kwiktag®
by Imagetag

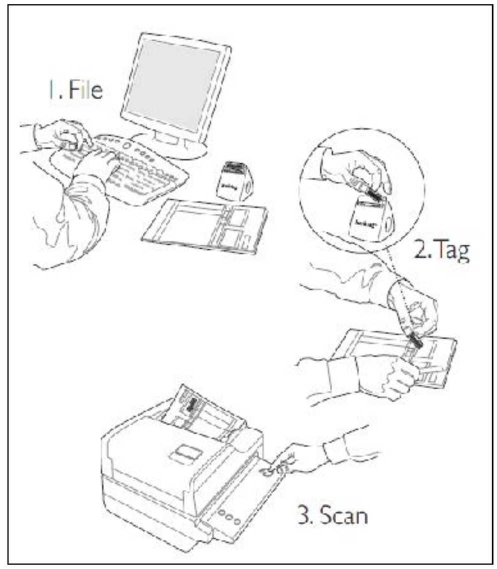
web client user guide

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.

CONTENTS

GETTING STARTED

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.

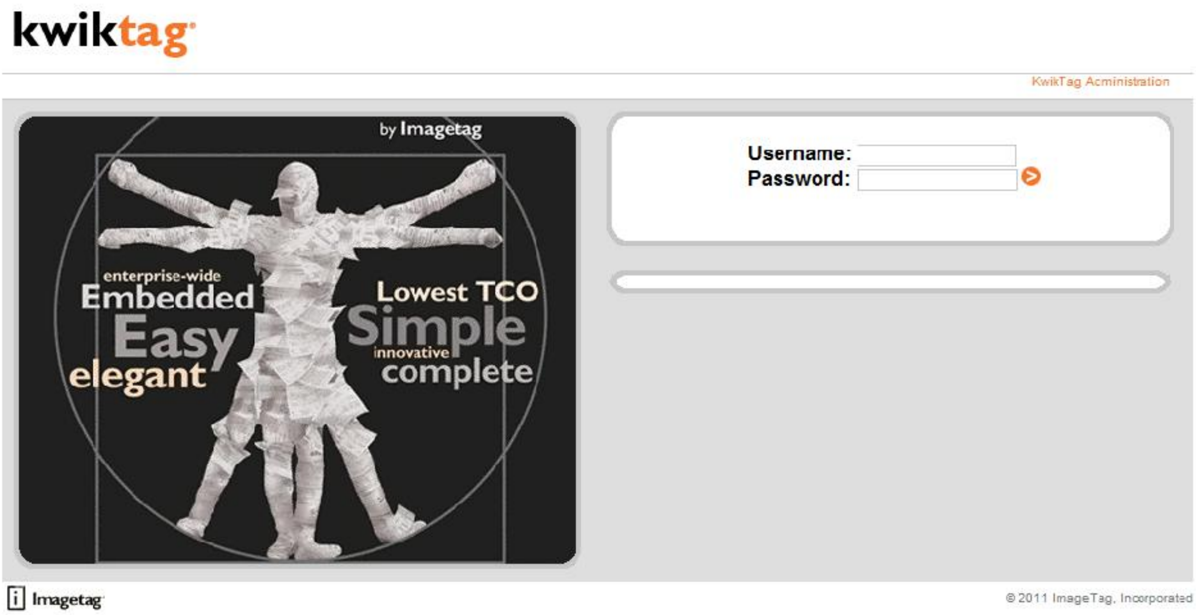


Figure 1: KwikTag Login Page

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.

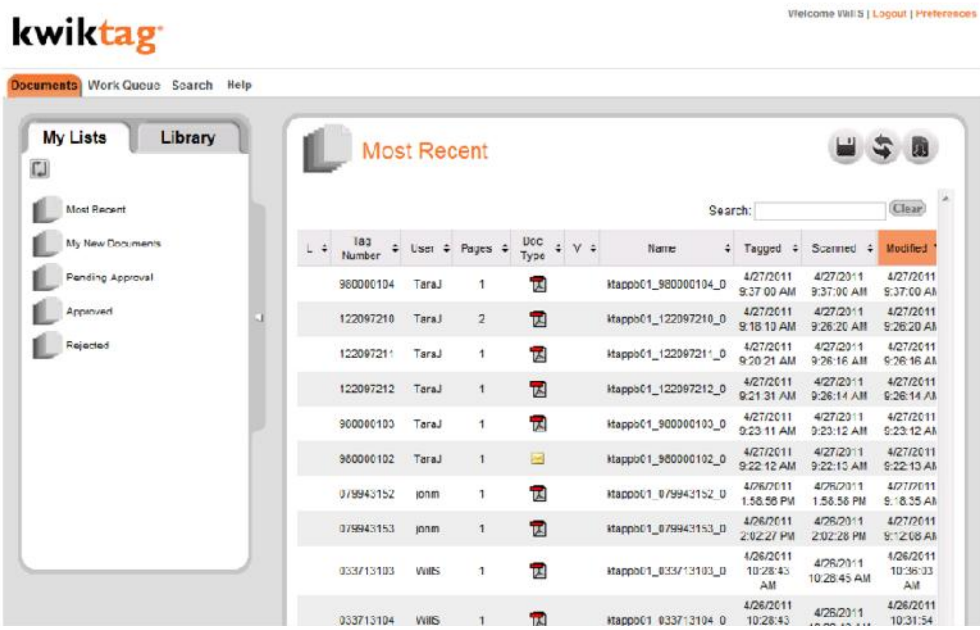


Figure 2a: Landing Page – Documents

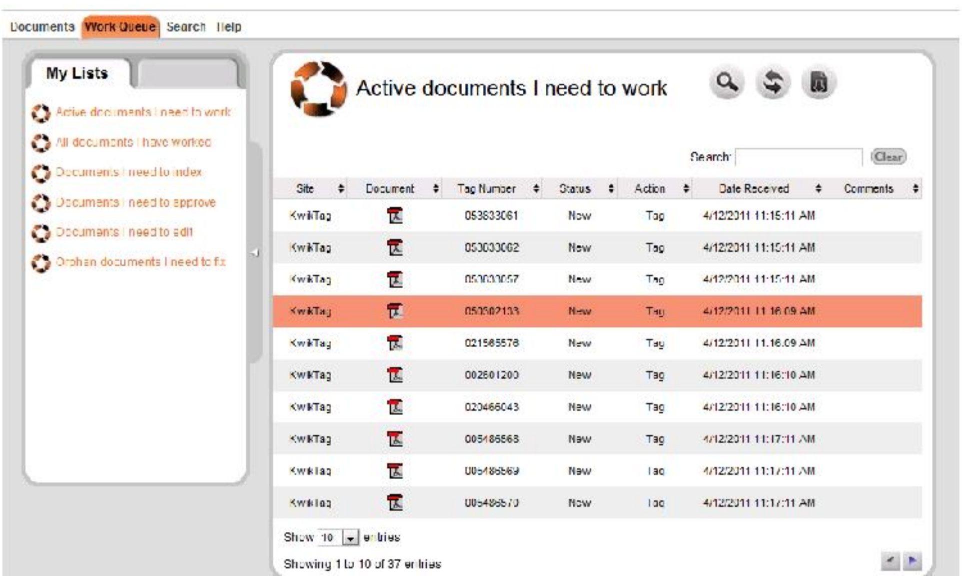


Figure 2b: Landing Page – Work Queue

PREFERENCES: SETTING DEFAULT PAGES AND REGISTERING KWIKTAG BAR CODE LABELS

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

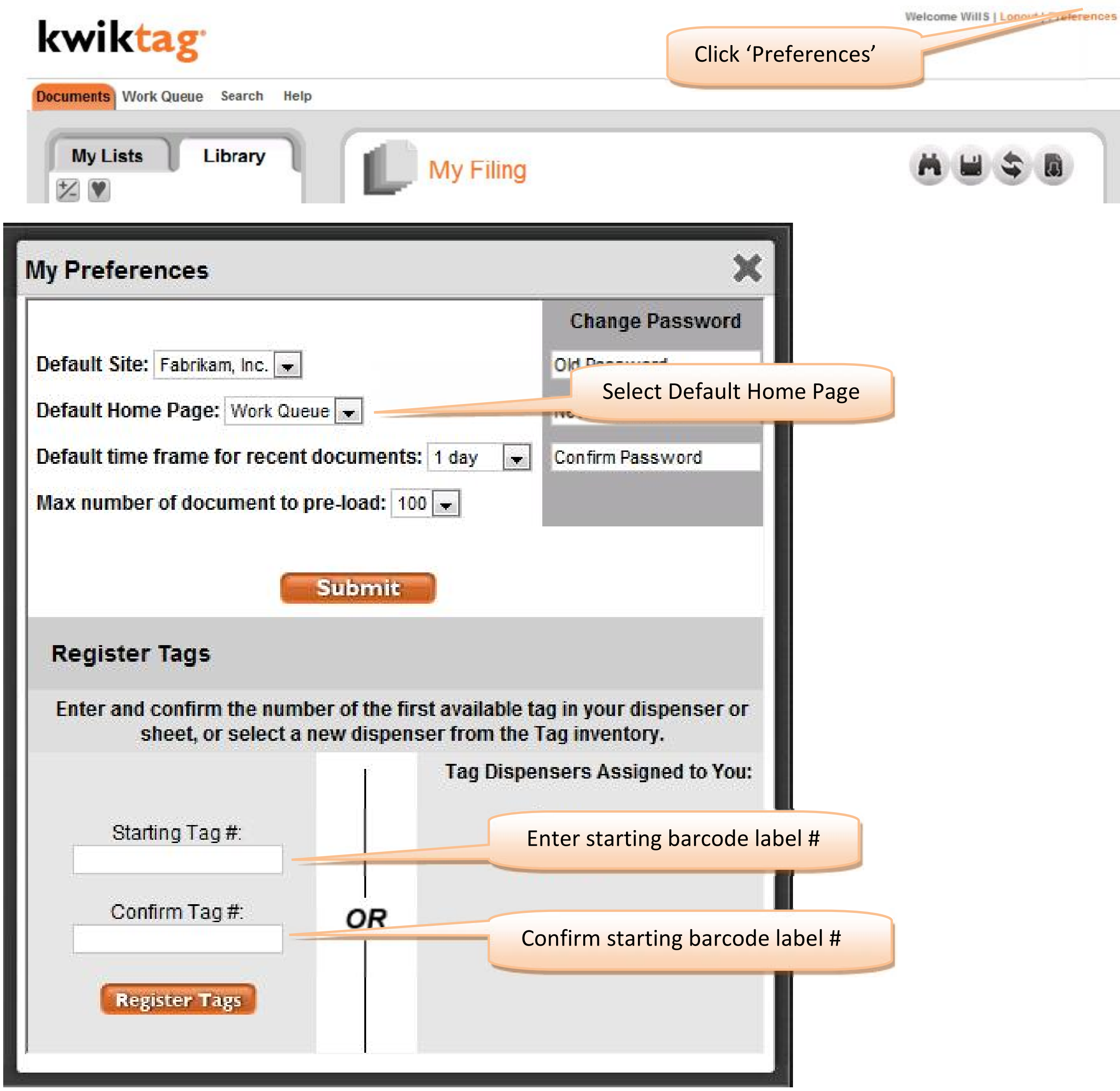


Figure 3: Preference Dialog Box

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.

