



Web Client User Guide



Microsoft Partner
Silver Application Development

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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 using Internet Explorer
- A KwikTag Logon ID and Password (get this information from your KwikTag Administrator)
- A KwikTag Label Dispenser and a roll of KwikTag Labels (optional)



This guide will show you how to get started using the KwikTag Web Client. User access to KwikTag features depends on your license type.

Logging Into Your KwikTag Client

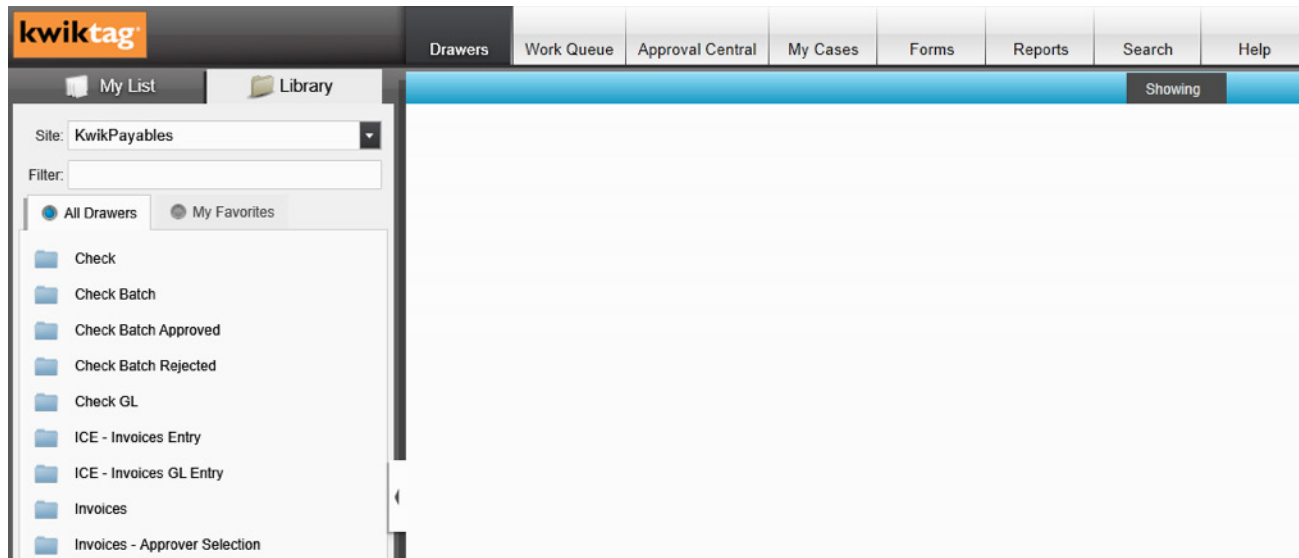
1. Open a Web Browser using Internet Explorer
2. Enter the URL for the KwikTag Server (http://<<Your KwikTag Server Name or IP Address>>)
3. Enter your KwikTag User ID and password
4. Click on the "Login" button symbol or press the Enter key.



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 'Drawers' tab or the 'Work Queue' tab, but can be configured via your user preference "Settings."



KwikTag Drawers Tab

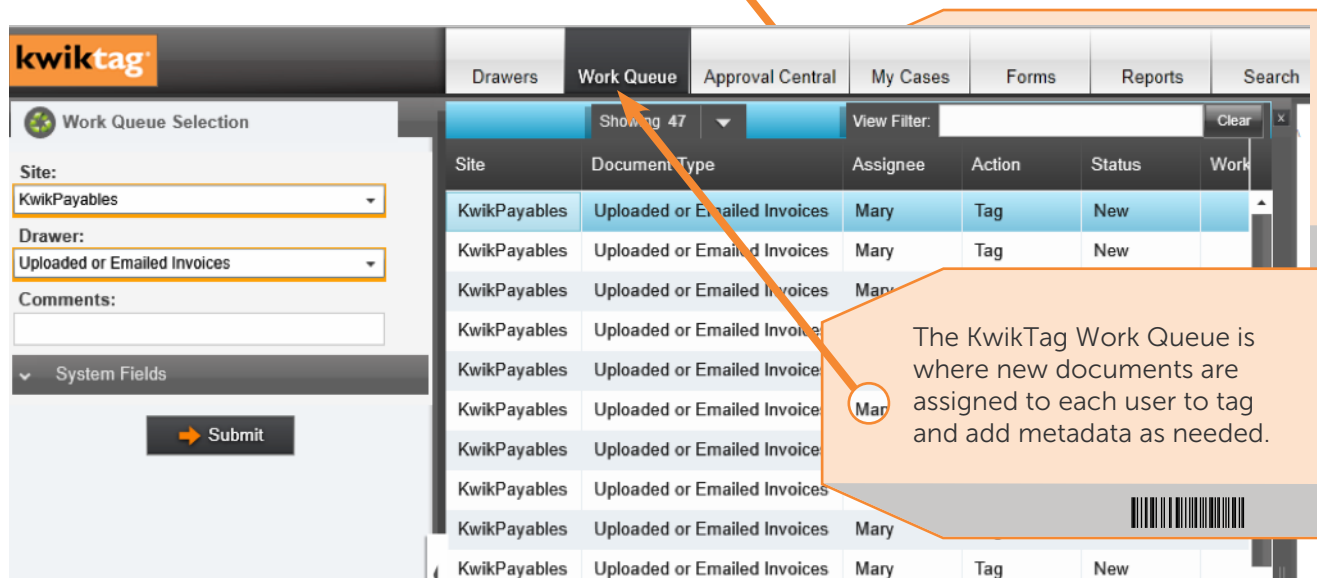
Drawers Tab

The Drawers tab displays documents stored in the KwikTag system and provides access to functions that allow you to add, edit, move, search, or email documents associated with your KwikTag system. From within the drawers tab, users can also index/tag documents or associate related items to the documents in the drawers.

Work Queue Tab

The work queue is applicable only if you have implemented a KwikApp, one of our workflow automation solutions.

The work queue is the primary destination for editors or indexers of documents that have been routed using KwikTag workflow. From this tab, users can enter data and workflow comments related to the document. If the user is also an approver, they can approve, reject or delegate documents based on their business process needs.



The Work Queue Tab

Approval Central Tab

Approval central is applicable only if you have implemented a KwikApp, one of our workflow automation solutions.

The approval central tab is the primary destination for reviewers or approvers of documents that have been routed using KwikTag workflow. From this tab, users can drill down into document details, line items, and other relevant information. Then they can approve, reject or delegate documents based on their business process needs.

Cases Tab

Cases are configured to provide a 360-degree view of any document type. All related documents are displayed in a single place. For example, all employee records or contracts or vendor documents could be viewed in a case.

The ImageTag professional services team (or your KwikTag administrator) will configure the case management views based on your business processes, users and document requirements.

Forms Tab

The forms tab is where all of your corporate form templates can be found by employees and accessed based on user permissions.

For example, vacation requests, benefits, contracts, and other standard company forms can be organized by type using your current templates. They can be in Word, Excel, Outlook or Adobe, just as you would use them today. KwikTag, as your central repository, keeps the latest form versions up to date and available.

Reports Tab

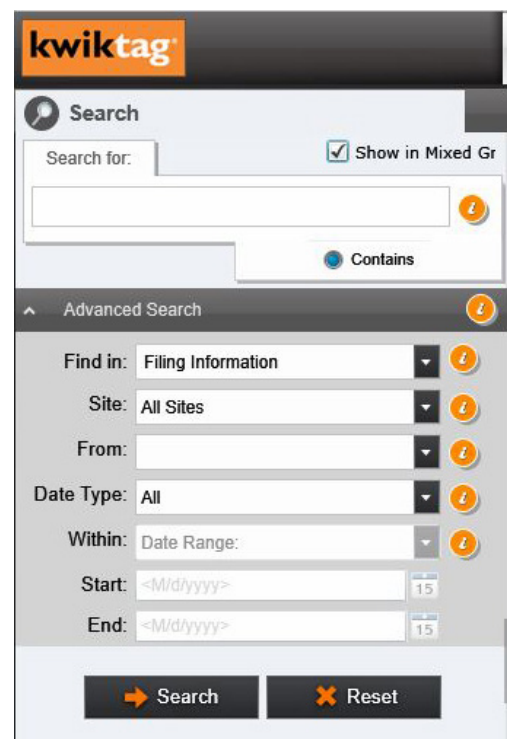
Reports are configured by the ImageTag professional services team (or your KwikTag administrator) to the specific document types and workflow processes in your organization. Reports can include a variety of data associated with documents that have been routed by KwikTag for review and approval.

