



IMPLEMENTATION PLANNING GUIDE

Version 10.2




informa
software

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Introduction

Once the installation process for IQmfp is completed, we suggest taking some time to prepare an implementation plan for your IQmfp system.

After installation, the next steps for implementing IQmfp include:

- Adding and Managing Users and Roles
- Creating and Managing Document Types and Attributes
- Adding and Managing Document Groups
- Managing User and Document Permissions

The following guide will help define and illustrate the process of getting your IQmfp system working to solve your document archival needs.

For more information about configuring or using the IQmfp system, please refer the IQmfp Administrator and User guides.

Implementation Step 1: Who will be using the system?

1. Using **Worksheet 1** (see *Appendix*), compile a list of the employees or **Users** in your office by department. Determine which users will be handling which documents, etc.

informa software
A FBT Company

Worksheet 1 – Defining Users and Roles

Department Accounting

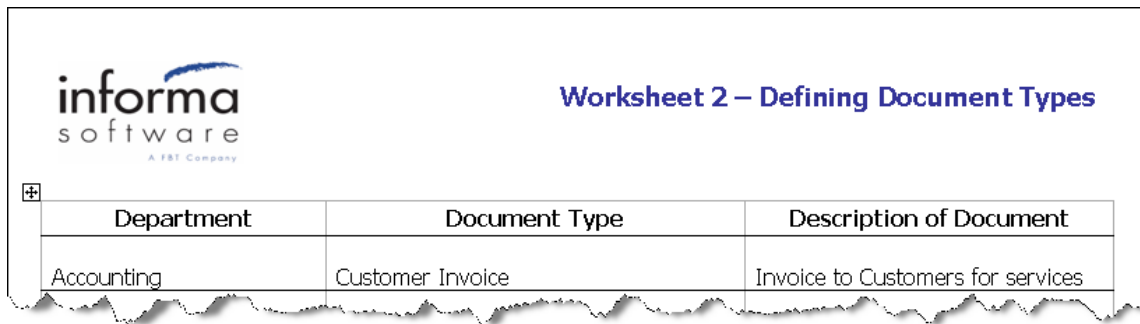
Employee/User Name	Domain Username	Document Group
Annie Smith - asmith	asmith	Orlando

2. Separating the users by departments or **Roles** can be helpful, because different 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 won't be looking for the Sales Brochures filed by the Sales Department. By creating an "Accounting" Role and a "Sales Department" Role, documents and permissions can be managed quickly in IQadministrator.
3. Also list the **Usernames** for the users in the office. This is the login that they use when they login to your network or **Domain**. This is the same username that they will use when the login to IQmfp.
4. Designate which **Document Group** a user may belong to, if necessary. Document Groups allow the Administrator to organize documents and further restrict access of a document to specific 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.

Note: Document Groups are not required in order to use the IQmfp system. Please see the IQmfp Administrator's Guide for more information about using and configuring Document Groups.

Implementation Step 2: What documents does your office use?

- Using **Worksheet 2** (see *Appendix*), compile a list of the documents your office uses. IQmfp has to know what a document is (**Document Type**), and how to search for it (using search criteria or **Attributes**). Any document your employees file and access on a regular basis should be a **Document Type** in IQmfp.




The image shows a worksheet titled "Worksheet 2 – Defining Document Types" from Informa Software, a FBT Company. It features a table with three columns: Department, Document Type, and Description of Document. The first row of data shows "Accounting" as the Department, "Customer Invoice" as the Document Type, and "Invoice to Customers for services" as the Description of Document. The worksheet has a torn bottom edge.

Department	Document Type	Description of Document
Accounting	Customer Invoice	Invoice to Customers for services

Implementation Step 3: Who uses the document?

6. Next, using **Worksheet 3** (see *Appendix*), determine who should ultimately be in charge of managing this document. Establish who will have access to each document type and how each user can access it by asking the following questions:
- Who can view/search for this document?
 - Who cannot view/search for this document?
 - Who should manage this document (attributes/permissions, etc.)?
 - Who can edit or revise this document?
 - Who will index/file this document?
 - Who can delete this document?



Worksheet 3 – Defining Document Type Permissions for Users/Roles

Document Type:	
Who can view/search for this document?	
Who cannot view/search for this document?	
Who should manage this document?	
Who can edit or make changes to this document?	
Who will index/file this document?	
Who can delete this document?	

