

web 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 Web 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 Web 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)

3. 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.

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GETTING STARTED

Logging into your KwikTag Client

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

kwiktag[.]

		Kinkrag Achimistation
by Imagetag	Username: Password:	
elegant Lowest TCO Simple complete		
i Imagetag		© 2011 ImageTag, Incorporated

Figure 1: KwikTag Login 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'/ 'My Lists' Tab, or the 'Work Queue' Tab.

kwiktag[.]

Vielcome Vull S | Logout | Preferences

My Lists Library		¢	Mos	st Red	ent							
Most Recent									Sea	arch:		Clear
My New Documents		L ÷ Nu	lag ÷	User ‡	Pages	- Uoc Туре	÷	v ÷	Name 4	Tagged ÷	Scanned ¢	Modified
Pending Approval		980	0000104	TaraJ	1				ktappb01_980000104_0	4/27/2011 9:37:00 AM	4/27/2011 9:37:00 AM	4/27/201 9:37:00 A
Approved	a i	123	2097210	TaraJ	2	Z			ktappb01_122097210_0	4/27/2011 9:18:10 AM	4/27/2011 9:26:20 AM	4/27/201 9:26:20 A
Rejected		122	2097211	TaraJ	1	Z			ktappb01_122097211_0	4/27/2011 9:20:21 AM	4/27/2011 9:26:16 AM	4/27/201 9:26:16 A
		122	2097212	TaraJ	1	Z			Happb01_122097212_0	4/27/2011 9:21 31 AM	4/27/2011 9:26:14 AM	4/27/201 9:26:14 /
		900	0000100	TaraJ	1				ktappb01_900000103_0	4/27/2011 9:23:11 AM	4/27/2011 9:23:12 AM	4/27/201 9:23:12 A
		980	0000102	TaraJ	1				ktappb01_980000102_0	4/27/2011 9:22:12 AM	4/27/2011 9:22:13 AM	4/27/201 9:22:13 A
		075	943152	ionm	1	Z			Mappb01_079943152_0	4/26/2011 1.58.58 PM	4/26/2011 1.58.58 PM	4/27/201 9.18.35 A
		075	894 3153	jonm	1				stappb01_079943153_0	4/26/2011 2:02:27 PM	4/26/2011 2:02:28 PM	4/27/201 9:12:08 A
		033	1713103	Volts	1				ktapp501_033713103_0	4/26/2011 10:28:43 AM	4/26/2011 10:28:45 AM	4/26/201 10:36:03 AM
		033	3713104	Wills	1	1			Happo01 033713104 0	4/26/2011 10:28:43	4/26/2011	4/26/201

Figure 2a: Landing Page – Documents

My Lists		C		Active	do	cuments	1	need	to	work		a \$			
All documents i have worked											0	earch:		Clear	Ð
a procuments i need to index		Site	ŧ	Document	\$	Tag Number	\$	Status	•	Action	\$	Date Received	ŧ	Comments	+
 Documents i need to approve 		KwikTag		1		053833061		New		Тар		4/12/2011 11:15:11	AM		
Documents : need to edit	-1	KwikTag		Z		0506030662		New		Tag		4/12/2011 11:15:11	AM		
Cronen documents i need to to		KwikTag		E		050600057		New		Tag		4/12/2011 11:15:11	АМ		
		≺wikTag	į.	1		050502133		New		тар		4/12/2011 11 16:09	АМ		
		KwikTag	9	2		021565578		New		Тау		4/12/2011 11.16.09	AM		
	11	KwikTag		Z		002501200		New		Тад		4/12/2011 11:16:10	АМ		
		KwikTag		1		020466043		New		тад		4/12/2011 11:16:10	АМ		
		KwikTag		T		005185563		New		Тад		4/12/2011 11:17:11	MA.		
	Л	Kwikilag		T		005485569		New		laq		4/12/2011 11:17:11	MA.		
		Kwikileg		7		005486570		New		1 ag		4/12/2011 11:17:11	AM		

Figure 2b: Landing Page – Work Queue

PREFERENCES: SETTING DEFAULT PAGES AND REGISTERING KWIKTAG BAR CODE LABELS

1. Click on 'Preferences' - 'My Preferences' dialog box will open

kwiktag [.]	Click 'Preferences'	Welcome Wills Looput velerences
Documents Work Queue Search Help		
My Lists Library My Filin	g	
My Preferences	×	
	Change Password	
Default Home Page: Work Queue	Select Default Home Page	
Default time frame for recent documents: 1 day	Confirm Password	
Max number of document to pre-load: 100 💌		
Register Tags		
Enter and confirm the number of the first available sheet, or select a new dispenser from the sheet of the first available sheet of	e tag in your dispenser or ne Tag inventory.	
Tag Dis	pensers Assigned to You:	
Starting Tag #:	Enter starting barcode label #	
Confirm Tag #: OR		
	Confirm starting barcode label #	
Register Tags		

Figure 3: Preference Dialog Box

- 1. Select a default home page from the drop down list. Typically, KwikTag workflow users will want to choose the Work Queue option. Non-workflow users will most often choose the 'Documents' tab as their default home page.
- 2. To register your roll of KwikTag bar codes, enter the 'Starting Tag #' (this will be the number on your first KwikTag Barcode Label)
- 3. Enter in the same barcode label number in 'Confirm Tag #'
- 4. Click Register Tags

You will receive a 'Registration successful' message under the 'Register Tags' Button. In the bottom right hand side of the My Preferences dialog box, under 'Tag Dispensers Assigned to You:' you will see the starting KwikTag Barcode Label number that is assigned to you.