Search Tab

The KwikTag search functionality provides the ability to conduct a global search across any document stored in any KwikTag drawer. Users have the option to tailor their search based on advanced search criteria, including document metadata or any document content.

Help Tab

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.

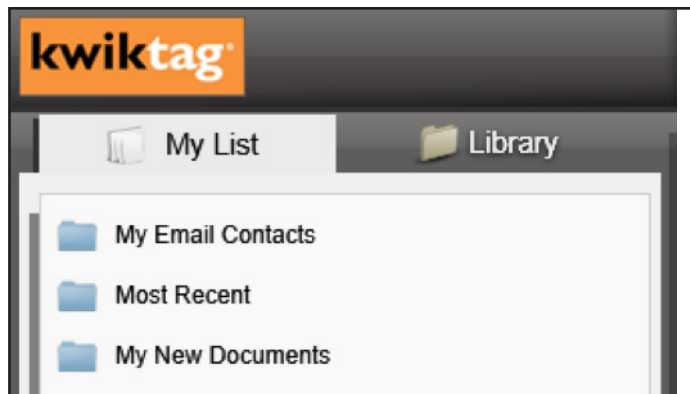


The screenshot shows the KwikTag web client interface. At the top is the KwikTag logo. Below it is a 'Search' section with a search bar, a 'Show in Mixed Gr' checkbox, and a 'Contains' button. Below the search section is an 'Advanced Search' section with various filters: 'Find in:' (Filing Information), 'Site:' (All Sites), 'From:' (empty), 'Date Type:' (All), 'Within:' (Date Range), 'Start:' (<M/d/yyyy>), and 'End:' (<M/d/yyyy>). At the bottom are 'Search' and 'Reset' buttons.

KwikTag Search

Drawers Tab Features and Functions

KwikTag provides easy access to document management functions from a right-click or floating menu. This section of the user guide 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 drawers tab, two icons are displayed that allow users to alternate between views of select documents for quick reference.

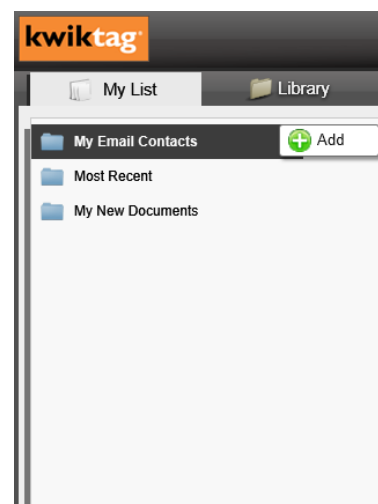
From these tabs, users can access “my list” and “library” records, data and documents in KwikTag.

My Lists and Library Tabs

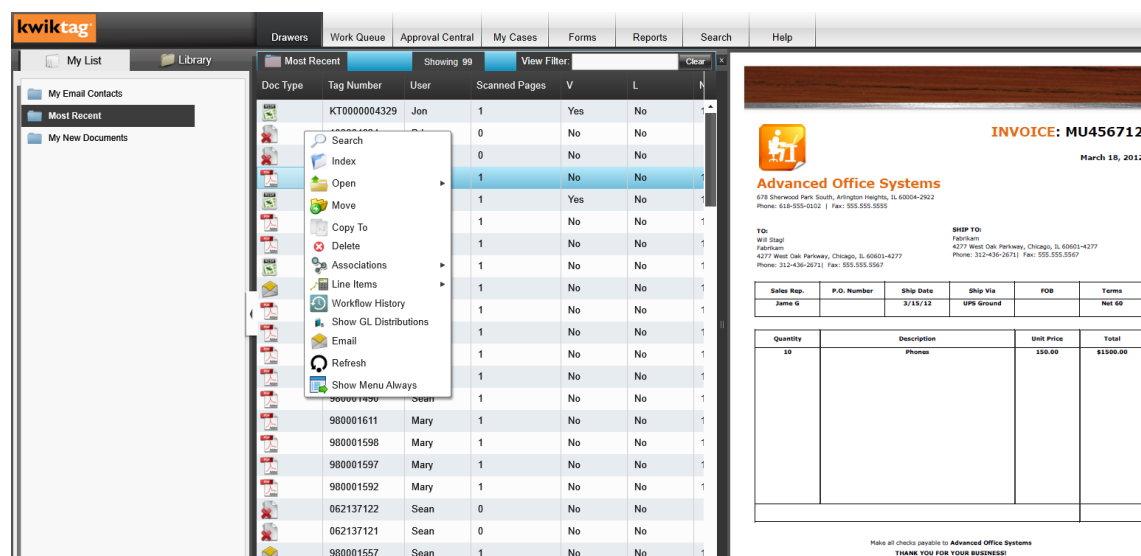
My Lists

My lists provides a view of a subset of documents stored in the KwikTag drawer library. These lists are created by each user selecting the save view function that is accessed from the KwikTag library or searches. The my lists view has its own unique menu of functions, which are a subset of the menu functions available from the KwikTag library.

For example, to add a contact, right click on my email contacts to display the add function. Any contact email address added to KwikTag will be available for use in any other KwikTag function. When a user sends an email from a document from within KwikTag, the email address will automatically be added to your contacts list.



[Add To My Lists](#)



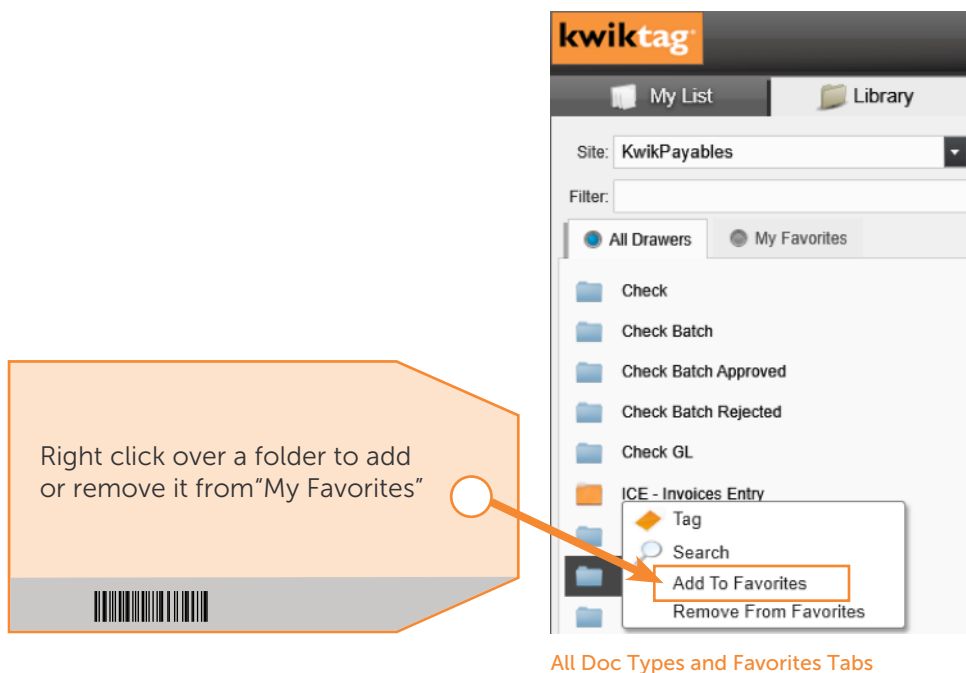
My List Features

The KwikTag Library

The KwikTag library is organized into a series of folders that contain all of 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 library tab, then click the all drawers tab. You may designate frequently-accessed folders as favorites by right-clicking the folder, then clicking add to favorites.

The library of KwikTag drawers has been organized by site and document type for users to access based on their role and permissions.



Tagging Documents

Browse to any file on your PC and upload it to KwikTag.



Upload and Tag Documents

There are multiple methods by which documents can be entered into KwikTag.

Examples include:

- Scan paper with a KwikTag barcode label
- Email documents directly into KwikTag
- Drag and drop from your PC or network drive
- Upload from your PC or network drive

Upload Documents

The option displayed above is to upload a file. Simply browse to the folder where the document is stored and upload it to KwikTag. Then you'll be able to index ("tag") the file with the metadata in the appropriate drawer. This includes header information to name and describe the document as well as the KwikTag barcode or electronic number.

Document System Fields

In addition to the header information entered by the user, the system fields automatically apply the date and time stamps of any user activity.

