



USER'S GUIDE

Version 10.0




informa
software

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Introduction to IQmfp

IQmfp is a simple electronic filing system for select models of HP LaserJet MFPs, HP ScanJet workgroup scanners and HP Digital Senders. Easy to use and install, the IQmfp document management solution is integrated with the MFP front panel and allows documents to be scanned into a SQL database for indexing and OCR processing for full-text search. There are connectors for storage and retrieval of Microsoft Office documents and WordPerfect files, as well as Microsoft Outlook email and attachments. The Windows Explorer Connector allows indexing and retrieval of a wide range of electronic files, and IQmfp can be configured for easy integration with the HP Smart Document Scan Software (SDSS) included with ScanJet workgroup series scanners.

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

IQmfp Support

(407) 215-1291

iqmfp.support@informasoftware.com

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

Scanning Documents to IQmfp

To scan documents into IQmfp, load the Automatic Document Feeder or ADF on top of the HP MFP device with up to 50 sheets to be scanned. A group of documents scanned at the same time is called a “batch”.

Note: The ADF capacity limit does not reflect the limit of your batch size. See the section “Scanning the Documents” on the following page for more information on adding additional images to a batch.

Press the IQmfp icon on the HP MFP front panel as illustrated in **Figure 1.1** to begin the scan process.

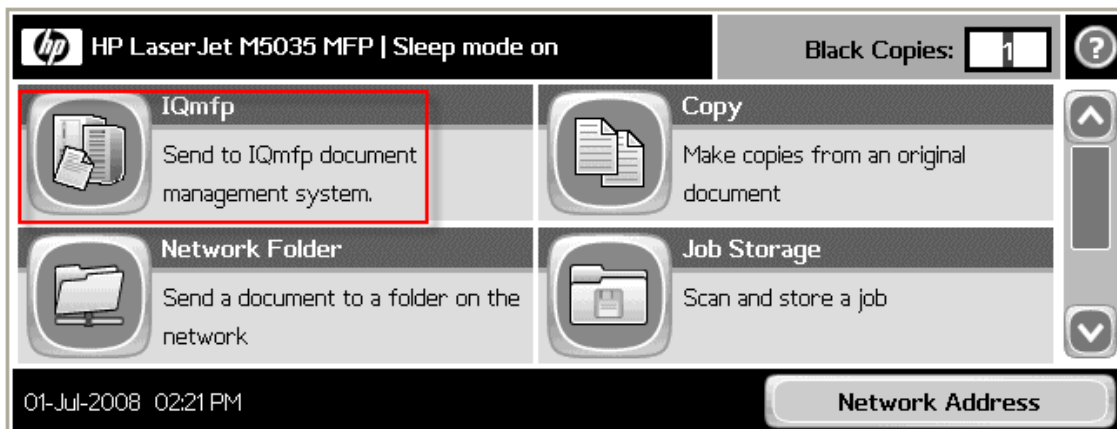


Figure 1.1: HP MFP front panel

User Selection

The IQmfp User Selection screen in **Figure 1.2** on the following page allows for the selection of a name to route scanned documents from a scrollable user list screen.

Select a user from the list. If a user is not in the selection list, please contact your network administrator. IQmfp will route any scanned batches to this user for access in the Indexing Queue when the user logs in to IQdesktop. See “Indexing Documents,” p. 11, for more information.

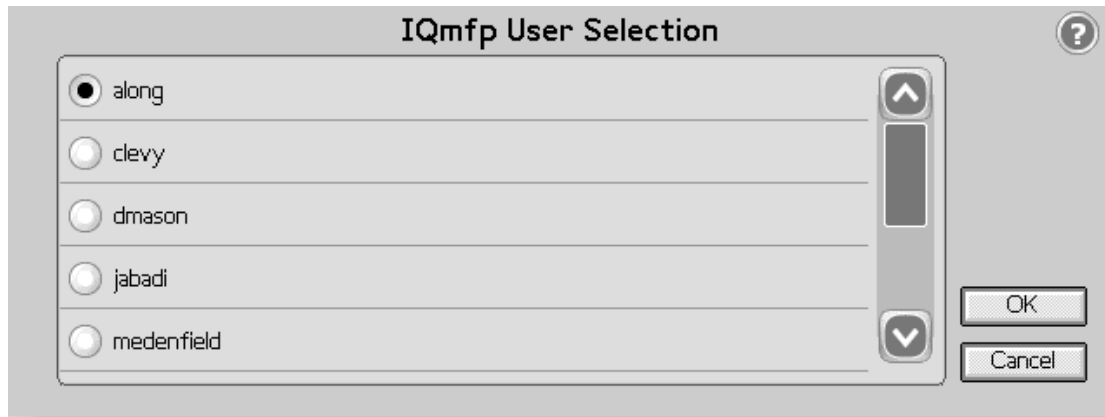


Figure 1.2: IQmfp User Selection

Press “OK” to continue to the **Scanner Status: Ready to Scan** screen.

Scanning the Documents

Follow the instructions on the screen in **Figure 1.3**.

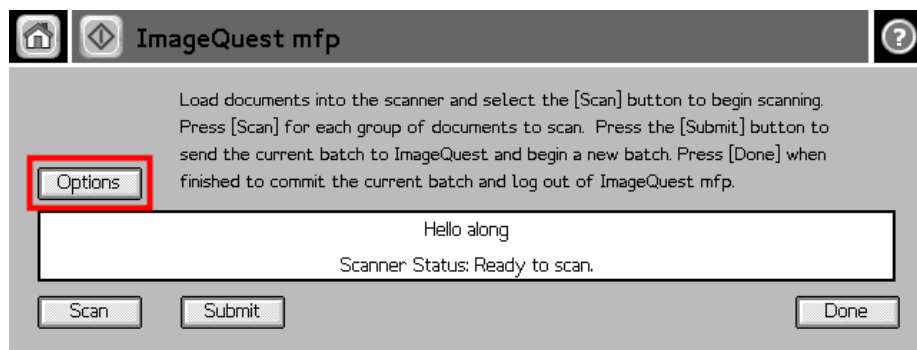


Figure 1.3: Ready to Scan

Select the IQmfp “Options” button to verify the MFP is configured correctly for the scanning process as displayed in **Figure 1.4**.

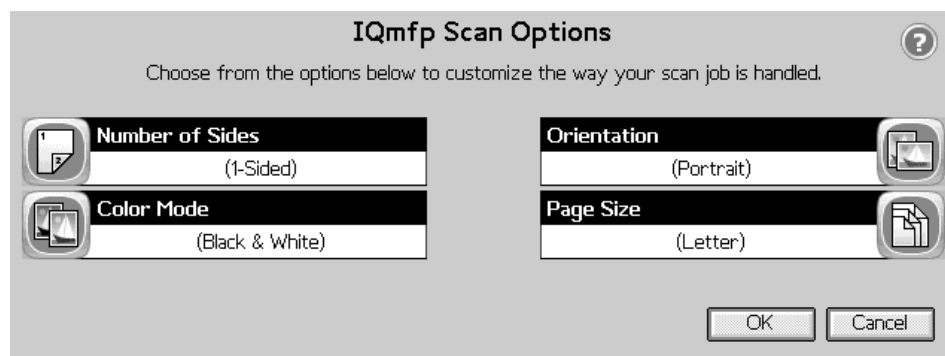


Figure 1.4: IQmfp Scan Options

Select any special settings needed for this batch of documents and click the “OK” button to return to the **Ready to Scan** screen.

Note: Some HP MFP devices do not scan duplex on one pass. For 2-sided pages, the device will scan one side, then pull the image back through to scan the other side. Scanning 2-sided pages on the device will double the time of scanning per page.

In **Figure 1.5**, press “Scan” to begin scanning the documents.

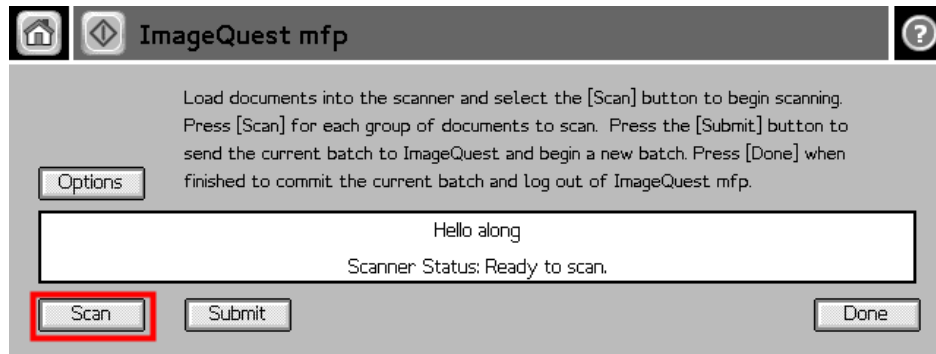


Figure 1.5: Ready to Scan

The **Scanner Status** changes to **Scanning** as the documents are scanned as shown in **Figure 1.6**.

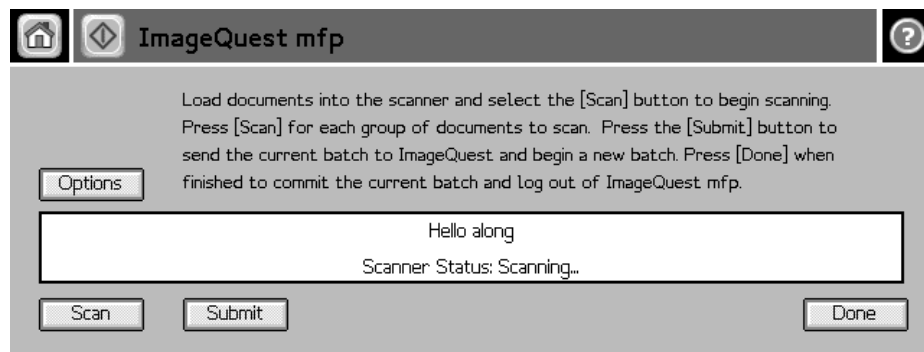


Figure 1.6: Scanning

If your document or batch has more than 50 pages, wait for the first 50 pages to finish scanning and for the MFP to return to **Scanner Status: Waiting for Documents** as noted in **Figure 1.7** on the following page.

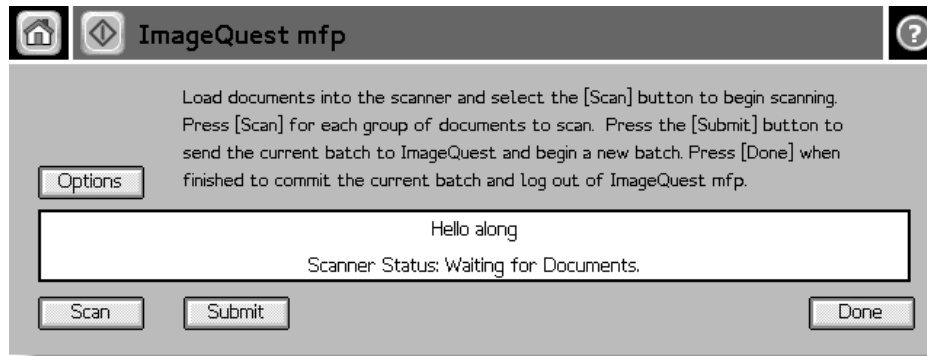


Figure 1.7: Waiting for Documents

Load the additional pages into the ADF and then press the “Scan” button again to append the additional pages to the document.

Completing the Batch

If you have more than one batch of documents to scan, wait for the first batch to finish scanning, load the ADF with the second batch, and press “Submit”. This sends the first batch to IQmfp and returns focus to this screen in **Figure 1.8** to scan again without logging the user out.

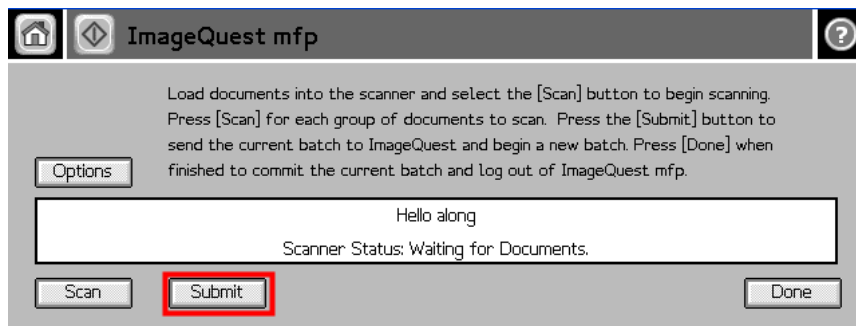


Figure 1.8: ImageQuest mfp—Waiting for Documents

The **Status Message** in **Figure 1.9** shows that ImageQuest MFP is uploading the current batch to the IQ Server. Press “OK” and press “Scan” to scan more documents, or press “Done” when finished to log out and return to the MFP front panel.

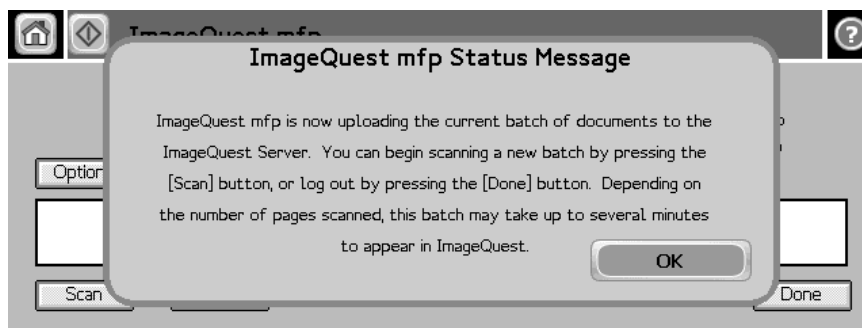


Figure 1.9: ImageQuest mfp Status Message

IQdesktop

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

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

Launching IQdesktop

Once the user has scanned documents to IQmfp, the user is ready to launch IQdesktop as shown in **Figure 2.1**. Go to Start > All Programs > Informa Software > ImageQuest and click IQdesktop.

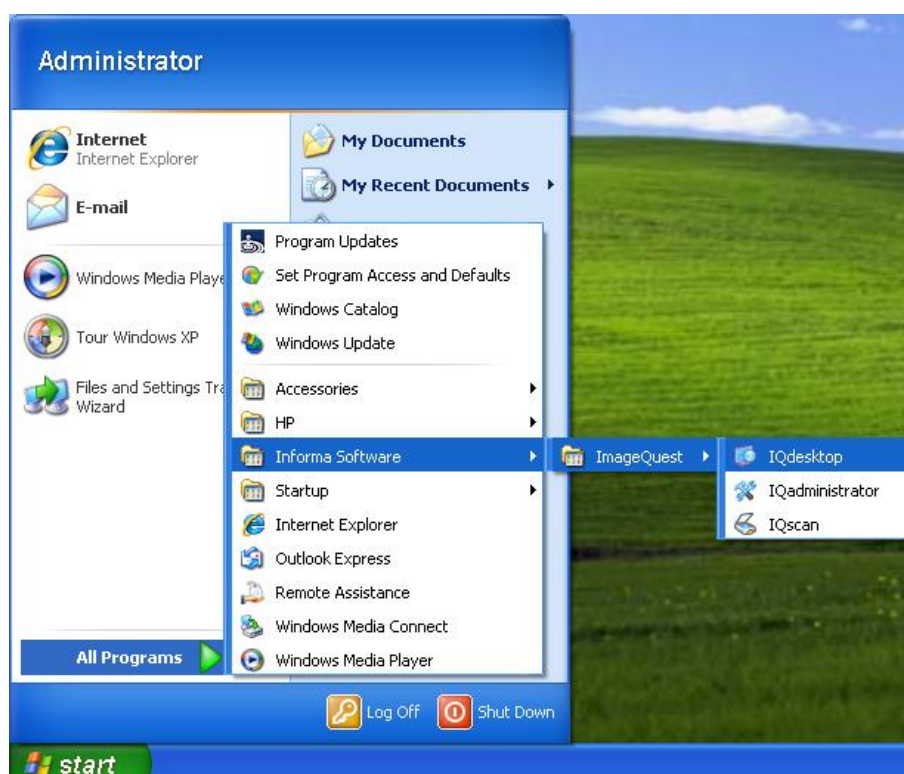


Figure 2.1: Launch IQdesktop

Figure 2.2 on the following page shows the default layout to IQdesktop's major features: "Toolbar," "Search," "Indexing" and "Lists".

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

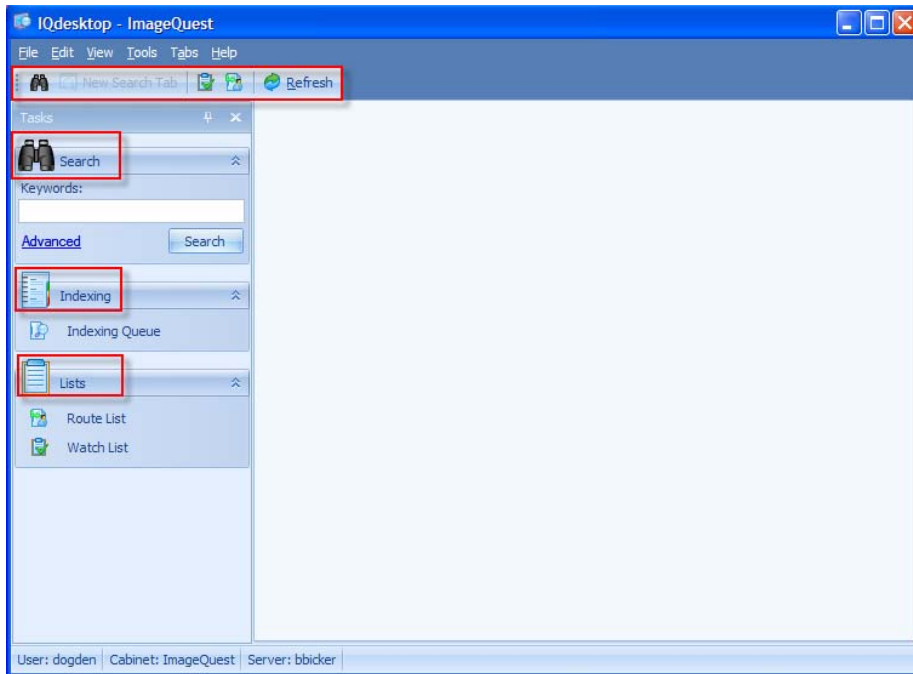


Figure 2.2: IQdesktop

Indexing Documents

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

To view the Document Indexing screen, locate the "Indexing" section on the Tasks panel and click "Indexing Queue" as highlighted in **Figure 2.3**.

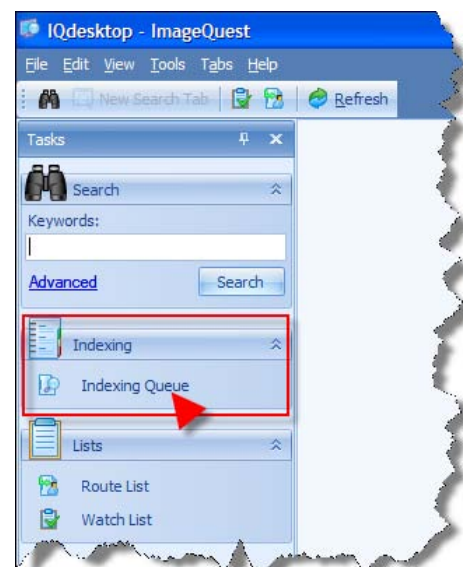


Figure 2.3: Indexing Queue

Note: The “Add Document” permission is required to allow users to add a document for indexing. See the *IQmfp Administrator's Guide 10.0: Manage Users and Roles* to allow or deny permissions.

The Indexing Queue shows all available document batches for the user logged into IQdesktop as illustrated in **Figure 2.4**. Document batches may be indexed, deleted or reassigned to another user or role.

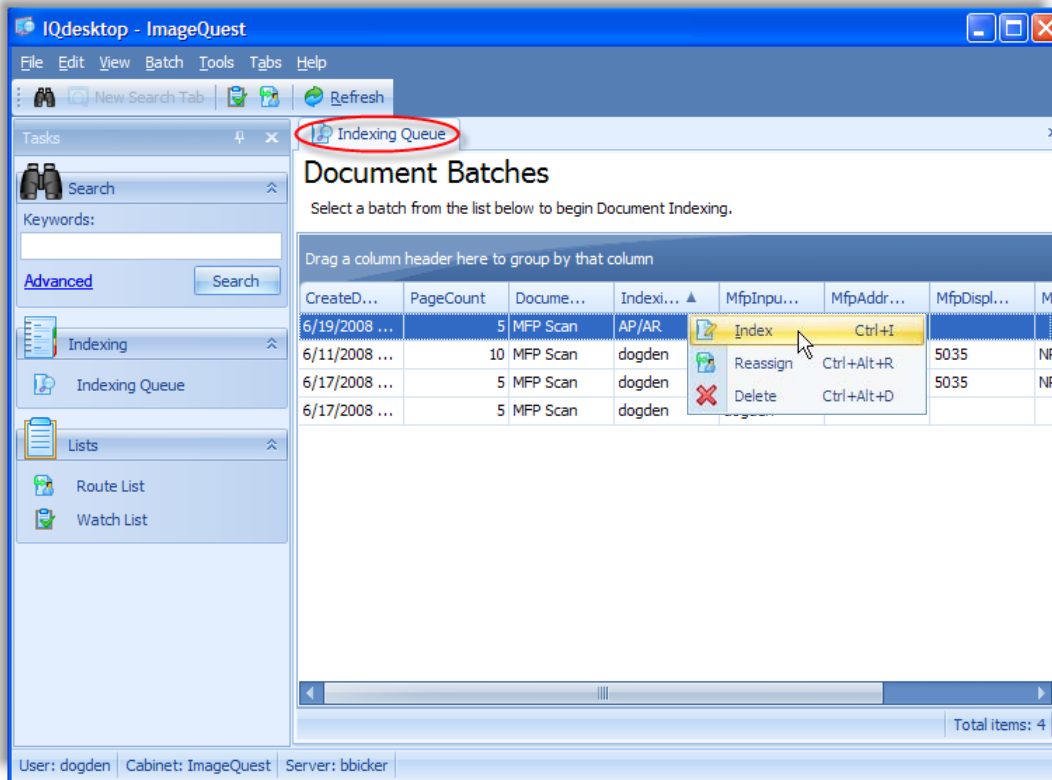


Figure 2.4: Document Batches

The **Index** feature allows users to save documents in IQmfp and establish their search criteria with their corresponding attributes to effectively and efficiently locate those documents. To index a batch, highlight the batch and select **Index (Ctrl+I)** from the “Batch” menu or right-click the batch and select **Index**. See “Indexing and Committing Batches” beginning on pg. 14 for more information.

To reassign a batch to another user or role, highlight the batch and select **Reassign (Ctrl+Alt+R)** from the “Batch” menu, or right-click the batch and select **Reassign**; to reassign all batches, press **Ctrl+A** to select all as highlighted in **Figure 2.5** on the following page and then select **Reassign**. The **Ctrl** key can also be used to select multiple batches.

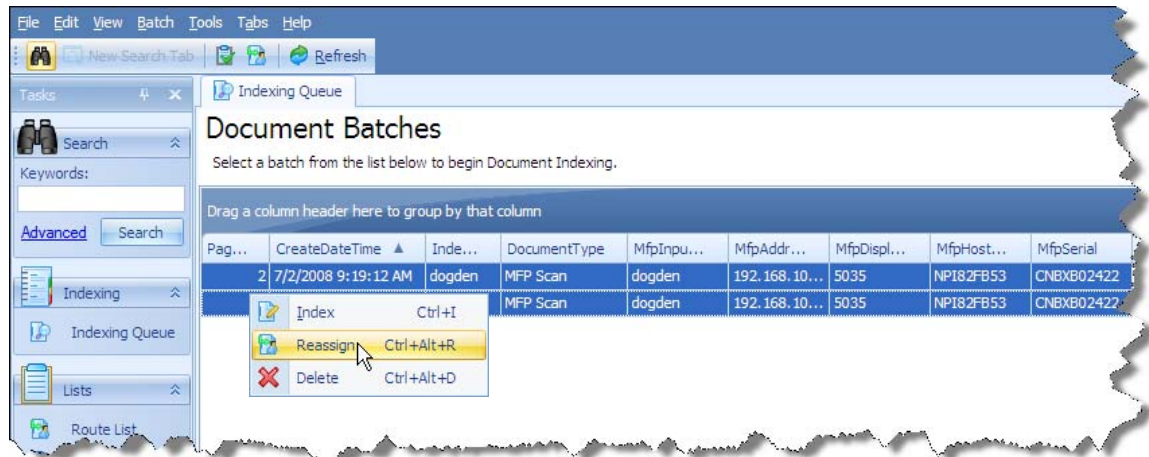


Figure 2.5: Reassign Batch or Multiple Batches

In the “Batch Reassignment” window in **Figure 2.6**, use the drop-down menu to select the user or role to reassign the selected batch to as demonstrated and click “OK”.

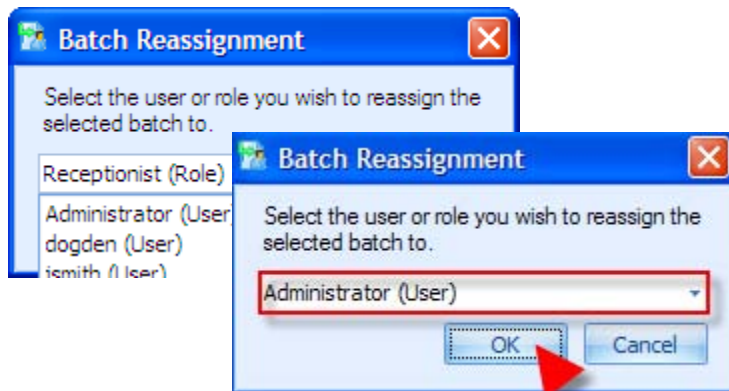


Figure 2.6: Batch Reassignment

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

To delete a batch from the Indexing Queue, right-click on the highlighted batch and select **Delete** or highlight the applicable batch(es) and select **Delete (Ctrl+Alt+D)** from the Batch menu as demonstrated in **Figure 2.7**. The user will be prompted with a confirmation window as seen on the following page in **Figure 2.7.1**.

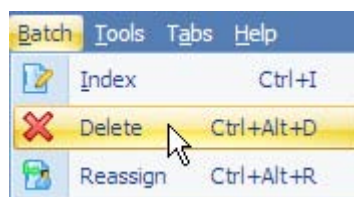


Figure 2.7: Deleting Document Batches

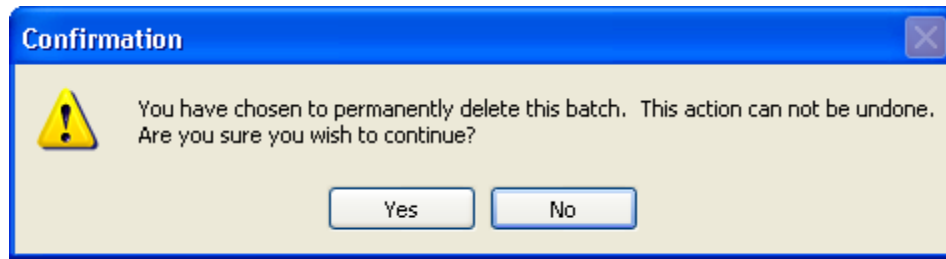


Figure 2.7.1: Delete Confirmation

Note: "Delete Batch" permission is required to delete a batch from the Indexing Queue.

Indexing and Committing Batches

Document batches are "time-stamped" with the specific time they were scanned at the HP MFP device. To choose one of the batches to index, highlight the batch as demonstrated in **Figure 2.8**, double-click it or right-click to open the menu and select **Index (Ctrl+I)**. This will open the main Indexer screen.

Note: Multiple batch selection is NOT available for the Index (Ctrl+I) option; only one batch can be indexed at a time.

