check approval, where prior purchase order or invoice approvals may have occurred. Or, around a process like human resources recruiting, where job requisitions, job postings and resumes and related documents can be aggregated and tracked for each applicant.

The following screen images highlight the main features and functions of KwikTag cases. As with other KwikTag features functionality is accessed via right-click menus.

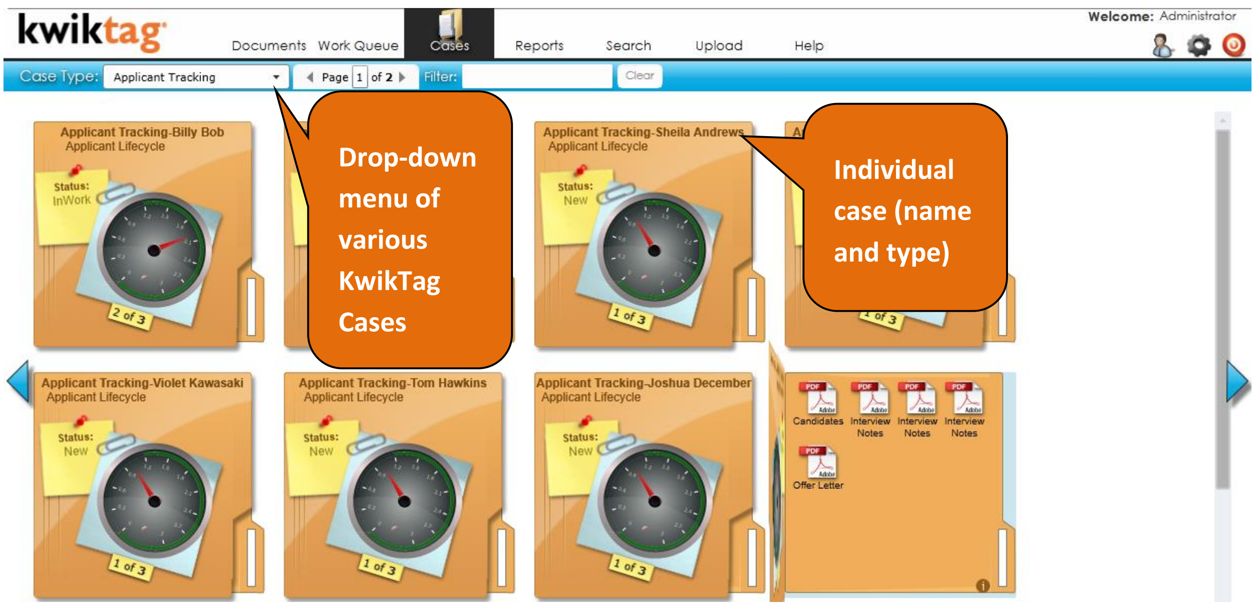

Figure 18: KwikTag Case view for Human Resource Applicant Tracking. Each case automatically aggregates all documents related to the job applicant.

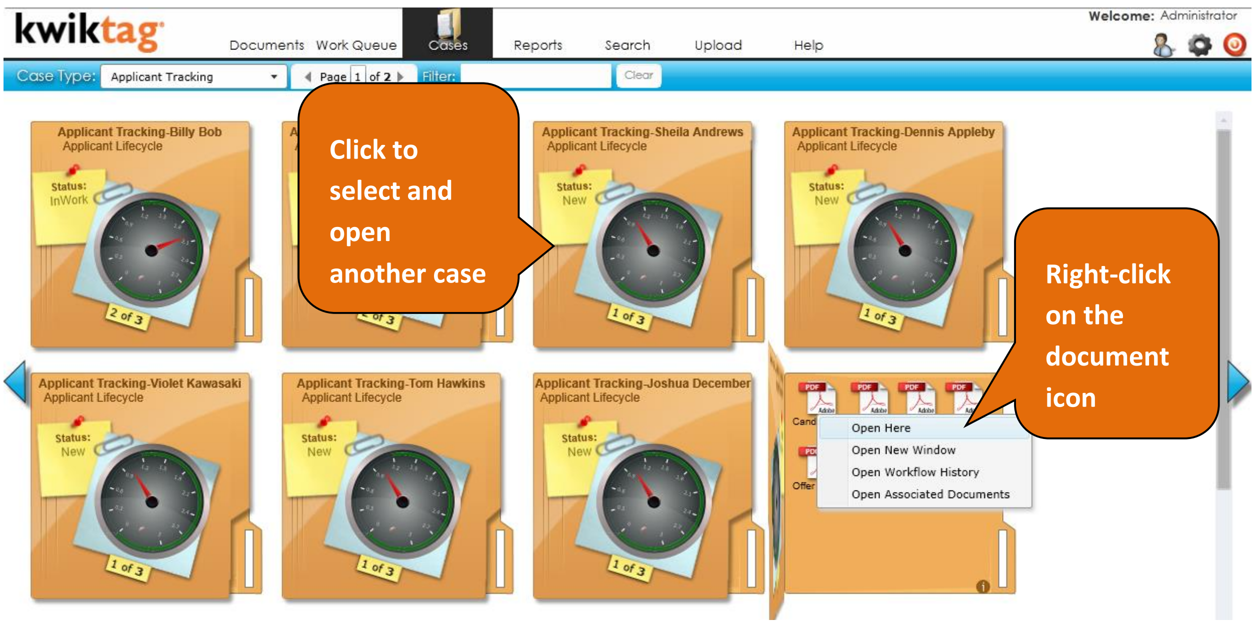

Figure 18a. Right Click on a document icon to view a menu of case document options. Select Open Here or Open in a New Window to view case documents. Select Open Workflow History to view that specific document's workflow approval status. Select Open Associated documents to view documents associated with that specific case document.

