# ImageQuest

# User's Guide

**Version 11.0**

QLS SOLUTIONS GROUP

informa software

## Copyright Information



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| Title | ImageQuest User's Guide |
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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:

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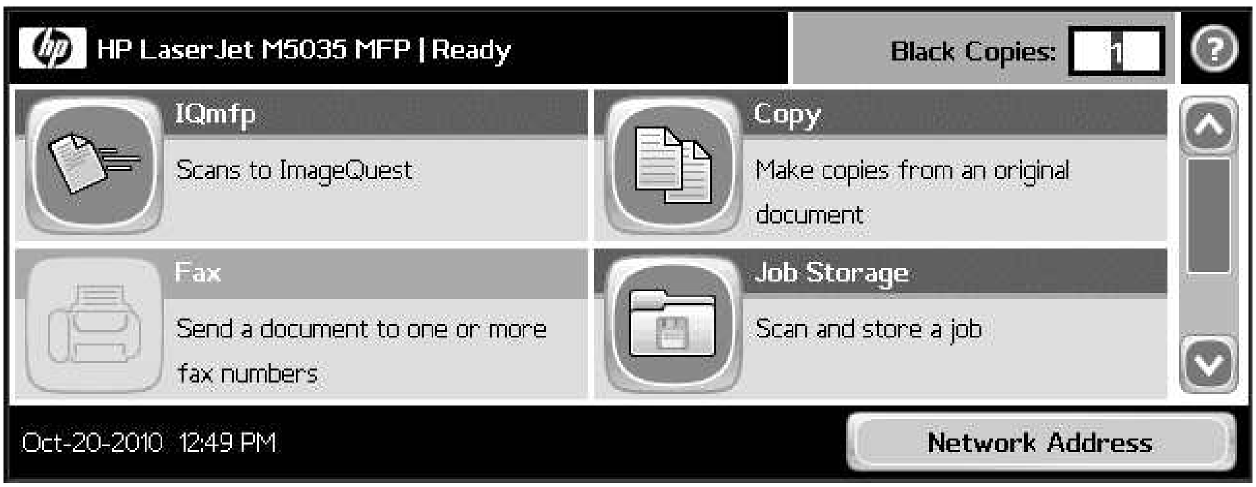
Website: http://www.informasoftware.com

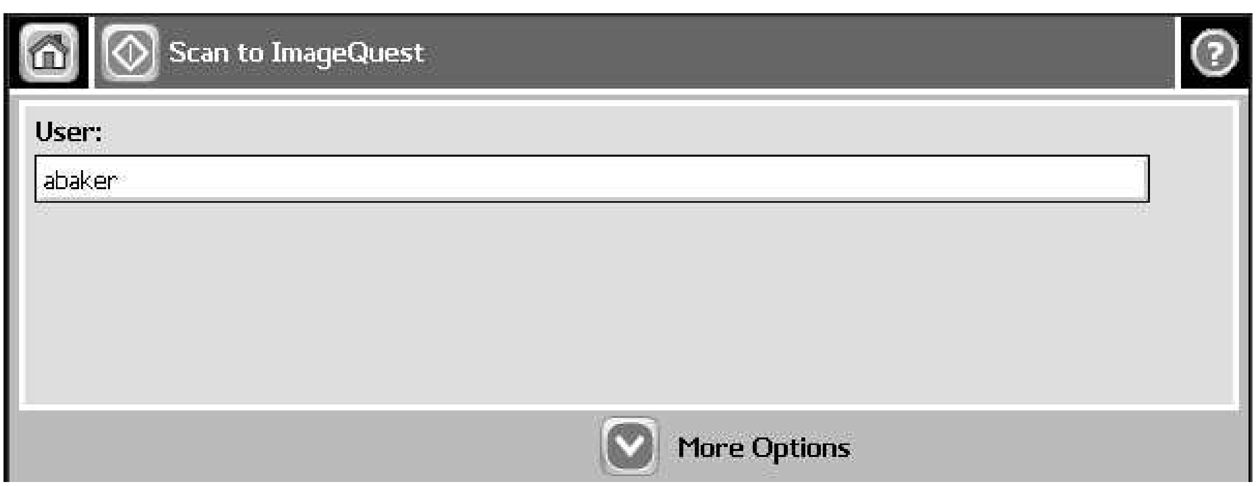
# Scanning with ImageQuest (OXPd)

ImageQuest integrates with many different models of Hewlett Packard MFP devices by publishing a button on the front panel of the device which allows users to easily scan documents into ImageQuest. These documents are sent into a user's Indexing Queue where they are then manually indexed and saved. See the *ImageQuest Administrator's Guide* for a complete list of supported devices and for instructions on how to configure this feature.

To scan with ImageQuest (OXPd), select the IQmfp button on the front panel of the device:



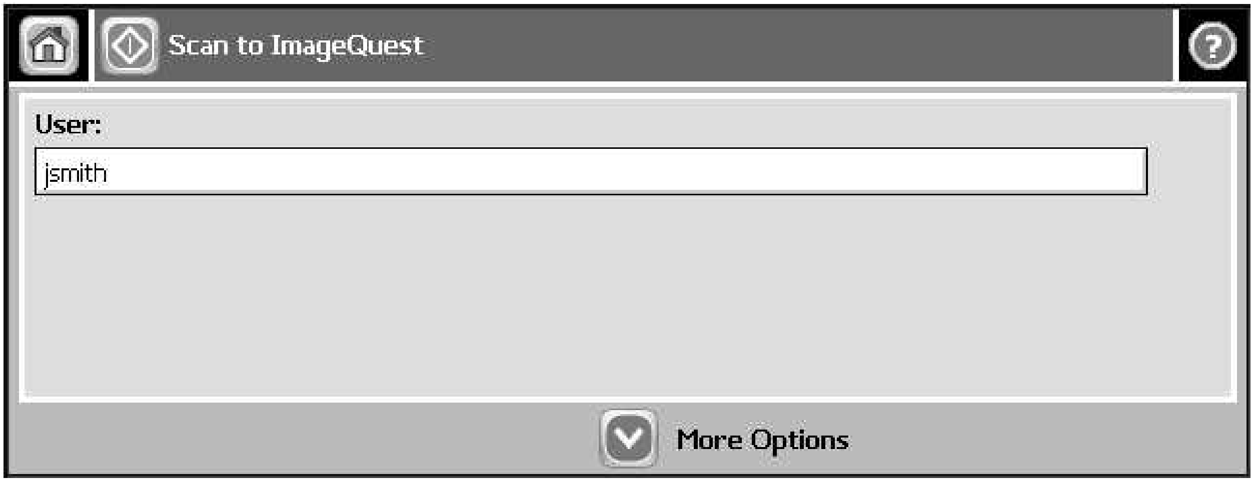

The next screen will allow you to select an ImageQuest user who will need to manually index this document.



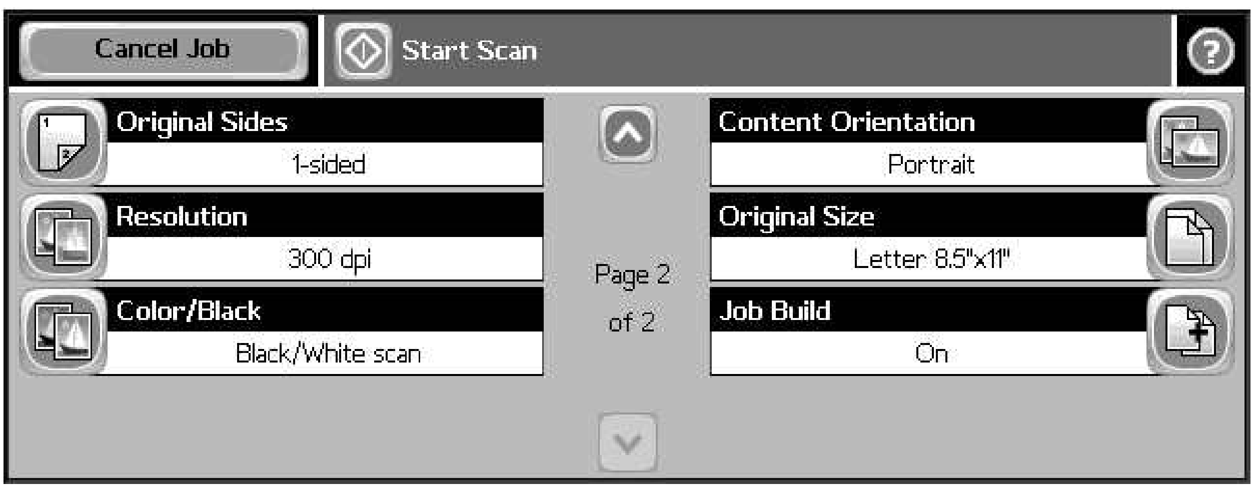
Select another user by touching the box where you see the name:


For example, if "abaker" is not the user you want, touch another name to select a different user:

The screen should then change to reflect the new username:




You can also select various options in the "More Options" section prior to scanning. The default options are shown here:




Notice that the "Job Build" option is on by default. This feature allows you to scan multiple batches and combine them into one batch.

After pressing "Start Scan", the following screen will appear:


Once the scan is complete, the screen will prompt you for further actions:


You can press "Finish" to send the batch to IQ or "Scan" to scan more pages.

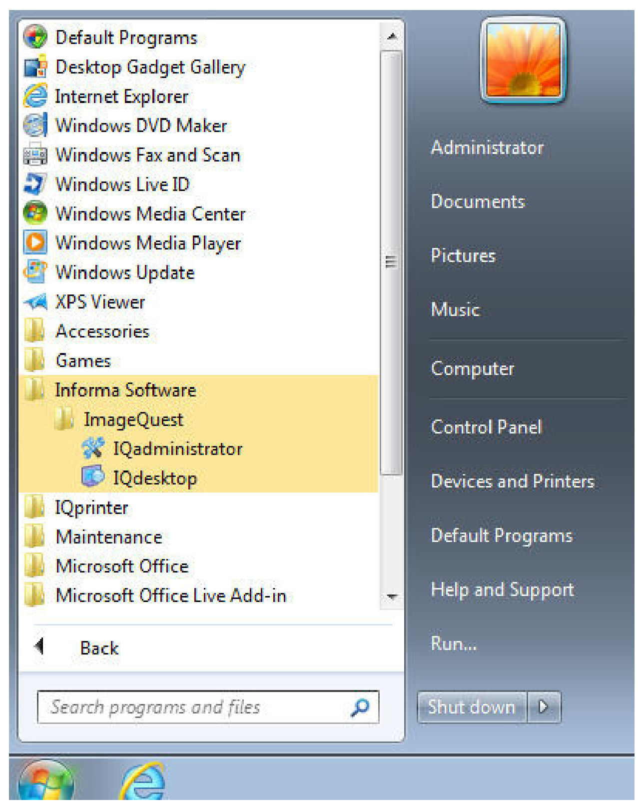
# IQdesktop

IQdesktop is the primary ImageQuest component – installed as a Windows application - used to store and retrieve documents. IQdesktop provides all of the features necessary for document indexing and retrieval and also includes advanced features such as document routing, document revisioning, complete document history, adding and viewing notes, exporting to folder, etc.

In addition to basic searching, full-text search is an included component of IQdesktop. Most common Windows file types such as .txt, .doc, .pdf, and .xls documents that are indexed will be available for Full-Text Search.

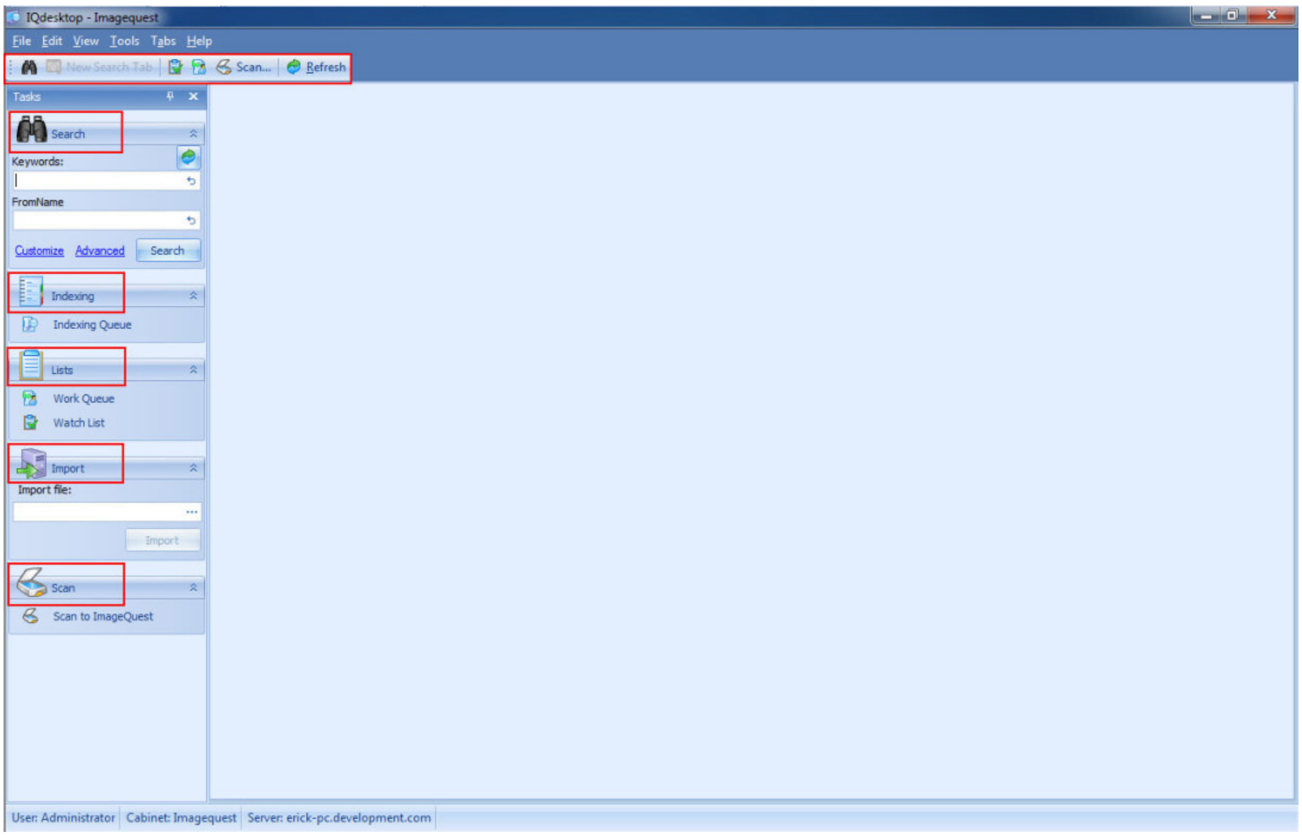
## Launching IQdesktop

Once the user has scanned documents into ImageQuest, the user is ready to launch IQdesktop as shown below. Go to Start > All Programs > Informa Software > ImageQuest and click IQdesktop.



**<u>Note</u>: If an IQ user has Single Sign-On enabled and is logged into the PC, they will be automatically logged into IQdesktop. Otherwise, they will need to provide a username and password in order to access ImageQuest.**

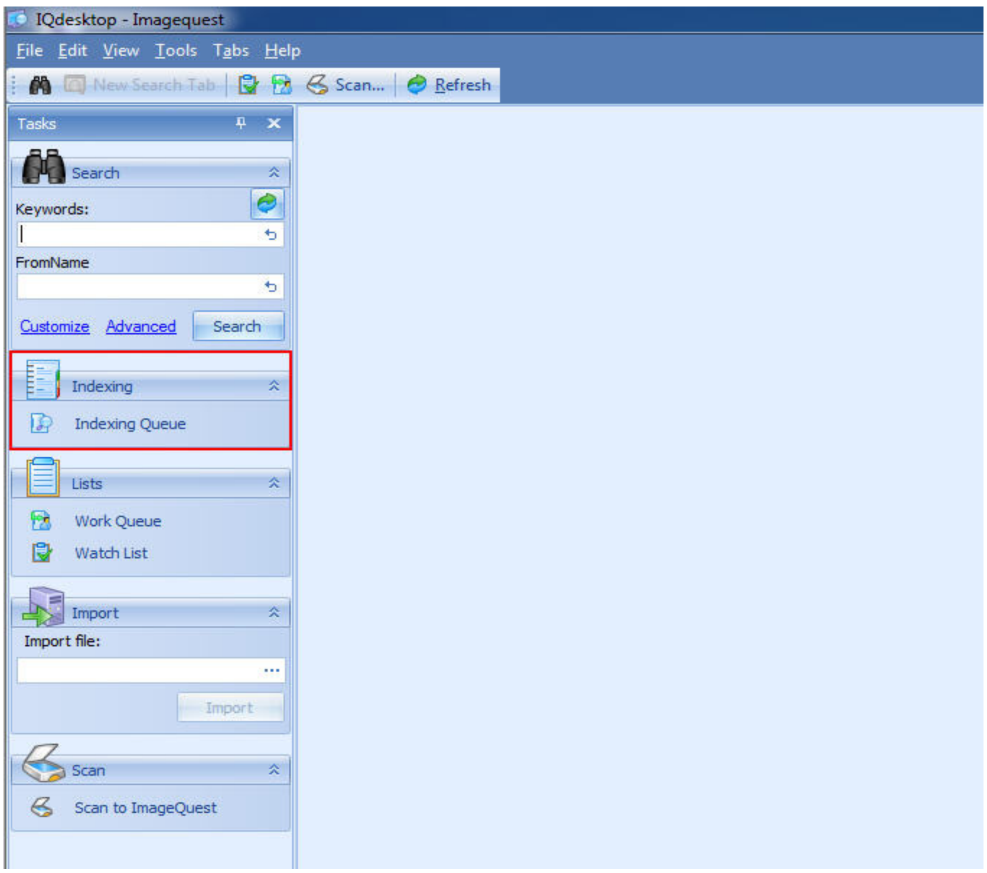
The screenshot below shows the default layout of IQdesktop's major features: "Toolbar", "Search", "Indexing", "Lists" and "Import" and "Scan".



## Indexing Queue

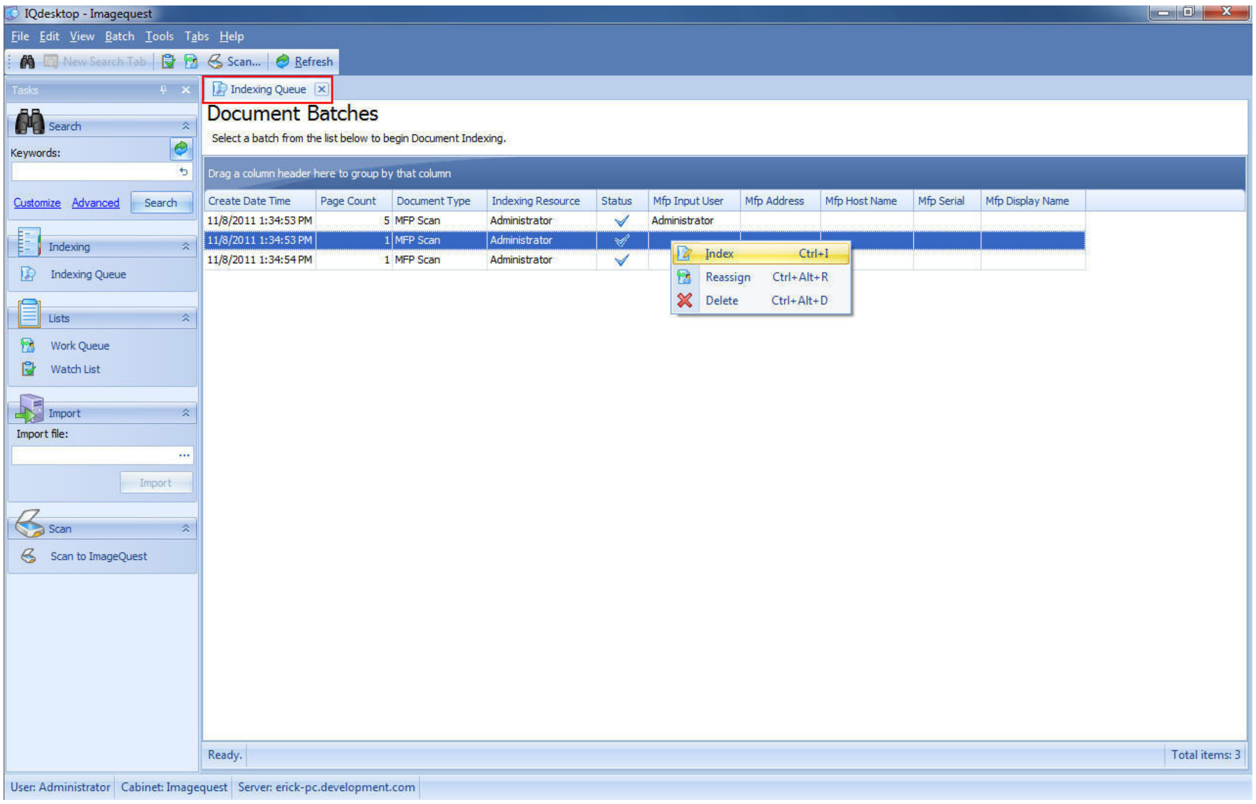
The Indexing Queue found in IQdesktop is the end-user's tool to classify and index documents within a scanned batch and export the images and their index values to the Cabinet; it also allows users to reassign document batches to other users or roles.

To view the Document Indexing screen, locate the "Indexing" section on the Tasks panel and click "Indexing Queue" as highlighted below.



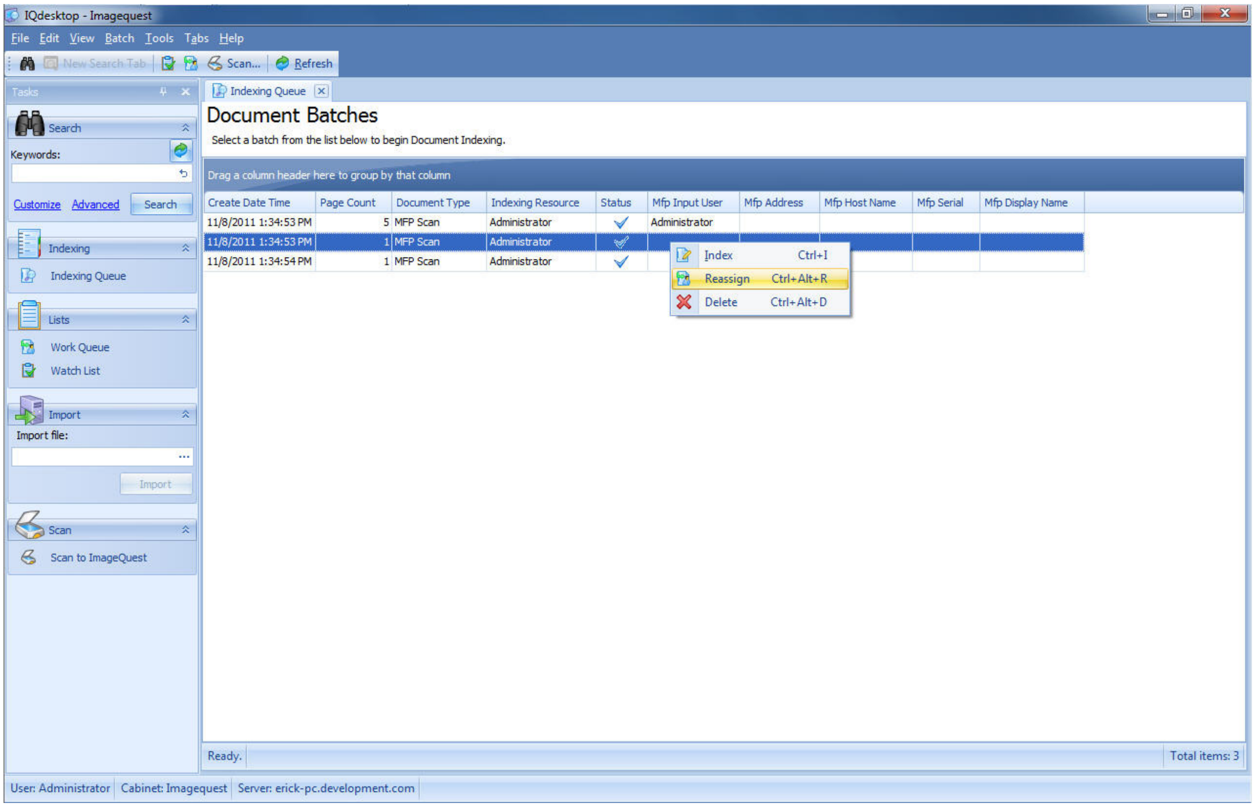

**<u>Note</u>: The "Add Document" permission is required to allow users to add a document for indexing. See the *ImageQuest Administrator's Guide 11.0: Manage Users and Roles* for information on this feature.**

The Indexing Queue shows all available document batches for the user logged into IQdesktop as illustrated below. Document batches may be indexed, deleted or reassigned to another user or role.

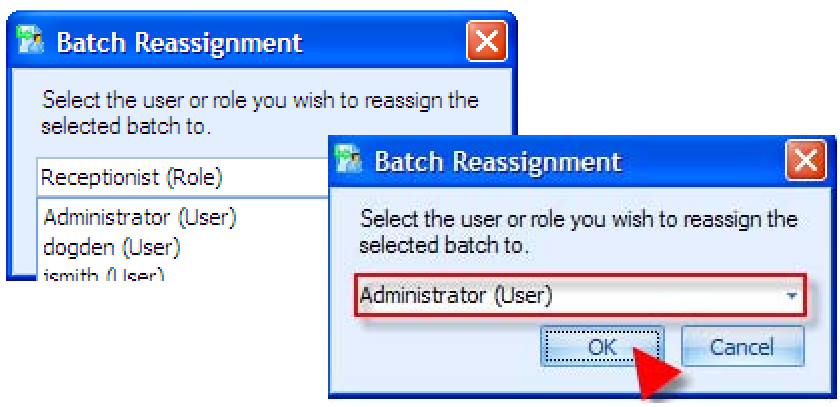



The **Index** feature allows users to save documents in ImageQuest and establish their search criteria with their corresponding attributes to effectively and efficiently locate those documents. To index a batch, highlight the batch and select **Index** from the "Batch" menu or right-click the batch and select **Index**.

To reassign a batch to another user or role, highlight the batch and select **Reassign** from the "Batch" menu, or right-click the batch and select **Reassign**; to reassign all batches, press **Ctrl+A** to select all and then select **Reassign**. The **Ctrl** key can also be used to select multiple batches.

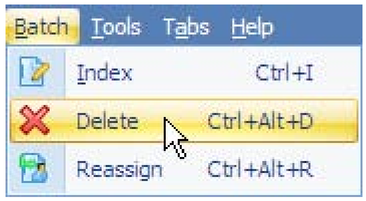


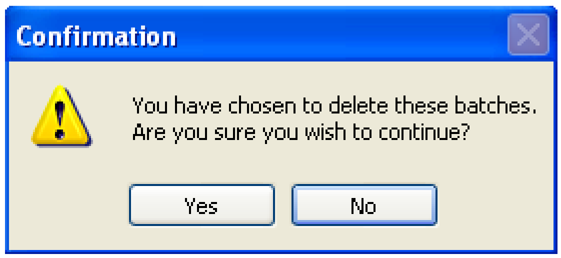

In the "Batch Reassignment" window below, use the drop-down menu to select the user or role to reassign the selected batch to as demonstrated and click "OK".




By reassigning the batch to a role, every member in that role has access to the document batch in their Indexing Queue. By reassigning to a user, only that specific user has access to the document batch. Once a user opens a batch, it will be locked for exclusive use for thirty minutes. If the indexing process takes longer than this, the lock will be expired and the batch will once again become available for indexing to other users in that role. Once a batch is indexed by a user, it is no longer available for indexing by any other user.

To delete a batch from the Indexing Queue, right-click on the highlighted batch and select **Delete,** or highlight the applicable batch(es) and select **Delete** from the Batch menu as demonstrated below**.** The user will be prompted with a confirmation window.



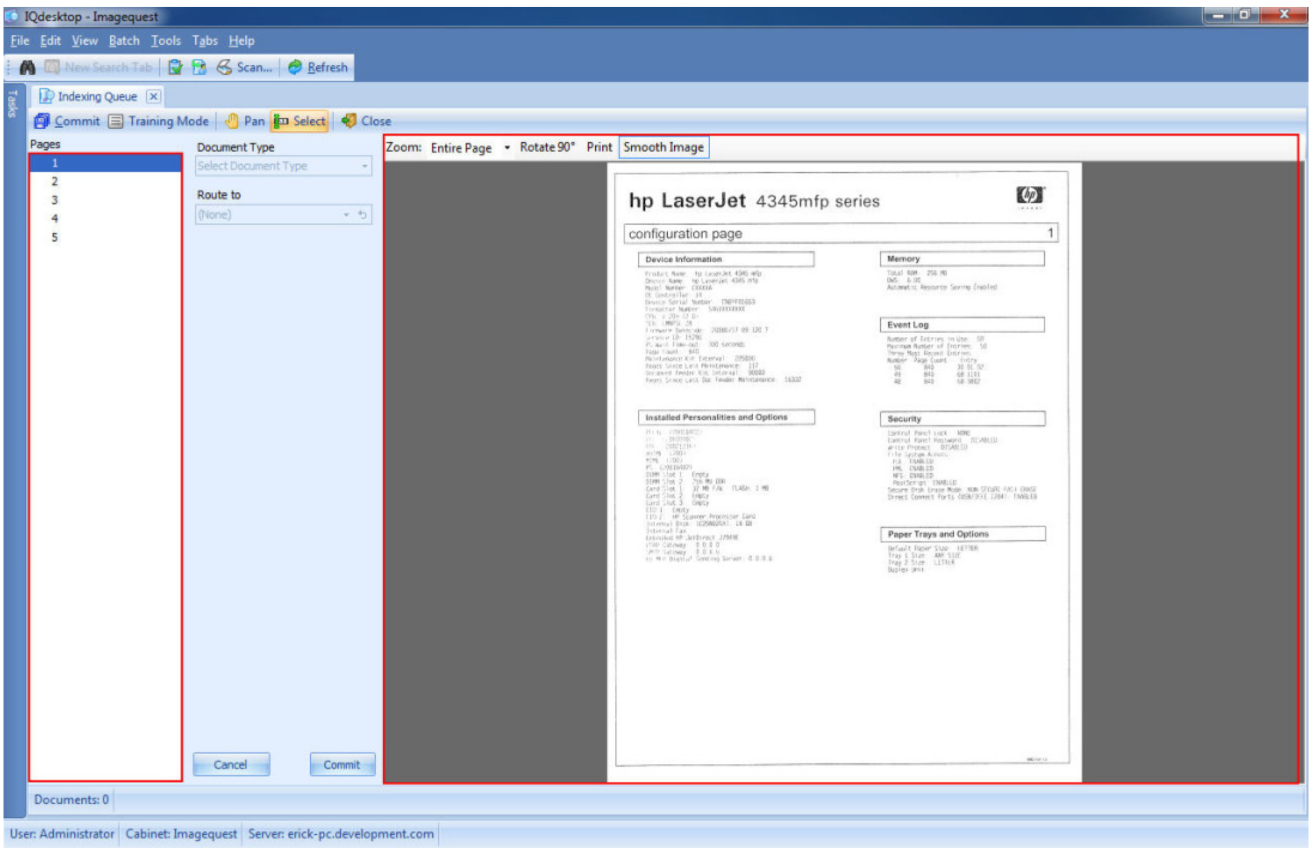

**<u>Note</u>: The "Delete Batch" permission is required to delete a batch from the Indexing Queue.**

## Indexing and Committing Batches

Document batches are "time-stamped" with the specific time they were scanned. To choose one of the batches to index, double-click it to open the main Indexer screen.

**Note: Multiple batch selection is NOT available when indexing; only one batch can be indexed at a time.**

The Indexer screen allows a user to view the individual pages of the batch and designate pages as the beginning of documents for indexing. See below to locate the "**Pages**" and the "**Document Window**" to "**Zoom**", "**Rotate**", "**Print**" or "**Smooth**" the document image.

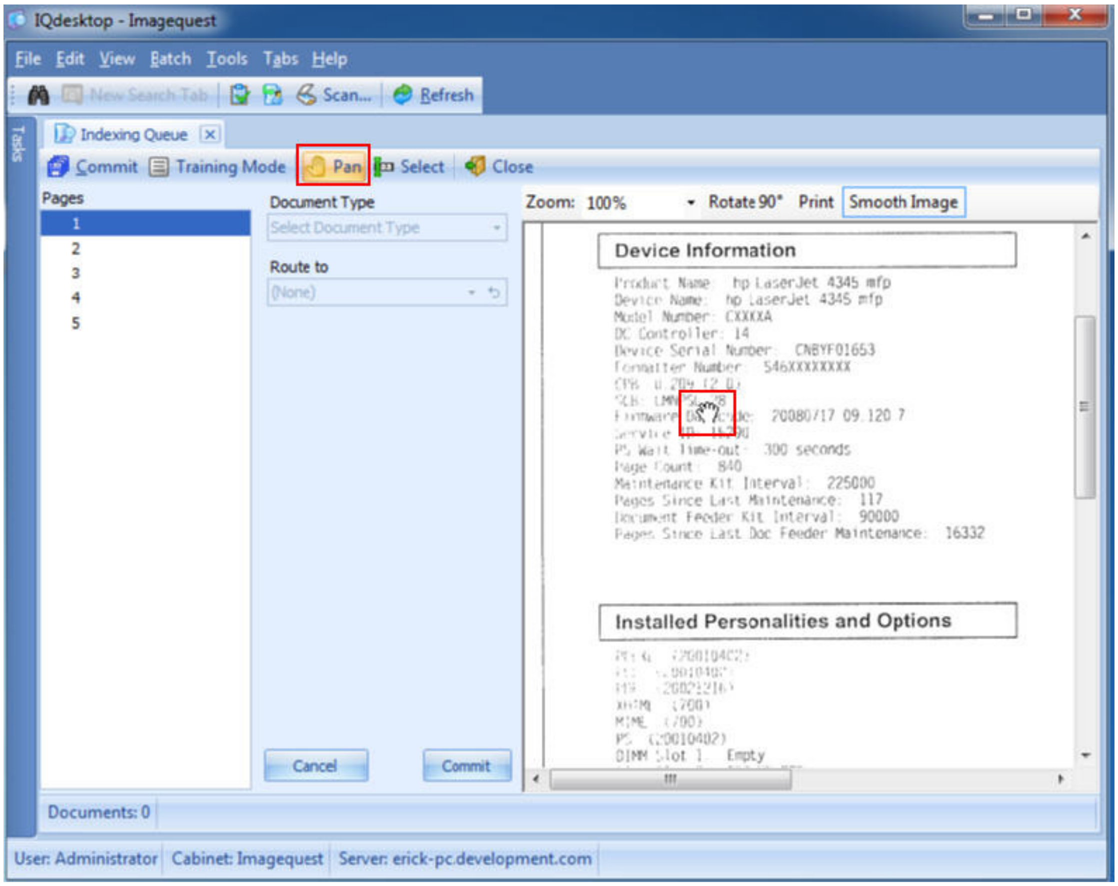



The "**Pages**" pane allows the user to click each page number to view each scanned page.

