Image Quest

User's Guide





Copyright Information

Copyright © 2014 Informa Software. All Rights Reserved.

No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any other language or computer language in whole or in part, in any form or by any means, whether it be electronic, mechanical, magnetic, optical, manual or otherwise, without prior written consent of Informa Software.

Informa Software disclaims all warranties as to this software, whether expressed or implied, including without limitation any implied warranties of merchantability, fitness for a particular purpose, functionality, data integrity or protection.

Pentium is a registered trademark of Intel Corporation.

Windows is a registered trademark of Microsoft Corporation.

Trademarks of other companies mentioned in this documentation appear for identification purposes only and are the property of their respective companies.

Title	ImageQuest User's Guide
Version	11.3
Revision	February, 2014

Table of Contents

Introduction to ImageQuest5
Welcome to ImageQuest!5
Scanning with ImageQuest (OXPd)6
IQdesktop10
Launching IQdesktop10
Indexing Queue
Indexing and Committing Batches
Page Features in the Indexing Queue
Training Mode
IQ Smart Indexer
Persistent Attributes during Indexing (Sticky Attributes)37
PDF Indexing
Searching for Stored Documents39
Custom Search Tab 39
Saved Queries Tab 43
Keyword Search
Customize List
Viewing a Document47
Configuring the View
Preview Pane
Column Customization53
Best Fit
Sorting
Grouping
Filters
Save Layout
Updating Documents
Notes

	Edit a Document	63
	Grid Edit	66
	Delete or Undelete Documents	66
	Revising Documents	70
	Document History	71
	Scan to ImageQuest	73
	PDF Annotation	77
	Work Queue	82
	Work Queue Columns	83
	Reassign Work Items	84
	Record Locking	85
	Find Similar Documents	86
	New Search Tab	87
	Save Local Copy	88
	Email Document	89
	Batch Print	90
	Watch List	91
	Export to Folder	92
	Duplicate	94
	Show Associated	95
	Import a File	96
	Managing Document Types	98
A	dditional ImageQuest Client Applications	99
	Microsoft Windows Explorer Connector	99
	Microsoft Office Connector	.101
	IQprinter	.109
	ImageQuest Assistant	.112

Introduction to ImageQuest

Welcome to ImageQuest!

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

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

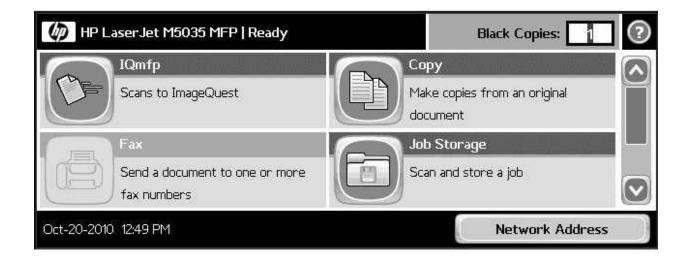
Please contact us below for technical support and/or troubleshooting:

QLS Solutions Group, Inc. Toll Free: (800) 859-2203 Local: (716) 852-2203 Email: <u>info@QLS.com</u> Website: <u>http://www.QLS.com/IQmfp</u>

Scanning with ImageQuest (OXPd)

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

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



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

Scan to ImageQuest	?
User:	
abaker]
$\overline{}$	_
More Options	

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

User		?
User		
User abaker Administrator		
jsmith		
🔘 kthomas		
	ОК	Cancel

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

User		2
User		
🔘 abaker		
User abaker Administrator ismith kthomas		
 jsmith 		
🔘 kthomas		
	ОК	Cancel

The screen should then change to reflect the new username:

🙆 💿 Scan to ImageQuest		2
User:		
jsmith		
	More Options	-

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

Cancel Job 🕥 Start S	Scan		?
Original Sides 1-sided		Content Orientation Portrait	
Resolution 300 dpi	Page 2	Driginal Size Letter 8.5"x11"	B
Color/Black Black/White scan		ob Build On	E
	~		

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



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

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

Place originals on glass or in do After last segment has been s		[6] AD WATH VERSION COMPLEX CONTRACTOR CONTRACTOR	b segment.
	Finish	Scan	Cancel Job

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

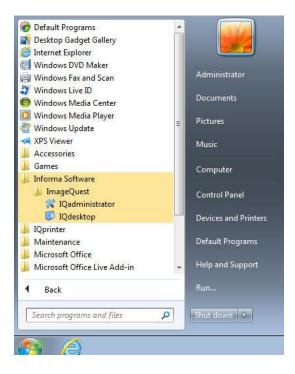
IQdesktop

IQdesktop—installed as a Windows application—is the primary ImageQuest component used to store and retrieve documents. IQdesktop provides all of the features necessary for document indexing and retrieval, including advanced features such as document routing, document revision, complete document history review, adding and viewing of notes, and the ability to export documents to folders.

In addition to basic searching, Full-Text Search is available in IQdesktop. Most common Windows file types such as .txt, .doc, .pdf, and .xls documents are compatible with Full-Text search after they have been indexed.

Launching IQdesktop

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



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 ImageQuest.

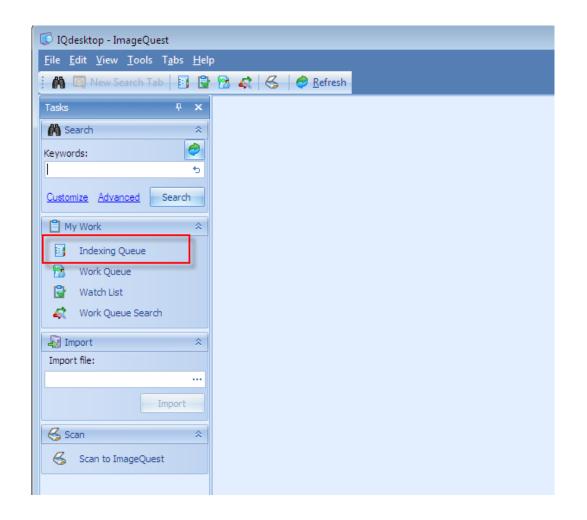
The screenshot below shows the default layout of IQdesktop's major features: "Toolbar", "Search", "My Work", "Import" and "Scan".

🗊 IQdesktop - ImageQuest	• •
🖓 🖾 New Search Tab 📳 🕃 🔂 🎣 🔗 🎯 Befresh	
Tasks 4 x	
A Search	
Keywords:	
Customize Advanced Search	
🗎 My Work 🌣	
Indexing Queue	
Work Queue	
Watch List Work Queue Search	
A Import The:	
Import	
Ĝ Scan	
Scan to ImageQuest	
User: tjones Cabinet: ImageQuest Server: 2k8x64a.development.com	

Indexing Queue

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

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



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

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

IQdesktop - ImageQuest			_			_				_		
ile <u>E</u> dit <u>V</u> iew <u>B</u> atch <u>T</u> ools T <u>a</u>												
A 🖾 New Search Tab	🔁 🦛 😤 🥏 <u>R</u> e	fresh										
ĭasks	Indexing Queue 🗴											
A Search 🌣	i 🕼 🔂 💥 🖬 🕴		1 🗗 🕹 🧮									
leywords:	Drag a column header her	e to group by	that column									
5	Create Date Time	Page Count	Document Type	Indexing Resource	Status	Locked	1	Mfp Input User	Mfp Address	Mfp Host Name	Mfp Serial	Mfp Display Name
Customize Advanced Search	12/20/2012 11:26:52 AM		1 MFP Scan	tjones	1				Ctrl+I			
	12/20/2012 11:26:53 AM		1 MFP Scan	tjones	\checkmark			Index				
My Work 🏾 🕆	12/20/2012 11:26:53 AM		1 MFP Scan	tjones	\checkmark		2		Ctrl+Alt+R			
Indexing Queue	12/20/2012 11:26:54 AM		1 MFP Scan	tjones	\checkmark		×	Delete	Ctrl+Alt+D			
Work Queue	12/20/2012 11:26:55 AM		1 MFP Scan	tjones	\checkmark		-					
Work Queue	12/20/2012 11:26:55 AM		1 MFP Scan	tjones	\checkmark							
g Import												

The **Index** feature allows users to save documents in ImageQuest and establish their attributes so that they can be efficiently searched for within ImageQuest. To index a batch, highlight the batch and select **Index** from the "Batch" menu, double-click the batch, or right-click the batch and select **Index**.

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

Note: Batches may be previewed by opening the Preview Pane using the button shown here.



💭 IQdesktop - ImageQuest								_				
<u>File Edit View Batch Tools Tab</u>	os <u>H</u> elp											
🖍 🔟 New Search Tab 📑 🕃	🔁 🛋 🗟 🥔 Be	fresh										
Tasks 4 X	Indexing Queue 🕨	0										
A Search *	i 🕑 🔂 💥 🖬 [i		F 6 7									
Keywords:	Drag a column header he		and the second se									
t			541102775C									
	Create Date Time	The second s	ocument Type	Indexing Resource	Status	Locked	M	1fp Input User	Mfp Address	Mfp Host Name	Mfp Serial	Mfp Display Name
Coatomize Advanced Scarch	12/20/2012 11:26:52 AM	Annual Contraction of the second s	P Scan	tjones	1		12	Index	Ctrl+I			
	12/20/2012 11:26:53 AM 12/20/2012 11:26:53 AM		P Scan	tjones	~		1		Ctrl+Alt+R			
	12/20/2012 11:26:53 AM 12/20/2012 11:26:54 AM		P Scan Scan	tjones	~			2	Ctrl+Alt+D			
Indexing Queue	12/20/2012 11:26:54 AM		P Scan P Scan	tjones	~		~	Delete	Ctri+Alt+U			
1 Work Queue	12/20/2012 11:26:55 AM		P Scan	tjones	~							
🕞 Watch List	12/20/2012 11:20:55 AM	1 14	P Start	gunes	V							
Work Queue Search												
St. Work Queue Search												
🙀 Import 🛛 🕆												
Import file:												
Import												
😪 Scan 🔹												
Scan to ImageQuest												
	*											
	Ready.											Total items:
	ricody.											Total items:

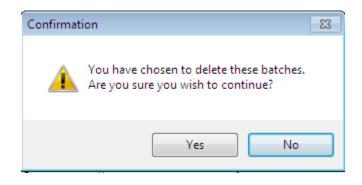
In the "Batch Reassignment" window below, use the drop-down menu to select the User or Role to reassign the selected batch to as demonstrated and click "OK".

🔁 Batch Reassignment		
Reassign to: 🔘 Role 🤇	1 User	
Administrator	*	
Batches that are locked by a user	😚 Batch Reassignment	
reassigned.	Reassign to: 🔘 Role	🖲 User
OK	Administrator	
	Administrator bjones dogden	🔁 Batch Reassignment 💽
	jsmith tjones	Reassign to: 🔘 Role 🔘 User
		jsmith 🛛 🔻
		Batches that are locked by a user will not be reassigned.
14		OK Cancel

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 user.

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

<u>B</u> atc	h <mark>i <u>T</u>ools T<u>a</u></mark>	abs <u>H</u> elp
	Index	Ctrl+I
×	Delete	Ctrl+Alt+D
1	Reassign	Ctrl+Alt+R



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

Indexing and Committing Batches

Document batches are "time-stamped" with the specific time they were scanned. To index one of the batches, highlight the batch and select **Index** from the "Batch" menu, double-click the batch, or right-click the batch and select **Index**.

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

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

Indexing Queue 🗴						
👩 Commit 🚍 Training Mode 🛛 🖓 Pan 🜆	Select 🛛 🐗 Close 🤜 🛷 🤚					
Pages Document Type		ge 🝷 Rotate 90° P	rint Smooth Image			
2 Select Document Ty	/pe 🔻					
2 3 4 5			INVOI	ce ir	forma	
		REMIT TO: Informa Softwi 123 Baker Stre Orlando, FL 32	et.	INVOICE NUMBER INVOICE DATE:	10/01/12	
			BILL TO: Big Corp. P.O. Box 102332 Norman, OK 75432	SHIP TO: Big Corp. 345 Cosk Parkway Stillwater, OK 75622		
		item #	Description	Quantity U	nit Price Total	
		76802 76902 PEN100 PEN102	Copy Paper – WHT, LTR Copy Paper – WHT, LEGAL Pen – BLK Pen – BLU	10 28 200 0.	i.50 255.00 1.00 280.00 75 150.00 75 150.00	
Route To:						
	+ b					
Message:		AMOUNT DUE			835.00	
Cancel	Commit					
Documents: 0						

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

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

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

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

Indexing Queue 💌						
🗐 Commit 📃 Training N	Node 🖉 Pan 🔤 Select 😽 Clo	se 🤿 🛷 🥠				
Pages	Document Type	Zoom: 100% - Rotate 90° Pri	int Smooth Image			
1 2 3 4	Select Document Type 🔹	INVOIC	E	softwo		*
5			INVOICE NUM INVOICE DATE			
		LTO: Corp. . Box 102332 man, OK 75432	SHIP TO: Big Corp. 345 Oak Parkway Stillwater, OK 75622			E
		cription	Quantity	Unit Price	Total	
	Route To:	y Paper – WHT, LTR y Paper – WHT, LEGAL र्ौ) – BLK) – BLU	10 10 200 200	25.50 28.00 0.75 0.75	255.00 280.00 150.00 150.00	
Documents: 0	Cancel Commit	4) Þ	•

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

es 1	Document Type	Zoom: Ent	tire Page 🔻 Rotate 90° Prin	nt Smooth Image				
2	Select Document Type	•						
3 4								
5			AMO	PEN100 PEN100	Item #		REMI Inforr 123 B Orlan	
			AMOUNT DUE	2200	~ *		REMIT TO: Informa Software 123 Baker Street Orlando, FL 32810	
				Pen – BLV Pen – BLV	Description Copy Paper	BILL T Big Co P.O. B Norm:	are net 2810	
				BLU BLU	ption Paper – V	BILL TO: Big Corp. P.O. Box 102332 Norman, OK 75432		
				VHT, LEG	WHT, LTR	5432		
				Þ				NV
								INVOICE
				200	Quantity 10	SHIP TO Big Corp 345 Oak Stillwate		
						SHIP TO: Big Corp. 345 Oak Parkway Stillwater, OK 75622	INVOICE NUMBER: INVOICE DATE:	
	Route To:			0.0 ×	2 6	622	NUMBE DATE:	o = •
		5		28.00 0.75 0.75	Unit Price 25.50			informa software
	Message:		68	1 1 2			868470 10/01/12	§∃)
		^	835.00	150.00 150.00	Total 255.00			ο Ω)
		•						
	Cancel Comm	nit						

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

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

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

🔄 Indexing Queue 💌 🗲	Indexing Queue 🛛 🔶							
🗐 Commit 🔳 Training M	lode 🕘 Pan 🔤 Select 🛛 🐗 Clo	ose 🗟 🛷 🕹						
Pages	Document Type	Zoom: Entire Page	Rotate 90° Print Smooth Imag	je				
1	Select Document Type 👻							
2								
3				informa				
7			INVC	software				
5			REMIT TO: Informa Software 123 Baker Street Orlando, FL 32810	INVOICE NUMBER: 865470 INVOICE DATE: 10/01/12				
			BILL TO: Big Corp. P.O. Box 102332 Norman, OK 75432	SHIP TO: Big Corp. 345 Qok Parkway Stillwader, OK 75622				

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

Indexing Queue 🗙								
🗐 Commit 📃 Training M	1ode 🛛 🕙 Pan 🔤 Select 🛛 🐗 Clo	ose 🦻 🖗 🌗						
Pages	Document Type	Zoom: Entire Page 💌 Rota	te 90° l	Print Smooth Image				
1 2 Peginning 3 Exclude th 4 Clear Sele 5 Move Pag	g of Document.	Zoom: Entire Page V Rota	REMIT TO: Information 500 Orliende, FL 3 705902 705902 705902 705902 705902 705902 705902 705902 705902 705902 705902 705902 705902 705902 705902	INVOIC wire ret Jatio P.O. Box 10232 P.O. Box 10232 Merrary, 0K 75432 Description Copy Paper – WHT, LTR Copy Paper – WHT, LTR Copy Paper – WHT, LTR Pen – BLU	J	NE: 10,40	are	
	Cancel Commit							
Documents: 0								

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

Note: If there are no document choices in the "Document Type", see the section for "Managing Document Types" or contact your System Administrator.