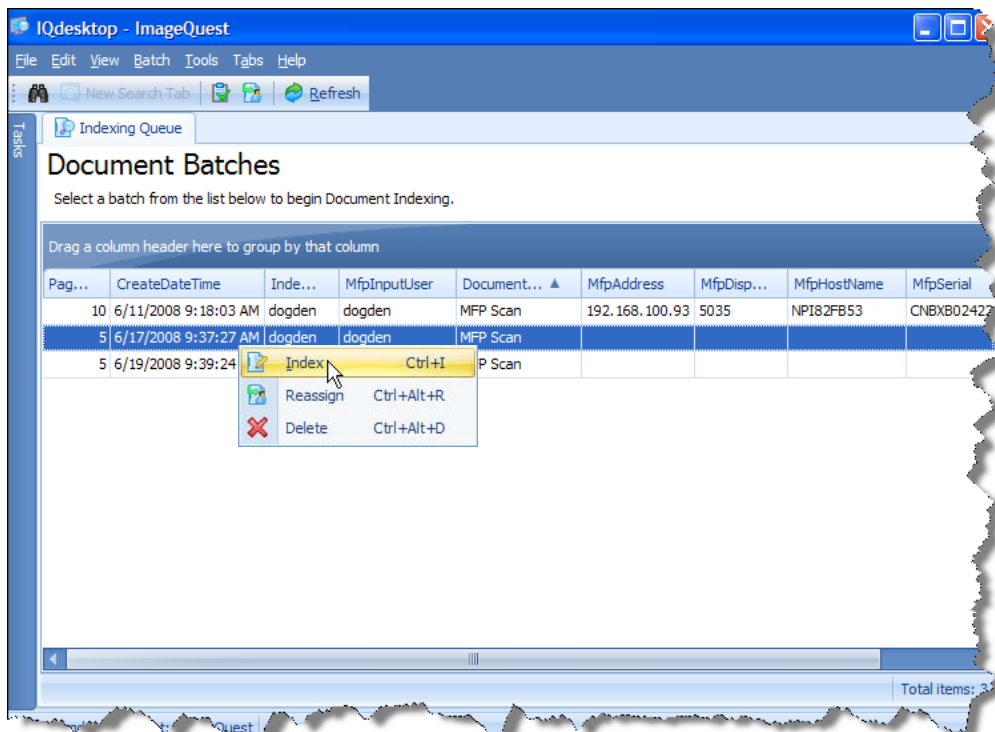


Figure 2.8: Indexing a Batch

The Indexer screen allows a user to view the individual pages of the batch and designate pages as the beginning of documents for indexing. See **Figure 2.9** on the following page to locate the "Pages," "On Screen Help" and the "Document Window" to "Zoom," "Rotate" or "Smooth" the document image.

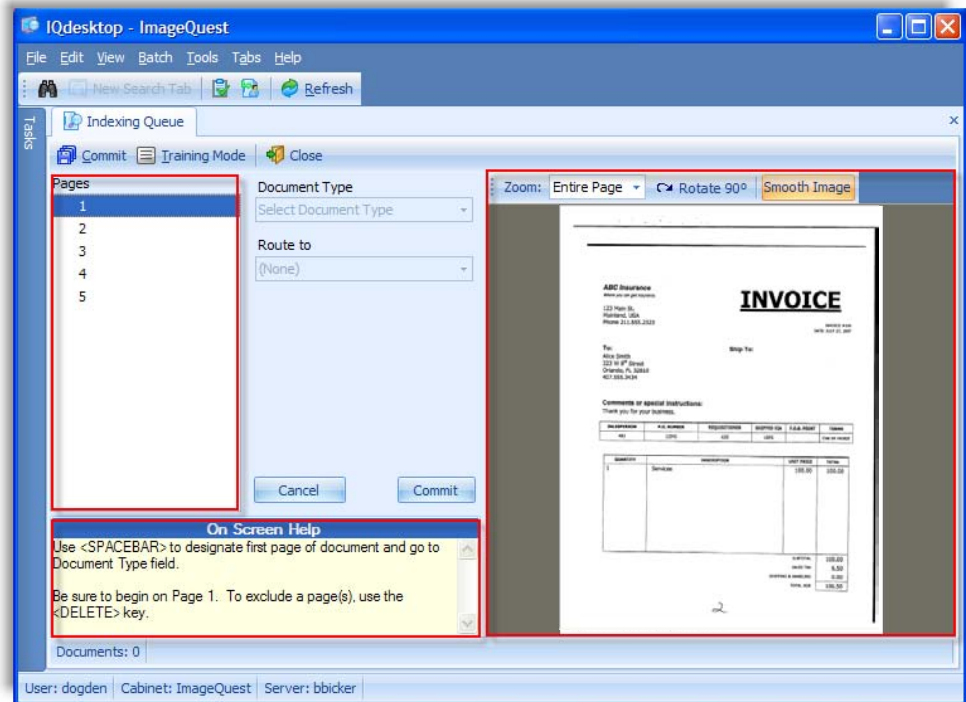


Figure 2.9: Indexing Documents

The “**Pages**” pane allows the user to click each page number to view each scanned page; the “**On Screen Help**” in the lower, left corner in **Figure 2.10** provides simple directions, for example, to designate each page or to delete a page, and the directions will change as progress is made on indexing the documents.

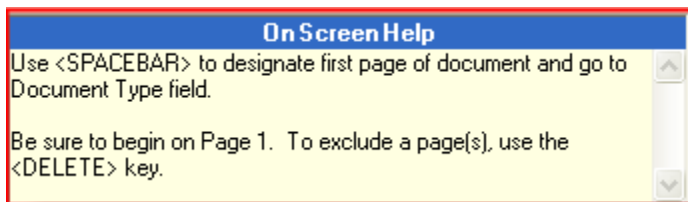


Figure 2.10: On Screen Help

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

To make the image larger or smaller in the document window, click and select a size from the “**Zoom**” drop down menu as displayed below in **Figure 2.11**.

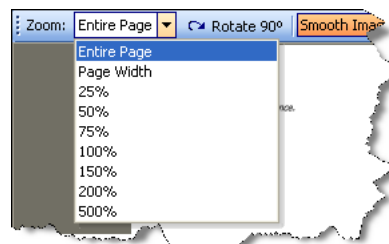


Figure 2.11: Zoom

Click the **Rotate 90°** button to rotate the image as displayed in **Figure 2.12**. This rotation will persist when the page is saved in IQmfp.

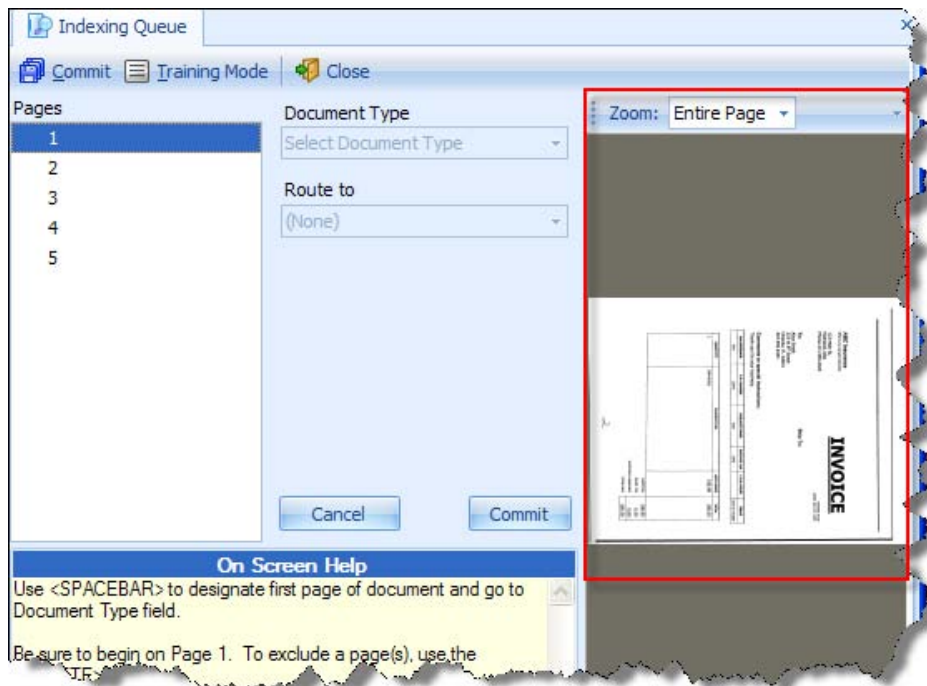




Figure 2.12: Rotate 90°

To close the window and return to the Indexing Queue, click  **Close** or to close the Indexer altogether, click  to the far right of its window as targeted in the illustration below in **Figure 2.13**. Any changes made to the current batch will be lost once the Indexer is closed.

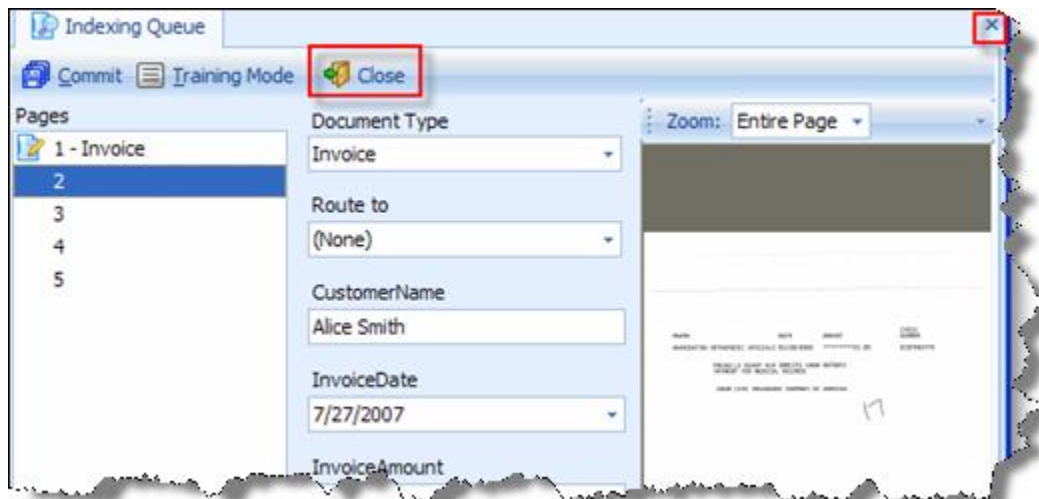



Figure 2.13: Close Window Options

To begin indexing the documents in the batch, designate the first page of the first document by using the **<SPACEBAR>** as directed in the “**On Screen Help**,” once the **<SPACEBAR>** is pressed, the  icon will appear to the left of the page number indicating that the page is the beginning of the document.

The “Document Type” drop-down menu will become active as highlighted in **Figure 2.14**; the user may also designate the first page by right-clicking on the document page and selecting **Beginning of Document**.

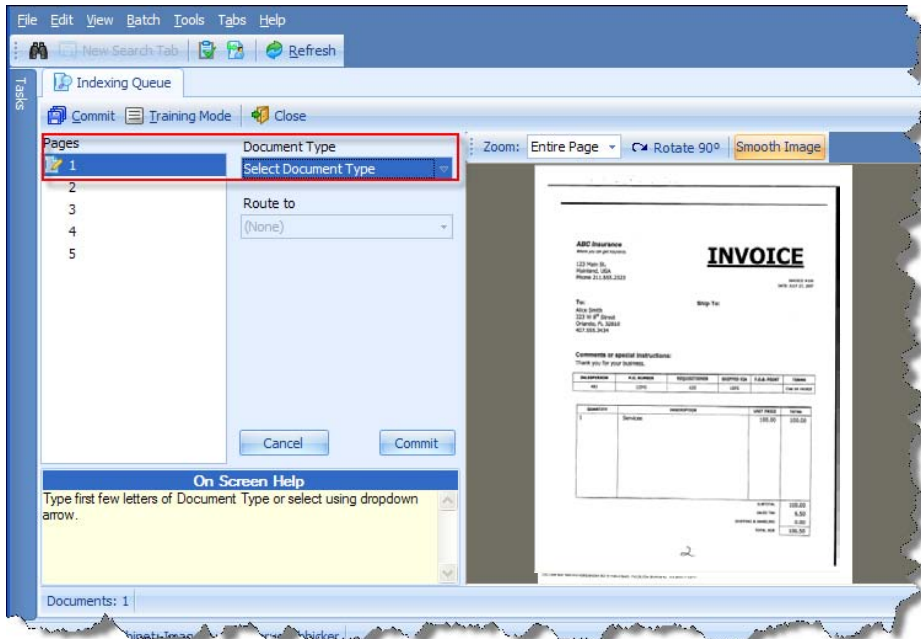


Figure 2.14: Indexing a Document

In the drop-down menu, “Document Type,” select the document type to designate the first page of the document. For example, in **Figure 2.15** on the following page, the first page of the highlighted document is an invoice which means that this page is designated as the first page of the document type, “Invoice”.

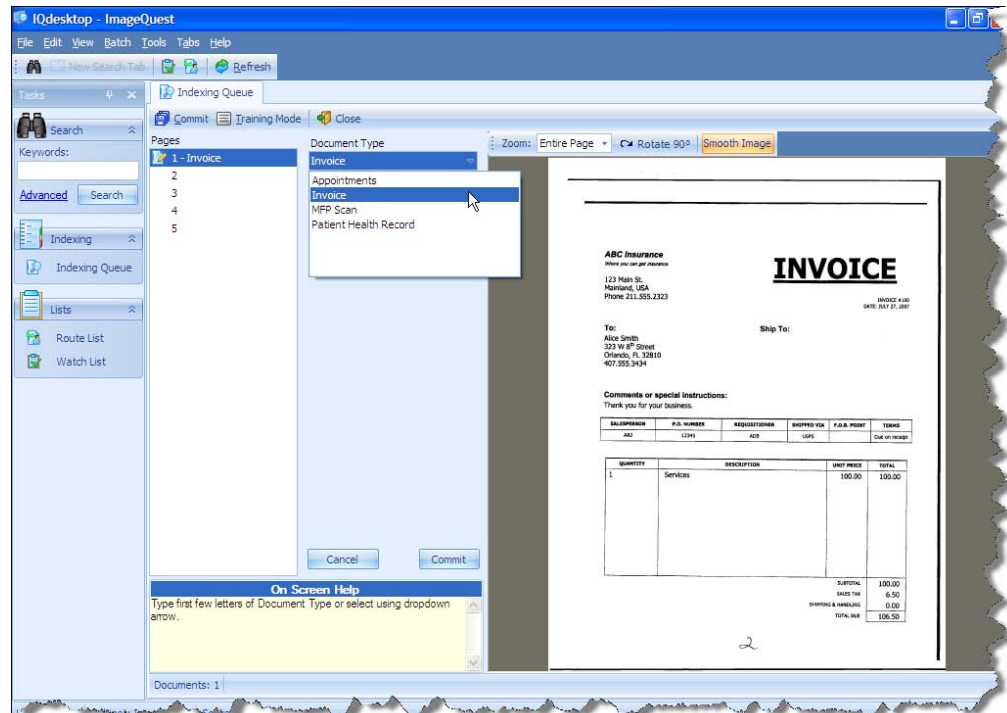


Figure 2.15: Assign page to a Document Type

Note: If a “Document Type” is not in the list, see pg. 61, for more information on “Managing Document Types” or contact your system Administrator.

When a document type is selected, the indexing fields for that document type become accessible as shown in **Figure 2.16** on the following page. The “On Screen Help” window below prompts the user to <TAB> through the index fields that appear for the document type; these fields are called “Attributes” and become the index values that are used when searching for a document within IQmfp.

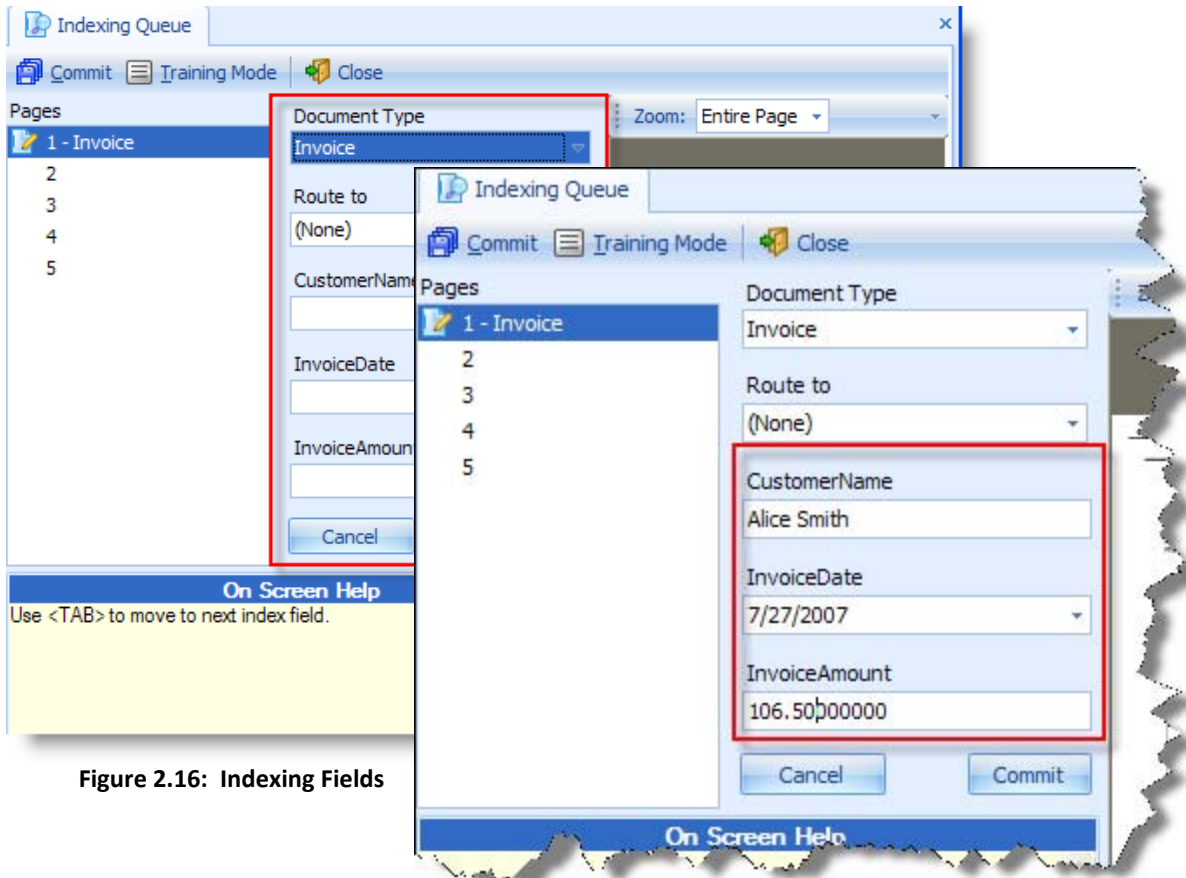


Figure 2.16: Indexing Fields

If attribute data appears on multiple pages, the attribute data will remain when selecting different pages of a document as highlighted below in **Figure 2.17** for Page 2. This is useful if the index values are located on a page other than the beginning page of the document, for example, an invoice total.

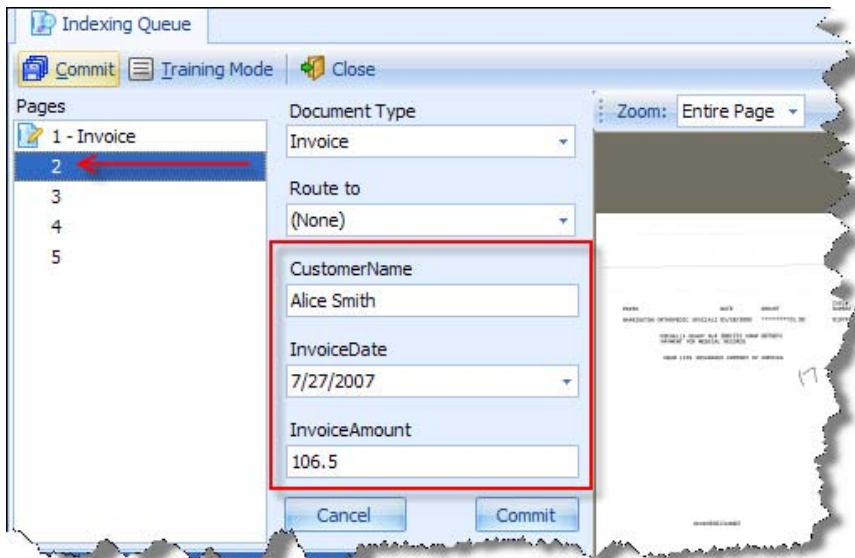


Figure 2.17: Common Indexing Fields

Once the last index field is filled in for a document type, <TAB> to return to the “Pages” pane, or click on the next page to index the additional documents with each corresponding document type and completed index values as shown in **Figure 2.18**. For example, Page 3 is a new document type, “Billing,” with Page 3 as the beginning page and Pages 4 and 5 as the attached pages; the attributes and indexing fields, “Client ID,” “Customer Name” and “InvoiceAmount” can be filled in for indexing prior to committing this batch.

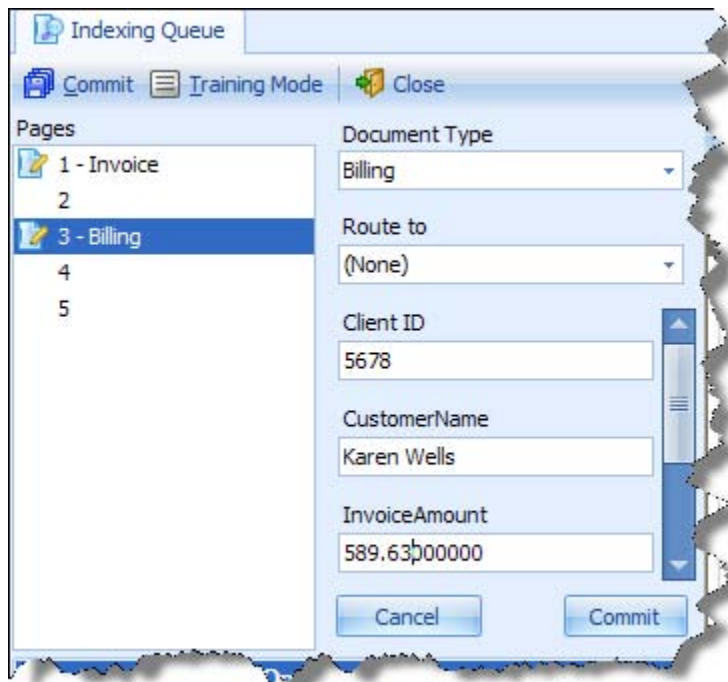


Figure 2.18: Indexing

If there are no more documents in the batch to index as shown in **Figure 2.18** above, the batch is ready to be committed; the “On Screen Help” window as highlighted in **Figure 2.19** guides the user to commit the batch after indexing all pages—“use <CTRL+S> or select “Commit” with the mouse to finish indexing the batch.”

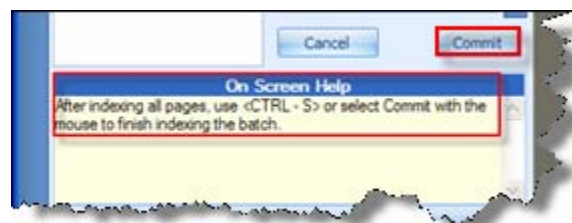


Figure 2.19: Committing a Batch

The “Confirmation” window in **Figure 2.20** on the following page appears; click “Yes”. The batch will be committed and after a few seconds, click “OK” in the “Completed” window. If you click “No,” you will return to the active batch.

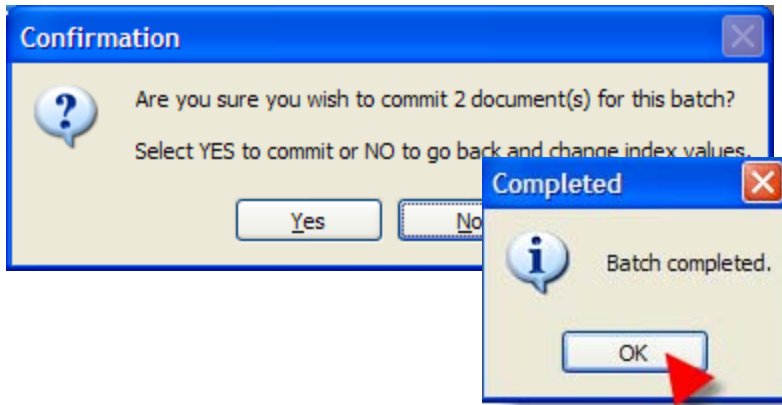


Figure 2.20: Confirmation

The “Confirmation” dialog box will report the number of documents to be stored in the Cabinet. Pages without icons next to them are not counted as part of the number of documents as illustrated in **Figure 2.21**. For example, Page 2 will be attached to Page 1 to the Document Type, “Invoice” highlighted in yellow and Pages 4 and 5 will be attached to Page 3 to the Document Type, “Billing” highlighted in blue. This results in two documents being sent into IQmfp, one two-page Invoice document and one three-page Billing document.

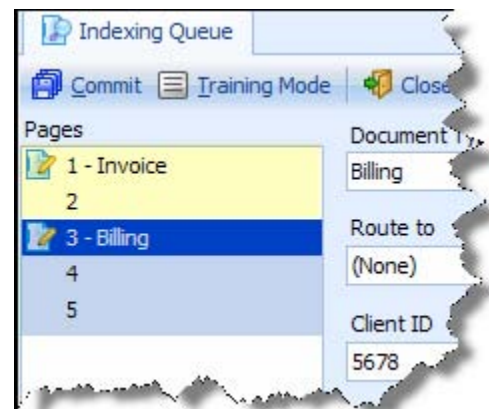


Figure 2.21: Attached Image

Note: To cancel out of “Indexing,” click “Cancel” at the bottom, left of the index fields.

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

Once a batch is committed, the user will return to the Indexing Queue to show remaining batches to index as displayed in **Figure 2.22**.

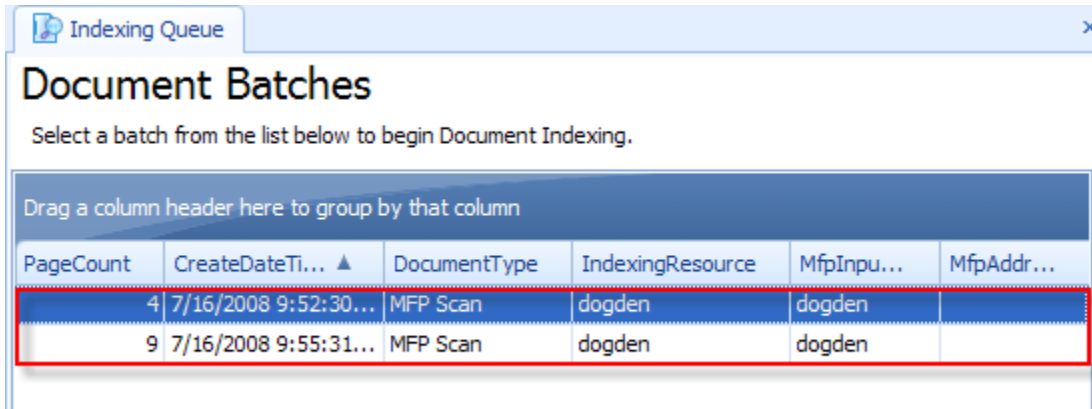


Figure 2.22: Document Batches

Page Features in the Indexing Queue

The available options on the right-click menu in **Figures 2.23** are **Beginning of Document**, **Exclude this Page**, **Move Page Up**, **Move Page Down** and **Clear Selection**. You can exclude a page from a batch by highlighting and right-clicking it to select **Exclude this page**. When the document batch is committed, the images marked to be excluded will not be included with the documents. For example, in **Figure 2.24** on the following page, Page 5 has been excluded. When this batch is committed, we will have two documents in IQmfp: one, two-page "Invoice" document consisting of Pages 1 and 2 and one, two-page "Appointments" document consisting of Pages 3 and 4.

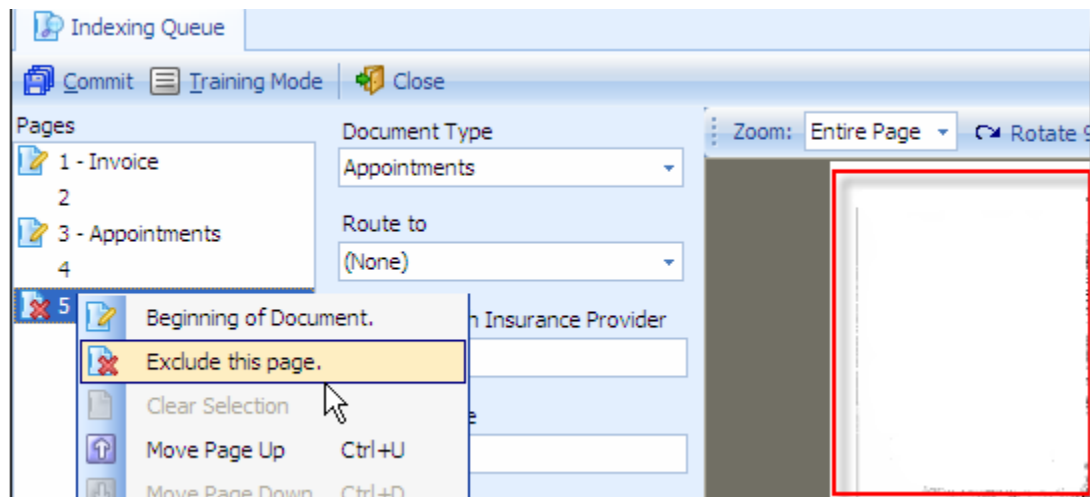


Figure 2.23: Exclude This Page

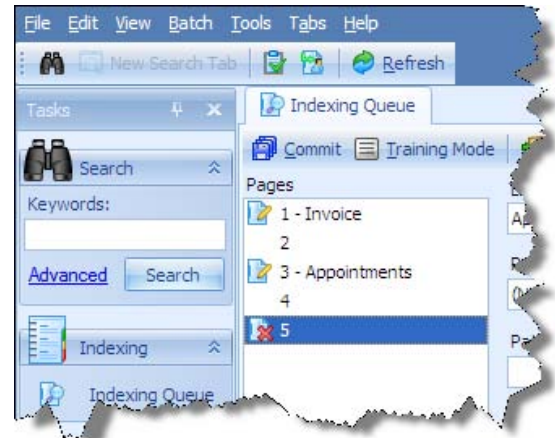


Figure 2.24: Excluding a Page

Changing the order of the pages in a batch is also possible by right-clicking on a page and selecting **Move Page Up (Ctrl+U)** or **Move Page Down (Ctrl+D)** as modeled in Figure 2.25. For example, Page 4 has been highlighted and moved up; as a result, the document type, “Invoice,” is now a three-page document consisting of Pages 1, 2 and 4, and the Document Type, “Appointments,” now only consists of Page 3 as Page 5 has been excluded.