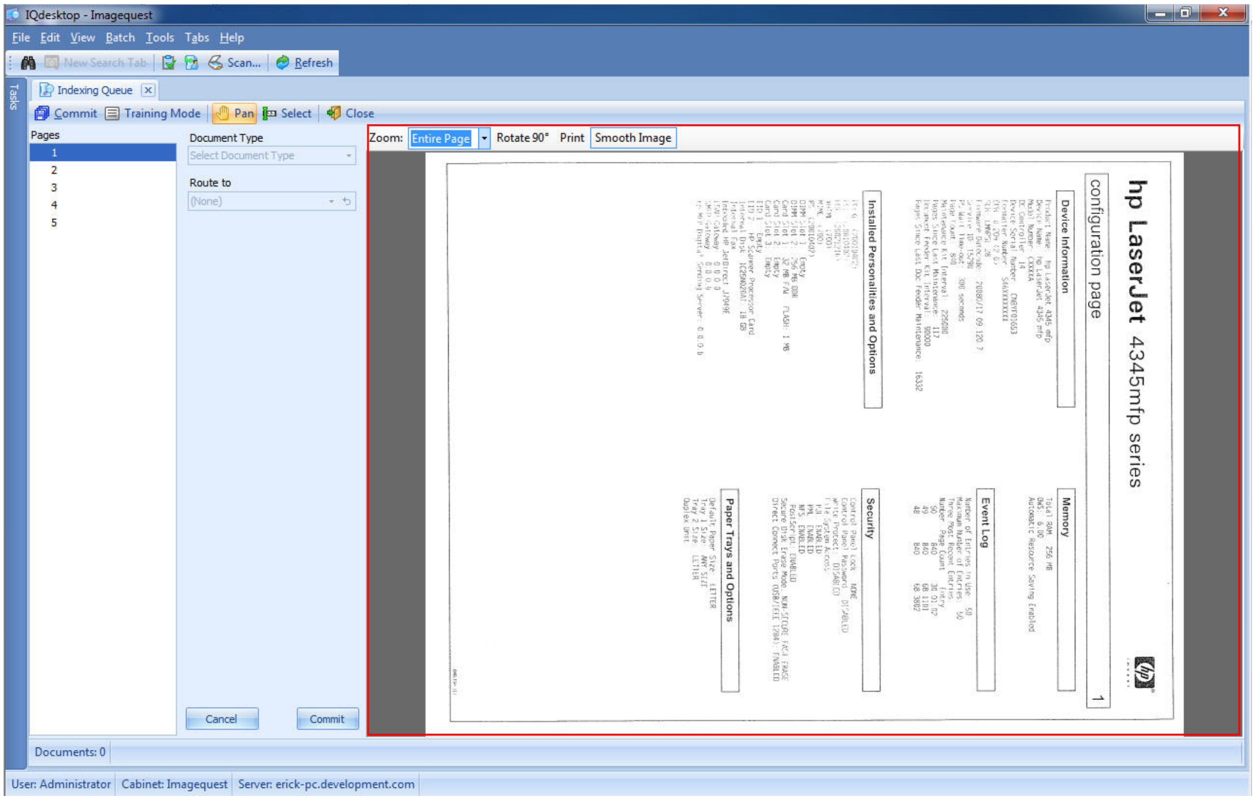
The "**Smooth Image**" button is on by default for better image quality, but may be disabled in order to increase performance.

To make the image larger or smaller in the document window, click and select a size from the "**Zoom**" drop down menu as displayed on the following page.

The "**Pan**" feature, as shown below, gives the user the ability to navigate an image when the zoom function is used and only part of the image can be viewed. When enabled from the toolbar, the user can use the cursor to move across the document to find the information they are looking for.



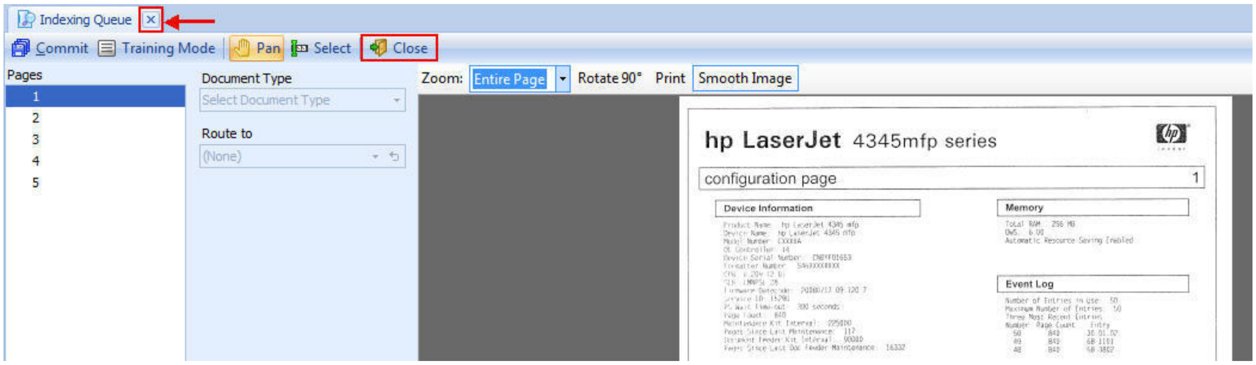
Click the **Rotate 90°** button to rotate the image as displayed on the following page.  This rotation will persist when the page is saved in ImageQuest.



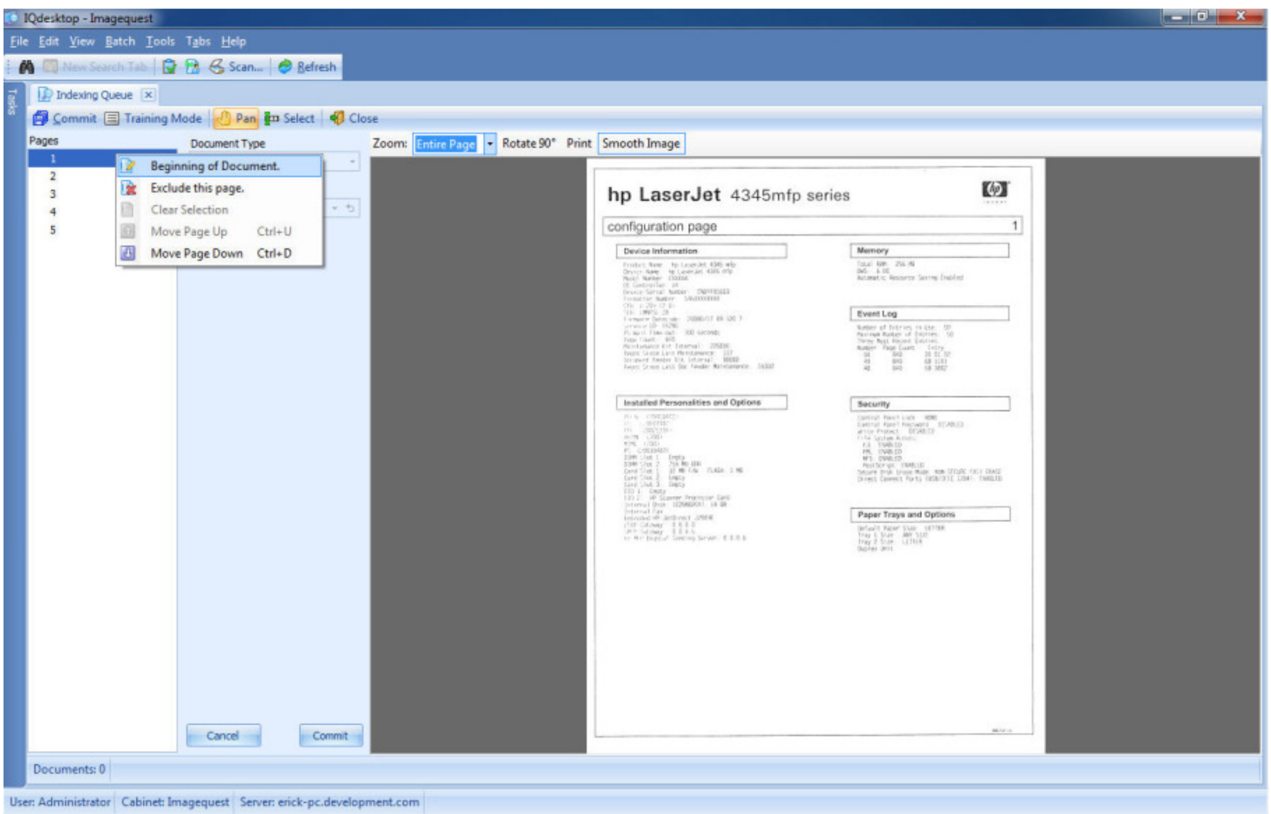

**<u>Note</u>:  If Full-Text OCR is enabled, it is possible for a manually rotated page to be orientated so that the text is readable by the OCR engine.**

The “Select” feature is a tool of the IQ Smart Indexer process and will be explained later in this document.

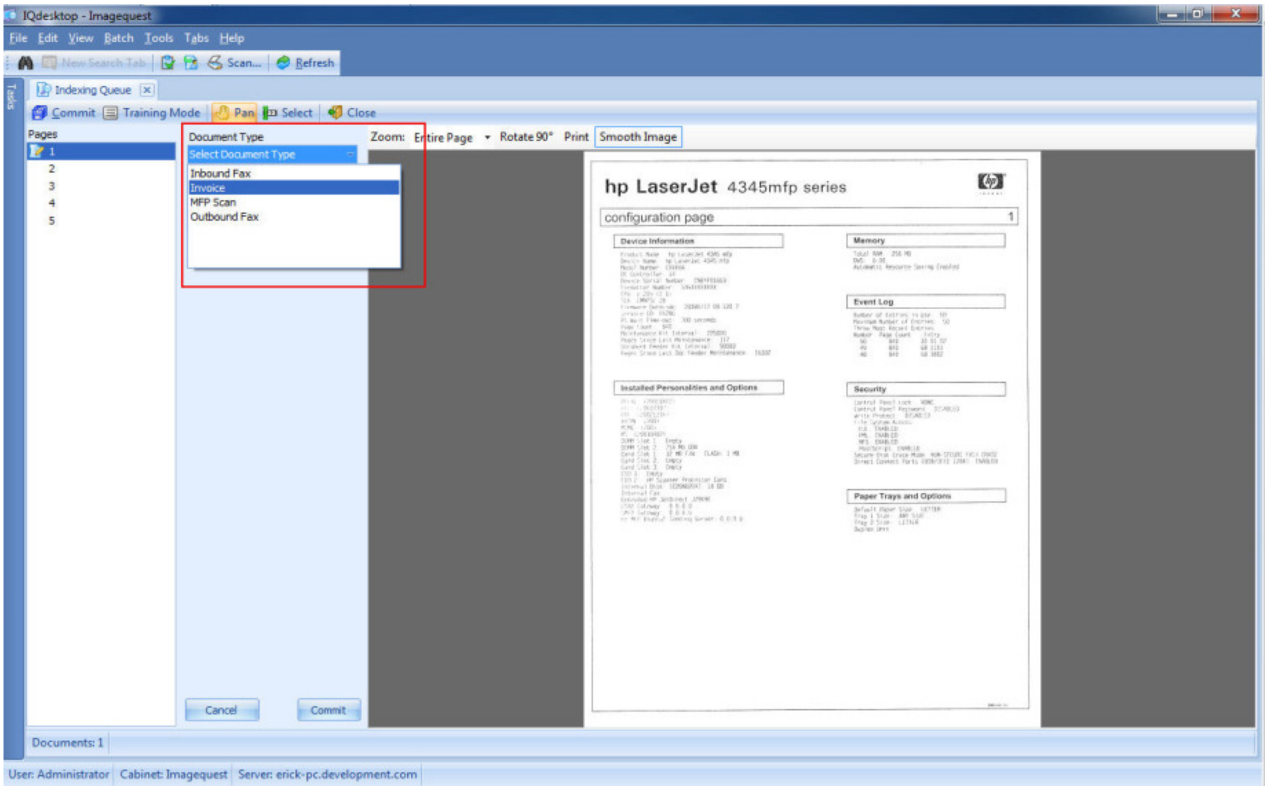
To close the window and return to the Indexing Queue, click Close or press the “Cancel” button at the bottom of the attribute window. To close the Indexing tab altogether, click × on the right of its tab as shown on the following page.  Any changes made to the current batch will be lost once the Indexer is closed.




To begin indexing the documents in the batch, designate the first page of the first document by selecting it using the **<SPACEBAR>.** The icon will appear to the left of the page number indicating that the page is the beginning of the document. The user may also designate the first page by right-clicking on the document page and selecting **Beginning of Document,** as shown below.

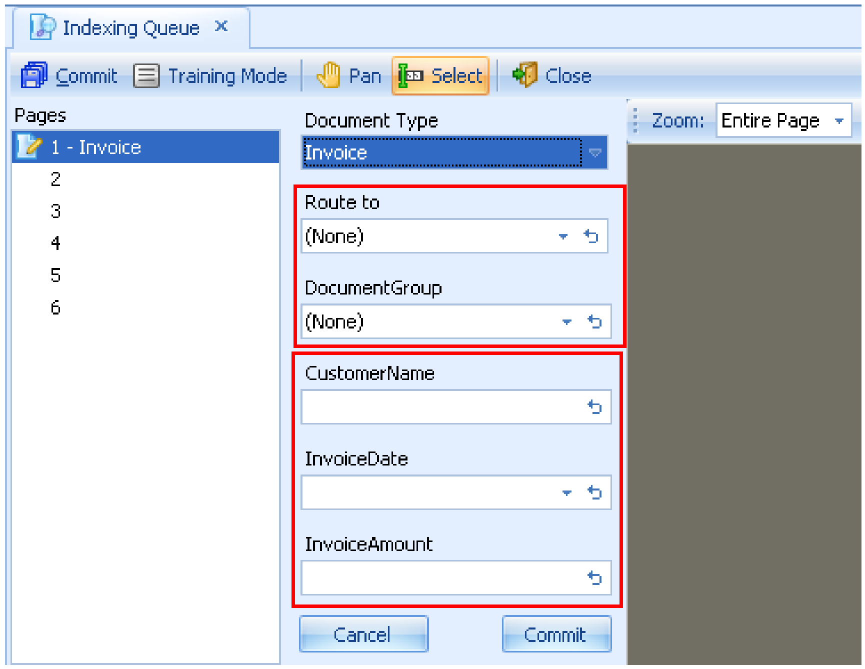


In the "Document Type" drop-down menu, select the document type to designate the first page of the document. For example, in the screenshot below, the first page of the document is an Invoice.

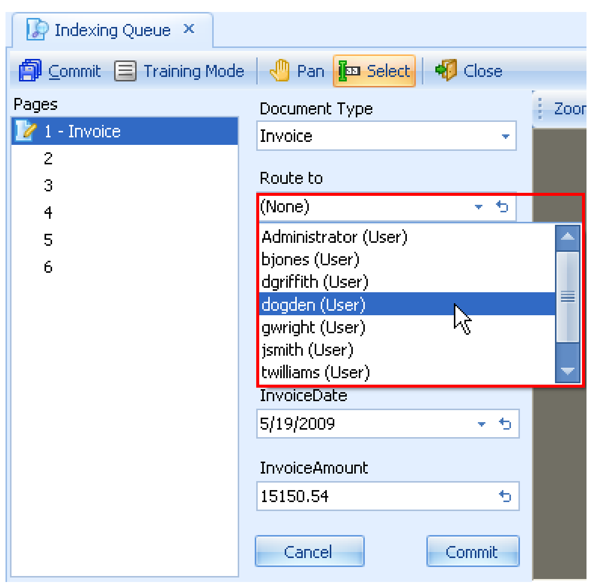



**<u>Note</u>: If a "Document Type" is not in the list, see the section for "Managing Document Types" or contact your System Administrator.**

When a document type is selected, the indexing fields for that document type become accessible as shown below. The user will **<TAB>** through the index fields that appear for the document type; these fields are called "Attributes" and become the index values that are used when searching for a document within ImageQuest.



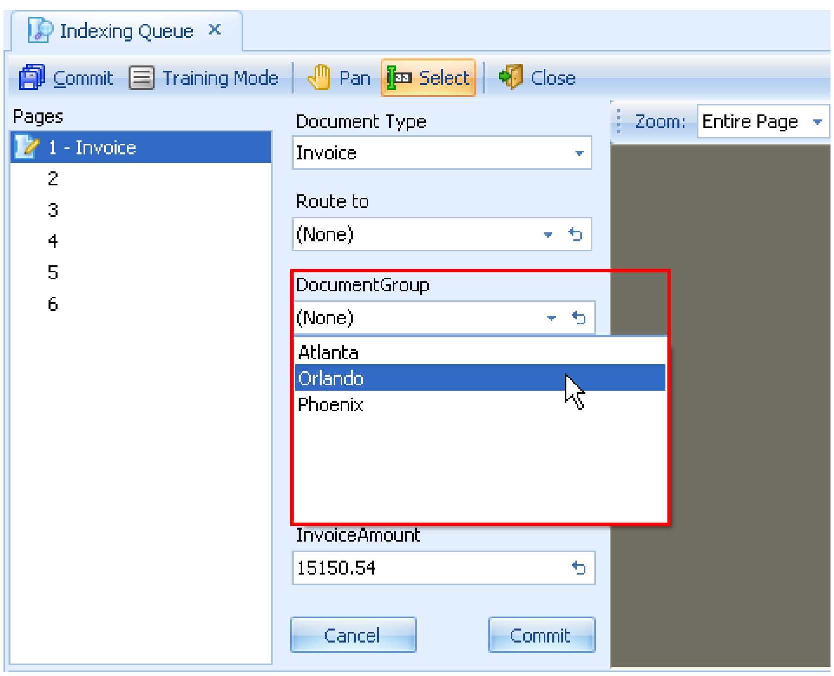

"**Route to**" is a system attribute available for every Document Type that allows the user the option to select a User or Role to route the document to. In the screenshot below, "dogden (User)" is selected from the "Route to" list for the highlighted Invoice. If this batch was committed now, a six page Invoice would be routed to dogden's "Work Queue".



Optionally, an email notification can be sent to the "Route to" user or users (if routed to a Role) to let them know a document has been routed to them. See the "Email Routing Configuration" section in the ImageQuest Administrator's Guide for more information.

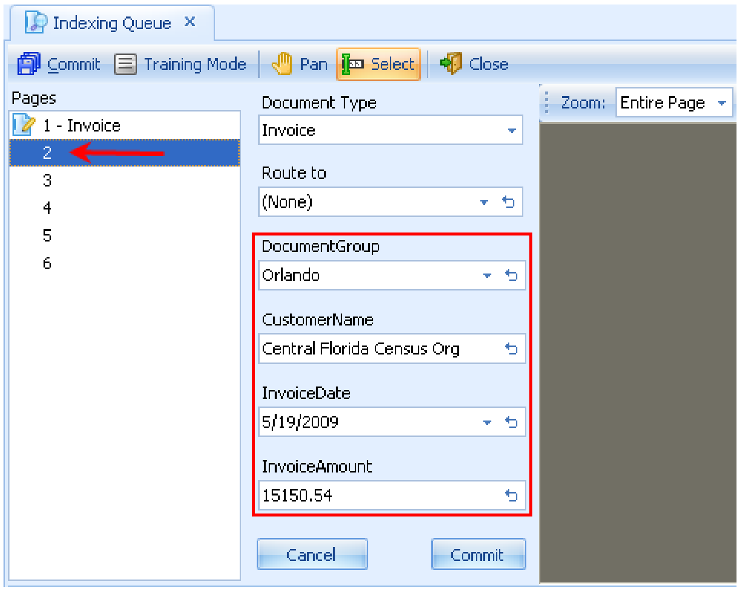
"**DocumentGroup**" is also a system attribute, but will only be available to users that are assigned to at least one Document Group in IQadministrator. Document Groups allow users to organize documents and further restrict access to Users or Roles in addition to the permissions set at the Document Type 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. See "Manage Document Groups" in the ImageQuest Administrator's Guide for more information on managing Document Groups.

In the example below, the indexing user is a member of three Document Groups, "Atlanta", "Orlando" and "Phoenix". Each group represents a regional location and the Sales Managers for each location are assigned to their respective Document Group. The first invoice is for Orlando and needs to be assigned to the "Orlando" group. To do this, the indexing user simply selects "Orlando" from the DocumentGroup list during the indexing process. Once the document is committed, only the Sales Managers that are assigned to the "Orlando" group will be able to search and view this Invoice.

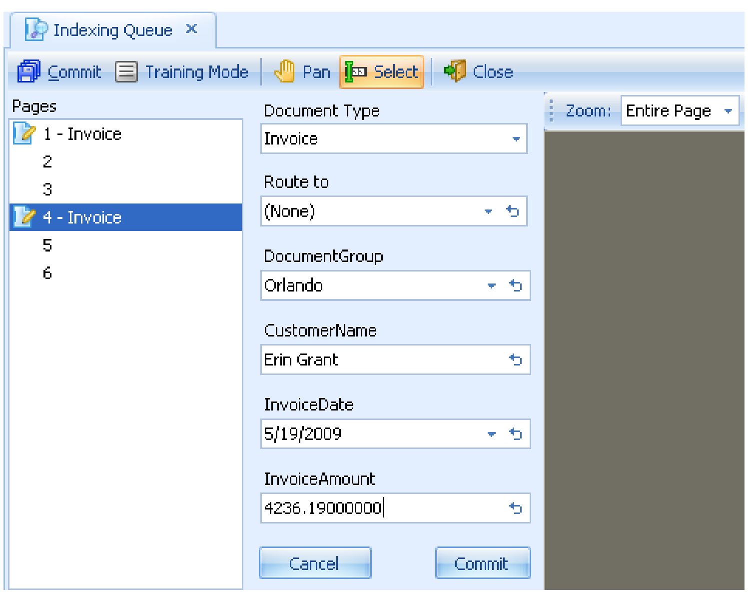



As additional documents are indexed, separate DocumentGroup assignments can be made as needed. If a particular document does not need to be assigned to a Document Group, the user does not make a selection and the default assignment is (None). If a document is not assigned to a DocumentGroup, any user or role that has permission to the Document Type will be able to search and view the document once it's committed.

If attribute data appears on multiple pages, the attribute data will remain when selecting different pages of a document as highlighted below for page 2. This is useful if the index values are located on a page other than the beginning page of the document, for example, an invoice total.

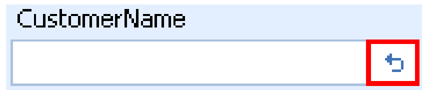



Once the last index field is filled in for a document type, **<TAB>** to return to the "**Pages**" pane, or click on the next page to index the additional documents with each corresponding document type and completed index values as shown below. For example, Page 4 is the beginning page of another document of the type, "Invoice", with Pages 5 and 6 as attached pages. The attributes and indexing fields, "Customer Name", "InvoiceDate" and "InvoiceAmount" can be filled in for indexing prior to committing this batch.



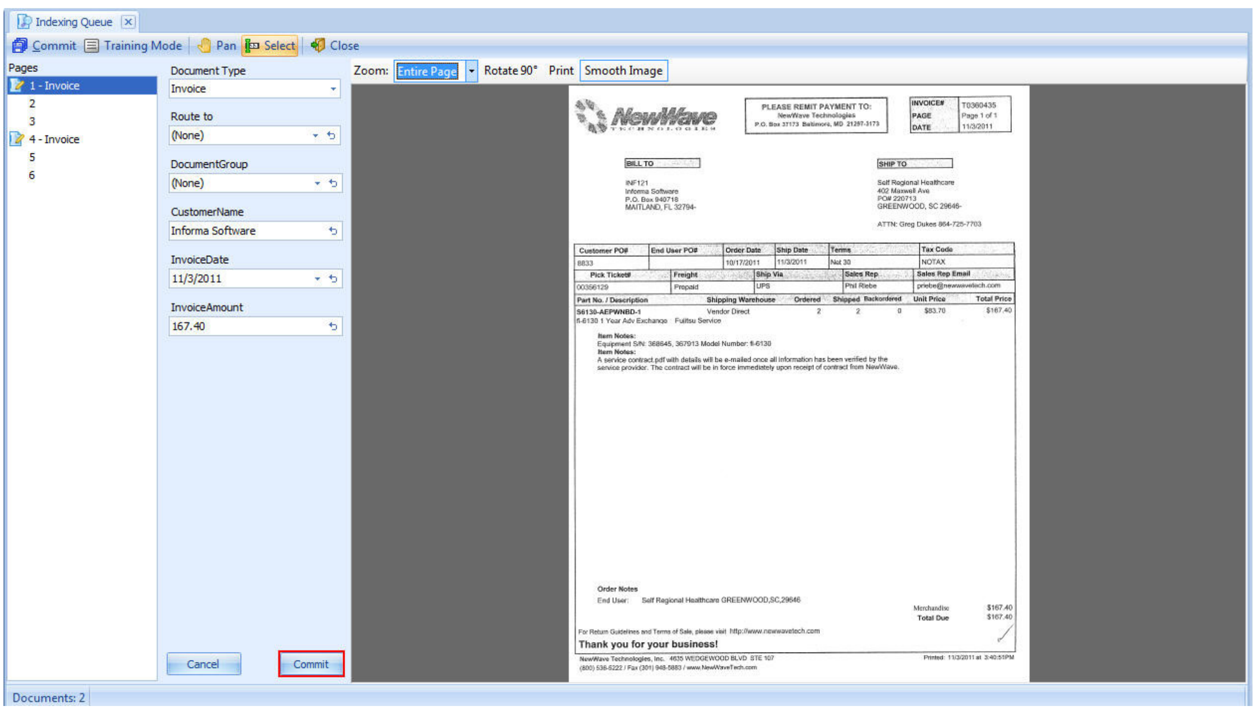
“Clear the current value” allows users to clear attribute information that was entered or selected during a search or edit.  This feature is available in all IQ search, edit or indexing windows.

See below.  To clear a value, click the  button to right of the entry field.

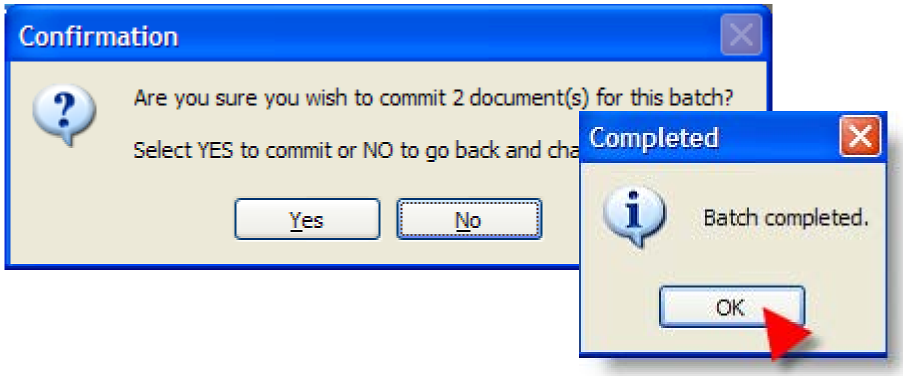



**<u>Note</u>:  This feature is not available for True/False or required attributes in the edit or indexing windows.**

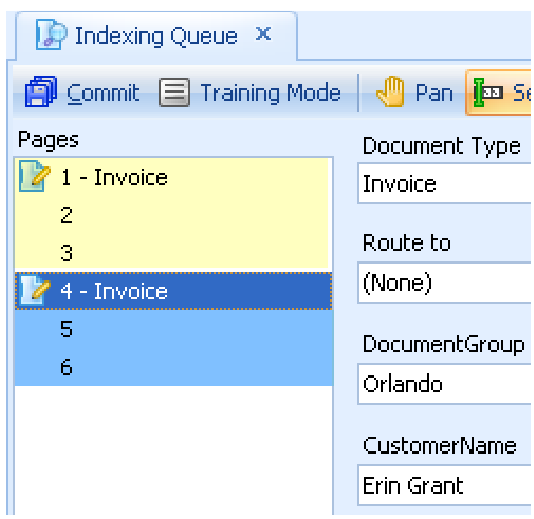
To commit the batch to ImageQuest, click on the “Commit” button, as shown below.



The "Confirmation" window appears below; click "Yes". The batch will be committed and after a few seconds, click "OK" in the "Completed" window. If you click "No," you will return to the active batch.

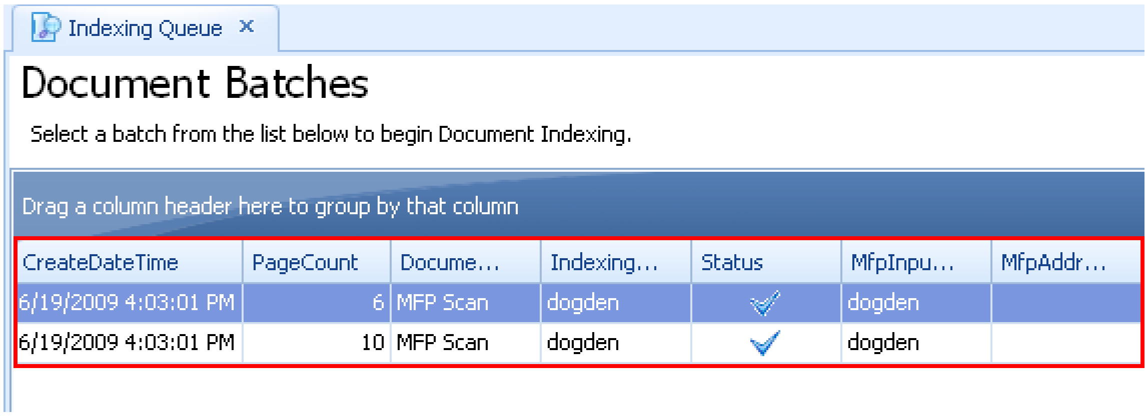



The "Confirmation" dialog box will report the number of documents to be stored in the Cabinet. Pages without icons next to them are not counted as part of the number of documents as illustrated below. For example, Pages 2 and 3 will be attached to Page 1 to the Document Type, "Invoice" highlighted in yellow and Pages 5 and 6 will be attached to Page 4 to a second Document Type, "Invoice" highlighted in blue. This results is two 3-page Invoice documents being sent into ImageQuest.



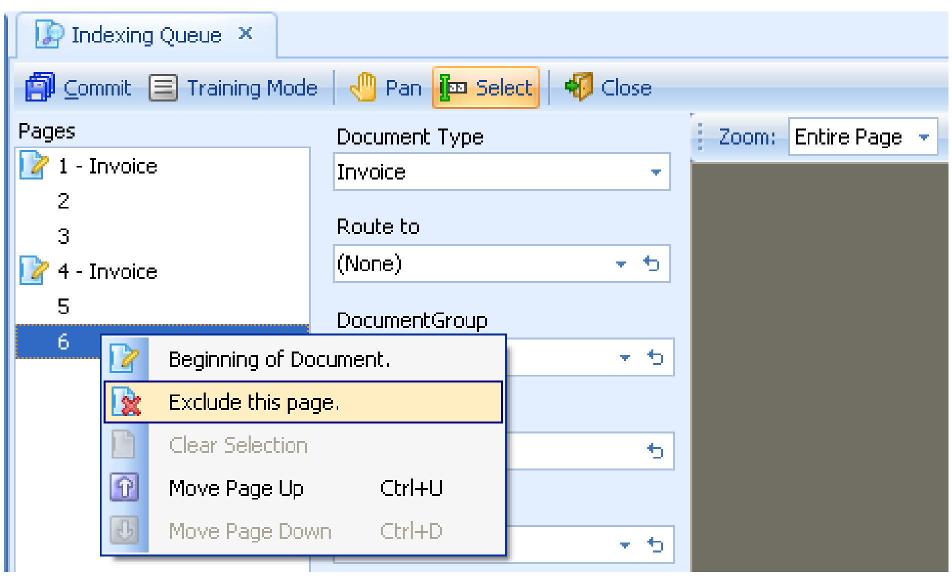

**<u>Note</u>: If required index values were not entered, a "Document Error" screen will show which page and which document has the missing value. Click the "Abort" button to stop the batch commit and make any necessary corrections.**

Once a batch is committed, the user will return to the Indexing Queue to show remaining batches to index as displayed below.

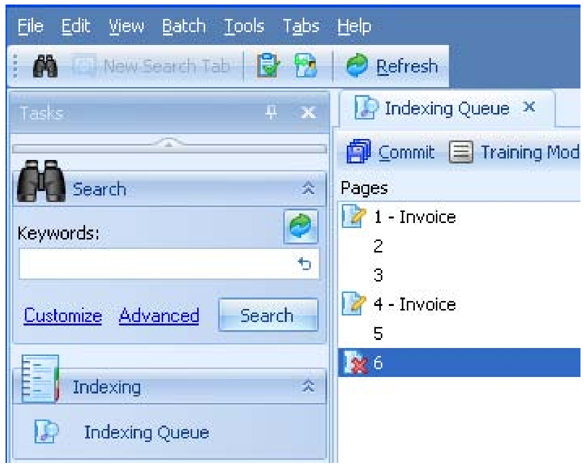



## Page Features in the Indexing Queue

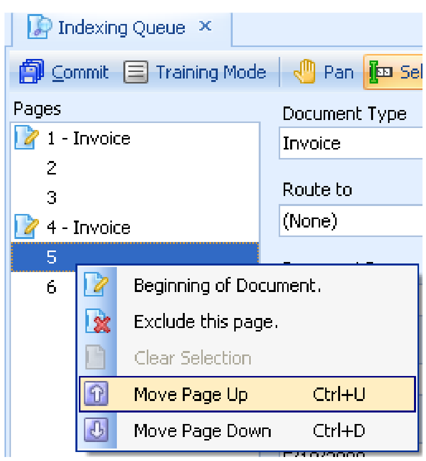
The available options on the right-click menu are **Beginning of Document**, **Exclude this Page, Move Page Up, Move Page Down** and **Clear Selection**. See below. You can exclude a page from a batch by highlighting and right-clicking it to select **Exclude this page**. When the document batch is committed, the images marked to be excluded will not be included with the documents.

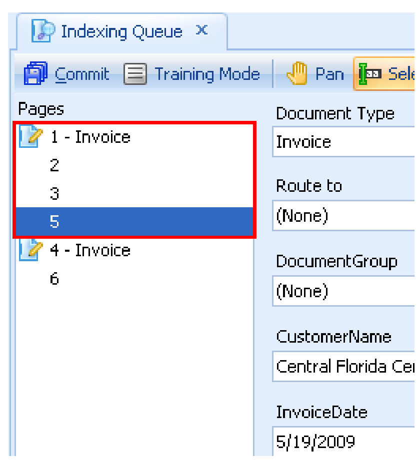


For example, as shown below, Page 6 has been excluded.  When this batch is committed, we will have two documents in ImageQuest:  one, three-page “Invoice” document consisting of Pages 1, 2 and 3 and one, two-page “Invoice” document consisting of Pages 4 and 5.




Changing the order of the pages in a batch is also possible by right-clicking on a page and selecting **Move Page Up (Ctrl+U)** or **Move Page Down (Ctrl+D)** as modeled below.  For example, Page 5 has been highlighted and moved up; as a result, the document type, “Invoice”, is now a four-page document consisting of Pages 1, 2, 3, and 5, and the second “Invoice” document consists of Page 4 and Page 6.



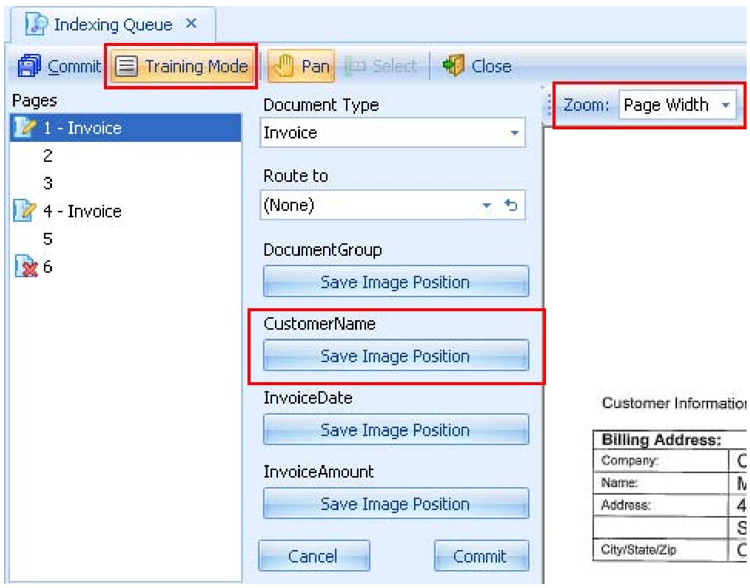




**Clear Selection,** as shown below, is used to deselect a page that has already been designated as a new document or that has already been excluded.

## Training Mode

The **Training Mode** feature allows focus on areas of the image to increase visibility and ease of indexing. You can use this mode to configure the document template for review. To enable this mode, click **Training Mode** below the "Indexing Queue" tab.

Next, select a Document Type and use the **Zoom** function to change the view of the document. Under each corresponding field, there will be a **Save Image Position** button as shown below.




After you zoom in on the desired section of the document, click **Save Image Position** to save the current position or magnification.