My Preferences	×
	Change Password
Default Site: KwikTag	Old Password
Default Home Page: Work Queue	New Password
Default time frame for recent documents	S: 1 day 💌 Confirm Password
Max number of document to pre-load: 1	
Submit	
Register Tags Enter and confirm the number of the fi sheet, or select a new disper	rst available tag in your dispenser or user from the Tag inventory.
1	Tag Dispensers Assigned to You:
Starting Tag #:	eCover 062085001 Starting barcode label #
Confirm Tag #:	033713001
Register Tags	Successful registration confirmation message
Registration successful.	

Figure 4: Registration Successful

By registering your bar code labels, you have ensured that any documents that you have tagged with a barcode and scanned or faxed with the appropriately-configured device will be accessible from your KwikTag Web client.

Other options in the 'My Preferences' screen:

- Default Interval for Document View this setting determines how long documents are held in 'My New Documents' folder
- Change Password this is where you change the password that you use to log into KwikTag

MAIN NAVIGATION OVERVIEW: DOCUMENT, WORK QUEUE, SEARCH AND HELP PAGES

kwiktag [.]	4 Tabs	Welcome WilS Logout Preferences
Documents Work Queue	Search Help	

Figure 5

1. Documents

The Documents page allows users to navigate to all the documents stored in KwikTag that are accessible to them based upon their unique login credentials and assigned bar code labels.

2. Work Queue

The Work Queue page provides users with options for indexing, reviewing and approving documents to be processed as part of an automated workflow.

3. Search

KwikTag global search functions are available from the Search tab, allowing users to search for any document accessible to them based upon their unique login credentials and assigned bar code labels. Additional search functions can be accessed from individual KwikTag document drawers, for more granular search and filtering capabilities.

4. Help

This is where you will go to find Customer Support hours, contact information and to send Support an email. You will also find release notes, the KwikTag Web User Client version and latest update.

THE DOCUMENT PAGES

The Document page includes two tabs: (My Lists and Library)

MY LISTS TAB

The My Lists sub-tab contains the 'Most Recent' and 'My New Documents' folders by default. In addition, users can create their own custom lists to be saved and accessed from this sub-tab.

- 1. *Most Recent* contains documents pre-sorted by date, for a period of time defined in your 'Preferences' setting. By default, My Recent Documents displays documents from the past day, but can bet set to include up to 90 days worth of recent documents.
- 2. *My New Documents* contains documents you have recently filed. The length of time these documents will stay in *My New Documents* is determined by the '*Default Interval for Document View*' setting in 'Preferences'

To edit or remove items from the My Lists Tab:

- 1. Click the 'Edit or Remove' Button, the 'My Lists' view will change to edit mode
- 2. Click the 'Pencil' icon to edit a list name. Click the 'X' icon to delete a list view

	Library
	Edit or Remove Button
1	Click to edit the name
UAT GP Documents	
UATGP	Click to delete the view
What am I	
avid search view	

Figure 6

LIBRARY TAB

Default Folders

There are two default folders within the Library tab:

- Lost and Found This will list documents that you scanned but KwikTag does not know where to file them. This is caused by neglecting to complete 'Step 1 of the File, Tag and Scan' process. A 'reservation' was never made for the barcoded document that KwikTag received.
- 2. My Filing- This folder is used to file documents for your personal use. It has fixed filing fields.

Additional KwikTag folders accessible to the user can be viewed by clicking the 'All' button. Users have the option of selecting which of these folders they wish to add to their default library view, as described below.

Documents Work Queue Search Help

Figure 7: Library Tab - Default

VIEWING ALL FOLDERS AND ADDING/REMOVING FAVORITES

Clicking on the All button will display, in the Library panel, by Site, all of the folders that you can access.

	Documents Work Queue Search Help
	My Lists Library Site
	Site: KwikTag
Documents Work Queue Search Help	Contracts In Process
My Lists Library	Employee
All Button: expands folder view	
My Filing	Purchase Orders
Figure 5: Library View - All	Tier Approval Invoices
Figure 8a	Figure 8b

FAVORITES

'Favorites' make it easier to select the folder with which you want to work.

To add folders to or remove folders from your Favorites:

- 1. From the Library tab Click All
- 2. From the Site drop down list Select the Site that contains the folder(s) that you want to add to your Favorites
- Click on the +/- Button another window will open listing the folders available to you from the Site that you selected



Manage Favorites		3	ĸ
Site: Fabrikam, Inc.		My Files	
Applicant Applicant Costs Applicant Education Applicant Interview Rating Applicant Offers Applicant References Applicant Requisitions Applicant Skills Applicant Tests	Select folder	s from this list	
Applicant User Defined Applicant Work History	+		
Add >>		<< Remove	

- 4. **Select** the folders that you want to add from the 'Site' list. Note: You can multi-select by holding down the 'Ctrl' Button on your key board.
- 5. **Click** on '*Add* >>'

Manage Favorites	×
Site: Fabrikam, Inc.	My Files
Employee Review Employee Tests Employee Training Employee Transfer Request Employee Financial Batch Entry General Ledger Leave Initiation Payables Batch Entry Payables Manual Payment Entry Payables Transaction Entry	Bank Transfers Customer Fixed Assets
Add >>	<< Remove
S	ubmit

Figure 10

- 6. To Remove a folder or folders from your Favorites, Select on the folder(s) under 'My Files' and **Click** on '<<*Remove*'
- 7. Click Submit

To view your 'Favorites' **Click** on the *Heart* Button.

