

# *ImageQuest*

## Administrator's Guide

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Version 11.0



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Title	ImageQuest Administrator's Guide
Version	11.0
Revision	November 2011

# Table of Contents

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Introduction to ImageQuest .....	6
Welcome to ImageQuest! .....	6
Requirements.....	7
Server Requirements .....	7
Client Requirements .....	7
OXPd Requirements (Required for HP MFP Integration).....	7
Installation Notes .....	8
Server Installation .....	8
Upgrading to 11.0 .....	9
Client Installation .....	9
Silent Client Installations.....	9
IQadministrator.....	10
Manage Warehouse.....	10
Manage Users .....	11
Adding New Users .....	13
Single Sign-On (SSO) Overview .....	15
Manage User Information .....	16
Deleting a User .....	16
Manage Licenses.....	17
SMTP Server .....	19
Cabinet List.....	20
Manage ImageQuest.....	21
Manage Users and Roles.....	21
New User Properties and Permissions.....	24
Membership.....	30
Adding New Roles .....	31
Removing Users or Roles .....	37
Manage Document Types .....	38

Document Type Overview.....	38
Attribute Overview .....	38
Creating a New Document Type .....	39
Creating and Assigning New Attributes .....	41
Input Masks.....	47
Custom Input Masks (Text) .....	52
Metacharacters .....	52
Special Characters .....	53
Literal Characters .....	53
Examples .....	54
Custom Input Masks (Numeric/Integer) .....	55
End-User Capabilities .....	58
Examples .....	58
Category\Subcategory List Attribute Type.....	59
Sharing Existing Attributes.....	61
Editing, Removing and Reordering Attributes .....	62
Editing and Removing Document Types .....	65
Manage Document Groups.....	67
Saved Queries .....	74
Document Destruction Rules .....	78
Destroy Deleted Documents.....	85
OCR Settings.....	90
Attribute Lookup Configuration .....	93
Notification Rules.....	97
Manage File Storage .....	99
Configure IQfolder .....	103
Configure IQmfp (OXPd) .....	106
Confirm Device Model Number and Firmware Versions .....	106
Loading the OXPd Solutions Installer onto the device.....	107
Configure IIS for OXPd.....	111



Install OXPd on the device .....	114
Advanced Configuration .....	128
Microsoft Windows Services.....	128
Database Configuration Utility.....	131
Report View .....	131
WebIQ.....	132
Configure WebIQ with IIS 6.....	132
Configure WebIQ with IIS 7.....	133
Additional configuration for WebIQ on a x64 bit Operating System.....	134
Log Files.....	135

# Introduction to ImageQuest

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## Welcome to ImageQuest!

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

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

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

ImageQuest Support

(877) 475-7778

[support@informasoftware.com](mailto:support@informasoftware.com)

<http://www.informasoftware.com/support>

# Requirements

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## Server Requirements

- P4 CPU or higher (multi-core recommended)
- 2GB Memory (4GB Recommended)
- DVD Drive (if installing from disc)
- 300MB free hard drive space (for program files only)
- Windows Server 2003 R2 SP2, Windows Server 2008 SP2, Windows Server 2008 R2, Windows XP SP3, Windows Vista SP2, or Windows 7. (32-bit and 64-bit OS versions are supported, but ImageQuest runs in 32-bit mode on a 64-bit OS)
- If a software firewall product is running on the server, please ensure that TCP ports 32751 and 33176 and UDP port 2112 are open.
- Microsoft .NET Framework version 4.0 (Full Framework)
- Microsoft SQL Server 2005 or 2008 is required to install ImageQuest. If you do not already have a SQL server, SQL server 2008 R2 Express is included on the installation media.
- Internet Information Service (IIS) Server is required to configure WebIQ
- IIS must be installed and configured to install OXPd on an HP device which does not natively support OXPd.

## Client Requirements

- P4 CPU or higher (multi-core CPU recommended)
- 80MB free hard drive space (for program files only)
- Microsoft .Net Framework version 4.0 (Client Profile)
- Local administrative access is required to perform the initial client installation.
- Windows XP SP3, Windows Vista SP2, or Windows 7. (32-bit and 64-bit OS versions are supported, but ImageQuest 10.3 runs in 32-bit mode on a 64-bit OS)
- Adobe Acrobat Reader 6.0 or higher
- Microsoft Office 2003, 2007 or 2010 (x86 only) is required for the ImageQuest Office Connector
- WebIQ Clients require Internet Explorer 7 or higher

## OXPd Requirements (Required for HP MFP Integration)

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

## Installation Notes

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

## Server Installation

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

- Install/Upgrade ImageQuest 10.3 to ImageQuest 11.0 using an existing SQL server in the organization
- Install ImageQuest 11.0 and SQL 2008 R2 Express x86 edition
- Install ImageQuest 11.0 and SQL 2008 R2 Express x64 edition

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

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

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

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

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

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

## Upgrading to 11.0

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

To upgrade to version 11.0, click the “Install ImageQuest...” > “Install/Upgrade” buttons from the autorun program or run the server.msi file from the root of the installation media. The installation program will automatically detect that you are upgrading from an older version and will upgrade all of the ImageQuest cabinets listed in the Warehouse.

## Client Installation

To install or upgrade the ImageQuest client run the client.msi program from the installation media. The client.msi file can also be found on the ImageQuest server in a file folder called ClientSetup.

## Silent Client Installations

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

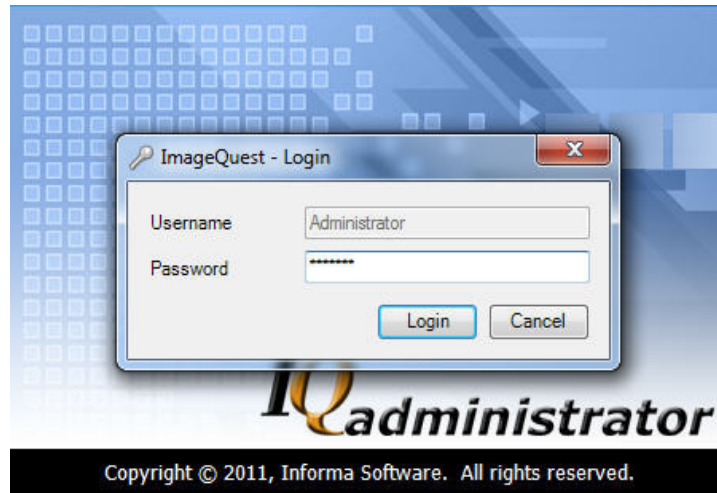
```
Msiexec /i client.msi /quiet
```

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

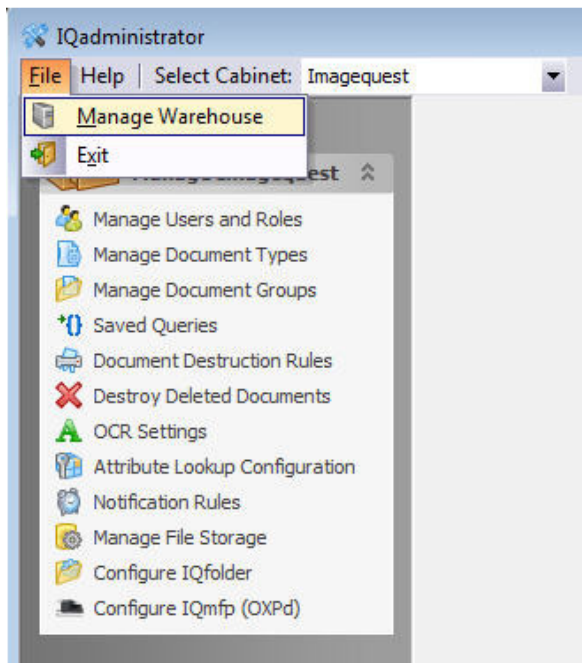
# IQadministrator

## Manage Warehouse

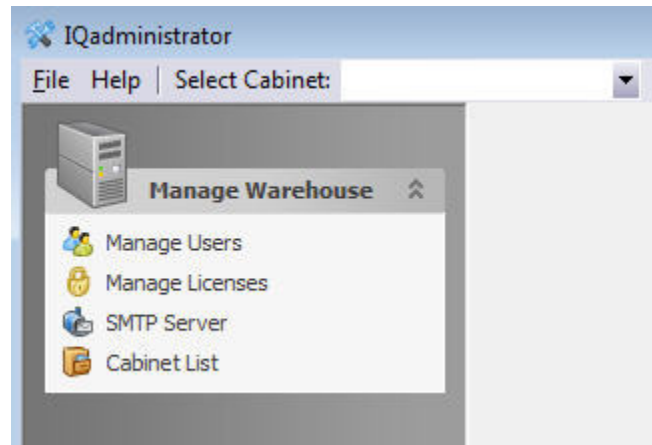
To access IQadministrator after the server installation, go to Start > All Programs > Informa Software > ImageQuest > IQadministrator and enter the Administrator password. If this is the first time running IQadministrator, you will be prompted to create the password. Click “Login” as illustrated below.



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



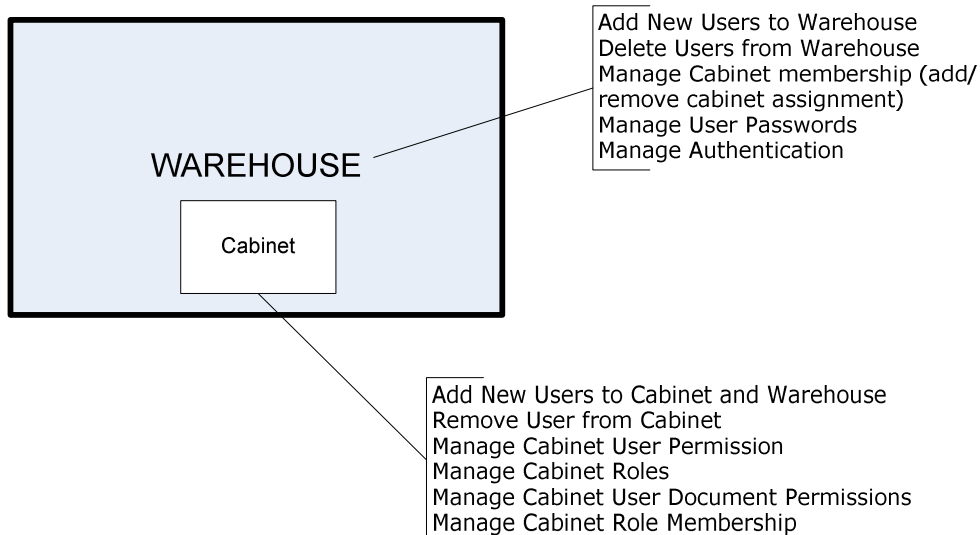
The following features may be accessed from the “Manage Warehouse” window: Manage Users, Manage Licenses, SMTP Server and the Cabinet List as displayed below.



## Manage Users

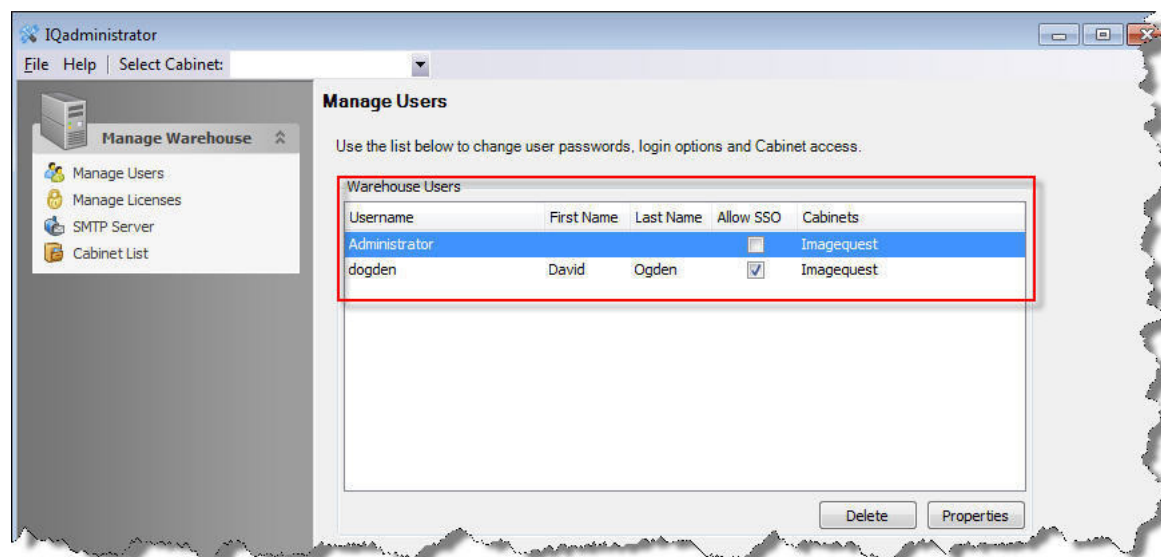
Anyone who will need to access ImageQuest will need to be added as a user in the *IQadministrator*.

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



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

**Manage Users** allows the Administrator to change user passwords, login options and Cabinet access. The screen on the next page shows a list of established Warehouse.



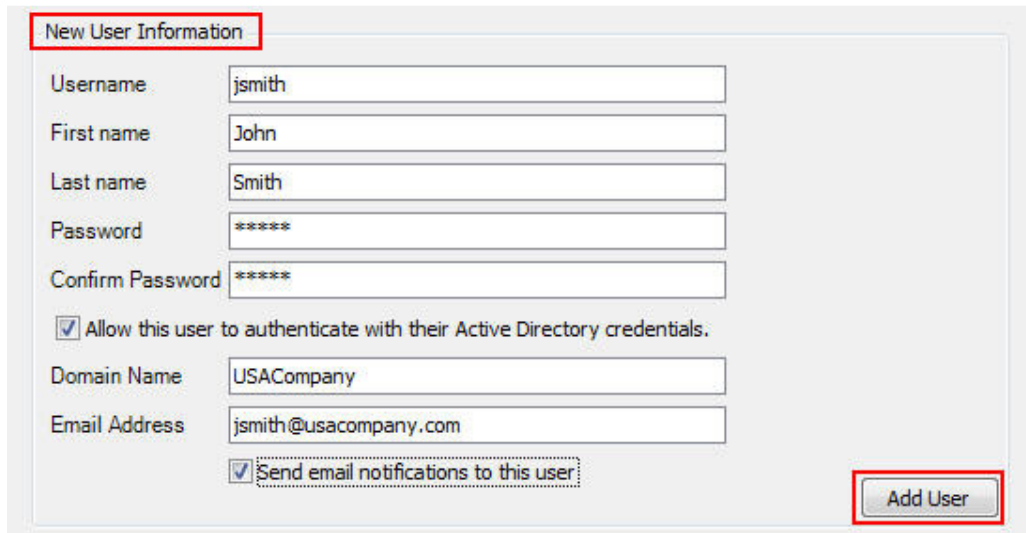
**Note:** The Administrator User is created by default with cabinet access and can be modified but cannot be deleted.



## Adding New Users

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

Enter the name of the user in the “Username” field and the Domain in the “Domain Name” field. When creating a new user, click the checkbox to “Allow this user to authenticate with their Active Directory credentials”; if you wish to assign the user Single-Sign On (SSO). See the **Single Sign-On (SSO) Overview** on page 9 for more information. Click “Add User” at the bottom right to finish adding the new user.



The screenshot shows a web form titled "New User Information" with a red border. The form contains the following fields and options:

- Username:** jsmith
- First name:** John
- Last name:** Smith
- Password:** \*\*\*\*\*
- Confirm Password:** \*\*\*\*\*
- ☒ Allow this user to authenticate with their Active Directory credentials.
- Domain Name:** USACompany
- Email Address:** jsmith@usacompany.com
- ☒ Send email notifications to this user
- Add User** (button with a red border)

See below for information about user options.

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

**Note:** Routing notifications require further mail configuration.

## Single Sign-On (SSO) Overview

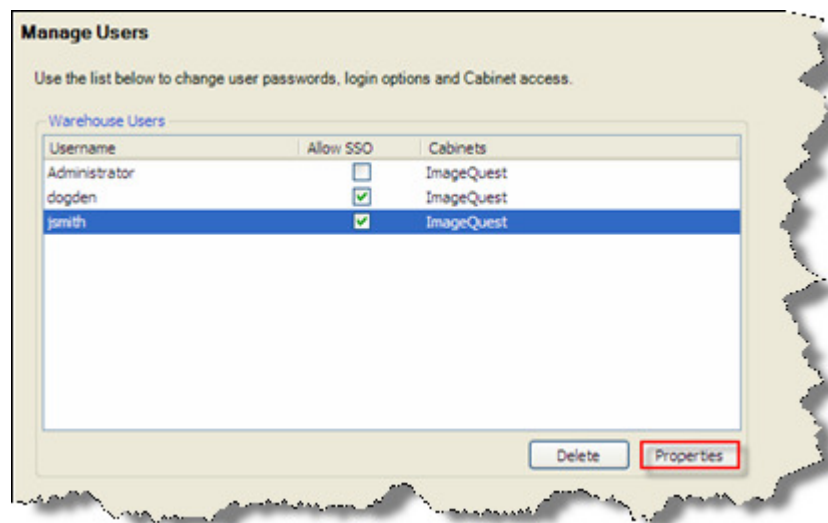
ImageQuest gives the Administrator the option of allowing users to authenticate with their Active Directory credentials using Single Sign-On (SSO).

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

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

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

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



## Manage User Information

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

**Manage Users**

User information for jsmith

Current Password

New Password

Confirm Password

First Name

Last Name

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

Domain Name

Email Address

☒ Send email notifications to this user

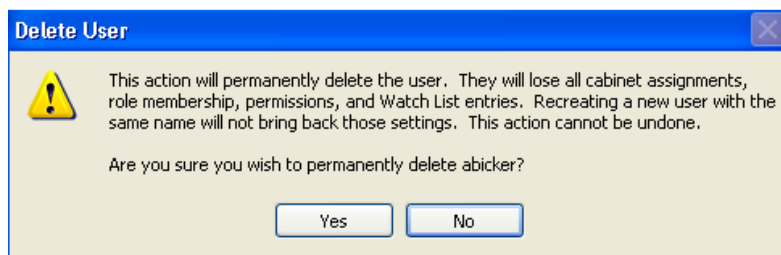
IMPORTANT: Removing access to a cabinet for a user will cause them to lose all permission assignments, role membership and watch list entries in that cabinet.

Cabinet Access

☒ Imagequest

## Deleting a User

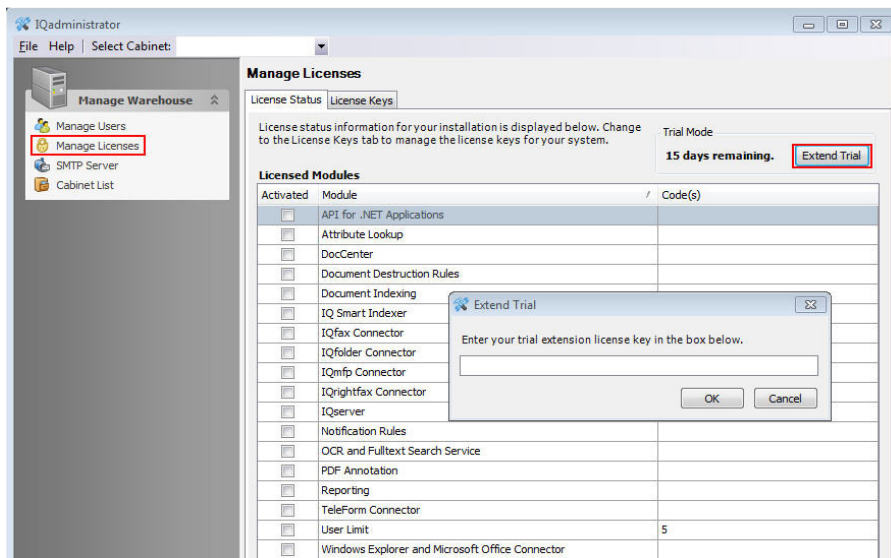
To delete a user from the Warehouse and from all Cabinets, highlight the username and click “Delete”. Deleting a user from the Warehouse cannot be undone; this function will permanently delete the user and remove the user from all Cabinet assignments, role membership, permissions and the Watch List entries.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



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

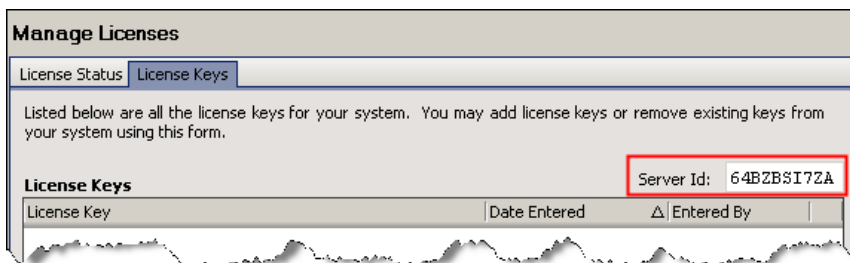
## Manage Licenses

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



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

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



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

Click the “+” and “-” boxes to expand or collapse the list of features in the Warehouse that are licensed. In the screenshot below, “dogden” has entered two license keys, one entered on March 19, 2008 and the other on June 9, 2008. “Entered by” reflects which Windows user added the key.

**Manage Licenses**

License Status | License Keys

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

Server Id: 7C3FKRD6BI

License Key	Date Entered	Entered By
KTDMP-R6NY7-YIJS5-BRSKY-H4MFR-3DMN5-6HZLD-4...	3/19/2008 5:39:47 PM	dogden
KQR-CGIZJ-EFQG2-YL3ME-JRCFY-BCERQ	6/9/2008 10:36:17 AM	dogden

Module / Code

Attribute Lookup	
DocCenter	
Document Indexing	
IQfolder Connector	
IQscan	
IQserver	7C3FKRD6BI
OCR and Fulltext Search Service	
User Limit	Unlimited
Windows Explorer and Microsoft Office Connector	
IQmfp Connector	CNBXB02422

Enter a new license key

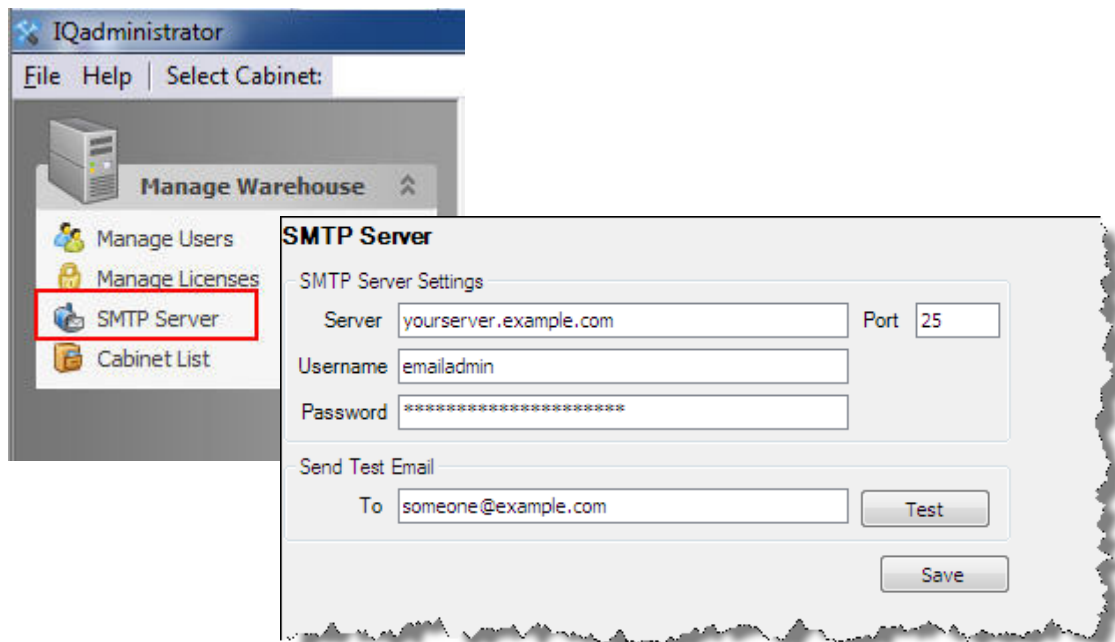
Add

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

## SMTP Server

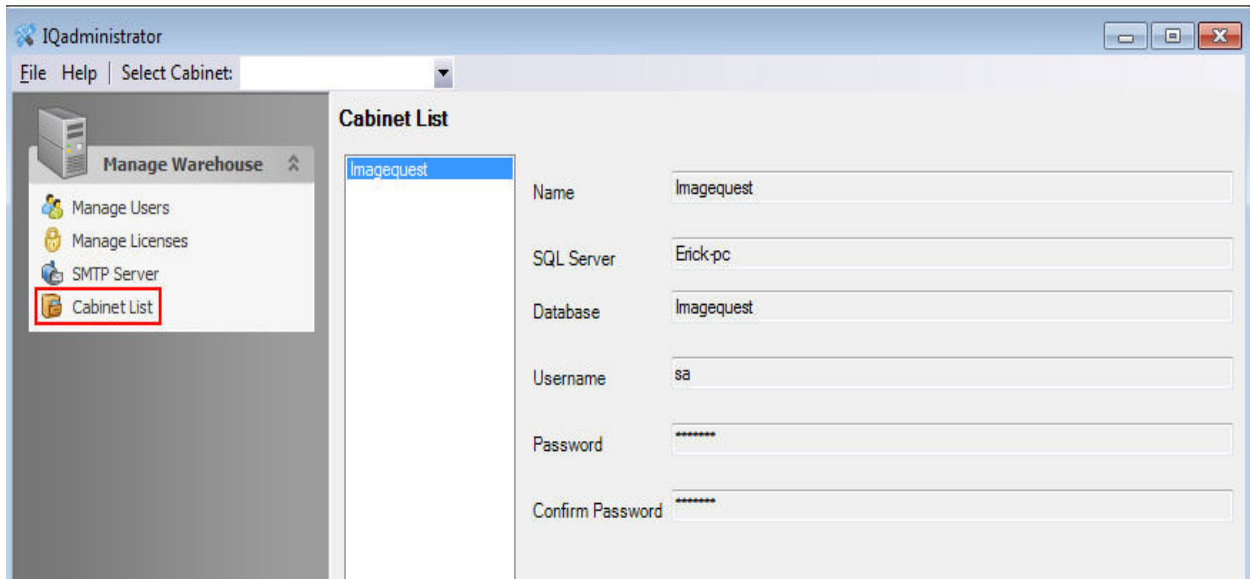
The SMTP Server menu allows the administrator to configure the SMTP Server Settings for ImageQuest email routing notifications and send a test email to confirm the settings are valid.