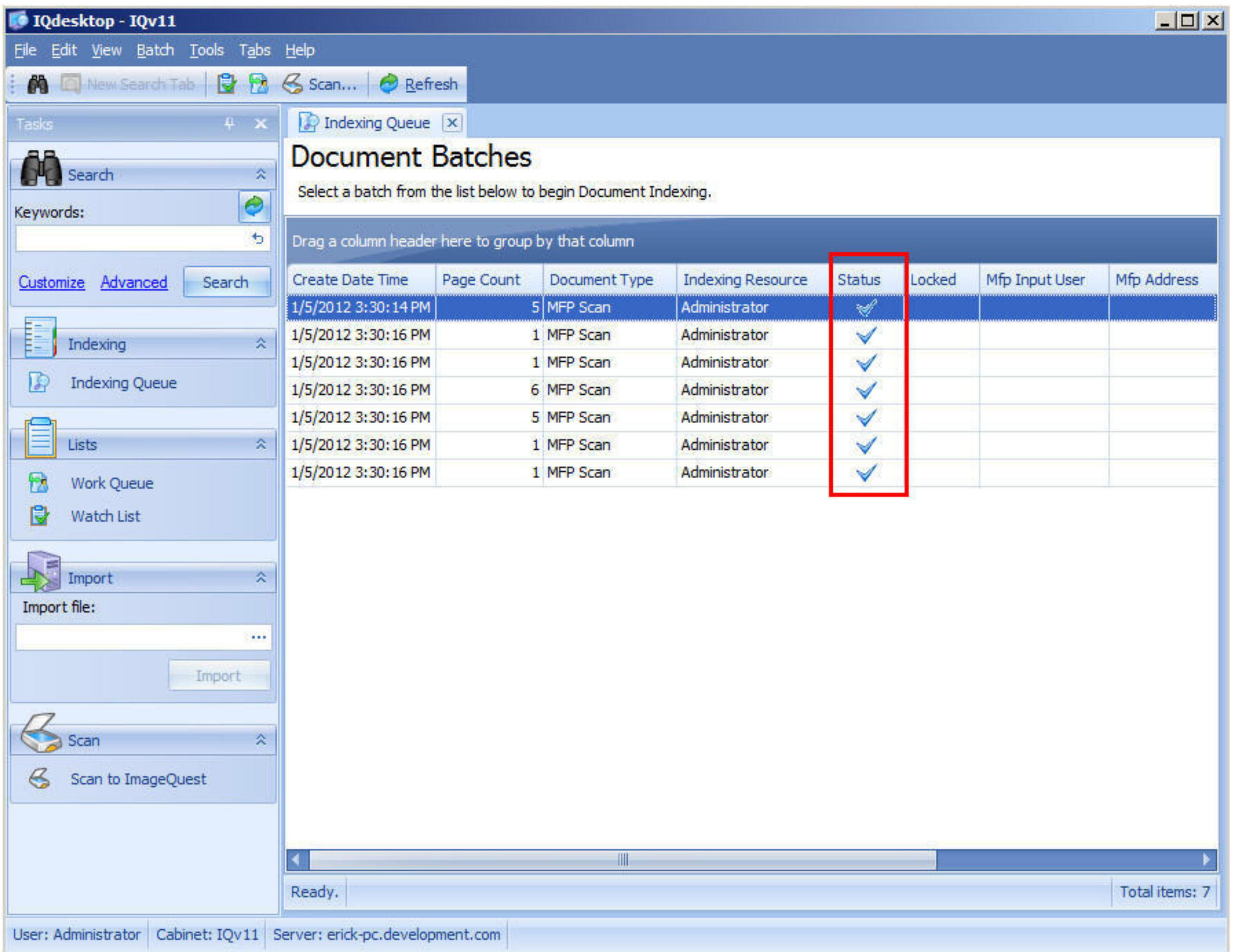
Once the image positions have been saved, click the **Training Mode** button again to return to indexing. From now on, the trained document type will automatically zoom to the appropriate areas as you tab through the attributes. Trained document types are user and machine specific, meaning that if another user logs into the same client PC, the document types will need to be retrained.

To remove training from a specific document type, enable **Training Mode**, set the zoom level to "Entire Page" and click **Save Image Position** for each attribute.

## IQ Smart Indexer

IQ Smart Indexer performs "IQ Smart Indexing" OCR on .tif files in the Indexing Queue to allow for quick "click and drag" indexing in the document Indexer. This feature allows users to index documents more efficiently and can reduce, if not eliminate, the need to type data.

A "Status" column displays the status of the IQ Smart Indexer process for each batch. See below.

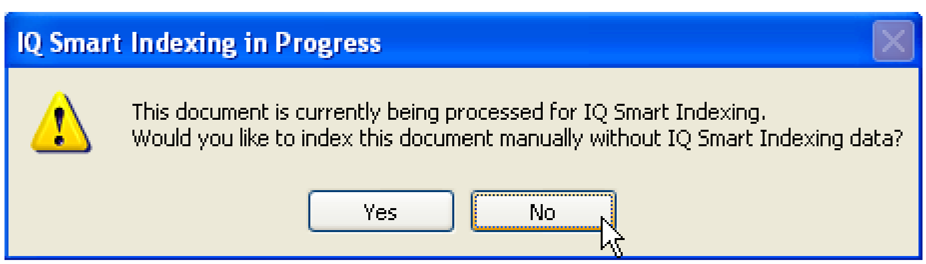


There are four different statuses for IQ Smart Indexer. See below for each icon and its description.

| Status Icon | Status Description |
|---|---|
|  | **Unknown** – The batch is in queue for IQ Smart Indexer. IQ Smart Indexing *cannot* be performed on the batch. |
|  | **In Process** – IQ Smart Indexer is currently processing the batch. IQ Smart Indexing *cannot* be performed on the batch. |
|  | **Completed** – IQ Smart Indexer has finished processing the batch. IQ Smart Indexing *can* be performed on the batch. |
|  | **Failed** – IQ Smart Indexer has failed for the batch. IQ Smart Indexing *cannot* be performed on the batch. |

A batch can be opened for manual indexing with any Status, but only batches with a "Completed" Status can be indexed with IQ Smart Indexing.

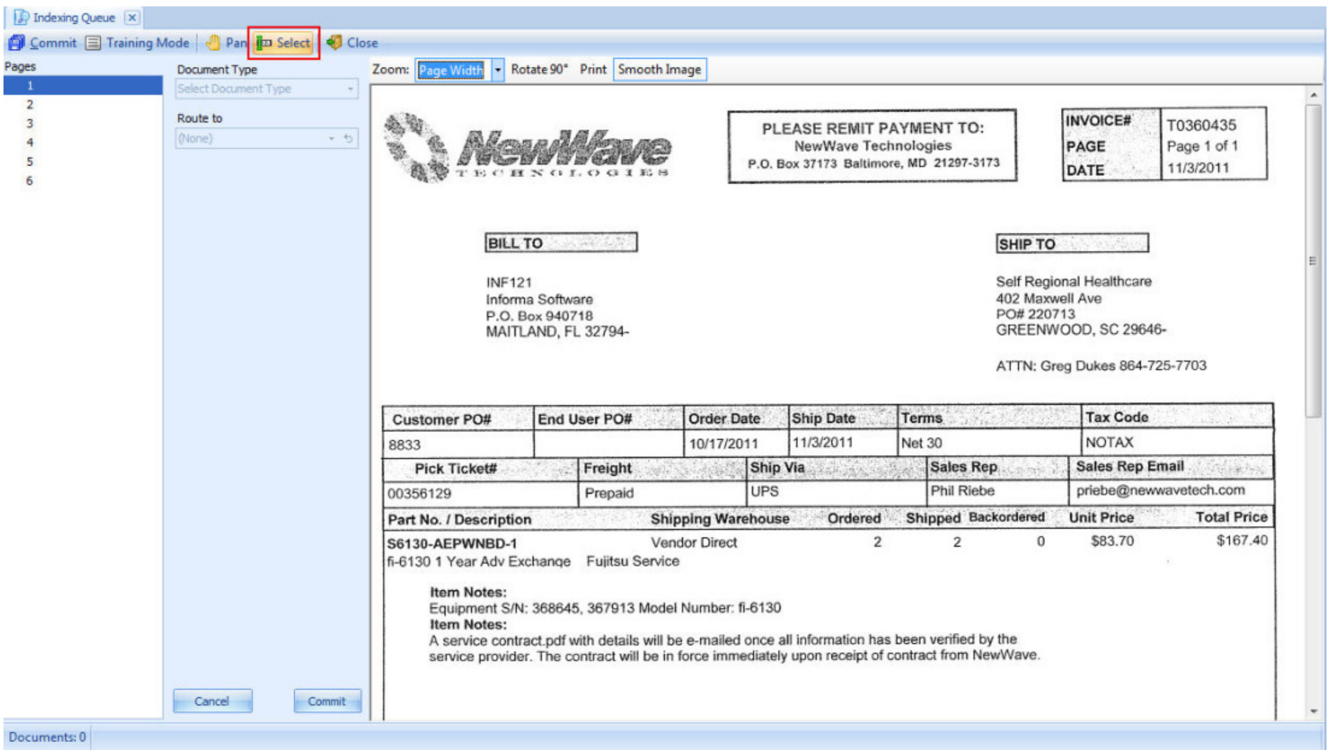
If a user attempts to open a batch that is "In Process", they will receive a message box as shown below.




Clicking "Yes" will allow the user to proceed with manual indexing, but the "Select" tool will be disabled and IQ Smart Indexing cannot be performed. Clicking "No" will return the user to the Indexing Queue and the IQ Smart Indexer will continue to process the batch. Once the Status is "Completed", the user may re-open the batch and perform IQ Smart Indexing.

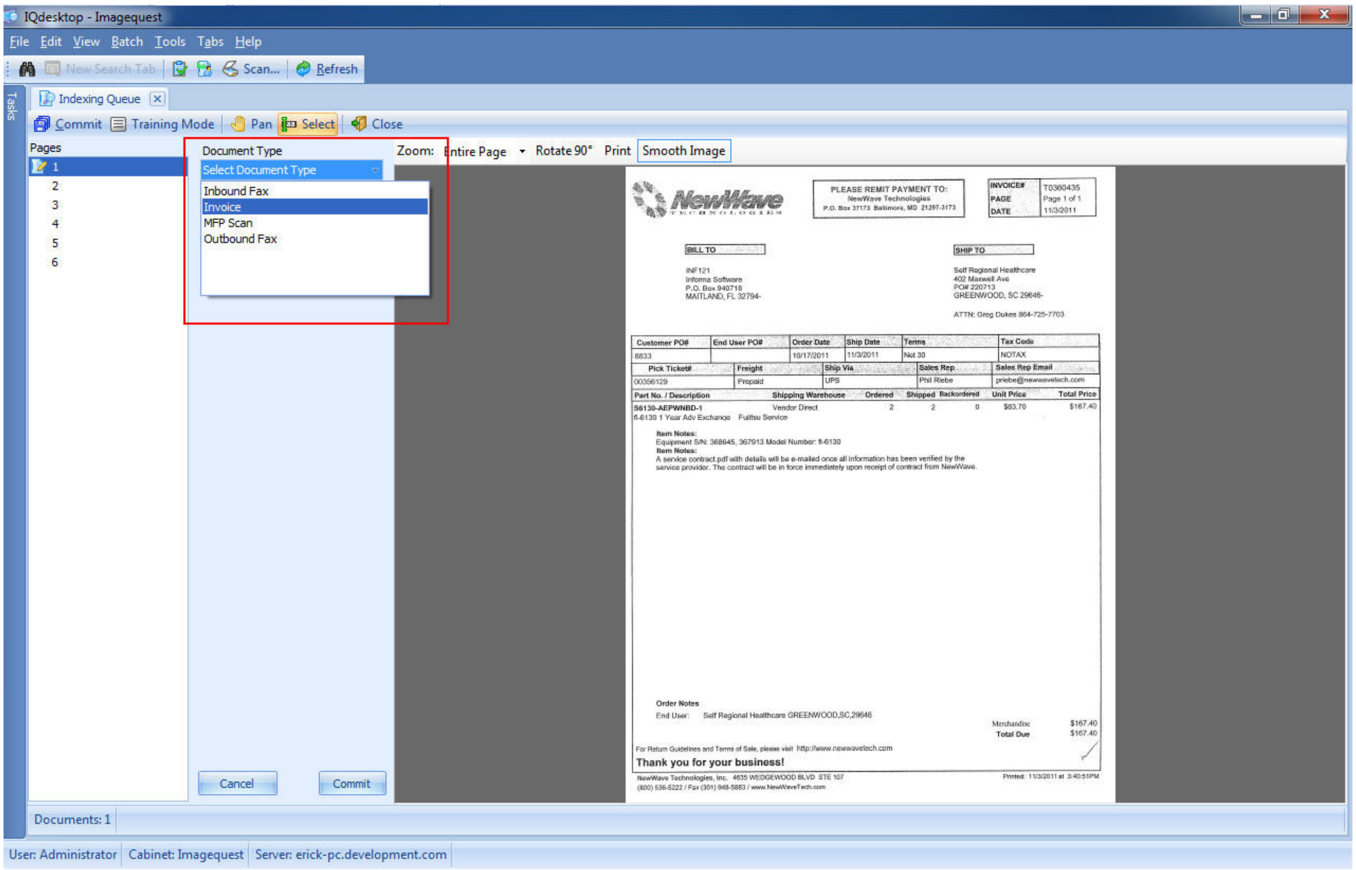
Once the Status for a batch is "Completed", IQ Smart Indexing can be performed on the batch. To begin IQ Smart Indexing, highlight a batch with a "Completed" Status as demonstrated below and double-click it. This will open the main Indexer screen.

Note that all the tools for manual indexing (Training Mode, Pages, Zoom, Rotate, etc.) are still available, but the "Select" button is enabled as well. The "Select" button must be enabled and selected in order to use IQ Smart Indexing.

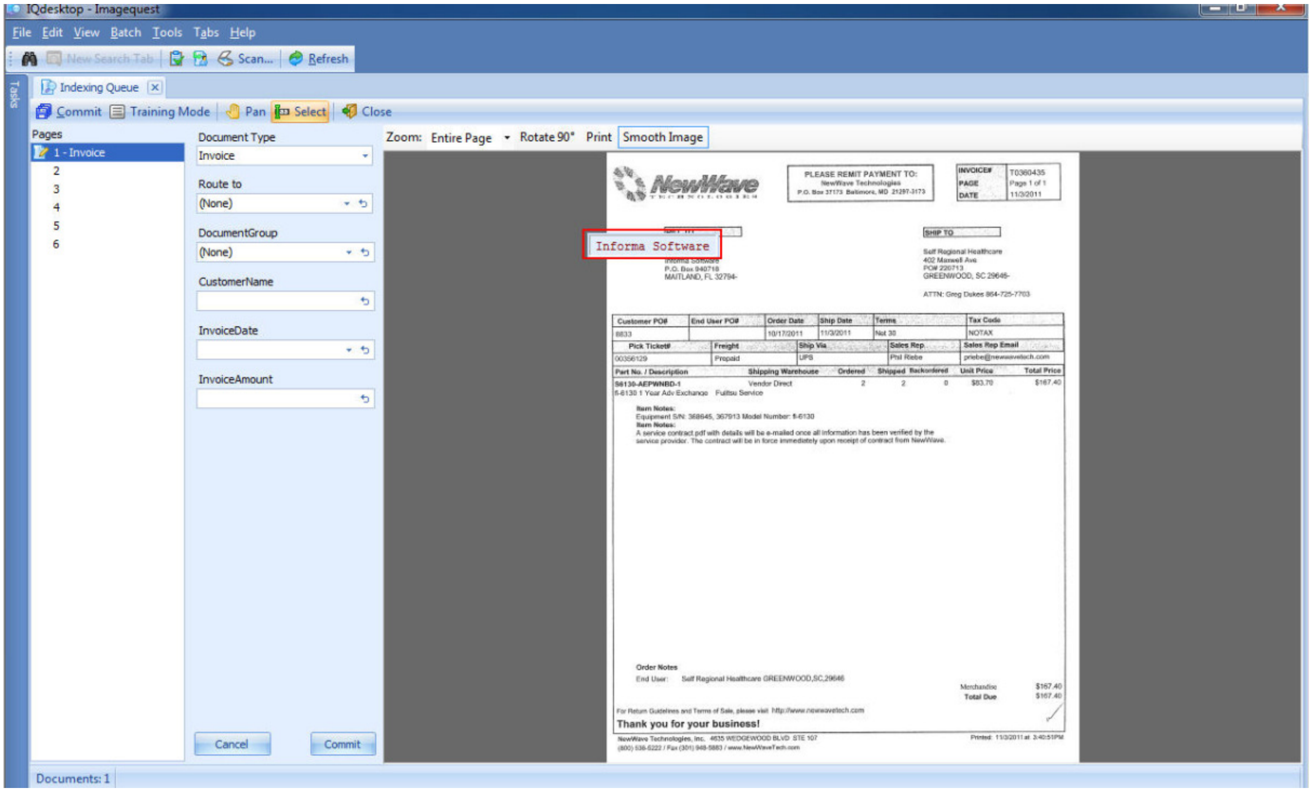


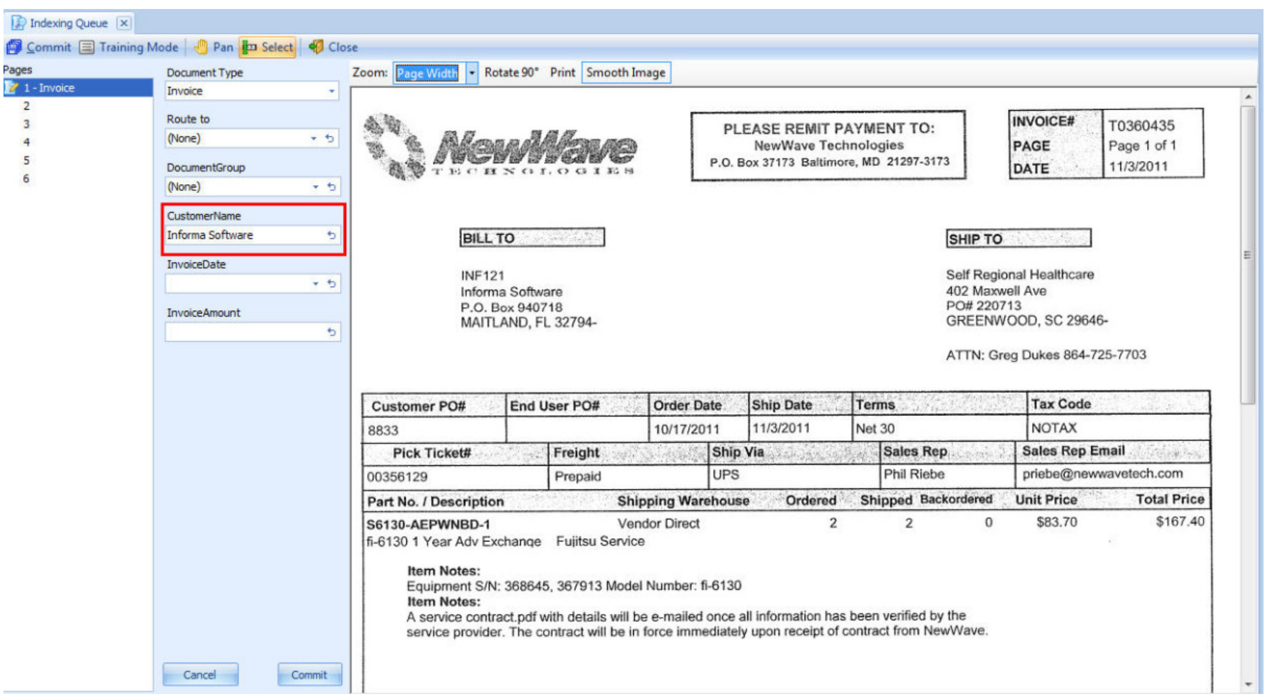

To use IQ Smart Indexing on the documents in the batch, designate the first page of the first document by selecting it using the **<SPACEBAR>**. The  icon will appear to the left of the page number indicating that the page is the beginning of the document.

In the drop-down menu, "Document Type," select the document type to designate the first page of the document. For example, as shown below, the first page of the highlighted document is an invoice which means that this page is designated as the first page of the document type, "Invoice".

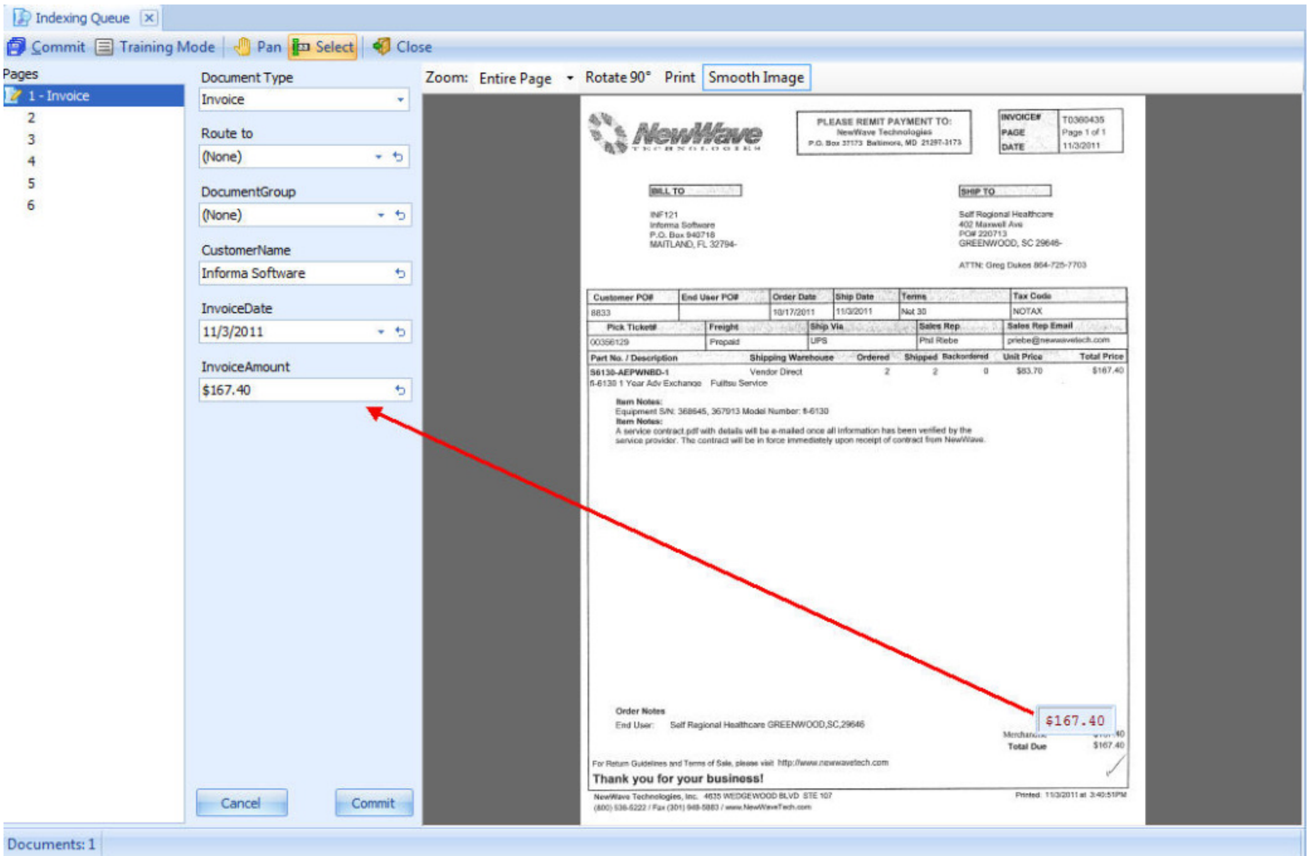



At this time, IQ Smart Indexing can be performed. Tab to the first attribute to be indexed. Next, locate the desired text in the image displayed in the Document window with the mouse cursor. Press and hold the left mouse button and, from left to right, drag over the text to capture. Release the left mouse button to populate the attribute with the selected text. In the screenshots on the following page, the user is using IQ Smart Indexing to populate the "CustomerName" attribute with the value "Informa Software" by clicking and dragging over the text on the image in the Document Window.


IQdesktop - Imagequest
File Edit View Batch Tools Tabs Help
New Search Tab
Scan...
Refresh
Indexing Queue
Commit
Training Mode
Pan
Select
Close
Pages
1 - Invoice
2
3
4
5
6
Document Type
Invoice
Route to
(None)
DocumentGroup
(None)
CustomerName
InvoiceDate
InvoiceAmount
Cancel
Commit
Zoom: Entire Page
Rotate 90°
Print
Smooth Image
Informa Software
Documents: 1


Indexing Queue
Commit
Training Mode
Pan
Select
Close
Pages
1 - Invoice
2
3
4
5
6
Document Type
Invoice
Route to
(None)
DocumentGroup
(None)
CustomerName
Informa Software
InvoiceDate
InvoiceAmount
Cancel
Commit
Zoom: Page Width
Rotate 90°
Print
Smooth Image
NewWave
TECHNOLOGIES
PLEASE REMIT PAYMENT TO:
NewWave Technologies
P.O. Box 37173 Baltimore, MD 21297-3173
INVOICE# T0360435
PAGE Page 1 of 1
DATE 11/3/2011
BILL TO
INF121
Informa Software
P.O. Box 940718
MAITLAND, FL 32794-
SHIP TO
Self Regional Healthcare
402 Maxwell Ave
PO# 220713
GREENWOOD, SC 29646-
ATTN: Greg Dukes 864-725-7703
Customer PO# End User PO# Order Date Ship Date Terms Tax Code
8833 10/17/2011 11/3/2011 Net 30 NOTAX
Pick Ticket# Freight Ship Via Sales Rep Sales Rep Email
00356129 Prepaid UPS Phil Riebe priebe@newwavetech.com
Part No. / Description Shipping Warehouse Ordered Shipped Backordered Unit Price Total Price
S6130-AEPWNBD-1 Vendor Direct 2 2 0 $83.70 $167.40
fi-6130 1 Year Adv Exchange Fujitsu Service
Item Notes:
Equipment S/N: 368645, 367913 Model Number: fi-6130
Item Notes:
A service contract.pdf with details will be e-mailed once all information has been verified by the
service provider. The contract will be in force immediately upon receipt of contract from NewWave.

IQ Smart Indexing will then auto tab to the next attribute so the user can continue indexing the document.  See below.  The user has also populated "InvoiceDate" with "11/3/2011" and is in the process of populating "InvoiceAmount" with "167.40".




Assign and index additional documents in the batch as needed, and click "Commit" to commit the batch to ImageQuest.  Once a batch is committed, the user will return to the Indexing Queue to show the remaining batches to be indexed.

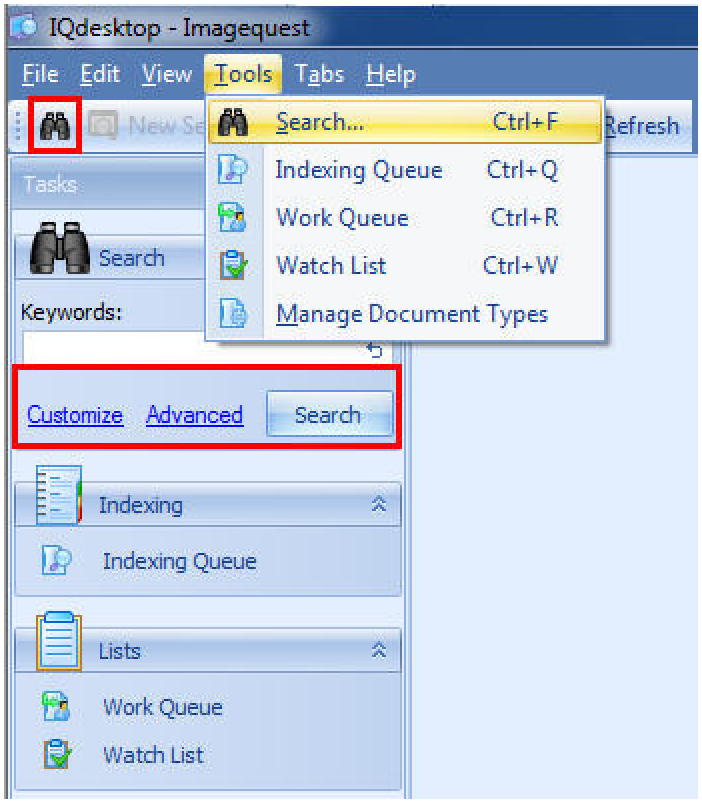
**<u>Note</u>:  IQ Smart Indexing and manual indexing can be performed on the same document if the Status for the batch is "Completed".**

## Searching for Stored Documents

The **Search** task allows for a wide variety of search options:  "Custom Search", "Keyword Search" and "Saved Queries"; these allow the user to perform a search based on any attribute value, one or more specific Document Types, and/or keywords within indexed documents.

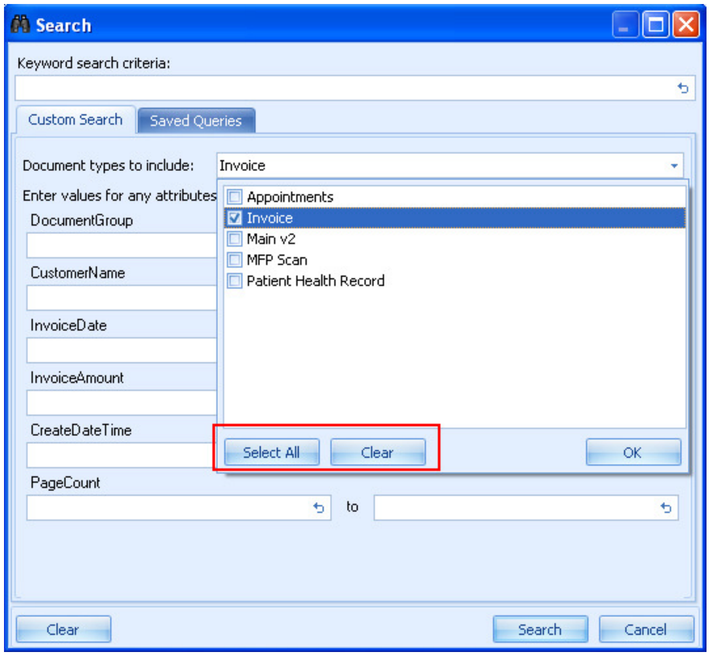
## Custom Search Tab

To initiate a search for documents, click the **Search** icon  in the toolbar, use the “Tools” menu to select the **Search** function as highlighted on the next page or click the “Advanced” link.

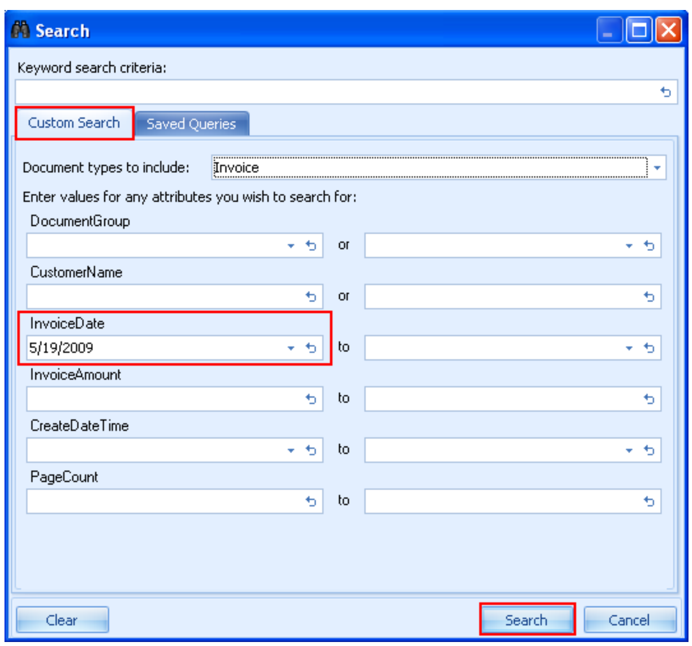



All document types are selected by default, so a user can simply enter or select attribute or keyword information and click “Search” to search all documents that meet the criteria.

See the following page. Users can select which document types to include in a search by checking or unchecking document types from a dropdown list. When a selection is made and the user clicks “OK”, the Search window will update to only reflect the attributes shared by the selected document types.



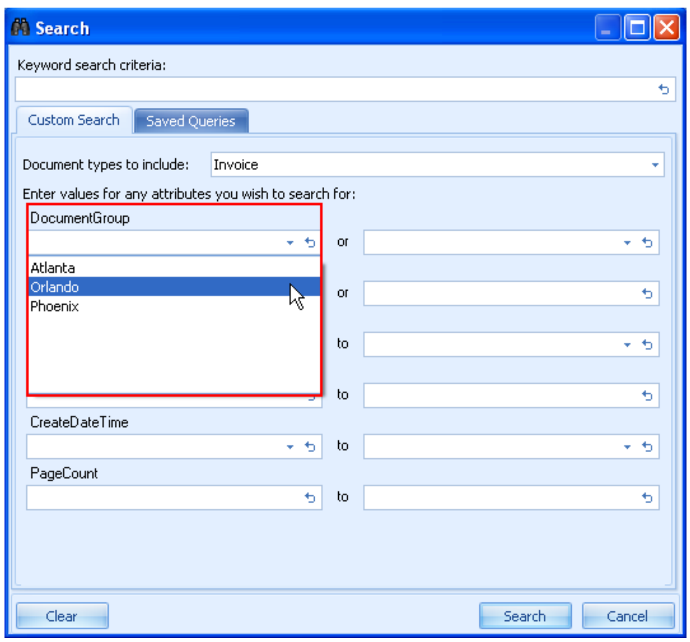

As shown below, a search is in effect for an InvoiceDate of 5/19/2009. By selecting a single Document Type, the list of all available attributes is changed to reflect only those attributes associated with that Document Type. Click "Search" once the desired index fields are completed.



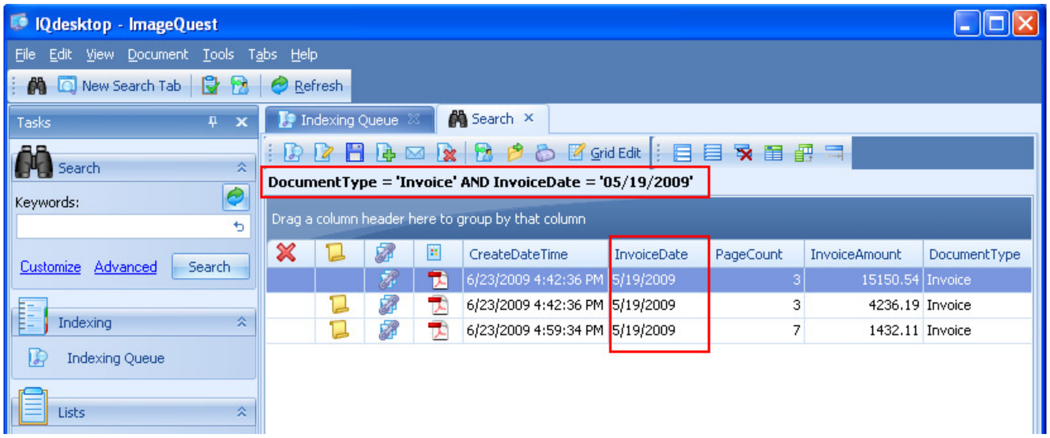
"DocumentGroup" is a system attribute, but will only be available to users that are assigned to at least one Document Group in IQadministrator. Document Groups allow users to organize documents and further restrict access to Users or Roles in addition to the permissions set at the Document Type level. 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. See "Manage Document Groups" in the ImageQuest Administrator's Guide for more information on managing Document Groups.

If the user searching for an "Invoice" document is not a part of a Document Group, the search will only return "Invoice" documents without a value for the DocumentGroup attribute.

When a user is a part of one or more Document Groups, as seen below, and chooses one of those DocumentGroup to search by, the search will return only "Invoice" documents with the specified value. When the same user leaves "DocumentGroup" blank, the search returns "Invoice" documents with "Atlanta", "Orlando", and "Phoenix" DocumentGroup values, as well as those invoices not associated with a DocumentGroup.



The custom search results below returns three Invoices with an InvoiceDate of 5/19/2009. The IQ search query is displayed in each Search tab so users can see the search criteria used for the displayed results.




When a second Document Type is selected, only the attributes common between the two Document Types will be available for search. Whenever a range of results is possible, the word '**to**' will appear between the left and right attribute fields. When searching within text fields, the '**or**' statement means that either or both criteria entered (whichever is true for the Document Type selected) will be returned in the search results.

