

ImageQuest

Supplement Guide

Version 11.0



informa
software

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Requirements

Server Requirements

- P4 CPU or higher (multi-core recommended)
- 2GB Memory (4GB Recommended)
- DVD Drive (if installing from disc)
- 300MB 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 runs in 32-bit mode on a 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 4.0 (Full Framework)
- Microsoft SQL Server 2005 or 2008 is required to install ImageQuest. If you do not already have a SQL server, SQL server 2008 R2 Express is included on the installation media.
- Internet Information Service (IIS) Server is required to configure WebIQ
- IIS must be installed and configured to install OXPd on an HP device which does not natively support OXPd.

Client Requirements

- P4 CPU or higher (multi-core CPU recommended)
- 80MB free hard drive space (for program files only)
- Microsoft .Net Framework version 4.0 (Client Profile)
- 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 a 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 7 or higher

OXPd Requirements (Required for HP MFP Integration)

- ImageQuest version 11.0 must be installed
- Supported HP device with the latest firmware
- IIS must be installed on the ImageQuest Server

HP OXPd supported devices

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
- M4500 series: Natively Supported

Installation

Installation Notes

- ImageQuest 11.0 only supports upgrading from at least version 10.3. If you are running an older version, you must first upgrade to 10.3 before moving to 11.0.
- It is recommended that you backup your existing ImageQuest images folder and SQL database prior to performing an upgrade.
- The IQ Application Service must be "Started" before performing an upgrade.
- ImageQuest client machines must be upgraded to 11.0 after a server upgrade.
- SQL server is no longer installed by the ImageQuest installer. There is an option in the Autorun program on the installation media 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 ImageQuest 10.3 to ImageQuest 11.0 using an existing SQL server in the organization
- Install ImageQuest 11.0 and SQL 2008 R2 Express x86 edition
- Install ImageQuest 11.0 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
- 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.

Alternatively, you may run the server.msi program in the root of the installation media which will work for both new installs and for 10.3 upgrades.

Upgrading to 11.0

Version 11.0 can only upgrade from ImageQuest version 10.3. If you are running 10.2 or older, you will first need to upgrade to ImageQuest 10.3 before applying the 11.0 update. Please contact Informa Software support for assistance with obtaining an older version of the software.

To upgrade to version 11.0, click the “Install ImageQuest...” > “Install/Upgrade” buttons from the autorun program or run the server.msi 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.

Client Installation

To install or upgrade the ImageQuest client run the client.msi program from the installation media. The client.msi file is also shared out on the ImageQuest server in a file share called ClientSetup.

