

ImageQuest

Supplement Guide

Version 10.3



informa
software

Table of Contents

Requirements.....	5
Server Requirements	5
Client Requirements	5
OXPd Requirements.....	5
Installation	6
Installation Notes.....	6
Server Installation	6
Upgrading to 10.3	8
Client Installation	8
Silent Client Installations.....	9
ImageQuest Addons.....	9
Administration	10
SMTP Server	10
Manage Users and Roles.....	11
First name and Last name fields	11
Manage Document Types	12
Input Masks.....	12
Custom Input Masks (Text)	17
Metacharacters	17
Special Characters.....	17
Literal Characters	18
Examples	18
Custom Input Masks (Numeric/Integer)	19
End-User Capabilities	22
Examples	22
Manage File Storage	23
Configure IQfolder	24
Attribute Lookup Configuration.....	25

Configure IQmfp (OXPd)	29
Confirm Device Model Number and Firmware Versions	29
Load the OXPd Solutions Installer onto the device.....	30
Configure IIS for OXPd.....	34
Install OXPd onto the device.....	37
Destroy Deleted Documents.....	51
Document Destruction Rules	56
OCR Settings.....	64
Configure RightFax Connector	65
Database Configuration Utility.....	66
IQ Client Applications.....	67
Enhanced Date & Time Searching.....	67
IQscan.....	68
Automatic Document Type Selection	68
Indexing Queue Locked Column	68
Indexing Queue Print Button	69
Windows Explorer Connector	69
ImageQuest Assistant	70
Outlook Office Connector Enhancement.....	71
ImageQuest Office Connector	72
Routing Notification Enhancement.....	72

Requirements

Server Requirements

- P4 CPU or higher (Dual Core recommended)
- 2GB Memory (4GB Recommended)
- DVD Drive (if installing from disc)
- 170MB free hard drive space (for program files only)
- Windows Server 2003 R2 SP2, Windows Server 2008 SP2, Windows Server 2008 R2, Windows XP SP3, Windows Vista SP2, or Windows 7. (32-bit and 64-bit OS versions are supported, but ImageQuest 10.3 runs in 32-bit mode on 64-bit OS)
- If a software firewall product is running on the server, please ensure that TCP port 32751 and UDP port 2112 are open.
- Microsoft .NET Framework version 3.5
- IIS Server is required to configure WebIQ

Client Requirements

- P4 CPU or higher
- 70MB free hard drive space (for program files only)
- Microsoft .NET Framework 2.0
- Local administrative access is required to perform the initial client installation.
- Windows XP SP3, Windows Vista SP2, or Windows 7. (32-bit and 64-bit OS versions are supported, but ImageQuest 10.3 runs in 32-bit mode on 64-bit OS)
- Adobe Acrobat Reader 6.0 or higher
- Microsoft Office 2003, 2007 or 2010 (x86 only) is required for the ImageQuest Office Connector
- WebIQ Clients require Internet Explorer 6 or higher

OXPd Requirements (Required for HP MFP Integration)

- ImageQuest version 10.3 must be installed
- Supported HP device with the latest firmware
- Internet Information Service (IIS) must be installed on the ImageQuest Server

Installation

Installation Notes

- It is recommended that you backup your existing ImageQuest images folder, SQL database and WebServices directory prior to performing an upgrade. The WebServices directory can be located here:

C:\Program Files\Informa Software\ImageQuest\WebServices

Note: ATTRIBUTE LOOKUP CONFIGURATION DATA STORED IN THE WEBSERVICES FOLDER WILL BE DELETED WHEN UPGRADING TO 10.3! IT WILL NEED TO BE MANUALLY RECONFIGURED IN IQADMINISTRATOR AFTER THE UPGRADE IS COMPLETE!

- The IQ Application Service must be "Started" before performing a 10.1 or 10.2 to 10.3 upgrade.
- ImageQuest client machines must be upgraded to 10.3 after a 10.1 or 10.2 server upgrade.
- IIS must be installed and configured on the IQ server to use WebIQ.
- IIS must be installed and configured to install OXPd on an HP device which does not natively support OXPd.
- SQL server is no longer installed by the ImageQuest installer. There is an option in the Autorun program on the DVD to install SQL 2008 R2 Express if it's required.

Server Installation

To install or upgrade the ImageQuest server, run the autorun.exe program from the installation media. The autorun menu has several different installation options:

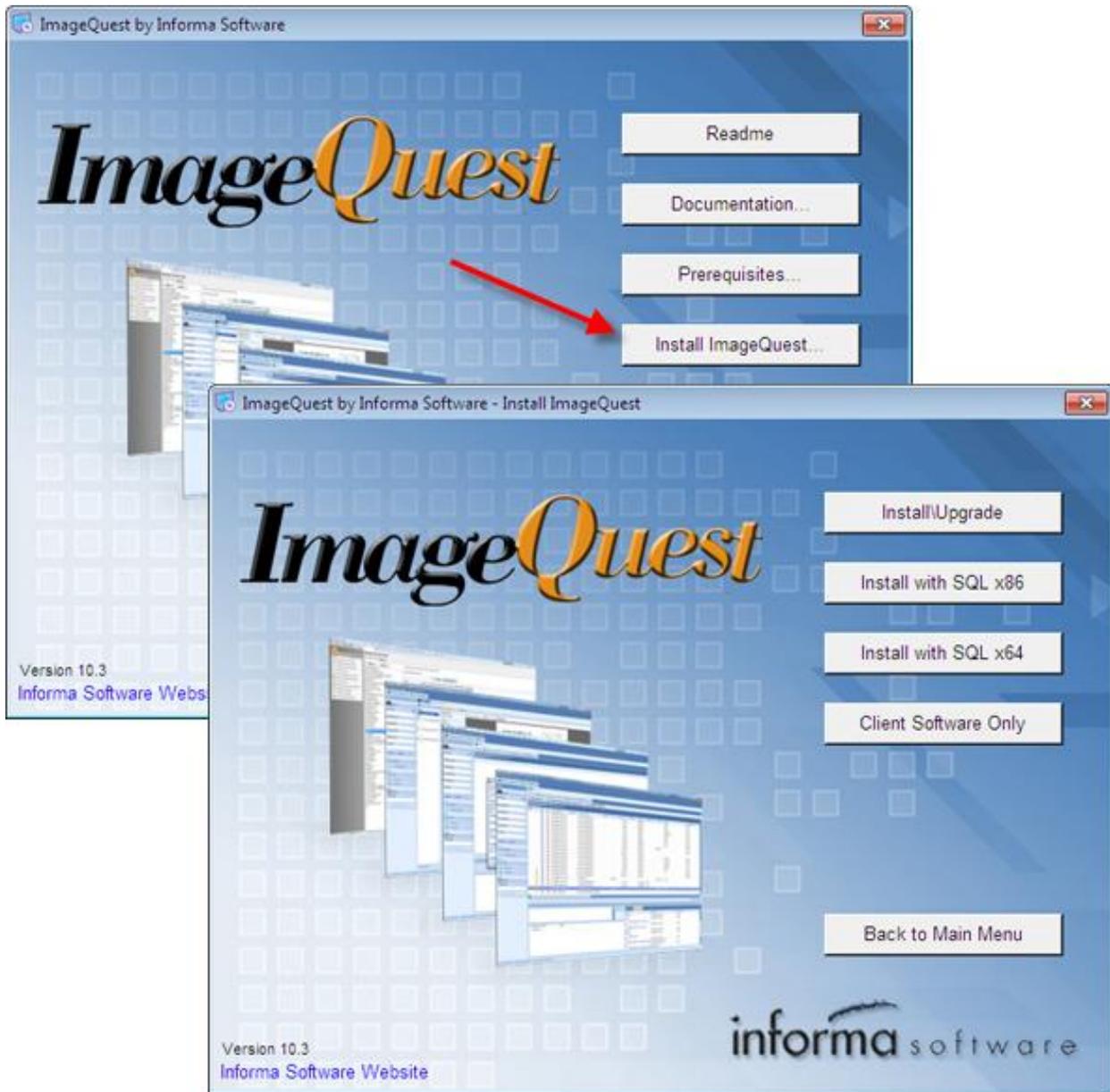
- Install\Upgrade IQmfp 10.1 or 10.2 to ImageQuest 10.3 using an existing SQL server in the organization
- Install ImageQuest 10.3 and SQL 2008 R2 Express x86 edition
- Install ImageQuest 10.3 and SQL 2008 R2 Express x64 edition

These options can all be found under the "Install ImageQuest..." button on the autorun home screen. If you opt to have the autorun install SQL 2008 R2 Express for you, please make sure the following prerequisites are installed prior to beginning the installation:

- Windows Installer 4.5
- Windows Powershell 1.0
- Microsoft .NET Framework 3.5

The prerequisites are also included on the installation media under the “Prerequisites...” button on the autorun home screen.

For advanced users, the prerequisites button also includes an option to install SQL 2008 R2 Express server separately. This is the standalone SQL installer and needs to be setup manually. If you choose to install SQL this way, please make sure to include the Full-Text Search option during the installation. Also make sure that the SQL Full-text Filter Daemon Launcher service is started before proceeding to the ImageQuest server installation.



Note: Microsoft SQL Server 2008 R2 Express Edition is limited to using 1 processor, 1GB of RAM and a 10GB Database.

Upgrading to 10.3

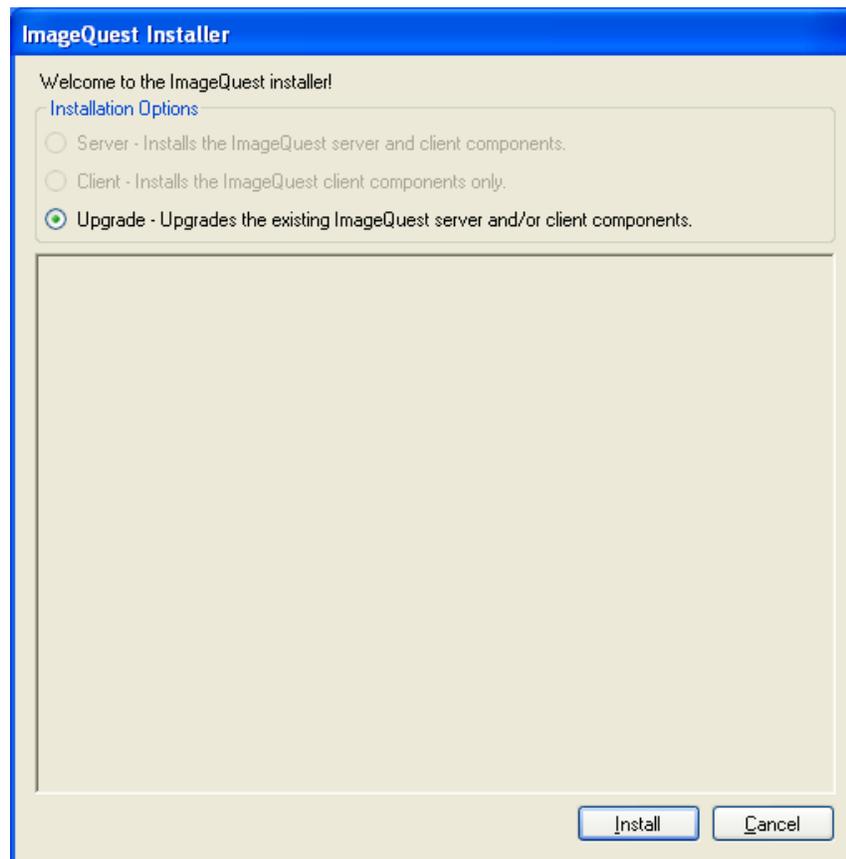
Version 10.3 can only upgrade ImageQuest versions 10.1 or 10.2. If you are running 10.0 or older, you will need to upgrade to an older version of ImageQuest before applying the 10.3 update. Please contact Informa Software support for assistance with obtaining an older version of the software.

To upgrade to version 10.3, click the “Install ImageQuest...” > “Install\Upgrade” buttons from the autorun program or run the setup.exe file from the root of the installation media. The installation program will automatically detect that you are upgrading from an older version and will upgrade all of the ImageQuest cabinets listed in the Warehouse.

Note: Do not run the server.msi file directly from the root directory. Only the main setup.exe file can be used to upgrade the server.

Client Installation

To install or upgrade the ImageQuest client, run the autorun.exe program from the installation media and click on the “Install ImageQuest...” > “Install\Upgrade” buttons. The setup program will automatically detect if this is an upgrade or not and if it is, the following window will appear:



For new client installations, you can use the “Install\Upgrade” button and then select the Client option, or you can use the “Client Software Only” button to specifically launch the client installation.

Silent Client Installations

The command line options for silent installs have changed since the previous versions. Please refer to the following example when configuring a silent installation scenario:

```
Msiexec /i client.msi /quiet
```

```
ADDLOCAL=IQDesktopFeature,IQAdminFeature,IQnotifyFeature,OfficeConnectorFeature,ExplorerConnectorFeature,IQPrinterFeature,IQscanFeature
```

ImageQuest Addons

The OpenText® Rightfax® Connector and the Cardiff® Teleform® Connector can be installed from the “ImageQuest Addons...” button of the autorun program.

The RightFax® Connector is installed on the ImageQuest server and will prompt you during installation to choose a cabinet to install into.

The Teleform® Connector needs to be installed on any machine that will commit data from Teleform® to ImageQuest. After the install is complete, the configuration file and Teleform® scripts will need to be installed manually.

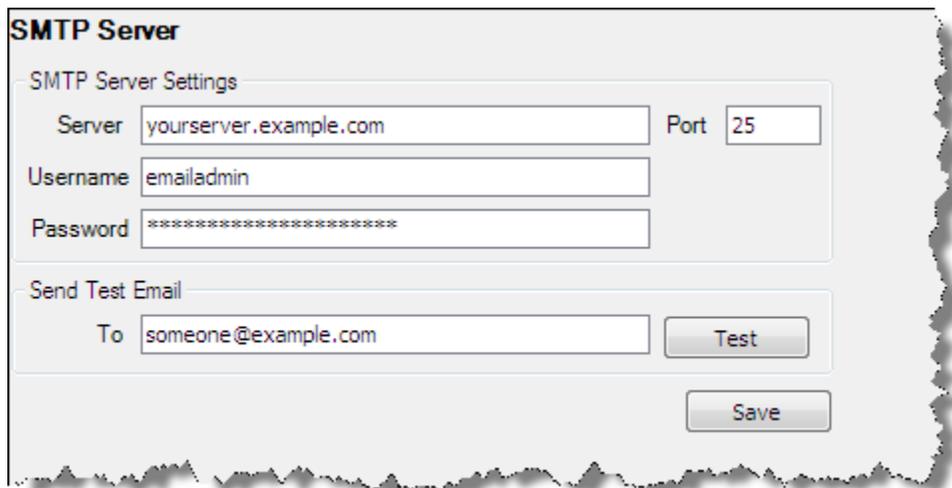
Note: The Rightfax® and Teleform® connectors must be licensed in order to function properly.

Administration

SMTP Server

The SMTP Server menu allows the administrator to configure the SMTP Server Settings for ImageQuest email routing notifications and send a test email to confirm the settings are valid.

This SMTP Server feature is available in IQadministrator under File > Manage Warehouse and has been removed from the web.config file where it was previously configured. The password is also now stored in the ImageQuest database and is also encrypted.



The screenshot shows a web-based configuration window titled "SMTP Server". It is divided into two main sections: "SMTP Server Settings" and "Send Test Email".

SMTP Server Settings:

- Server:** A text input field containing "yourservice.example.com".
- Port:** A small text input field containing "25".
- Username:** A text input field containing "emailadmin".
- Password:** A text input field filled with asterisks "*****".

Send Test Email:

- To:** A text input field containing "someone@example.com".
- Test:** A button next to the "To" field.
- Save:** A button located at the bottom right of the form.

Manage Users and Roles

First name and Last name fields

“First name” and “Last name” fields have been added to the “Manage Users” section of the Warehouse configuration and “Manage Users and Roles” section of the Cabinet configuration. The ImageQuest administrator can now include this information when adding or editing ImageQuest users. This information is also available in the user list grid and both columns can be sorted. In the example below, First name “John” and Last name “Smith” are entered for Username “jsmith”.

Manage Users and Roles

Add an existing user.

All users currently have access to the cabinet.

Create a new user.

Username

First name ←

Last name ←

Password

Confirm Password

Allow this user to authenticate with their Active Directory credentials.

Domain Name

Email Address

Send email notifications to this user.

Manage Document Types

Input Masks

Input Masks provide restricted data input as well as formatted data output. Masks can be used to ensure that end-users enter values only in a particular format. For instance, when indexing a phone number, an end-user needs to enter only digits, while hyphens and parentheses should be automatically skipped.

Manage Document Types now includes several pre-defined attribute masks for the following ImageQuest Attribute Data Types: Text, Numeric and Date & Time.

The pre-defined input masks for Text are “US Phone Number” and “Social Security Number”.

The pre-defined input mask for Numeric is “Currency”.

The pre-defined input masks for Date & Time are “Date Only” and “Date with Time”.

In the example below, the administrator creates a new Attribute called “Phone Number”, selects “Text” for the Data Type and “US Phone Number” from the Input Mask drop-down.

The screenshot shows the 'Add New Attribute' dialog box. The 'Attribute Name' field contains 'Phone Number'. Under 'Data Type', the 'Text' radio button is selected. The 'Description' field contains: 'Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros. Examples: 003-RBC0908, 123-456-7890, (407) 555-1212, 007'. In the 'Options' section, the 'Input Mask' dropdown menu is open, showing 'US Phone Number' as the selected option. Below the dropdown, there is a note: 'Select a built-in input mask to control the display format and validation of the data. See Admin Guide for further details.' There are also checkboxes for 'Required' and 'Include in filename', both of which are currently unchecked. At the bottom, there is a 'Test Area' with a text input field and a 'Test' button. The dialog box has 'OK' and 'Cancel' buttons at the bottom right.

The administrator then presses the tab key to move to “Test Area”. Note that the US Phone Number Input Mask is applied.

The screenshot shows the 'Add New Attribute' dialog box with the following details:

- Attribute Name:** Phone Number
- Data Type:** Text (selected)
- Description:** Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros. Examples: 003-RBC0908, 123-456-7890, (407) 555-1212, 007
- Options:**
 - Minimum Length: []
 - Maximum Length: []
 - Default: []
 - Input Mask: US Phone Number (dropdown)
 - Required:
 - Include in filename:
- Test Area:** Test some input for storage in this Data Type: () - [Test]

The administrator enters a test value “8774757778” and clicks “Test” to confirm the input passes validation. There is no need to enter the parentheses and hyphen characters as the mask provides them automatically. Also note that this type of mask only allows 10 numeric digits to be typed. All other keyboard characters will be ignored.