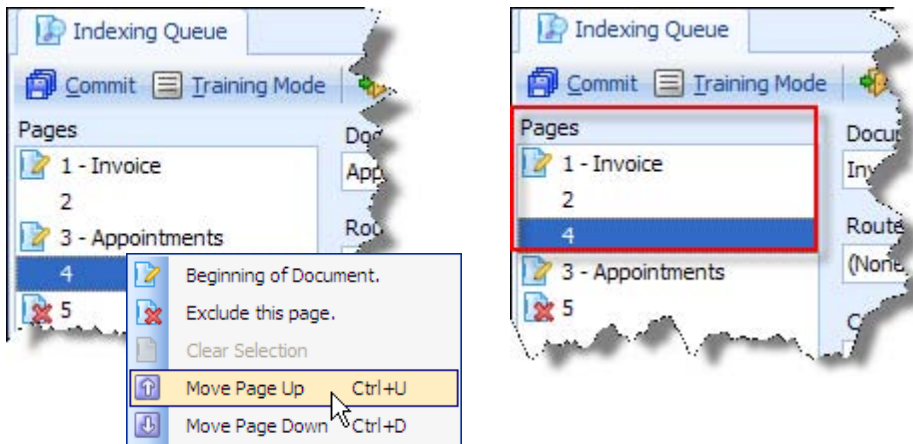


Figure 2.25: Move Page Up or Down

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

Training Mode

The feature **Training Mode** highlighted in Figure 2.26 on the following page allows focus on areas of the image to increase visibility and ease of indexing. You can use this mode to configure the document template for review. To enable this mode, click **Training Mode** below the “Indexing Queue” tab.

Next, select a Document Type and use the **Zoom** function to change the view of the document. Under each corresponding field, there will be a **Save Image Position** button as shown in Figure 2.26 on the following page.

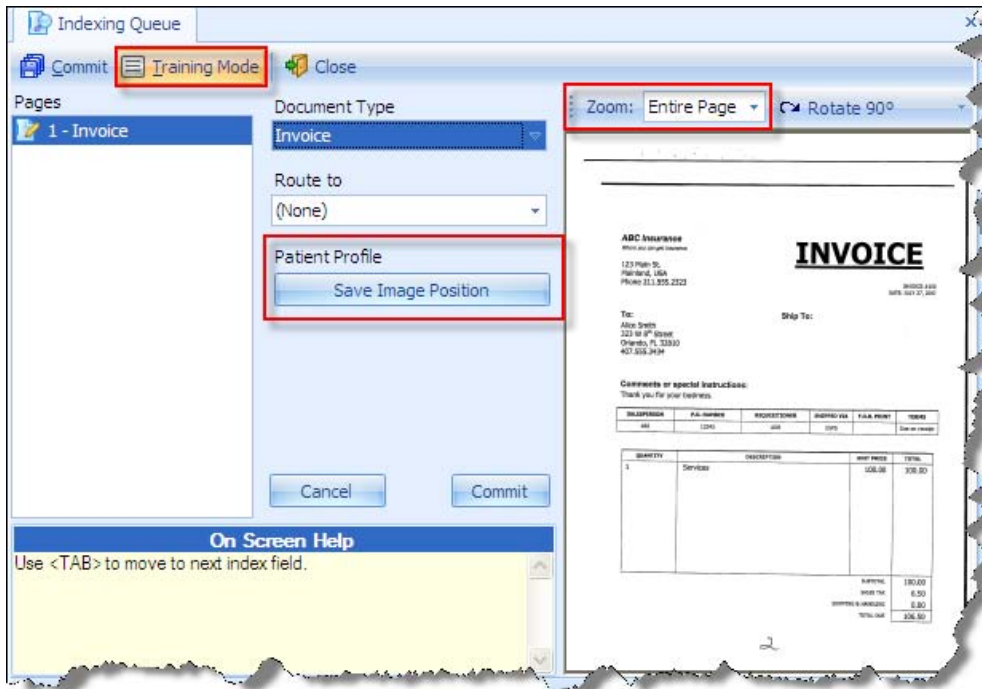


Figure 2.26: Training Mode

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


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

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

Searching for Stored Documents

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

Custom Search Tab

To initiate a search for documents, click the **Search (Ctrl+F)** icon  in the toolbar, use the “Tools” menu to select the **Search (Ctrl+F)** function as highlighted in **Figure 3.1** or click the “Advanced” link.

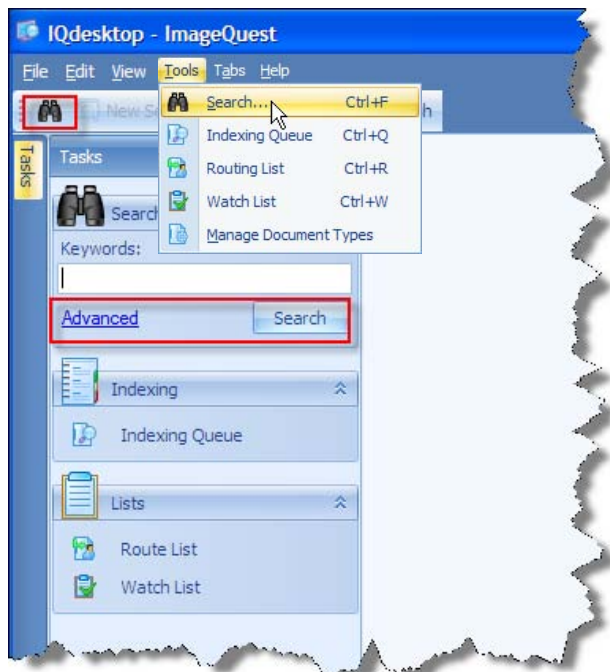


Figure 3.1: Search

In **Figure 3.2** on the following page, a search is in effect for a two page Invoice with an InvoiceDate of 7/2/2008. By selecting a single Document Type, the list of all available attributes on the right is changed to reflect only those attributes associated with that Document Type. Click “Search” once the desired index fields are completed.

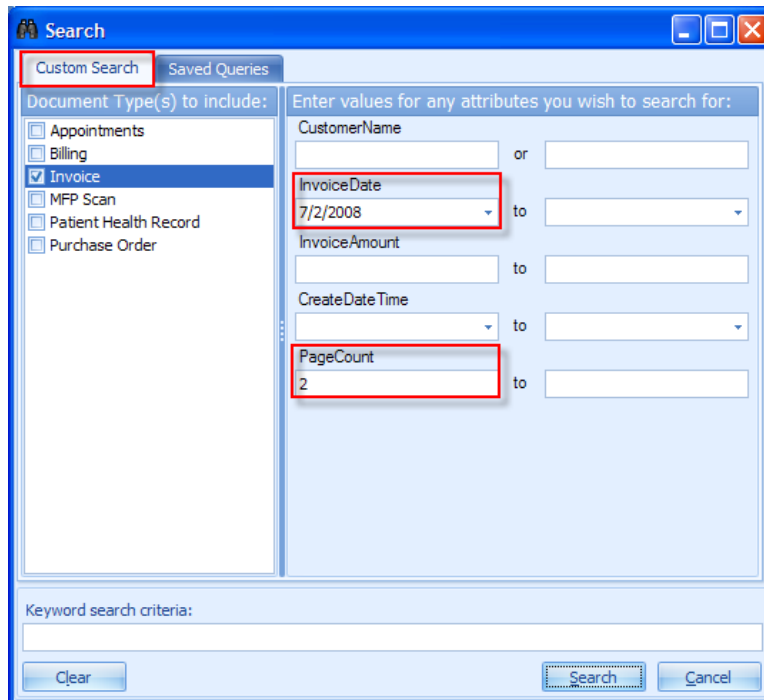


Figure 3.2: Custom Search

The custom search results in **Figure 3.3** returns two Invoices with an InvoiceDate of 7/2/2008.

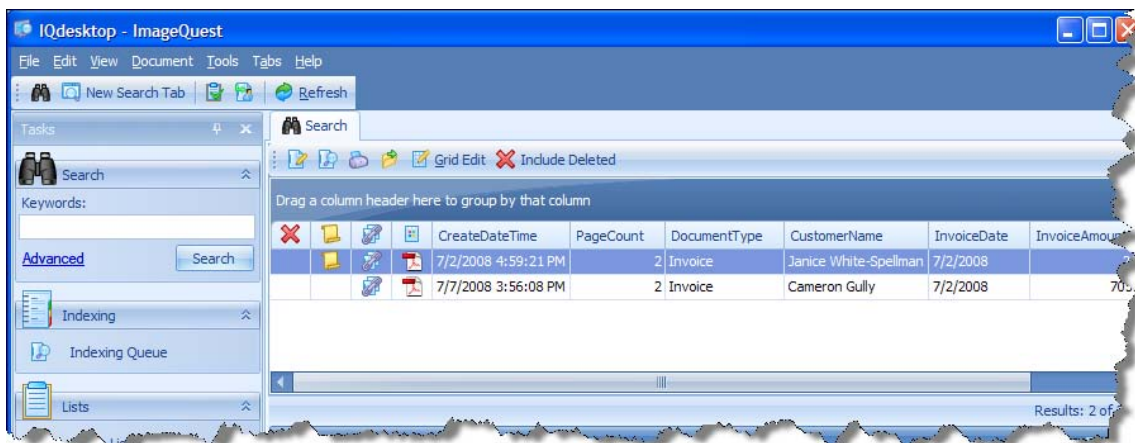



Figure 3.3: Custom Search Results

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

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

Saved Queries Tab

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

The user may perform a search using the "Saved Queries" method in IQdesktop. Click the search icon , select **Search (Ctrl+F)** in the Toolbar or click the "Advanced" link to open the "Search" window. Then, click the "Saved Queries" tab as shown in **Figure 3.4** to select a saved query from the drop down menu. Fill in any required attributes and then click the "Search" button.

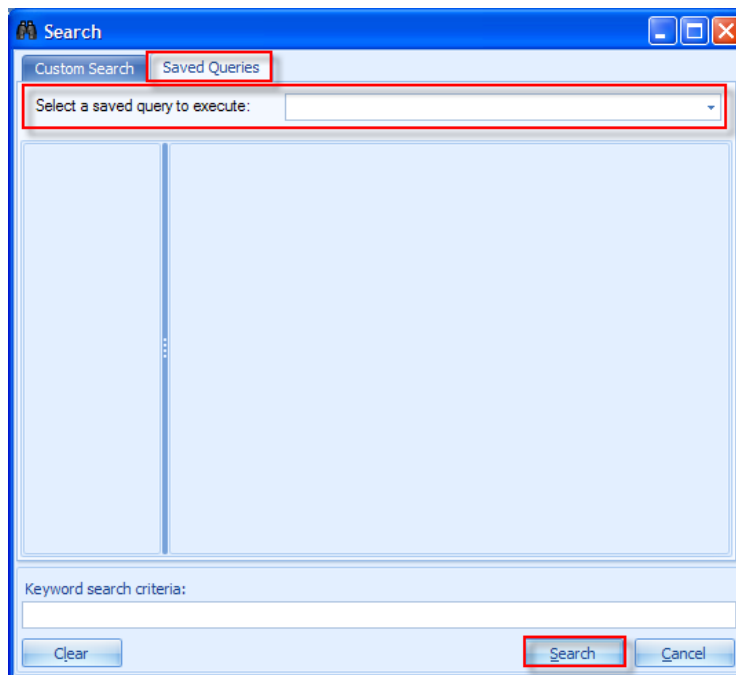


Figure 3.4: IQdesktop Search Window—Saved Queries

Figure 3.5 on the following page gives an example of a saved query search based on the "Client ID" attribute and its search result.

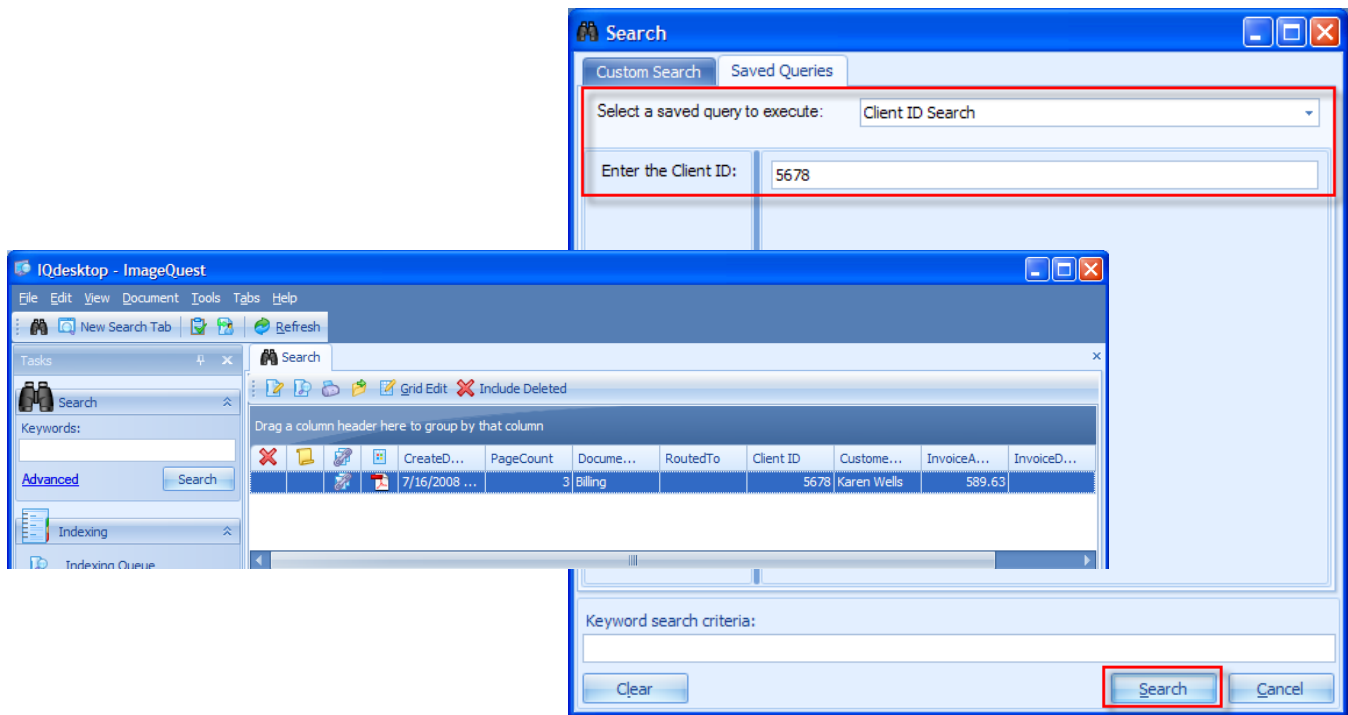


Figure 3.5: Saved Queries Search and Results

Note: Saved queries must be configured in the IQadministrator tool to be accessible from IQdesktop; see the *IQmfp Administrator's Guide 10.0* for more information on how to configure "Saved Queries".

Note: Wildcard values (*) may NOT be used when inputting the user parameters of a saved query; if Full-Text searching is enabled, keywords may be entered in addition to saved query criteria to create a combined attribute based and keyword based search. See the "Keyword Search" section for more information.

Keyword Search

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

See **Table 1** on the following page for search string examples and descriptions of valid full-text search syntax.

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

Table 1: Search Strings and Descriptions

Note: Wildcard values (*) at the beginning (*forma) or in the middle (in*ma) of a word are not supported.

Note: Full-text search results include a preview field with summary text that matched the search criteria entered.

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

To use "Keywords," enter the phrase as the search criteria (and any custom or saved query criteria), for example, "Packing List," and click "Search". See **Figure 3.6** to view the search results displaying three documents relevant to the search criteria, "Packing List".

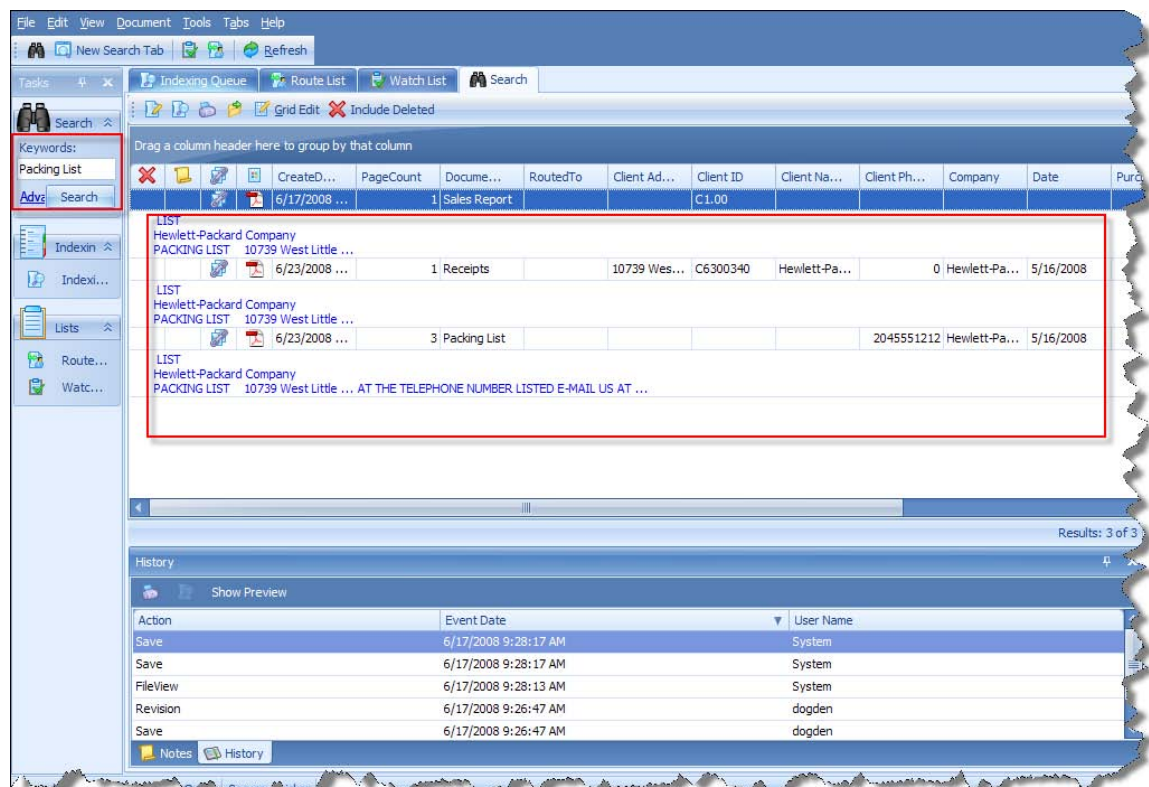


Figure 3.6: Keyword Search and Search Results

The blue highlight below each record shows a preview of the text in the document where the keyword appears. There is also a column called "Rank" as highlighted in **Figure 3.7** that gives the ranking of a document based on relevance of the criteria entered; in this example, the top Packing List document ranks at 32, and the bottom ranks at 21. The higher the ranking, the more relevant to the search criteria entered.

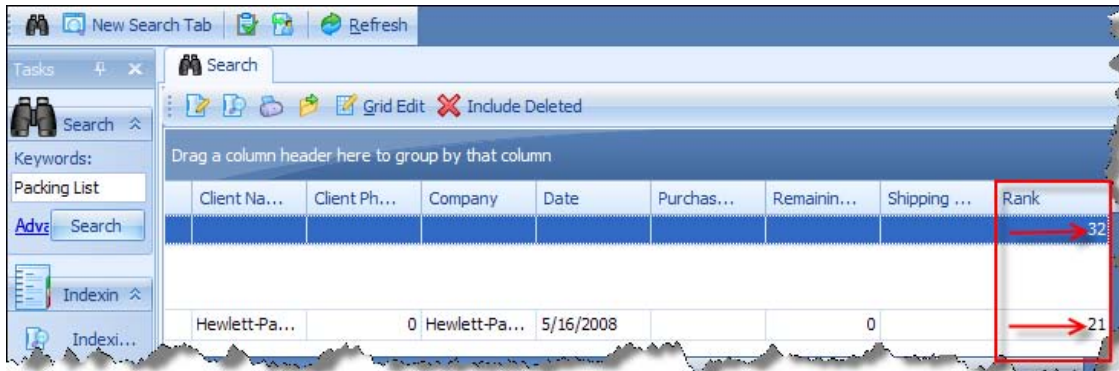


Figure 3.7: Document Rank

Note: It is possible to perform more than one search and display the search results at the same time. See pg. 52, "New Search Tab," for more information.

Viewing a Document

Once the search function locates the desired documents, the documents may be viewed. To view a document, double-click it or right-click on it to open the menu and select **View Image (Ctrl+I)** as illustrated in **Figure 3.8**. You may also use the Document menu or the toolbar button.

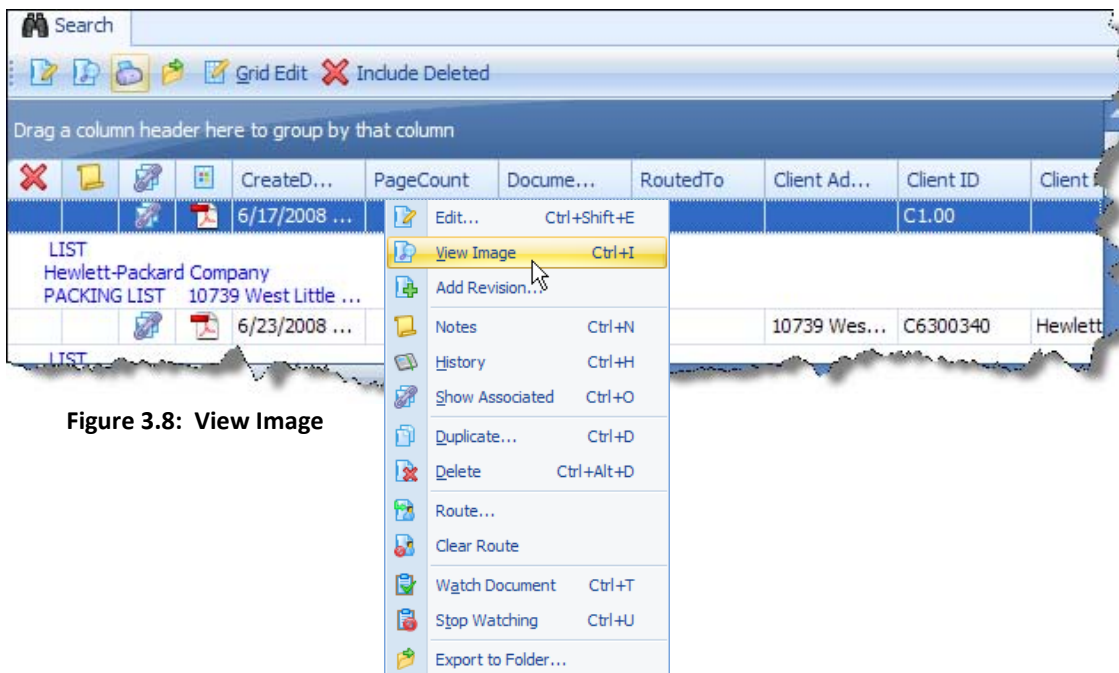


Figure 3.8: View Image

A document like the sample in **Figure 3.9** and any attached pages are displayed in the user's default image viewer; this figure shows a PDF file opened in Adobe Acrobat Reader.

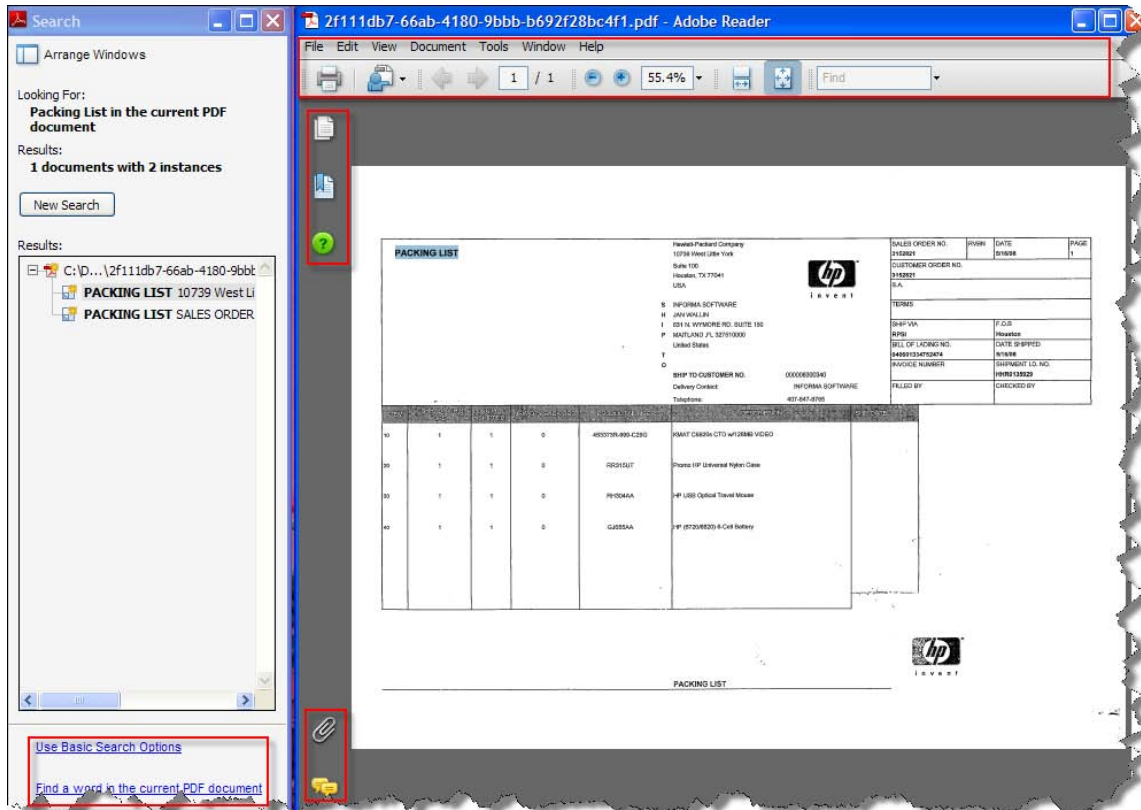


Figure 3.9: Viewing a Document

Configuring the View

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

IQdesktop is comprised of three main areas by default, the Tasks panel on the left, the search grid on top and the Notes/History panels on the bottom as seen in **Figure 4.1**. This screen can be customized in a variety of ways by hiding and closing some or all of the panels or by moving the panels to different parts of the screen.

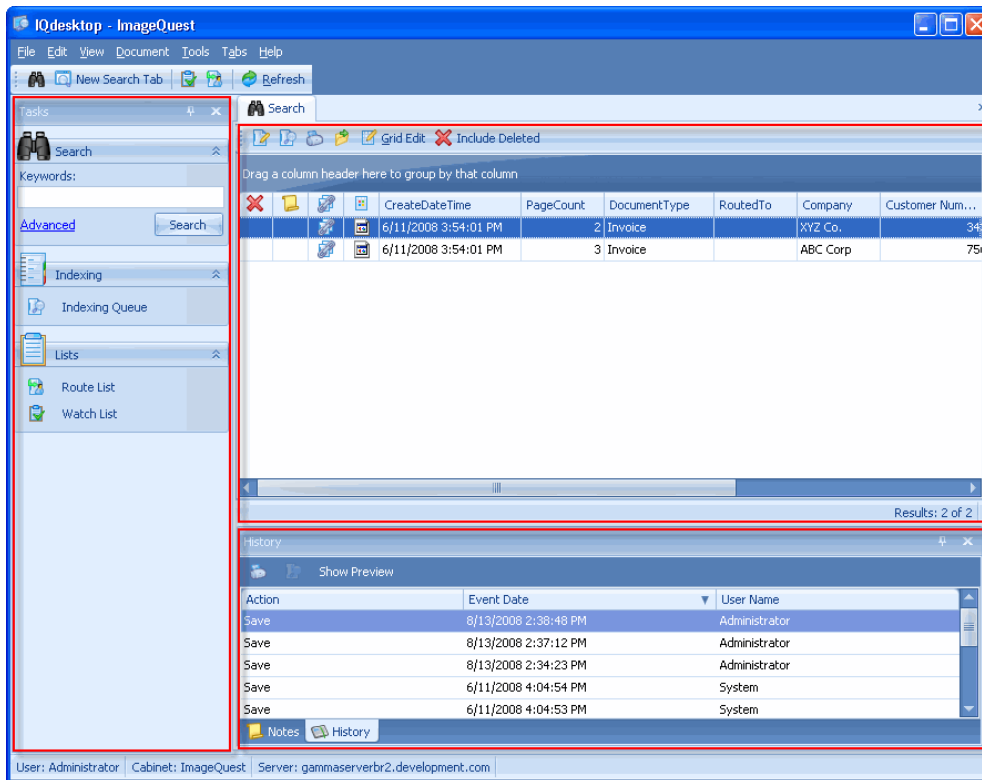


Figure 4.1: IQdesktop Main Layout

To increase screen “real estate”, locate the pushpin icons on the “Tasks”, History”, and “Notes” panels as highlighted in **Figure 4.2** on the following page. Unpinning the panels causes them to slide out of the way. To access the hidden panels, simply hover over the tabs. Click the pushpin again to allow the panels to always be shown on the screen. The panels may also be closed altogether by clicking on the **X** to the right of the pushpin.