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
```

Administration

New Action Permissions

Three new action permissions have been introduced in version 11.0:

- Annotate Document Image
- View Only
- View Prior Revisions

The “Annotate Document Image” permission allows a user to add annotations to a PDF document from IQdesktop. The newly annotated document becomes the current record when saved and the original document is still available as a revision from the history pane. If this permission is Denied or Not Set, the Annotate option will be grayed out in IQdesktop.

The “View Only” permission disables documents from launching in their native program and loads the documents in a Read-Only viewer. In order to use this feature, a valid Windows preview handler must be installed for the file types being viewed. Adobe Reader and Microsoft Office 2007 and 2010 both install their own Windows preview handlers and allow viewing of their respective file types. IQdesktop also has a built in preview handler for viewing .tif files. Allowing this permission also disables the following menu items: Save Local Copy, Email Document and Export to Folder. This is the only permission that removes access rights when it is set to Allow rather than Deny.

Note: WebIQ does not respect this permission and will still launch the files’ associated application.

Allowing the “View Prior Revisions” permission gives users the ability to view older versions of a document by right-clicking the revision in the history pane and selecting “View Revision”. If this permission is set to Deny or Not Set, the “View Revision” option will be grayed out.

Category\Subcategory List Attribute Type

A new option has been introduced to the List attribute called Category\Subcategory. If this option is enabled, list items will be shown in a hierarchical view where the subcategory changes based on the chosen category. For this to function properly, category and subcategory items must be separated by the backslash (\) character.

Modify Attribute

Attribute Name:

Data Type

Text
 Numeric
 List
 Integer
 Date & Time
 True/False

Description

List-based attributes allow you to select an item from a list of choices you define. Items optionally be defined as a category and subcategory, separated by a backslash (\).
 Examples:
 A list of customers, from which you can choose Mary, Joe or Bob.
 A list of cities, from which you can choose London, Tokyo or Paris.
 A list of college courses such as the following:
 Math\Algebra
 Math\Calculus
 Science\Biology
 from which you could then choose Math, then Algebra, or choose Science, then Biology.

Options

Name	Enabled
Click here to add a new row	
Florida\Winter Springs	<input checked="" type="checkbox"/>
New York\Albany	<input checked="" type="checkbox"/>
New York\Buffalo	<input checked="" type="checkbox"/>
New York\Commack	<input checked="" type="checkbox"/>

Required
 Include in filename
 Items are of the form Category\Subcategory

Location

Category:
New York

Subcategory:
Albany
Buffalo
Commack
New York

Location
New York\Albany

Public Document Groups

Document groups can now be configured as public groups which gives everyone access to the documents in that group (assuming the user has document type permissions). There is also a new option to require a document group be selected when indexing a document. In order to use this feature, a default public group must be specified first.



Document Groups and Permissions

Manage your existing Document Groups in the list below. Click the Edit button or double-click an item to modify permissions.

New... Edit... Delete

Document Group is Required

Default Public Group: Public Group

Name	Roles	Users
 Confidential Document	Admin Role	
 Public Group	(All Roles)	(All Users)

New OCR Enhancements

The OCR service now benefits from multi-core, hyper-threaded and multi-CPU systems resulting in much faster processing times.

