

Three main topics are covered during the Administration and Client Training:

## Administration Site – KT Admin (<http://ktsrv1/ktadmin>)

1. Sites
  - a. Review creation of sites; must match the Dynamics companies if integrating with Dynamics
  - b. Can be used as Departmental “cabinets” if EDF system
2. Connections
  - a. Review the connection(s) created; used for the Dynamics and/or SharePoint Connectors
3. Drawers
  - a. Create a drawer
  - b. Review drawer structure and properties
4. Users
  - a. Review user and group creation; license structure
5. Reports
  - a. Show sample reports: Drawer Statistics, Indexed Documents, User Statistics, Security, Sub System Versions
6. Settings
  - a. Review various system settings; such as licensing KwikTag, Password policy, System Management (NEWS screen)
7. Workflow
  - a. Review the workflow rules that have been configured

## NEWS Site – System Updates (<https://ktsrv1:3886>)

1. Available Updates
  - a. All updates available to download to system
2. Update Status
  - a. Shows download status
3. Updates to Install
  - a. All downloaded updates
4. Install Status
  - a. Shows progress of updates selected to be installed

## Client Site – KT Client (<http://ktsrv1/ktclient>)

1. Documents
  - a. Home
    - i. Most Recent Documents; default page
    - ii. Preference settings
  - b. My Lists
    - i. Saved drawer and system wide searches; favorites list
    - ii. Real time database queries
  - c. Library
    - i. Shows all drawers within a system “site”
    - ii. Can pin certain folders to the main page as a favorite
    - iii. Each folder represents a drawer in the site; clicking on the individual folder will show all of the documents in that drawer
  - d. Icons within the My Lists and Library views
    - i. Tag
    - ii. Search
    - iii. Open/View
    - iv. Delete (if permission rights)
    - v. Work Queue
    - vi. Save Lists
    - vii. Refresh

2. Work Queue
  - a. Lists of documents to be worked on/routed through the system
3. Search
  - a. Will search across all documents in the system; difference between drawer and system-wide searches; saving searches
4. Help
  - a. Customer Support information

## Dynamics Integrated KwikTag Client

1. Microsoft Dynamics GP
  - a. Creates an “Additional” menu in the KwikTag enabled screens
    - i. Tag Document
      1. Can use eCover for tagging
      2. Show “Properties”
        - a. Allows you to notify users when a document is received
        - b. Shows file format
    - ii. View Document
      1. Shows all documents linked to that record
    - iii. Search Document
      1. Can search by filing information or document content; system wide search
    - iv. Delete Document (if permission rights)
    - v. Work Queue
      1. Shows items initially indexed in KwikTag that have already been routed for approval and have been approved
      2. Clicking create from within this queue will create the transaction in Great Plains; only will create a Purchase Order or an Invoice