Note: Permission to view/search a document type is set at the Document Type level. Permission to manage, edit, index and delete documents is set at the User or Role level. See the IQmfp Administrator's Guide for more information.

Implementation Step 4: How will you search for the document?

7. Next, establish what search criteria can be used for each document. These are the **Attributes** of the document. When looking at a document, determine what information on the document makes it unique, and how that document could be filed for future reference. For example, an Invoice could be filed under the date of the invoice, the invoice number, the customer name, etc. These are all unique identifiers for an invoice, or its attributes.

Examples of attributes include: **Names** (Company Names, Customer Names, Vendors, a list of Sales People, etc.), **Dates** (Received, Sent, Processed, Birthdates, etc.), **Unique ID Numbers** (Invoice Numbers, Purchase Order Numbers, Social Security Numbers, etc.), **Address Information**, **Totals**, **True/False** statements (whether the document has been Approved, Processed, Sent, etc.) and many more.

8. Using **Worksheet 4** (*see Appendix*), list all applicable Attributes for each document. Also, determine what type of attribute it is, or its **Data Type**. The following is a list of the Attribute Data Types available in IQmfp:


- **Date & Time** – requires the entry of a valid date (12/22/1961)
- **Integer** – requires numeric entry with no decimal (84) and no leading zeros (02344)
- **List** – creates a drop down list of choices, any key board character can be entered
- **Numeric** – requires numeric entry with a decimal (152.01) (no leading zeros)
- **Text** – any key board character can be entered (letters, numbers, special characters, etc.)
- **True/False** – will represent the field as a check box (box checked is True)

The List Data Type can be used to identify a list of consistent attribute values, etc. For example, if a document is called “Insurance”, a list attribute named “InsuranceType” could be created that provides the following list attribute values: Health, Life, Auto, Home, etc.

A List Data Type could also be named “SalesPerson” and could provide a drop-down list of names. This is beneficial to make sure that the value entered is consistent. If “SalesPerson” was the Text Data Type, the user could type “A. Smith” or “Alan Smith” or “Alan S.”, etc. It would be difficult to search for this Sales Person when the correct value is not known. The List Data Type can provide consistency for frequently entered values.

It may be helpful to make several copies of **Worksheet 4**, and use an entire worksheet section to define the attributes of your List Data Types.

9. Decide which of these attributes are **Required** when filing this document. The document cannot be filed or **indexed** without this information.

**Worksheet 4 – Defining Document Type Attributes and Data Types**

Document Type:	Invoice		
Attribute Name	Data Type	Required?	Notes
InvoiceNumber	Text	Yes	
Date	Date/Time		
CustomerName	Text or List	Yes	
CustomerZipCode	Integer		
PO_Number	Text		

Notice that Attributes names cannot contain spaces, nor any of the following special characters: : [] () < > { } ? = ! , / \

Implementation Step 5: How will you set up Permissions?

10. Determine the rights or Permissions that will be given to your users either on an individual basis, or through the Roles that will be created.

Determine the Administrators: Administrators are the users that have full rights to manage every aspect of the IQmfp system. They can determine and manage Users, Roles, Document Types, Attributes, etc. in IQadministrator and all other components of IQmfp.

Determine the Supervisors: Supervisors are the users that have permissions to manage certain components within IQmfp, such as the creation and management of Document Types, etc. They have more rights than typical users, but do not have the full rights of an administrator.

Users and Roles: The rest of the users in your system can be allowed or denied permissions on an individual basis, or will be assigned to a **Role**. Adding Roles is a way to save time in assigning permissions to document types as well as access to particular MFP devices. Rather than configuring dozens, hundreds or even thousands of individual user permissions, Administrators can assign Role permissions to specific forms and then assign users to that Role.

The following permissions can be assigned to users or roles in IQmfp:

- Add Document
- Delete Batch
- Delete Document
- Manage Document Type
- Update Document
- View Deleted Documents

For more information on these permissions, see the IQmfp Administrators Guide.

Using **Worksheet 5** (see *Appendix*), list what permissions will be assigned to Administrators and/or Supervisors. You can also list on the worksheet which permissions will be assigned to Roles and/or individual Users.