There are also two new tabs under the OCR settings menu: OCR Queue and Fulltext/OCR Errors. The OCR Queue shows the list of documents across all ImageQuest cabinets that are waiting to be both Smart Indexed and Full-Text extracted with the document currently being processed highlighted in yellow.

Double clicking on a row will launch the application associated with the file type allowing you to view the image.

OCR Settings

Management **OCR Queue** Fulltext/OCR Errors

Drag a column header here to group by that column

Ordinal	OCR Type	Cabinet	DocumentType	FileType	PageCount	Size (MB)	CreateDateTime	Document Id
0	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	ef8aaab6-a65b-4f19-8e45-
1	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	28f9d2b8-0475-4e73-90bb-
2	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	37dc2f2c-7186-4cba-a6de-
3	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	bb73d384-5acc-4a02-894c-
4	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	99c1530a-7c25-43ca-995e-
5	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	f8835017-d678-4d30-acd8-
6	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	9ba13cdb-873b-4656-a960-
7	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	fecfac69-f8c2-4780-a182-8-
8	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	21f9d6fb-8b31-4650-b5cc-
9	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	f3e01ac3-2a0b-44b2-aeb2-
10	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	de5ee6de-acfd-493d-bdc8-
11	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	23d2f5c7-b2a3-460d-969d-
12	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	7f61682c-4189-4094-b05d-
13	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	02f8e083-9a07-46c9-8df1-
14	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	c950d018-7e4e-425c-a00d-
15	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	2188f854-3348-40aa-8a4c-
16	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	36d8cff4-e37f-4fc0-8627-3-
17	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	6c41502c-d999-46d7-84d0-
18	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	9ae55953-6b7b-481e-b3bd-
19	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	25b5c285-483a-4138-beec-
20	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	47620e9d-2af4-4c0b-8bb1-
21	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	a41bdd46-05f4-41af-80f1-
22	SmartIndexing	Cabinet2	MFP Scan	TIF	1	0.02	8/31/2010 9:15 AM	cfb747bf-a236-4f51-ba2e-

Refresh

The “Fulltext/OCR Errors” tab shows a list of documents that have failed the OCR process for one reason or another. Records in this view can also be double-clicked on to view the failed document. There is an option at the bottom of the window to reprocess the selected documents which may or may not re-OCR successfully depending on what the original error message was.

OCR Settings

Management | OCR Queue | **Fulltext/OCR Errors**

Drag a column header here to group by that column

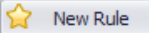
FileType	CreateDateTime	Failed	Message
TIF	5/26/2010 4:07:03 PM	10/25/2011 7:16 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:04 PM	10/25/2011 7:05 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:04 PM	10/25/2011 6:54 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:04 PM	10/25/2011 6:50 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:05 PM	10/25/2011 6:47 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:05 PM	10/25/2011 6:43 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:09 PM	10/25/2011 6:00 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:15 PM	10/25/2011 5:50 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:16 PM	10/25/2011 5:47 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:17 PM	10/25/2011 5:44 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:17 PM	10/25/2011 5:41 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:18 PM	10/25/2011 5:37 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:18 PM	10/25/2011 5:34 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:19 PM	10/25/2011 5:30 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:19 PM	10/25/2011 5:27 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:19 PM	10/25/2011 5:24 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:20 PM	10/25/2011 5:17 AM	OCR export Failed: There was end error while parsing the PDF file. The PDF is likely corrup