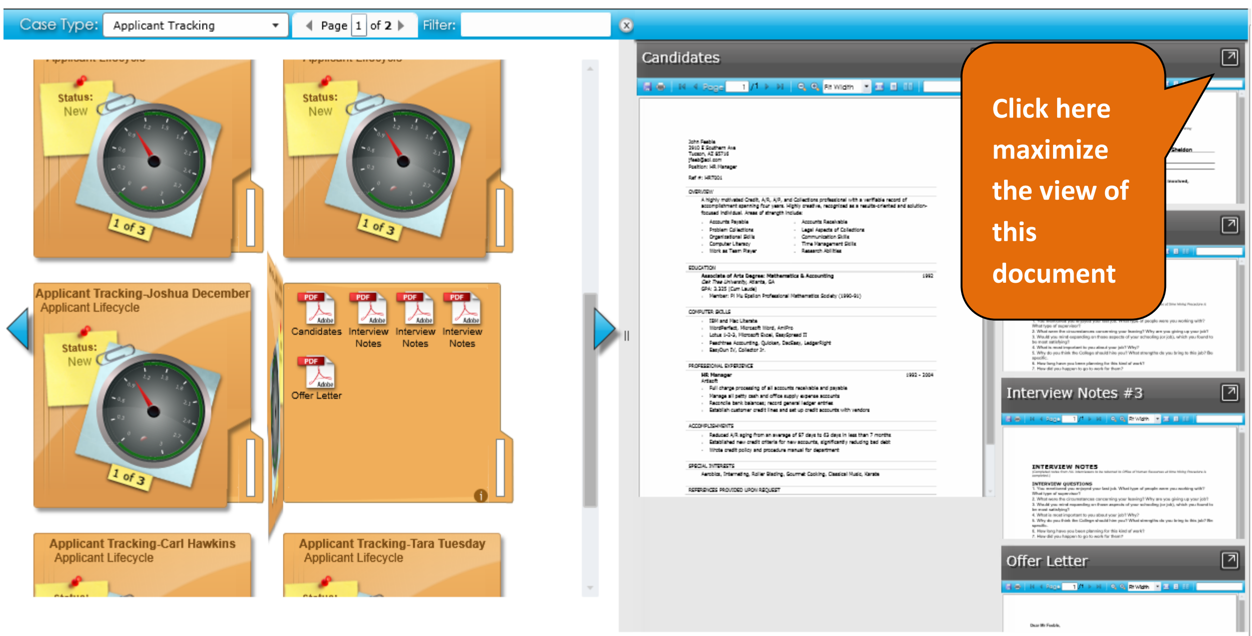

Figure 18b. Preview of all Case documents.

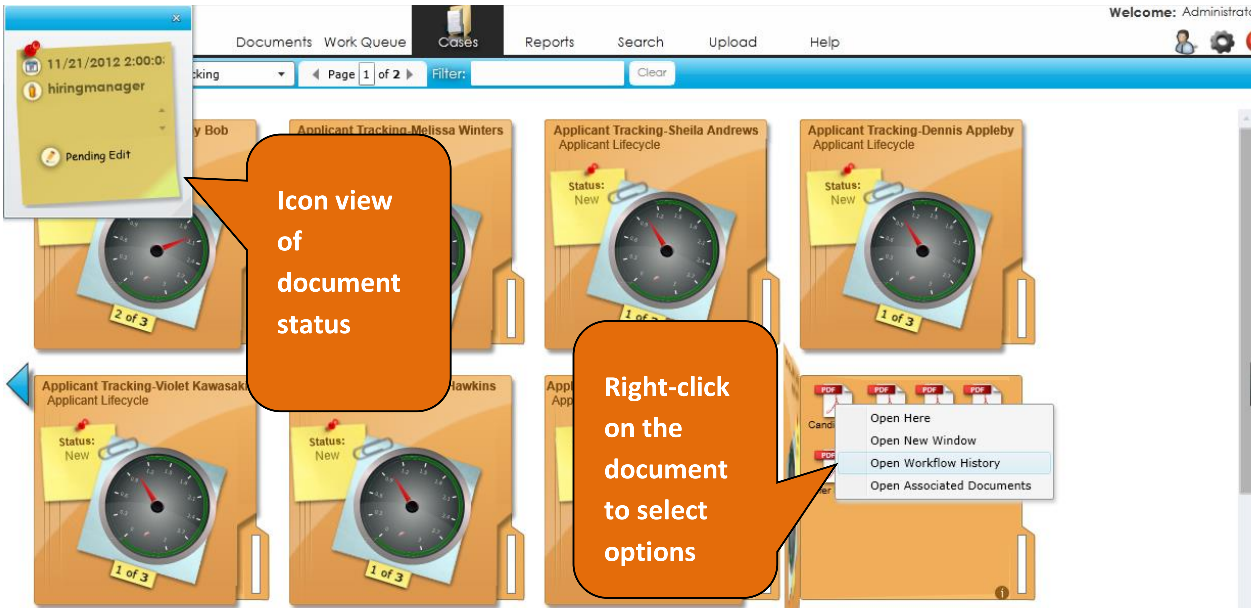

Figure 18c. KwikTag Case Workflow. Right click on the document, then select "Open Workflow History" to see any steps in the approval process.