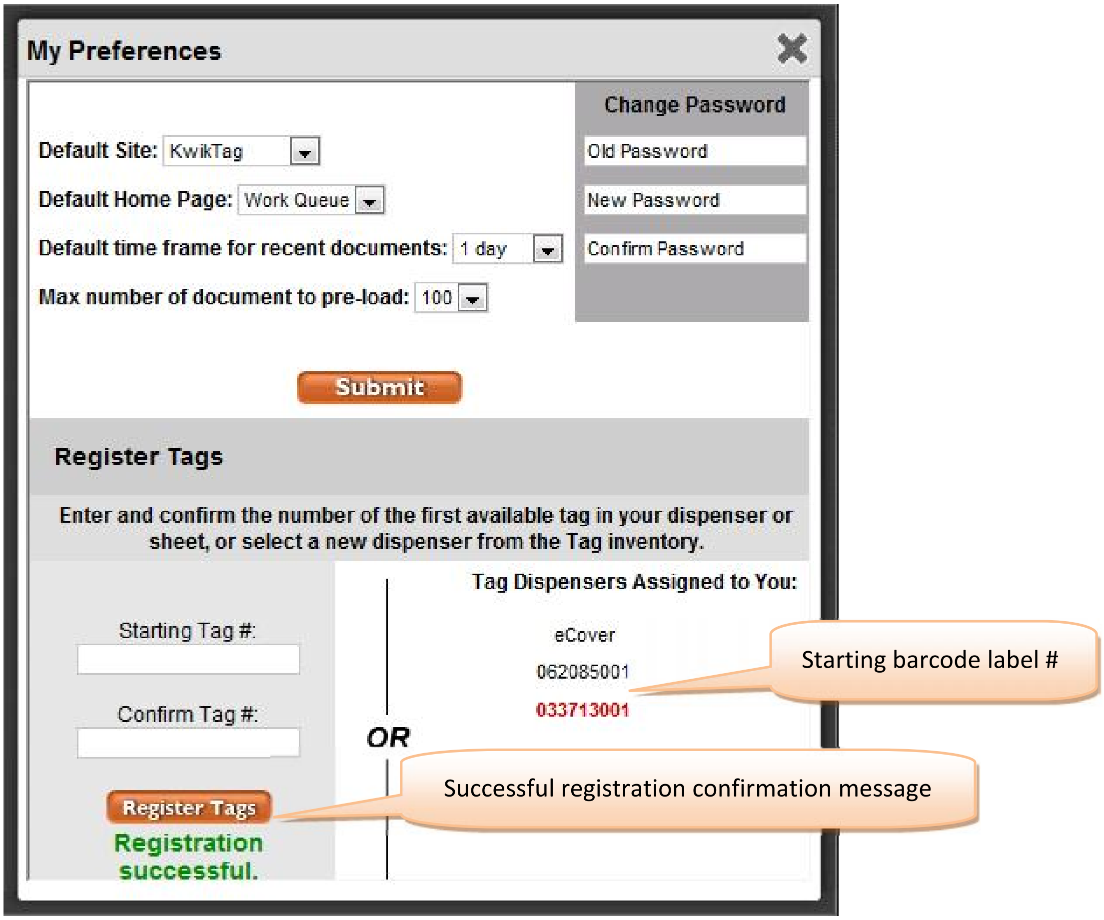


Figure 4: Registration Successful

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

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

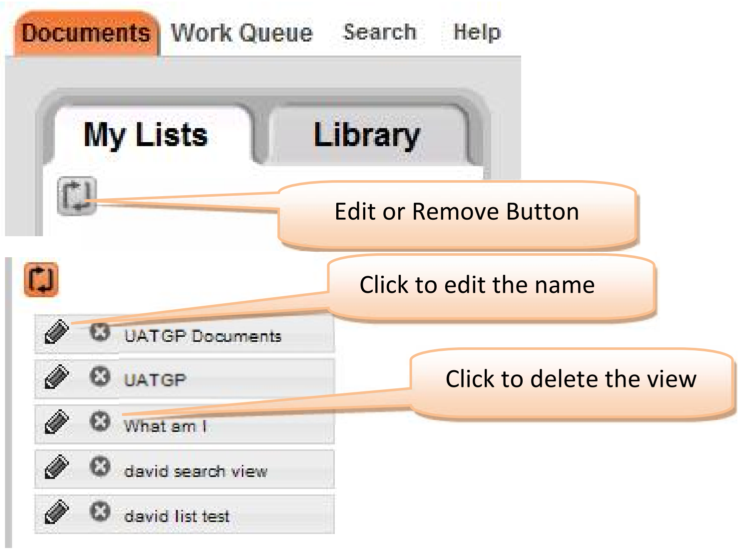


Figure 6

LIBRARY TAB

Default Folders

There are two default folders within the Library tab:

1. *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.

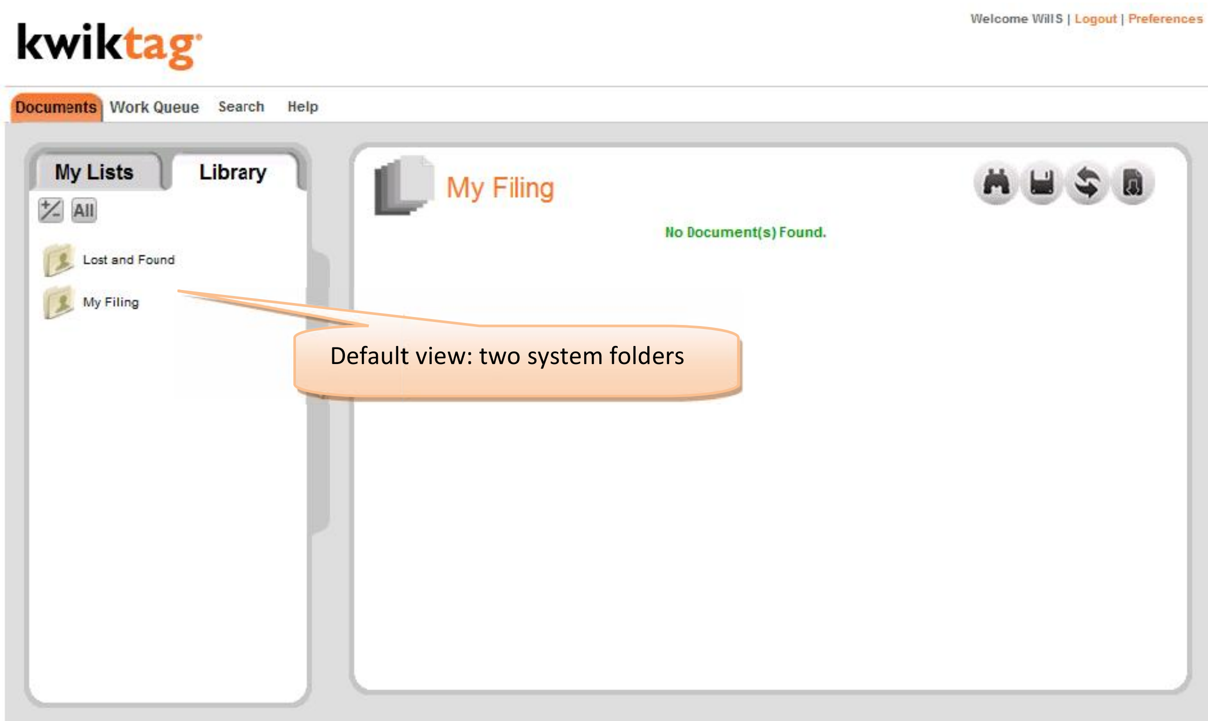


Figure 7: Library Tab - Default

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.

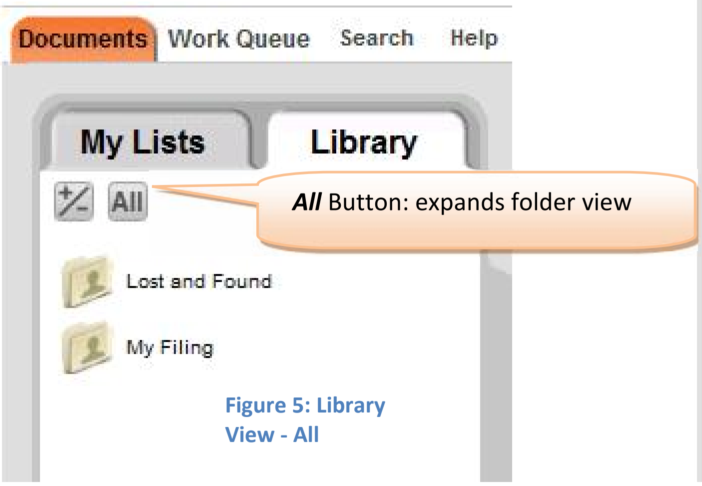


Figure 8a

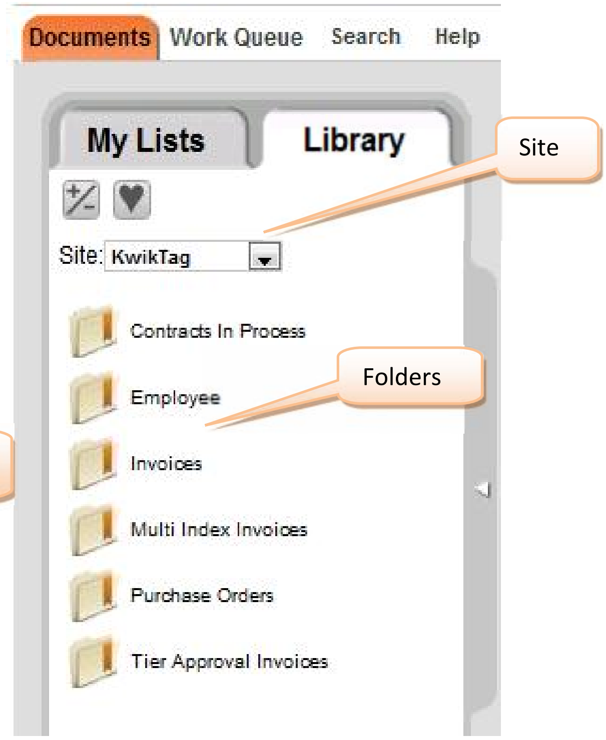


Figure 8b

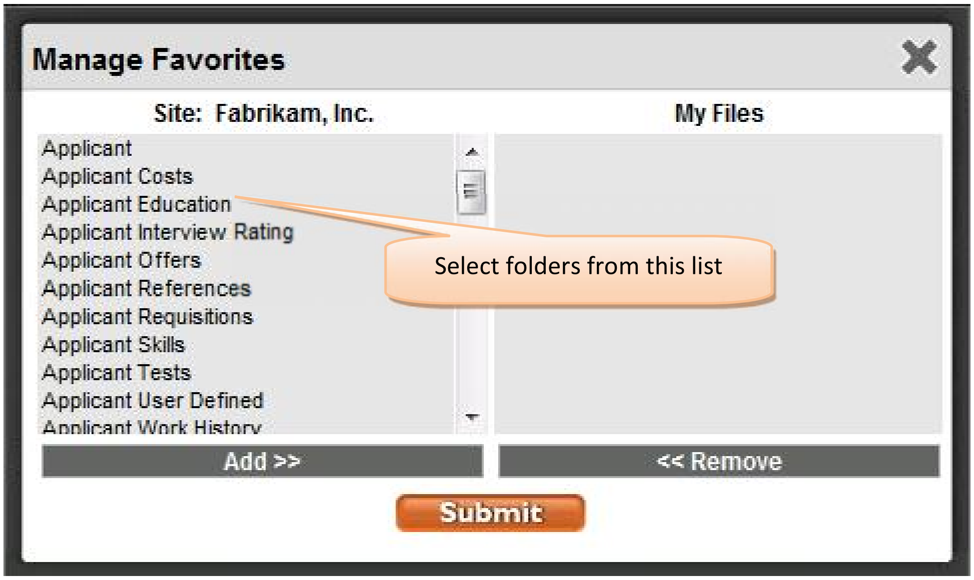
FAVORITES

'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
3. **Click** on the *+/-* Button – another window will open listing the folders available to you from the Site that you selected

Figure 9a and Figure 9b (below)



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 >>*'

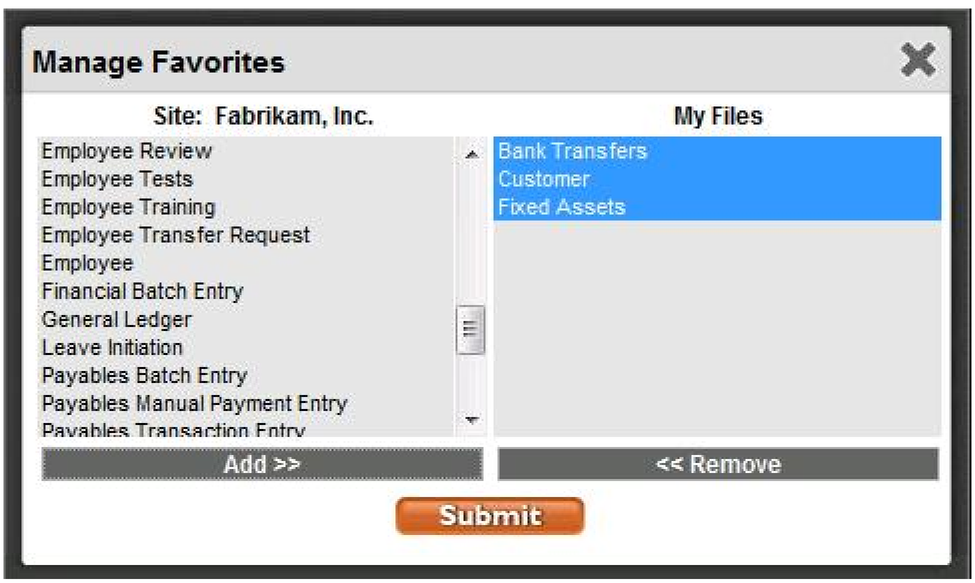


Figure 10

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.