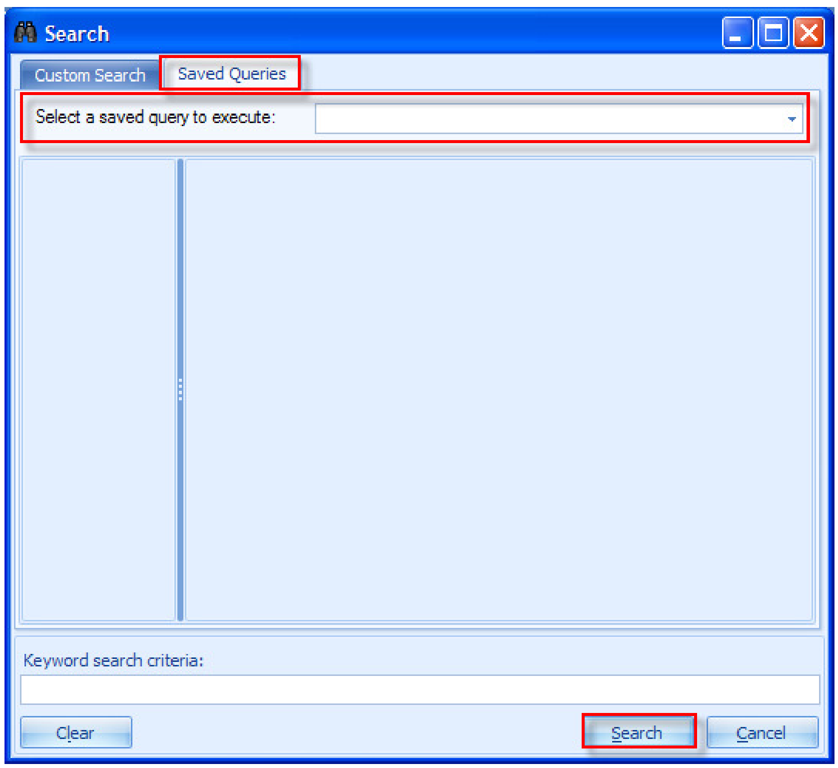
The wildcard value (*) may be used when exact information is not known, or when broader search results are desired. For example, entering the asterisk at the end of the value like 'smi*' means that you are searching for any value that begins with the letters 'smi'. This search will return both 'Smith' and 'Smithers', etc. Placing the wildcard at the beginning and searching for '*mith' will return items that end in 'mith', like both 'Smith' and 'Blacksmith'. Placing a wildcard at both the beginning and the end and entering '*mit*' will return items that have 'mit' anywhere, like Smithers, Mitchell or Permit, etc.

**Note: Wildcards cannot be used on attributes that use Input Masks. This includes integer and numeric attribute types.**

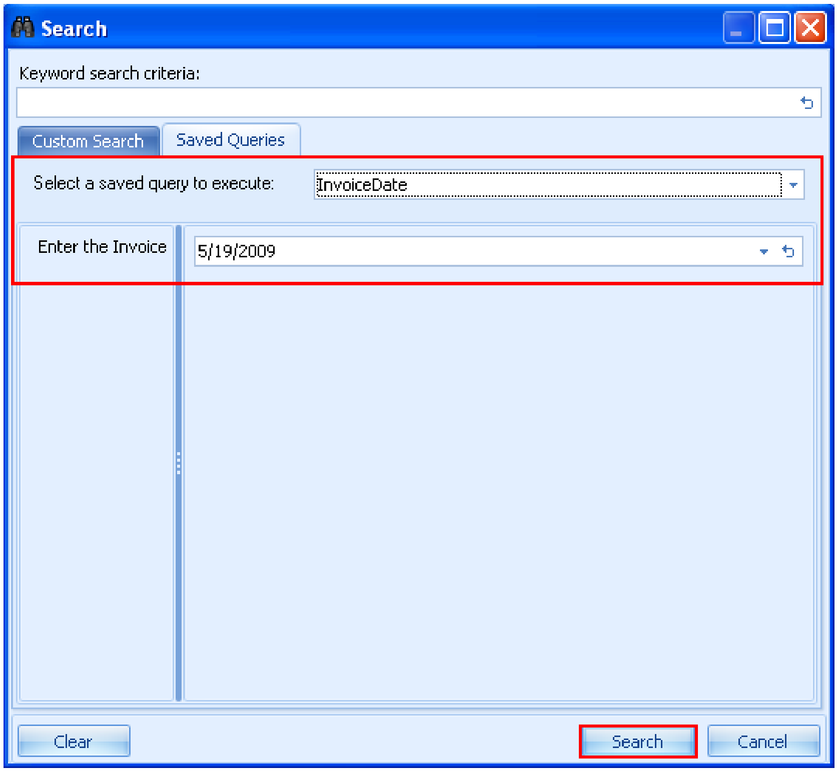
## Saved Queries Tab

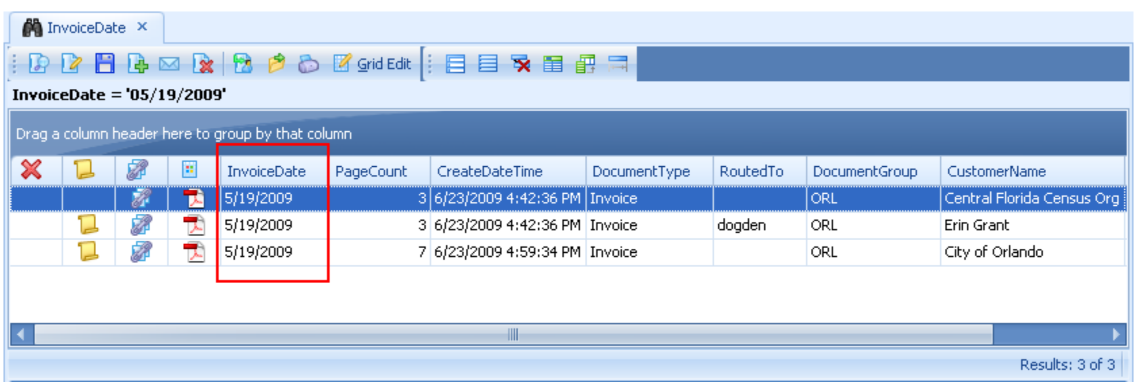
"Saved Queries" are predefined and configured to allow users to perform common and frequent. These save time, yet are limited to the search criteria established in the query.

The user may perform a search using the "Saved Queries" method in IQdesktop. Click the search icon  and then, click the "Saved Queries" tab as shown below to select a saved query from the drop down menu. Fill in any required attributes and then click the "Search" button.



The screenshot below gives an example of a saved query search based on the “InvoiceDate” attribute and its search result.




**<u>Note</u>: Saved queries must be configured in IQadministrator to be accessible from IQdesktop; see the ImageQuest Administrator’s Guide for more information on how to configure “Saved Queries”.**

**<u>Note</u>: Wildcard values (*) may NOT be used when inputting the user parameters of a saved query; if Full-Text searching is enabled, keywords may be entered in addition to saved query criteria to create a combined attribute based and keyword based search.**

## Keyword Search

Another way to search for stored documents is by entering the keywords in the "Keywords" field in the "Tasks" panel. Most common file types such as .txt, .doc, .pdf, and .xls documents are available for Full-Text search; the search results will include all documents that contain the keyword criteria entered.

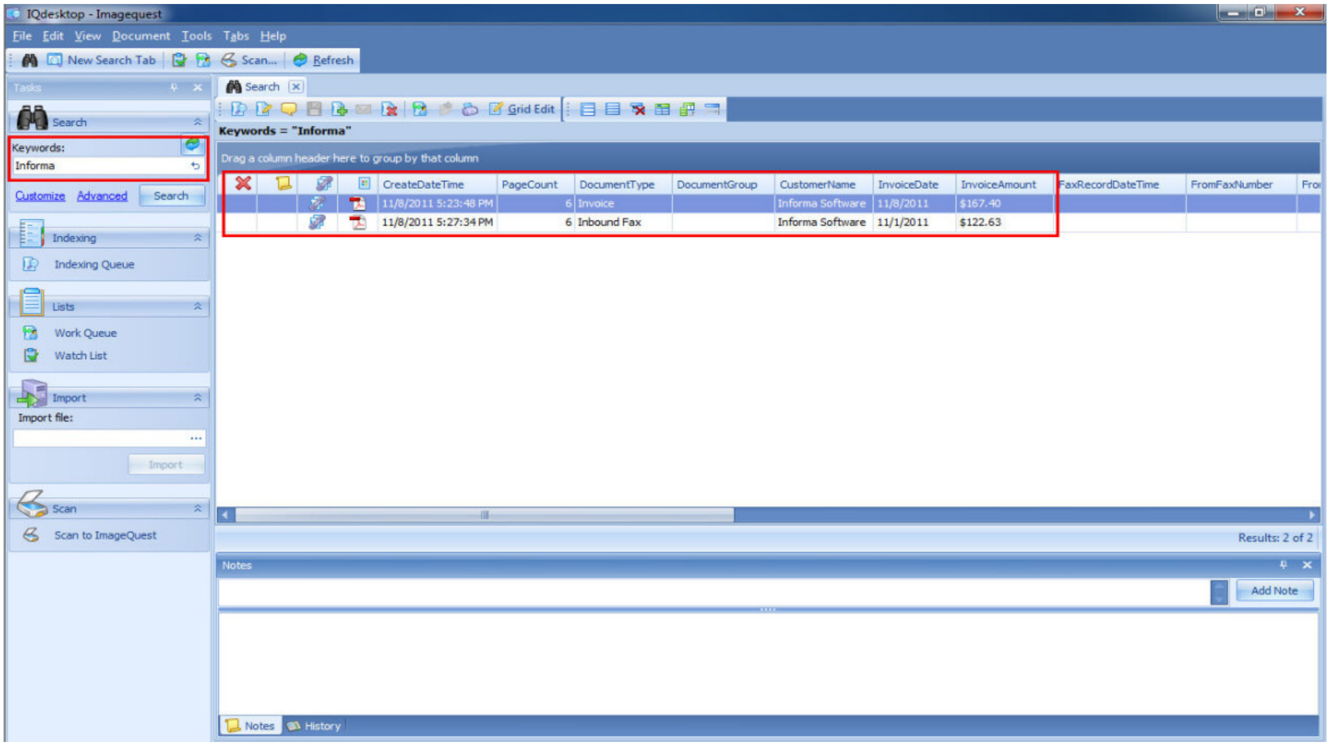
See below for search string examples and descriptions of valid full-text search syntax.

| Search String Example | Description |
|---|---|
| Invoice | Simple Match |
| Invoice OR Fax | OR |
| Software Hardware | Implied AND |
| Software AND Hardware | AND |
| Software NOT Hardware | Implied AND NOT |
| Informa* | Wildcard |
| (Software AND Hardware) AND NOT Informa | Parenthetical grouping |
| "Informa Software" | Exact phrase match |

**<u>Note</u>: Wildcard values (*) in the middle of a word (in*ma) are not supported.**

**<u>Note</u>: When using symbols and other non-alpha characters in the Keyword field, it may be necessary to enclose the search terms in quotation marks (i.e. "Joe's Crab Shack").**

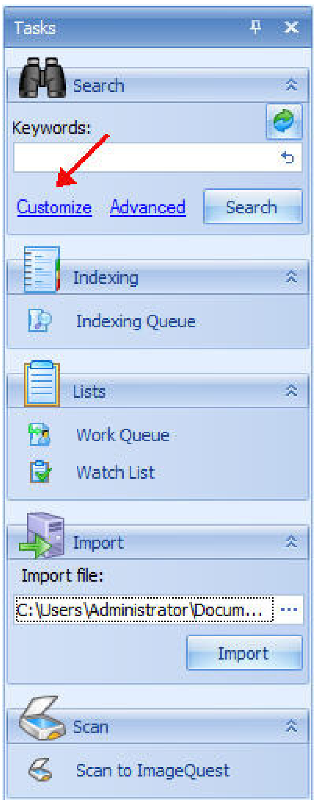
To use "Keywords", enter the phrase as the search criteria (and any custom or saved query criteria), for example, "Informa", and click "Search". See the screenshot on the following page to view the search results displaying two documents relevant to the search criteria.

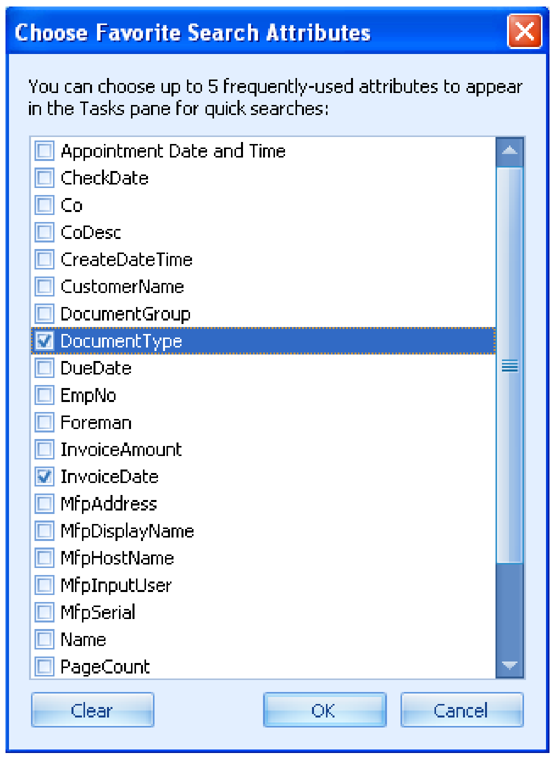

IQdesktop - Imagequest
File Edit View Document Tools Tabs Help
New Search Tab
Scan...
Refresh
Tasks
Search
Keywords:
Informa
Customize
Advanced
Search
Indexing
Indexing Queue
Lists
Work Queue
Watch List
Import
Import file:
Import
Scan
Scan to ImageQuest
Search
Grid Edit
Keywords = "Informa"
Drag a column header here to group by that column
CreateDateTime
PageCount
DocumentType
DocumentGroup
CustomerName
InvoiceDate
InvoiceAmount
FaxRecordDateTime
FromFaxNumber
11/8/2011 5:23:48 PM
6
Invoice
Informa Software
11/8/2011
$167.40
11/8/2011 5:27:34 PM
6
Inbound Fax
Informa Software
11/1/2011
$122.63
Results: 2 of 2
Notes
Add Note
Notes
History

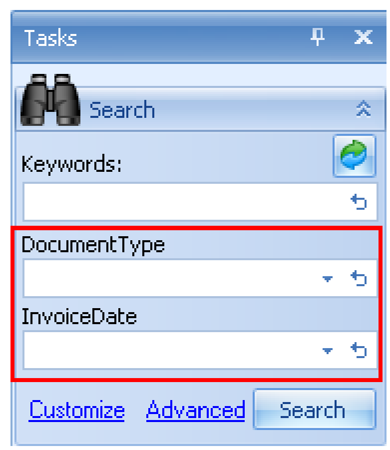
## Customize List

The Search task in IQdesktop includes a "Customize" feature that allows users to add frequently used search attributes to the Tasks panel as "favorites" for quick searching.

Click the "Customize" link to open the "Choose Favorite Search Attributes" window. You may select up to five attributes to be displayed in the tasks pane. The user can then enter or select search criteria and perform their search directly from the Search panel. See below.

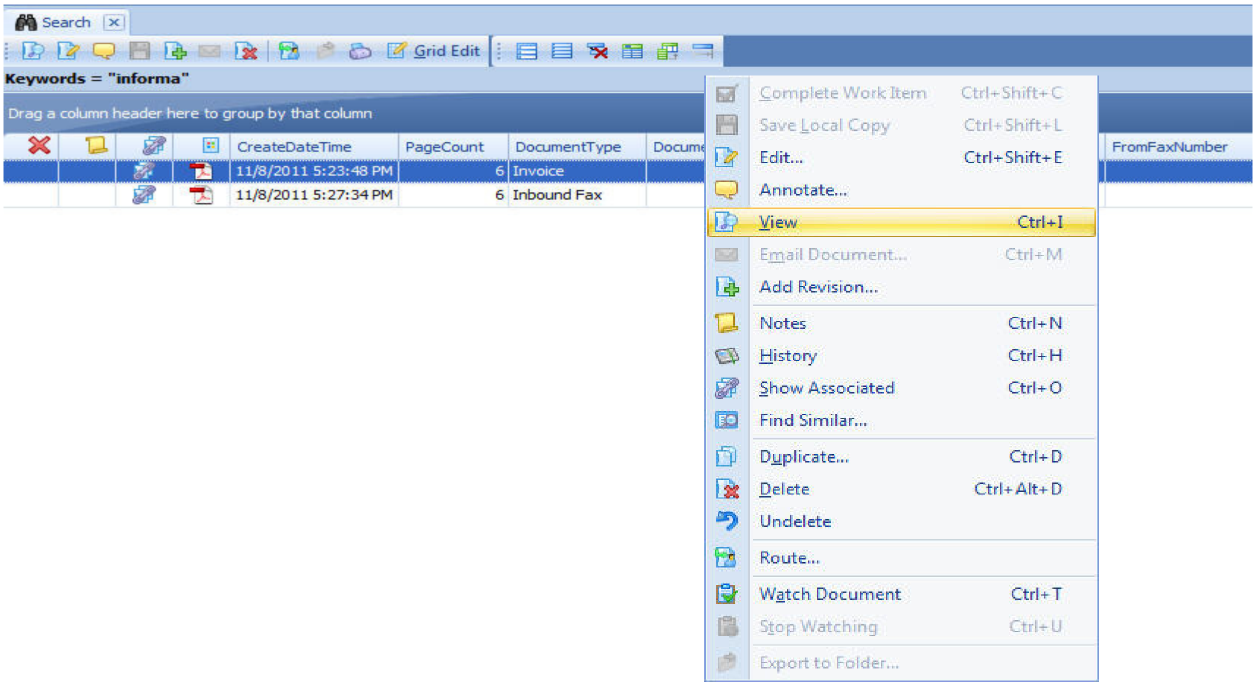


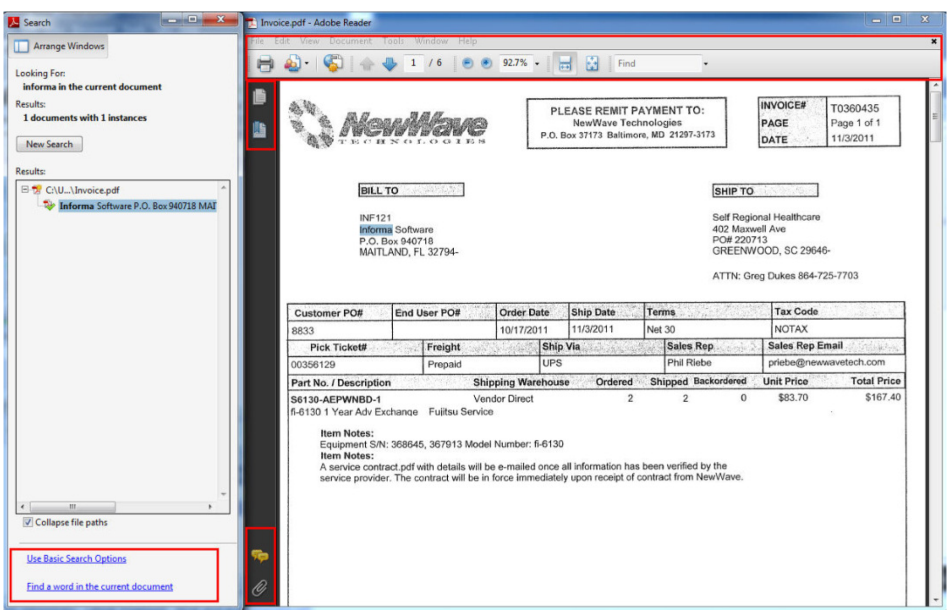



# Viewing a Document

Once the search function locates the desired documents, the documents may be viewed. To view a document, double-click it or right-click on it to open the menu and select **View Image (Ctrl+I)** as illustrated below.



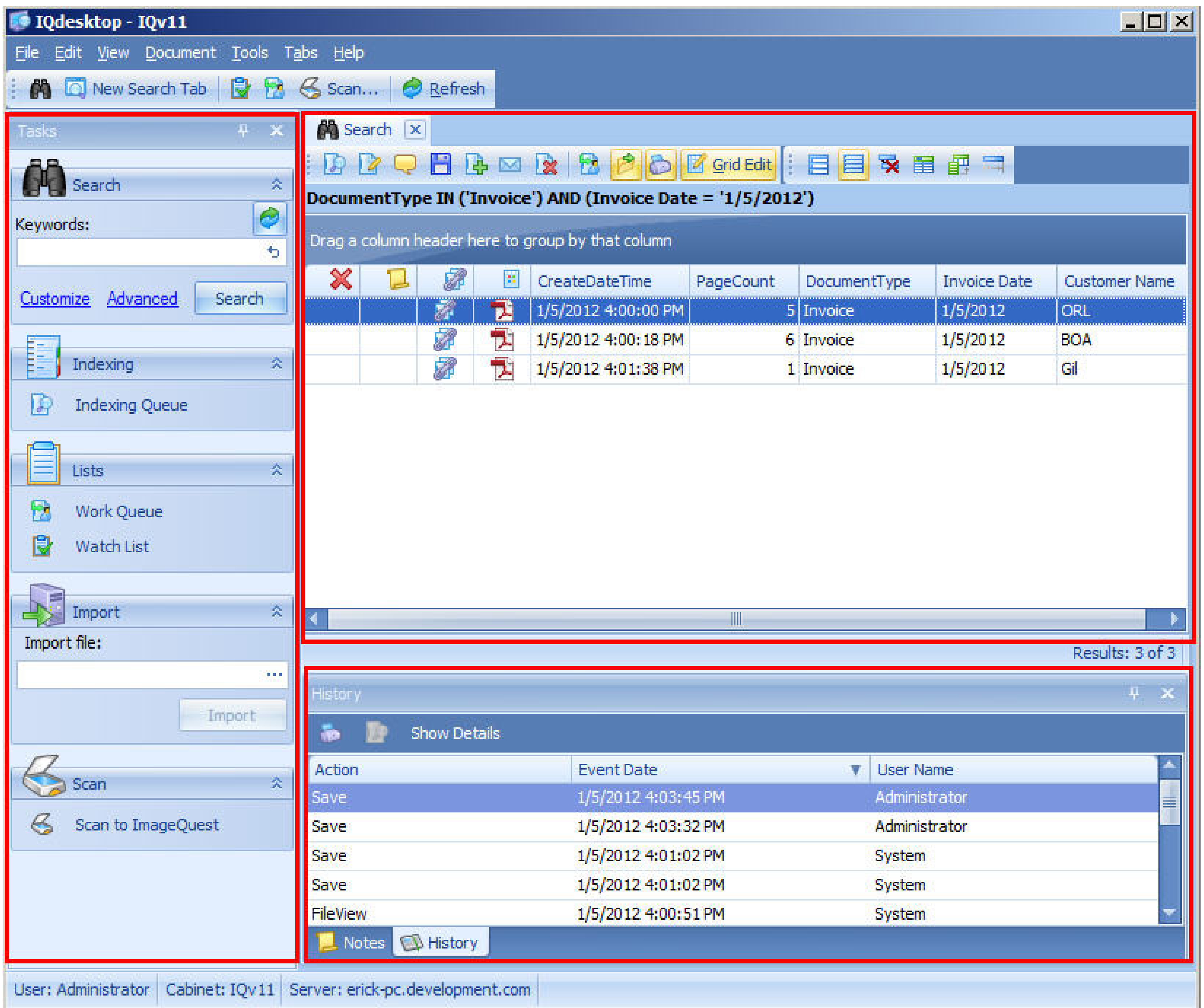

A document like the sample below is displayed in the user's default image viewer; this figure shows a PDF file opened in Adobe Acrobat Reader.



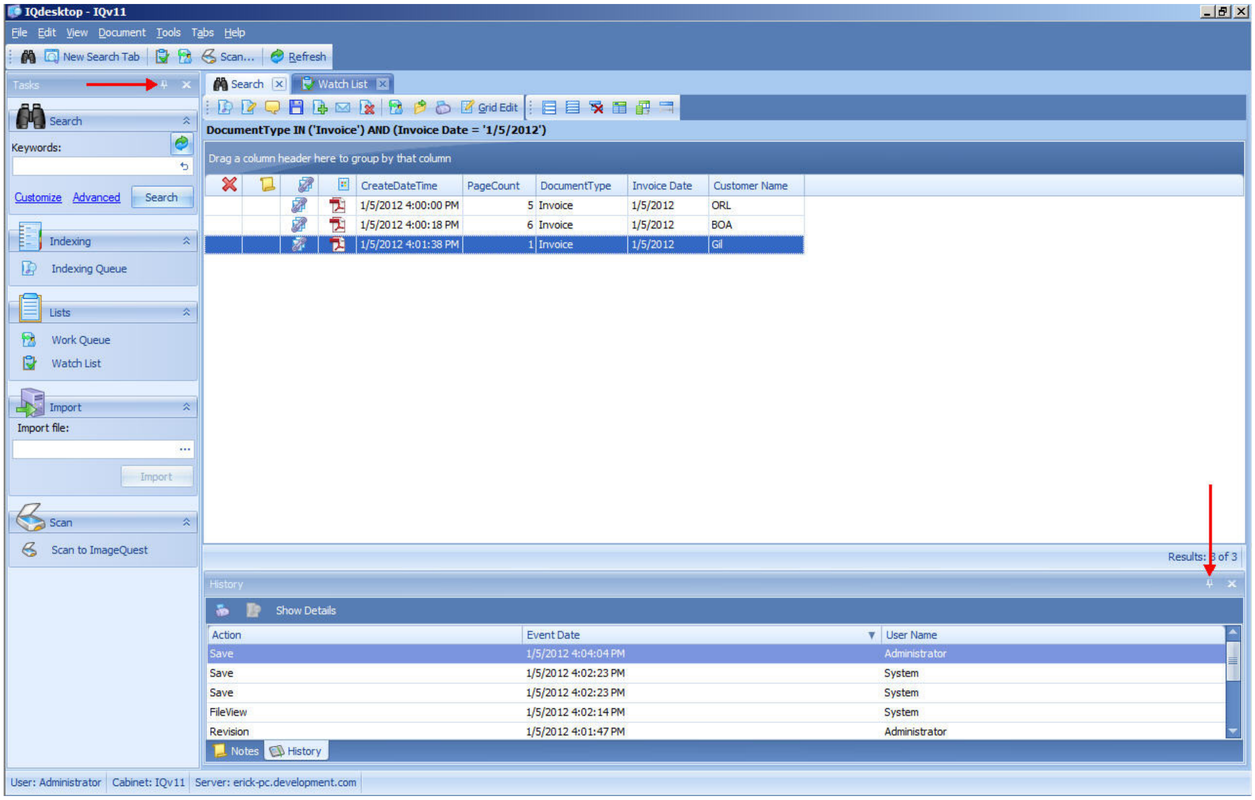
## Configuring the View

IQdesktop is highly configurable, allowing the user more screen "real estate" to display the information about the documents in a way that is most valuable to the user. The user also has leverage to emphasize any information displayed in each document. For example, by selecting which data columns are more desirable in sorting, grouping, and criteria for filtering.

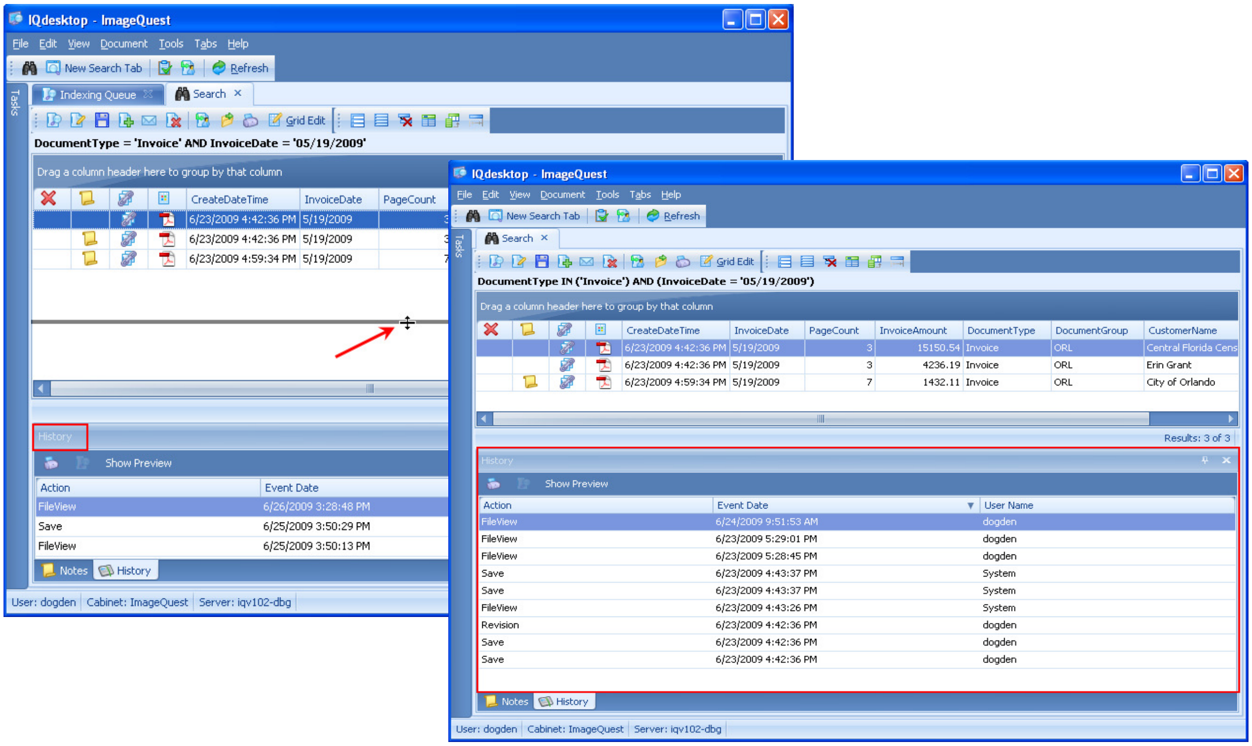
IQdesktop is comprised of three main areas by default, the Tasks panel on the left, the search grid on top and the Notes/History panels on the bottom as seen below. This screen can be customized in a variety of ways by hiding and closing some or all of the panels or by moving the panels to different parts of the screen.



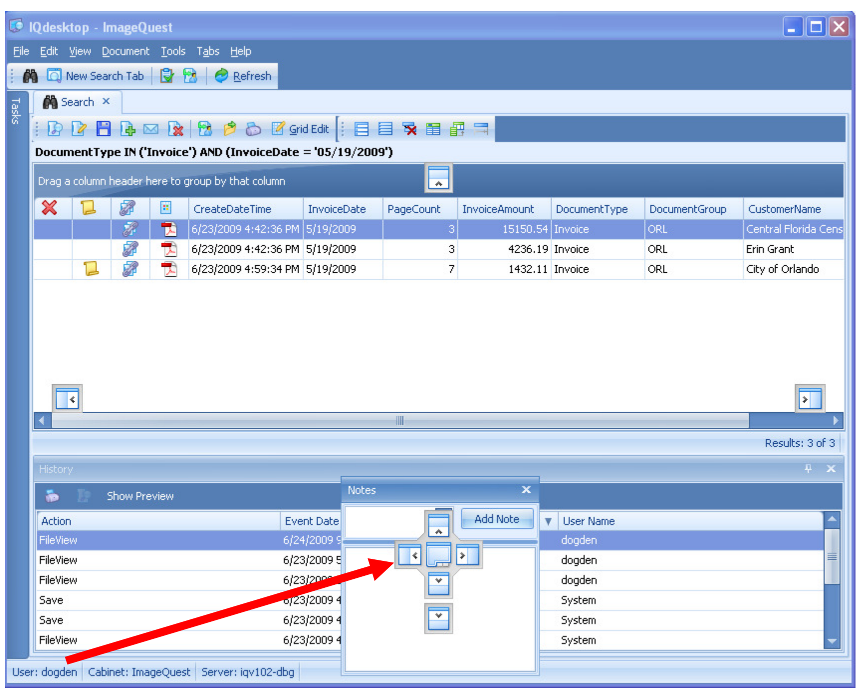

To increase screen "real estate", locate the pushpin icons on the "Tasks", "History", and "Notes" panels as highlighted on the following page. Unpinning the panels causes them to slide out of the way. To access the hidden panels, simply hover over the tabs. Click the pushpin again to allow the panels to always be shown on the screen. The panels may also be closed altogether by clicking on the **X** to the right of the pushpin.



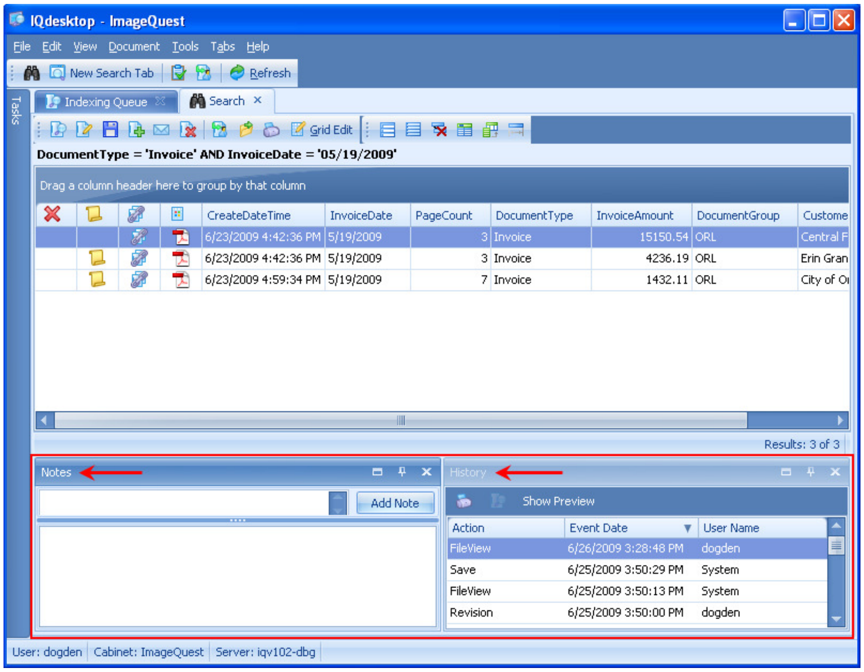

Another way to increase the screen "real estate" is by moving the mouse cursor between two panels until the  cursor shows up**.** Once the cursor changes to the double arrow click and drag the cursor to expand the panel as shown below.



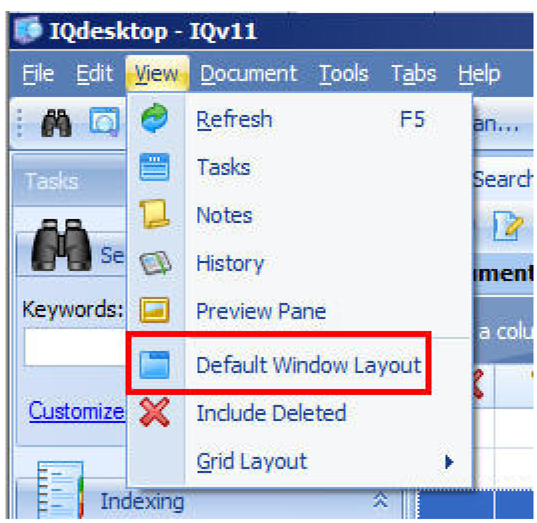

The three panels (Tasks, Notes and History) can also be moved around the screen and customized. To move one of the panels, first make sure that the panel is pinned. Next, click and drag the panel tab name to one of the drop position indicators as shown below. Release the mouse button when the panel shadow preview appears in the location you want.



In the example below, the "Notes" panel has been moved next to the "History" panel so both are viewable at the same time, as shown here.