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



## Cabinet List

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

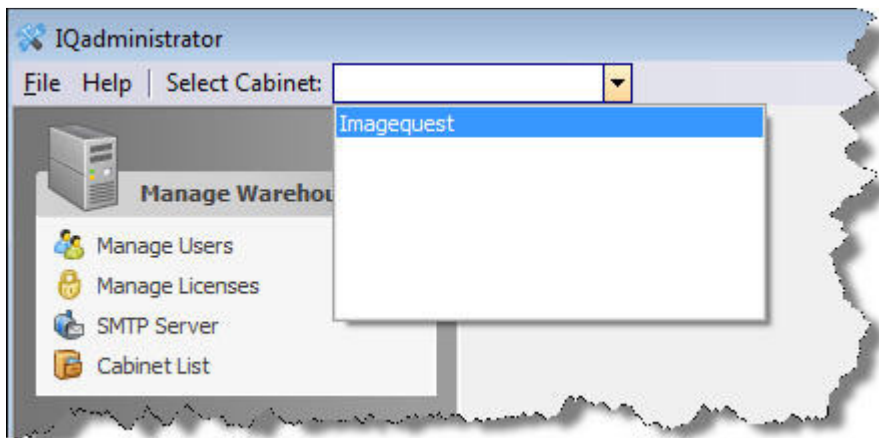




# Manage ImageQuest

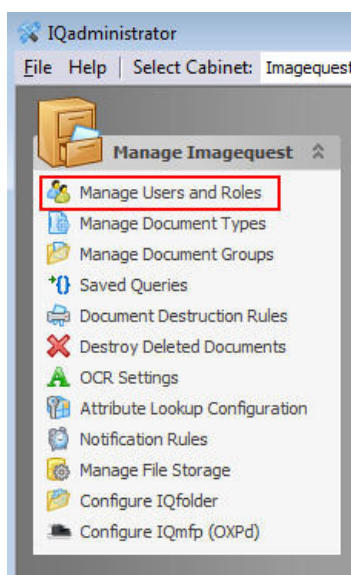
Manage ImageQuest allows the administrator to add and configure cabinet users, document types, document groups and HP MFP devices. They can also create queries for frequently used IQ searches, manage the IQ file storage location and configure folders for use with IQfolder.

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



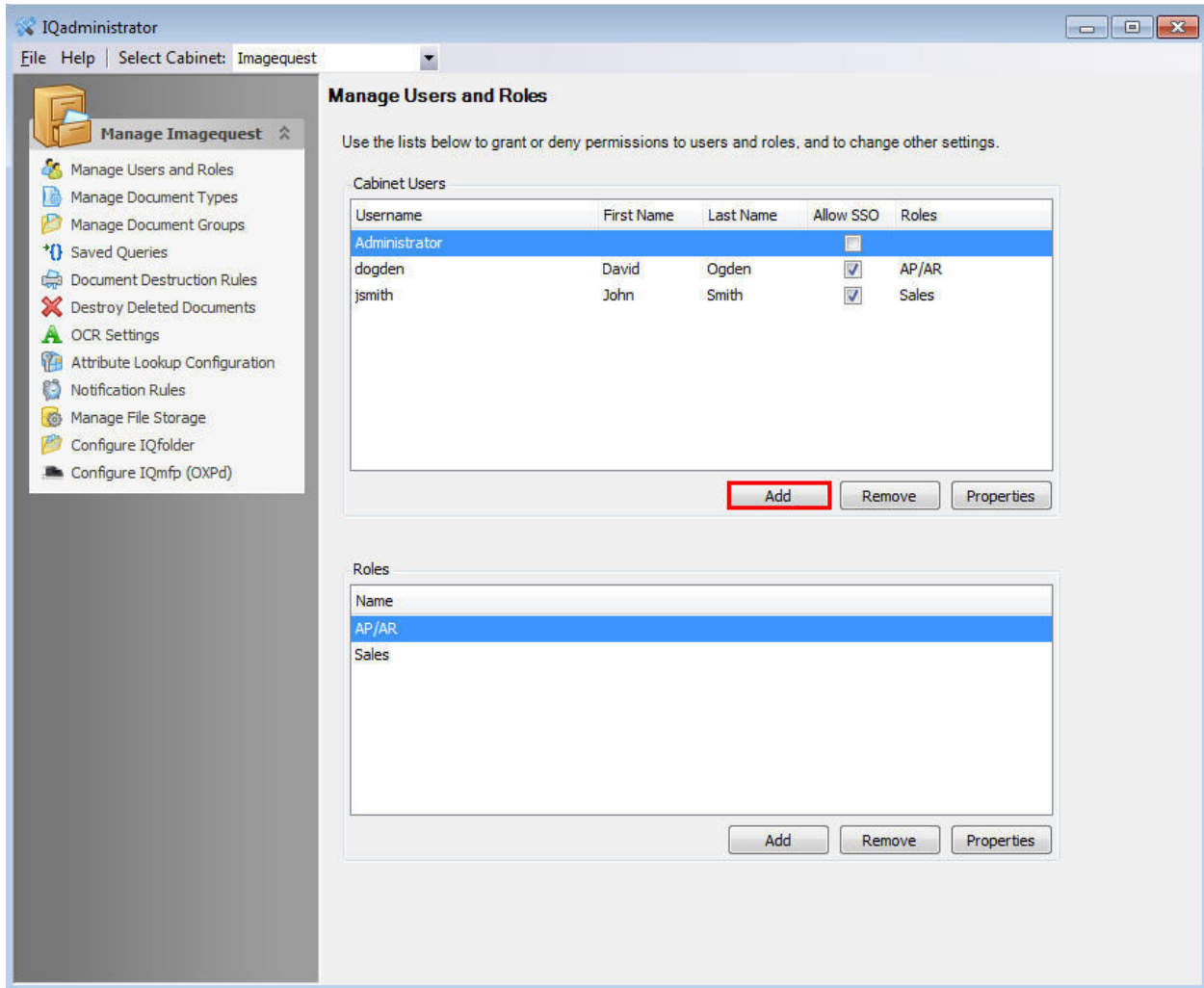
## Manage Users and Roles

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



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

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



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

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

Review **New User Information** on Page 14 before entering new user information in the fields shown below.

IQAdministrator

File Help | Select Cabinet: Imagequest

**Manage Imagequest**

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

**Manage Users and Roles**

☐ Add an existing user.

☒ **Create a new user.**

Username: tjones

First name: Tom

Last name: Jones

Password: \*\*\*\*

Confirm Password: \*\*\*\*

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

Domain Name: USACompany

Email Address: tjones@usacompany.com

☒ Send email notifications to this user

**Next** Cancel

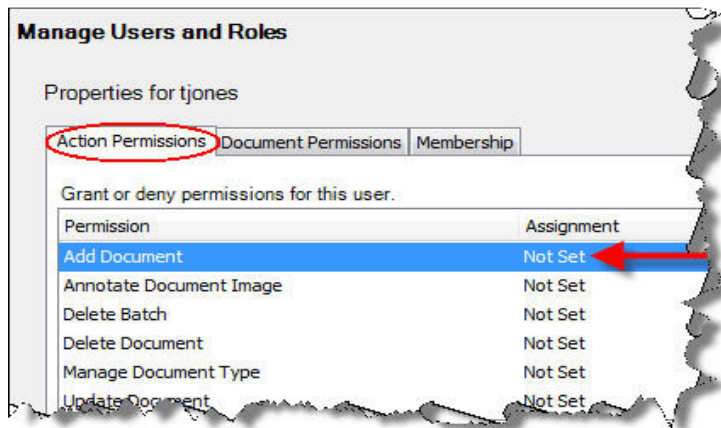
**Note:** If the user will authenticate with their Active Directory credentials, the Username must match the user's Active Directory login name. SSO is selected by default. Uncheck the checkbox for Active Directory credentials to deactivate SSO for a user and specify a password for the user instead;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

## New User Properties and Permissions

ImageQuest features the following action permissions for users and roles:

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

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

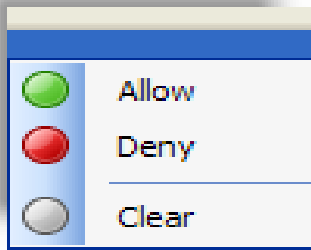


Before setting permissions, see the chart on the next page to distinguish between "Not Set," "Allow" and "Deny".

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

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

**Note:** The Administrator user's Action Permissions are all set to "Allow" by default.



### Manage Users and Roles

Properties for dogden

**Action Permissions** | Document Permissions | Membership

Grant or deny permissions for this user.

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

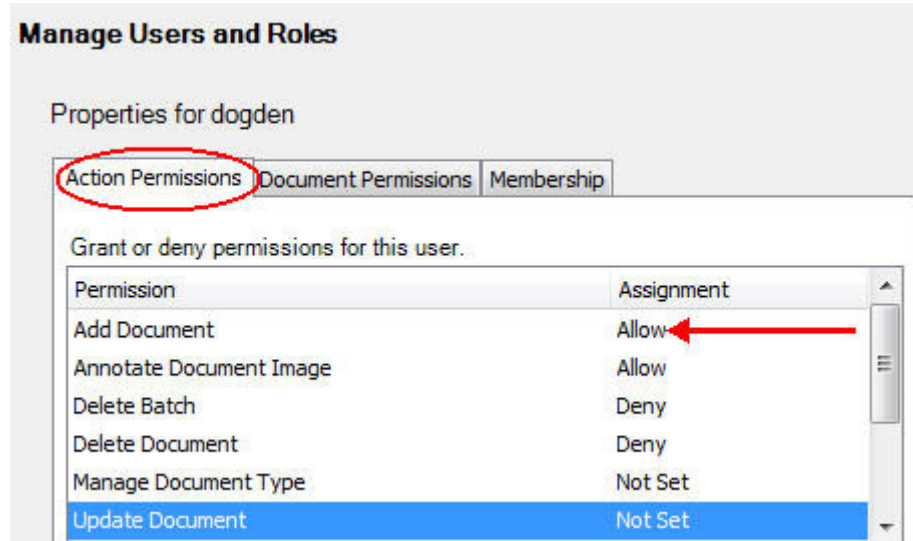
Membership in one or more roles can change the effective permissions for a user. The list below represents the users' effective action permissions.

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

Done

**Note:** Permissions can also be set at the role level. To add roles and assign users, see “Adding New Roles”. See the effective permissions above representing the user’s combined user/role permissions.

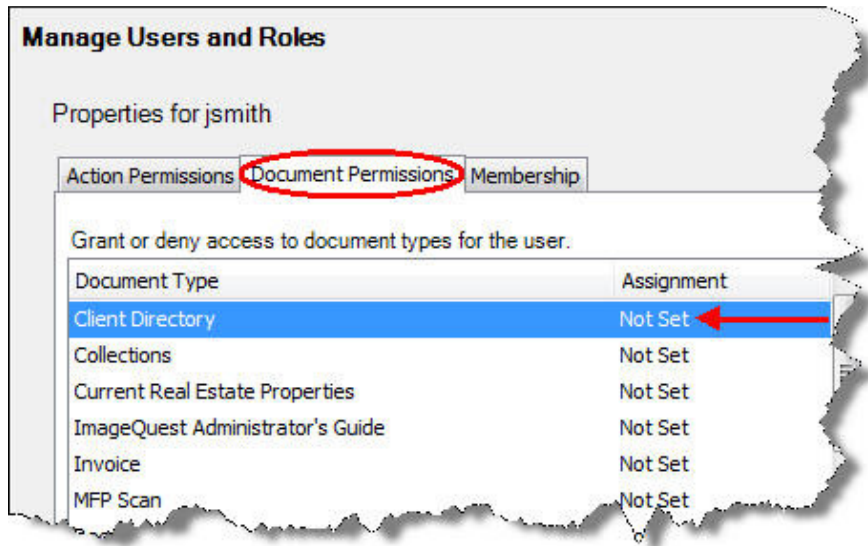
In the example highlighted on the next page, notice that “dogden” is granted permission to “Add Document” and “Annotate Document Image,” but is denied permission to “Delete Batch” and “Delete Document”. At the same time, the permissions for “dogden” to “Manage Document Type” and to “Update Document” are “Not Set”.



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

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

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





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

**Note:** “Allow by Default” below refers to an option in Manage Document Types. See pg. 32 for more information.

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

## Membership

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

The screenshot shows a window titled "Manage Users and Roles". Inside, there's a sub-header "Properties for Bjones". Below this are three tabs: "Action Permissions", "Document Permissions", and "Membership". The "Membership" tab is selected and highlighted with a red circle. The main area of the "Membership" tab contains the text "Assign or remove role membership for the user." followed by a list box. The list box has two items: "AP/AR" with an unchecked checkbox and "Sales" with a checked checkbox. The "Sales" item is highlighted in blue. At the bottom right of the window, there is a "Done" button, which is also highlighted with a red rectangle.

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

## Adding New Roles

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

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

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

**Manage Users and Roles**

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

**Cabinet Users**

Username	Allow SSO	Roles
Administrator	<input type="checkbox"/>	
dogden	<input checked="" type="checkbox"/>	AP/AR
jsmith	<input checked="" type="checkbox"/>	

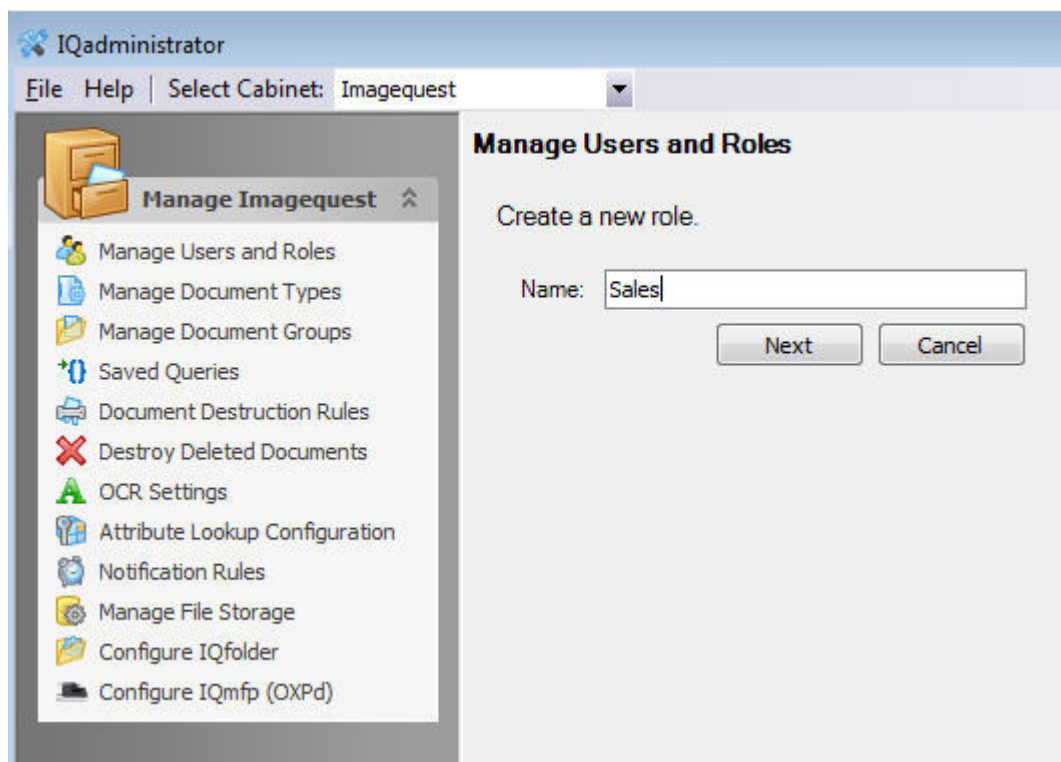
Add Remove Properties

**Roles**

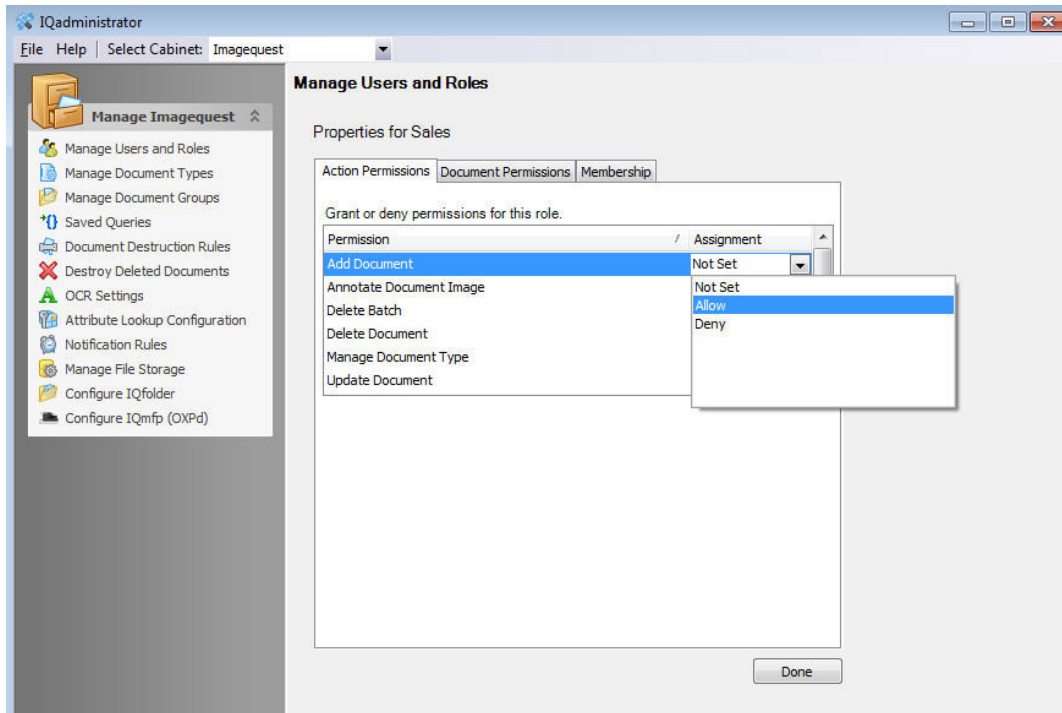
Name
AP/AR
Receptionist

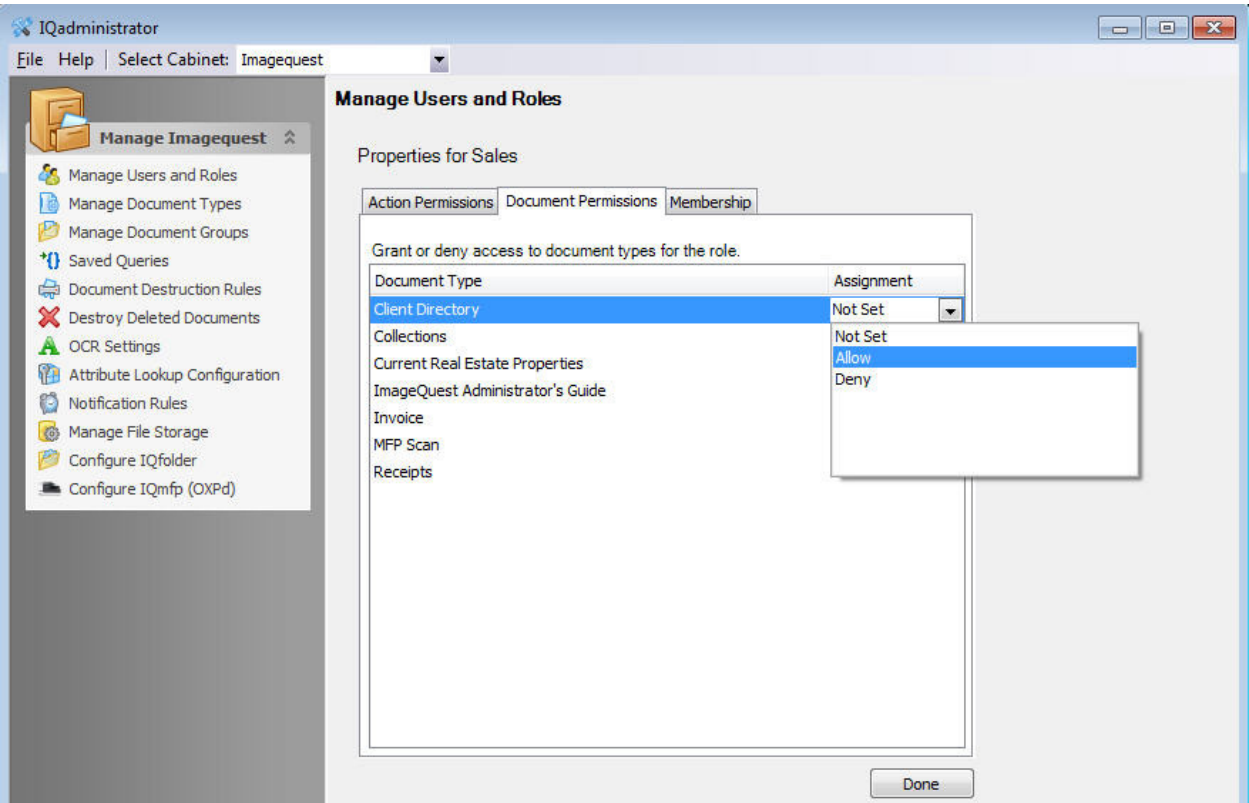
Add Remove Properties

For example, to create a role for the Sales Department, enter “Sales” in the “Create a new role” window as illustrated on the next page and click “Next”.

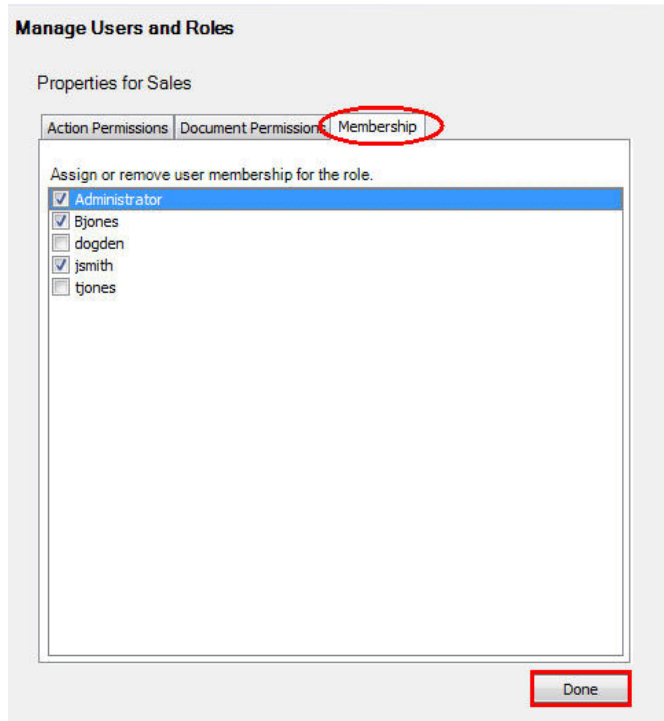


Set action and document type permissions for the “Sales” role as shown below and on the following page; click “Done” when finished.

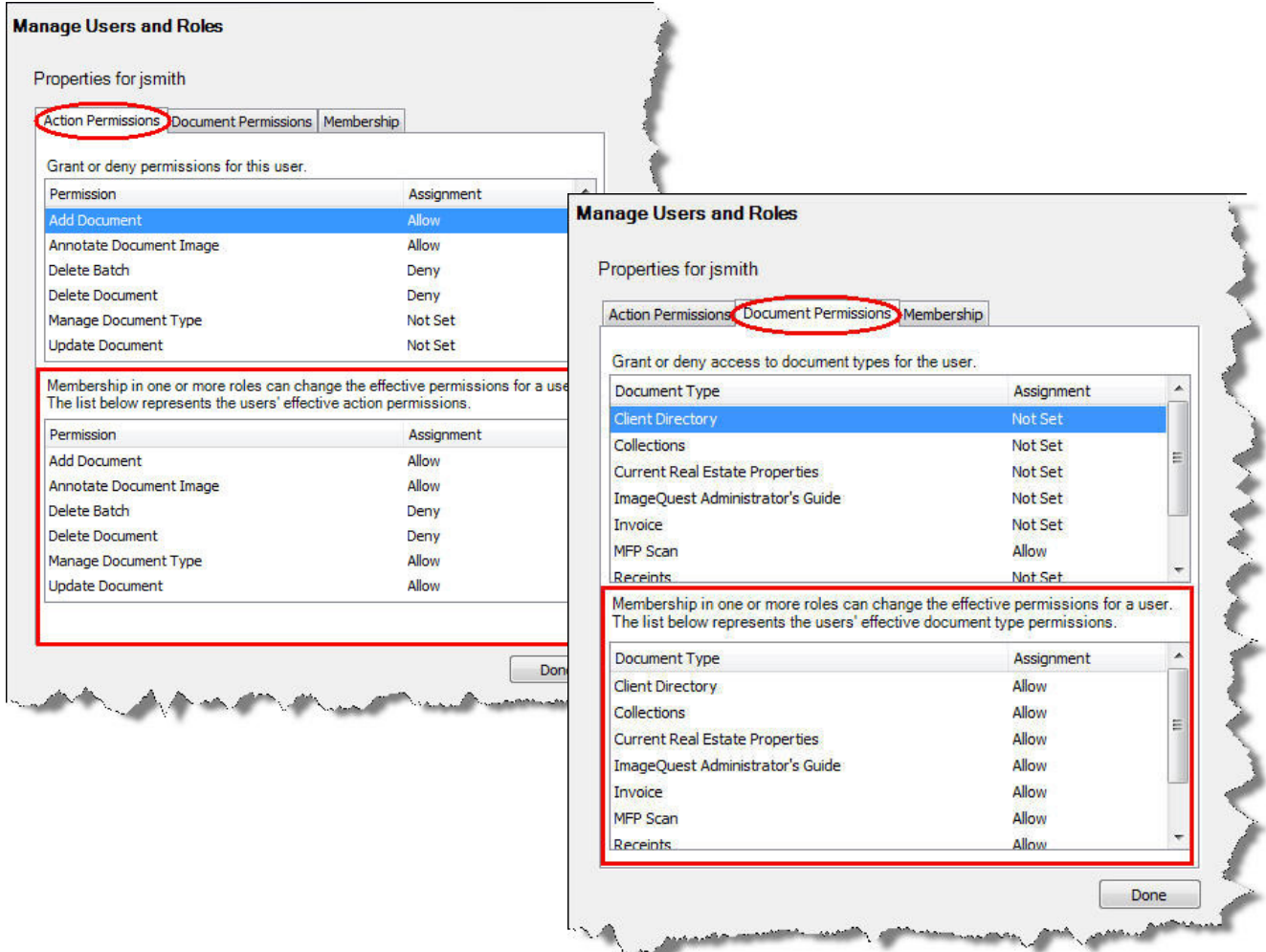




Click the “Membership” tab to assign or remove user membership for the indicated role as displayed below. Notice that “Administrator,” “Jsmith” and “Bjones” are all assigned to the Sales role membership.



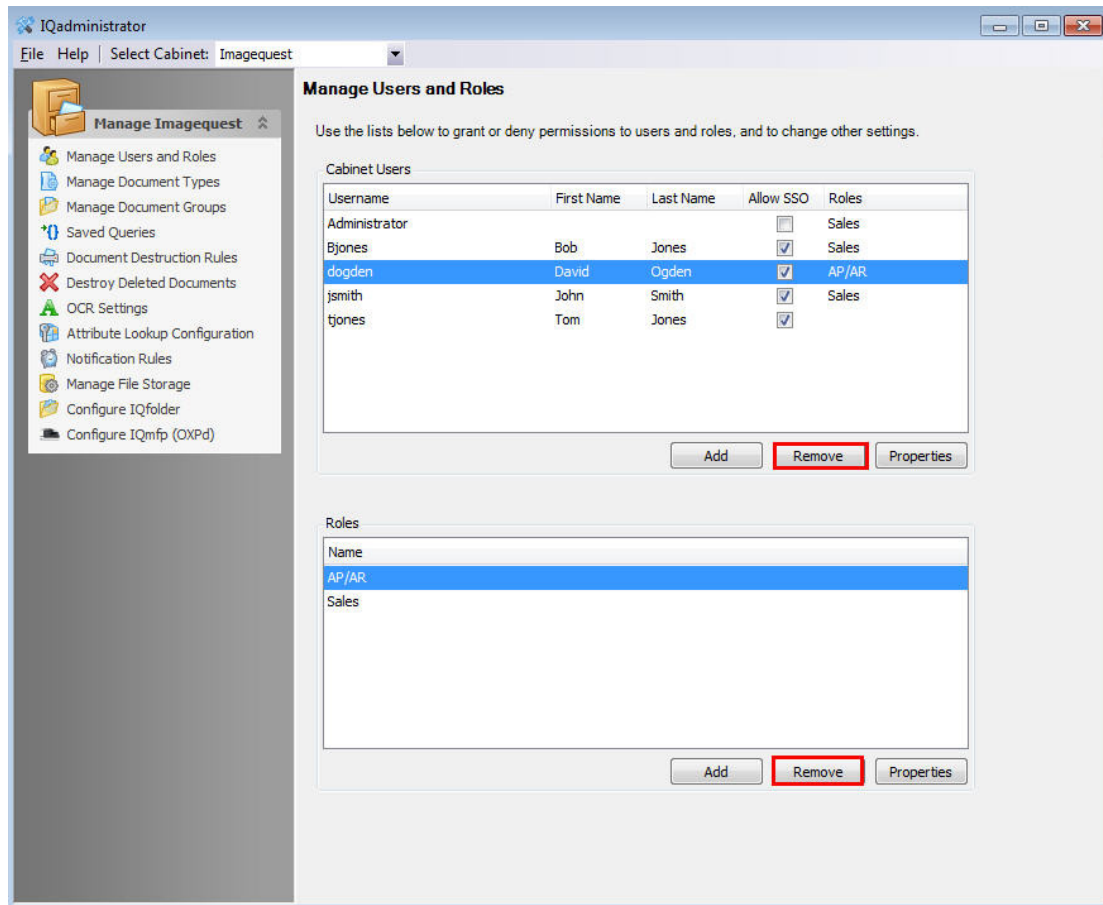
Membership in one or more roles can change the effective permissions for a user; for example, see the bottom portion of the “Action Permissions” and the “Document Permissions” tabs on the following page representing the user’s effective action and document type permissions for “Jsmith”.