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):

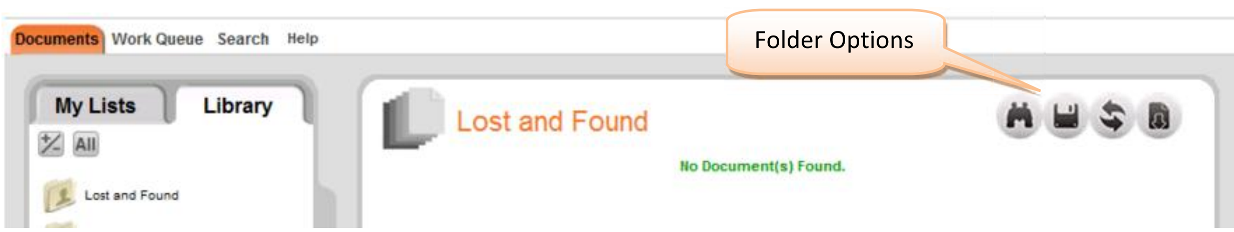


Figure 12: Option Links

1. 

Search
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

4. 

Export

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.

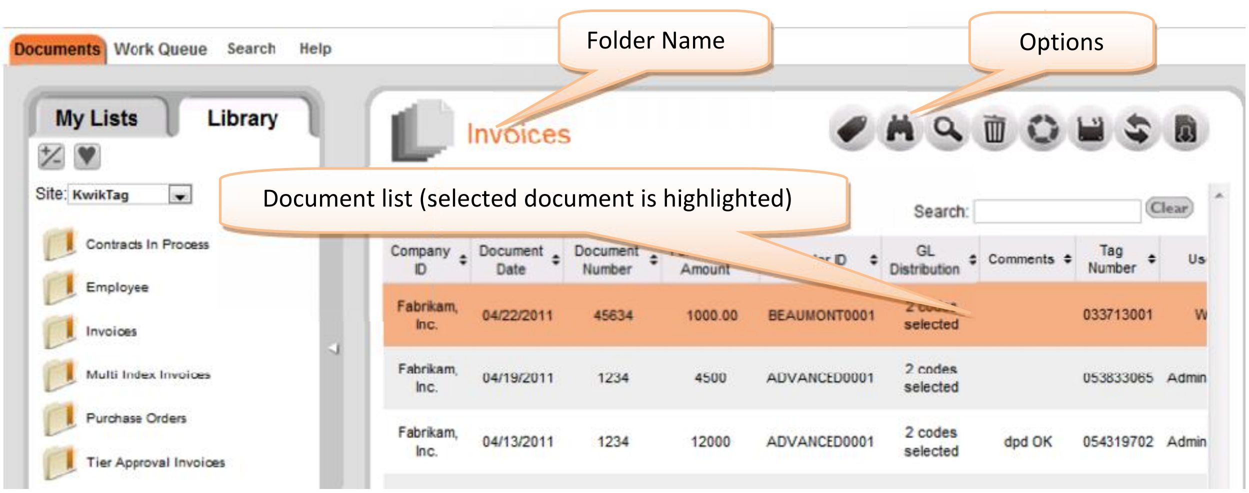


Figure 13

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

⇨ 'Workflow' will display the workflow status for the selected document

⇨ 'Search' will open a search screen

⇨ 'Save Lists' allows you to save a custom view of the displayed documents

⇨ 'Refresh' will refresh the page

⇨ As described under Folder options, the Export feature allows you to save the data in a document view to an Excel spreadsheet for reporting and analysis.

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:

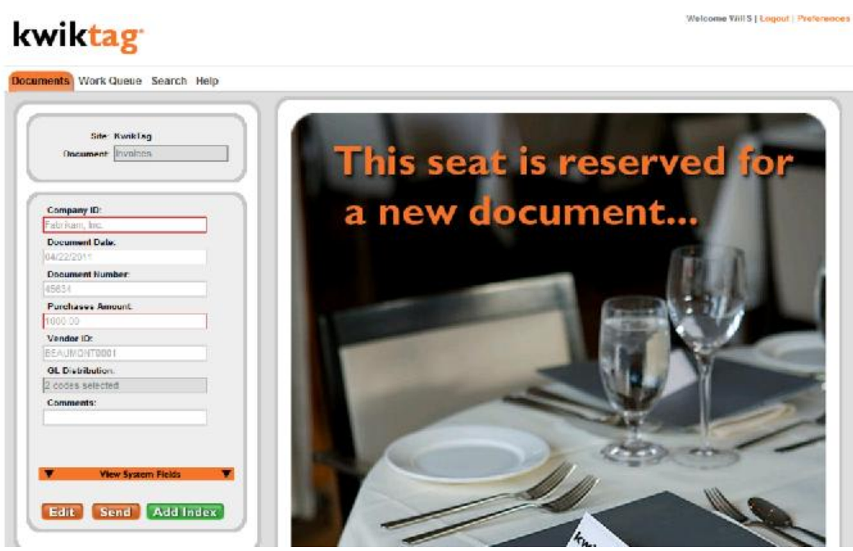


Figure 14

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

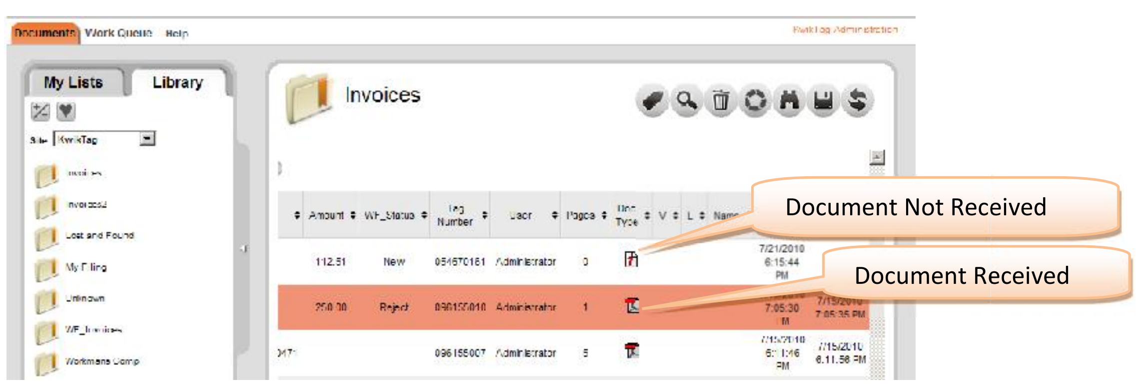


Figure 15

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

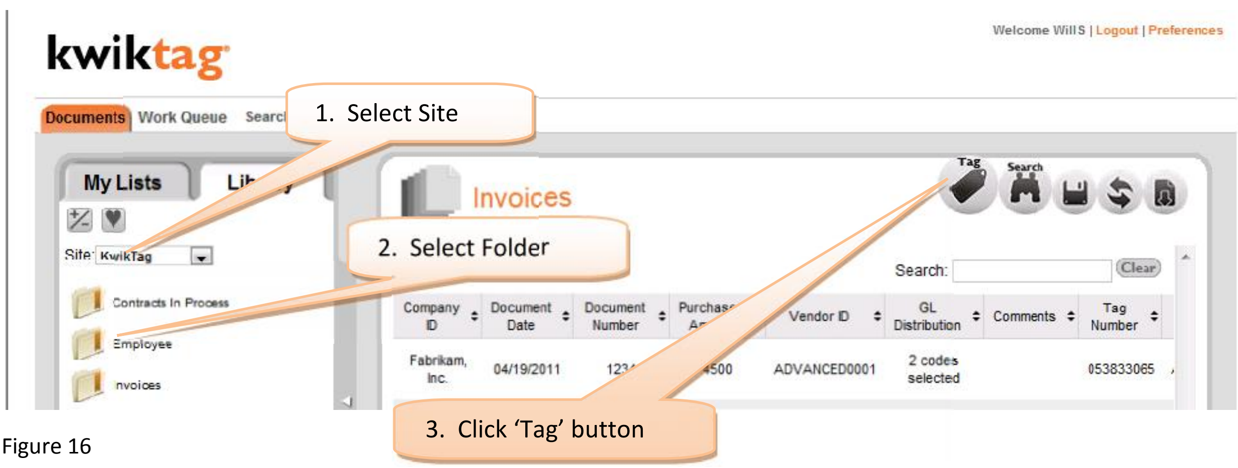


Figure 16

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.

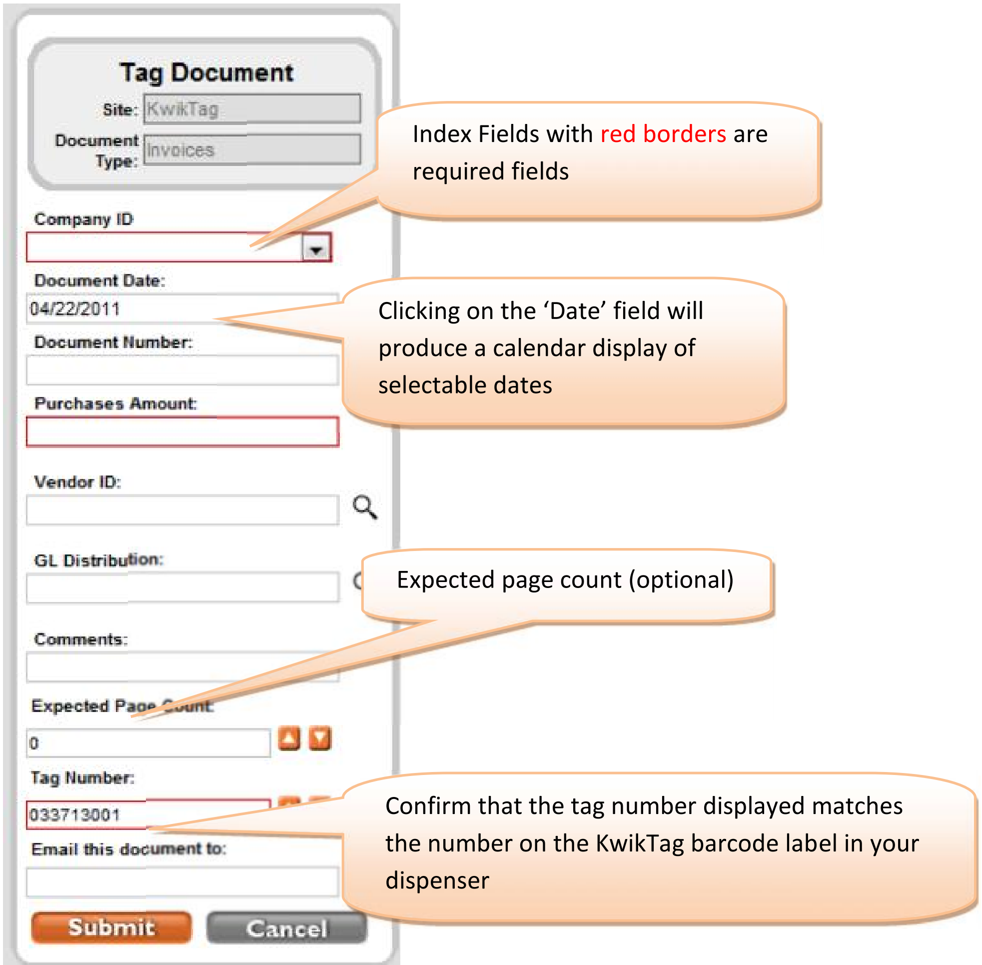
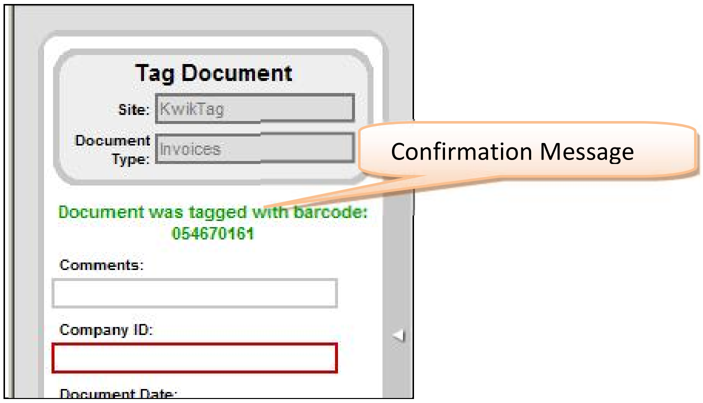


Figure 17: Indexing and Tagging a Document

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
Document was tagged with barcode: 054670161
Comments:
Company ID:
Document Date:
Figure 18

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.

Figure 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.