This is helpful when searching for documents and to ensure that your business meets audit and compliance requirements.

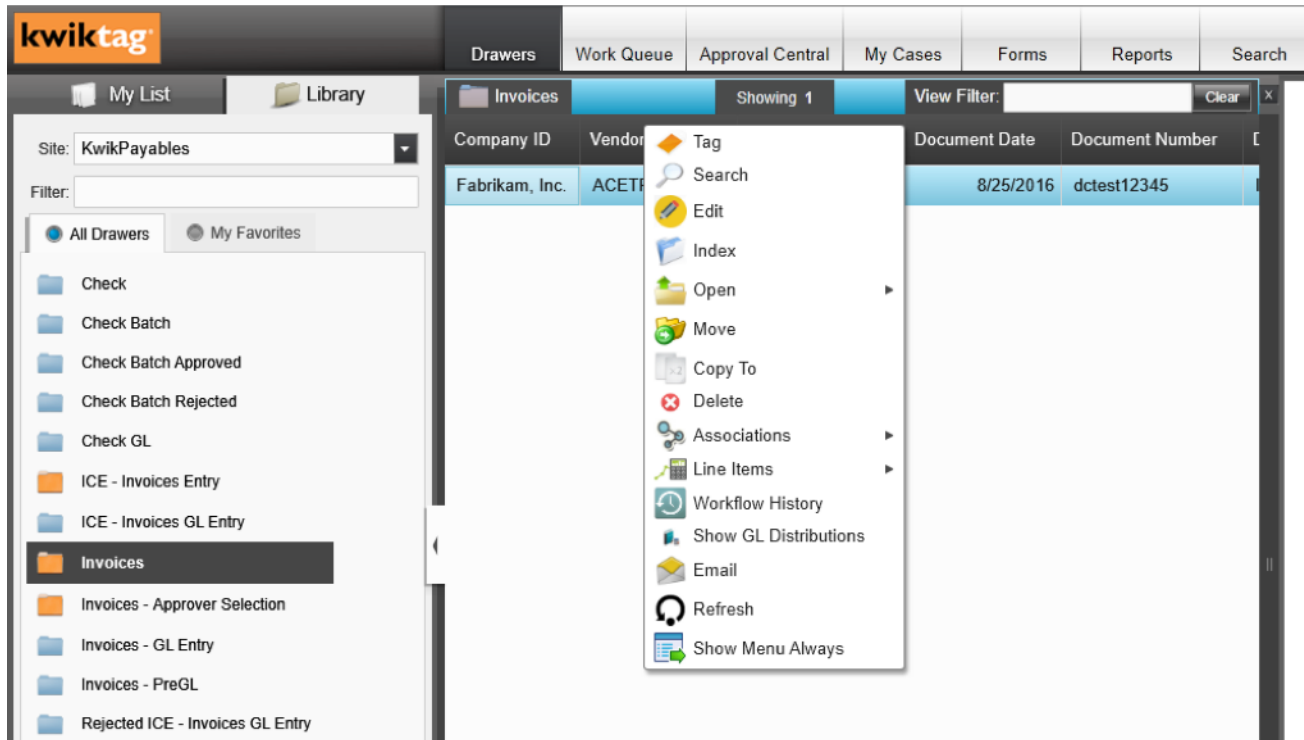
View the KwikTag System Fields to view the "Tag" number, date/time stamp, user and expected page count (if applicable)



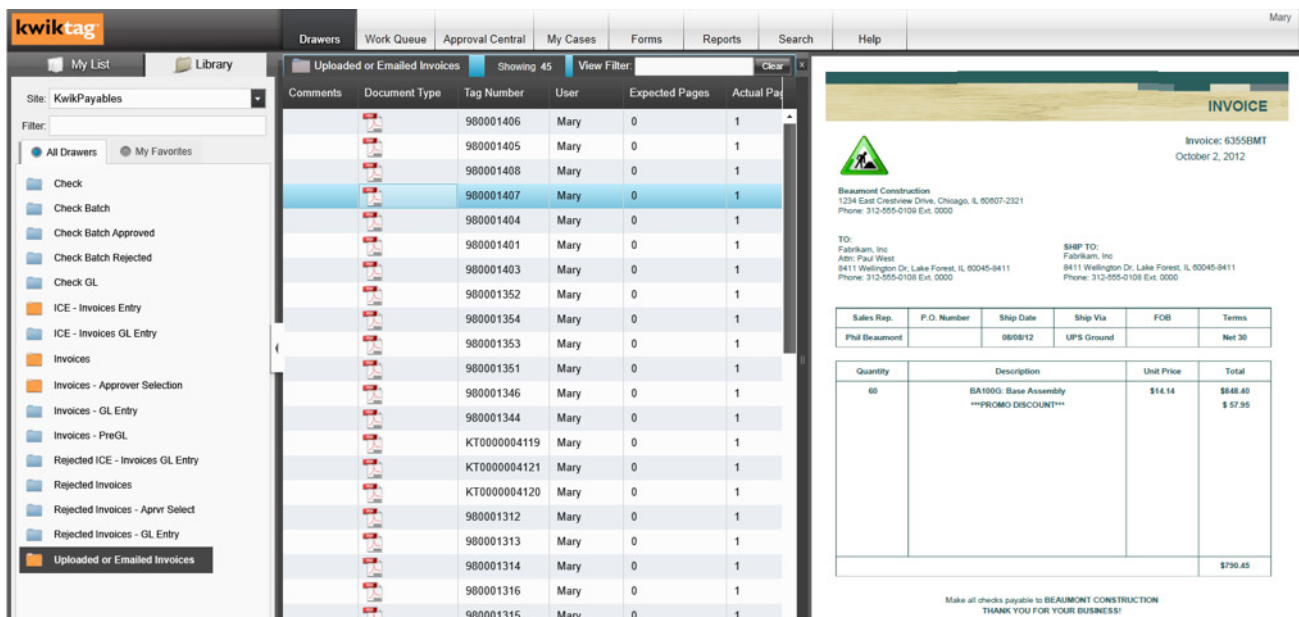
Document System Fields

KwikTag Library Features and Functions

The figure below displays the options available to KwikTag users by right clicking from anywhere within the main my lists window display. A subset of these menu options may also be accessed by selecting the 'show menu lways' option displayed at the bottom of the right-click menu.



KwikTag Document Management Right-Click Menu Options



When a document is selected from a KwikTag "Drawer", a preview is automatically displayed on the right-side pane. Users are able to expand or contract the document display pane.

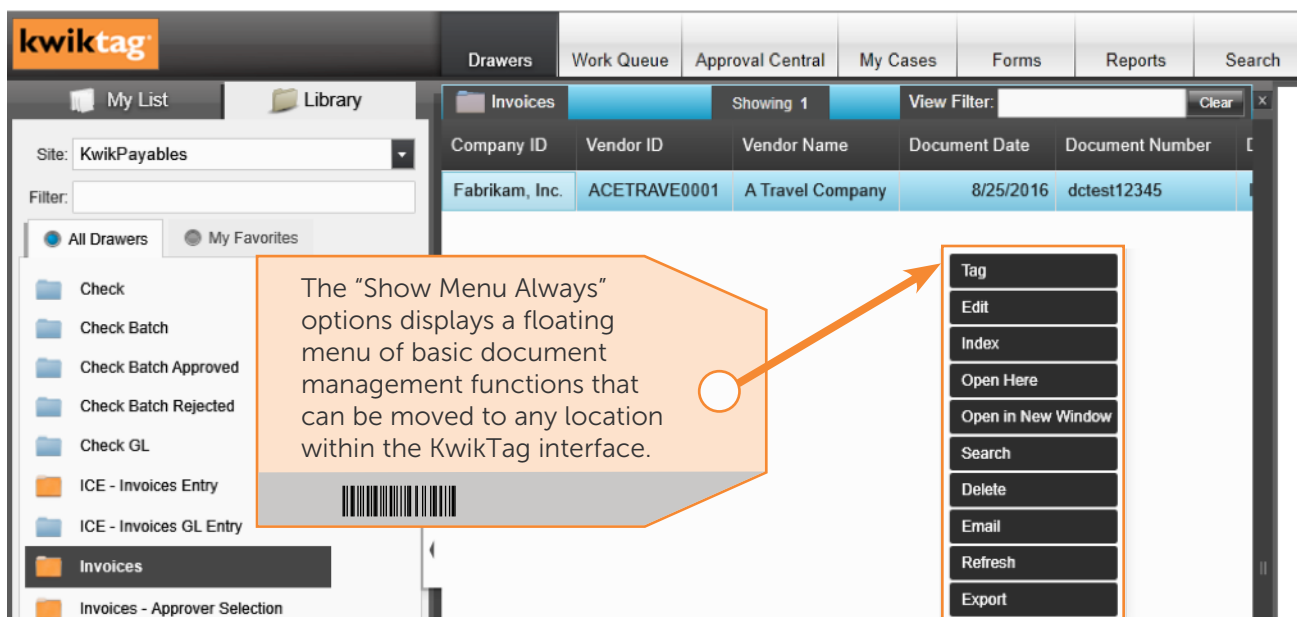
KwikTag Library Features and Functions (cont.)

