



Administrator's Guide

Version 12.0



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Introduction to ImageQuest

Welcome to ImageQuest!

The ImageQuest product line is a complete enterprise content management system consisting of document/file management, forms processing and workflow components. ImageQuest is designed to facilitate access to and the distribution of document-oriented information within your organization. By putting documents at your fingertips and leveraging the related data, ImageQuest will improve efficiency while helping you deliver better service.

Informa Software has a strong commitment to customer service and product quality. If you have questions, please contact an Informa Client Services Representative immediately. Thanks for using ImageQuest and please share your ideas on how we can make ImageQuest better for everyone.

Please contact us below for technical support and/or troubleshooting:

ImageQuest Support

(800) 859-2203

(716) 852-2203

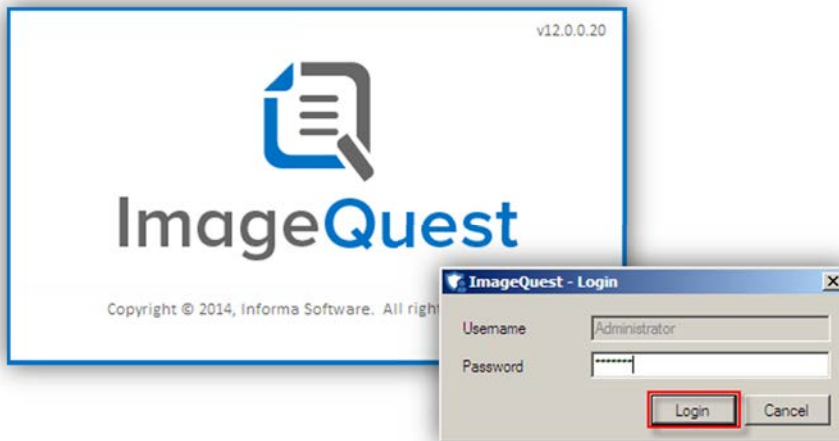
info@QLS.com

<http://www.QLS.com/IQmfp>

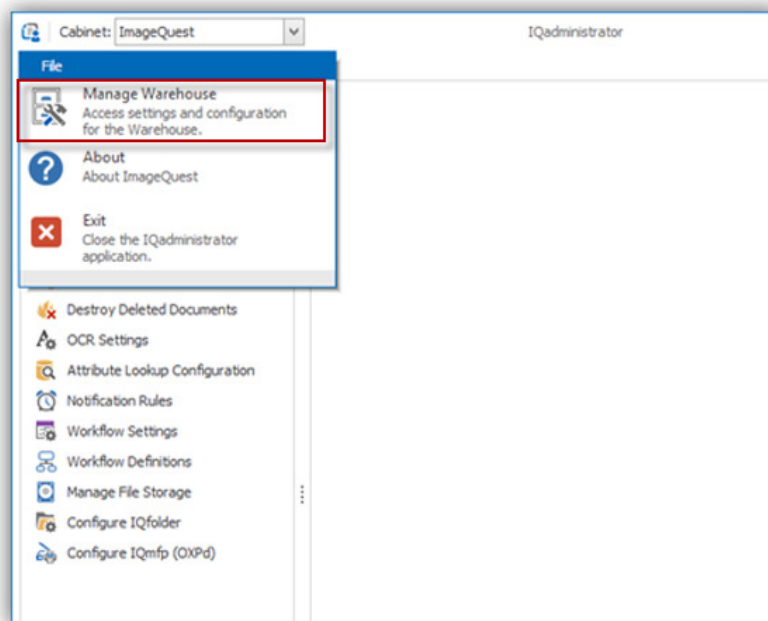
IQadministrator

Manage Warehouse

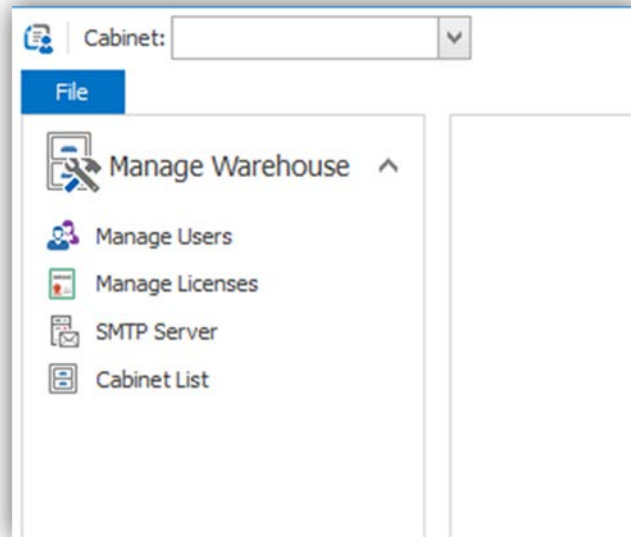
To access IQadministrator after the server installation, go to Start > All Programs > Informa Software > ImageQuest > IQadministrator and enter the Administrator password. If this is the first time running IQadministrator, you will be prompted to create the password. Click “Login” as illustrated below.



The main *IQadministrator* screen will open as shown below. Go to the “File” tab and click “Manage Warehouse”.



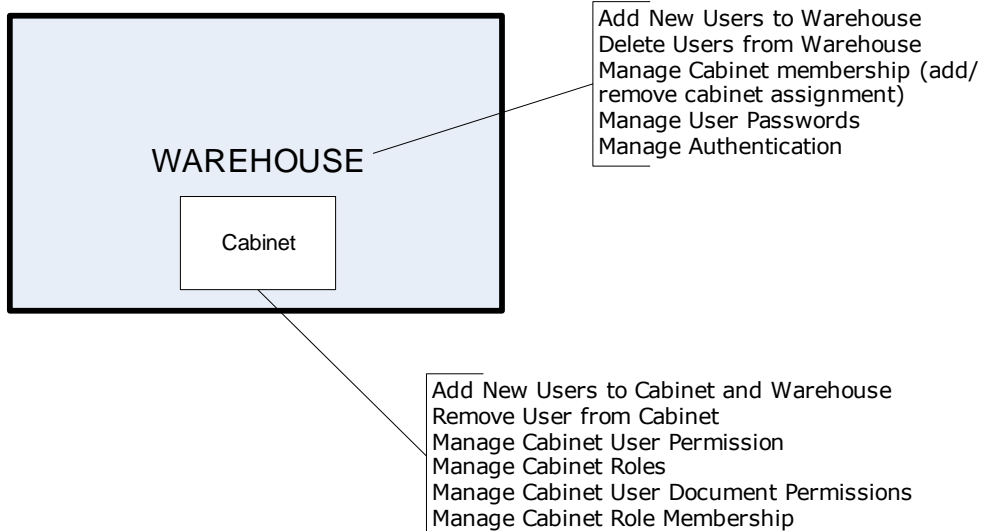
The following features may be accessed from the “Manage Warehouse” window: Manage Users, Manage Licenses, SMTP Server, and the Cabinet List as displayed below.



Manage Users

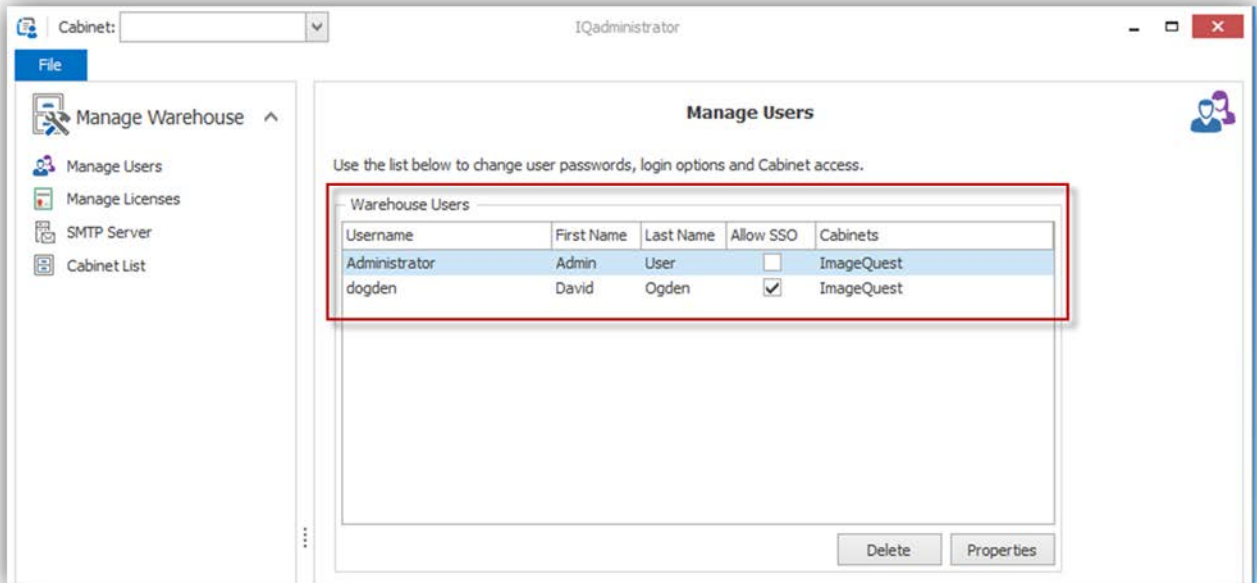
Anyone who will need to access ImageQuest will need to be added as a user in the *IQadministrator*.

Users can be managed at the Warehouse and the Cabinet levels. The Warehouse manages all users of the system, and their Cabinet memberships. New users can be created at the Warehouse level, and then added to a Cabinet; or a user can be created at the Cabinet level, and will automatically be added to the Warehouse. See below.



If a user is removed from a Cabinet, that user is still a member of the Warehouse. If a user is deleted from the Warehouse, that user is permanently deleted and removed from all Cabinets.

Manage Users allows the Administrator to change user passwords, login options and Cabinet access. The screenshot below shows an example of the Warehouse user list.



Note: The Administrator User is created by default with cabinet access and can be modified but cannot be deleted.

Adding New Users

To add a new user to the Warehouse, select **Manage Users** in the “Manage Warehouse” window.

Enter the name of the user in the “Username” field and the Domain in the “Domain Name” field. When creating a new user, click the checkbox to “Allow this user to authenticate with their Active Directory credentials”; if you wish to use the user Single-Sign On (SSO) method. See the **Single Sign-On (SSO) Overview** on page 12 for more information. Click “Add User” at the bottom right to finish adding the new user.

New User Information

Username: jsmith

First name: John

Last name: Smith

Password: ****

Confirm Password: ****

☒ Allow this user to authenticate with their Active Directory credentials.

Domain Name: USACompany

Email Address: jsmith@usacompany.com

☒ Send email notifications to this user

Add User

See below for information about user options.

New User Information	Definition
Username	The name of a user assigned in the cabinet (i.e. "jsmith," "dogden")
First Name	The first name of the user
Last Name	The last name of the user
Password	An access code assigned to or established by a user (i.e. case sensitive, and a combination of letters and numbers).
Confirm Password	Verify the created password.
Allow the user to authenticate with their Active Directory credentials	Activates Single Sign-On (SSO) for a user which does NOT require a password.
Domain Name	Enter the network's NETBIOS domain name
Email Address	Enter the user's email address for routing notifications (i.e. jsmith@usacompany.com)
Send email notifications to this user	Activates document routing notification per user through ImageQuest.

Note: Routing notifications require further mail configuration. See page 16 for more information.

Single Sign-On (SSO) Overview

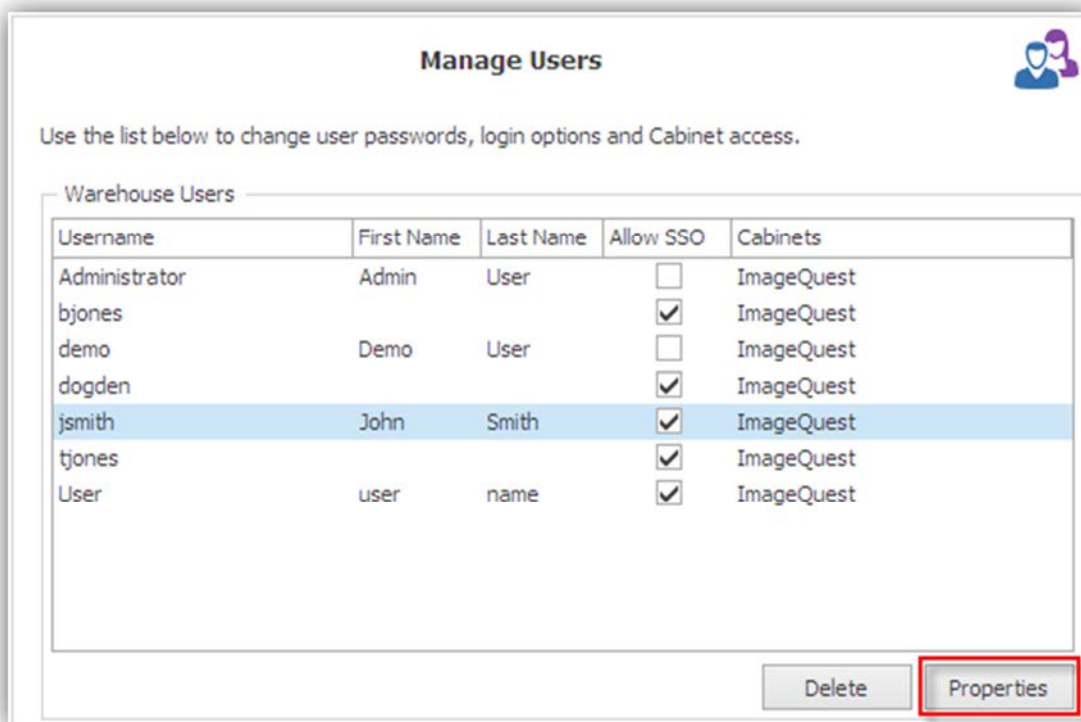
ImageQuest gives the Administrator the option of allowing users to authenticate with their Active Directory credentials using Single Sign-On (SSO).

When a user logs into their workstation using their domain account, and they have appropriate permissions, they can access the ImageQuest client programs without providing a password.

If SSO is not selected for a user, the user will need to provide a username and a password (optional) as determined by the Administrator to login to each ImageQuest application; this allows a user to login as a user that is different than the user account used to login to the client workstation and it also accommodates networks without a domain controller.

Note: If the user will authenticate with their Active Directory credentials, the Username must match the user's Active Directory login name. SSO is selected by default. Uncheck the checkbox for Active Directory credentials to deactivate SSO for a user and specify a password for the user instead; blank passwords are also allowed for non-SSO users.

The new user is now listed under Warehouse Users along with the new user's SSO status and the Cabinet assignment as displayed below. Once a user is created, you may manage user information by highlighting a Username and clicking "Properties".



Manage Users

Use the list below to change user passwords, login options and Cabinet access.

Warehouse Users

Username	First Name	Last Name	Allow SSO	Cabinets
Administrator	Admin	User	<input type="checkbox"/>	ImageQuest
bjones			<input checked="" type="checkbox"/>	ImageQuest
demo	Demo	User	<input type="checkbox"/>	ImageQuest
dogden			<input checked="" type="checkbox"/>	ImageQuest
jsmith	John	Smith	<input checked="" type="checkbox"/>	ImageQuest
tjones			<input checked="" type="checkbox"/>	ImageQuest
User	user	name	<input checked="" type="checkbox"/>	ImageQuest

Delete Properties

Manage User Information

The Administrator can add or change user information and add or remove cabinet access if required. See the example below.

The screenshot shows a 'Manage Users' dialog box. At the top, it says 'Manage Users'. Below that, it says 'User information for jsmith'. There are several input fields: 'Current Password' (masked with asterisks), 'New Password', 'Confirm Password', 'First Name' (filled with 'John'), and 'Last Name' (filled with 'Smith'). Below these are two checkboxes: 'Allow this user to authenticate with their Active Directory credentials.' (checked) and 'Send email notifications to this user' (checked). There are also fields for 'Domain Name' (filled with 'USACompany') and 'Email Address' (filled with 'jsmith@usacompany.com'). Below these is an 'IMPORTANT' warning: 'Removing access to a cabinet for a user will cause them to lose all permission assignments, role membership and watch list entries in that cabinet.' At the bottom, there is a 'Cabinet Access' section with a list box containing 'ImageQuest' (checked). At the very bottom are 'Done' and 'Cancel' buttons.

Manage Users

User information for jsmith

Current Password: *****

New Password:

Confirm Password:

First Name: John

Last Name: Smith

☒ Allow this user to authenticate with their Active Directory credentials.

Domain Name: USACompany

Email Address: jsmith@usacompany.com

☒ Send email notifications to this user

IMPORTANT: Removing access to a cabinet for a user will cause them to lose all permission assignments, role membership and watch list entries in that cabinet.

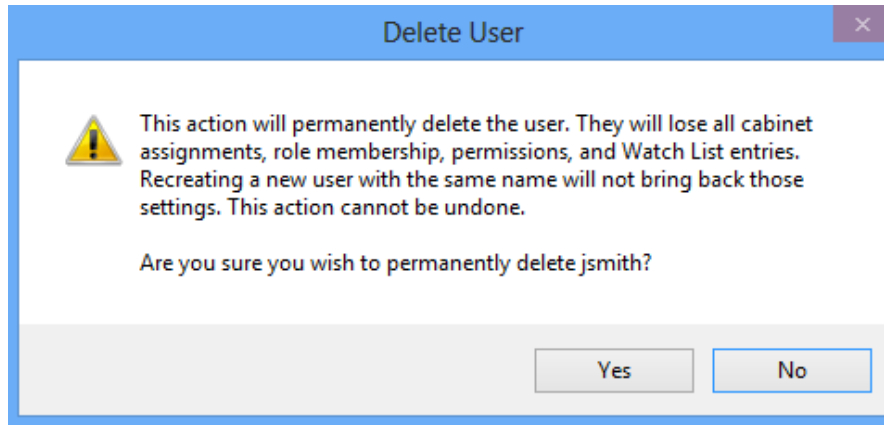
Cabinet Access

☒ ImageQuest

Done Cancel

Deleting a User

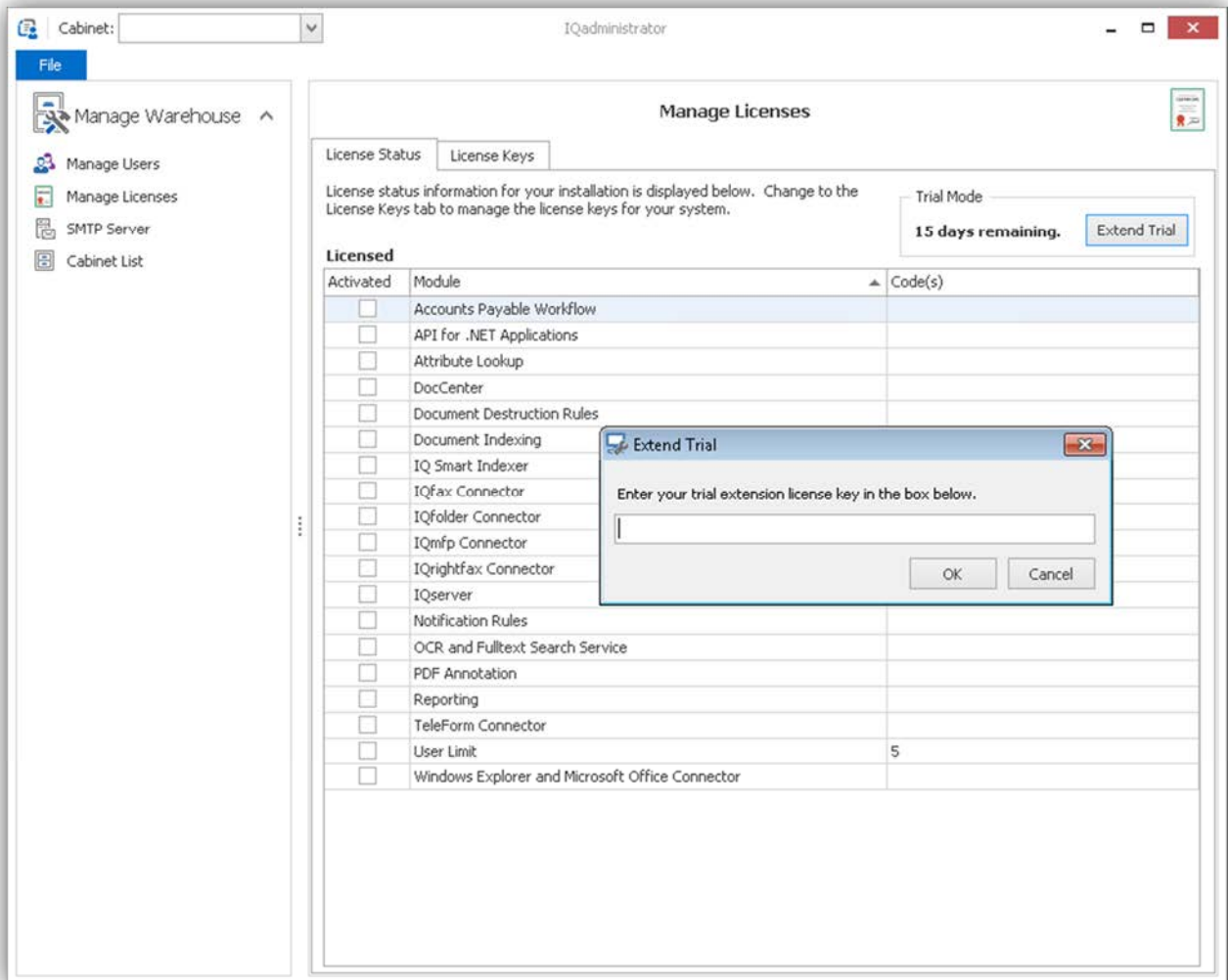
To delete a user from the Warehouse and from all Cabinets, highlight the username and click “Delete”. Deleting a user from the Warehouse cannot be undone; this function will permanently delete the user and remove the user from all Cabinet assignments, role membership, permissions and the Watch List entries. You will be prompted with the message as illustrated below to confirm the user you intend to delete.



Note: A user can be added or removed from a cabinet, but still appear as a user in the warehouse. If the user is removed from a cabinet, he or she will no longer have access rights to the cabinet, and will not appear as a cabinet user.

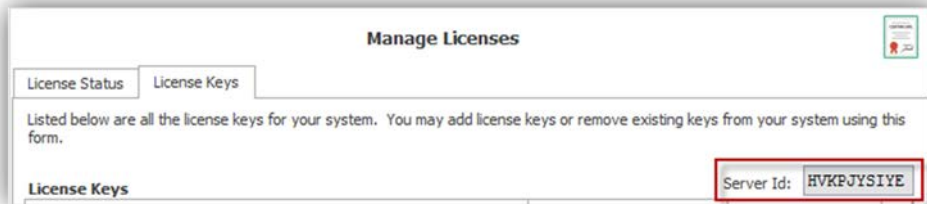
Manage Licenses

The ImageQuest Warehouse accommodates multiple license keys. To view and manage license information in the Warehouse, click Manage Licenses. The “License Status” tab displays information on your installations. When ImageQuest is first installed, there is a 15-day trial period for all modules. If you have requested and received an extended trial license key from Informa Software Support, click “Extend Trial” and enter the extension key. See screenshot below.



Note: The “Extend Trial” feature is only available on the ImageQuest server machine, not on the ImageQuest client machine.

To request a license key from *Informa Software Support*, you will need to email the Server ID, any current license keys and the serial number(s) of any HP MFP devices that will be applied to support@informasoftware.com. See below. Click on the “License Keys” tab in the **Manage Licenses** screen. The Server ID is located in the top, right corner of this screen, and may be copied and pasted into the email to *Informa Software Support*.



Manage Licenses

License Status | **License Keys**

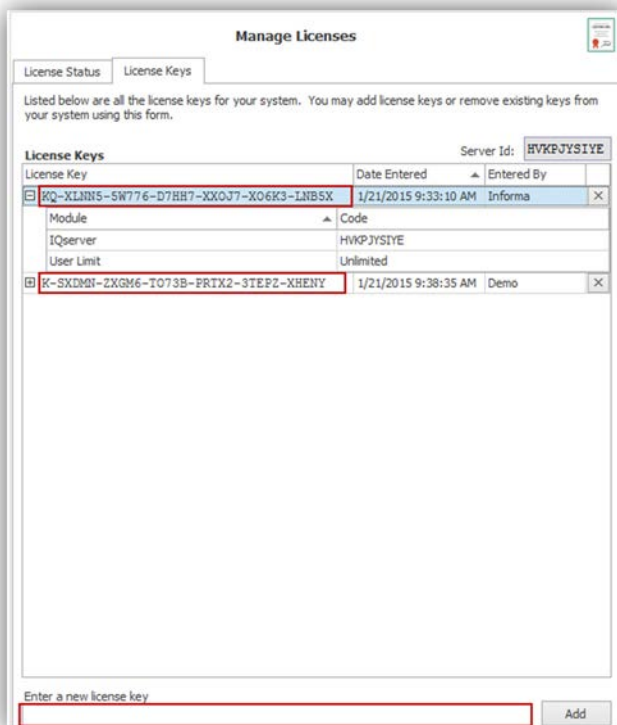
Listed below are all the license keys for your system. You may add license keys or remove existing keys from your system using this form.

License Keys

Server Id: **HVKPJYSIYE**

Once the license key code is received, copy the key code and paste it into the “Enter a new license key” field as highlighted below and click “Add”.

Click the “+” and “-” boxes to expand or collapse the list of features in the Warehouse that are licensed. In the screenshot below, license keys have been entered by both “Informa” and “Demo” users. “Entered by” reflects which Windows user added the key.



Manage Licenses

License Status | **License Keys**

Listed below are all the license keys for your system. You may add license keys or remove existing keys from your system using this form.

License Keys

Server Id: **HVKPJYSIYE**

License Key	Date Entered	Entered By	
IQ-XLNN5-SW776-D7HH7-XXOJ7-XO6K3-1NB5X	1/21/2015 9:33:10 AM	Informa	X
<div>Module</div> <div> <div>IQserver</div> <div>User Limit</div> </div> <div> <div>Code</div> <div>HVKPJYSIYE</div> <div>Unlimited</div> </div>			
K-SXDMN-ZXGM6-TO73B-PRIX2-3TEFZ-XHENY	1/21/2015 9:38:35 AM	Demo	X

Enter a new license key

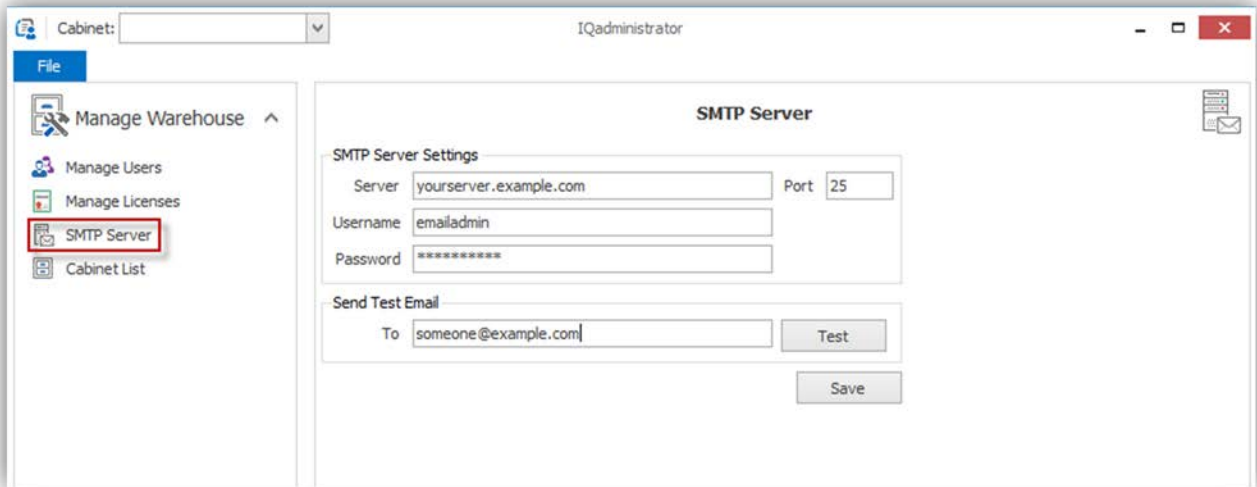
Add

Note: To delete a license key, click the  next to the license key to be deleted.

SMTP Server

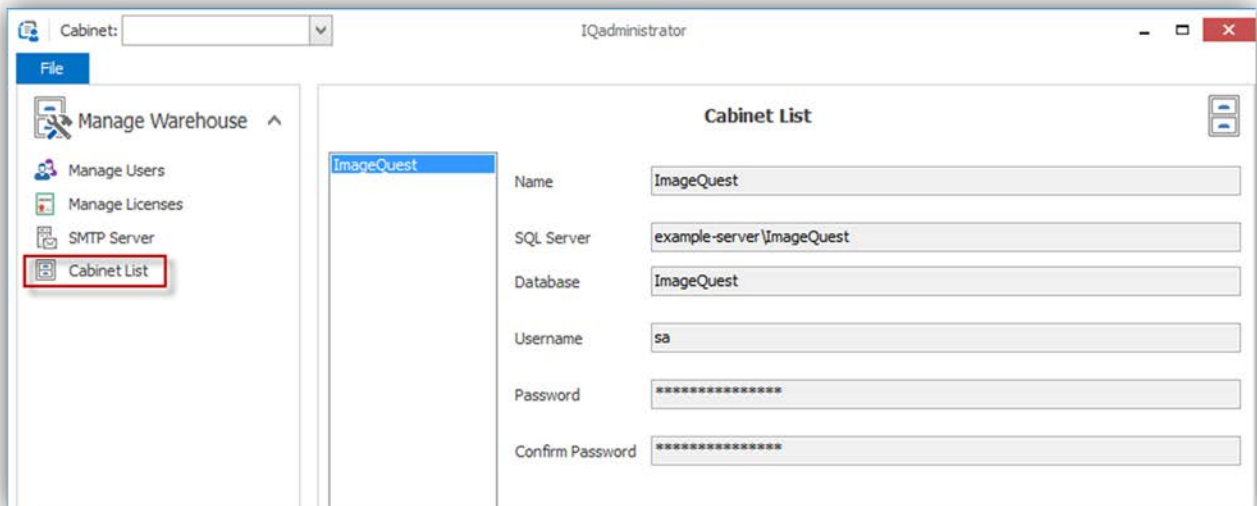
The SMTP Server menu allows the administrator to configure the SMTP Server Settings for ImageQuest email routing notifications and send a test email to confirm the settings are valid.

This SMTP Server feature is available in IQadministrator under File > Manage Warehouse > SMTP Server.



Cabinet List

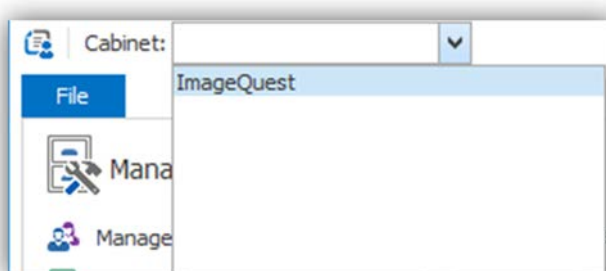
The **Cabinet List** displays the current ImageQuest Cabinet information. To access the **Cabinet List** window, click **Cabinet List** in the “Manage Warehouse” menu as shown below.



Manage ImageQuest

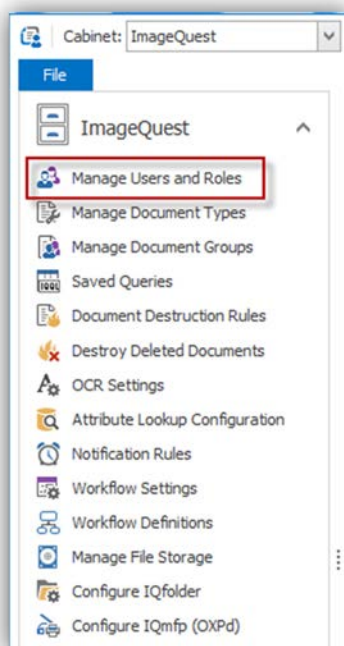
Manage ImageQuest allows the administrator to add and configure cabinet users, document types, document groups and HP MFP devices. They can also create queries for frequently used IQ searches, manage the IQ file storage location and configure folders for use with IQfolder.

To return to Cabinet Management from the Warehouse, click the drop-down arrow next to “Cabinet” and choose **ImageQuest** or the Cabinet name from the list as shown below.