Documents Work Q	ueue Search Help
My Lists	Library
12	Click to view your favorites
Site: Fabrikam, Inc.	
Figure 11: Favorites View	

FOLDER OPTIONS

Once you select a folder from within the Library view, you will see a list of documents in that folder, in addition to a series of four icons in the upper right hand corner of the screen/window (Figure 12):

Documents Work Queue Search Help	Folder Options
My Lists Library Lost and Found	sument(s) Found.
Figure 12: Option Links	



Performs a keyword search from the current folder based on criteria within any of the indexed fields for documents in that folder.



2.

Save Lists

Saves a view of documents that currently meet specific search or filter criteria you have selected. The saved view will be listed on the 'My Lists' tab.

3. Refresh Option Refreshes your screen



Exports indexed data from the view of documents in that folder to an Excel spreadsheet for reporting or analysis.

DOCUMENT OPTIONS

From 'Documents' - 'My Lists' you can view, delete, search for documents from the 'Most Recent' and 'My New Documents' or Select the 'Library' tab, Click on 'All', Select the Site and then the folder that contains the document(s) that you want.

Documents filed into the selected folder will be listed on the right side of the screen. Clicking on a document line item will highlight the item, resulting in the presentation of several new icons to the upper right side of the screen, as described below.

Ocuments Work Queue Search	Help			Folder	Name			Optio	ons	
My Lists Library	1		nvoices	5			M Q	Ì O	I \$	
Site: KwikTag DOC	umen	t list (seleo	cted doc	ument is	highlight	ted)	Search:			lear
Contracts in Process		Company +	Document + Date +	Number	Amount	·~ D ÷	GL #	Comments 4	Number +	Us
Invoices		Fabrikam, Inc.	04/22/2011	45634	1000.00	BEAUMONT0001	2 courselected		033713001	w
Multi Index Invoices		Fabrikam, Inc.	04/19/2011	1234	4500	ADVANCED0001	2 codes selected		053833065	Admin
Purchase Orders		Fabrikam, Inc.	04/13/2011	1234	12000	ADVANCED0001	2 codes selected	dpd OK	054319702	Admin

Figure 13

DOCUMENT VIEW OPTIONS



'Tag' allows users to enter index information and create a reservation for a new document, or display information for a document that has been indexed



→ 'Open' will open the document for viewing including the filing information. Alternately, users can choose to double-click on a selected document



> 'Delete' will delete the selected document if you have permissions



If you try to view a document for which KwikTag has received a reservation, but the document has not yet been scanned into the system, you will receive the following message:



Figure 14

The document view will indicate that the document image has not been received by displaying an icon with a question mark symbol:

My Lists Library		r Ir	voices					30000
		-						
KwikTag 🔳)							
nvoracsi		€ Amount €	WF_Status ¢	Number +	tacr ≎	l'agca ‡	Don Type : V : L :	Document Not Received
My Filing	4	112.51	New	054670181	Administrator	o	H	615:44 Document Received
Uningwn		250.00	Reject	090155010	Administrator	1	2	7:05:30 7/15/2010 7:05:35 PM
WF_homices		.		005155007	(dele lessator		=	//15/2010 //15/2010



INDEXING AND TAGGING A DOCUMENT

You can file documents into any drawer to which you have permissions whether you have selected it as one of your Favorites or from the '*All*' view. The ability to choose a Site can only be found when in the All view.

- 1. From the *Library* Tab, Click on 'All' Button
- 2. From the Site drop-down list Select the Site that contains the folder(s) into which you want to file documents
- 3. Under the selected Site, Click on the folder into which you want your document to be filed and tagged
- 4. Click the Tag Button

NOTE: Sites are groupings of folders. Access to a Site is based on permissions. If you do not have permission to access a specific Site you will not see it on the drop-down list

kwiktag		Welcome WillS Log	gout Preferences
Documents Work Queue Searce 1.	Select Site		
My Lists Lit Sife KwikTag	2. Select Folder	Search:	
Contracts In Process	Company & Document & Document & Purchase ID Date Number & Ar	Vendor D + GL Distribution + Comments + Nun 2 codes	ag ÷ nber
Figure 16	3. Click 'Tag' button	ADVANCED0001 selected 0538	333065 ,

The 'Tag Document' screen displays the custom filing fields of the folder that you selected. In the figure above, the Invoices folder has been selected.

Tag Document Site: KwikTag Document Type:	Index Fields with red borders are required fields
Company ID	
Document Date:	
04/22/2011	Clicking on the 'Date' field will
Document Number:	produce a calendar display of
Purchases Amount:	selectable dates
Vendor ID:	
GL Distribu ^{tion} :	Expected page count (optional)
Comments:	
Expected Page Count	
0 🚨 🔛	
Tag Number:	
033713001	Confirm that the tag number displayed matches
Email this document to:	the number on the KwikTag barcode label in you dispenser
Submit Cancel	

Figure 17: Indexing and Tagging a Document

- 5. Enter the document index information
- 6. Enter Expected Page Count:
 - a. This is the number of pages that the document contains. If the document is double sided each side counts even if it is blank. Blank is the default which disables this function. It is recommended that you use the *Expected Page Count* function. KwikTag uses this to reconcile that it received the correct number of pages from the scanning device
- 7. Confirm that the Tag Number displayed matches exactly with the next KwikTag Label in your dispenser. If not, use the up or down arrows to correct it or type in the correct number
- 8. **Place** the KwikTag Barcode Label on any white space area on your document. If the document is more than one page place the label only on the first page
- 9. Click Submit

The system will display a confirmation message that the document was tagged with the barcode you entered, see Figure 18 below. Remove any staples and/or paperclips and place the tagged document in your KwikBasket. When you are ready, fold and seal the KwikBasket. Take it to a scanner configured to scan to KwikTag, open the KwikBasket, place the documents in the feeder and scan them.