## Removing Users or Roles

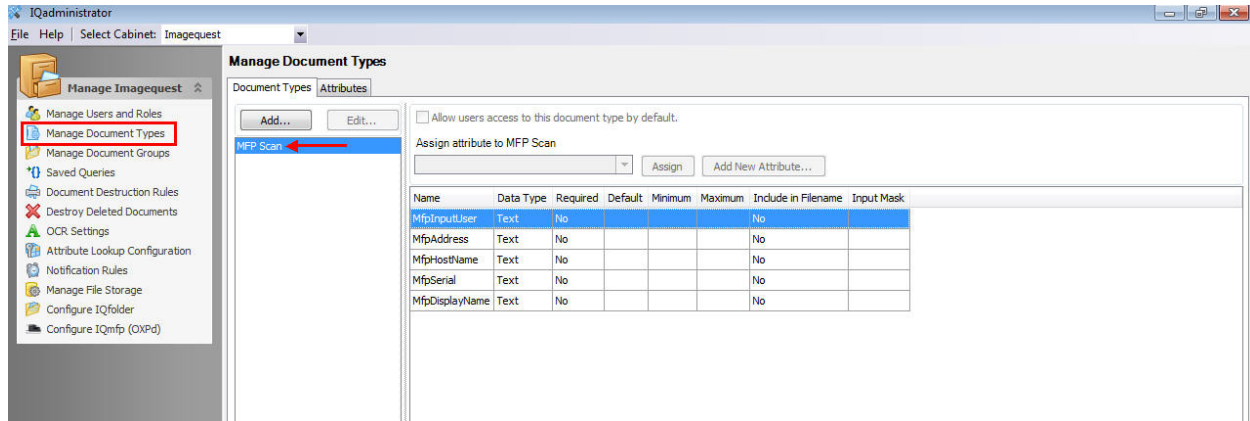
Users and roles can be removed from the Cabinet in **Manage Users and Roles** by clicking the “Remove” button as illustrated below.



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

## Manage Document Types

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



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

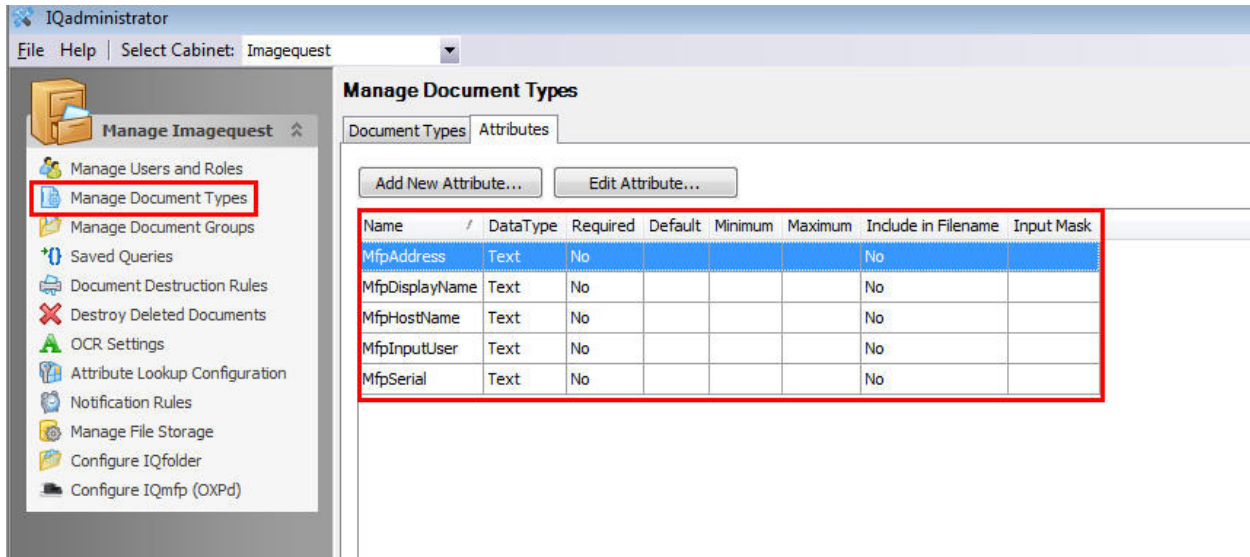
## Document Type Overview

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

## Attribute Overview

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

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

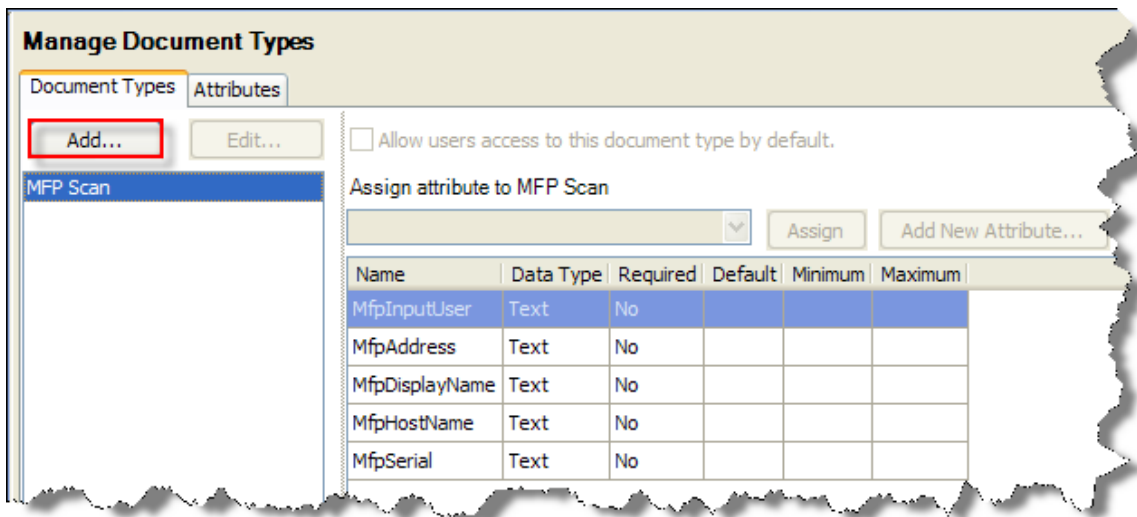


**Note:** Attributes may be created, edited and deleted from the “Attributes” tab.

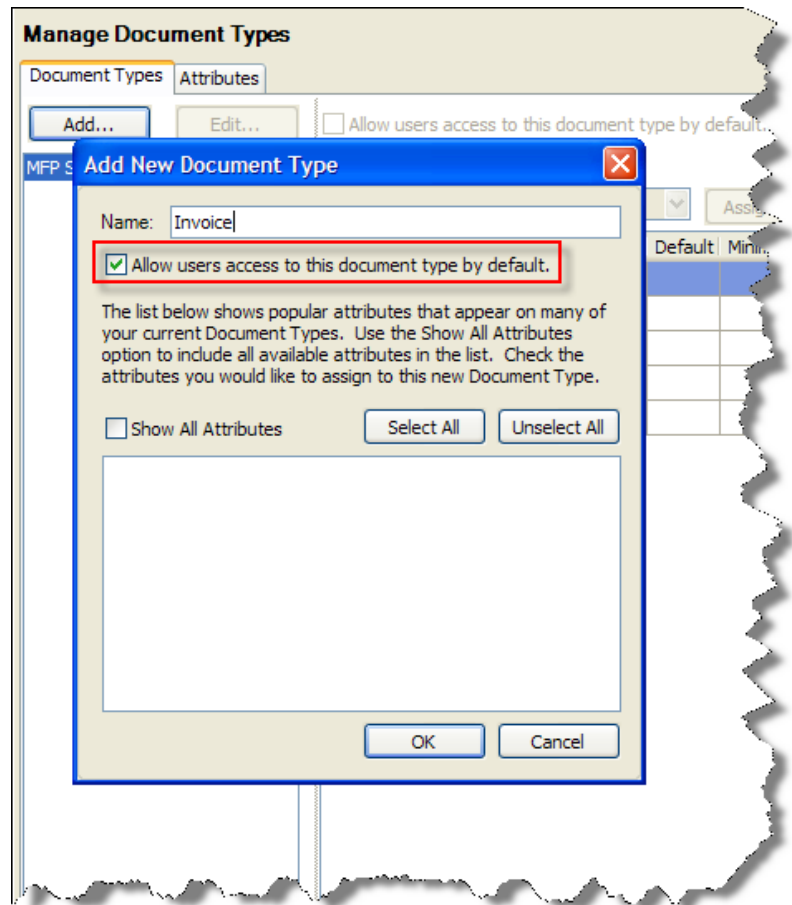
## Creating a New Document Type

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

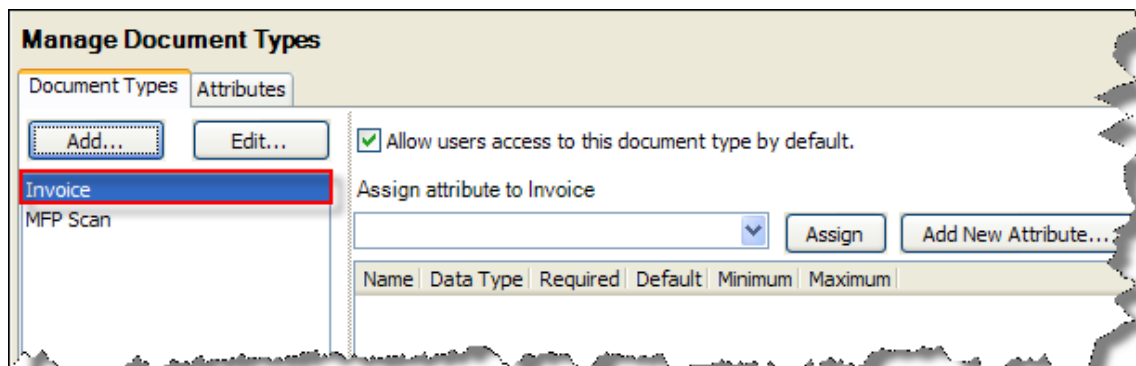
In **Manage Document Types**, click the “Document Types” tab to add a Document Type as illustrated below. Click “Add” to show the “Add New Document Type” dialog box.



Enter the name of the document as demonstrated on the following page. Below the name field, the Administrator may click the checkbox “Allow users access to this document type by default” only if it is desired for all users to have access to the Document Type. Click “OK” to save the new Document Type.

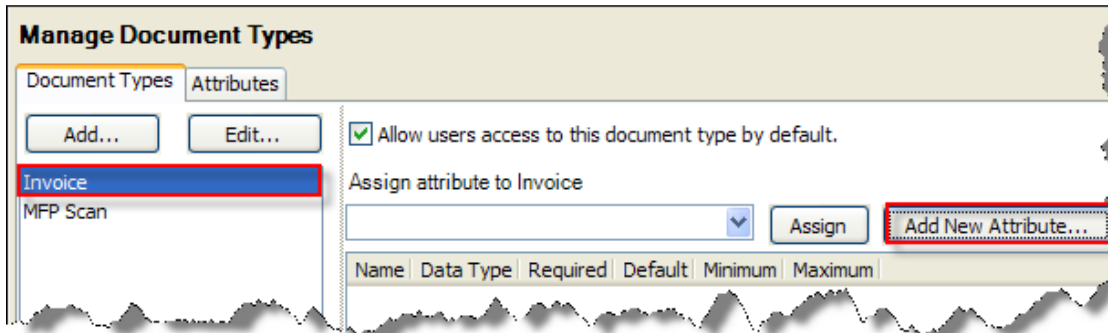


The screenshot below shows that the new document type, “Invoice,” has been created and is added to the “Document Types” tab in alphabetical order; the checkbox to the right of the tab is checked to allow users access.



## Creating and Assigning New Attributes

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



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

The screenshot shows the 'Add New Attribute' window. It contains the following sections:

- Attribute Name:** A text input field.
- Data Type:** A list of radio buttons for selecting the data type:
  - ☒ Text
  - ☐ Numeric
  - ☐ List
  - ☐ Integer
  - ☐ Date & Time
  - ☐ True/False
- Description:** A text area containing a description of text attributes and examples:
 

Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros.

Examples:

```
003-RBC0908
123-456-7890
(407) 555-1212
007
```
- Options:** A section with several input fields and checkboxes:
  - Minimum Length: [input field]
  - Maximum Length: [input field]
  - Default: [input field]
  - Input Mask: [dropdown menu]
  - ☐ Required
  - ☐ Include in filename
- Test Area:** A section with a text input field and a 'Test' button:
 

Test some input for storage in this Data Type: [input field] [Test]

At the bottom right, there are 'OK' and 'Cancel' buttons.

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

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

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

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

**Add New Attribute**

Attribute Name:

**Data Type**

- ☐ Text
- ☐ Numeric
- ☒ **List**
- ☐ Integer
- ☐ Date & Time
- ☐ True/False

**Description**

List-based attributes allow you to select an item from a list of choices you define. Items can optionally be defined as a category and subcategory, separated by a backslash (\).

Examples:

- A list of customers, from which you can choose Mary, Joe or Bob.
- A list of cities, from which you can choose London, Tokyo or Paris.
- A list of college courses such as the following:
  - Math\Algebra
  - Math\Calculus
  - Science\Biology
 from which you could then choose Math, then Algebra, or choose Science, then Biology.

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

**Options**

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

Default Value:

☐ Required

☐ Include in filename

☐ Items are of the form Category\Subcategory

**Test Area**

Test some input for storage in this Data Type:

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



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

**Add New Attribute**

Attribute Name: Patient Name

**Data Type**

☒ Text  
☐ Numeric  
☐ List  
☐ Integer  
☐ Date & Time  
☐ True/False

**Description**

Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros.

Examples:  
 003-RBC0908  
 123-456-7890  
 (407) 555-1212  
 007

**Options**

Minimum Length:  Input Mask:

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

Default:

☐ Required ☐ Include in filename

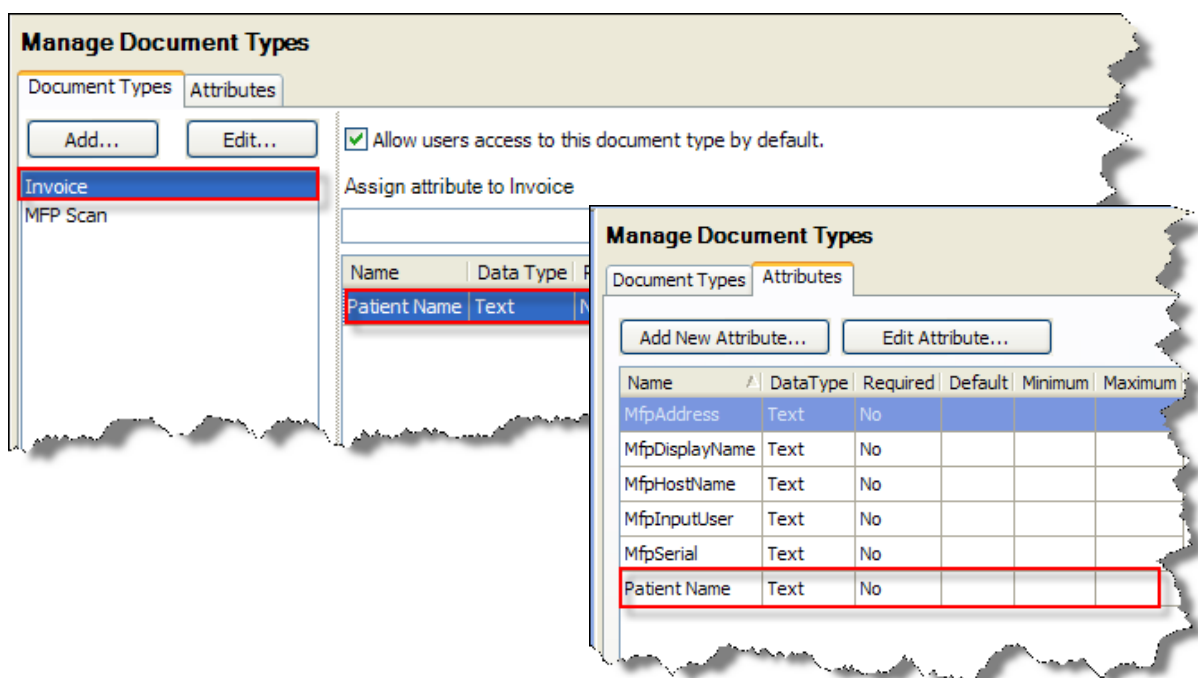
**Test Area**

Test some input for storage in this Data Type: Jane Doe

**Passed**

OK Cancel

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



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

## Input Masks

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

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

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

The pre-defined input mask for Numeric is "Currency".

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

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

**Add New Attribute**

Attribute Name:

**Data Type**

- ☒ Text
- ☐ Numeric
- ☐ List
- ☐ Integer
- ☐ Date & Time
- ☐ True/False

**Description**

Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros.

Examples:

- 003-RBC0908
- 123-456-7890
- (407) 555-1212
- 007

**Options**

Minimum Length:

Maximum Length:

Default:

Input Mask:  (dropdown menu shows: US Phone Number, Social Security Number)

☐ Required ☐ Include in filename

**Test Area**

Test some input for storage in this Data Type:

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

**Add New Attribute**

Attribute Name:

**Data Type**

- ☒ Text
- ☐ Numeric
- ☐ List
- ☐ Integer
- ☐ Date & Time
- ☐ True/False

**Description**

Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros.

Examples:

- 003-RBC0908
- 123-456-7890
- (407) 555-1212
- 007

**Options**

Minimum Length:

Maximum Length:

Default:

Input Mask:

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

☐ Required ☐ Include in filename

**Test Area**

Test some input for storage in this Data Type:

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

**Add New Attribute** Σ3

Attribute Name:

**Data Type**

- ☒ Text
- ☐ Numeric
- ☐ List
- ☐ Integer
- ☐ Date & Time
- ☐ True/False

**Description**

Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros.

Examples:  
003-RBC0908  
123-456-7890  
(407) 555-1212  
007

**Options**

Minimum Length  Input Mask:

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

Default

☐ Required ☐ Include in filename

**Test Area**

Test some input for storage in this Data Type:

**Passed**

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

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

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

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

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

**Add New Attribute**

Attribute Name:

**Data Type**

- ☒ Text
- ☐ Numeric
- ☐ List
- ☐ Integer
- ☐ Date & Time
- ☐ True/False

**Description**

Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros.

Examples:

```
003-RBC0908
123-456-7890
(407) 555-1212
007
```

**Options**

Minimum Length:

Maximum Length:

Default:

Input Mask:

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

☐ Required ☐ Include in filename

**Test Area**

Test some input for storage in this Data Type:

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

**Add New Attribute**

Attribute Name:

**Data Type**

- ☒ Text
- ☐ Numeric
- ☐ List
- ☐ Integer
- ☐ Date & Time
- ☐ True/False

**Description**

Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros.

Examples:  
 003-RBC0908  
 123-456-7890  
 (407) 555-1212  
 007

**Options**

Minimum Length:   
 Maximum Length:   
 Default:

Input Mask:

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

☐ Required ☐ Include in filename

**Test Area**

Test some input for storage in this Data Type:

**Passed**

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

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

**Note: Input Masks are not supported in WebIQ.**

## Custom Input Masks (Text)

### Metacharacters

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

The following table lists the available metacharacters:

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



## Special Characters

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

Character	Meaning
>	If a > character appears in the mask, all the characters that follow it are in uppercase until the end of the mask or until a < character is encountered.
<	If a < character appears in the mask, all the characters that follow it are in lowercase until the end of the mask or until a > character is encountered.
<>	If these two characters appear together in a mask, no case checking is performed and the data is formatted with the case used by the end-user during data entry.
/	A / character is used to separate the months, days, and years in dates. If the character that separates the months, days, and years is different in the regional settings of the system that the application runs on that character will be used instead.
:	A : character is used to separate the hours, minutes, and seconds in time values. If the character that separates the hours, minutes, and seconds is different in the regional settings of the system that the application runs on that character will be used instead.
\$	A \$ character is used to designate currency values. If the character that designates the currency values is different in the regional settings of the system that the application runs on that character is used instead.

## Literal Characters

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

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

## Examples

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

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

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

(a value is not entered)

(a value is entered)

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

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

(a valid phone number without a code part)

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

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

(a value is not entered)

(a value is entered)

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

## Custom Input Masks (Numeric/Integer)

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

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

Input Mask Character	Name	Description	Samples Culture: English (USA)
C or c	Currency	<p>The mask for entering a currency amount. The input mask contains a value part which can be edited by an end-user, and a currency symbol which cannot be edited. The mask's format is determined by the current culture.</p> <p>The precision specifier indicates the desired number of decimal places. If the precision specifier is omitted, the precision will be set to 2.</p>	<div>\$1,024.50</div> <div>(EditMask = "c"; EditValue = 1024.5)</div> <div>\$20,010</div> <div>(EditMask = "c0"; EditValue = 20010)</div>
D or d	Decimal	<p>The mask for entering integer values of a fixed and flexible length.</p> <p>The precision specifier indicates the maximum number of digits that can be entered. If the precision specifier is equal to 0 or omitted, the length of the input string is not limited.</p> <p>If the editor's value is real, the fractional part of the value will be discarded during editing.</p>	<div>1501</div> <div>(EditMask = "d"; EditValue = 1501)</div>
F or f G or g	Fixed-point	<p>The mask for entering real numbers with a fixed-length fractional part.</p> <p>The precision specifier indicates the desired number of decimal places. If the precision specifier is omitted, the precision will be set to 2.</p>	<div>1024.50</div> <div>(EditMask = "f"; EditValue = 1024.5)</div>

N or n	Number	<p>The mask for entering the integers of real values. Thousand separators are inserted between each group of three digits to the left of the decimal point.</p> <p>The precision specifier indicates the desired number of decimal places. If the precision specifier is omitted, the precision will be set to 2.</p>	<div>1,024.50</div> <p>(EditMask = "n"; EditValue = 1024.5)</p>
P	Percent (mode 1)	<p>The mask for entering percents. The entered string is converted into a number "as is" (compare with the 'p' mask). So, if the "15 %" string is entered, the editor's value will be 15.</p> <p>The precision specifier indicates the desired number of decimal places. If the precision specifier is omitted, the precision will be set to 2.</p>	<div>25.00 %</div> <p>(EditMask = "P"; EditValue = 25)</p>
p	Percent (mode 2)	<p>The mask for entering percents. The entered string is converted to a number and then divided by 100. The result is used as the editor's value (compare with the 'P' mask). So, if the "15 %" string is entered the editor's value will be 0.15.</p> <p>The precision specifier indicates the desired number of decimal places. If the precision specifier is omitted, the precision will be set to 2.</p>	<div>25.00 %</div> <p>(EditMask = "p"; EditValue = 0.25)</p>

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

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

\$	Currency character	Defines the position of the currency symbol determined by the current culture.
Any other character	Literal character	Any other characters that appear in the mask are inserted into the edit box literally.  To display special characters in the edit box literally, they should be preceded with the escape character ('\').

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

### End-User Capabilities

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

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

### Examples

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

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

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

(Stored Value = 3080.6)

(Stored Value = -3080.6)

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

(Stored Value = -3080.6)

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

### Category\Subcategory List Attribute Type

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

**Modify Attribute**

Attribute Name:

**Data Type**

☐ Text  
☐ Numeric  
☒ List  
☐ Integer  
☐ Date & Time  
☐ True/False

**Description**

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

**Options**

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

Default Value:

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

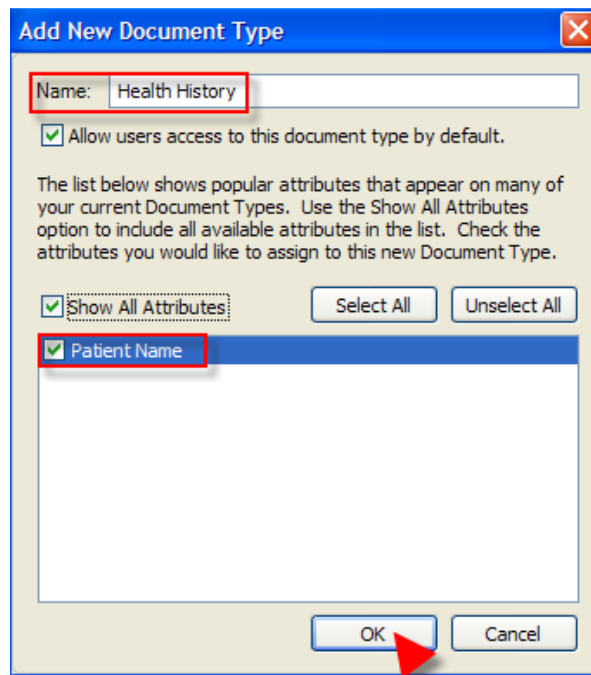
The screenshot illustrates the 'Location' selection process in the ImageQuest interface. On the left, a 'Location' dropdown menu is shown. Below it, the 'Category:' dropdown is set to 'New York'. The 'Subcategory:' dropdown is open, displaying a list of subcategories: Albany, Buffalo, Commack, and New York. The 'Albany' option is highlighted. To the right, a 'Location' field displays the selected path 'New York\Albany'.