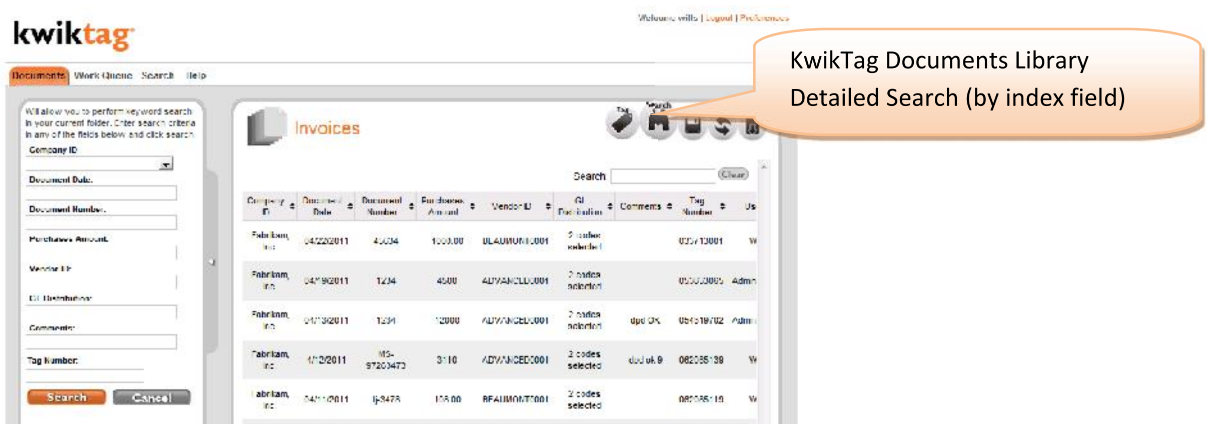


Figure 20

SEARCH FILTER

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

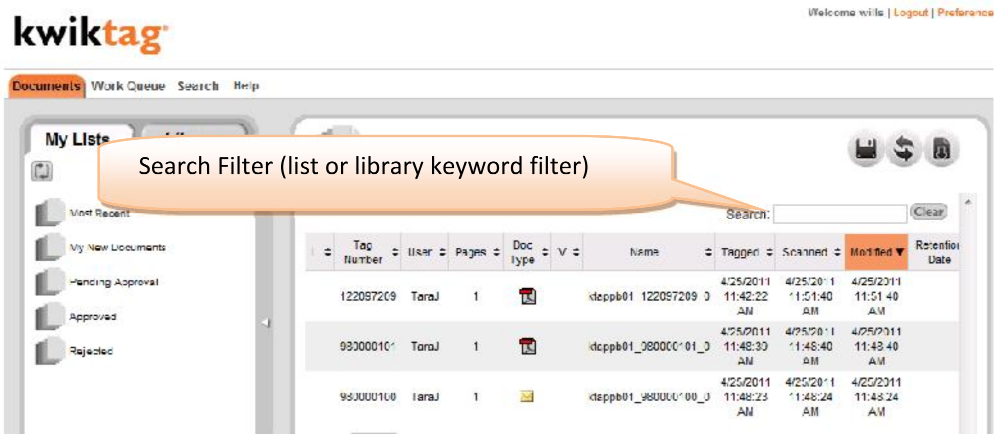


Figure 21

GLOBAL SEARCH

Figure 22

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

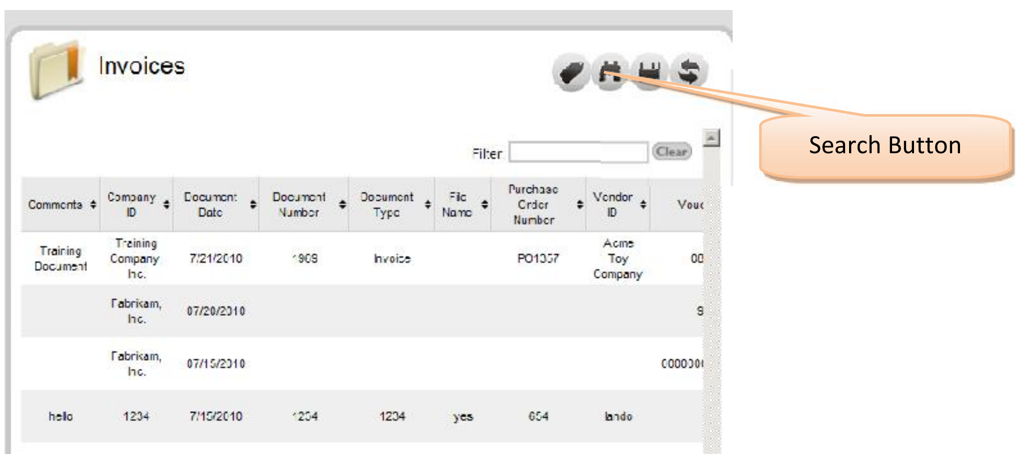


Figure 23

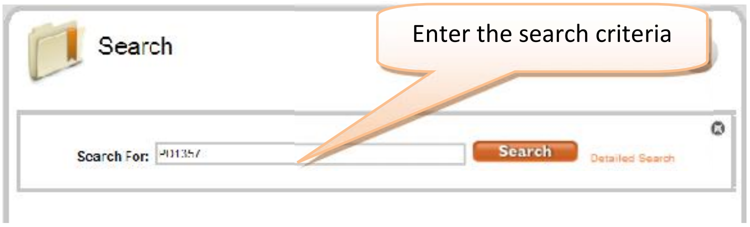


Figure 24

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

Figure 25

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

Figure 26

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:*'

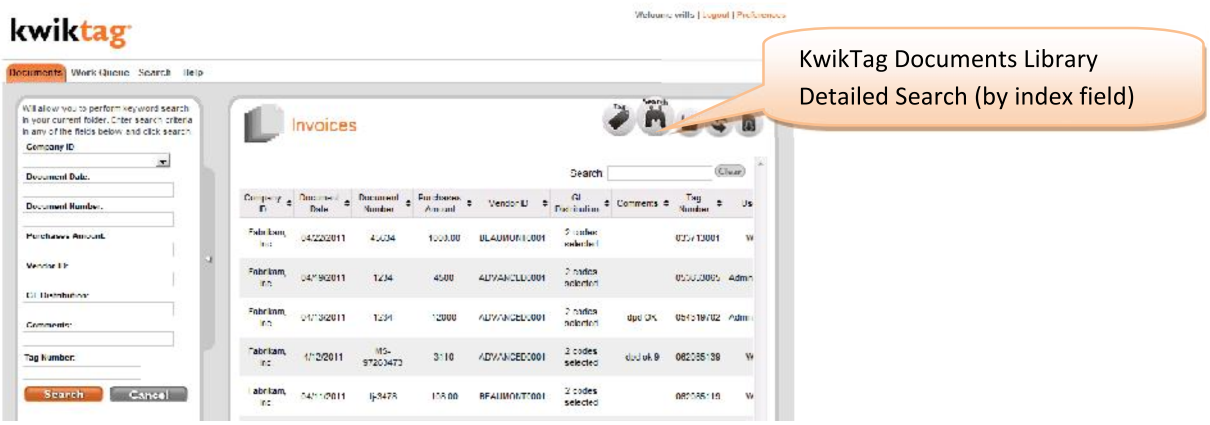


Figure 27

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

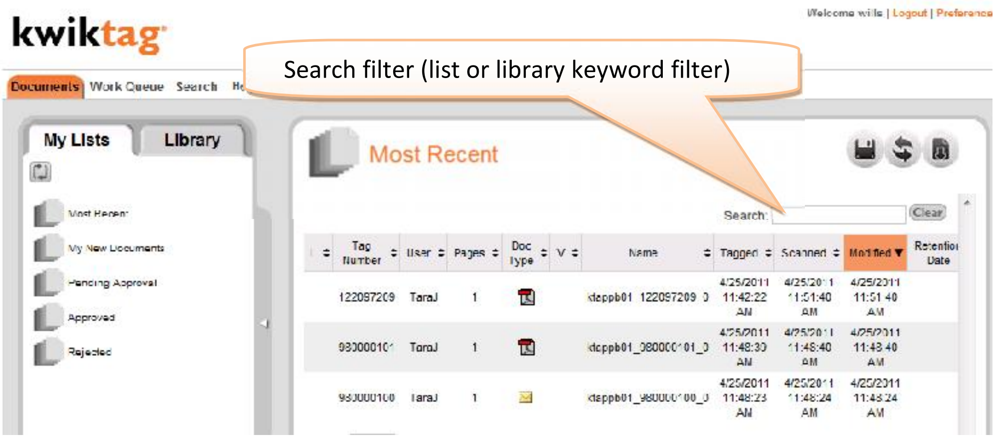


Figure 28

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

Figure 29

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

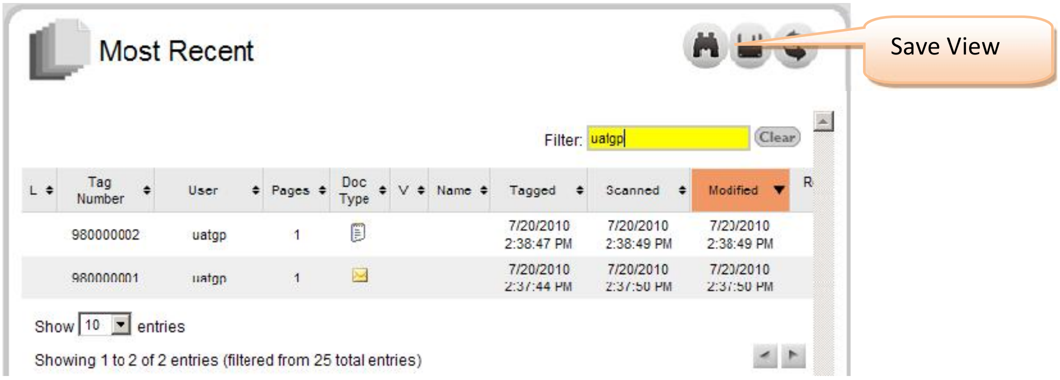


Figure 30

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

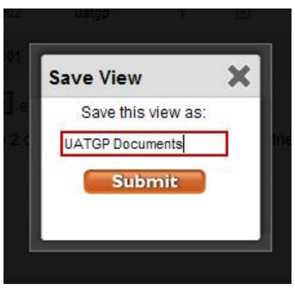


Figure 31

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**

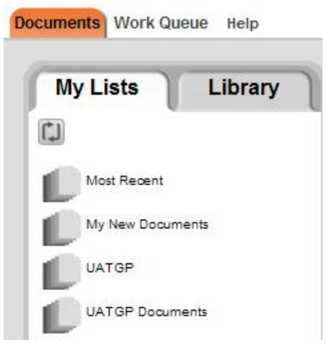


Figure 33

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.

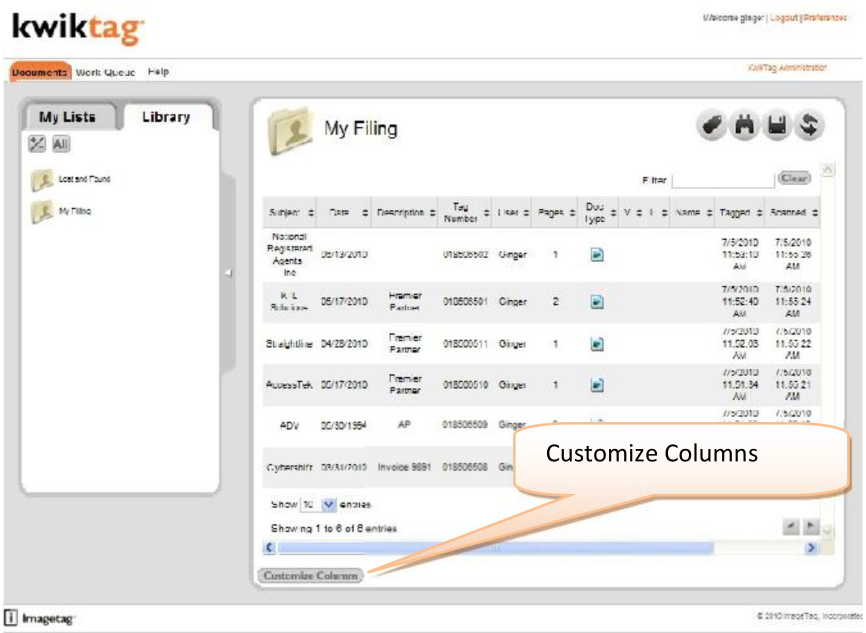


Figure 34

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

Figure 35

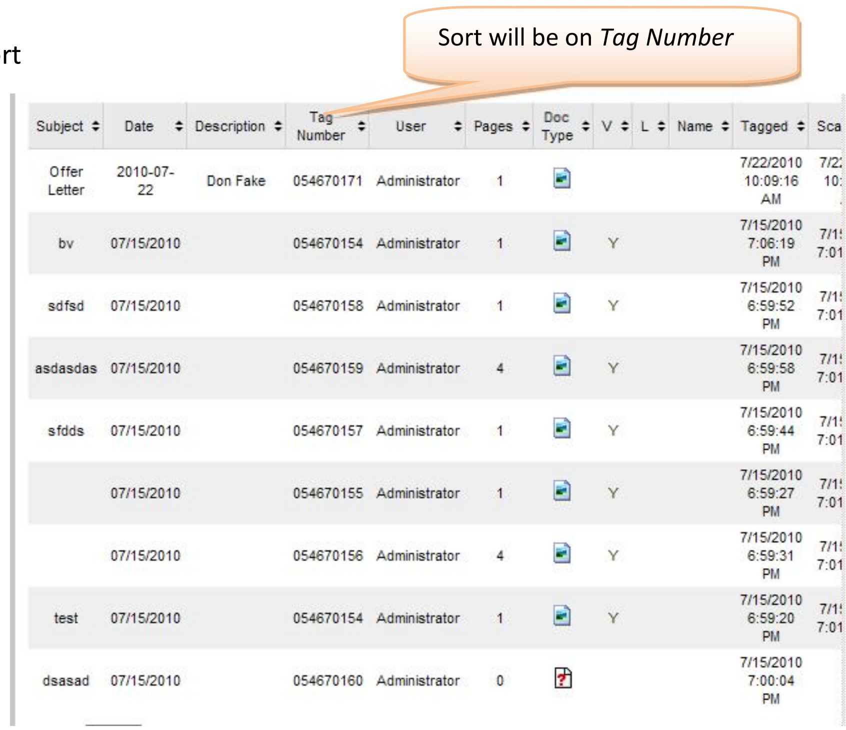
Select or De-select the Columns that you want to have displayed. **Click** *Submit*.