Tag Document	
Site: KwikTag	
Document Type: Invoices	Confirmation Message
Jocument was ladded with datcode	
054670161 Comments:	

Proprietary & Confidential

SEARCHING FOR A DOCUMENT

KwikTag provides you with three different options to search for documents:

GLOBAL SEARCH

From the KwikTag Search menu tab, you can choose to search based on filing information or content within any scanned document in your KwikTag repository.

kwiktag	KwikTag Search Tab (Global Search)
Documents Work Queue Search HelD	
Search	
Search For:	Subarit Guerge Schelard Scouts
igure 19	

DETAILED SEARCH

By clicking the KwikTag binoculars icon from within a drawer in your KwikTag library, you can choose to search for documents based on any index fields associated with the documents in that drawer.

VIRCag										KwikTag Documents Library
ments Work Queue Search Help										RWIRIng Documents Library
VI allow you to perform keyword search your current folder. Criter search inter a lanv of the fields below and click search Gempany ID		Invoices					2		0	Detailed Search (by index field)
Decement Date.	Company e	Data med a	Ducureul Number	Furchases Amount	Vendor D 🕈	Gl Gl Brechulin 4	Comments =	Tag +	(ear) Us	
Perchases Amount	Fabrikanı, İrst	04/22/2011	40034	1000.00	ULAUMUNI (001	2 codec selecte (035713001	w	
Vendar I P	Fabrikam,	04/19(2011	1234	4500	ADVANCED0001	2 ondes adiction		050000005	Admin	
Ci Demberor	Fabrikam,	01/13/2011	1234	12000	ADWARGED0001	2 cades adjection	dpd OK	054519702	Adm	
Tag Kumber:	Tabritam, r:	4/12/2011	MS- 97203473	3110	ADWANCED0001	2 codes selected	dad uk 9	062065139	w	
Scarch Cancel	abritam,	04/11/2011	Ij-3478	158.00	BEAUMONTCOOL	2 codes selected		082085110	w	

Figure 20

SEARCH FILTER

From within your KwikTag lists or library, you can choose to filter documents by keyword.

ments Work Queue Search Help										
My Liste Search Filter	(list o	r libra	ry ke	eywoi	rd filter		Search:			Clear
	1 =	Tag Number \$	user o	Pages ¢	Doc + v +	Name 🖨	Tagged \$	Scanned ÷	Modified V	Reten
Hending Approval		122097209	TaraJ	1		ktappb01 122097209)	4/25/2011 11:42:22 AN	4/25/2011 11:51:40 AM	4/25/2011 11:51 40 AM	
Bootval					-		4/25/2011	4/25/2011	4/25/2011	
Approved Rejected		980000101	TaraJ	1	L	dappb01_020000101_0	11:48:30 AN	AM	AM	

Figure 21

GLOBAL SEARCH

kwiktag [.]	KwikTag Search Tab
Documents Work Queue Search Help	(Global Search)
Search	
Search	

Figure 22

1. **Click** on the *Search* Button

						Filte	r		Clear	Search Button
Commenta 🕈	Company ¢	Document +	Document +	Document Type	Filo Nam	•	Purchase Crder Number	+ Vondor ID	+ Vouc	
Training Document	Training Company Inc.	7/21/2010	1909	Invoice			P01357	Acms Toy Compan	00 Y	
	Fabrikam, Inc.	07/20/2010							9	
	Fabrikam, Inc.	07/15/2010							000000	
helo	1234	7/15/2010	1204	1234	ус	5	654	lando		





Figure 24

- 2. Enter the search criteria in 'Search For:' and Click Search. The search criteria can contain a wildcard (*), such as 'PO13*', the search will return all results containing 'PO13'
- 3. The results of the search will be displayed below

						_		
	Search For: POr	1357			Se	earch 📄	etailed Gea	rsh
			N	/latch	Filter			Clear
					- n.cr			
Doc Type ≑	L # Document #	Match ¢	Four #	Scanned \$	Pages ¢	User 🗘	Tagged ¢	Number
							7/21/2010	



4. The 'View' of the Search results can be saved by clicking on 'Save View' button



DETAILED SEARCH

- 1. As in the Basic Search, above, Click on the Search Button. When the Search window opens
- 2. Click on 'Detailed Search'
- 3. Enter the search criteria in 'Search For:'

wiktag [.]							Actour	e wans i cogo	1)-nocionocs	
uments) Work Queue Search Help									_	KwikTag Documents Library
VII allow you to perform keyword search your current folder. Citer search criteria any of the fields below and citic search Gemaany ID		Invoices	5			1	2 1			Detailed Search (by index field)
Document Date:	Comerce	Dansated	Durment	Eur former		Search		(i	*#) *	
Document Humber.	n i e	Dale =	Number	Amount	VendorilD :	Deciulin	Comments a	Number *	Js	
Perchases Amount	Fabrikanı, Its:	04/22/2011	40034	1000.00	ULAUMONICOON	2 codec selected		035713001	w	
Wendar Lit	Fabrikam,	04/19(2011	1234	4500	4DVANCED:001	2 oadica aclocitot		055050005	Admin	
Ci Betributere	Fabrikam, Inc.	04/13/2011	1234	12000	ADWANGED0001	2 codica adioritoti	dpd OK	054519702	Admin	
Tag Kumber.	Tabritam, Inc	4/12/2011	MS- 97203473	3110	ADWANCED:0001	2 codes selected	dod ok 9	062035139	w	
Scarch Cancel	abritam,	04/11/2011	Ij-3478	105.00	BEAUMONTOOL	2 codes		082035119	w	



- 4. From the 'Detailed Search' fields you can select:
 - a. Find in: Choose either 'Filing Information' or 'Filing Information & Document Content'
 - b. *By Location:* Search across all of the Sites that you have permissions to access or from the drop down list Select the Site you want to search
 - c. *From:* If you have selected '*All Sites*' the search will look for '*All Documents*', if you selected a specific Site then you can search either '*All Documents*' or from a specific folder in the selected Site
 - d. By Date: (Optional) Left at the default 'All' the search will look for all documents regardless of the date.
 You can pick a date, from the drop down, to limit your search by. If you select a date then the 'Within:', 'Start Date:' and 'End Date:' fields will become active
 - e. Within: Select how you want to do the date search from the drop down list. If you select 'Date Range' enter a 'Start Date:' and 'End Date:'
- 5. As with the Basic Search the results will be displayed below

FILTERING THE CONTENTS OF A FOLDER

You can filter the contents of a folder to find a specific document or a grouping of documents.