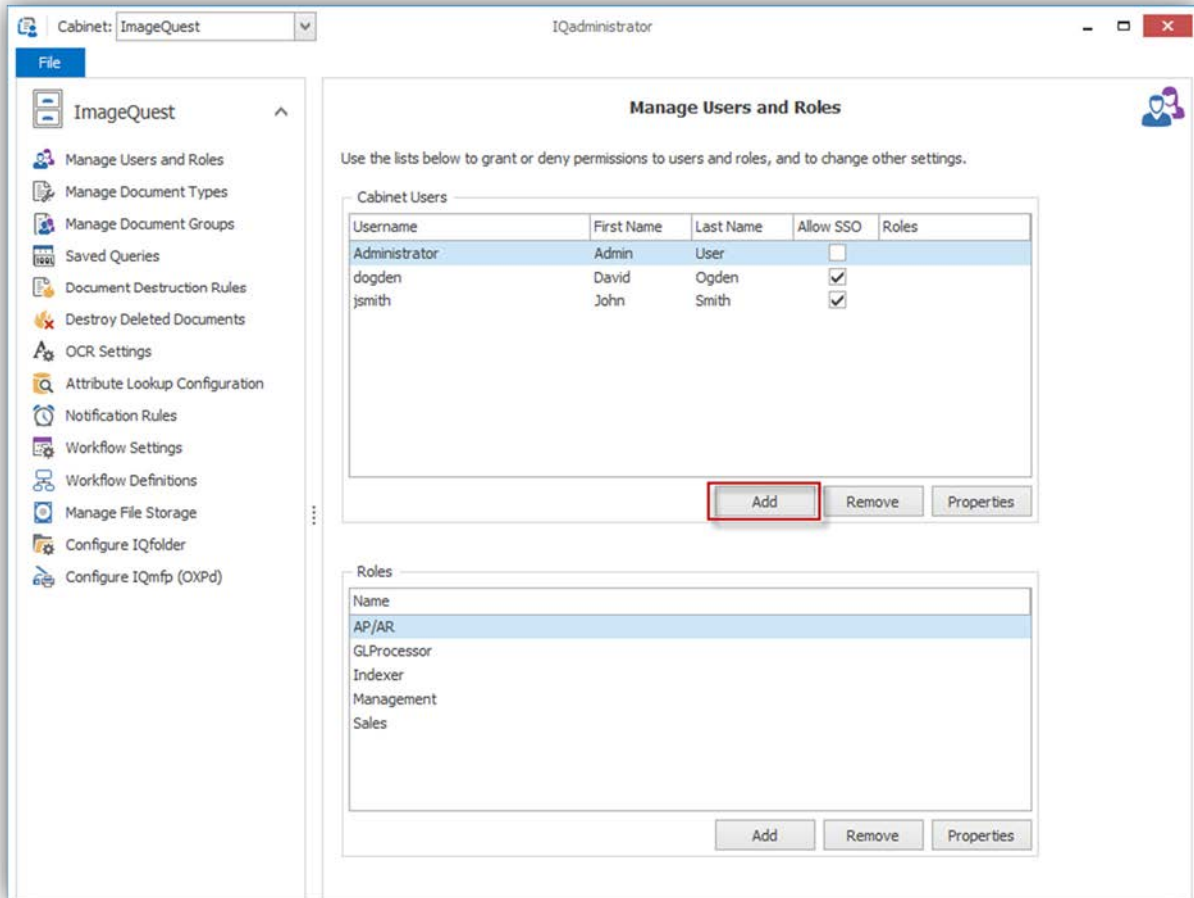
Manage Users and Roles

To add a new user in the ImageQuest Cabinet, select **Manage Users and Roles** as shown below.



Any users that have been added through the Warehouse and are members of the ImageQuest Cabinet will be listed in Cabinet Users as displayed on the next page.

Note: When a new user is created in the Cabinet, the new user is also created at the Warehouse level.



Click “Add” as shown above to add a new user to the Cabinet. An existing user can be chosen from the Warehouse list or a new user can be created at this time.

To create a new user, enter the name of a user in the “Username” field and the First Name/Last Name fields as illustrated on the following page. Click “Next” to manage user permission and role memberships. Select “Done” to finish creating the new user.

Review **New User Information** on Page 11 before entering new user information in the fields shown below.

The screenshot shows the 'Manage Users and Roles' window in the ImageQuest Administrator. The left sidebar lists various management tasks, with 'Manage Users and Roles' at the top. The main area has two radio buttons: 'Add an existing user.' (unselected) and 'Create a new user.' (selected and highlighted with a red box). Below the radio buttons, there is a dropdown menu showing 'All users currently have access to the cabinet.' The form fields for creating a new user are as follows:

- Username: tjones
- First name: Tom
- Last name: Jones
- Password: ****
- Confirm Password: ****
- ☒ Allow this user to authenticate with their Active Directory credentials.
- Domain Name: USACompany
- Email Address: tjones@usacompany.com
- ☒ Send email notifications to this user

At the bottom right, there are two buttons: 'Next' (highlighted with a red box) and 'Cancel'.

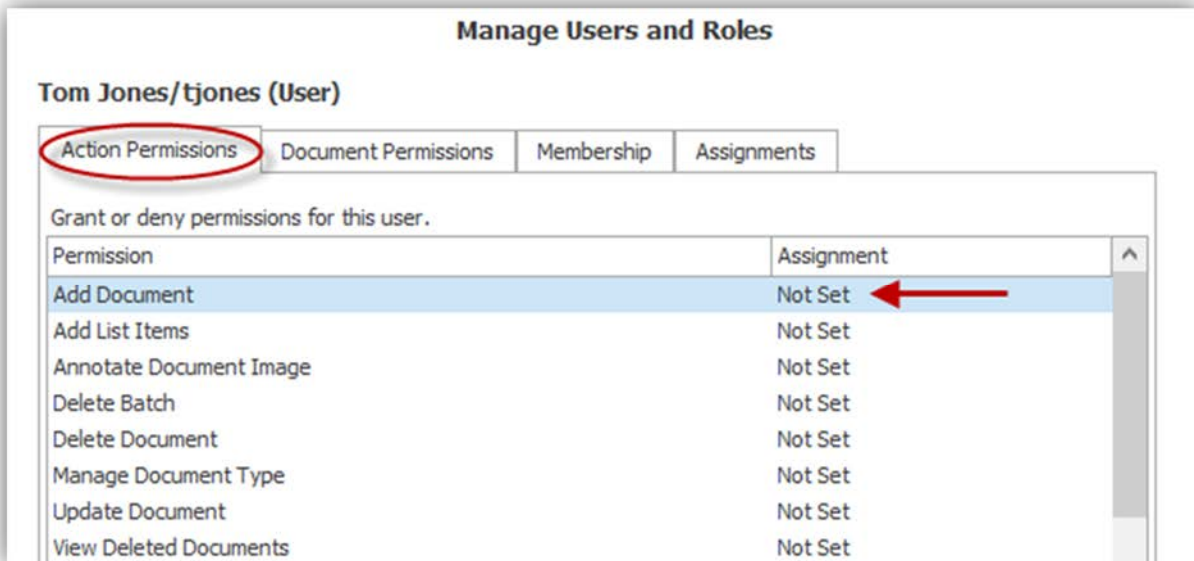
Note: If the user will authenticate with their Active Directory credentials, the Username must match the user's Active Directory login name. SSO is selected by default. Uncheck the checkbox for Active Directory credentials to deactivate SSO for a user and specify a password for the user instead; blank passwords are also allowed for non-SSO users.

New User Properties and Permissions

ImageQuest features the following action permissions for users and roles:

Action Permission	Description
Add Document	Allows a user to add documents to the Cabinet through any IQ client application.
Add List Items	Allows a user to add a "List-based" attribute on the fly.
Annotate Document Image	Allows a user to add annotations to a PDF document from IQdesktop.
Delete Batch	Allows the user to delete a batch from the "Indexing Queue."
Delete Document	Allows a user to delete or undelete a document from <i>IQdesktop</i> .
Manage Document Type	Allows a user to add, remove and/or edit Document Types and Attributes from IQdesktop.
Update Document	Allows a user to add document revisions and to edit document attribute values.
View Deleted Documents	Allows a user to view deleted documents.
View Only	Disables documents from launching in their native program and loads the documents in a Read-Only viewer.
View Prior Revisions	Gives users the ability to view older versions of a document by right-clicking the revision in the history pane and selecting "View Revision".
Work Queue Search	Allows users to search for and locate open work items in the system.

Once a new user is created, the new user's "Action Permissions" are "Not Set" by default as highlighted.

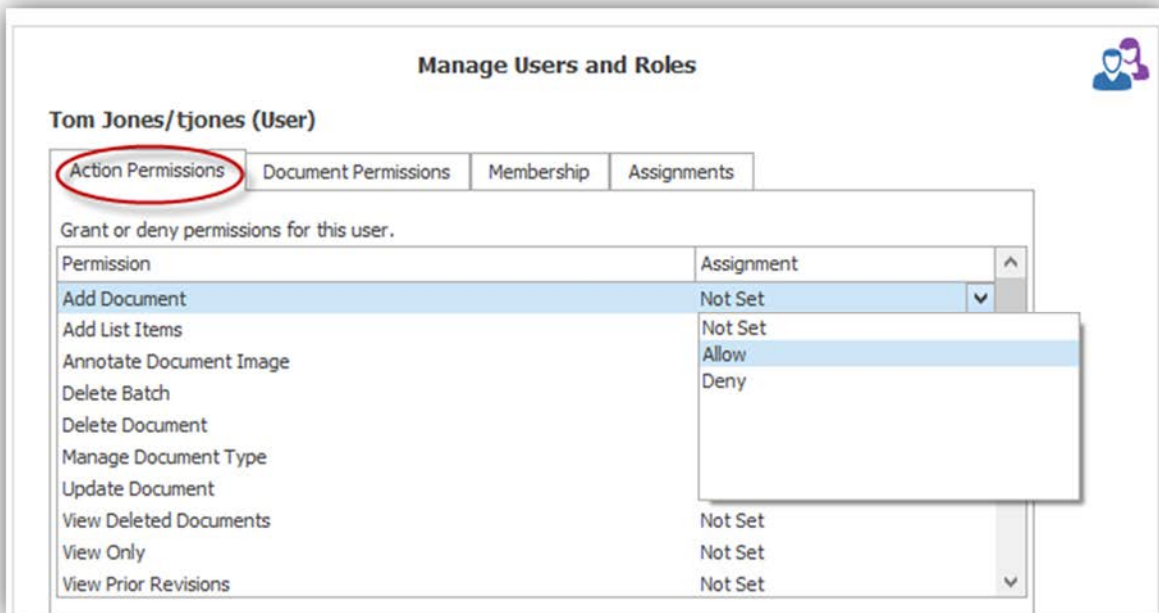
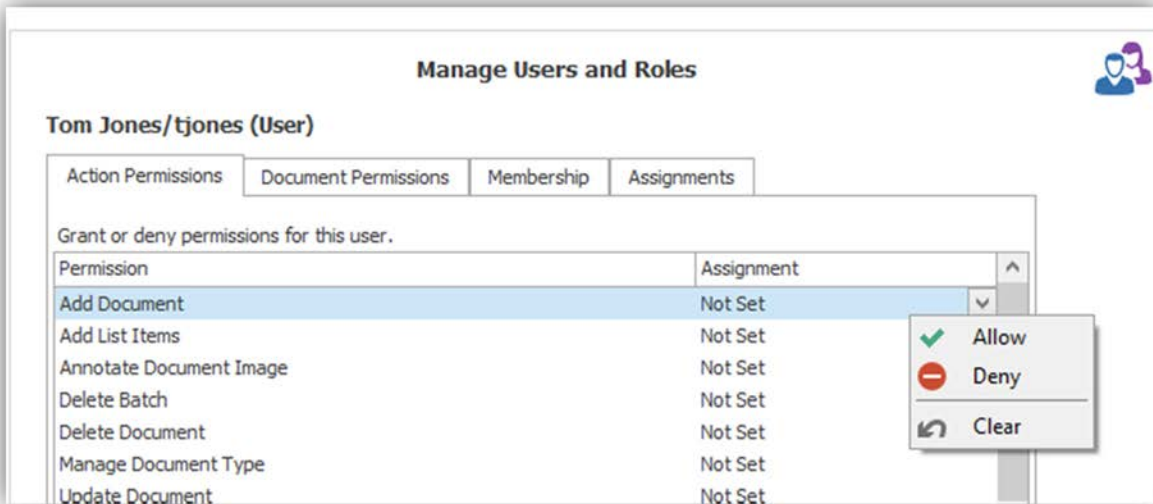


Note: The Administrator user's Action Permissions are all set to "Allow" by default except for the View Only Permission.

Before setting permissions, see the chart below to distinguish between "Not Set," "Allow" and "Deny".

Permission Assignment	Description
Not Set	Permission is neither allowed nor denied.
Allow	Gives users and roles access to action permissions and document types.
Deny	Explicitly blocks users and roles access to action permissions and document types.

Permissions can be set for each user by right-clicking to select the assignment or by left-clicking to activate the assignment drop-down as shown in the examples below.



Note: Permissions can also be set at the role level. To add roles and assign users, see “Adding New Roles”.

In the example below, “tjones” is granted the permission to “Add Document”, “Add List Items”, and “Annotate Document Image” but is denied permission to “Delete Batch” and “Delete Document”. The permissions for “tjones” for “Manage Document Type” is “Not Set”.

Manage Users and Roles

Tom Jones/tjones (User)

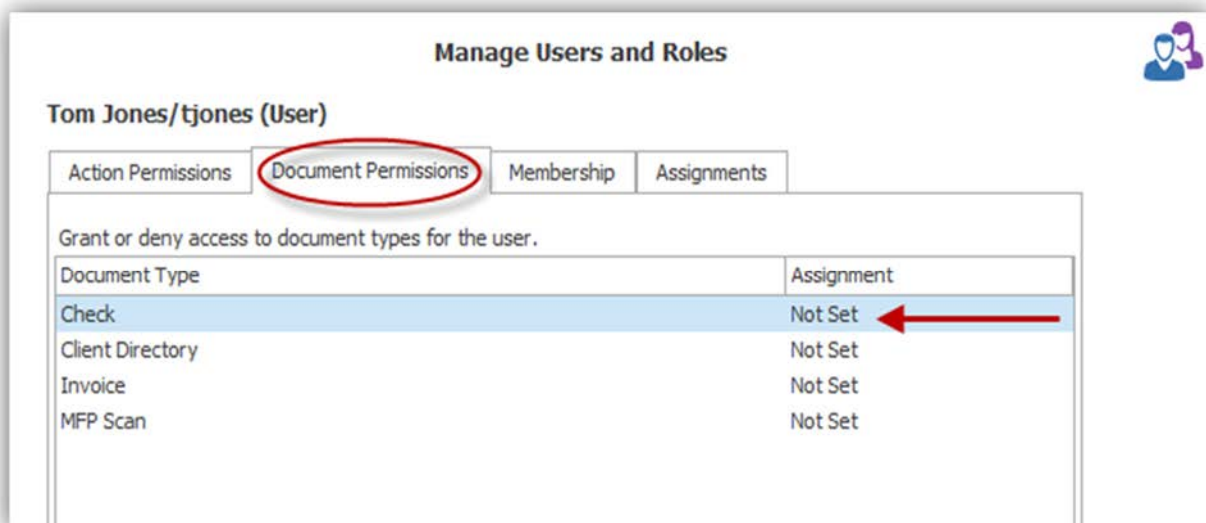
Grant or deny permissions for this user.

Permission	Assignment
Add Document	Allow
Add List Items	Allow
Annotate Document Image	Allow
Delete Batch	Deny
Delete Document	Deny
Manage Document Type	Not Set

To assign “Action Permissions,” see the permission grid for effective permissions below to effectively manage user and role permissions in the Cabinet.

User Permission	Role Permission	Effective Permission
Not Set	Not Set	Not Set
Not Set	Allow	Allow
Not Set	Deny	Deny
Allow	Not Set	Allow
Allow	Deny	Deny
Allow	Allow	Allow
Deny	Not Set	Deny
Deny	Allow	Deny
Deny	Deny	Deny

To set the “Document Permissions” for “tjones,” for example, click the “Document Permissions” tab. The user “tjones” will only have permissions to document types allowed to him or her. In the screenshot below, the “Document Permissions” are “Not Set”. Right-click on the permission(s) to select the assignment or left-click it to activate the assignment drop-down.



Manage Users and Roles

Tom Jones/tjones (User)

Action Permissions **Document Permissions** Membership Assignments

Grant or deny access to document types for the user.

Document Type	Assignment
Check	Not Set
Client Directory	Not Set
Invoice	Not Set
MFP Scan	Not Set

When assigning “Document Permissions,” be sure to see below to effectively manage user and role permissions in the cabinet.

Note: “Allow by Default” below refers to an option in Manage Document Types. See page 35 for more information.

User Permission	Role Permission	Allow By Default	Effective Permission
Not Set	Not Set	Not Set	Not Set
Not Set	Not Set	Allow	Allow
Not Set	Allow	Not Set	Allow
Not Set	Allow	Allow	Allow
Not Set	Deny	Not Set	Deny
Not Set	Deny	Allow	Deny
Allow	Not Set	Not Set	Allow
Allow	Not Set	Allow	Allow
Allow	Deny	Not Set	Deny
Allow	Deny	Allow	Deny
Allow	Allow	Not Set	Allow
Allow	Allow	Allow	Allow
Deny	Not Set	Not Set	Deny
Deny	Not Set	Allow	Deny
Deny	Allow	Not Set	Deny
Deny	Allow	Allow	Deny
Deny	Deny	Not Set	Deny
Deny	Deny	Allow	Deny

Membership

Roles must first be created in order for them to appear in the “Membership” tab; manage role membership on the “Membership” tab. To assign or remove role membership for a user, check the checkbox. As show below, “tjones” is assigned to the “Sales” role membership only. Click “Done” to complete.

The screenshot displays the 'Manage Users and Roles' window. At the top, the title 'Manage Users and Roles' is centered, and a user icon is in the top right corner. Below the title, the user 'Tom Jones/tjones (User)' is selected. There are four tabs: 'Action Permissions', 'Document Permissions', 'Membership', and 'Assignments'. The 'Membership' tab is active and highlighted with a red circle. Below the tabs, the instruction 'Assign or remove role membership for the user.' is shown. A list of roles is provided with checkboxes: 'AP/AR', 'GLProcessor', 'Indexer', 'Management', and 'Sales'. The 'Sales' role is checked and highlighted with a blue background. At the bottom right, a 'Done' button is highlighted with a red rectangle.

Note: Membership in one or more roles can change the effective permissions for a user. Each list at the bottom of the “Action Permissions” and the “Document Permissions” tabs represent the User’s effective action permissions.

Adding New Roles

When ImageQuest is first configured, the Administrator can add roles as a way to save time in assigning “Action Permissions” and “Document Permissions”. Cabinet users can be assigned to multiple roles; roles can also be created without document permissions for the purpose of controlling access to specific ImageQuest devices.

Creating a role for each department in your work environment may be valuable because individual departments usually handle different types of documents. For example, employees in the Sales Department may not need to find an Invoice from the power company, but the Accounting Department would. Alternatively, the Accounting Department will not be looking for Sales Brochures filed by the Sales Department. By creating an “Accounting” role and a “Sales Department” role, documents and permissions can be managed quickly within the *IQadministrator*.

To add a new role, click **Manage Users and Roles** as shown in below. The window displays “Cabinet Users” at the top and “Roles” at the bottom. Locate “Roles” and click “Add”.

Manage Users and Roles

Use the lists below to grant or deny permissions to users and roles, and to change other settings.

Cabinet Users

Username	First Name	Last Name	Allow SSO	Roles
Administrator	Admin	User	<input type="checkbox"/>	
dogden	David	Ogden	<input checked="" type="checkbox"/>	
jsmith	John	Smith	<input checked="" type="checkbox"/>	
tjones	Tom	Jones	<input checked="" type="checkbox"/>	Sales

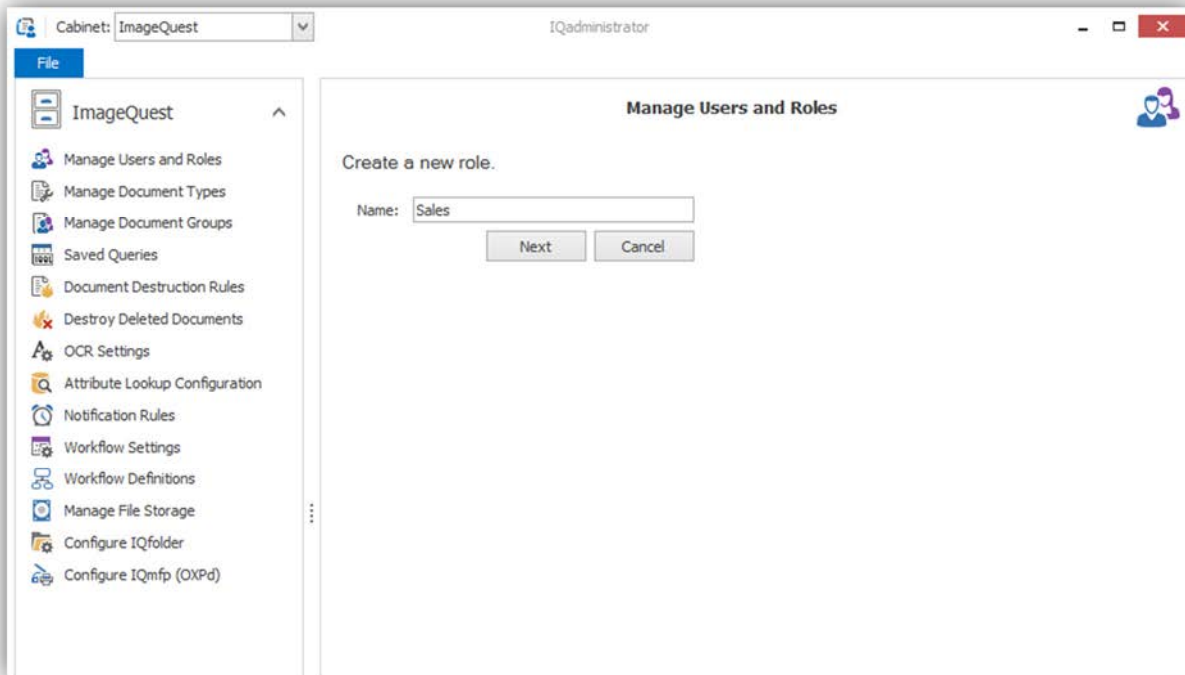
Add Remove Properties

Roles

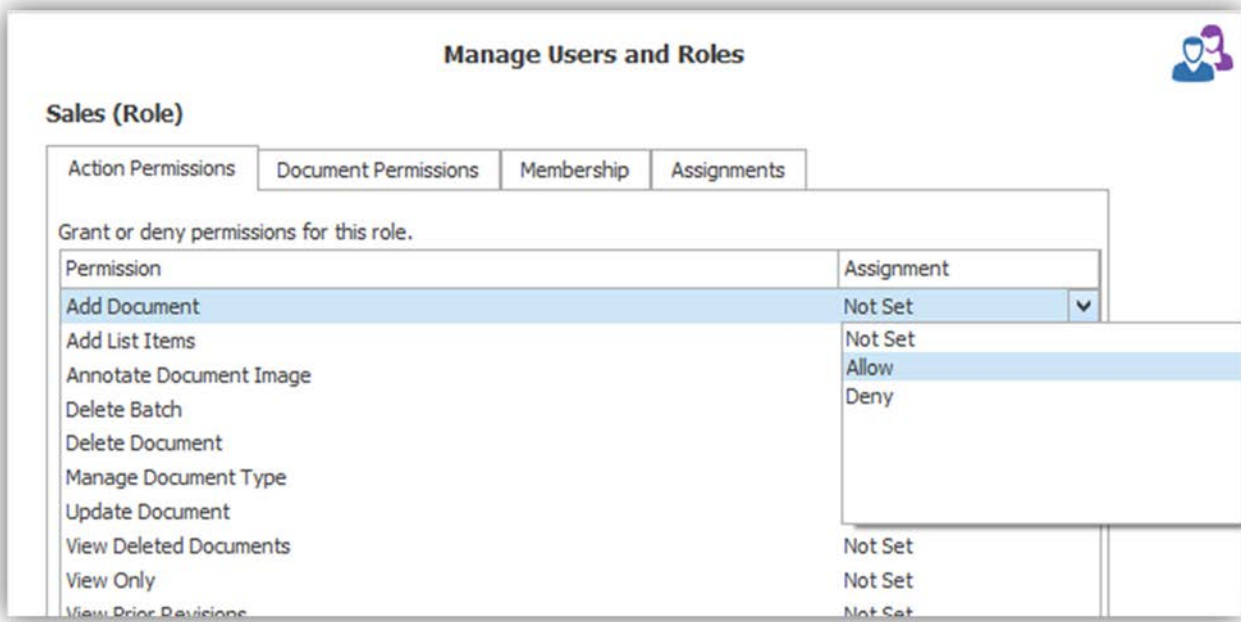
- Name
- AP/AR
- GLProcessor
- Indexer
- Management
- Sales

Add Remove Properties

For example, to create a role for the Sales Department, enter “Sales” in the “Create a new role” screen as illustrated below and click “Next”.



Set action and document type permissions for the “Sales” role as shown below and on the following page; click “Done” when finished.



Manage Users and Roles

Sales (Role)

Action Permissions Document Permissions Membership Assignments

Grant or deny access to document types for the role.

Document Type	Assignment
Check	Not Set
Client Directory	Not Set
Invoice	Not Set
MFP Scan	Not Set

Click the “Membership” tab to assign or remove user membership for the indicated role as displayed below. Notice that “Administrator,” “jsmith” and “tjones” are all assigned to the Sales role membership.

Manage Users and Roles

Sales (Role)

Action Permissions Document Permissions **Membership** Assignments

Assign or remove user membership for the role.

<input checked="" type="checkbox"/> Administrator
<input type="checkbox"/> dogden
<input checked="" type="checkbox"/> jsmith
<input checked="" type="checkbox"/> tjones

Membership in one or more roles can change the effective permissions for a user; for example, see the bottom portion of the “Action Permissions” and the “Document Permissions” tabs on the following page representing the user’s effective action and document type permissions for “tjones”.

Manage Users and Roles

Tom Jones/tjones (User)

Action Permissions Document Permissions Membership Assignments

Grant or deny permissions for this user.

Permission	Assignment
Add Document	Allow
Add List Items	Allow
Annotate Document Image	Allow
Delete Batch	Deny
Delete Document	Deny
Manage Document Type	Not Set
Update Document	Not Set
View Deleted Documents	Not Set
View Only	Not Set
View Prior Revisions	Not Set

Membership in one or more roles can change the effective permissions for a user. The list below represents users' effective action permissions.

Permission	Assignment
Add Document	Allow
Add List Items	Allow
Annotate Document Image	Allow
Delete Batch	Deny
Delete Document	Deny
Manage Document Type	Not Set
Update Document	Not Set
View Deleted Documents	Not Set
View Only	Not Set
View Prior Revisions	Not Set

Manage Users and Roles

Tom Jones/tjones (User)

Action Permissions Document Permissions Membership Assignments

Grant or deny access to document types for the user.

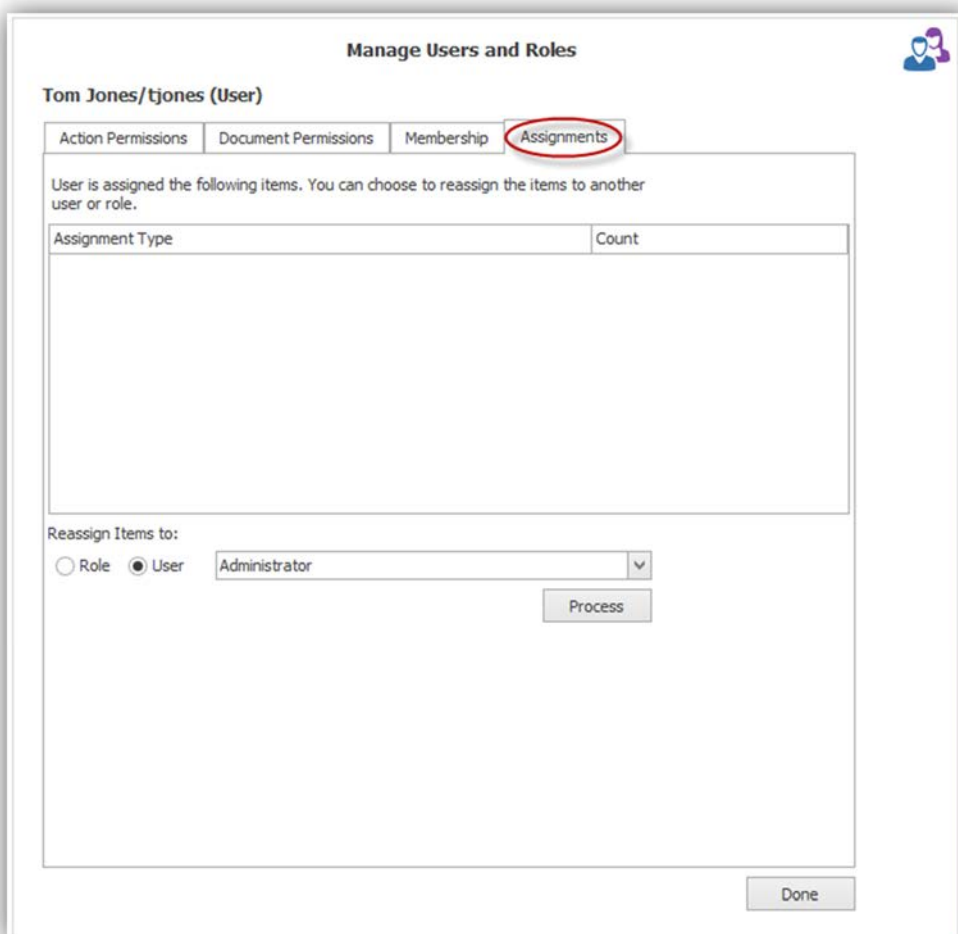
Document Type	Assignment
Check	Not Set
Client Directory	Not Set
Invoice	Not Set
MFP Scan	Not Set

Membership in one or more roles can change the effective permissions for a user. The list below represents users' effective document type permissions.

Document Type	Assignment
Check	Allow
Client Directory	Allow
Invoice	Allow
MFP Scan	Not Set

Assignments

User and Role properties have a tab called “Assignments” allowing the ImageQuest Administrator to see and reassign different assignment types to another user or role. This must be done before deleting a user or role with existing assignment types.



The screenshot shows the 'Manage Users and Roles' window. At the top, there's a title bar with a user icon. Below it, the window title is 'Manage Users and Roles'. The main content area is for 'Tom Jones/tjones (User)'. There are four tabs: 'Action Permissions', 'Document Permissions', 'Membership', and 'Assignments' (which is selected and circled in red). Below the tabs, a message states: 'User is assigned the following items. You can choose to reassign the items to another user or role.' Below this message is a table with two columns: 'Assignment Type' and 'Count'. The table is currently empty. Below the table, there's a section titled 'Reassign Items to:' with two radio buttons: 'Role' and 'User' (which is selected). To the right of the radio buttons is a dropdown menu showing 'Administrator'. Below the dropdown is a 'Process' button. At the bottom right of the window is a 'Done' button.

The following assignments can be changed from this tab:

- Routing
- Workflow Task
- Workflow Definition
- IQ folder
- Indexer
- MFP Device
- Notification
- Notification Rules

Removing Users or Roles

Users and roles can be removed from the Cabinet in **Manage Users and Roles** by clicking the “Remove” button as illustrated below.

Manage Users and Roles

Use the lists below to grant or deny permissions to users and roles, and to change other settings.