The KwikTag library presents a menu 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 or from a floating menu.

The KwikTag library displays drawers to the left of the screen. Optionally, these drawers can be organized by site. The selected drawer is highlighted on the left. Its name also appears at the top of the displayed documents.

Menu options available include:

Tag allows users to enter index data associated with a document. Required fields for a tagged document are highlighted in orange. When the user clicks submit, KwikTag assigns the barcode to the record and displays it in the Tag window.



Show Menu Always (KwikTag floating menu)

If scanning the document into KwikTag, an adhesive barcode label is attached to the document. The label will have the same barcode number that 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.

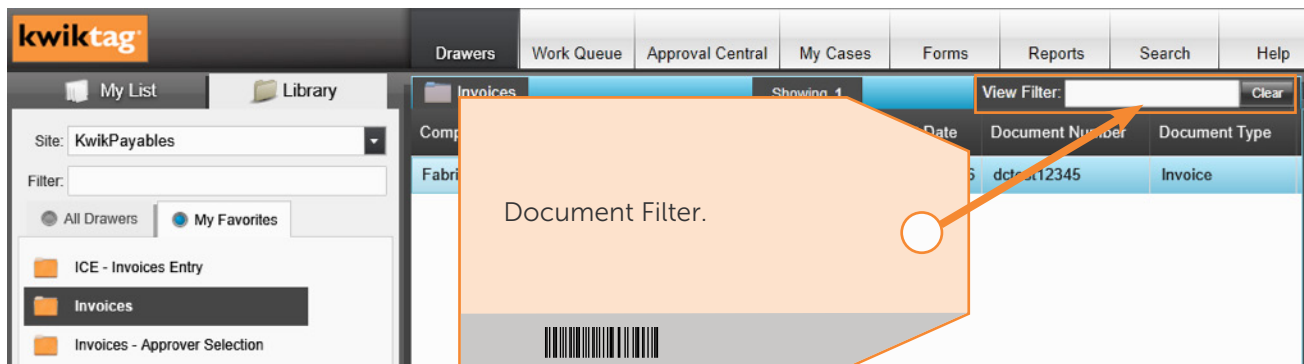
Edit allows users to edit data associated with a KwikTag document.

Index allows users to add header information and metadata about a selected document. As a separate entry in KwikTag, this can either be in the same or different drawer.

Open 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.

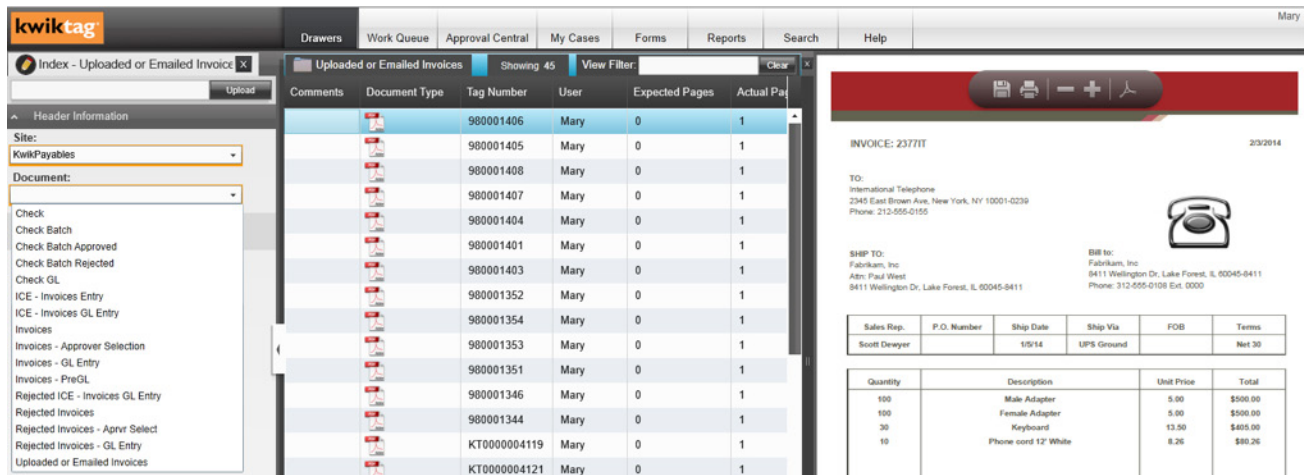
KwikTag Document Filter

In the document list panel, KwikTag presents the option to filter your documents. 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 enter. The filter will then be applied to the entire KwikTag document drawer. To clear the filter, click clear.



KwikTag Document Filter

In the KwikTag "Index" panel on the left, users can input "Site" and "Drawer" filing information associated with the highlighted document, which displays in the panel on the right.



Index Documents

Search allows users to search for documents within a drawer 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, the drawer 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.

Move allows users to move documents and data from one KwikTag site or drawer 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 site and drawer 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 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 access other documents that are related 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 window that displays relevant data. Right clicking on an associated record provides the option to view an associated document. Associations are configured by the ImageTag professional services team.

The screenshot shows the KwikTag web client interface. On the left is a sidebar with a 'Library' section containing a list of drawers. The main area displays a table of documents under the 'Invoices - Approver Selection' drawer. A right-click context menu is open over the second row of the table, with the 'Associations' option highlighted. A sub-menu item 'Show Associations' is visible.

Company ID	Vendor ID	Vendor Name	Document Date	Document Numl
Fabrikam, Inc.	IMAGEMAK0001	Image	3/2016	4355IMA
Fabrikam, Inc.	ADVANCED0001	Advan	3/2016	5355AOS-0823

"Show Associations" allows users to view other documents associated with a transaction.

Refresh updates 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.

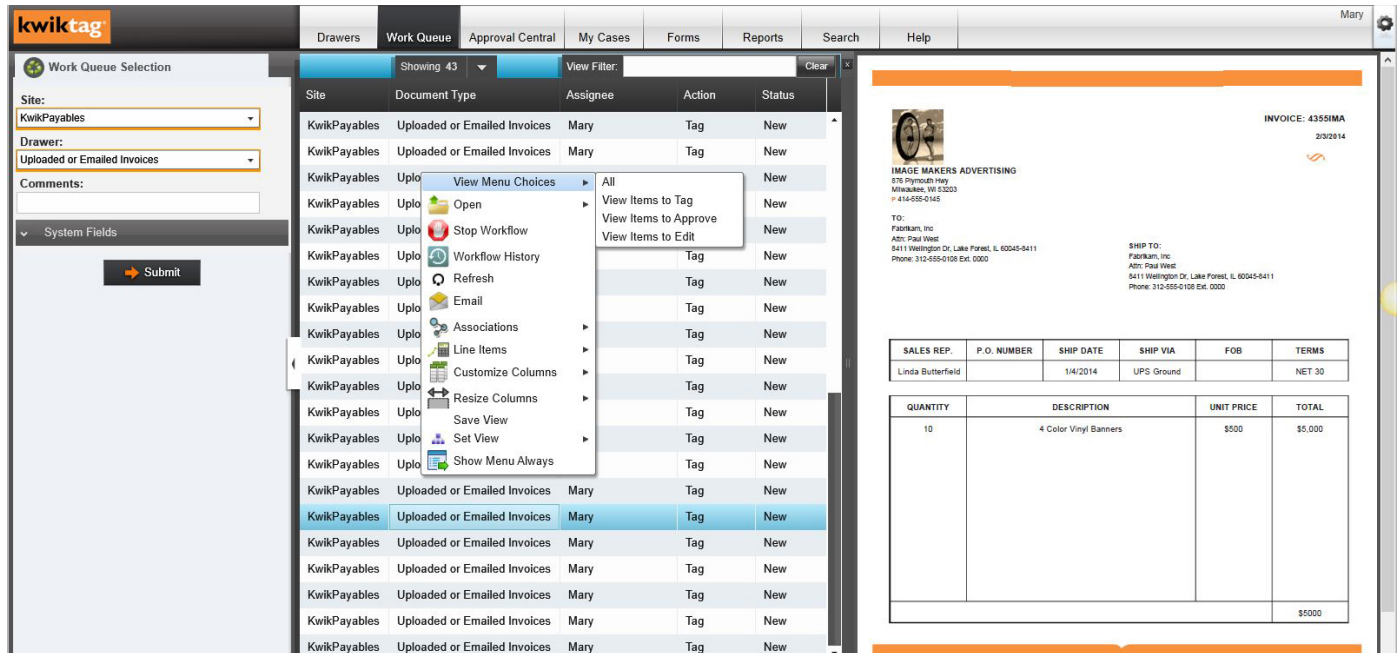
Email allows users to email documents as attachments, links to the record in KwikTag, or both.