Add New Attribute

Attribute Name:

Data Type

Text
 Numeric
 List
 Integer
 Date & Time
 True/False

Description

Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros.
 Examples:
 003-RBC0908
 123-456-7890
 (407) 555-1212
 007

Options

Minimum Length:
 Maximum Length:
 Default:

Input Mask: ▼
 Select a built in mask or build your own to control the display format and user input of the data in this attribute. See Admin Guide for further details.

Required Include in filename

Test Area

Test some input for storage in this Data Type:

Passed

Click “OK” to save the attribute and add it to the main Attributes list.

The administrator can also create custom input masks for the Text, Integer and Numeric Data Types.

For example, perhaps an Invoice Number always begins with “INV-“ and is followed by 5 digits. The administrator wants to add an Attribute with an input mask that will automatically display the “INV-“ prefix and enforce the number of digits that can follow.

The administrator clicks “Add New Attribute”, enters “Invoice Number” for Attribute Name and selects Data Type “Text”.

For Input Mask, the administrator enters “INV-00000” and presses the Tab key. The input mask is displayed in the Test Area as “INV- ”.

Add New Attribute ✕

Attribute Name:

Data Type

Text
 Numeric
 List
 Integer
 Date & Time
 True/False

Description

Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros.
 Examples:
 003-RBC0908
 123-456-7890
 (407) 555-1212
 007

Options

Minimum Length:
 Maximum Length:
 Default:

Input Mask: ▼
 Select a built in mask or build your own to control the display format and user input of the data in this attribute. See Admin Guide for further details.

Required Include in filename

Test Area

Test some input for storage in this Data Type:

The administrator enters the value “12345” and clicks “Test” to confirm the input passes validation. Once again, the user will only need to type in the five digits as the “INV-“ will always be prefilled and cannot be deleted.

Add New Attribute

Attribute Name:

Data Type

Text
 Numeric
 List
 Integer
 Date & Time
 True/False

Description

Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros.
 Examples:
 003-RBC0908
 123-456-7890
 (407) 555-1212
 007

Options

Minimum Length:
 Maximum Length:
 Default:

Input Mask: ▼

Select a built in mask or build your own to control the display format and user input of the data in this attribute. See Admin Guide for further details.

Required Include in filename

Test Area

Test some input for storage in this Data Type:

Passed

Click “OK” to save the attribute and add it to the main Attributes list and the input mask will be displayed in the Input Mask column.

In addition to the predefined input masks that are provided, the administrator has the option to create custom input masks. See the tables on the following pages for descriptions and samples on how to do this.

Note: Input Masks are not supported in WebIQ.

Custom Input Masks (Text)

Metacharacters

Metacharacters are used to represent a range of symbols. An end-user can enter text only in the positions which correspond to metacharacters. When a metacharacter is found at a specific position in the mask an end-user can enter any character from the related range in this position in the edit box. The following table lists the available metacharacters:

Character	Meaning
L	An L character requires an alphabetic character in this position. For the U.S. this is A-Z, a-z.
l	An l character permits only an alphabetic character in this position, but doesn't require it.
A	An A character requires an alphanumeric character in this position. For the U.S. this is A-Z, a-z, 0-9.
a	An a character permits only an alphanumeric character in this position, but doesn't require it.
C	A C character requires an arbitrary character in this position.
c	A c character permits an arbitrary character in this position, but doesn't require it.
0	A 0 character requires a numeric character in this position.
9	A 9 character permits only a numeric character in this position, but doesn't require it.
#	A # character permits only a numeric character or a plus or minus sign in this position, but doesn't require it.

Special Characters

The following table lists the available special characters which are used to control the case of the input string and to represent various delimiters and currency symbols.

Character	Meaning
>	If a > character appears in the mask, all the characters that follow it are in uppercase until the end of the mask or until a < character is encountered.
<	If a < character appears in the mask, all the characters that follow it are in lowercase until the end of the mask or until a > character is encountered.
<>	If these two characters appear together in a mask, no case checking is performed and the data is formatted with the case used by the end-user during data entry.

/	A / character is used to separate the months, days, and years in dates. If the character that separates the months, days, and years is different in the regional settings of the system that the application runs on that character will be used instead.
:	A : character is used to separate the hours, minutes, and seconds in time values. If the character that separates the hours, minutes, and seconds is different in the regional settings of the system that the application runs on that character will be used instead.
\$	A \$ character is used to designate currency values. If the character that designates the currency values is different in the regional settings of the system that the application runs on that character is used instead.

Literal Characters

A character that is neither a metacharacter nor a special character is called a literal. Literals are inserted automatically as is into the edit box in their positions defined by the mask. An end-user has no need to enter literal characters. The cursor skips over them during editing.

The metacharacters and special characters can also appear as literal characters if they are preceded by a backslash (\).

Examples

1. A mask for entering a telephone number: **(000)000-00-00**.

Each '0' metacharacter in this mask requires a numeric character in the corresponding position. No characters can be omitted. The '-', '(', and ')' characters in the mask are literals.

The following are images of an editor that uses this mask:

(a value is not entered)

(a value is entered)

2. A mask for entering a telephone number with an optional area code: **(999)000-00-00**

Here the '9' metacharacter allows end-users to omit the area code part of a phone number.

(a valid phone number without a code part)

3. A mask for entering an alpha-numeric sequence: \A>LL-00

Here '\A' stands for the literal character 'A'. Since 'A' is used as a metacharacter the backslash must be used to make 'A' appear as a literal. The '>' command specifies that the following text should be in uppercase. The 'LL' substring indicates that two alphabetical characters should be inserted in this position. The '00' substring is a placeholder for two digits.

(a value is not entered)

(a value is entered)

Note: When a text input mask is enabled, any new attributes that are indexed will store the mask characters along with the data. Historical data that has already been indexed before the mask was created will have the mask applied when displaying the fields but the underlying data will remain unchanged.

Custom Input Masks (Numeric/Integer)

Numeric input masks are specifically designed for entering numeric values (integer, float values, currencies, percents, etc.). Specific numeric masks are dependent upon the current culture (regional) settings.

Input masks allow end-users to edit numeric values of common numeric types. A standard mask represents a string of the Axx form where A is a single alphabetic character (mask specifier), and xx is an optional integer called the precision specifier. The available mask specifiers are listed in the following tables. The precision specifier ranges from 0 to 99 and controls the number of significant digits or zeros to the right of the decimal point.

Input Mask Character	Name	Description	Samples Culture: English (USA)
C or c	Currency	<p>The mask for entering a currency amount. The input mask contains a value part which can be edited by an end-user, and a currency symbol which cannot be edited. The mask's format is determined by the current culture.</p> <p>The precision specifier indicates the desired number of decimal places. If the precision specifier is omitted, the precision will be set to 2.</p>	<div style="border: 1px solid black; padding: 2px; display: inline-block;">\$1,024.50</div> (EditMask = "c"; EditValue = 1024.5)
			<div style="border: 1px solid black; padding: 2px; display: inline-block;">\$20,010</div> (EditMask = "c0"; EditValue = 20010)

D or d	Decimal	<p>The mask for entering integer values of a fixed and flexible length.</p> <p>The precision specifier indicates the maximum number of digits that can be entered. If the precision specifier is equal to 0 or omitted, the length of the input string is not limited.</p> <p>If the editor's value is real, the fractional part of the value will be discarded during editing.</p>	<div style="border: 1px solid black; padding: 2px; text-align: right;">1501</div> <p>(EditMask = "d"; EditValue = 1501)</p>
F or f G or g	Fixed-point	<p>The mask for entering real numbers with a fixed-length fractional part.</p> <p>The precision specifier indicates the desired number of decimal places. If the precision specifier is omitted, the precision will be set to 2.</p>	<div style="border: 1px solid black; padding: 2px; text-align: right;">1024.50</div> <p>(EditMask = "f"; EditValue = 1024.5)</p>
N or n	Number	<p>The mask for entering the integers of real values. Thousand separators are inserted between each group of three digits to the left of the decimal point.</p> <p>The precision specifier indicates the desired number of decimal places. If the precision specifier is omitted, the precision will be set to 2.</p>	<div style="border: 1px solid black; padding: 2px; text-align: right;">1,024.50</div> <p>(EditMask = "n"; EditValue = 1024.5)</p>
P	Percent (mode 1)	<p>The mask for entering percents. The entered string is converted into a number "as is" (compare with the 'p' mask). So, if the "15 %" string is entered, the editor's value will be 15.</p> <p>The precision specifier indicates the desired number of decimal places. If the precision specifier is omitted, the precision will be set to 2.</p>	<div style="border: 1px solid black; padding: 2px; text-align: right;">25.00 %</div> <p>(EditMask = "P"; EditValue = 25)</p>
p	Percent (mode 2)	<p>The mask for entering percents. The entered string is converted to a number and then divided by 100. The result is used as the editor's value (compare with the 'p' mask). So, if the "15 %" string is entered the editor's value will be 0.15.</p> <p>The precision specifier indicates the desired number of decimal places. If the precision specifier is omitted, the precision will be set to 2.</p>	<div style="border: 1px solid black; padding: 2px; text-align: right;">25.00 %</div> <p>(EditMask = "p"; EditValue = 0.25)</p>

You can also use the following characters to create custom masks for editing numeric values.

Character	Name	Description
0	Zero placeholder	A decimal digit (0-9) can be entered in the corresponding position. Empty placeholders are represented by '0' characters. When the input string is converted to the editor's value, digits left empty are interpreted as zeros.
#	Digit placeholder	A decimal digit (0-9) can be entered in the corresponding position or left empty. Empty placeholders are not displayed. When the input string is converted to the editor's value, digits left empty are not stored in the result.
.	Decimal point	The first '.' character in the format string determines the location of the decimal separator in the formatted value. The actual character used as the decimal separator is determined by the current culture (regional) settings.
,	Thousand separator	If the ',' character appears in the mask, thousand separators will be inserted between each group of digits to the left of the decimal point as defined by the culture (regional) settings.
%	Percentage placeholder	If the '%' character appears in the mask, the value entered is divided by 100 when converted to the editor's value. So, if the '15 %' string is entered, the stored value will be '0.15'. The percent character used is dependent upon the current culture. An appropriate symbol is inserted in the edit box at the location where the '%' symbol appears in the mask.
%%	Percentage placeholder	If the '%%' string appears in the mask, the entered value is not divided by 100 when it's converted to the editor's value. So, if the '15 %' string is entered, the edit value will be '15'. The percent character used is dependent upon the current culture. An appropriate symbol is inserted in the edit box at the location where the '%' symbol appears in the mask.
\	Escape character	The character following the escape character is inserted into the edit box literally. To display a backslash in the edit box the mask should contain the '\\\ string.
;	Section separator	The ';' character is used to separate the masks for positive and negative values. The mask can contain two parts delimited by the ';' character. The first part defines the mask for entering positive values; the second part specifies a mask for entering negative values. An end-user can toggle the value's sign by pressing the '-' key. In this case, depending upon the value's sign, the value entered is automatically re-formatted using the appropriate mask. If the ";;" character is followed by an empty string, the editor will not allow end-users to enter negative values.
\$	Currency character	Defines the position of the currency symbol determined by the current culture.
Any other character	Literal character	Any other characters that appear in the mask are inserted into the edit box literally. To display special characters in the edit box literally, they should be preceded with the escape character ('\').

Note: If an editor's edit value is of the integer type, the editor only accepts integer values. An end-user will not be able to enter a fractional part of a number, even if it's allowed by the editor's mask

End-User Capabilities

Numeric masks allow end-users to enter numeric values only. Text cannot be edited in this mask mode.

- Pressing the '-' key changes the sign of the value being edited. The caret can be placed at any position within the edit box.
- Pressing the Up-Arrow and Down-Arrow keys increments or decrements the digit to the left of the caret's position. If the entire text is selected, pressing these keys increments or decrements the digit to the left of the decimal point.
- Scrolling the mouse wheel increments or decrements the digit to the left of the caret's position. If the entire text is selected, scrolling the mouse wheel increments or decrements the digit to the left of the decimal point.

Examples

The following are examples of custom numeric masks. See the table in the Predefined Masks sub-section for examples of predefined masks.

1. A mask for entering a real number which has a maximum of 4 digits to the left of the decimal point: **#,##0.00**

Groups of three digits will be separated using thousand separators. The fractional part of the value will always contain two digits.

(Stored Value = 3080.6)

(Stored Value = -3080.6)

2. The same mask for positive values. Negative values will be enclosed with double angle brackets: **#,##0.00;<<#,##0.00>>**

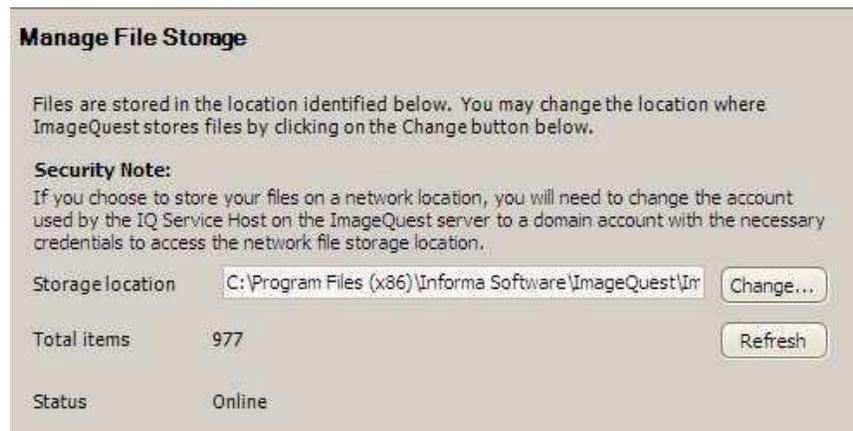
(Stored Value = -3080.6)

Note: When a numeric\integer input mask is enabled, any new attributes that are indexed will NOT store the mask characters along with the data. Historical data that has already been indexed before the mask was created will have the mask applied when displaying the fields but the underlying data will NOT remain unchanged.

Manage File Storage

Manage File Storage now displays the “Status” of the storage location and indicates whether it is Online (available) or Offline (not available). This can be helpful when troubleshooting issues with access to ImageQuest documents.

The Impersonation feature has been removed from Manage File Storage. Permissions are now controlled by the Logon account used by the “IQApplication Service Host” Windows service. For the Status to show as “Online” the Storage Location must be accessible from the ImageQuest server and the Service Account must have read\write access to the folder.



Manage File Storage

Files are stored in the location identified below. You may change the location where ImageQuest stores files by clicking on the Change button below.

Security Note:
If you choose to store your files on a network location, you will need to change the account used by the IQ Service Host on the ImageQuest server to a domain account with the necessary credentials to access the network file storage location.

Storage location	<input type="text" value="C:\Program Files (x86)\Informa Software\ImageQuest\In"/>	<input type="button" value="Change..."/>
Total items	977	<input type="button" value="Refresh"/>
Status	Online	

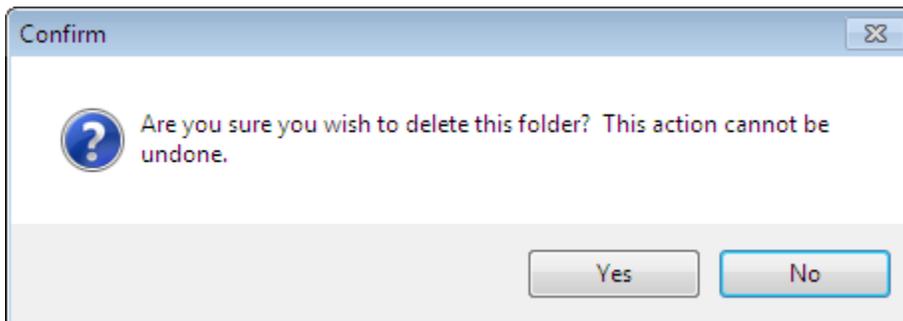
Configure IQfolder

“Configure IQfolder” has two new features: a new button to delete folders and the ability to manage the IQfolder Image Importing Service.

To delete a folder entry in Configure IQfolder, select the entry and click the X located at the right of the Role column.

Folder	User	Role	
c:\scans\admin	Administrator		X
c:\scans\HR Scans		HR	X
c:\scans\Accounting		Accounting	X
?	...		X

Confirm you wish to delete the folder by clicking “Yes” and the entry is removed from Configure IQfolder.



The Manage Service feature allows the ImageQuest Administrator to confirm the status of the IQfolder Image Importing Service and to Stop, Start and Restart the service as needed. Client machines can also manage the service remotely provided their Windows user account has permissions to start and stop services on the ImageQuest server.



Attribute Lookup Configuration

Attribute Lookup Configuration allows the ImageQuest administrator to configure and manage Attribute Lookup settings from IQadministrator. This was previously configured in the Web.Config file stored in the attribute lookup folder of the ImageQuest\WebServices directory.

Note: Any lookups that were previously configured before upgrading to version 10.3 will need to be reconfigured manually.

Attribute Lookup Configuration

Create a new lookup configuration... ▼

Select an attribute name to modify or test the current attribute lookup configuration.