TIF	5/26/2010 4:07:26 PM	10/25/2011 3:58 AM	OCR export Failed: OCR Engine return error code API_PROCESS_ABORTED_ERR: System.
TIF	5/26/2010 4:07:28 PM	10/25/2011 3:05 AM	OCR export Failed: OCR Engine return error code API_PROCESS_ABORTED_ERR: System.
TIF	5/26/2010 4:07:30 PM	10/25/2011 1:55 AM	OCR export Failed: OCR Engine return error code API_PROCESS_ABORTED_ERR: System.
TIF	5/26/2010 4:08:23 PM	10/24/2011 11:17 PM	OCR export Failed: OCR Engine return error code API_PROCESS_ABORTED_ERR: System.
PDF	5/26/2010 5:23:44 PM	10/24/2011 5:18 PM	OCR export Failed: Failed to open PDF for processing, possibly password protected.

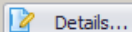

Reprocess and clear Clear Selected Clear All Refresh

Notification Rules

Notification rules allow the ImageQuest administrator to setup an e-mail alert mechanism when a specified date attribute falls between today and a fixed number of days in the future, with optional recurrences. Documents that meet this criteria will be placed in the IQ user or role's Work Queue in IQdesktop and an e-mail will be sent to the user(s) with a link to the document in WebIQ.

Notification Rules				
Name	Date Attribute	Days Notice	Days Recurring	Message
Contract Expiration	Expiration Date	120	15	This contract will expire in 120 days or less.
Invoice Payment Due	Invoice Due Date	10	2	Invoice payment is due in 10 days or less.
Software Maintenance Renewal	Expiration Date	30	10	Software maintenance is about to expire in 30 ...

 New Rule

 Details...  Delete Rule

To create a new rule, click the New Rule button. The following screen shows a sample rule which does the following:

- Monitors the attribute called Expiration Date for documents that will expire within 120 days from today's date
- Sends an e-mail to all members of the Purchasing IQ role with a link to the document in WebIQ
- A recurring email will be sent to all members of the Purchasing IQ role every 15 days after the initial e-mail is sent.
- The document will be routed to the work queue for all members of the Purchasing IQ role
- This rule will only be triggered when the Document Type is equal to Contract and the Not Renewing True/False attribute is not set to True.

Notification Rule Details

Rule Details

Name:

Apply to attribute:

Days notice:

Recur every days (0 for no recurrence)

Notify:

Message

This contract will expire in 120 days or less.

Specify additional criteria for notification using IQQL

[DocumentType] = 'Contract' and ([Not Renewing] = 0 or [Not Renewing] = NULL)

Advanced << OK Cancel

Note: Notification Rules will only be triggered when the attribute date is in the future. The notification rule engine processes documents every 60 minutes from the time the IQ application service is started.

Report View

Report View is a program that administrators can run from the ImageQuest server that creates a SQL view called vwMetadata within the ImageQuest database that can be used for reporting purposes. The program exposes the ImageQuest data in an easy to use format and must be run whenever attributes are added or removed from the system. It creates views for all of the cabinets in the warehouse and can be found in the ImageQuest client installation folder using Windows Explorer:

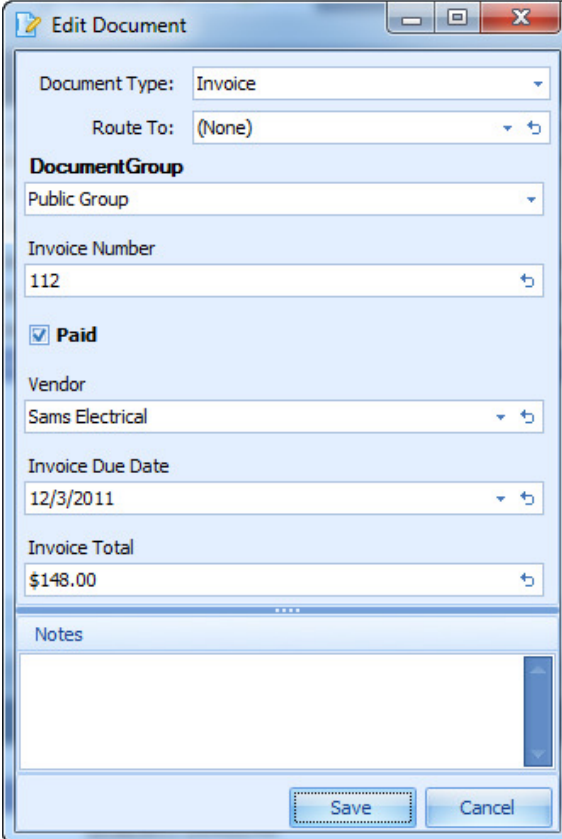
```
..\ImageQuest\ClientTools\Administrator\Informa.ImageQuest.ReportView.exe
```

Note: Report View can only be run from the ImageQuest server console and a valid reporting license must be installed.

IQ Client Applications

Enhanced Edit Document Box

The Edit Document dialog box has been enhanced to include the “Notes” field rather than popping up a “Notes” dialog box as in previous versions.



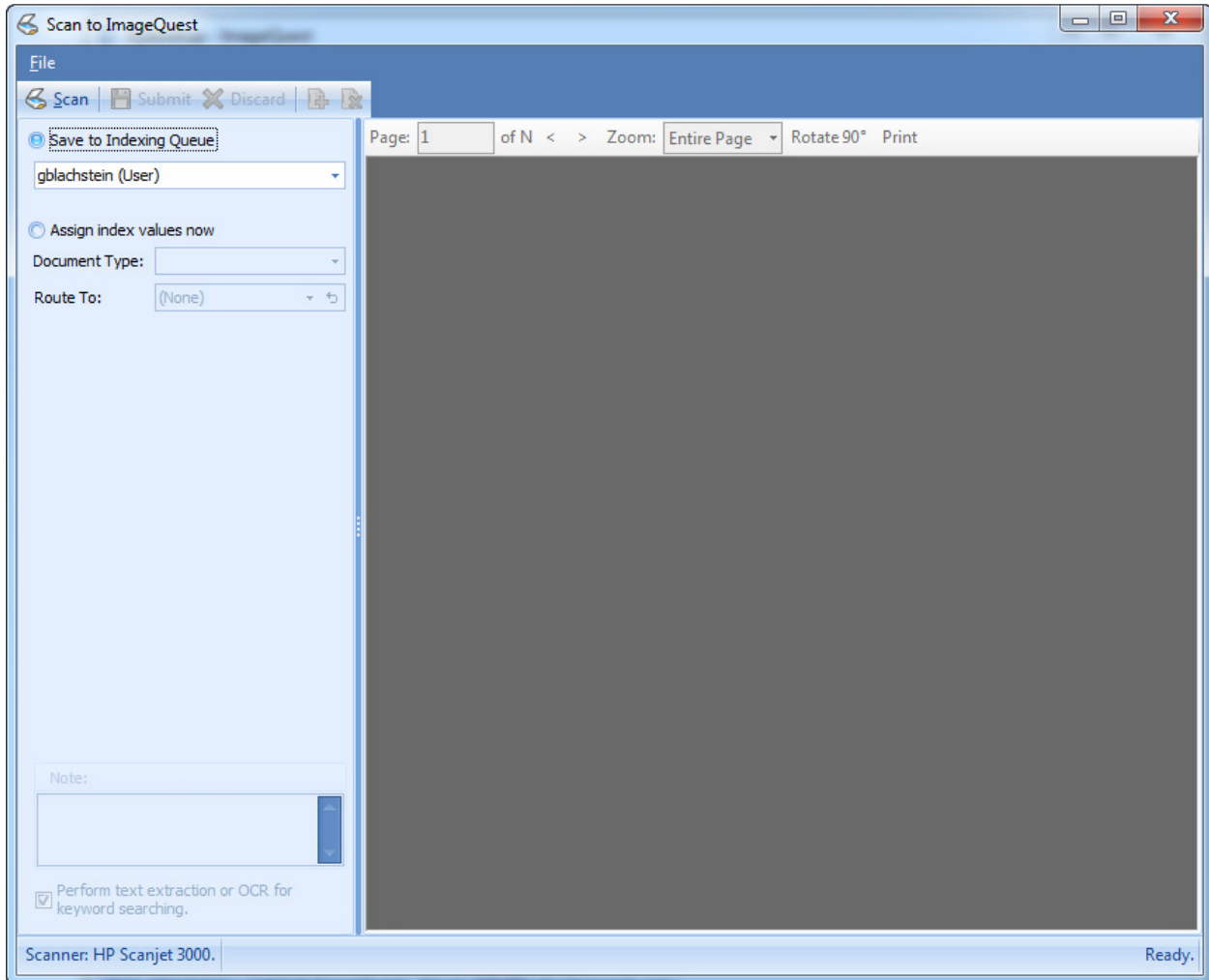