Cabinet Users

Username	First Name	Last Name	Allow SSO	Roles
Administrator	Admin	User	<input type="checkbox"/>	Sales
dogden	David	Ogden	<input checked="" type="checkbox"/>	Sales
jsmith	John	Smith	<input checked="" type="checkbox"/>	Sales
tjones	Tom	Jones	<input checked="" type="checkbox"/>	Sales

Add Remove Properties

Roles

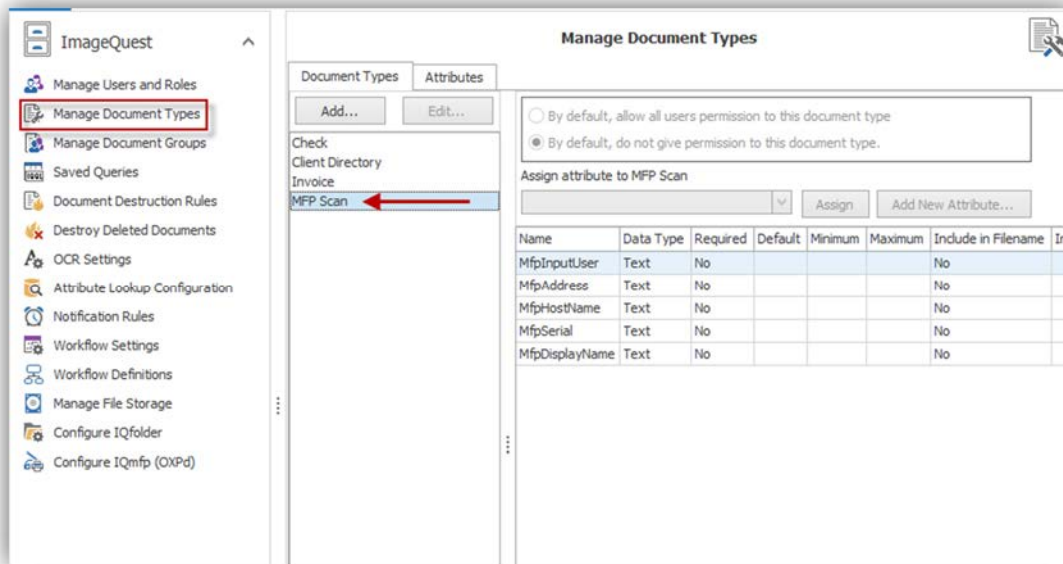
Name
AP/AR
GLProcessor
Indexer
Management
Sales

Add Remove Properties

Note: If a user is removed from the cabinet, the user is NOT deleted from the Warehouse. If a role is removed from the cabinet, the user members who were assigned to that role are NOT removed from the cabinet.

Manage Document Types

Now that you have established users and roles and have set permissions and assignments, you are ready to manage document types in ImageQuest. Click **Manage Document Types** in the cabinet as displayed below. This window contains the “Document Types” and “Attributes” tabs; the window defaults to the “Document Types” tab each time it is opened.



Note: The MFP Scan document type and attributes—MfpInputUser, MfpAddress, MfpDisplayName, MfpHostName and MfpSerial—are created by default and can neither be deleted nor edited.

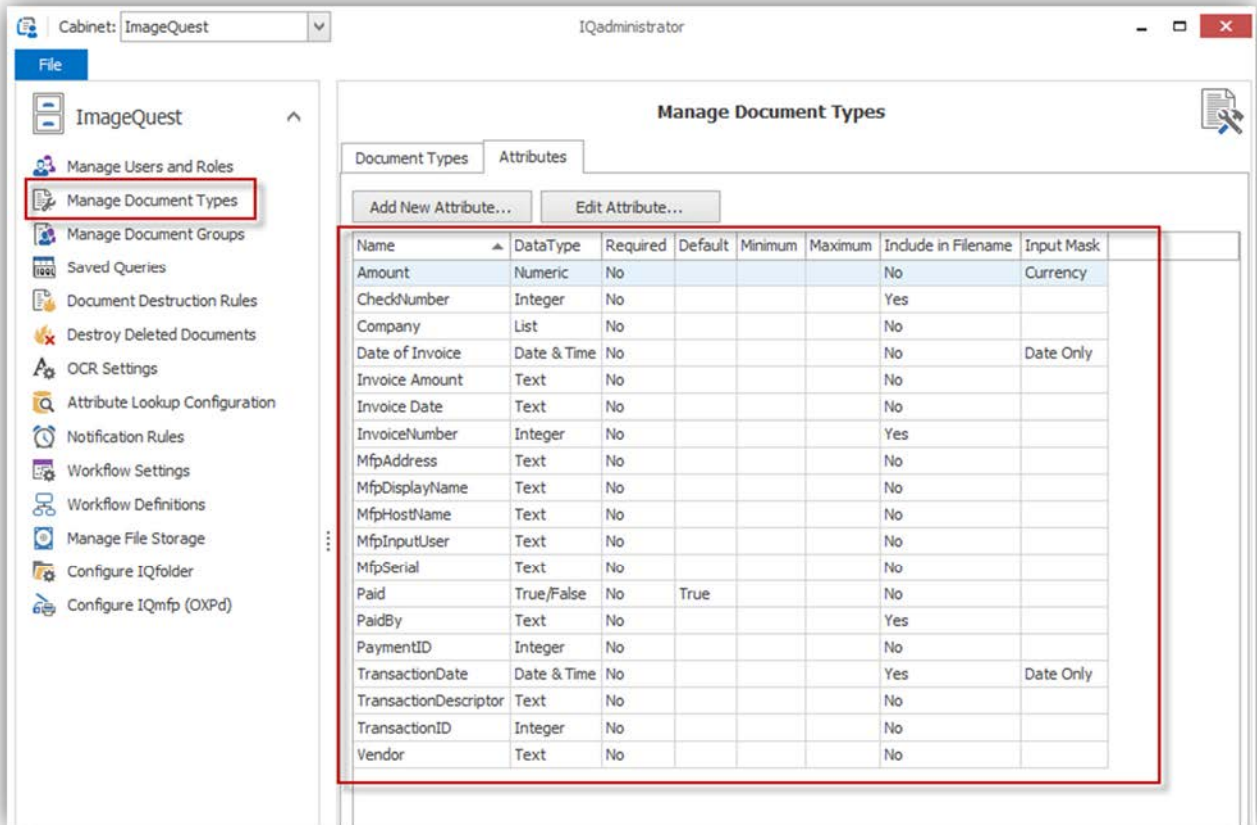
Document Type Overview

Document types that will be utilized by your company have to be created in ImageQuest; there should be a “Document Type” created for every document that your company uses frequently, or is currently filed on a regular basis. It may be helpful to record a list of all the documents your office currently uses, who is permitted to use the document and how and from which departments the documents are originated. For instance, if your company wants to store HR type documents in IQ, you may create document types such as “W-4”, “I-9” or “Performance Evaluation”.

Attribute Overview

Attributes are index fields that allow users to search for filed documents. There are no restrictions on how many or few attributes can be added per document type. Adding too many attributes may slow down the indexing process considerably while adding too few could make the documents harder to find.

In the example below, the **Manage Document Types** window displays the “Attributes” tab. The default MFP Scan attributes are listed—MfpAddress, MfpDisplayName, MfpHostName, MfpInputUser and MfpSerial; new attributes may be added and edited using the “Add New Attribute” and “Edit Attribute” buttons.



Note: Attributes may be created, edited and deleted from the “Attributes” tab.

Creating a New Document Type

Once you have compiled your office's list of documents, create a new Document Type for each.

In **Manage Document Types**, click the "Document Types" tab to add a Document Type as illustrated below. Click "Add" to show the "Add New Document Type" dialog box.

Manage Document Types

Document Types | Attributes

Add... | Edit...

Check
Client Directory
Invoice
MFP Scan

☐ By default, allow all users permission to this document type
☒ By default, do not give permission to this document type.

Assign attribute to MFP Scan

| Assign | Add New Attribute...

Name	Data Type	Required	Default	Minimum	Maximum	Include in Filename	In
MfpInputUser	Text	No				No	
MfpAddress	Text	No				No	
MfpHostName	Text	No				No	
MfpSerial	Text	No				No	
MfpDisplayName	Text	No				No	

Enter the name of the document as demonstrated on the following page. Below the name field, the Administrator may either click the checkbox "By default, allow all users permission to this document type" only if it is desired for all users to have access to the Document Type or click "By Default, do not give permission to this type of document type." if the Administrator prefers to manage the permissions at the User or Role level.

"Allow these documents to be processed by FullText OCR" is checked by default, but can be unchecked if the specific document type should not be processed for Fulltext extraction or OCR conversion. Click "OK" to save the new Document Type.

Add New Document Type

Name:

☒ By default, allow all users permission to this document type.
☐ By default, do not give permission to this document type.

☒ Allow these documents to be processed by FullText OCR.

The list below shows popular attributes that appear on many of your current Document Types. Use the Show All Attributes option to include all available attributes in the list. Check the attributes you would like to assign to this new Document Type.

☐ Show All Attributes

☐ Amount

The screenshot below shows that the new document type, “Purchase Order,” has been created and is added to the “Document Types” tab in alphabetical order.

Manage Document Types

Document Types | Attributes

Check
 Client Directory
 Invoice
 MFP Scan
Purchase Order

☒ By default, allow all users permission to this document type
☐ By default, do not give permission to this document type.

Assign attribute to Purchase Order

Name	Data Type	Required	Default	Minimum	Maximum	Include in Filename	In

Creating and Assigning New Attributes

Once a document type is created, it will need to be assigned “Attributes” (index fields). Click “Add New Attribute” as highlighted below.

The screenshot shows the 'Manage Document Types' window. The 'Attributes' tab is active. On the left, a list of document types includes 'Purchase Order', which is highlighted. In the main pane, there are radio buttons for permissions, a dropdown for 'Assign attribute to Purchase Order', and an 'Add New Attribute...' button highlighted with a red box. Below this is a table with columns: Name, Data Type, Required, Default, Minimum, Maximum, Include in Filename, and an icon column.

The screenshot below shows the “Add New Attribute” window and the options for attribute configuration. See the table on the following page for a description of each section.

The 'Add New Attribute' window is shown. It has several sections:

- Attribute Name:** A text input field.
- Data Type:** Radio buttons for Text (selected), Numeric, List, Integer, Date & Time, and True/False.
- Description:** Text explaining that attributes can store letters, numbers, and punctuation, with examples like '003-RBC0908'.
- Options:**
 - Minimum Length, Maximum Length, and Default: Text input fields.
 - Input Mask: A dropdown menu.
 - Required and Include in filename: Checkboxes.
- Test Area:** A text input field for testing and a 'Test' button.

 At the bottom are 'OK' and 'Cancel' buttons.

Section	Description
Attribute Name	The name of the attribute
Data Type	The type of input associated with the attribute
Description	A brief explanation of a data type with specific examples
Options	<div>Minimum (length or value)</div> <div>Minimum number of characters or minimum value allowed</div> <div>Maximum (length or value)</div> <div>Maximum number of characters or maximum value allowed</div> <div>Default</div> <div>A pre-fill value for indexing</div> <div>Required</div> <div>Attribute value must be populated when indexing</div> <div>Include in filename</div> <div>Includes the attribute value as part of the file name when using the "Save Local Copy" and "Email Document" features of IQdesktop</div> <div>Input Mask</div> <div>Provides restricted data input</div>
Test Area	Allows testing of data input for a data type

There are six data types that can be assigned to attributes. The attribute data type selected will control the type of information entered into a field of that type. Reference each attribute data type and description in the table on the following page before you assign the data type to each new attribute you create. Once a new attribute is saved, the data type for it cannot be changed.

Attribute Data Type	Description
Text	Any keyboard character may be entered such as letters, numbers, punctuation, alpha-numeric account numbers and/or any numbers that begin with leading zeros (i.e. 003-RBC0908; 123-456-7890; (407) 555-1212; 007).
Numeric	Stores fractional values for currency amounts or percentages. Numeric values can have up to 29 total digits with at most 8 digits to the right of the decimal place (i.e. 3.50; 3.14159).
List	Creates a drop-down list of choices that you define (i.e. a list of customers, a list of cities, a list of companies, etc.). Users may add "List-based" attribute items on the fly if they have the "Allow" Add List Item permission. <i>Note: A list-based attribute is preferred whenever possible in order to minimize indexing errors.</i>
Integer	Requires whole numbers with no punctuation, no decimal, and with no leading zeroes. Integer values have an absolute maximum of 2147483647 and an absolute minimum of -2147483648 (i.e. 1138; 2112).
Date & Time	Stores dates and can default to the current date. Date & Time attributes have a maximum of 12/31/9999 11:59:59 PM and an absolute minimum of 1/1/1753 12:00:00 AM (i.e. 1/1/1970; 6/10/2008).
True/False	Attributes can be true, false or non-existent (null), typically displayed in the form of a three state checkbox, either checked, unchecked or grayed out for true, false or non-existent respectively.

In the example below, an attribute called “Patients Name” is assigned to the document type, “Invoice”. This attribute is categorized as a “Text” data type; its description is displayed to the right for review. Jane Doe is tested for accuracy in the test area field; the test results show that this data input **Passed** for this Data type. Click “OK” to save and assign the new attribute to the selected Document Type and add the new attribute in the “Attributes” tab. See the following page. Once an attribute is added, it can then be assigned to other Document Types as needed.

Add New Attribute

Attribute Name: Patients 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: Input Mask: ▼

Maximum Length: 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.

Default:

☐ Required ☐ Include in filename

Test Area

Test some input for storage in this Data Type:

Passed

Note: “Text” fields are the most flexible data types. Even if the value of the attribute is a number such as a Social Security number, the “Text” data type may be the best choice because it allows dashes, leading zeros and specific lengths.

Manage Document Types

Document Types Attributes

Add... Edit...

- Check
- Client Directory
- Invoice
- MFP Scan
- Purchase Order

☒ By default, allow all users permission to this document type
☐ By default, do not give permission to this document type.

Assign attribute to Invoice

▼
Assign
Add New Attribute...

Name	Data Type	Required	Default	Minimum	Maximum	Include in Filename	Input
Patients Name	Text	No				No	
Payer Name	Text	No				No	
Phone Number	Text	No				No	

Note: The “Add New Attribute” button in the “Attributes” tab only creates the attribute and does NOT assign it to any particular document type.

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 is set to 'Phone Number'. Under 'Data Type', 'Text' is selected. The 'Description' field contains text about storing combinations of letters, numbers, and punctuation, with examples: 003-RBC0908, 123-456-7890, (407) 555-1212, and 007. In the 'Options' section, 'Minimum Length', 'Maximum Length', and 'Default' are empty text boxes. The 'Input Mask' dropdown is open, showing 'US Phone Number' and 'Social Security Number' as options. Below the dropdown, there is a note: 'Select a built-in format and use the display format and validation rules. See Admin Guide for further details.' There are also checkboxes for 'Required' and 'Include in filename'. At the bottom, there is a 'Test Area' with a text input field and a 'Test' button. The 'OK' and 'Cancel' buttons are 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.

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 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.

The screenshot shows the 'Add New Attribute' dialog box. The 'Attribute Name' field is set to 'Invoice Number'. Under 'Data Type', 'Text' is selected. The 'Description' field contains text about storing combinations of letters, numbers, and punctuation, with examples: 003-RBC0908, 123-456-7890, (407) 555-1212, and 007. In the 'Options' section, 'Minimum Length' and 'Maximum Length' are empty, 'Default' is empty, and 'Input Mask' is set to 'INV-00000'. There are checkboxes for 'Required' and 'Include in filename', both of which are unchecked. The 'Test Area' section shows the input 'INV-12345' and a 'Test' button. Below the input, the word 'Passed' is displayed in green. At the bottom right are 'OK' and 'Cancel' buttons.

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 data-bbox="1138 338 1435 380" style="border: 1px solid black; padding: 2px;">\$1,024.50</div> <p>(EditMask = "c"; EditValue = 1024.5)</p> <div data-bbox="1138 495 1435 537" style="border: 1px solid black; padding: 2px;">\$20,010</div> <p>(EditMask = "c0"; EditValue = 20010)</p>
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 data-bbox="1138 743 1435 785" style="border: 1px solid black; padding: 2px;">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 data-bbox="1138 1169 1435 1211" style="border: 1px solid black; padding: 2px;">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 data-bbox="1138 1453 1435 1495" style="border: 1px solid black; padding: 2px;">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>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>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	<p>The ';' character is used to separate the masks for positive and negative values.</p> <p>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.</p> <p>If the ";" character is followed by an empty string, the editor will not allow end-users to enter negative values.</p>
\$	Currency character	<p>Defines the position of the currency symbol determined by the current culture.</p>
Any other character	Literal character	<p>Any other characters that appear in the mask are inserted into the edit box literally.</p> <p>To display special characters in the edit box literally, they should be preceded with the escape character ('\').</p>

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.

List Attribute

The “List” attribute data type screen is a bit different from the other data types. In the screenshot below, the “List” data type has been selected for the new attribute name, “Status”.

Add New 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 can 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.

Once this data type is selected, the “Options” section changes as illustrated below. List-based attributes allow you to select an item from a list of choices you define such as the example displayed. By default each list item is enabled. Deselecting this checkbox will remove that item from the list shown during indexing but will leave it available for searching previously indexed documents.

Options

Name	Enabled
	<input checked="" type="checkbox"/>
Pending	<input checked="" type="checkbox"/>
Complete	<input checked="" type="checkbox"/>
Incomplete	<input checked="" type="checkbox"/>

Default Value: ▼ ↺

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

Test Area

Test some input for storage in this Data Type:

Note: The test area does NOT apply to the “List” and “True/False” data types.

Category\Subcategory List Attribute Type

The List attribute includes an option 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.

Add New 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 can 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\Maitland	<input checked="" type="checkbox"/>
Florida\Orlando	<input checked="" type="checkbox"/>
Florida\Winter Springs	<input checked="" type="checkbox"/>

Default Value:

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

In the example below, Category shows the entry to the left of the '\ ' and the Subcategory shows what is to the right of the '\ '. If this option is checked and entries are populated in the list options, users will be able to choose from a list of categories and subcategories like states\cities (i.e. Florida\Orlando).

Location

Category:

Subcategory:

Subcategory
 Maitland
 Orlando
 Winter Springs

Location
 Florida\Orlando

Sharing Existing Attributes

It may be beneficial for users to assign multiple attributes to each Document Type; this equips users to search for documents in ImageQuest more efficiently. In the following example, we are creating a new document type called "Health History". The Administrator may check the box, "Show All Attributes," to determine if any existing attributes apply to the new document type. The screenshot below shows the existing attribute "Patient Name" is checked, assigning it to the "Health History" document type.

Add New Document Type

Name:

☒ By default, allow all users permission to this document type.
☐ By default, do not give permission to this document type.

☒ Allow these documents to be processed by FullText OCR.

The list below shows popular attributes that appear on many of your current Document Types. Use the Show All Attributes option to include all available attributes in the list. Check the attributes you would like to assign to this new Document Type.

☒ Show All Attributes

- ☒ A Patient Name
- ☐ Amount
- ☐ CheckNumber
- ☐ Company
- ☐ Date of Invoice
- ☐ Invoice Amount
- ☐ Invoice Date
- ☐ InvoiceNumber
- ☐ Location

Note: When creating a new document type, any existing attribute that is associated with at least 80% of existing document types will automatically be selected for assignment to the new document type. Choose "Show All Attributes" to view all of the existing attributes defined in the system, and use the check boxes next to each attribute to select if that attribute is assigned to the document type.

Existing attributes can also be assigned from the document types tab by highlighting a document type, clicking the drop down arrow, highlighting an attribute and clicking the “Assign” button as illustrated below.

By default, allow all users permission to this document type
 By default, do not give permission to this document type.

Assign attribute to Medical Record

Amount
 CheckNumber
 Company
 Date of Invoice
 Invoice Amount
 Invoice Date
 InvoiceNumber

Assign Add New Attribute...

Minimum	Maximum	Include in Filename
		No
		No
		No
		No

Editing, Removing and Reordering Attributes

There may come a time when attributes have to be renamed or removed from certain document types.

In the Document Type, “Health History,” you will see the list of attributes to its right as illustrated below. The attribute, “Patient Name,” for example, needs to be renamed; the “Edit” attribute feature allows you to modify certain attribute options. To edit the attribute, double-click it or highlight the attribute name, right-click on it and select “Edit” from the menu.

Manage Document Types

Document Types Attributes

Add... Edit...

Check
 Client Directory
 Health History
 Invoice
 Medical Record
 MFP Scan
 Purchase Order

By default, allow all users permission to this document type
 By default, do not give permission to this document type.

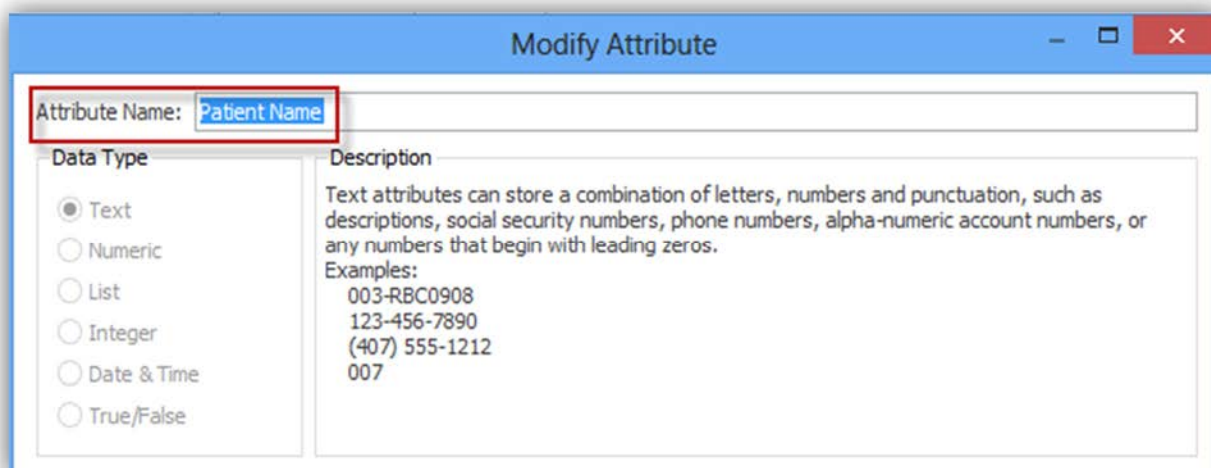
Assign attribute to Health History

Assign Add New Attribute...

Name	Data Type	Required	Default	Minimum	Maximum	Include in File
Patient Name	Text	No				No
Patient's Health						No

Edit Ctrl+E
 Remove Ctrl+Alt+R
 Move Down Ctrl+D

In the screenshot below, the original attribute name, "Patient Name," is displayed.



The screenshot shows a window titled "Modify Attribute". At the top, there is a text field labeled "Attribute Name:" containing the text "Patient Name". Below this, on the left, is a "Data Type" section with radio buttons for "Text", "Numeric", "List", "Integer", "Date & Time", and "True/False". The "Text" option is selected. On the right, there is a "Description" section with the following text: "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." Below the description are "Examples:" listed as "003-RBC0908", "123-456-7890", "(407) 555-1212", and "007".

To rename this attribute, highlight the original name and type in the new name, "Patient Profile," as shown below; click "OK".



The screenshot shows the same "Modify Attribute" window. The "Attribute Name:" field now contains the text "Patient Profile". The "Data Type" section remains the same with "Text" selected. The "Description" section is also the same, showing the same text and examples as the previous screenshot.

Note: The option fields can be modified, but the data type cannot be modified.

Now you will see the update in the attribute list for the Document Type “Health History” in the document types tab as shown on the following page.

The screenshot shows the 'Manage Document Types' window with the 'Attributes' tab selected. On the left, a list of document types includes 'Health History', which is highlighted. The main area shows two radio buttons for default permissions, with the first one selected. Below this is a section to 'Assign attribute to Health History' with a dropdown menu and 'Assign' and 'Add New Attribute...' buttons. A table lists attributes assigned to 'Health History':

Name	Data Type	Required	Default	Minimum	Maximum	Include in
Patient Profile	Text	No				No
Patient's Health Insurance	Text	No				No

A red arrow points to the 'Patient Profile' row in the table.

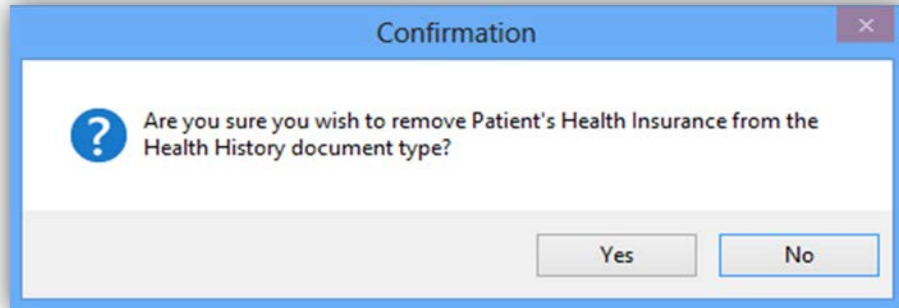
Attributes can be unassigned or removed from Document Types. For example, attribute “Patient Health Insurance Provider” is no longer needed for Document Type “Health History”. Select the Document Type, right-click the attribute and select “Remove” from the menu. See below.

This screenshot shows the same 'Manage Document Types' window, but with a context menu open over the 'Patient's Health Insurance' attribute row. The menu options are:

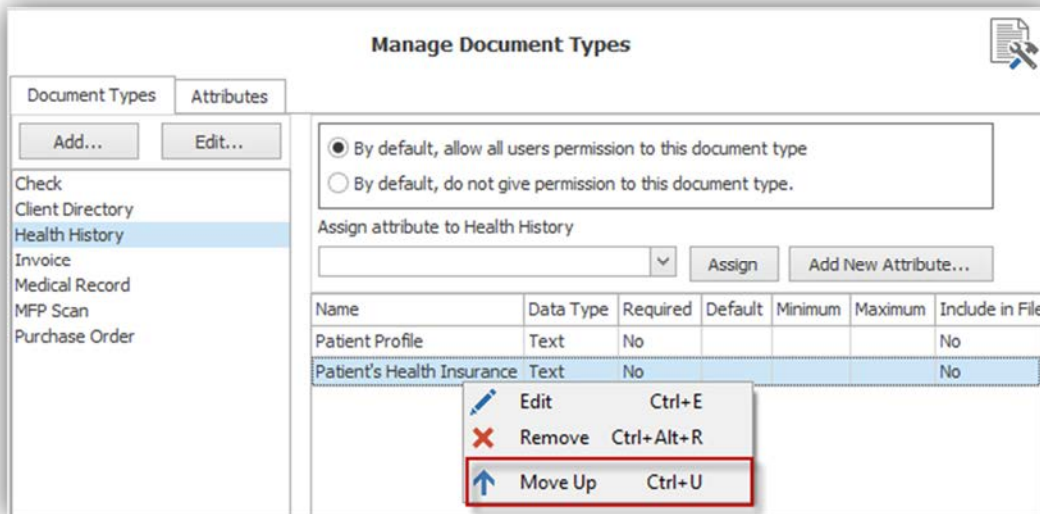
- Edit (Ctrl+E)
- Remove (Ctrl+Alt+R)
- Move Up (Ctrl+U)

The 'Remove' option is highlighted by the mouse cursor.

The dialogue box, "Confirmation," below appears to ensure the Administrator wants to remove the selected attribute. If so, click "Yes". The Document Type, "Health History," will now have only one attribute: "Patient Profile", for indexing.

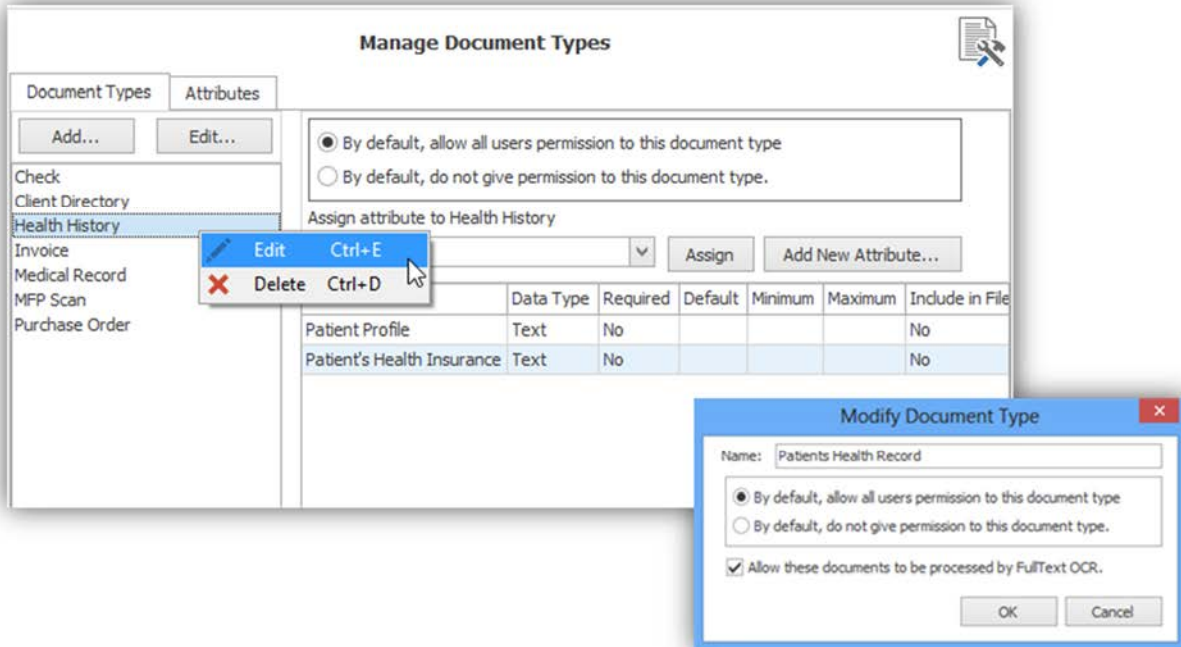


Attributes can also be reordered for indexing purposes on the document type level. By default, the attributes are displayed in the order in which they were assigned to the document type. It may make more sense to have the attributes in a specific order, for example Street, City, State, and Zip. If there is a need to reorder attributes, right-click an attribute and select "Move Up" or "Move Down" from the menu. See below for an example.

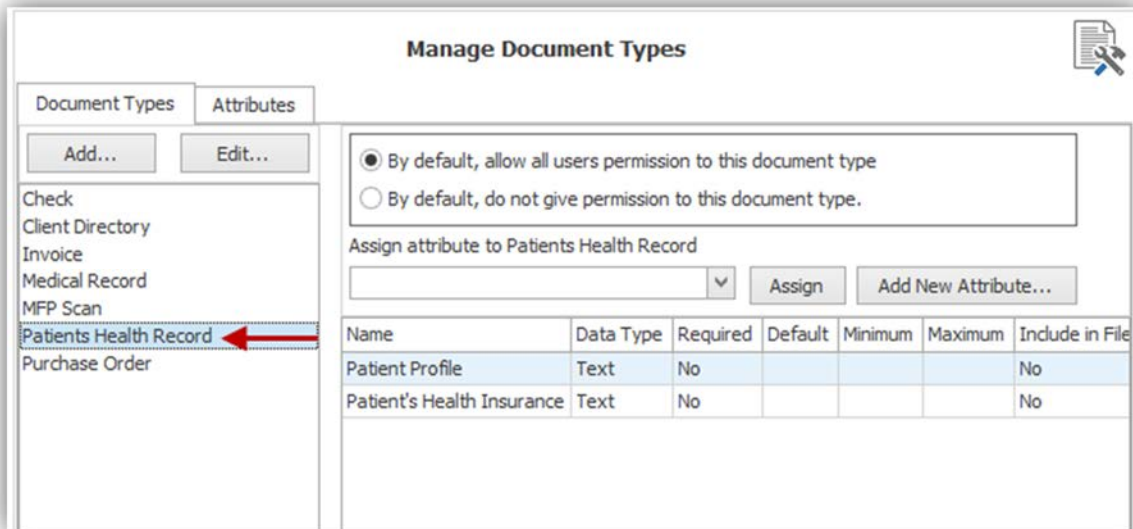


Editing and Removing Document Types

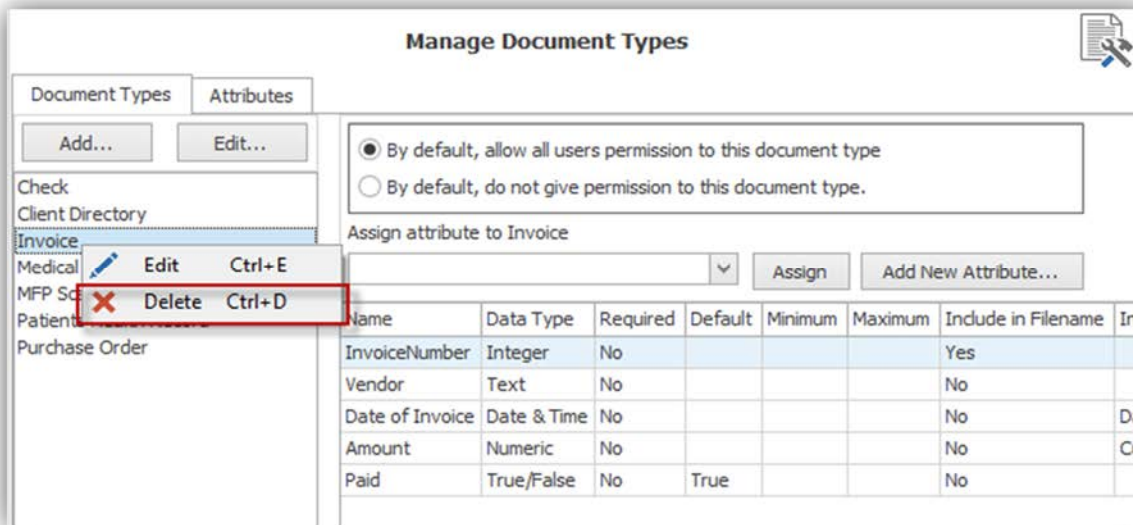
To edit a Document Type, right-click the Document Type and select “Edit” in the menu as shown below. The “Modify Document Type” window will appear with the Document Type name highlighted. For example, the Document Type “Health History” is being modified here. Type in the new title, “Patient Health Record”, and optionally decide whether to allow all users to access this Document Type by default or to be processed by FullText OCR and click “OK”.