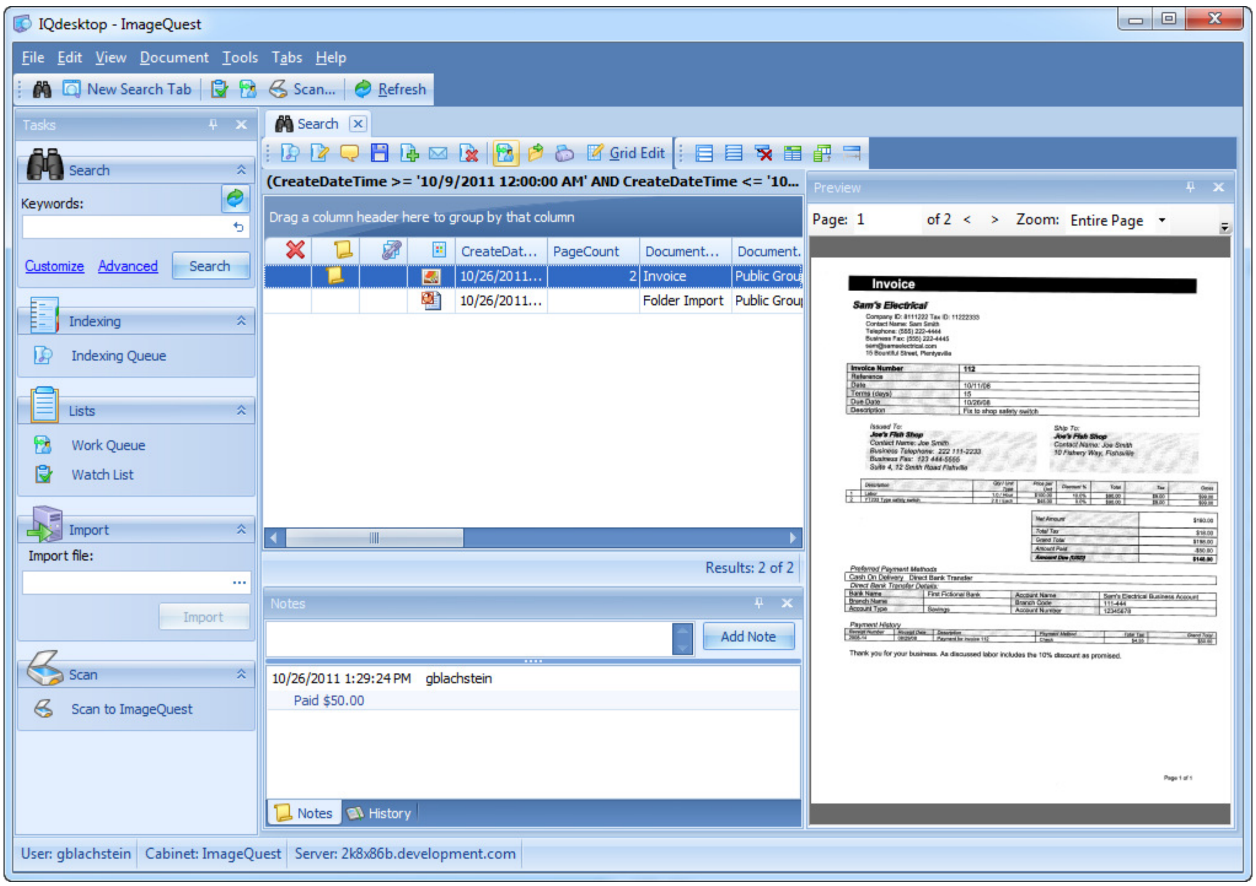

To return to the default window layout at any time, go to the "View" menu and select **Default Window Layout** as illustrated below.




Panel positions are saved automatically per user/per machine. If a user changes the view of the screen and logs out, once he/she logs back in, the screen view will return.

# Preview Pane

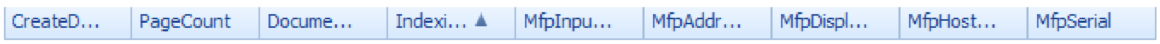
Beginning with version 11.0, the IQdesktop client now has an additional image preview pane that lets you see the document within the client without launching the associated application. ImageQuest uses built in Windows Preview Handlers, the same technology that Microsoft Windows Explorer and Microsoft Outlook use, in order to render the preview pane. The following file types should preview in IQdesktop without the need to install additional software: .bmp, .jpg, .rtf, .txt, and .tif. Additional preview handlers can be installed as well in order to preview other file types. Installing Microsoft Office 2007 or 2010 will activate previews for .doc, .docx, .xls, .xlsx, .ppt, and .pptx while installing Adobe Reader 9 or 10 will activate .pdf files.



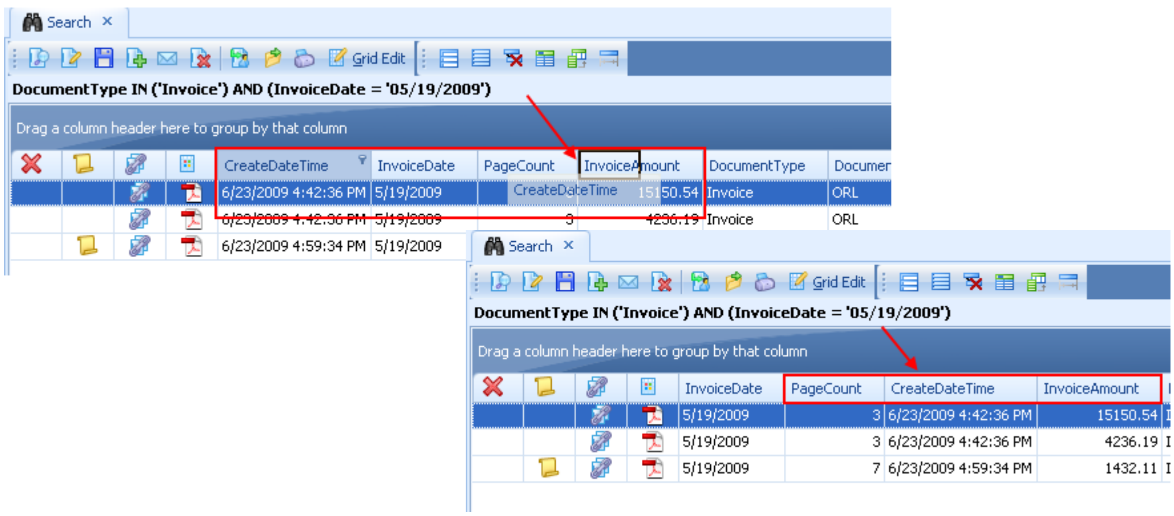

**<u>Note</u>: Documents that are larger than 50MB will not show in the preview pane for performance reasons and instead will display a message asking the user to launch the associated application instead.**

# Column Customization

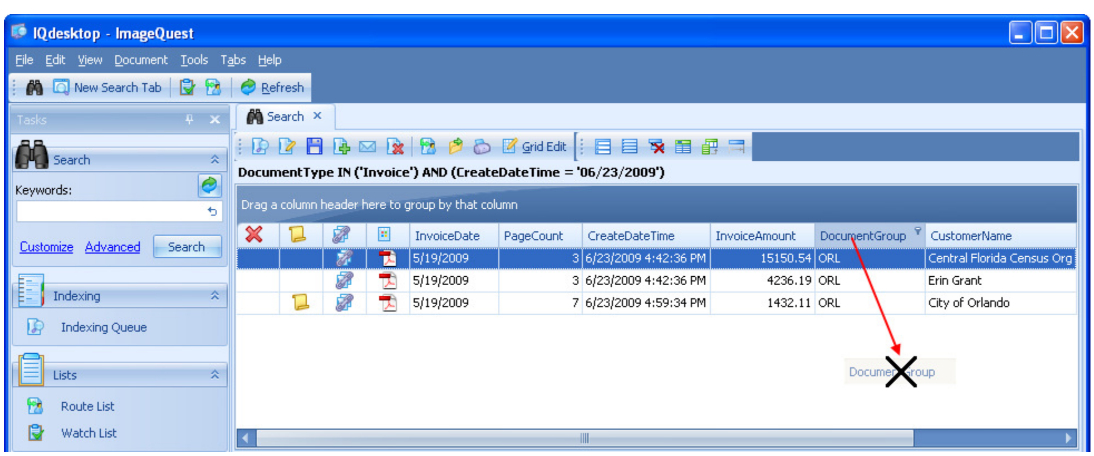
The example below shows a sample of the IQdesktop column headers. The document grid columns may be customized to better meet your needs. Columns can be moved, removed, added, widened or narrowed.




To move a column header, left-click on the column, drag and release it in the header row where the column is desired. For example, CreateDateTime, as shown below, is being moved from its default location to the right, in between PageCount and InvoiceAmount.

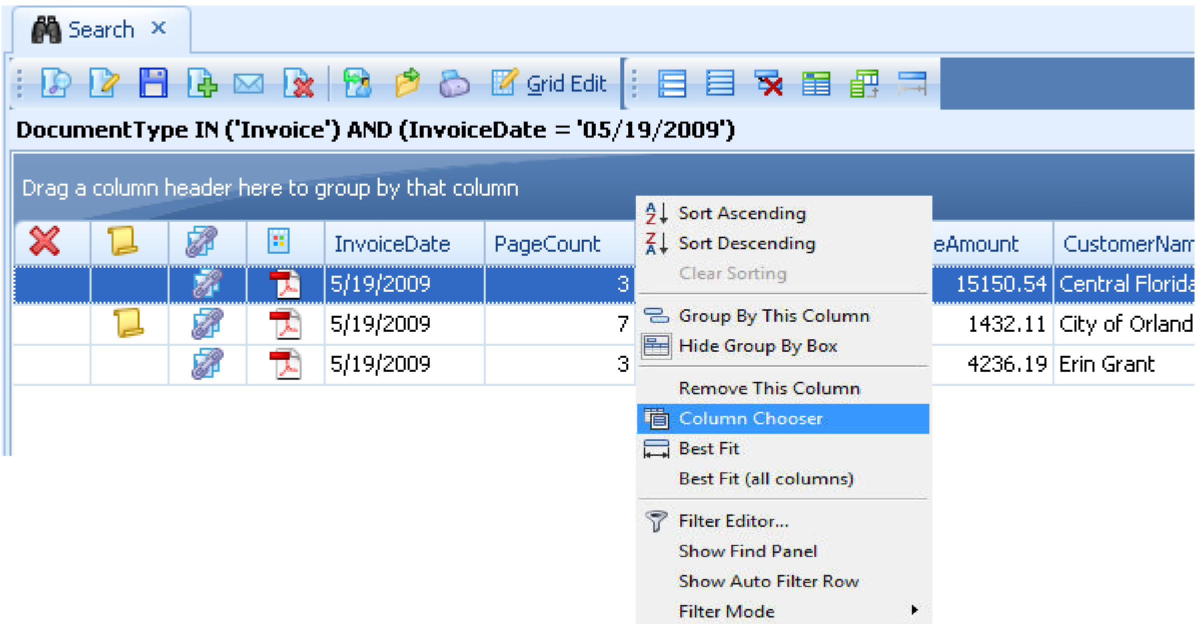



A user can remove a column by left-clicking on the column header to be removed and holding down the left-button to drag the column out of its initial setting as modeled below. An **X** will appear in place of the normal mouse cursor. For example, the column, "Document Group", is being removed from the header.

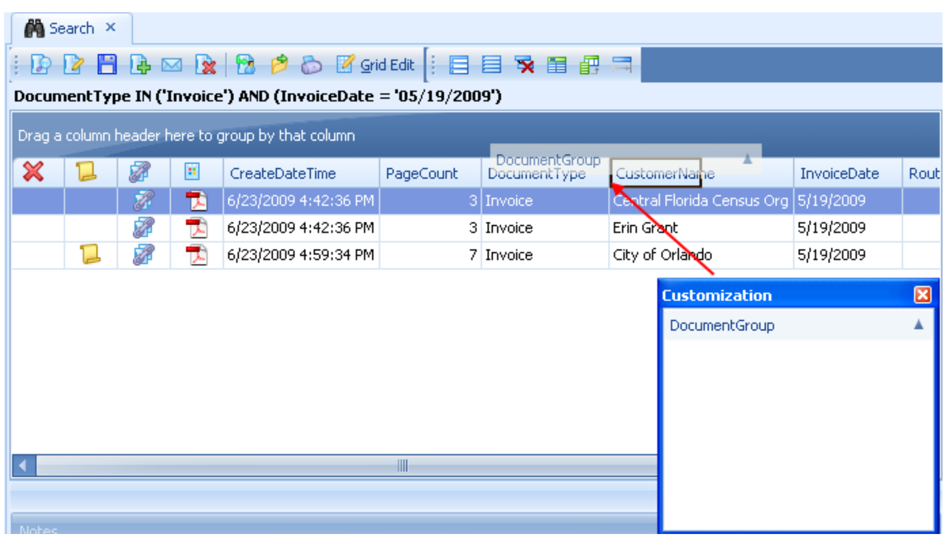


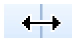
Release the left button to remove the column. The column name is deposited in the "Customization Window" which stores columns that are hidden from the user.

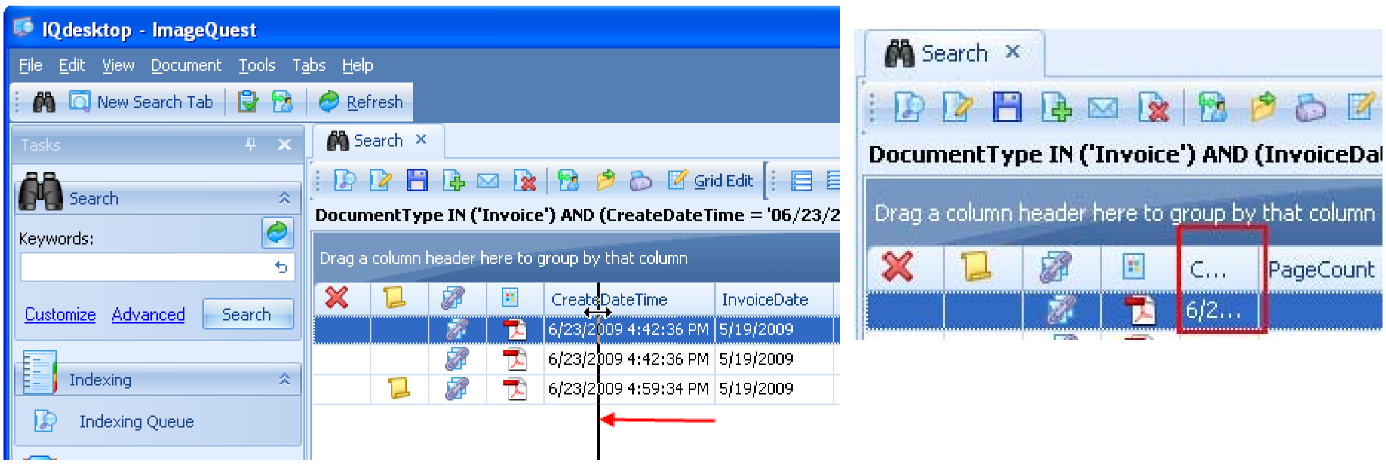
To add a column back to the header, right-click on the header row and select **Column Chooser** from the menu as displayed below.



The "Customization" window will open. As demonstrated below, drag the column name from the Customization window back to the header row by left-clicking on it, dragging it and releasing it. In the example on the following page, the column, "Document Group", is returned to the header.

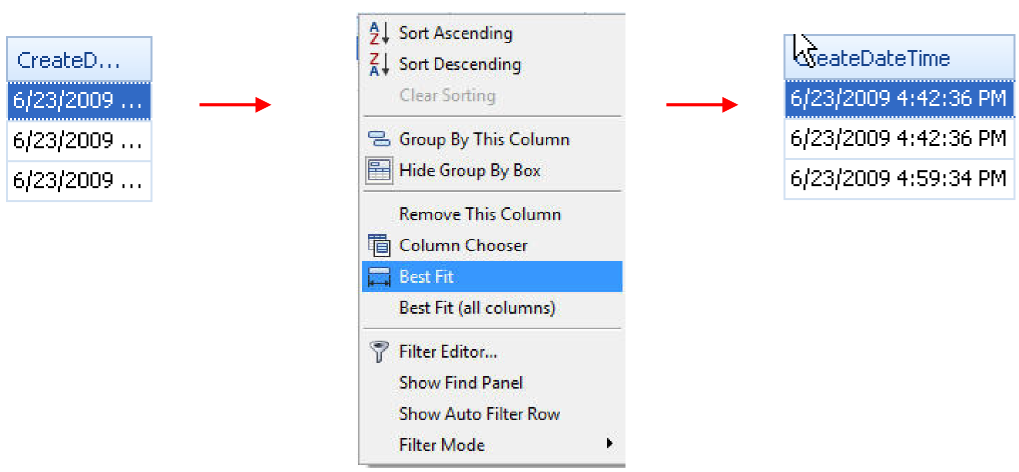


Columns can also be narrowed or widened depending on how much column space you require for any column displayed as demonstrated below.  To narrow or widen a column, position the mouse across the line dividing the two columns until you see  and left-click and drag, moving to the left to narrow or to the right to widen the column; the CreateDateTime column is being narrowed in the figure below.



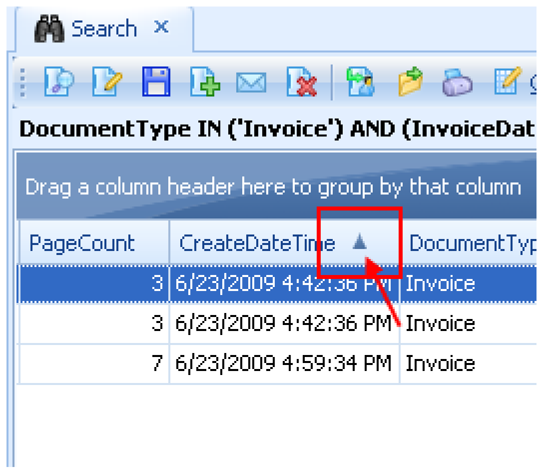

## Best Fit

The **Best Fit** feature automatically sizes a column to fit the maximum length of data in the column at the time of sizing.  To expand a specific column like CreateDateTime to the best fit for viewing, double click between the column headings or right-click on the header row and select **Best Fit** as displayed below.  To expand all the columns at once, select **Best Fit (all columns)** from the right-click header.



## Sorting

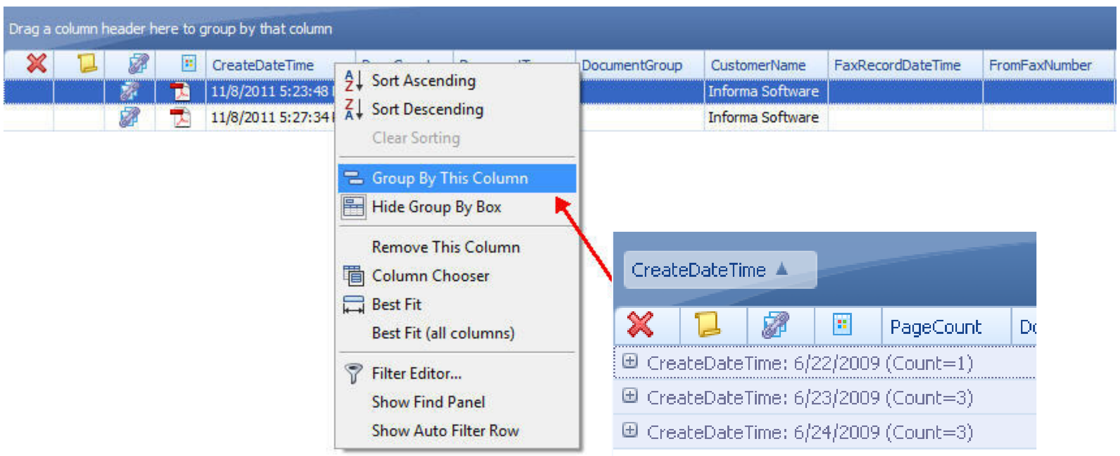
Sorting can be performed on any displayed column in ascending or descending order. There are two ways to define the sort option: 1) click on the header as targeted below to display the results in ascending or descending order; 2) right-click on the column header of the column to open the header menu and select "Sort Ascending" or "Sort Descending". The data in the grid will then be sorted accordingly once you click it. To clear any sorting selection, right-click on the column header and select **Clear Sorting**.



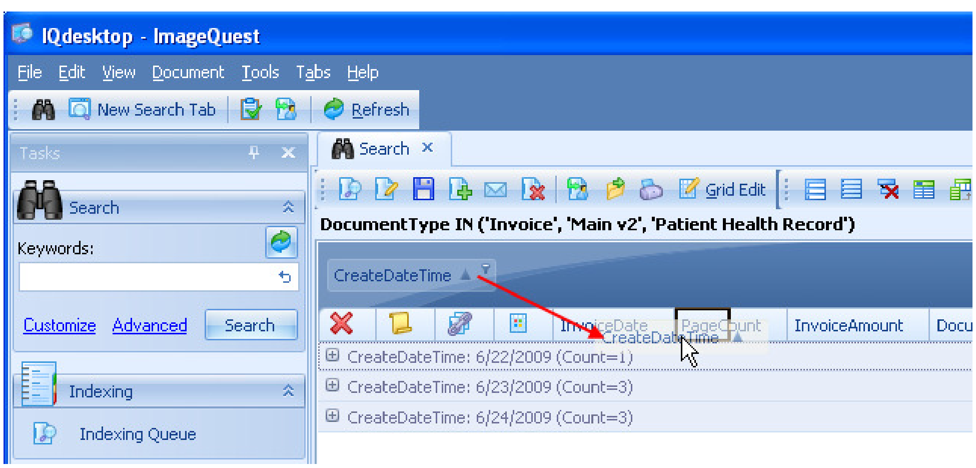

**<u>Note</u>: Multiple columns may be sorted by holding the shift key down while clicking additional column headers, one at a time.**

## Grouping

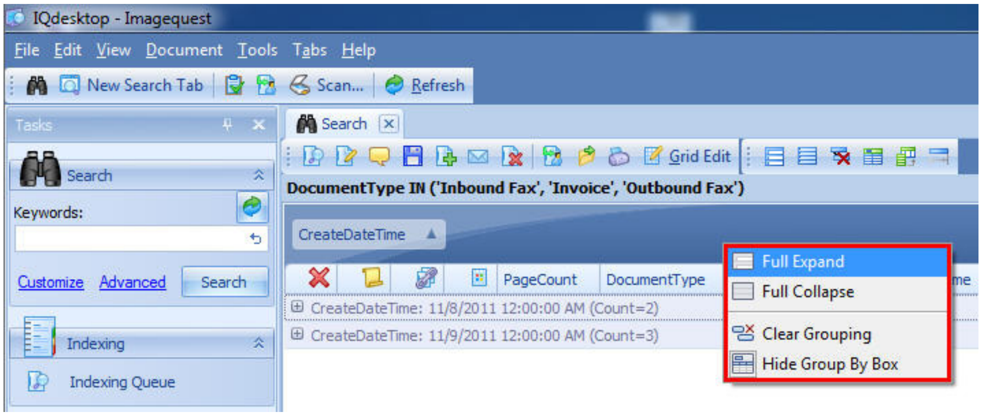
IQdesktop allows for the grouping of one or more columns which allows for a different view of the grid. It also shows a row count associated with each attribute value. There are two ways to group columns: 1) right-click on the column header intended for grouping; this will open the header menu as displayed below. Select **Group By This Column** which moves the column to the **Group By Box** above; or, 2) click and drag a column header to the **Group By Box**. Repeat either grouping method as needed to group by multiple columns.




To ungroup a column, right-click on the column in the **Group By Box** and select the **Ungroup** option, or click and drag the column back to the column header as demonstrated here.



The grid may be fully expanded or fully collapsed by right-clicking anywhere in the **Group By Box** and selecting the appropriate menu item, as seen on the following page.

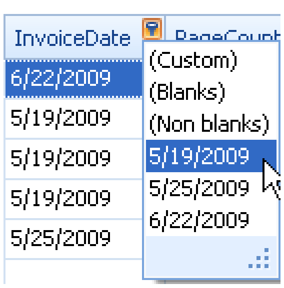


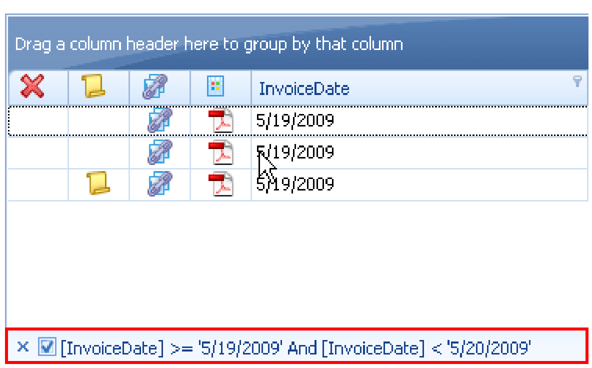

**<u>Note</u>: To clear the contents of the Group By Box, right-click anywhere in the box and select Clear Grouping.**

## Filters

Filters limit the returned search results and help customize a view to easily locate data. One or more filters can be applied to columns currently displayed in the document grid.

To apply a filter to a column, left-click on the drop-down menu arrow on the right-hand side of a column header. As shown below, the drop-down menu will list all of the values currently displayed in the column for convenient selection as a filter. Once a value is selected, the drop-down menu will close and the display grid will show the rows of data that matched the selected value.

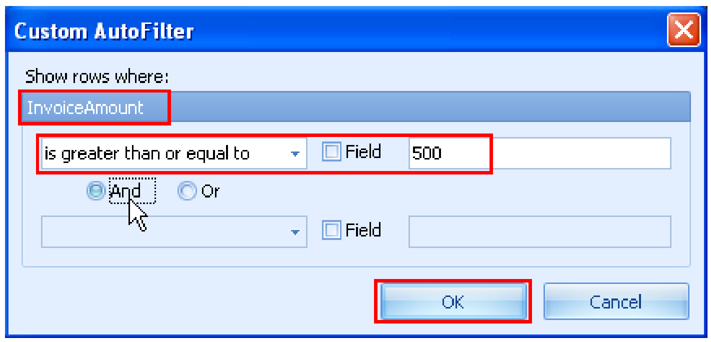



The bottom of the grid now displays the applied filter, '5/19/2009' to the column, "InvoiceDate", as shown above. To cancel the filter, simply click on the  to the left of the filter.

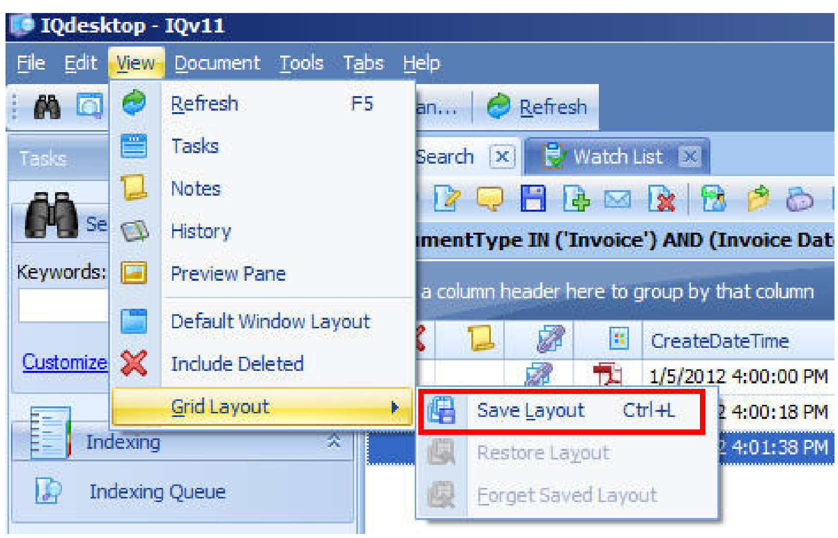
**Note: Multiple filters may be applied to more than one column at a time.**

More complex or versatile filters may be created by selecting the "Custom" option from the drop-down list. The "Custom" option allows the user to create conditions bound by an "And/Or" clause. When "Custom" is selected, the "Custom AutoFilter" window appears as highlighted below. For example, the user selects "is greater than or equal to" and enters a value of 500 to locate documents that contain invoice amounts equal to or greater than $500, yet there are several criteria that can be utilized as you view the entire drop-down menu (i.e. "equals," "does not equal," "is greater than," etc.). Click "OK" to apply the filter.




## Save Layout

Once the grid has been customized to your liking (i.e. column sort order, column removal, column order), you have the option to save the grid layout. To save the grid layout, press **Ctrl+L** or go to the "View" menu as demonstrated below and select, **Grid Layout** > **Save Layout**; the options to **Restore** and **Forget Saved Layout** are not available if there is no saved layout. Once a layout has been saved, you may select **Forget Saved Layout** to delete it and restore the default look.



If you have a saved layout and make changes to the grid during your session, you may select **Restore Layout** to revert back to the saved grid layout.

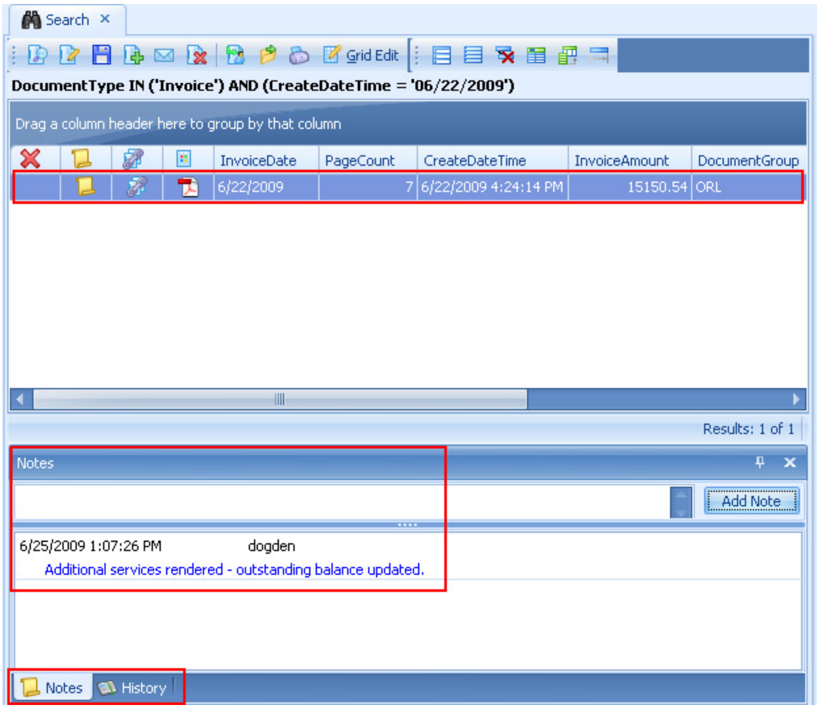
**<u>Note</u>: The "Indexing Queue" grid layout is saved automatically every time the user exits the queue.**

## Updating Documents

After documents have been indexed, users may update or edit attribute data as well as revise individual documents. As these changes are made, they are recorded in **Document History** which serves as an audit trail for administrative review. Reasons for these changes to individual records may be noted in the **Notes** panel for future reference.

### Notes

The **Notes** panel is beneficial to users because it allows for adding comments to a document as illustrated below. For example, the outlined document in this figure has a note. When a note is entered for a specific document, the icon appears in the Note column next to that document. The **Notes** and **History** tabs are located at the bottom of the screen; click the **Notes** tab to view the comments for the highlighted document. This note, 'Additional services rendered—outstanding balance updated' has been entered on 6/25/2009 at 1:07:26 PM by the User "dogden". The **Notes** panel will update automatically as other documents are selected. If the **Notes** panel has been removed from the view, it may be returned by selecting **Notes** from the **View** menu.



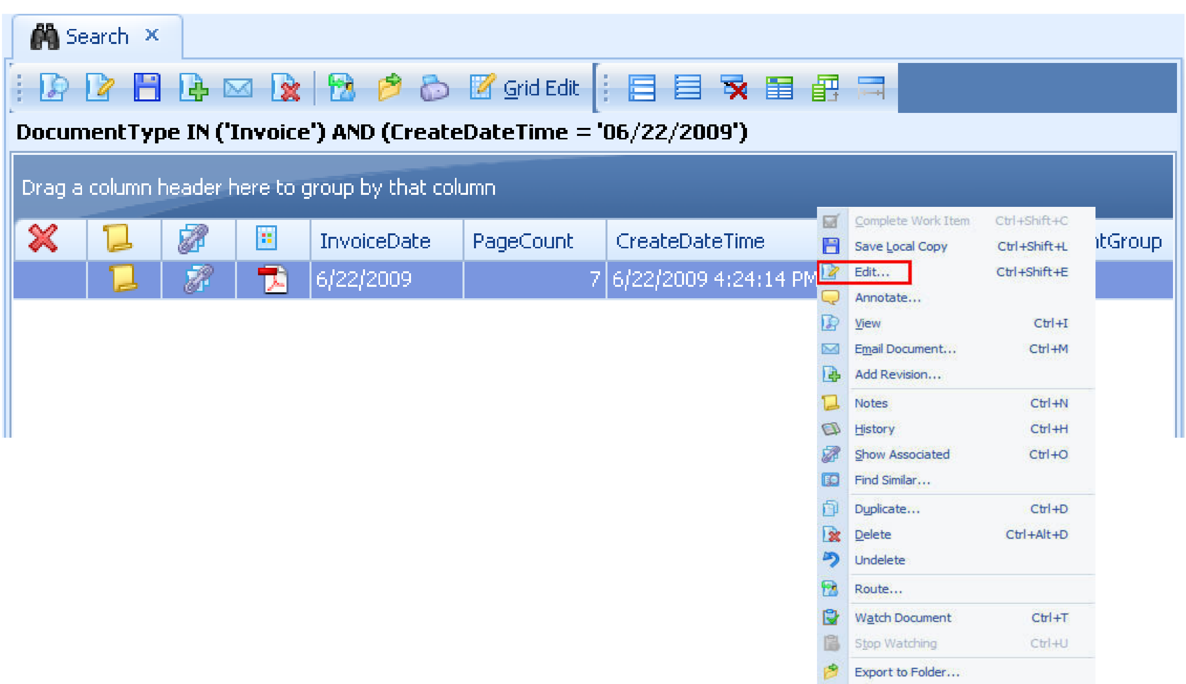
**<u>Note</u>: Once a note is entered, it cannot be updated or changed.**

**<u>Note</u>: Notes cannot be searched.**

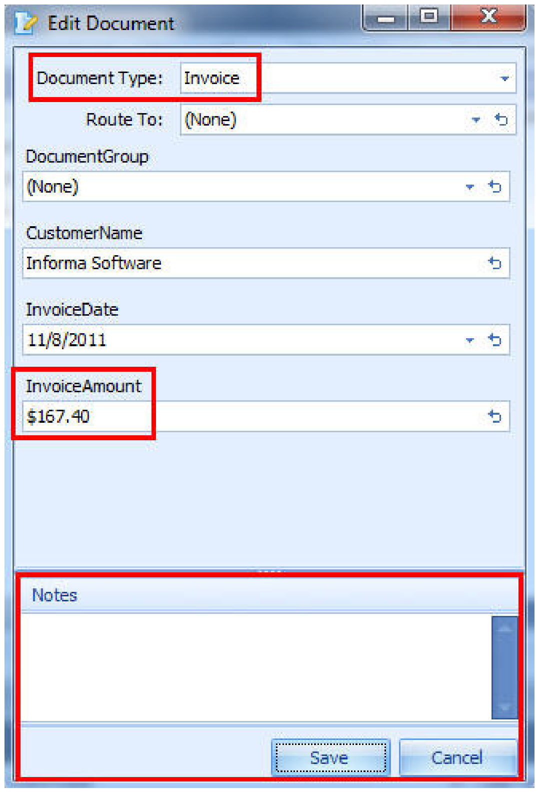
**<u>Note</u>: The "Update Document" permission is required for individual users to add notes.**

## Edit a Document

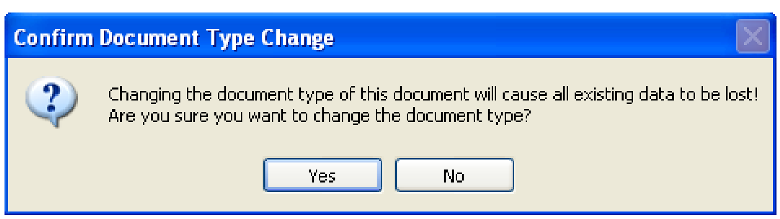
To edit a document, right-click on the highlighted document and select **Edit** from the drop-down menu as demonstrated below. You may also use the toolbar icon or the Document menu.



The "Edit Document" window appears so that changes may be made to the document as illustrated above. The Document Type for editing in this sample is "Invoice". Once the document is updated, click "Save" to save the changes; if the user decides that no changes are necessary, click "Cancel".



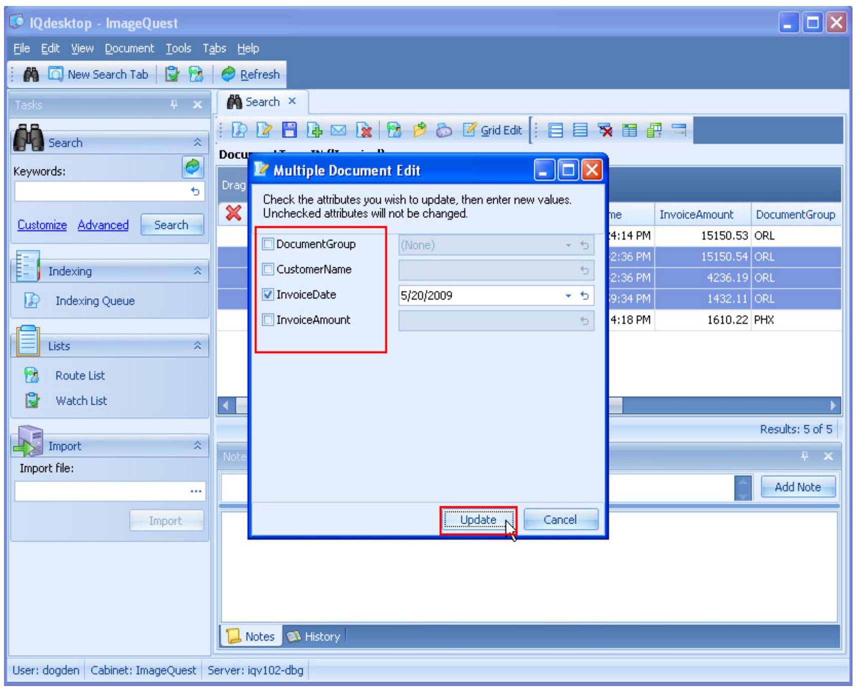

Selecting a new Document Type in the drop-down menu will refresh the screen to display the attributes applicable to the selected Document Type. The window below appears to confirm the Document Type change. Click "Yes" to proceed.