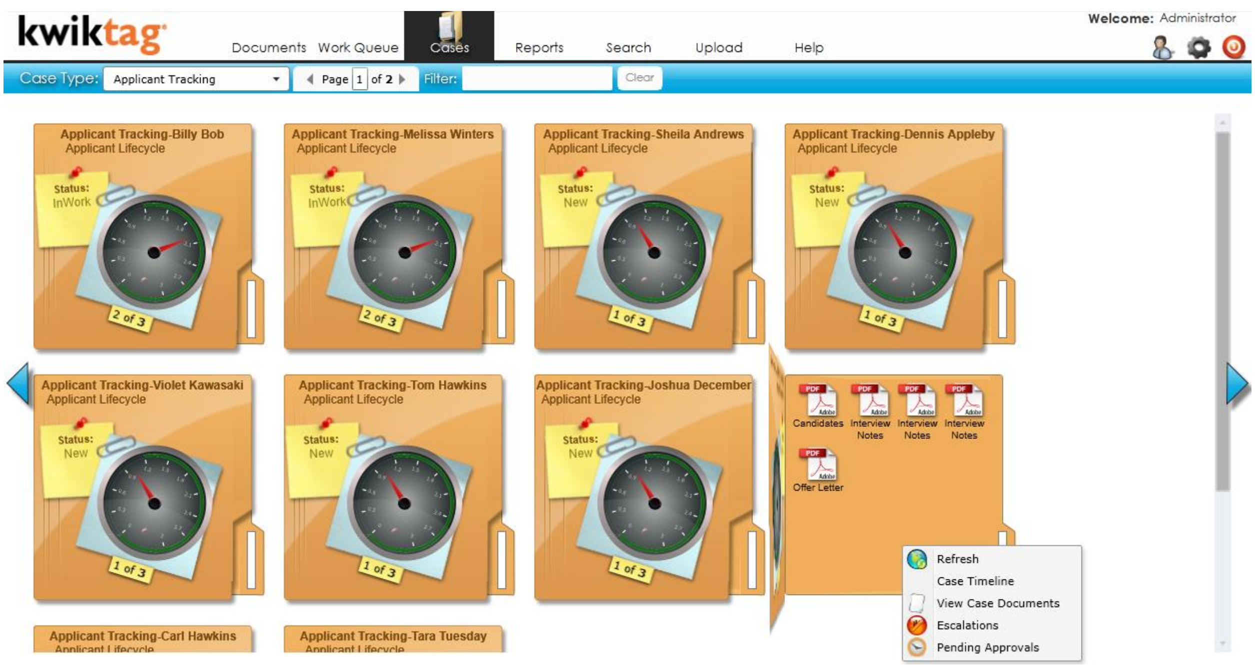

Figure 18d. Case-related status: right click on the case (not on the document). Case timeline presents a status of all related documents in the case. Pending approvals shows any outstanding steps in the approval process for case documents.

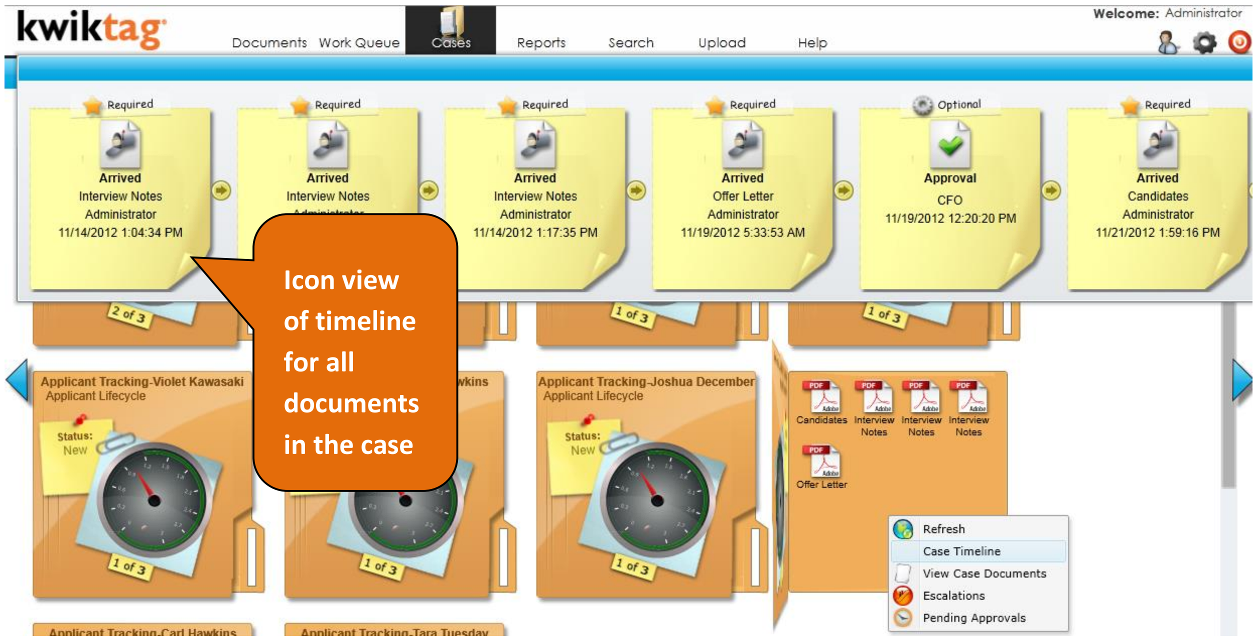

Figure 18e. Case timeline. Right click on the case and select the case timeline option to see approvals and actions related to all documents in the case.