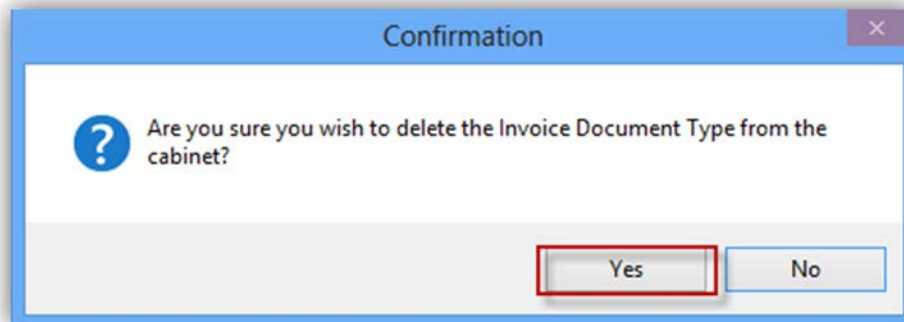
Once you click “OK”, you will see that “Health History” has been renamed to “Patient Health Record” as highlighted on the following page.



To delete a Document Type, locate it in the “Document Types” tab, right-click on it and select “Delete” in the menu as shown below. The Document Type, “Invoice”, is being deleted.



The dialogue box, "Confirmation" appears to ensure that the Administrator desires to delete the selected Document Type, "Invoice" as noted below. Click "Yes".

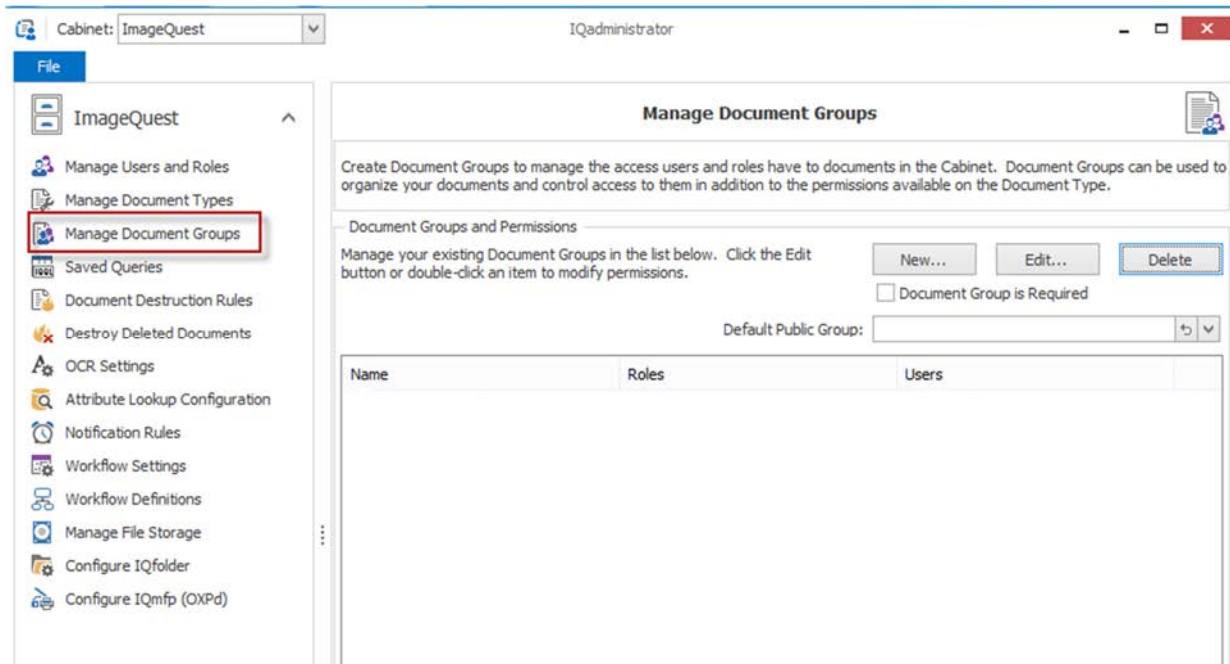


Note: If a Document Type or Attribute is in use by one or more existing documents, they cannot be deleted. This also includes documents that have been flagged as deleted.

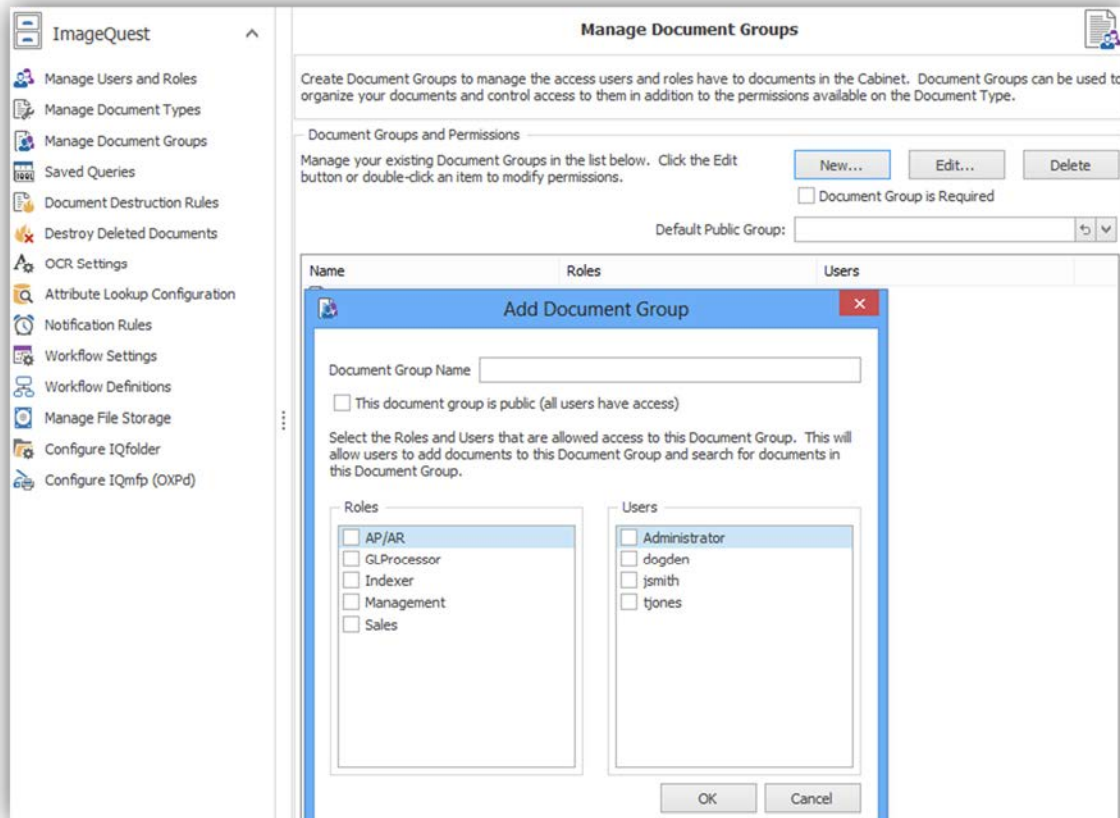
Manage Document Groups

Document Groups allow the Administrator to organize documents and further restrict access to Users or Roles in addition to the permissions set at the Document Type level. Once a Document Group is created and Users or Roles are added, only Users or Roles in that group can assign documents to the group or search and view documents assigned to the group.

Click **Manage Document Groups** as displayed below to Add, Edit or Delete Document Groups.



To create a new Document Group, click “New” to open the “Add Document Group” window as shown below. The window contains the “Document Group Name” field and two lists, one for all current ImageQuest “Roles” and one for all current ImageQuest “Users”.



For example, a company receives invoices from three cities: Atlanta, Orlando and Phoenix. Each of these cities has a Sales Manager assigned to it. Only the Sales Manager and the company's CFO are allowed access to the Invoice documents in the Cabinet for each location. The Administrator can create a Document Group for each location and add the assigned Sales Manager and the CFO to the group to accommodate this need.

Note: The list of users in each document group must also include the user assigned to indexing incoming documents. By including this user in each group, the indexer is able to assign incoming documents to their respective group.

In the screenshot below, "ORL" is entered in the "Document Group Name" field. The Sales Manager "Bjones", the CFO "dogden" and the indexer "tjones" are selected in the "User" list. Note that each user selected receives a check in the box to the left of their name to confirm the selection. Click "OK" to add the new group to the Document Groups and Permissions list. Clicking "Cancel" will close the "Add Document Group" window and the group will not be created.

Add Document Group

Document Group Name:

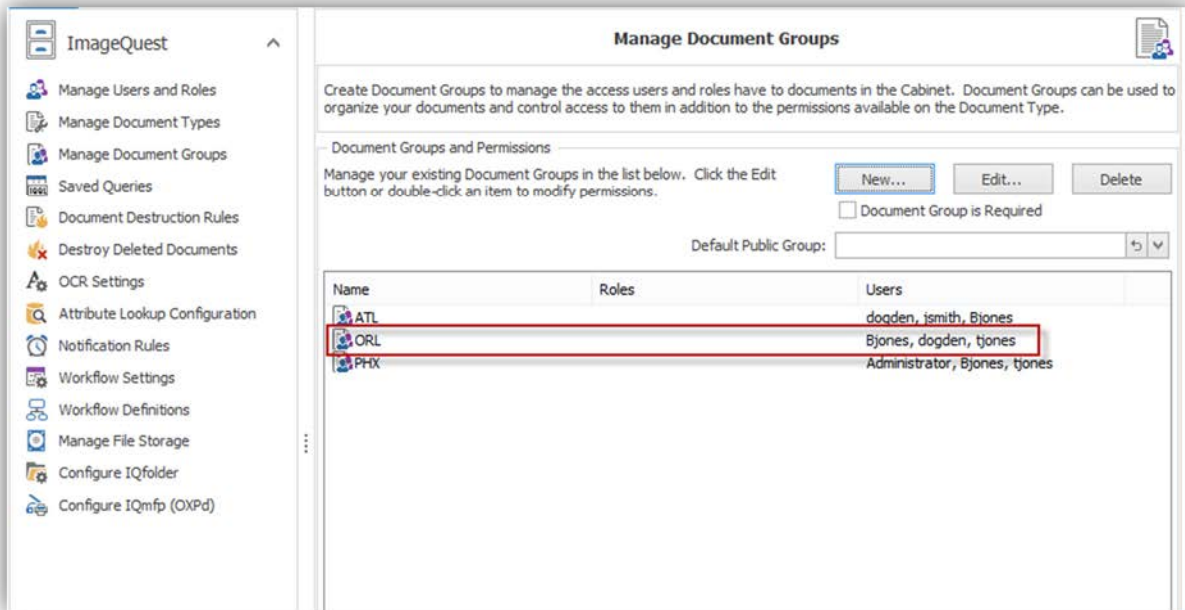
☐ This document group is public (all users have access)

Select the Roles and Users that are allowed access to this Document Group. This will allow users to add documents to this Document Group and search for documents in this Document Group.

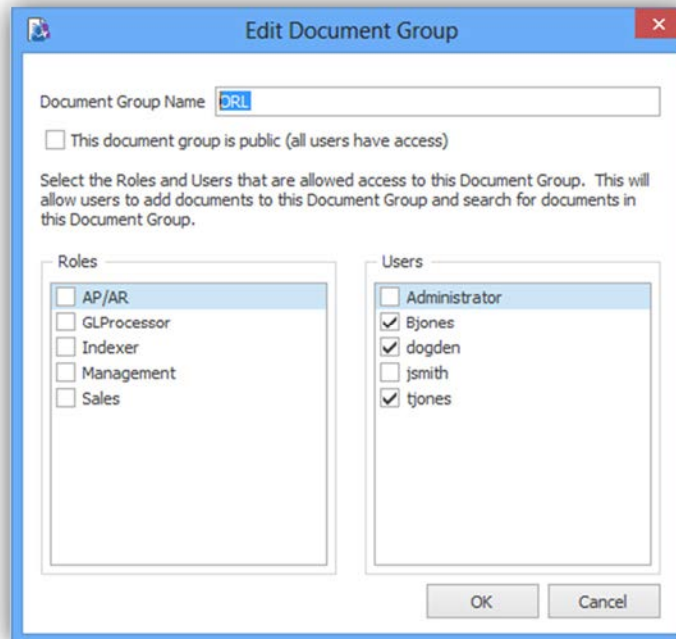
Roles	Users
<input type="checkbox"/> AP/AR	<input type="checkbox"/> Administrator
<input type="checkbox"/> GLProcessor	<input checked="" type="checkbox"/> Bjones
<input type="checkbox"/> Indexer	<input checked="" type="checkbox"/> dogden
<input type="checkbox"/> Management	<input type="checkbox"/> jsmith
<input type="checkbox"/> Sales	<input checked="" type="checkbox"/> tjones

OK Cancel

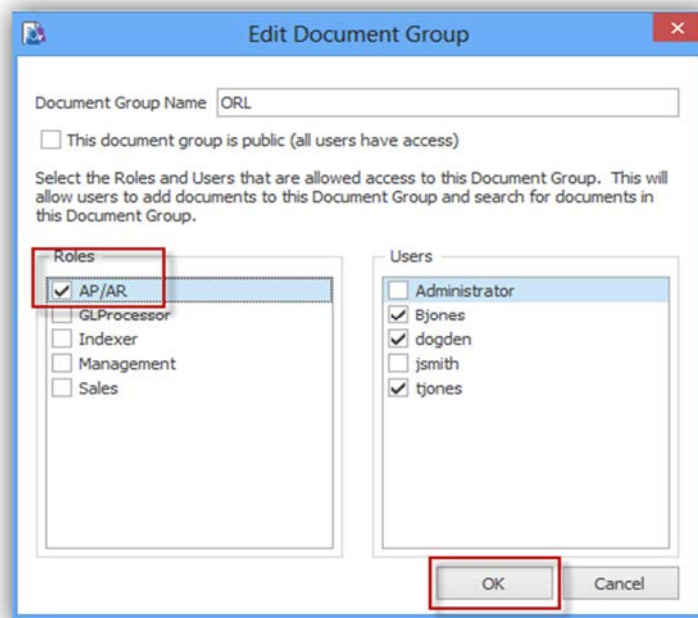
The Document Groups and Permissions list will show each group that has been added and displays the group “Name” and the names of the “Roles” and “Users” that are members of the group as seen on the following page. “ORL” is listed under “Name” and “Bjones”, “dogden”, and “tjones” are listed under “Users”. These are the only Users that are able to assign Invoices to the “ORL” group or search for documents assigned to the “ORL” group.



To edit a Document Group, double-click the group “Name” or select the group and click “Edit” to open the “Edit Document Group” window. See below. In this window, you can change the “Document Group Name” or add or remove Roles or Users in the group.



The “AP/AR” Role is added to the group.



Once all edits are made, click “OK” to save the changes and update the Document Groups and Permissions list as shown below. Clicking “Cancel” will close the “Edit Document Group” window and the changes will not be saved.

Manage Document Groups

Create Document Groups to manage the access users and roles have to documents in the Cabinet. Document Groups can be used to organize your documents and control access to them in addition to the permissions available on the Document Type.

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

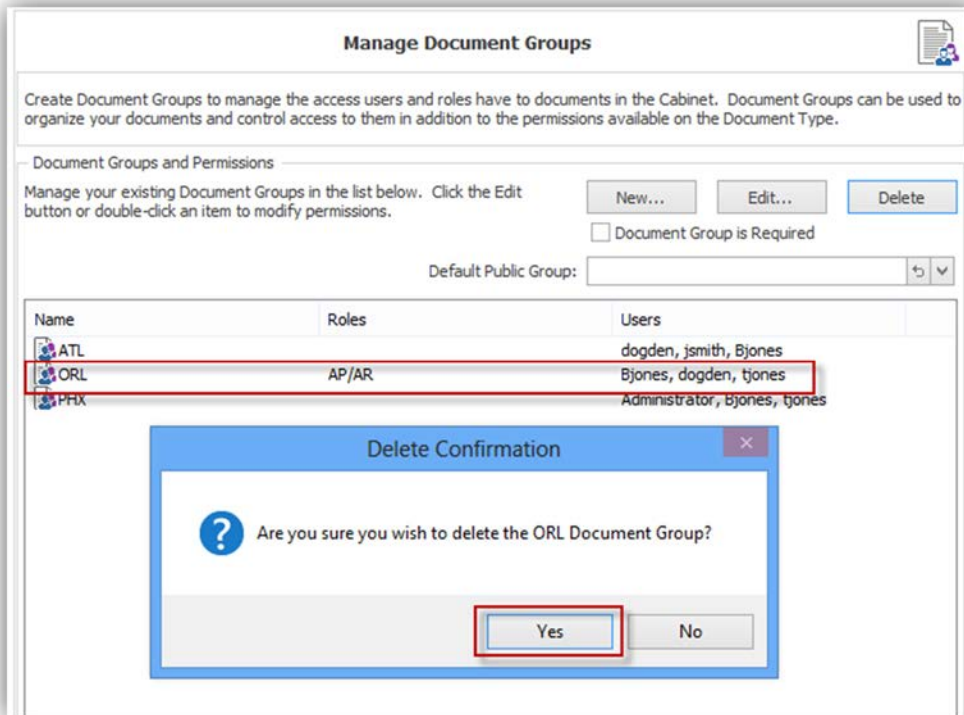
☐ Document Group is Required

Default Public Group:

Name	Roles	Users
ATL		dogden, jsmith, Bjones
ORL	AP/AR	Bjones, dogden, tjones
PHX		Administrator, Bjones, tjones

When a Document Group Name is changed, any documents already assigned to the group will be updated to reflect the new Document Group Name. When Users or Roles are removed from a group, they will no longer have access to any documents that are or were assigned to the group.

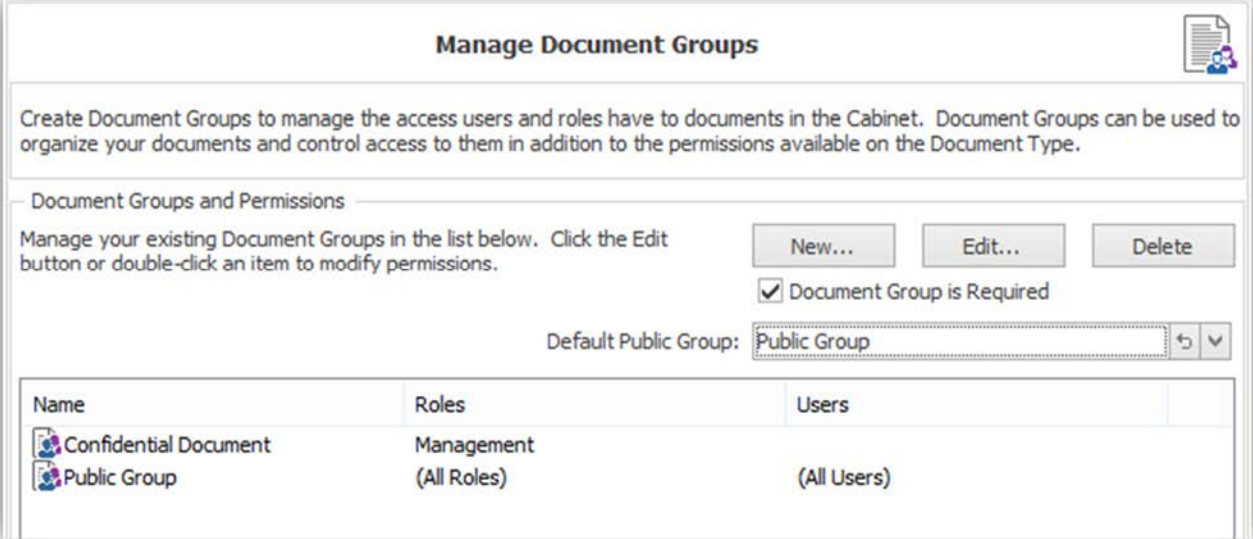
To delete a Document Group, highlight the row in the Document Groups and Permissions list and click “Delete”. A “Delete Confirmation” dialogue box will ask to confirm the deletion. Click “Yes” to delete the Document Group or “No” to retain the Document Group.



A Document Group cannot be deleted if one or more documents are assigned to the group. If the Administrator attempts to delete a group that has documents assigned, an error dialogue box is displayed and it includes the number of documents currently assigned to the group. These documents must be edited to change or remove the group assignment before the Document Group can be deleted.

There is no limit to the number of Document Groups that can be created or Users or Roles that can be added to each group. In addition, the same Users and Roles can be added to multiple Document Groups and there is no limit to the number of groups they can be added to.

Document groups can 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 an option to require a document group be selected when indexing a document.



Manage Document Groups

Create Document Groups to manage the access users and roles have to documents in the Cabinet. Document Groups can be used to organize your documents and control access to them in addition to the permissions available on the Document Type.

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	Management	
Public Group	(All Roles)	(All Users)

Please see the *ImageQuest 12.0 User's Guide* for more information on how to add and search for documents assigned to Document Groups.

Saved Queries

ImageQuest provides a way for the Administrator to define saved searches that users may use frequently. A list of frequent searches with their corresponding attribute index fields gives users a shortcut to locate documents.

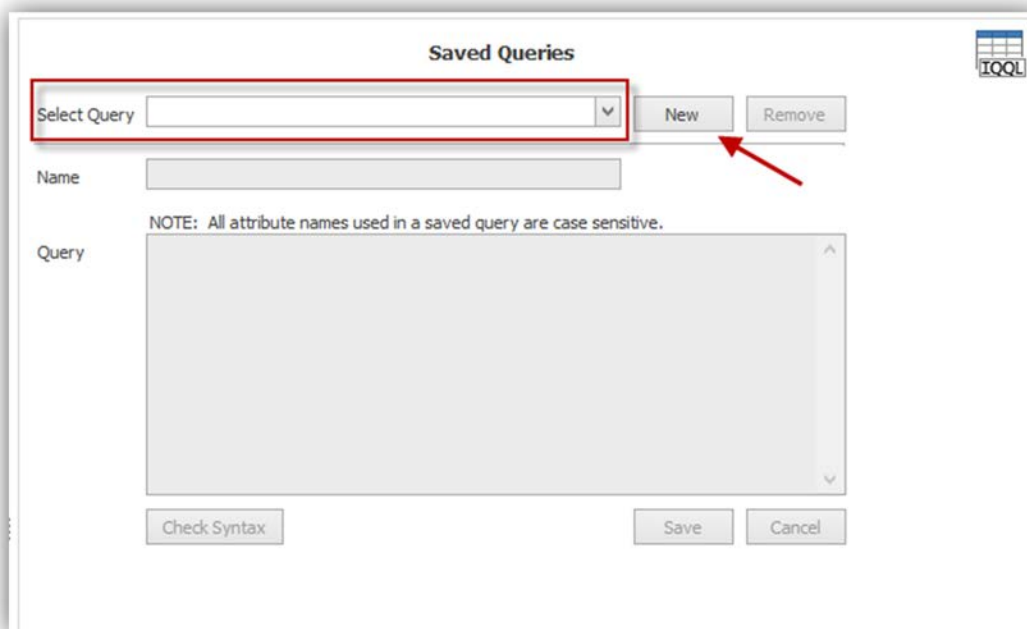
Saved Queries use the Parameterized ImageQuest Query Language (PIQQL), *pronounced Pickle*, developed by Informa Software. The PIQQL syntax used to execute queries is similar in form to Transact-SQL. Specifically, it takes on the same basic structure as the WHERE clause of a Transact-SQL query. However, PIQQL is not designed to be a fully-featured data querying language; its purpose is to mimic the search capabilities provided by the IQ end-user applications. This means that PIQQL does not support certain features of a native database query language. In particular, PIQQL does not support nested queries, Attribute to Attribute comparisons, or embedded expressions. A color coded definition of the PIQQL query syntax is described below.

Symbol	Definition
Query	Criteria "(" Query ")" ("AND" "OR") "(" Criteria ")"
Criteria	Attribute Operator Value Attribute "IN" "(" ValueSet ")"
Attribute	"[" attribute name "]"
Operator	"=" "<" ">" "<=" ">=" "!="
Value	"NULL" NonNullValue ParameterPrompt
ValueSet	NonNullValue ValueSet "," NonNullValue
NonNullValue	"" literal value ""

ParameterPrompt	"{" <i>attribute name</i> ":" prompt text "}"
<i>literal value</i>	The actual value of the <i>Attribute</i> , for example an actual invoice number.
<i>attribute name</i>	The actual name of the <i>Attribute</i> as defined in <i>IQadministrator</i>
prompt text	The text that appears on the client search screen, for example, <i>Enter an invoice number.</i>

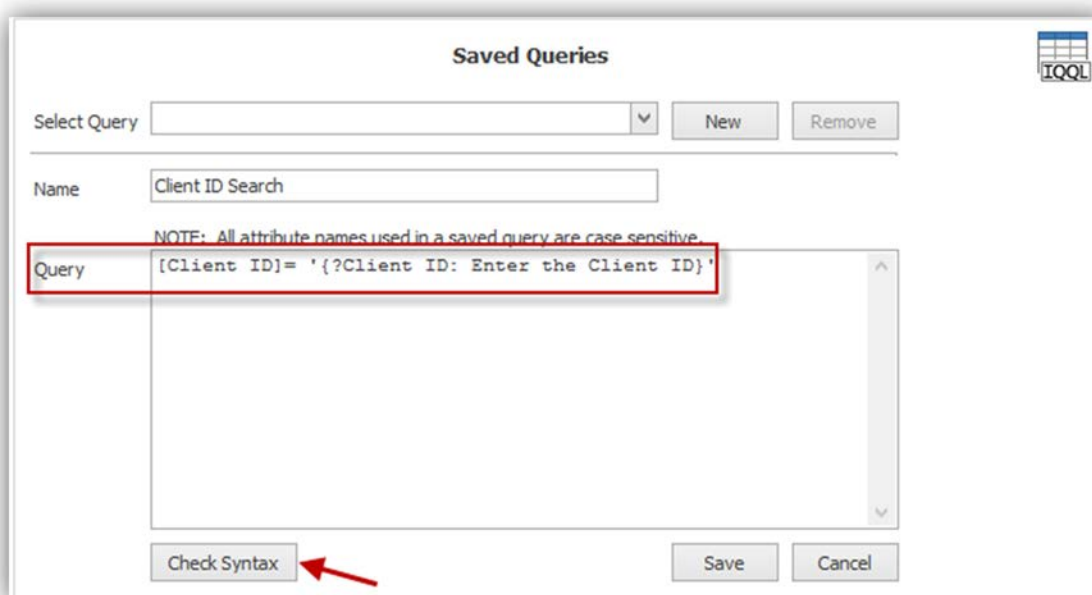
In practice, the PIQQL query is simply a string of comparisons of the form [Attribute] = 'Value', which can be optionally connected by the boolean AND and OR operators. Parenthesis are optional, but can be used around any part of an PIQQL query that would itself be a valid standalone query, in order to enforce proper grouping of the boolean operations. Literal values that are numeric constants do not require the enclosing quotation marks, but they are always valid. (For non-text Attributes, you must ensure that the literal value can be converted to the proper type, or the query parser will generate an exception.) The one exception to this rule occurs with sets of numeric values within a ValueSet; the PIQQL parser currently rejects a ValueSet for an IN statement if the Values are not contained within quotations.

Next to the "Select Query" field, click "New" to create a new query.



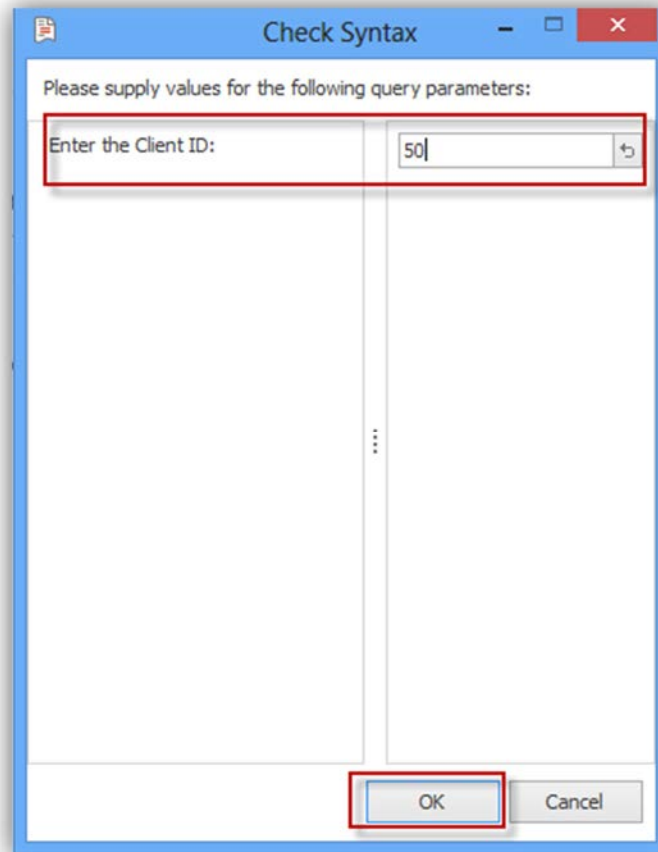
The screenshot shows the "Saved Queries" dialog box. At the top, there is a "Select Query" dropdown menu. To its right are "New" and "Remove" buttons. A red arrow points to the "New" button. Below the dropdown is a "Name" text field. Below that is a "Query" text area. A note above the text area states: "NOTE: All attribute names used in a saved query are case sensitive." At the bottom of the dialog are "Check Syntax", "Save", and "Cancel" buttons.

The screenshot below demonstrates a sample query. For instance, the attribute "Client ID" is used frequently; therefore, a saved query may be helpful to the user to locate documents easily. The query syntax is highlighted and entered as `[Client ID] = '{?Client ID: Enter the Client ID}'`. Clicking the "Check Syntax" button will display the "Parameter Prompt" window.



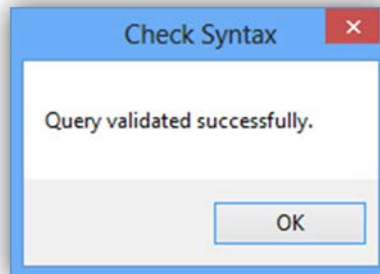
This screenshot shows the "Saved Queries" dialog box with a sample query entered. The "Name" field contains "Client ID Search". The "Query" text area contains the syntax `[Client ID] = '{?Client ID: Enter the Client ID}'`, which is highlighted with a red box. A red arrow points to the "Check Syntax" button at the bottom left. The "New" and "Remove" buttons are still visible at the top right, and "Save" and "Cancel" buttons are at the bottom right.

Enter a test string as shown below and then click “OK”.



The image shows a Windows-style dialog box titled "Check Syntax". At the top, it says "Please supply values for the following query parameters:". Below this, there is a label "Enter the Client ID:" followed by a text input field containing the number "50". A red rectangular box highlights the input field. At the bottom of the dialog, there are two buttons: "OK" and "Cancel". The "OK" button is also highlighted with a red rectangular box.

The dialogue box, “Check Syntax,” will inform the Administrator that the query validated successfully as noted below.



The image shows a smaller version of the "Check Syntax" dialog box. It now displays the message "Query validated successfully." in the center. At the bottom, there is a single "OK" button.

The Administrator is redirected back to the **Saved Queries** screen as shown below. Click "Save".

Saved Queries

Select Query New Remove

Name

NOTE: All attribute names used in a saved query are case sensitive.

Query

Check Syntax Save Cancel

See below for other syntax examples for creating new queries.

Query Syntax Example	Result
<code>[Employee Number] = '{?Employee Number: Enter an Employee Number}'</code>	Prompts the user to enter an employee number and searches across all Document Types for that value
<code>[DocumentType] IN ('W-4', 'Form I-9') AND ([Employee Number] = '{?Employee Number: Enter an Employee Number}')</code>	Prompts the user to enter an employee number and searches only the W-4 and Form I-9 document types for that value

Note: To execute a Saved Query, see the *ImageQuest User's Guide*.