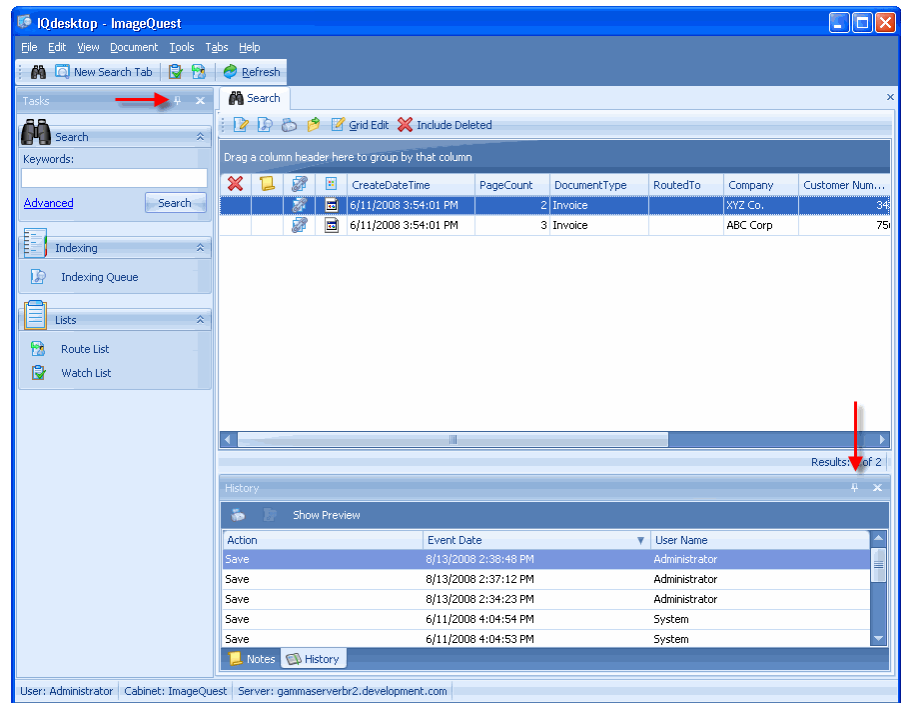



Figure 4.2: Pushpins

Another way to increase the screen “real estate” is by moving the mouse cursor between two panels until the  cursor shows up. Once the cursor changes to the double arrow click and drag the cursor to expand the panel as shown below in Figure 4.3.

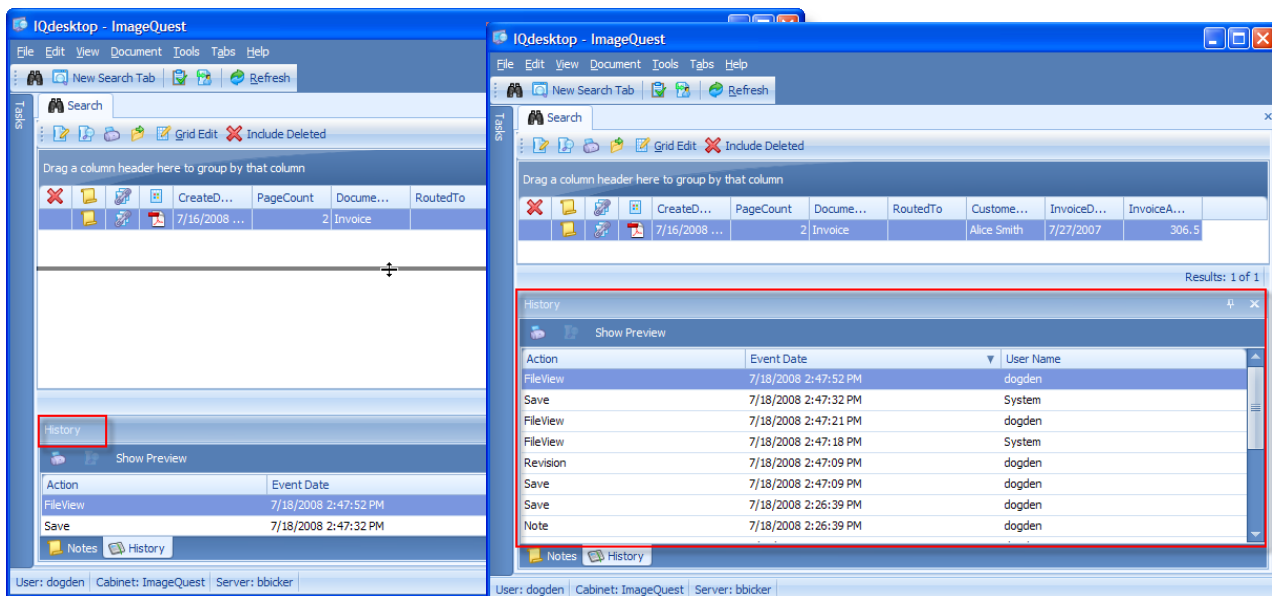


Figure 4.3: Increasing Real Estate

The three panels (Tasks, Notes and History) can also be moved around the screen and customized. To move one of the panels, first make sure that the panel is pinned. Next, click and drag the panel tab name to one of the drop position indicators as shown in **Figure 4.4**. Release the mouse button when the panel shadow preview appears in the location you want. In the example below, the “Notes” panel has been moved next to the “History” panel so both are viewable at the same time.

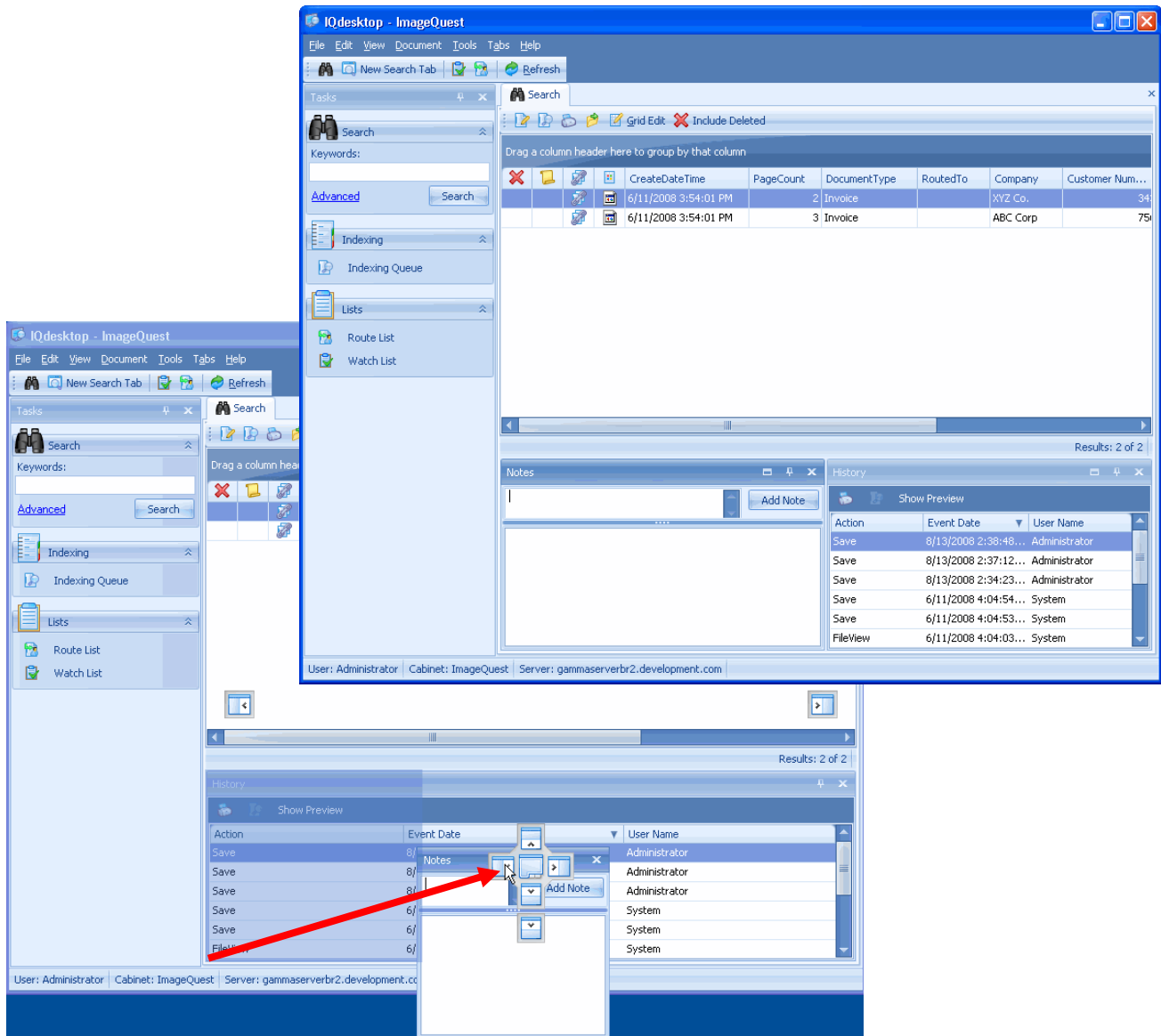


Figure 4.4: Rearranging the Panels

To return to the default window layout at anytime, go to the “View” menu and select **Default Window Layout** as illustrated in **Figure 4.5** on the following page.

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

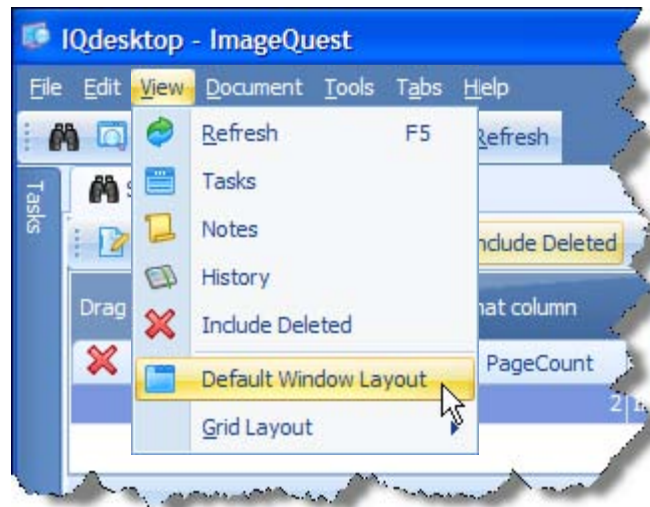


Figure 4.5: Default Window Layout

Column Customization

Figure 5.1 shows a sample of the IQdesktop column headers. The document grid columns may be customized to better meet your needs. Columns can be moved, removed, added, widened or narrowed.

CreateD...	PageCount	Docume...	Indexi... ▲	MfpInpu...	MfpAddr...	MfpDispl...	MfpHost...	MfpSerial
------------	-----------	-----------	-------------	------------	------------	-------------	------------	-----------

Figure 5.1: Column Headers

To move a column header, left-click on the column, drag and release it in the header row where the column is desired. For example, CreateDateTime in **Figure 5.2** is being moved from its default location to the right, in between PageCount and DocumentType.

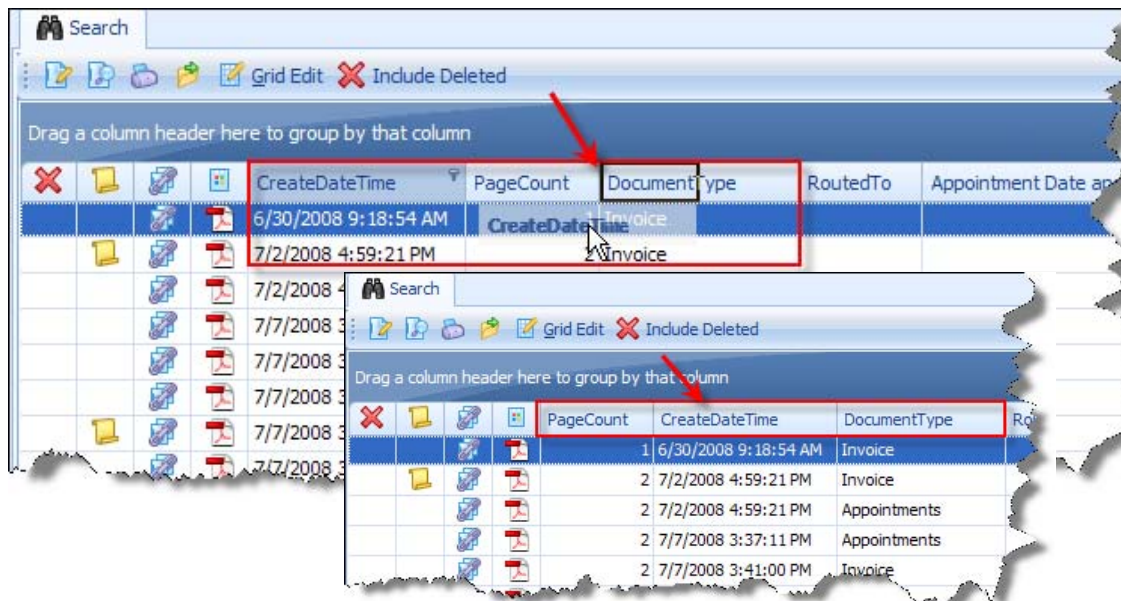


Figure 5.2: Column Customization

A user can remove a column by left-clicking on the column header to be removed and holding down the left-button to drag the column out of its initial setting as modeled in **Figure 5.3**. An **X** will appear in place of the normal mouse cursor. For example, the column, “Appointment Date and Time,” is being removed from the header.

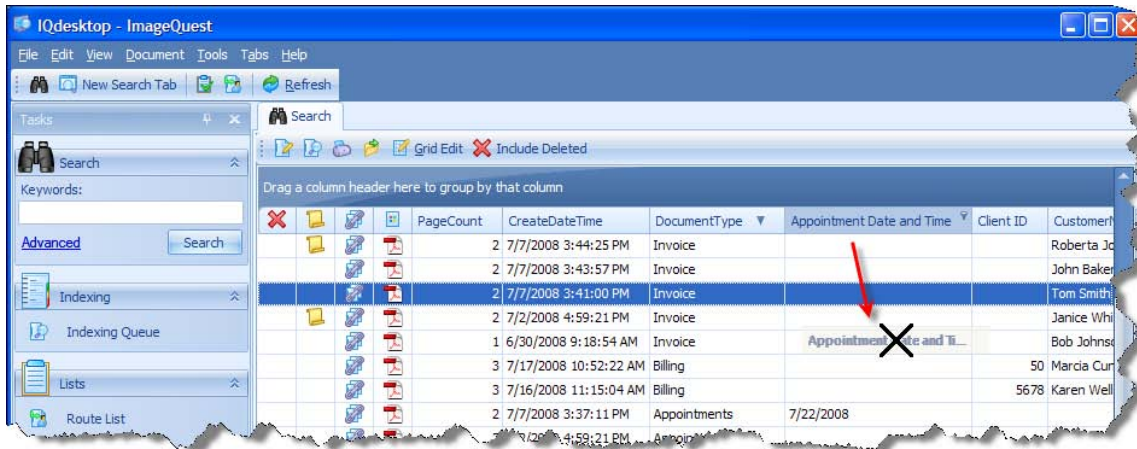


Figure 5.3: Removing a Column

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

To add a column back to the header, right-click on the header row and select **Column Chooser** from the menu as displayed in **Figure 5.4**.

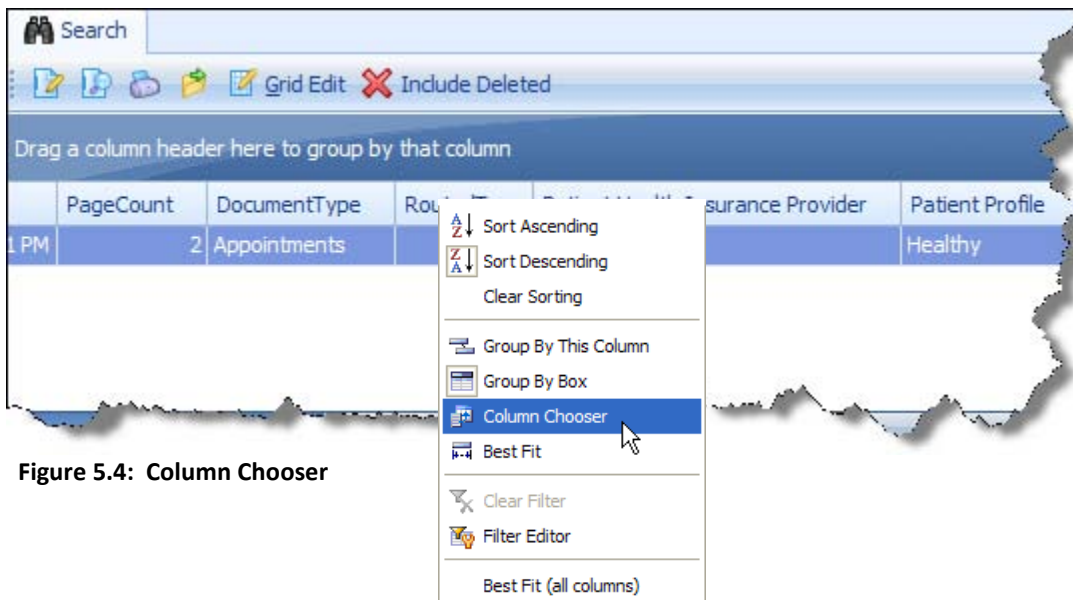


Figure 5.4: Column Chooser

The “Customization” window will open. As demonstrated in **Figure 5.5** on the following page, drag the column name from the Customization window back to the header row by left-clicking on it, dragging it and releasing it. In the example on the following page, the column, “Appointment Date and Time,” is returned to the header.

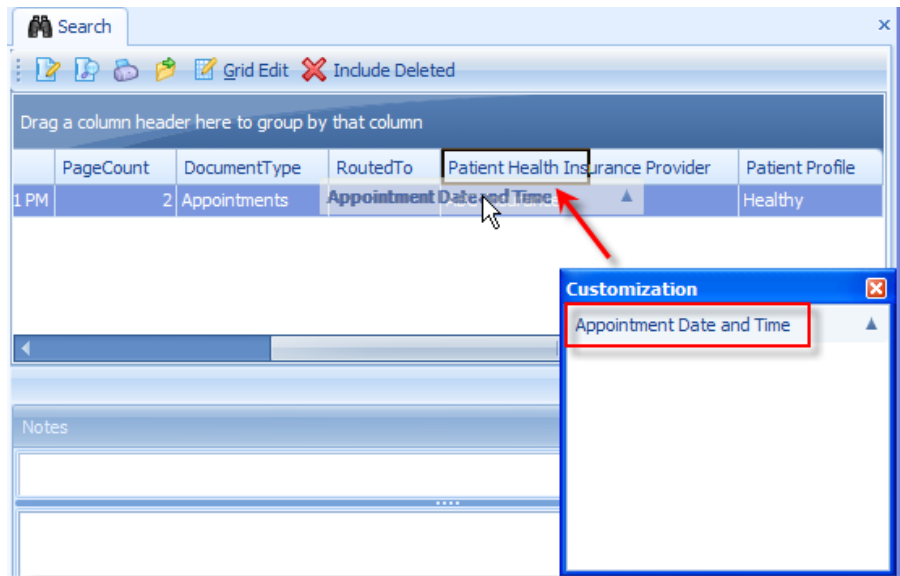



Figure 5.5: Adding a Column

Columns can also be narrowed or widened depending on how much column space you require for any column displayed as demonstrated in **Figure 5.6**. To narrow or widen a column, position the mouse across the line dividing the two columns until you see  and left-click and drag, moving to the left to narrow or to the right to widen the column; the CreateDateTime column is being narrowed in the figure below.

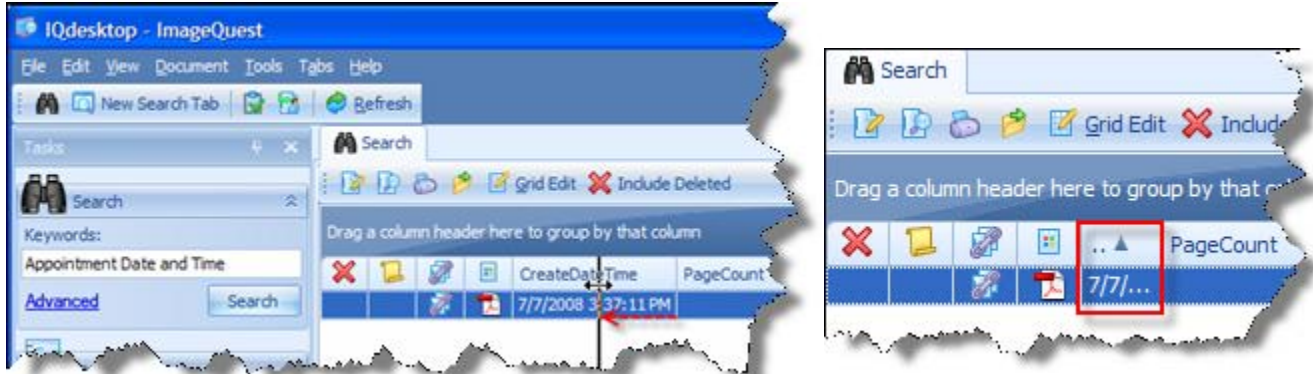


Figure 5.6: Column Customization

Best Fit

The **Best Fit** feature automatically sizes a column to fit the maximum length of data in the column at the time of sizing. To expand a specific column like CreateDateTime to the best fit for viewing, double click between the column headings or right-click on the header row and select **Best Fit** as displayed in **Figure 6.1**. To expand all the columns at once, select **Best Fit (all columns)** from the right-click header.

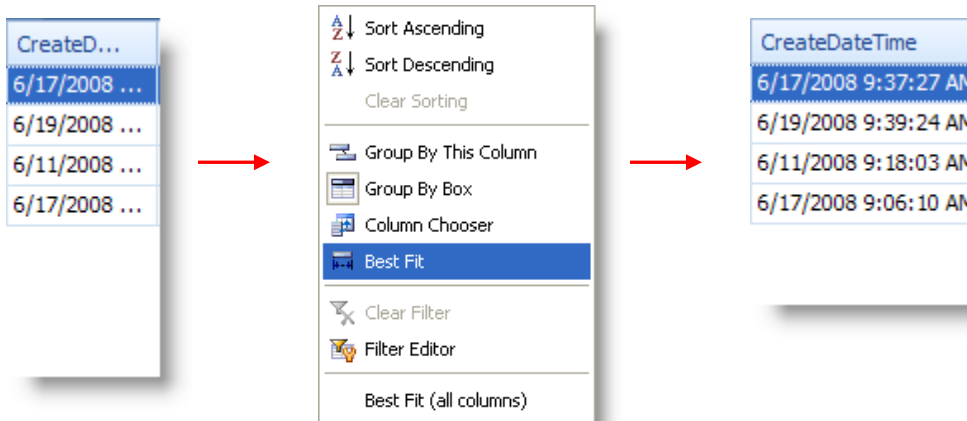


Figure 6.1: Best Fit—One Column

Sorting

Sorting can be performed on any displayed column in ascending or descending order. There are two ways to define the sort option: 1) click on the header as targeted in **Figure 6.2** to display the results in ascending or descending order; 2) right-click on the column header of the column to open the header menu and select “Sort Ascending” or “Sort Descending”. The data in the grid will then be sorted accordingly once you click it. To clear any sorting selection, right-click on the column header and select **Clear Sorting**.

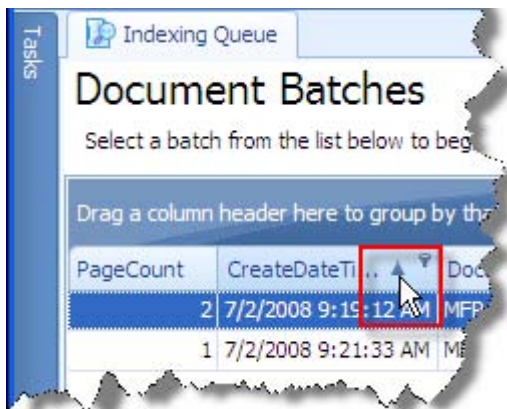


Figure 6.2: Sort

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

Grouping

IQdesktop allows for the grouping of one or more columns which allows for a different view of the grid. It also shows a row count associated with each attribute value. There are two ways to group columns: 1) right-click on the column header intended for grouping; this will open the header menu as displayed in **Figure 6.3**. Select **Group By This Column** which moves the column to the **Group By Box** above; or, 2) click and drag a column header to the **Group By Box**. Repeat either grouping method as needed to group by multiple columns.

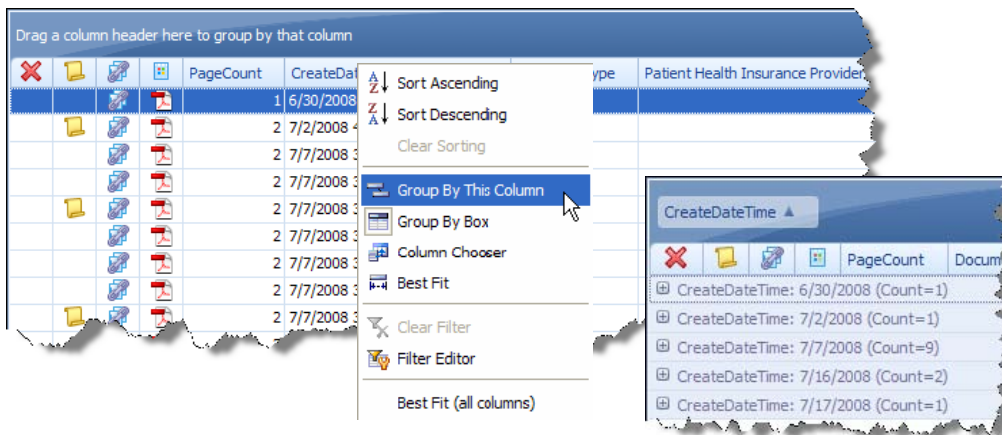


Figure 6.3: Grouping

To ungroup a column, right-click on the column in the **Group By Box** and select the **Ungroup** option, or click and drag the column back to the column header as demonstrated in **Figure 6.4**.

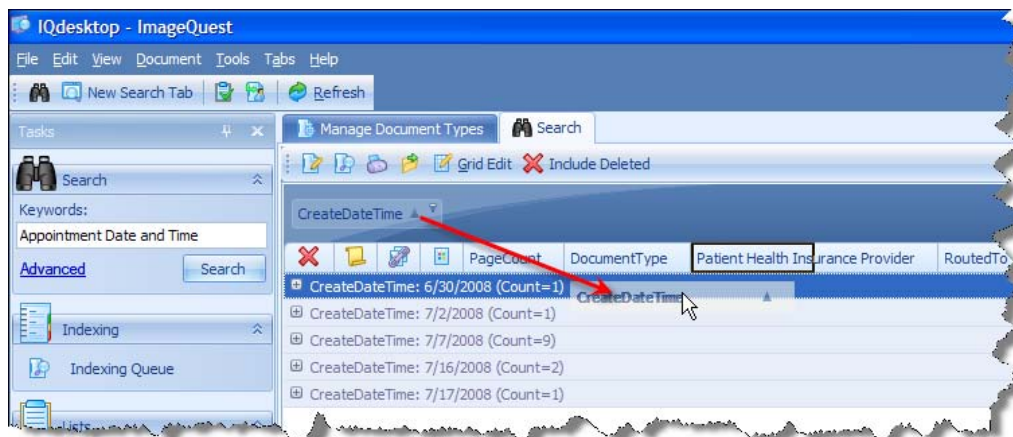


Figure 6.4: Ungroup

Note: To clear the contents of the Group By Box, right-click anywhere in the box and select Clear Grouping.
Note: The grid may be fully expanded or fully collapsed (Figure 6.4) by right-clicking anywhere in the Group By Box and selecting the appropriate menu item.