MENU FEATURES AND FUNCTIONS: REPORTS

The KwikTag Reports tab displays a variety of different views of documents and related data. The reports available to KwikTag users depend upon their KwikTag configuration and the types of documents and approval workflows that are being used.

KwikTag Reports Menu Functions To select a KwikTag report, click on the folder icon on the left-hand side of the screen. KwikTag will then display documents and data associated with this report view. Workflow status reports are typical KwikTag reports that segment documents into Approved, Pending and Rejected categories. Each of these views can be personalized to reflect all documents, or present the view of a particular period of time (e.g. monthly, quarterly, etc.).

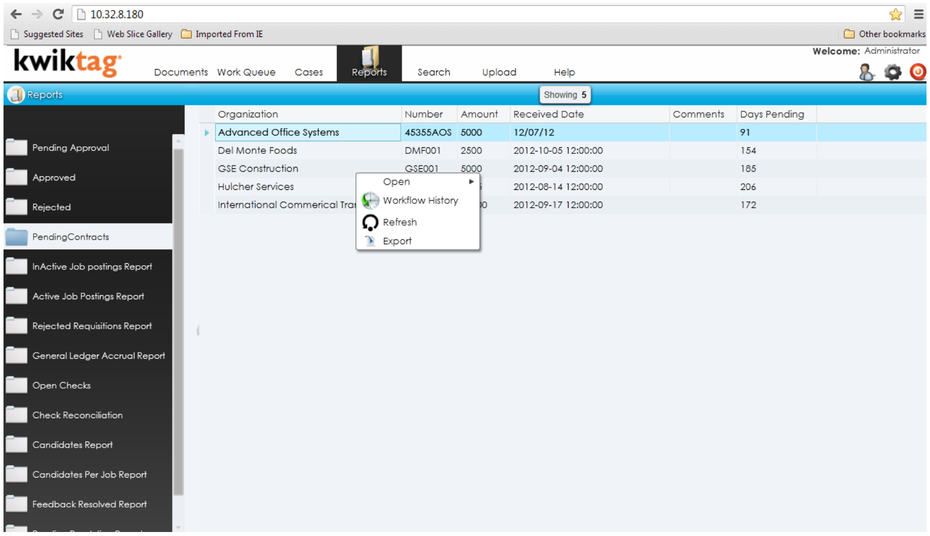

Figure 19: KwikTag Reports display documents and data that can be configured based on a variety of criteria, depending on the document type, associated data and workflow processes.

Open *(no keyboard shortcut)* presents users with the option of viewing documents within the same window, or in a separate window (ideal for multiple monitors). The Open Here option allows users to scroll through records using their mouse or keyboard while viewing the associated document image automatically. Using the Open in New Window option requires the user to select a record and then open the image in a new window (the separate window display does not refresh to show a new image as the user scrolls from one record to the next).

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Workflow History *(no keyboard shortcut)* displays a graphic view of each step that has been completed in a workflow process for documents that have been indexed and routed for approval. This function is only relevant to organizations relying on KwikTag workflow functionality. Documents that have not been routed for approval will display an icon indicating no workflow history.

Refresh (Ctrl RR) updates the view of the KwikTag Web client, so that any changes (deletions, additions, etc.) are visible.

MENU FEATURES AND FUNCTIONS: SEARCH

The KwikTag Search tab allows users to retrieve documents by searching filing information or document content. Advanced search features allow users to narrow search criteria down to specific document drawers and date ranges.