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



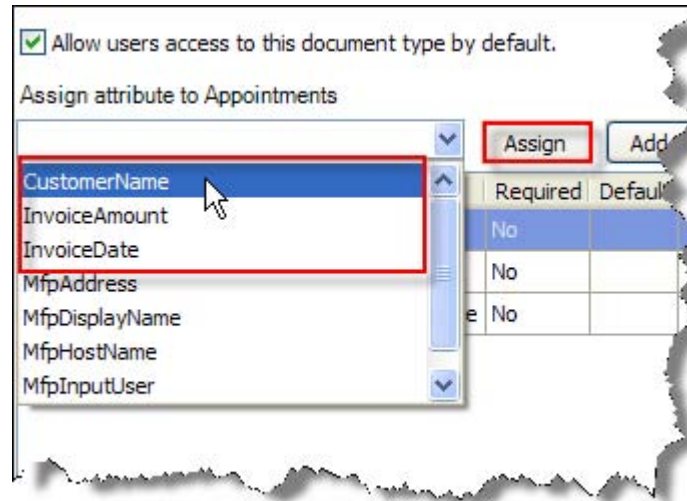
## Sharing Existing Attributes

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



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

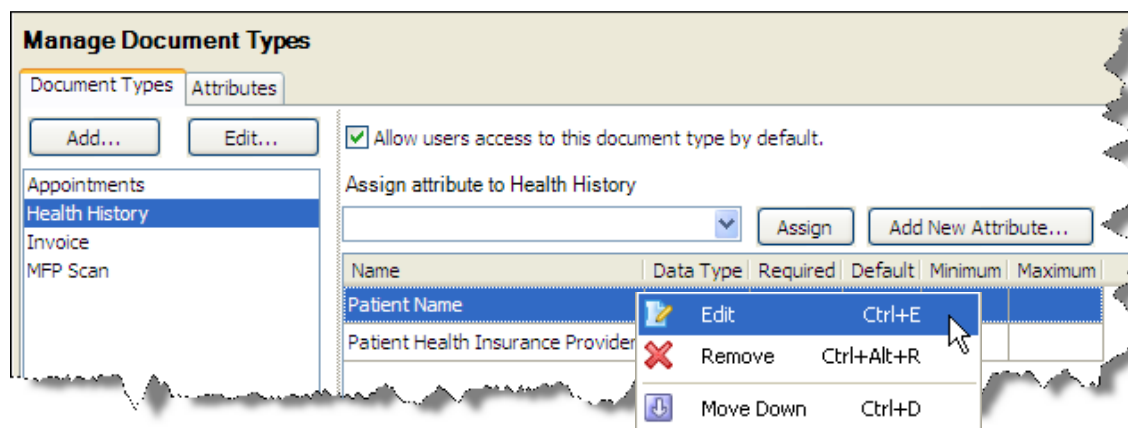
Existing attributes can also be assigned from the document types tab by highlighting a document type, clicking the drop down arrow, highlighting an attribute and clicking the “Assign” button as illustrated below.



## Editing, Removing and Reordering Attributes

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

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



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

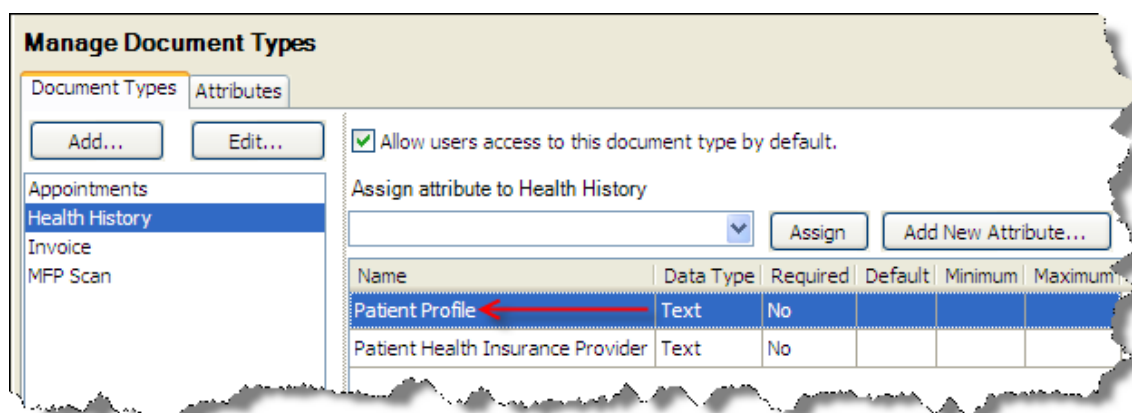
The screenshot shows a 'Modify Attribute' dialog box with a blue title bar. The 'Attribute Name' field is highlighted with a red box and contains the text 'Patient Name'. Below this, there are two main sections: 'Data Type' and 'Description'. The 'Data Type' section has radio buttons for 'Text' (selected), 'Numeric', 'List', 'Integer', 'Date & Time', and 'True/False'. The 'Description' section contains text explaining that text attributes can store combinations of letters, numbers, and punctuation, with examples like '003-RBC0908', '123-456-7890', '(407) 555-1212', and '007'. At the bottom, there is an 'Options' section with a 'Minimum Length' field.

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

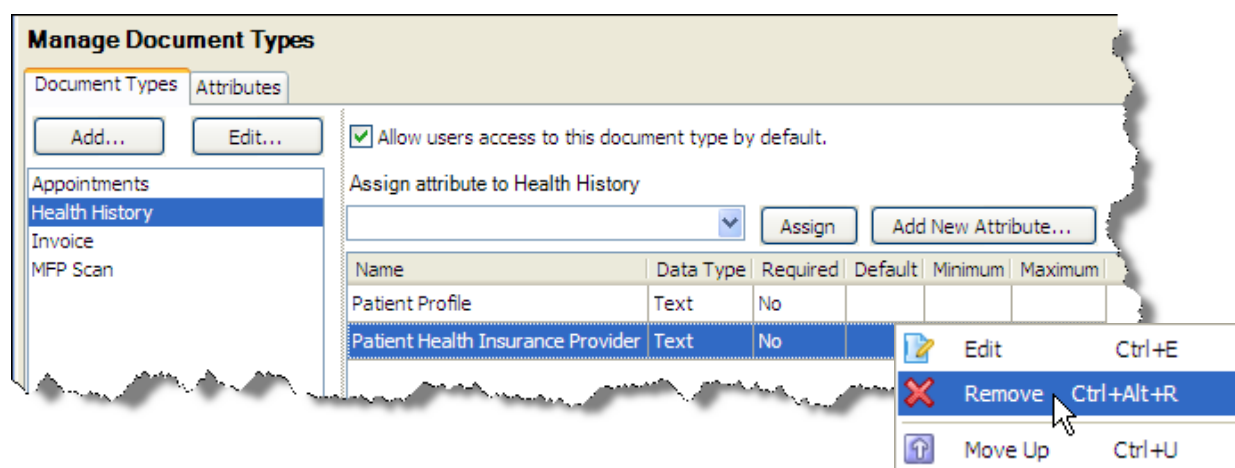
This screenshot is similar to the previous one, but the 'Attribute Name' field now contains 'Patient Profile'. The 'Data Type' and 'Description' sections remain the same, with 'Text' selected as the data type and the same descriptive text and examples provided.

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

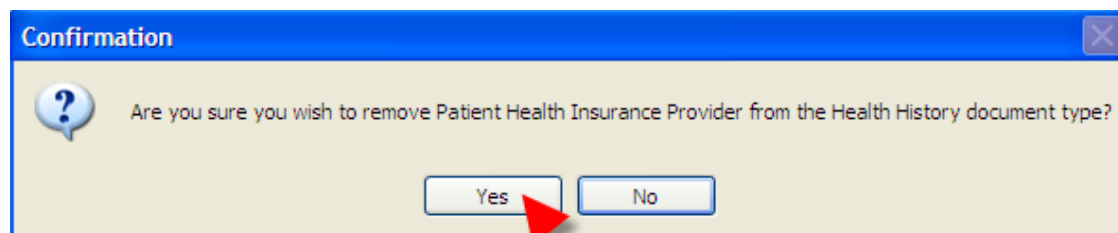
Now you will see the update in the attribute list for the Document Type "Health History" in the document types tab as shown on the following page.



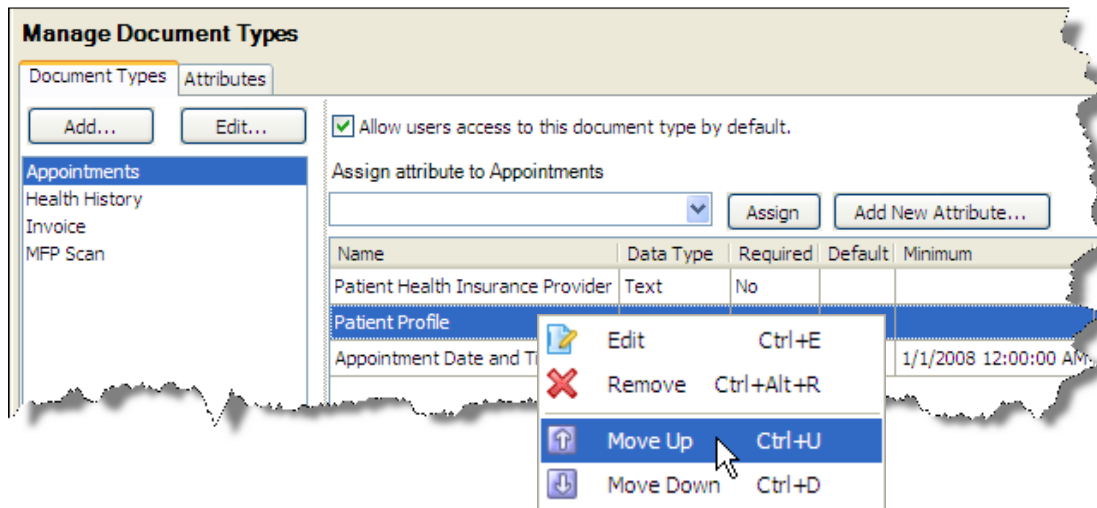
Attributes can be unassigned or removed from Document Types. For example, attribute “Patient Health Insurance Provider” is no longer needed for Document Type “Health History”. Select the Document Type, right-click the attribute and select “Remove” from the menu. See below.



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

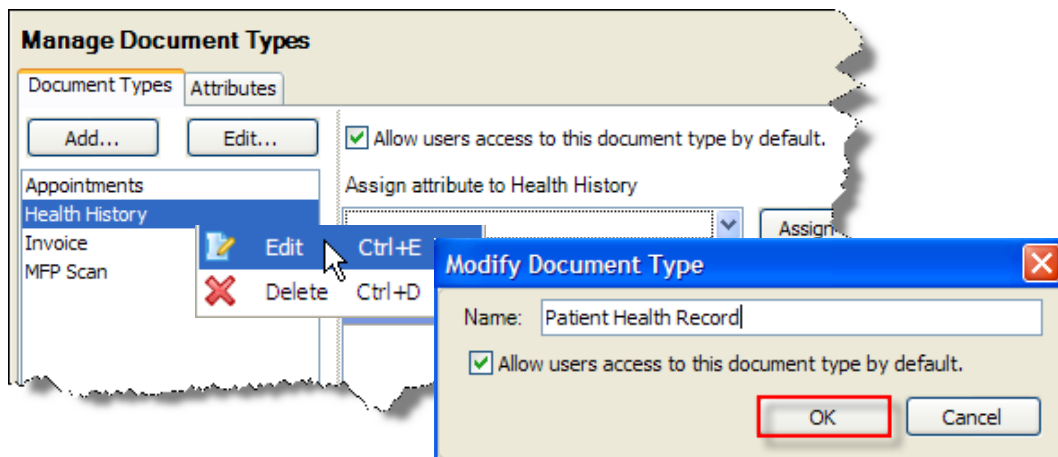


Attributes can also be reordered for indexing purposes on the document type level. By default, the attributes are displayed in the order in which they were assigned to the document type. It may make more sense to have the attributes in a specific order, for example Street, City, State, and Zip. If there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

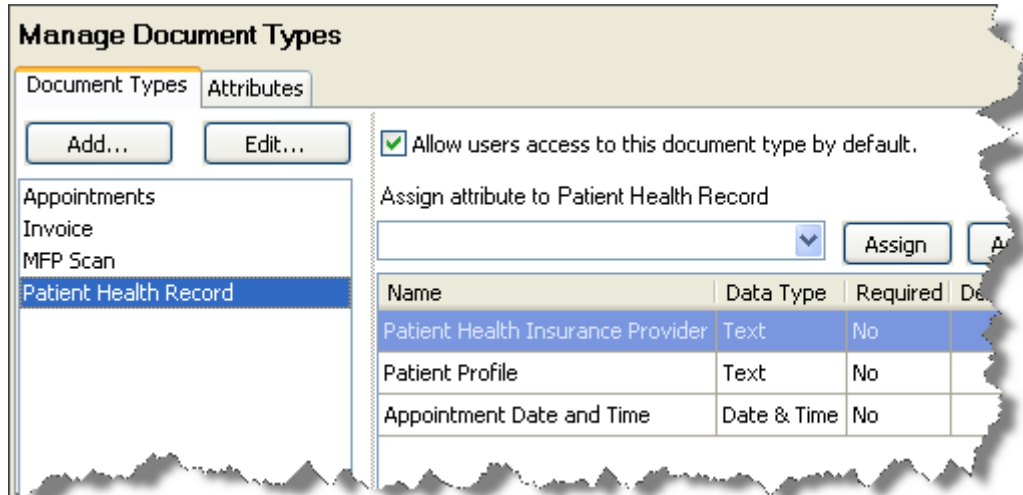


## Editing and Removing Document Types

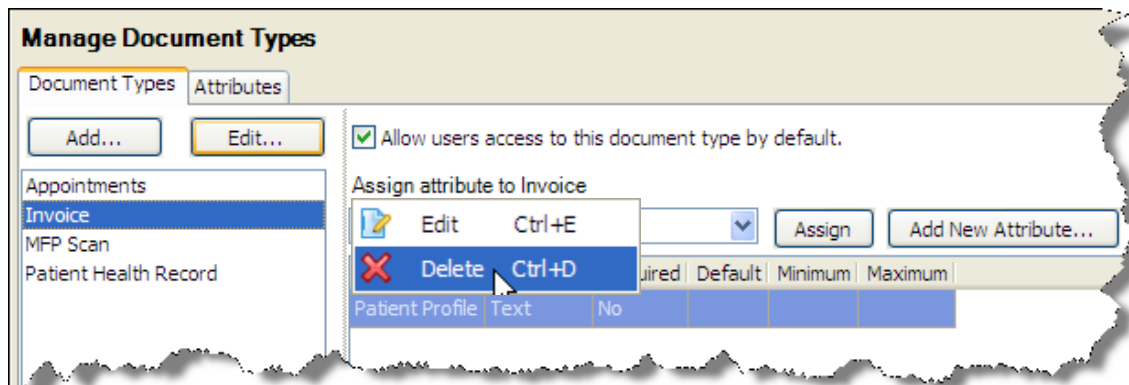
To edit a Document Type, right-click the Document Type and select “Edit” in the menu as shown below. The “Modify Document Type” window will appear with the Document Type name highlighted. For example, the Document Type “Health History” is being modified here. Type in the new title, “Patient Health Record”,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



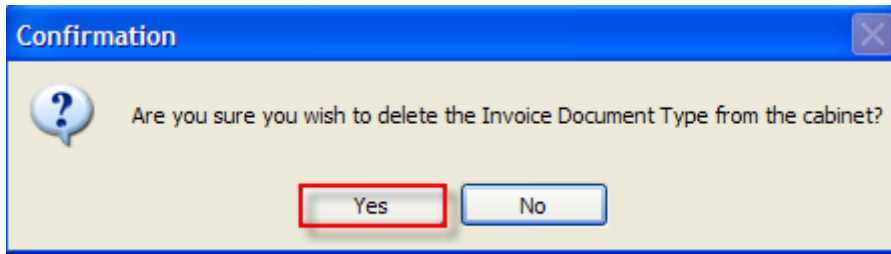
Once you click "OK", you will see that "Health History" has been renamed to "Patient Health Record" as highlighted on the following page.



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



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

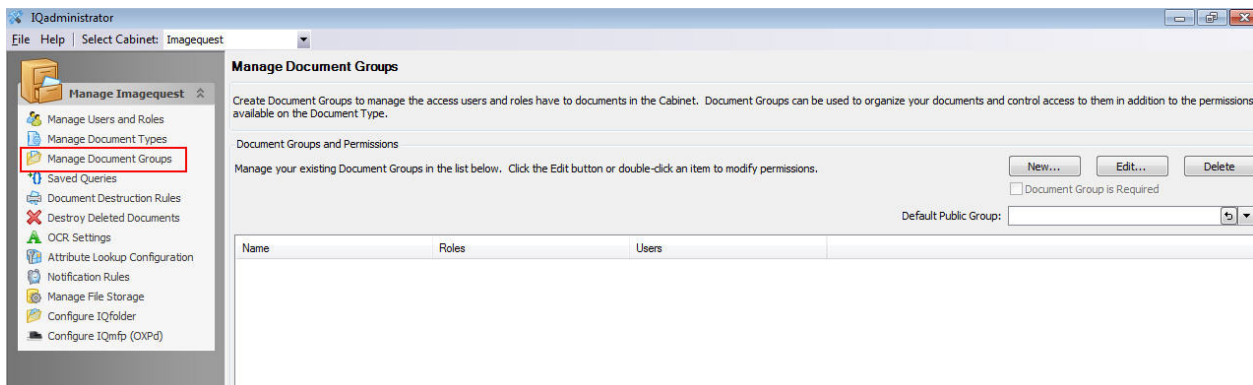


**Note:** If a Document Type or Attribute is in use by one or more existing documents, they cannot be deleted. This also includes documents that have been flagged as deleted.

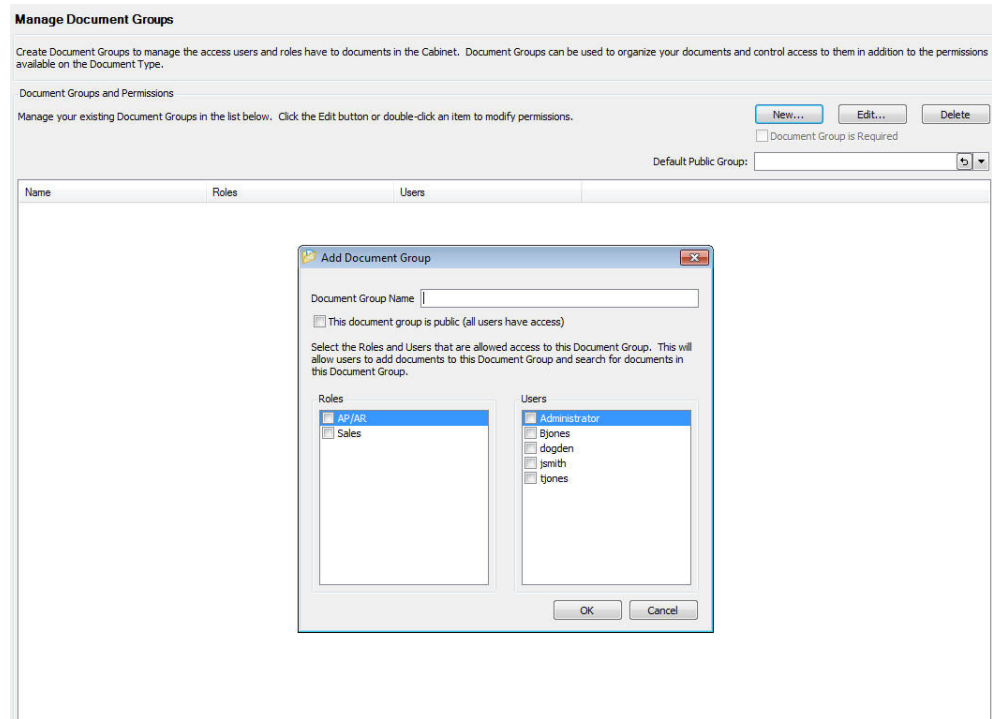
## Manage Document Groups

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

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



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

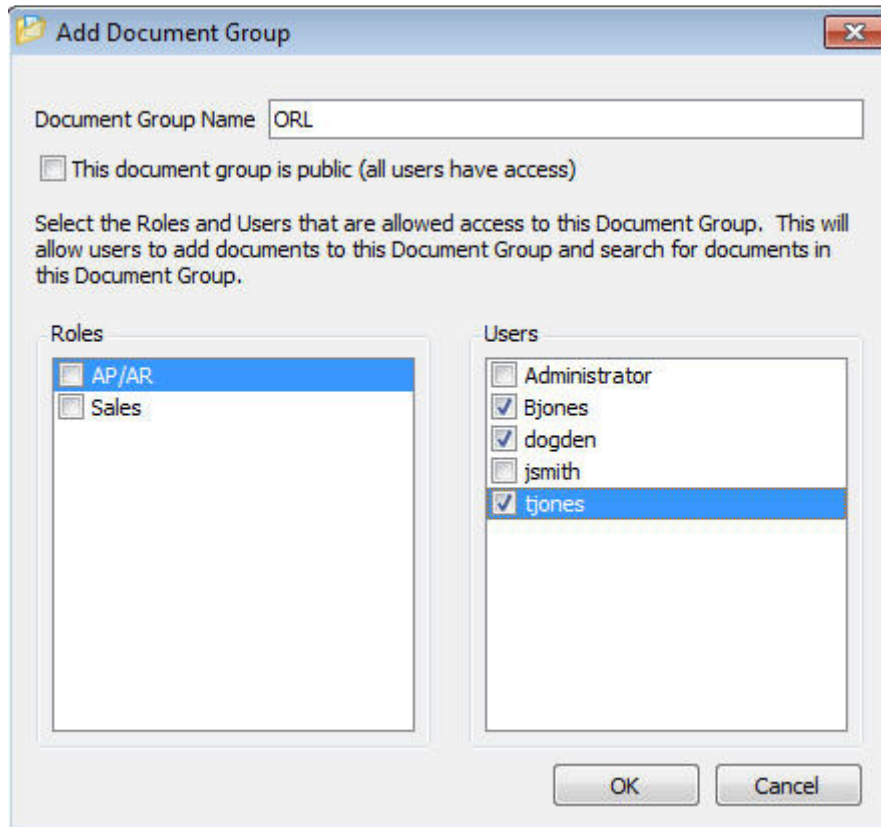


For example, a company receives invoices from three cities: Atlanta, Orlando and Phoenix. Each of these cities has a Sales Manager assigned to it. Only the Sales Manager and the company's CFO are allowed access to the Invoice documents in the Cabinet for each location. The Administrator can create a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

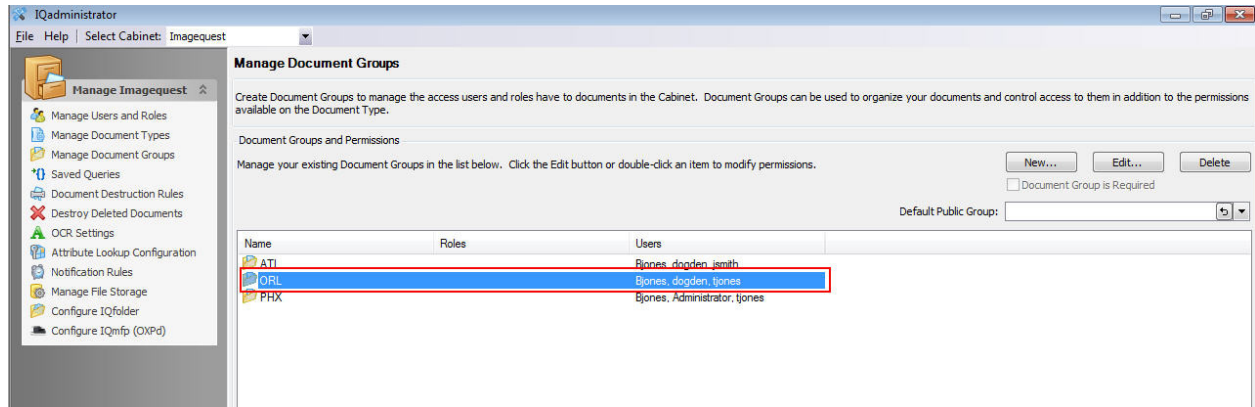
**Note:** The list of users in each document group must also include the user assigned to indexing incoming documents. By including this user in each group, the indexer is able to assign incoming documents to their respective group.



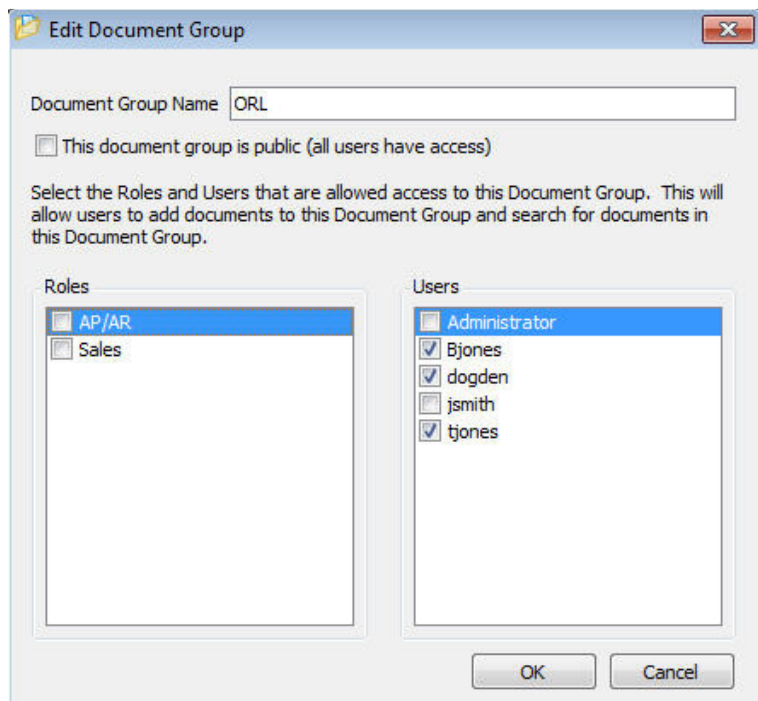
In the screenshot below, "ORL" is entered in the "Document Group Name" field. The Sales Manager "Bjones", the CFO "dogden" and the indexer "tjones" are selected in the "User" list. Note that each user selected receives a check in the box to the left of their name to confirm the selection. Click "OK"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



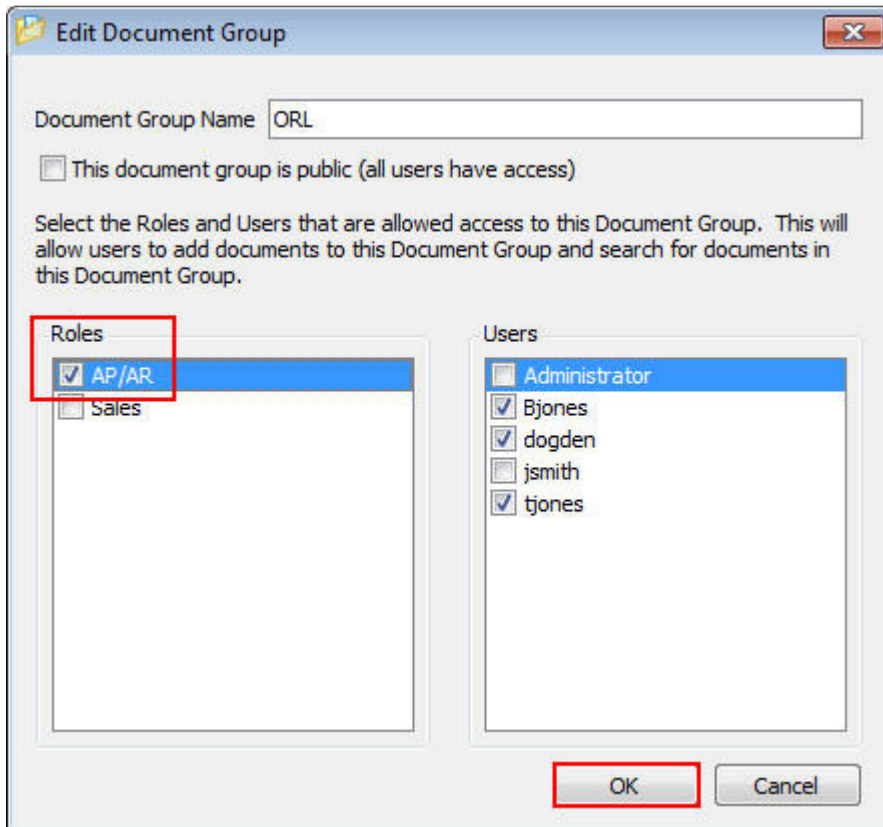
The Document Groups and Permissions list will show each group that has been added and displays the group "Name" and the names of the "Roles" and "Users" that are members of the group as seen on the following page. "ORL" is listed under "Name" and "Bjones", "dogden", and "tjones" are listed under "Users".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



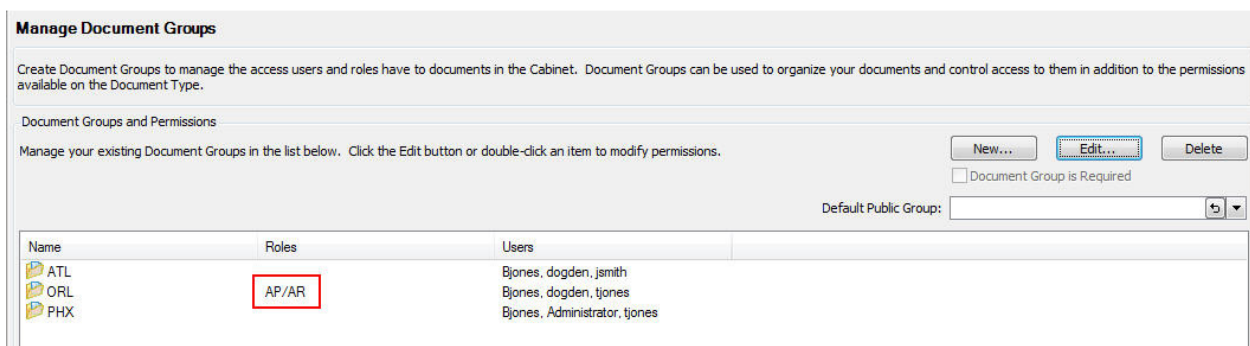
To edit a Document Group, double-click the group “Name” or select the group and click “Edit” to open the “Edit Document Group” window. See below. In this window, you can change the “Document Group Name” or add or remove Roles or Users in the group.