Filters

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

To apply a filter to a column, left-click on the drop-down menu arrow on the right-hand side of a column header. As shown in **Figure 6.5**, the drop-down menu will list all of the values currently in the column for convenient selection as a filter. Once a value is selected, the drop-down menu will close and the display grid will show the rows of data that matched the selected value.

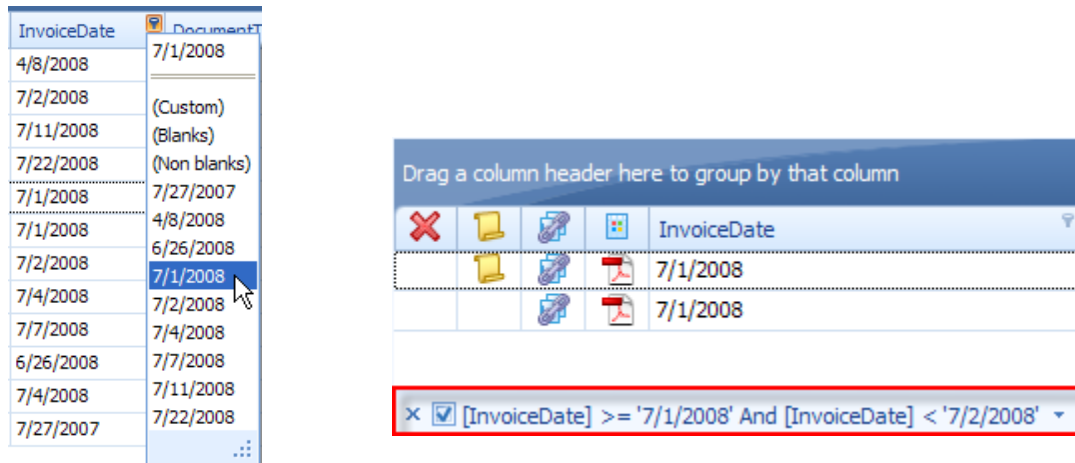



Figure 6.5: Applying a Filter

The bottom of the grid now displays the applied filter, '7/1/2008' to the column, "InvoiceDate," as shown above in **Figure 6.5**. To cancel the filter, simply click on the  to the left of the filter.

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

More complex or versatile filters may be created by selecting the "Custom" option from the drop-down list. The "Custom" option allows the user to create conditions bound by an "And/Or" clause. When "Custom" is selected, the "Custom AutoFilter" window appears as highlighted in **Figure 6.6** on the following page. For example, the user selects "is greater than or equal to" and enters a value of 500 to locate documents that contain invoice amounts equal to or greater than \$500, yet there are several criteria that can be utilized as you view the entire drop-down menu (i.e. "equals," "does not equal," "is greater than," "is greater than or equal to," "is less than," "is less than or equal to," "blanks," "non blanks," "like" and "not like"). Click "OK" to apply the filter.

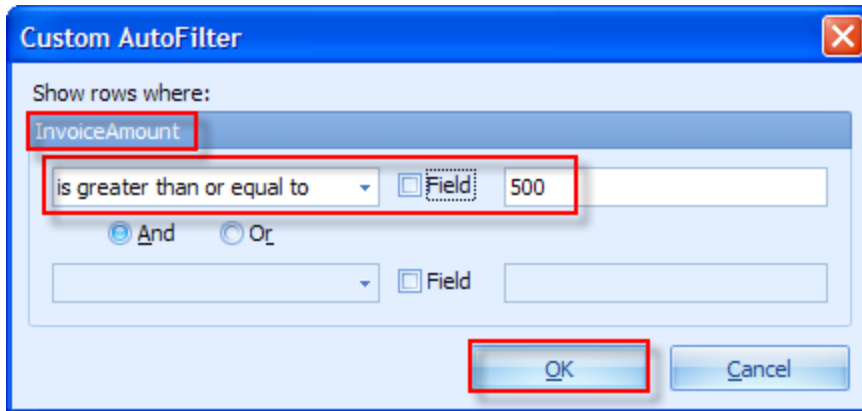


Figure 6.6: Custom AutoFilter

Save Layout

Once the grid has been customized to your liking (i.e. column sort order, column removal, column order), you have the option to save the grid layout. To save the grid layout, press **Ctrl+L** or go to the “View” menu as demonstrated in **Figure 6.7** and select, **Grid Layout > Save Layout**; the options to **Restore** and **Forget Saved Layout** are not available if there is no saved layout. Once a layout has been saved, you may select **Forget Saved Layout** to delete it and restore the default look.

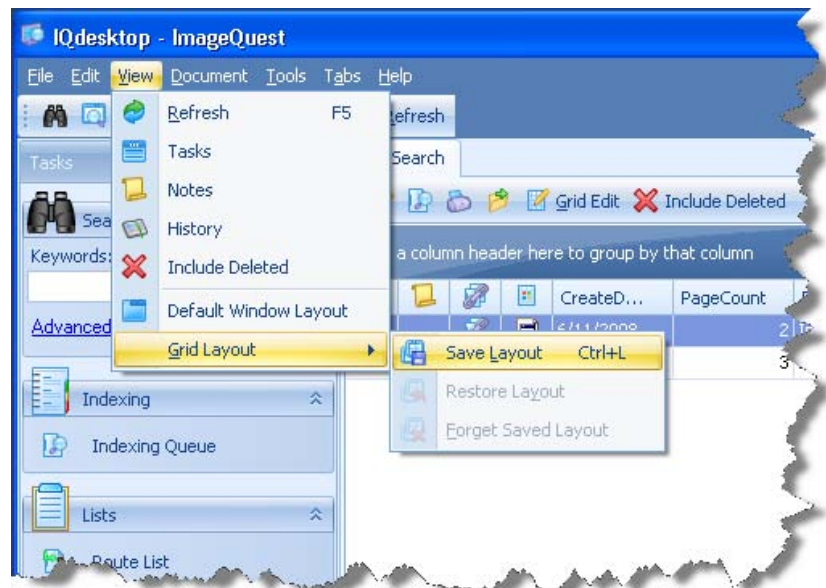


Figure 6.7: Grid Layout


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

Note: The “Indexing Queue” grid layout is saved automatically every time the user exits the queue.

Updating Documents

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

Notes

The **Notes** panel is beneficial to users because it allows for adding comments to a document as illustrated in **Figure 7.1** below. For example, the outlined document in this figure has a note. When a note is entered for a specific document, the  icon appears in the Note column next to that document. The **Notes** and **History** tabs are located at the bottom of the screen; click the **Notes** tab to view the comments for the highlighted document. This note, 'Additional services rendered—outstanding balance updated' has been entered on 7/18/2008 at 2:26:39 PM by the User "dogden". The **Notes** panel will update automatically as other documents are selected. If the **Notes** panel has been removed from the view, it may be returned by selecting **Notes** from the **View** menu.

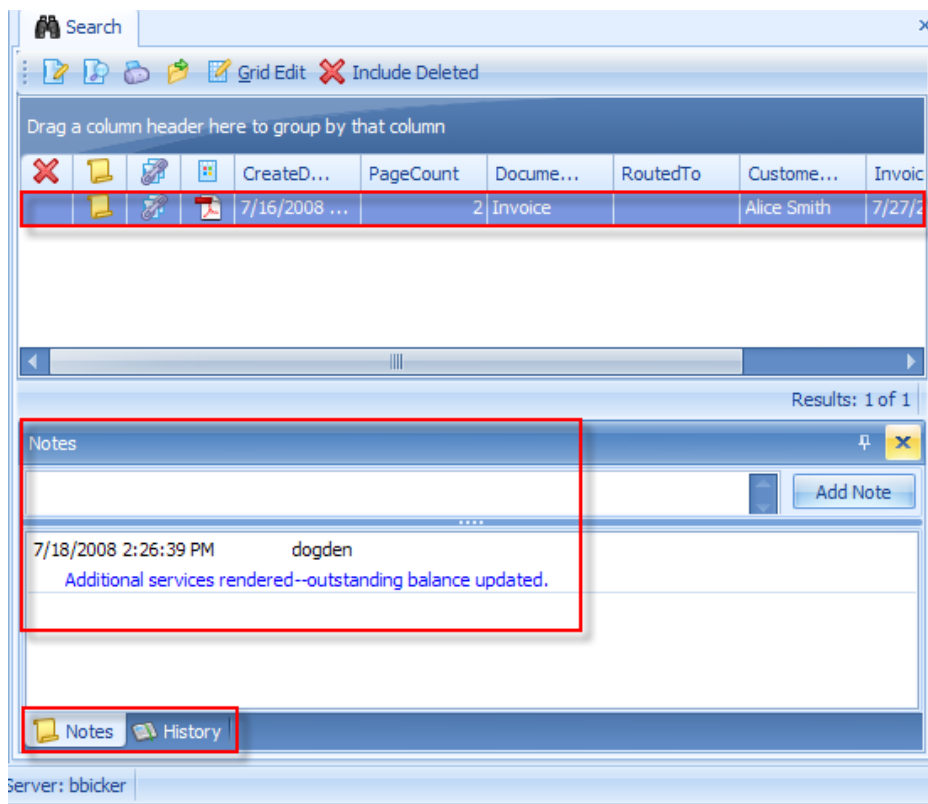


Figure 7.1: Notes Panel

Note: Once a note is entered, it cannot be updated or changed.

Note: Notes cannot be searched.

Note: The "Update Document" permission is required for individual users to add notes.

Editing Document Attributes

To edit a document, right-click on the highlighted document and select **Edit (Ctrl+Shift+E)** from the drop-down menu as demonstrated in **Figure 7.2**. You may also use the toolbar icon or the Document menu.

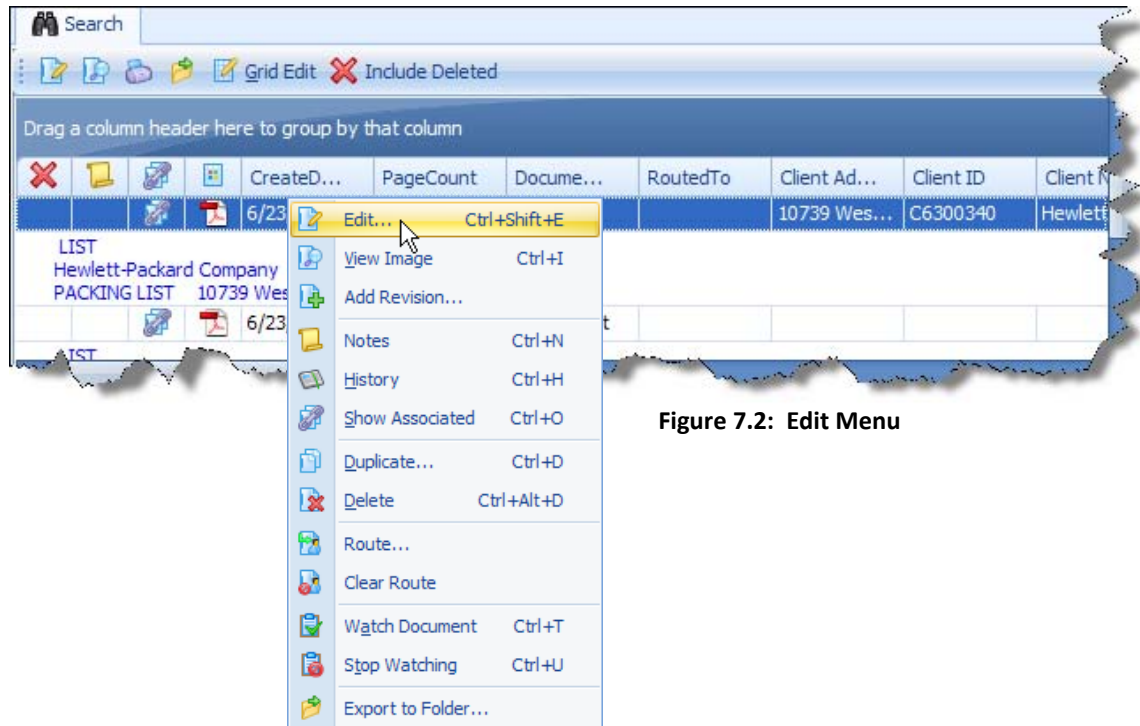


Figure 7.2: Edit Menu

The “Edit Document” window appears so that changes may be made to the document as illustrated in **Figure 7.3**. The Document Type for editing in this sample is “Receipts”. Once the document is updated, click “Save” to save the changes; if the user decides that no changes are necessary, click “Cancel”.

The screenshot shows the 'Edit Document' dialog box. It has a title bar with 'Edit Document' and standard window controls. The 'Document Type' is set to 'Receipts'. Below this are several input fields: 'Client Address' (10739 West Little York, Suite 100, Houston, TX 77041 USA), 'Client ID' (C6300340), 'Client Name' (Hewlett-Packard Company), 'Client Phone Number' (0), 'Date' (5/16/2008), 'Company' (Hewlett-Packard Company), and 'Remaining Balance'. At the bottom are 'Save' and 'Cancel' buttons.

Figure 7.3: Edit Document

Selecting a new Document Type in the drop-down menu will refresh the screen to display the attributes applicable to the selected Document Type. The window in **Figure 7.4** appears to confirm the Document Type change. Click “Yes” to proceed.

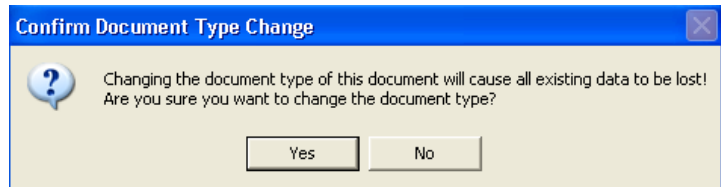


Figure 7.4: Confirm Document Type Change

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

After changes have been saved, the user will be prompted to “Enter a Note” explaining the reason for the changes. Enter any applicable notes as noted in **Figure 7.5** and click “OK,” or click “Cancel” to save changes without adding a note.

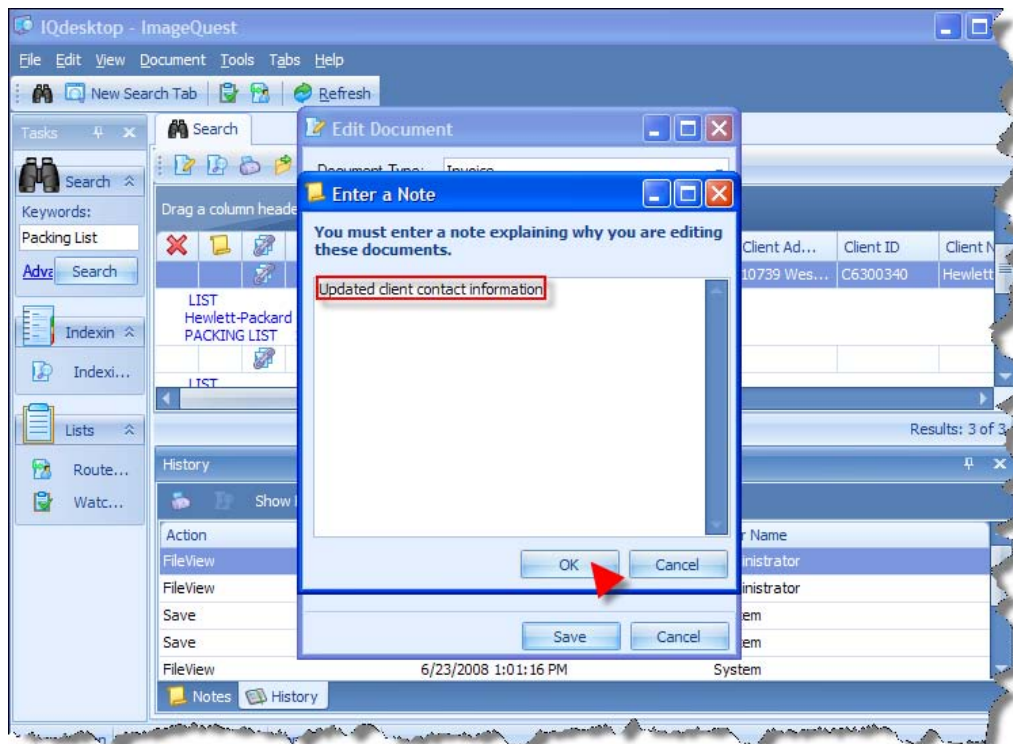


Figure 7.5: Enter a Note

Note: The “Update Document” permission is required for individual users to update documents.

Editing Multiple Documents

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

When more than one document is selected for editing, only the attributes that are applicable to both documents will appear. Check the box next to the attribute you wish to edit, update the index information and then click "Update" when finished. This will update all the records with the new information. See the sample in **Figure 7.6**.

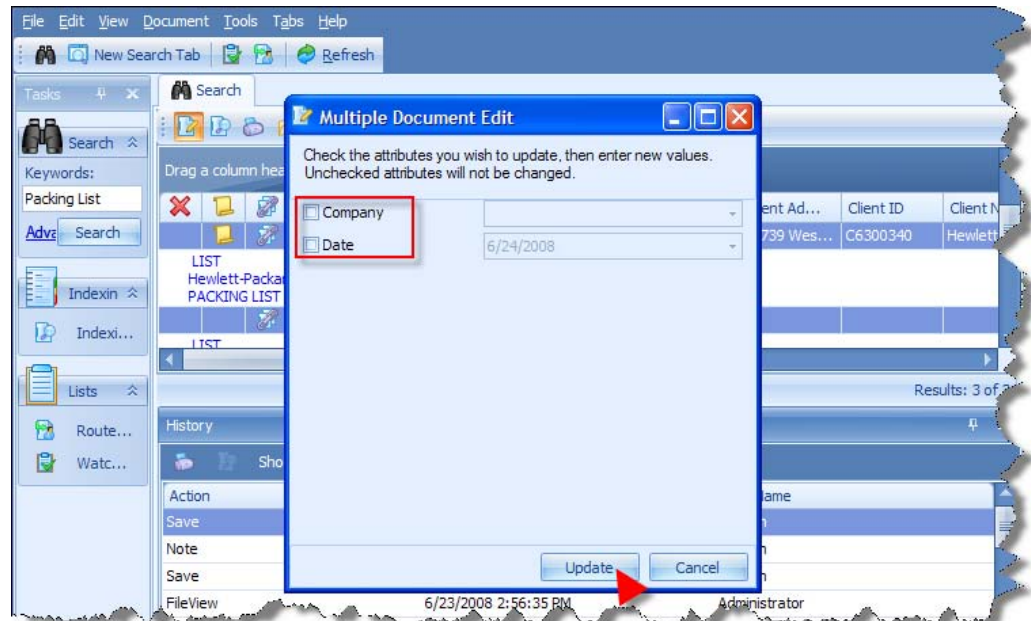



Figure 7.6: Multiple Document Edit

Note: The Document Type field cannot be changed when using "Multiple Document Edit" and must be edited individually.

Grid Edit

The grid displaying the indexed documents may also be edited directly using  **Grid Edit (Ctrl+E)** as illustrated in **Figure 7.7** on the following page. Toggling the Grid Edit button makes the search grid act much like a spreadsheet program such as Microsoft Excel in that you can type directly into the fields. **Use caution while Grid Edit is enabled as changes are saved automatically once you click off of the document row.** Fields highlighted in gray are either system fields or attributes that are not associated with the document type; these fields cannot be edited.

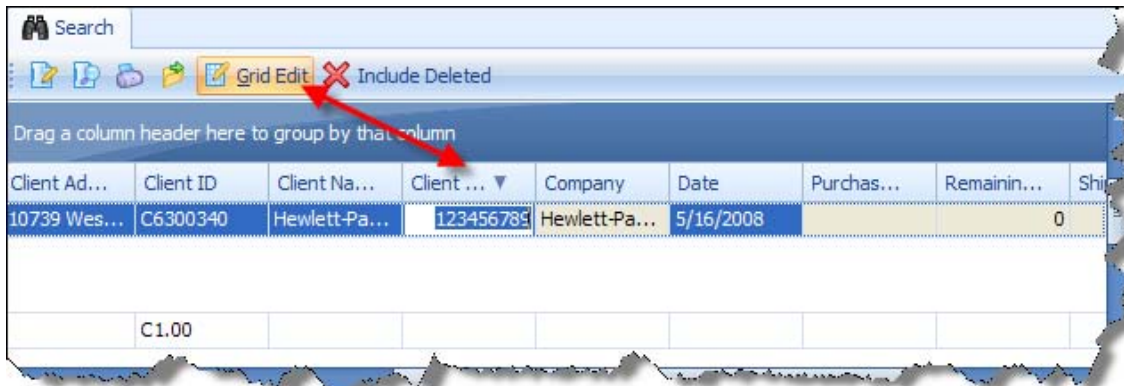


Figure 7.7: Grid Edit

Deleting Documents

To delete a document, right-click on a record and select **Delete**, or highlight one or more records and select **Delete** from the “Document” menu as demonstrated in **Figure 7.8**.

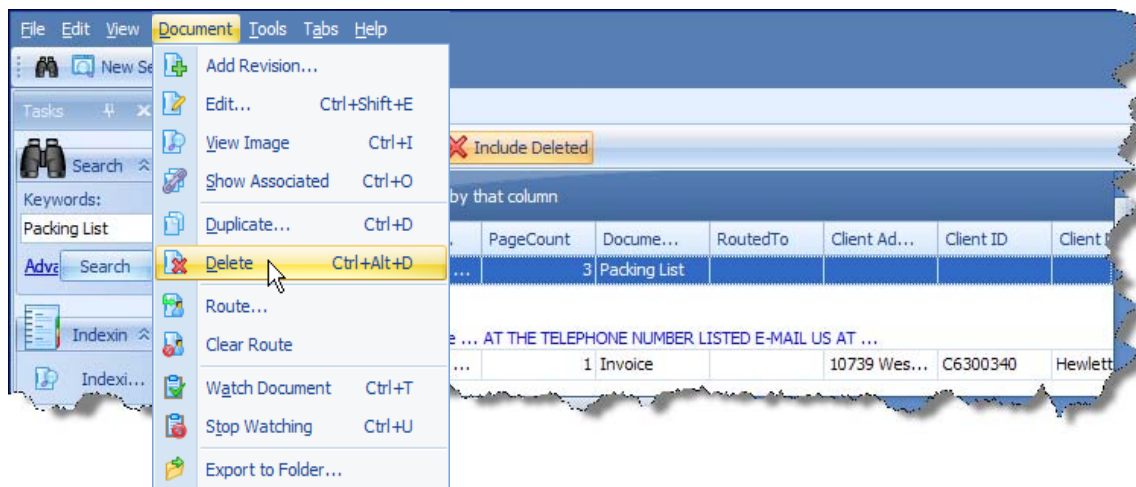


Figure 7.8: Delete a Record

The “Confirm Delete” window appears to ensure that the user desires to delete the selected document as shown in **Figure 7.9**; click “Yes” to proceed.

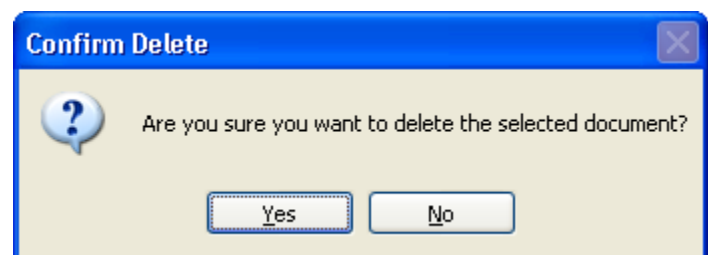


Figure 7.9: Confirm Delete

The user will then be prompted to enter a note explaining why the document was deleted as noted in **Figure 7.10**. For example, this document was deleted because it was a duplicate document in the grid. Click "OK" upon completion of the note.

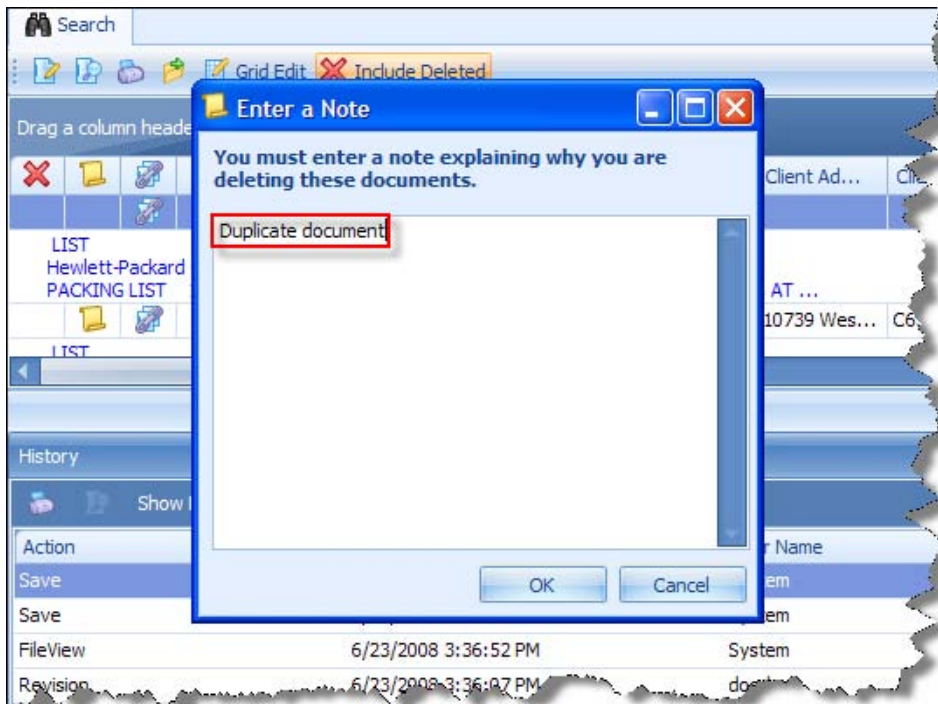




Figure 7.10: Enter a Note

Records deleted from IQdesktop are never actually deleted but are flagged as such, much like the Windows recycling bin. Toggling the  button allows a user to see or hide the deleted documents if he or she has permissions to do so. Deleted records have a red  at the beginning of the record as shown in **Figure 7.11**.

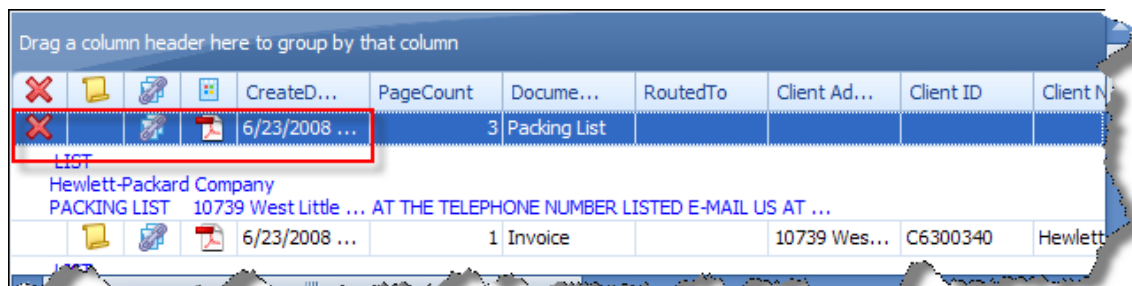


Figure 7.11: Deleted Record

Note: Users must have permissions to delete documents and view deleted documents. See the *IQAdministrator's Guide* for more information.

Revising Documents

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

In a “Search” tab, right-click on the highlighted document and select **Add Revision**, or select it from the “Document” menu as illustrated in **Figure 7.15**.

Note: See the Microsoft Office Connector, pg. 64, for information on revising Office type documents (.doc, .docx, .xls, .xlsx and .wpd).

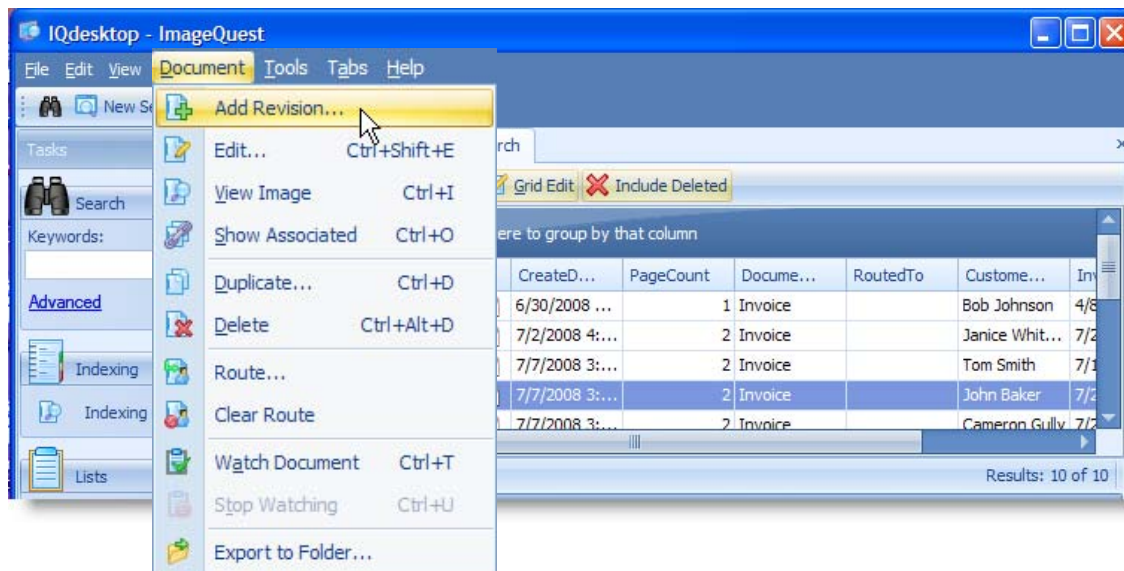


Figure 7.15: Add Revision

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

To view previous document revisions, right-click on any of the “Revision” actions in the **History** panel and click **View Revision** as shown in **Figure 7.16** on the following page. To see the revision numbers, click the “Show Preview” button.