🔄 Indexing Queue 🗙								
🞒 Commit 🔳 Training M	1ode 🕘 Pan 🔤 Select 🛛 🐗 Clo	ose 🦻 🖉 🌗 👘						
Pages 2 3 4 5	Document Type Select Document Type Client Directory Collections Current Real Estate Properties ImageQuest Administrator's Guide	Zoom: Entire Page	▼ Rotate 90° Pr	int Smooth Image		infor softw		
	Invoice MFP Scan Receipts			t	INVOICE NUI INVOICE DAT SHIP TO: Big Corp. 345 Cosk Parkway Stillwater, DK 75622	E: 10/0	470 91/12	
			76802 76902 PEN100	Description Cup Paper - WHT, LTR Cup Paper - WHT, LEGAL Pan - ILK Pan - ILK En - ILU	Quantity 10 200 200	Unit Price 25.50 28.00 0.75 0.75	Total 255.00 280.00 150.00 150.00	
Documents: 1	Route To: Message: Cancel Commit		AMOUNT DUE				835.00	

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

Indexing Queue 🗙		
🞒 <u>C</u> ommit 🔳 Training M	1ode 🔚 Pan 🌆 Select	🍕 Close 🤿 🔗 🌗
Pages 📝 1 - Invoice	Document Type Invoice	Zoom: Entire
2 3 4	DocumentGroup (None)	★ 5
5	CustomerName	5
	InvoiceDate	
	InvoiceAmount	<u>• 5</u>
		5
	Route To:	* *
	Message:	
		Ĵ.
	Cancel	ommit
Documents: 1		

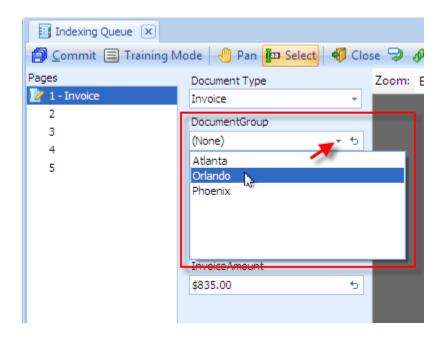
"**Route To**" is a system attribute available for every Document Type that allows the user the option to select a User or Role to route the document to. In the screenshot on the next page, "jsmith (User)" is selected from the "Route To" list for the highlighted Invoice. If this batch were committed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

Indexing Queue	×				
🗐 <u>C</u> ommit 🔳 Tr	aining N	Aode 🔚 🕘 Pan 📴 Select	📲 Clo	ose 🤿 .	\$ J
Pages		Document Type		Zoom:	Entire F
📝 1 - Invoice		Invoice	-		
2		DocumentGroup			
3 4		(None)	- t		
5		CustomerName			
		Big Corp.	5		
		InvoiceDate			
		10/1/2012	+ 5		
		InvoiceAmount			
		\$835.00	5		
		Route To:			
			+ 5		
		Administrator (User) 📝			
		bjones (User)		- 1	
		dogden (User)			
		jsmith (User) Tom Jones/tjones (User)			
		AP/AR (Role)			
		Sales (Role)		_	
Documents: 1					
	Route	e To:			
		n (User) 🗸 🛨			
	Messa				
		se approve for payment			
	ried	se approve for payment			
			r -		

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

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

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



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

If a list attribute is being assigned and a new item must be added to the list—e.g., a new CustomerName must be added—then the new item may be added during indexing if the user has the "Add List Items" permission.

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

Indexing Queue 🗙			
🗐 Commit 🔳 Training N	lode 🔚 Pan 🌆 Select	🛷 Clo	se 🦻
Pages	Document Type		Zoom:
2 1 - Invoice	Invoice	*	
2	DocumentGroup		
4	Orlando	- 5	
5	CustomerName		
	Big Corp.	5	
	InvoiceDate		
	10/1/2012	* 5	
	InvoiceAmount		
	\$835.00	5	
	Route To:		
	jsmith (User)	* 5	
	Message:		
	Please approve for paymer	nt 🔶	
	Cancel	ommit	
Documents: 1			

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

Indexing Queue 🗙	Mode 🔚 Pan 📴 Select 😽 Close 🤿 🛷 🥠
Pages 📝 1 - Invoice	Document Type Zoom: Entire Page
2	Invoice
3	DocumentGroup
🛿 4 - Invoice	Orlando 👻 🕤
5	CustomerName
	Haggerty, LLC 🕤
	InvoiceDate
	10/1/2012 🔹 🕤
	InvoiceAmount
	\$396.00 5
	Route To:
	AP/AR (Role) - 5
	Message:
	Please process for payment
	Cancel Commit
Documents: 2	

"Clear the current value" allows users to clear attribute information that was entered or selected during a search or edit. This feature is available in all IQ search, edit or indexing windows. To clear a value, click the button to right of the entry field.

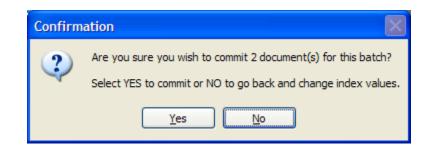
CustomerName	
	5

Note: The "Clear the current value" feature is not available for True/False or required attributes in the edit or indexing windows.

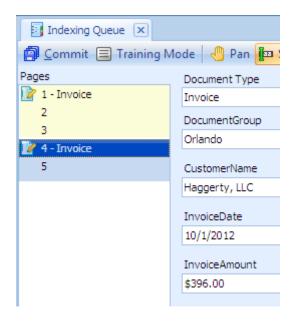
To commit the batch to ImageQuest, click on the "Commit" button, as shown below.

Indexing Queue 🗙								
🗐 Commit 🔳 Training M	lode 🔚 Pan 📴 Select 🐗 Clo	ose 🦻 🖗 🤚 👘						
Pages	Document Type	Zoom: Entire Page		Print Smooth Image	2			
📝 1 - Invoice	Invoice 👻							
2 3	DocumentGroup						~	
y 4 - Invoice	Orlando 🔹 🕤			INVO	ICF	inforr		
5	CustomerName					softwo		
	Haggerty, LLC 5		REMIT TO: Informa Soft 123 Baker St		INVOICE NUP INVOICE DAT		/12	
	InvoiceDate		Orlando, FL		SHIP TO:			
	10/1/2012 - 5			Haggerty, LLC P.O. Box 201-B	Haggerty, LLC 345 Oak Parkway Suit	te 300		
	InvoiceAmount			Tucson, AZ 40326	Phoenix, AZ 60466			
	\$396.00 5		item #	Description	Quantity	Unit Price	Total	
			PEN100 PEN102 ENVLTR	Pen – BLK Pen – BLU Envelopes (Ltr, 500)	200 200 2	0.75 0.75 10.50	150.00 150.00 10.50	
			BINDLG	Binder Clips – Large (12)	10	8.50	85.50	
	Route To:							
	AP/AR (Role) 🔹 🕁							
	Message:							
	Please process for payment		AMOUNT DU	JE			396.00	
	Cancel Commit							
Documents: 2								

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



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

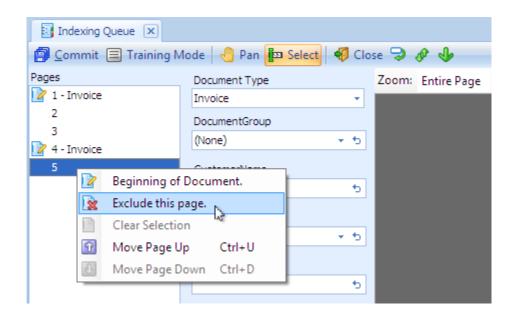


Note: If required index values were not entered, a "Document Error" screen will show which page and which document has the missing value. Click the "Abort" button to stop the batch commit and make any necessary corrections.

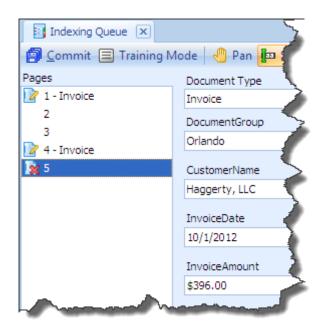
Once a batch is committed, the user will return to the Indexing Queue to show remaining batches to index as displayed below.

Page Features in the Indexing Queue

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



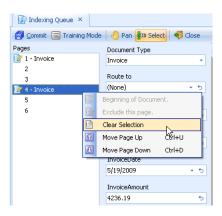
For example, as shown on the following page, Page 5 has been excluded. When this batch is committed, we will have two documents in ImageQuest: one, three-page "Invoice" document consisting of Pages 1, 2 and 3 and one, single-page "Invoice" document consisting of Page 4.



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

Indexing Queue 🙁			
🗐 <u>C</u> ommit 📃 Training M	lode 🔚 🕘 Pan 🌆 Sele	🔄 Indexing Queue 🛛 🗙	
Exclude thi Clear Select Move Page	tion -	Commit Training Pages 1 - Invoice 2 3 5 2 4 - Invoice	Mode Pan Sele Document Type Invoice DocumentGroup Orlando CustomerName Big Corp. InvoiceDate 10/1/2012 InvoiceAmount \$835.00

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



Training Mode

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

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

Indexing Queue 🗙		
🗿 Commit 🖃 Training M	1ode 🕘 Pan 🏧 Select 🛛 🐗 Clo	se 🤿 🖗 🌗
Pages Pages 1 - Invoice 2 3 5 4 - Invoice	Document Type Invoice DocumentGroup Save Image Position CustomerName Save Image Position InvoiceDate Save Image Position InvoiceAmount Save Image Position	Zoom: 200% • Rotate 90° Print Smooth Image er Street , FL 32810 BILL TO: Haggerty, LLC P.O. Box 201-B ?? Tucson, AZ 40326
	Route To:	Description
	Message:	Pen – BLK Pen – BLU Envelopes (Ltr, 500)
Documents: 2		

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

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

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

IQ Smart Indexer

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

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

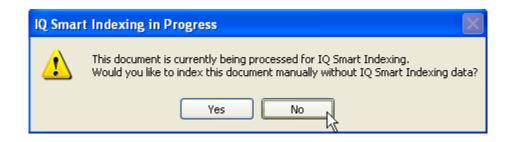
Orag a column header here to group by that column											
Create Date Time	Page Count	Document Type	Indexing Resource	Status	Locked	Mfp Input User	Mfp Address	Mfp Host Name	Mfp Serial	Mfp Display Name	
12/20/2012 11:26:52 AM	1	MFP Scan	tjones	V							
12/20/2012 11:26:53 AM	1	MFP Scan	tjones	\checkmark							
12/20/2012 11:26:53 AM	1	MFP Scan	tjones	\checkmark							
12/20/2012 11:26:54 AM	1	MFP Scan	tjones	\checkmark							
12/20/2012 11:26:55 AM	1	MFP Scan	tjones	\checkmark							
12/20/2012 11:26:55 AM	1	MFP Scan	tjones	\checkmark							
12/20/2012 4:15:05 PM	1	MFP Scan	tjones	\checkmark							
12/20/2012 4:15:05 PM	2	MFP Scan	tjones	\checkmark							
2/20/2012 4:15:05 PM	1	MFP Scan	tjones	\checkmark							
12/20/2012 4:15:05 PM	1	MFP Scan	tjones	\checkmark							
12/20/2012 4:15:05 PM	1	MFP Scan	tjones	\checkmark							
12/20/2012 4:15:05 PM	5	MFP Scan	tjones	\checkmark							
12/20/2012 4:15:05 PM	1	MFP Scan	tjones	\checkmark							
12/20/2012 4:15:05 PM	1	MFP Scan	tjones	\checkmark							
12/20/2012 4:15:05 PM	6	MFP Scan	tjones	\checkmark							
12/20/2012 4:15:11 PM	5	MFP Scan	tjones	\checkmark							
2/20/2012 4:15:12 PM	1	MFP Scan	tjones	\checkmark							
12/20/2012 4:15:12 PM	1	MFP Scan	tjones	\checkmark							
12/21/2012 10:49:04 AM	5	MFP Scan	tjones	\checkmark							

Status Icon	Status Description
	Unknown – The batch is in queue for IQ Smart Indexer. IQ Smart Indexing <i>cannot</i> be performed on the batch.
Z	In Process – IQ Smart Indexer is currently processing the batch. IQ Smart Indexing <i>cannot</i> be performed on the batch.
~	Completed – IQ Smart Indexer has finished processing the batch. IQ Smart Indexing <i>can</i> be performed on the batch.
0	Failed – IQ Smart Indexer has failed for the batch. IQ Smart Indexing <i>cannot</i> be performed on the batch.

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

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

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



Clicking "Yes" will allow the user to proceed with manual indexing, but the "Select" tool will be disabled and IQ Smart Indexing cannot be performed. Clicking "No" will return the user to the Indexing Queue and the IQ Smart Indexer will continue to process the batch. Once the Status is "Completed", the user may re-open the batch and perform IQ Smart Indexing. Once the Status for a batch is "Completed", IQ Smart Indexing can be performed on the batch. To begin IQ Smart Indexing, highlight a batch with a "Completed" Status and double-click it. This will open the main Indexer screen.

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

25 1	ng Mode 🖑 Pan 📴 Select Document Type Select Document Type	Zoom: Entire		Print Smooth Imag	e			-
2 3 4				INVO	DICE	infor softw		
5			REMIT TO: Informa Soft 123 Baker S Orlando, FL	reet	INVOICE NI INVOICE D	UMBER: 8684 ATE: 10/0	170 11/12	
				BILL TO: Big Corp. P.O. Box 102332 Norman, OK 75432	SHIP TO: Big Corp. 345 Oak Parkway Stilwater, OK. 7562	22		
			item #	Description	Quantity	Unit Price	Total	
			76802 76902 PEN100 PEN102	Copy Paper – WHT, LTR Copy Paper – WHT, LEGAL Pen – BLK Pen – BLU	10 10 200 200	25.50 28.00 0.75 0.75	255.00 280.00 150.00 150.00	
	Route To:	_						
		<u>* 5</u>						
	Message:		AMOUNT D	JE			835.00	
	Cancel	ommit						

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

In the drop-down menu, "Document Type," select the document type to designate the first page of the document. For example, as shown on the next 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".

Indexing Queue 🙁								
🗐 <u>C</u> ommit 📃 Training N	1ode 🔚 Pan 📴 Select 🐗 Clo	se 🦻 🧬	•					
Pages	Document Type	Zoom: P	age Width 🔻	Rotate 90° Print Smooth	Image			
2 1 2	Select Document Type 💎							*
3	Client Directory Collections	- 11						
4	Current Real Estate Properties					• r	for the second s	
5	ImageQuest Administrator's Guide Invoice	_		INIV	OICE	infor		
	MFP Scan				OICE	softw	are	
	Receipts		REMIT TO:		INVOICE NUM	IBER: 868	470	
			Informa Softw		INVOICE NOT		01/12	
			123 Baker Stre Orlando, FL 3					=
				BILL TO:	SHIP TO:			
				Big Corp. P.O. Box 102332	Big Corp. 345 Oak Parkway			
				Norman, OK 75432	Stillwater, OK 75622			
			ltem #	Description	Quantity	Unit Price	Total	
			7G802 7G902	Copy Paper – WHT, LTR Copy Paper – WHT, LEGAL	10 10	25.50 28.00	255.00 280.00	
			PEN100	Pen – BLK	200	0.75	150.00	
	Route To:		PEN102	Pen – BLU	200	0.75	150.00	
	- to							
	Message:							
	Cancel Commit							-
Documents: 1								

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

Indexing Queue 🗵					
	Aode 🔚 Pan 📴 Select 🐗 Clo				
Pages	Document Type	Zoom: Entire Page 🝷 F	Rotate 90° Print Smooth Ima	ige	
1 - Invoice	Invoice 👻				
2 3	DocumentGroup				
4	(None) 🔹 🕤		INIV		rma
5	CustomerName		144	soft soft	ware
-	5		REMIT TO: Informa Software	INVOICE NUMBER: 8 INVOICE DATE: 1	68470 0/03/12
			123 Baker Street		
	InvoiceDate		Big Corp.	SHIP TO: Big Corp.	
	* 5		P.O. Box 392332 Norman, OK 75432	345 Oak Parkway Stillwater, OK 75622	
	InvoiceAmount				
	5		Item # Description 	Quantity Unit Price	255.00
			7G902 Copy Paper – WHT, LIK 7G902 Copy Paper – WHT, LEGAL PEN100 Pen – BLK	10 25.50 10 28.00 200 0.75	253.00 289.00 150.00
			PEN102 Pen – BLU	200 0.75	150.00
	Route To:				
	+ 5				
	Message:		AMOUNT DUE		835.00
	÷				
	Cancel Commit				
Documents: 1					

Indexing Queue 🗙								~
🞒 <u>C</u> ommit 🔳 Training M	lode 🔚 Pan 🎦 Select 🐗 Clo	ose 🦻 🖗 🌗						
Pages	Document Type	Zoom: Entire Page 🔻	Rotate 90° P	rint Smooth Image				
📝 1 - Invoice	Invoice 👻		-					
2	DocumentGroup						-	
3	(None) - 5			INVOIO	`с	inforr	na	
5	CustomerName			INVOIC	E	softwa	are	ζ
	Big Corp. 5		REMIT TO: Informa Softwi	are	INVOICE NUM			ĺ l
	big corp.		123 Baker Stre Orlando, FL 33	et.	INVOICE DATE		, a.a.	- A
	InvoiceDate			BILL TO:	SHIP TO:			\geq
	- to			Big Corp. P.O. Box 102332 Norman, OK 75432	Big Corp. 345 Oak Parkway Stillwater, OK 75622			5
	InvoiceAmount			and the second	31111101, DX 73242			
	5		item #	Description	Quantity	Unit Price	Total	Sec. 1
			76802 76902 PEN100	Copy Paper – WHT, LTR Copy Paper – WHT, LEGAL Pen – BLK	10 10 200	25.50 28.00 0.75	255.00 280.00 150.00	<u>></u>
			PEN102	Pen - BLU	200	0.75	150.00	}
								~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
								2
								1
	Poute ToerTo	0				-	<b>.</b>	m
	Route Tom			and the second s		~~		And had

IQ Smart Indexing will then auto tab to the next attribute so the user can continue indexing the document. See below. The user has also populated "InvoiceDate" with "10/1/2012" and is in the process of populating "InvoiceAmount" with "\$835.00".