Key Field:

ODBC Connection String

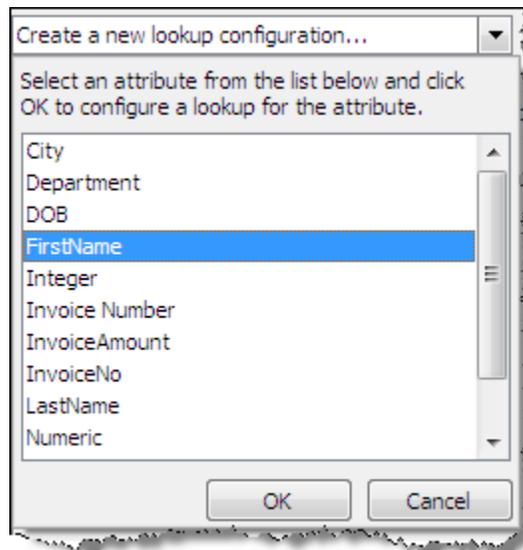
Query

Optional Field Mappings

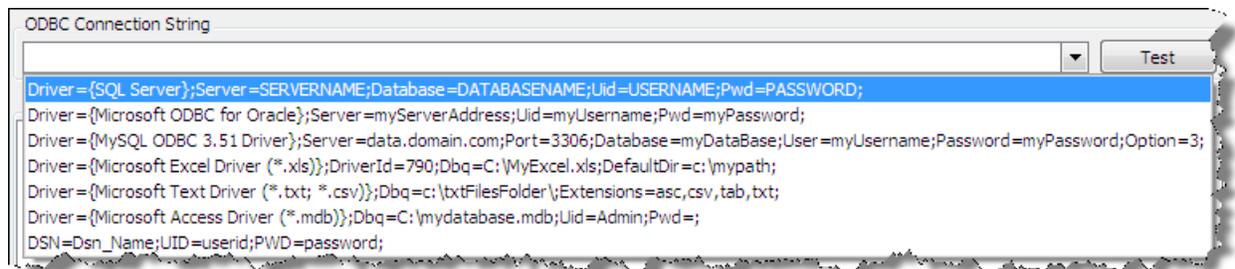
Source Field Name	Attribute
*	<input type="text"/>

Test Input

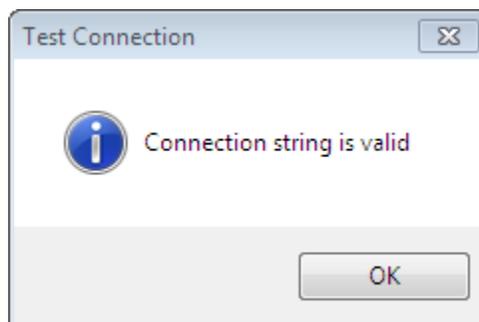
To create a new lookup, first select an ImageQuest Attribute to be used as the Keyfield. FirstName is selected in the example below. Click OK to continue and to configure the lookup.



Next, select an ODBC Connection String for the data source from the drop-down. The list provides some commonly used ODBC string templates that may be used. If you do not see an ODBC Connection string for your type of database, one can manually be typed in.



Configure the ODBC Connection String by providing the required parameters for the chosen connection string. Click "Test" to test the connection and confirm it is valid and then click OK to continue.



Enter the SQL query to be used by the Attribute Lookup to retrieve records from the data source. Click the “Insert Token” button to add the keyfield to the select statement in the proper syntax. In the example below, “[%FirstName%]” is added. The apostrophes are needed because the keyfield is a text value and the extra percent to the right is needed because of the LIKE operator.

The screenshot shows a window titled ".Query" containing the following SQL query:

```
SELECT FirstName, LastName, DepartmentName, SSN, SupervisorName FROM Employee WHERE
FirstName Like '%[%FirstName%]%'
```

The token `[%FirstName%]` is highlighted in blue. An "Insert Token" button is visible in the bottom right corner of the window.

The Optional Field Mappings section allows the ImageQuest administrator to map a data source column (Source Field Name) to an ImageQuest attribute (Attribute) if the names are not the same.

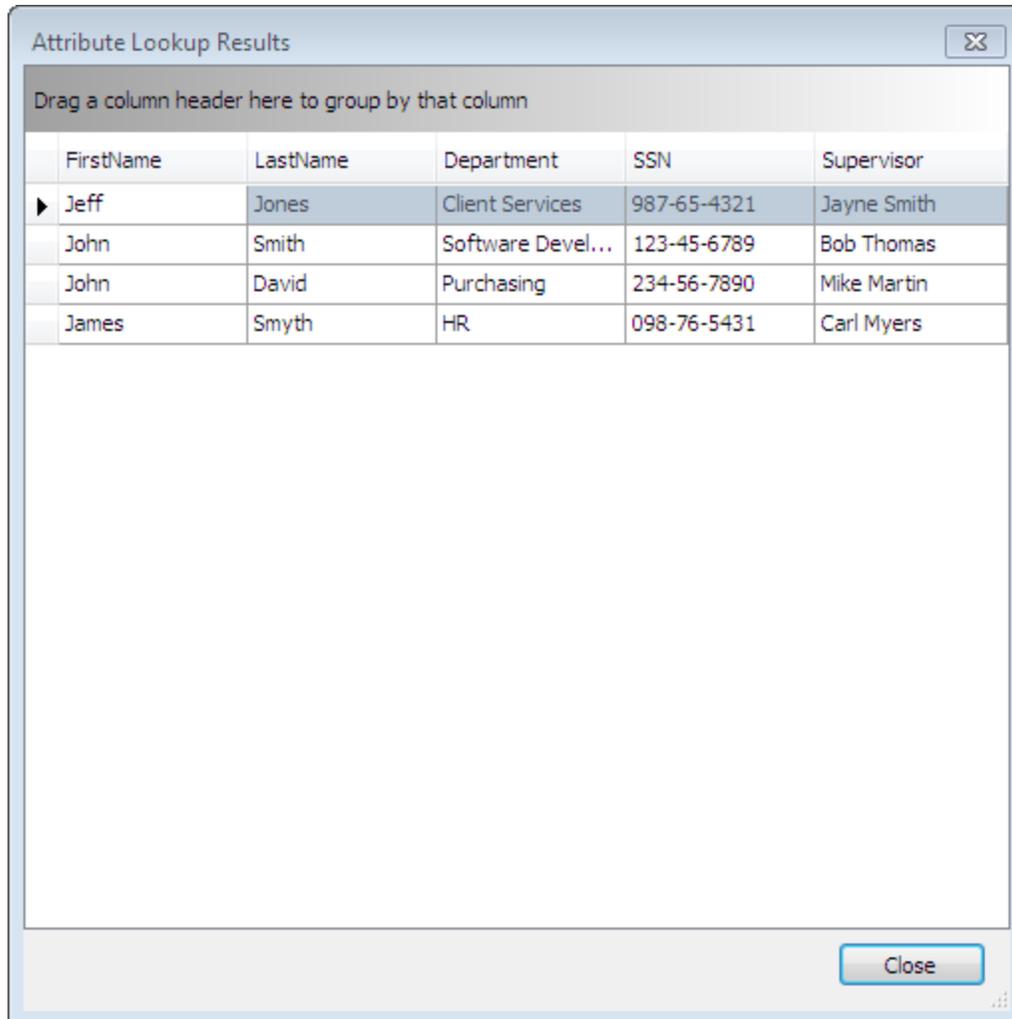
The screenshot shows a table titled "Optional Field Mappings" with the following data:

Source Field Name	Attribute	
DepartmentName	Department	X
SupervisorName	Supervisor	X
?		X

The Test Input section provides the option to test the Attribute Lookup configuration. In the example below, “j” is entered to lookup any FirstName that begins with the letter j. Click “Test” to perform the lookup.

The screenshot shows a window titled "Test Input" with a text input field containing the letter "j". To the right of the input field is a "Test" button.

The Attribute Lookup will perform the query on the source and provide a preview of the results. In this example, the lookup by letter “j” returns four unique records. Click Close to close the results window and click “Save” to save the Attribute Lookup Configuration.



The screenshot shows a window titled "Attribute Lookup Results" with a close button in the top right corner. Below the title bar is a grey instruction bar that says "Drag a column header here to group by that column". The main area contains a table with five columns: "FirstName", "LastName", "Department", "SSN", and "Supervisor". The first row is selected and highlighted in blue. Below the table is a large empty white space. At the bottom right of the window is a "Close" button.

FirstName	LastName	Department	SSN	Supervisor
Jeff	Jones	Client Services	987-65-4321	Jayne Smith
John	Smith	Software Devel...	123-45-6789	Bob Thomas
John	David	Purchasing	234-56-7890	Mike Martin
James	Smyth	HR	098-76-5431	Carl Myers

Configure IQmfp (OXPd)

“Configure IQmfp (OXPd)” replaces “Configure IQmfp” as the method for adding and managing ImageQuest on supported HP MFP Devices. **ALL HP MFPs MUST BE UPGRADED to OXPd in order to work with ImageQuest version 10.3.**

Before adding a new device, the OXPd Solution Installer must be installed on the device.

Confirm Device Model Number and Firmware Versions

Before installing OXPd, confirm the HP device supports OXPd and it is running at least the minimum firmware version required. The list below displays the supported devices and minimum required firmware versions.

MINIMUM MEMORY & FIRMWARE VERSIONS SUPPORTED:

The devices covered in this release include the following models:

- LJ M3035mfp series: 256MB, 48.101.4
- CLJ CM3530mfp series: 512MB, 53.031.4
- LJ 4345mfp series: 256MB, 09.151.3
- LJ M4345mfp series: 256MB, 48.101.4
- LJ M4349mfp series: 256MB, 48.101.4
- CLJ 4730mfp series: 256MB, 46.231.3
- CLJ CM4730mfp series: 384MB, 50.081.3
- LJ M5035mfp series: 256MB, 48.101.4
- CLJ CM6030mfp series: 512MB, 52.051.3
- CLJ CM6040mfp series: 512MB, 52.051.3
- CLJ CM6049mfp series: 512MB, 52.051.3
- LJ 9040mfp series: 256MB, 08.141.3
- LJ 9050mfp series: 256MB, 08.141.3
- LJ M9040mfp series: 384MB, 51.051.4
- LJ M9050mfp series: 384MB, 51.051.4
- LJ M9059mfp series: 384MB, 51.051.4
- DS 9200C: 256MB, 09.151.3
- DS 9250C: 256MB, 48.091.3
- CLJ 9500mfp series: 512MB, 08.141.3
- SJ 7000n: Natively Supported

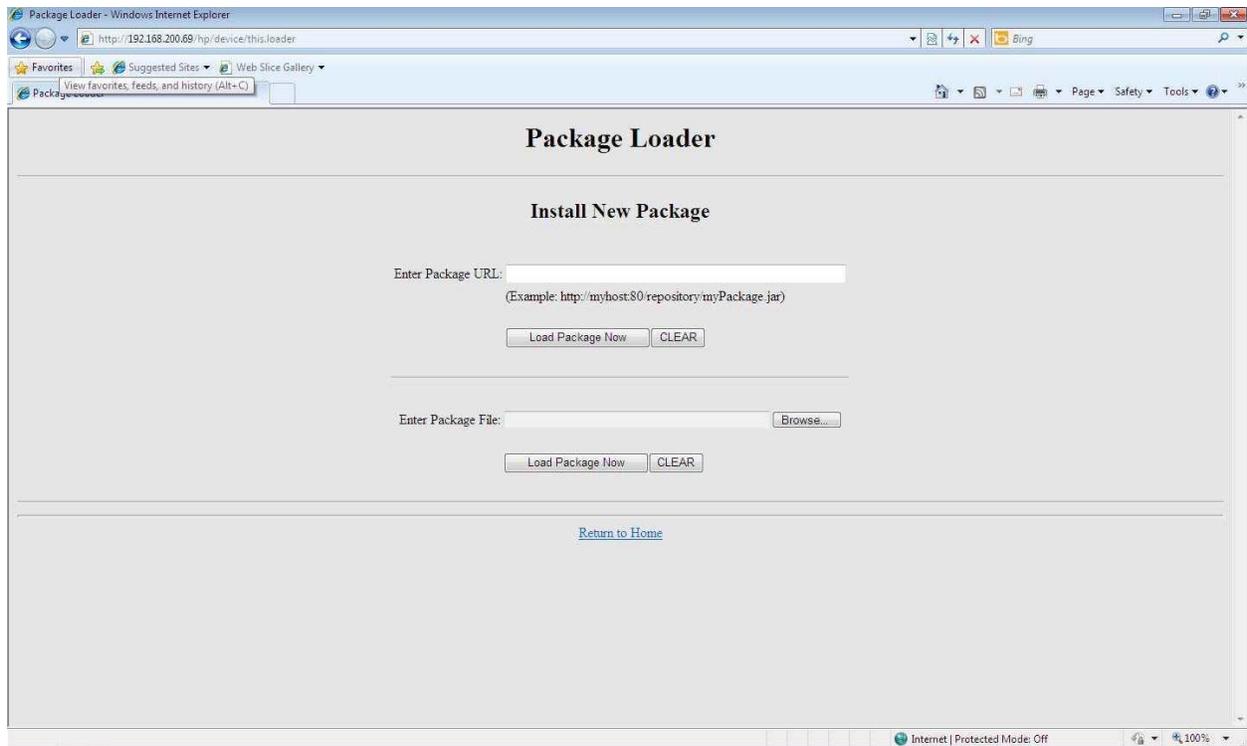
HP device firmware version can be retrieved from the device configuration page.

HP device firmware can be downloaded from <http://www.hp.com>.

Loading the OXPd Solutions Installer onto the device

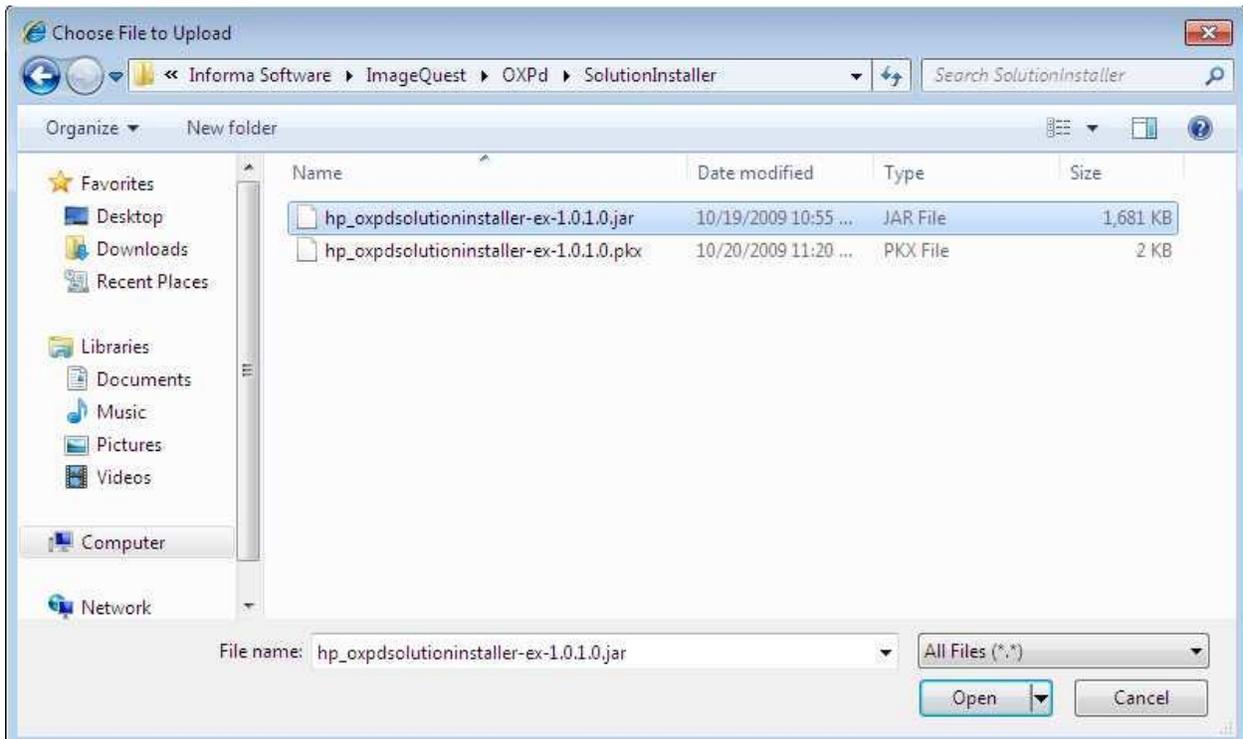
Browse to <http://<deviceIPaddress>/hp/device/this.loader> from the ImageQuest server to access the HP device Package Loader page. You will need to provide the device admin credentials to access the page.

Click the “Browse” of “Choose File” button and locate the OXPd Solution Installer jar file. This jar file is located in the Informa Software application directory on the ImageQuest Server.

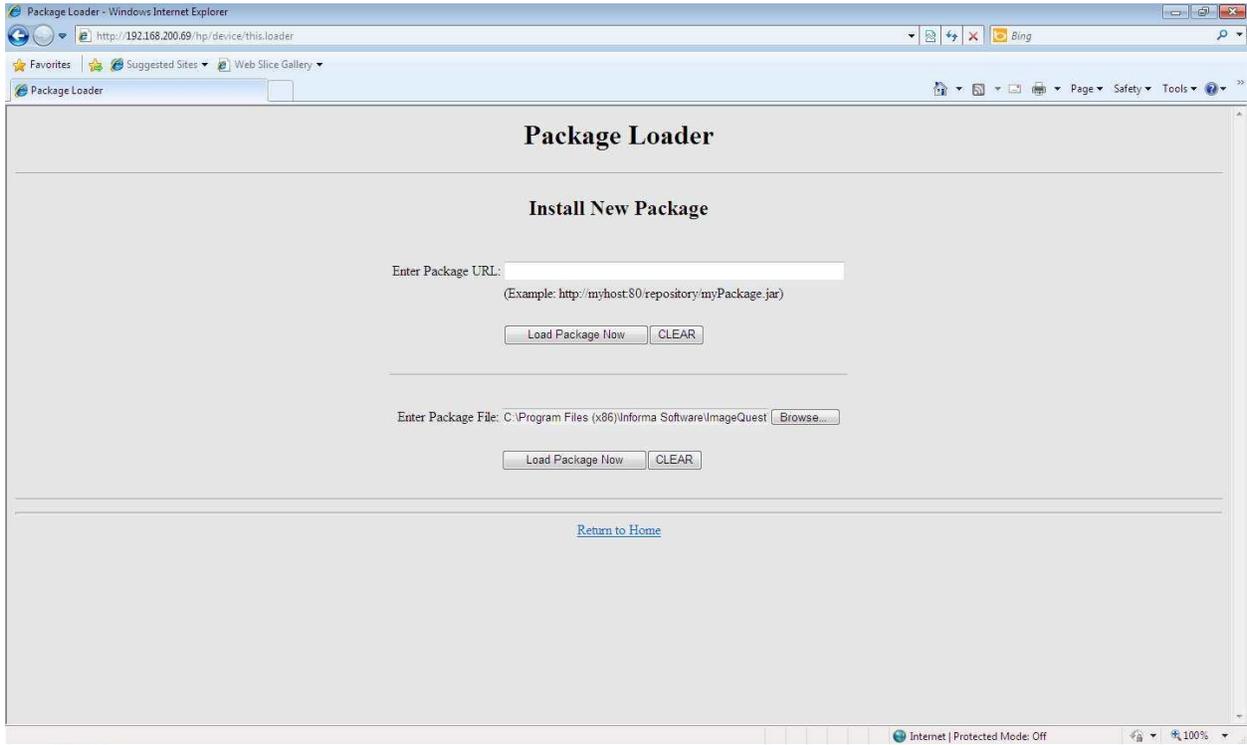


For example, if the ImageQuest Server was installed to C:\Program Files(x86)\Informa Software, the OXPd Solution Installer jar file would be located in C:\Program Files(x86)\Informa Software\ImageQuest\XPd\SolutionInstaller.