E-mail Notification

Work Queue Features And Functions

The KwikTag Work Queue is designed to assign documents to KwikTag users . Within the work queue, KwikTag users can tag, edit, or approve based on their roles and the business process. Workflows can be pre-configured by the ImageTag professional services team as part of your deployment, based on your organization's unique business rules.

KwikTag administrators have access to KwikTag workflow configuration. Once training has been completed, they can modify workflow processes or create new workflows according to your business needs.



KwikTag work queue with inline document display

Open functions like the open options from the drawers tab. Users can choose to open here and view documents in a viewer window in line with the document data or in a separate window.

Stop Workflow is used to terminate an active workflow at any point during the process. The workflow item is marked as stopped for audit purposes. Users must be members of the workflow admin group to have access to stop a workflow.

Workflow History displays an audit trail view of each step that has been completed in a workflow process for documents that have been indexed and routed for approval.

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

Email functions the same way in the work queue as it does in the drawers tab.

Associations functions the same way in the work queue as they do in the drawers tab.

Line Items displays line item detail associated with a document, such as an invoice.

Customize Columns 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 view to return to the updated display.

Resize Columns allows users to format column widths based on column header or cell size. Users also have the option to auto size.

Save View allows the user to save the view that has been displayed based on the filter.

Set View allows the user to toggle between the saved view and the default view, which displays all records in the work queue.

Show Menu Always functions the same as it does in the drawers tab.

Users can click the drop down next to the "showing" label to select document criteria to include in their displayed list.

The screenshot displays the Kwiktag Web Client interface. On the left is the 'Work Queue Selection' sidebar with filters for Site (KwikPayables), Drawer (Uploaded or Emailed Invoices), and a Submit button. The main area shows a table of document entries with columns: Site, Document Type, Assignee, Action, Status, and Work. The table lists multiple 'KwikPayables' entries, all with 'Uploaded or Emailed Invoices' as the document type and 'Mary' as the assignee. On the right, an 'INVOICE' is displayed for 'Pilar Ackerman' with invoice number 'CONT2244' dated 'December 1, 2014'. The invoice includes a table of line items with columns: Quantity, Description, Unit Price, and Total. The line items are: 1 4G Base Station Signal Check Up (\$2000.00), 1 LTE Data Throughput Optimization (\$15000.00), and 5 Lexicon XBT GSM Signal Amplifier (\$2700.00). The total amount is \$40,500.00.

Quantity	Description	Unit Price	Total
1	4G Base Station Signal Check Up	2000.00	2000.00
1	LTE Data Throughput Optimization	15000.00	15000.00
5	Lexicon XBT GSM Signal Amplifier	2700.00	13500.00
			\$40,500.00

Document Display Criteria

KwikTag Work Queue Features and Functions (cont.)

Documents are organized in the work queue by type. The document type displays the drawer in which the document resides. The action required by each user is displayed indicating the user needs to tag, edit, or approve each document in their work queue.

The screenshot displays the KwikTag Work Queue interface. On the left, the 'Work Queue Selection' panel shows filters for Site (KwikPayables), Drawer (Uploaded or Emailed Invoices), and Comments. The main table lists documents with columns for Site, Document Type, Assignee, Action, Status, and Work. The right panel shows an invoice preview for 'INVOICE' with details for Pilar Ackerman, including contact information and a table of items.

Quantity	Description	Unit Price	Total
1	4G Base Station Signal Check Up	12000.00	12000.00
1	LTE Data Throughput Optimization	15000.00	15000.00
5	Lexicon XBT GSM Signal Amplifier	2700.00	13500.00
			\$40,500.00

KwikTag Work Queue for Indexers. The Drawer displayed is the current document location. To tag the document and add relevant metadata, select the Drawer in which the document should be stored.

Users, typically indexers, enter the metadata in the tag panel on the left to tag the current document. Data can be selected from the document on the right using copy/paste functionality in most situations.

This screenshot shows the KwikTag Work Queue interface with the 'Tag' panel on the left expanded. It includes fields for Site, Drawer, Company ID, Vendor ID, Vendor Name, Document Date (9/15/2016), Document Number, Document Type, Purchases Amount, GL Distribution, and Comments. The main table and invoice preview are also visible.

Once the destination Drawer has been selected, the metadata fields related to that Drawer are displayed in the left "Tag" panel for completion and submission of the document.

Filter at the top of the work queue screen functions like the filter from the drawers tab. However, retrieving documents from the work queue functions differently. To filter records in your work queue, enter a keyword in the filter window and press enter. The filter window will retain the keywords, highlighted in yellow. Only records that contain the keyword in the document will be displayed.

The screenshot shows the Kwiktag Web Client interface. The top navigation bar includes tabs for Drawers, Work Queue, Approval Central, My Cases, Forms, Reports, Search, and Help. The 'Work Queue' tab is active. On the left, there's a 'Work Queue Selection' sidebar. The main area shows a list of documents filtered by the keyword 'image'. The 'View Filter' dropdown is set to 'image'. The document displayed is an invoice for 'IMAGE MAKERS ADVERTISING'.

INVOICE: 4355IMA
2/3/2014

IMAGE MAKERS ADVERTISING
876 Plymouth Hwy
Milwaukee, WI 53203
P 414-555-0145

TO:
Fabricam, Inc
Attn: Paul West
8411 Wellington Dr, Lake Forest, IL 60045-8411
Phone: 312-555-0100 Ext. 0000

SHIP TO:
Fabricam, Inc
Attn: Paul West
8411 Wellington Dr, Lake Forest, IL 60045-8411
Phone: 312-555-0100 Ext. 0000

SALES REP.	P.O. NUMBER	SHIP DATE	SHIP VIA	FOB	TERMS
Linda Butterfield		1/4/2014	UPS Ground		NET 30

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
10	4 Color Vinyl Banners	\$500	\$5,000
			\$5000

Filter by the keyword "image" displays only the document in the work queue file that contains the word "image."

Save View allows the user to save the view that has been displayed based on the filter.

Set View allows the user to toggle between the saved view and the default view, which displays all records in the work queue.

Resize Columns 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.

Approval Central Features and Functions

Approval central is designed for KwikTag users who are authorized to review, approve, or delegate documents based on their business process. In some cases, approvers also need to edit documents, in which case they would make edits in the work queue.

KwikTag users who only approve documents are issued, "approver licenses" which are free.

The screenshot displays the KwikTag web client interface. The top navigation bar includes tabs for Drawers, Work Queue, Approval Central (selected), My Cases, Forms, Reports, Search, and Help. The user is logged in as MaryDeptManager.

The main content area is divided into two panes. The left pane shows a list of invoices under the 'Invoices - Approver Selection' tab. The table lists the following data:

Company ID	Vendor ID	Vendor Name	Document Date	Document Number	Document Type
Fabrikam, Inc.	BEAUMONT0001	Beaumont Construction	06/28/2016	6355BMT-test	Invoice
Fabrikam, Inc.	ADVANCED0001	Advanced Office Systems	08/23/2016	5355AOS-082316	Invoice
Fabrikam, Inc.	IMAGEMAK0001	Image Makers Advertising	08/23/2016	4355IMA	Invoice

Below this, there is a 'Check Batch' section with a table showing a batch of invoices for Fabrikam, Inc. with a total purchase amount of \$25.25.