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

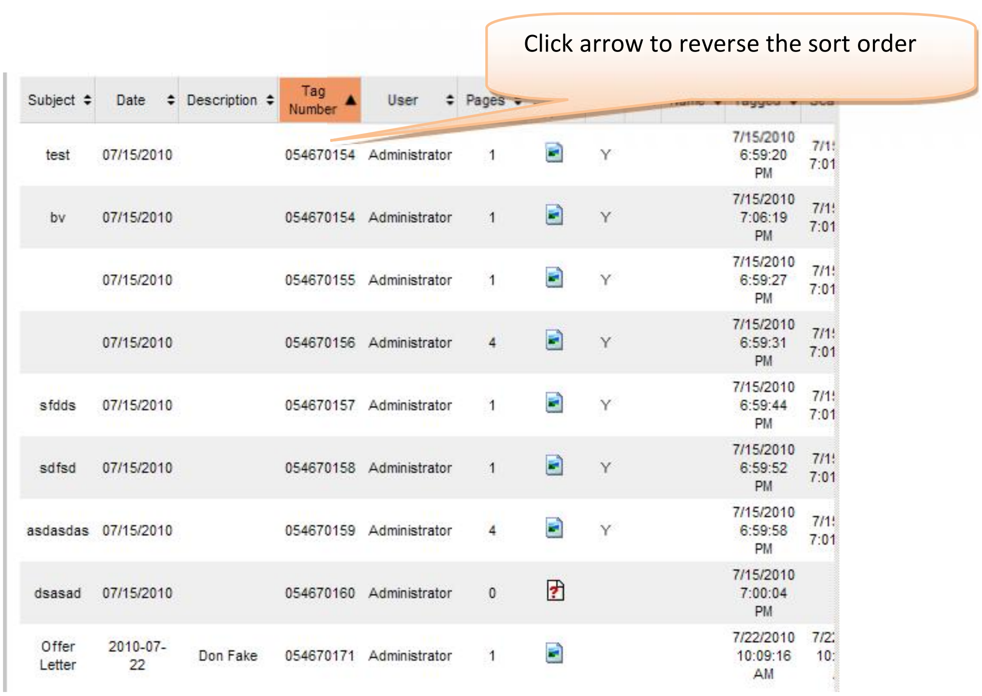
Before Sort



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					7/15/2010 7:00:04 PM	

Figure 36

After Sort



Subject	Date	Description	Tag Number	User	Pages	Doc Type	V	L	Name	Tagged	Sca
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		Y			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		Y			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.

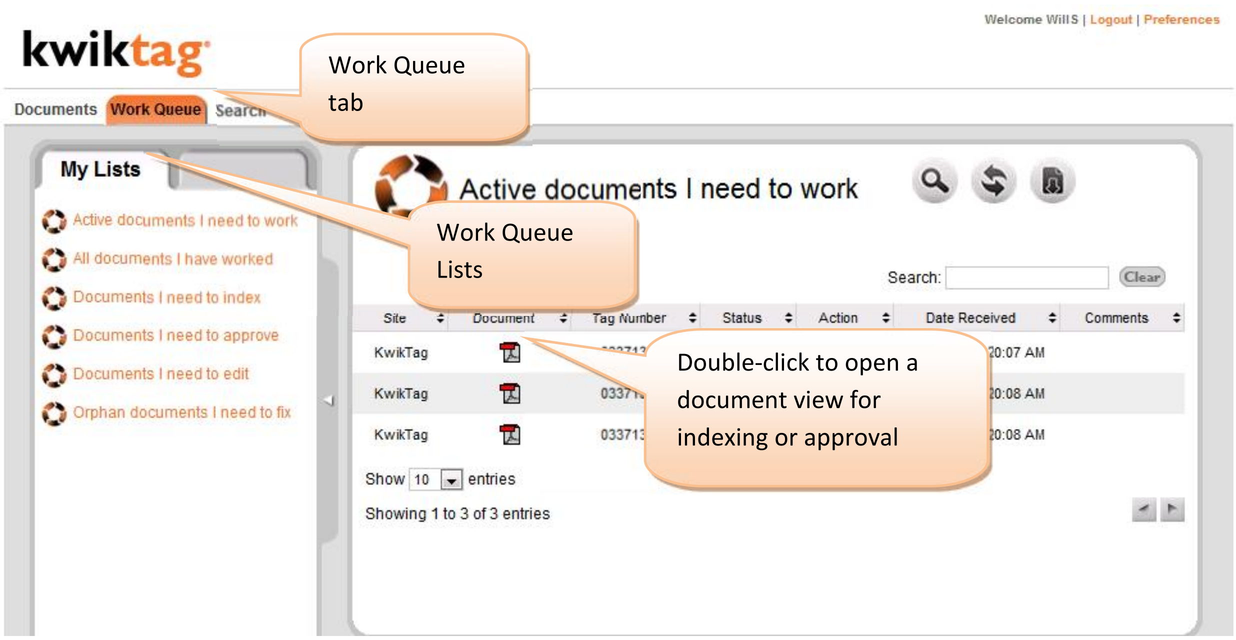


Figure 38

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.

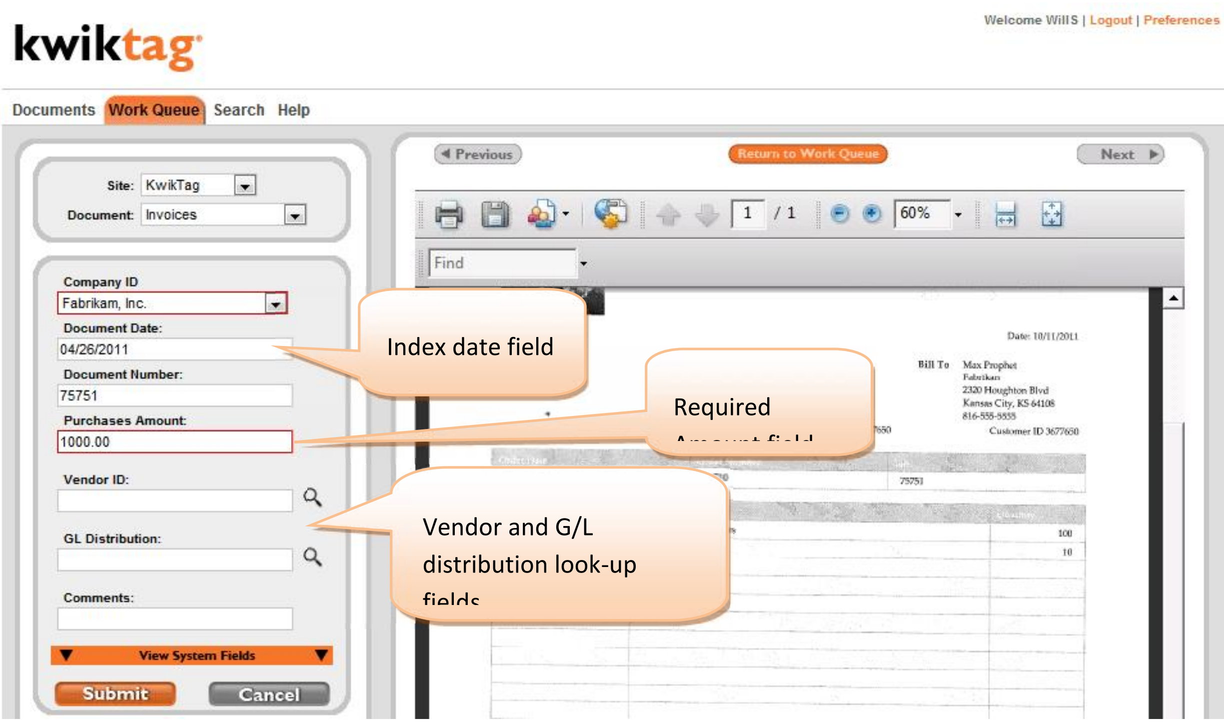


Figure 39

USING VENDOR AND G/L LOOK-UP FIELDS

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

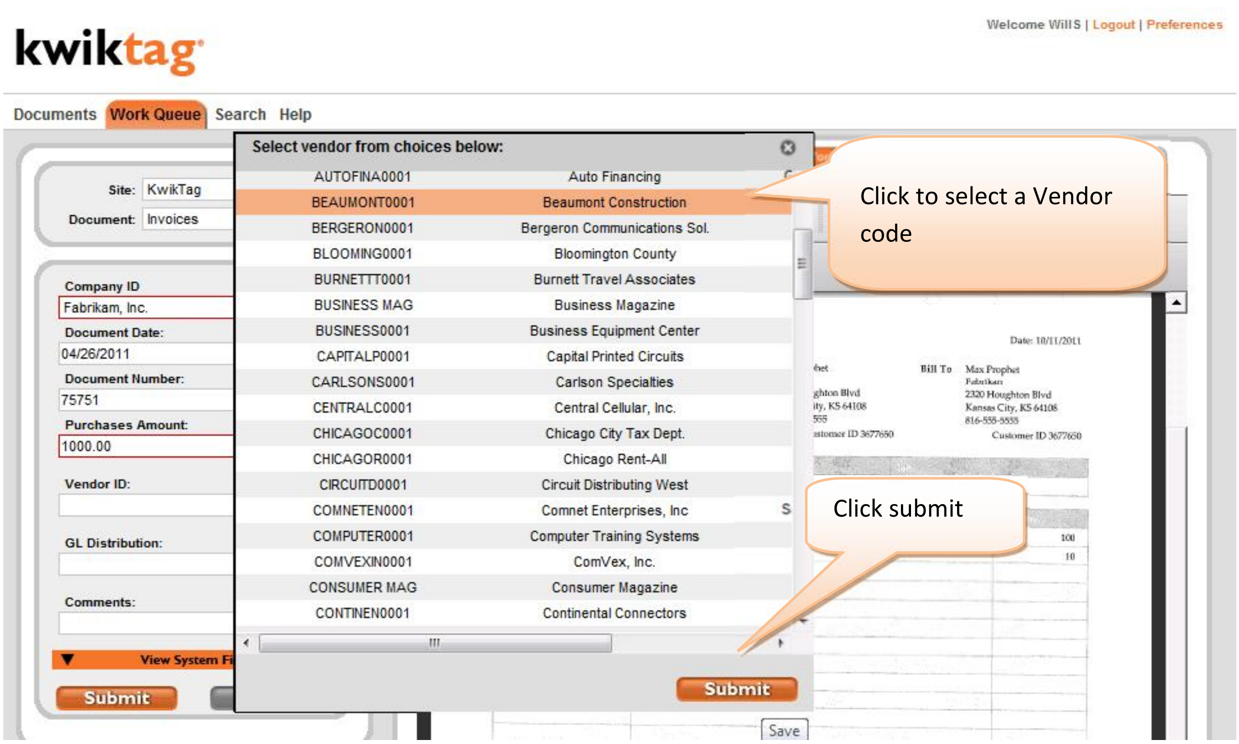


Figure 40

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.