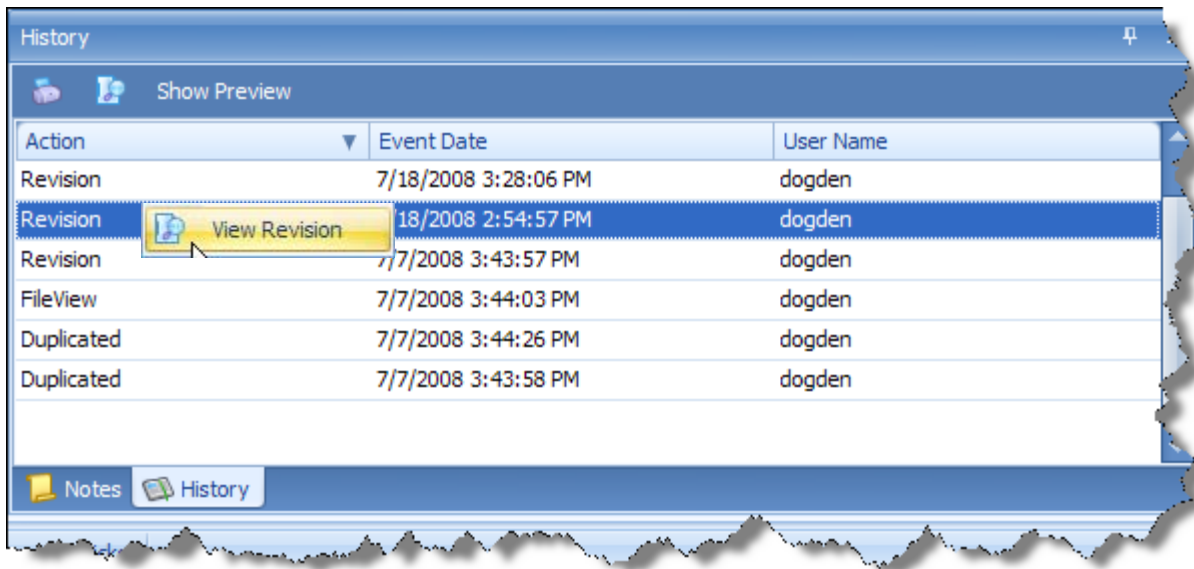


Figure 7.16: View Revision

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

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

Note: The "Update Document" permission is required for revising documents.

Document History

Anything that happens to a document, be it user related or system related, gets recorded into the **History** panel making it easy for someone to see exactly who did what and when. By default, the **History** panel is located at the bottom of the screen underneath the grid. Highlight a document and click on the **History** tab at the bottom of the screen to see the **History** panel. If the **History** panel was previously closed, selecting **History** from the "Document" menu will bring it back as shown in **Figure 7.12**.



Figure 7.12: Document History

The **History** panel shows three columns, “Action,” “Event Date” and “User Name” as seen in **Figure 7.13**. These columns can be sorted just like the main search grid.

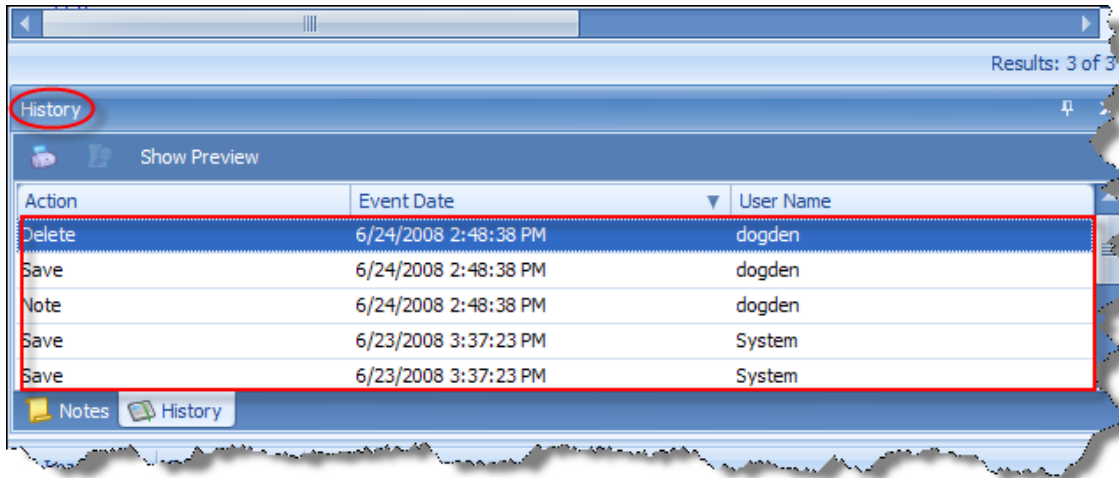


Figure 7.13: History of a Document

See **Figure 7.14** of the following page highlighting the **History** Toolbar features—“Print,” “View Revision” and “Show Preview”. The user may print the history of any document, view its revision (if any) or expand the action details to see more information.

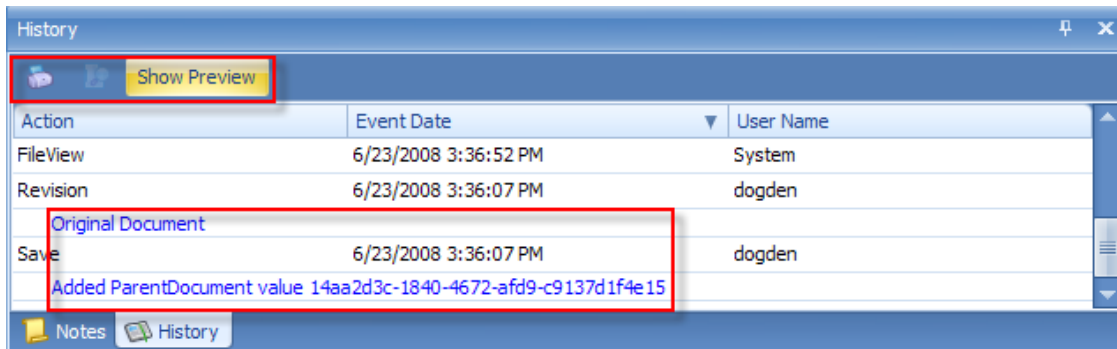


Figure 7.14: History Toolbar

Additional Features in IQdesktop

IQdesktop allows users to manage the electronic filing system interface with the additional menu features in the "Toolbar;" from left to right, the icons to these features represent the following functions: **Search**, **New Search Tab**, **Watch List**, **Routing List** and **Refresh**.

See **Table 2** below to learn the feature and function of each additional feature.





Additional Features	Feature Function
 Search (Ctrl+F)	Allows a user to search for documents
	Allows a user to open a new tab to perform additional searches without clearing the contents of the current tab
 Watch List (Ctrl+W)	Allows a user to track specific documents as they are routed and updated by other IQ users, similar to a favorites list or bookmarks.
 Route List (Ctrl+R)	Allows a user to view documents that have been routed for review.
 (F5)	Allows the user to update the current tab with any new documents or search results.
 (CTRL+H)	Activates the History panel
 (CTRL+N)	Activates the Notes panel

Table 2: Additional Features and their Functions

New Search Tab

The **New Search Tab** is beneficial to the user if they are managing two or more searches concurrently. A user may open a **New Search Tab** by clicking the “New Search Tab” button in the toolbar as highlighted in **Figure 8.1**.

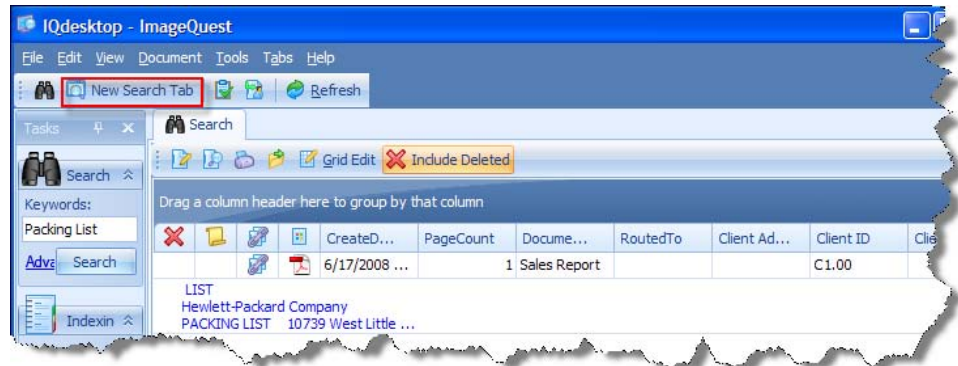


Figure 8.1: New Search Tab Icon

Once the **New Search Tab** is selected, a “Search” window appears to initiate a new search via “Custom Search” or “Saved Queries” as illustrated in **Figure 8.2**; in this figure, for example, the new search is initiated via the “Custom Search” for a Sales Report with the client name, ABC Company. Click “Search”.

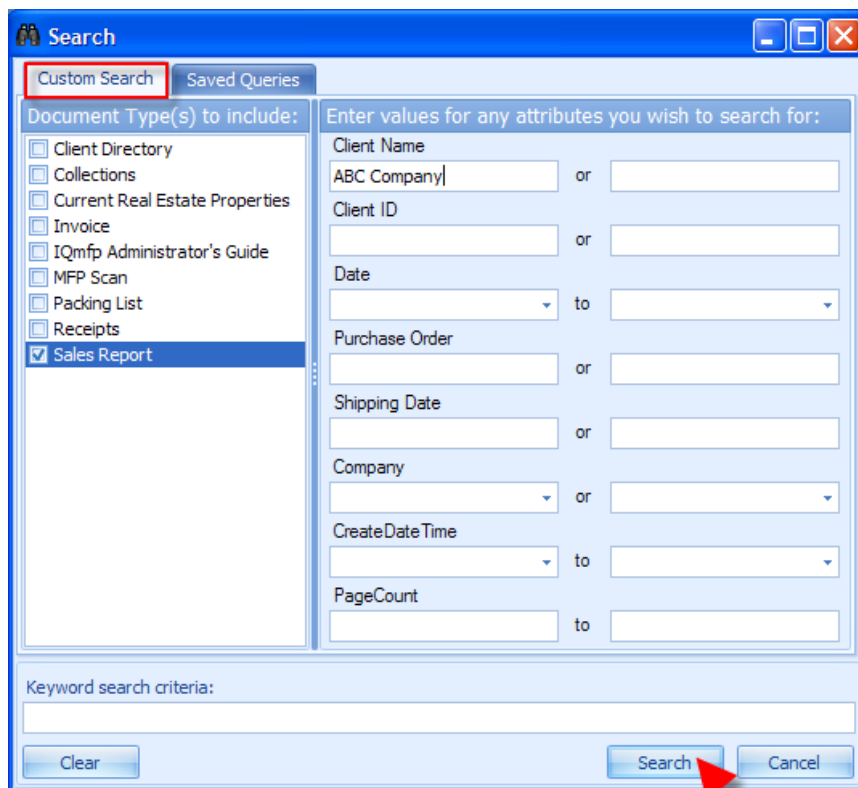


Figure 8.2: New Search Tab—Custom Search

The new search results are displayed in a new search tab as illustrated in **Figure 8.3**. The user may switch between the tabs to view the different search results. Currently, an unlimited number of search tabs may be open. To close a search tab, click the **x** button to the far right as highlighted below.

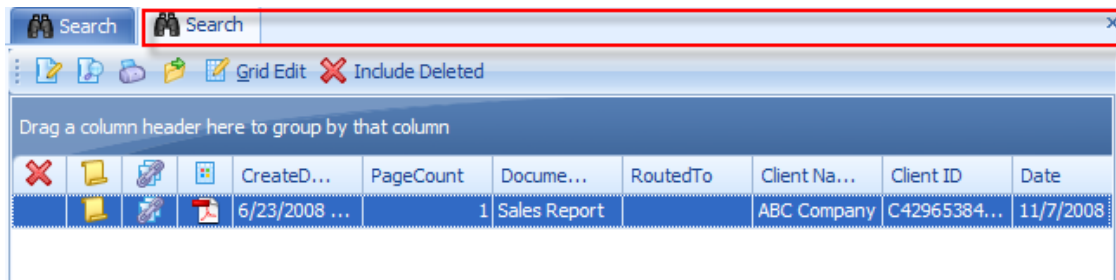


Figure 8.3: New Search Tab

Route List

The **Route List** shows a list of documents that were sent from other IQ users that may require some kind of attention. A user can route a document to a single user or to multiple users via a Role. If a document is routed to a Role, all members in that role will see the document in their **Route List**.

To **Route** one or more records, highlight the record(s) and select **Route** from the right-click menu or from the "Document" menu as demonstrated in **Figure 8.4**.

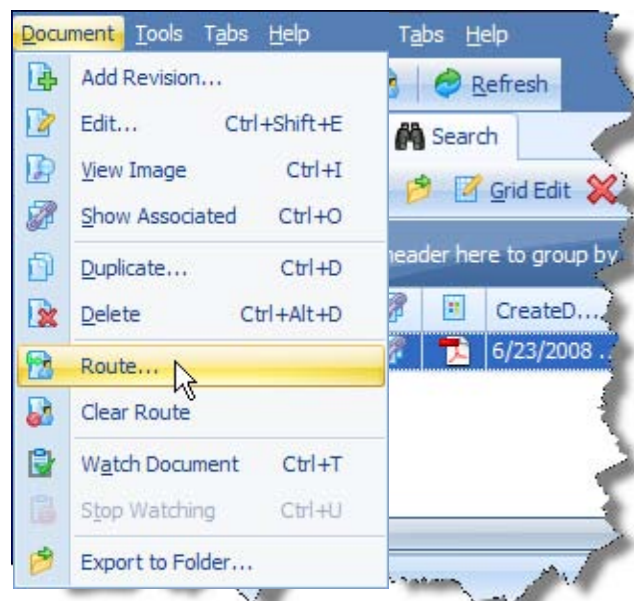


Figure 8.4: Document Menu—Route

The “Document Routing” window prompts the user to select the User or Role to route the document to as displayed in **Figure 8.5** below. Check the “Add documents to my Watch List” checkbox if you wish to add the documents to your **Watch List** as well. Click “OK”. *See the next section for more information on managing the Watch List.*

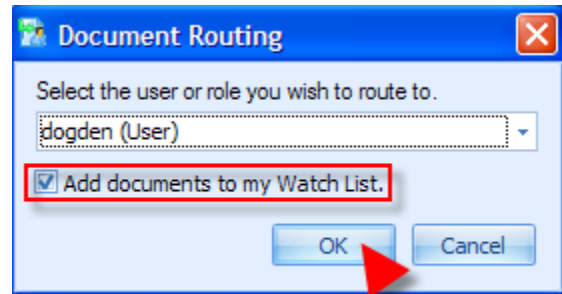


Figure 8.5: Document Routing

See **Figure 8.6**. Once a document is routed to a User or Role, the system attribute, “RoutedTo,” will be populated, indicating which User or Role the document was routed to.

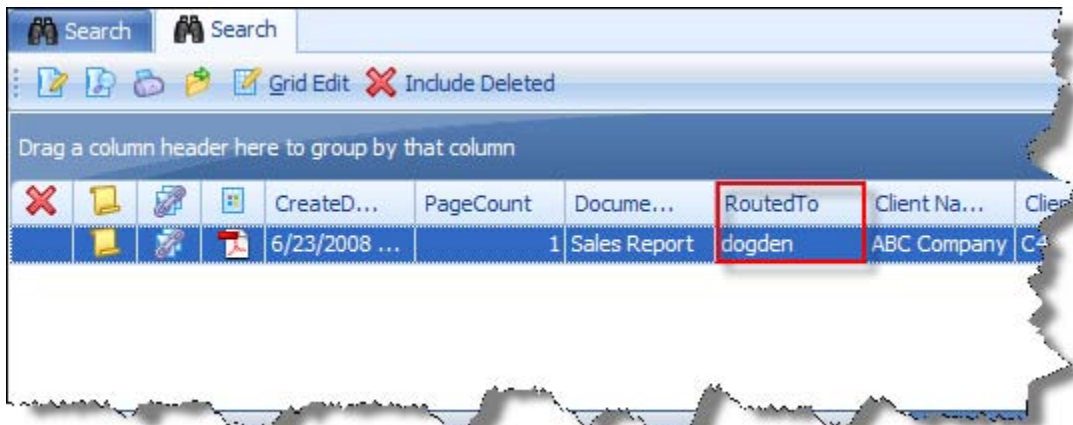


Figure 8.6: Document RoutedTo Field

To view the **Route List**, click the link in the “Tasks” pane or select the “Routing List” link from the “Tools” menu as demonstrated in **Figure 8.7** on the following page.

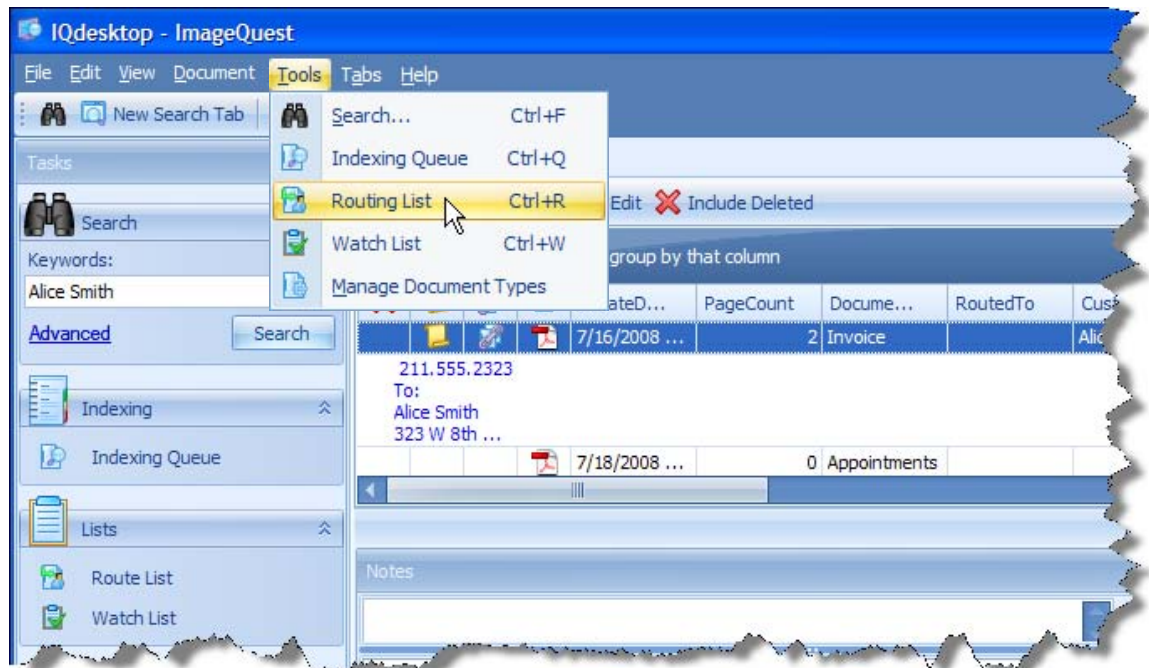


Figure 8.7: Routing List

The **Route List** shows up as its own tab and lists all documents that have been routed to the user logged into IQdesktop as seen below in **Figure 8.8**.

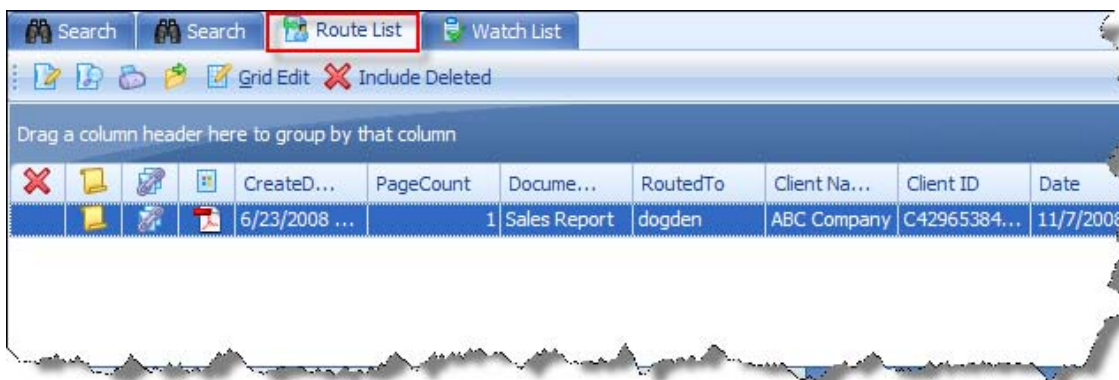


Figure 8.8: Route List

To remove routing from a document, highlight the record and select **Clear Route** from the "Document" menu or the right-click menu. As soon as the user clicks **Clear Route**, the "RoutedTo" attribute will empty. If the route is cleared from the "Route List", the document will disappear once the tab is refreshed.

Note: Documents may also be routed from the "Indexing Queue" while indexing documents.

Note: The "Update Document" permission is required for routing documents.

Watch List

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

The **“Watch List”** may be accessed from the **“Tasks”** pane or from the **“Tools”** menu as demonstrated in **Figure 8.9**.

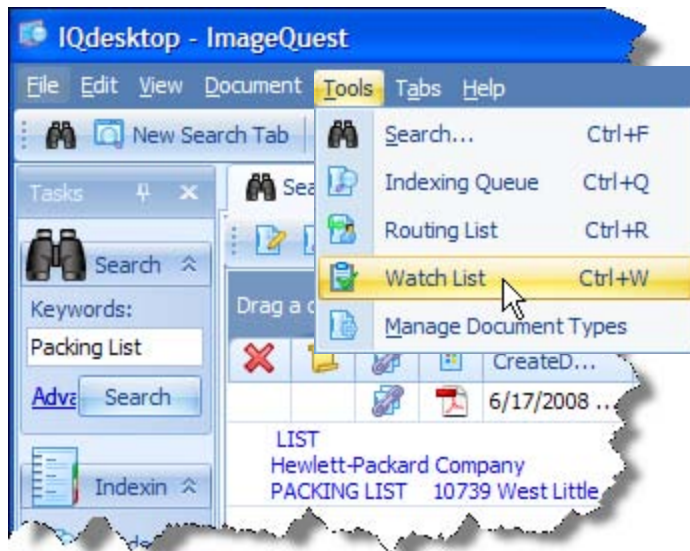


Figure 8.9: Watch List

The **Watch List** opens in its own tab as shown below in **Figure 8.9** and is specific to each user.

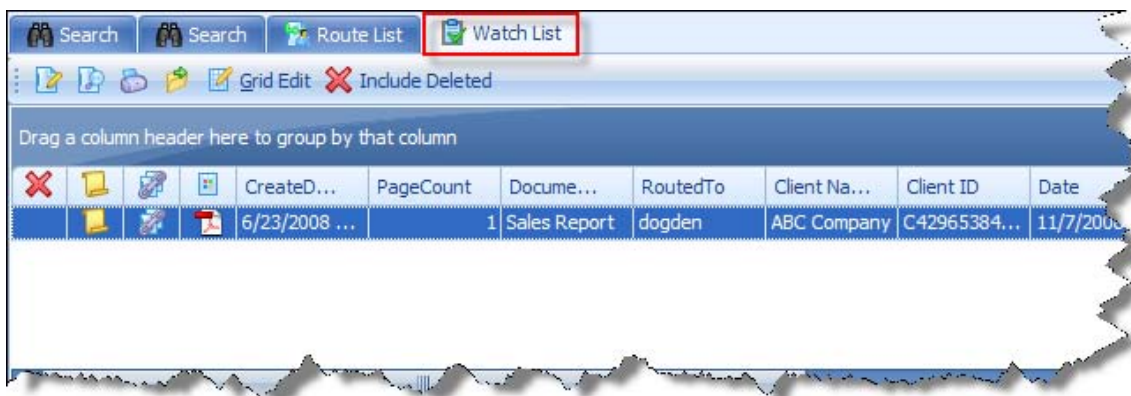


Figure 8.9: Watch List

To stop watching a document, select **Stop Watching (Ctrl+U)** from the **“Document”** menu or from the right-click menu.

Export to Folder

The **Export to Folder** feature allows documents selected in IQdesktop to be exported to a folder on the user's PC; an HTML page with searchable metadata is also created. The user can then manually burn these files to CD, etc. This creates portability for the set of documents selected for reference outside of IQdesktop.

Only the documents selected in the current grid will be flagged for export. Hold down the CTRL key while clicking individual documents to select individual documents or press CTRL+A to highlight all of the documents in the grid. Once all the documents have been selected, go to the "Document" menu and select "**Export to Folder**" to export the selected documents to a folder as demonstrated in **Figure 8.10**.

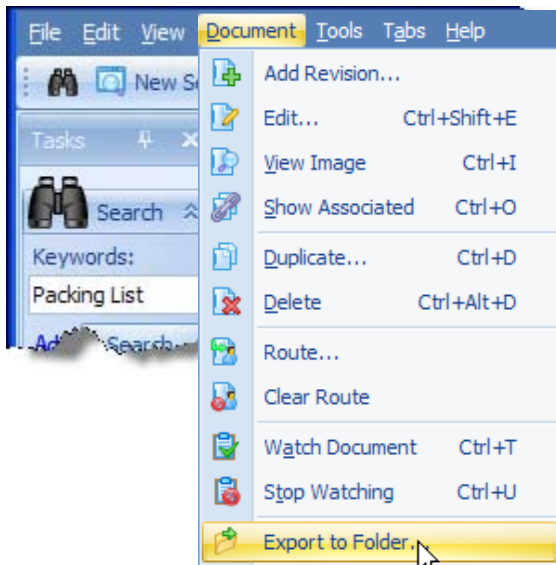


Figure 8.10: Export to Folder

The "Browse For Folder" window appears allowing the user to either select an existing location, or to create a new folder. In **Figure 8.11**, the user had decided to send the documents to the "C:\My Exported Files" folder. Click "OK".

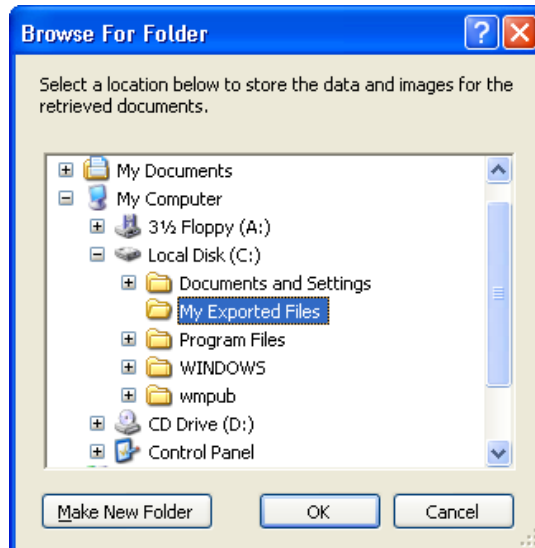


Figure 8.11: Browse For Folder

The selected documents have now been exported to the “C: \My Exported Files” folder as noted in **Figure 8.12**. Click “Yes” to view the exported information.

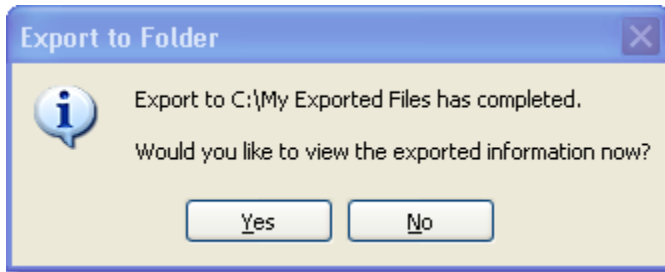


Figure 8.12: Export to Folder Completed

Figure 8.13 below displays the exported documents in a searchable html file (default.hta). Click the “View” hyperlink to view the documents in their native viewer.