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

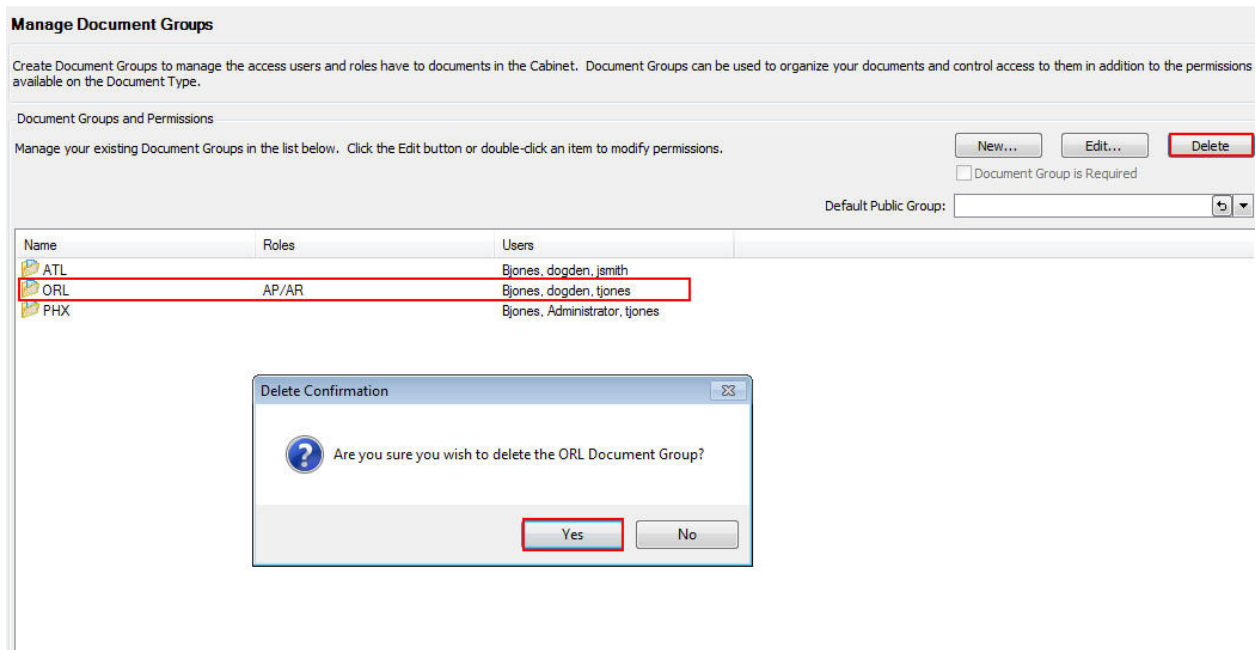


Once all edits are made, click “OK” to save the changes and update the Document Groups and Permissions list as shown below. Clicking “Cancel” will close the “Edit Document Group” window and the changes will not be saved.



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

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



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

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

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



Document Groups and Permissions

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

New... Edit... Delete

☒ Document Group is Required

Default Public Group: Public Group

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

Please see the *ImageQuest 11.0 User's Guide* for more information on how to add and search for documents assigned to Document Groups.

## Saved Queries

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

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

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

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

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

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

**Saved Queries**

Select Query

Name

Query

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

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

**Saved Queries**

Select Query: Client ID Search [v] [New] [Remove]

Name: Client ID Search

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

Query: [Client ID] = '{?Client ID: Enter the Client ID}'

[Check Syntax] [Save] [Cancel]

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

**Parameter Prompt**

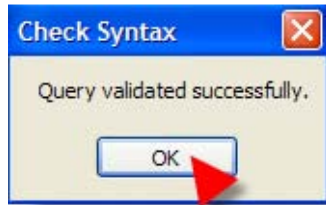
Please supply values for the following query parameters:

Enter the Client ID:	50
----------------------	----

[OK] [Cancel]



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



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

See below for other syntax examples for creating new queries.

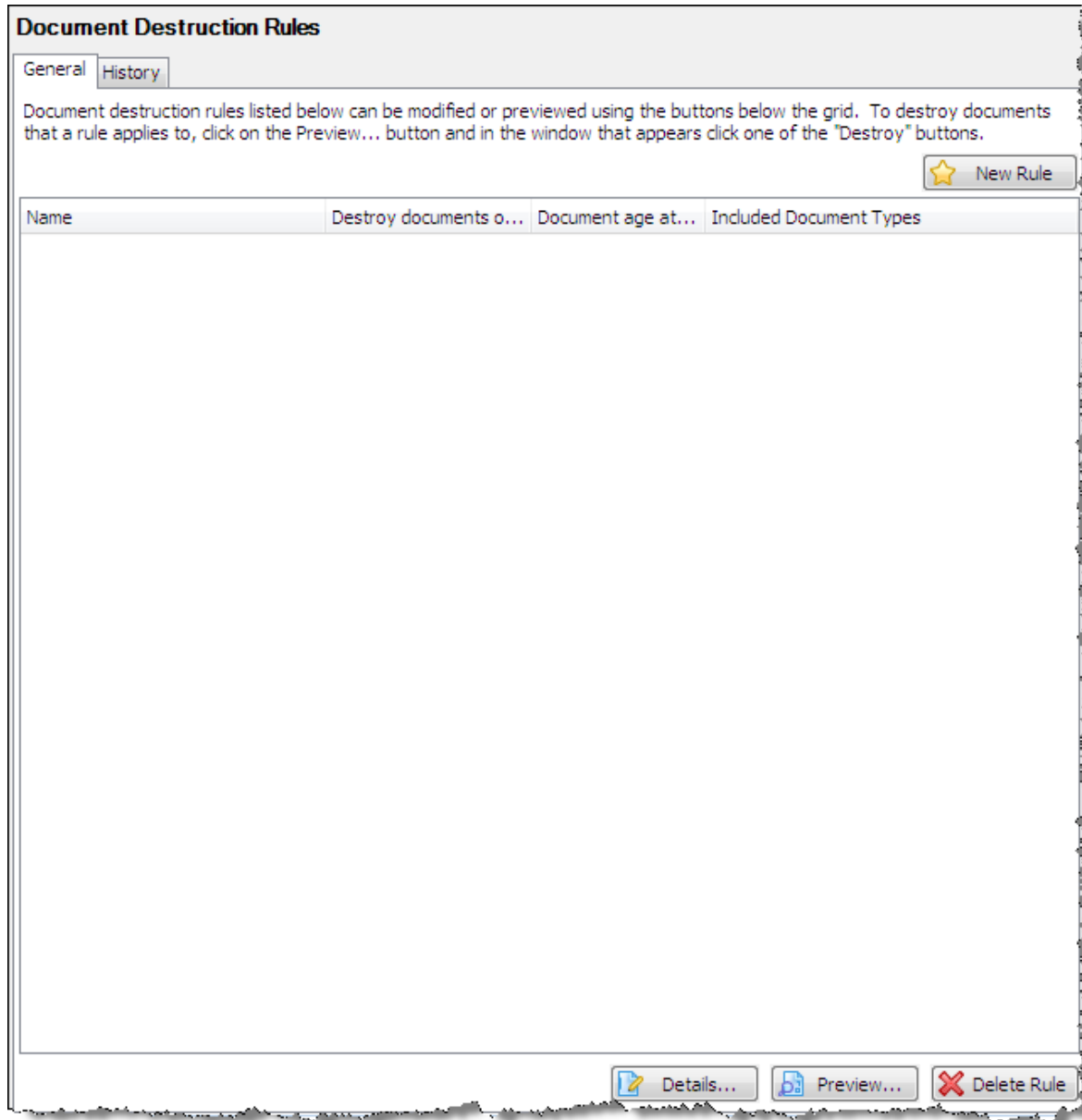
Query Syntax Example	Result
<code>[Employee Number] = '{?Employee Number: Enter an Employee Number}'</code>	Prompts the user to enter an employee number and searches across all Document Types for that value
<code>[DocumentType] IN ('W-4', 'Form I-9') AND ([Employee Number] = '{?Employee Number: Enter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

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

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

## Document Destruction Rules

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



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

Type a meaningful name in the “Name” field and select which Document Type(s) apply to the rule. In the “Destroy documents that are older than” section, change the numeric value and select “Days” or

“Years” from the drop-down and then select an ImageQuest Date & Time attribute from the drop-down list in the “Determine document age using attribute” section.

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

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

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

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

In the example below, the administrator enters “Active=False” so the rule will only apply to Employee Files where the value for attribute Active is False. After the configuration of the rule is complete, click “OK” to save the new rule.

**Add Document Destruction Rule**

**Rule Details**

Name:

Document Types:

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

Destroy documents that are older than:

Determine document age using attribute:

Specify additional criteria for documents to be destroyed using IQQL.


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

**Document Destruction Rules**

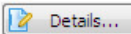
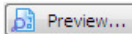

General

History

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

 New Rule

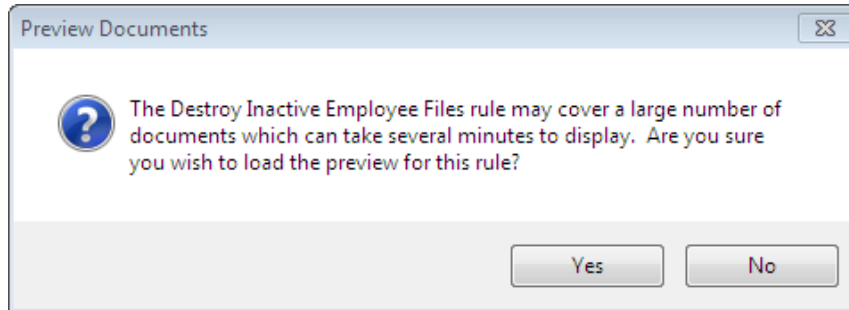
Name	Destroy documents o...	Document age at...	Included Document Types
Destroy Inactive Employee Files	1 Years	InactiveDate	Employee Record

 Details...  Preview...  Delete Rule

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

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

For this example, the administrator clicks “Yes”.



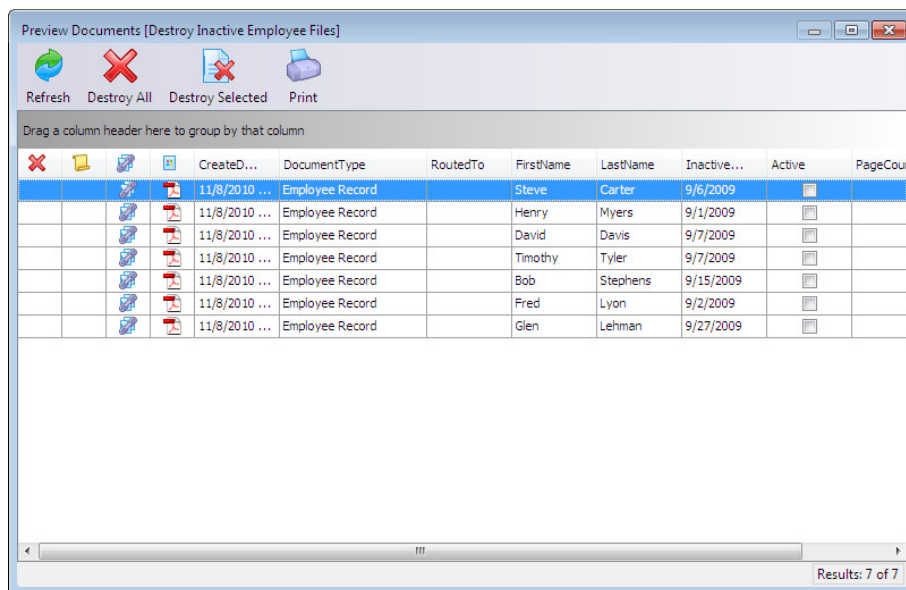
The “Preview Documents” window loads and includes the rule name in the title bar. The example below displays 7 documents. At this point, the administrator has a few different options:

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

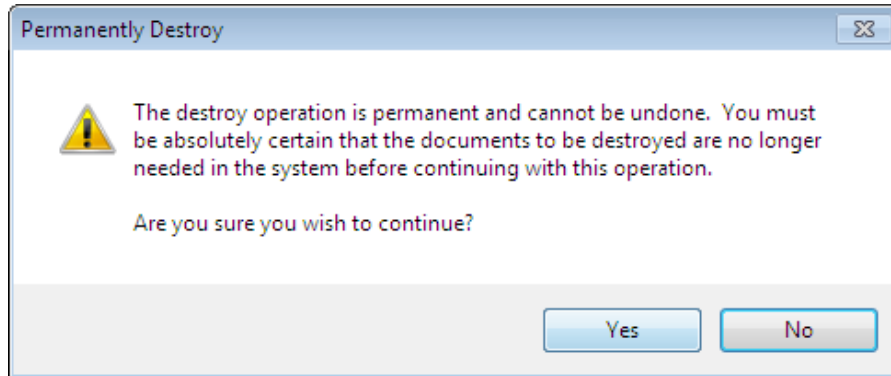
“Destroy Selected” will permanently destroy only the documents highlighted (selected) in the grid.

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

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



When the administrator selects “Destroy All” or “Destroy Selected”, the message below is displayed.



Click “Yes” to continue and perform the operation.

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

For this example, the administrator selects “Yes”.

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

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

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

**Document Destruction Rules**

General History

Rule execution history

RunDateTime	Rule	Username	Results
11/8/2010 4:13:05 PM	Destroy Inactive Employee Files	DEVELOPMENT\Administr...	7 selected, 7 destroyed, 0 failed
DocumentType IN ('Employee Record') AND (Active=False) AND ([InactiveDate] <=			
11/8/2010 3:11:15 PM	[SYSTEM] - Destroy deleted documents	DEVELOPMENT\Administr...	7 selected, 7 destroyed, 0 failed
([Deleted] = True) AND ([CreateDateTime] <= '11/1/2010 3:11:15 PM')			

**History entry details**

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

Rule: Destroy Inactive Employee Files

Username: DEVELOPMENT\Administrator on WIN7X64B

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

Results: 7 selected, 7 destroyed, 0 failed

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



## Destroy Deleted Documents

Prior to ImageQuest version 10.3, documents could only be flagged as Deleted, but this did not remove the database record or delete the physical file from disk. ImageQuest 10.3 introduces two new features: Document Destruction Rules and Destroy Deleted Documents, which allow documents and related data to be permanently “destroyed”. When document destruction is performed on a group of documents, the documents and document data are physically and permanently destroyed. Destroyed documents can longer be accessed in ImageQuest and also cannot be restored.

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

### Destroy Deleted Documents

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

Choose an option

☒ Destroy deleted documents that were created  Days  ago.

☐ Destroy all deleted documents in the system.

Rule execution history

RunDateTime	Rule	Username	Results

#### History entry details

RunDateTime:

Rule:

Username:

Details:

Results:

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

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

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


**Destroy Deleted Documents**

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

Choose an option

☒ Destroy deleted documents that were created   ago.

☐ Destroy all deleted documents in the system.

 Preview...

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

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

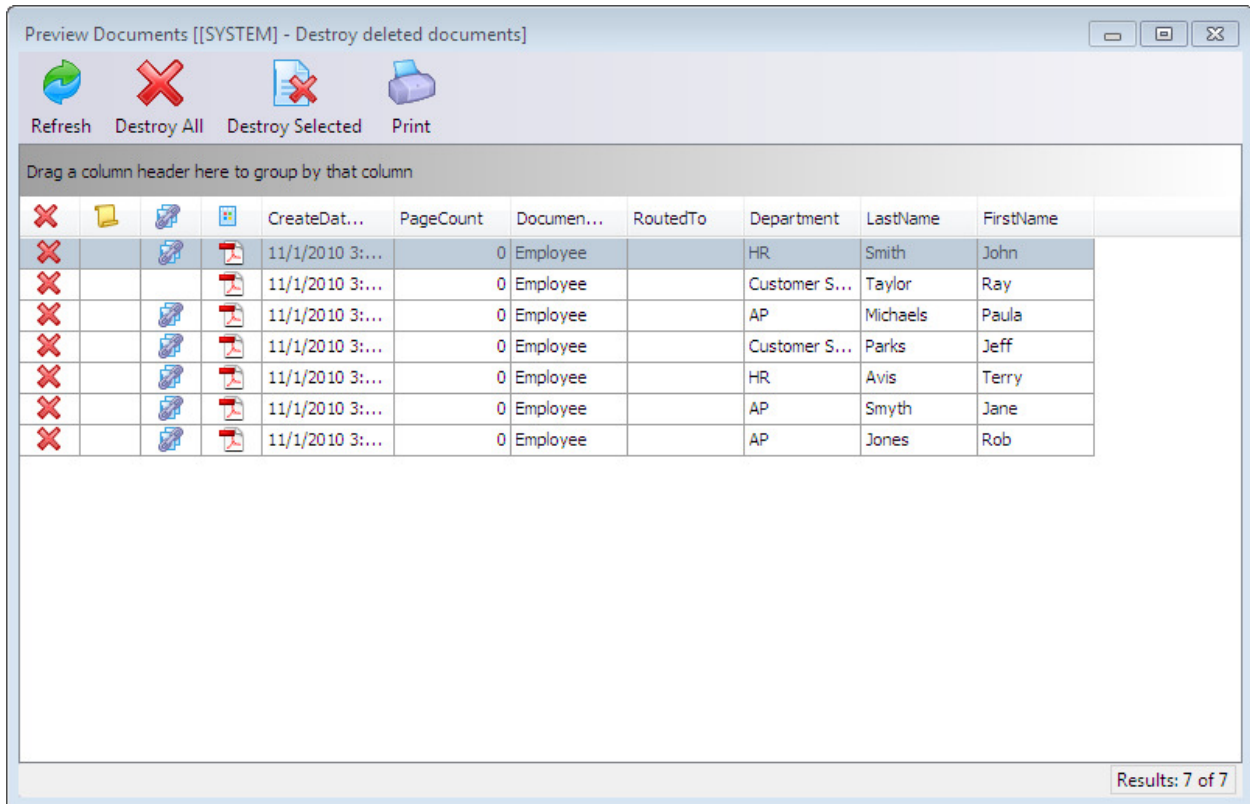
“Destroy Selected” will permanently destroy only the documents highlighted (selected) in the grid. The administrator can hold down the CTRL key to select multiple documents.

The “Refresh” button refreshes the current display.

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

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

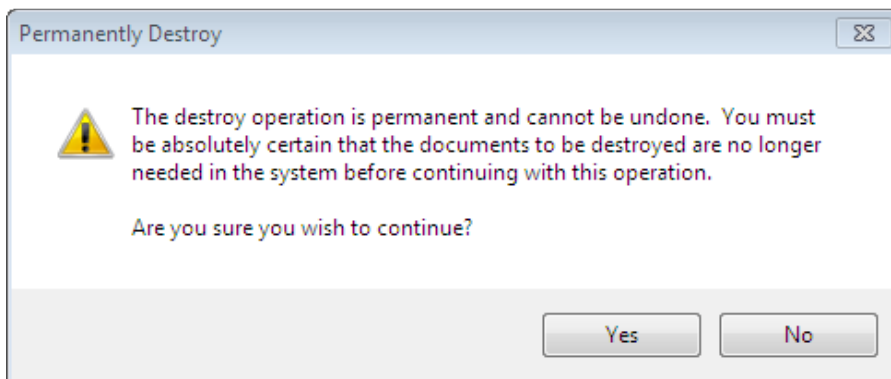
For this example, the administrator will select “Destroy All”.



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

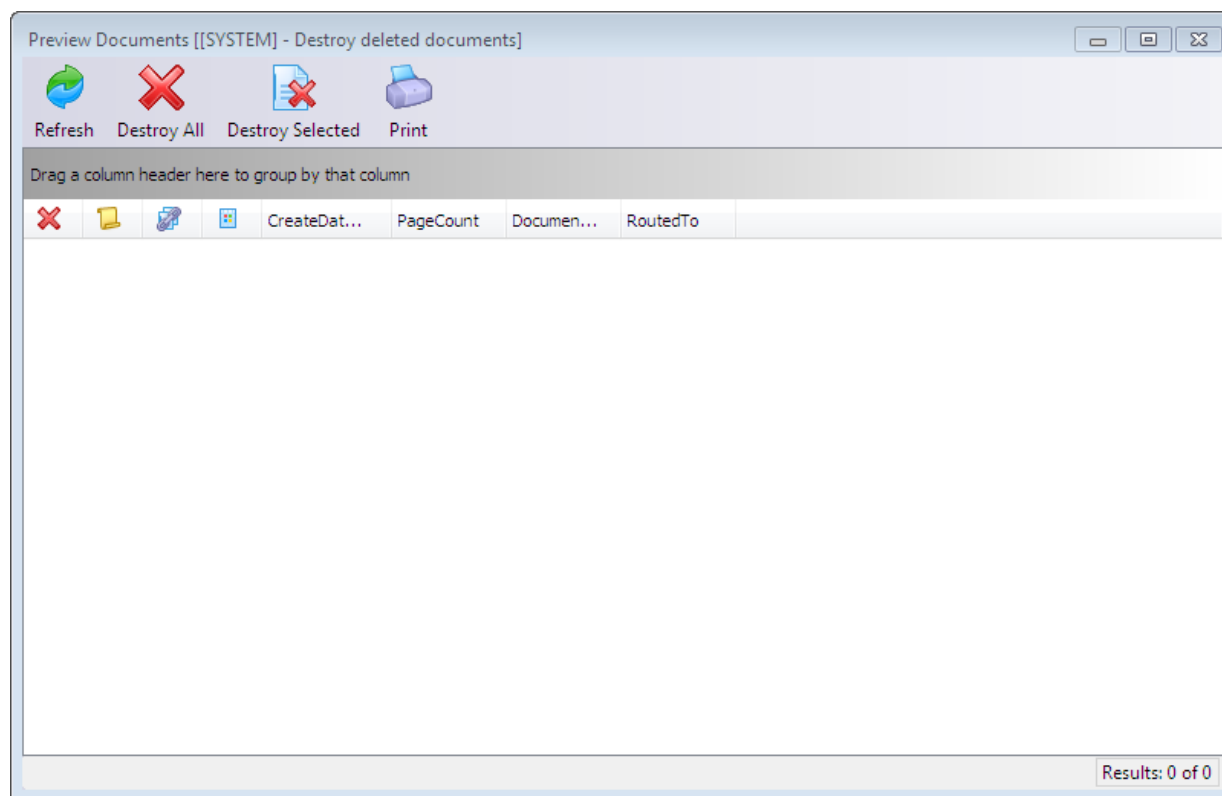
Click “No” to cancel the operation and return to the Preview Documents window and none of the documents will be destroyed.