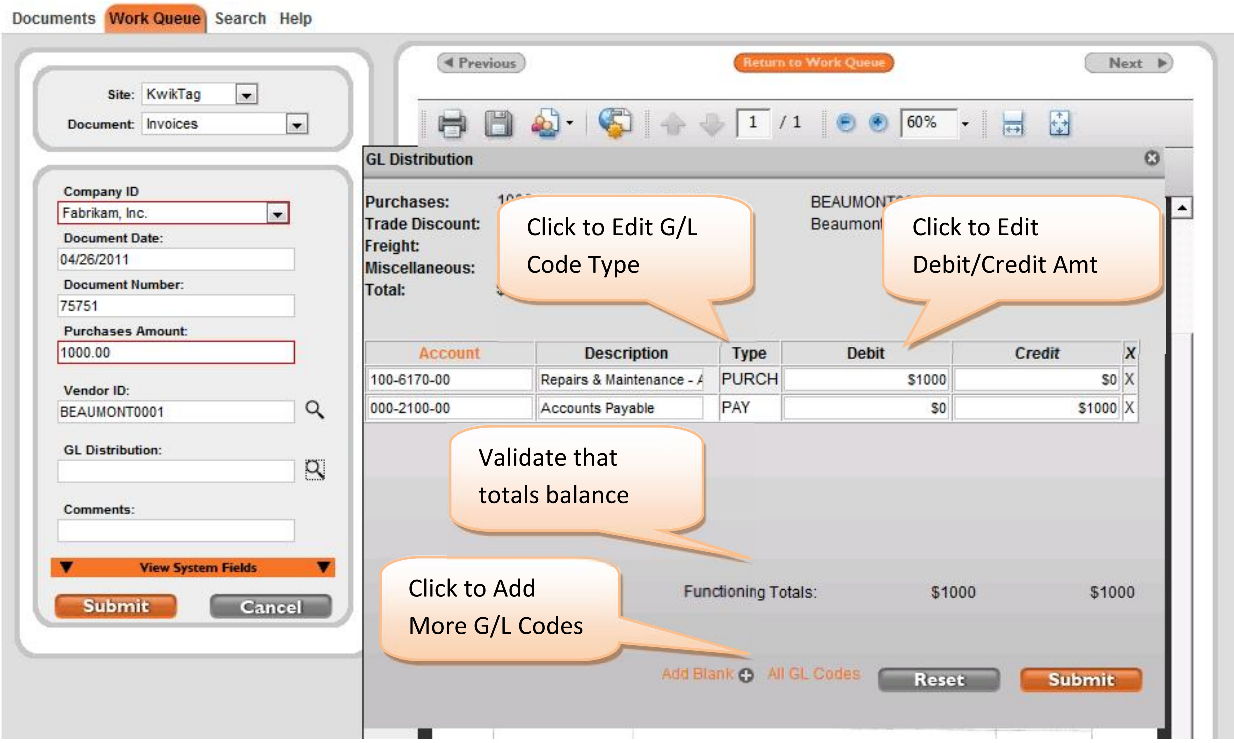


Figure 41

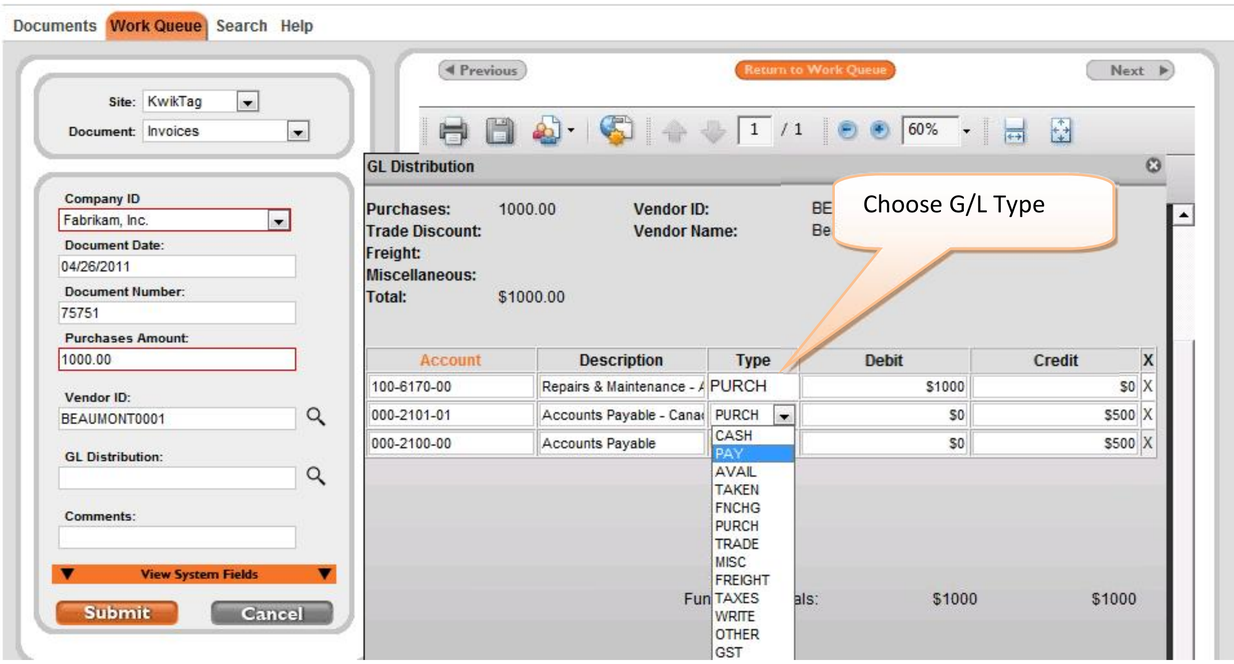


Figure 42

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.

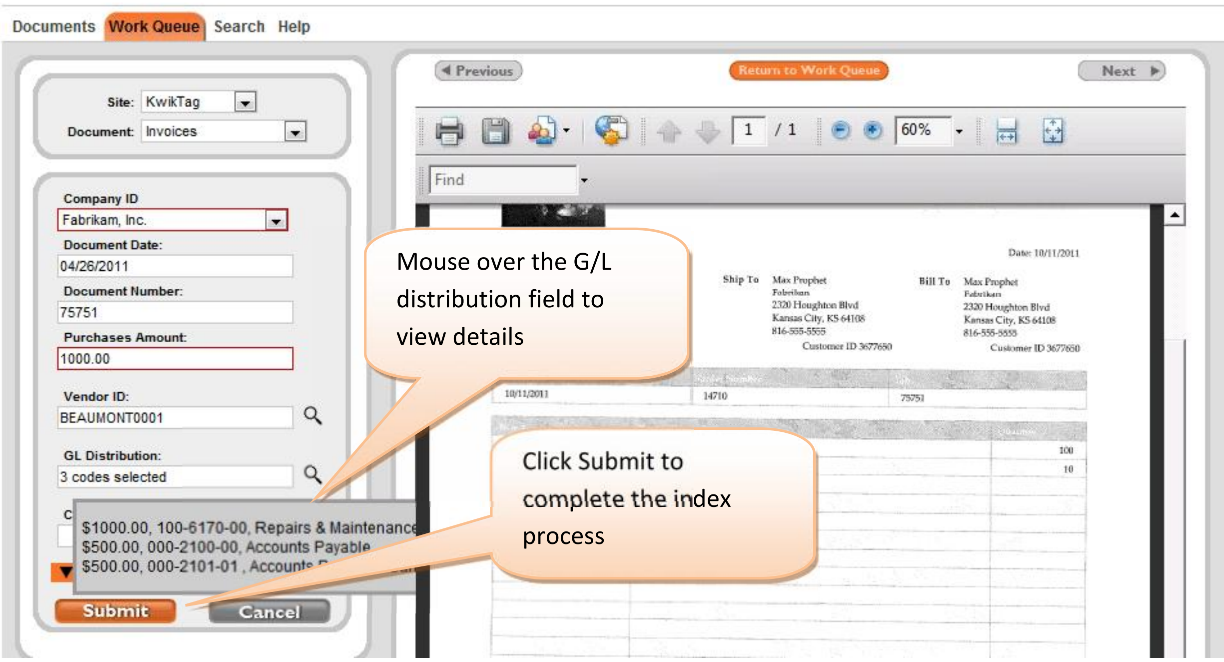


Figure 43

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.

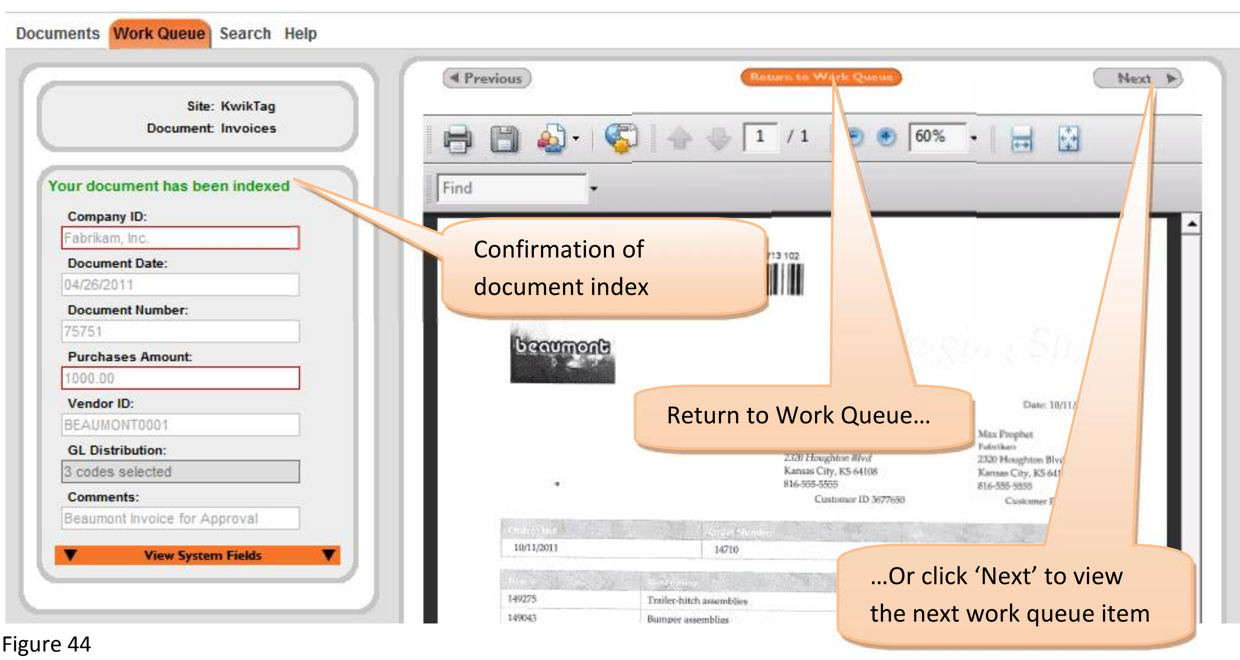


Figure 44

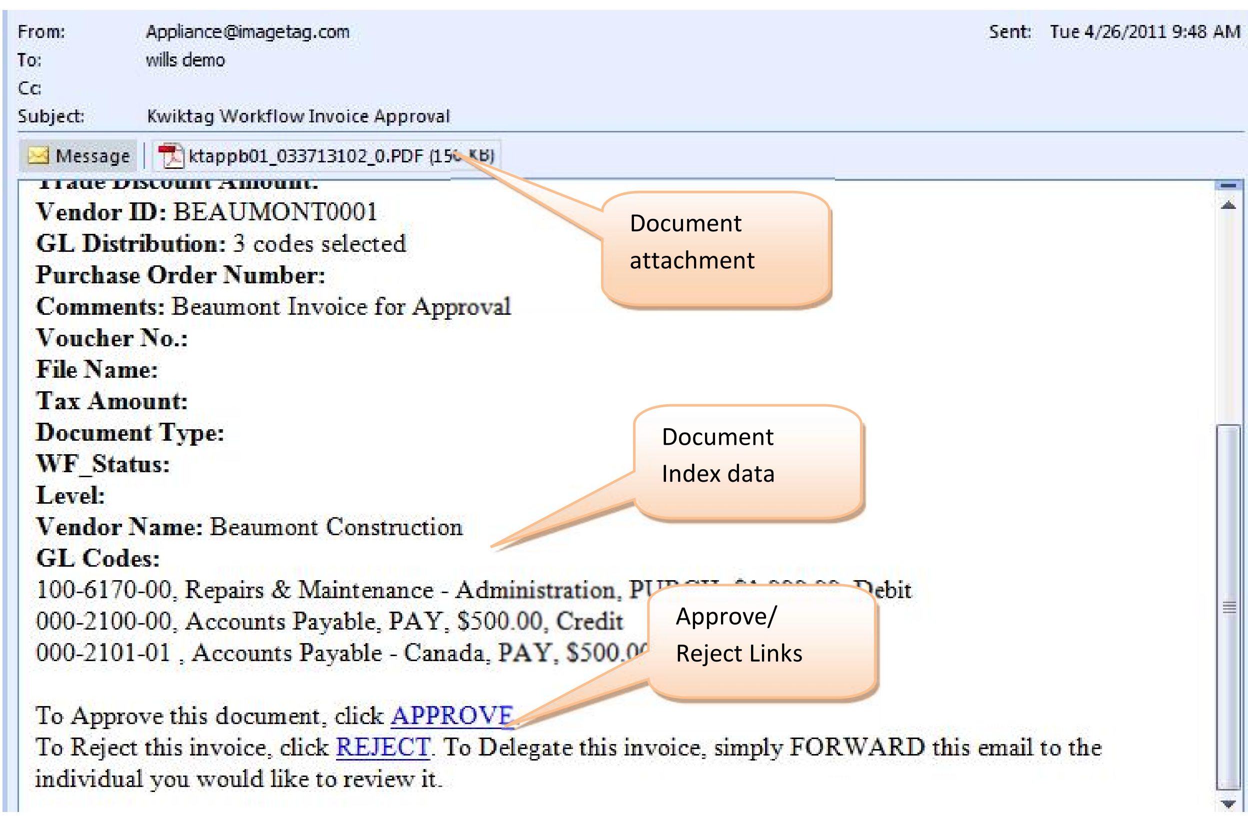
REVIEWING AND APPROVING A DOCUMENT

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.