1. From the folder view type in your filter criteria in the *Filter* window

	Search f	ilter (li	st or l	ibrar	y k	eyword filte	r)	Welcor	ne wile Lo	jout Prefer
My Lists Library		Most F	Recent				Search			Clear
My New Locuments	t = Tag Numb	er ‡ User	≎ Pages ¢	Doc +	v :	Name 😂	Tagged \$	Scanned ÷	Modified V	Retention Date
Pencing Approval	12209	7209 TaraJ	1			ktappb01 122097209 0	4/25/2011 11:42:22 AN	4/25/2011 11:51:40 AM	4/25/2011 11:51 40 AM	
Rejected	98300	0101 TaraJ	1			ktcppb01_080000101_0	4/25/2011 11:48:30 AN	4/25/2011 11:48:40 AM	4/25/2011 11:43 40 AM	
	00088	U100 TaraJ	1	2		ktappb01_980000100_0	4/25/2011 11:48:23 AM	4/25/2011 11:48:24	4/25/2011 11:43:24	

Figure 28

2. As you type into the *Filter* window KwikTag will filter the documents until only the ones that match you search will remain

											Fil	ter:	uatgp		0	lear
. •	Tag + Number +	User	÷	Pages	÷	Doc Type	÷	∨ ¢	Name 4	Tag	iged	¢	Scanned	÷	Modified	•
	98000002	uatgp		1		Ð				7/20	0/201 :47 P	0 M	7/20/2010 2:38:49 PM	4	7/20/2010 2:38:49 P	D M
	98000001	uatgp		1						7/20	0/201 :44 H	0 M	7/20/2010 2:37:50 PM) 1	7/20/2010 2:37:50 P) M

3. To clear the results, Click the '*Clear*' button. This will return the the screen back to showing all of the documents in the folder

HOW TO SAVE A VIEW

You can save a view of your search or filter results. You can also save a view from a folder.

1. From your search results, click the 'Save View' icon to save the list of documents

								Filter	uatgp	Clear		
-	Tag Number ♥	User	÷	Pages \$	Doc Type	• v :	• Name •	Tagged \$	Scanned ¢	Modified v	R	
	980000002	uatgp		1				7/20/2010 2:38:47 PM	7/20/2010 2:38:49 PM	7/20/2010 2:38:49 PM		
	980000001	uatgp		1				7/20/2010	7/20/2010	7/20/2010		



2. A dialog box will open enter a name for the View, then **Click** *Submit*



Figure 31

3. A message will be displayed stating that your view has been saved. Click the'X' to close the message



Figure 32

4. You will see the saved view in My Lists



Figure 33

Follow the same steps to save a view after you have scanned documents or used the filter feature.

CUSTOMIZING COLUMNS

Under My Lists or Library you can modify the view of a folder by adding or removing columns in the view. Click on the **'Customize Columns'** button at the bottom of the list.

nents Work Queue Help										Kara.	fag Administra
My Lists 🔰 Libra	ry 🔪	12	My Fi	ling					(e H	I \$
Lost and Found									F Iter		(Clear)
Ky Tillog		Subject ¢		Description #	Tag Number ¢	l iser o	Pages \$	Duc =	V t l t Name	t Tagger t	Scatted :
	4	National Registered Agents Inc	08/13/2010		018505502	Ginger	1			7/5/2010 11:53:10 AW	7/5/2010 11:55 26 AM
		R L Schware	05/17/2010	Hremier Parliter	010508501	Cinger	2			7/5/2010 11:52:40 AV	7:5/2010 11:55 24 AM
		Straightline	04/28/2010	Fremier Parmer	018000511	Oinger	1			//5/2010 11.52.08 AM	7.5/2010 11.50 22 7/M
		AuvessTek	05/17/2010	Fremier Parmer	018500510	Oinger	1			//5/2010 11.51.34 AW	//5/2010 11.50.21 //M
		ADV	DC/30/1954	AP	018506509	Ginger		72		//6/2010	7,5,2010
		Cybershift	08/31/2010	Invoice 9691	018506508	Gin	Cus	ston	nize Colu	imns	
	_	Show 10	entries	otrias			>	_			N. F
		C				11)					>
		Customize	Colours								

Figure 34

1. A dialog box will open showing all the columns that are available



Figure 35

Select or De-select the Columns that you want to have displayed. Click Submit.

SORTING COLUMNS

Sorting allows you to group documents together based on a column heading.