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



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

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



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

Rule execution history

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

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

---

**History entry details**

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

Rule: [SYSTEM] - Destroy deleted documents

Username: DEVELOPMENT\Administrator on WIN7X64B

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

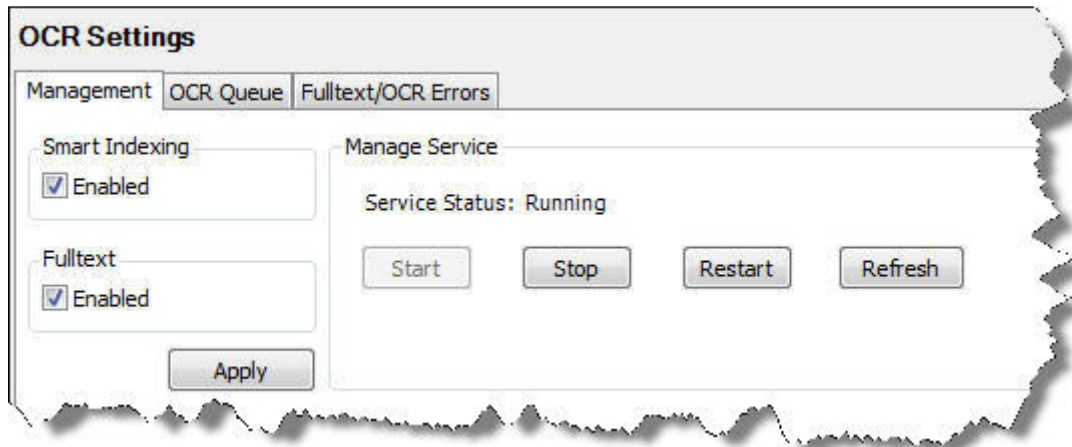
Results: 7 selected, 7 destroyed, 0 failed

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

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

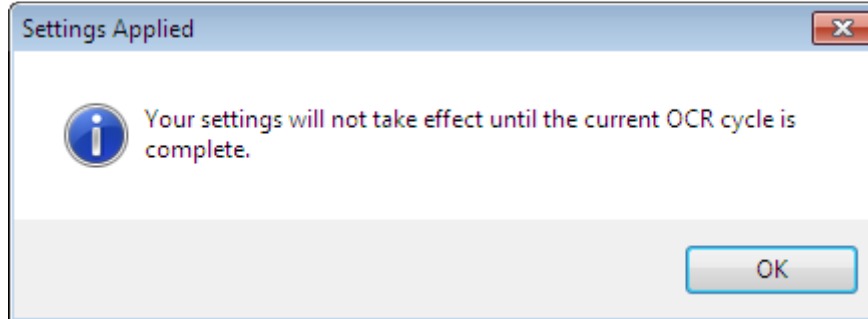
## OCR Settings

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



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

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



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

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

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

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

**OCR Settings**

Management OCR Queue Fulltext/OCR Errors

Drag a column header here to group by that column

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

Refresh

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

**OCR Settings**

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

Drag a column header here to group by that column

Document ID	DocumentType	FileType	CreateDateTime	Failed	Message
985ba3b1-1da3-468d-ad1f-f43ba749c7a8	Invoice	TIF	12/6/2011 2:44:24 PM	12/6/2011 2:45 PM	OCR export Failed: OCR Engine error code [IMG_SIZE_ERR] IMG_SIZE_ERR: Non-supported in
f1aee776-af39-4564-8c38-c33029e578ae	Invoice	TIF	12/6/2011 2:44:32 PM	12/6/2011 2:44 PM	OCR export Failed: OCR Engine error code [IMG_SIZE_ERR] IMG_SIZE_ERR: Non-supported in

Reprocess ☒ and clear

Clear Selected Clear All Refresh



## Attribute Lookup Configuration

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

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

### Attribute Lookup Configuration

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

Key Field:

ODBC Connection String

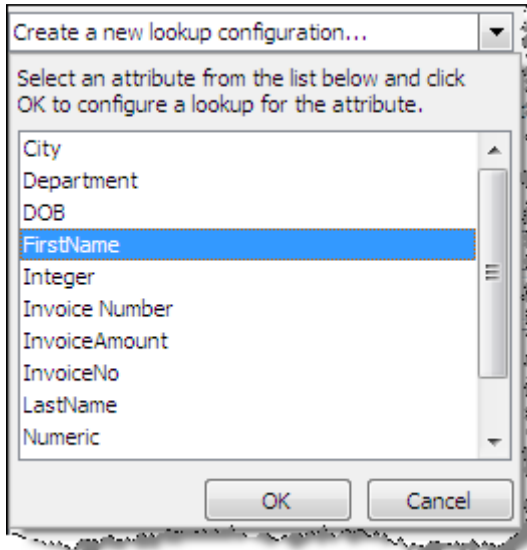
Query

Optional Field Mappings

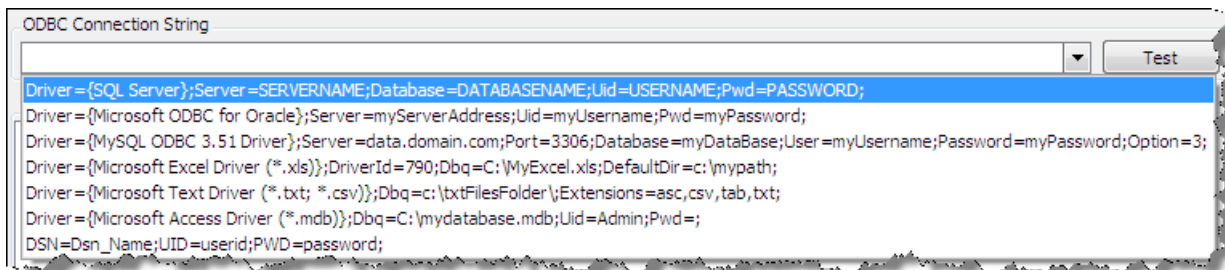
Source Field Name	Attribute
*	<input type="text"/>

Test Input

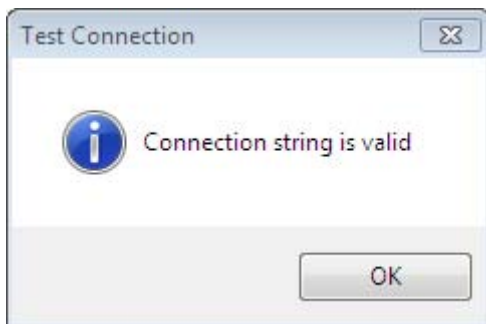
To create a new lookup, first select an ImageQuest Attribute to be used as the Keyfield. `FirstName` is selected in the example below. Click OK to continue and to configure the lookup.



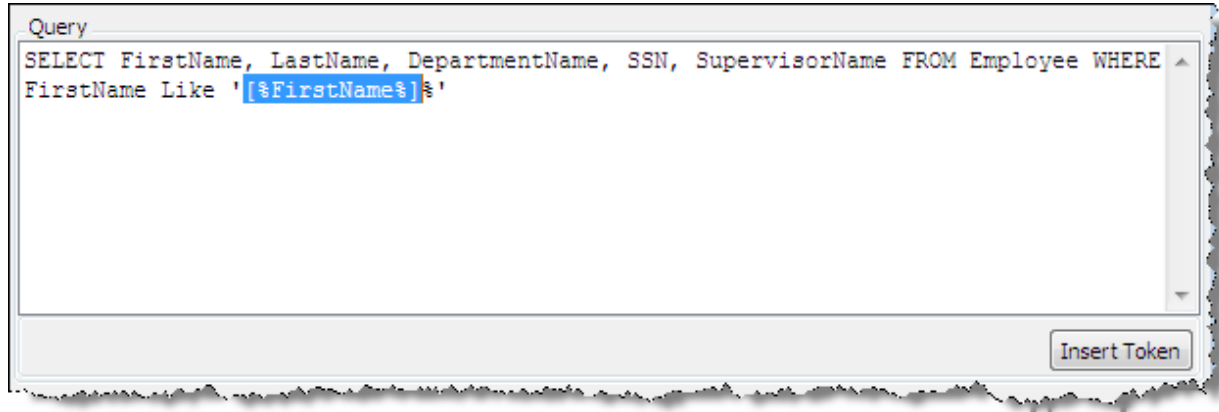
Next, select an ODBC Connection String for the data source from the drop-down. The list provides some commonly used ODBC string templates that may be used. If you do not see an ODBC Connection string for your type of database, one can manually be typed in.



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



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

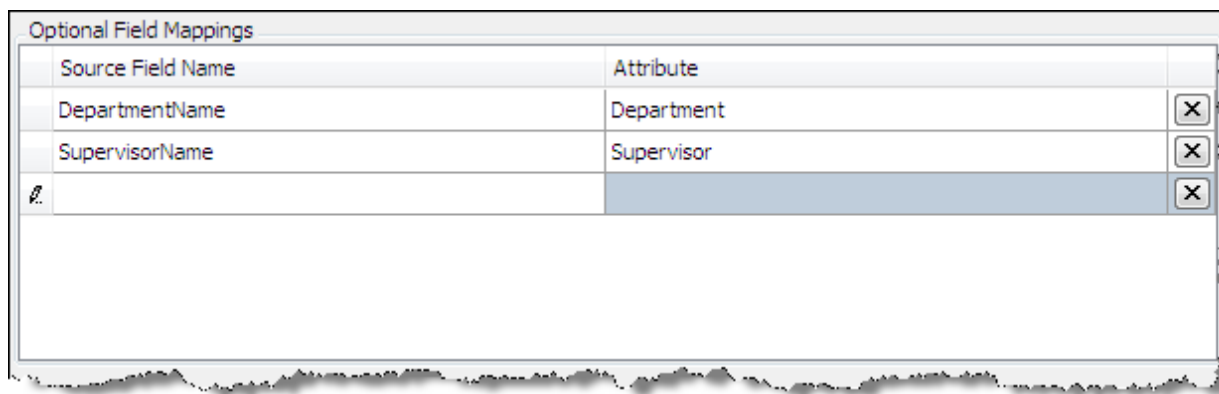


Query

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

Insert Token

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



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

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

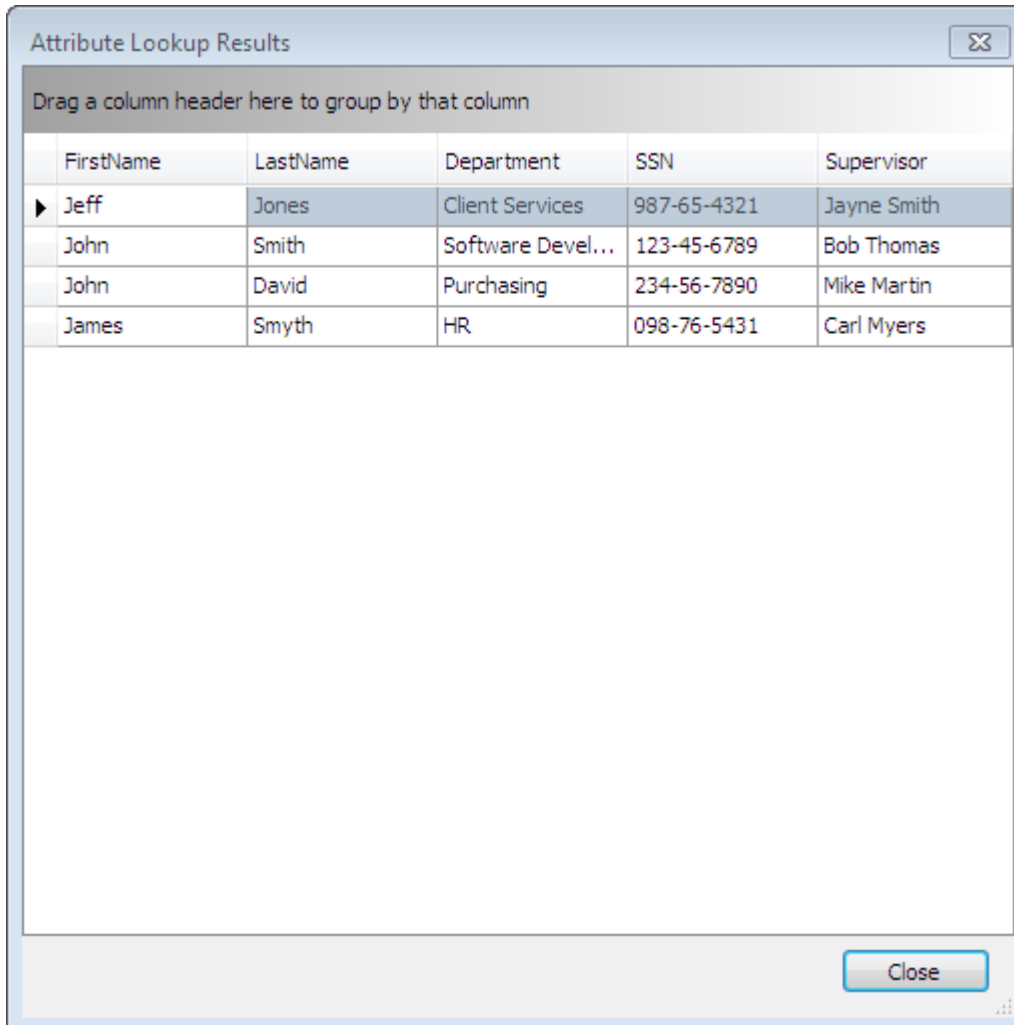


Test Input

j

Test

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


A screenshot of a software window titled "Attribute Lookup Results". The window has a close button (X) in the top right corner. Below the title bar is a grey instruction bar that says "Drag a column header here to group by that column". Below this is a table with five columns: "FirstName", "LastName", "Department", "SSN", and "Supervisor". The table contains four rows of data, all starting with "J" in the first column. The first row is highlighted with a blue background. Below the table is a large empty white space. At the bottom right of the window is a "Close" button.

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



## Notification Rules

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

**Notification Rules**

 New Rule

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

 Details... Delete Rule

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

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

**Notification Rule Details**

**Rule Details**

Name:

Apply to attribute:

Days notice:

Recur every  days (0 for no recurrence)

Notify:

**Message**

**Specify additional criteria for notification using IQQL**

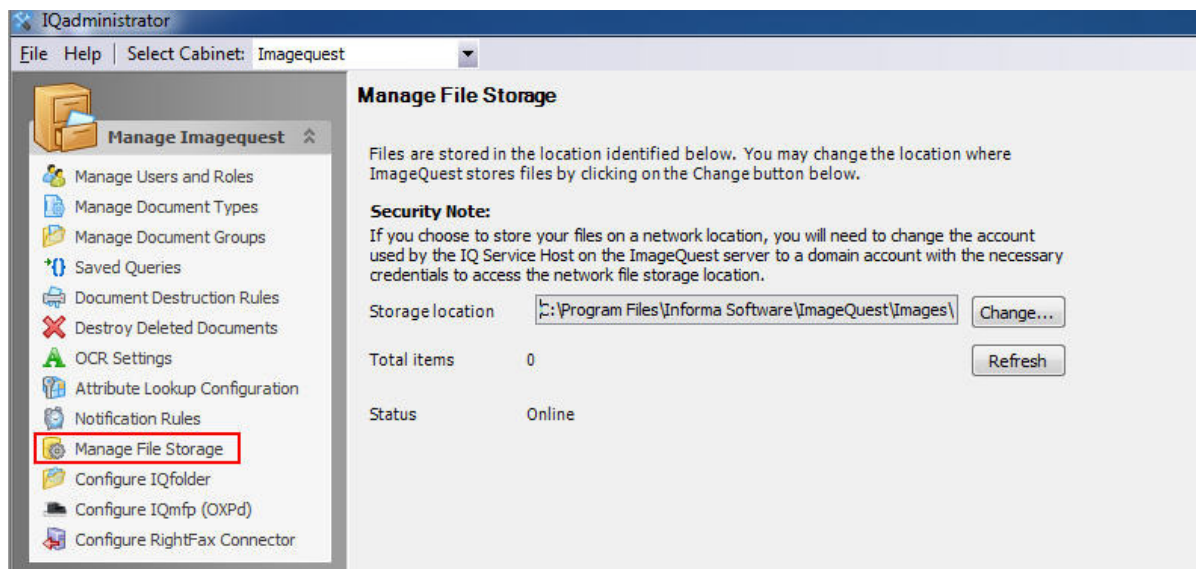
**Note:** Notification Rules will only be triggered when the attribute date is in the future. The notification rule engine processes documents every 60 minutes from the time the IQ application service is started.

## Manage File Storage

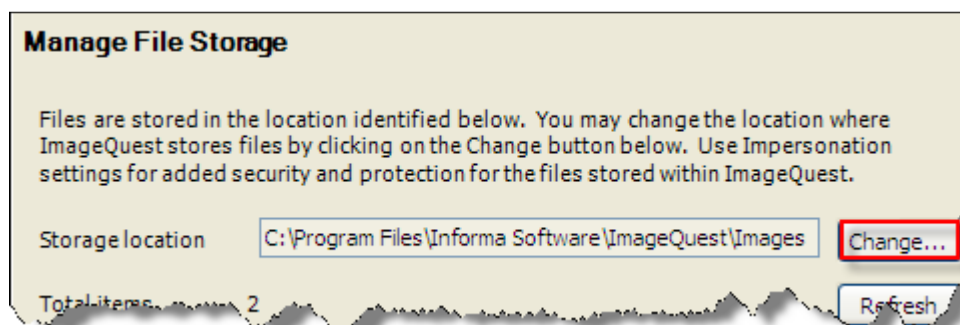
*IQadministrator* easily allows the Administrator to manage the storage and location of files. Click **Manage File Storage** to access the **Manage File Storage** screen as illustrated below.

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

For the Status to show as “Online” the Storage Location must be accessible from the ImageQuest server and the Service Account must have read\write access to the folder.

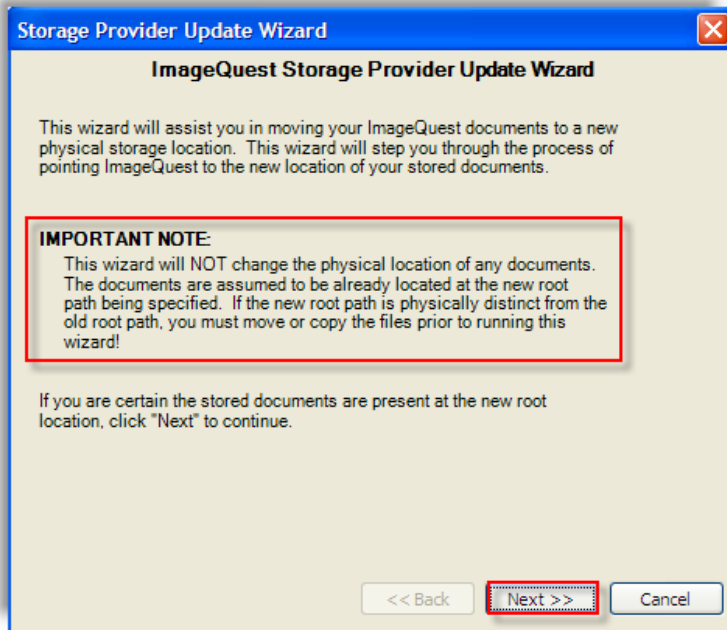


The “Storage location” field shows the current location where the files are stored. The “Total items” value shows the total number of files in the “Images” folder; the “Refresh” button allows the Administrator to update the “Total items” count. To change the “Storage location”, click the “Change” button as illustrated below.

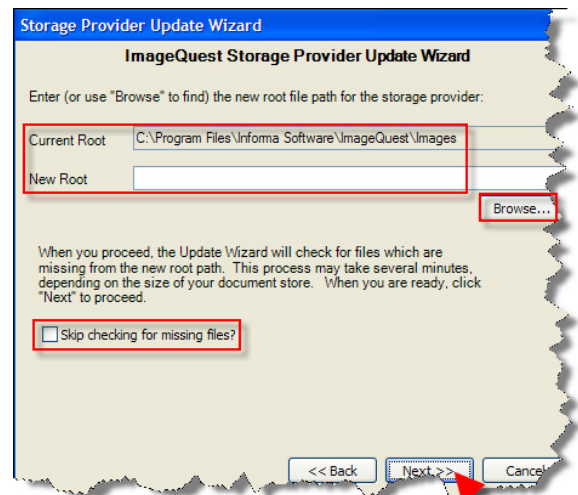


**Note:** The storage location is exclusive to ImageQuest, with its own folder structure, and should not be modified in any way.

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

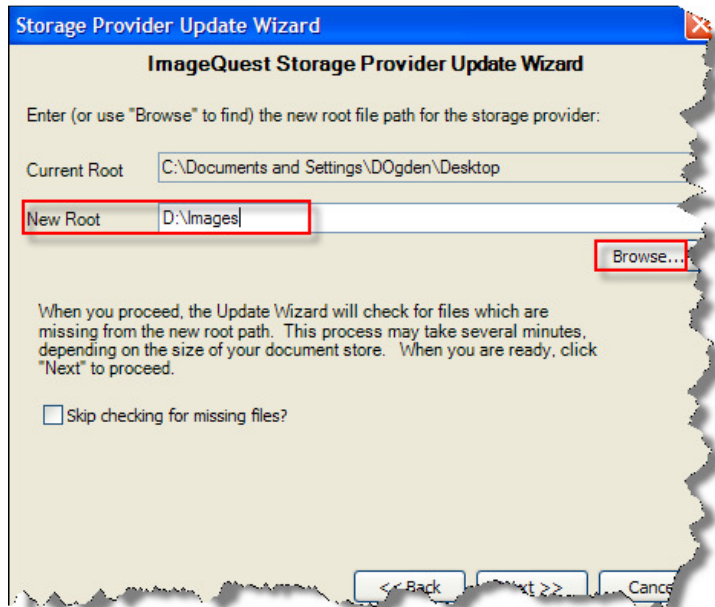


The “Current Root” field, highlighted below, shows the current location of the IQ files. To change the folder, either type in the new path or click “Browse” to choose a new root file path.

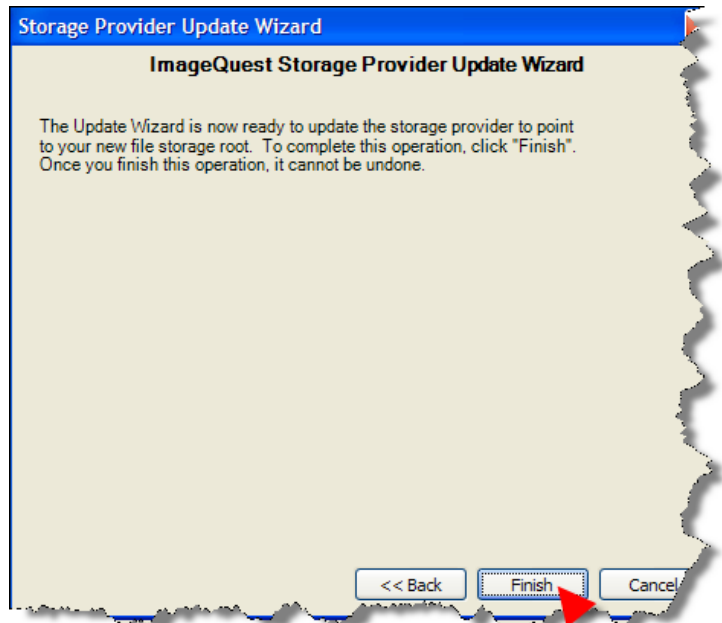




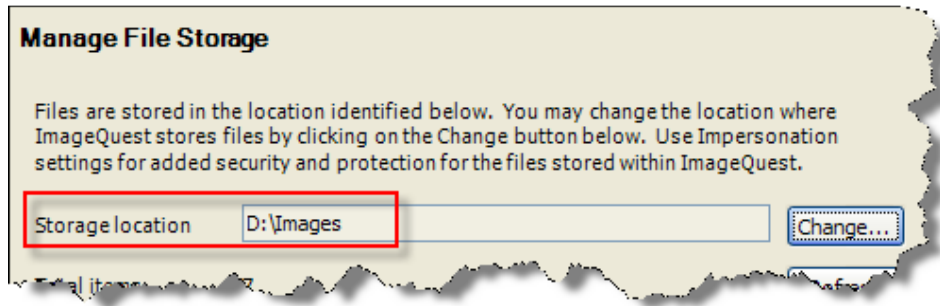
Enter the new root folder in the “New Root” field as displayed below. Click “Next” to proceed. As you proceed, the “Update Wizard” will check for files which are missing from the new root path if “Skip checking for missing files” remains unchecked; this process may take several minutes depending on the size of your document storage. To bypass this check, click the “Skip checking for missing files” box. Click “Next”.



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



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



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

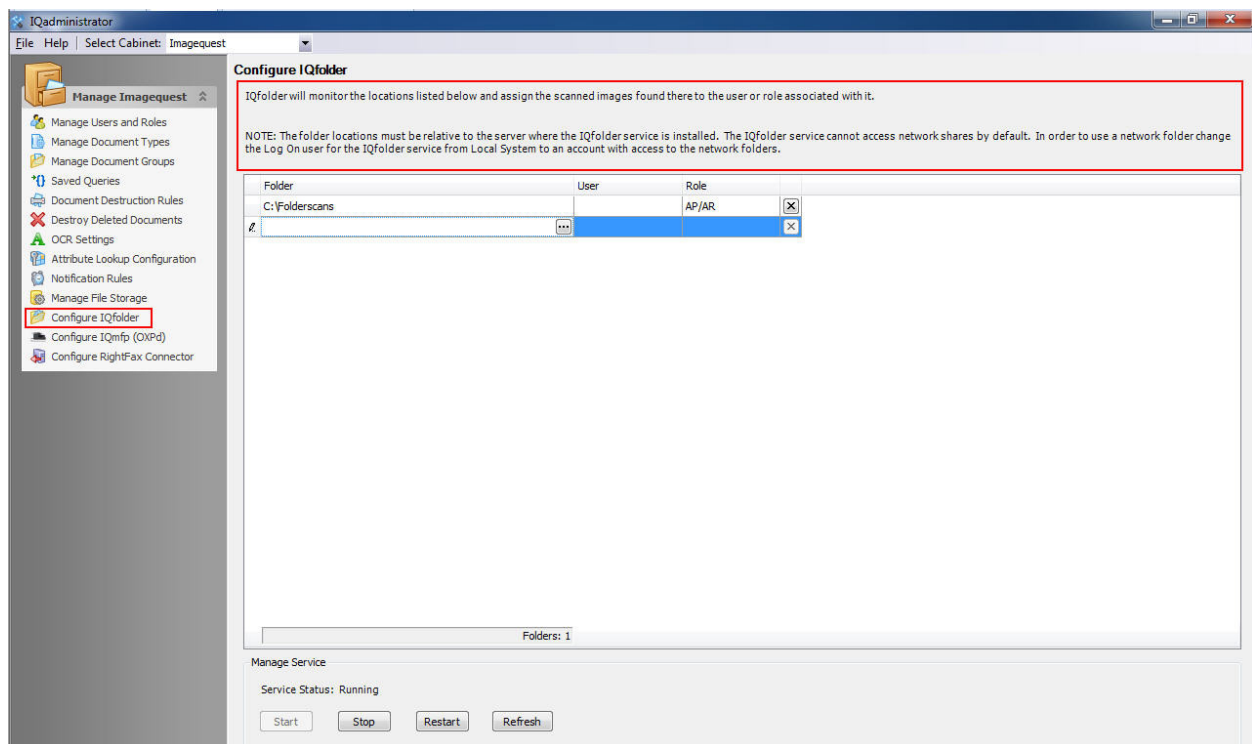
## Configure IQfolder


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

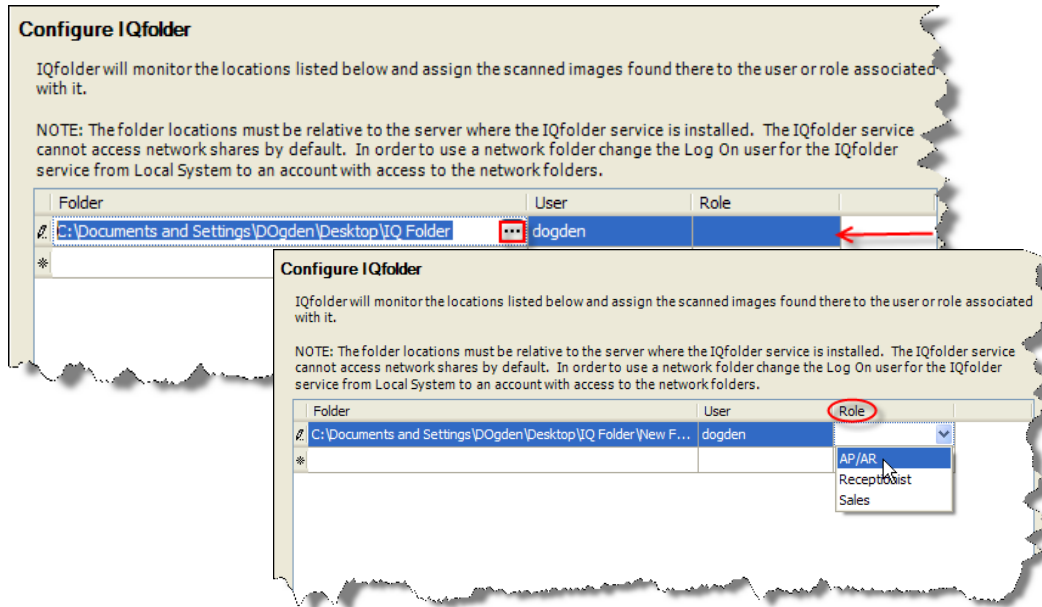
**Note:** .TIF files should be saved as multi-page .TIF files in order for the scan to show up as a single document in the Indexing Queue.

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

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



Then click the “Browse”  button to add a folder or to browse to an existing folder.



Click to choose the user from the drop-down menu in the user column. To save changes to a row, tab to the next row. The Administrator can also assign a role to a folder as demonstrated in **Figure 8.2**. This will cause the scanned files to appear in the “Indexing Queue” for every member of that role. Only one user can access and index the file at one time. Once a member of the role has indexed the file, it will no longer appear in the other member’s “Indexing Queue”.