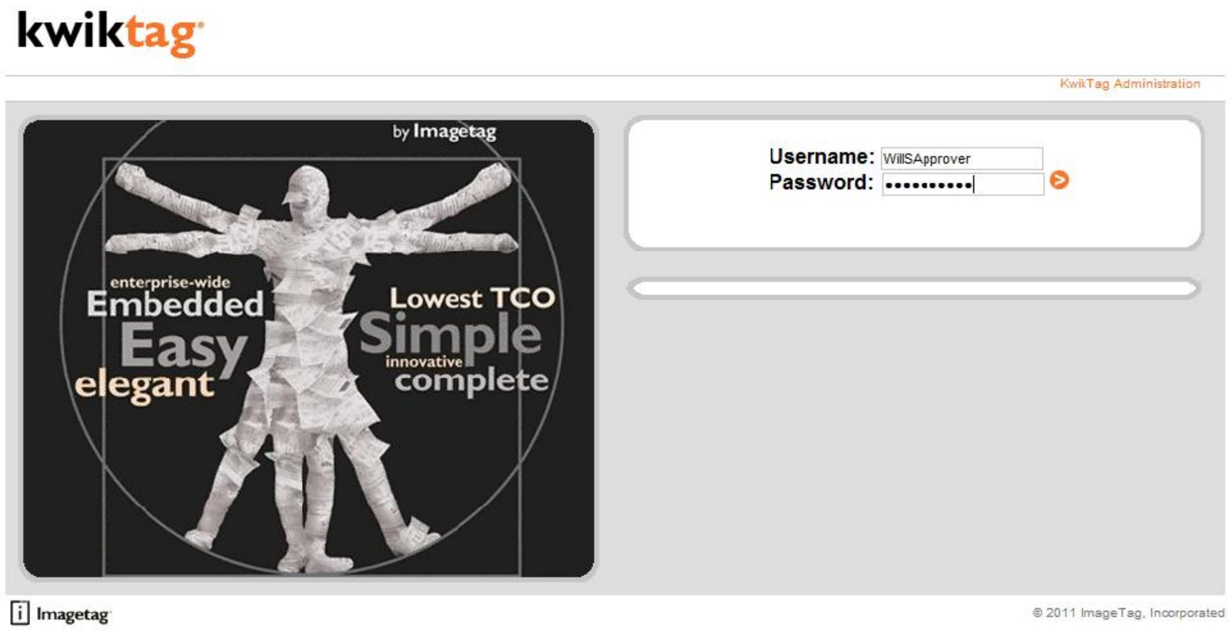


Figure 46

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

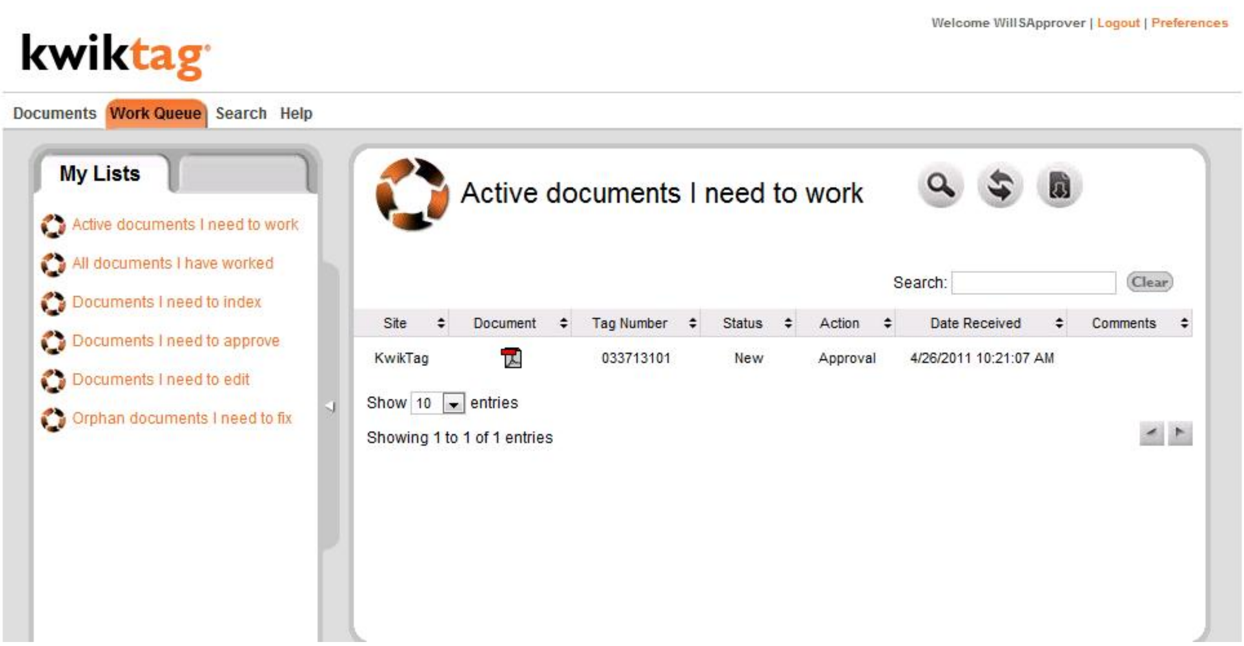


Figure 47

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

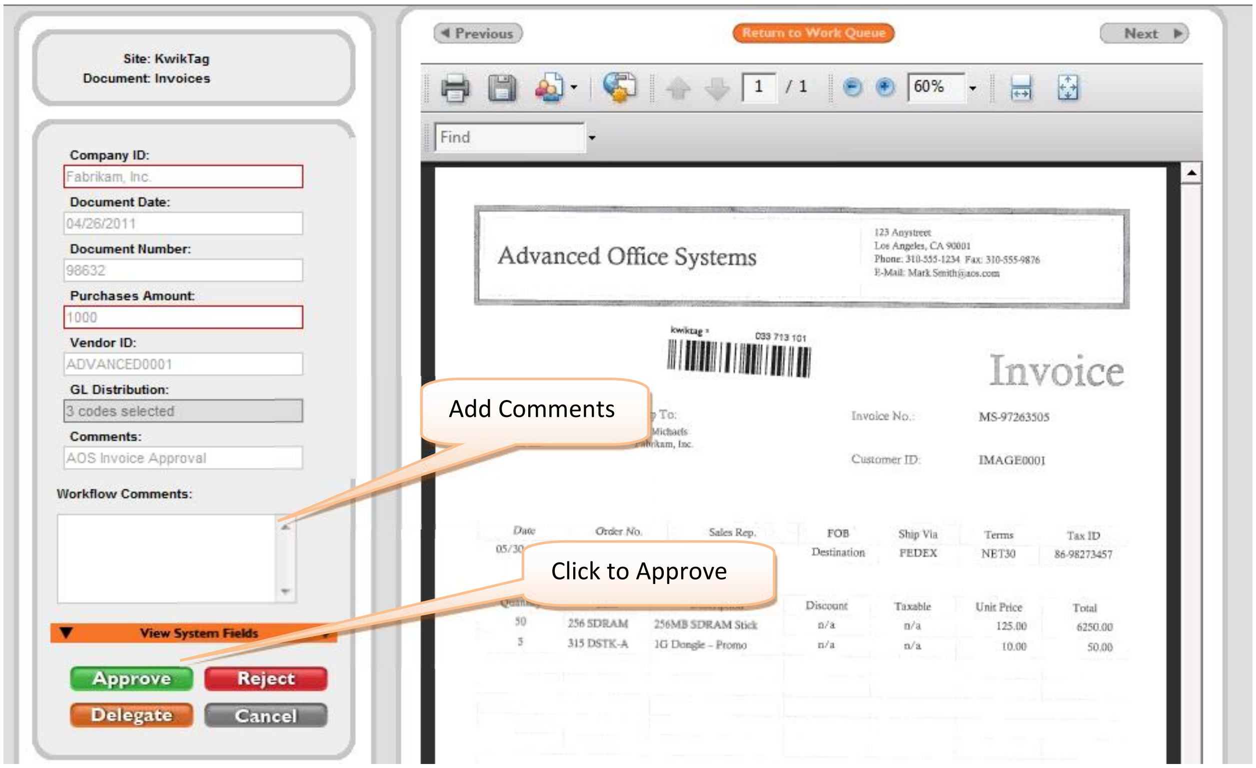


Figure 48

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

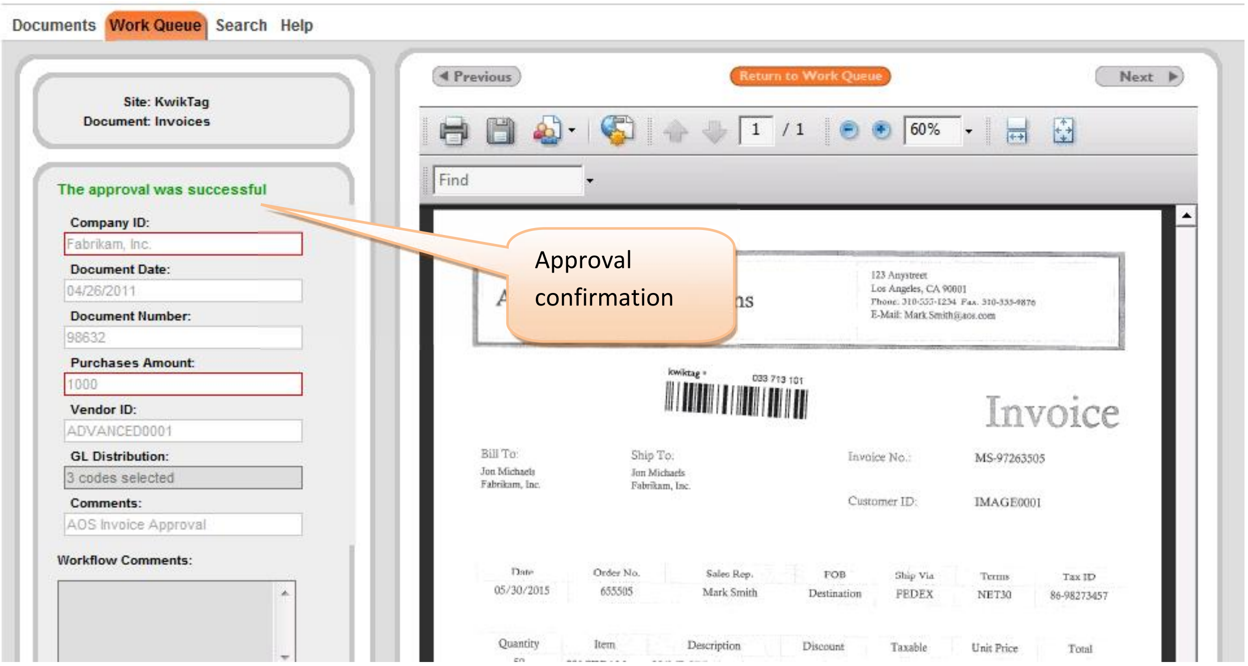

Documents
Work Queue
Search
Help
Site: KwikTag
Document: Invoices
The approval was successful
Company ID:
Fabrikam, Inc.
Document Date:
04/26/2011
Document Number:
98632
Purchases Amount:
1000
Vendor ID:
ADVANCED0001
GL Distribution:
3 codes selected
Comments:
AOS Invoice Approval
Workflow Comments:
Previous
Return to Work Queue
Next
Find
Approval confirmation
Invoice