**Worksheet 5 – Determining Administrator,
Supervisor, and Role Permissions**

Administrators

- ☐ Add Document
- ☐ Delete Batch
- ☐ Delete Document
- ☐ Manage Document Type
- ☐ Update Document
- ☐ View Deleted Documents

Supervisors

- ☐ Add Document
- ☐ Delete Batch
- ☐ Delete Document
- ☐ Manage Document Type
- ☐ Update Document
- ☐ View Deleted Documents

Role/User

☐ _____
Add Document

Role/User

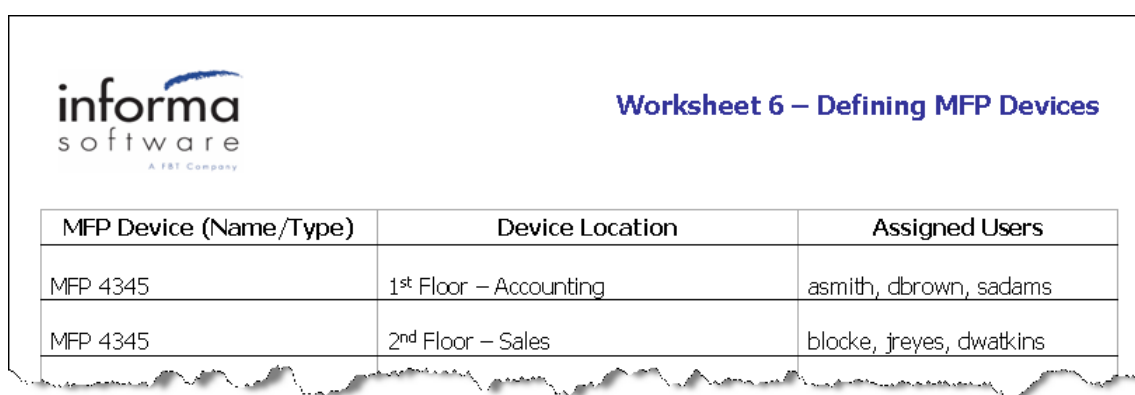
☐ _____
Add Document

Implementation Step 6: Managing your MFP Devices

11. If you have multiple HP MFP devices in your office environment, you may want to control access to specific MFP devices.

*If you do not wish to control which users have access to certain MFP devices, go ahead to the next section, **Configure IQmfp**.*

Roles can be created without document permissions for the purpose of controlling access to specific MFP devices in multiple MFP environments. Using **Worksheet 6** (see *Appendix*), list the MFP devices in your office environment, where they are located, and which users will be assigned to these devices.

The image shows a worksheet titled "Worksheet 6 – Defining MFP Devices" with the Informa Software logo in the top left. The logo includes the text "informa software" and "A F&T Company" below it. The worksheet contains a table with three columns: "MFP Device (Name/Type)", "Device Location", and "Assigned Users". There are two rows of data in the table.

MFP Device (Name/Type)	Device Location	Assigned Users
MFP 4345	1 st Floor – Accounting	asmith, dbrown, sadams
MFP 4345	2 nd Floor – Sales	blocke, jreyes, dwatkins

Note: If your system does not utilize HP MFP integration, IQfolder can be used for importing scans into IQmfp. Please see the IQmfp Administrator's Guide for information about using and configuring IQfolder.

Configure IQmfp

When you have completed the worksheets found in the Appendix of this guide, use the worksheets to begin configuring your IQmfp system.

For more information, please reference the ***IQmfp Administrator's Guide*** – Managing Users and Roles (pg 14), Managing Document Permissions (25), Manage Document Types (pg 27) and Configure HP MFP Device (pg 51).

1. Under *Manage Users and Roles*, use **Worksheet 1** as a guide to add **Users** to IQmfp.

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"/>	AP/AR
bjones	<input type="checkbox"/>	Sales
dgriffith	<input type="checkbox"/>	AP/AR, Sales
dogden	<input type="checkbox"/>	AP/AR, Sales
gwright	<input type="checkbox"/>	Sales
jsmith	<input type="checkbox"/>	Sales
twilliams	<input type="checkbox"/>	Sales

Buttons: Add, Remove, Properties

Each user listed on the worksheet will be added as a New User by entering their Username and Domain Name, if Single Sign-On is being used with Active Directory. If Active Directory will not be used, assign a password in the window below, uncheck the “Allow the user to authenticate with their Active Directory Credentials”, clear the Domain Name and add an email address, if desired.