The screenshot shows the 'Edit Document' dialog box with the following fields and values:

- Document Type: Invoice
- Route To: (None)
- DocumentGroup: Public Group
- Invoice Number: 112
- Paid
- Vendor: Sams Electrical
- Invoice Due Date: 12/3/2011
- Invoice Total: \$148.00
- Notes: (Empty text area)

Buttons: Save, Cancel



Scan to ImageQuest

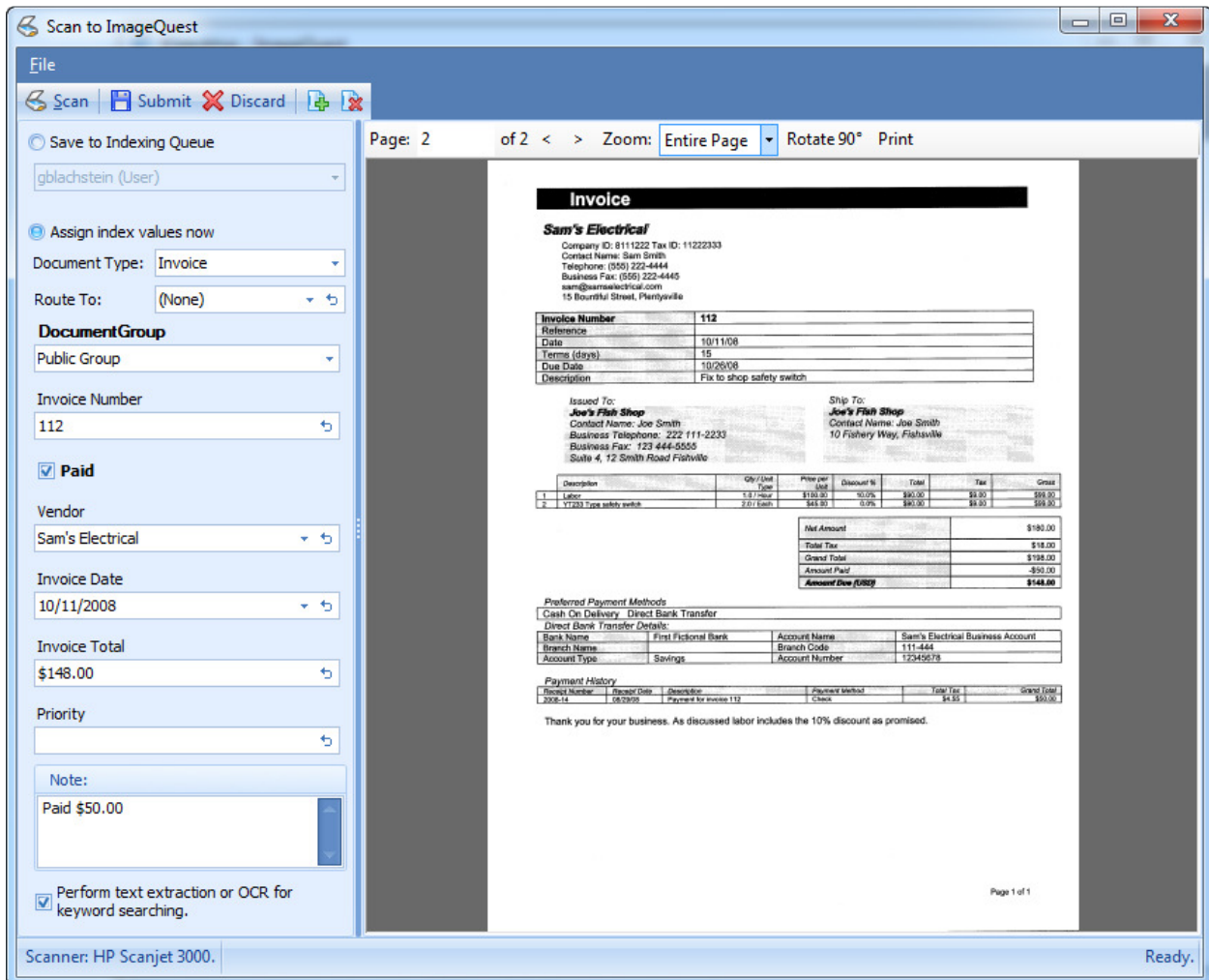
Scan to ImageQuest replaces the IQscan program that shipped with earlier versions of the ImageQuest client and should now support any scanner that uses a TWAIN driver. If a user has the “Add Document” permission, they will see a link to the scanning application in the “Tasks” pane of IQdesktop. Clicking the link will launch the scanning interface.



There are two different ways to scan documents into ImageQuest. The default option is to save the scan to the logged in user’s Indexing Queue. Use this option if you need to use batch processing or if you want to use the Smart Indexing feature. You can also use this option to scan the documents into another user or role’s Indexing Queue by changing the selection in the drop down menu.

The second option is to assign the index values up front and commit the scan directly to ImageQuest. Use this method if you do not need to use Smart Indexing or if you need the ability for the document to bypass the OCR process and remain a .Tif file (optional). Unlike the IQfolder, this method will not create an “MFP Scan” document type.

To start a new scan using the default TWAIN driver options, simply click the Scan button in the toolbar. If you need to change the source scanner or to select different scanning options, click on the File menu and select either Select Source or Scan with Advanced Options. After the scan is completed, you have several options available on the toolbar. Clicking the scan button again will append pages to the end of the current document. Clicking the  icon will add a page before the current page and clicking the  icon will delete the current page. Click "Submit" to complete the scanning process or "Discard" to cancel and exit the scanning application.



The screenshot shows the ImageQuest software interface with a scanned invoice document. The interface includes a menu bar (File), a toolbar (Scan, Submit, Discard, plus, minus), and a sidebar with various options like 'Save to Indexing Queue', 'Assign index values now', 'Document Type', 'Route To', 'Document Group', 'Invoice Number', 'Vendor', 'Invoice Date', 'Invoice Total', 'Priority', and 'Note'. The main window displays the scanned invoice from Sam's Electrical, including company information, invoice details, a table of items, and payment information.

Invoice

Sam's Electrical
 Company ID: 811222 Tax ID: 11222333
 Contact Name: Sam Smith
 Telephone: (555) 222-4444
 Business Fax: (555) 222-4445
 sam@samselectrical.com
 15 Bournefiel Street, Perryville

Invoice Number	112
Reference	
Date	10/11/08
Terms (days)	15
Due Date	10/26/08
Description	Fix to shop safety switch

Issued To: **Joe's Fish Shop**
 Contact Name: Joe Smith
 Business Telephone: 222 111-2233
 Business Fax: 123 444-5555
 Suite 4, 12 Smith Road Fishville

Ship To: **Joe's Fish Shop**
 Contact Name: Joe Smith
 10 Fishery Way, Fishville

Description	Qty/Unit	Price per Unit	Discount %	Total	Tax	Cost
1 Labor	1.0 / Hour	\$10.00	0.0%	\$0.00	\$0.00	\$0.00
2 Y2203 Type safety switch	2.0 / Each	\$45.00	0.0%	\$90.00	\$9.00	\$99.00

Net Amount	\$190.00
Tax	\$18.00
Grand Total	\$208.00
Amount Paid	-\$50.00
Amount Due (USD)	\$158.00

Preferred Payment Methods
 Cash On Delivery Direct Bank Transfer

Direct Bank Transfer Details:

Bank Name	Account Name
First Fictional Bank	Sam's Electrical Business Account
Branch Name	Branch Code
	111-444
Account Type	Account Number
Savings	12345678

Payment History

Receipt Number	Receipt Date	Description	Payment Method	Total YTD	Grand Total
2008-14	08/29/08	Payment for Invoice 112	Check	\$4.00	\$162.00

Thank you for your business. As discussed labor includes the 10% discount as promised.

Page 1 of 1