Select `hp_oxpdsolutioninstaller-ex-1.0.1.0.jar` and click “Open” as shown in the example below.

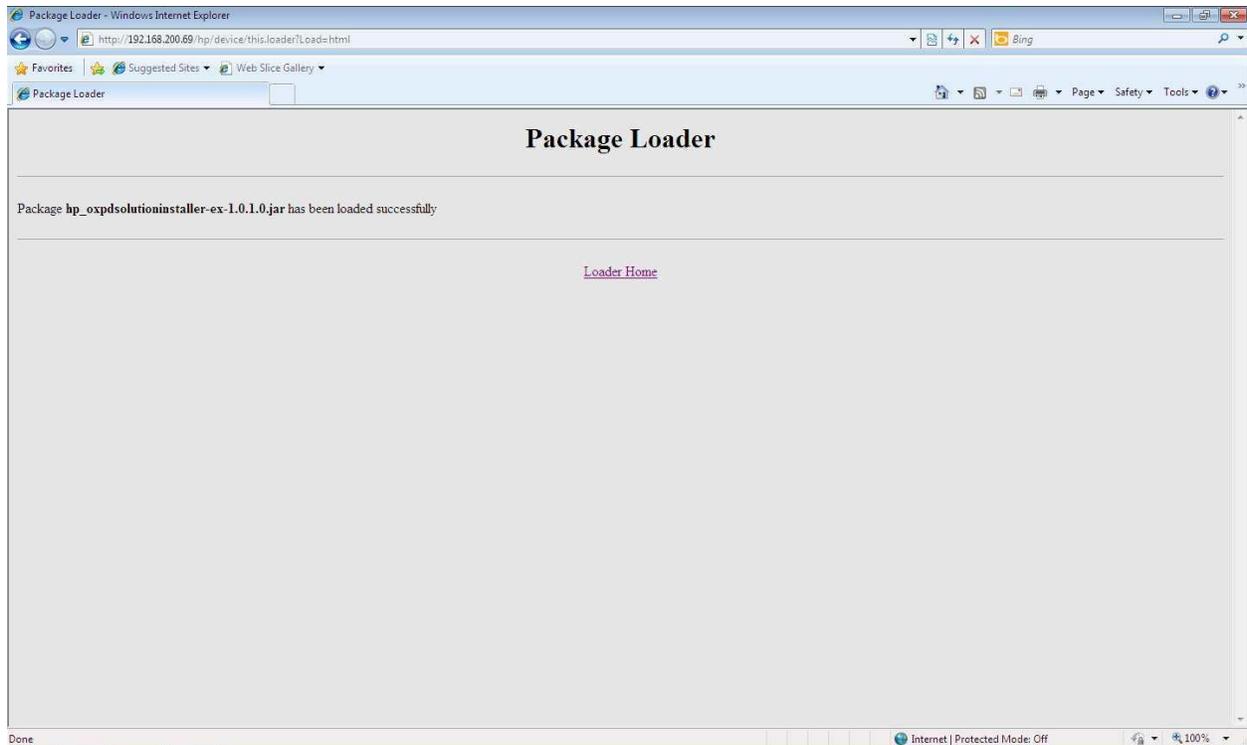


Click “Load Package Now” to load the jar file. It may take a few minutes to load.



The Package Loader page will confirm the jar file was loaded successfully.

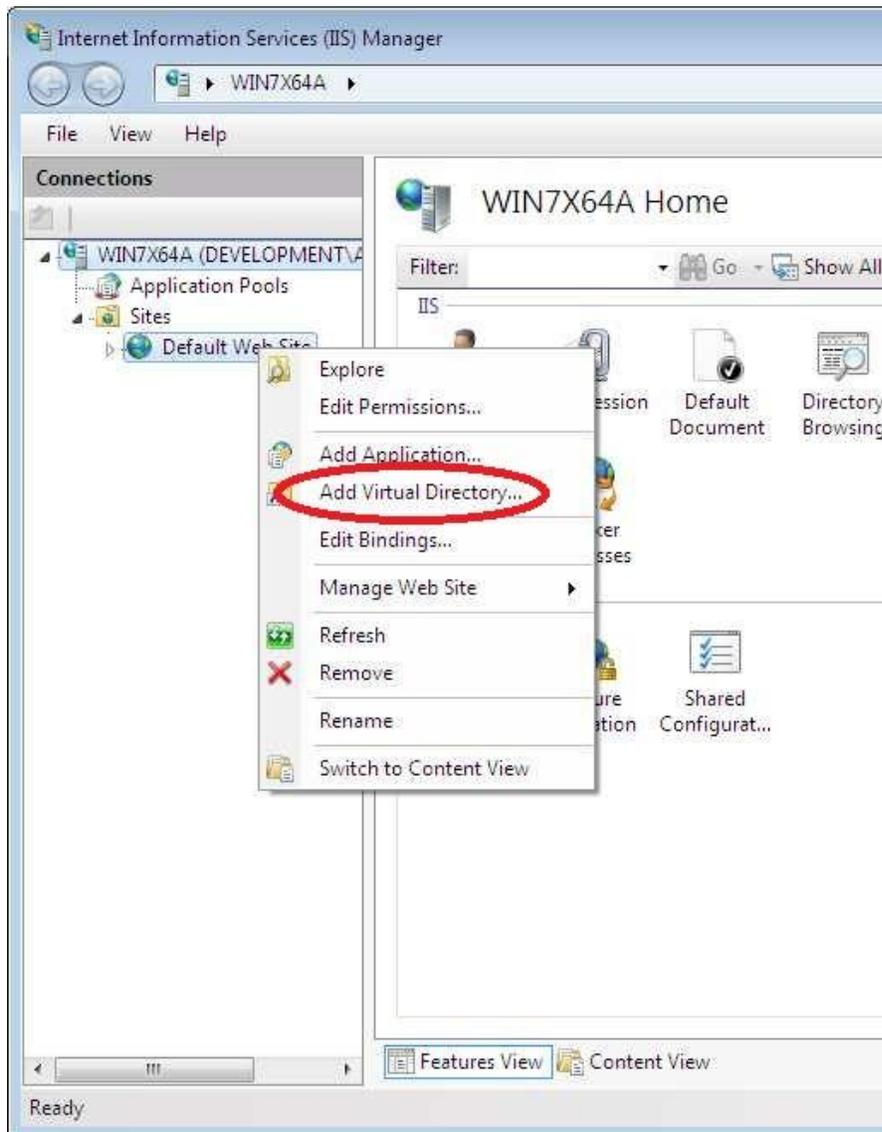
Close the device Package Loader page.



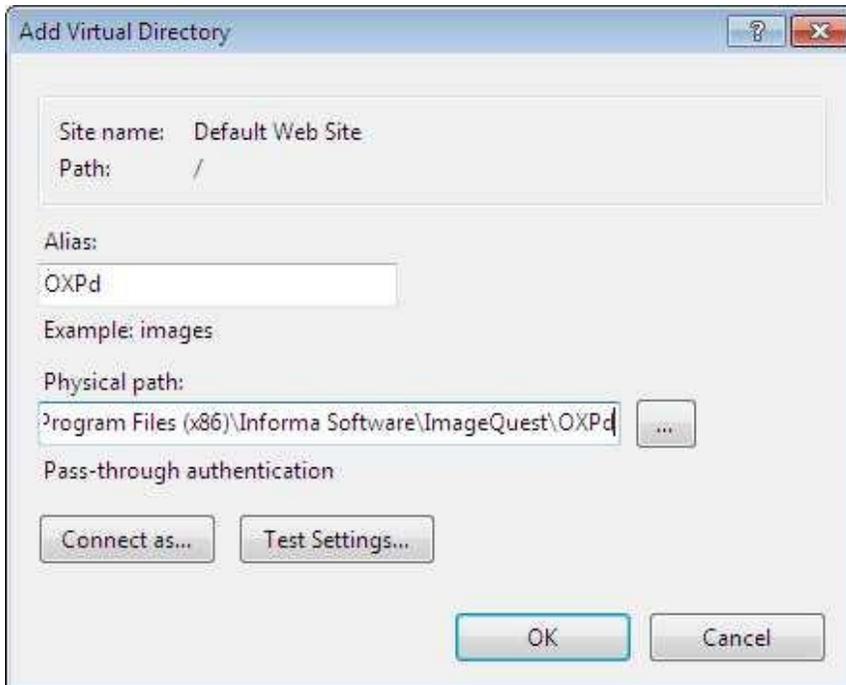
Configure IIS for OXPd

Internet Information Services (IIS) must be installed and configured for OXPd.

Open Internet Information Services (IIS) Manager on the ImageQuest server, expand Sites and right-click Default Web Site and select “Add Virtual Directory”.



In the Add Virtual Directory dialog, type “OXPd” for the Alias and browse to and use the Informa Software\ImageQuest\OXPd directory on the ImageQuest Server for the Physical path.

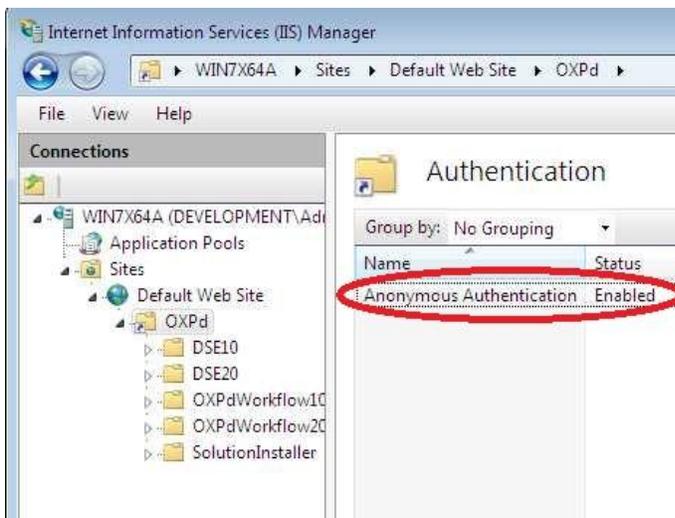


Click “OK” to close to save and add the new OXPd Virtual Directory.

Confirm “Anonymous Authentication” is “Enabled” for the OXPd Virtual Directory by selecting OXPd and double-clicking “Authentication” to view the Status.

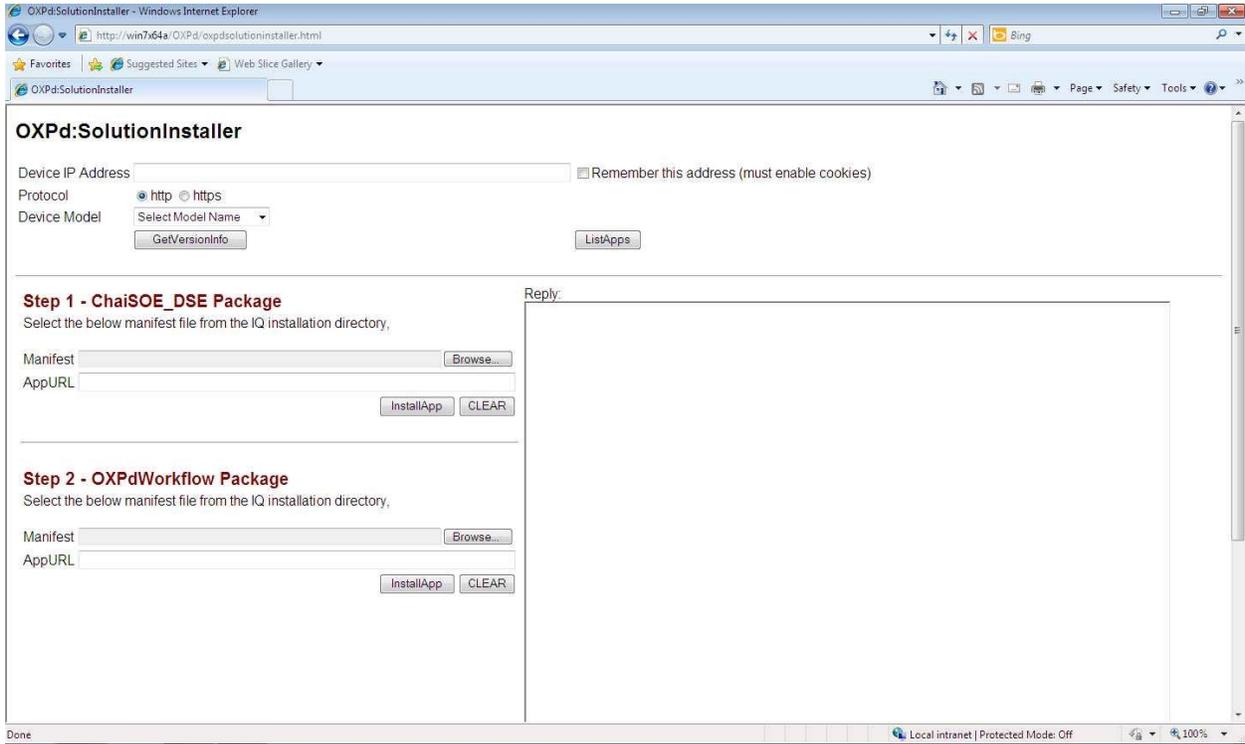


If “Disabled”, right-click Anonymous Authentication and select “Enable”.



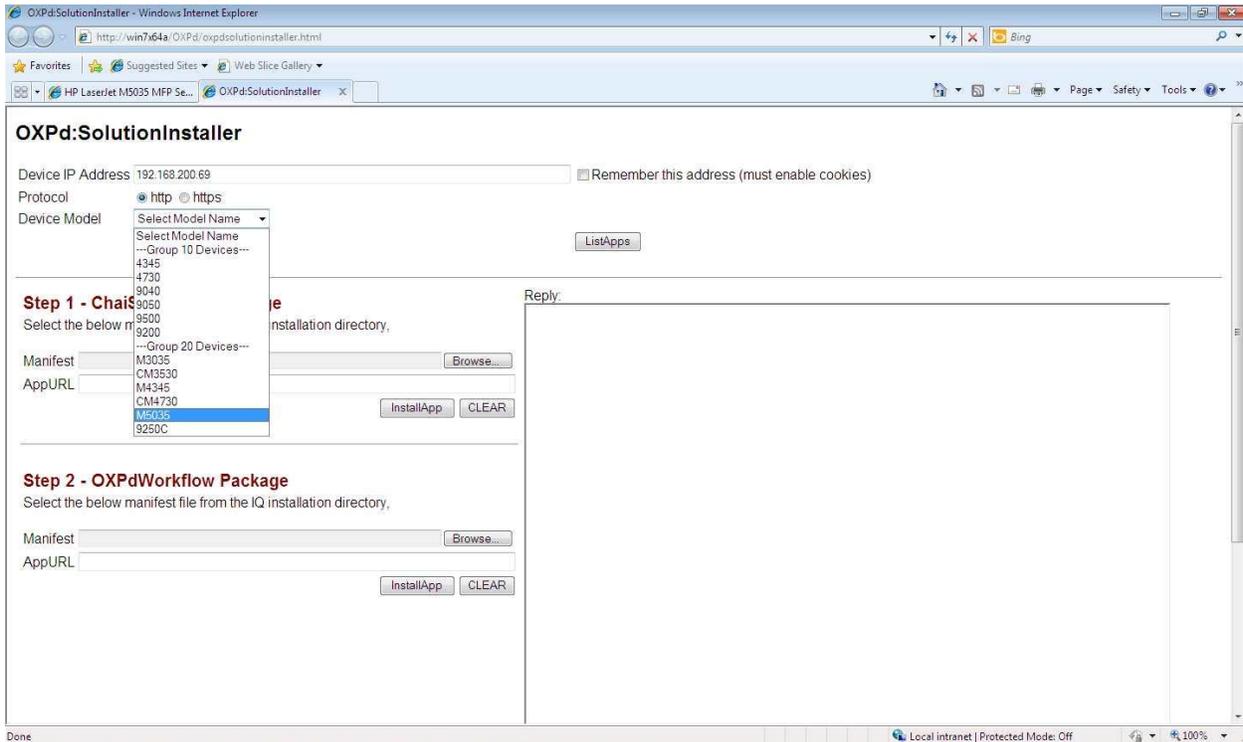
Install OXPd onto the device

Open the following in a browser: <http://<imagequestservername>/OXPd/oxpdsolutioninstaller.html> to load the OXPd SolutionInstaller page. Do not use “localhost” for the ImageQuest Server name.



Enter the device IP address in the “Device IP Address” field, select either http or https for “Protocol” and select the HP device model number from the “Device Model” drop-down.

In the example below, “192.168.200.69” is used for Device IP Address, Protocol is “http” and the “M5035” is selected from the Device Model drop-down.



OXPd:SolutionInstaller

Device IP Address

Protocol http https

Device Model

For **Step 1**, click “Browse” to locate the ChaiSOE_DSE Package manifest. This manifest is located in the Informa Software application directory on the ImageQuest Server.

There are three different ChaiSOE_DSE Package manifests available, DSE10, DSE20, or DSE30. When a Device Model is selected, the OXPd SolutionInstaller page will display the folder path above the “Manifest” field and includes the proper DSE folder for the selected device model. In the example below, the sample path is “C:\Program Files\Informa Software\ImageQuest\OXPd\DSE20\manifest.xml”.