The right pane displays a detailed view of an invoice for Beaumont Construction. The invoice number is 6355BMT, dated October 2, 2012. It includes contact information for both the vendor and the customer (Fabrikam, Inc.). The invoice details are as follows:

Sales Rep.	P.O. Number	Ship Date	Ship Via	FOB	Terms
Phil Beaumont		08/08/12	UPS Ground		Net 30

Quantity	Description	Unit Price	Total
60	BA1000: Base Assembly	\$14.14	\$848.40
	PROMO DISCOUNT		\$ 57.95
			\$790.45

At the bottom of the invoice view, it states: "Make all checks payable to: BEAUMONT CONSTRUCTION. THANK YOU FOR YOUR BUSINESS!"

KwikTag Approval Central is the tab that allows approvers to quickly review all pending documents, regardless of document type, and then approve, reject or delegate.

This screenshot shows the 'Edit' form for an invoice in the KwikTag system. The left pane contains the 'Edit' form with the following fields:

- Company ID:** Fabrikam, Inc.
- Vendor ID:** ACETRAVE0001
- Vendor Name:** A Travel Company
- Document Date:** 8/25/2016
- Document Number:** 6355BMT-test
- Document Type:** Invoice
- Purchases Amount:** 100.00
- GL Distribution:** (empty)
- Comments:** (empty)
- Due Date:** 8/25/2016
- Workflow Comments:** (empty)

The right pane shows a detailed view of the invoice for Beaumont Construction, dated August 4, 2014. The invoice number is 56377BMT. It includes contact information and a table of items:

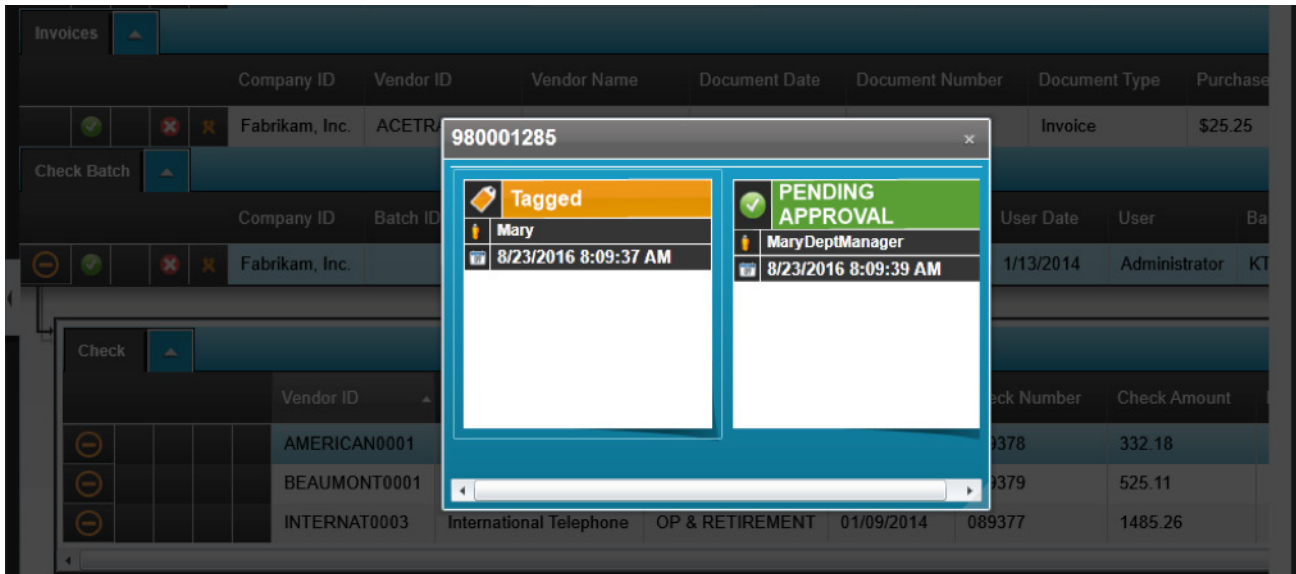
Sales Rep.	P.O. Number	Ship Date	Ship Via	FOB	Terms
Phil Beaumont		07/28/14	UPS Ground		Net 30

Quantity	Description	Unit Price	Total
400	BA1000: Base Assembly	\$14.14	\$5,656.00
			\$5,656.00

At the bottom, it states: "Make all checks payable to: BEAUMONT CONSTRUCTION. THANK YOU FOR YOUR BUSINESS!"

Approval Central provides the ability to drill down into the document detail to approve or reject complete documents or individual line items. Each of the display panes can be hidden, expanded or contracted to view the most relevant information for each approver.

Workflow History allows users to view audit trail details about each document, including user, date/time stamp, and document stage.



Workflow history view

Show GL Distributions displays the General Ledger (G/L) distributions, including the account codes and debit/credit amounts associated with documents, such as invoices.

kwiktag

Drawers

Work Queue

Approval Central

My Cases

Forms

Reports

Search

Help

MaryDeptManager

Invoices - Approver Selection

Company ID	Vendor ID	Vendor Name	Document Date	Document Number	Document Type
Fabrikam, Inc.	BEAUMONT0001	Beaumont Construction	06/28/2016	6355BMT-test	Invoice
Fabrikam, Inc.	ADVANCED0001	Advanced Office Systems	08/23/2016	5355AOS-082316	Invoice
Fabrikam, Inc.	IMAGEMAK0001	Image Makers Advertising	08/23/2016	4355IMA	Invoice

Invoices

Company ID	Vendor ID	Vendor Name	Document Date	Document Number	Document Type	Purchase
Fabrikam, Inc.	ACETRAVE0001	A Travel Company	08/25/2016	dctest12345	Invoice	\$25.25

Check Batch

Company ID	Batch ID	Checkbook ID	Amount	User ID	Check Date	User Date	User
Fabrikam, Inc.		First		kbraun	1/9/2014	1/13/2014	Administrator

GL Distribution

Account	Description	Type	Reference	Debit	Credit
000-2100-00	Accounts Payable	PAY		\$0.00	\$790.45
100-6170-00	Repairs & Maintenance - Administration	PURCH		\$790.45	\$0.00

INVOICE

Invoice: 6355BMT

October 2, 2012

Beaumont Construction

1234 East Crestview Drive, Chicago, IL 60607-2321

Phone: 312-555-0100 Ext. 0000

TO:

Fabrikam, Inc.

Attn: Paul West

8411 Wellington Dr, Lake Forest, IL 60045-8411

Phone: 312-555-0100 Ext. 0000

SHIP TO:

Fabrikam, Inc.

8411 Wellington Dr, Lake Forest, IL 60045-8411

Phone: 312-555-0100 Ext. 0000

Sales Rep.	P.O. Number	Ship Date	Ship Via	FOB	Terms
Phil Beaumont		08/08/12	UPS Ground		Net 30

Quantity	Description	Unit Price	Total
60	BA100G: Base Assembly	\$14.14	\$848.40
	PROMO DISCOUNT		\$ 57.95
			\$790.45

Make all checks payable to BEAUMONT CONSTRUCTION

THANK YOU FOR YOUR BUSINESS!

General Ledger distribution display

My Cases Features and Functions

The KwikTag my cases tab allows users to see all related documents of a given type. Cases can be pre-configured by the ImageTag 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, invoice payment, or human resources where job requisitions, postings, 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.

The screenshot shows the 'My Cases' tab in the KwikTag web client. The left sidebar lists job positions with details like Position ID, Position Title, Department Name, and Hiring Manager Name. The main area displays a table of 'Approved Resumes' for 'Sales Executive' positions. A right-click menu is open, showing options like 'Job Description', 'Position ID', 'Department Name', etc. The right pane displays the resume for Jacob Smith, including a 'Professional Summary' and 'Employment History'.

The cases view shown here represents a hiring process.

This screenshot shows a detailed view of a hiring process. The background shows the 'Approved Resumes' table. A right-click menu is open, showing options like 'Job Description', 'Position ID', 'Department Name', etc. The right pane displays the resume for Jacob Smith, including a 'Professional Summary' and 'Employment History'.

Right-click on a document and select the workflow history to display the notes and actions taken for each candidate in the hiring process, or other process based on your business needs.

Reports Features and Functions

The KwikTag Reports tab displays a variety of different views of documents and related data. The reports available to KwikTag users depend on their KwikTag configuration, the document types and their approval workflows.

KwikTag Reports are accessible when a user clicks 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 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.).

As with other KwikTag features, functionality is accessed via right-click menus. Functionality that is unique to the reports tab is identified in this section of the user guide.