Scanner: HP Scanjet 3000. Ready.

Note: The look and feel of the advanced scanning options is determined by the type of scanner you have and the driver that is installed.

Preview Pane

The IQdesktop client now has an additional image preview window that lets you see the document within the client without launching the associated application. ImageQuest uses built in Windows Preview Handlers, the same technology that Microsoft Windows Explorer and Microsoft Outlook use, in order to render the preview pane. The following file types should preview in IQdesktop without the need to install additional software: .bmp, .jpg, .rtf, .txt, .tif, and .htm. Additional preview handlers can be installed as well in order to preview other file types. Installing Microsoft Office 2007 or 2010 will activate previews for .doc, .docx, .xls, .xlsx, .ppt, and .pptx while installing Adobe Reader 9 or 10 will activate .pdf files.

The screenshot shows the IQdesktop - ImageQuest application window. The main area displays search results for files created between 10/9/2011 12:00:00 AM and 10/26/2011 12:00:00 AM. The results table is as follows:

File Name	Page Count	Document Type	Document Group
10/26/2011...	2	Invoice	Public Group
10/26/2011...		Folder Import	Public Group

The preview pane on the right displays an invoice from Sam's Electrical. The invoice details are as follows:

Invoice

Sam's Electrical
 Company ID: 9112333 Tax ID: 1122233
 Contact Name: Sam Smith
 Telephone: (505) 222-4444
 Business Fax: (505) 222-4444
 email@samselectrical.com
 10 Riverside Street, Portland, OR

Invoice Number: 112
 Date: 10/11/11
 Order Number: 115
 Order Date: 10/26/11
 Description: Fix to shop lobby switch

Issued To: **Joe's Fish Shop**
 Contact Name: Joe Smith
 Business Telephone: 202 315 2233
 Business Fax: 512 464 6556
 Suite 4, 72 South Road, Fishers, IN

Ship To: **Joe's Fish Shop**
 Contact Name: Joe Smith
 Business Telephone: 202 315 2233
 Business Fax: 512 464 6556
 Suite 4, 72 South Road, Fishers, IN

Description	Qty	Unit	Price	Total	Tax	Other
12000 Lbs. white, white	1	EA	\$100.00	\$100.00	\$0.00	\$0.00
Net Amount				\$100.00		
Tax Total				\$10.00		
Grand Total				\$110.00		
Amount Paid				\$60.00		
Amount Due				\$50.00		

Preferred Payment Methods
 Cash On Delivery, Direct Bank Transfer

Direct Bank Transfer Details
 Bank Name: First National Bank Account Name: Sam's Electrical Business Account
 Branch Name: Main Branch Branch Number: 111-444
 Account Type: Savings Account Number: 12345678

Payment History
 Invoice Number: 112 Invoice Date: 10/11/11 Invoice Total: \$110.00
 Payment Number: 1 Payment Date: 10/26/11 Payment Total: \$60.00

Thank you for your business. An discussed labor includes the 10% discount as promised.

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At the bottom of the window, the status bar shows: User: gblachstein Cabinet: ImageQuest Server: 2k8x86b.development.com

Note: Documents that are larger than 50MB will not show in the preview pane for performance reasons and instead will display a message asking the user to launch the associated application instead.

Enhanced File Import

The same preview handler technology that is used to display the preview pane has also been used to enhance the file import feature in IQdesktop. After clicking the import button in IQdesktop, you are now presented with a preview of the document during indexing. An additional option has also been added which allows the user to bypass the OCR process if need be.

Import to ImageQuest

Invoice 112.tif

Select Document Type: Invoice

Document Group: Public Group

Invoice Number: []

Paid

Vendor: []

Invoice Date: []

Invoice Total: []

Priority: []

Page: 1 of 2 Zoom: Entire Page Rotate 90°

Invoice

Sam's Electrical
 Company ID: 8111222 Tax ID: 11222333
 Contact Name: Sam Smith
 Telephone: (555) 222-4444
 Business Fax: (555) 222-4445
 sam@sams-electrical.com
 15 Bountiful Street, Plentysville

Invoice Number	112
Reference	
Date	10/11/08
Terms (days)	15
Due Date	10/26/08
Description	Fix to shop safety switch