Note: Document type names and attribute names are case sensitive in a Saved Query.

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. See below.


Document Destruction Rules


General


History

Document destruction rules listed below can be modified or previewed using the buttons below the grid. To destroy documents that a rule applies to, click on the Preview... button and in the window that appears click one of the "Destroy" buttons.

+ New Rule

 Preview

 Edit Rule

 Delete Rule

Name	Destroy documents ol...	Document age att...	Included Document Types
------	-------------------------	---------------------	-------------------------

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.

For example, the administrator wants to create a new rule to destroy all ImageQuest Employee Records where Date of Invoice is older than 7 days and Active = “False”.

The administrator enters “Invoice Date” for the Name and selects Document Type “Invoice”. The “Destroy documents that are older than:” value is changed to “7”, “Days” is selected from the drop-down and “Date of Invoice” 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 Invoice 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: Invoice Date

Document Types: Select All Clear

- ☐ Check
- ☐ Employee Record
- ☒ Invoice
- ☐ MFP Scan

Destroy documents that are older than: 7 Days

Determine document age using attribute: Date of Invoice

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.



In this example, the administrator will run the “Invoice Date” 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”.



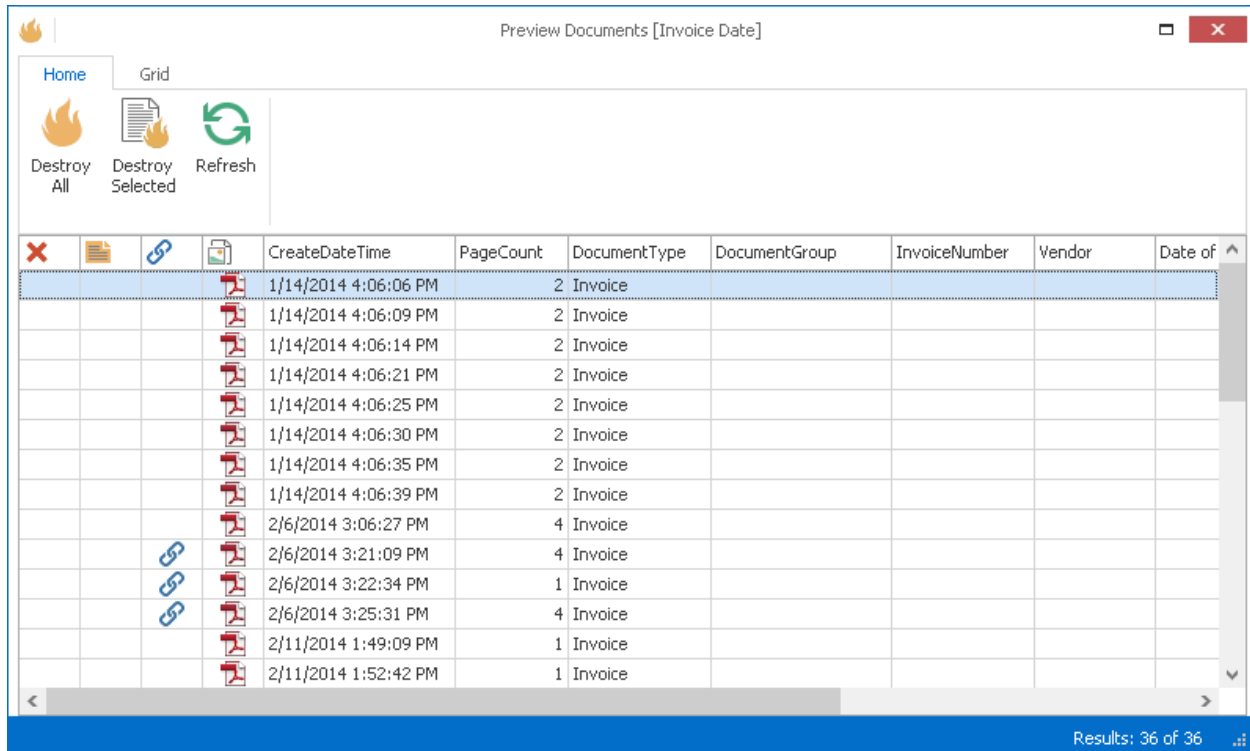
The “Preview Documents” window loads and includes the rule name in the title bar. The example on the following page displays 36 documents. At this point, the administrator has a few different options:

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

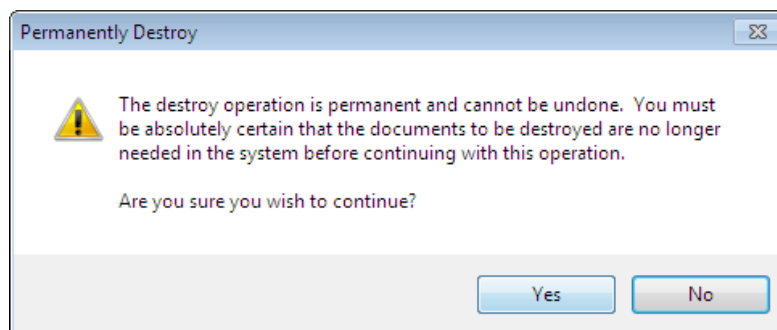
“Destroy Selected” will permanently destroy only the documents highlighted (selected) in the grid.

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”.



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 36 documents in the grid, so the Preview Window has 0 documents to display. If the administrator had selected 12 of the 36 documents and chose “Destroy Selected”, the Preview Window would display the remaining 24 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
5/28/2014 11:09:49 AM	Invoice Date DocumentType IN ('Invoice') AND ([CreateDateTime] <= '5/26/2014 11:09:49 AM')	INFORMA\nsouthard on EXAMPLE-SE...	36 selected, 36 destroyed, 0 failed
5/28/2014 11:06:16 AM	Invoice Date DocumentType IN ('Invoice') AND (Active=False) AND ([Date of Invoice] <= '5/27/2014 11:06:16 AM')	INFORMA\nsouthard on EXAMPLE-SE...	0 selected, 0 destroyed, 0 failed
5/28/2014 10:25:23 AM	[SYSTEM] - Destroy deleted documents ([Deleted] = True) AND ([CreateDateTime] <= '1/28/2014 10:25:23 AM')	INFORMA\nsouthard on EXAMPLE-SE...	0 selected, 0 destroyed, 0 failed

History entry details

RunDateTime: 5/28/2014 11:09:49 AM

Rule: Invoice Date

Username: INFORMA\nsouthard on EXAMPLE-SERVER

Details: DocumentType IN ('Invoice') AND ([CreateDateTime] <= '5/26/2014 11:09:49 AM')

Results: 36 selected, 36 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.

Destroy Deleted Documents

ImageQuest has the following feature: 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 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.

 Preview...

Rule execution history 

RunDateTime	Rule	Username	Results

History entry details

RunDateTime:

Rule:

Username:

Details:

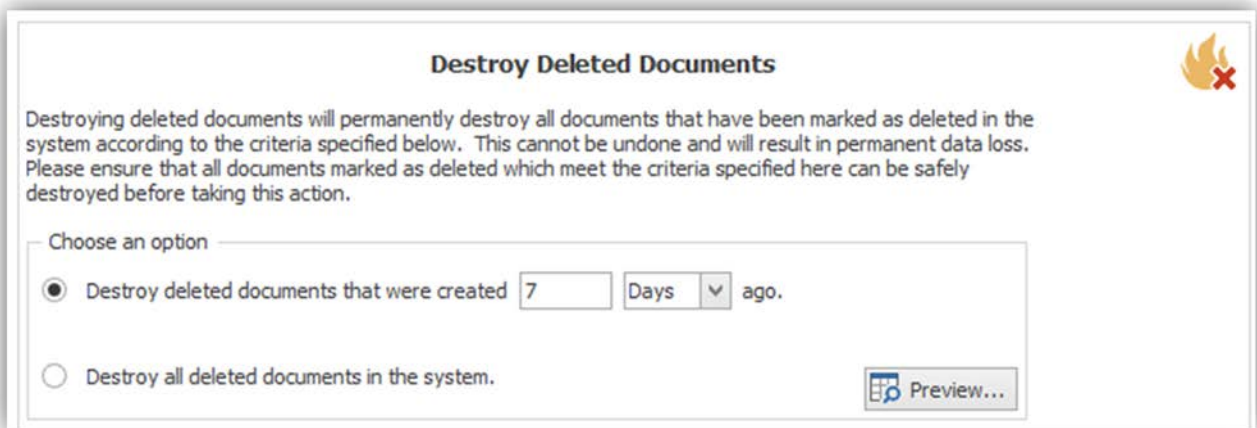
^
v

Results:

The “Choose an option” section allows the administrator to determine which deleted documents can be destroyed: documents created a certain number of 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.




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.

 Preview...

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 4 documents. At this point, the administrator has a few different options:

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

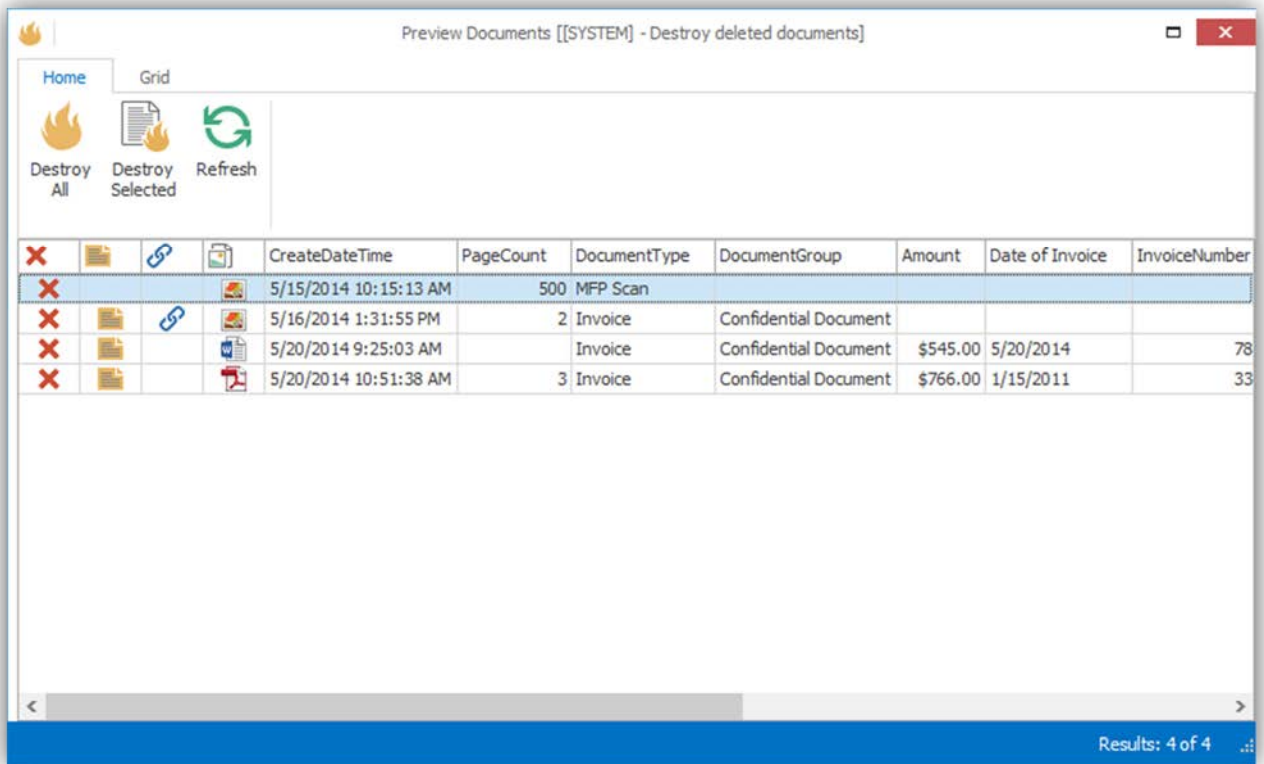
“Destroy Selected” will permanently destroy only the documents highlighted (selected) in the grid. The administrator can hold down the CTRL key to select multiple documents.

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.

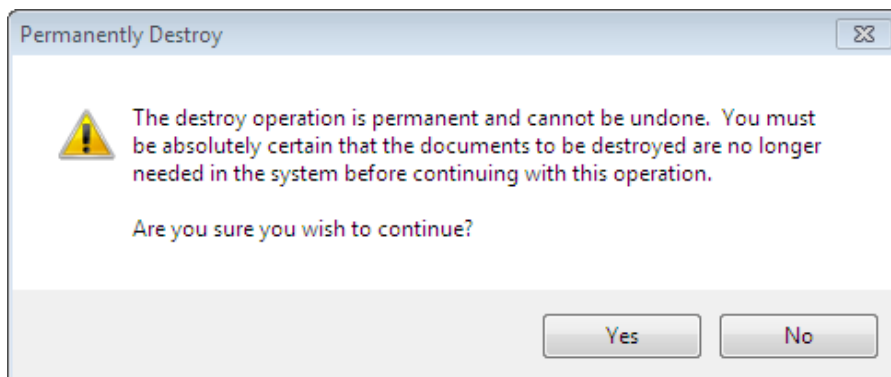
For this example, the administrator will select “Destroy All”.



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

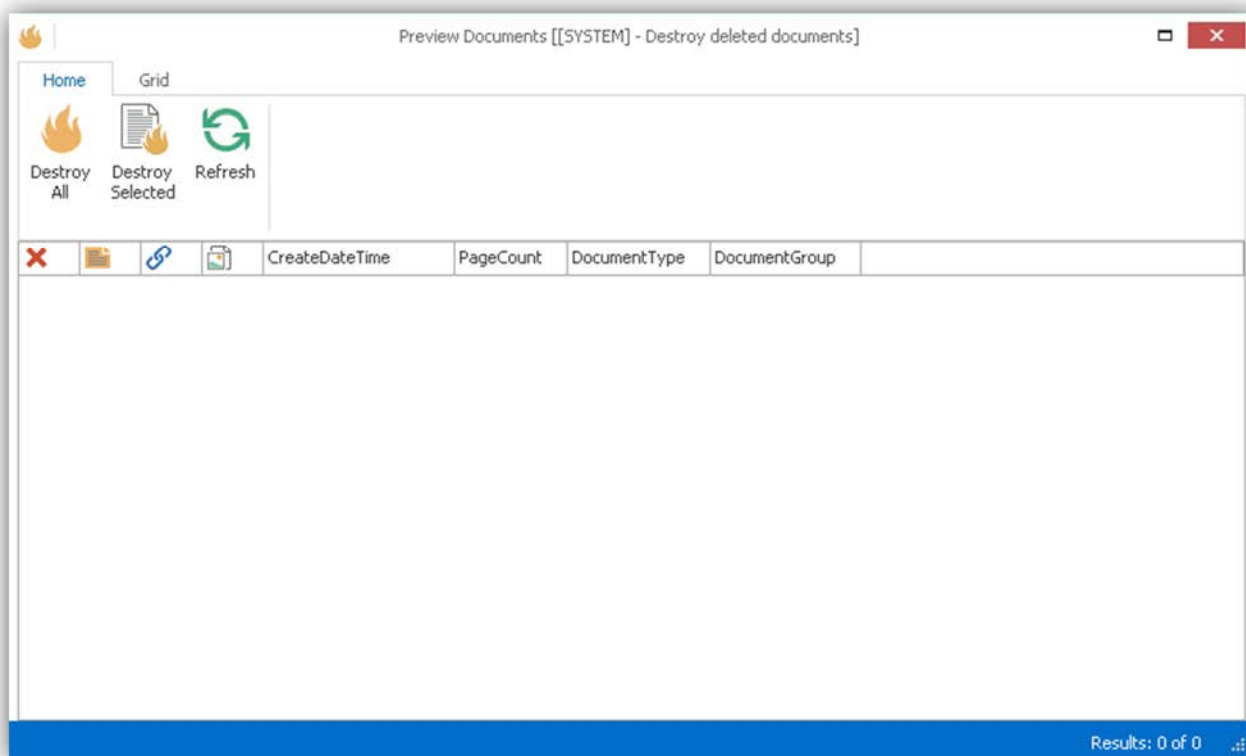
Click “No” to cancel the operation and return to the Preview Documents window and none of the documents will be destroyed.

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 4 documents in the grid, so the Preview Window has 0 documents to display. If the administrator had selected 2 of the 4 documents and chose “Destroy Selected”, the Preview Window would display the remaining 2 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.

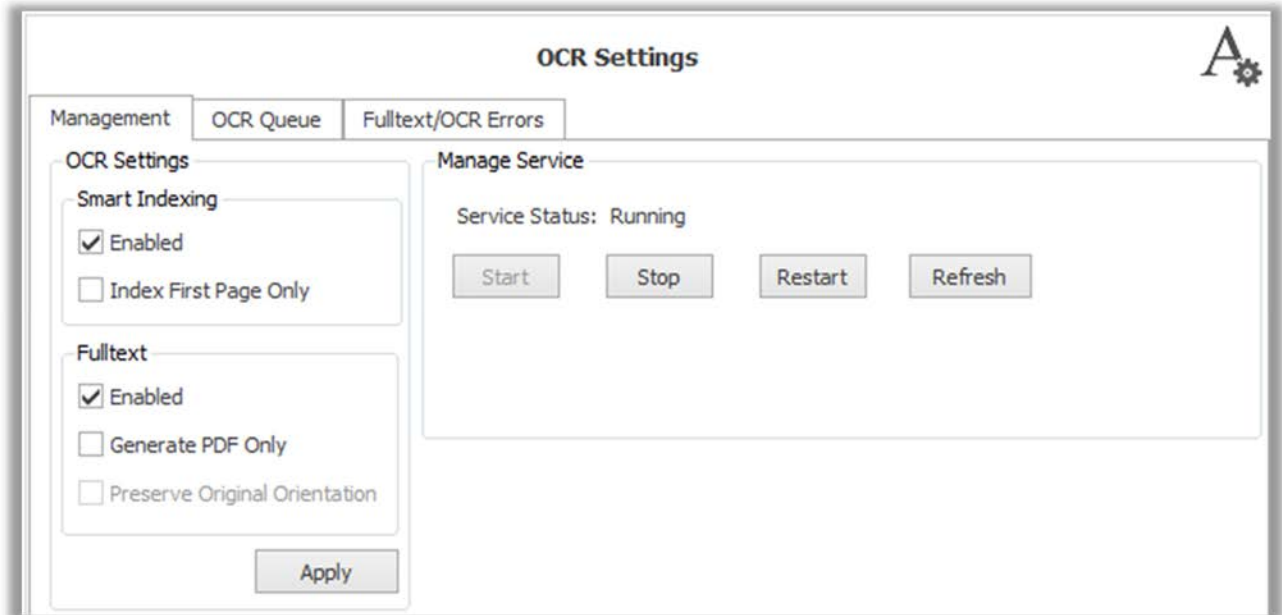
Rule execution history			
RunDateTime	Rule	Username	Results
5/28/2014 11:12:00 AM	[SYSTEM] - Destroy deleted documents [[Deleted] = True) AND ([CreateDateTime] <= '5/21/2014 11:12:00 AM')	INFORMA\nsouthard on EXAMPLE-S...	1 selected, 1 destroyed, 0 failed
5/28/2014 11:09:49 AM	Invoice Date DocumentType IN ('Invoice') AND ([CreateDateTime] <= '5/26/2014 11:09:49 AM')	INFORMA\nsouthard on EXAMPLE-S...	36 selected, 36 destroyed, 0 failed
5/28/2014 11:06:16 AM	Invoice Date DocumentType IN ('Invoice') AND (Active=False) AND ([Date of Invoice] <= '5/27/2014 11:06:16 AM')	INFORMA\nsouthard on EXAMPLE-S...	0 selected, 0 destroyed, 0 failed
5/28/2014 10:25:23 AM	[SYSTEM] - Destroy deleted documents [[Deleted] = True) AND ([CreateDateTime] <= '1/28/2014 10:25:23 AM')	INFORMA\nsouthard on EXAMPLE-S...	0 selected, 0 destroyed, 0 failed
History entry details			
RunDateTime:	5/28/2014 11:12:00 AM		
Rule:	[SYSTEM] - Destroy deleted documents		
Username:	INFORMA\nsouthard on EXAMPLE-SERVER		
Details:	[[Deleted] = True) AND ([CreateDateTime] <= '5/21/2014 11:12:00 AM')		
Results:	1 selected, 1 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.

OCR Settings

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

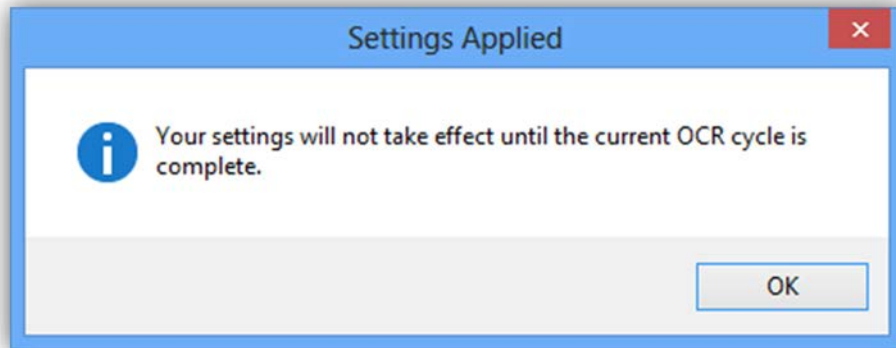


To enable or disable Smart Indexing, Fulltext, or both; check or uncheck the appropriate box and click “Apply”.

With Smart Indexing checked, you have the ability to use the Index First Page Only option. This will take advantage of the Smart Indexing feature, but limit this feature to the first page of the batch of documents. By default, this is unchecked or disabled and will perform Smart Indexing on the entire batch of documents.

While the Fulltext checkbox is selected, you have the ability to select the Generate PDF Only option. This leverages the OCR process to generate a PDF document from the image, without performing full-text OCR results for keyword searches. The Fulltext feature also gives you an option to keep your original document orientation by using the Preserve Original Orientation option. This can only be enabled if you are NOT using the Smart Indexing feature.

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.

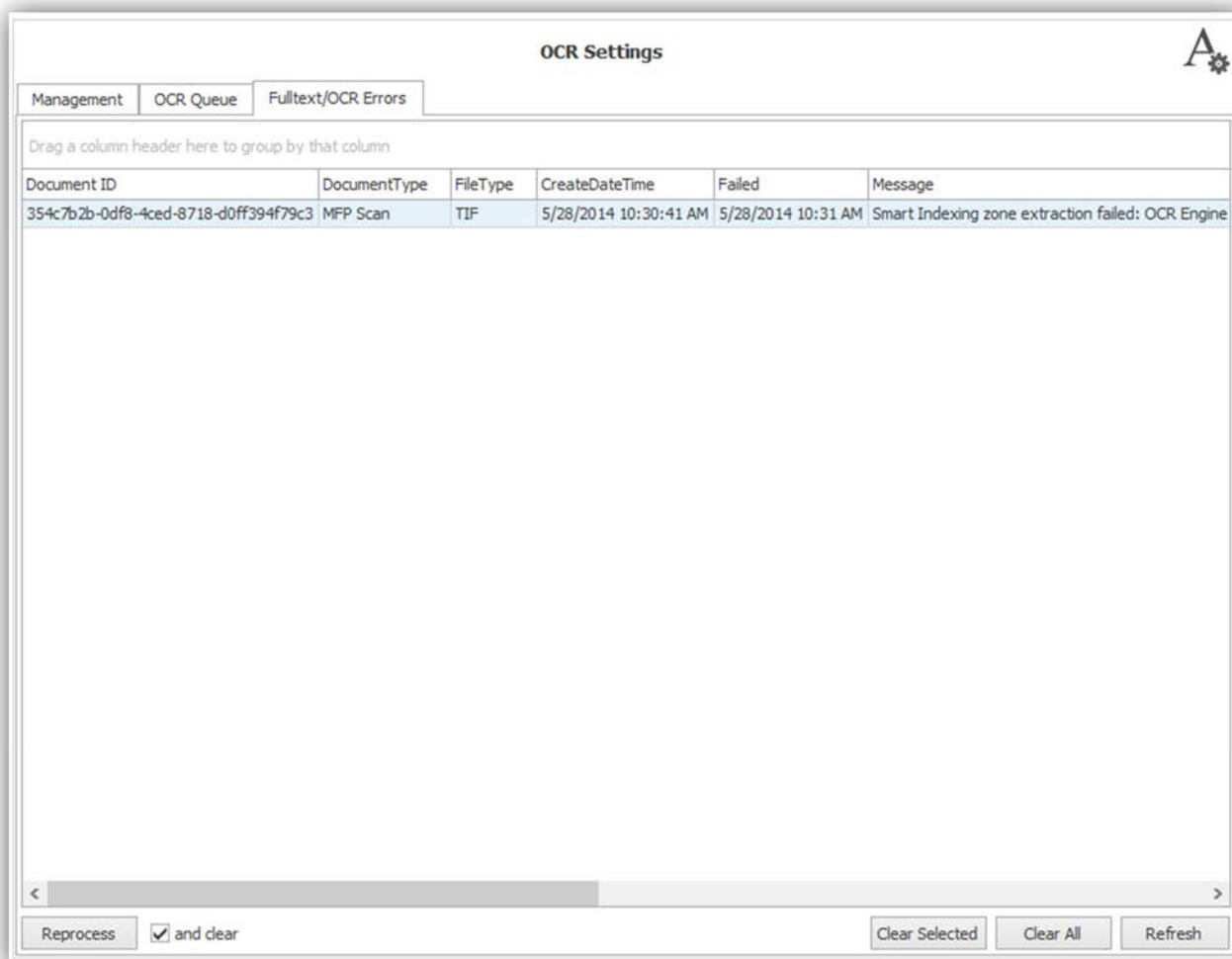
The OCR service benefits from multi-core, hyper-threaded and multi-CPU systems (up to 4 cores) resulting in much faster processing times.

There are two other tabs under the OCR settings menu (resulting in 3 total 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								
<div> Management OCR Queue Fulltext/OCR Errors </div>								
Drag a column header here to group by that column								
Ordinal	OCR Type	Cabinet	DocumentType	FileType	PageCount	Size (MB)	CreateDateTime	Document Id
0	SmartIndexing	ImageQuest	MFP Scan	TIF	1	0.02	5/28/2014 10:30 AM	b2163f54-8d83-4e3f-848d-5e2f5c0a0c30
1	SmartIndexing	ImageQuest	MFP Scan	TIF	3	0.15	5/28/2014 10:30 AM	24d98dc7-eca8-4ea0-aa41-38d7d2718f20
2	SmartIndexing	ImageQuest	MFP Scan	TIF	1	1.28	5/28/2014 10:30 AM	354c7b2b-0df8-4ced-8718-d0ff394f79c3
3	SmartIndexing	ImageQuest	MFP Scan	TIF	1	0.03	5/28/2014 10:30 AM	d65fe5e8-6896-434b-8ade-0a67b6e722d1
4	SmartIndexing	ImageQuest	MFP Scan	TIF	1	0.03	5/28/2014 10:30 AM	297928d3-2258-45e6-871d-4087c7ae0ba9
5	SmartIndexing	ImageQuest	MFP Scan	TIF	8	0.43	5/28/2014 10:30 AM	62f1073b-5187-4836-8749-b64d7aa14d85
6	SmartIndexing	ImageQuest	MFP Scan	TIF	4	0.21	5/28/2014 10:30 AM	2ebb791d-9ae8-4ad9-bb2d-40632ffa7ed3
7	SmartIndexing	ImageQuest	MFP Scan	TIF	5	0.26	5/28/2014 10:30 AM	07f5261d-9542-41c8-a810-6eb643c37500
8	SmartIndexing	ImageQuest	MFP Scan	TIF	1	0.16	5/28/2014 10:30 AM	b8b00df8-ebff-407d-9e9f-f2ccc5adde86
9	SmartIndexing	ImageQuest	MFP Scan	TIF	1	0.07	5/28/2014 10:30 AM	1009caa5-895d-4bac-9fbd-2b8a0660c7b5
10	SmartIndexing	ImageQuest	MFP Scan	TIF	41	11.08	5/28/2014 10:30 AM	0a2426c3-b6d7-4418-8cff-2da4f24294d4
11	SmartIndexing	ImageQuest	MFP Scan	TIF	1	0.26	5/28/2014 10:30 AM	53323745-1db9-40bb-a2aa-1cc7ce846415
12	SmartIndexing	ImageQuest	MFP Scan	TIF	2	0.17	5/28/2014 10:30 AM	977b5b19-b5a2-4efd-b85b-d16afa7be78f
13	SmartIndexing	ImageQuest	MFP Scan	TIF	500	45.31	5/28/2014 10:30 AM	f96d4453-6c19-4f5a-bfb3-4b332cd44b03
14	SmartIndexing	ImageQuest	MFP Scan	TIF	3	0.12	5/28/2014 10:30 AM	d51b335c-3cb3-4b4a-a065-de1a2c5a884c
15	SmartIndexing	ImageQuest	MFP Scan	TIF	3	0.12	5/28/2014 10:30 AM	8b9ffa79-fceb-4533-ba98-9ed41f9cc509
16	SmartIndexing	ImageQuest	MFP Scan	TIF	3	0.12	5/28/2014 10:30 AM	23514ae9-6667-4bf8-9af2-117278467b5d
17	SmartIndexing	ImageQuest	MFP Scan	TIF	74	4.27	5/28/2014 10:30 AM	5addb092-d2b5-426a-9a5c-3e49ac8ad86a
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.




Attribute Lookup Configuration

Attribute Lookup Configuration allows the ImageQuest administrator to configure and manage Attribute Lookup settings from IQadministrator. This leverages an external data-source for retrieval of information but it cannot be used to update the originating data-source.

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

▼

Test

Query

Insert Token

Optional Field Mappings

Source Field Name	Attribute
	<div style="border: 1px solid #ccc; width: 15px; height: 15px; text-align: center; line-height: 15px;">×</div>

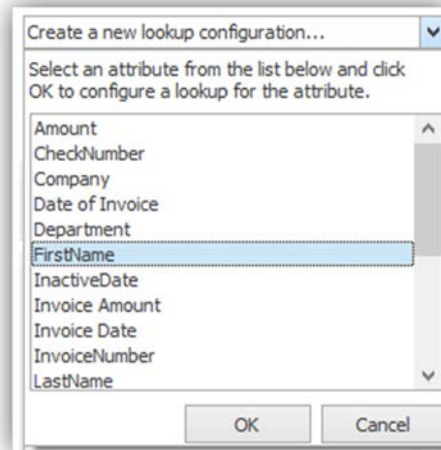
Test Input

Test

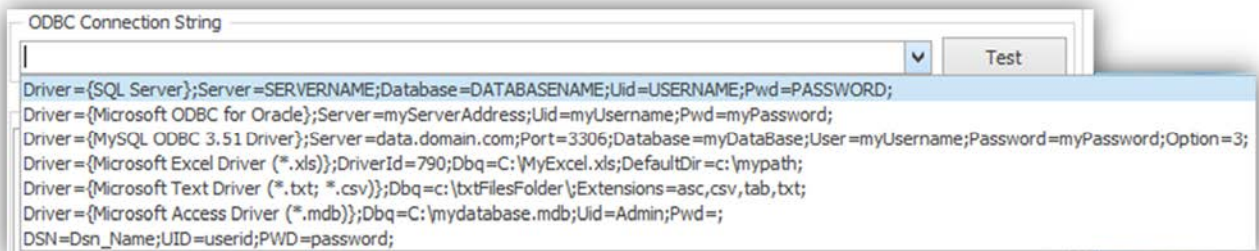
Delete

Save

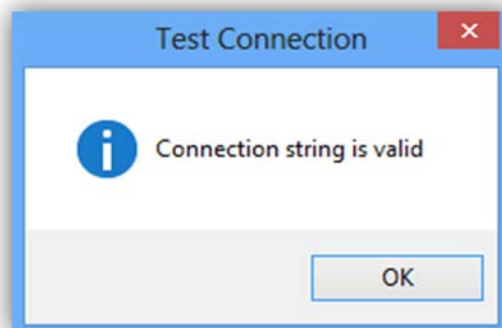
To create a new lookup, first select an ImageQuest Attribute to be used as the Keyfield. `FirstName` is selected in the example below. Click OK to continue and to configure the lookup.