If the new Document Type has attributes that match the original Document Type, the initial data will be retained. Any attributes of the new Document Type that do not match the original Document Type will be empty, and the new information can be entered.

To edit multiple documents, right-click on the highlighted documents and select **Edit** from the drop-down. You may also use the toolbar icon or the Document menu.

When more than one document is selected for editing, only the attributes that are applicable to both documents will appear. Check the box next to the attribute you wish to edit, update the index information and then click "Update" when finished. This will update all the records with the new information. See the sample below.

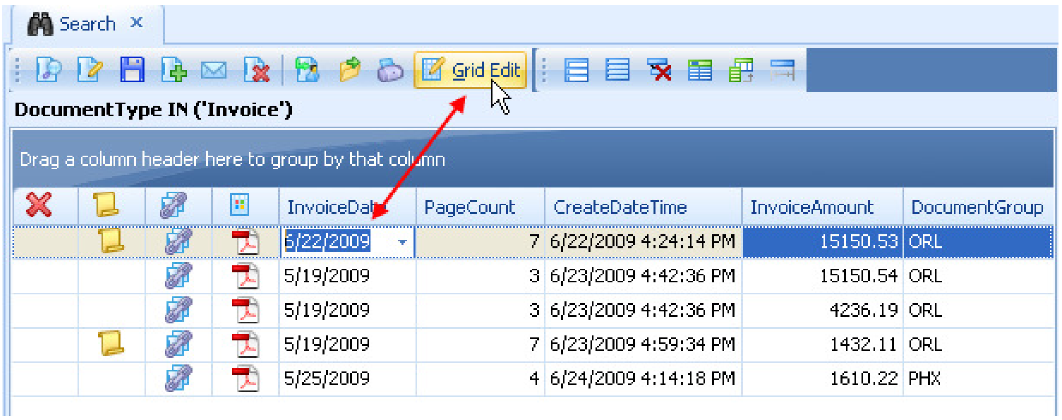



**<u>Note</u>: The Document Type field cannot be changed when using "Multiple Document Edit" and must be edited individually.**

## Grid Edit

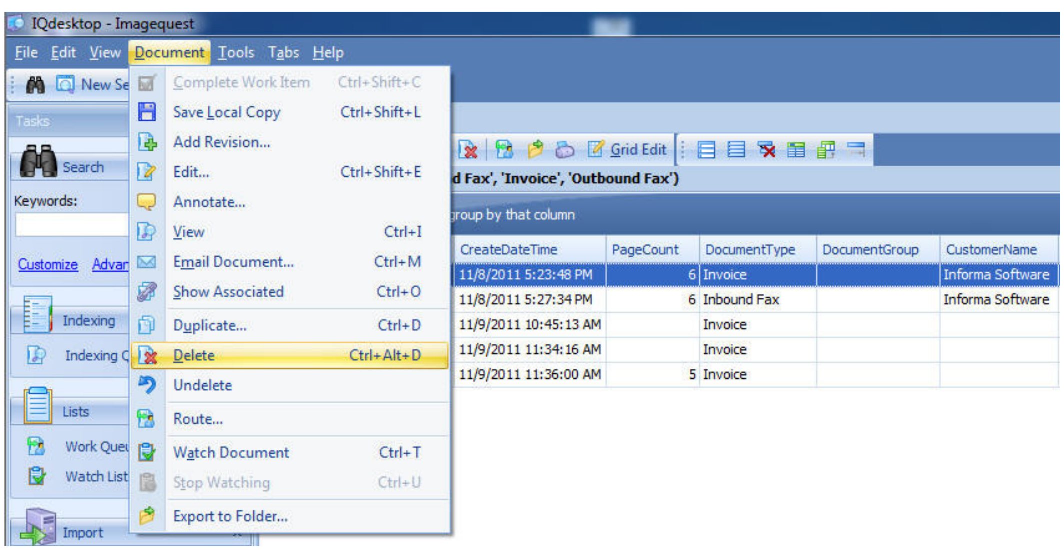
The grid displaying the indexed documents may also be edited directly using 

**(Ctrl+E)** as illustrated below. Toggling the Grid Edit button makes the search grid act much like a spreadsheet program such as Microsoft Excel in that you can type directly into the fields. **Use caution while Grid Edit is enabled as changes are saved automatically once you click off of the document row.** Fields highlighted in gray are either system fields or attributes that are not associated with the document type; these fields cannot be edited.

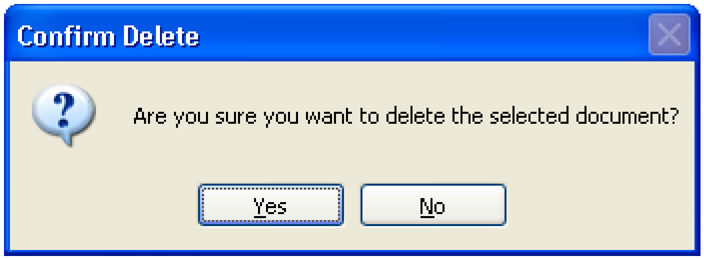



## Delete or Undelete Documents

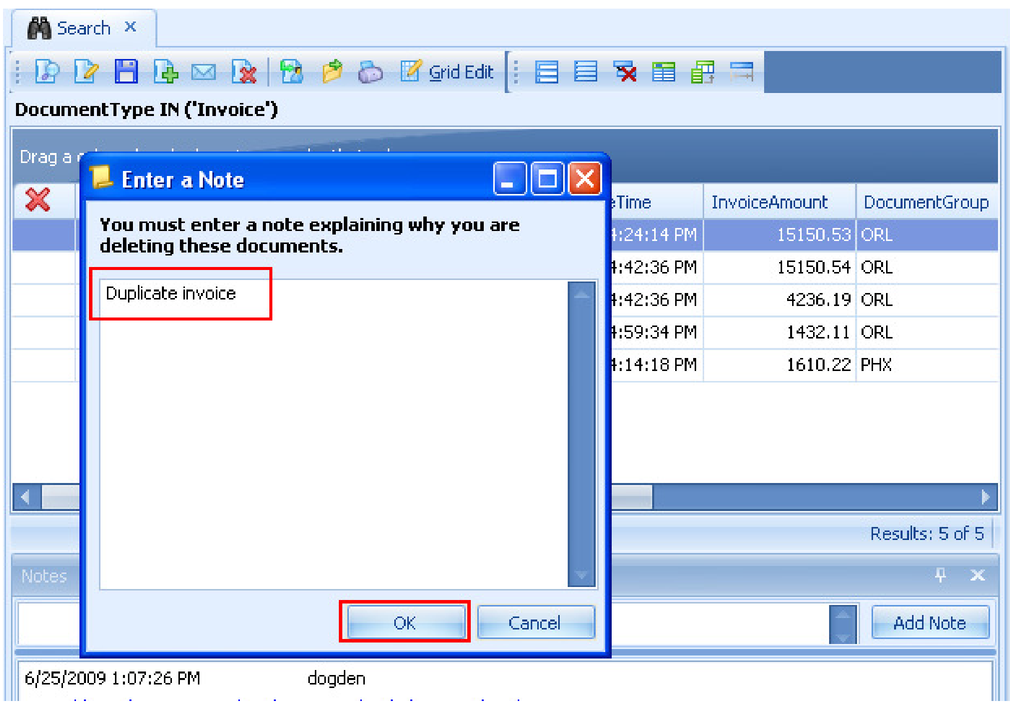
To delete a document, right-click on a record and select **Delete**, or highlight one or more records and select **Delete** from the “Document” menu as demonstrated below.



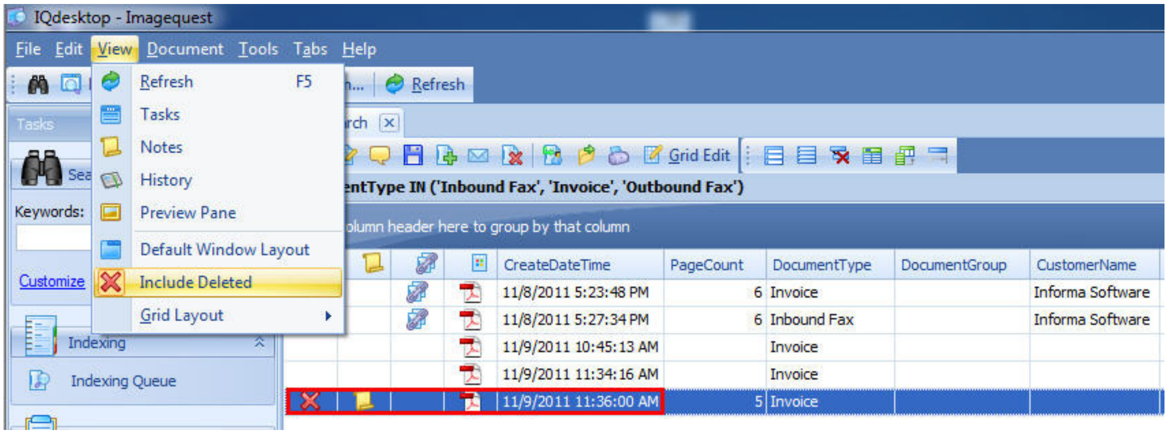
The “Confirm Delete” window appears to ensure that the user desires to delete the selected document as shown on the next page; click “Yes” to proceed.



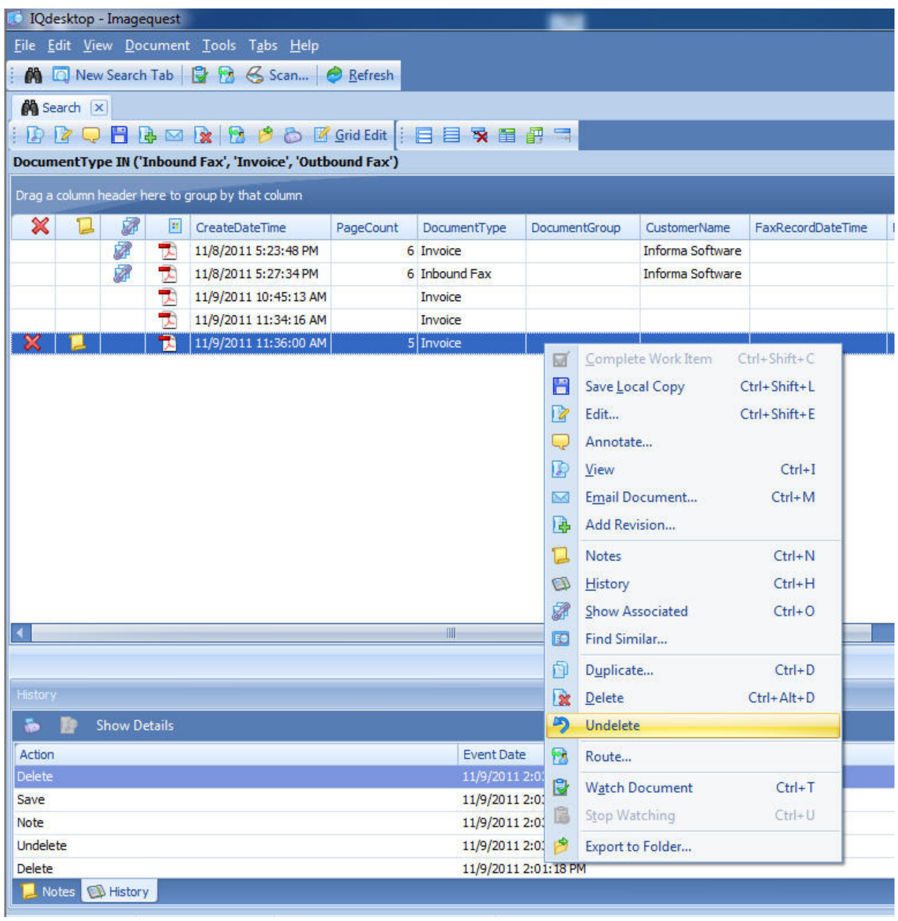

The user will then be prompted to enter a note explaining why the document was deleted as noted below.  For example, this document was deleted because it was a duplicate document in the grid.  Click “OK” to complete the delete process.



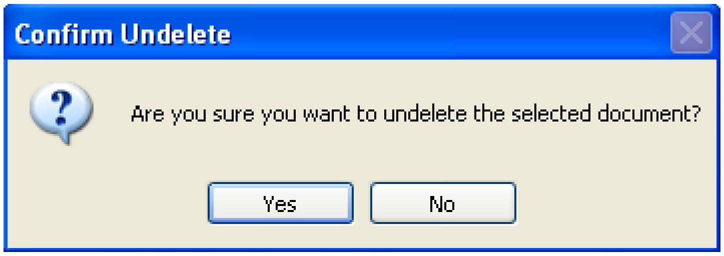

Records deleted from IQdesktop are never actually deleted but are flagged as such, much like the Windows recycling bin.  Selecting “Include Deleted” button from the View menu allows a user to show or hide the deleted documents if he or she has permissions to do so.  Deleted records have a red  at the beginning of the record as shown below.




Selecting "Undelete" from the Document menu, as shown on the next page, removes the red from the record and returns the document to its previous, searchable state.



The “Confirm Undelete” window appears to ensure that the user desires to undelete the selected document as shown here; click “Yes” to proceed.



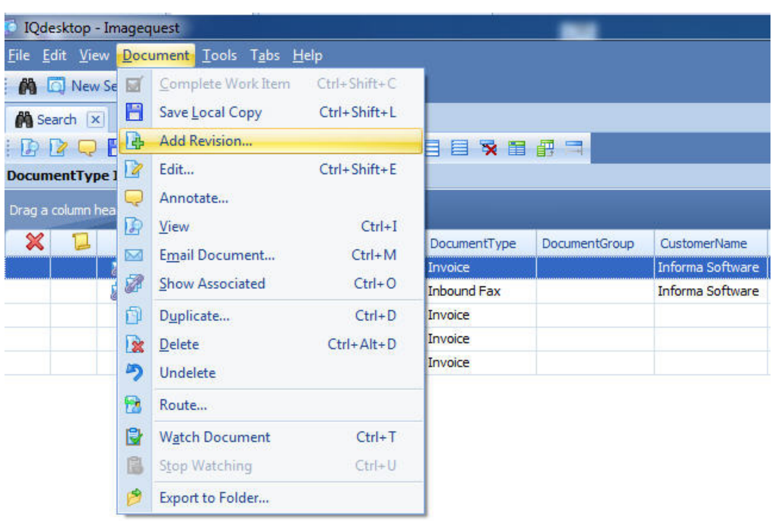

The user will then be prompted to enter a note explaining why the document was undeleted as noted below.

**<u>Note</u>: Users must have the “Delete Documents” permission to delete documents and the “View Deleted Documents” permission to search for and display documents with a “Deleted” status. To undelete a record, users must have both of the permissions listed above. See the ImageQuest Administrator’s Guide for more information.**

## Revising Documents

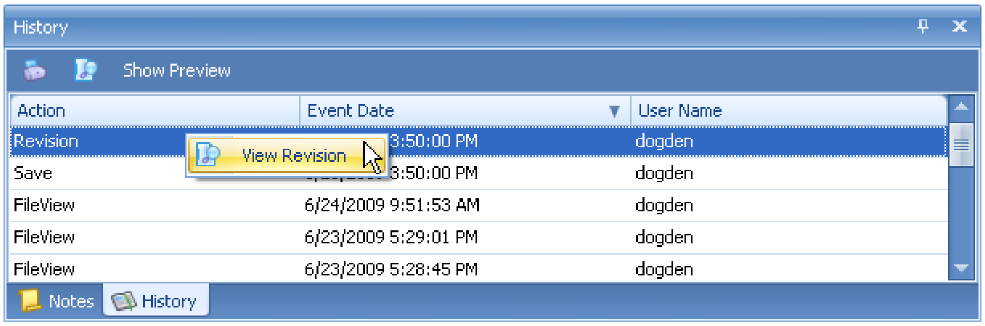
IQdesktop supports the revision of documents so that original files can be replaced with more current files. Original files may still be accessed via the **History** panel (see the following page).

In a “Search” tab, right-click on the highlighted document and select **Add Revision**, or select it from the “Document” menu as illustrated on the following page**.**



After clicking **Add Revision**, the user will be prompted to locate a file to update the current record. The new file will replace the existing file. There is no limit on how many revisions are permitted to a document.

To view previous document revisions, right-click on any of the "Revision" actions in the **History** panel and click **View Revision** as shown below. To see the revision numbers, click the "Show Preview" button.



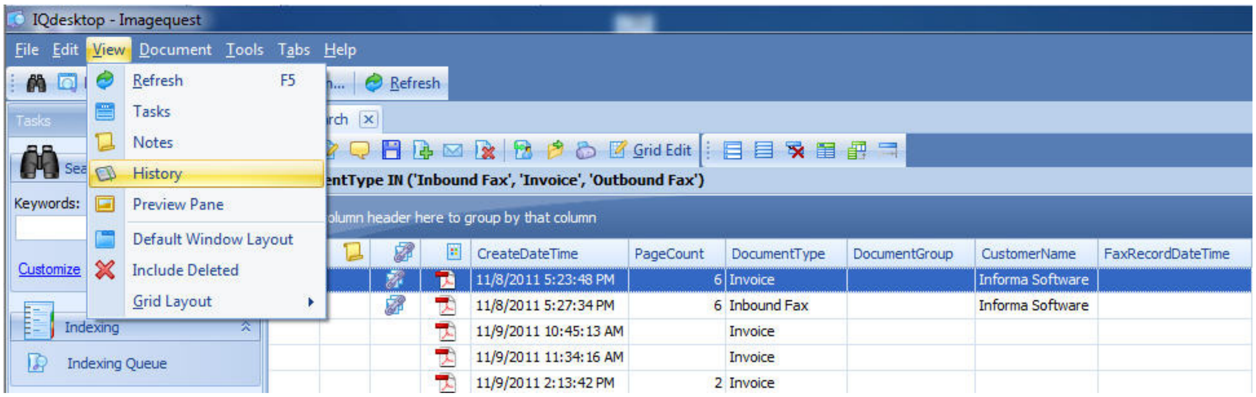

**<u>Note</u>: The file type being revised must be the same as the file type intended to be added, except in the case of .pdf files which may be .pdf or .tif.**

**<u>Note</u>: Documents that are revised will be re-queued for IQocr. Only the most recent revision will be full-text searchable.**

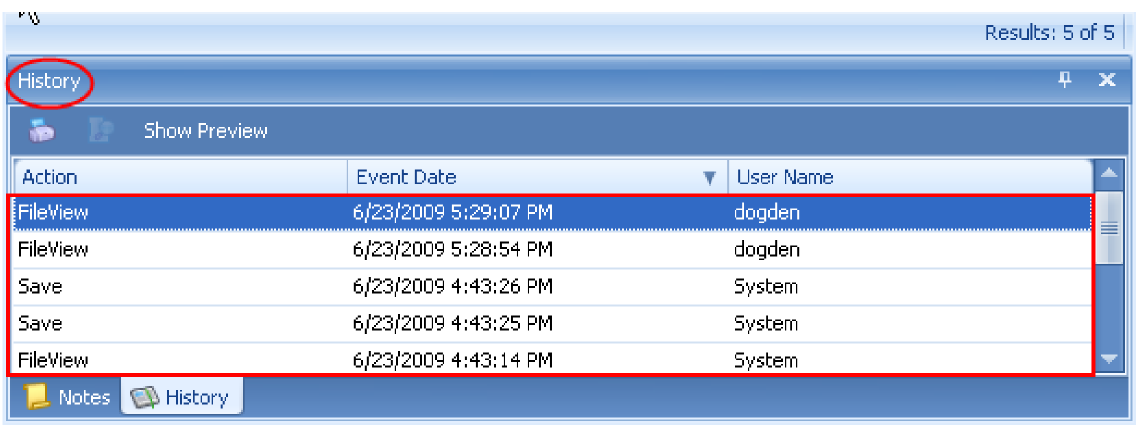
**<u>Note</u>: The "Update Document" permission is required for revising documents.**

## Document History

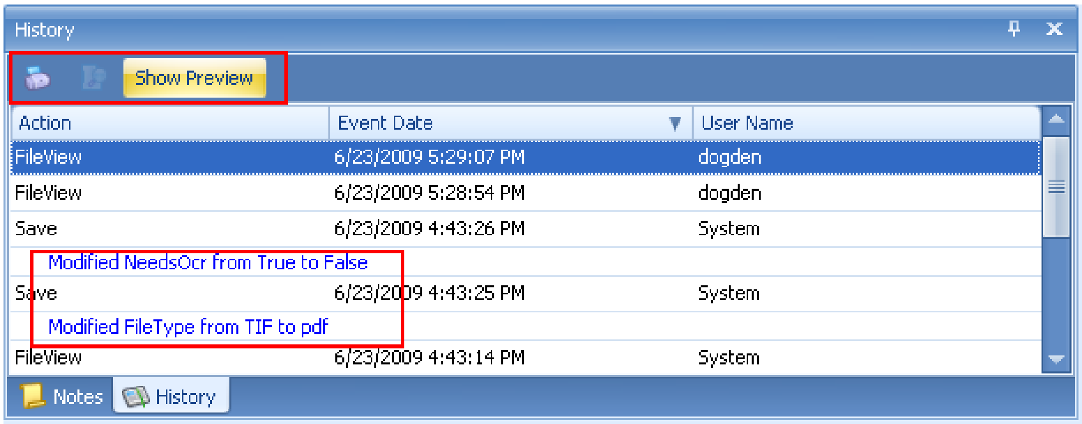
Anything that happens to a document, be it user related or system related, gets recorded into the **History** panel making it easy for someone to see exactly who did what and when.  By default, the **History** panel is located at the bottom of the screen underneath the grid.  Highlight a document and click on the **History** tab at the bottom of the screen to see the **History** panel.  If the **History** panel was previously closed, selecting **History** from the "Document" menu will bring it back as shown below**.**




The **History** panel shows three columns, "Action", "Event Date" and "User Name" as seen in the screenshot below.  These columns can be sorted just like the main search grid.

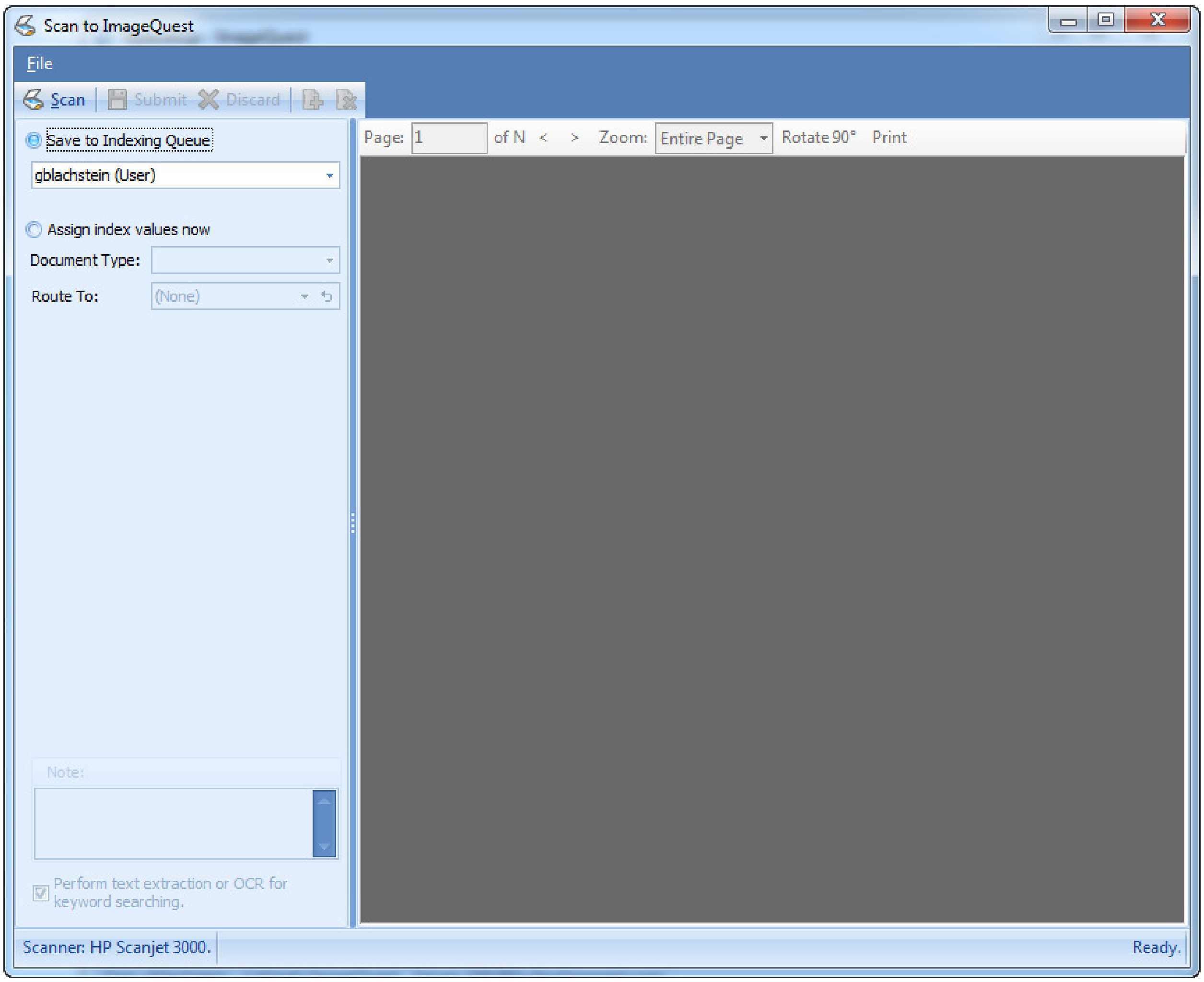


See the screenshot below, which highlights the **History** Toolbar features—"Print", "View Revision" and "Show Preview". The user may print the history of any document, view its revision (if any) or expand the action details to see more information.



## Scan to ImageQuest

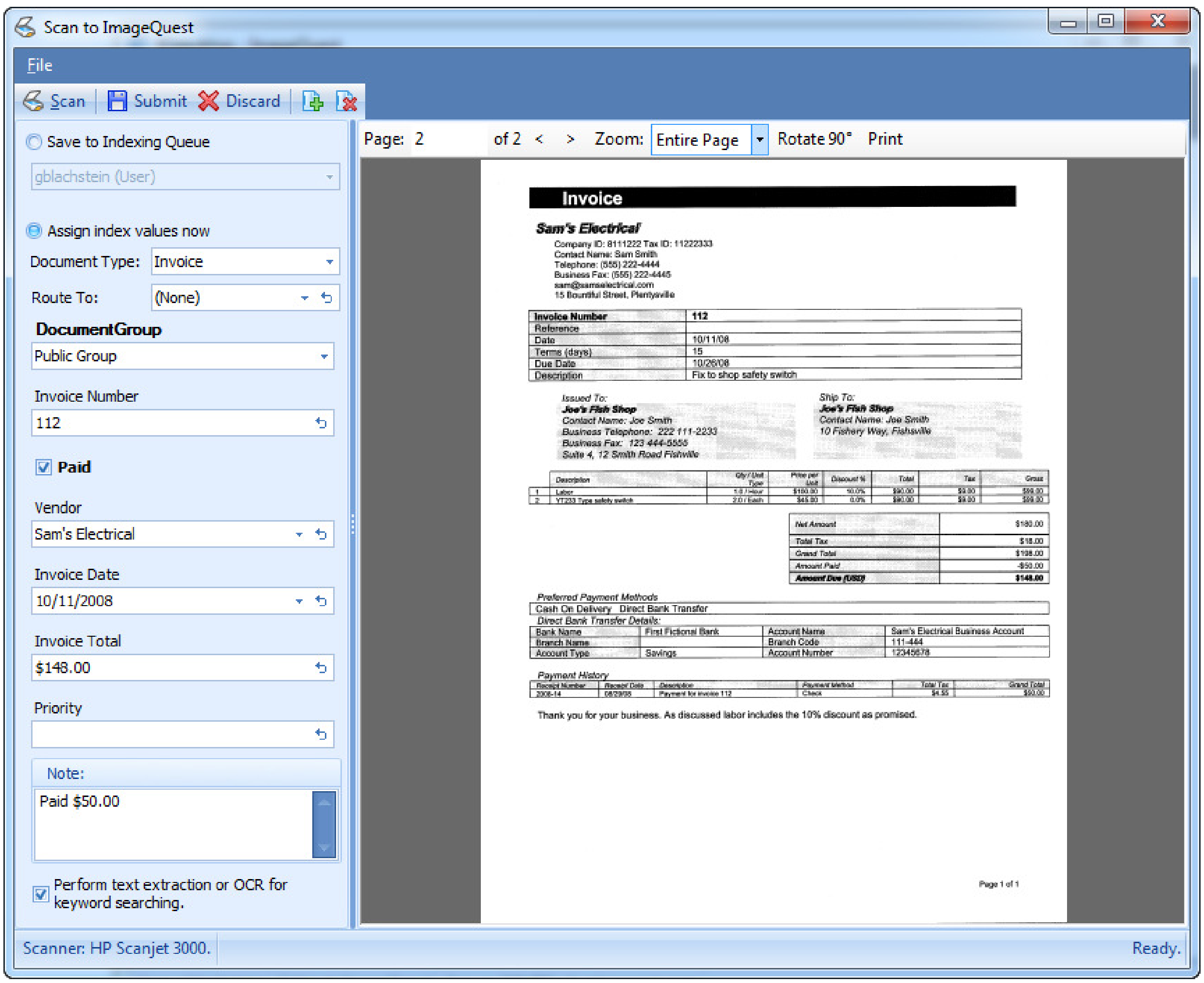
Scan to ImageQuest replaces the IQscan program that shipped with earlier versions of the ImageQuest client and should support any scanner that uses a TWAIN driver. If a user has the "Add Document" permission, they will see a link to the scanning application in the "Tasks" pane of IQdesktop. Clicking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




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

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

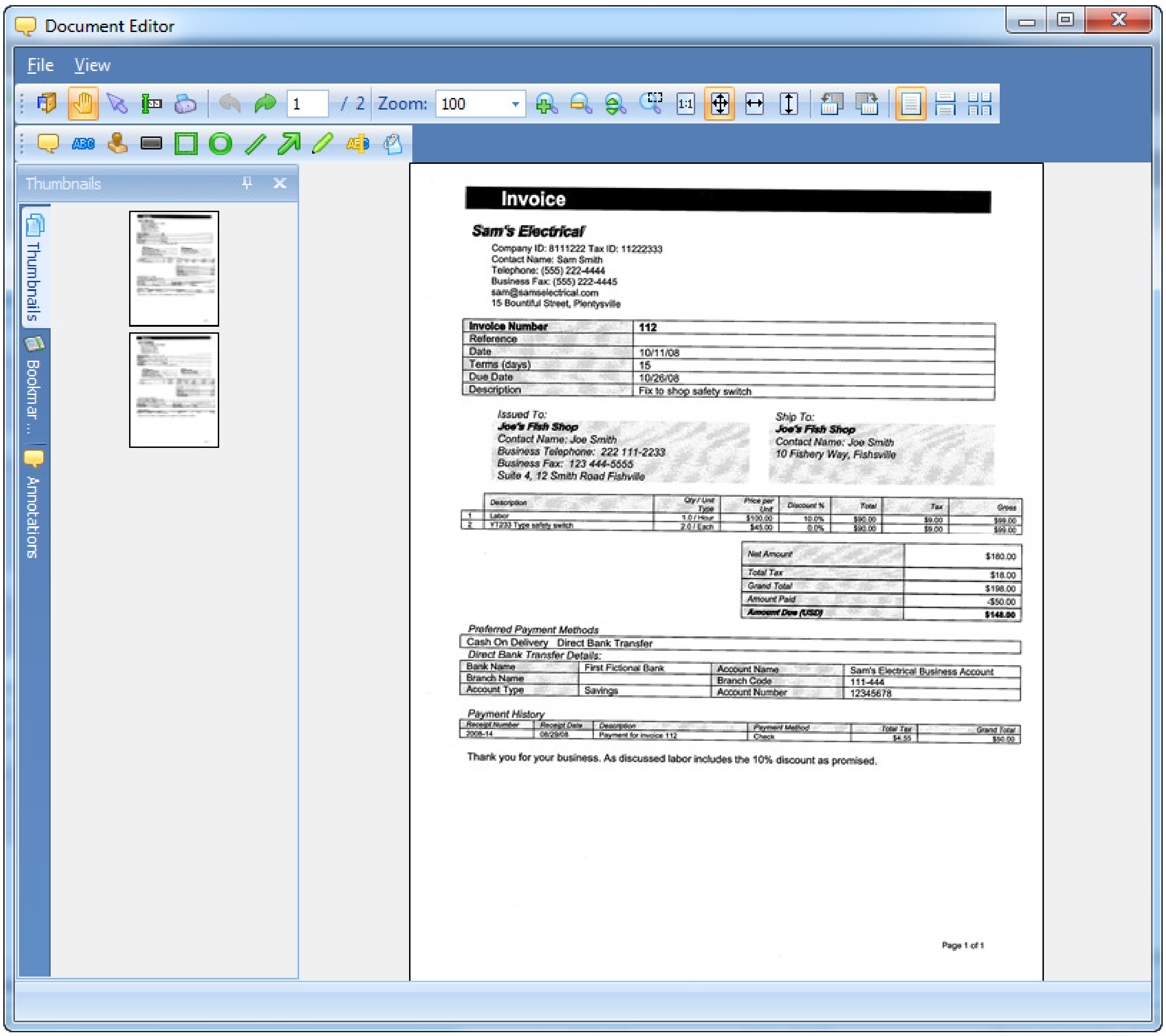
To start a new scan using the default TWAIN driver options, simply click the Scan button in the toolbar. If you need to change the source scanner or to select different scanning options, click on the File menu and select either Select Source or Scan with Advanced Options. After the scan is completed,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




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

# PDF Annotation

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




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

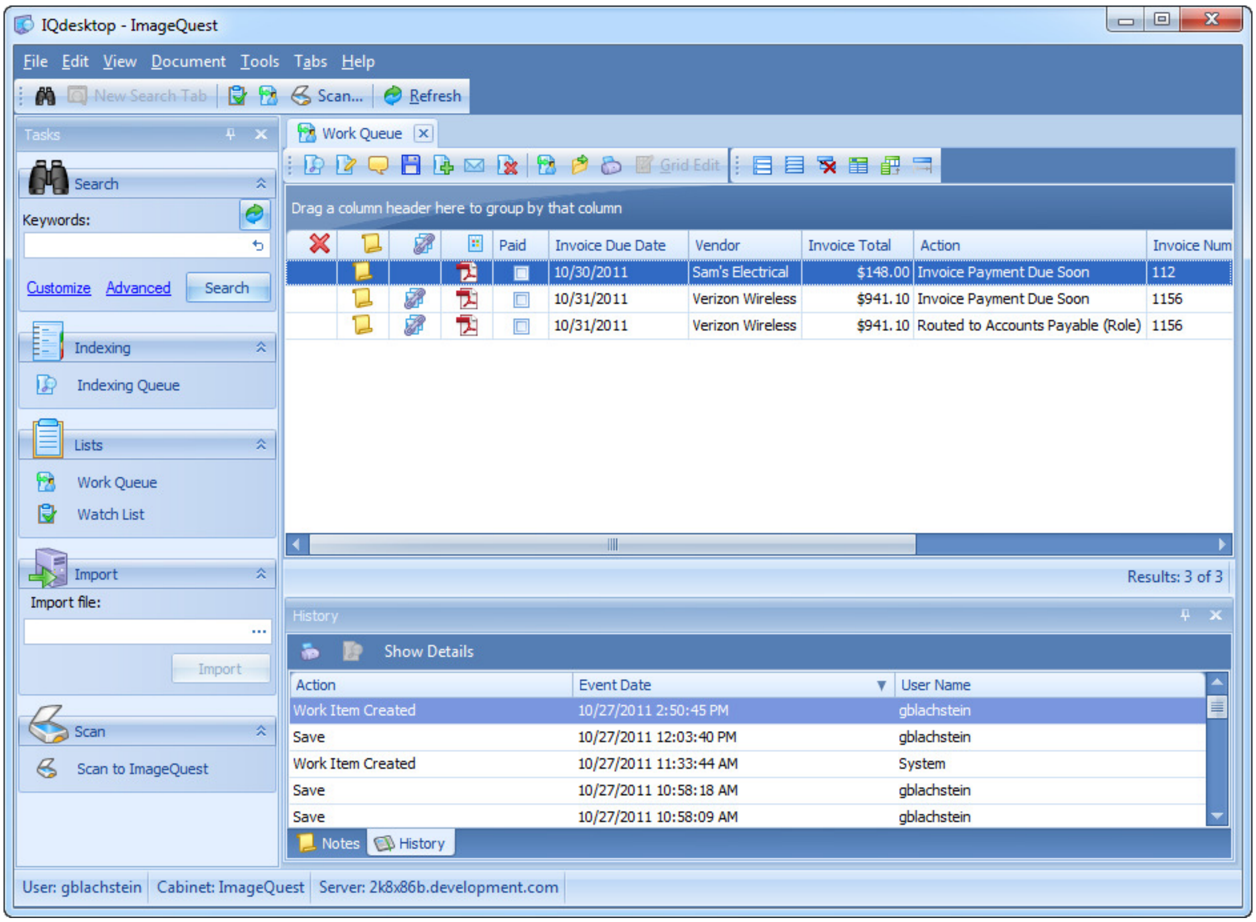
**<u>Note</u>: Annotations cannot be edited nor deleted once the document has been saved.**

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

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

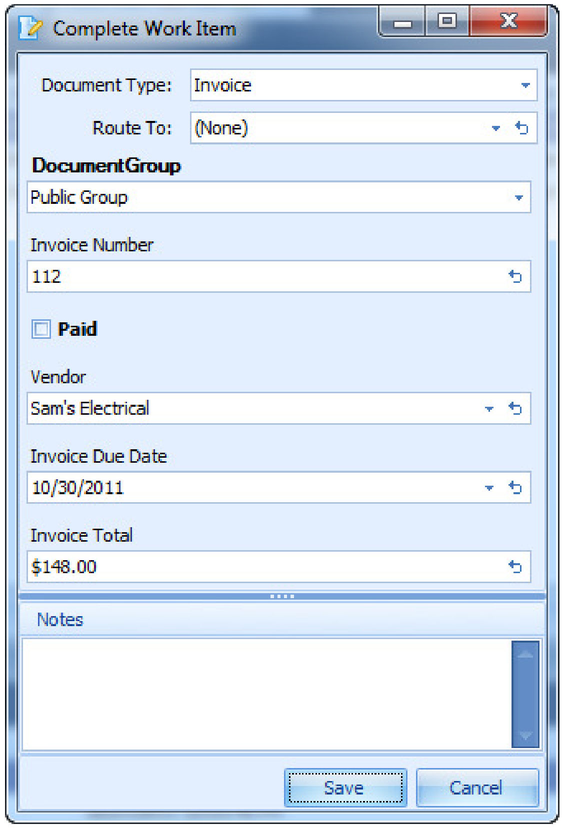
# Work Queue

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




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

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




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

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

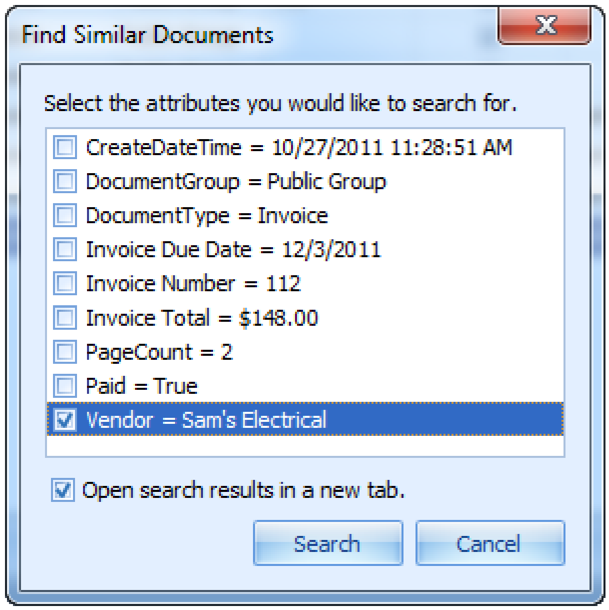
There is a special column in the Work Queue called "Action" that shows how the document arrived. It will either show the name of the notification rule that was responsible for routing the document, or it will display a message that indicates it was manually routed to a specific user or role.