1. Click on a column heading will sort the documents in ascending order

Before Sort					So	rt will	be or	n Tag Ni	ımber		
	Subject ¢	Date 💠	Description \$	Tag Number ÷	User 🗧	Pages 🖨	Doc Type =	V 🕈 L 🕈	Name 🖨	Tagged \$	Sca
	Offer Letter	2010-07- 22	Don Fake	054670171	Administrator	1				7/22/2010 10:09:16 AM	7/2: 10:
	bv	07/15/2010		054670154	Administrator	1		Y		7/15/2010 7:06:19 PM	7/1! 7:01
	sdfsd	07/15/2010		054670158	Administrator	1		Y		7/15/2010 6:59:52 PM	7/1! 7:01
	asdasdas	07/15/2010		054670159	Administrator	4		Y		7/15/2010 6:59:58 PM	7/1! 7:01
	sfdds	07/15/2010		054670157	Administrator	1		Y		7/15/2010 6:59:44 PM	7/1! 7:01
		07/15/2010		054670155	Administrator	1		Y		7/15/2010 6:59:27 PM	7/1! 7:01
		07/15/2010		054670156	Administrator	4		Y		7/15/2010 6:59:31 PM	7/1! 7:01
	test	07/15/2010		054670154	Administrator	1		Y		7/15/2010 6:59:20 PM	7/1! 7:01
	dsasad	07/15/2010		054670160	Administrator	0	7			7/15/2010 7:00:04 PM	

Figure 36

After Sort						(Click	arrow	to reverse the	sort	order
	Subject ¢	Date 🗢	Description \$	Tag Number	User 💠	Pages -	-	-	and the tayyou +	340	
	test	07/15/2010		054670154	Administrator	1		Y	7/15/2010 6:59:20 PM	7/1: 7:01	
	bv	07/15/2010		054670154	Administrator	1		Υ	7/15/2010 7:06:19 PM	7/1! 7:01	
		07/15/2010		054670155	Administrator	1		Y	7/15/2010 6:59:27 PM	7/1! 7:01	
		07/15/2010		054670156	Administrator	4		Υ	7/15/2010 6:59:31 PM	7/1! 7:01	
	sfdds	07/15/2010		054670157	Administrator	1		Y	7/15/2010 6:59:44 PM	7/1! 7:01	
	sdfsd	07/15/2010		054670158	Administrator	1		Y	7/15/2010 6:59:52 PM	7/1! 7:01	
	asdasdas	07/15/2010		054670159	Administrator	4		Y	7/15/2010 6:59:58 PM	7/1! 7:01	
	dsasad	07/15/2010		054670160	Administrator	0	?		7/15/2010 7:00:04 PM		
	Offer Letter	2010-07- 22	Don Fake	054670171	Administrator	1			7/22/2010 10:09:16 AM	7/2: 10:	

Figure 37

DOCUMENT ROUTING AND APPROVAL WORKFLOW

THE KWIKTAG WORK QUEUE

The KwikTag Work Queue page is designed to support users who wish to rely on KwikTag's ability to route documents for review and approval from an indexer's work queue to any number of approvers in a defined business process. Workflows can be pre-configured by KwikTag's 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.

There are three basic steps in any workflow process—with an additional step available for KwikTag customers that rely on Microsoft Dynamics ERP systems:

Tag and scan the document to be routed for approval. These steps were described in detail on the first page of this guide. Unlike non-workflow processes, users generally choose to scan a document first, then index the scanned document and route for approval.

Index the document. Scanned documents generally route to an indexer who enters any relevant document data into KwikTag. Upon clicking the submit button, the document and the related data is then routed to an approver.

Approve the document. Document approvers can log into KwikTag and view documents that have been assigned to them for approval. They can also choose to approve documents via email rather than logging into the KwikTag Web client.

ERP entry. Users of Microsoft Dynamics ERP systems (GP, NAV or AX) can leverage their KwikTag approval workflow process to facilitate data entry into their system of record for further processing. Steps for these processes are described in individual KwikTag guides for GP, NAV and AX.

THE WORK QUEUE LIST

Similar to the KwikTag documents page, the KwikTag Work Queue page presents a view of documents available to the user to be processed. For personnel assigned to indexing documents, this is where scanned documents will arrive to be indexed.

Default document views from this screen include:

Active documents I need to work: for indexers or approvers, this view displays any workflow documents assigned to the user that have not been processed.

All documents I have worked: for indexers and approvers, this view displays any documents that they have processed.

Documents I need to index: For indexers, this view displays documents they need to index.

Documents I need to approve: For approvers, this view displays documents they need to approve.

Documents I need to edit: For indexers, this view contains documents that have been routed for approval, but have been rejected and are in need of additional information.

Orphan documents I need to fix: This view is assigned to someone in the process (generally an indexer) who will address any documents that have been improperly routed; usually, because a KwikTag barcode was not attached, or the system was unable to read the barcode.



Figure 38

From any of these views, users can double-click on a document line to open the document, view the document and enter any appropriate index data associated with the document.

INDEXING A DOCUMENT

Data to be I indexed for a document may be configured by the KwikTag administrator according to the business rules and processes of your organization. Required index fields can be created so that documents cannot be submitted for approval unless these fields have been completed. As with non-workflow documents, these fields are bordered in red.

In addition to simple text or date fields, KwikTag also provides look-up fields for users who wish to leverage their existing Microsoft Dynamics ERP data to populate fields such as Vendor ID or G/L distribution codes. These fields are identified by a magnifying glass symbol next to the text field. Clicking on these fields results in the display of a pop-up window that includes data from the ERP system source.

kwiktag[.]