Manage Users and Roles

☐ Add an existing user.

All users currently have access to the cabinet.

☒ Create a new user.

Username:

Password:

Confirm Password:

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

Domain Name:

Email Address:

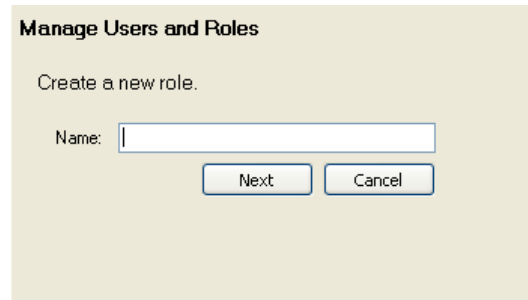
☐ Send email notifications to this user

Buttons: Next, Cancel

Click “Next” to continue.

2. Under *Manage Users and Roles*, use **Worksheet 1** and **Worksheet 6** as a guide to add New **Roles**.

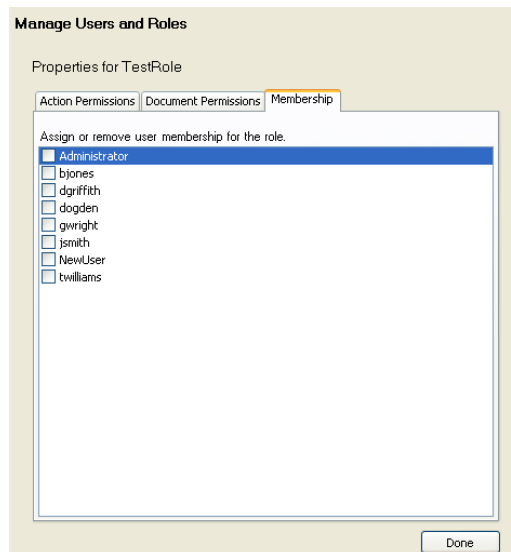
The names of the departments listed on **Worksheet 1** can be created as Roles. If you are working in a multiple MFP environment, use **Worksheet 6** to create Roles based on the MFP devices in your office. The name of the MFP, or its location can be used to name the Role.



The screenshot shows a dialog box titled "Manage Users and Roles". Inside, it says "Create a new role." Below this is a text input field labeled "Name:". To the right of the input field are two buttons: "Next" and "Cancel".

3. Under *Manage Users and Roles*, use **Worksheet 1** and **Worksheet 6** as guides to assigning Users to Roles.

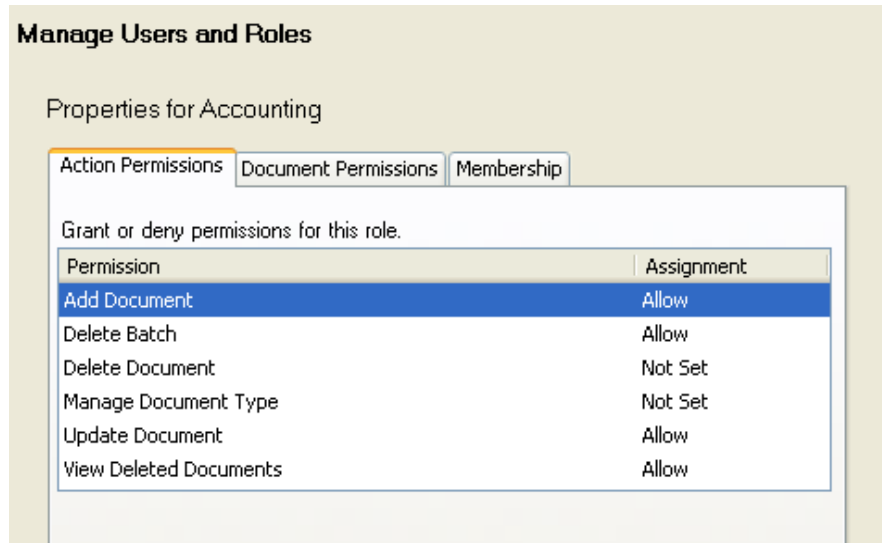
Employees in each department can be added as a user to their department's Role. Also, users that will have access to specific MFP devices can be assigned to the MFP device's Role.