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



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

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

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

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

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

**Note:** To delete a row with a saved folder location, highlight the row and press the keys Ctrl+D.

## Configure IQmfp (OXPd)

“Configure IQmfp (OXPd)”, which was introduced in IQ v10.3, is the method for adding and managing ImageQuest on supported HP MFP Devices. **ALL HP MFPs MUST BE UPGRADED to OXPd in order to work with ImageQuest version 10.3 or higher.**

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

## Confirm Device Model Number and Firmware Versions

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

### MINIMUM MEMORY & FIRMWARE VERSIONS SUPPORTED:

The devices covered in this release include the following models:

- LJ M3035mfp series: 256MB, 48.101.4
- CLJ CM3530mfp series: 512MB, 53.031.4
- LJ 4345mfp series: 256MB, 09.151.3
- LJ M4345mfp series: 256MB, 48.101.4
- LJ M4349mfp series: 256MB, 48.101.4
- CLJ 4730mfp series: 256MB, 46.231.3
- CLJ CM4730mfp series: 384MB, 50.081.3
- LJ M5035mfp series: 256MB, 48.101.4
- CLJ CM6030mfp series: 512MB, 52.051.3
- CLJ CM6040mfp series: 512MB, 52.051.3
- CLJ CM6049mfp series: 512MB, 52.051.3
- LJ 9040mfp series: 256MB, 08.141.3
- LJ 9050mfp series: 256MB, 08.141.3
- LJ M9040mfp series: 384MB, 51.051.4
- LJ M9050mfp series: 384MB, 51.051.4
- LJ M9059mfp series: 384MB, 51.051.4
- DS 9200C: 256MB, 09.151.3
- DS 9250C: 256MB, 48.091.3
- CLJ 9500mfp series: 512MB, 08.141.3
- SJ 7000n: Natively Supported
- M4500 series: Natively Supported

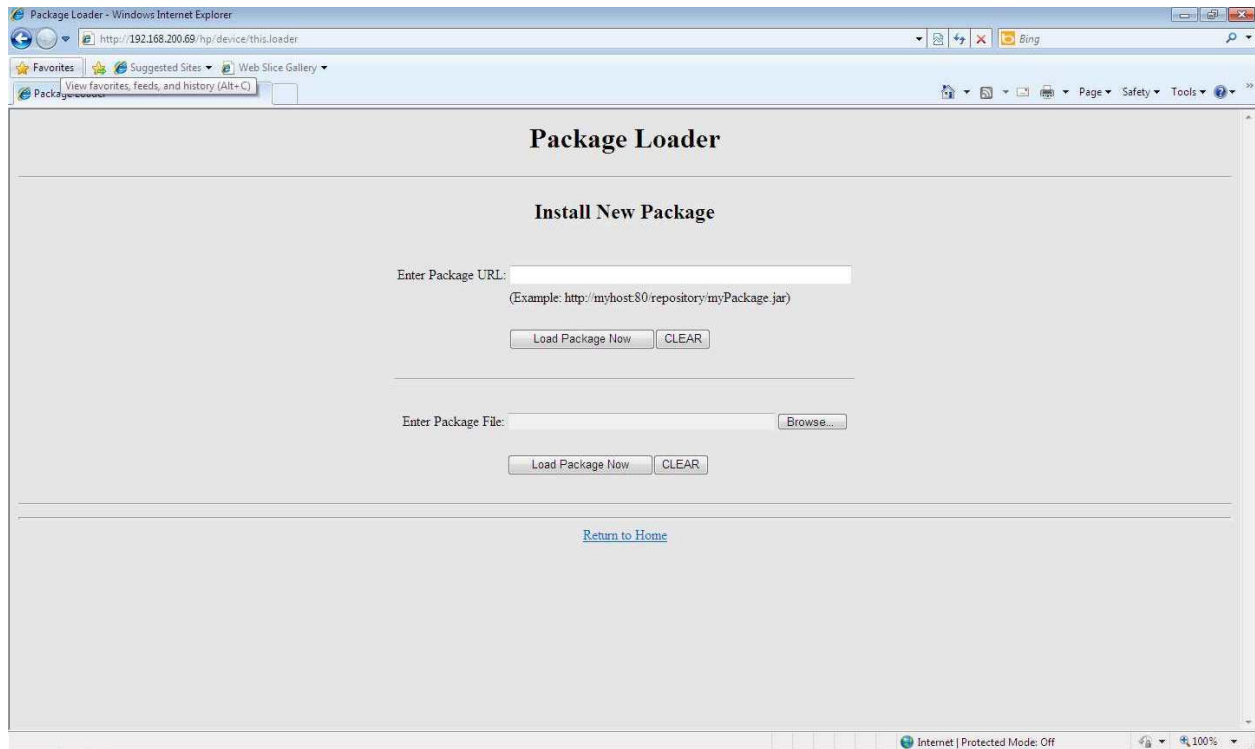
HP device firmware version can be retrieved from the device configuration page.

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

## Loading the OXPd Solutions Installer onto the device

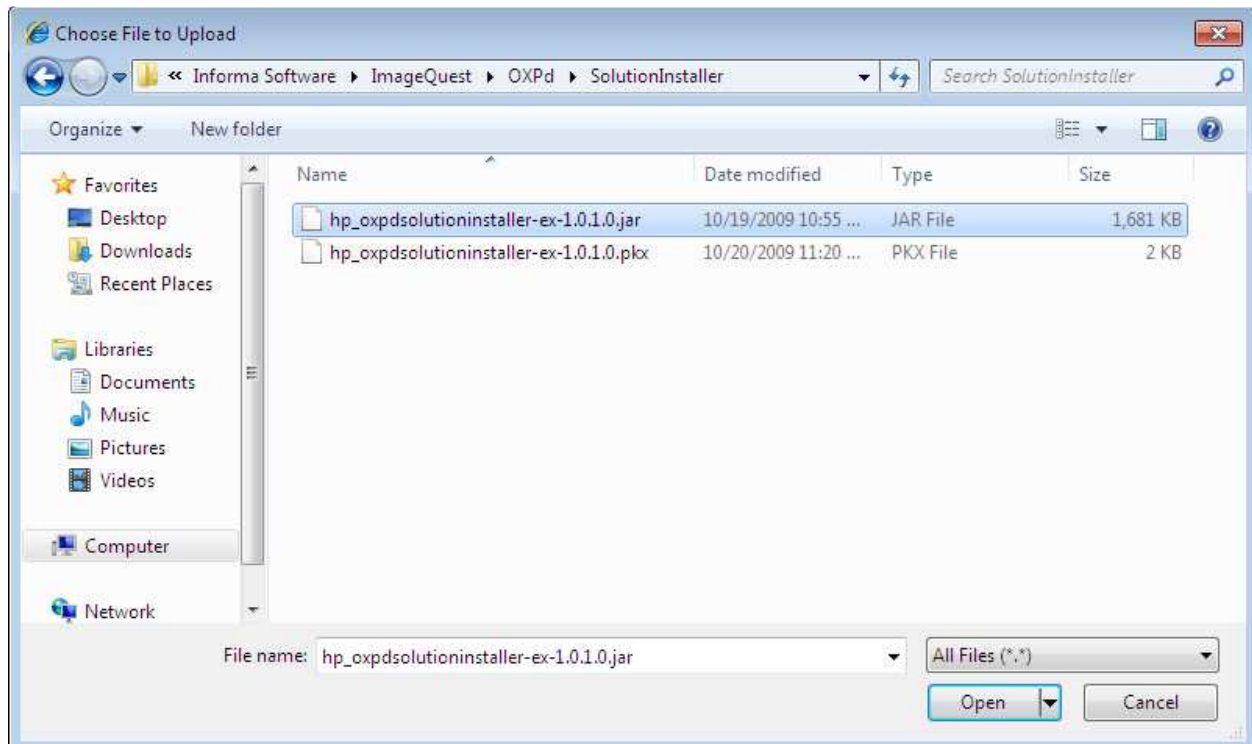
Browse to <http://<deviceIPaddress>/hp/device/this.loader> from the ImageQuest server to access the HP device Package Loader page. You will need to provide the device admin credentials to access the page.

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



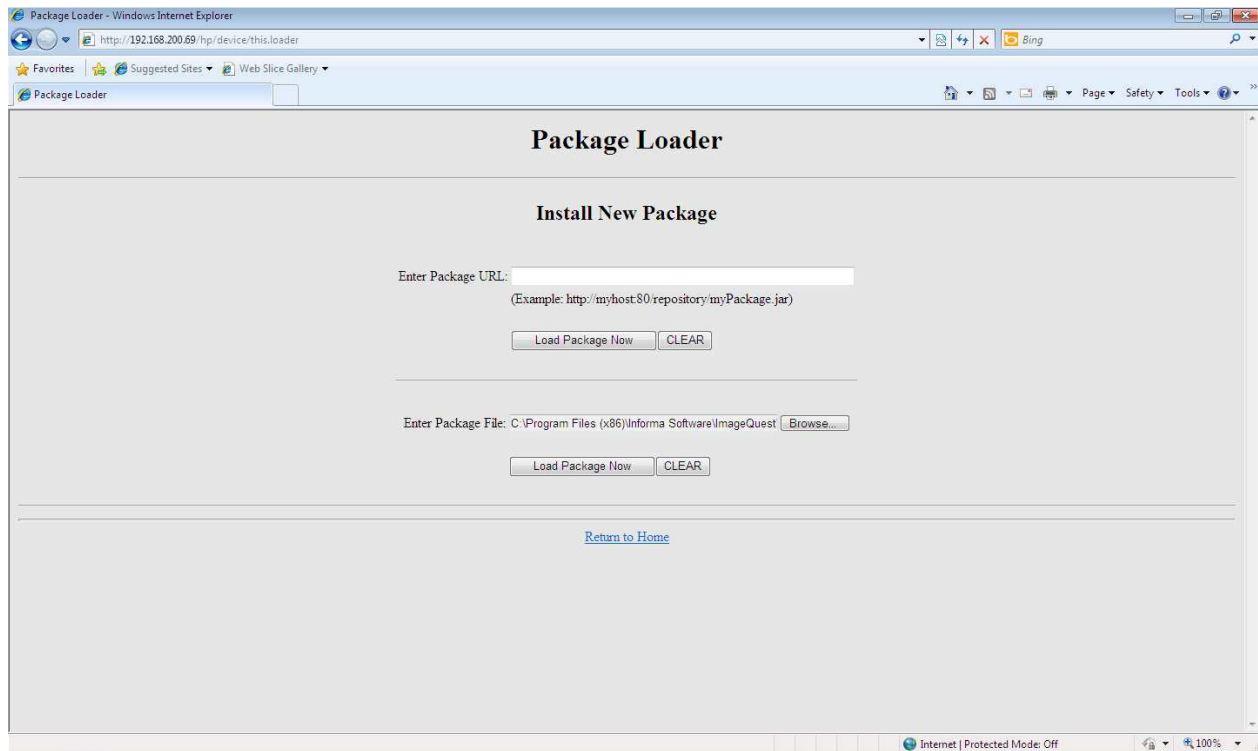
For example, if the ImageQuest Server was installed to C:\Program Files(x86)\Informa Software, the OXPd Solution Installer jar file would be located in C:\Program Files(x86)\Informa Software\ImageQuest\OXPd\SolutionInstaller.

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



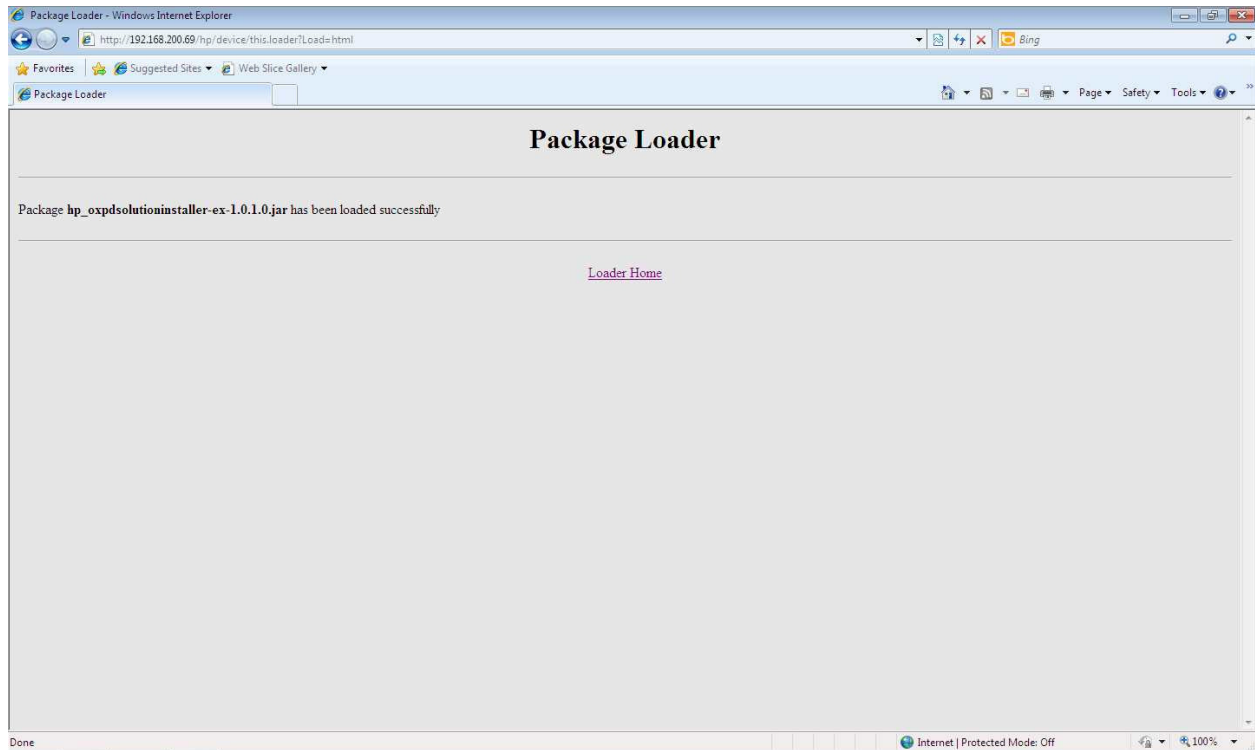


Click “Load Package Now” to load the jar file. It may take a few minutes to load.



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

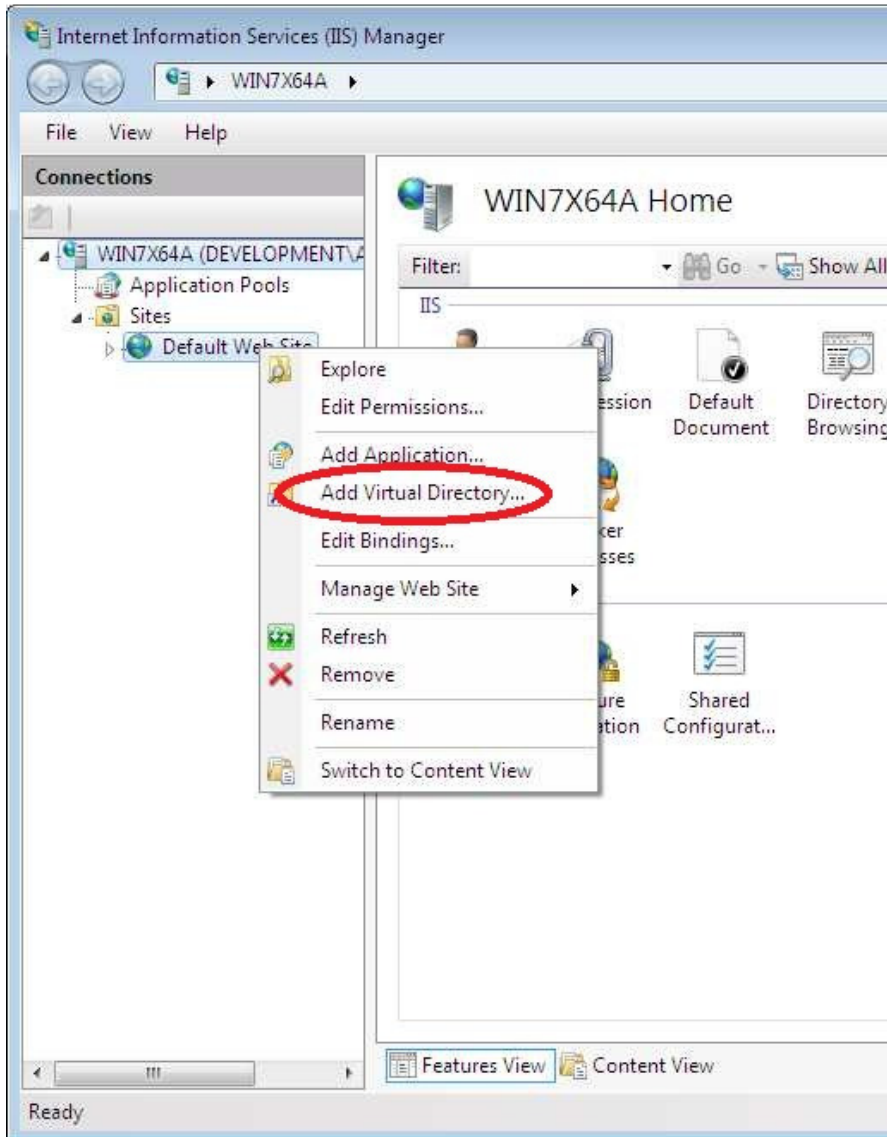
Close the device Package Loader page.



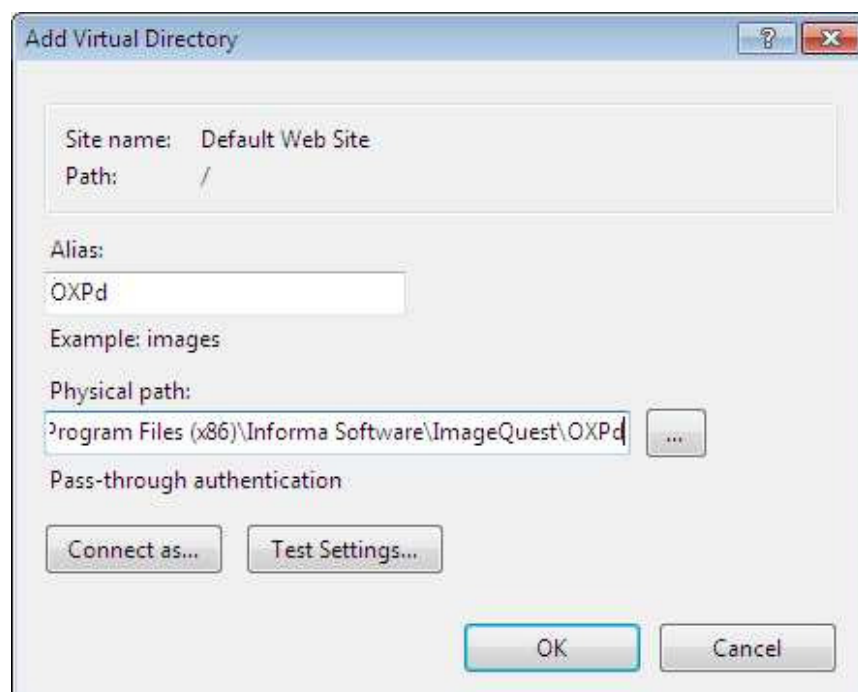
## Configure IIS for OXPd

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

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

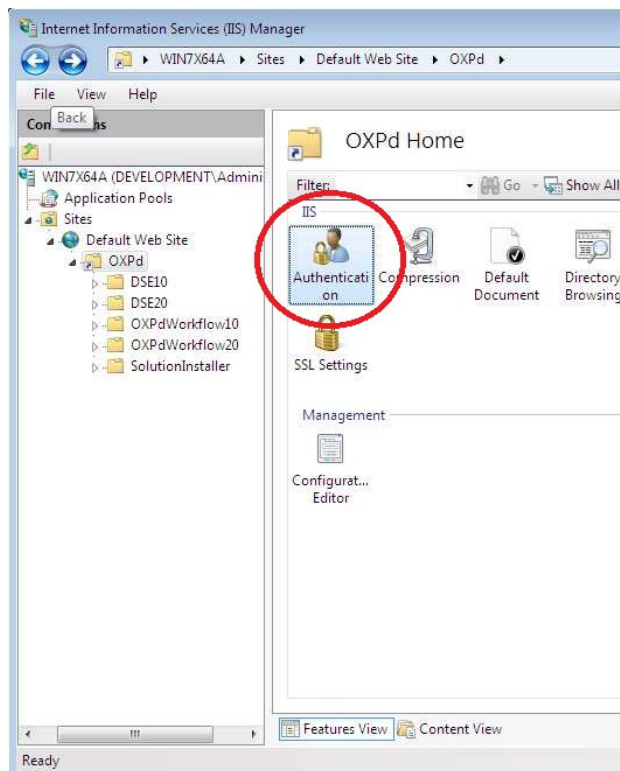


In the Add Virtual Directory dialog, type "OXPd" for the Alias and browse to and use the Informa Software\ImageQuest\OXPd directory on the ImageQuest Server for the Physical path.

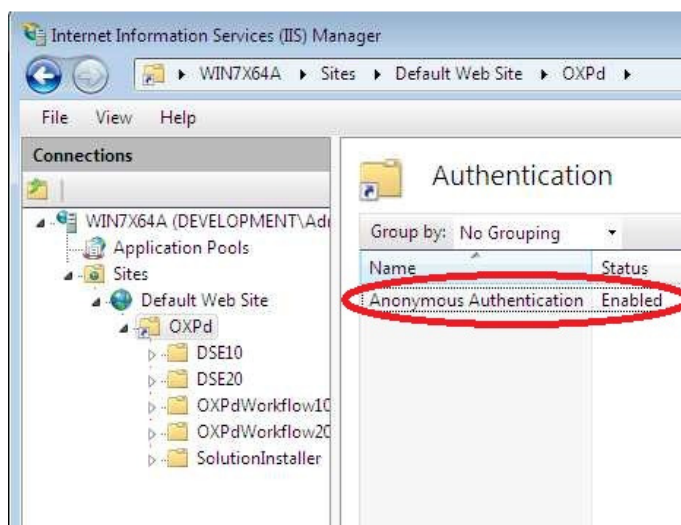


Click "OK" to close to save and add the new OXPd Virtual Directory.

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



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



## Install OXPd on the device

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

The screenshot shows the OXPd:SolutionInstaller web interface in a Windows Internet Explorer browser window. The address bar shows the URL `http://win7x64a/OXPd/oxpdsolutioninstaller.html`. The page title is "OXPd:SolutionInstaller".

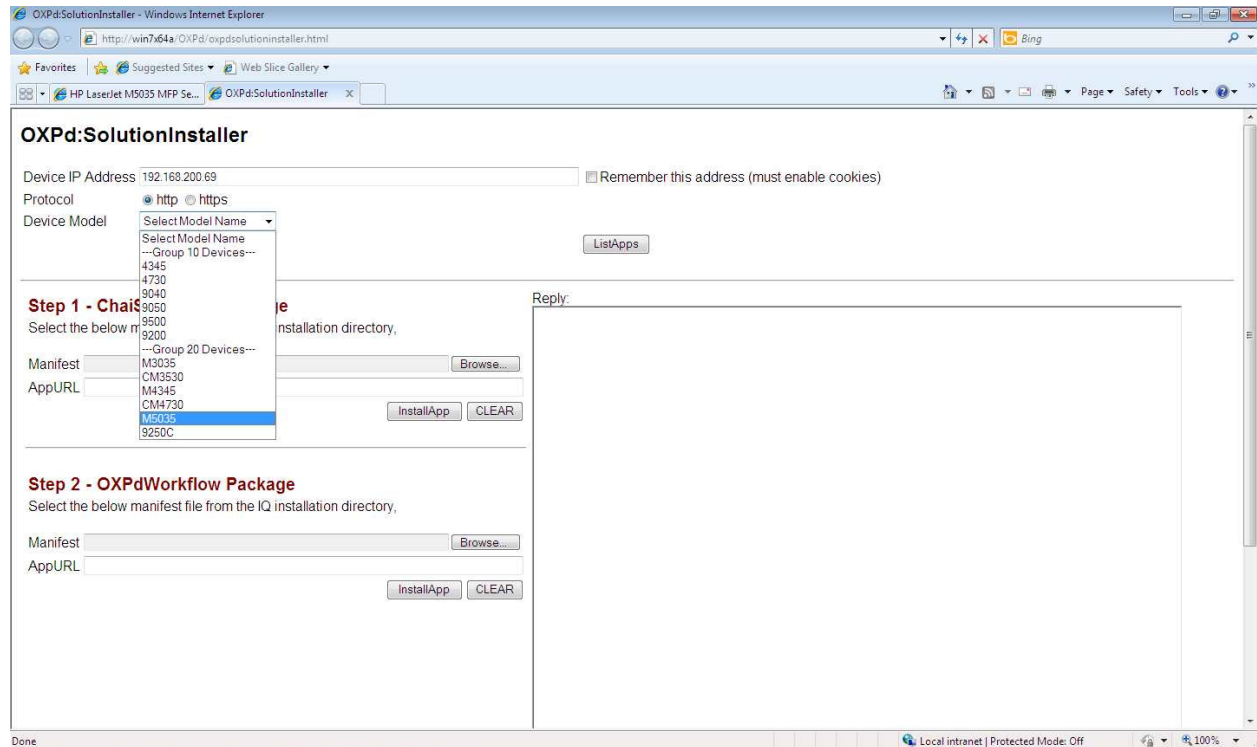
The interface includes the following elements:

- Device IP Address:** A text input field with a "Remember this address (must enable cookies)" checkbox.
- Protocol:** Radio buttons for "http" (selected) and "https".
- Device Model:** A dropdown menu labeled "Select Model Name" and a "GetVersionInfo" button.
- ListApps:** A button.
- Step 1 - ChaiSOE\_DSE Package:**
  - Text: "Select the below manifest file from the IQ installation directory."
  - Manifest:** A text input field with a "Browse..." button.
  - AppURL:** A text input field.
  - Buttons: "InstallApp" and "CLEAR".
- Step 2 - OXPdWorkflow Package:**
  - Text: "Select the below manifest file from the IQ installation directory."
  - Manifest:** A text input field with a "Browse..." button.
  - AppURL:** A text input field.
  - Buttons: "InstallApp" and "CLEAR".
- Reply:** A large text area for responses.

The status bar at the bottom indicates "Done" and "Local intranet | Protected Mode: Off".

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

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



## OXPd:SolutionInstaller

Device IP Address

Protocol ☒ http ☐ https

Device Model

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

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

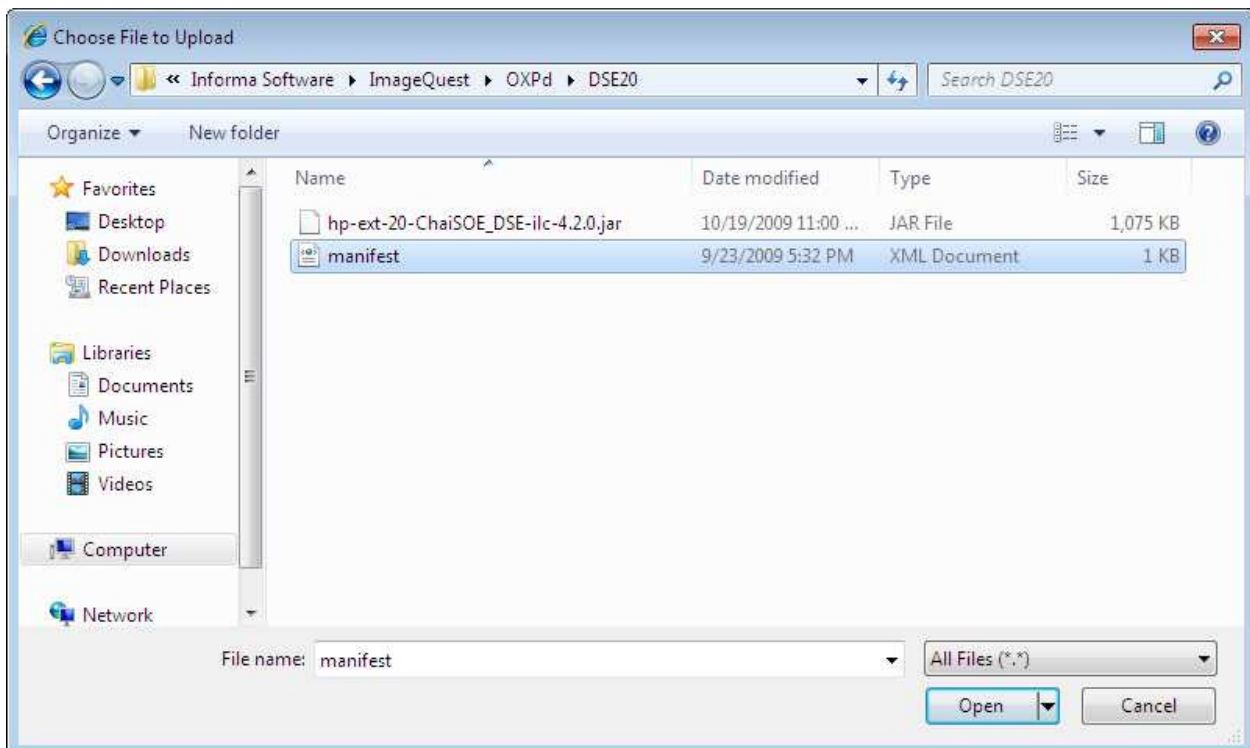
### Step 1 - ChaiSOE\_DSE Package

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

Manifest  Browse...