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

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

# Find Similar Documents

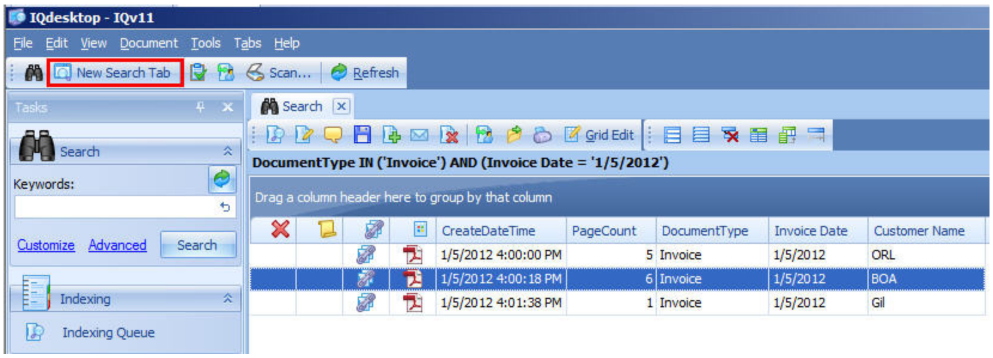
Find Similar provides an easy way to perform searches based on the results of a previous search query. For example, a search is performed which returns a list of paid invoices for the current month. What if a user wants to search for all invoices from a particular vendor that are displayed in the search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



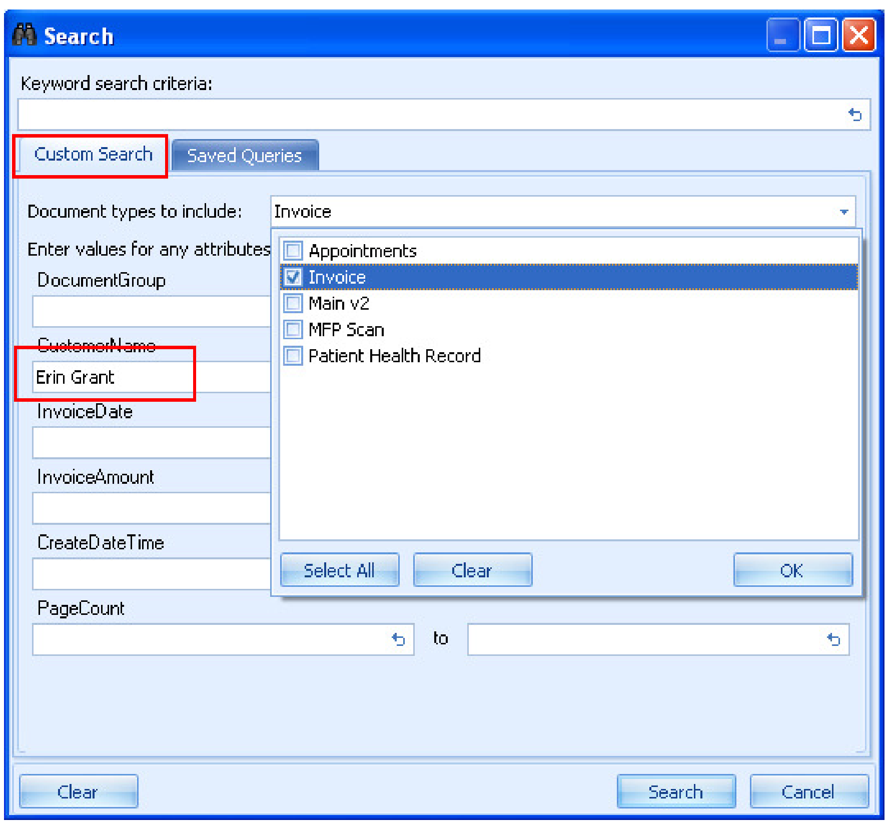

Notice that “Vendor” has been automatically checked. If the user had right-clicked on the “Invoice Number” cell, that field would have been checked by default instead. Clicking the search button at this point would do a new search where “Vendor” is equal to “Sam’s Electrical”. Additional attributes can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

## New Search Tab

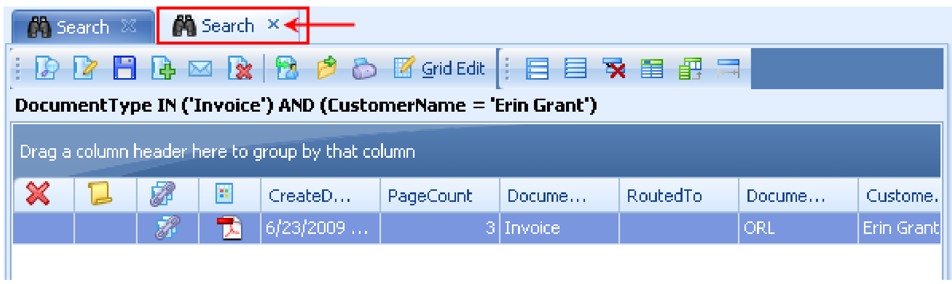
The **New Search Tab** is beneficial to the user if they are managing two or more searches concurrently. A user may open a **New Search Tab** by clicking the "New Search Tab" button in the toolbar as highlighted below.




Once the **New Search Tab** is selected, a "Search" window appears to initiate a new search via "Custom Search" or "Saved Queries" as illustrated below; in this figure, for example, the new search is initiated via the "Custom Search' for an Invoice with the customer name "Erin Grant". Click "Search".



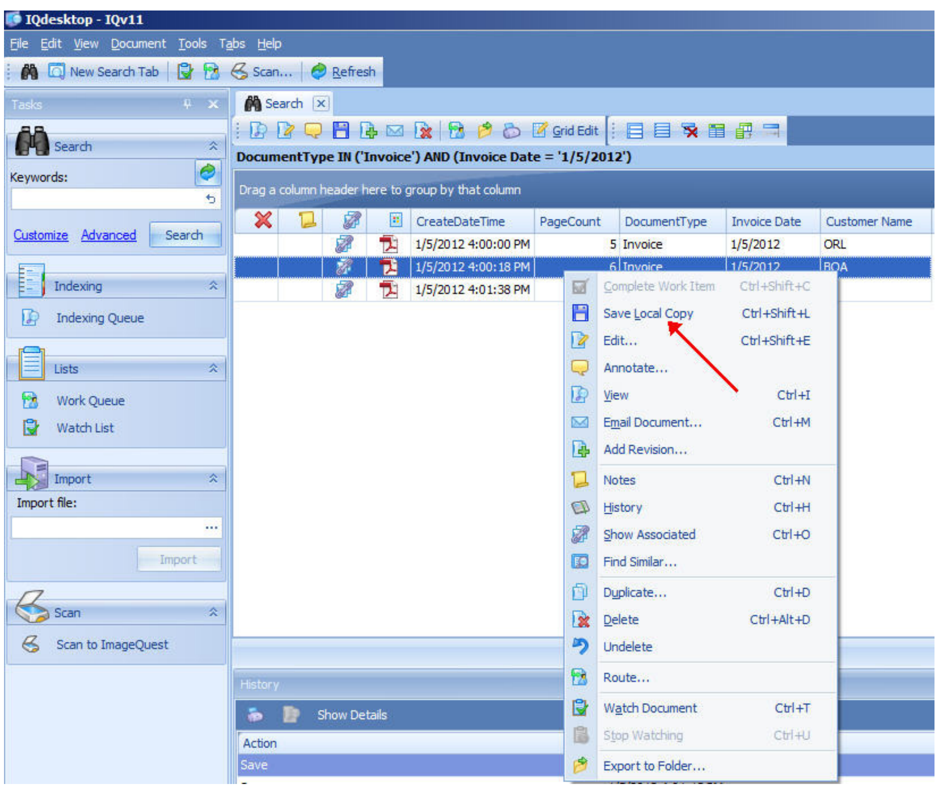
The new search results are displayed in a new search tab as illustrated here. The user may switch between the tabs to view the different search results. Currently, an unlimited number of search tabs may be open. To close a search tab, click the ✕ button as highlighted below.




## Save Local Copy

"Save Local Copy" allows IQ users to save documents from IQdesktop to their client PC or a network location.

To save a local copy, right-click on a document and select "Save Local Copy. A Windows "Save As" dialog will open and the user can then save the document to the desired location.

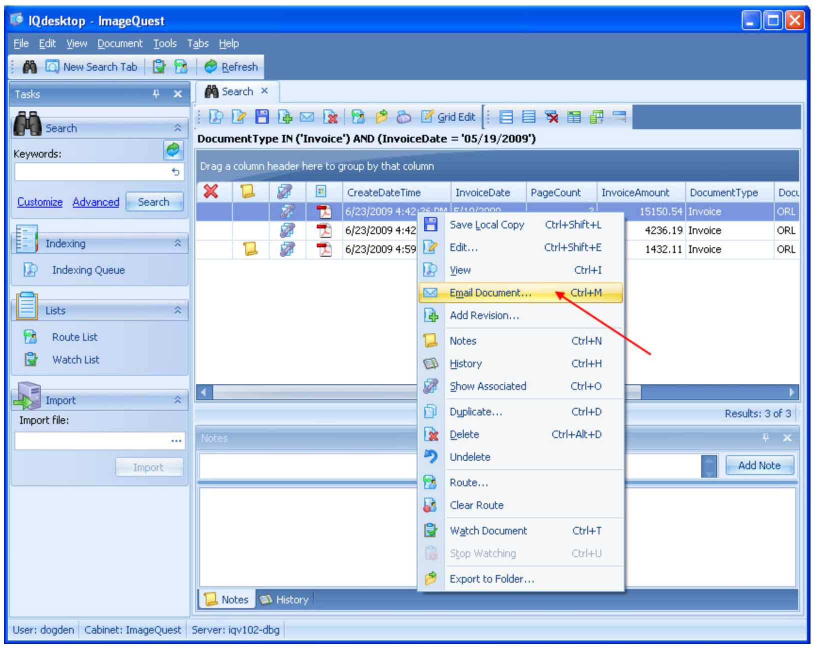


**Note: Save Local Copy supports single document saves. Please use Export to Folder for multiple document saves if required.**

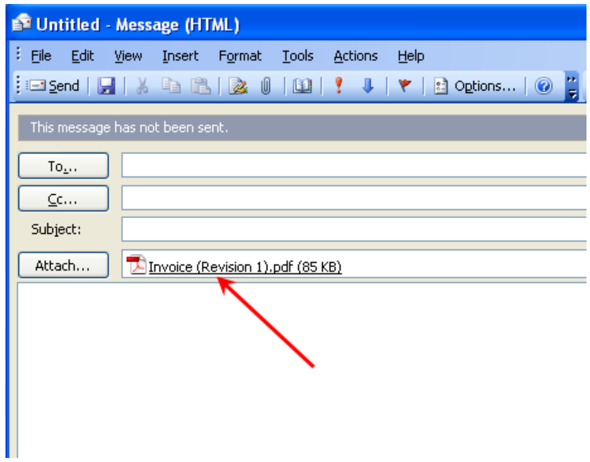
## Email Document

"Email Document" allows users to email IQ documents as attachments using their default mail client.

To email IQ documents, right-click on the selected document(s) and select "Email Document". See below.




The default email client will open a new window with the selected document(s) attached. The screenshot below shows an Outlook Express message with "Invoice (Revision 1).pdf" as the attachment. The user can now complete and send the message with the IQ document attached.

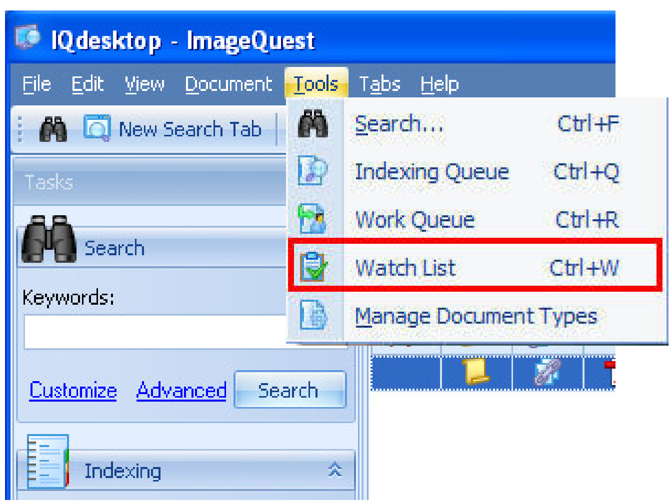



**Note**: **Email Document requires a compatible MAPI client (i.e. Outlook, Outlook Express) to function.**

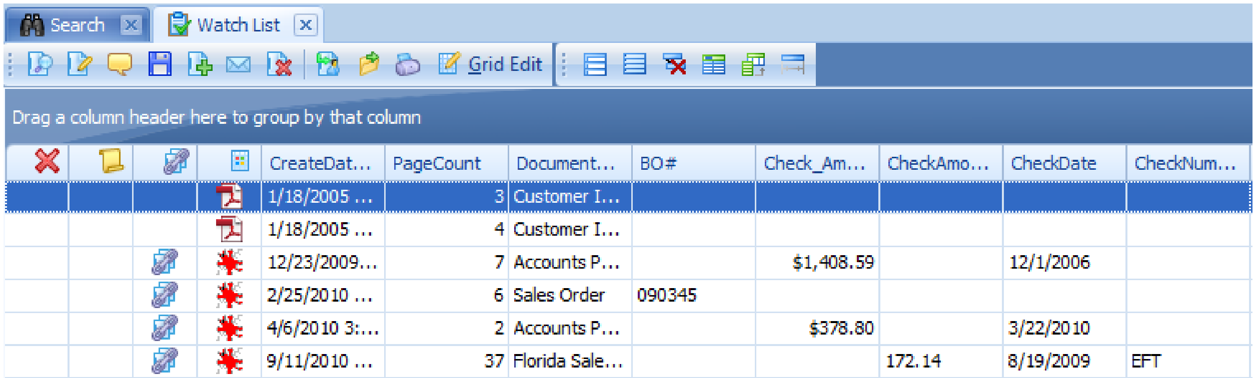
## Watch List

The purpose of the **Watch List** is to bookmark a document for future reference instead of having to search for it again. To watch a document, highlight it and select "**Watch Document**" from the right-click menu or from the "Document" menu.

The "**Watch List**" may be accessed from the "Tasks" pane or from the "Tools" menu as demonstrated below**.**




The **Watch List** opens in its own tab as shown below and is specific to each user.

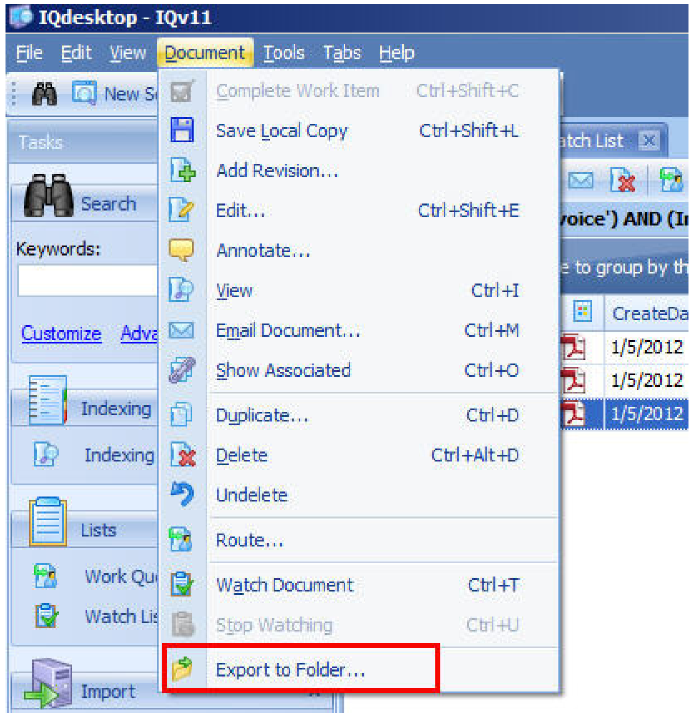



To stop watching a document, select **Stop Watching** from the "Document" menu or from the right-click menu.

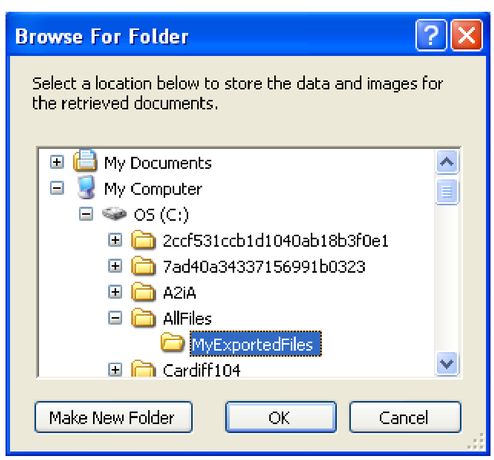
## Export to Folder

The **Export to Folder** feature allows documents selected in IQdesktop to be exported to a folder on the user's PC; an HTML page with searchable metadata is also created. The user can then manually copy them to removable media if necessary. This creates portability for the set of documents selected for reference outside of IQdesktop.

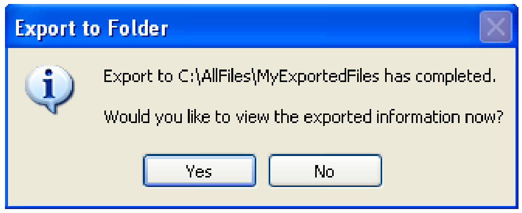
Only the documents selected in the current grid will be flagged for export. Hold down the CTRL key while clicking individual documents to select individual documents or press CTRL+A to highlight all of the documents in the grid. Once all the documents have been selected, go to the "Document" menu and select "**Export to Folder**" to export the selected documents to a folder as demonstrated below.



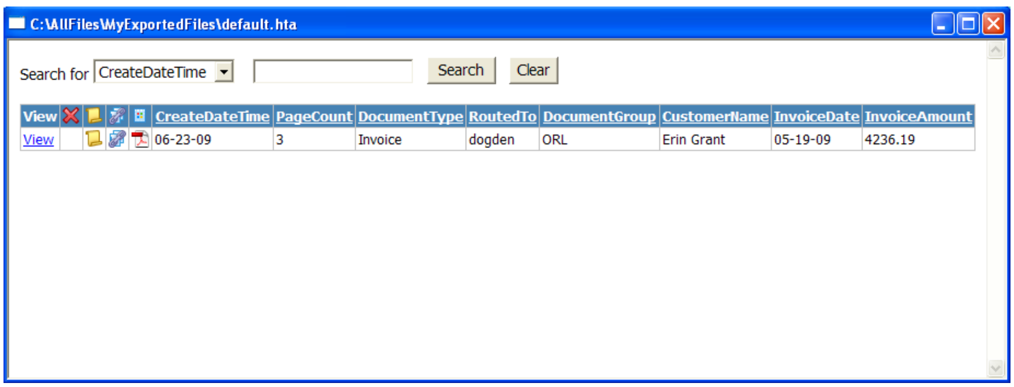

The "Browse for Folder" window appears allowing the user to either select an existing location, or to create a new folder. In the screenshot below, selected documents will be exported to "C:\AllFiles\MyExportedFiles" folder. Click "OK".




The selected documents have now been exported to the "C: \AllFiles\MyExportedFiles" folder as noted below. Click "Yes" to view the exported information.



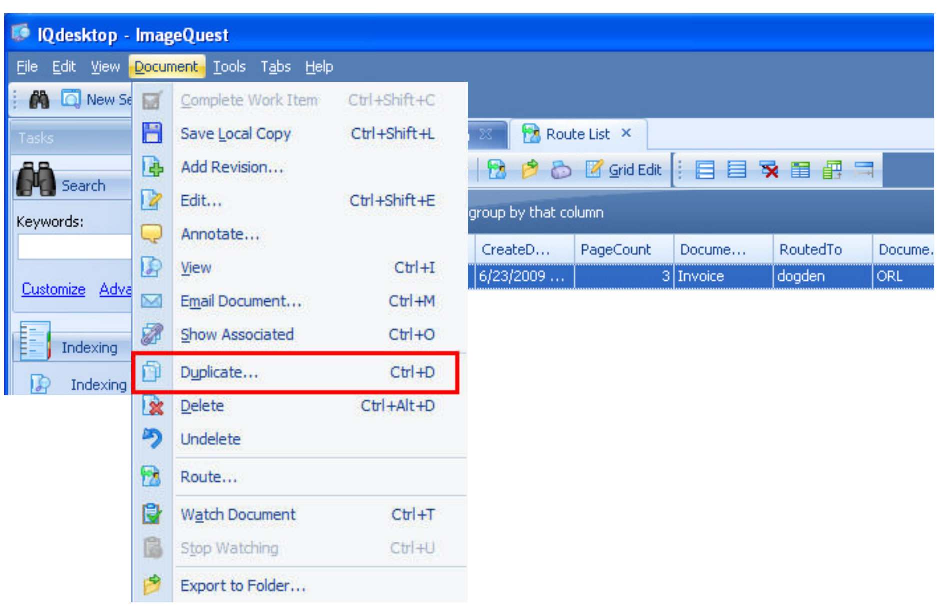

The window below displays the exported documents in a searchable html file (default.hta). Click the "View" hyperlink to view the documents in their native viewer.



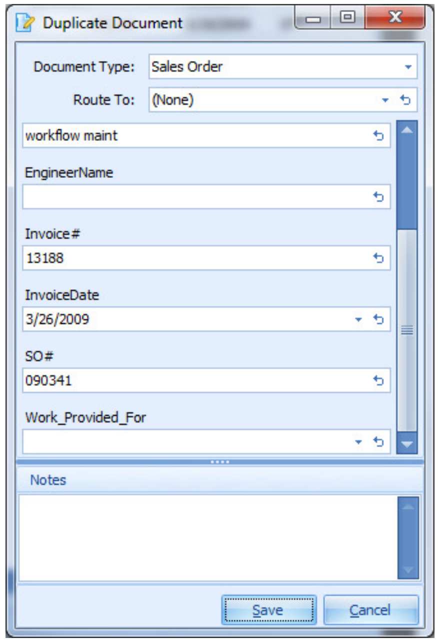

**<u>Note</u>: Searches performed from the default.hta file are case sensitive.**

## Duplicate

To create a duplicate copy of a record, highlight the record and select **Duplicate** from the right-click menu or from the "Document" menu as illustrated below.



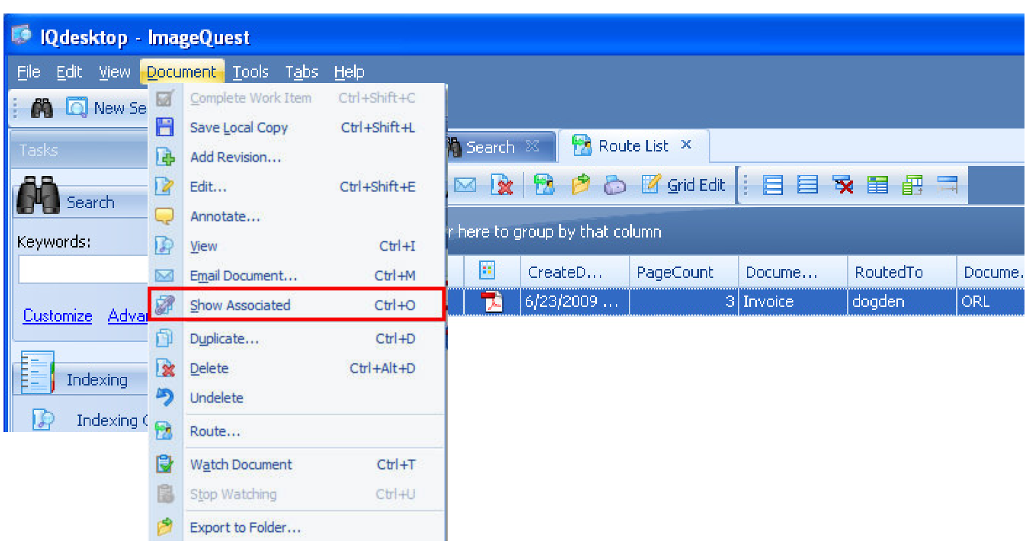
The **Duplicate Document** window will open as shown. The duplicate record Document Type and attributes may be edited before clicking "Save".



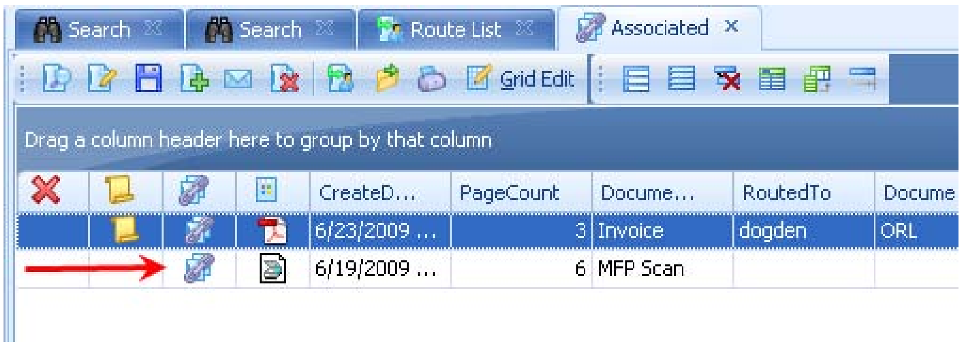

**<u>Note</u>: Users must have the "Add Document" permission to create duplicate records.**

## Show Associated

When documents are scanned into the Indexing Queue, they arrive with a document type of "MFP Scan". After a document batch has been indexed, it may be useful to see the original scanned batch. To show the original MFP Scan document batch, select **Show Associated** from the "Document" menu as displayed.



All associated documents, if any, will appear in their own tab. Associated documents display the icon next to them as shown below.



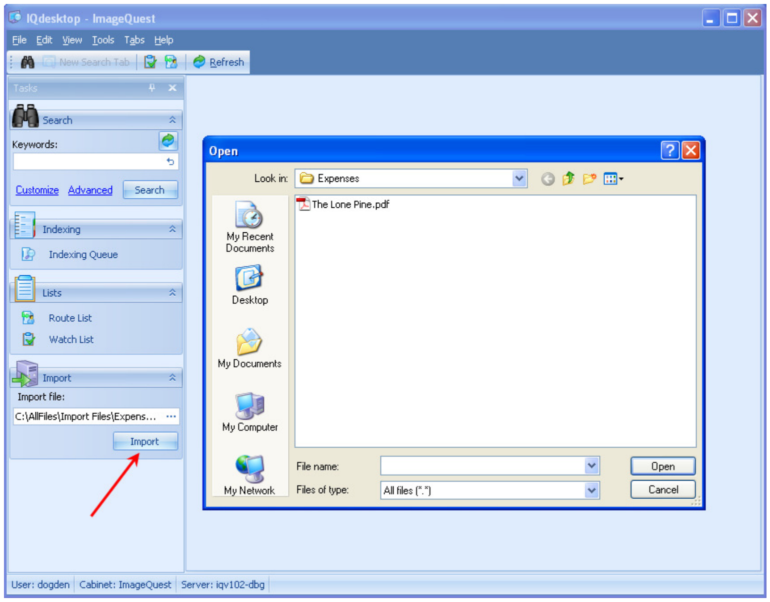

**<u>Note</u>: Users must have Allow access to the "MFP Scan" document type in order for them to appear as associated documents.**

**<u>Note</u>: Duplicate records are also linked together by using "Show Associated".**

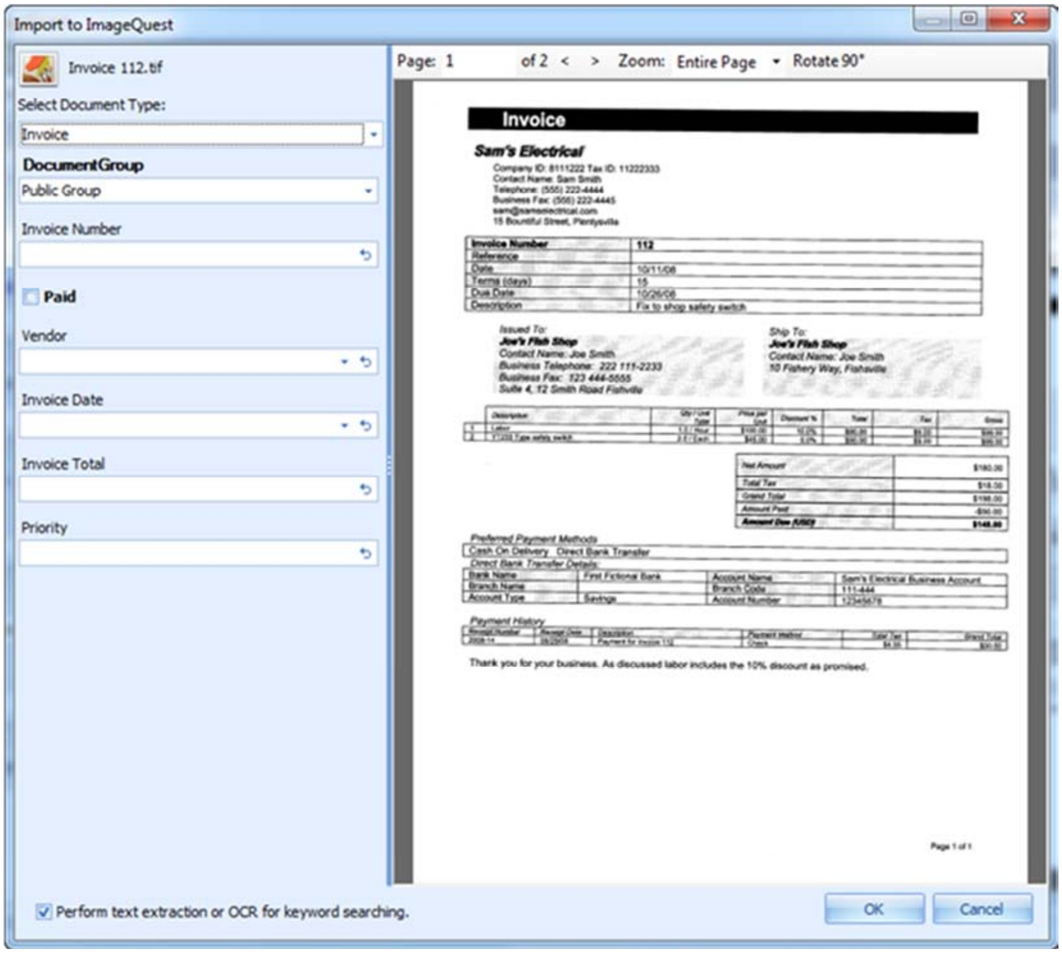
## Import A File

**Import** allows users to browse for and select a file from a client PC or network location and import the file as a document to IQdesktop.

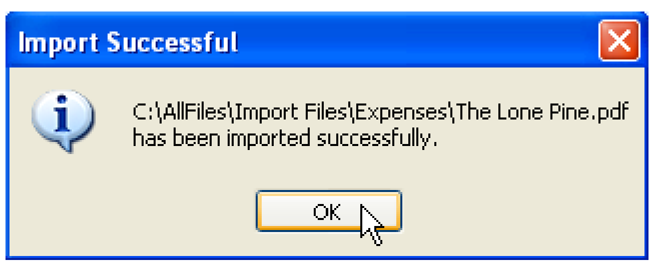
To import a file, click the button to launch a Windows "Open" dialog. See below. Locate and select the file to import and click Open.




The "Import file" field will display the file path of the selected file. Click "Import" to launch the "Import To ImageQuest" indexer and assign a Document Type and attribute values. See the following page for an example. Click "OK" to import the document to IQdesktop.