The screenshot shows the "Manage Users and Roles" dialog box with the "Properties for TestRole" section. The "Membership" tab is selected. It contains a list of users with checkboxes next to them. The "Administrator" user is selected. The list includes: Administrator, bjones, dgriffith, dogden, gwright, jsmith, NewUser, and twilliams. A "Done" button is at the bottom right.

4. Under *Manage Users and Roles*, use **Worksheet 5** to allow or deny permissions to Roles and/or individual Users.

In the following example, the “Accounting” Role has permission to Add Documents, Delete Batches, Update Documents, and View Deleted Documents.



Manage Users and Roles

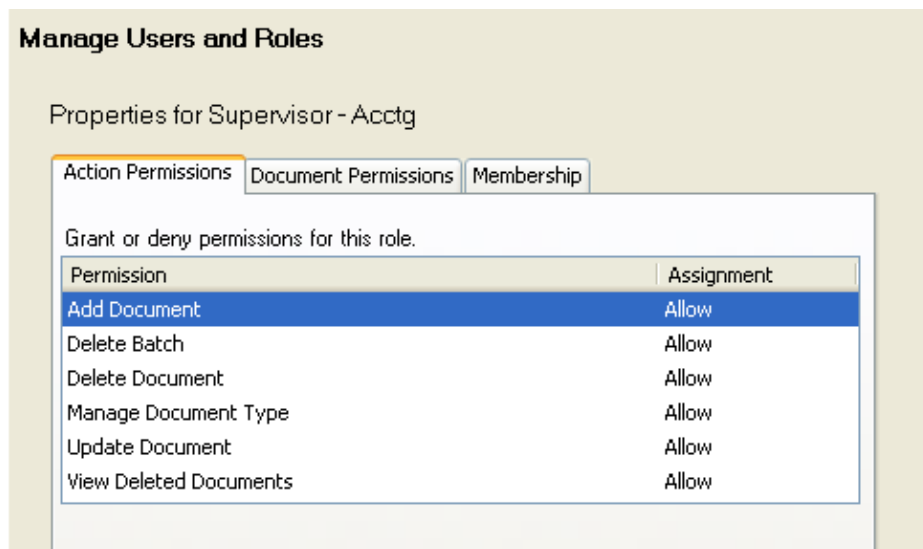
Properties for Accounting

Action Permissions Document Permissions Membership

Grant or deny permissions for this role.

Permission	Assignment
Add Document	Allow
Delete Batch	Allow
Delete Document	Not Set
Manage Document Type	Not Set
Update Document	Allow
View Deleted Documents	Allow

Alternatively, in the next example, The “Supervisor – Acctg” role has the same permissions as the “Accounting” Role, but can also Delete Documents, and Manage Document Types.



Manage Users and Roles

Properties for Supervisor - Acctg

Action Permissions Document Permissions Membership

Grant or deny permissions for this role.

Permission	Assignment
Add Document	Allow
Delete Batch	Allow
Delete Document	Allow
Manage Document Type	Allow
Update Document	Allow
View Deleted Documents	Allow

These permissions do not apply to Roles created for MFP device management.

- Under *Manage Document Types*, use **Worksheet 2** as a guide to create Document Types. Create a Document Type for each document listed.

Manage Document Types

Document Types | Attributes

Add... Edit...

- Appointments
- Invoice
- Main v2
- MFP Scan
- Patient Health Record
- PowerPoints

- Under *Manage Document Types*, use **Worksheet 4** as a guide to create and assign Attributes to document types.

Manage Document Types

Document Types | Attributes

Add New Attribute... Edit Attribute...

Name	DataType	Required	Default	Minimum	Maximum	Include in Filename
Appointment Date and Time	Date & Time	No				No
CheckDate	Text	No				No
ClientName	Text	No				No
Co	Text	No				No
CoDesc	Text	No				No
CustomerName	Text	No				No
Description	List	No				No
DueDate	Text	No				No
EmpNo	Text	No				No
Foreman	Text	No				No

Manage Document Types

Document Types | Attributes

Add... Edit...

☒ Allow users access to this document type by default.

Assign attribute to Main v2

Assign Add New Attribute...