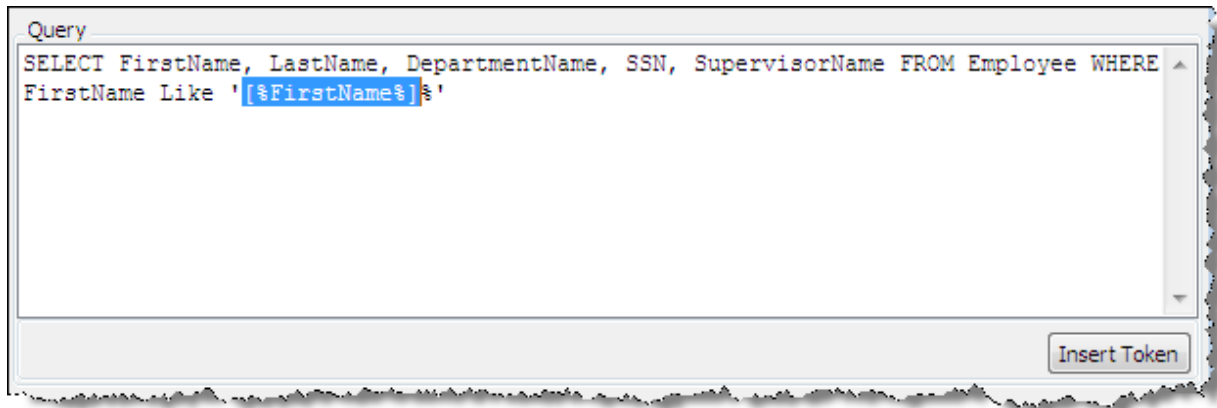
Next, select an ODBC Connection String for the data source from the drop-down. The list provides some commonly used ODBC string templates that may be used. If you do not see an ODBC Connection string for your type of database, one can manually be typed in.



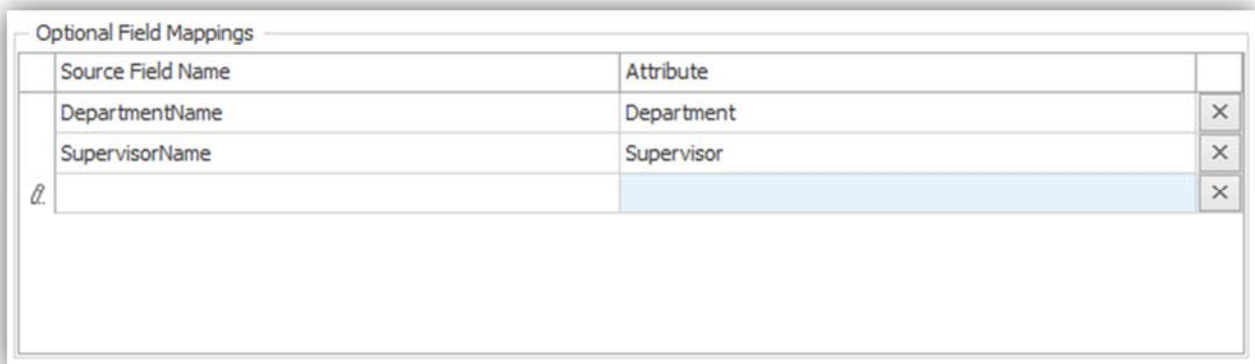
Configure the ODBC Connection String by providing the required parameters for the chosen connection string. Click “Test” to test the connection and confirm it is valid and then click OK to continue.



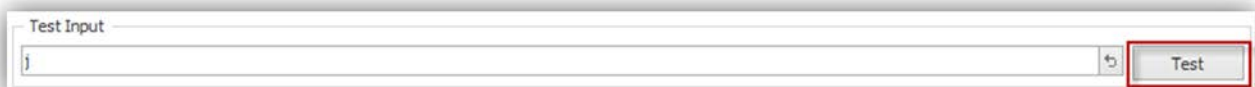
Enter the SQL query to be used by the Attribute Lookup to retrieve records from the data source. Click the “Insert Token” button to add the keyfield to the select statement in the proper syntax. In the example below, “[%FirstName%]” is added. The apostrophes are needed because the keyfield is a text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



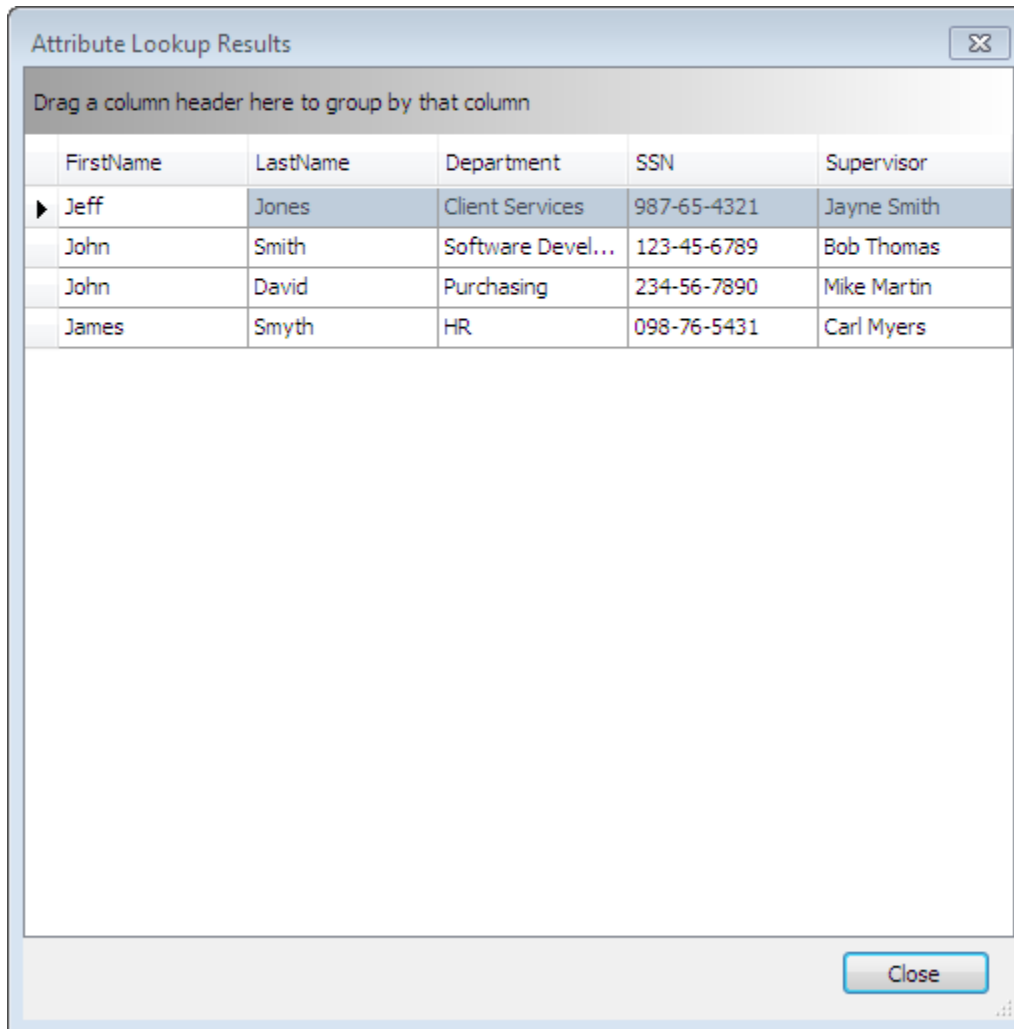
The Optional Field Mappings section allows the ImageQuest administrator to map a data source column (Source Field Name) to an ImageQuest attribute (Attribute) if the names are not the same.



The 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 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.

A screenshot of a software window titled "Attribute Lookup Results". The window has 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". Underneath is a table with five columns: "FirstName", "LastName", "Department", "SSN", and "Supervisor". The table contains four rows of data, all starting with "J" in the first column. The first row is highlighted with a blue background. 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

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				
 New Rule  Edit Rule  Delete Rule				
Name	Date Attribute	Days Notice	Days Recurring	Message
Contract Expiration	TransactionDate	120	15	This contract will expire in 120 days
Invoice Payment Due	Date of Invoice	10	2	Invoice payment is due in 10 days or less

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

- Monitors the attribute called TransactionDate for documents that will expire within 120 days from today's date
- Sends an e-mail to all members of the GLProcessor (Role) with a link to the document in WebIQ
- A recurring email will be sent to all members of this role every 15 days after the initial e-mail is sent.
- The document will be routed to the work queue for all members of this 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

[Document Type]='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.

Workflow Settings*

Accounts Payable Workflow is an add-in to ImageQuest. Accounts Payable Workflow is designed to help you capture invoice data necessary for approvals and voucher entry into your ERP or accounting system. Data typically captured includes vendor, invoice date, invoice number, purchase order number and invoice total. The invoice may then be routed for approval to any number of users using ImageQuest's built-in ad-hoc workflow. General ledger codes, which are linked directly from your ERP or accounting system for validation, may be added at any step in the process. Once approved, a voucher will be created which may be posted to your ERP or accounting system for payment. Integration is possible with any system which will accept an XML or CSV file for voucher import. If desired, a record of the entire transaction may be recorded in ImageQuest at completion of the workflow.

With accountability and tracking in mind, the system uses its already proven auditing capabilities to insure timely delivery, approval, and denials of company documentation using both the ImageQuest Work Queue and email notification features of each step in the workflow process. (See Work Queue and Document History for more information.)

Workflow Definitions*

Building on the ad-hoc variety of workflow described above, Workflow Definitions allows Informa's Client Services team to create an automated workflow process based on your current manual processes. Based on information such as vendor or invoice amount, the system will automatically move the invoice through each step of the process. This approach virtually eliminates any human decisions as to where the invoice goes next, providing a consistent and robust solution to your accounts payables approvals process.

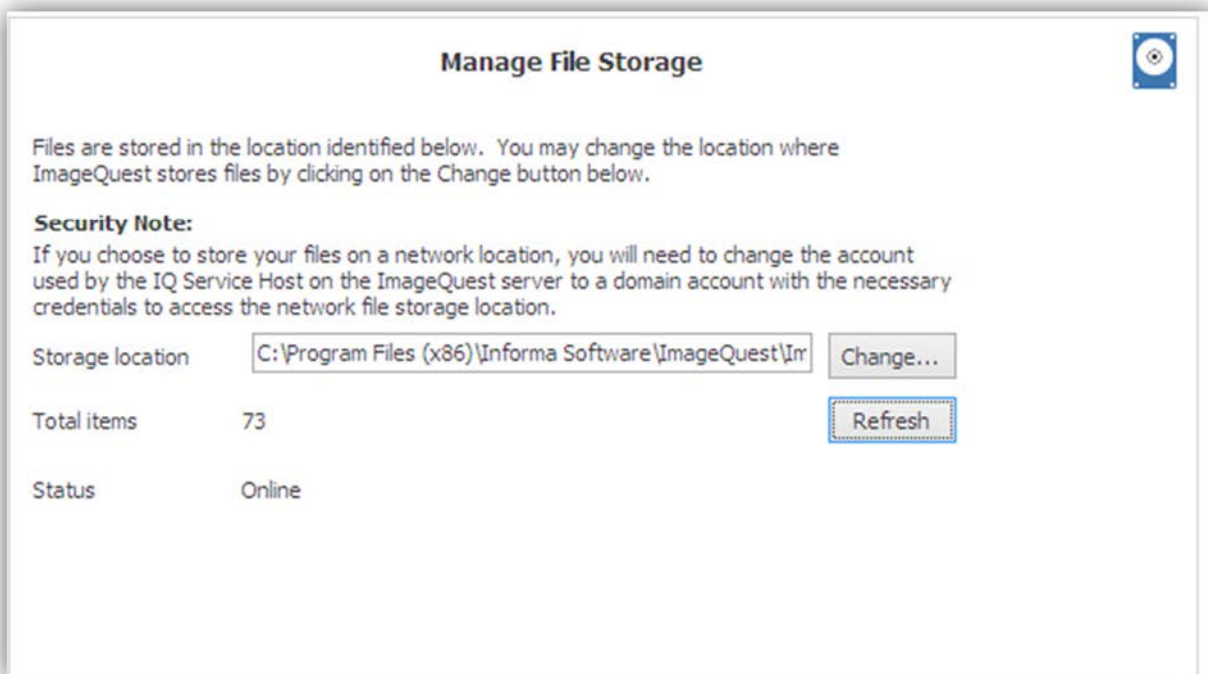
*Please contact the Informa Software's Sales or Client Services team for additional information.

Manage File Storage

IQadministrator easily allows the Administrator to manage the storage and location of files. Click **Manage File Storage** to access the **Manage File Storage** screen as illustrated below.

Manage File Storage 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.

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

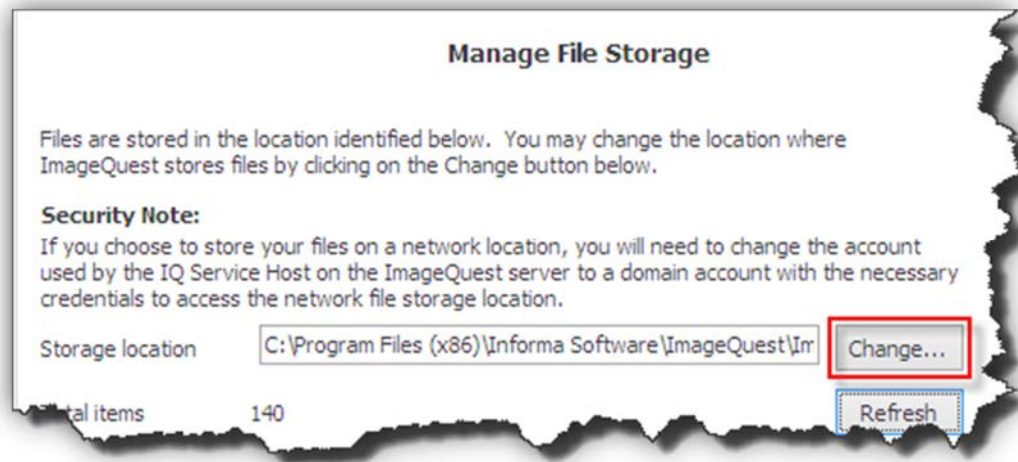
Files are stored in the location identified below. You may change the location where ImageQuest stores files by clicking on the Change button below.

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	C:\Program Files (x86)\Informa Software\ImageQuest\Im	Change...
Total items	73	Refresh
Status	Online	

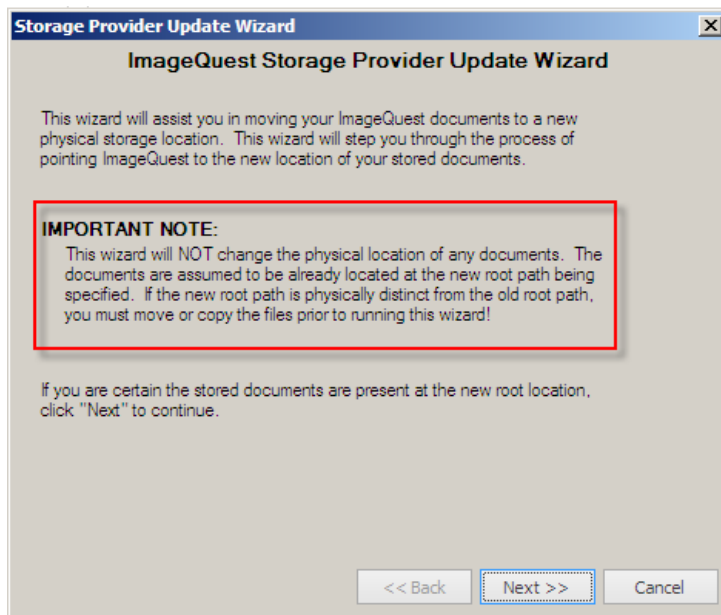
The “Storage location” field shows the current location where the files are stored. The “Total items” value shows the total number of files in the “Images” folder; the “Refresh” button allows the Administrator to update the “Total items” count.

To change the “Storage location”, click the “Change” button as illustrated below.

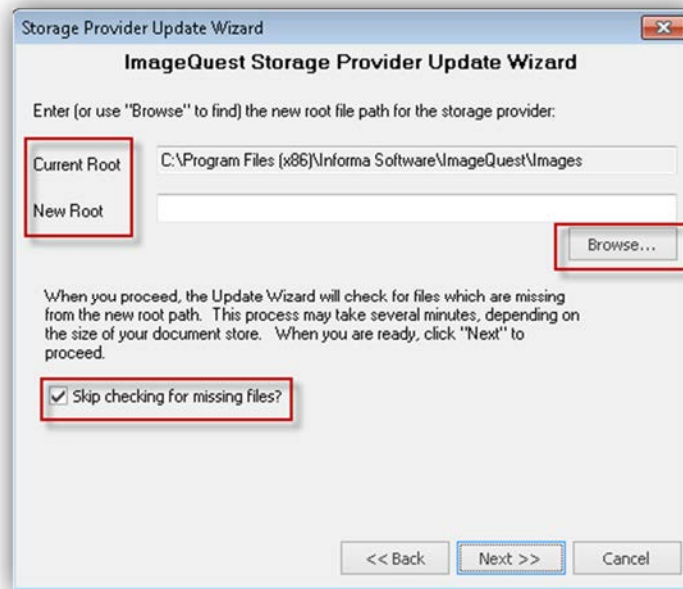


Note: The storage location is exclusive to ImageQuest, with its own folder structure, and should not be modified in any way.

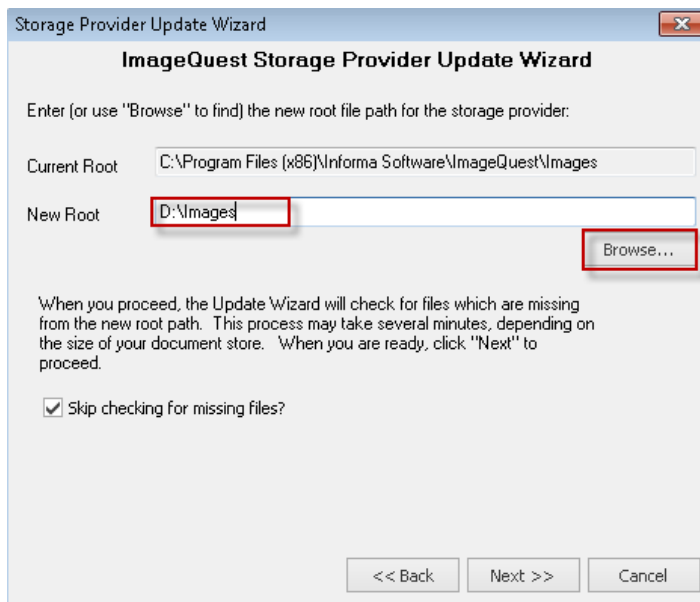
The “ImageQuest Storage Provider Update Wizard” guides the Administrator through the process of changing the file storage location. Read the highlighted notes carefully and click “Next” to proceed.



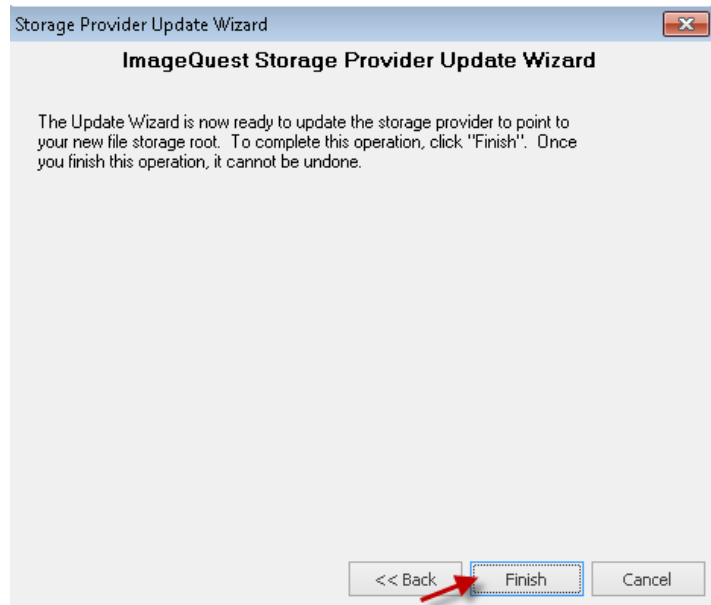
The “Current Root” field, highlighted below, shows the current location of the IQ files. To change the folder, either type in the new path or click “Browse” to choose a new root file path.



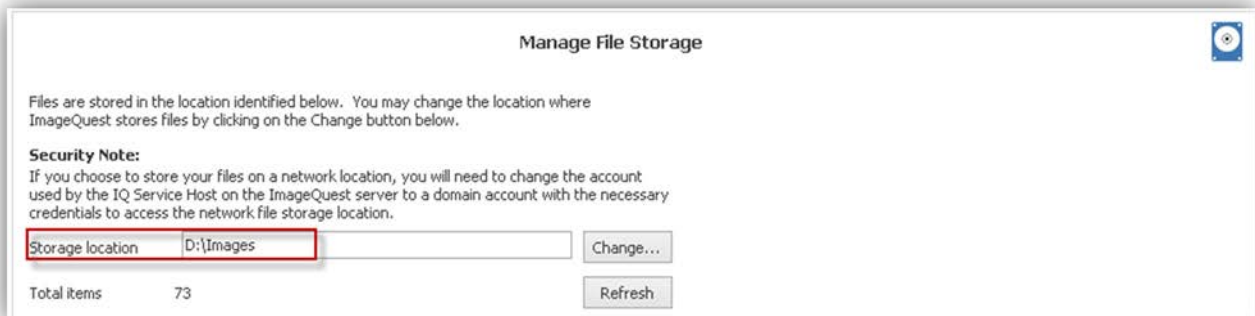
Enter the new root folder in the “New Root” field as displayed below. Click “Next” to proceed. As you proceed, the “Update Wizard” will check for files which are missing from the new root path unless “Skip checking for missing files” is checked; this process may take several minutes depending on the size of your document storage. By default, the “Skip checking for missing files” checkbox is checked. Click “Next”.



The “ImageQuest Storage Provider Update Wizard” screen prompts the Administrator to update the new file storage root. Click “Finish” to complete this operation as shown below.



The Manage File Storage screen below now displays the new “Storage location”.



Note: The “Storage Provider Update Wizard” does NOT move any files; it simply allows the Administrator to redirect the physical image storage location for new documents. The Administrator must manually move the existing root folder to the new storage location.

Note: If a network storage location will be used for storage, the IQApplication service will need to have a user account with full control of the shared location. Please see the Advanced Configuration starting on page 132.

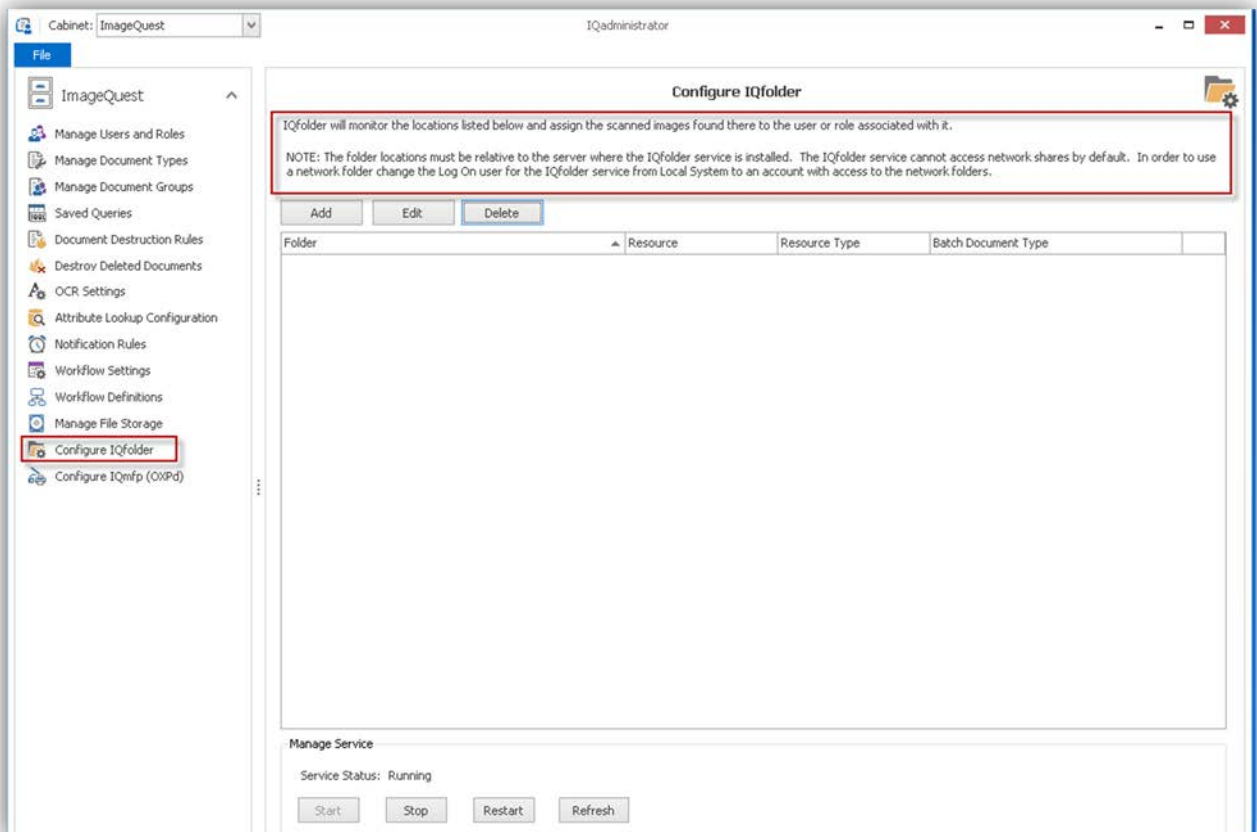
Configure IQfolder

IQfolder is a service that runs on the IQ Server to poll user defined folders for .TIF and .PDF files making them accessible from the Indexing Queue in IQdesktop.

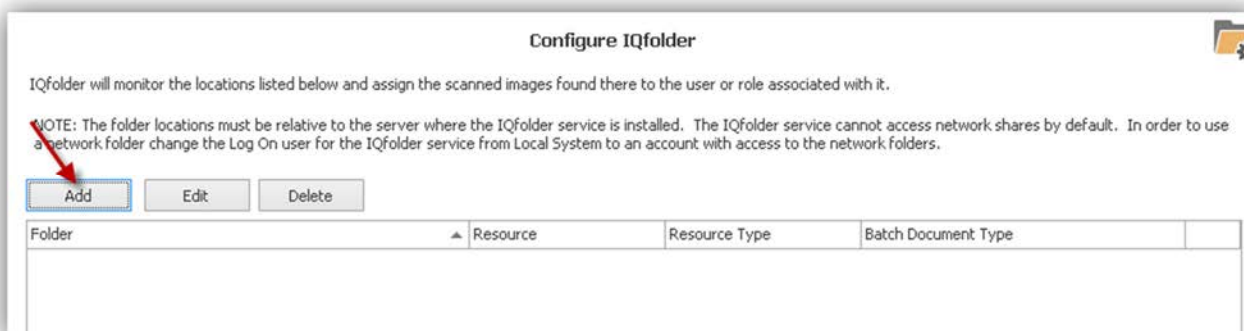
Note: .TIF and .PDF files should be saved as multi-page files in order for the scan to show up as a single document in the Indexing Queue.

The first configuration step is to create the folder locations where scanned .TIF or .PDF images will be saved. IQfolder supports an unlimited amount of folders.

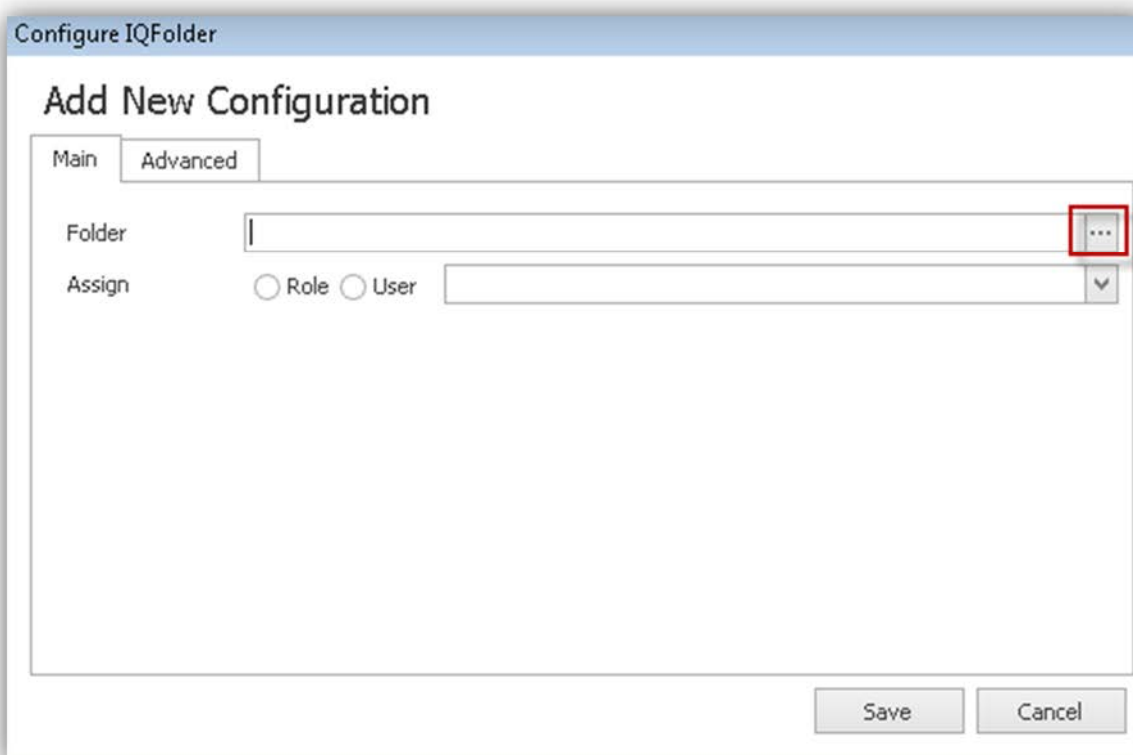
Configure the folder location path in *IQadministrator*; select **Configure IQfolder** as shown below. Read the highlighted notes in the window for more information.



Click "Add" to create a new IQfolder folder.

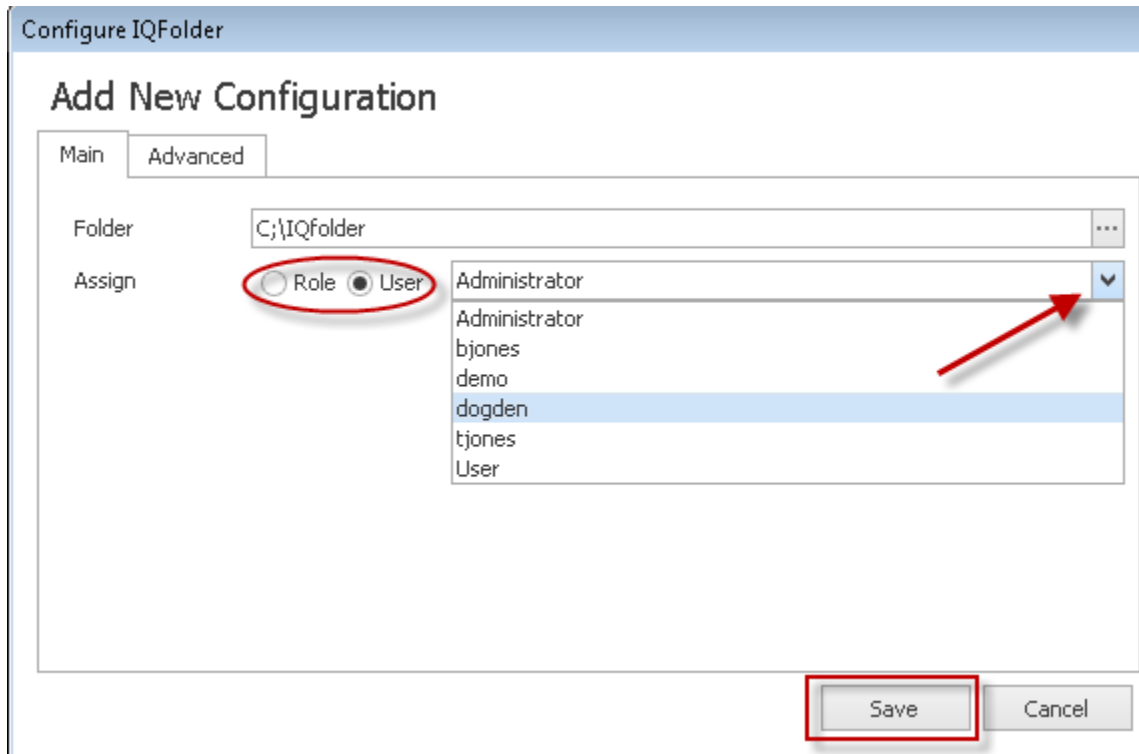


Click the ellipsis button (...) to browse to and/or create the folder to be polled.