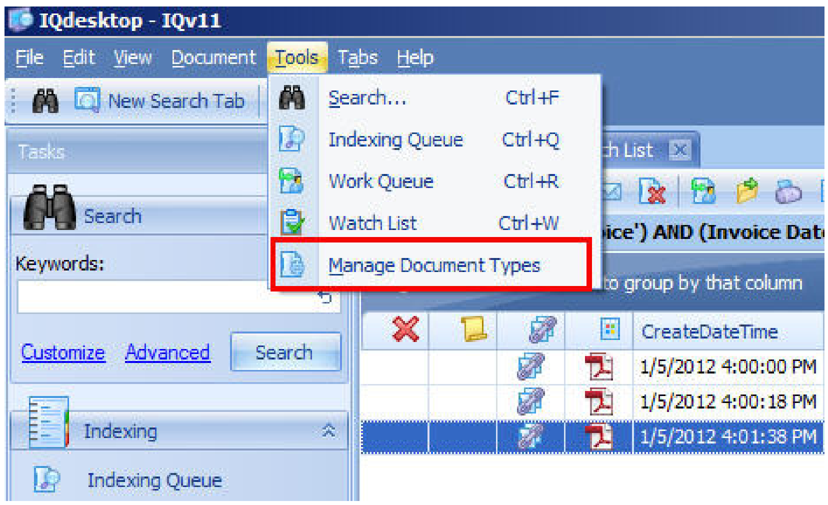

An "Import Successful" message will confirm the import is complete, as shown below. Click on "OK" to continue.



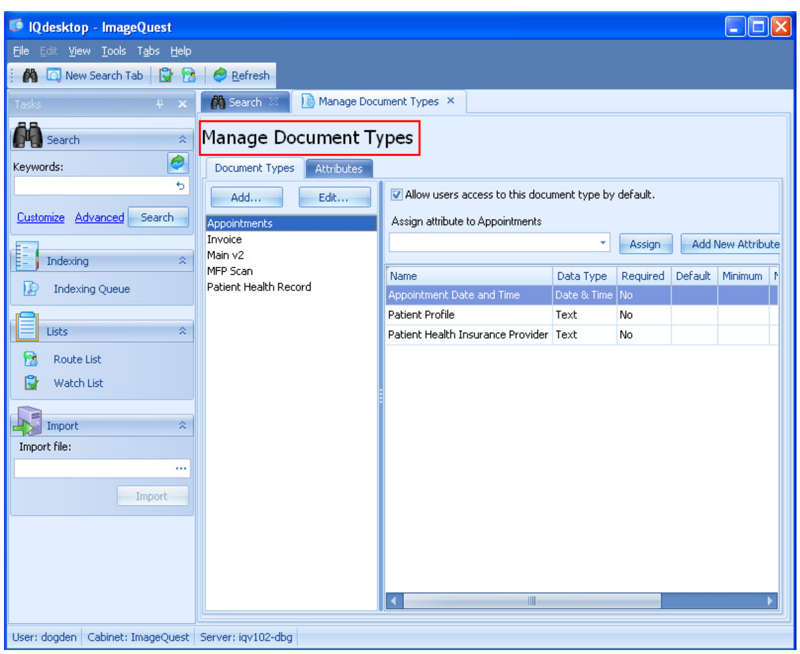

Users can also "drag and drop" files to the Import file field and then import the document to IQdesktop.

## Managing Document Types

Document Types and Attributes may be added and edited from IQdesktop if the user has Allow permissions to "Manage Document Types." This feature is convenient for users and also allows administrators to give certain users access while still restricting them from other administrative functions that require the use of IQadministrator. To Manage Document Types from IQdesktop, select it from the "Tools" menu as shown below.




The screenshot below highlights the **Manage Document Types** tab which is the same screen that appears in IQadministrator. For more information on **Manage Document Types**, see the *ImageQuest Administrator's Guide.*



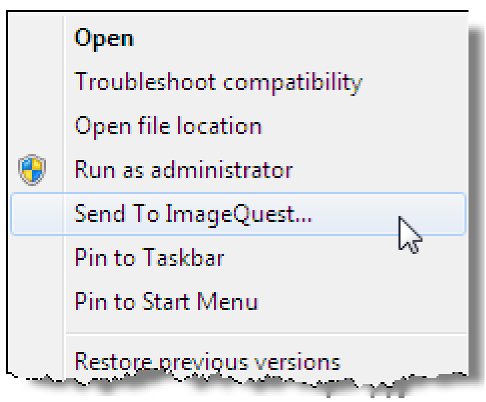
# Additional ImageQuest Client Applications

In addition to IQdesktop, there are three other client applications that may be used to get documents and files into IQ:

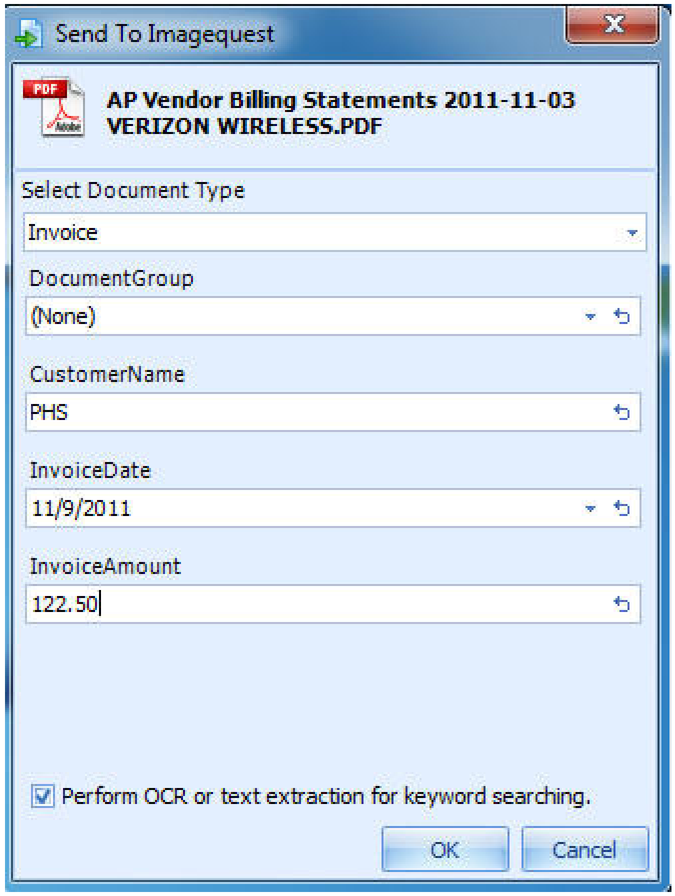
- Microsoft Windows Explorer Connector
- Microsoft Office Connector
- IQprinter

## Microsoft Windows Explorer Connector

Many users have electronic files that need to be stored in ImageQuest. For this purpose, ImageQuest can use Windows functionality to initiate processing electronic files. To do this, locate and highlight the file or files intended for filing in ImageQuest. Right-click on the highlighted files and select "**Send To ImageQuest"**




The "Send to ImageQuest" window appears allowing the user to select a Document Type from the drop-down menu and assign attributes as shown on the following page**.** Click "OK" to submit the file to IQ.




The "ImageQuest Connector for Windows Explorer" window prompts the user that the document has been successfully saved to ImageQuest.  Click "OK".


**<u>Note</u>:  Users must have the "Add Document" permission in order to use the Microsoft Window Explorer Connector.**

## Microsoft Office Connector

ImageQuest provides an add-in for several Microsoft Office programs which allows for sending and in some cases opening documents from ImageQuest. The following Microsoft applications are supported:

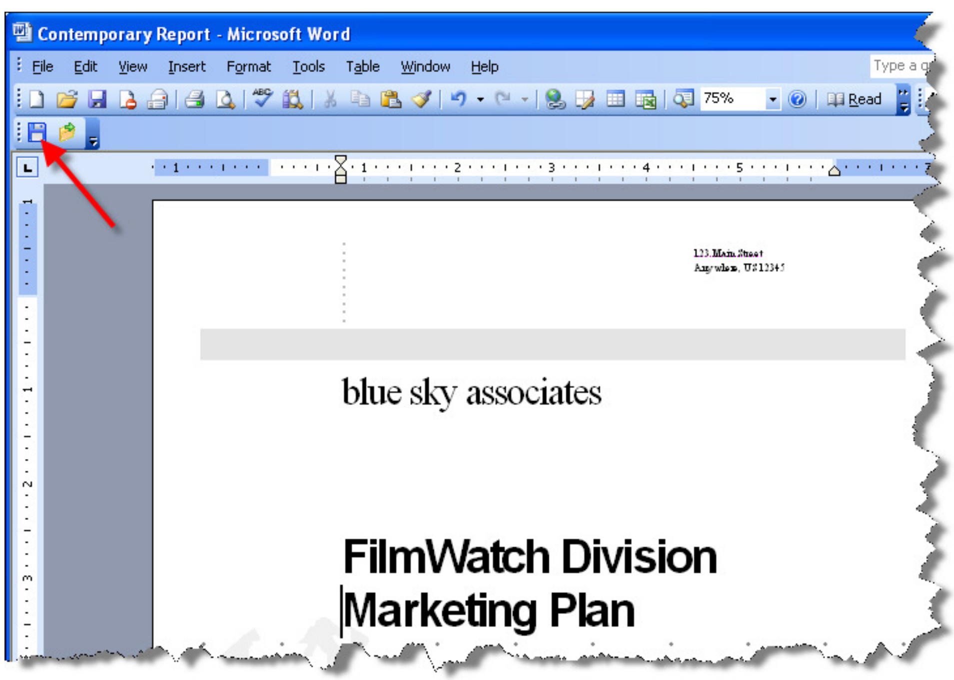
- Microsoft Word 2003 - 2010
- Microsoft Excel 2003 - 2010
- Microsoft Outlook 2003 - 2010

**<u>Note</u>: The Office Connector for Microsoft Office 2010 is only compatible with the 32-bit version.**

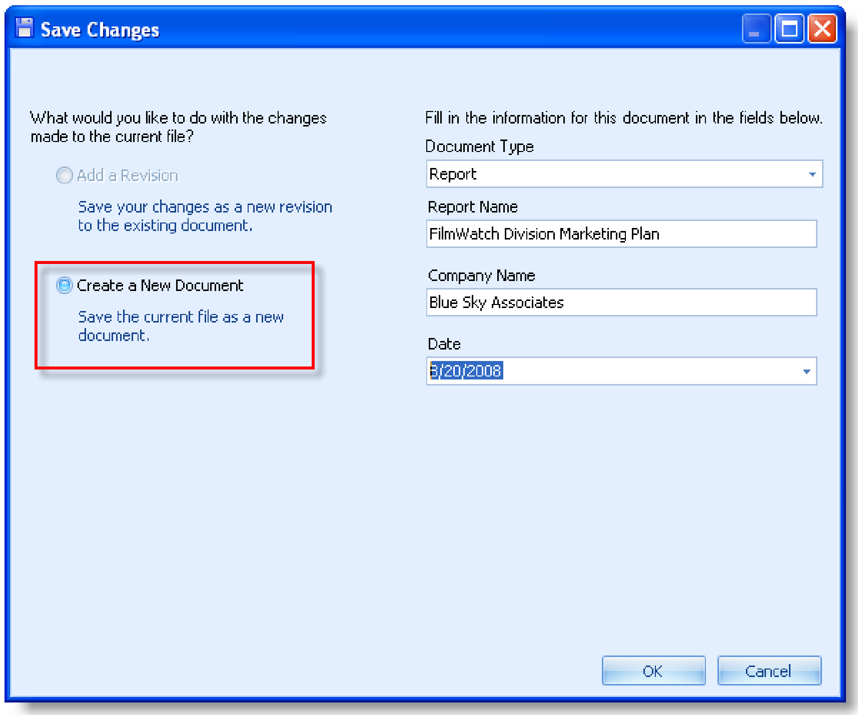
Other Microsoft file types can to be sent to IQ using the Windows Explorer Connector; see the previous section for more information.

The Microsoft Office Connector for Microsoft Word and Microsoft Excel installs a new toolbar with two new icons, one for saving files to IQ and one for opening files from IQ.

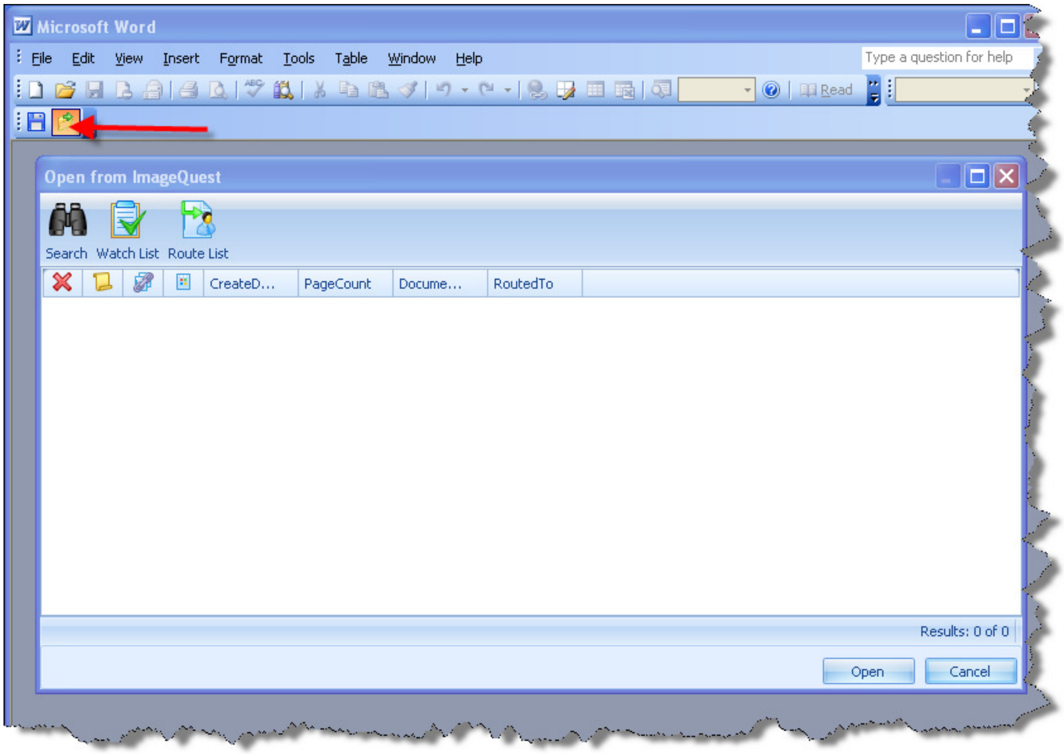
For example, create a Microsoft Word document that you wish to save in IQ as displayed below**.** See the highlighted **Save to ImageQuest** icon in the new toolbar; click the icon to save the file to IQ.



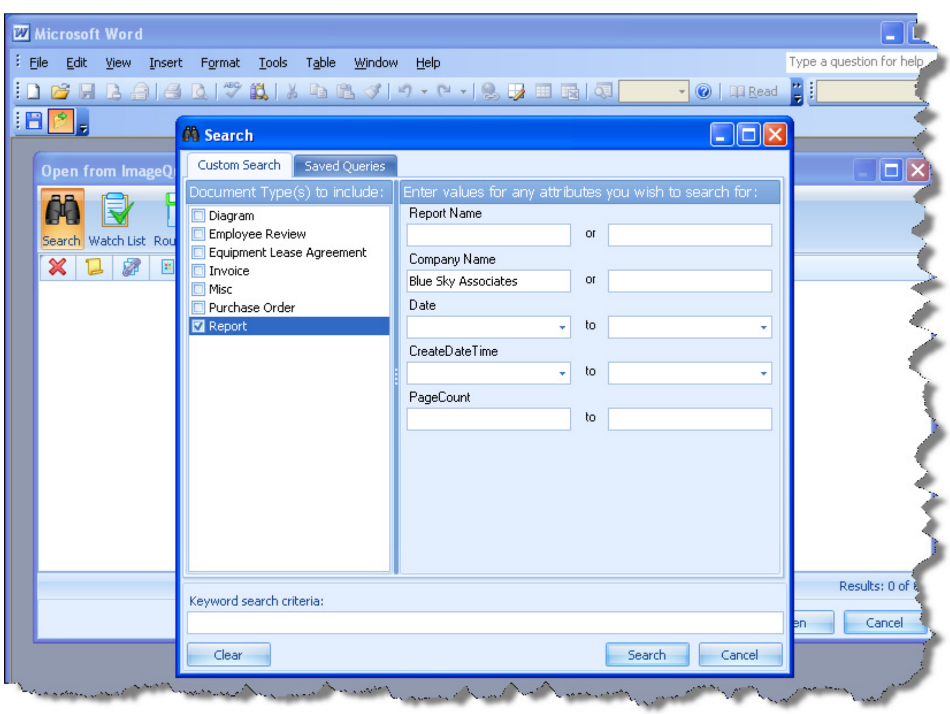
The "Save Changes" window appears allowing the user to "Add a Revision" or "Create a New Document" as demonstrated on the following page.  Since this is a new document, adding a revision to an existing document is not possible so the option is disabled.  Select the Document Type and assign attributes; click "OK" when finished. The file is now saved to IQ and is searchable from IQdesktop using the index information.



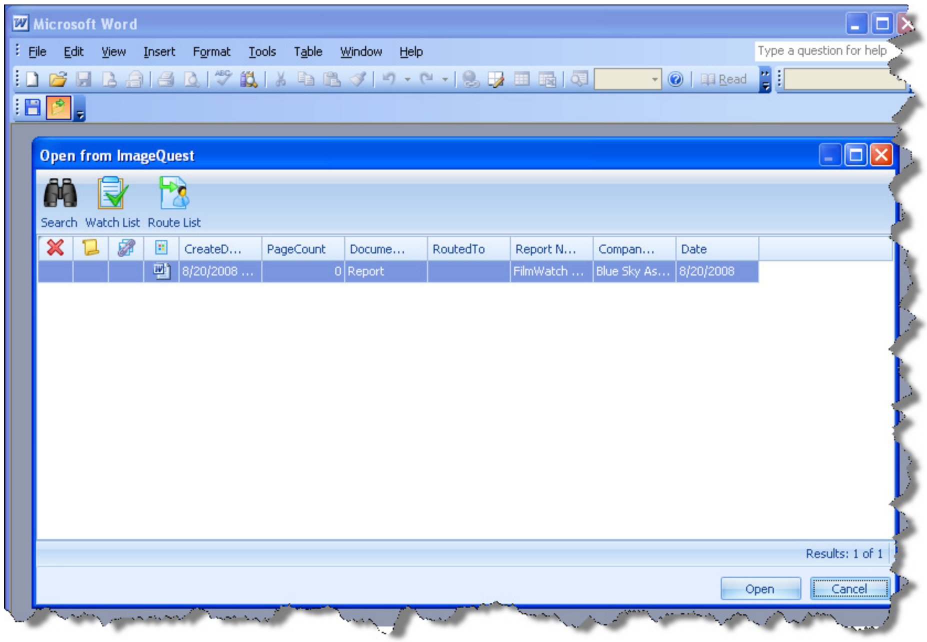

Now that the document is stored in IQ, it may retrieved using IQdesktop or by using the **Open from ImageQuest** button from the ImageQuest Toolbar as seen on the following page.  Clicking the **Open from ImageQuest** button brings up a new window allowing you to search for documents as well as access your **Watch List** and **Work Queue**.



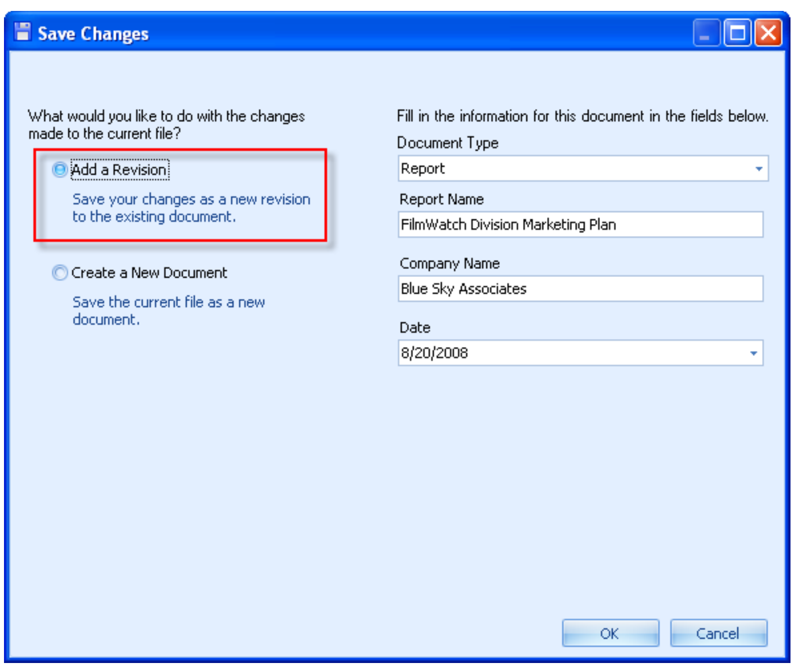

To find the document we saved earlier, click on the "Search" icon and enter the appropriate attributes and click the "Search" button. See below.



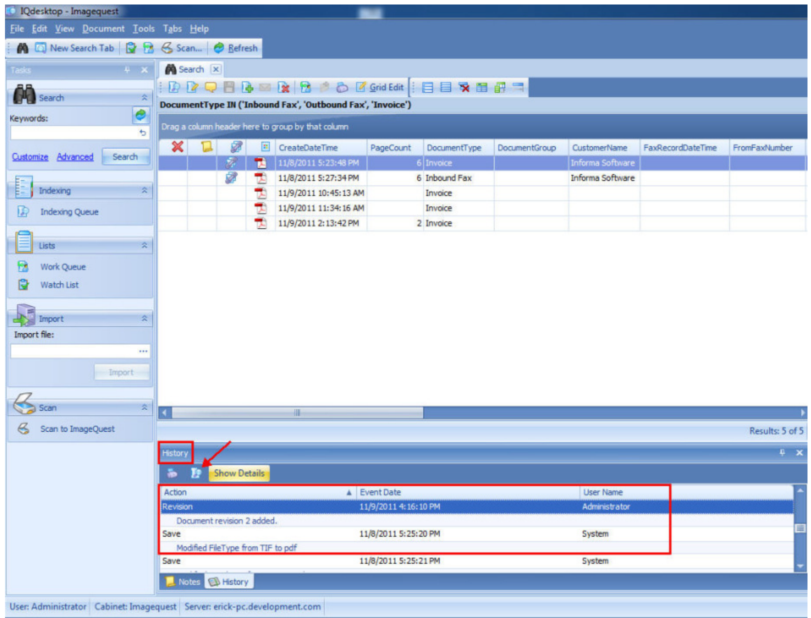
The search results will be displayed in the grid. Double-click on the record or highlight the record and click the "Open" button as shown below to open the document.




If we now make additional changes to this document and click the **Save to ImageQuest** button, the "Add a Revision" is now enabled. The index information will be automatically populated and may be changed if necessary. Click "OK" to send this revised document to IQ.

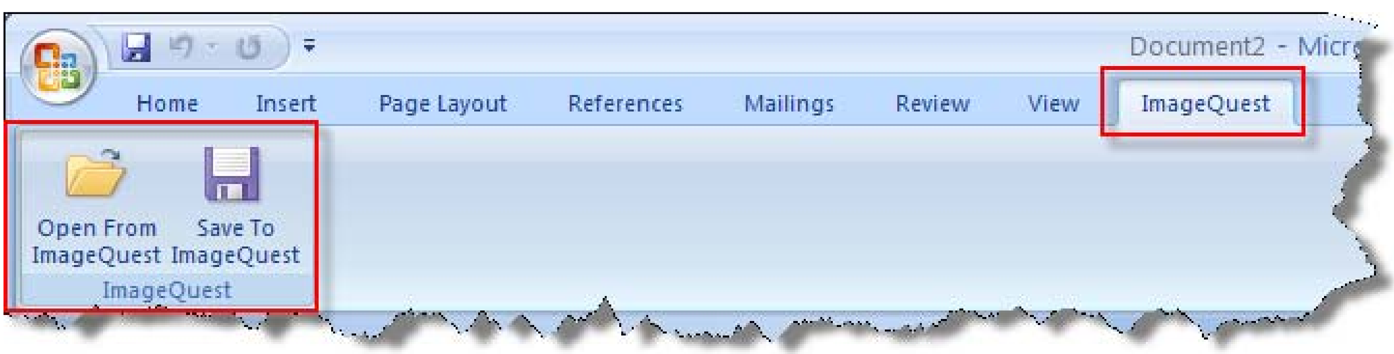


When a document is revised, the Document Type and all associated attributes on the "Save Changes" screen will replace the existing document metadata. Any previous versions of the document can still be accessed from the **History** panel by highlighting the "Revision" action and clicking on the "View Revision" button as shown below.




**<u>Note</u>: Microsoft Word and Excel 2007 & 2010 both function the same as the 2003 versions; however, the icons are located in the ImageQuest ribbon.**

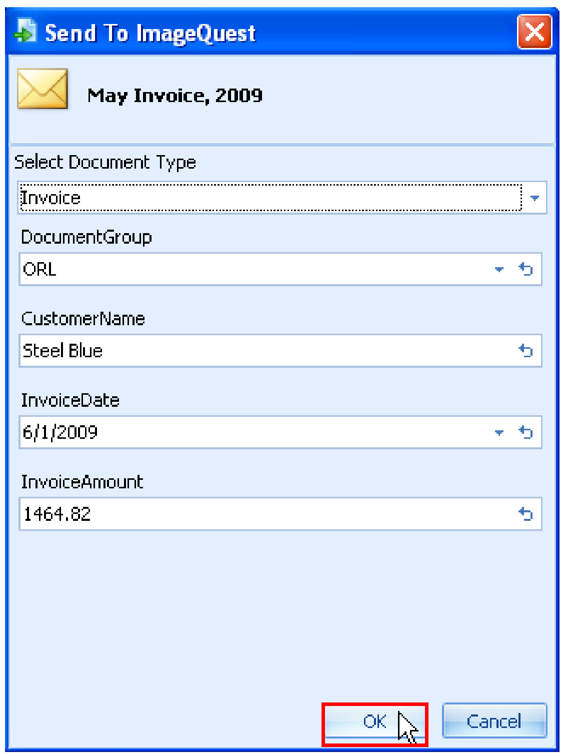
**<u>Note</u>: Only the most recent document revision can be opened directly from Microsoft Word or Excel.**




The Microsoft Office Connector for Microsoft Outlook differs from the Microsoft Word and Excel Connectors in that it allows the user to save emails and/or attachments into IQ and there is no option to open from IQ. The Microsoft Office Connector for Microsoft Outlook installs a new toolbar with one button called "Send to ImageQuest". This button has two options, "Entire Email…" and "Attachments Only…".

To store an email message in IQ, open Microsoft Office Outlook and locate the **Send to ImageQuest** icon in the toolbar as highlighted below.

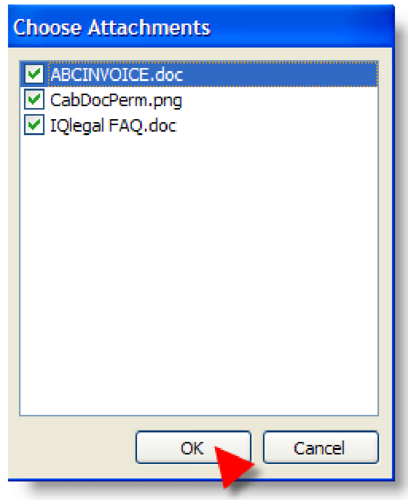

To send the entire email to IQ, highlight the email in Microsoft Outlook, click **Send to ImageQuest** and select "Entire Email…". The **Send to ImageQuest** window appears allowing the user to select a Document Type and fill in the associated attributes as demonstrated below. Click the "OK" button when finished.



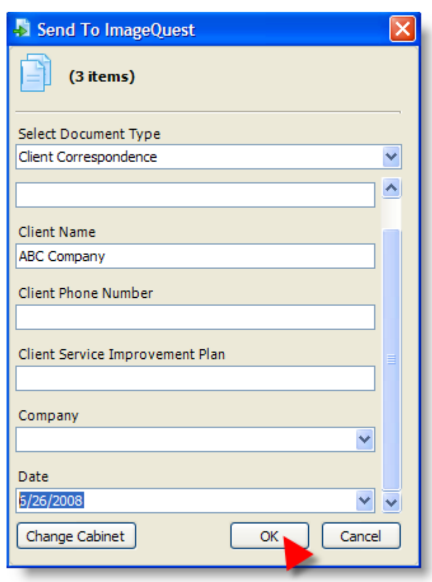

A message box will appear saying that the file was saved successfully to IQ. The email message is now searchable from IQdesktop.

To send one or more attachments without the main message body, follow the same steps, but this time select "Attachments Only…" from the **Send to ImageQuest** toolbar.

The "Choose Attachments" window appears allowing the user to select which attachments get stored in IQ as modeled below; click "OK". In the example below, three file attachments will be selected to send to IQ. All three attachments will receive the same index information.



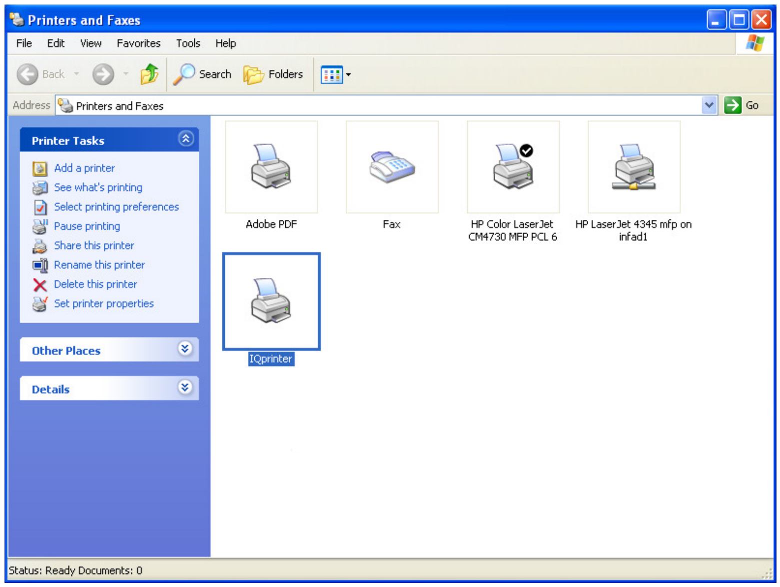

The **Send to ImageQuest** window appears allowing the user to select a document type and fill in the associated attributes as seen below. Click the "OK" button when finished. A message box will appear saying that the files were saved successfully to IQ. These attachments are now searchable from IQdesktop.



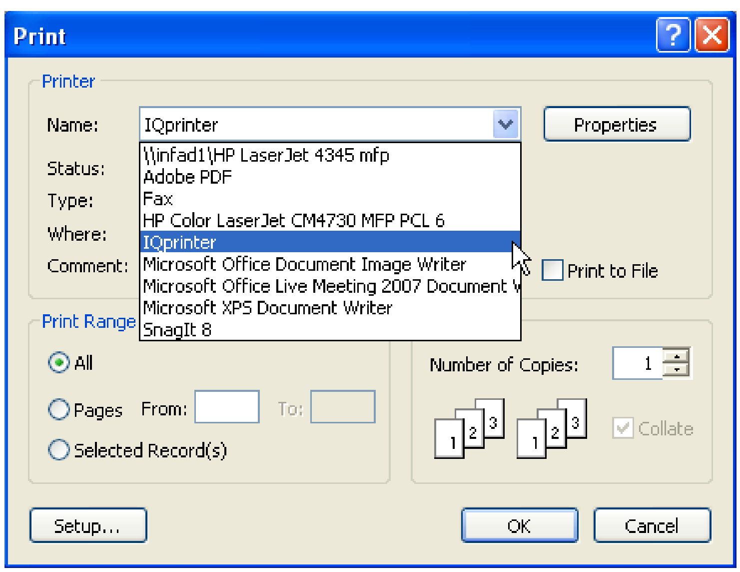

**<u>Note</u>: Users must have the "Add Document" permission to send new documents and the "Update Document" permission in order to add a revision to an existing record in ImageQuest using the Microsoft Window Office Connector.**

# IQprinter

IQprinter allows virtually any application to send documents to IQdesktop as a PDF file.  After installation, a virtual printer called IQprinter is created as shown below.

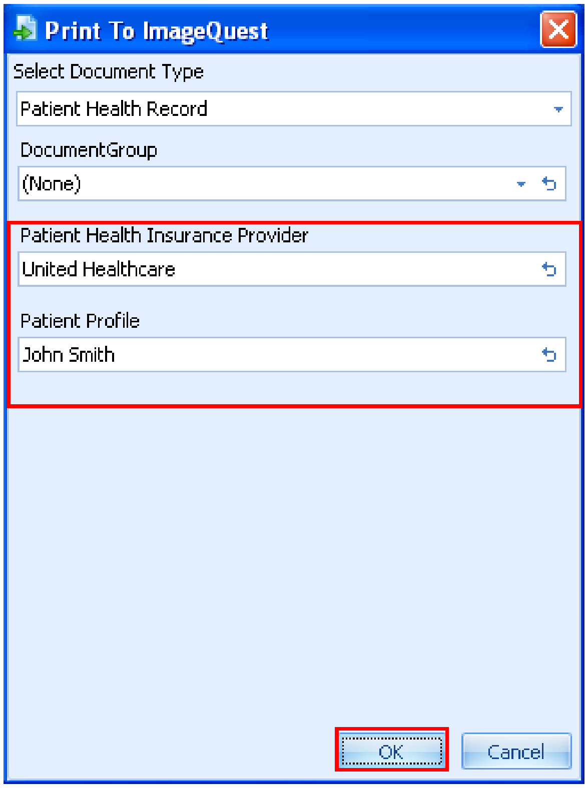



IQprinter can now be selected from a Windows Print dialog as shown below.




**<u>Note</u>:  The IQprinter default page size is 8"x11"; click "Properties" in the print dialog to adjust the page size if needed.**

IQprinter will launch a "Print To ImageQuest" screen as shown below. Select a Document Type, provide index values and click "OK" to send the document to IQdesktop.



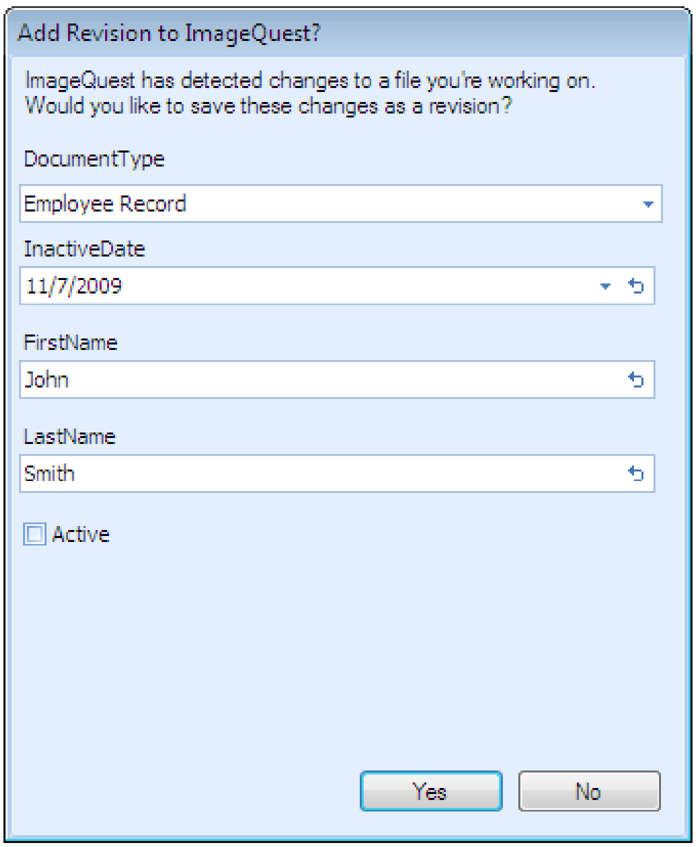

A confirmation will appear when the send is complete. See below. Click "OK" to close the "Print To ImageQuest" screen.


**<u>Note</u>: Users must have the "Add Document" permission in order to use IQprinter.**

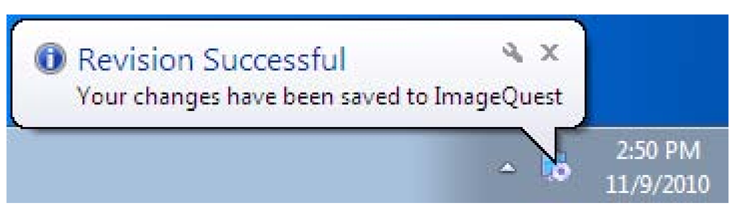
# ImageQuest Assistant

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

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




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



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