Name	Data Type	Required	Default	Minimum	Maximum	Include in Filename
TANo	Text	No				No
CheckDate	Text	No				No
Foreman	Text	No				No
Sequence	Text	No				No
DueDate	Text	No				No
Co	Text	No				No
CoDesc	Text	No				No
EmpNo	Text	No				No
Name	Text	No				No

7. Under *Manage Users and Roles*, use **Worksheets 2, 3 and 5** as a guide to assign document permissions to Roles and/or allow or deny document permissions to individual users. Each Document Type created is listed in the Available Document Permissions column. If document permissions for a particular document are not assigned to a user or a role, it will not be possible to commit any batch that contains that document type and the document will not show up in IQmfp.

Manage Users and Roles

Properties for Accounting

Action Permissions | **Document Permissions** | Membership

Grant or deny access to document types for the role.

Document Type	Assignment
Appointments	Not Set
Invoice	Allow
Main v2	Allow
MFP Scan	Not Set
Patient Health Record	Not Set
PowerPoints	Allow

Done

Manage Users and Roles

Properties for jsmith

Action Permissions | **Document Permissions** | Membership

Grant or deny access to document types for the user.

Document Type	Assignment
Appointments	Not Set
Invoice	Not Set
Main v2	Not Set
MFP Scan	Not Set
Patient Health Record	Not Set
PowerPoints	Not Set

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

Document Type	Assignment
Appointments	Allow
Invoice	Allow
Main v2	Allow
MFP Scan	Not Set
Patient Health Record	Allow
PowerPoints	Allow

Done

Note that the effective permissions are set by the role, rather than the individual user.

Appendix

Department _____

19

20

Document Type:	
Who can view/search for this document?	
Who cannot view/search for this document?	
Who should manage this document?	
Who can edit or make changes to this document?	
Who will index/file this document?	
Who can delete this document?	

Document Type:	
Who can view/search for this document?	
Who cannot view/search for this document?	
Who should manage this document?	
Who can edit or make changes to this document?	
Who will index/file this document?	
Who can delete this document?	

Document Type:			
Attribute Name	Data Type	Required?	Notes

Document Type:			
Attribute Name	Data Type	Required?	Notes

Administrators

<input type="checkbox"/>	Add Document
<input type="checkbox"/>	Delete Batch
<input type="checkbox"/>	Delete Document
<input type="checkbox"/>	Manage Document Type
<input type="checkbox"/>	Update Document
<input type="checkbox"/>	View Deleted Documents

Supervisors

<input type="checkbox"/>	Add Document
<input type="checkbox"/>	Delete Batch
<input type="checkbox"/>	Delete Document
<input type="checkbox"/>	Manage Document Type
<input type="checkbox"/>	Update Document
<input type="checkbox"/>	View Deleted Documents

Role/User

<input type="checkbox"/>	Add Document
<input type="checkbox"/>	Delete Batch
<input type="checkbox"/>	Delete Document
<input type="checkbox"/>	Manage Document Type
<input type="checkbox"/>	Update Document
<input type="checkbox"/>	View Deleted Documents

Role/User

<input type="checkbox"/>	Add Document
<input type="checkbox"/>	Delete Batch
<input type="checkbox"/>	Delete Document
<input type="checkbox"/>	Manage Document Type
<input type="checkbox"/>	Update Document
<input type="checkbox"/>	View Deleted Documents

Role/User

<input type="checkbox"/>	Add Document
<input type="checkbox"/>	Delete Batch
<input type="checkbox"/>	Delete Document
<input type="checkbox"/>	Manage Document Type
<input type="checkbox"/>	Update Document
<input type="checkbox"/>	View Deleted Documents

Role/User

<input type="checkbox"/>	Add Document
<input type="checkbox"/>	Delete Batch
<input type="checkbox"/>	Delete Document
<input type="checkbox"/>	Manage Document Type
<input type="checkbox"/>	Update Document
<input type="checkbox"/>	View Deleted Documents

Role/User

<input type="checkbox"/>	Add Document
<input type="checkbox"/>	Delete Batch
<input type="checkbox"/>	Delete Document
<input type="checkbox"/>	Manage Document Type
<input type="checkbox"/>	Update Document
<input type="checkbox"/>	View Deleted Documents

Role/User

<input type="checkbox"/>	Add Document
<input type="checkbox"/>	Delete Batch
<input type="checkbox"/>	Delete Document
<input type="checkbox"/>	Manage Document Type
<input type="checkbox"/>	Update Document
<input type="checkbox"/>	View Deleted Documents

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