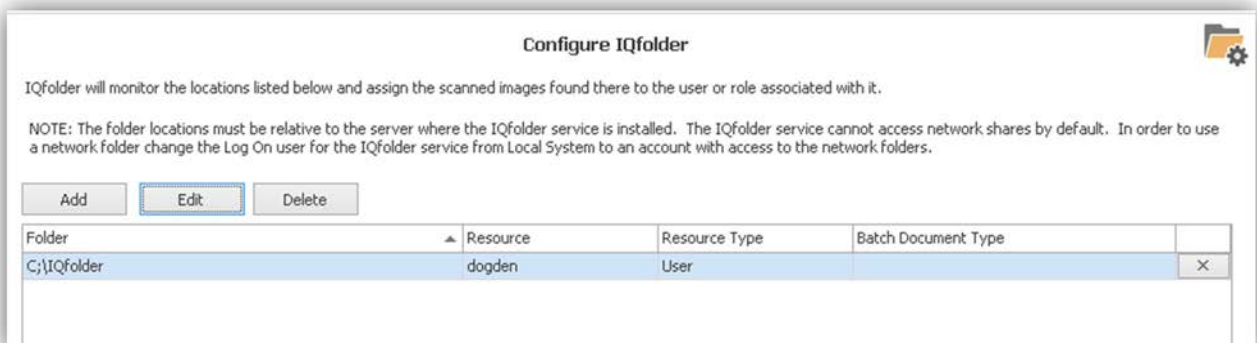


Select the User or Role to assign the folder to.

If the folder is assigned to a Role, the scanned files will appear in the "Indexing Queue" for every member of that Role. Only one user can access and index the file at one time. Once a member of the Role has indexed the file, it will no longer appear in the other member's "Indexing Queue".



Click the "Save" button to save the changes.



Click “Edit” to modify an existing folder configuration or “Delete” to remove an existing folder. The ‘X’ at the end of an IQfolder configuration line can also be used to remove an existing folder configuration.

The “Advanced” tab can be used to set default values for attributes and document type on a folder by folder basis. This can be useful for grouping documents in the indexing queue based on the folder in which they came from. This attribute value will also be carried over during the indexing process when a new document type is selected. In the example below, an attribute called Priority IQ has been added to this folder with a value of 1.

Configure IQFolder

Add New Configuration

Main **Advanced**

Attributes: Priority IQ ▼ 1 ↺ +

Attribute ▲	Value	
Priority IQ	1	✕

Documents will still need to be manually indexed and assigned a Document Type regardless of the Batch Document Type.

Batch Document Type: ▼ ↺

Save Cancel

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.

Manage Service

Service Status: Running

Start Stop Restart Refresh

Note: In addition to browsing for folders, a folder path can be typed or pasted.

Note: The folder locations are relative to the server where the IQ folder service is installed.

Note: A folder can be assigned to either a User or Role; it cannot be assigned to both.

Note: Refer to the scanner user's guide for more information on configuring the device to scan and save .TIF images to folders.

Note: It is recommended to scan Black & White (B & W) images at 300 dpi, and color images at 150 dpi.

Note: If a network storage location will be used for IQfolder, the IQfolder Image Importing service will need to have a user account with full control of the shared location. Please see the Advanced Configuration starting on page 133.

Configure IQmfp (OXPd)

“Configure IQmfp (OXPd)” is 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 or higher.**

Before adding a new device, the OXPd Solution Installer must be installed on the device. **If OXPd is already installed on the device, please proceed to page 127 for configuration.**

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
- M4500 series: Natively Supported

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

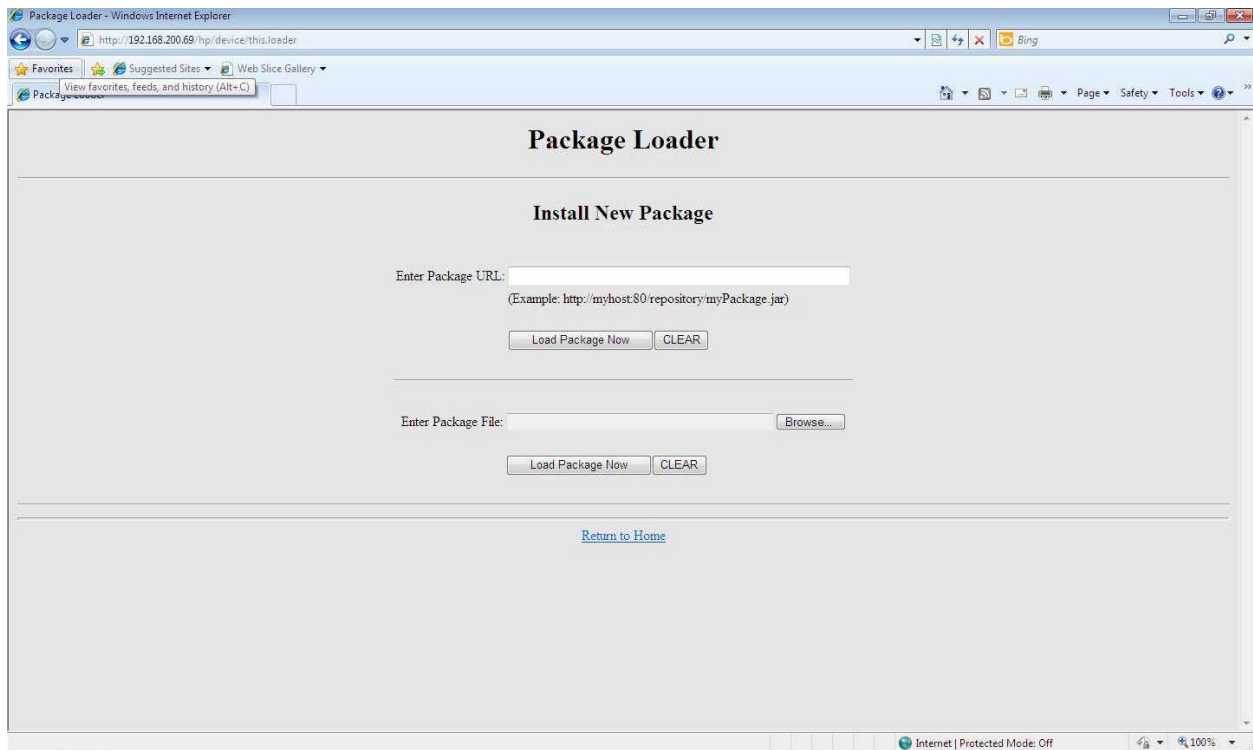
HP device firmware can be downloaded from <http://www.hp.com>.

NOTE: Any newer HP MFP device that has OXPd already installed is supported.

Loading the OXPd Solutions Installer onto the device

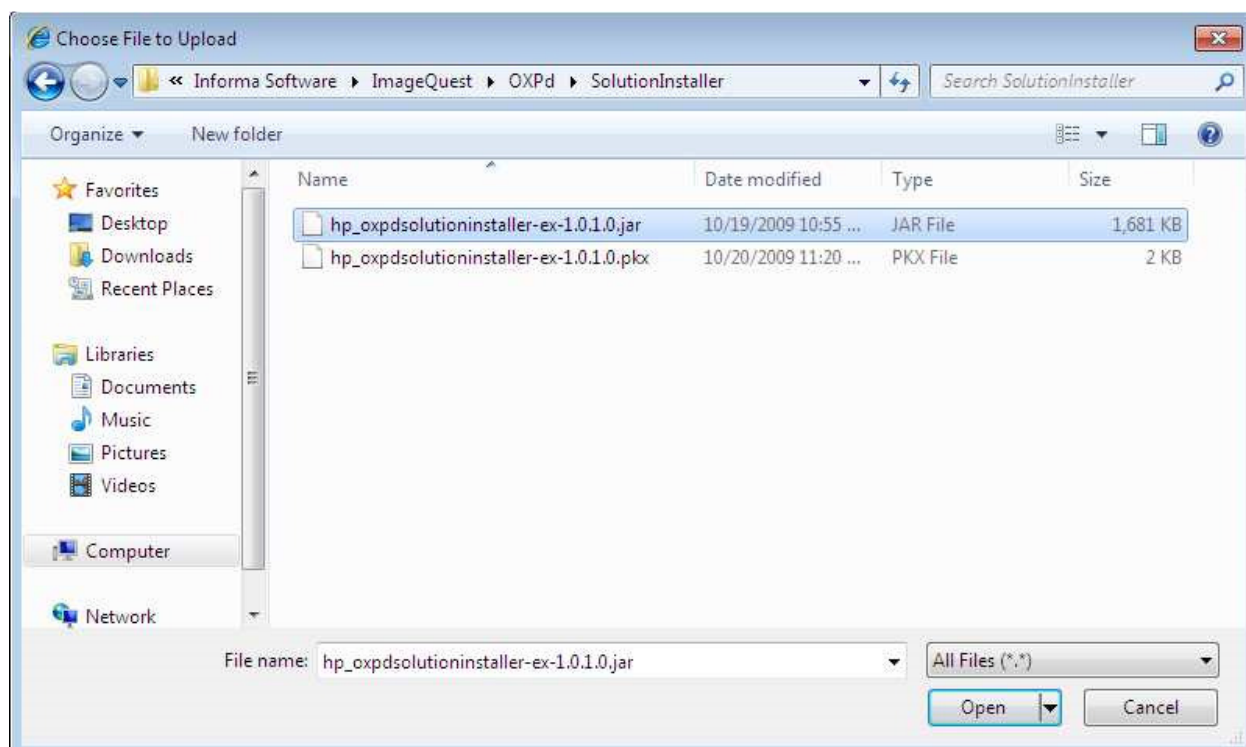
Browse to <http://<deviceIPaddress>/hp/device/this.loader> from the ImageQuest server to access the HP device Package Loader page. You will need to provide the device admin credentials to access the page.

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.

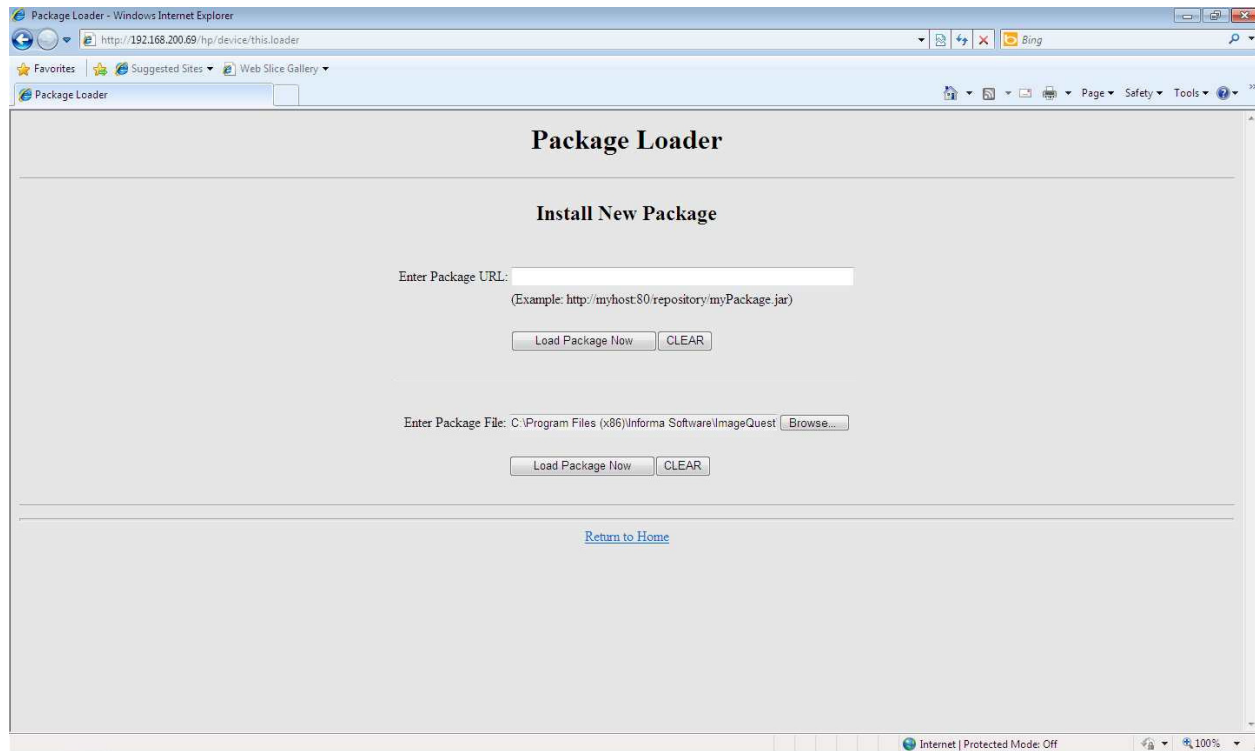


For example, if the ImageQuest Server was installed to C:\Program Files(x86)\Informa Software, the OXPd Solution Installer jar file would be located in C:\Program Files(x86)\Informa Software\ImageQuest\OXPd\SolutionInstaller.

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

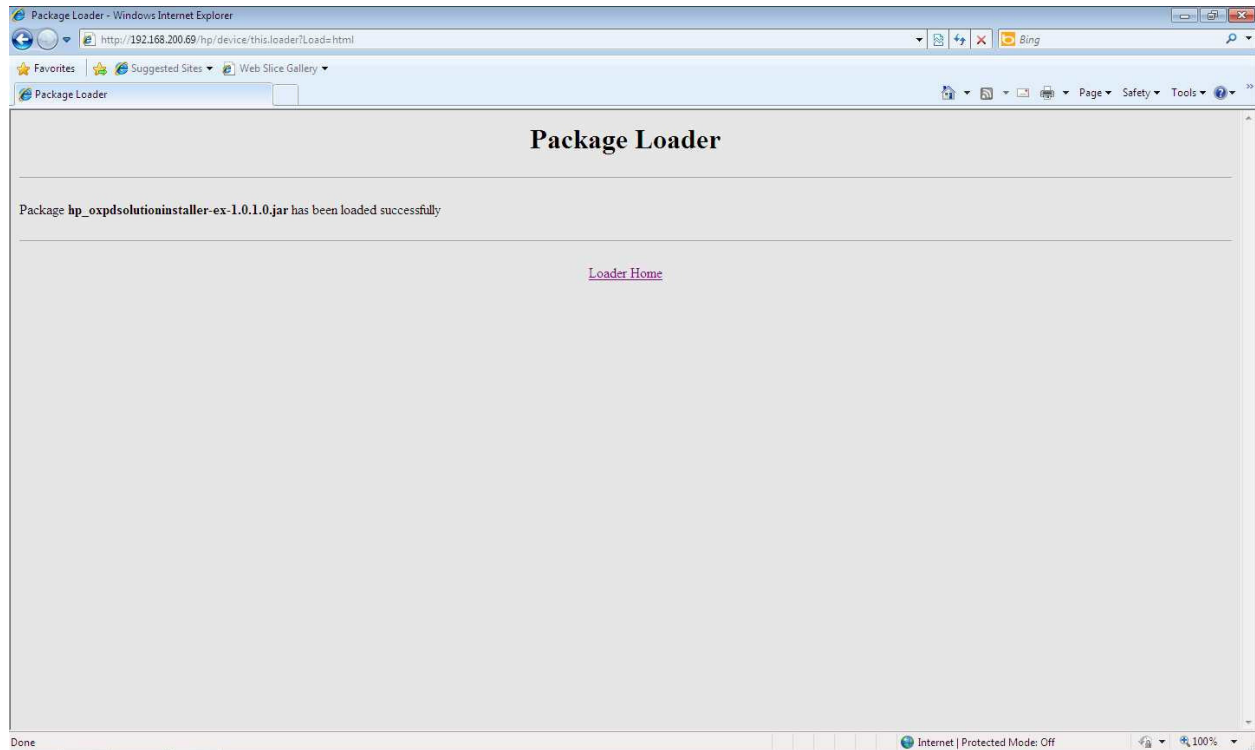


Click “Load Package Now” to load the jar file. It may take a few minutes to load.



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

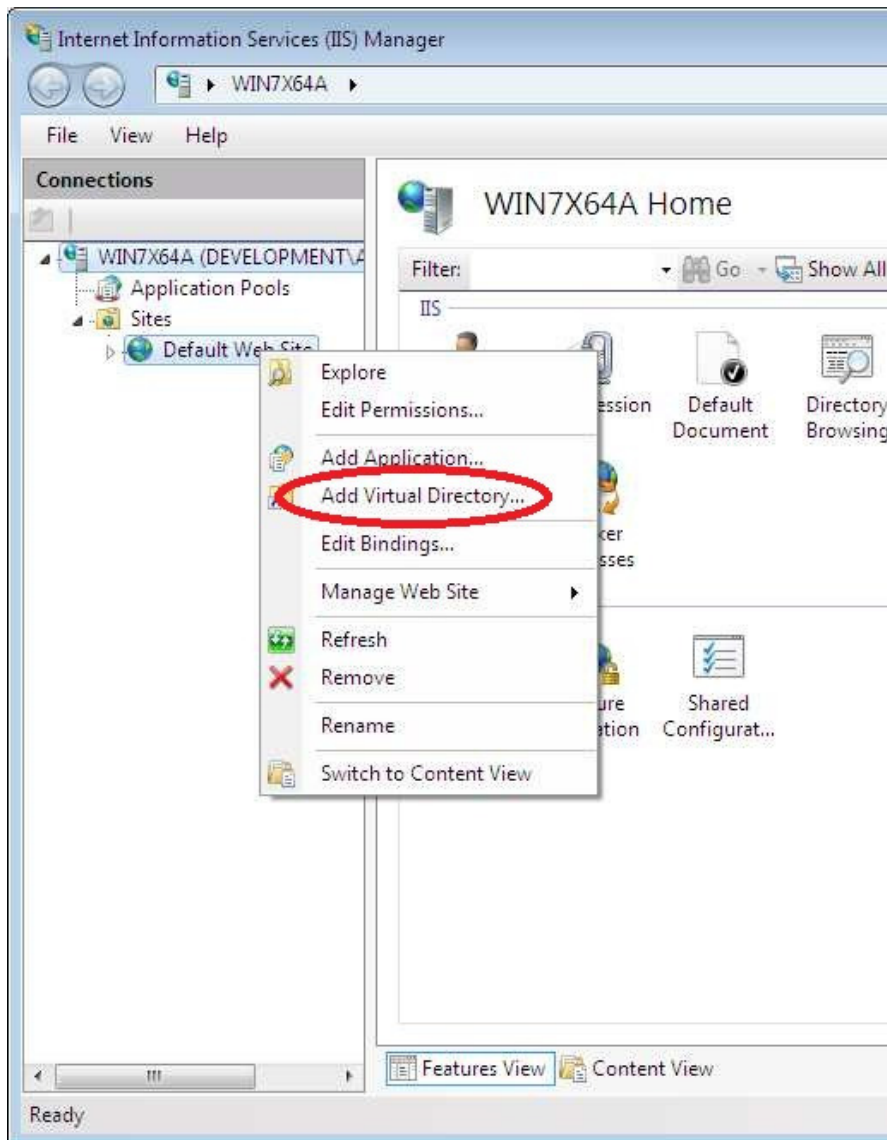
Close the device Package Loader page.



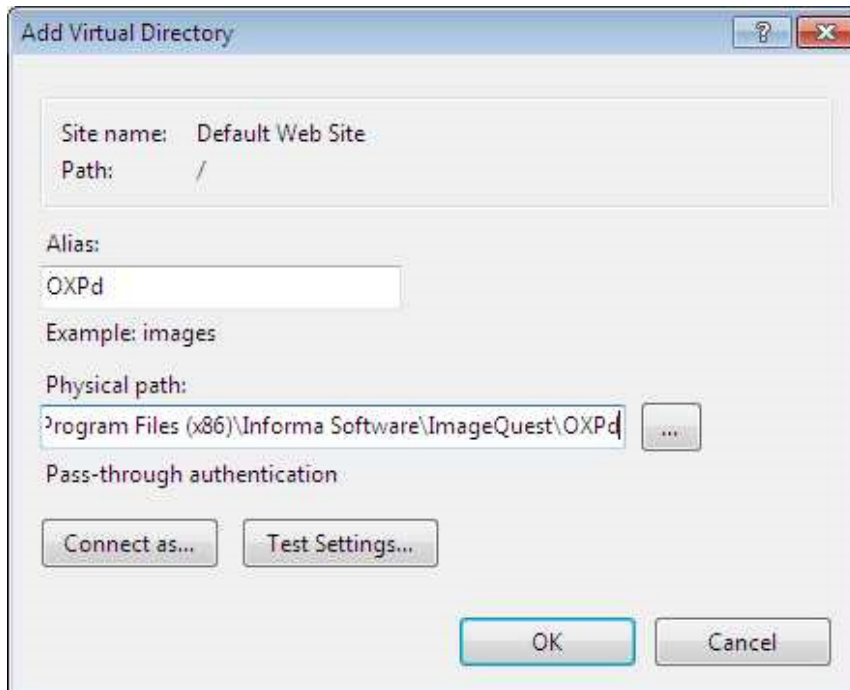
Configure IIS for OXPd

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".

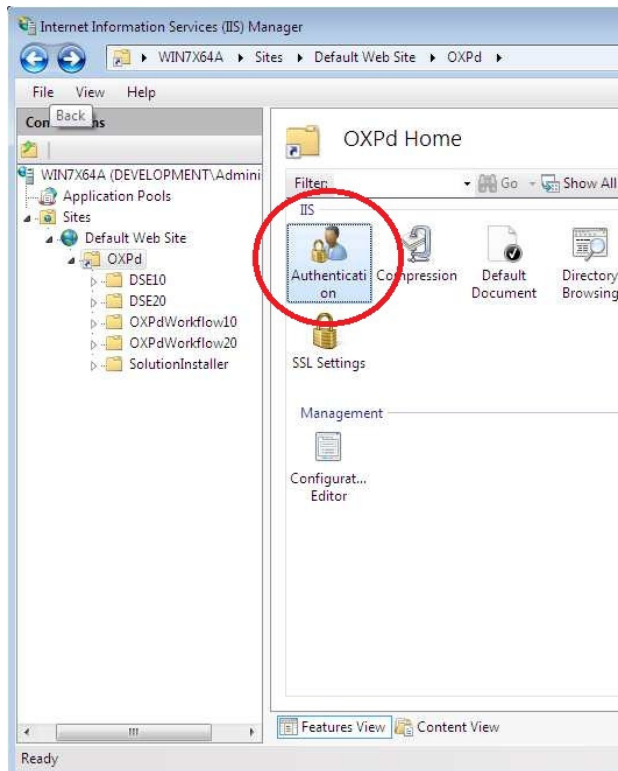


In the Add Virtual Directory dialog, type “OXPd” for the Alias and browse to and use the Informa Software\ImageQuest\OXPd directory on the ImageQuest Server for the Physical path.

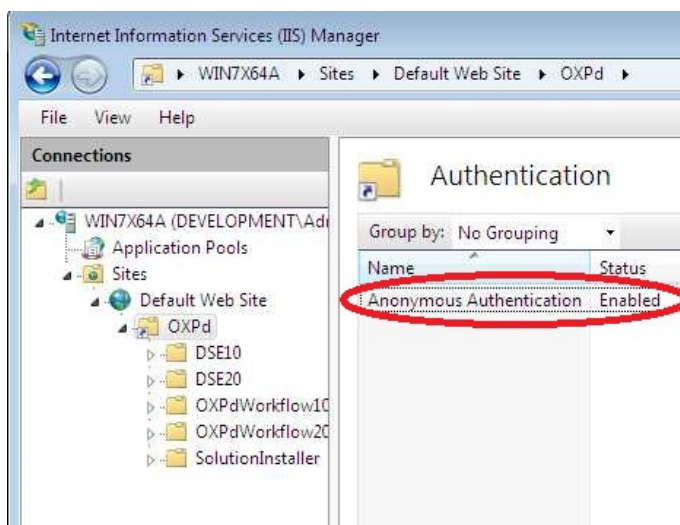


Click “OK” to close to save and add the new OXPd Virtual Directory.

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 on 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.

OXPd:SolutionInstaller

Device IP Address ☐ Remember this address (must enable cookies)

Protocol ☒ http ☐ https

Device Model

Step 1 - ChaiSOE_DSE Package

Select the below manifest file from the IQ installation directory,

Manifest

AppURL

Step 2 - OXPdWorkflow Package

Select the below manifest file from the IQ installation directory,

Manifest

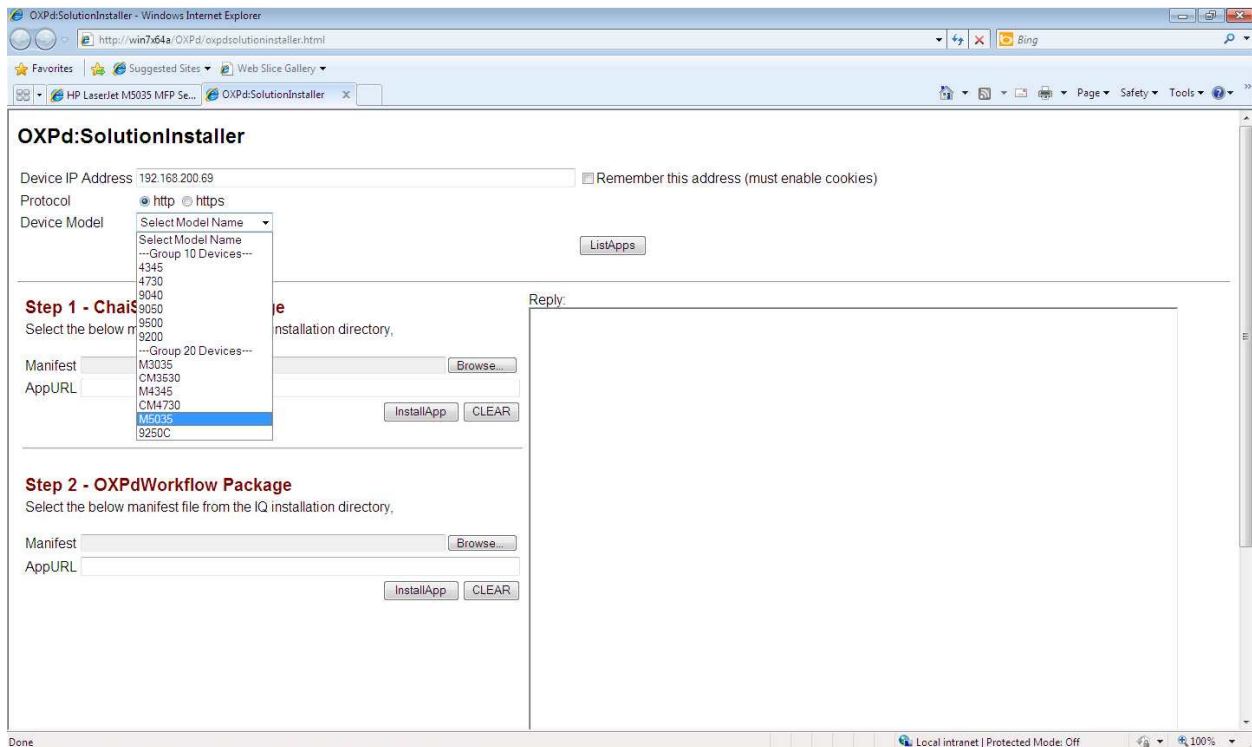
AppURL

Reply:

Done Local intranet | Protected Mode: Off

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”.

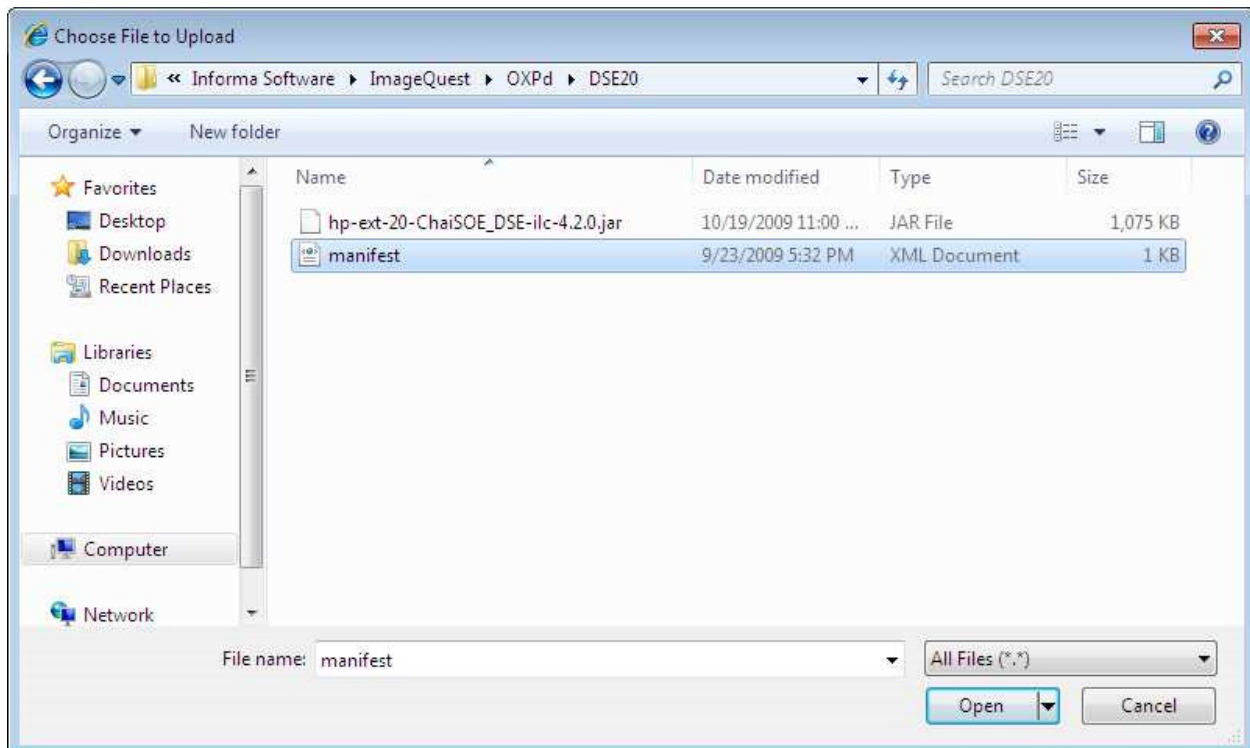
Step 1 - ChaiSOE_DSE Package

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

Manifest **Browse...**

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.

Step 1 - ChaiSOE_DSE Package

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

Manifest C:\Program Files (x86)\Informa Software\ImageQuest\XPd\DSE20\ma

AppURL http://win7x64a/XPd/DSE20/hp-ext-20-ChaiSOE_DSE-ilc-4.2.0.jar

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

XPd:SolutionInstaller - Windows Internet Explorer

http://win7x64a/XPd/oxpdsolutioninstaller.html

Device IP Address 192.168.200.69 ☐ Remember this address (must enable cookies)

Protocol ☒ http ☐ https

Device Model M3035

Step 1 - ChaiSOE_DSE Package

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

Manifest C:\Program Files (x86)\Informa Software\ImageQuest\XPd\DSE20\ma

AppURL http://win7x64a/XPd/DSE20/hp-ext-20-ChaiSOE_DSE-ilc-4.2.0.jar

Step 2 - OXPdWorkflow Package

Select the below manifest file from the IQ installation directory,
 C:\Program Files\Informa Software\ImageQuest\XPd\XPdWorkflow20\manifest.xml

Manifest

AppURL http://win7x64a/XPd/XPdWorkflow20/hp-ext-20-oxpdworkflow-ilc-1.4.8.0.jar

Reply:

202 Accepted

Done

Local intranet | Protected Mode: Off

100%

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/XPd/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>XPd: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\XPd\ OXPdWorkflow20\manifest.xml”.