Indexing Queue 🗙								
🗐 Commit 🔳 Training M	lode 🔚 Pan 🎦 Select 🐗 Clo	se 🤿 🖗 🤚						
Pages	Document Type	Zoom: Entire Page + Ro	otate 90°	Print Smooth Image	e			
📝 1 - Invoice	Invoice 👻							
2	DocumentGroup						~	
4	(None) - t			INVO	ICE	s of tw		
5	CustomerName							
	Big Corp. 5		REMIT TO: Informa Sof 123 Baker S		INVOICE N INVOICE DA		9470 101/12	
	InvoiceDate		Orlando, FL	32810				
	10/1/2012 - 5			BILL TO: Big Corp. P.O. Box 102332	SHIP TO: Big Corp. 345 Oak Parkway			
	InvoiceAmount			Norman, OK 75432	Stilwater, OK 7563	2		
	\$835.00 🛫 5		item #	Description	Quantity	Unit Price	Total	
	,		76802 76902 PEN100	Copy Paper – WHT, LTR Copy Paper – WHT, LEGAL Pen – BLK	10 10 200	25.50 28.00 0.75	255.00 280.00 150.00	
			PEN102	Pen - BLU	200	0.75	150.00	
	Route To:							
	- 5							
	Message:		AMOUNT D	UE			835.00	
	Cancel Commit							
Documents: 1								

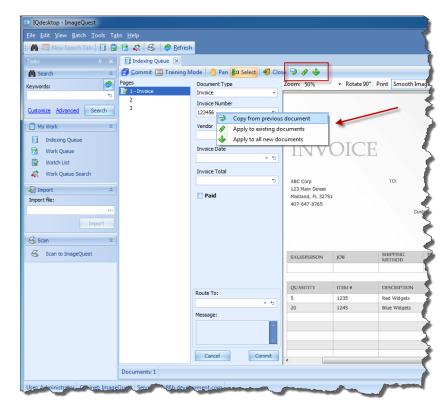
Assign and index additional documents in the batch as needed, and click "Commit" to commit the batch to ImageQuest. Once a batch is committed, the user will return to the Indexing Queue to show the remaining batches to be indexed.

Note: Any combination of IQ Smart Indexing and manual indexing can be performed on the same document if the Status for the batch is "Completed".

# Persistent Attributes during Indexing (Sticky Attributes)

Sticky Attributes allows a user to copy index values from one page of an indexed document and have those index values automatically applied to other pages in the batch so that the can be indexed as separate documents. When a user right-clicks on an index field in the indexing queue, they will be presented with three options. These options are also available as toolbar shortcuts.

•	Copy from previous document	Copies the value of the same attribute name from the previous document
¢	Apply to existing documents	Copies the current attribute value to all other documents currently defined in the batch containing the same attribute
4	Apply to all new documents	Copies the current attribute value to all new documents that will be created in the current batch containing the same attribute



# **PDF Indexing**

The Indexing Queue is able to index PDF files that are imported from IQfolder. There are a few differences when indexing PDF files as opposed to TIF files:

- PDF files may be annotated during indexing using the same annotation toolset found in IQdesktop
- Thumbnail views of all pages in the document are provided
- Pages may be inserted into the current document from existing PDF files stored on disk by right-clicking on any thumbnail

<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>B</u> atch <u>T</u> ools T <u>a</u> l	
Image: Search Table     Image: Search Table       Tasks     Image: Search Table       Image: Search Table     Image: Search Table       Keywords:     Image: Search Table	Image: Construction       Image: Construction       Image: Construction         Document Type       Image: Construction       Image: Construction         Image: Construction       Image: Construction       Image: Construction         Document Type       Image: Construction       Image: Construction         Image: Construction       Image:
Customize     Advanced     Search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of the search     Image: Market of the search     Image: Market of the search       Image: Market of	102 •   Vendor   ABC Corp   Invoice Date   11/25/2012   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1000   1100   1100   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110   1110
User: Administrator Cabinet: Image	Quest Server: 21k3x86b.development.com

The following features are **NOT** available when indexing PDF files in this manner:

- Smart Indexing
- Splitting up pages as different documents
- Training Mode
- Sticky Attributes

Note: The Smart Indexing status of a PDF document will always show up with a gray circle or unknown in the Indexing Queue.

# **Searching for Stored Documents**

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

### **Custom Search Tab**

To initiate a search for documents, click the **Search** icon *i* in the toolbar, use the "Tools" menu to select the **Search** function, or click the "Advanced" link.

😺 IQdesktop - ImageQuest						
<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>Tools</u> T <u>a</u> bs <u>H</u> e	lp					
Tasks Indexing Que Massearch Watch List Keywords:	ueue Ctrl+Q Ctrl+W e Ctrl+R					
Work Queu Manage Do Customize Advanceu Search	cument Types					
	<u>File Edit View Tools Tabs H</u> elp					
My Work *	Image: Second					
🔂 Work Queue	Tasks 🕂 🗙					
Watch List	Keywords: ⊘					
Import *	Keywords:					
Import A	Customize Advanced Search					
	🖺 My Work 🌣					
	<ul> <li>Indexing Queue</li> <li>Work Queue</li> <li>Watch List</li> <li>Work Queue Search</li> <li>Import **</li> </ul>					
	Import					

In the Advanced Search dialogue shown below, all document types are selected by default, so a user can simply enter or select attribute or keyword information and click "Search" to search all documents that meet the criteria. Users can specify which document types to include in a search by checking or unchecking document types from the dropdown list. When a selection is made and the user clicks "OK", the Search window will update to only reflect the attributes shared by the selected document types.

🕅 Search		- • •
Keyword search criteria:		
		6
Custom Search Saved Que	ries	
Document types to include:	Invoice	•
Enter values for any attributes	Appointments	
CreateDateTime	Invoice	
	[™] Main v2	
CustomerName	Patient Health Record	
DocumentGroup		
InvoiceAmount		
InvoiceDate		
	Select All Clear	ОК
PageCount		
	⁺⊃ to	5
Clear		Search Cancel

As shown below, a search is in effect for an InvoiceDate of 10/1/2012. By selecting a single Document Type, the list of all available attributes is changed to reflect only those attributes associated with that Document Type. Click "Search" once the desired index fields are completed.

🕅 Search		2		• •
Keyword search criteria:				
				5
Custom Search Saved Q	ueries			
Document types to include:	Invoice			•
Enter values for any attribut	tes you wish to search	h for:		
DocumentGroup				
	* 5	or		* 5
CustomerName				-
InvoiceDate	5	or		5
10/1/2012	- 💮 to	to		- 🛞 ti
InvoiceAmount	0			
	6	to		5
CreateDateTime		1		_
Prove Count	+ 💮 t	to		• 🞯 5
PageCount	5	to		5
	_	10		
Clear			Search	Cancel

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

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

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

A Search			x
Keyword search criteria:			
			5
Custom Search Saved Queries			_
Document types to include: Invoice			-
Enter values for any attributes you wish to search	for:		1
DocumentGroup	1 .		
	or		2
Atlanta Orlando			
Phoenix 1	or		2
	to	- 🛞 t	
			1
	to		2
CreateDateTime			
PageCount	to	+ (® t	2
5	to	5	
			1
Clear		Search Cancel	

The custom search results are three Invoices with an InvoiceDate of 10/1/2012. The IQ search criteria are displayed in each Search tab so users can see the search criteria used for the displayed results.

😺 IQdesktop - ImageQuest					N						
<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>D</u> ocument <u>T</u> ools	File Edit View Document Iools Tabs Help										
🗄 🕅 🗔 New Search Tab 🛛 🛐 😨 😤 🧔 🖉 Refresh											
Tasks 4 x 🕅 Search 🗴											
🖍 Search 🌣	🎆 Search 🛛 🛪 🗄 📴 🕐 🖵 💾 🧬 👍 🖂 🗽 🤔 🥙 🧟 Orid Edit 🕴 🗐 📾 🐺 🖬 🔐 💩 🤜										
Keywords:	Keywords: OcumentType IN ('Invoice') AND (InvoiceDate = '10/1/2012')										
5	Drag a column header here to group by that column										
Customize Advanced Search	×	1	2	:	CreateDateTime	PageCount	DocumentType	DocumentGroup	CustomerName	InvoiceDate	Invoio
			1		1/2/2013 10:52:22 AM	5	Invoice	Orlando	Big Corp.	10/1/2012	
📋 My Work 🛛 🕆				2	1/2/2013 11:22:30 AM	5	Invoice	Orlando	Test Labs, LLC	10/1/2012	
Indexing Queue				1	1/2/2013 11:23:12 AM	5	Invoice	Orlando	ABC Inc.	10/1/2012	
😚 Work Queue										5	
🕞 Watch List											

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

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

## **Saved Queries Tab**

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

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

🕅 Search	De								
Keyword search criteria:									
			5						
	ed Queries								
Select a saved query to execute:									
Clear		Search	Cancel						

The screenshots below gives an example of a saved query search based on the "InvoiceDate" attribute and its search result.

🕅 Search	
Keyword search criteria:	
	<u>ه</u>
	d Queries
Select a saved query to	execute: InvoiceDate
Enter the InvoiceDate:	10/1/2012 - 🛞 🕤
-	
Clear	Search Cancel

_		= '10/0		🖂 🗽 🔂 🤌 🛽						
_	_			group by that column						
×	1	2		CreateDateTime	PageCount	DocumentType	DocumentGroup	CustomerName	InvoiceDate	Invoice
		2	7	1/2/2013 10:52:22 AM	5	Invoice	Orlando	Big Corp.	10/1/2012	
		7	1	1/2/2013 11:22:30 AM	5	Invoice	Orlando	Test Labs, LLC	10/1/2012	
			14	1/2/2013 11:23:12 AM	5	Invoice	Orlando	ABC Inc.	10/1/2012	

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

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.

## **Keyword Search**

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

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

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

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

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

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

😺 IQdesktop - ImageQuest											
<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>D</u> ocument <u>T</u> ools	; T <u>a</u> bs	<u>H</u> elp									
🕴 🕅 🗔 New Search Tab 📑 🕃	1	<b>R</b>   C	0	<u>R</u> efresh							
Tasks 🕴 🗴 🕅 Search 🗵											
🕅 Search 🔹 📴 🕜 🖵 🔂 🕼 🖂 🗽 🖄 🕼 🖉 🥵 🕼 🖉 🕼 🖂											
Keywords:	Keyw	ords =	"big co	Έ.							
big corp 🕁	Drag	a column	header	here to	group by that column						
Customize Advanced Search	×	1	1		CreateDateTime	PageCount	DocumentType	DocumentGroup	CustomerName	InvoiceDate	InvoiceAn
			2	72	1/2/2013 10:52:22 AM	5	Invoice	Orlando	Big Corp.	10/1/2012	
My Work 🌣				1	1/2/2013 11:22:30 AM	5	Invoice	Orlando	Big Corp.	10/1/2012	
Indexing Queue			1	1	1/2/2013 11:23:12 AM	5	Invoice	Orlando	Big Corp.	10/1/2012	\$1
😚 Work Queue	_										
🕞 Watch List											

## **Customize List**

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

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

Tasks 🗜 🗙		
🕅 Search 🏾 🌣		
Keywords:	Choose Favorite Search Attributes	
<ul> <li>Indexing Queue</li> <li>Work Queue</li> <li>Watch List</li> <li>Work Queue Search</li> </ul>	<ul> <li>Decline (c) per</li> <li>InvoiceAmount</li> <li>InvoiceDate</li> <li>PageCount</li> </ul>	Tasks 🕂 R Search Keywords:
🔊 Import 🛛 🕆		
Import file:		DocumentType
😸 Scan 🔹		÷ 😁 '
💪 Scan to ImageQuest	Clear OK Cancel	Customize Advanced Search

# **Viewing a Document**

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

	earch 💌				[·						
				🖂 🗽 🔁 🖉 🛽	<u>G</u> rid Edit		i i				
		-					_				
	a column h			roup by that column							
×	Ъ	2		CreateDateTime	PageCount	DocumentType	D	ocumentGroup	CustomerName	InvoiceDate	InvoiceAr
		<i>7</i>	2	1/2/2013 10:52:22 AM		Invoice	Þ	<u>V</u> iew	Ctrl+1	/2012	
			<u>권</u> 권	1/2/2013 11:22:30 AM 1/2/2013 11:23:12 AM		Invoice Invoice		Edit	Ctrl+Shift+E	/2012	Ś
		<u>60</u>	~	1/2/2013 11:23:12 AM	5	TINOICE		Annotate		./2012	ş
							R.	Add Revision			
							1	Route			
								Save Local Cor	pv Ctrl+Shift+L		
							-	Export to Folde			
								E <u>m</u> ail Docume	ent Ctrl+M		
							8	Batch Print			
							8	<u>S</u> how Associat	ted Ctrl+O		•
								Find Similar		Res	ults: 3 of 3
Workf	low Histor						Ð	D <u>u</u> plicate	Ctrl+D		
	flow Name		Origin	ator Stati	15	Started		<u>D</u> elete	Ctrl+Alt+D		Exporte
mont	novi Hame	-	ongin	500		Durted	う	Undelete			Exporte
								Watch Docum	ient Ctrl+T		
							8	Stop Watching	a Ctrl+U		

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

-						
Search	🔁 Invoice.pdf - Adobe					
Arrange Windows	File Edit View Wi	ndow Help				<b>*</b>
Looking For:	1 🔁 🥥 🖻 🗎	) 🖨 🖂		75% 👻 🛃 👻	Tools	Sign Comment
big corp in the current document						^
Results:					_ Clic	k on Sign to add text
1 documents with 1 instances						place signature on a File.
New Search					intorn	ng1
	01		INV	OICE	softwa	
Results:						
E-12 C:\U\Invoice.pdf		REMIT TO:		INVOICE NUM		
Big Corp. Big Corp. P.O. Bc		Informa Soft 123 Baker St		INVOICE DATE	10/01/	/12
		Orlando, FL				
			BILL TO:	SHIP TO:		
			Big Corp. P.O. Box 102332	Big Corp. 345 Oak Parkway		
			Norman, OK 75432	Stillwater, OK 75622		
		Item #	Description	Quantity	Unit Price	Total
		7G802	Copy Paper – WHT, LTR	10	25.50	255.00
		7G902 PEN100	Copy Paper – WHT, LEGAL Pen – BLK	10 200	28.00 0.75	280.00 150.00
		PEN102	Pen – BLU	200	0.75	150.00
-						
4						
Collapse file paths						
Show Less Options						
Find a word in the current 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 below. This screen can be customized in a variety of ways by hiding and closing some or all of the panels or by moving the panels to different parts of the screen.

🕼 IQdesktop - ImageQuest											- • ×
<u>File Edit View D</u> ocument <u>T</u> ools	s T <u>a</u> bs	<u>H</u> elp									
👬 🔯 New Search Tab 📑 🕃	1 🔁 🖌	: 6	🥏 <u>R</u> efre	sh							
Tasks 4 🗙	A S	earch 🗙									
Search 🌣	B		380	k 🖂 🗽 😚 🤌	📝 <u>G</u> rid Edit		1 🖶 🕹 🚍 🛛				
Keywords:	Docum	nentType	IN ('Invo	ce') AND (InvoiceDat	e = '10/1/20	12')					
100003. 10	Drag a	a column hea	der here t	o group by that column							
DocumentType	~	1		CreateDateTime	PageCount	DocumentType	DocumentGroup	CustomerName	InvoiceDate	InvoiceAmount	
- + <del>5</del>	^		°		_	5 Invoice	Orlando	Big Corp.	10/1/2012	\$835.00	
InvoiceDate			2 1			5 Invoice	Orlando	Big Corp.	10/1/2012	\$65.00	
			7 1			5 Invoice	Orlando	Big Corp.	10/1/2012	\$1,350.75	
Customize Advanced Search			- 2								
🗂 My Work 🛛 🕆											
Indexing Queue											
🔂 Work Queue											
🚱 Watch List											
Kork Queue Search											
🔊 Import 🔗											
Import file:											
											Results: 3 of 3
Import	Histor	y									÷ ×
	5	D Sho	ow Details								
🗟 Scan 🔹	Action				Event (	Data			User Name		
😸 Scan to ImageQuest	FleVie					13 12:54:52 PM		•	tiones		
	FileVie	2W			1/2/201	13 12:50:35 PM			tjones		
	Save				1/2/201	13 11:34:11 AM			tjones		
	FileVie	w			1/2/201	l3 11:32:16 AM			tjones		
	Save					13 11:07:28 AM			System		-
	Вн	listory 📜	Notes 🛛 🌠	Open Work Items 🏼 🗳	Workflow Histo	ry					
User: tjones Cabinet: ImageQuest	Server:	2k8x64a.de	velopmer	t.com							
,											

To increase screen "real estate", locate the pushpin icons on the "Tasks", "History", and "Notes" panels as highlighted below. 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.

🐼 IQdesktop - ImageQuest
<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>D</u> ocument <u>T</u> ools
🕴 🏠 🗔 New Search Tab 🛛 🛐 🕃
Tasks 🕂 😽 🗶
A Search 🌣
Keywords:
DocumentType
- t
InvoiceDate
- 🕑 ti
Customize Advanced Search

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.