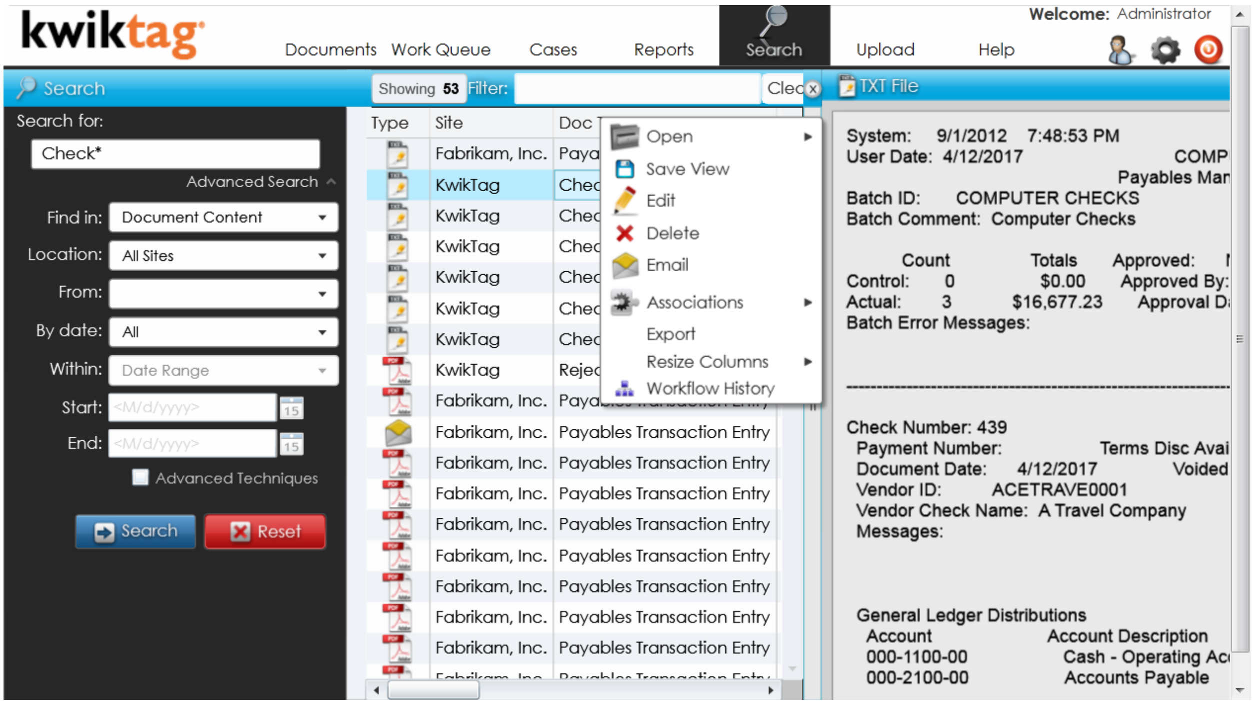

Figure 20: KwikTag Search allows users to retrieve documents based on a number of criteria including filing information and document content.

KwikTag Advanced Search. The following search criteria can be accessed by clicking the Advanced Search link beneath the Search field.

Find in: Choose between filing information or filing information <u>and</u> document content when conducting a keyword search. Document content includes text within an electronic or scanned paper document.

Location: Choose a specific site to search for documents

From: For searches based on a specific Site, the From option allows users to search either '*All Documents*' or choose a specific folder in the selected Site.

By Date: Choose the type of date for which you wish to conduct a search based on a date range. Choices include Modified date, Received date, Retention date or Tagged date.

Within: (Date range) Select how you want to conduct a date search from the drop down list. If you select '*Date Range*' enter a '*Start Date:*' and '*End Date:*'

Start: (Date) Enter a start date for the date range search

End: (Date) Enter an end date for a date range search

KwikTag Search Menu Right-Click Functions

Open *(no keyboard shortcut)* presents users with the option of viewing documents within the same window, or in a separate window (ideal for multiple monitors). The Open Here option allows users to scroll through records using their mouse or keyboard while viewing the associated document image automatically. Using the Open in New Window option requires the user to select a record and then open the image in a new window (the separate window display does not refresh to show a new image as the user scrolls from one record to the next).

To save the filtered results as a View, select the **Save View** function from the Right-click or Floating Work Queue menu. To switch between a saved, filtered view and the complete work queue, select the **Set View** function from the right-click or floating menu, then choose between Default View and Saved View. Default view always shows the complete work queue.

Edit *(no keyboard shortcut)* allows users to edit data associated with a KwikTag document, or a reservation for a document.

Delete (*no keyboard shortcut)* allows users to delete documents and records from the KwikTag system. Users are prompted to confirm before any records are deleted.

Associations allow users to view other records that have been configured to have a relationship to the document being viewed. This association may consist of metadata alone, or may include an associated document image as well. An example might include a purchase order associated with a PO invoice, or an invoice associated with a check image. Associated records are displayed in a floating that displays relevant data. Right clicking on an associated record provides the option to view an associated document.

Export *(no keyboard shortcut)* allows users to export document data from a KwikTag list view to a CSV file that can be saved locally. This function exports the document data only—document images are not exported.

Resize Columns *(no keyboard shortcut)* allows users to select format column widths by the width of column headers, column data, or a 'best fit' between the two options.

Workflow History *(no keyboard shortcut)* displays a graphic view of each step that has been completed in a workflow process for documents that have been indexed and routed for approval. This function is only relevant to organizations relying on KwikTag workflow functionality. Documents that have not been routed for approval will display an icon indicating no workflow history.

KWIKTAG UPLOAD

The KwikTag upload tab allows users to drag and drop, or navigate to documents from their PC or a network folder, placing a copy into a KwikTag drawer. Microsoft Outlook files can be added using this function by first dragging the email to the user's desktop, then navigating to, or dragging the file over, the Upload inbox icon.