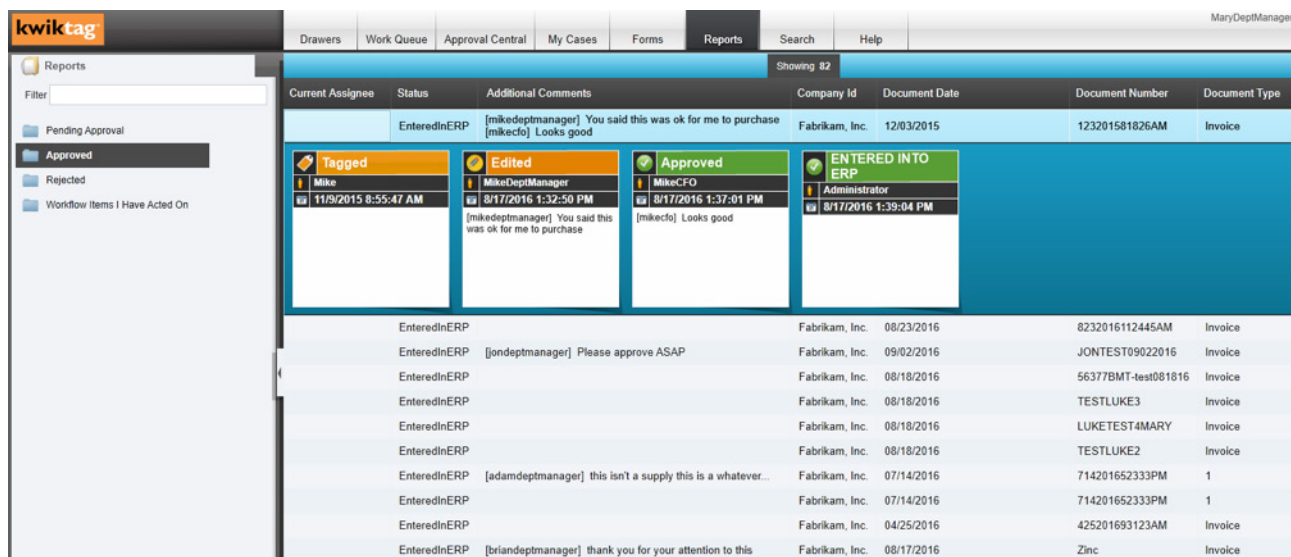
The screenshot displays the KwikTag web client interface. The top navigation bar includes tabs for Drawers, Work Queue, Approval Central, My Cases, Forms, Reports, Search, and Help. The Reports tab is active, showing a list of 27 documents. On the left, a sidebar contains a 'Reports' section with a filter dropdown and a list of categories: Pending Approval, Approved, Rejected, and Workflow Items I Have Acted On. The main table lists documents with columns for Tag Number, Current Site, Current Drawer, User Id, User Name, and My Most Recent Workflow Action. A right-click menu is open over the document with Tag Number 980000845. On the right, a preview of an invoice is shown, including a header with 'INVOICE' and 'October 2, 2012', a body with a table of items, and a footer with 'Make all checks payable to BEAUMONT CONSTRUCTION'.

Tag Number	Current Site	Current Drawer	User Id	User Name	My Most Recent Workflow Action
980000846	Fabrikam, Inc.	Payables Transaction Entry	MaryCFO	Mary Miller	Document Tagged
980000847	Fabrikam, Inc.	Payables Transaction Entry	MaryCFO	Mary Miller	Document Tagged
980000845	KwikPayables	Invoices - Approver Selection	MaryCFO	Mary Miller	Document Tagged
L1000000581	KwikExpense	Receipt Lines	MaryCFO	Mary Miller	Document Tagged
KT0000003260	KwikExpense	Receipts	MaryCFO	Mary Miller	Document Tagged
980000844	Fabrikam, Inc.	Payables Transaction Entry	MaryCFO	Mary Miller	Document Created in ERP
KT0000003248	Fabrikam, Inc.	Payables Transaction Entry	MaryCFO	Mary Miller	Document Created in ERP
KT0000002798	Fabrikam, Inc.	Payables Transaction Entry	MaryCFO	Mary Miller	Document Created in ERP
980000693	Fabrikam, Inc.	Payables Transaction Entry	MaryCFO	Mary Miller	Document Created in ERP
980000354	Fabrikam, Inc.	Payables Transaction Entry	MaryCFO	Mary Miller	Document Created in ERP
980000603	Fabrikam, Inc.	Payables Transaction Entry	MaryCFO	Mary Miller	Document Created in ERP
KT0000002976	Fabrikam, Inc.	Payables Transaction Entry	MaryCFO	Mary Miller	Document Created in ERP
L1000000566	KwikExpense	Receipt Lines	MaryCFO	Mary Miller	Document Tagged
KT0000003021	KwikExpense	Receipts	MaryCFO	Mary Miller	Document Tagged
KT0000002970	Fabrikam, Inc.	Payables Transaction Entry	MaryCFO	Mary Miller	Document Created in ERP
KT0000002791	Fabrikam, Inc.	Payables Transaction Entry	MaryCFO	Mary Miller	Document Created in ERP
980000524	KwikPayables	Uploaded or Emailed Invoices	MaryCFO	Mary Miller	Document Tagged
980000525	KwikPayables	Uploaded or Emailed Invoices	MaryCFO	Mary Miller	Document Tagged
980000523	Fabrikam, Inc.	Payables Transaction Entry	MaryCFO	Mary Miller	Document Tagged
980000528	KwikPayables	ICE - Invoices Entry	MaryCFO	Mary Miller	Document Tagged
980000527	KwikPayables	ICE - Invoices Entry	MaryCFO	Mary Miller	Document Tagged

Reports view

Export 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, not document images.

Workflow History in the report view displays every step of a document process. The audit trail view includes details about each document, such as user, date/time stamp, and document stage.



Current Assignee	Status	Additional Comments	Company Id	Document Date	Document Number	Document Type
EnteredInERP	EnteredInERP	[mikedptmanager] You said this was ok for me to purchase [mikecfo] Looks good	Fabrikam, Inc.	12/03/2015	123201581826AM	Invoice
Tagged Mike 11/9/2015 8:55:47 AM	Edited MikeDeptManager 8/17/2016 1:32:50 PM [mikedptmanager] You said this was ok for me to purchase	Approved MikeCFO 8/17/2016 1:37:01 PM [mikecfo] Looks good	ENTERED INTO ERP Administrator 8/17/2016 1:39:04 PM			
EnteredInERP			Fabrikam, Inc.	08/23/2016	8232016112445AM	Invoice
EnteredInERP	[jondeptmanager] Please approve ASAP		Fabrikam, Inc.	09/02/2016	JONTEST09022016	Invoice
EnteredInERP			Fabrikam, Inc.	08/18/2016	56377BMT-test081816	Invoice
EnteredInERP			Fabrikam, Inc.	08/18/2016	TESTLUKE3	Invoice
EnteredInERP			Fabrikam, Inc.	08/18/2016	LUKETEST4MARY	Invoice
EnteredInERP			Fabrikam, Inc.	08/18/2016	TESTLUKE2	Invoice
EnteredInERP	[adamdeptmanager] this isn't a supply this is a whatever...		Fabrikam, Inc.	07/14/2016	714201652333PM	1
EnteredInERP			Fabrikam, Inc.	07/14/2016	714201652333PM	1
EnteredInERP			Fabrikam, Inc.	04/25/2016	425201693123AM	Invoice
EnteredInERP	[briandptmanager] thank you for your attention to this		Fabrikam, Inc.	08/17/2016	Zinc	Invoice

KwikTag Reports display documents and associated data that can be configured based on a variety of criteria, such as the document type, status and workflow processes. The complete workflow history can be viewed [here](#).

Search Features and Functions

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.

KwikTag Advanced Search can be accessed by clicking the advanced search link beneath the search field.