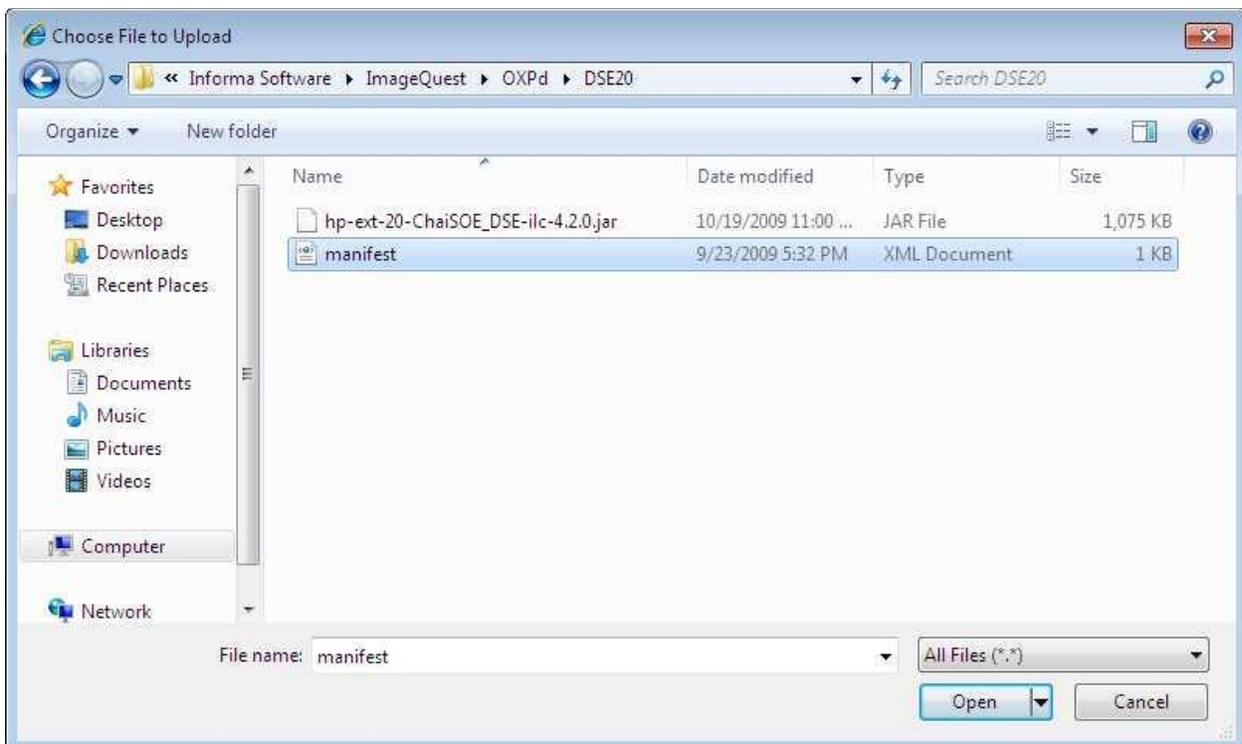
Step 1 - ChaiSOE_DSE Package

Select the below manifest file from the IQ installation directory,
 C:\Program Files\Informa Software\ImageQuest\OXPd\DSE20\manifest.xml

Manifest

AppURL

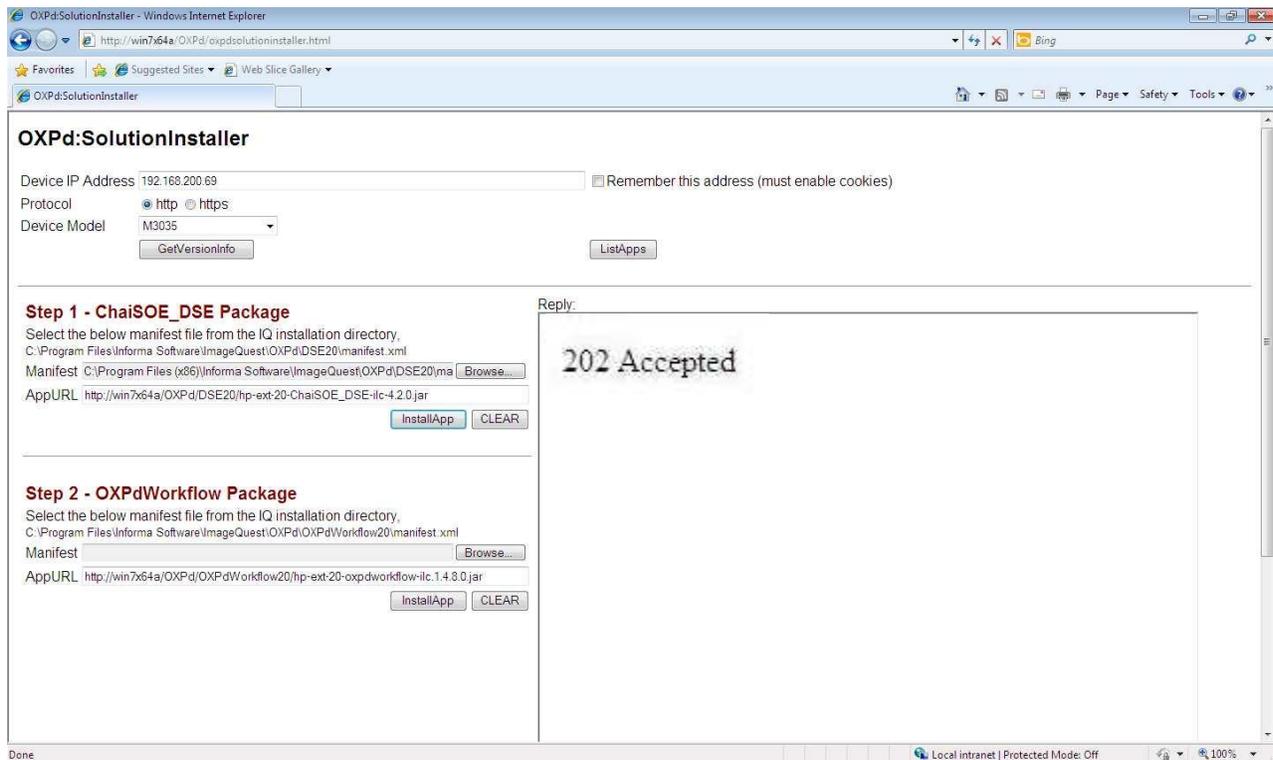
Browse to the proper file folder on the ImageQuest Server and click “Open” to select the manifest.



Click “InstallApp” to install the ChaiSOE_DSE package manifest. You may need to provide the HP device admin credentials to proceed.



The Reply box will display “202 Accepted” if the file upload was successful.



Verify the ChaiSOE_DSE Package manifest loaded successfully by clicking the “ListApps” button above the Reply field and confirm the “loadStatus” for the ChaiSOE_DSE “appURL” is “Loaded”.

Reply:

```
<?xml version="1.0" encoding="UTF-8" ?>
- <appList xmlns:xs="http://www.w3.org/2001/XMLSchema-instance" version="1.0">
  - <appListEntry>
    - <manifest version="1.0">
      - <appInfo>
        <appID>556cdf25-474c-4f7e-9de7-cb26e322a49b</appID>
        <appName>Chai Digital Send Enablers - V 4.2.0</appName>
      </appInfo>
      <configParamSettable>false</configParamSettable>
      <licenseParamSettable>false</licenseParamSettable>
    - <exclusionList>
      - <appInfo>
        <appID>2d86b1a5-446f-4887-baeb-4a7d85704c45</appID>
        <appName>Chai Digital Send Enablers - V 4.1.0</appName>
      </appInfo>
    </exclusionList>
    </manifest>
  - <status version="1.0">
    <appURL>http://win7x64a/OXPd/DSE20/hp-ext-20-ChaiSOE_DSE-ilc-4.2.0.jar</appURL>
    <loadStatus>Loaded</loadStatus>
    <configParamStatus>NotSet</configParamStatus>
    <licenseParamStatus>NotSet</licenseParamStatus>
    <runStatus>Normal</runStatus>
    <configStatus>NotApplicable</configStatus>
    <licenseStatus>NotApplicable</licenseStatus>
  </status>
</appListEntry>
- <appListEntry>
  - <manifest version="1.0">
    - <appInfo>
      <appID>d2d7177d-06c9-4789-8154-20e17ac55a1d</appID>
      <appName>OXPd:Workflow 1.4.8.0</appName>
    </appInfo>
    <configParamSettable>false</configParamSettable>
```

For **Step 2**, click “Browse” to locate the OXPdWorkflow Package manifest. This manifest is located in the Informa Software application directory on the ImageQuest Server.

There are three different OXPdWorkflow Package manifests available, OXPdWorkflow10, OXPdWorkflow20 or OXPdWorkflow40. When a Device Model is selected, the OXPd SolutionInstaller page will display the folder path above the “Manifest” field and includes the proper OXPdWorkflow folder for the selected device model. In the example below, the sample path is “C:\Program Files\Informa Software\ImageQuest\OXPd\ OXPdWorkflow20\manifest.xml”.

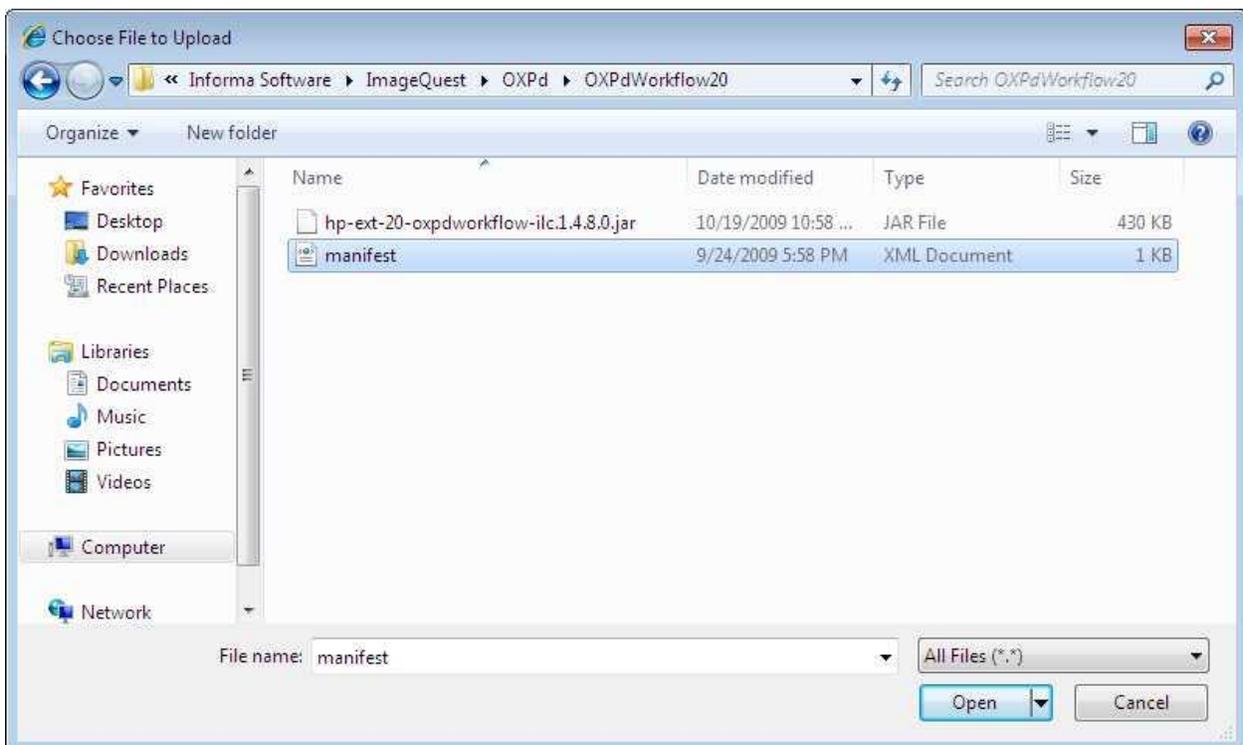
Step 2 - OXPdWorkflow Package

Select the below manifest file from the IQ installation directory,
 C:\Program Files\Informa Software\ImageQuest\OXPd\OXPdWorkflow20\manifest.xml

Manifest Browse...

AppURL

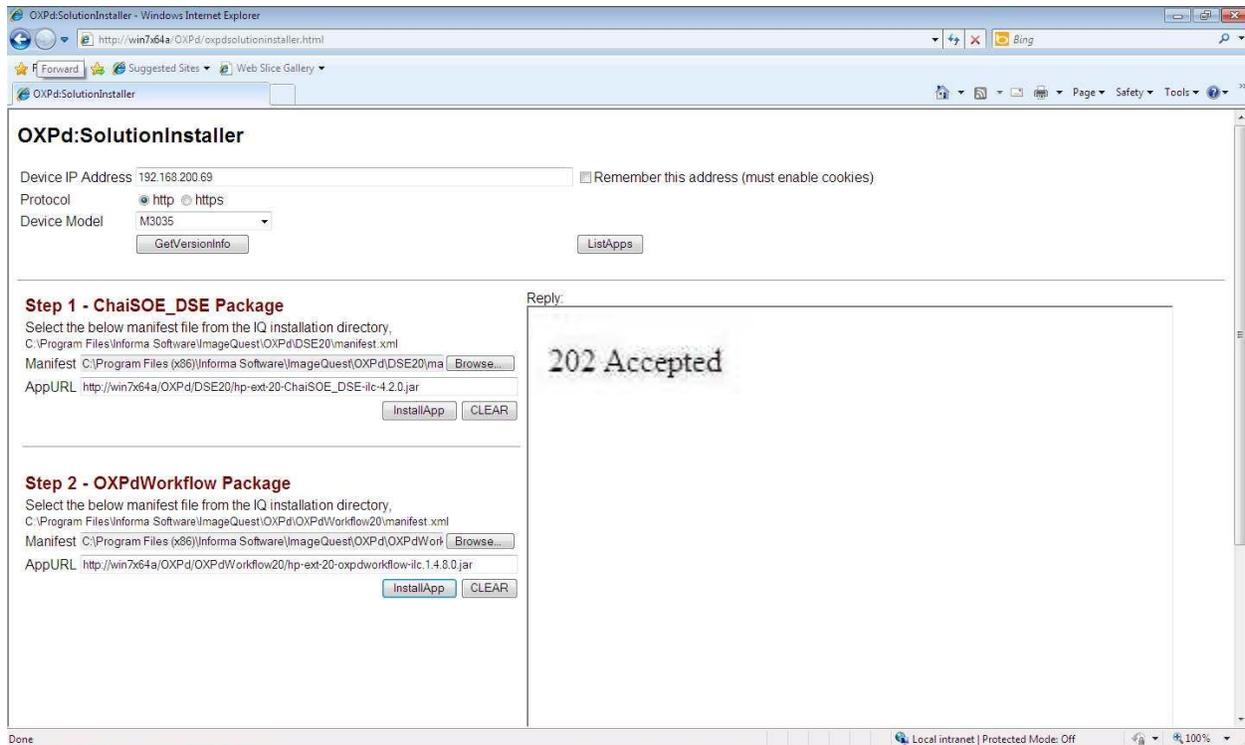
Browse to the proper file folder on the ImageQuest Server and click “Open” to select the manifest.



Click "InstallApp" to install the OXPdWorkflow Package manifest.



The Reply box will display "202 Accepted" if the file upload was successful.



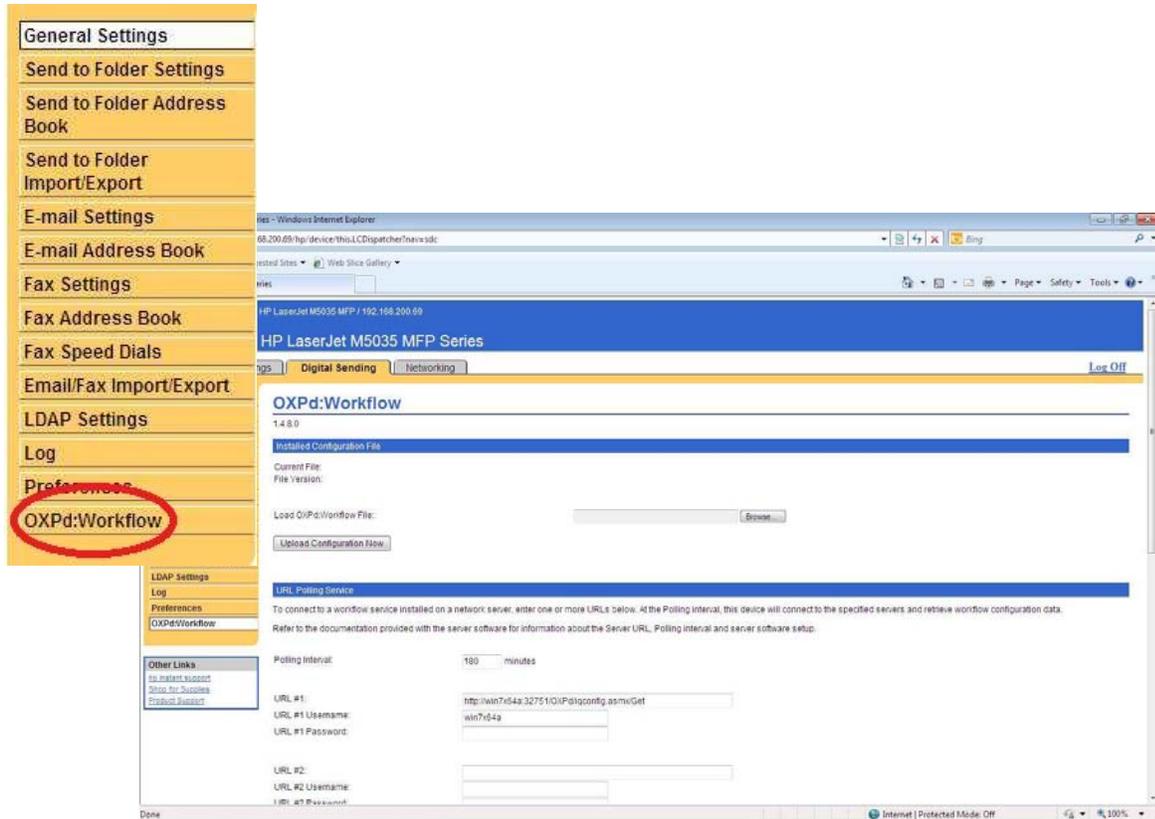
Verify the OXPdWorkflow Package manifest loaded successfully by clicking the “ListApps” button above the Reply field and confirm the “loadStatus” for the OXPdWorkflow20 “appURL” is “Loaded”.

```

- <appInfo>
  <appID>d2d7177d-06c9-4789-8154-20e17ac55a1d</appID>
  <appName>OXPd:Workflow 1.4.8.0</appName>
</appInfo>
<configParamSettable>false</configParamSettable>
<licenseParamSettable>false</licenseParamSettable>
- <inclusionList>
  - <appInfo>
    <appID>556cdf25-474c-4f7e-9de7-cb26e322a49b</appID>
    <appName>Chai Digital Send Enablers - V 4.2.0</appName>
  </appInfo>
</inclusionList>
- <exclusionList>
  - <appInfo>
    <appID>2d86b1a5-446f-4887-baeb-4a7d85704c45</appID>
    <appName>Chai Digital Send Enablers - V 4.1.0</appName>
  </appInfo>
  - <appInfo>
    <appID>3f165400-e7f3-11dd-ba2f-0800200c9a66</appID>
    <appName>OXPd:Workflow 1.4.6.0</appName>
  </appInfo>
</exclusionList>
</manifest>
- <status version="1.0">
  <appURL>http://win7x64a/OXPd/OXPdWorkflow20/hp-ext-20-oxpdworkflow-
  ilc.1.4.8.0.jar</appURL>
  <loadStatus>Loaded</loadStatus>
  <configParamStatus>NotSet</configParamStatus>
  <licenseParamStatus>NotSet</licenseParamStatus>
  <runStatus>Normal</runStatus>
  <configStatus>NotApplicable</configStatus>
  <licenseStatus>NotApplicable</licenseStatus>
</status>
</appListEntry>
</appList>

```

To confirm OXPd was successfully loaded onto the device, log into the device Embedded Web Server (EWS) click the “Digital Sending” tab and verify “OXPd:Workflow” is listed in the settings menu. Select “OXPd:Workflow” to view the current settings.