)desktop - ImageQuest														
<u>Edit View D</u> ocument	Tools Tabs Heln								اللغال ا					
	1 🗟 🗟 🦨 🎯	Refresh												
Search 🗙														
12 12 🖵 🗄 🍪 1	👍 🖂 🗽 😫 🖄 🖄 🖉	Grid Edit 🕴 📃 🖼 🕱 🛙	1 🗗 💩											
DocumentType IN ('Invo	oice') AND (InvoiceDate = '	10/1/2012')												
Drag a column header here t	to group by that column													
🗶 📜 🜌 🗉	CreateDateTime Pa	ageCount DocumentType	Doc	🖗 IQdes	ktop -	ImageQue	est							
2 🕺 🎜	1/2/2013 10:52:22 AM	5 Invoice						ools T <u>a</u> bs <u>H</u> elp						
S 🖉 🏂	1/2/2013 11:22:30 AM	5 Invoice	Orlar 🕴											
S 12	1/2/2013 11:23:12 AM	5 Invoice	Orlar		l New	Search Tal	b	🗟 🖻 🤹 😪	Kefresh					
			ē	7 M	Search	×				_				
			0	a 🕴 🚺	2	🤜 🗄 a	8 🕒	🖂 🗽 🔁 🖉 [	🖉 <u>G</u> rid Edit	: 🗆 🖶 🕱 🗂	1 🕂 🕹 🗐 🕇			
				Doc	umenť	Type IN ('	Invoic	e') AND (InvoiceDate	= '10/1/20	12')				
		+						group by that column						
					y a colui									
				×				CreateDateTime	PageCount		DocumentGroup	CustomerName	InvoiceDate	InvoiceAmour
	•					8		1/2/2013 10:52:22 AM		5 Invoice	Orlando	Big Corp.	10/1/2012	\$83
											Orlando	Big Corp.	10/1/2012	\$6
			_ 1				14	1/2/2013 11:22:30 AM 1/2/2013 11:23:12 AM		5 Invoice 5 Invoice	Orlando	Big Corp.	10/1/2012	
History	5													\$1,350
👼  Show Details	s Event (	Date		Hist	ory									\$1,35
	Event	Date 13 12:54:52 PM		Hist	ory									\$1,35
Show Details           Action           FileView	Event [ 1/2/201							1/2/2013 11:23:12 AM			Orlando	Big Corp.		\$1,35
Show Details Action FileView FileView	Event [ 1/2/201 1/2/201	13 12:54:52 PM		Acti	ion			1/2/2013 11:23:12 AM	vent Date	5 Invoice	Orlando	Big Corp.		\$1,35
Show Details Action FileView FileView Save	Event ( 1/2/20 1/2/20 1/2/20	13 12:54:52 PM 13 12:50:35 PM		Acti File	ion /iew			1/2/2013 11:23:12 AM	rent Date 2/2013 12:54:	5 Invoice	Orlando	Big Corp. User Name tjones		\$1,35
Show Details Action FileView FileView Save FileView Save	Event ( 1/2/20) 1/2/20) 1/2/20) 1/2/20) 1/2/20)	13 12:54:52 PM 13 12:50:35 PM 13 11:34:11 AM 13 11:32:16 AM 13 11:07:28 AM		Acti	ion /iew /iew			1/2/2013 11:23:12 AM	/ent Date 2/2013 12:54: 2/2013 12:50:	5 Invoice 52 PM 35 PM	Orlando	Big Corp. User Name tjones tjones		\$1,35
Show Details Action FileView Save FileView Save Save	Event [ 1/2/20] 1/2/20] 1/2/20] 1/2/20]	13 12:54:52 PM 13 12:50:35 PM 13 11:34:11 AM 13 11:32:16 AM 13 11:07:28 AM		Acti File	ion /iew /iew e			1/2/2013 11:23:12 AM	rent Date 2/2013 12:54:	5 Invoice 52 PM 33 PM 11 AM	Orlando	Big Corp. User Name tjones		\$1,35
Show Details Action FileView Save FileView Save @ History 2 Notes 2	Event 1 1/2/201 1/2/201 1/2/201 1/2/201 1/2/201 2/200 2/ Workflow History 2/ Oper	13 12:54:52 PM 13 12:50:35 PM 13 11:34:11 AM 13 11:32:16 AM 13 11:07:28 AM 1 Work Items		Acti File File Save	ion /iew /iew e /iew			1/2/2013 11:23:12 AM	rent Date 2/2013 12:54: 2/2013 12:50: 2/2013 11:34:	5 Invoice 52 PM 35 PM 11 AM 16 AM	Orlando	Big Corp. User Name tjones tjones		\$1,35
Provide a constraint of the constraint of t	Event ( 1/2/20) 1/2/20) 1/2/20) 1/2/20) 1/2/20)	13 12:54:52 PM 13 12:50:35 PM 13 11:34:11 AM 13 11:32:16 AM 13 11:07:28 AM 1 Work Items		Acti FileV FileV Save	ion /iew /iew e /iew			1/2/2013 11:23:12 AM	vent Date 2/2013 12:54: 2/2013 12:50: 2/2013 11:34: 2/2013 11:32:	5 Invoice 52 PM 35 PM 11 AM 28 AM	Orlando	Big Corp. User Name tiones tiones tiones tiones		\$1,35
Provide a constraint of the constraint of t	Event 1 1/2/201 1/2/201 1/2/201 1/2/201 1/2/201 2/200 2/ Workflow History 2/ Oper	13 12:54:52 PM 13 12:50:35 PM 13 11:34:11 AM 13 11:32:16 AM 13 11:07:28 AM 1 Work Items		Acti File\ Save Save	ion /iew /iew e /iew e			1/2/2013 11:23:12 AM	rent Date 2/2013 12:54: 2/2013 12:50: 2/2013 11:34: 2/2013 11:32: 2/2013 11:32:	5 Invoice 52 PM 33 PM 11 AM 16 AM 28 AM 28 AM	Orlando	Big Corp. User Name tjones tjones tjones tjones System		\$1,35
Provide a constraint of the constraint of t	Event 1 1/2/201 1/2/201 1/2/201 1/2/201 1/2/201 2/200 2/ Workflow History 2/ Oper	13 12:54:52 PM 13 12:50:35 PM 13 11:34:11 AM 13 11:32:16 AM 13 11:07:28 AM 1 Work Items		Acti File Save Save Save	ion /iew /iew e fiew e			1/2/2013 11:23:12 AM	rent Date 2/2013 12:54: 2/2013 12:50: 2/2013 11:34: 2/2013 11:32: 2/2013 11:07: 2/2013 11:07:	5 Invoice 52 PM 33 PM 11 AM 16 AM 28 AM 19 AM	Orlando	Big Corp. User Name tjones tjones tjones tjones System System		\$1,350
Provide a constraint of the constraint of t	Event 1 1/2/201 1/2/201 1/2/201 1/2/201 1/2/201 2/200 2/ Workflow History 2/ Oper	13 12:54:52 PM 13 12:50:35 PM 13 11:34:11 AM 13 11:32:16 AM 13 11:07:28 AM 1 Work Items		Acti File Save File Save Save Save	ion /iew /iew /iew /iew /iew			1/2/2013 11:23:12 AM	rent Date 2/2013 12:54: 2/2013 12:50: 2/2013 11:34: 2/2013 11:27 2/2013 11:27 2/2013 11:07: 2/2013 11:07:	5 Invoice 52 PM 52 PM 53 PM 11 AM 16 AM 28 AM 28 AM 19 AM 05 AM	Orlando	Big Corp. User Name tjones tjones tjones System System		\$1,350
Provide a constraint of the constraint of t	Event 1 1/2/201 1/2/201 1/2/201 1/2/201 1/2/201 2/200 2/ Workflow History 2/ Oper	13 12:54:52 PM 13 12:50:35 PM 13 11:34:11 AM 13 11:32:16 AM 13 11:07:28 AM 1 Work Items		Acti FileV FileV Save Save FileV FileV	ion /iew e /iew /iew /iew /iew			1/2/2013 11:23:12 AM	rent Date 2/2013 12:54 2/2013 12:50: 2/2013 11:34: 2/2013 11:07: 2/2013 11:07: 2/2013 11:07: 2/2013 11:06:	5 Invoice 52 PM 35 PM 11 AM 16 AM 28 AM 28 AM 28 AM 28 AM 50 AM 52 AM	Orlando	Big Corp. User Name tiones tiones tiones System System System		\$1,350
Provide a constraint of the constraint of t	Event 1 1/2/201 1/2/201 1/2/201 1/2/201 1/2/201 2/200 2/ Workflow History 2/ Oper	13 12:54:52 PM 13 12:50:35 PM 13 11:34:11 AM 13 11:32:16 AM 13 11:07:28 AM 1 Work Items		Acti FileV FileV Savv Savv Savv FileV FileV Rev	ion /iew /iew /iew e e /iew /iew /iew			1/2/2013 11:23:12 AM	rent Date 2/2013 12:564 2/2013 12:561 2/2013 11:34: 2/2013 11:37: 2/2013 11:07: 2/2013 11:07: 2/2013 11:06: 2/2013 11:05:	5 Invoice 52 PM 33 PM 11 AM 16 AM 28 AM 28 AM 19 AM 05 AM 52 AM 52 AM	Orlando	Big Corp. User Name tiones tiones tiones System System System System tiones		so. \$1,350 #
Provide a constraint of the constraint of t	Event 1 1/2/201 1/2/201 1/2/201 1/2/201 1/2/201 2/200 2/ Workflow History 2/ Oper	13 12:54:52 PM 13 12:50:35 PM 13 11:34:11 AM 13 11:32:16 AM 13 11:07:28 AM 1 Work Items		Acti File Save File Save Save File Rev Save Save Save Save Save Save	ion /iew /iew /iew e e /iew /iew /iew			1/2/2013 11:23:12 AM	vent Date 2/2013 12:54: 2/2013 12:50: 2/2013 11:34: 2/2013 11:32: 2/2013 11:07: 2/2013 11:07: 2/2013 11:07: 2/2013 11:05: 2/2013 11:05:	5 Invoice 52 PM 33 PM 11 AM 16 AM 28 AM 28 AM 19 AM 05 AM 52 AM 52 AM	Orlando	Big Corp. User Name tjones tjones tjones tjones System System System System System tjones tjones		\$1,350
Provide a constraint of the constraint of t	Event 1 1/2/201 1/2/201 1/2/201 1/2/201 1/2/201 2/200 2/ Workflow History 2/ Oper	13 12:54:52 PM 13 12:50:35 PM 13 11:34:11 AM 13 11:32:16 AM 13 11:07:28 AM 1 Work Items		Acti FileV Savv FileV Savv FileV Rev Savv FileV	ion /iew /iew /iew e e /iew /iew /iew	Show D	etails	1/2/2013 11:23:12 AM	rent Date 2/2013 12:543 2/2013 12:543 2/2013 11:34 2/2013 11:37 2/2013 11:07 2/2013 11:07 2/2013 11:05 2/2013 11:05 2/2013 11:05 2/2013 10:56	5 Invoice 5 PM 5 PM 11 AM 16 AM 28 AM 28 AM 28 AM 5 AM 5 2 AM 5 2 AM 5 2 AM 5 3 AM	Orlando	Big Corp. User Name tjones tjones tjones tjones System System System System System tjones tjones		\$1,350

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

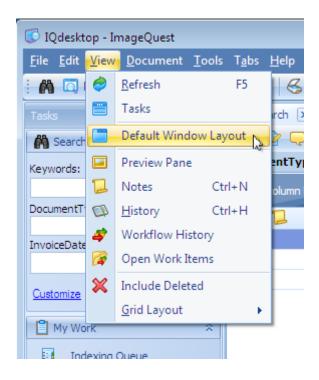
On the following page, the "History" panel is moved to next to the "Notes" panel.

: 10	earch D		O R	🖂 🗽 🔁 💋 🗵	Grid Edit 13					
				) AND (InvoiceDate						
Drag a	a column	header h	nere to g	group by that column						
×	1	2		CreateDateTime	PageCount	DocumentType	DocumentGroup	CustomerName	InvoiceDate	InvoiceAmount
		8	1	1/2/2013 10:52:22 AM	5	Invoice	Orlando	Big Corp.	10/1/2012	\$835.0
		2	1	1/2/2013 11:22:30 AM	5	5 Invoice	Orlando	Big Corp.	10/1/2012	\$65.0
		2	1	1/2/2013 11:23:12 AM	5	5 Invoice	Orlando	Big Corp.	10/1/2012	\$1,350.75
	¢									>
Notes										
										Results: 3 of 3
							Show Details	X		Results: 3 of 3
Notes		Vorkfi	ow Histo	yry i 😵 Open Work Iter	ns	Action Ev FileVie	Show Details	X		Results: 3 of 3
Notes	lotes 🛓			ory i 🛜 Open Work Iter		Action Ev FileVie //2 Save 1/2 FileView 1/2	Show Details ren V User Na 2/2013 tjones 2/2013 tjones			Results: 3 of 3

The result of this move is shown below.

e <u>E</u> dit	⊻iew	Docum	nent <u>I</u>	ools T <u>a</u> bs <u>H</u> elp							
n 🗔	New Se	arch Ta	b 📑	1 🗟 🚓 🖂	🥏 <u>R</u> efresh						
A s	Search (	x			_						
			a R	🖂 🗽 🔁 🖻	Grid Edit			83			
				e') AND (InvoiceDate							
					- 10/1/2012	. )					
Drag	a column	header	here to	group by that column							
×	1			CreateDateTime	PageCount	DocumentT	ype Do	ocumentGroup	CustomerName	InvoiceDate	InvoiceAmount
		1		1/2/2013 10:52:22 AM	5	Invoice	Or	lando	Big Corp.	10/1/2012	\$835
		1	1	1/2/2013 11:22:30 AM	5	Invoice	Or	lando	Big Corp.	10/1/2012	\$65
		-									
		<i>.</i>	14	1/2/2013 11:23:12 AM	5	Invoice	Or	lando	Big Corp.	10/1/2012	\$1,350
		-		1/2/2013 11:23:12 AM	5	Invoice	Or	lando	Big Corp.	10/1/2012	
Notes	5	-	12	1/2/2013 11:23:12 AM		Invoice	Or	lando	Big Corp.	10/1/2012	Results: 3 of
Notes	5	-		1/2/2013 11:23:12 AM				lando		10/1/2012	Results: 3 of
Notes	5	-		1/2/2013 11:23:12 AM		- <b>Ф X</b>	History	Show Det		10/1/2012	Results: 3 of
Notes	5	-		1/2/2013 11:23:12 AM		- <b>Ф X</b>	History	Show Det	ails	V User Nam	Results: 3 of
Notes	5	-		1/2/2013 11:23:12 AM		- <b>Ф X</b>	History	Show Det	ails Event Date	▼ User Nam M tjones	Results: 3 of
Notes	3	-		1/2/2013 11:23:12 AM		- <b>Ф X</b>	History	Show Det	ails Event Date 1/2/2013 12:54:52 P	▼ User Nan M tjones M tjones	Results: 3 of
Notes	5	-		1/2/2013 11:23:12 AM		- <b>Ф X</b>	History Action FileView FileView	Show Det	ails Event Date 1/2/2013 12:54:52 F 1/2/2013 12:50:35 F	▼ User Nan M tjones M tjones M tjones	\$1,350 Results: 3 of
Notes	3	-		1/2/2013 11:23:12 AM		- <b>Ф X</b>	History Action FileView FaleView Save	Show Det	ails Event Date 1/2/2013 12:54:52 F 1/2/2013 12:50:35 F 1/2/2013 11:34:11 A	V User Nam V tjones M tjones M tjones M tjones M tjones M tjones	Results: 3 of

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



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

# **Preview Pane**

Beginning with version 11.0, the IQdesktop client now has an additional image preview pane that lets you see the document within the client without launching the associated application. ImageQuest uses built in Windows Preview Handlers, the same technology that Microsoft Windows Explorer and Microsoft Outlook use, in order to render the preview pane. The following file types should preview in IQdesktop without the need to install additional software: .bmp, .jpg, .rtf, .txt, and .tif. Additional preview handlers can be installed as well in order to preview other file types. Installing Microsoft Office 2007 or 2010 will activate previews for .doc, .docx, .xls, .xlsx, .ppt, and .pptx while installing Adobe Reader 9, 10 or 11 will activate .pdf files.