The screenshot shows the KwikTag Advanced Search interface. On the left, there is a search sidebar with the following fields:

- Search for:** advanced
- ☒ Show in Mixed Gr
- Advanced Search:**
 - Find in:** Document Content
 - Site:** All Sites
 - From:** (empty)
 - Date Type:** All
 - Within:** Date Range: (empty)
 - Start:** <M/d/yyyy> (15)
 - End:** <M/d/yyyy> (15)
- Buttons:** Search, Reset

The main results area shows a table with the following columns: Type, Site, Doc Type, Tag Number. The results are filtered to show 463 items. The first few rows are:

Type	Site	Doc Type	Tag Number
Fabrikam, Inc.	Payables Transaction Entry	980001467	
Fabrikam, Inc.	Payables Transaction Entry	980001466	
Fabrikam, Inc.	Payables Transaction Entry	980001465	
Fabrikam, Inc.	Payables Transaction Entry	980001464	
Fabrikam, Inc.	Payables Transaction Entry	980001460	
Fabrikam, Inc.	Payables Transaction Entry	980001434	
Fabrikam, Inc.	Payables Transaction Entry	980001433	
Fabrikam, Inc.	Purchasing Vendor	980001451	
Fabrikam, Inc.	Payables Transaction Entry	KT0000004214	
Fabrikam, Inc.	Payables Transaction Entry	980001249	
Fabrikam, Inc.	Payables Transaction Entry	980001446	
Fabrikam, Inc.	Payables Transaction Entry	980001445	

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

This screenshot shows the same KwikTag Advanced Search interface as the previous one, but with a document metadata pop-up window displayed for the selected document (Tag Number 980001460). The pop-up window contains the following information:

- Barcode:** 980001460
- Document Type:** pdf
- Date Modified:** 9/15/2016
- Archive Date:** (empty)
- Retention Scanned:** 1
- Site:** Fabrikam, Inc.
- 1099 Amount:** (empty)
- Approver:** (empty)
- Batch Number:** (empty)
- CheckLink:** (empty)
- Comments:** Invoice from WF
- Company ID:** Fabrikam, Inc.
- Credit Card Name:** (empty)
- Credit Card Receipt Number:** (empty)
- Document Date:** 9/15/2016
- Document Number:** WS4567 - GLW
- Document Type:** Invoice
- Due Date:** (empty)
- File Name:** (empty)
- Freight Amount:** (empty)
- GL Distribution:** 2 code(s) selected
- Misc Charges Amount:** (empty)
- Posting Date:** (empty)
- Purchase Order Number:** (empty)
- Purchases Amount:** 1500.00
- Tax Amount:** (empty)
- Tax Schedule ID:** (empty)
- Trade Discount Amount:** (empty)
- Username:** Sean
- Vendor ID:** ADVANCED0001
- Voucher No.:** VCHR980001460
- WF_Status:** EnteredInERP

When a document row is selected or hovered over, from the list in the Search results, the document metadata displays in a pop-up window.

KwikTag Search Functions

As with other KwikTag features, functionality is accessed via right-click menus. Functionality that is unique to the search tab is identified in this section of the user guide.

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

Site: Choose all KwikTag sites, or a specific site to search for documents.

From: For searches based on a specific site, the from option allows users to search either 'All Drawers' or choose a specific drawer in the selected site.

Date Type: Choose the date type for your document search. Options 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. Options include last month, last year, past month, past year. If you select 'Date Range' enter a 'Start Date:' and 'End Date:'

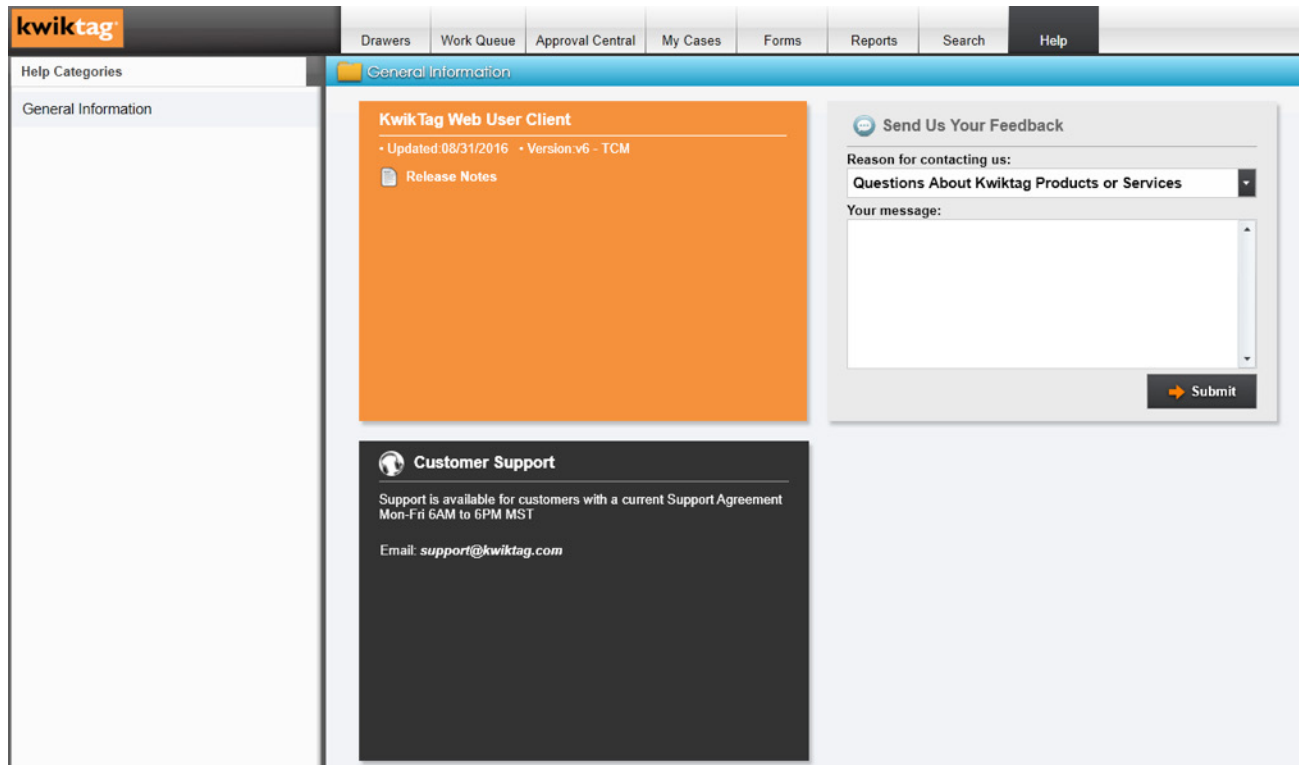
Start: (Date) Enter a start date for the date range search.

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

KwikTag Help

The KwikTag help tab provides access to documentation and other support resources.

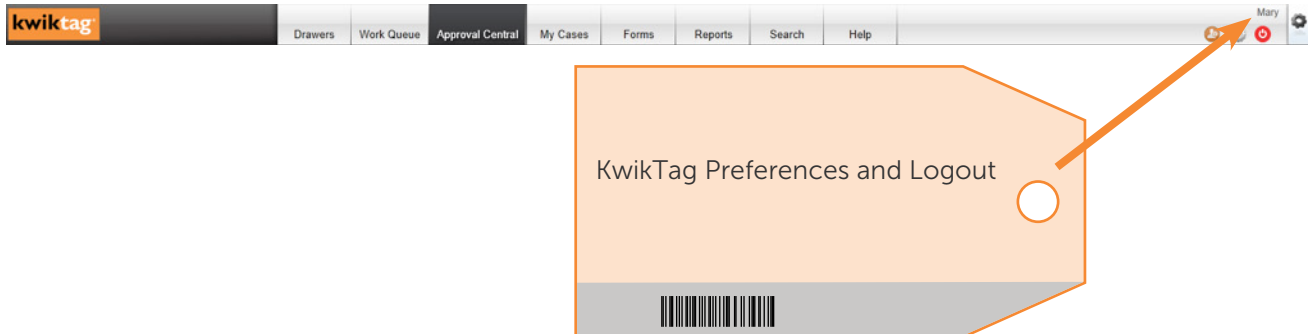
KwikTag support contact information is displayed, and users can submit feedback or help requests.



KwikTag Help provides general information including KwikTag version information, release notes and customer support contact information.

KwikTag Logout and Preferences

The KwikTag logout and preferences icons are displayed on the upper right-hand corner of the KwikTag interface. To logout, simply click the red logout icon.



KwikTag Preferences

Clicking the KwikTag preferences icon launches the KwikTag Preferences menu. From this menu, users can:

- Change settings for how KwikTag sites, drawers and documents are displayed
- Register their KwikTag barcode tags
- Update their KwikTag password

The KwikTag Settings Menu

My Preferences 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 range from 50 - 20,000 documents. The greater the number of documents pre-loaded, the more time will be required for the page to load.

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.

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. KwikTag will also register tags to you automatically if you use the new barcode in the drawers area.

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 number.

If you have any questions regarding the use of the KwikTag Web Client please contact your KwikTag Administrator or KwikTag support.

Support Hours: 6:00 AM - 6:00 PM Mountain Standard Time

Support Phone: 1-877-KWIK-111 (1-877-594-5111)

Support Email: support@imagetag.com