Figure 49

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:

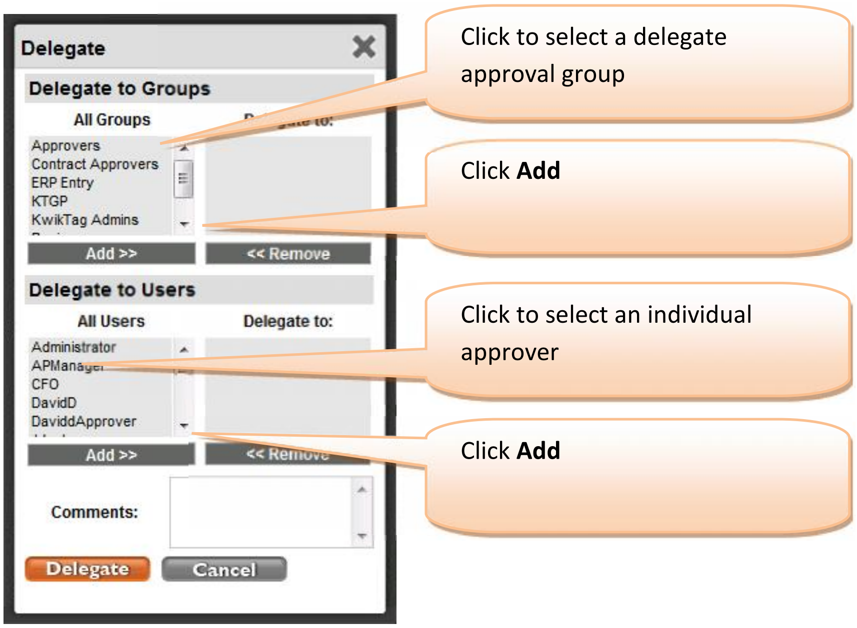


Figure 50

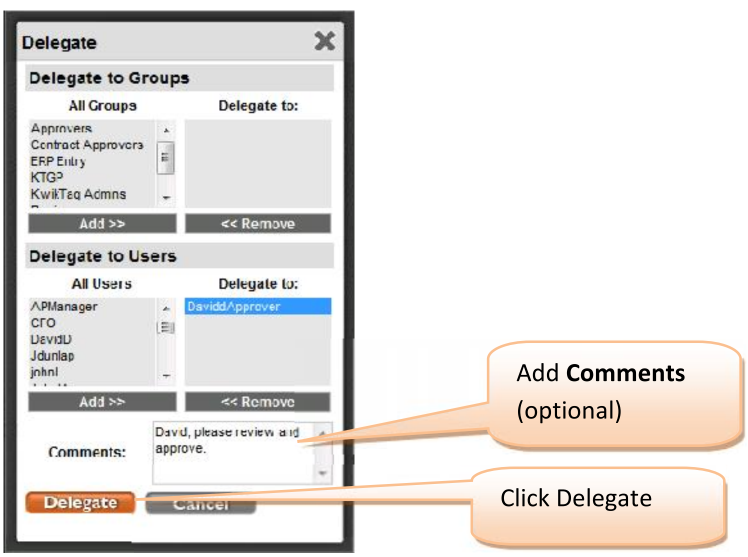
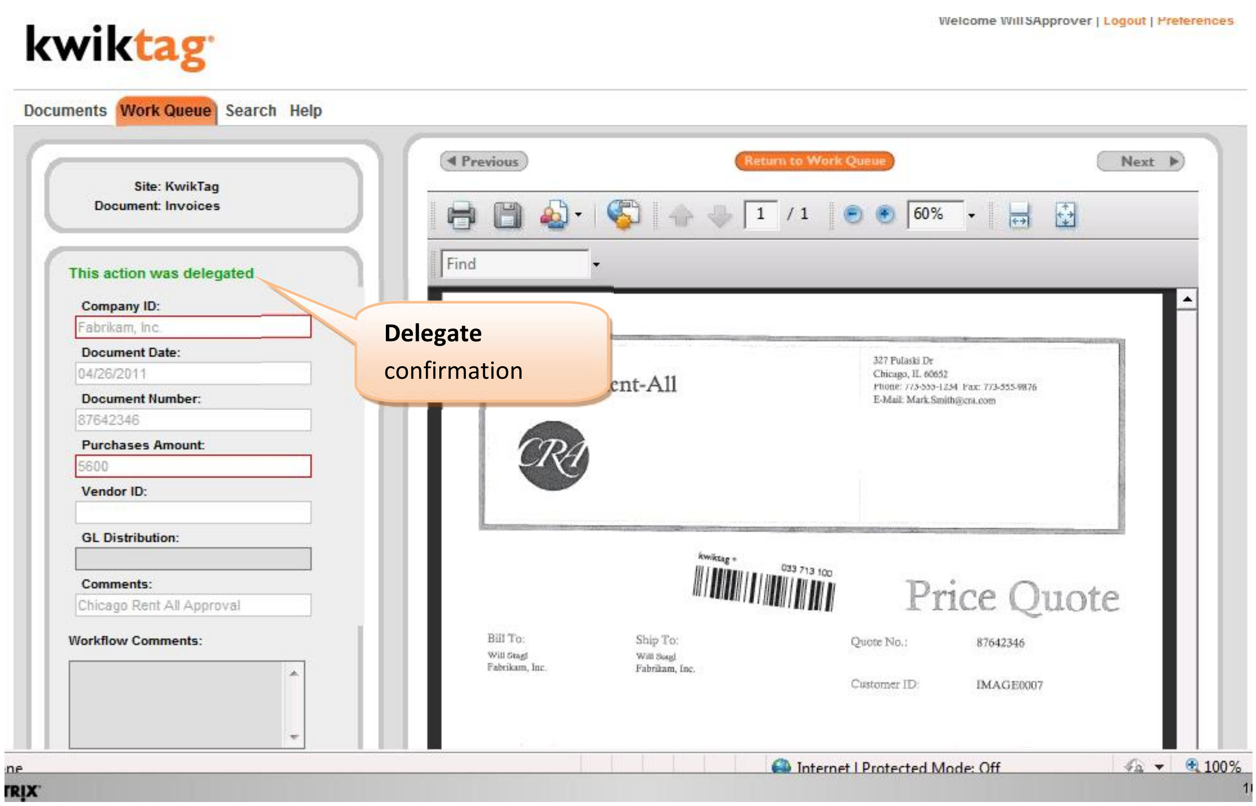


Figure 51


Welcome WillSApprover | Logout | Preferences
Documents
Work Queue
Search
Help
Site: KwikTag
Document: Invoices
This action was delegated
Company ID:
Fabrikam, Inc.
Document Date:
04/26/2011
Document Number:
87642346
Purchases Amount:
5600
Vendor ID:
GL Distribution:
Comments:
Chicago Rent All Approval
Workflow Comments:
Previous
Return to Work Queue
Next
Delegate confirmation
Price Quote
Quote No.:
87642346
Customer ID:
IMAGE0007
Internet | Protected Mode: Off
100%
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.

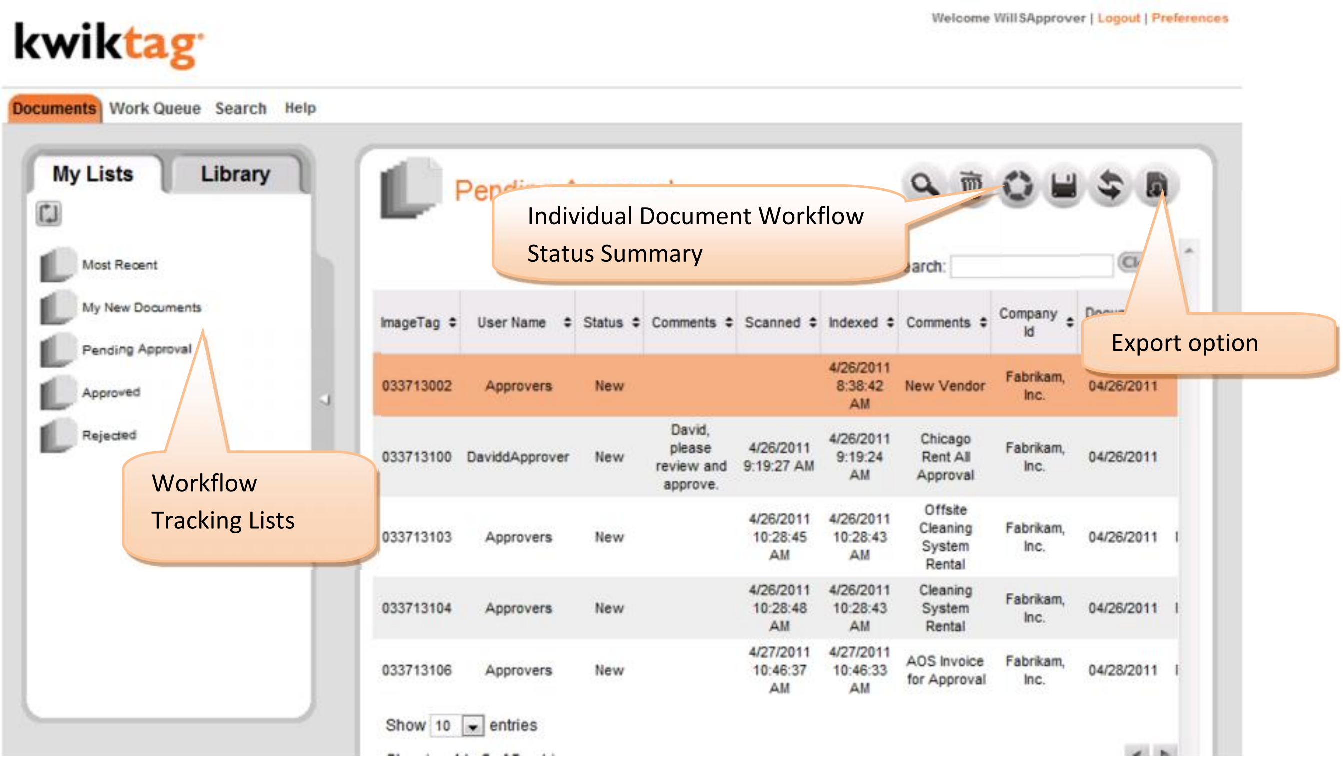


Figure 53

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.

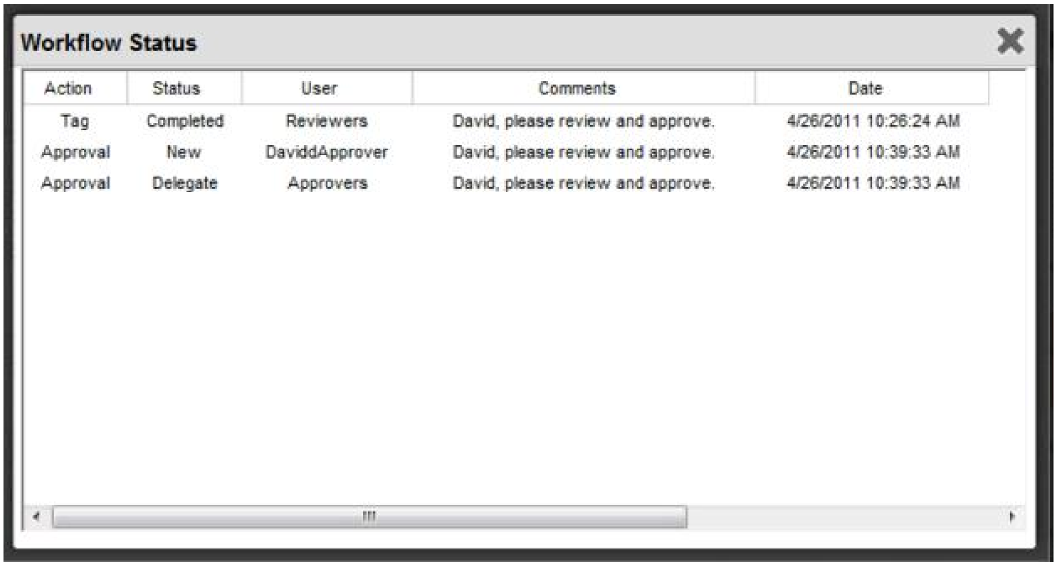


Figure 54

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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