The example on the next page highlights the preview pane for a selected document.

ile <u>E</u> dit ⊻iew <u>D</u> ocument <u>T</u> ools	s T <u>a</u> bs <u>I</u>	<u>H</u> elp											
🖍 🗔 New Search Tab 📑 🕃	1 🔁 🧔	6	<u>R</u> efresh										
īasks ₽ 🗴	A Sea	irch 🗙											
🐴 Search 🛛 🕆		2 🖵 💾 (	8 🖡	🖂 🖹 🔁 💋	🥂 🧭 🗹	lit 📄 📑 😽 🛛	1 🗗 🖓 🗐						
eywords:	Docume	entType IN (	Invoic	e') AND (InvoiceD	ate = '10/1/	2012')				review		ų.	. :
	Drag a c	olumn header	here to	group by that columr					- Ir				٦
ocumentType	×			CreateDateTime	PageCou	Int DocumentType	DocumentGroup	CustomerName	Ir		INVOICE	informa	
★ 5	~		1	1/2/2013 10:52:22		5 Invoice	Orlando	Big Corp.	10	MANY VIE Information 2019 Restor Street Orientis, FL X800	84001 84001	NUMBER BARTS	
nvoiceDate			Â	1/2/2013 11:22:30		5 Invoice	Orlando	Big Corp.	10	Marken Marken F.S. No 10040 Harken, CK. (1940)	teratrino Naj temp. 243 Elit Parlamia Differentes, DC 70		
			1	1/2/2013 11:23:12	AM	5 Invoice	Orlando	Big Corp.	10	North Gauciptice Teleff Copy Taple - MrA. 178 TRUE Copy Taple - MrA. 178 TRUE Copy Taple - MrA. 159 TRUE Copy Taple - MrA. 159	6000) 6	140 Pile Tani D.M. 2008 308 3008 519 3008	
Customize Advanced Search										HINGS Pro-BE	10	11 108 13 108	
🖹 My Work 🔗													
Indexing Queue													
Work Queue													
Mork Queue													
Pk Watch Lint										and out that		10.0	
Watch List										sabowi ind		86.00	
Watch List       Work Queue Search										action ind		88.08	_
🧔 Work Queue Search	•								Þ		INVOICE	informa	_
Work Queue Search	•				III			Results: 3 of	3	Barrier Salves (March 2) Barris Salve Orean 6, 13 Salve	INVOICE		_
Work Queue Search	Notes					History		Results: 3 of			INVOICE motors with the motors for the formation	softwore	_
Work Queue Search	Notes						v Details			BANY IN Salara (Mara) 12 Bana San Orana 1, 13 Bar	INVOICE INVOIC INTO INTO INTO INTO INTO INTO INTO INTO	softwore	_
Work Queue Search	<ul> <li>Notes</li> </ul>				⊟ ∓ ×	r 🐌 🥻 Show				MARTE Biologia Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status S	model model of support for the basis forward for the basis forward for the basis	SOFTWORD	
Work Queue Search Work Oueue Search Import file: Import Scan	Notes				⊟ ∓ ×	🍒 ছ Show		C #		MARTE Biologia Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status S	model model of support for the basis forward for the basis forward for the basis	SOFTWORD	_
Work Queue Search	Notes				⊟ ∓ ×	Action FileView	Event Date 🛛 🔻	User Name tjones		MARTE Biologia Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status S	model model of support for the basis forward for the basis forward for the basis	SOFTWORD	_
Work Queue Search Work Dueue Search Import file: Import file: Scan	Notes				⊟ ∓ ×	Action FileView FileView Save	Event Date  V 1/2/2013 12:54:5 1/2/2013 12:50:3 1/2/2013 11:34:1	User Name tjones tjones tjones		MARTE Biologia Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status S	model model of support for the basis forward for the basis forward for the basis	SOFTWORD	_
Work Queue Search	Notes				⊟ ∓ ×	Action FileView FileView Save FileView	Event Date V 1/2/2013 12:54:5 1/2/2013 12:50:3 1/2/2013 11:34:1 1/2/2013 11:32:1	User Name tjones tjones tjones tjones		MARTE Biologia Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status S	model model of support for the basis forward for the basis forward for the basis	SOFTWORD	
Work Queue Search	Notes				⊟ ∓ ×	Action FileView FileView Save FileView Save Save	Event Date  V 1/2/2013 12:54:5 1/2/2013 12:50:3 1/2/2013 11:34:1 1/2/2013 11:32:1 1/2/2013 11:07:2	User Name tjones tjones tjones tjones System		MARTE Biologia Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status S	mucces mucces and mapping star franchistor formas, FL BERRI formas, FL BERRI	SOFTWORD	
Work Queue Search				ory 👔 Open Work	Add Note	Image: Show         Show           Action         FleView           FileView         Save           FileView         Save           Save         Save	Event Date V 1/2/2013 12:54:5 1/2/2013 12:50:3 1/2/2013 11:34:1 1/2/2013 11:32:1	User Name tjones tjones tjones System System		MARTE Biologia Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status S	mucces mucces and mapping star franchistor formas, FL BERRI formas, FL BERRI	50110010 MMM 600 000 000 000 000 000 000 000	of

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

Note: As of ImageQuest 11.3, the Preview Pane is also available from the Indexing Queue. It is disabled by default and can be turned on by using the 💷 button on the toolbar.

# **Column Customization**

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

	CreateD	PageCount	Docume	Indexi 🔺	MfpInpu	MfpAddr	MfpDispl	MfpHost	MfpSerial
--	---------	-----------	--------	----------	---------	---------	----------	---------	-----------

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

<b>M</b> s	earch (	x														
D		2 🖪	8 B			1 10 12 19	id Edit	: 8 8	<b>x</b> 1	<b>#</b> 💩	=					
ocu	mentTy	ype IN (	Invoid	e') AN	ID (Invo	iceDate = '	10/1/201	12')								
rag	a column	n header	here to	group	by that c	olumn		_			-	Ļ				
κ.	1			Crea	ateDateTi	me	ageCount	Docume	entType	Documen	tGroup	CustomerNar	ne Invoice	ate In	voiceAmount	
		2	1	1/2/2	2013 10:	52:22 AM		5 Invoice		Orlando	Crea	Contraine	10/1/20	12	\$835	.00
		1	1	1/2/2	2013 11:2	22:30 AM		5 Invoice		Orlando		Big Corp.	10/1/20:	12	\$65	.00
	<u> </u>		arch 🗙											-		
			2 📿	8	9 🕒	🖂 🖹 🗄	3 🔌 🛛	🖌 <u>G</u> rid Ed	lit 🗄 🗐			6				
	1	Docume	entTyp	e IN ('	Invoice	) AND (Inv	oiceDate	= '10/1/	2012')							
		Drag a c	olumn h	eader l	here to g	roup by that	column									
		×	1	1		PageCount	Docum	entType	Documer	ntGroup	CreateD	ateTime	CustomerNam	e Invo	oiceDate 1	invoiceAm
				R	2		5 Invoice		Orlando		1/2/2013	3 10:52:22 AM	Big Corp.	10/1	/2012	
				7	1		5 Invoice		Orlando		1/2/2013	3 11:22:30 AM	Big Corp.	10/1	/2012	
				2	2		5 Invoice		Orlando		1/2/2013	3 11:23:12 AM	Big Corp.	10/1	/2012	\$1

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

			e') AND (Invoi	ceDate = '10/1/:	2012')				
			PageCount	DocumentType	DocumentGroup	CreateDateTime	CustomerName	InvoiceDate	InvoiceAmount
	2	74	5	Invoice	Orlando	1/2/2013 10:52:22 AM	Big Corp.	10/1/2012	\$835.0
	2	1	5	Invoice	Orlando	1/2/2013 11:22:30 AM	Big Corp.	10/1/2012	\$65.0
	2	2	5	Invoice	Orlando	1/2/2013 11:23:12 AM	Big Corp.	10/1/2012	\$1,350.7
					Docum	*Xerosp			

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

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

	🕅 Search 🗵										
Docu	DocumentType IN ('Invoice') AND (InvoiceDate = '10/1/2012')										
Drag a column header here to group by that column											
×	12				DocumentType Invoice	CreateDateTime 1/2/2013 10:52:22	Z	. Sort Ascending . Sort Descending	InvoiceAmount \$835.00		
			권	-	Invoice Invoice	1/2/2013 11:22:30 1/2/2013 11:23:12		Clear Sorting	\$65.00 \$1,350.75		
								Group By This Column			
							Ē	Remove This Column			
							<b></b>	Best Fit Best Fit (all columns)			
							Y	Filter Editor Show Find Panel			
Notes						а Ф 3		Show Auto Filter Row			

The "Customization" window will open. As demonstrated 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, "DocumentGroup", is returned to the header.

	D D Q ☐ B C A A C A C A C A C A C A C A C A C A									
Drag a column header here to group by that column										
×	1			PageCount	DocumentType	CreateDateTime	CustomerName	InvoiceDate	InvoiceAmount	
		8	1	5	Invoic Document of	P#P/21 52:22 AM	Big Corp.	10/1/2012	\$835.00	
		1	1		Invoice	1/2/2013 11:22:30 AM	Big Corp.	10/1/2012	\$65.00	
			1	5	Invoice	1/2/2013 11:23:12 AM	Big Gorp.	10/1/2012	\$1,350.75	
	Customization DocumentGroup									

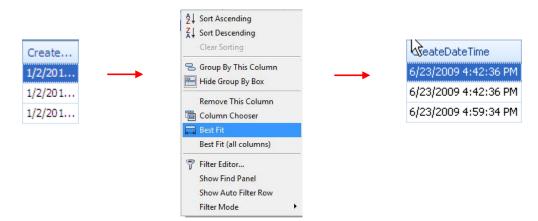
Columns can also be narrowed or widened depending on how much column space you require for any column displayed as demonstrated below. To narrow or widen a column, position the mouse across the line dividing the two columns until you see  $\longleftrightarrow$  and left-click and drag, moving to the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

As	earch 👂	<							
: D	2 🔍	8	9 🕒	🖂 🗽	12 🤌 🔁	🖁 <u>G</u> rid Edit [			
Docum	DocumentType IN ('Invoice') AND (InvoiceDate = '10/1/2012								
Drag a column header here to group by that column									
×	1	2		CreateDa	teTime	PageCount			
		2	72	1/2/2013	10:52:22 AM	5			
		7	1	1/2/2013	11:22:30 AM	5			
		7	1	1/2/2013	11:23:12 AM	5			
					•				
					-				

A Search 💌									
i 🗈 🖄 🤜 💾 😓 🖬 🖾 😫 💋									
DocumentType IN ('Invoice') AND (InvoiceDate = ':									
Drag a	column	header l	here to g	group by tha	t column				
×	1	8		Create	PageCount				
		2	2	1/2/201	5				
			1	1/2/201	5				
			1	1/2/201	5				

### **Best Fit**

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



## Sorting

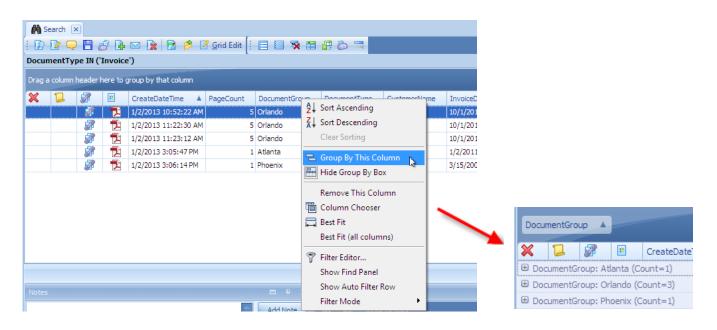
Sorting can be performed on any displayed column in ascending or descending order. There are two ways to define the sort option: 1) click on the header as targeted below to display the results in ascending or descending order; 2) right-click on the column header of the column to open the header menu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

Search ×								
Drag a column	header here to	group by	that column					
PageCount	CreateDateTin	e 🔺	DocumentTyp					
3	6/23/2009 4:4:	2:36 PVI	Invoice					
3	6/23/2009 4:42	2:36 PM	Invoice					
7	6/23/2009 4:59	9:34 PM	Invoice					

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

## Grouping

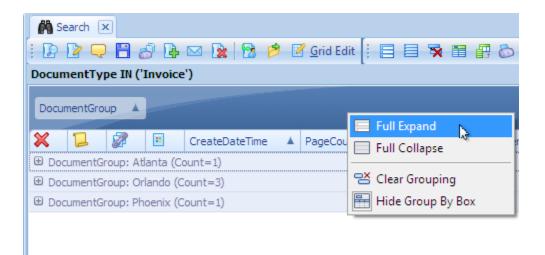
IQdesktop allows for the grouping of one or more columns which allows for a different view of the grid. It also shows a row count associated with each attribute value. There are two ways to group columns: 1) right-click on the column header intended for grouping; this will open the header menu as displayed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



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

Search 🗵									
🗄 🕑 📝 🤤 🖺 🧬 📴 🙀 🖄 🤔 🤔 🖉 Grid Edit [ 🗄 🚍 🐺 📰 🔐									
Docu	DocumentType IN ('Invoice')								
DocumentGroup									
				the second s		~			
×	1			CreateDateTime	PageCount	DocumentType	Cu		
¥ ⊕ Do	CumentG	roup: A		CreateDate Nmc			Cu		
·			tlanta (C				Cu		
⊕ Do	cumentG	roup: O	tlanta (C rlando (C	Count=1)			Cu		

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



#### Note: To clear the contents of the Group By Box, right-click anywhere in the box and select Clear Grouping.

#### **Filters**

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

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

InvoiceDate	PageCoupt
6/22/2009	(Custom) (Blanks)
19/2009	(Non blanks)
/19/2009	5/19/2009 📐
5/19/2009	5/25/2009 W
/25/2009	6/22/2009
,20,200,	

The bottom of the grid now displays the applied filter,  $\frac{5}{19}/2009'$  to the column, "InvoiceDate", as shown on the previous page. To cancel the filter, simply click on the  $\times$  to the left of the filter.

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

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

Custom AutoFilter		×
Show rows where:		
InvoiceAmount		
is greater than or equal to	→ 🖸 Field 500	
And ○ Or		
L N	✓ □ Field	
	OK Cancel	

## **Save Layout**

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

	🗊 IQdeskt	op - Iı	mageQuest							
	<u>F</u> ile <u>E</u> dit	<u>V</u> iew	<u>D</u> ocument <u>T</u>	ools	T <u>a</u> bs	<u>H</u> elp				
	i 🕅 🗔 I	🥏	<u>R</u> efresh		F5	18	0	<u>R</u> efresh		
ľ	Tasks		Tasks			rch 🛛	×			
	A Search		Default Windo	w Layo	out			3 B	🖂 🗽	1
	Keywords:		Preview Pane			entTy	pe IN ('	Invoice	)	
		1	Notes	Ctrl	+N	olumn	header l	here to g	roup by tha	t column
	DocumentT		<u>H</u> istory	Ctrl	+H		2		CreateDate	eTime
	InvoiceDate	4	Workflow Histo			1	1/2/2013 1	0:52:22 A		
		<b>F</b>	Open Work Ite	ms			2	2	1/2/2013 1	1:22:30 A
	Customize	×	Include Deleted	d		-			1/2/2013 1	
			<u>G</u> rid Layout			æ	Save L	ayout	Ctrl+L	6:14 PN
	My Wo	rk		~		<u>a</u>	Restor	e La <u>y</u> out		
	🛐 Ind	lexing	Queue			Eorget Saved Layout				
	- W-	-l. O								

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 below. For example, the outlined document in this figure has a note. When a note is entered for a specific document, the licen 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 1/2/2013 at 3:19:41 PM by the User "tjones". 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.

ray a	column	header l	here to g	group by that column	PageCount	DocumentType
~	1	2	1	1/2/2013 10:52:22 AM	-	Invoice
			1	1/2/2013 11:22:30 AM	5	Invoice
			1	1/2/2013 11:23:12 AM	5	Invoice
		1	1	1/2/2013 3:05:47 PM	1	Invoice
			1	1/2/2013 3:06:14 PM	1	Invoice
lotes						- + x
lotes						C + ×

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.

#### **Edit a Document**

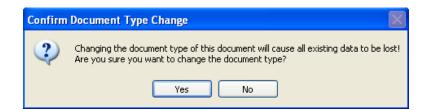
To edit a document, right-click on the highlighted document and select **Edit** from the drop-down menu as demonstrated below. You may also use the toolbar icon or the Document menu.