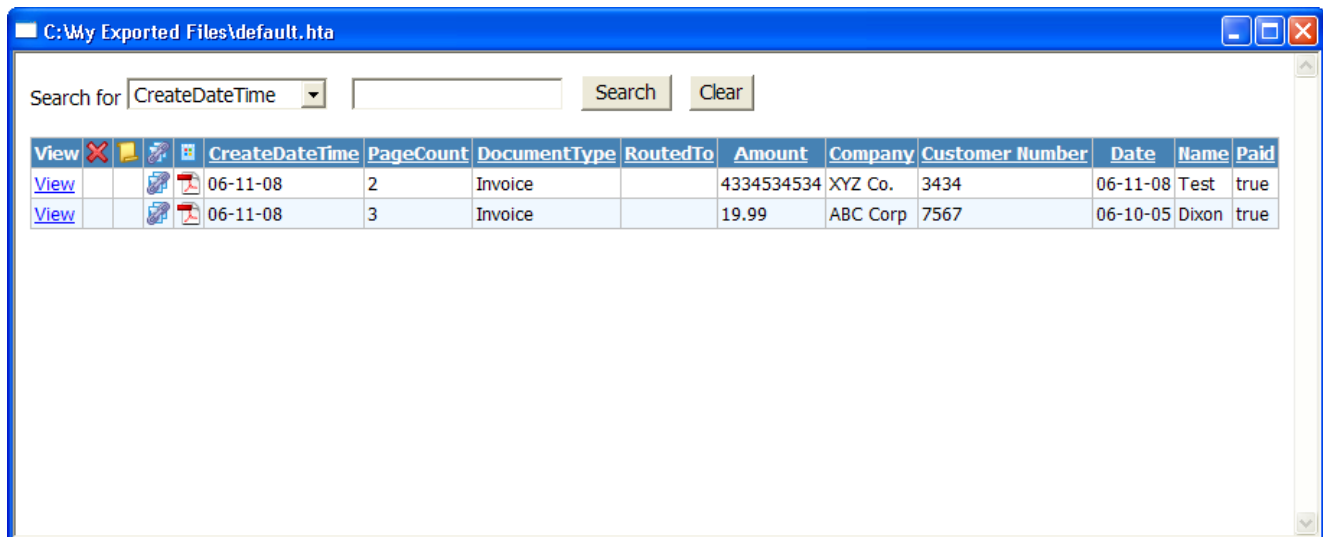


Figure 8.13: Exported Documents

Note: Searches performed from the default.hta file are case sensitive.

Duplicate

To create a duplicate copy of a record, highlight the record and select **Duplicate (Ctrl+D)** from the right-click menu or from the "Document" menu as illustrated in **Figure 8.14**.

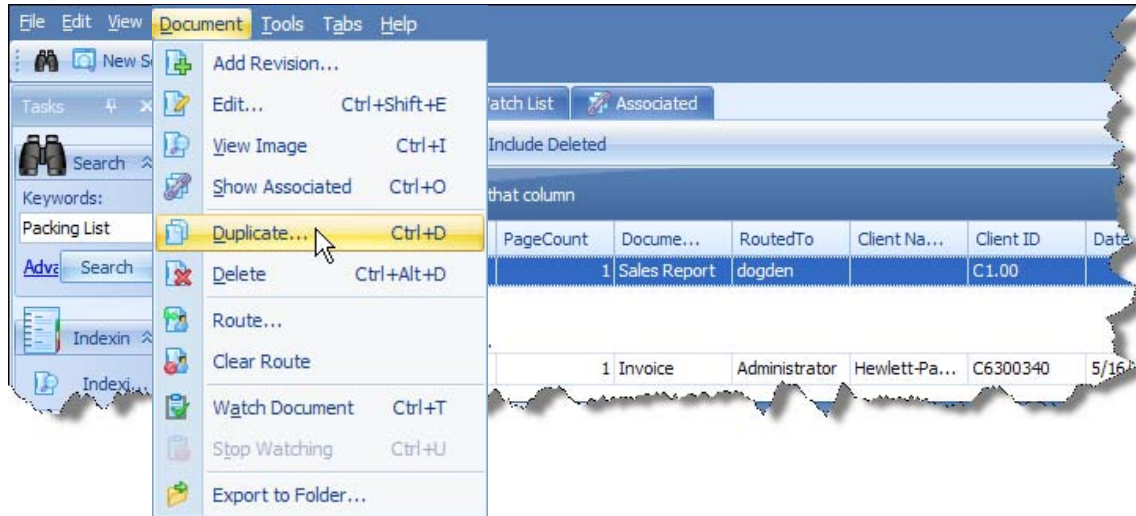


Figure 8.14: Duplicate

The **Duplicate Document** window will open as shown in **Figure 8.15**. The duplicate record Document Type and attributes may be edited before clicking "Save".

 A screenshot of the 'Duplicate Document' dialog box. It contains several fields for editing the duplicate record: 'Document Type' (set to 'Sales Report'), 'Client Name' (set to 'HP'), 'Client ID' (set to 'C1.00'), 'Date' (set to '6/25/2008'), 'Purchase Order' (empty), 'Shipping Date' (set to '7/15/2008'), and 'Company' (empty). At the bottom right, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

Figure 8.15: Duplicate Document

The user will then be prompted to enter a note explaining why the document is being duplicated. The user may either enter a note or click the "Cancel" button to save the new document without adding any comments.

Note: Users must have the “Add Document” permission to create duplicate records.

Show Associated

When documents are scanned into the Indexing Queue, they arrive with a document type of “MFP Scan”. After a document batch has been indexed, it may be useful to see the original scanned batch. To show the original MFP Scan document batch, select **Show Associated (Ctrl+O)** from the “Document” menu as displayed in **Figure 8.16**.

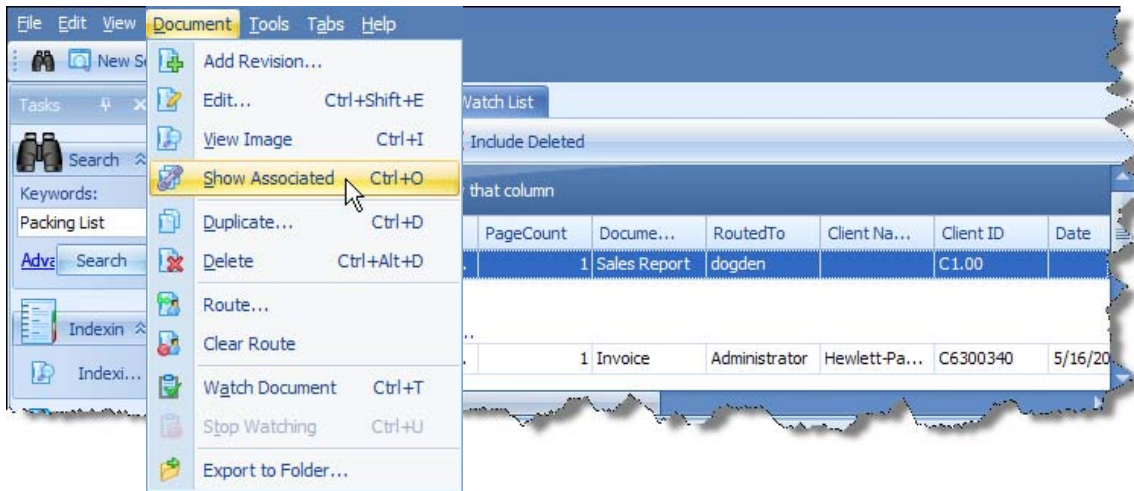



Figure 8.16: Show Associated

All associated documents, if any, will appear in their own tab. Associated documents display the  icon next to them as shown in **Figure 8.17**.

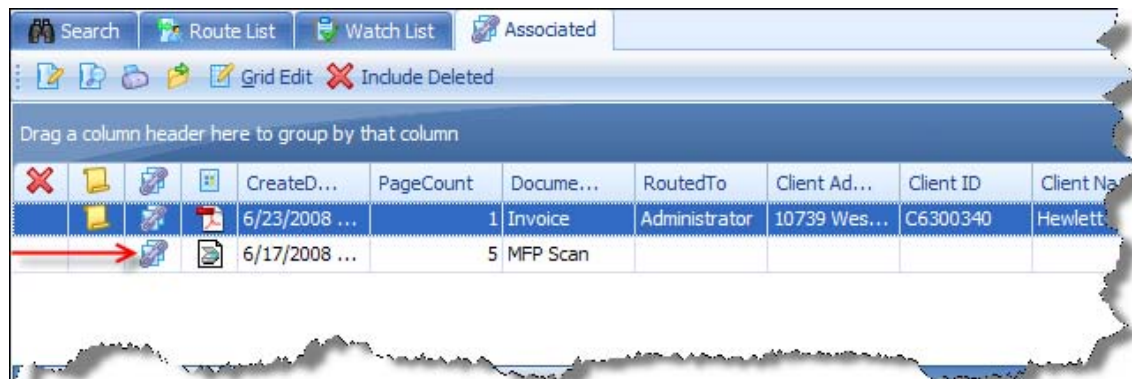


Figure 8.17: Associated Documents

Note: Users must have **Allow** access to the “MFP Scan” document type in order for them to appear as associated documents.

Note: Duplicate records are also linked together by using “Show Associated”.

Managing Document Types

Document Types and Attributes may be added and edited from IQdesktop if the user has **Allow** permissions to "Manage Document Types." This feature is convenient for users and also allows administrators to give certain users access while still restricting them from other administrative functions that require the use of IQadministrator. To Manage Document Types from IQdesktop, select it from the "Tools" menu as shown below in **Figure 9.1**.

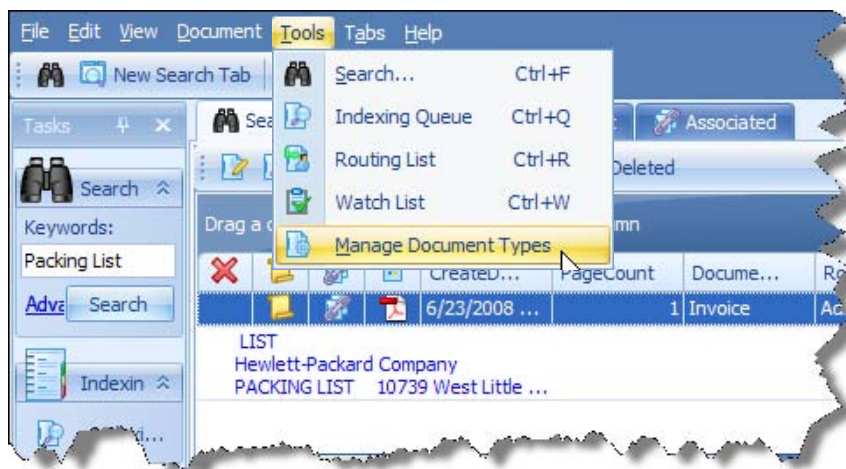


Figure 9.1: Tools—Manage Document Types

Figure 9.2 below highlights the **Manage Document Types** tab which is the same screen that appears in IQadministrator. For more information on **Manage Document Types**, see the *IQmfp Administrator's Guide 10.0*.

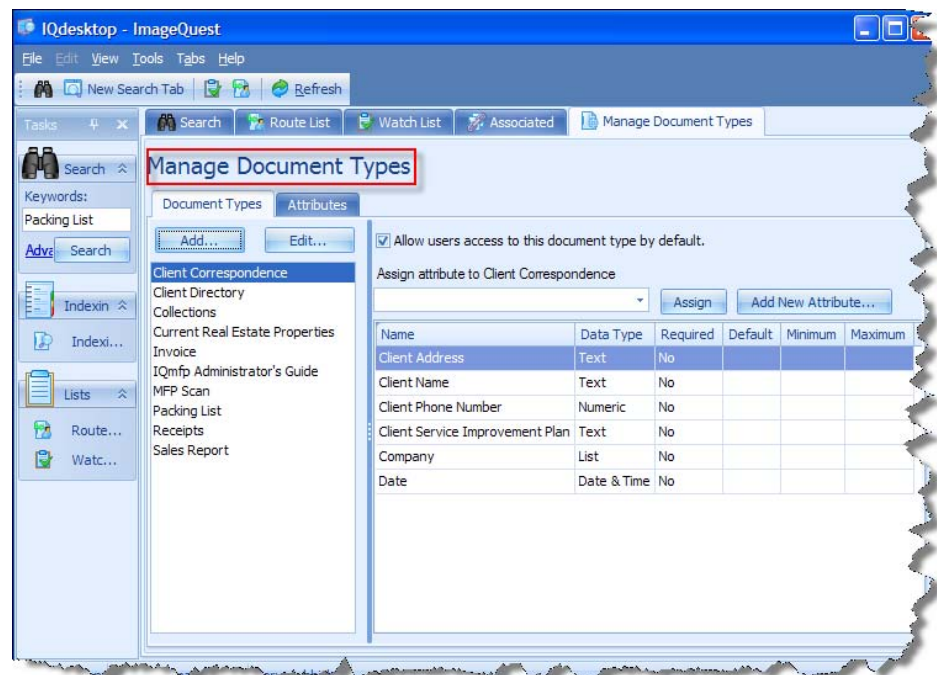


Figure 9.2: Manage Document Types

Additional IQclient Applications

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

- Microsoft Windows Explorer Connector
- Microsoft Office Connector
- Corel WordPerfect Connector
- IQscan

Installation instructions for each connector can be found in the *IQmfp Software Installation Guide 10.0*.

Microsoft Windows Explorer Connector

Many users have electronic files that need to be stored in IQmfp. For this purpose, IQmfp can use Windows functionality to initiate processing electronic files. To do this, locate and highlight the file or files intended for filing in IQmfp. Right-click on the highlighted files and select **Send To > IQdesktop** as illustrated in **Figure 10.1** below.

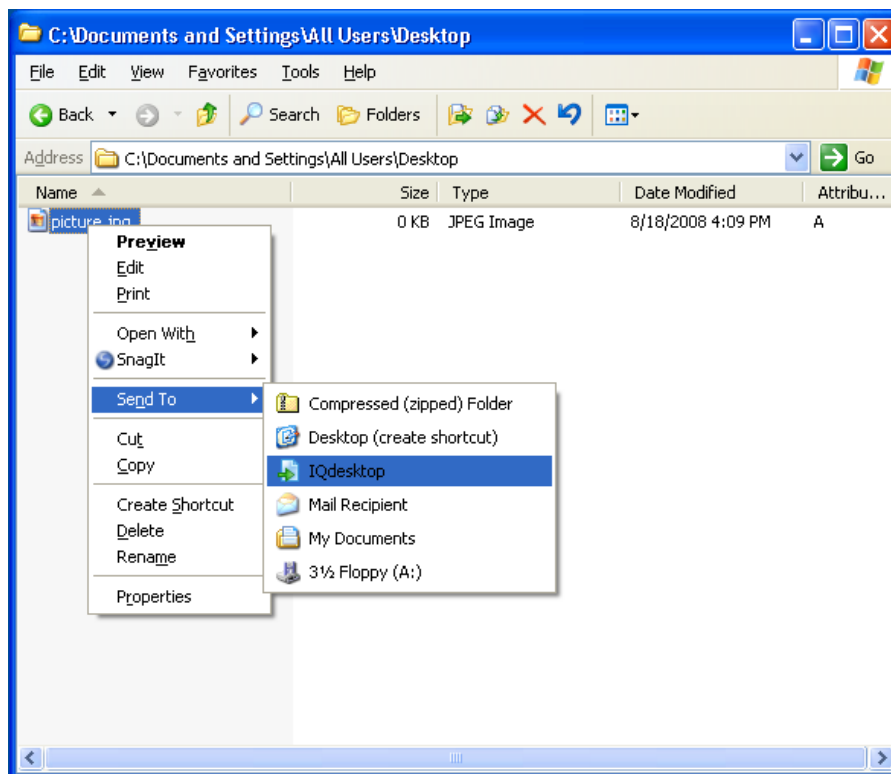


Figure 10.1: Send To IQdesktop

The “Send to ImageQuest” window appears allowing the user to select a Document Type from the drop-down menu and assign attributes as shown in **Figure 10.2** on the following page. Click “OK” to submit the file to IQ.

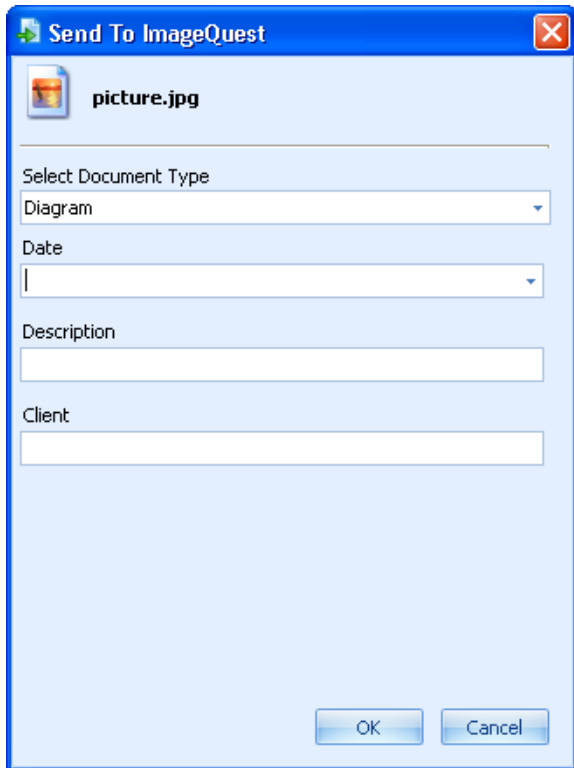


Figure 10.2: Send To ImageQuest

The "ImageQuest Connector for Windows Explorer" window in **Figure 10.3** prompts the user that the selected number of files has been successfully saved to ImageQuest. Click "OK".



Figure 10.3: Confirmation Message

Note: Users must have the "Add Document" permission in order to use the Microsoft Window Explorer Connector.

Microsoft Office Connector

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

- Microsoft Word 2003 & 2007
- Microsoft Excel 2003 & 2007
- Microsoft Outlook 2003 & 2007

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

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

For example, create a Microsoft Word document that you wish to save in IQ as displayed in **Figure 10.4**. See the highlighted **Save to ImageQuest** icon in the new toolbar; click the icon to save the file to IQ.

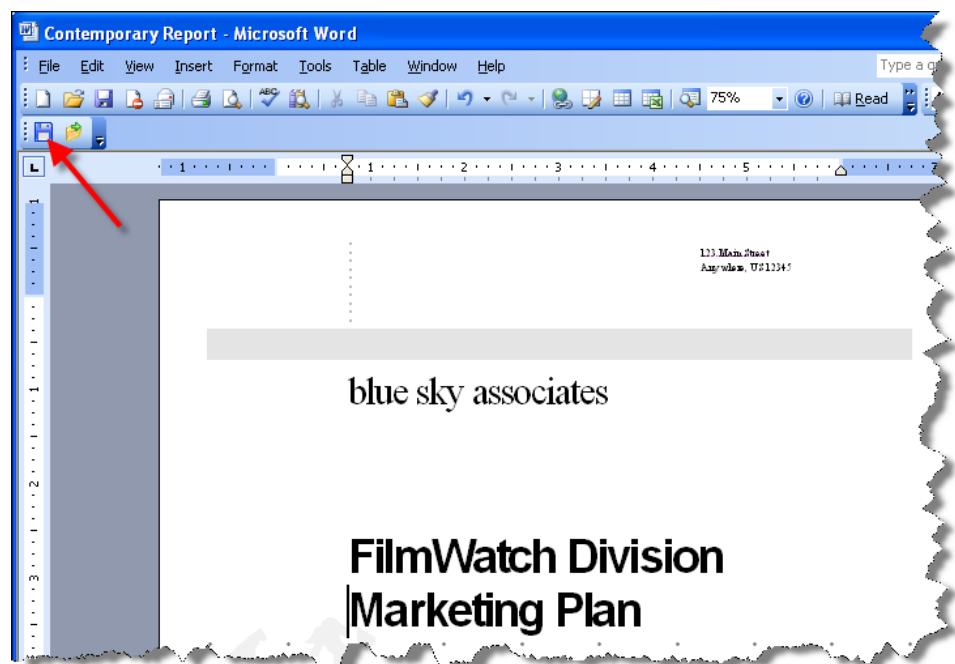


Figure 10.4: ImageQuest Icons in Microsoft Word 2003

The "Save Changes" window appears allowing the user to "Add a Revision" or "Create a New Document" as demonstrated in **Figure 10.5** on the following page. Since this is a new document, adding a revision to an existing document is not possible so the option is disabled. Select the Document Type and assign attributes; click "OK" when finished. The file is now saved to IQ and is searchable from IQdesktop using the index information.

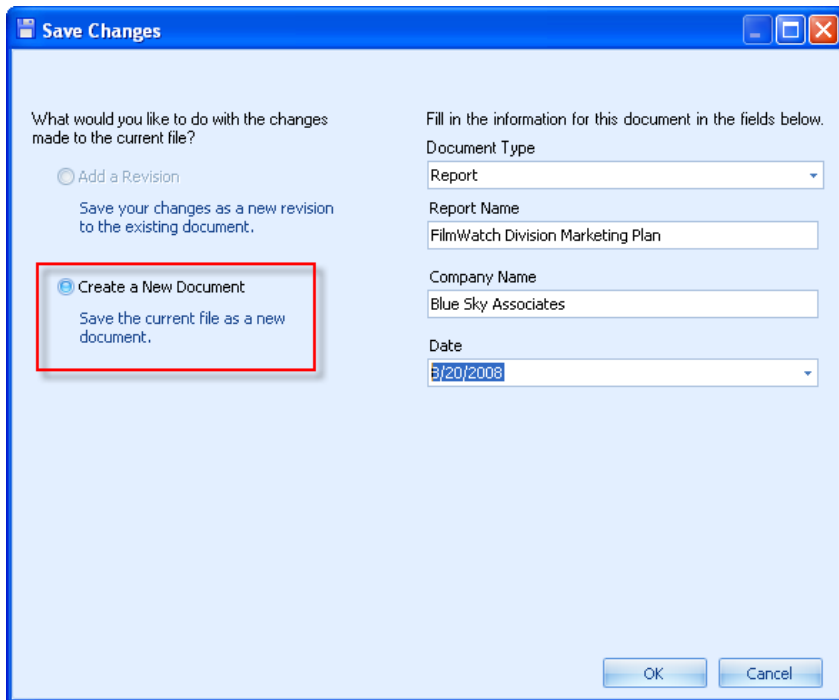


Figure 10.5: Save Changes

Now that the document is stored in IQ, it may be retrieved using IQdesktop or by using the **Open from ImageQuest** button from the ImageQuest Toolbar as seen below in **Figure 10.6**. Clicking the **Open from ImageQuest** button brings up a new window allowing you to search for documents as well as access your **Watch** and **Route** lists.

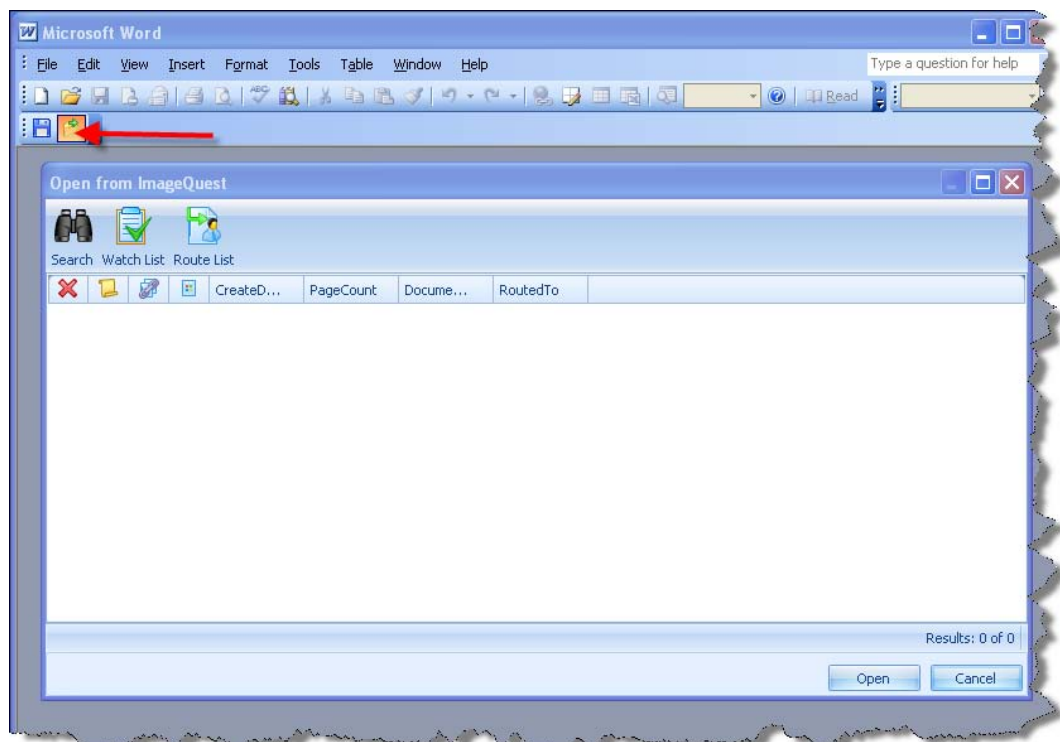


Figure 10.6: Open from ImageQuest

To find the document we saved earlier, click on the “Search” icon and enter the appropriate attributes and click the “Search” button. See **Figure 10.7** below.

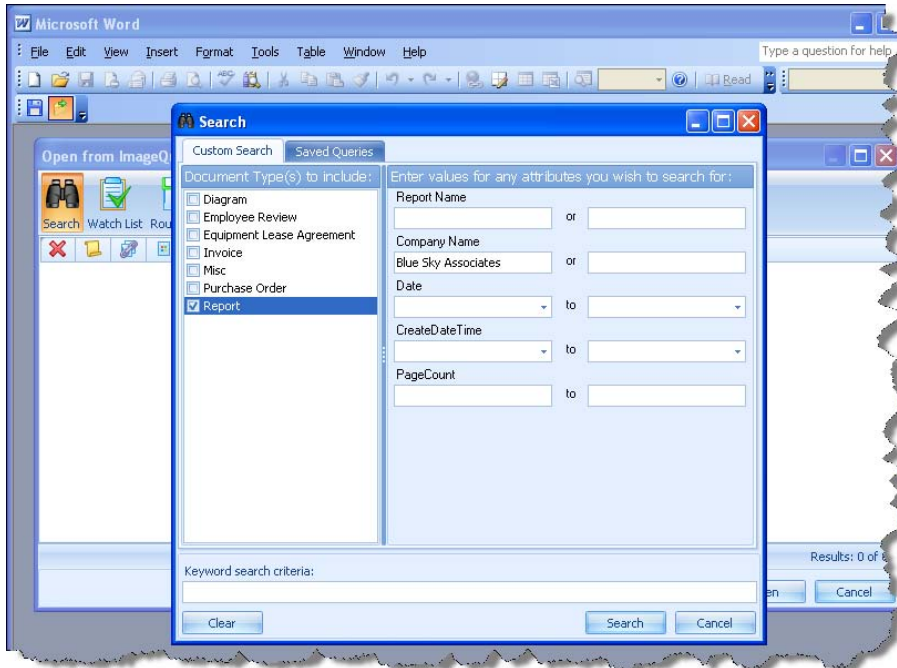


Figure 10.7: Open from ImageQuest Search Screen

The search results will be displayed in the grid. Double-click on the record or highlight the record and click the “Open” button as shown below in **Figure 10.8** to open the document.