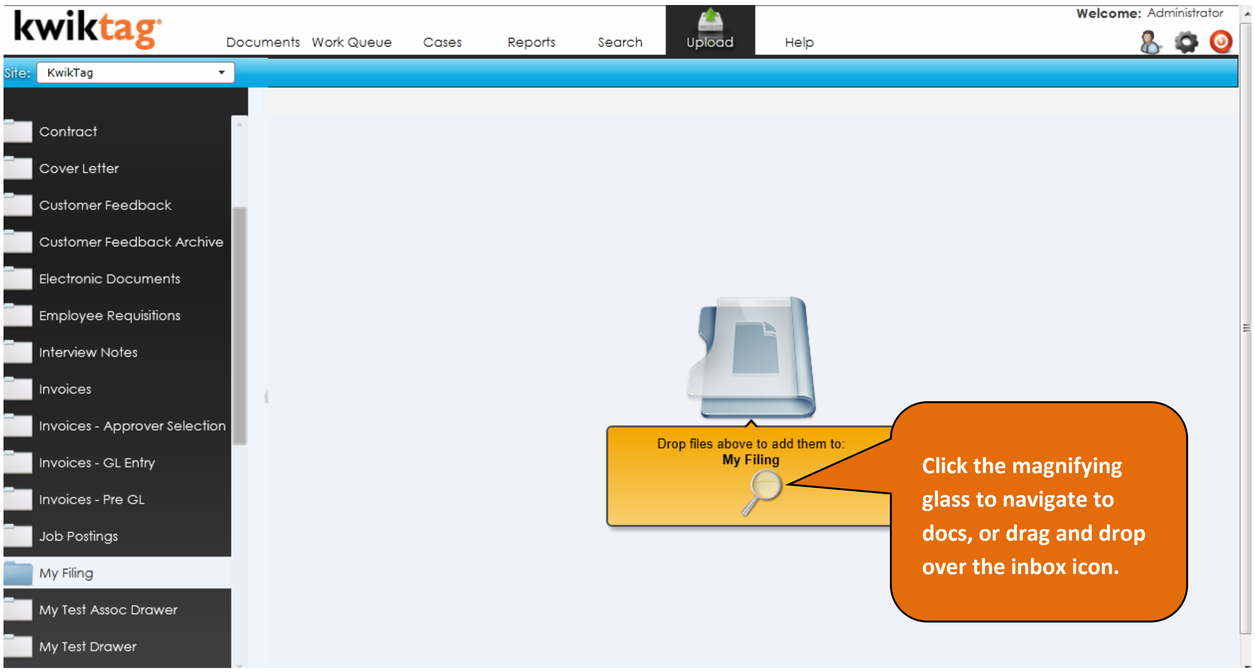

Figure 21: KwikTag Upload allows users to select a KwikTag drawer and drag and drop electronic documents into the KwikTag system.

To add files to KwikTag using Upload, simply select a KwikTag drawer from the left-hand list of available drawers. Next, select a document from a folder on your PC (or network drive) and drag it over the inbox icon located on the right-hand side of the Upload interface (Figure 17). Optionally, users can click on the magnifying glass icon to navigate to a specific file on a local or network drive.

Once you have added an electronic document to a KwikTag drawer, KwikTag will prompt you to index the document with the appropriate filing information

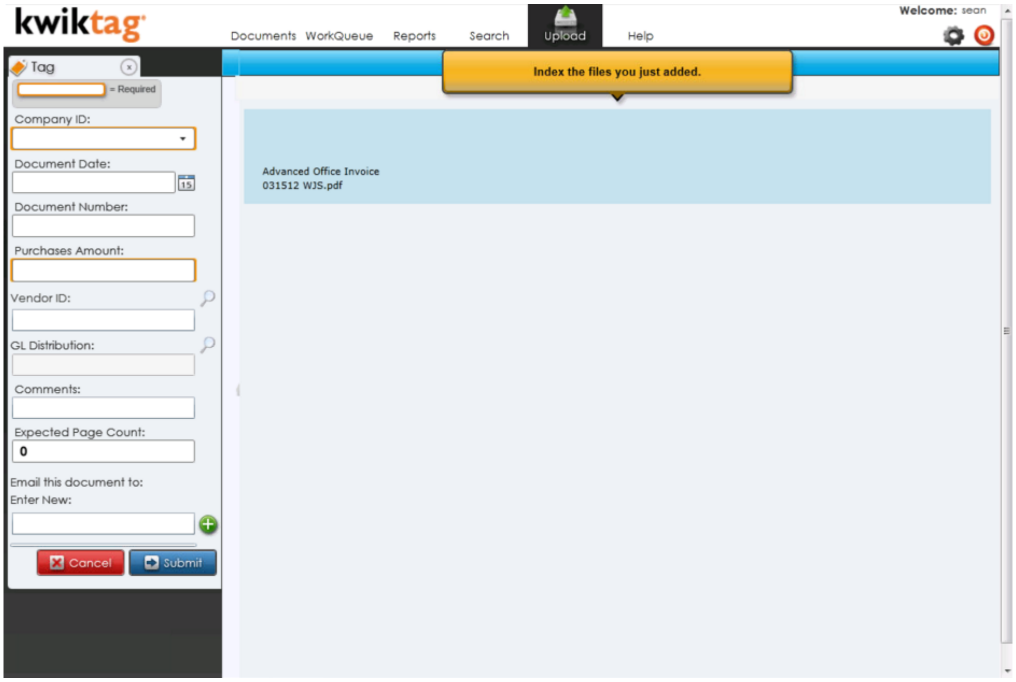

Figure 22: Once a user uploads a document to a KwikTag drawer, they are prompted to Tag the Document and insert the appropriate index data. Fields highlighted in orange are required fields. To complete the upload process, click Submit.

KWIKTAG HELP

The KwikTag Help Tab provides access to documentation, videos and KwikTag support contact information and a submission form to contact KwikTag via email.

The screen captures on the following page (Figures 21 and 22) illustrate the documentation and video content that can be accessed from within KwikTag. Note that the library of video tutorials and documentation will continue to expand. We invite you to submit your own suggestions for video tutorials or for KwikTag features using the 'Send Us Your Feedback' option.