The device is now ready to be added to ImageQuest using Configure IQmfp (OXPd) in IQadministrator. Please make sure your device is licensed prior to adding it to ImageQuest.

Configure IQmfp (OXPd)

Select Device:

Display Name:

Hostname/Address: Use SSL

Model Name:

Serial Number:

IQ Server:

Page Orientation	Color	Page Size	Number of Sides
<input checked="" type="radio"/> Portrait	<input checked="" type="radio"/> B & W	<input checked="" type="radio"/> Letter	<input checked="" type="radio"/> Single
<input type="radio"/> Landscape	<input type="radio"/> Color	<input type="radio"/> Legal	<input type="radio"/> Double
		<input type="radio"/> A4	
		<input type="radio"/> Exec	
		<input type="radio"/> Ledger	

Device Users

All Users

Users in Role:

Click “New” to add a new device. The IQ Server field will be populated with the ImageQuest server information.

Enter the Display Name and Host Name/IP Address for the new device. In the example below, “M5035” is used for Display Name and IP address “192.168.200.69” is used for Hostname/Address. Press the Tab key to connect to the Mfp device.

Configure IQmfp (OXPd)

Select Device: M5035

Display Name: M5035

Hostname/Address: 192.168.200.69 Use SSL

Model Name:

Serial Number:

IQ Server: http://win7x64b.development.com:32751/

Page Orientation: Portrait Landscape

Color: B & W Color

Page Size: Letter Legal A4 Exec Ledger

Number of Sides: Single Double

Device Users

All Users

If the connection is successful, the MFP device Model Name and Serial Number will be populated as shown below.

The administrator can then select the default settings for Page Orientation, Color, Page Size and Number of Sides.

Configure IQmfp (OXPd)

Select Device:

Display Name:

Hostname/Address: Use SSL

Model Name: HP LaserJet M5035 MFP

Serial Number: CNBXB02422

IQ Server:

Page Orientation	Color	Page Size	Number of Sides
<input checked="" type="radio"/> Portrait <input type="radio"/> Landscape	<input checked="" type="radio"/> B & W <input type="radio"/> Color	<input checked="" type="radio"/> Letter <input type="radio"/> Legal <input type="radio"/> A4 <input type="radio"/> Exec <input type="radio"/> Ledger	<input checked="" type="radio"/> Single <input type="radio"/> Double

Device Users

All Users

The “Device Users” section allows the administrator to determine which ImageQuest users or role users will be added to the user list on the device. Check “All Users” if all ImageQuest users should be added. Uncheck “All Users” to activate and select from the “Users in Role” drop-down.

Configure IQmfp (XPd)

Select Device: M5035 New Remove Save

Display Name: M5035

Hostname/Address: 192.168.200.69 Use SSL

Model Name: HP LaserJet M5035 MFP

Serial Number: CNBXB02422

IQ Server: http://win7x64b.development.com:32751/

Page Orientation
 Portrait
 Landscape

Color
 B & W
 Color

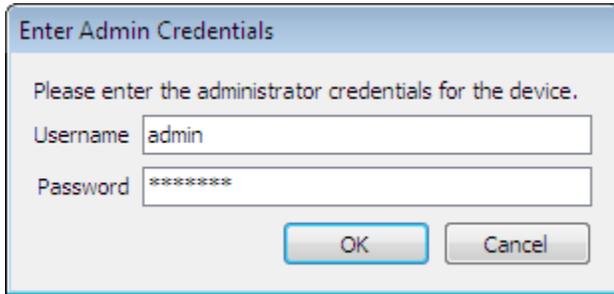
Page Size
 Letter
 Legal
 A4
 Exec
 Ledger

Number of Sides
 Single
 Double

Device Users
 All Users

Accounting
HR
MFP Users
MIS

Click “Save” to add IQmfp to the Mfp device front panel. You will be prompted to provide the device administrator credentials before the process can complete.



The dialog box titled "Enter Admin Credentials" contains the following text and fields:

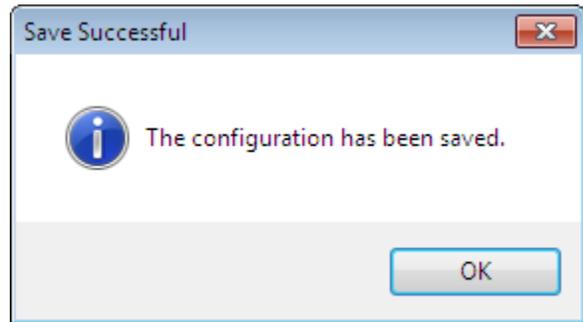
Please enter the administrator credentials for the device.

Username

Password

Buttons: OK, Cancel

The following message confirms the device was added successfully.



Destroy Deleted Documents

Prior to ImageQuest version 10.3, documents could only be flagged as Deleted, but this did not remove the database record or delete the physical file from disk. ImageQuest 10.3 introduces two new features: Document Destruction Rules and Destroy Deleted Documents, which allow documents and related data to be permanently “destroyed”. When document destruction is performed on a group of documents, the documents and document data are physically and permanently destroyed. Destroyed documents can no longer be accessed in ImageQuest and also cannot be restored.

Destroy Deleted Documents allows the administrator to permanently destroy all or certain documents that have been flagged as “Deleted” in ImageQuest.

Destroy Deleted Documents

Destroying deleted documents will permanently destroy all documents that have been marked as deleted in the system according to the criteria specified below. This cannot be undone and will result in permanent data loss. Please ensure that all documents marked as deleted which meet the criteria specified here can be safely destroyed before taking this action.

Choose an option

Destroy deleted documents that were created Days ago.

Destroy all deleted documents in the system.

Rule execution history

RunDateTime	Rule	Username	Results

History entry details

RunDateTime:

Rule:

Username:

Details:

Results:

The “Choose an option” section allows the administrator to determine which deleted documents can be destroyed: documents created a certain number or Days\Years ago or all deleted documents in the ImageQuest system.

The “Destroy deleted documents that were created... ago.” option is based on the ImageQuest “CreateDateTime” system attribute assigned to a document. The administrator can change the numeric value and select “Days” or “Years” so the ImageQuest system will know how far back to search for Deleted documents.

In the example below, the administrator wants to destroy all deleted documents that were created 7 days ago. The administrator selects the “Destroy deleted documents that were created... ago” option, enters “7” in the numeric field and selects “Days” from the drop-down.

The administrator can then click “Preview” to open the “Preview Documents” window to see all the documents flagged as deleted that meet the criteria. The example on the following page displays 7 documents. At this point, the administrator has a few different options:

“Destroy All” will permanently destroy all the documents displayed in the grid.

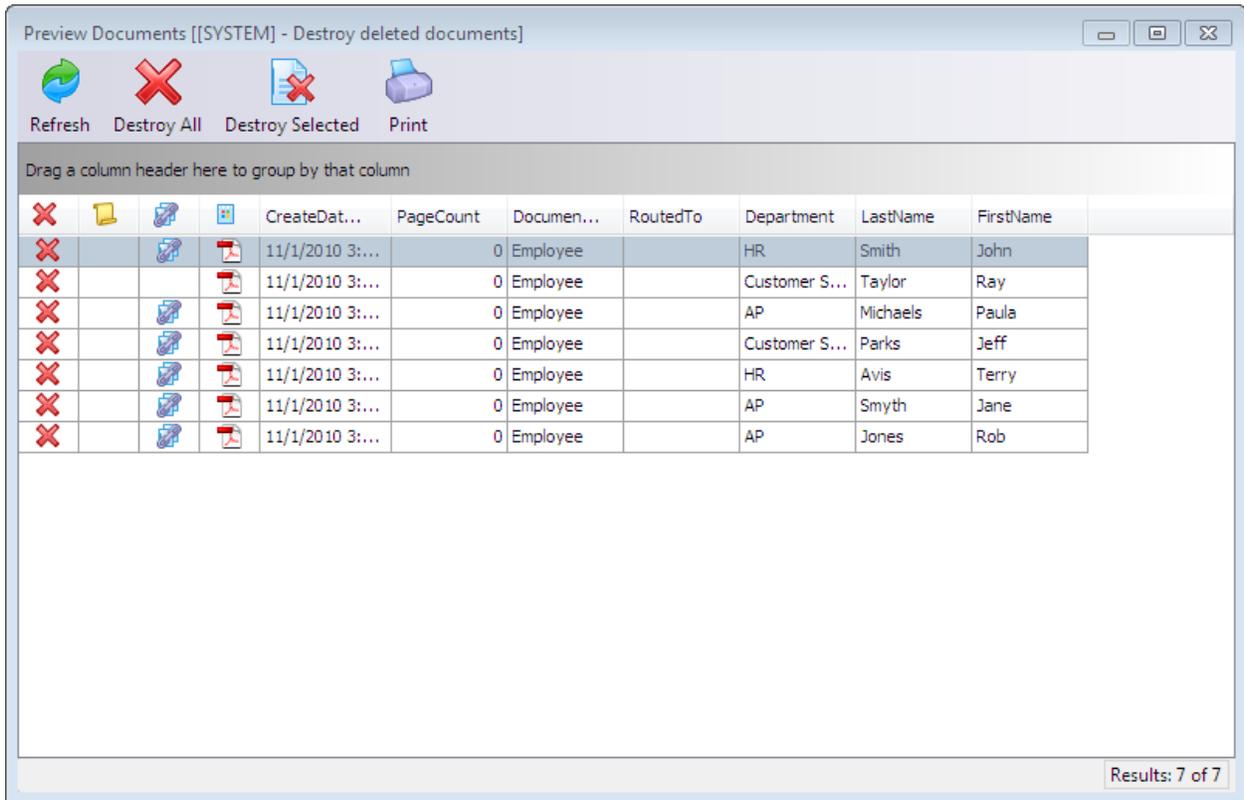
“Destroy Selected” will permanently destroy only the documents highlighted (selected) in the grid. The administrator can hold down the CTRL key to select multiple documents.

The “Refresh” button refreshes the current display.

The “Print” button allows the administrator to print the grid if needed.

Clicking “x” will close the Preview Documents window and will not destroy any documents.

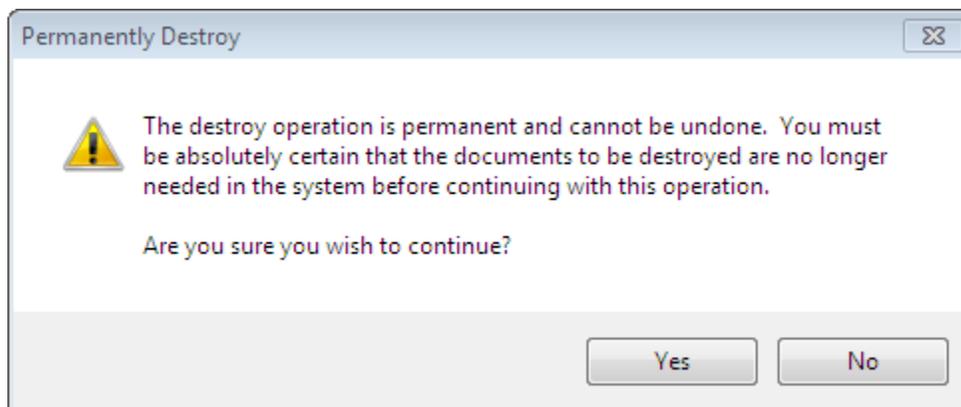
For this example, the administrator will select “Destroy All”.



When the administrator selects “Destroy All” or “Destroy Selected”, the message below is displayed. Click “Yes” to continue and perform the operation.

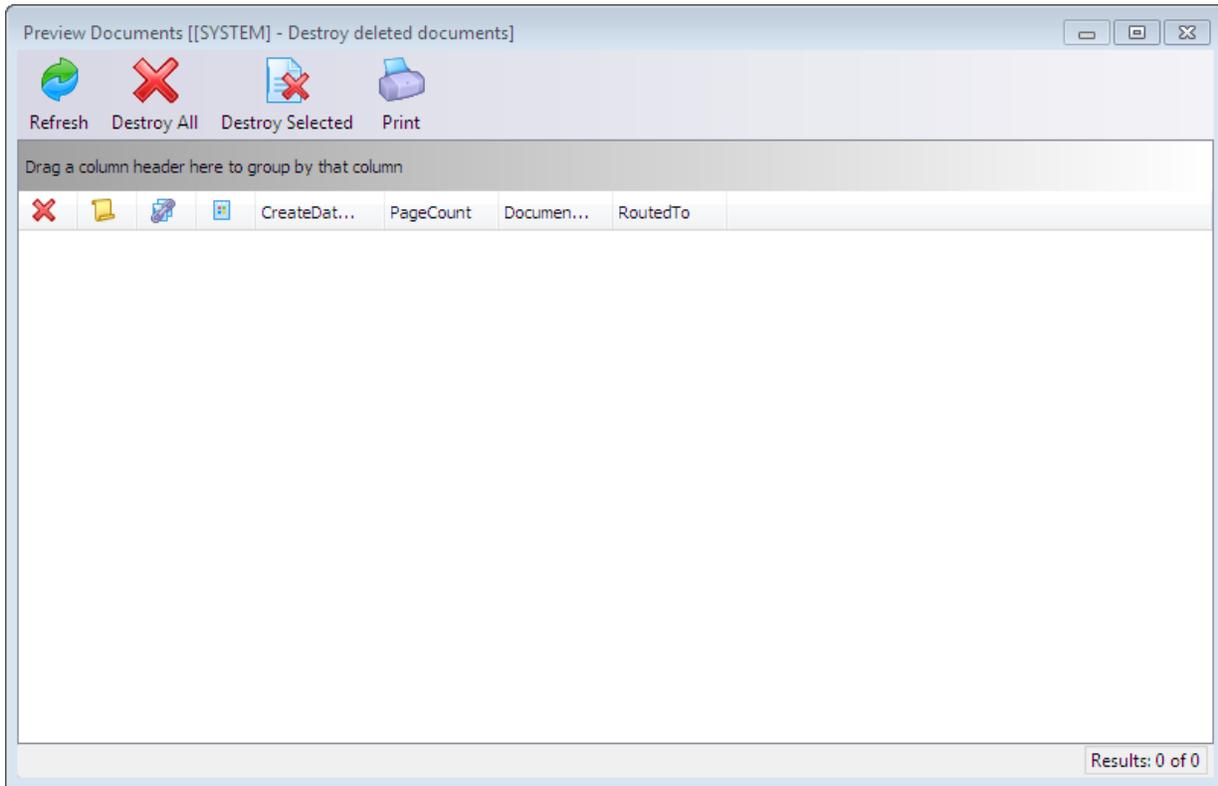
Click “No” to cancel the operation and return to the Preview Documents window and none of the documents will be destroyed.

For this example, the administrator selects “Yes” to perform the document destruction.

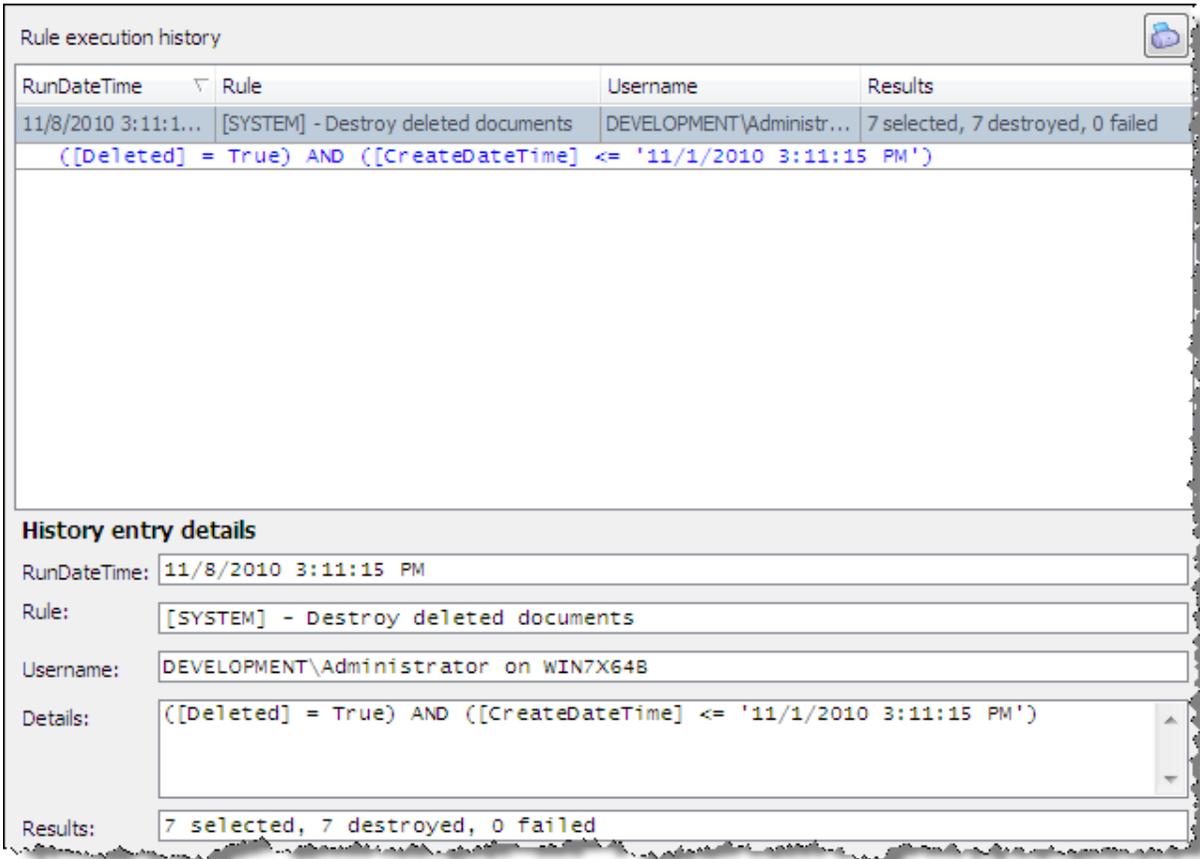


When the operation is complete, the Preview Window will display the results.