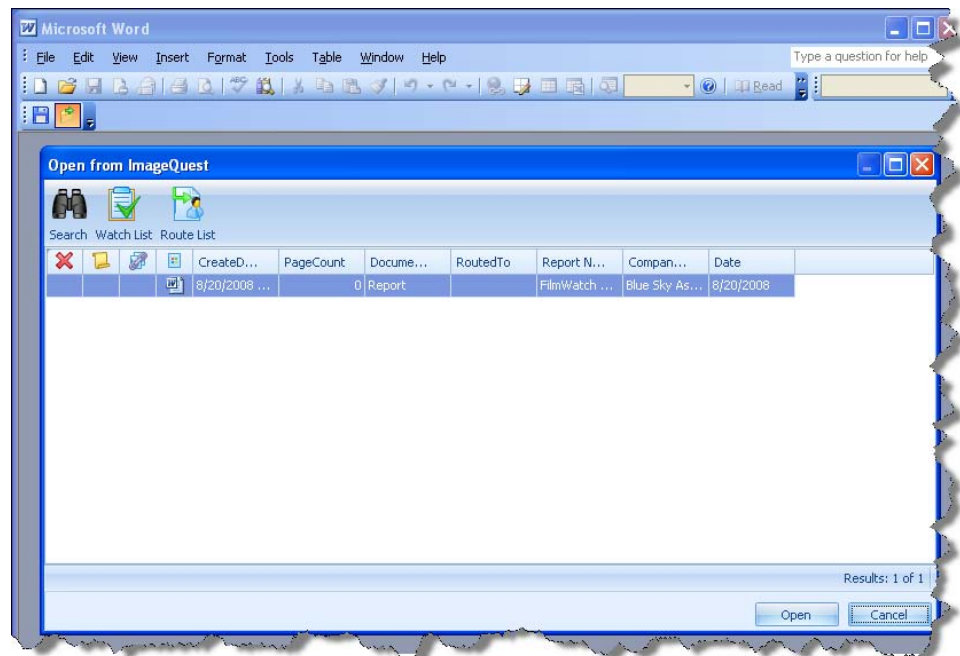


Figure 10.8: Search results

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

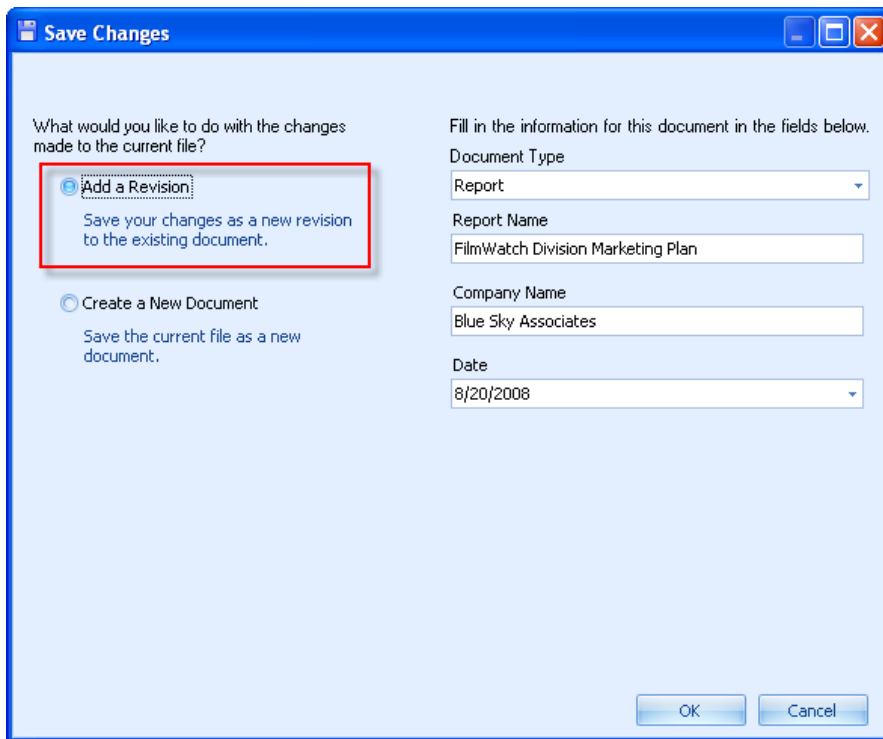


Figure 10.9: Add a Revision

When a document is revised, the Document Type and all associated attributes on the “Save Changes” screen will replace the existing document metadata. Any previous versions of the document can still be accessed from the **History** panel by highlighting the “Revision” action and clicking on the “View Revision” button as shown on the next page in **Figure 10.10**.

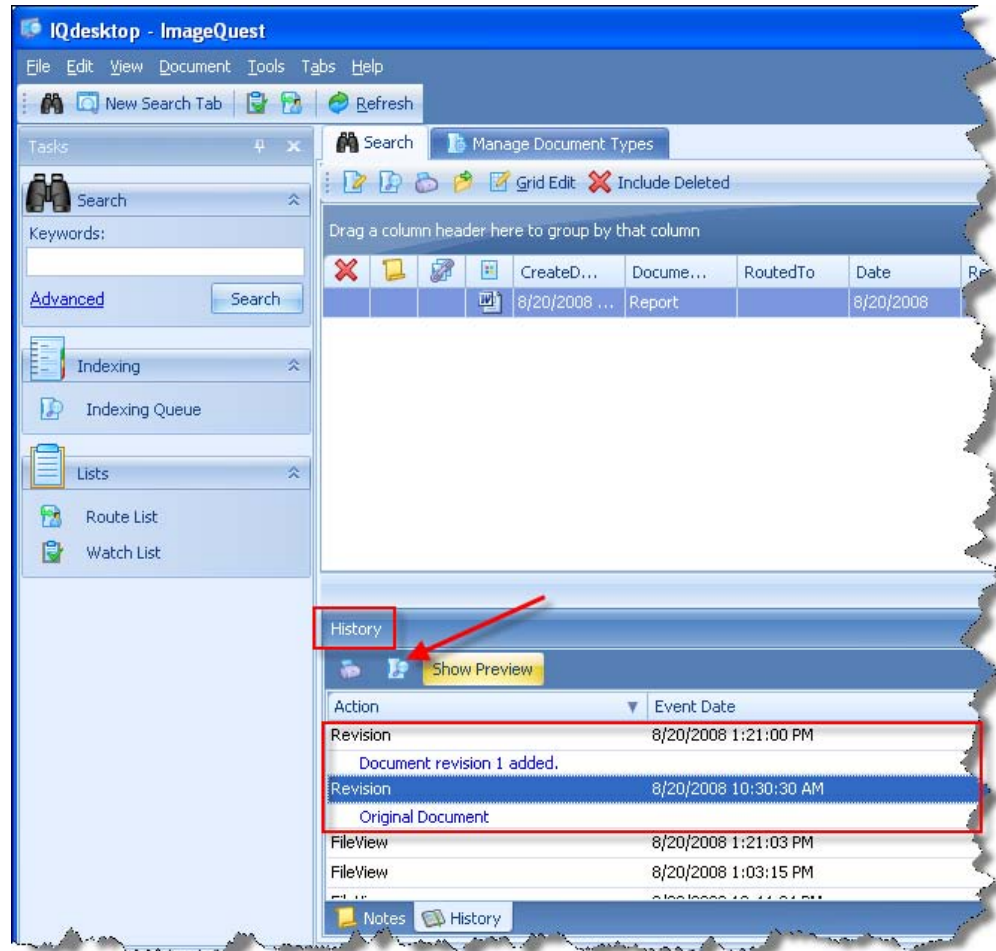


Figure 10.10: View Revision

Note: Microsoft Word and Excel 2007 function the same as the 2003 versions; however, the icons are located in the ImageQuest ribbon as seen in Figure 10.11.

Note: Only the most recent document revision can be opened directly from Microsoft Word or Excel.

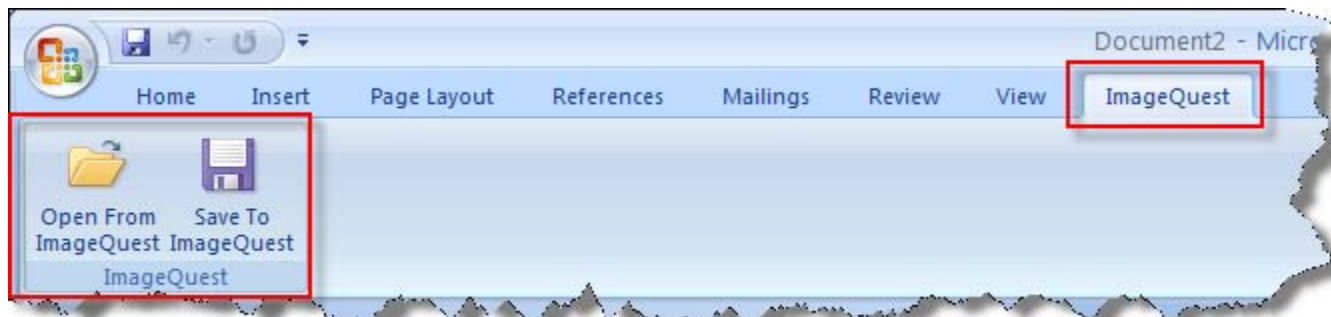


Figure 10.11: ImageQuest Ribbon in Microsoft Word 2007

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

To store an email message in IQ, open Microsoft Office Outlook and locate the **Send to ImageQuest** icon in the toolbar as highlighted in **Figure 10.11**.

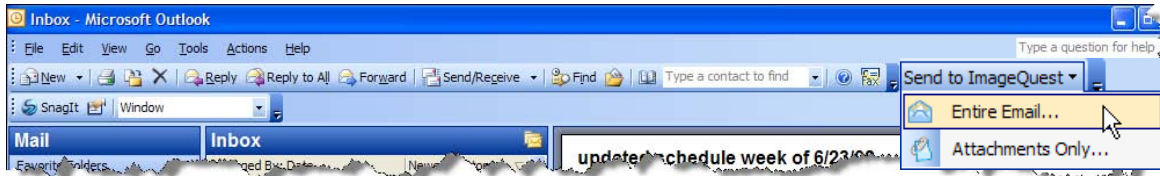


Figure 10.11: Microsoft Outlook 2003 — Send to ImageQuest

To send the entire email to IQ, highlight the email in Microsoft Outlook, click **Send to ImageQuest** and select “Entire Email...”. The **Send to ImageQuest** window appears allowing the user to select a Document Type and fill in the associated attributes as demonstrated in **Figure 10.12** below. Click the “OK” button when finished.

Figure 10.12: Send to ImageQuest

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

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

The “Choose Attachments” window appears allowing the user to select which attachments get stored in IQ as modeled in **Figure 10.13**; click “OK”.

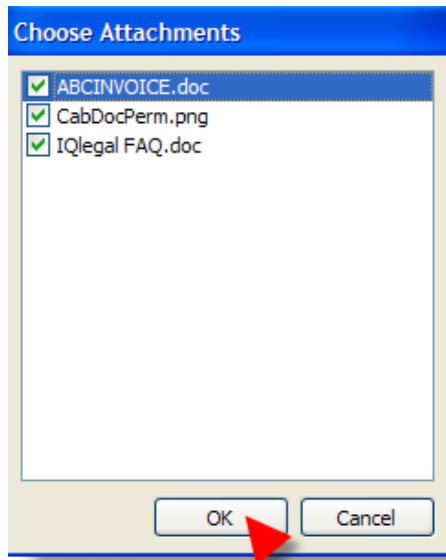


Figure 10.13: Choose Attachments

The **Send to ImageQuest** window appears allowing the user to select a document type and fill in the associated attributes as seen in **Figure 10.14**. Click the “OK” button when finished. A message box will appear saying that the files were saved successfully to IQ. These attachments are now searchable from IQdesktop.

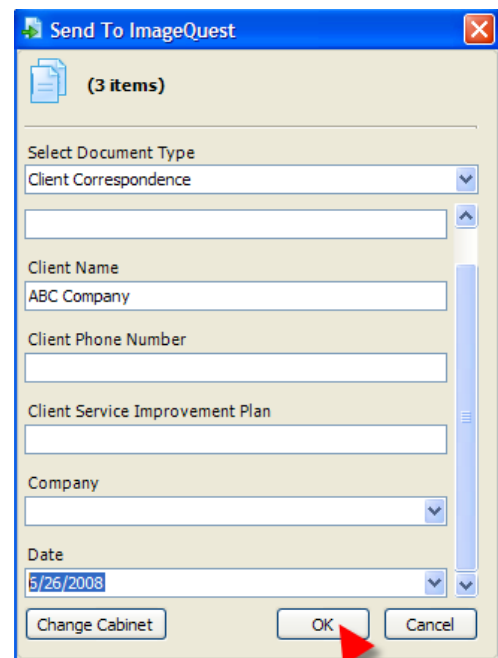


Figure 10.14: Indexing Attachments

Note: In the example on the previous page, three file attachments were selected to send to IQ. All three attachments will receive the same index information.

Note: Users must have the “Add Document” and “Update Document” permissions in order to use the Microsoft Window Office Connector.

Corel WordPerfect Connector

IQmfp provides an add-in for Corel WordPerfect X3. It functions identically to the Microsoft Office Connector for Microsoft Word 2003 and has the same toolbar icons (see **Figure 10.15**). Follow the instructions starting on pg. 64 for more information.

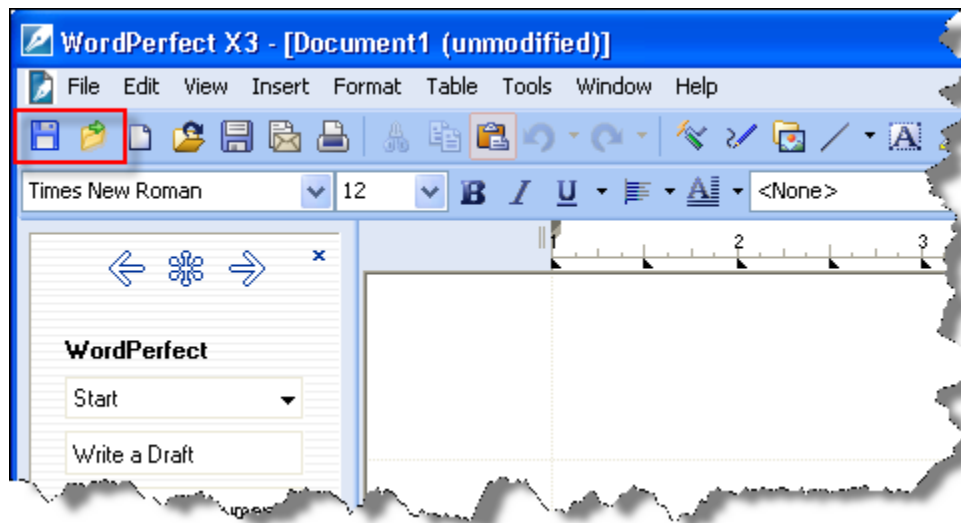


Figure 10.15: IQ Icons in WordPerfect X3

Note: Users must have the “Add Document” and “Update Document” permissions in order to use the Corel WordPerfect Connector.

IQscan

IQscan allows users to scan and index documents into IQ and at the same time optionally make a copy and/or send a fax simultaneously with the touch of one button. HP Smart Document Scan Software (SDSS) is required in order to use IQscan.

To access IQscan, go to **Start > All Programs > Informa Software** and click on **IQscan**. The “Configure Options” window will appear on the first launch as seen in **Figure 10.16** on the following page. Select the scanner you wish to use from the drop down list. This scanner must already be configured to work with SDSS. Please refer to the HP SDSS documentation for further information on setting up your scanner.

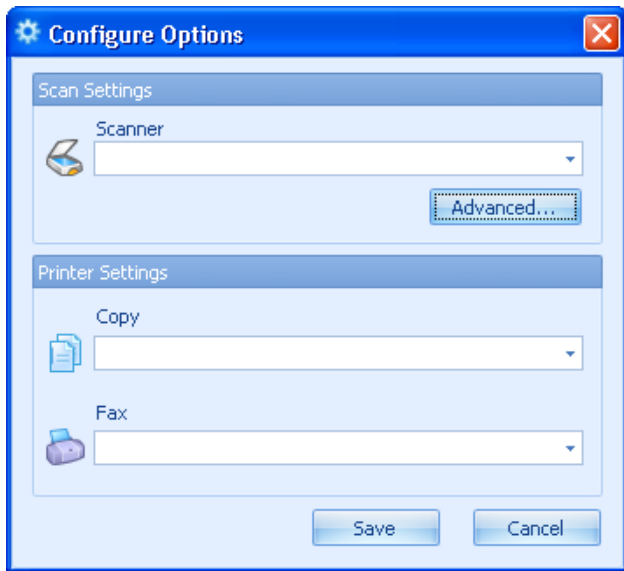


Figure 10.16: Configure IQscan Options

After selecting the scanner, clicking on the “Advanced...” button will display the IQscan Profile Settings window. The IQscan profile is automatically created in SDSS by clicking this button. Of the four tabs in this window, only two of them are editable: “Scan” and “Process”. The “Profile” and “Destination” tabs are not editable in this particular profile and will revert back to the default settings if they are modified.

The “Scan” tab allows the user to set the paper source, page size, color mode and other settings related to scanning while the “Process” tab allows the user to set other scanner options such as automatic page resizing and automatic page cropping. See **Figure 10.17** on the following page.

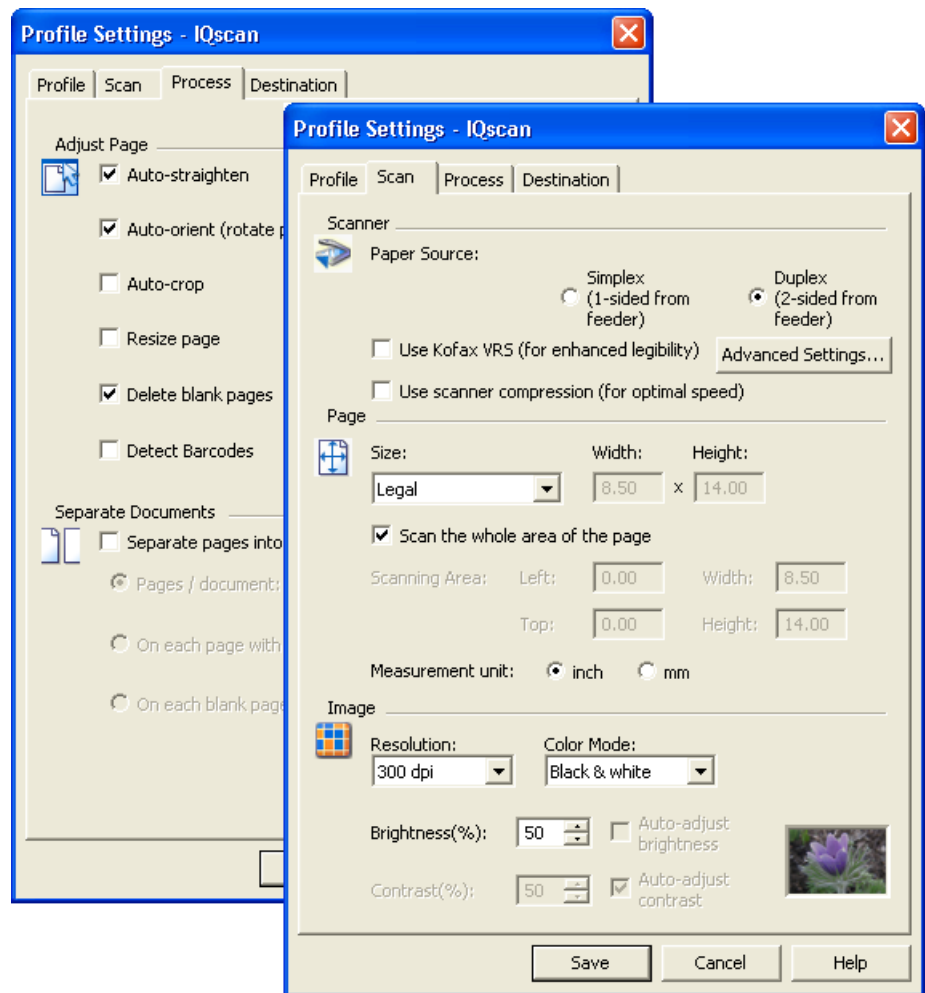


Figure 10.17: IQscan Profile Tabs

The “Printer Settings” section of the “Configure Options” window allows the user to select which printers will output the “Copy” or the “Fax”. The printers must be setup on the local workstation first. You must also have third party fax software installed that utilizes a virtual fax printer in order to use the “Fax” capability of IQscan such as Captaris RightFax or Microsoft Fax. After configuring the “Scanner” and “Printer Settings”, click the “Save” button as illustrated in **Figure 10.18** on the following page. This screen can also be accessed from the **File > Options** menu in the IQscan window.

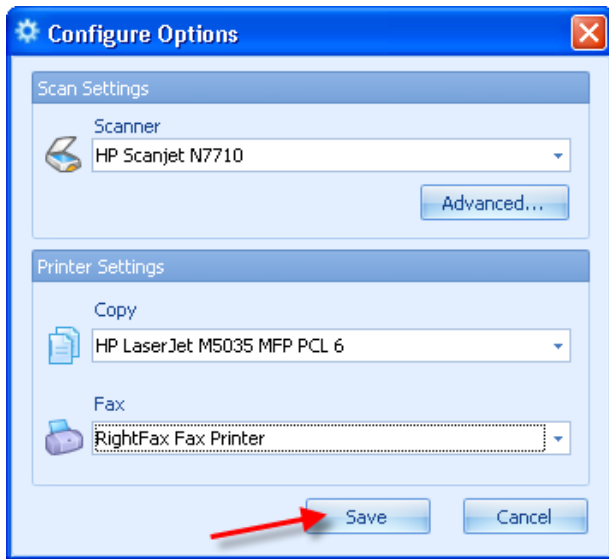


Figure 10.18: Configure IQscan Options

The main IQscan window now appears, allowing the user to **Scan**, **Copy**, and/or **Fax** a document as seen in **Figure 10.19**. Scan and Copy are selected by default.

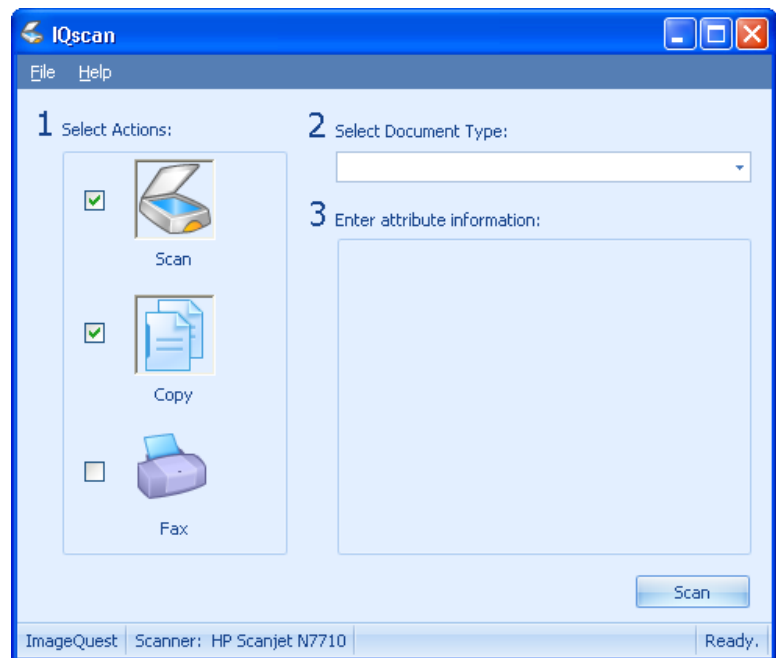


Figure 10.19: IQscan

To only scan a document into IQ, click the “Copy” button to deselect it, click the drop down box to select a Document Type, fill in the associated attributes and then click “Scan” as seen in **Figure 10.20**.

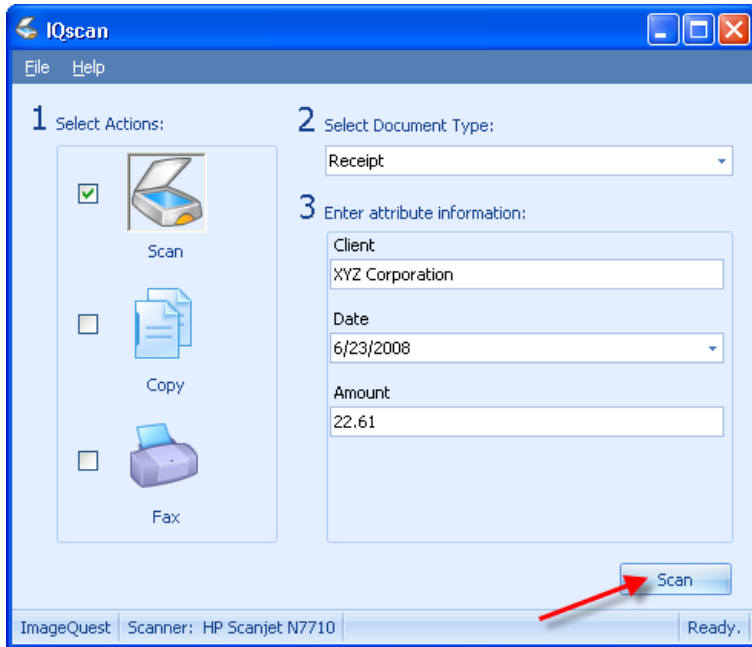


Figure 10.20: IQscan – Scan to IQ

The SDSS “Scan Progress” window is launched as seen in **Figure 10.21** on the following page, allowing the user to manipulate the scanned images as they are scanned. Please reference the SDSS documentation for further information on the “Scan Process” window.

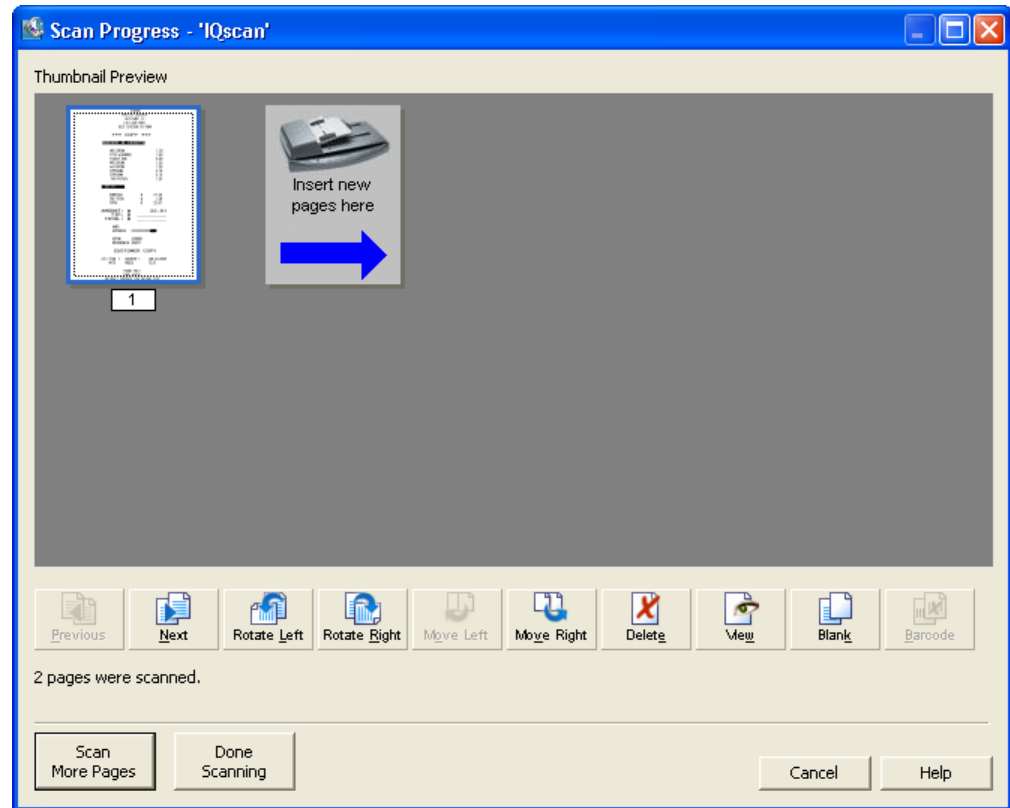


Figure 10.21: Scan Progress

After the last page is finished scanning, pressing the “Done Scanning” button will store the document in IQ and return the user back to the main IQscan window.

If for example we had instead deselected the “Scan” option and enabled the “Copy” and “Fax” options, the user would not need to specify any index information. After clicking the “Scan” button, the SDSS “Scan Progress” would still appear as shown above in **Figure 10.21**. After clicking the “Done Scanning” button, the user is first prompted with the “Printer Options” as shown below in **Figure 10.22**.

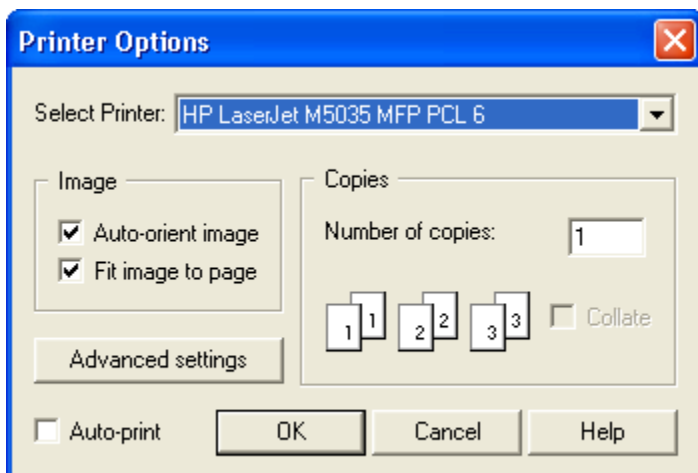


Figure 10.22: Printer Options

Click “OK” to print the scanned document to the selected printer. Since we had the “Fax” option selected during scanning, we are now prompted to enter the fax information for where the document should be faxed to as seen below in **Figure 10.23**. In our example, we have our fax printer configured to use Captaris RightFax.

Figure 10.23: Fax Information Dialog Box

After filling in the fax information, click on the “Send” button to fax the scanned document to the recipient that was specified.

Note: Figure 10.23 above shows a screenshot from the Captaris RightFax client. This screen will look different depending on the fax software configured in your environment.

Note: Users must have the “Add Document” permission in order to use IQscan.



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