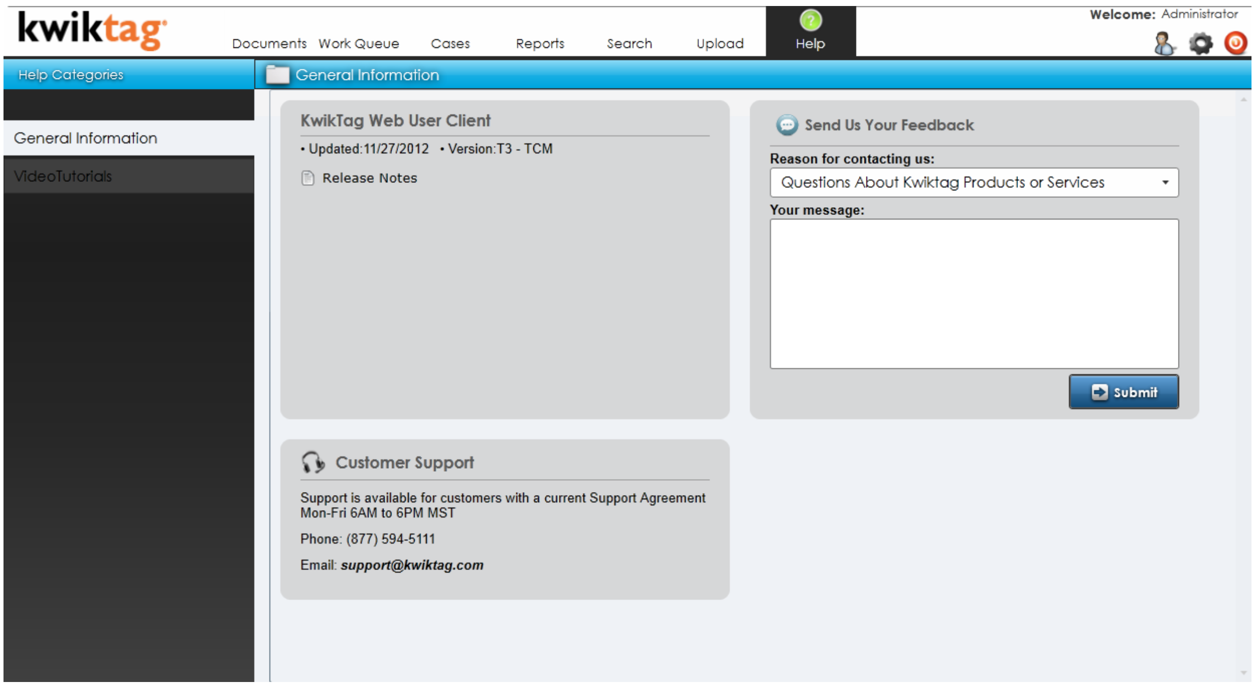

Figure 23: The KwikTag Help Tab. General information includes KwikTag version information, release notes and Customer Support Contact information.

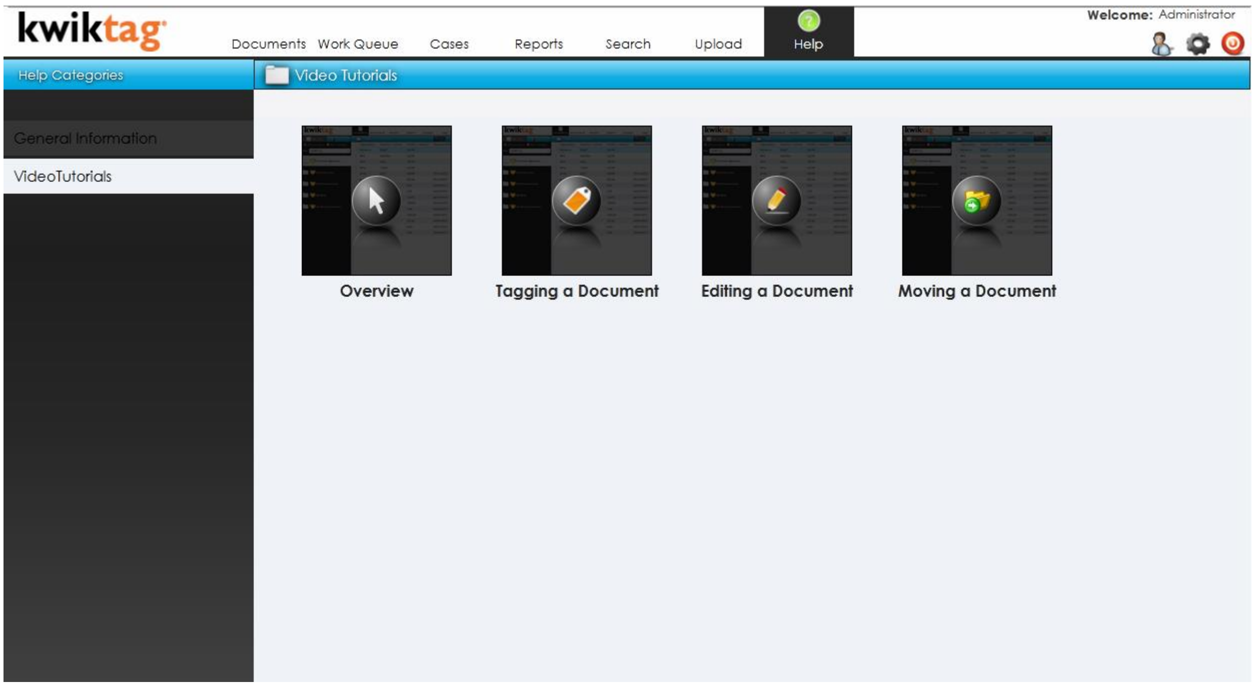

Figure 24: KwikTag help videos provide brief, step-by-step tutorials on KwikTag tasks including Tagging, Editing and Moving a Document

KWIKTAG LOGOUT AND PREFERENCES

The KwikTag Logout and Preferences icons are displayed on the upper right-hand corner of the KwikTag interface. To log out, simply click the Red Log out icon. We should show the admin icon and explain it

Figure 25: KwikTag Preferences ('Gear') and Logout ('Power button') Icons

KwikTag Preferences

Clicking the KwikTag preferences icon launches the KwikTag Preferences menu (Fig. 34). From this menu, users can change settings for how KwikTag sites, drawers and documents are displayed; Register their KwikTag physical barcode tags, or change their KwikTag password.