The “Destroy All” selection destroyed all 7 documents in the grid, so the Preview Window has 0 documents to display. If the administrator had selected 4 of the 7 documents and chose “Destroy Selected”, the Preview Window would display the remaining 3 documents once the operation was complete.



The “Rule execution history” section contains the history of each Destroy Deleted Documents operation performed and includes the RunDateTime, Rule, Username and Results columns. The IQQL query used for the operation is also displayed. The administrator can select an entry in the grid to view the details for the History entry.



Rule execution history

RunDateTime	Rule	Username	Results
11/8/2010 3:11:15 PM	[SYSTEM] - Destroy deleted documents	DEVELOPMENT\Administr...	7 selected, 7 destroyed, 0 failed

`(([Deleted] = True) AND ([CreateDateTime] <= '11/1/2010 3:11:15 PM'))`

History entry details

RunDateTime: 11/8/2010 3:11:15 PM

Rule: [SYSTEM] - Destroy deleted documents

Username: DEVELOPMENT\Administrator on WIN7X64B

Details: `(([Deleted] = True) AND ([CreateDateTime] <= '11/1/2010 3:11:15 PM'))`

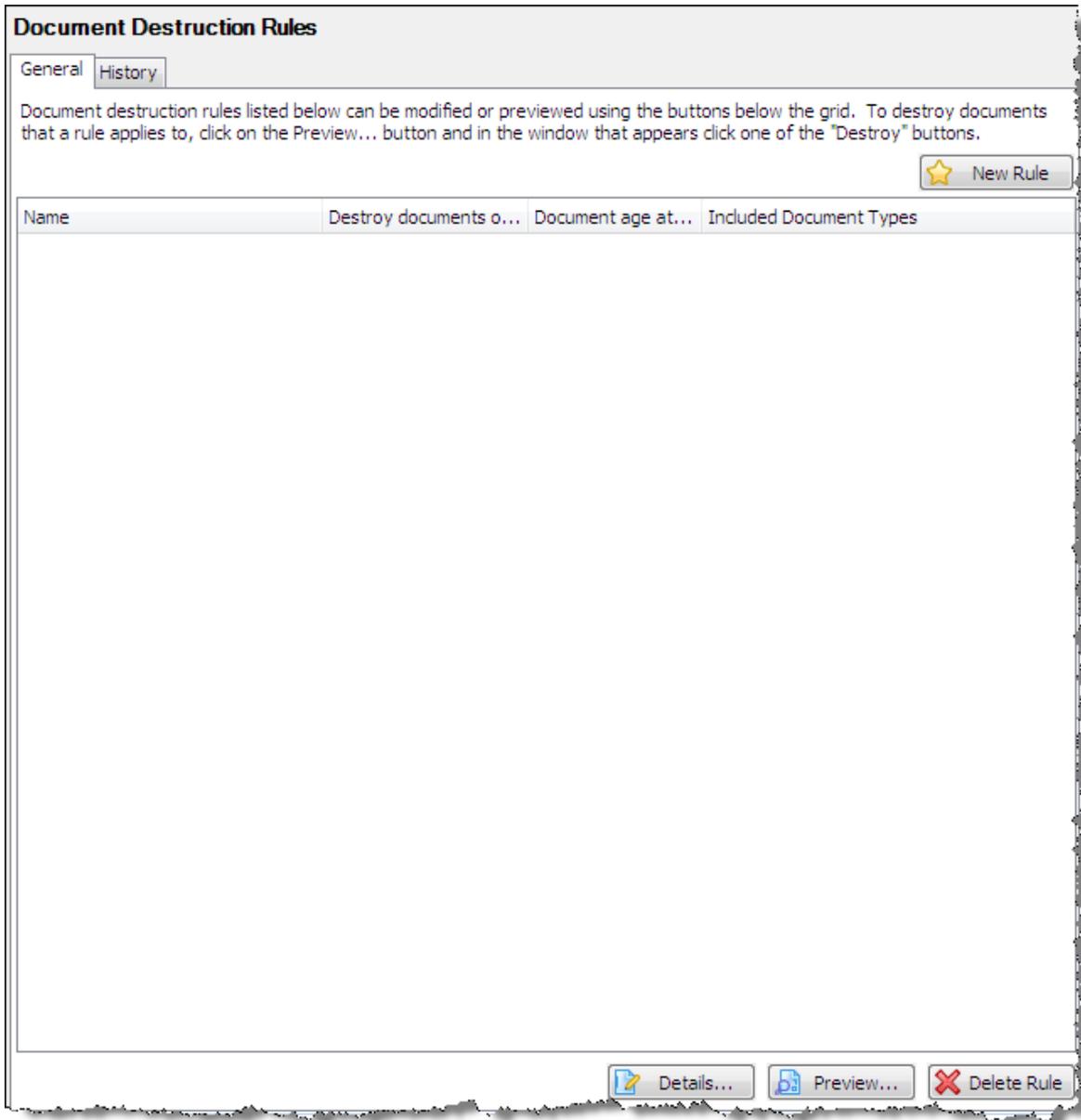
Results: 7 selected, 7 destroyed, 0 failed

If “Destroy all deleted document in the system” is selected, the Preview Documents window will display every document that is flagged as Deleted in ImageQuest. The administrator will have the same options as shown in the previous examples and the Destroy Deleted Documents operation will be logged in the history.

Note: The administrator can preview documents to be destroyed in IQadministrator from any machine, but the actual Destroy operation can only be performed from IQadministrator on the ImageQuest server.

Document Destruction Rules

Document Destruction Rules allow the administrator to create rules to destroy any or all ImageQuest documents, deleted or not, by Document Type, age and/or custom query. This feature can be useful for organizations that, due to document retention requirements, must destroy certain documents when the retention period has terminated.



Click “New Rule” to open the Add Document Destruction Rule dialog.

Type a meaningful name in the “Name” field and select which Document Type(s) apply to the rule.

In the “Destroy documents that are older than” section, change the numeric value and select “Days” or “Years” from the drop-down and then select an ImageQuest Date & Time attribute from the drop-down list in the “Determine document age using attribute” section.

Add Document Destruction Rule

Rule Details

Name:

Document Types: Select All Clear

- Employee
- Employee Record
- Invoice
- MFP Scan
- Purchase Order

Destroy documents that are older than: Years

Determine document age using attribute: CreateDateTime

Advanced >> OK Cancel

For example, the administrator wants to create a new rule to destroy all ImageQuest Employee Records where InactiveDate is older than 1 year and Active = "False".

The administrator enters "Destroy Inactive Employee Files" for the Name and selects Document Type "Employee Record". The "Destroy documents that are older than:" value is changed to "1", "Years" is selected from the drop-down and "InactiveDate" is selected from the "Determine document age using attribute" section.

The administrator then clicks "Advanced" to add additional criteria to the rule.

The Advanced section allows the administrator to add an IQQL (ImageQuest Query Language) query for the additional criteria.

In the example below, the administrator enters "Active=False" so the rule will only apply to Employee Files where the value for attribute Active is False.

After the configuration of the rule is complete, click "OK" to save the new rule.

Add Document Destruction Rule

Rule Details

Name: Destroy Inactive Employee Files

Document Types: Employee Employee Record Invoice MFP Scan Purchase Order

Destroy documents that are older than: 1 Years

Determine document age using attribute: InactiveDate

Specify additional criteria for documents to be destroyed using IQQL.
Active=False

Advanced << OK Cancel

The rule will be listed in the General tab and the administrator can click “Details” to view and/or modify the rule configuration, “Delete Rule” to delete the rule or “Preview” to preview and perform the actual document destruction.

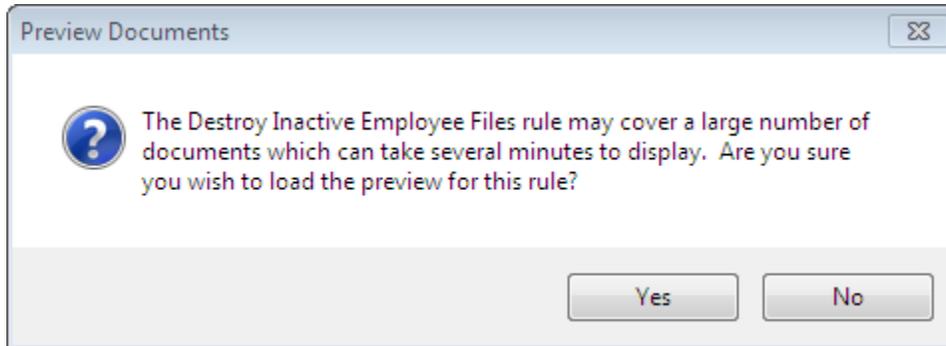
The screenshot displays the 'Document Destruction Rules' management interface. It features a 'General' tab and a 'History' tab. Below the tabs, there is a descriptive text and a 'New Rule' button. A table lists the existing rules, with one rule highlighted in blue. At the bottom, there are three buttons: 'Details...', 'Preview...', and 'Delete Rule'.

Name	Destroy documents o...	Document age at...	Included Document Types
Destroy Inactive Employee Files	1 Years	InactiveDate	Employee Record

In this example, the administrator will run the “Destroy Inactive Employee Files” rule.

The administrator selects the rule in the list and the selects “Preview”. A message box will appear asking the administrator to confirm they wish to load the preview. Clicking “Yes” will load the Preview Window. Clicking “No” returns the administrator to the Document Destruction screen.

For this example, the administrator clicks “Yes”.



The “Preview Documents” window loads and includes the rule name in the title bar. The example below displays 7 documents. At this point, the administrator has a few different options:

“Destroy All” will permanently destroy all the documents displayed in the grid.

“Destroy Selected” will permanently destroy only the documents highlighted (selected) in the grid.

The “Refresh” button refreshes the current display. The “Print” button allows the administrator to print the grid if needed. Clicking “x” will close the Preview Documents window. None of these actions will destroy any documents.

For this example, the administrator will select “Destroy All”.

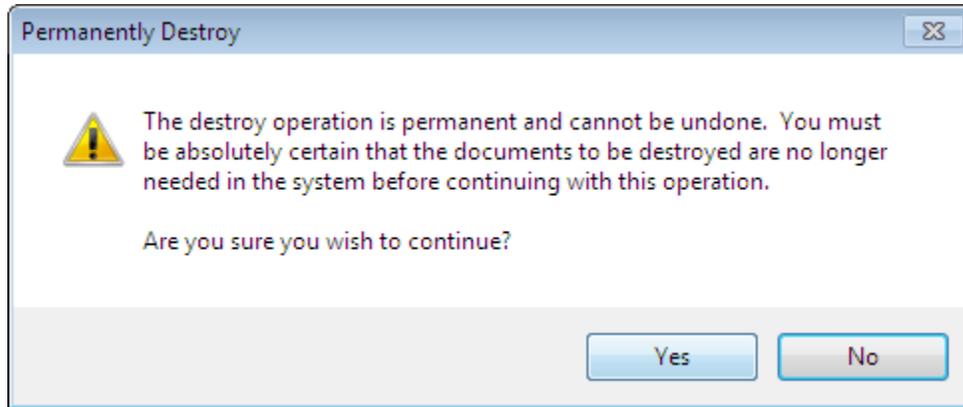
Created...	DocumentType	RoutedTo	FirstName	LastName	Inactive...	Active	PageCour
11/8/2010 ...	Employee Record		Steve	Carter	9/6/2009	<input type="checkbox"/>	
11/8/2010 ...	Employee Record		Henry	Myers	9/1/2009	<input type="checkbox"/>	
11/8/2010 ...	Employee Record		David	Davis	9/7/2009	<input type="checkbox"/>	
11/8/2010 ...	Employee Record		Timothy	Tyler	9/7/2009	<input type="checkbox"/>	
11/8/2010 ...	Employee Record		Bob	Stephens	9/15/2009	<input type="checkbox"/>	
11/8/2010 ...	Employee Record		Fred	Lyon	9/2/2009	<input type="checkbox"/>	
11/8/2010 ...	Employee Record		Glen	Lehman	9/27/2009	<input type="checkbox"/>	

Results: 7 of 7

When the administrator selects “Destroy All” or “Destroy Selected”, the message below is displayed. Click “Yes” to continue and perform the operation.

Click “No” to cancel the operation and return to the Preview Documents window and none of the documents will be destroyed.

For this example, the administrator selects “Yes”.



When the operation is complete, the Preview Window will display the results.

The “Destroy All” selection destroyed all 7 documents in the grid, so the Preview Window has 0 documents to display. If the administrator had selected 4 of the 7 documents and chose “Destroy Selected”, the Preview Window would display the remaining 3 documents once the operation was complete.

The History tab contains a history entry for each Destroy Deleted Documents operation performed and includes the RunDateTime, Rule, Username and Results columns. The IQQL query used for the operation is also displayed. The administrator can select an entry in the grid to view the details for the History entry.

Document Destruction Rules

General History

Rule execution history 

RunDateTime	Rule	Username	Results
11/8/2010 4:13:0...	Destroy Inactive Employee Files	DEVELOPMENT\Administr...	7 selected, 7 destroyed, 0 failed
DocumentType IN ('Employee Record') AND (Active=False) AND ([InactiveDate] <=			
11/8/2010 3:11:1...	[SYSTEM] - Destroy deleted documents	DEVELOPMENT\Administr...	7 selected, 7 destroyed, 0 failed
([Deleted] = True) AND ([CreateDateTime] <= '11/1/2010 3:11:15 PM')			

History entry details

RunDateTime: 11/8/2010 4:13:05 PM

Rule: Destroy Inactive Employee Files

Username: DEVELOPMENT\Administrator on WIN7X64B

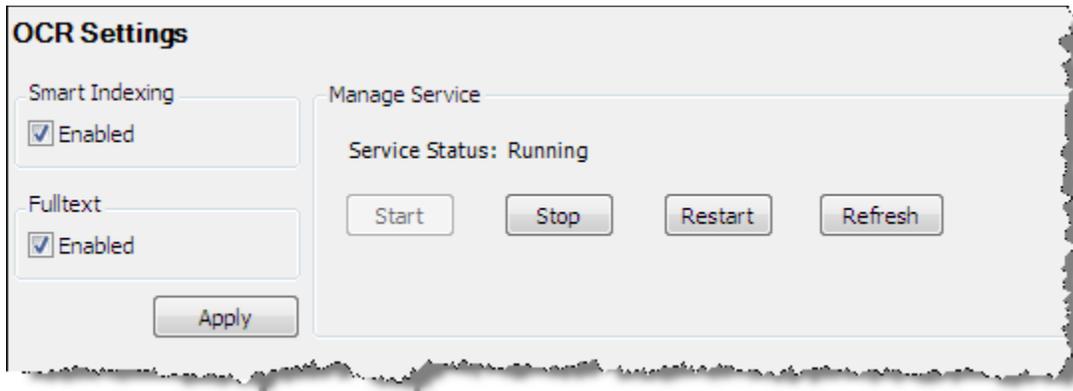
Details: DocumentType IN ('Employee Record') AND (Active=False) AND ([InactiveDate] <= '11/8/2009 4:13:05 PM')

Results: 7 selected, 7 destroyed, 0 failed

Note: The administrator can preview documents to be destroyed in IQadministrator from any machine, but the actual Destroy operation can only be performed from IQadministrator on the ImageQuest server.

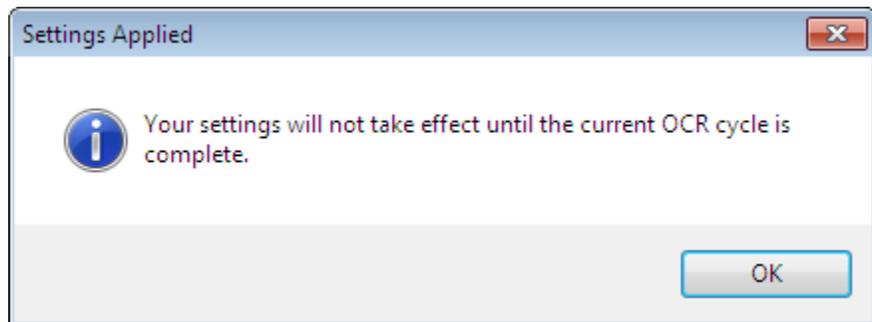
OCR Settings

OCR Settings allows the administrator to enable or disable OCR features and manage the IQ OCR and Full Text Service.



To enable or disable Smart Indexing, Fulltext of both, check or uncheck the appropriate box and click “Apply”.

The message below will appear notifying the administrator that the changes will not take effect until the current OCR cycle is complete.



The Manage Service feature allows the ImageQuest Administrator to confirm the status of the IQ OCR and Full Text Service and Stop, Start and Restart the service as needed. Client machines can also manage the service remotely provided their Windows user account has permissions to start and stop services on the ImageQuest server.

Configure RightFax Connector

Configure RightFax Connector has a new “Perform OCR” option that, when enabled, allows the IQ OCR and Full Text Service to perform full-text extraction on all archived Inbound and/or Outbound faxes and converts them into searchable PDF documents.

Configure RightFax Connector

System Configuration Settings | Archive User List | Service

RightFax Configuration

Server Name: RFServer
 Admin User Name: Admin
 Admin Password: *****
 Confirm Password: *****
 Test

Document Types

Inbound Fax: Inbound Fax
 Outbound Fax: Outbound Fax

Archive Inbound Fax Delete After Archive
 Archive Outbound Fax Perform OCR
 Check Archive Flag Index Inbound Fax

Select additional fields to archive.

- AutoForwardCount
- BFTFilename
- BFTFileSize
- ChannelToSendOn
- CoverSheetNotes
- CoverSheetSizeInBytes
- DelayFaxSendDateTime

Deleted Items User:

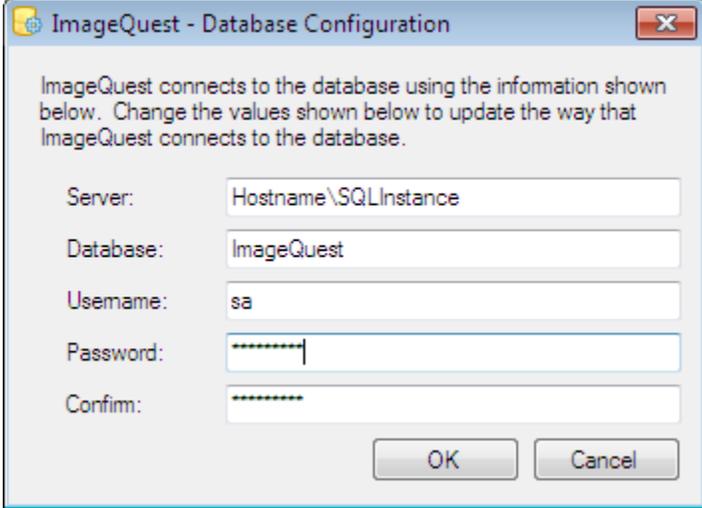
Connect Type: TCP/IP
 Archive Days: 6
 Archive Interval Minutes: 60

Save Cancel

To enable this feature, check “Perform OCR” and click “Save”. It is recommended you restart the RightFax Connector Service after making this change. The service can be restarted under the Service tab.