<b>M</b> s	Rearch X												
: D	2 🤤	) 🗄 a	9 🕒	🖂 🗽 🔁 💈	Grid Edit		×	🛅 🖶 💩 🧮					
Docu	mentTy	pe IN ('	Invoice	e')									
Drag	a column	header l	nere to g	group by that column									
×	1	1		CreateDateTime	PageCount	Docume	entTyp	e DocumentGroup	Customer	lame Invoice	eDate In	voiceAmount	
		8	2	1/2/2013 10:52:22 AM	5	Invoice	P	View	Ctrl+I	10/1/20	012	\$835.00	
		7	2	1/2/2013 11:22:30 AM	5	Invoice		-		10/1/20	012	\$65.00	
		A	Z	1/2/2013 11:23:12 AM	5	Invoice	12	Edit	Ctrl+Shift+E	10/1/20	012	\$1,350.75	
		1	2	1/2/2013 3:05:47 PM		Invoice		Annotate		1/2/20		\$500.00	
		1	7	1/2/2013 3:06:14 PM	1	Invoice	4	Add Revision		3/15/20	800	\$6.00	
							1	Route					
							H	Save <u>L</u> ocal Copy	Ctrl+Shift+L				
							1	Export to Folder					
								E <u>m</u> ail Document	Ctrl+M				
							8	Batch Print					
							7	Show Associated	Ctrl+O			Results	s: 5 of 5
Notes	_					-		Find Similar					4 х
Notes	;						Ð	D <u>u</u> plicate	Ctrl+D			_	
					<b>—</b>	Add		<u>D</u> elete	Ctrl+Alt+D				
1/2/2	013 3:19	•41 PM	tione				5	Undelete		2	V User N		^
				s d - outstanding balance u	updated			Watch Document	Ctrl+T	: 19:41 PM	tjones		
							_	_		19:41 PM	tjones		
							6	Stop Watching	Ctrl+U	.2:54:52 PM	tjones		

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

📝 Edit Document	
Document Type:	Invoice 🔹
DocumentGroup	
Orlando	÷ •
CustomerName	
Big Corp.	5
InvoiceDate	
10/1/2012	* 5
InvoiceAmount	
\$835.00	5
Notes Route	
	Save Cancel

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



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

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

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

A S	earch 🔉	<								
: 12	2 🔍	8	3 🖡	🖂 🗽 🔁 🔀 🗹 <u>G</u> rid	l Edit 🕴 📃 📃	🕱 🗃 🛃 💩 🚍	1			
Docur	nentTy	pe IN (	Invoice	📝 Multiple Document E						
Drag a	a column l	header	here to g							
×	Check the attributes you wish to update, then enter new values.									
		8					p	CustomerNa Big Corp.		
		8		DocumentGroup	(None)	÷ 5		Big Corp.		
		8	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	CustomerName		÷		Big Corp.		
		8	1	☑ InvoiceDate	1/2/2013	* <b>5</b>		GB Graphics		
		7	1	InvoiceAmount		÷		Fun 2 Run		
Notes										
Notes				Notes						
						-	how	Details		
						÷		Event Da		
					Updat	ce Cancel		1/2/2013		
					Opdat	Cancel		1/2/2013		
			L			C		1/2/2013		

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

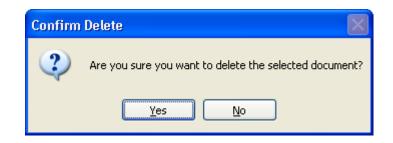
	Search (		-9 Pa	🖂 😼 🕅 🤌 🗗	Grid Edit					
E De DecumentType IN ('Invoice')										
Drag	a column	header	here to g	group by that column						
×	1	8		CreateDateTime	PageCount	DocumentType	DocumentGroup	CustomerName	InvoiceDate	InvoiceAmount
	1	2	14	1/2/2013 10:52:22 AM	5	Invoice	Orlando	Big Corp.	10/1/2012	\$835.00
		1	1	1/2/2013 11:22:30 AM	5	Invoice	Orlando	Big Corp.	10/1/2012	\$65.00
		1	1	1/2/2013 11:23:12 AM	5	Invoice	Orlando	Big Corp.	10/1/2012	\$1,350.75
		1	1	1/2/2013 3:05:47 PM	1	Invoice	Atlanta	GB Graphics	1/2/2011	\$500.00
		1	1	1/2/2013 3:06:14 PM	1	Invoice	Phoenix	Fun 2 Run	3/15/2008	\$6.00

#### **Delete or Undelete Documents**

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

<u>File E</u> dit <u>V</u> iew		ument <u>T</u> ools T <u>a</u> bs		
new Si	• 12	View	Ctrl+I	fresh
Tasks		Edit	Ctrl+Shift+E	
A Search	Q	Annotate		🕞 🖂 🗽 😚 🤌 🖉 Grid Edit 🕴 🚍 🚍 🕱
Keywords:	•	Add Revision		voice')
veywords:	1	Route		e to group by that column
DocumentType	B	Save <u>L</u> ocal Copy	Ctrl+Shift+L	
	1	Export to Folder		CreateDateTime A PageCount DocumentType
invoiceDate		Email Document	Ctrl+M	1/2/2013 10:52:22 AM         5         Invoice           1/2/2013 11:22:30 AM         5         Invoice
	æ	Batch Print		1/2/2013 11:22:10 AM         5 Invoice           1/2/2013 11:23:12 AM         5 Invoice
<u>Customize</u> <u>Advar</u>	-		Ctrl+O	1/2/2013 3:05:47 PM 1 Invoice
Mv Work	8	Show Associated		1/2/2013 3:06:14 PM 1 Invoice
	Ð	D <u>u</u> plicate	Ctrl+D	
Indexing (		Delete	Ctrl+Alt+D	
🐕 🛛 Work Que	3	Undelete		
💱 🛛 Watch Lis		Watch Document	Ctrl+T	
🧟 🛛 Work Que	B	Stop Watching	Ctrl+U	
Import	_	*		_

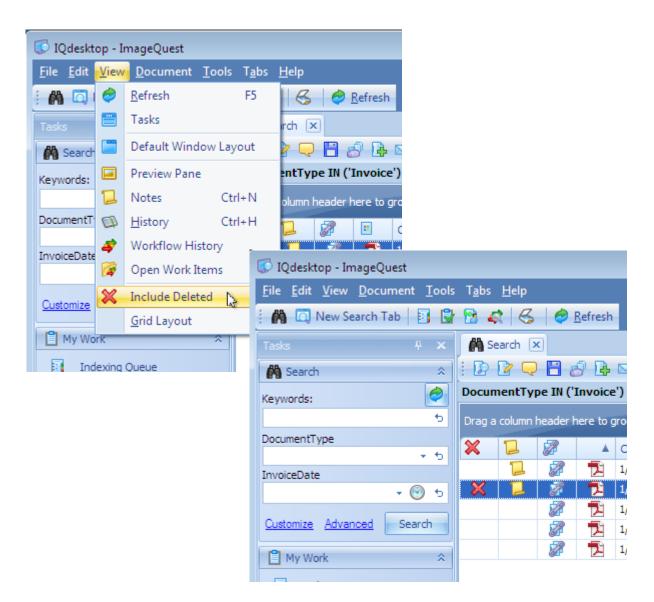
The "Confirm Delete" window appears to ensure that the user desires to delete the selected document as shown on the next page; click "Yes" to proceed.



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

A Search ×									
i 🕑 🕜 💾 📴 🖂 😫 🤌 🏷 🗹 grid Edit [ i 🚍 🚍 🐺 📰 🔐 🧮									
DocumentType IN ('Invoice')									
Drag a r	📮 Enter a Note								
×				Time	InvoiceAmount	DocumentGroup			
	You must enter a n deleting these doc	ote explaining why you are uments.		1:24:14 PM	15150.53	ORL			
	_			1:42:36 PM	15150.54	ORL			
	Duplicate invoice			1:42:36 PM	4236.19	ORL			
				1:59:34 PM	1432.11	ORL			
				4:14:18 PM	1610.22	PHX			
						Results: 5 of 5			
Notes			$\mathbf{v}$			Ψ×			
		OK Canc	el		¢	Add Note			
6/25/20	09 1:07:26 PM	dogden							

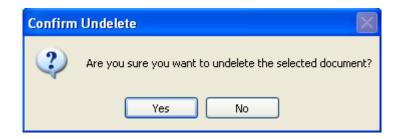
Records deleted from IQdesktop are never actually deleted but are flagged as such, much like the Windows recycling bin. Selecting "Include Deleted" button from the View menu allows a user to show or hide the deleted documents if he or she has permissions to do so. Deleted records have a red 🔀 at the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



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

Search X									
: 😰	2 🤤	) 🗄 a	9 🖡	🖂 🗽 🔂	1	🕈 Grid Edit 🕴		🗄 🔂	
DocumentType IN ('Invoice')									
Drag a column header here to group by that column									
×	1	2		CreateDateTime		PageCount	DocumentType	Document	
	1	1	1	1/2/2013 10:52:	22 AM	5	Invoice	Orlando	
×	2	2	2	1/2/2013 11:22:		<u>V</u> iew	Ctr	I+I O	
			권	1/2/2013 11:23:		Edit	Ctrl+Shift	+E 0	
			권	1/2/2013 3:05:4 1/2/2013 3:06:1		Annotate		×	
		6 <b>1</b> °	A	1/2/2013 3:06:1	R.	Add Revision		~	
					8	Route			
					B	Sava Local Co	opy Ctrl+Shift	1	
						Export to Fold			
					-				
						E <u>m</u> ail Docum	ient Ctri+	IM	
					8	Batch Print			
					8	<u>S</u> how Associa	ated Ctrl-	•0	
						Find Similar			
History					Ð	D <u>u</u> plicate	Ctrl-	+ D	
🐞 🍺 Show Details						<u>D</u> elete	Ctrl+Alt-	+D	
Action	1				ゥ	Undelete	2		
Delete						W <u>a</u> tch Docur		+ T	
Save					ß	Stop Watchin	ng Ctrl-	+U	
Note						- 1	5		

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



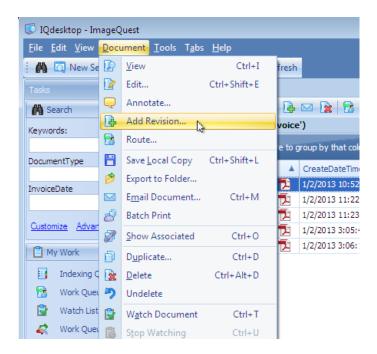
The user will then be prompted to enter a note explaining why the document was undeleted as noted below.

Note: Users must have the "Delete Documents" permission to delete documents and the "View Deleted Documents" permission to search for and display documents with a "Deleted" status. To undelete a record, users must have both of the permissions listed above. See the ImageQuest Administrator's Guide for more information.

## **Revising Documents**

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

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



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

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

History		Ψ X
🚋 🗽 Show Details		
Action	Event Date 🗸	User Name
Revision	1/2/2013 3:53:31 PM	tjones
Save View Revision	1/2/2013 3:53:31 PM	tjones
Undelete	1/2/2013 3:44:41 PM	tjones
Delete	1/2/2013 3:44:05 PM	tjones
Save	1/2/2013 3:19:41 PM	tjones 🗸 🗸
🚳 History 📜 Notes 🧳 Workflow History 🎼	Open Work Items	

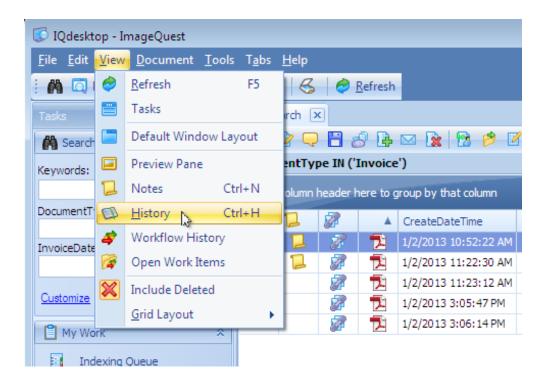
Note: The file type being revised must be the same as the file type intended to be added, except in the case of .pdf files which may be .pdf or .tif.

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 below.



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

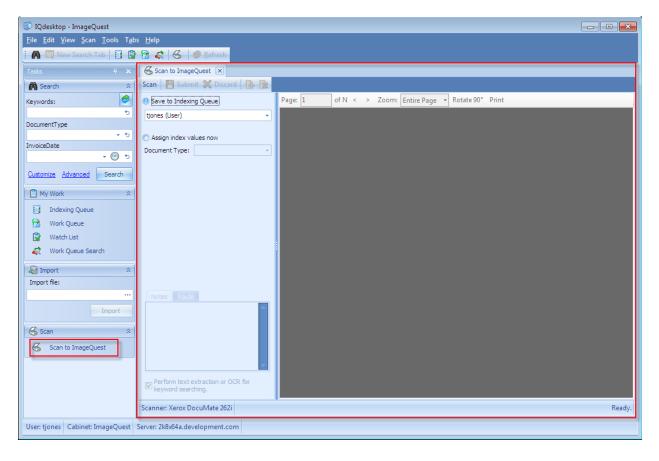
History			<del>Р</del> >
Action	Event Date	Vser Name	
Revision	1/2/2013 3:53:31 PM	tjones	
Save	1/2/2013 3:53:31 PM	tjones	
Undelete	1/2/2013 3:44:41 PM	tjones	
Delete	1/2/2013 3:44:05 PM	tjones	
Save	1/2/2013 3:19:41 PM	tjones	
🕼 History 📜 Notes 🧳 N	Vorkflow History 🏾 🌠 Open Work Items		

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

History 📮								
🚡 👔 Show Details								
Action	Event Date	Viser Name	<b>^</b>					
Save	1/2/2013 11:34:11 AM	tjones						
Added DocumentGroup value Orlando								
FileView	1/2/2013 11:32:16 AM	tjones						
Save	1/2/2013 11:07:28 AM	System						
Modified NeedsOcr from True to False			-					
🕼 History 📜 Notes 🏼 🦨 Workflow Histo	ory 🌠 Open Work Items							

#### **Scan to ImageQuest**

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



😽 Scan to ImageQuest 🗵	
Scan 🛛 💾 Submit 💥 Discard 🔹 隆	
Save to Indexing Queue	Page: 1 of N < > Zoom: Entire Page  Rotate 90° Print
tjones (User) 👻	
Assign index values now     Document Type:	
Document Type:	
Notes Route	
Perform text extraction or OCR for keyword searching.	
Scanner: Xerox DocuMate 262i	Ready.

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

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

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

Scan to ImageQuest 🗴		
-Scan 🛛 💾 Submit 💥 Discard 🛛 📑 🗽		
🔘 Save to Indexing Queue	Page: 1	of 5 < > Zoom: Entire Page - Rotate 90° Print
tjones (User) 👻		
Assign index values now		INVOICE informa
Document Type: Invoice 👻		REMIT TO: INVOICE NUMBER: BIGHTD
DocumentGroup		Informa Software INVOICE DATE: 10/01/12 123 Salary Street
ORLANDO マ か CustomerName Big Corp. か		Orlando, FL 37830 BILL TO: SHIP TO: BILL Corp. BILL Corp. P.O. Box 502332 345 Cask Parkway P.O. Box 502332 345 Cask Parkway Norman, OK 75432 Selfuter, OK 75622
Big Corp. 👈		Nerr # Description CluserNity Unit Price Total
InvoiceDate		7G802 CopyPaper - WHT, LTR 10 25.50 255.00 70902 CopyPaper - WHT, LTGAL 10 28.00 288.00
10/1/2012		PENDO Pen-BIX 200 0.75 150.00 PENDO Pen-BIX 200 0.75 150.00 PENDO Pen-BIU 200 0.75 150.00
InvoiceAmount		
\$835.00 5		
Notes Route Paid \$150.00 11/1/2012		
Perform text extraction or OCR for		AMOUNT DUE 835.00
Perform text extraction or OCR for keyword searching.		
Scanner: Xerox DocuMate 262i		Ready.

Scan to ImageQuest 💌		
Scan 🛛 💾 Submit 💥 Discard 🛛 强 🗽		
O Save to Indexing Queue	Page: 1 of 5 <	< > Zoom: Entire Page 🔻 Rotate 90° Print
tjones (User) 👻		
(a) Assign index values now		
Document Type: Invoice 👻		INVOICE NUMBER: \$50470
DocumentGroup		REMIT TO: BAUGLET MUMBER: BAUGUET Informa Software 128 Baues Street
ORLANDO - 5		Criando, FL 32830 BILLTO: SHIPTO:
CustomerName		ных Ко. Big Corp. P.O. Bos 2032 345 Gale Рим. Norman, OK 75432 Sollwatter, OK 75622
Big Corp. 👈		Item # Description Quantity Unit Price Total
InvoiceDate		76802 Copy Paper - WHT, LTR 10 25.50 255.00
10/1/2012		763902         Copy Paper – WHT, LEGM.         10         28.00         379.20           #FM300         Pen – MLK         200         0.75         150.00           #FM302         Pen – MLK         200         0.75         150.00
InvoiceAmount		
\$835.00 5		
Notes Route Route To:		
Administrator (User)		AMOUNT DUE 835.00
Scanner: Xerox DocuMate 262i		Ready

Notes Route Route To:	
approver1 (User)	× 5
Message:	
Please review and approve	•

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

# **PDF Annotation**

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

🕼 IQdesktop - Im	nageQ	uest				
<u>F</u> ile <u>E</u> dit <u>V</u> iew	Docu	ument	<u>T</u> ools	T <u>a</u> bs	<u>H</u> elp	
🗄 🕅 🗔 New Se		<u>V</u> iew			Ctrl+I	fresh
Tasks		Edit			Ctrl+Shift+E	
A Search	Q	Anno	tate	12		- 6
	•	Add R	evision			voice
Keywords:	1	Route				e to g
DocumentType		Save <u>I</u>	ocal Co	ру	Ctrl+Shift+L	
	1	Export	t to Fold	ler		
InvoiceDate		E <u>m</u> ail	Docum	ent	Ctrl+M	- É
	8	Batch	Print			12
Customize Advan	<b>7</b>	<u>S</u> how	Associa	ated	Ctrl+O	12
My Work	ß	D <u>u</u> plie	ate		Ctrl+D	
Indexing Q		Delete	2		Ctrl+Alt+D	
😚 🛛 Work Queu	う	Undel	ete			1
🕞 🛛 Watch List		W <u>a</u> tcł	n Docur	nent	Ctrl+T	
🧔 🛛 Work Queu	6	S <u>t</u> op \	Vatchin	g	Ctrl+U	24

🖵 Document Editor		
<u>F</u> ile <u>V</u> iew		
🕴 🗊 📎 📴 🏠 🧠 🎮 🖊 1 🛛 / 1 Zoom: 100	- 🗣 = 🤶 🤍 🗉 🔁 🕂 🚺 📰	
:	<b>-</b>	
Thumbnails 🗜 🗙		
		ware
bhails	REMIT TO: INVOICE NUMBER: 8 Informa Software INVOICE DATE: 1 123 Baker Street Orlando, FL 32810	66670 0,901/12
Thumbnails 1 Bookmar	Bill_TO:         SHIP TO:           Bill_COP:         Bill_COP:           P.O. Rex 102332         345 Oak Parkway           Morman_OK 75432         Stillwater, OK 75622	
· · · · · · · · · · · · · · · · · · ·	Item # Description Quantity Unit Price	
Annotations	76802 Copy Paper - WHT, LTR 10 25.50 76952 Copy Paper - WHT, LTGAL 10 28.00 PENIDO Pen - BIC 200 0.75 PENIDO Pen - BIC 200 0.75	255.00 280.00 150.00 150.00
	AMOUNT DUE	835.00

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

Note: Annotations cannot be edited nor deleted once the document has been saved.