The **My Preferences** area of the menu includes the following options:

Default Site: for companies that have set up KwikTag with multiple sites, users can choose the site that is displayed by default

Default Home Page: choose which KwikTag tab displays automatically when logging in to KwikTag

Default time for recent documents: choose how many days worth of documents are displayed in Work Queues. For example, if the default value is "7," the KwikTag system will look back 7 days and find any documents that were added in the past 7 days.

Max number of documents to pre-load: choose the number of documents that are automatically displayed in the grid for views and drawers. Options include 50, 100 or 250 documents. The greater the number of documents pre-loaded, the more time will be required for the page to finish loading.

Retain Entries: allows users to re-purpose data entered from a previous entry when tagging a document. If this option is selected, upon clicking Submit to Tag a document, a new Tag menu will be presented for the next document that includes the data entered for the previous document. This reduces data entry when multiple documents with similar data are being processed.

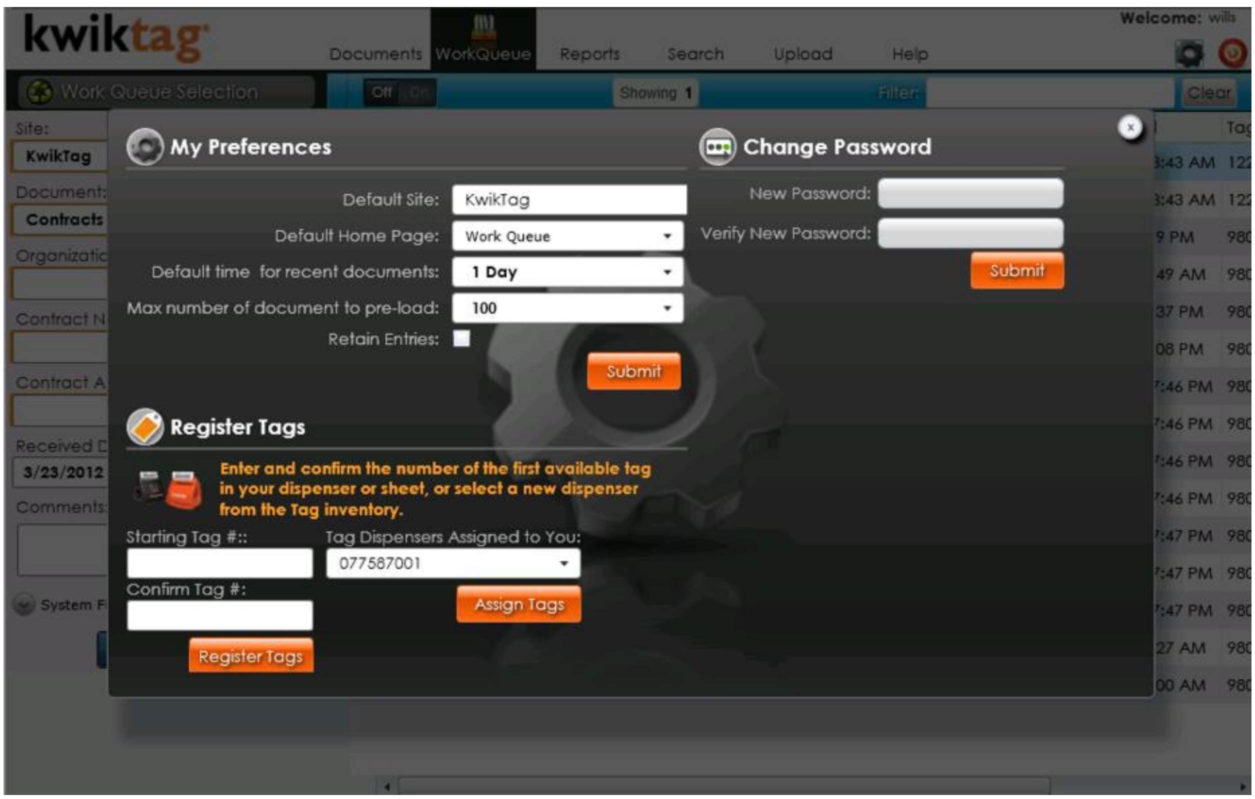

Figure 26: The KwikTag Preferences Menu

Change Password

New Password: prompts users to enter a new KwikTag password

Verify New Password: requires users to re-enter the new password. KwikTag verifies that the entries match before confirming the password change.

Register Tags allows users to enter the starting Tag number for a roll of KwikTag adhesive barcode labels that have been assigned to them. KwikTag will automatically advance the barcode number when a document has been tagged.

Starting Tag #: Enter the first barcode number that is displayed on your roll of barcodes

Confirm Tag #: Re-enter the tag number. KwikTag will verify that the numbers match before registering the tags.

Tag Dispensers Assigned to You: allows users to register multiple rolls of Tags within KwikTag. Once a roll has been exhausted and a new roll must be registered, users can select the new roll here, rather than entering the starting tag #.

This concludes this User Guide for KwikTag Web client users.

If you have any questions regarding the use of the KwikTag Web Client please contact your company's KwikTag Administrator.

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