AppURL

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





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

**Step 1 - ChaiSOE\_DSE Package**

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

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

AppURL http://win7x64a/OXPd/DSE20/hp-ext-20-ChaiSOE\_DSE-ilc-4.2.0.jar

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

**Step 1 - ChaiSOE\_DSE Package**

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

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

AppURL http://win7x64a/OXPd/DSE20/hp-ext-20-ChaiSOE\_DSE-ilc-4.2.0.jar

**Step 2 - OXPdWorkflow Package**

Select the below manifest file from the IQ installation directory,  
 C:\Program Files\Informa Software\ImageQuest\OXPd\Workflow20\manifest.xml

Manifest

AppURL http://win7x64a/OXPd/Workflow20/hp-ext-20-oxpdworkflow-ilc.1.4.8.0.jar

Reply:

202 Accepted

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

Reply:

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

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

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

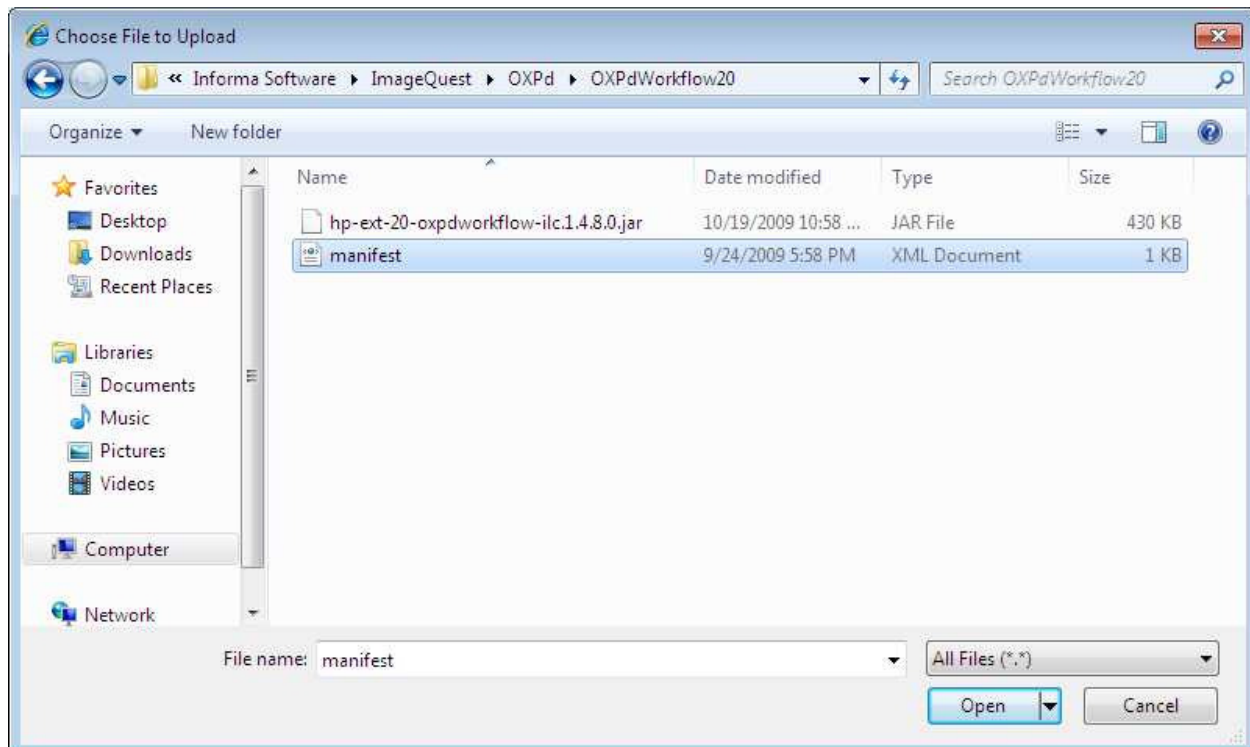
**Step 2 - OXPdWorkflow Package**

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

Manifest  **Browse...**

AppURL

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



Click “InstallApp” to install the OXPdWorkflow Package manifest.

**Step 2 - OXPdWorkflow Package**

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

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

AppURL

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

XPdSolutionInstaller - Windows Internet Explorer

http://win7x64a/XPd/oxpsolutioninstaller.html

Forward Suggested Sites Web Slice Gallery

XPdSolutionInstaller

**XPd:SolutionInstaller**

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

Protocol ☒ http ☐ https

Device Model

**Step 1 - ChaiSOE\_DSE Package**

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

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

AppURL

**Step 2 - OXPdWorkflow Package**

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

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

AppURL

Reply

202 Accepted

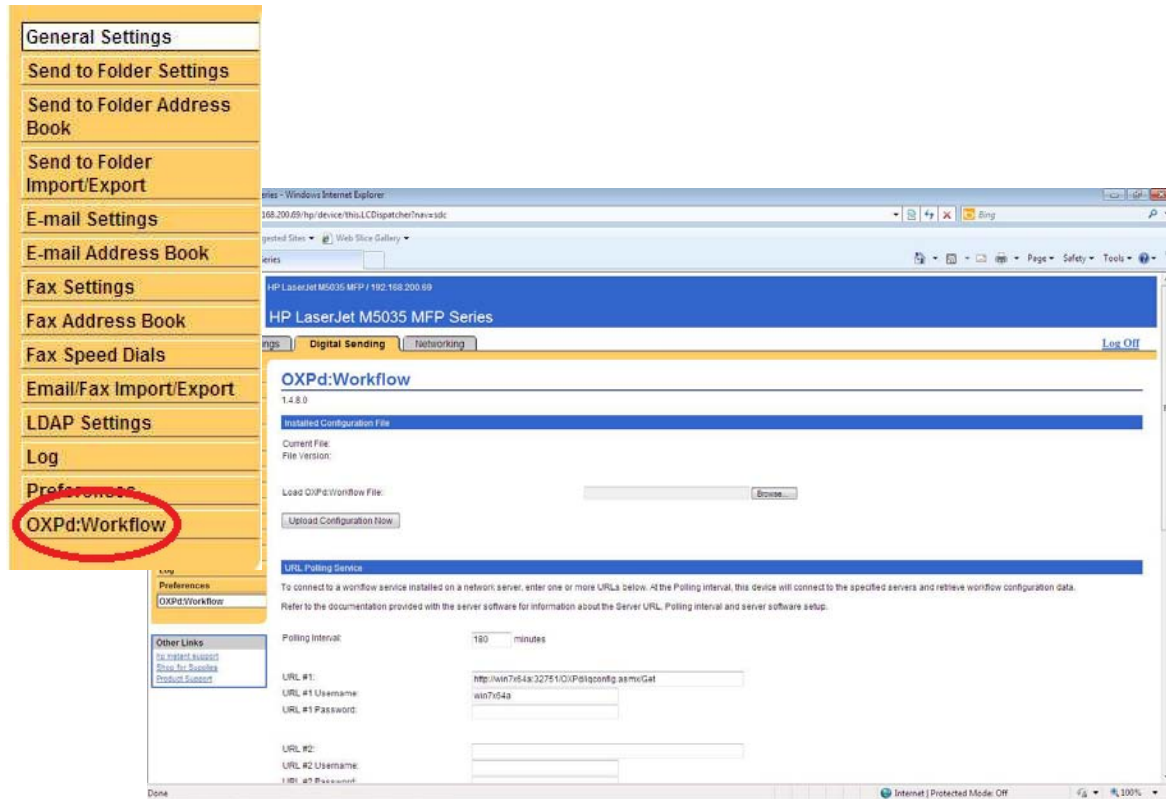
Done Local intranet | Protected Mode: Off 100%



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

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

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



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

**Configure IQmfp (OXPd)**

Select Device:

Display Name:

Hostname/Address:  ☐ Use SSL

Model Name:

Serial Number:

IQ Server:

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

Device Users

☒ All Users

Users in Role:

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

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

**Configure IQmfp (OXPD)**

Select Device: M5035

New Remove Save

Display Name: M5035

Hostname/Address: 192.168.200.69 ☐ Use SSL

Model Name:

Serial Number:

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

Page Orientation: ☒ Portrait ☐ Landscape

Color: ☒ B & W ☐ Color

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

Number of Sides: ☒ Single ☐ Double

Device Users

☒ All Users



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

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

**Configure IQmfp (OXPD)**

Select Device:

Display Name:

Hostname/Address:  ☐ Use SSL

Model Name: HP LaserJet M5035 MFP

Serial Number: CNBXB02422

IQ Server:

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

Device Users

☒ All Users

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

**Configure IQmfp (OXPD)**

Select Device:

Display Name:

Hostname/Address:  ☐ Use SSL

Model Name: HP LaserJet M5035 MFP

Serial Number: CNBXB02422

IQ Server:

**Page Orientation**

☒ Portrait  
☐ Landscape

**Color**

☒ B & W  
☐ Color

**Page Size**

☒ Letter  
☐ Legal  
☐ A4  
☐ Exec  
☐ Ledger

**Number of Sides**

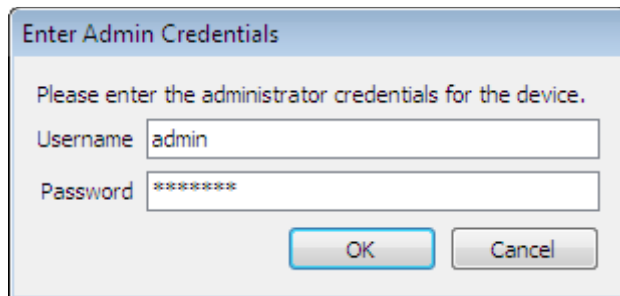
☒ Single  
☐ Double

**Device Users**

☐ All Users

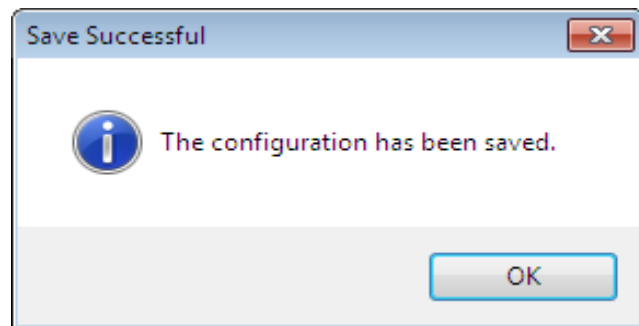
Accounting  
HR  
**MFP Users**  
MIS

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



A dialog box titled "Enter Admin Credentials" with a blue header bar. The main area is white and contains the text "Please enter the administrator credentials for the device." Below this text are two input fields: "Username" with the value "admin" and "Password" with masked characters "\*\*\*\*\*". At the bottom right are two buttons: "OK" and "Cancel".

The following message confirms the device was added successfully.



# Advanced Configuration

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

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

## Microsoft Windows Services

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

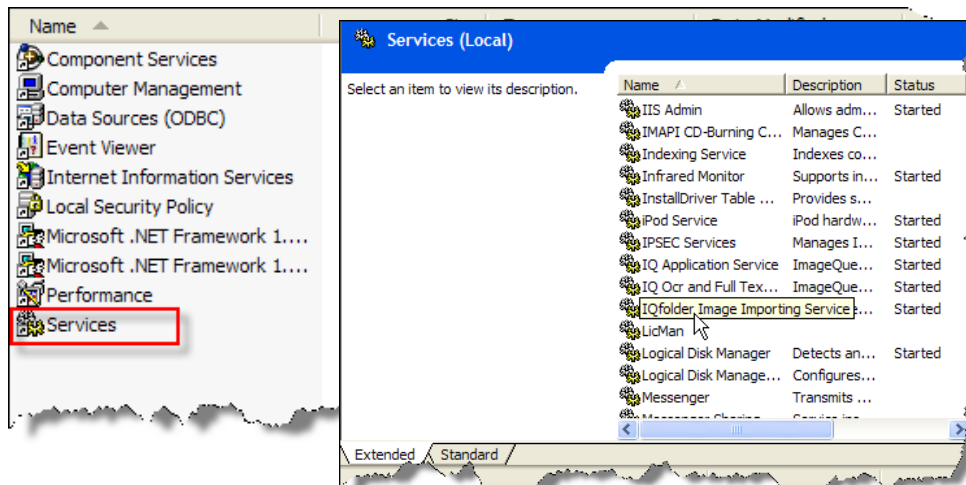
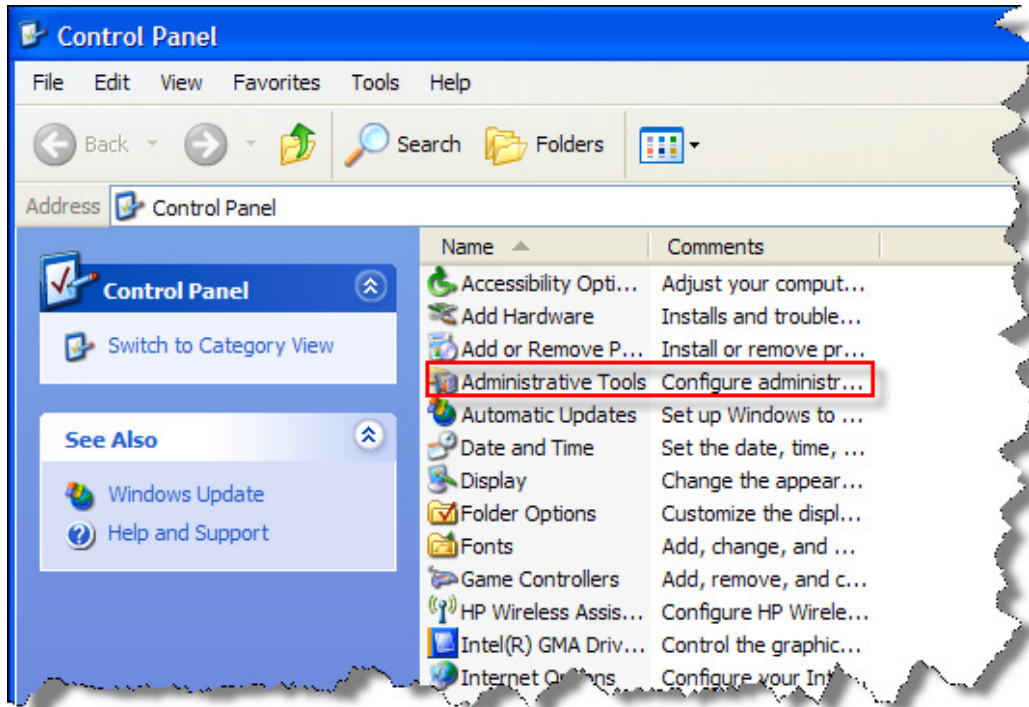
- “IQ Application Service”
- “IQ OCR and Full Text Service”
- “IQfolder Image Importing Service”

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

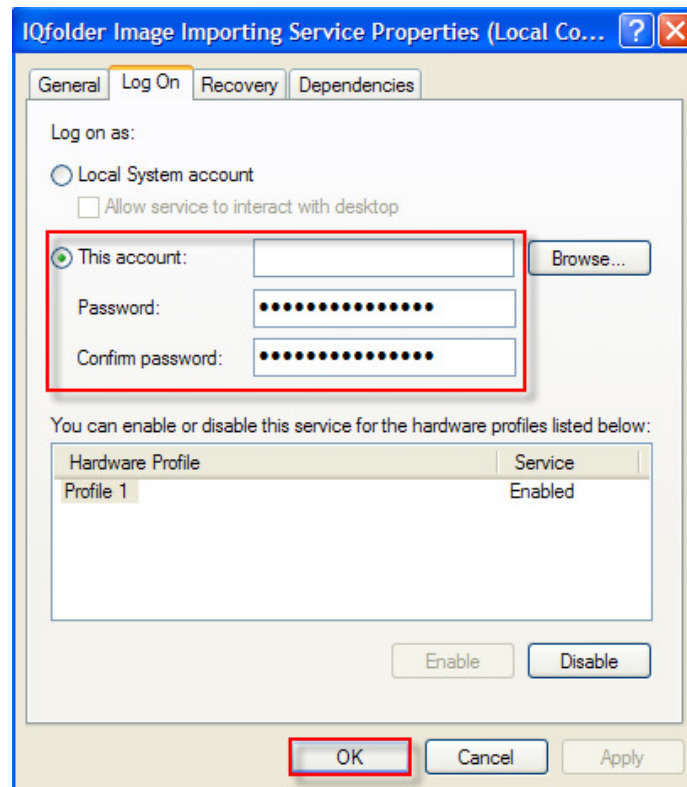
The “IQ OCR and Full Text Service” is responsible for performing “IQ Smart Indexing” OCR on .TIF files in the Indexing Queue to allow quick “click and drag” indexing in the document Indexer. It is also responsible for extracting text from indexed documents and storing it in the database for keyword searching.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

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

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



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

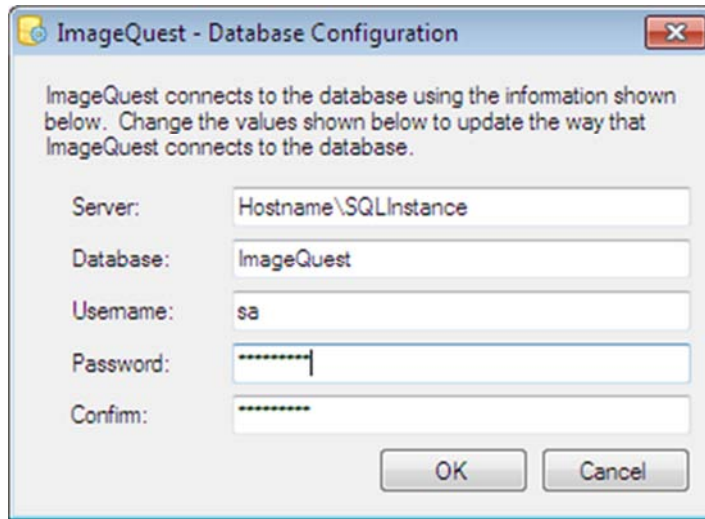


Restart the IQfolder service in order for the changes to take effect.

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

## Database Configuration Utility

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



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

## Report View

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

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

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

## WebIQ

WebIQ can be setup after the ImageQuest server installation and it requires Internet Information Services (IIS) be installed on the ImageQuest server for configuration.

### Configure WebIQ in IIS on Server 2003 or Windows XP

To configure WebIQ for IIS 6.0, please follow these steps:

- 1) Open Control Panel >Administrative Tools >Internet Information Services (IIS) Manager
- 2) Expand the server name tree
- 3) Expand Web Sites
- 4) Right click on Default Web Site and select New>Virtual Directory and click "Next"
- 5) Enter "WebIQ" for the Alias and click "Next"
- 6) Browse to the following path: C:\Program Files\Informa Software\ImageQuest\WebIQ and click "OK" and "Next"
- 7) Check "Read" and "Run scripts (such as ASP)" to allow the permissions and click "Next".
- 8) Click "Finish". WebIQ should now be listed under Default Web Site
- 9) Right click on WebIQ and choose "Properties"
- 10) Select the "Directory Security" tab
- 11) Click "Edit" in the Authentication and access control section
- 12) Uncheck "Anonymous Access" and check "Integrated Windows Authentication"
- 13) Click "OK" and "OK" again to close out of IIS
- 14) Restart IIS
- 15) If a firewall is enabled on the IQ server, make sure port 80 is open
- 16) Browse to <http://servername/webiq/default.aspx> and confirm the WebIQ homepage is accessible

**Note:** ASP.NET v4.0.30319 may need to be set to Allowed under Web Service Extensions.



## Configure WebIQ in IIS on Server 2008/2008 R2 or Windows Vista/7

Before configuring WebIQ in IIS 7, please confirm the following IIS features have been installed:

### Common HTTP Features

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

### Application Development

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

### Health and Diagnostics

- HTTP Logging
- Request Monitor

### Security

- Windows Authentication
- Request Filtering

### Performance

- Static Content Filtering

### Management Tools

- IIS Management Console
- IIS 6 Management Compatibility
- IIS 6 Metabase Compatibility
- IIS 6 WMI Compatibility
- IIS 6 Scripting Tools
- IIS 6 Management Console

To configure WebIQ for IIS 7.0, please follow these steps:

- 1) Open Control Panel>Administrative Tools>Internet Information Services (IIS) Manager
- 2) Expand the server name tree
- 3) Expand Sites
- 4) Right click on Default Web Site and select "Add Application"
- 5) In the Alias box, type "WebIQ"
- 6) Click "Select" to change the Application pool to "Classic .NET AppPool" and click "OK"
- 7) Click the elipses next to the "Physical path" box and browse to C:\Program Files\InformaSoftware\ImageQuest\WebIQ and click "OK". WebIQ should now be listed under Default Website
- 8) Select WebIQ
- 9) In the WebIQ Home section on the right, double click "Authentication"
- 10) Make sure that "Anonymous Authentication" is Disabled (if on a workgroup environment, leave this Enabled)
- 11) Enable "ASP.Net Impersonation", "Forms Authentication: and "Windows Authentication"
- 12) Restart IIS
- 13) If a firewall is enabled on the IQ server, make sure port 80 is open
- 14) Browse to <http://servername/webiq/default.aspx> and confirm the WebIQ homepage is accessible

**Note:** ASP.NET v4.0.30319 (32 bit) may need to be set to Allowed under ISAPI and CGI Restrictions.

### Additional configuration for WebIQ on a x64 bit Operating System

To enable WebIQ to work in a x64 environment, 32-bit mode must be enabled. To run the 32-bit version of ASP.Net 4.0, follow these steps:

1. Click Start, Run, type *CMD* and then click OK
2. Type the following command to enable the 32-bit mode:

```
cscript %SYSTEMDRIVE%\inetpub\adminscripts\adsutil.vbs SET
W3SVC/AppPools/Enable32bitAppOnWin64 1
```

**Note:** The value of *%SYSTEMDRIVE%* for the above command in most cases is C:.

3. Type the following command to install the version of ASP.NET 4.0 (32-bit) and to install the script maps at the IIS root and under:

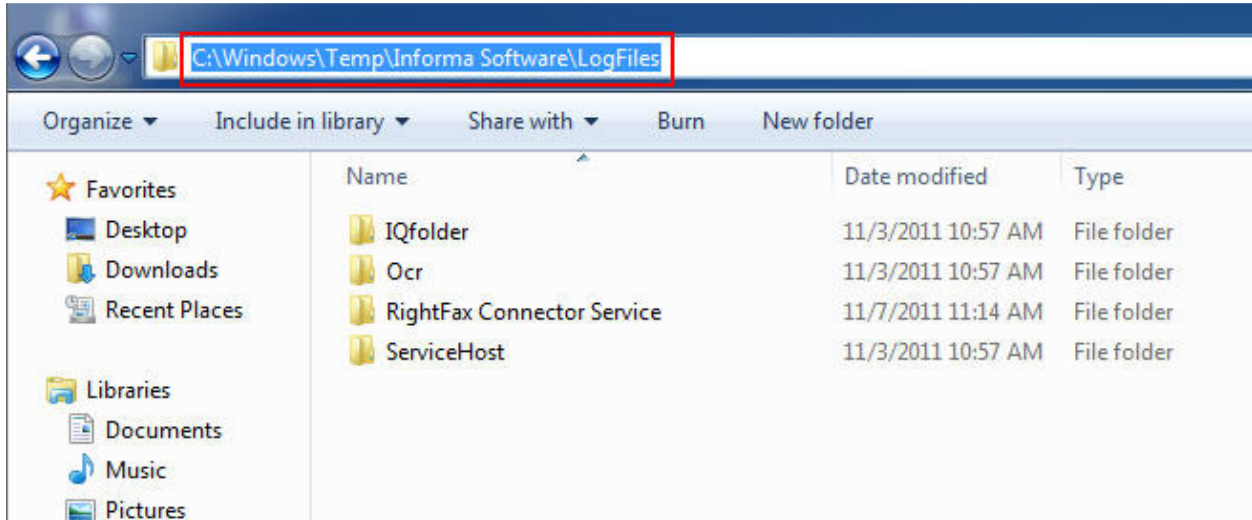
```
%SYSTEMROOT%\Microsoft.NET\Framework64\v4.0.30319/aspnet_regiis.exe -i
```

**Note:** The value of *%SYSTEMROOT%* is the location of the system folder, including the drive and path.

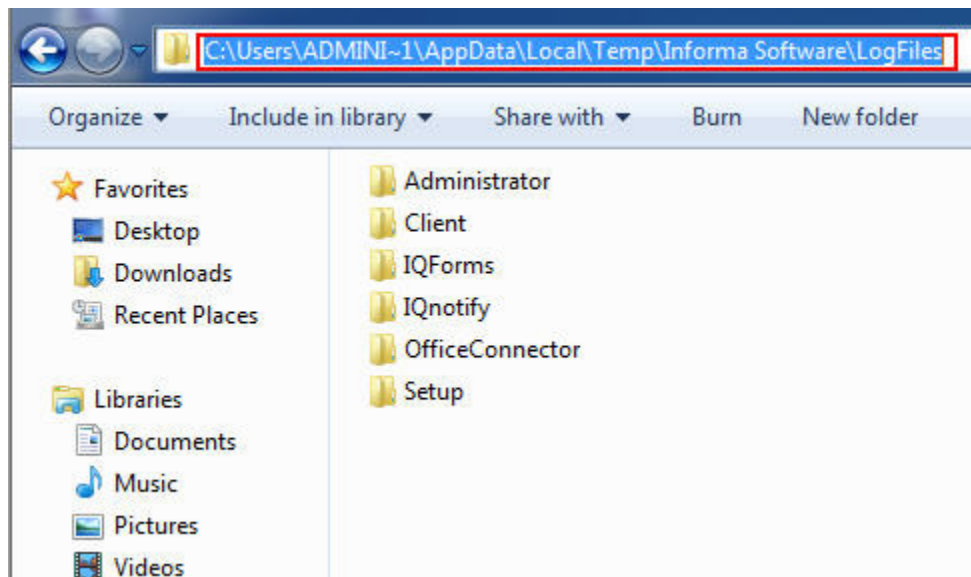
4. Make sure that the status of ASP.Net version 4.0.30319 (32-bit) is set to "Allowed" in the Web Service Extensions or ISAPI and CGI Restrictions in IIS Manager.

## Log Files

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



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



**Note:** The Local Settings folder is a protected operating system folder and is hidden by default.



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