Welcome WillS | Logout | Preferences

Welcome WillS | Logout | Preferences

		(Previous	Return to Work	k Queue	Next 🕨
Site: KwikTag 💌 Document: Invoices		🖯 🗎 🄬 · 🌾		€ € 60% +	
Company ID Fabrikam, Inc. 🗸 🗸		Find			
Document Date: 04/26/2011		ndex date field			Date: 10/11/2011
Document Number:				Bill To Max Pro Fabrika 2320 Hr	ophet n neebboo Blod
Purchases Amount:			Required	Kansas 816-555 7630 C	City, KS 64108 -5555 Sustomer ID 3677650
Vendor ID:	a	Contractor		75751	
GL Distribution:	a 🗌	Vendor and G/L	*		100 100 10
		fields			
Comments:			Contraction of the second s		

Figure 39

USING VENDOR AND G/L LOOK-UP FIELDS

As described above, KwikTag provides look-up windows for Vendor ID and G/L distribution codes.

kwiktag[.]

	Select vendor from choices be	elow:	0
Site KurikTan	AUTOFINA0001	Auto Financing	C
Site: Kwikrag	BEAUMONT0001	Beaumont Construction	Click to select a Vendor
Document: Invoices	BERGERON0001	Bergeron Communications Sol.	code
	BLOOMING0001	Bloomington County	
Company ID	BURNETTT0001	Burnett Travel Associates	
Fabrikam, Inc.	BUSINESS MAG	Business Magazine	
Document Date:	BUSINESS0001	Business Equipment Center	Date 10/11/0014
04/26/2011	CAPITALP0001	Capital Printed Circuits	5408 1011/2011
Document Number:	CARLSONS0001	Carlson Specialties	reet Bill To Max Prophet Fabrikam
/5751	CENTRALC0001	Central Cellular, Inc.	ity, KS 64108 Kansas City, KS 64108
Purchases Amount:	CHICAGOC0001	Chicago City Tax Dept.	505 816-558-5535 astomer ID 3677650 Customer ID 3677650
000.00	CHICAGOR0001	Chicago Rent-All	K difference in the second second second
Vendor ID:	CIRCUITD0001	Circuit Distributing West	
	COMNETEN0001	Comnet Enterprises, Inc	S Click submit
GL Distribution:	COMPUTER0001	Computer Training Systems	100
	COMVEXIN0001	ComVex, Inc.	10
	CONSUMER MAG	Consumer Magazine	
Comments:	CONTINEN0001	Continental Connectors	
View System Fi	(<u> </u>		1
thew System Pi			



KwikTag G/L look-ups can be configured to provide default G/L distributions, as seen below. Users can edit credit/debit amounts, or edit the G/L type. To add additional G/L distribution codes, select the All G/L Codes link at the bottom of the screen.



Figure 41

Site: KwikTag Document: Invoices			´ ▲• - 🌍	1 /	1 💿 🖲 🐻 🗸	
		GL Distribution				C
Company ID Fabrikam, Inc. Document Date: 04/26/2011 Document Number: 75751		Purchases: 100 Trade Discount: Freight: Miscellaneous: Total: \$10	00.00 Vendor ID: Vendor Na	ime:	BE Choose G/L	. Туре
Purchases Amount:						
1000.00		Account	Description	Туре	Debit	Credit X
		100-6170-00	Repairs & Maintenance - A	PURCH	\$1000	\$0 X
	Q	000-2101-01	Accounts Payable - Canad	PURCH 👻	\$0	\$500 X
BEAUMONT0001			Accounts Payable	CASH	\$0	\$500 X
BEAUMONT0001		000-2100-00	ACCOUNTS Payable			

Figure 42

When multiple G/L codes have been selected, the KwikTag G/L code field will indicate the number of selected fields. To view the details for each of the selected G/L codes, mouse over the field.

Site: KwikTag Document: Invoices	🔒 🗎 🄬 - 🌍		ی کی 🕞 🐑	₩
Company ID Fabrikam Inc.	Find			
Document Date: 04/26/2011	Mouse over the G/L			Date: 10/11/2011
Document Number:	distribution field to	Ship To Max Prophet Fabrikan	Bill To Max Pr Februa	rophet In
75751		Kansas City,	KS 64108 Kansas	Oughton Blvd City, KS 64108
Purchases Amount:	view details	816-555-5555 Custo	816-55 mar ID 3677650	-5555 Customer ID 3672650
1000.00				
Vendor ID:	10/11/2011	14710	75751	
BEAUMONT0001	ENTITIES AND ADDRESS	No. 1 and the American State Property of		
				100
3 order relacted	Click Submi	it to		10
5 coues selected	complete t	haindex		
C	complete t		Martine and the second states of the	
	aintenance		1	
\$1000.00, 100-6170-00, Repairs & Ma	process			

Figure 43

To complete the index process, the user simply clicks the Submit button. The document is then removed from the Indexer's work queue and routed to the work queue of the appropriate approver or group of approvers.

	Previous	Return to W	der Queue	Next
Site: KwikTag				/
Document: Invoices	🛛 🖯 🖯 🔂 🖓 - 🛛 🍪	1 /1	🗩 🖲 🐻 - 🛛 😓	
our document has been indexed	Find			
Company ID:	1.			
Fabrikam, Inc.	Confirmention	-		
Document Date:	Confirmation	OT 713 102		
04/26/2011	document ind	ex		
Document Number:	docanter ind			
75751	Dennen			
Purchases Amount:	Decomone		A DEX CO	
1000.00	and the second			
Vendor ID:		Deturn to Morel	L Owene	Sate: 10/11/
BEAUMONT0001		Return to work	k Queue	
GL Distribution:		2100 Hours	Polytikan Thin March	
3 codes selected		Kansas Ci	ity, KS 64108 Kansas City	, KS 641
Comments:		616-555-55 Cu	stomer ID 3677650 Cusic	amer I
Beaumont Invoice for Approval	Provide State of the second	A CARL AND	C. 414	
Winne Contrary Fields	10/11/2011	14710		
Thew system Fields	University of the second s		Or click 'Nevt	' to view
	149275	Trailer-bitch assemblies	OF CHER NEXT	
	10000	TERMINE - FURTH INVESTIGATION		

ıg

REVIEWING AND APPROVING A DOCUMENT

Approvers in a KwikTag approval workflow process may rely on the KwikTag Web client to view a list of documents to be worked, or alternately, may approve documents via email. While email approval is convenient for mobile users, the KwikTag Web client provides the added benefit tracking documents through the approval process.