-	
1	Saves the annotations and closes the form
-	Pan document tool – click and hold the left mouse button to move the image
Ø	Select annotations – use this tool to select and edit annotations
	Select text – click to select text on the page
6	Print – prints the document
<b>S</b>	Previous page
<i>~</i>	Next page
R	Zoom in – click the page to zoom in
<b>G</b>	Zoom out – click the page to zoom out
<u> </u>	Marquee zoom – draw a box to define the zoom area
1:1	Actual size – zoom to the actual size of the document
<b></b>	Fit entire page – zoom to fit the entire page to the viewer
$ \longleftrightarrow $	Fit width – zoom to fit the document width in the viewer
1	Fit height – zoom to fit the document height in the viewer
<b>*</b>	Rotate left – rotates the page 90 degrees counter-clockwise
	Rotate right – rotates the page 90 degrees clockwise
	Single page layout – display a single page at a time in the viewer
	Continuous page layout – display pages as a list in the viewer
	Two columns – display the pages in two continuous columns
,	Comment – creates a comment annotation
ABB	Text box – creates a text box annotation
	Stamp – creates a predefined rubber stamp annotation such as DRAFT or CONFIDENTIAL
	Black box – creates a solid black box annotation
	Rectangle – draws a rectangle annotation
0	Ellipse – draws an ellipse annotation
/	Line – draws a line annotation
$\sim$	Arrow – draws an arrow annotation
1	Ink pen – draw freehand ink pen markings on the page
<b>Æ</b> 1	Highlighter – draws a yellow opaque highlighter box annotation
A	File attachment – embed a file attachment annotation into the document

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

PDF Annotation also allows users to insert PDF pages before or after existing pages in the document. To do so, the user can right-click on a page and select "Insert pages before..." or "Insert pages after...". This will open an Open PDF File dialog and the user can browse for and select the PDF they wish to insert as an additional page or pages to existing document.

In the example below, Insert pages before is selected and the user locates and selects the Invoice – Supplement PDF file from their local system. To insert, they click "Open".

	- r - r - r - r - r - r - r - r - r - r	
Thumbnails 4 x Thumbnails 4 x 1 Insert pages before 1 Insert pages after	INVOICE         Differentiation           Model Number         0.01 / 0.01           State Street         Notice Number           Data State Street         Notice Number           Data Street         Notice Number           Street         Notice Number           Notice Number         Notice N	
â	🚱 🖓 🗣 🚺 « Local Disk (C:) 🕨 Invoice Supplements 🔹 🍫 Search Invoice Supplements	× ~
	Recent Places     Name     Date modified     Type     Size       Size     Size     Size     Size     Size	
	Documents       ♪ Music       □ Pictures       ☑ Videos       !■ Computer       Q Network	
	File name: Invoice - Supplement	•

As shown below, the Invoice – Supplement PDF has been inserted into the existing document as Page 1 and the original page is now page 2.

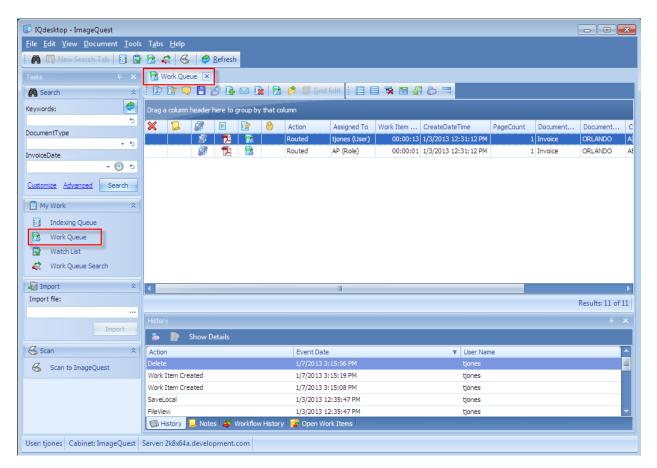
Q Document Editor							- • •
<u>F</u> ile <u>V</u> iew							
🕴 🗊 🚫 📴 🔊 🧠 🌈 1 🛛 / 2 Zoom: 100		l 🤶 🤍 🗉 付	• • 1 1				
i 🖵 🧶 🔲 🗖 🔿 🖊 🐴 🖉 i 🖞 🚳	<b>,</b>						
Thumbnails 4 ×						7	
Thumbhails		INV	OICE	infor softw			
	REMIT TO: Informa Sol 123 Baker S Orlando, FL	ftware itreet	INVOICE NU				
Bookmar		BILLTO: ABC, Inc. 376 Baker Street Miami, FL 50422	SHIP TO: ABC, Inc. ATTN: Jim 376 Baker Street Miami, FL. 50422	smith			
옥 :	item #	Description	Quantity	Unit Price	Total		
2 App	7G802 PEN100 INK20R STAP12 TAPE05	Copy Paper – WHT, LTR Pen – IBLK Printer Ink – Red Stapler (12) Tape (5)	10 200 6 1 4	25.50 0.75 12.75 25.00 8.00	255.00 150.00 76.50 25.00 32.00		
Annotations							
	AMOUNT D	NUE			538.50		

Once the document has been saved, it will become the latest revision and the new active document when viewing the image.

#### Note: The insert pages feature supports single and multi-page PDF files.

# **Work Queue**

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



Unlike the search tab, double clicking a record in the work queue will open the work item for processing rather than viewing the document. In order to launch the document from the work queue in the native file viewer, the user will have to right click on the document and select the "View" option. Users may also right click on a document and select 'Open Work Item' to process a work item in the work queue.

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

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

When a user double-clicks a work item, the "Complete Work Item" window appears as shown below. This window looks exactly like the edit document screen. The main difference is that saving these changes will cause the document to be removed from the work queue, even if nothing has been modified.

For this example, the user enters a note to confirm the InvoiceAmount is correct and select the AP role from the Route tab. When the user clicks "Save", the work item is removed from the user's Work Queue and will added to the AP role's Work Queue.

🕜 Complete Work Item		
Document Type: Invoice	•	
DocumentGroup		
ORLANDO	- 5	
CustomerName		
ABC, Inc.	5	
InvoiceDate		
10/2/2009	+ ts	
InvoiceAmount		
\$538.50	5	
Notes Route InvoiceAmount is correct		
	Notes Route	
	Route To:	
		÷ ۲
	Administrator (Use	er) 🔼
Save	approver 1 (User) approver 2 (User)	
	iquser (User)	=
	tjones (User)	
	AP (Role)	
	Atlanta (Role)	

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

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

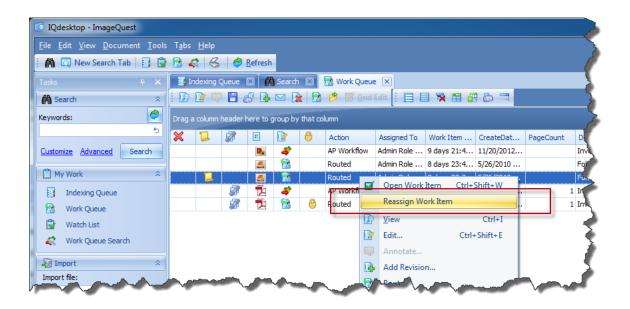
#### **Work Queue Columns**

Four new columns have been added to the work queue to assist with processing work items: Work Item Age, Work Item Type, Locked and Assigned To. The Action column has also been changed from previous versions.

Work Item Age	Shows how long the document has been in the current work queue
Work Item Type	Denotes where the work item came from. There are currently three different types of work items: Routed 🐕, Notification 🗳, and Workflow Task 🇳.
Locked	The locked column is designated with the 🔀 icon and will show the same icon on any document that is currently being processed by a user in the system.
Assigned To	Denotes whether a work item is owned by an individual user or is shared with other users in the same roles (previously displayed in the Action column).
Action	Displays the Notification Rule name or the Workflow Name that was configured in IQadministrator. For routed work item types, this will always be listed as Routed.

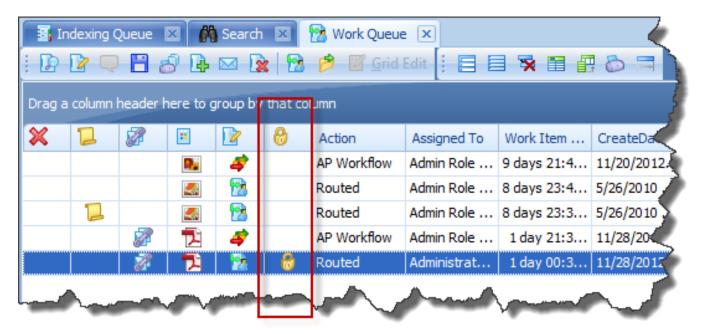
#### **Reassign Work Items**

Work Queue items may now be reassigned to other users or roles by right clicking on one or more documents and selecting 'Reassign Work Item'. When a work item is reassigned to another user or role, it is removed from the current work queue and an email notification is sent to the newly assigned user(s).



#### **Record Locking**

When a document is opened from the work queue or from the WebIQ email link, the document record will be locked so that other users cannot process the document at the same time. This is the same mechanism that exists in the Indexing Queue. Documents will stay locked for thirty minutes and can be overridden after the lock period expires. Locked documents are denoted by the ⁶/₆ icon.



# **Find Similar Documents**

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

Find Similar Documents	J
Select the attributes you would like to search for.	
<ul> <li>CreateDateTime = 10/27/2011 11:28:51 AM</li> <li>DocumentGroup = Public Group</li> </ul>	
DocumentType = Invoice	
Invoice Due Date = 12/3/2011	
Invoice Number = 112 Invoice Total = \$148.00	
PageCount = 2	
Paid = True	
Vendor = Sam's Electrical	
Open search results in a new tab.	
Search Cancel	

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

# **New Search Tab**

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

🕼 IQdesktop - ImageQuest										
<u>File Edit View D</u> ocument <u>I</u> ools T <u>a</u> bs <u>H</u> elp										
🗄 🕅 🖾 New Search Tab 📴 😰 🗟 🚓 🦂 🥔 Refresh										
Tasks 4 x 🕅 Search X										
🎆 Search 🛛 🔹 📴 😰 📿 💾 🔗 📴 🖂 🗽 🔯 😰 Grid Edit 🕴 🚍 🖼 🐺 🛗 🔐 💩 🧮										
Keywords:										
6	Drag a	column	header l	nere to g	roup by that column					
DocumentType	×	1	2	Å	CreateDateTime	PageCount	DocumentType	DocumentGroup	CustomerN	
InvoiceDate		1	8	1	1/2/2013 10:52:22 AM	5	Invoice	Orlando	Big Corp.	
- · · · ·				1	1/2/2013 11:22:30 AM	5	Invoice	Orlando	Big Corp.	
			P	2	1/2/2013 11:23:12 AM	5	Invoice	Orlando	Big Corp.	
Customize Advanced Search			P	1	1/2/2013 3:05:47 PM	1	Invoice	Atlanta	GB Graphics	
My Work 🌣			P		1/2/2013 3:06:14 PM	1	Invoice	Phoenix	Fun 2 Run	
Indexing Queue										

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

n Search		
Keyword search criteria:		
		5
Custom Search Saved Que	ries	1
Document types to include:	Invoice	•
Enter values for any attributes	Appointments	
DocumentGroup	Invoice	
CustomerName	Main v2     Main v2     Patient Health Record	
Big Corp.		
InvoiceDate		
InvoiceAmount		
CreateDateTime		
	Select All Clear	ОК
PageCount		
	to	5
Clear		Search Cancel

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

Search X       Search X         Image: Search X       Image: Search X         Imag										
Drag a	a column	header l	here to <u>c</u>	proup by that co	lumn					
×	1	1		CreateDat	PageCount	Document	Document	CustomerN	InvoiceDate	
	12	1	2	1/2/2013 1	1	Invoice	ORLANDO	Big Corp.	10/1/2012	
	1	A	2	1/2/2013 1	5	Invoice	ORLANDO	Big Corp.	10/1/2012	

#### **Save Local Copy**

"Save Local Copy" allows IQ users to save documents from IQdesktop to their client PC or a network location. To save a local copy, right-click on a document and select "Save Local Copy. A Windows "Save As" dialog will open and the user can then save the document to the desired location. To save multiple documents at once, select multiple documents in the grid by pressing <ctrl> or <shift> while selecting. Then follow the same procedure to save them all to the same location. Saved copies names will include their document type and any attributes with the "Include in Filename" setting.

🕼 IQdesktop - ImageQuest							
<u>File Edit View D</u> ocument <u>T</u> ool	s T <u>a</u> bs <u>H</u> elp						
🕴 🕅 🖸 New Search Tab 📑 🕃	ł 🖻 🧟 🕱	🥏 <u>R</u> efres	<b>1</b>				
Tasks 🛛 🛱 🗙	Search 💈	ĸ					
A Search 🌣	: 🕩 🕑 🤤	) 🗄 🔗 🖪	🖂 🗽 🔂 🤌	📝 <u>G</u>	rid Edit 📔 📃 🍯	k 🖬 🗗 💩	=
Keywords:	DocumentTy	pe IN ('Invoic	e')				
5	Drag a column	header here to	group by that column				
DocumentType	× 1		CreateDateTime	Pag	geCount Document	. Document	Custo
InvoiceDate		2 🄁	1/2/2013 10:52:22 AI		View	Ctrl+I	Big Co
- 🕑 ti			1/2/2013 11:22:30 Af		-	Ctrl+Shift+F	Big Co
Customize Advanced Search			1/2/2013 11:23:12 Al 1/3/2013 9:03:14 AM	_	Annotate	etti onne e	Big Co ORLA
[ ^{19]}			1/3/2013 11:20:46 Af		Add Revision		Big Co
My Work *			1/3/2013 11:24:06 AM	172	Route		
Indexing Queue			1/3/2013 11:24:56 Al 1/3/2013 11:27:01 Al		Save Local Copy	Ctrl+Shift+L	
12 Work Queue			1/3/2013 11:27:01 A		Export to Folder		Big Co
Watch List			1/3/2013 12:31:12 PM		E <u>m</u> ail Document	Ctrl+M	ABC,
🧔 Work Queue Search			1/3/2013 12:35:10 PM		Batch Print		Big Co
🔊 Import 🕆		2 1	1/3/2013 12:38:20 PM	8	Show Associated	Ctrl+0	Big Co
Import file:					Find Similar		
	History			Ð	D <u>u</u> plicate	Ctrl+D	
Import	i 🔁 🗗	Show Details			Delete	Ctrl+Alt+D	
🗟 Scan 🛛 🖈	Action		Ev	う	Undelete		T
😽 Scan to ImageQuest	FileView		1/		Watch Document	Ctrl+T	
	FileView		1/	6	Stop Watching	Ctrl+U	-
	FileView		1/				

# **Email Document**

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

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

🕼 IQdesktop - ImageQuest							
<u>File Edit View D</u> ocument <u>T</u> ools	; T <u>a</u> bs <u>H</u> elp						
🚺 🔯 New Search Tab 📑 🕃	1 🔁 🧟	🥏 <u>R</u> efre	h				
Tasks 🕂 🗶	🕅 Search 🕨	C					
A Search 🖈	i 🖸 🔽 🖵	88	i 🖂 🗽 🔁 🤌	📝 <u>G</u>	rid Edit 📔 📃	🛪 🖩 🖶 💩	=
Keywords:	DocumentTyp	oe IN ('Invoi	ce')				
5	Drag a column i	header here t	group by that column				
DocumentType	× 1	27 E	CreateDateTime	Pa	geCount Documer	nt Document	Custo
InvoiceDate	1	2 🏂	1/2/2013 10:52:22 A		10	Ctrl+I	Big Co
- @ 5	1	<b>1</b>	1/2/2013 11:22:30 AM		View		Big Co
		<b>a</b> 12	1/2/2013 11:23:12 AM	2	Edit	Ctrl+Shift+E	Big Co
Customize Advanced Search			1/3/2013 9:03:14 AM	Q	Annotate		ORLAN
Mv Work 🖇		2	1/3/2013 11:20:46 AM		Add Revision		Big Co
			1/3/2013 11:24:06 AM	12	Route		
Indexing Queue					Save <u>L</u> ocal Copy	Ctrl+Shift+L	L
🐕 Work Queue				-	Export to Folder	Carronne - E	
🕞 Watch List			1/3/2013 12:29:22 PN 1/3/2013 12:31:12 PN		1	01 M	Big Co ABC, I
🚓 🛛 Work Queue Search			1/3/2013 12:35:10 PM		E <u>m</u> ail Document.	Ctrl+M	Big Cor
Import ô			1/3/2013 12:38:20 PM		Batch Print		Big Cor
- Kit subort			-,-,	1	Show Associated	Ctrl+O	- g co
Import file:					Find Similar		
	History			A	Duplicate	Ctrl+D	
Import	Teo 👔 🛃	how Details			Delete	Ctrl+Alt+D	
🖌 Scan 🌼		now Details			Undelete	Curr Alt. D	
	Action FileView		Ev 1/-				T
Scan to ImageQuest	FileView		1/-		Watch Document	Ctrl+T	
	FileView		1/	6	S <u>t</u> op Watching	Ctrl+U	

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

😫 Untitled - Message (HTML)
Elle Edit View Insert Format Iools Actions Help
: 🖃 Send   🛃   🐰 🗈 🛍   🏂 🕕 💷   📍 🦊 🕴 Options   🕖
This message has not been sent.
To
<u><u><u><u></u></u><u></u><u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u></u></u></u>
Subject:
Attach Invoice (Revision 1).pdf (85 KB)
N N

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

#### **Batch Print**

Users are now able to select multiple documents from the search grid in IQdesktop and print them all at the same time.