Database Configuration Utility

There is a new configuration tool included on the ImageQuest server that allows the administrator to update the SQL server credentials. This can be used if the ImageQuest database is moved to another SQL server or if the SQL login credentials have changed. The password is no longer stored in the webseivces\web.config file and it is now encrypted.



The screenshot shows a Windows-style dialog box titled "ImageQuest - Database Configuration". The dialog contains the following text and fields:

ImageQuest connects to the database using the information shown below. Change the values shown below to update the way that ImageQuest connects to the database.

Server:

Database:

Username:

Password:

Confirm:

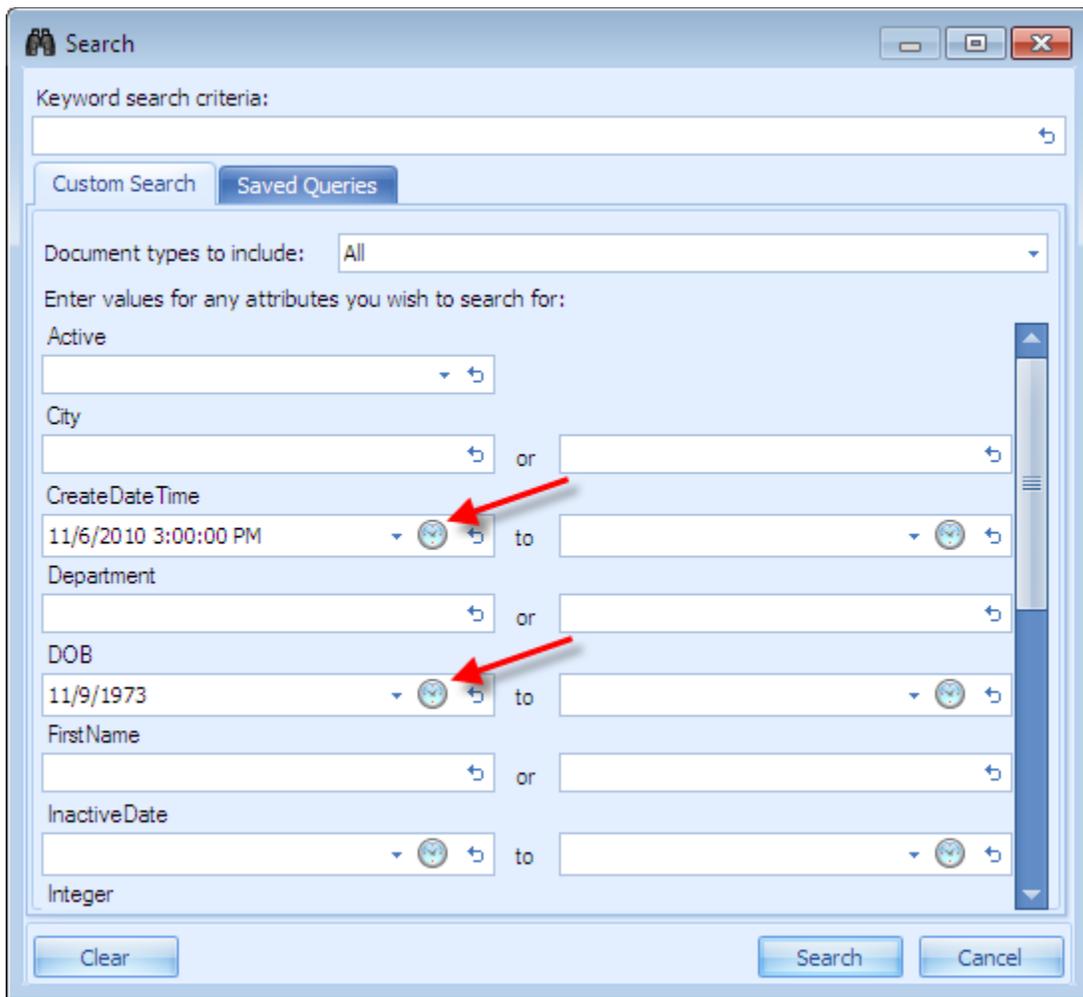
At the bottom right of the dialog are two buttons: "OK" and "Cancel".

Note: The ImageQuest Application Service must be restarted after making a change to the database credentials.

IQ Client Applications

Enhanced Date & Time Searching

There is a new icon that appears on all Date & Time attributes that toggles the time portion of the attribute. Click it once to show the time and click it again to hide the time. This feature is available from the search tab in IQdesktop and from the “Open from ImageQuest” search window from Microsoft Word and Microsoft Excel.



The screenshot shows a "Search" window with the following elements:

- Keyword search criteria:** A text input field.
- Custom Search / Saved Queries:** Two tabs, with "Saved Queries" selected.
- Document types to include:** A dropdown menu set to "All".
- Enter values for any attributes you wish to search for:** A list of attributes with search fields:
 - Active:** A dropdown menu.
 - City:** A text input field.
 - CreateDateTime:** A date and time field showing "11/6/2010 3:00:00 PM" with a toggle icon (clock with a plus sign) to its right. A red arrow points to this icon.
 - Department:** A text input field.
 - DOB:** A date field showing "11/9/1973" with a toggle icon (clock with a plus sign) to its right. A red arrow points to this icon.
 - FirstName:** A text input field.
 - InactiveDate:** A date field with a toggle icon (clock with a plus sign) to its right.
 - Integer:** A text input field.
- Buttons:** "Clear", "Search", and "Cancel" buttons at the bottom.

IQscan

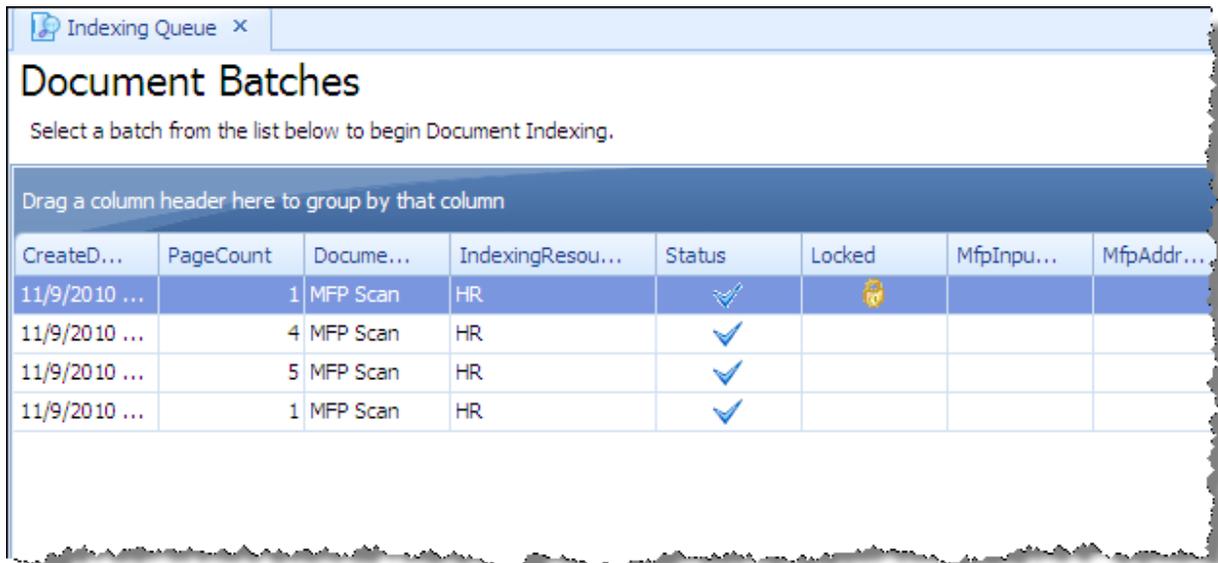
Support has been added for HP Smart Document Scan Software (SDSS) version 2.7 and the HP Scanjet 9000 scanner.

Automatic Document Type Selection

When a user only has access to one document type, the document type will automatically be assigned for the user when during indexing.

Indexing Queue Locked Column

The indexing queue now includes a “Locked” column that will display an icon if another user has the record open for indexing. If another user tries to index the locked document, a message will appear which will contain the user name and machine name of the user actively indexing the record as well as the lock expiration time. The lock cannot be overridden until it expires, which is 30 minutes from the time the document was originally opened.



Indexing Queue x

Document Batches

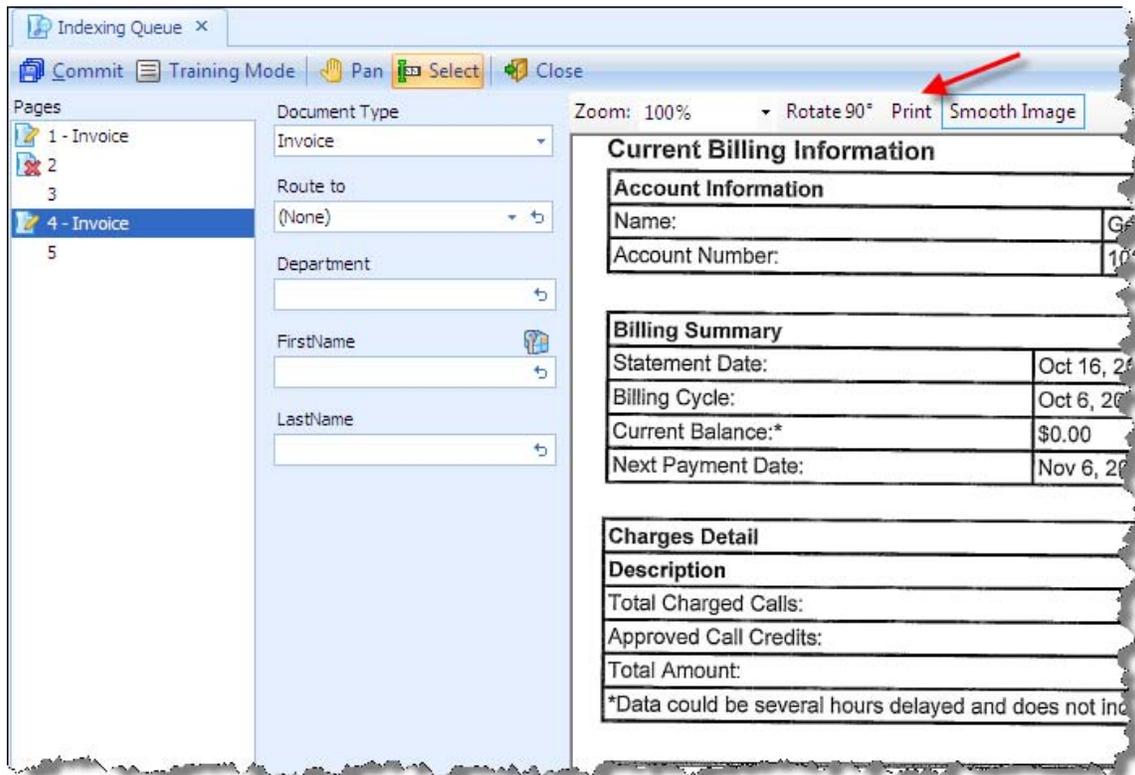
Select a batch from the list below to begin Document Indexing.

Drag a column header here to group by that column

Created...	PageCount	Docume...	IndexingResou...	Status	Locked	MfpInpu...	MfpAddr...
11/9/2010 ...	1	MFP Scan	HR	✓	🔒		
11/9/2010 ...	4	MFP Scan	HR	✓			
11/9/2010 ...	5	MFP Scan	HR	✓			
11/9/2010 ...	1	MFP Scan	HR	✓			

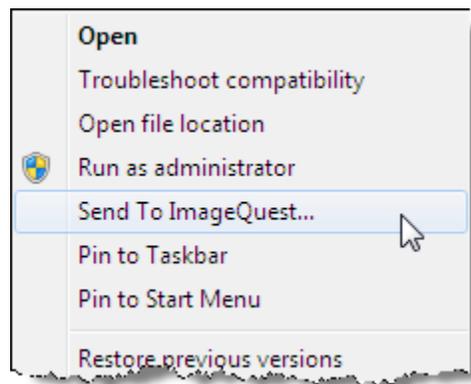
Indexing Queue Print Button

There is a new option available in the Indexing Queue which enables users to print the open document. The print button will include all of the pages in the current document, even excluded pages regardless of document type and page order.



Windows Explorer Connector

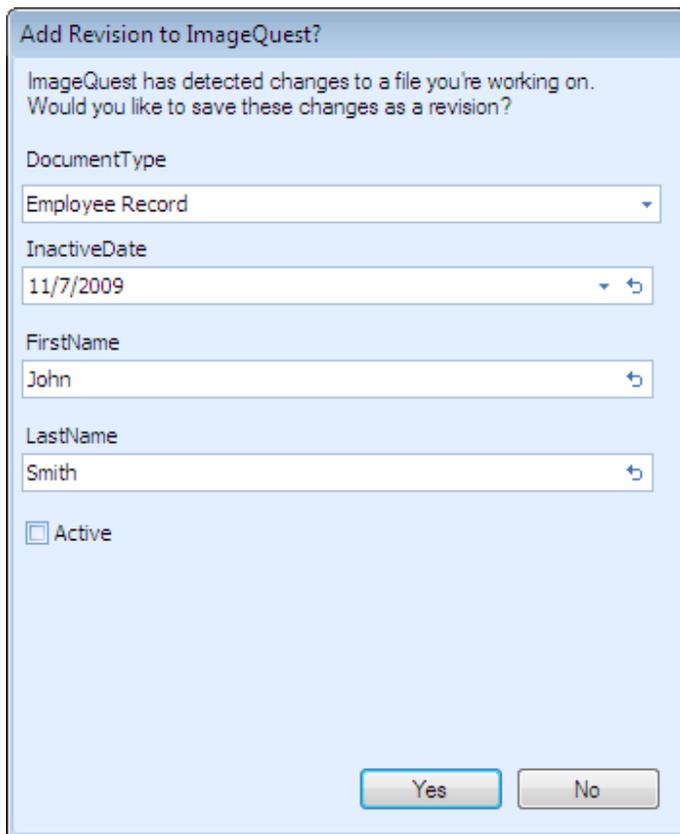
The right-click > "Send to" > IQdesktop option in Windows Explorer has been moved up a level to the root of the right-click menu. It is now simply called "Send to ImageQuest...".



ImageQuest Assistant

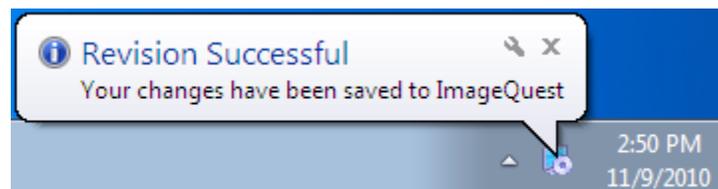
The ImageQuest Assistant is a new program that runs in the Windows system tray and monitors changes made to PDF files that are opened from IQdesktop and saves revisions back to ImageQuest. To use this feature, a PDF authoring program must be installed and configured as the default PDF file handler in Windows such as Adobe® Acrobat® or Foxit® PDF Editor.

After editing a PDF file that was opened via IQdesktop, click “save” or simply close the program and answer yes when prompted to save the file. The ImageQuest Assistant will pop up asking if you want to add a revision to ImageQuest.



The dialog box is titled "Add Revision to ImageQuest?". It contains the following text: "ImageQuest has detected changes to a file you're working on. Would you like to save these changes as a revision?". Below this text are several input fields: "DocumentType" with a dropdown menu showing "Employee Record"; "InactiveDate" with a date field showing "11/7/2009"; "FirstName" with a text field showing "John"; and "LastName" with a text field showing "Smith". There is also a checkbox labeled "Active" which is currently unchecked. At the bottom of the dialog are two buttons: "Yes" and "No".

After clicking “Yes” to save the revision, a message notification will appear in the system tray letting you know that the changes were successfully saved to ImageQuest.

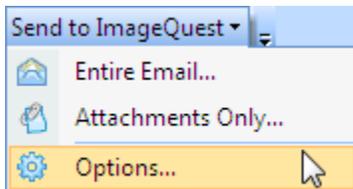


Outlook Office Connector Enhancement

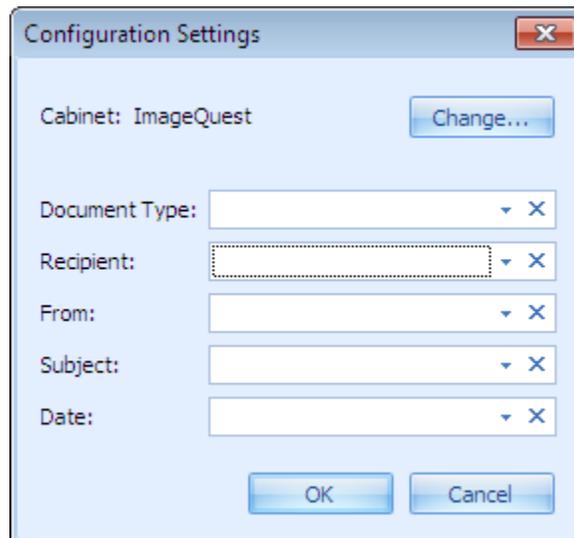
The Outlook Office Connector now has the option of automatically filling in the following attributes during indexing:

- DocumentType
- Recipient
- From
- Subject
- Date

To configure this, open up Microsoft Outlook and select “Options...” from the “Send to ImageQuest” button on the toolbar.



The Configuration Settings window will open. From here the user can choose which cabinet the connector will use (if more than cabinet exists) and they can map the email fields to an existing document type and to existing ImageQuest attributes.



Note: The ImageQuest attributes must be created first before configuring the Outlook Office Connector.

ImageQuest Office Connector

Office 2010 (x86 only) is now supported.

Routing Notification Enhancement

The routing notification email message that is sent when a document is routed via IQdesktop now displays the attribute values, cabinet name and a link to the image. In order for the link to work, WebIQ must be configured on the ImageQuest server.