Issued To: **Joe's Fish Shop**
 Contact Name: Joe Smith
 Business Telephone: 222 111-2233
 Business Fax: 123 444-5555
 Suite 4, 12 Smith Road Fishville

Ship To: **Joe's Fish Shop**
 Contact Name: Joe Smith
 10 Fishery Way, Fishville

Description	Qty / Unit	Type	Price per Unit	Discount %	Total	Tax	Gross
1 Labor	1.0	Hour	\$180.00	10.0%	\$162.00	\$4.00	\$166.00
2 Y1232 Type safety switch	2.0	Each	\$45.00	5.0%	\$85.50	\$9.00	\$94.50

Net Amount	\$180.00
Total Tax	\$18.00
Grand Total	\$198.00
Amount Paid	\$50.00
Amount Due (USD)	\$148.00

Preferred Payment Methods
 Cash On Delivery Direct Bank Transfer

Direct Bank Transfer Details:

Bank Name	First Fictional Bank	Account Name	Sam's Electrical Business Account
Branch Name		Branch Code	111-444
Account Type	Savings	Account Number	12345678

Payment History

Invoice Number	Invoice Date	Description	Payment Method	Total Tax	Grand Total
2008-14	08/25/08	Payment for Invoice 112	Check	\$4.00	\$50.00

Thank you for your business. As discussed labor includes the 10% discount as promised.

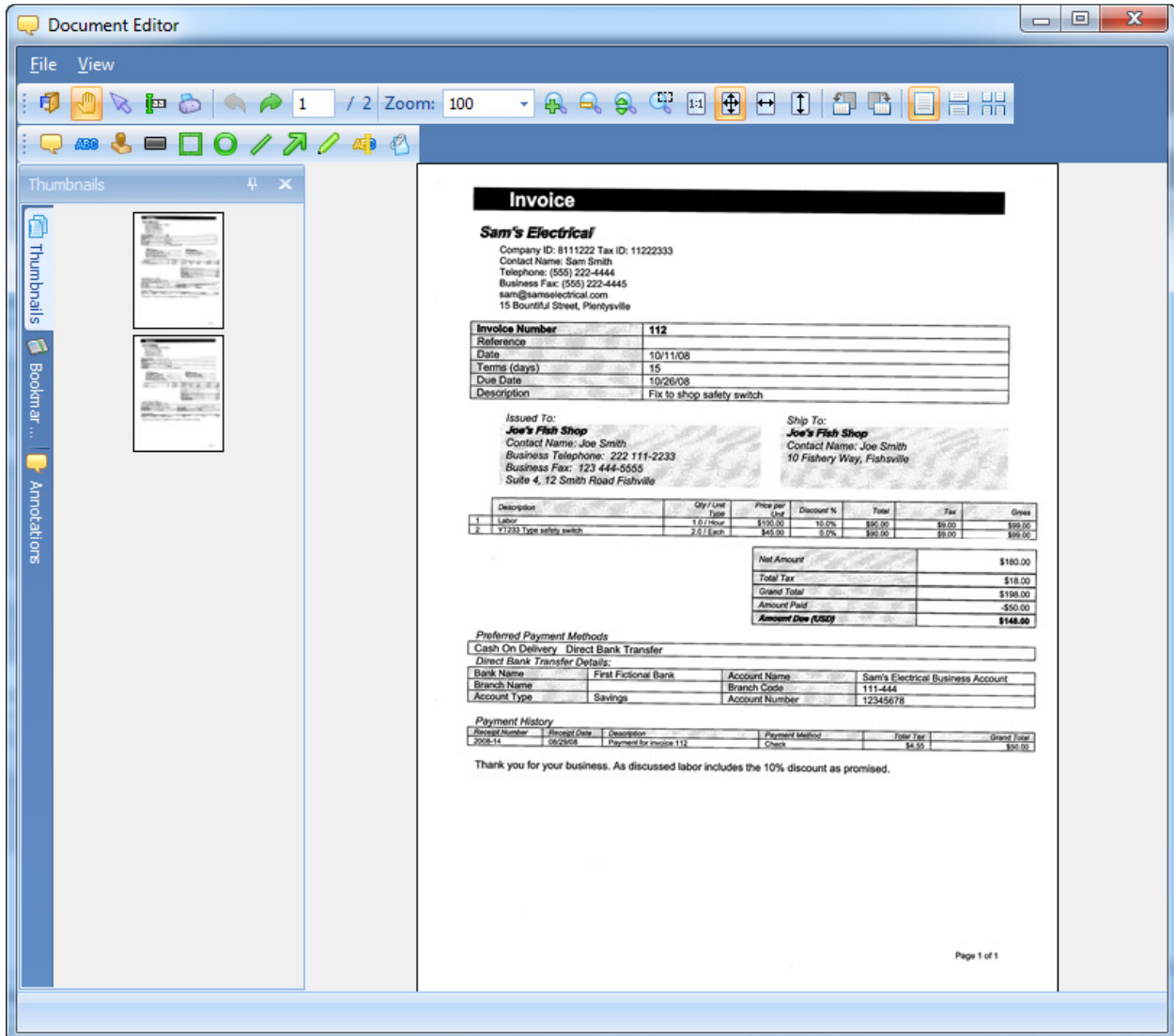
Page 1 of 1

Perform text extraction or OCR for keyword searching.

OK Cancel

PDF Annotation

























It is now possible to add annotations and markups to PDF documents from within the IQdesktop client without the need for third party tools. In order to use this feature, the ImageQuest user must have the “Annotate Document Image” permission. To create a new annotation, right-click on a .PDF file and select “Annotate” from the menu.



The three tabs along the left allow the user to switch between thumbnail view, bookmarks and a list of annotations on the document. Once the document has been saved, it will become the latest revision and the new active document when viewing the image.

Note: Annotations cannot be edited nor deleted once the document has been saved.

The following table describes the toolbar buttons that are used in the document editor:

	Saves the annotations and closes the form
	Pan document tool – click and hold the left mouse button to move the image
	Select annotations – use this tool to select and edit annotations
	Select text – click to select text on the page
	Print – prints the document
	Previous page
	Next page
	Zoom in – click the page to zoom in
	Zoom out – click the page to zoom out
	Dynamic zoom – click and drag up to zoom in, drag down to zoom out
	Marquee zoom – draw a box to define the zoom area
	Actual size – zoom to the actual size of the document
	Fit entire page – zoom to fit the entire page to the viewer
	Fit width – zoom to fit the document width in the viewer
	Fit height – zoom to fit the document height in the viewer
	Rotate left – rotates the page 90 degrees counter-clockwise
	Rotate right – rotates the page 90 degrees clockwise
	Single page layout – display a single page at a time in the viewer
	Continuous page layout – display pages as a list in the viewer
	Two columns – display the pages in two continuous columns
	Comment – creates a comment annotation
	Text box – creates a text box annotation
	Stamp – creates a predefined rubber stamp annotation such as DRAFT or CONFIDENTIAL
	Black box – creates a solid black box annotation
	Rectangle – draws a rectangle annotation
	Ellipse – draws an ellipse annotation
	Line – draws a line annotation
	Arrow – draws an arrow annotation
	Ink pen – draw freehand ink pen markings on the page
	Highlighter – draws a yellow opaque highlighter box annotation
	File attachment – embed a file attachment annotation into the document

Work Queue

Formally known as the route list, the Work Queue displays a list of documents that were either manually routed from another IQ user or were automatically created by a notification rule that was setup by the IQ administrator. Documents that were routed to a role will be visible to all members of that role. The Work Queue can be used to process documents that require some type of intervention.

The screenshot shows the ImageQuest Work Queue interface. The main window displays a table of invoices with the following data:

Invoice Num	Invoice Total	Vendor	Invoice Due Date	Paid	Action
112	\$148.00	Sam's Electrical	10/30/2011	<input type="checkbox"/>	Invoice Payment Due Soon
1156	\$941.10	Verizon Wireless	10/31/2011	<input type="checkbox"/>	Invoice Payment Due Soon
1156	\$941.10	Verizon Wireless	10/31/2011	<input type="checkbox"/>	Routed to Accounts Payable (Role)

Below the table is a History log showing the following events:

Action	Event Date	User Name
Work Item Created	10/27/2011 2:50:45 PM	gblachstein
Save	10/27/2011 12:03:40 PM	gblachstein
Work Item Created	10/27/2011 11:33:44 AM	System
Save	10/27/2011 10:58:18 AM	gblachstein
Save	10/27/2011 10:58:09 AM	gblachstein

The interface also includes a sidebar with navigation options like Search, Indexing, Lists, Work Queue, Watch List, Import, and Scan. The status bar at the bottom shows: User: gblachstein, Cabinet: ImageQuest, Server: 2k8x86b.development.com.

For example, a notification rule can be created which searches for invoices that need to be paid by the invoice due date, and then sends the document to the Work Queue ten days before the due date occurs. All documents in the Work Queue will stay there until the work item is manually completed by a user. In this example, one of two things needs to be changed in order to process the document: Either the Invoice due date needs to be extended beyond the 10 day notification period, or the Paid attribute needs to be updated to true.

To process a document in the work queue, right-click on the record and select “Complete Work Item”.

The screenshot shows a 'Complete Work Item' dialog box with the following fields and values:

- Document Type: Invoice
- Route To: (None)
- Document Group: Public Group
- Invoice Number: 112
- Paid
- Vendor: Sam's Electrical
- Invoice Due Date: 10/30/2011
- Invoice Total: \$148.00
- Notes: (Empty text area)
- Buttons: Save, Cancel

A window will open which looks exactly like the edit document screen. The main difference is that saving these changes will cause the document to be removed from the work queue, even if nothing has been modified.

Note: If you complete the work item and do not change any of the attributes, it could possibly reappear again if it still meets the criteria of a notification rule.

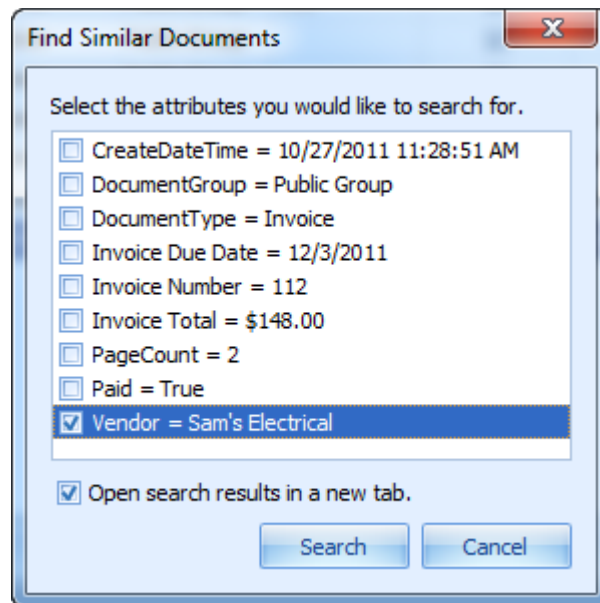
There is a special column in the Work Queue called “Action” that shows how the document arrived. It will either show the name of the notification rule that was responsible for routing the document, or it will display a message that indicates it was manually routed to a specific user or role.

It is also worth noting that a single document can be displayed in the Work Queue multiple times for different reasons and each instance needs to be processed separately. Also, users must have the Update Document permission in order to complete work item requests.

Note: The delete function in the Work Queue functions the same as it does from the search grid. If you delete a document from the Work Queue, it will be flagged as a deleted document and will no longer show up in search results. The Complete Work Item option is the only way to remove the document from the Work Queue properly.

Find Similar Documents

Find Similar provides an easy way to perform searches based on the results of a previous search query. For example, a search is performed which returns a list of paid invoices for the current month. What if a user wants to search for all invoices from a particular vendor that are displayed in the search results? If a user right-clicks on the “Vendor” attribute cell in the grid and selects “Find Similar”, a new dialog box will pop up.



Notice that Vendor has been automatically checked. If the user had right-clicked on the “Invoice Number” cell, that field would have been checked by default instead. Clicking the search button at this point would do a new search where Vendor is equal to “Sam’s Electrical”. Additional attributes can also be selected as well to “AND” the results together.