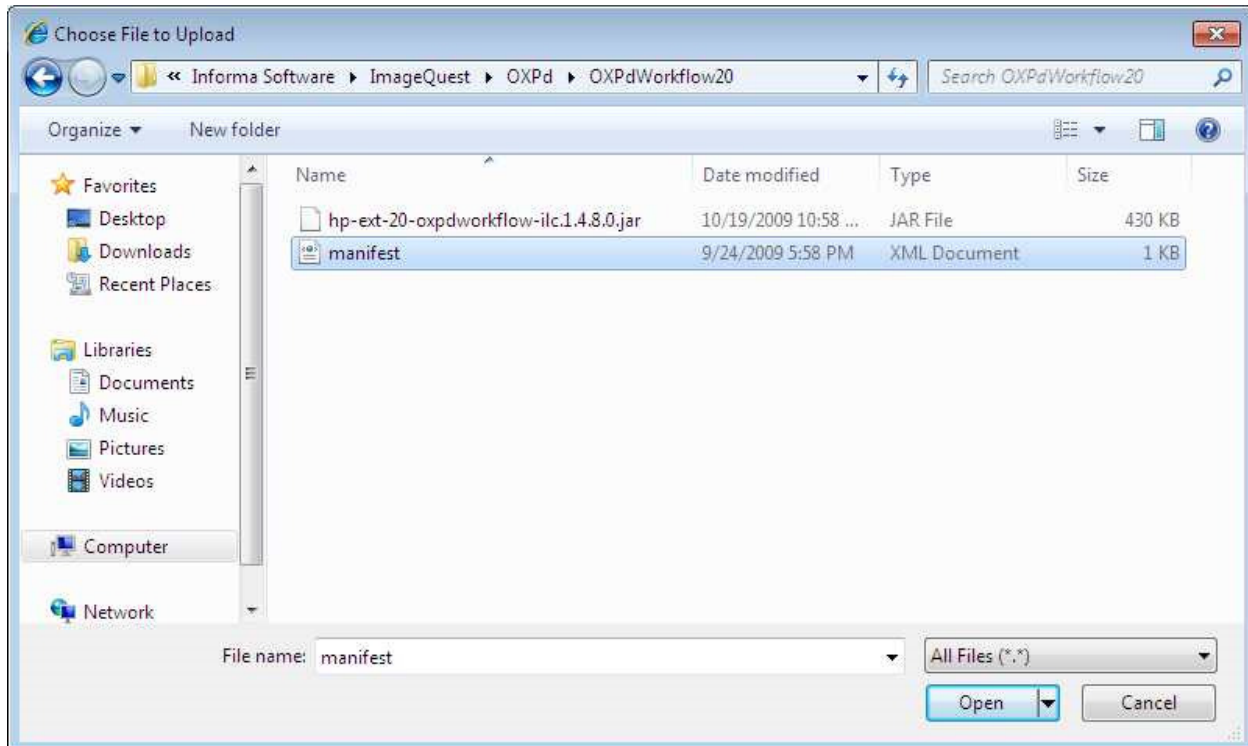
Step 2 - OXPdWorkflow Package

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

Step 2 - OXPdWorkflow Package

Select the below manifest file from the IQ installation directory,
C:\Program Files\Informa Software\ImageQuest\XPd\XPdWorkflow20\manifest.xml

Manifest C:\Program Files (x86)\Informa Software\ImageQuest\XPd\XPdWork

AppURL http://win7x64a/XPd/XPdWorkflow20/hp-ext-20-oxpdworkflow-ile.1.4.8.0.jar

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

XPdSolutionInstaller - Windows Internet Explorer

http://win7x64a/XPd/oxpsolutioninstaller.html

Forward Suggested Sites Web Slice Gallery

XPdSolutionInstaller

XPd:SolutionInstaller

Device IP Address 192.168.200.69 ☐ Remember this address (must enable cookies)

Protocol ☒ http ☐ https

Device Model M3035

Step 1 - ChaiSOE_DSE Package

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

Manifest C:\Program Files (x86)\Informa Software\ImageQuest\XPd\DSE20\ma

AppURL http://win7x64a/XPd/DSE20/hp-ext-20-ChaiSOE_DSE-ile.4.2.0.jar

Step 2 - OXPdWorkflow Package

Select the below manifest file from the IQ installation directory,
C:\Program Files\Informa Software\ImageQuest\XPd\XPdWorkflow20\manifest.xml

Manifest C:\Program Files (x86)\Informa Software\ImageQuest\XPd\XPdWork

AppURL http://win7x64a/XPd/XPdWorkflow20/hp-ext-20-oxpdworkflow-ile.1.4.8.0.jar

Reply

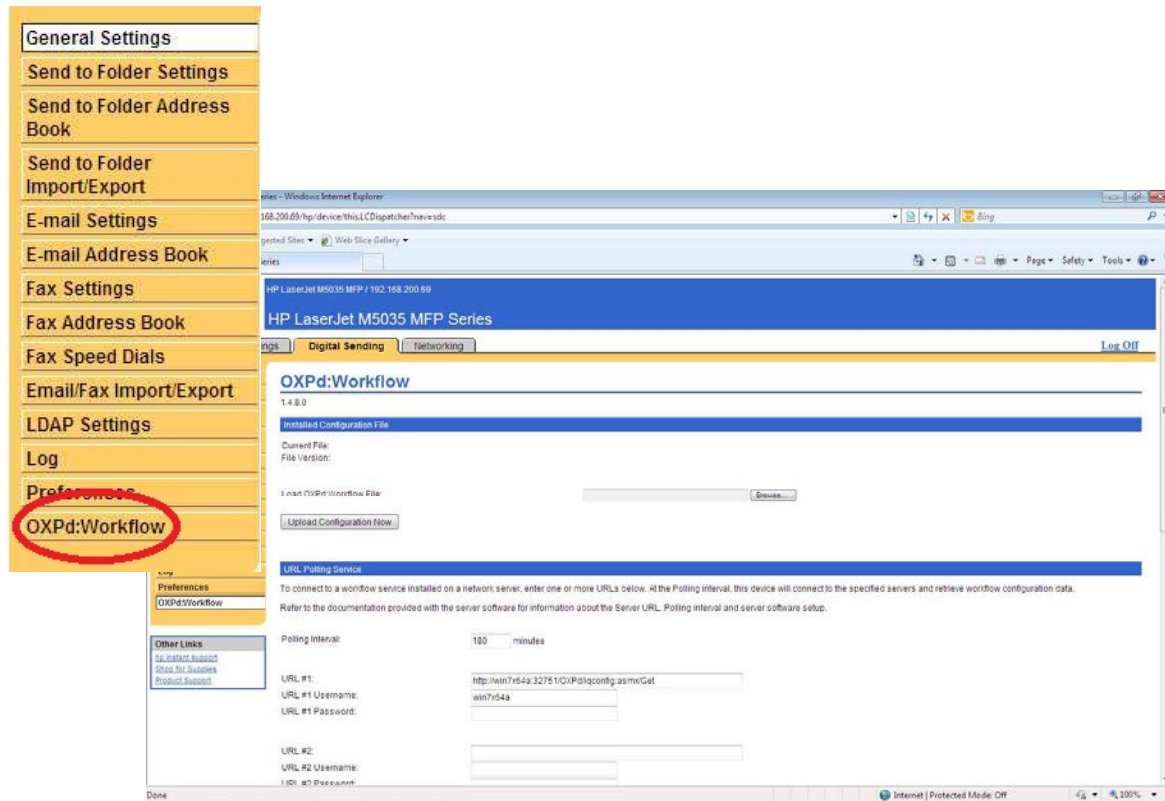
202 Accepted

Done Local intranet | Protected Mode: Off 100%

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.

Cabinet: ImageQuest IQadministrator

File

- ImageQuest
- Manage Users and Roles
- Manage Document Types
- Manage Document Groups
- Saved Queries
- Document Destruction Rules
- Destroy Deleted Documents
- OCR Settings
- Attribute Lookup Configuration
- Notification Rules
- Workflow Settings
- Workflow Definitions
- Manage File Storage
- Configure IQfolder
- Configure IQmfp (OXPd)

Configure IQmfp (OXPd)

Select Device: New Remove Save

Display Name:

Hostname/Address: ☐ Use SSL

Model Name:

Serial Number:

IQ Server:

Page Orientation
☒ Portrait ☐ Landscape

Color
☒ B & W ☐ Color

Page Size
☒ Letter ☐ Legal ☐ A4 ☐ Exec ☐ Ledger

Number of Sides
☒ Single ☐ Double

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.

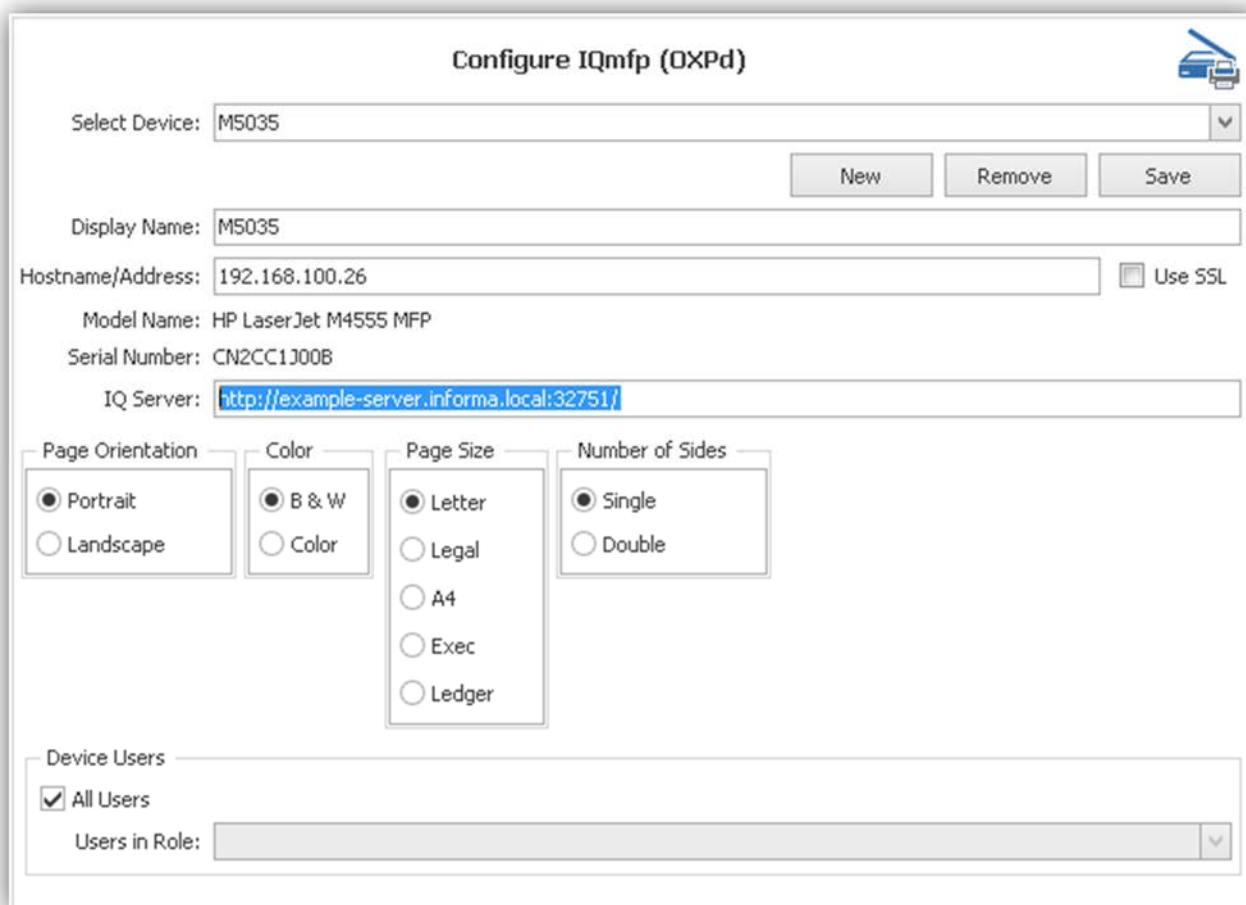
Enter the Display Name and Host Name/IP Address for the new device. In the example below, “M5035” is used for Display Name and IP address “192.168.100.26” is used for Hostname/Address. Press the Tab key to connect to the Mfp device.

The screenshot displays the 'Configure IQmfp (OXPd)' window in the ImageQuest Administrator application. The window title bar shows 'Cabinet: ImageQuest' and 'IQadministrator'. The left sidebar contains a 'File' menu and a list of configuration options: ImageQuest, Manage Users and Roles, Manage Document Types, Manage Document Groups, Saved Queries, Document Destruction Rules, Destroy Deleted Documents, OCR Settings, Attribute Lookup Configuration, Notification Rules, Workflow Settings, Workflow Definitions, Manage File Storage, Configure IQfolder, and Configure IQmfp (OXPd). The main area is titled 'Configure IQmfp (OXPd)' and contains the following fields and options:

- Select Device:** A dropdown menu showing 'M5035'. Below it are 'New', 'Remove', and 'Save' buttons.
- Display Name:** A text field containing 'M5035'.
- Hostname/Address:** A text field containing '192.168.100.26'. To its right is a checkbox labeled 'Use SSL'.
- Model Name:** A text field containing 'HP LaserJet M4555 MFP'.
- Serial Number:** A text field containing 'CN2CC1300B'.
- IQ Server:** A text field containing 'http://example-server.informa.local:32751/'.
- Page Orientation:** Radio buttons for 'Portrait' (selected) and 'Landscape'.
- Color:** Radio buttons for 'B & W' (selected) and 'Color'.
- Page Size:** Radio buttons for 'Letter' (selected), 'Legal', 'A4', 'Exec', and 'Ledger'.
- Number of Sides:** Radio buttons for 'Single' (selected) and 'Double'.
- Device Users:** A section with a checked checkbox for 'All Users' and a 'Users in Role' dropdown menu.

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.



The screenshot shows the 'Configure IQmfp (OXPd)' window. At the top right is a printer icon. The 'Select Device:' dropdown is set to 'M5035'. Below it are 'New', 'Remove', and 'Save' buttons. The 'Display Name:' field contains 'M5035'. The 'Hostname/Address:' field contains '192.168.100.26' with a 'Use SSL' checkbox to its right. The 'Model Name:' is 'HP LaserJet M4555 MFP' and the 'Serial Number:' is 'CN2CC1J00B'. The 'IQ Server:' field contains 'http://example-server.informa.local:32751/'. Below these are four grouped sections: 'Page Orientation' with 'Portrait' (selected) and 'Landscape'; 'Color' with 'B & W' (selected) and 'Color'; 'Page Size' with 'Letter' (selected), 'Legal', 'A4', 'Exec', and 'Ledger'; and 'Number of Sides' with 'Single' (selected) and 'Double'. At the bottom is the 'Device Users' section with a checked 'All Users' checkbox and a 'Users in Role:' dropdown.

Configure IQmfp (OXPd)

Select Device: M5035

New Remove Save

Display Name: M5035

Hostname/Address: 192.168.100.26 ☐ Use SSL

Model Name: HP LaserJet M4555 MFP

Serial Number: CN2CC1J00B

IQ Server: <http://example-server.informa.local: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

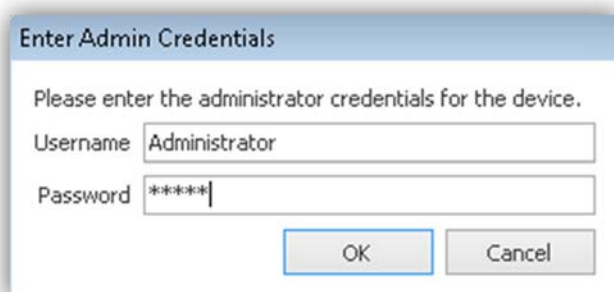
Users in Role:

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.

The screenshot displays the ImageQuest Administrator application window. The title bar shows 'Cabinet: ImageQuest' and 'IQadministrator'. The left sidebar contains a 'File' menu and a list of configuration options: ImageQuest, Manage Users and Roles, Manage Document Types, Manage Document Groups, Saved Queries, Document Destruction Rules, Destroy Deleted Documents, OCR Settings, Attribute Lookup Configuration, Notification Rules, Workflow Settings, Workflow Definitions, Manage File Storage, Configure IQfolder, and Configure IQmfp (OXPD). The main pane is titled 'Configure IQmfp (OXPD)' and contains the following fields and sections:

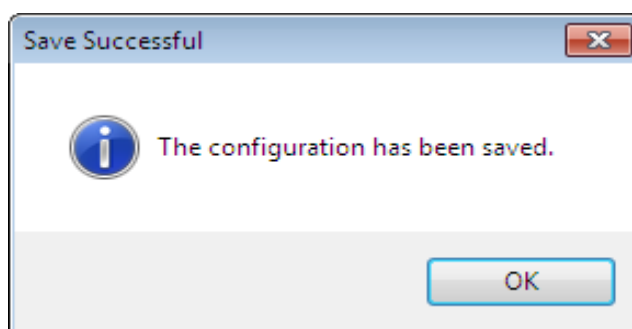
- Select Device:** A dropdown menu with 'MS035' selected. Buttons for 'New', 'Remove', and 'Save' are to the right.
- Display Name:** A text field containing 'MS035'.
- Hostname/Address:** A text field containing '192.168.100.26'. A checkbox for 'Use SSL' is to the right.
- Model Name:** A text field containing 'HP LaserJet M4555 MFP'.
- Serial Number:** A text field containing 'CN2CC1300B'.
- IQ Server:** A text field containing 'http://example-server.informa.local:32751/'.
- Page Orientation:** Radio buttons for 'Portrait' (selected) and 'Landscape'.
- Color:** Radio buttons for 'B & W' (selected) and 'Color'.
- Page Size:** Radio buttons for 'Letter' (selected), 'Legal', 'A4', 'Exec', and 'Ledger'.
- Number of Sides:** Radio buttons for 'Single' (selected) and 'Double'.
- Device Users:** A section with a checkbox for 'All Users' (unchecked). Below it is a dropdown menu labeled 'Users in Role:' with a list of roles: 'GLProcessor', 'Indexer', 'Management' (highlighted), and 'Sales'.

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.



A dialog box titled "Enter Admin Credentials" with a blue header bar. The text "Please enter the administrator credentials for the device." is displayed. Below this, there are two input fields: "Username" with the text "Administrator" and "Password" with masked characters "*****". At the bottom right, there are two buttons: "OK" and "Cancel".

The following message confirms the device was added successfully.



NOTE: See the ImageQuest 11.3 User's Guide for information on using OXPd.

Advanced Configuration

This section covers administrative topics that fall outside of *IQadministrator*. The following topics are discussed below in further detail:

- Microsoft Windows Services
- Database Configuration Utility
- Report View
- WebIQ
- Log Files

Microsoft Windows Services

The ImageQuest installation creates the following three Windows services that run in the background on the IQ Server:

- “IQApplication Service Host”
- “IQ OCR and Full Text Service”
- “IQfolder Image Importing Service”

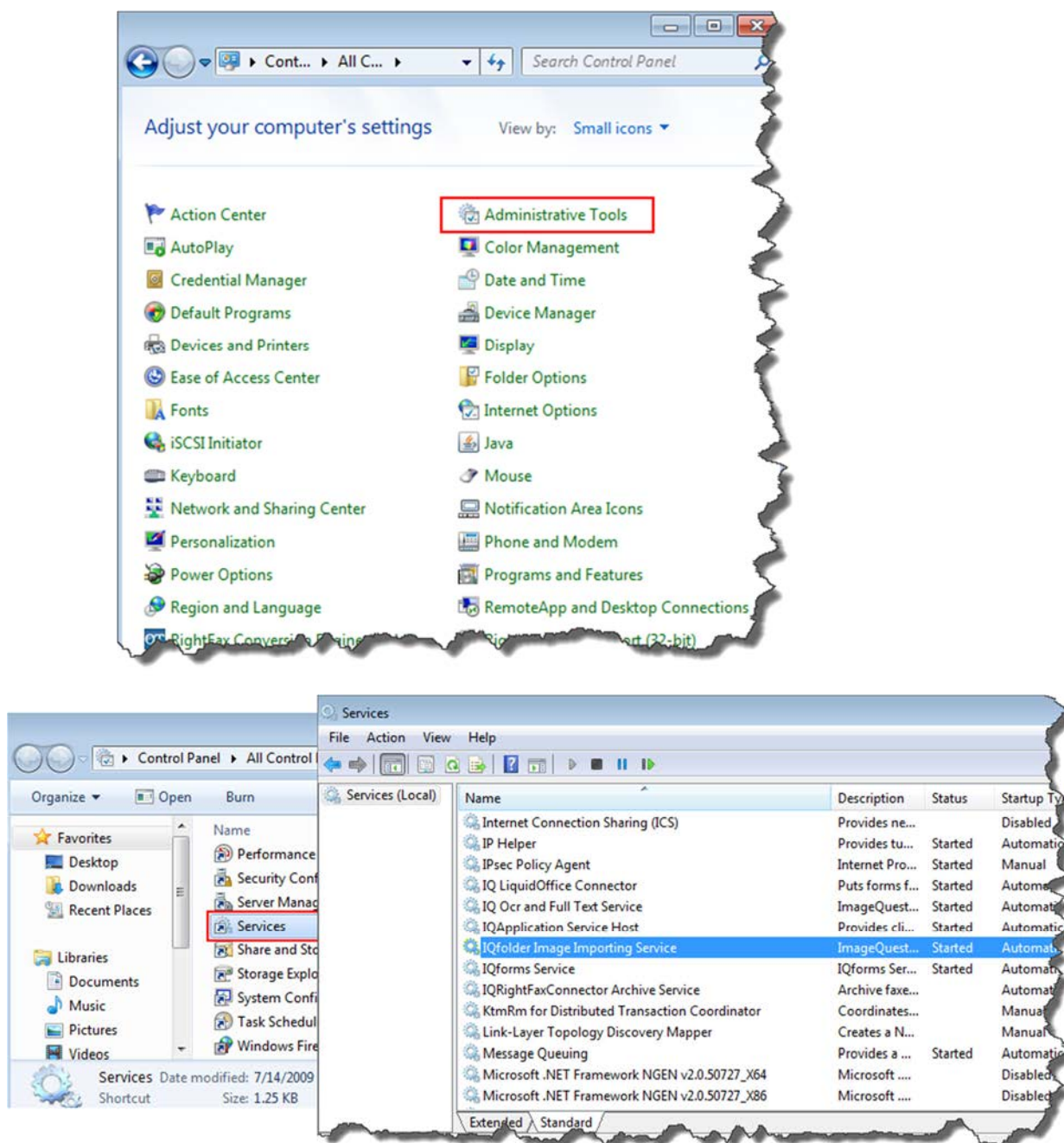
The “IQApplication Service Host” is required for the client applications to connect to the **IQ Server**. If this service is not running, all IQ client applications will fail to launch. The other two services depend on this service as well and will stop if it's not running. There is nothing to configure with this service.

Note: If your File Storage (images) for ImageQuest are located on a network share or location NOT local to the IQ Server, you will need to change the “IQ Application Service” Log on as account with an account that has read/write access to that share.

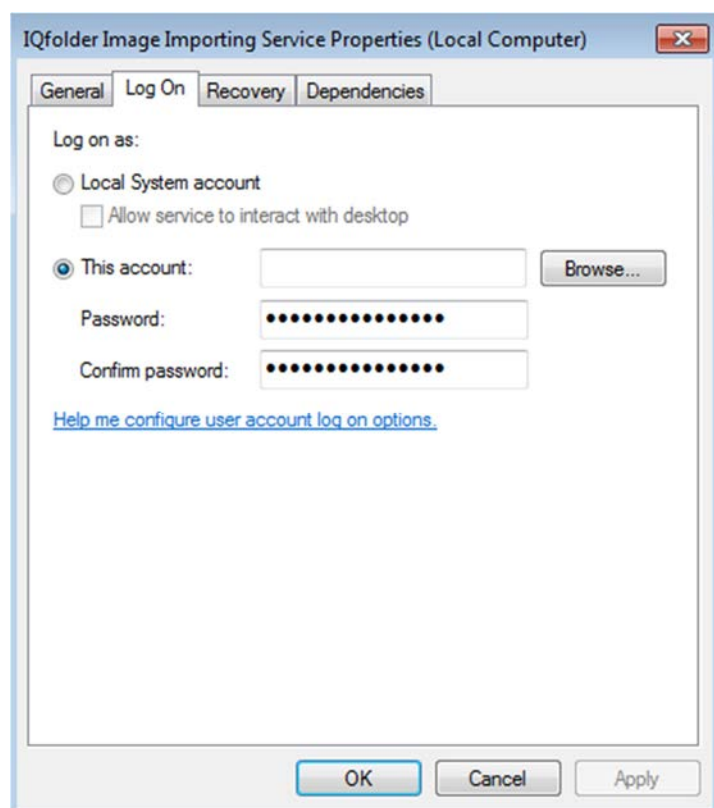
The “IQ OCR and Full Text Service” is responsible for performing “IQ Smart Indexing” OCR on .TIF files in the Indexing Queue to allow quick “click and drag” indexing in the document Indexer. It is also responsible for extracting text from indexed documents and storing it in the database for keyword searching. In the case of indexed .TIF files, the file is converted to a searchable PDF after the OCR process is complete. Other common file types submitted using the other IQ client applications may be text extracted as well to allow for keyword searching, but the file type is not converted and remains in its native format. This service is dependent on the “IQApplication Service Host”; there is nothing to configure for this service.

The “IQfolder Image Importing Service” polls all of the folders setup in *IQadministrator* at 60 second intervals and moves .tif and .pdf files into the Indexing Queue in IQdesktop as an MFP Scan document type by default. This service is dependent on the “IQApplication Service Host”. By default, IQfolder is configured to look at folders on the **IQ Server** only. If folders are created on a network share, the IQfolder service will need to be configured with domain credentials.

To configure the service to use domain credentials, open the Microsoft Windows Services application; go to Start > Control Panel > Administrative Tools > Services. Locate and double-click the **IQfolder Image Importing Service** as shown below and on the following page.



Click the “Log On” tab, select “This account” and enter a username and a password. The user specified here must have access to read and modify **ALL** folders created in IQfolder. Click “OK”.

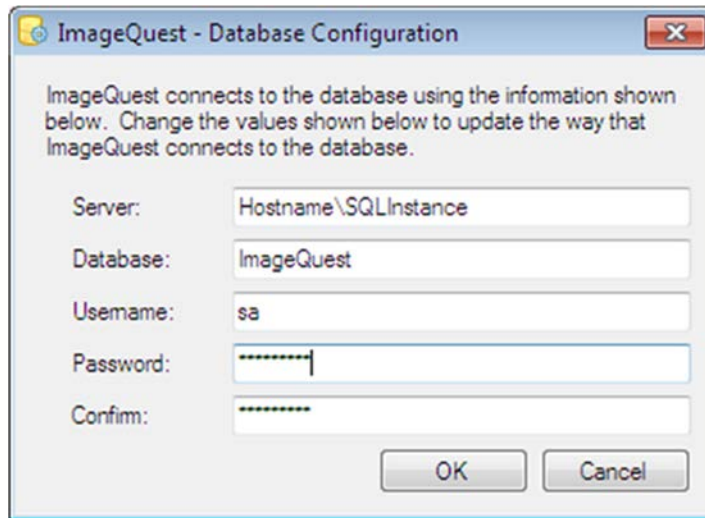


Restart the IQfolder service in order for the changes to take effect.

Note: If the IQfolder Image Importing Service is unable to delete a .TIF file from the directory, the service will be stopped and an entry will be logged to the IQfolder service log file (see section for Logfiles).

Database Configuration Utility

The Database Configuration Utility is included on the ImageQuest server and 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 utility can be found in the Service directory of the ImageQuest installation usually at *C:\Program Files (x86)\Informa Software\ImageQuest\Service* and it's called *Informa.ImageQuest.DatabaseConfiguration*.



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

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.

WebIQ

Before configuring WebIQ in Web Server (IIS), please confirm the following IIS features have been installed:

Common HTTP Features

- Static Content
- Default Document
- Directory Browsing
- HTTP Errors

Application Development

- ASP.NET
- .NET Extensibility
- ISAPI Extensions
- ISAPI Filters

Health and Diagnostics

- HTTP Logging
- Request Monitor

Security

- Windows Authentication
- Request Filtering

Performance

- Static Content Filtering

Management Tools

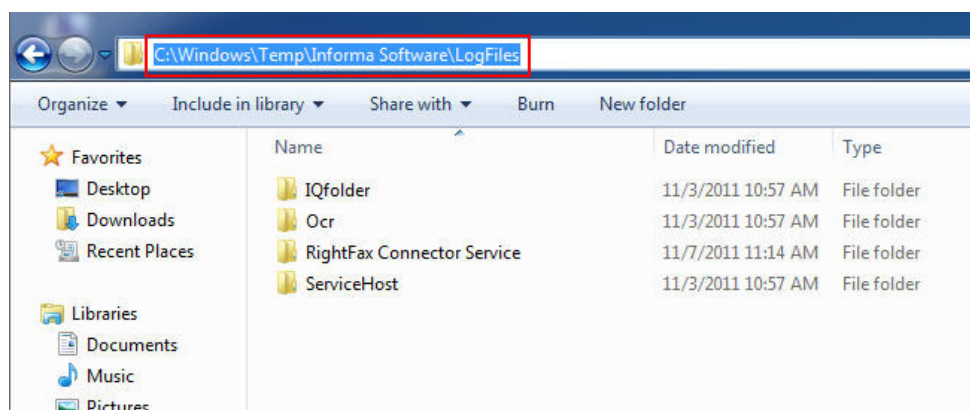
- IIS Management Console

To configure WebIQ, please follow these steps:

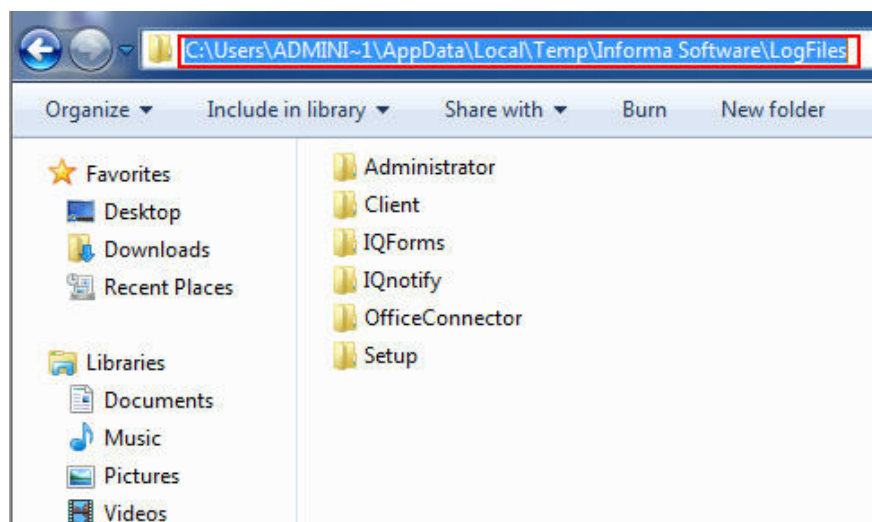
- 1) Open Server Manager>Roles>Web Server (IIS)>IIS Manager
- 2) Expand the server name tree
- 3) Expand Sites
- 4) Select Application Pools
- 5) Right click and select 'Add Application Pool'. Type 'ImageQuest' and Select '.NET Framework v4.0' and click 'OK'
- 6) In the right pane, click 'Set Application Pool Defaults' and set 'Enable 32-bit Applications' to True. Click 'OK'
- 7) Right click on Default Web Site and select "Add Application"
- 8) In the Alias box, type "WebIQ"
- 9) Click "Select" to change the Application pool to "ImageQuest" and click "OK"
- 10) Click the ellipses next to the "Physical path" box and browse to C:\Program Files (x86)\Informa Software\ImageQuest\WebIQ and click "OK". WebIQ should now be listed under Default Website
- 11) Select WebIQ
- 12) In the WebIQ Home section on the right, double click "Authentication"
- 13) Make sure that "Anonymous Authentication" is Disabled (if on a workgroup environment, leave this Enabled)
- 14) Enable "ASP.Net Impersonation", "Forms Authentication: and "Windows Authentication"
- 15) Highlight Windows Authentication, click Providers in the right pane and verify NTLM is first on the list.
- 16) Make sure that the status of ASP.Net version 4.0.30319 (32-bit) is set to "Allowed" in the Web Service Extensions or ISAPI and CGI Restrictions in IIS Manager.
- 17) If a firewall is enabled on the IQ server, make sure port 80 is open
- 18) From the ImageQuest server, browse to <http://localhost/webiq/default.aspx> and confirm the WebIQ homepage is accessible

Log Files

By default, the IQ service logs (IQ Application, IQFolder, IQocr, ServiceHost, etc) and Add-on logs are located here on the IQ Server: *C:\WINDOWS\Temp\Informa Software\Logfiles*.



The IQ client logs are stored in the following location on the client machines: *%temp%\Informa Software\LogFiles*.



Note: The AppData folder is a protected operating system folder and is hidden by default.



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