EMAIL APPROVAL

Approving KwikTag documents via email is a straight-forward process for approvers. Approval emails include the document as an attachment, with indexed data provided in the body of the email message. A link to approve the document, as well as a reject link is included. Clicking either of these links results in the launch of a simple Web page that confirms the approval/rejection.

To delegate approval via email, the approver simply forwards the email to an appropriate delegate.



Figures 45a and 45b

KWIKTAG WEB CLIENT REVIEW AND APPROVAL

To review and approve a document via the KwikTag Web client, approvers follow a process that is familiar to Indexers in the KwikTag approval workflow process. Approvers log into the same KwikTag Web client as Indexers, using their own unique login credentials.

kwiktag[,]

	Kwiki ag Administration
by Imagetag enterprise-wide Embedded Easy elegant Lowest TCO Simple innovative complete	Username: WillSApprover Password:
i Imagetag	© 2011 ImageTag, Incorporated

Figure 46

Approvers are presented with the same Work Queue List as Indexers, with an immediate view of documents they need to work.





Once an Approver opens a document, they are presented with four options:

- 2. Approve the document (optionally, the Approver may add workflow comments to the document)
- 3. **Reject** the document (the Approver is *required* to enter comments for a rejected document)
- 4. **Delegate** the document (route to an alternate Approver or group of Approvers)
- 5. Cancel and return to the Work Queue

Document: Invoices		🔬 • 🌄	🔶 🔶 🚺	/1	60%	-	
Company ID:	Find	•					
Fabrikam, Inc.							
Document Date:	the second se		×	and the second		AL CONSIGN	
04/26/2011			the state of the s		23 Anystreet		
Document Number:	A	dvanced Off	ice Systems		Los Angeles, CA 90 Phone: 310 555 123	001 4 Earl 310 SEE 0836	
98632		arancea OII	ice oystems		E-Mail: Mark Smith	n Fax: 310-355-9876 1@408.com	
Purchases Amount:							
1000			la di				
Vendor ID:			CG3 7	13 101 1 / 1 mm			~
ADVANCED0001						Tnx	INICA
GL Distribution:						111	VILL
3 codes selected	Add Co	omments	p To:	Invo	ice No.:	MS-972635	05
Comments:			Michaels				
AOS Invoice Approval				Cust	omer ID:	IMAGE000	I
orkflow Comments:	D 05/3	Click to A	Sales Rep.	FOB Destination	Ship Via FEDEX	Terms NET30	Tax ID 86-98273457
	Qui	0		Discount	Taxable	Unit Price	Total
View System Fields		256 SDRAM 5 315 DSTK-A	256MB SDRAM Stick	n/a	n/a	125.00	6250.00
		STA BALLAR	ver confide - Lining	678	n/a	10.00	50.00
Approve Reject							6
A REAL PROPERTY OF THE REAL PR							

Figure 48

Once a document is approved, the approver will see a confirmation message on the screen, at the top of the index data section.







DELEGATING APPROVAL TO ANOTHER USER

Clicking the Delegate button within the KwikTag Web client produces a pop-up window with a pre-configured list of alternate approvers, or groups of approvers. The follow screens illustrate this process:



Figure 50



Figure 51



kwiktag[.]

Welcome WillSApprover | Logout | Preterences

Site: KwikTag Document: Invoices		• 🚳 🔶 🗍	/1 🖲 🖲 🐻 🗸	
This action was delegated	Find			
Company ID:				
Participation in the second se	Delegate	The second		and the second
04/26/2011	confirmation		327 Pulaski Dr Chicano, IL 60652	
Document Number:	commution	ent-All	Filone: 7/3-555-1254 Fax: 7/3-555-9876	
87642346			Lonane, while appropriate control	
Purchases Amount				
5600	CR^{2}			
Vendor ID:		/		
GL Distribution:				
		kwiktag =	033 713 100	
Comments:			Drice One	10
Chicago Rent All Approval			In Frice Quoi	Le
Workflow Comments:	Bill To: Will Gagi Fabrikam, Inc.	Ship To: Will Sough Fabriliam, Inc.	Quote No.: 87642346	- 1
		an ar an early a the s hare	Customer ID: IMAGE0007	- 1

Figure 52

WORKFLOW TRACKING

Approvers can track documents through the KwikTag approval process through the "My Lists" view within the Documents tab. Workflow tracking views provide a quick, comprehensive view of documents pending approval, approved or rejected.

As described elsewhere in this document, the Export icon in the upper right hand corner of this screen allows users to export document data to Excel for additional reporting and analysis.



Figure 53

WORKFLOW STATUS



In addition to a summary Workflow Tracking list view, KwikTag also offers a Workflow status summary for each individual document, displaying the date, time and result of each step in the routing and approval process. To access the Workflow status, select the document in the list, then click the Workflow status summary icon.

The following image illustrates the Workflow status display, showing details for each step of the process as the document was routed for approval.

orkflow	Status				>
Action	Status	User	Comments	Date	
Tag	Completed	Reviewers	David, please review and approve.	4/26/2011 10:26:24 AM	
pproval	New	DaviddApprover	David, please review and approve.	4/26/2011 10:39:33 AM	
pproval	Delegate	Approvers	David, please review and approve.	4/26/2011 10:39:33 AM	

Figure 54

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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