To print multiple documents, hold down the CTRL key and then left click each document to be printed one time. Alternatively, to print a range of documents, left click on the first document one time and then hold down the SHIFT key and left click on the last document one time. Once all of the documents are highlighted, select the icon from the toolbar or right click on one of the highlighted documents and select 'Batch Print'. The selected documents will then be sent to the user's default printer for printing.

🕼 IQdesktop - ImageQuest											
<u>File Edit View D</u> ocument <u>T</u> ools	; T <u>a</u> bs <u>H</u> elj	р									
🕴 🕅 🗔 New Search Tab 📑 🕃	8 🕰 🤞	S   🥏 I	<u>R</u> efresh								
Tasks 🖁 🗸	🕅 Search	💌 🔂	Work Q	ueue 🕨	•						
🕅 Search 🏾 🕆	E 🕑 🔽	🤜 💾 g	9 🖪	🖂 🚺	1 🔁	🤌 🗹 G	rid Ed	it 🗄 🗏 🗏	i 🛪 🖬 🗗	; 🖧 🧮	
Keywords:	Drag a colun	nn header h	ere to g	group by	that co	umn					
	× 1	📜 🌌 🗉 📝 😚 Action Assigned To Work Item CreateDat Page								PageCo	
DocumentType	~ ~		1	4	<b>•</b>	AP Workflo		P (Role)		1/3/2013 1	ragee
✓ 1 InvoiceDate			1	8		Routed		ones (User)		1/3/2013 1	
		2	74	28		Routed	-	Open Worl	- Thomas - Chul	+Shift+W	
		2	2	6		Invoice Pay	Ø			+ SHILE W	
Customize Advanced Search		2	74	1		Invoice Pay		Reassign V	Vork Item		
🖺 My Work 🛛 🕆							P	<u>V</u> iew		Ctrl+I	
Indexing Oueue							2	Edit	Ctr	l+Shift+E	
Work Queue							Q	Annotate			
							4	Add Revisi	on		
							1	Route			
🧔 Work Queue Search								Save <u>L</u> ocal	Copy Ctr	l+Shift+L	
🔊 Import 🕆	•						1	Export to F	older		
Import file:								E <u>m</u> ail Docu	ument	Ctrl+M	
	History						න්	Batch Print	t N		
Import							22	Show Asso	ciated	Ctrl+0	
	è 🕑	Show De	tails					Find Simila		curr o	
😪 Scan 🔹	Action					Event D					User Nar
😸 Scan to ImageQuest	Undelete Delete					1/7/201	-	D <u>u</u> plicate		Ctrl+D	jones
	Undelete					1/7/2013	146	<u>D</u> elete	C	trl+Alt+D	tjones tiones
	Delete					1/7/201	-	Undelete			tiones
	Work Item C	Created				1/7/2013	rOn l	W <u>a</u> tch Doo	ument	Ctrl+T	tjones
	🚳 History	📜 Notes	ا 🍣 ا	Norkflow	History	🎯 Open	6	S <u>t</u> op Watcl	hing	Ctrl+U	

Note: Batch Print only works with TIF and PDF documents. If other file types are included in the print selection, only the supported files will be queued for printing.

#### Watch List

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

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

🕼 IQdesktop - ImageQuest									
<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>D</u> ocument	Tool	<mark>s T<u>a</u>bs <u>H</u>elp</mark>							
👬 🔯 New Search Tab	A	Search	Ct	rl+F					
Tasks 🌵	3	Indexing Queue	Ctr	rl+Q					
A Search		Watch List	Ctr	I+W					
	1	Work Queue	Ct	rl+R					
Keywords:	4	Work Queue Sea	rch						
DocumentType	B	<u>M</u> anage Document Types							
	- 5		-20		Γ				
InvoiceDate			<u>ar</u>	4	1				
- 🖲	) 5			2	1				
	_			7	1				
Customize Advanced Sear	ch		2	2	1				
My Work	\$			4	1				
E hy work				4	1				
Indexing Queue			R		1				

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

🐼 IQdesktop - Image	Quest											
<u>File Edit View Doo</u>	cument <u>T</u> ools	T <u>a</u> bs	<u>H</u> elp									
👬 🔯 New Search	Tab 🔢 🕃	8	: 6	0	<u>R</u> efresh							
Tasks		M s	earch 🛛	3	Watch	ist 🗙						
🕅 Search 🛛 🔹 📴 😰 🖓 📮 🔂 🚱 🚾 🗽 🖄 🎓 🗭 🙆 🥵 🖆 🕼 📾 🗮												
Keywords:	2	Drag a	a column	header	here to	group by that co	olumn					
	6	×	1			CreateDat	PageCount	Document	Document	CustomerN	InvoiceDate	InvoiceAm
DocumentType	- 5			2	12	1/2/2013 1	1	Invoice	ORLANDO	Big Corp.	10/1/2012	\$835.00
InvoiceDate			1	7	1	1/2/2013 1	5	Invoice	ORLANDO	Big Corp.	10/1/2012	\$65.00
	• 💮 to				2	1/2/2013 1	5	Invoice	ORLANDO	Big Corp.	10/1/2012	\$1,350.7
				7	2	1/3/2013 9:	1	Invoice	ORLANDO	ORLANDO f		

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

# **Export to Folder**

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

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



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



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

Export	to Folder  🕅
(į)	Export to C:\AllFiles\MyExportedFiles has completed. Would you like to view the exported information now?
	Yes No

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

C:\AllFiles\MyExportedFiles\def	ault. hta						
Search for CreateDateTime 💌		Sea	rch Cle	ar			~
	,					1	
View 💥 📜 🚀 🗉 <u>CreateDate1</u> <u>View</u> 📜 🗊 🔁 06-23-09	fime PageCoun 3	t DocumentType Invoice	RoutedTo dogden	DocumentGroup	CustomerName Erin Grant	InvoiceDate 05-19-09	InvoiceAmount 4236.19
	5	Invoice	uoguen	UNL	Lini Granc	05 15 05	4230.13
							~

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** from the right-click menu or from the "Document" menu as illustrated below.

😺 IQdesktop - Im	nageQ	uest				
<u>F</u> ile <u>E</u> dit <u>V</u> iew	Docu	ument	<u>T</u> ools	T <u>a</u> bs	<u>H</u> elp	
🕴 🕅 🗔 New Se	Þ	<u>V</u> iew			Ctrl+I	fr
Tasks		Edit			Ctrl+Shift+E	
👸 Search	Q	Annot	tate			
Keywords:	•	Add R	evision.			v
weywords.	1	Route				
DocumentType	Η	Save <u>L</u>	ocal Co	ру	Ctrl+Shift+L	
	۹	Export	t to Fold	er		
InvoiceDate		E <u>m</u> ail	Docum	ent	Ctrl+M	,
	8	Batch	Print			Ē
<u>Customize</u> <u>Advar</u>	1	<u>S</u> how	Associa	ted	Ctrl+O	
My Work	Ð	D <u>u</u> plie	cate	12	Ctrl+D	
Indexing C		<u>D</u> elete	2	10	Ctrl+Alt+D	
😪 🛛 Work Quei	ゥ	Undel	ete			Ŀ
🕃 🛛 Watch List		W <u>a</u> tcł	n Docum	nent	Ctrl+T	Ľ
🧟 🛛 Work Quei	6	S <u>t</u> op \	Natchin	9	Ctrl+U	

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

📝 Duplicate Docu	iment	
Document Type:	Invoice	•
DocumentGroup		
ORLANDO		* to
CustomerName		
Big Corp.		•
InvoiceDate		
10/1/2012		+ to
InvoiceAmount		
\$835.00		9
Notes Route		
		Ì
	Save	i Cancel

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

94

#### **Show Associated**

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

🐼 IQdesktop - Im	nageQu	Jest			
<u>F</u> ile <u>E</u> dit <u>V</u> iew	Docu	<mark>ment <u>T</u>ools T<u>a</u></mark>	bs <u>H</u> elp	_	
🗄 🕅 🗔 New Se		<u>V</u> iew	Ctrl+I	fresh	
Tasks		Edit	Ctrl+Shift+E		
Search	Q	Annotate		R	🖂 🗽 🔁 🔁 🦉 G
Keywords:	•	Add Revision		voice	
Reywords:	1	Route		e to a	roup by that column
DocumentType		Save <u>L</u> ocal Copy	Ctrl+Shift+L		
	1	Export to Folder		2	CreateDateTime A Pag 1/2/2013 10:52:22 AM
InvoiceDate		E <u>m</u> ail Document	Ctrl+M		1/2/2013 11:22:30 AM
	8	Batch Print			1/2/2013 11:23:12 AM
<u>Customize</u> <u>Advar</u>	2	Show Associated	Ctrl+O	14	1/3/2013 9:03:14 AM
My Work	_	– D <u>u</u> plicate…	Ctrl+D		1/3/2013 11:20:46 AM
Indexing Q	-	Delete	Ctrl+Alt+D		1/3/2013 11:24:06 AM 1/3/2013 11:24:56 AM
Work Que		Undelete	CULTAILTD	권	1/3/2013 11:24:56 AM
	1			Â	1/3/2013 12:29:22 PM
		Watch Documen		1	1/3/2013 12:31:12 PM
🧟 🛛 Work Quei	B	S <u>t</u> op Watching	Ctrl+U		1/3/2013 12:35:10 PM

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

_	🕼 🕜 🖵 💾 🔗 📴 🖾 🖹 😕 🤌 🧭 🧭 Grid Edit 🕴 🚍 🖶 🐺 🛗 🐺 🖏 🧮											
Drag	a column	header	here to	group by that column								
		- 20										
×	1			CreateDateTime	PageCount	Document	Document	Customer				
×		7	•	CreateDateTime 1/2/2013 10:52:2		Document Invoice	Document ORLANDO	Customer Big Corp.				

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".

# **Import a File**

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

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

🕼 IQdesktop - ImageQuest	
<u>File Edit View Tools Tabs H</u> elp	
🕴 🕅 🔟 New Search Tab 🛛 🔀 😰 🔀 🦛 🥝 🖉 Refresh	
Tasks 4 x	
M Search 🖈 🕼 Open	
Keywords:	
Organize 🕶 New folder	
DocumentType     Type     Type     Type     Siz	
InvoiceDate	
Commodal     Second Places     Second Place	
Customize Advanced Search	
C Mw Work	
E Dictorer	
Work Queue     Videos       Watch List     Videos	
ag Import	
Import         File name:         Big Corp INVOICE additional purchase         All files (*.*)	
G Scan ☆ Cancel	
Scan to ImageQuest	
User: tjones Cabinet: ImageQuest Server: 2k8x64a.development.com	

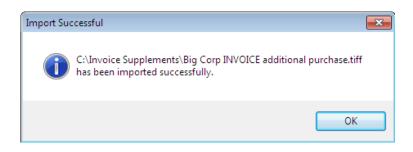
The "Import file" field will display the file path of the selected file. Click "Import" to launch the "Import to ImageQuest" indexer and assign a Document Type and attribute values.

🌆 Import	*
Import file:	
C:\Invoice Supplemen	ts\Big Co ···
	Import

See the following page for an example. The user can select a User or Role to route the document to and enter an associated message. Click "OK" to import the document to IQdesktop.

Import to ImageQuest						- • •
Big Corp INVOICE additional purchase.tiff	Page: 1	of 5	i < > Zoom: Entire	Page 🝷 Rotate	e 90°	
Select Document Type:						
Invoice 👻					• • •	
DocumentGroup			INVOI	CE	s of tw	
ORLANDO 👻 🕤						
CustomerName		REMIT TO: Informa Softw		INVOICE NUM INVOICE DAT		
Big Corp. 5		123 Baker Str Orlando, FL 3				
InvoiceDate			BILL TO: Big Corp.	SHIP TO: Big Corp.		
10/1/2012 👻 🕤			P.O. Box 102332 Norman, OK 75432	345 Oak Parkway Stillwater, OK 75622		
InvoiceAmount		item #	Description	Quantity	Unit Price	Total
\$835.00 5		76802	Copy Paper – WHT, LTR	10	25.50	255.00
		7G802 7G902 PEN100 PEN102 PEN102	Copy Paper – WHT, LEGAL Pen – BLU Pen – BLU	10 10 200 200	28.00 0.75 0.75	253.00 2280.00 150.00 150.00
Route		AMOUNT DO				833.00
Route To:						
Message:						
Perform text extraction or OCR for keyword searchi	ing.				OK	Cancel

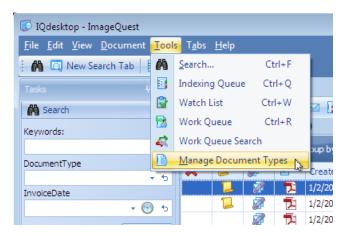
An "Import Successful" message will confirm the import is complete, as shown below. Click on "OK" to continue.



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

# **Managing Document Types**

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



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

🕼 IQdesktop - ImageQuest								
<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>T</u> ools T <u>a</u> bs <u>H</u> elp	D							
🛛 🕅 🖸 New Search Tab 📑 🕃	🔁 🍂 💪 🥏 <u>R</u> efresh							
Tasks 🕂 🗙	🕅 Search 🗵 🚺 Manage Docu	iment Types 💌						
Search 🌣	Manage Document Ty	/pes						
Keywords:	Document Types Attributes	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,						
5	Add Edit	Allow users a	access to this	s document	tvpe bv d	efault.		
DocumentType	Appointments	Assign attribute			-,,,-			
InvoiceDate	Invoice		to reponding		-	Assign	Add Nev	v Attribute
- 💮 to	Main v2							
	MFP Scan	Name	Data Type	Required	Default	Minimum	Maximum	Include in Filena
Customize Advanced Search	Patient Health Record	CustomerName	Text	No				No
📋 My Work 🛛 🕆								
Indexing Queue								
Work Queue								
🔮 Watch List								
C Week Overve Creek								

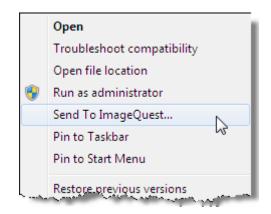
# Additional ImageQuest Client Applications

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

- Microsoft Windows Explorer Connector
- Microsoft Office Connector
- IQprinter

#### **Microsoft Windows Explorer Connector**

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



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

🚽 Send To ImageQuest 📃 💽
Big Corp INVOICE 11786.tiff
Select Document Type
Invoice 🗸
DocumentGroup
ORLANDO - 5
CustomerName
Big Corp. 5
InvoiceDate
9/15/2011 - 5
InvoiceAmount
\$75.50 5
Routing
Route To:
Message:
☑ Perform OCR or text extraction for keyword searching.
OK Cancel

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

ImageQu	uest Connector for Windows Explorer	X
(į)	1 file successfully saved to ImageQuest.	
	ок	

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

#### **Microsoft Office Connector**

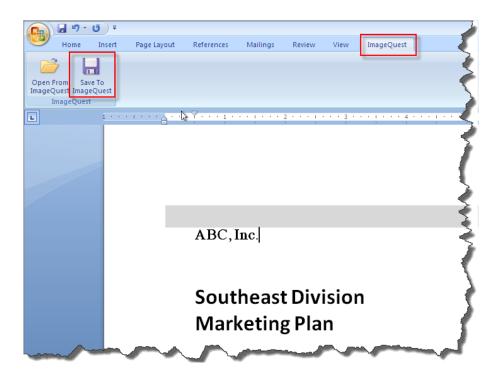
ImageQuest provides an add-in for several Microsoft Office programs which allows for sending and in some cases opening documents from ImageQuest. The following Microsoft applications are supported:

- Microsoft Word 2003 2013
- Microsoft Excel 2003 2013
- Microsoft Outlook 2003 2013

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 installs a new tab called "ImageQuest" in Microsoft Word and Microsoft Excel. Under the ImageQuest tab are two commands, one for saving files to IQ and one for opening files from IQ.

For example, create a Microsoft Word document that you wish to save in IQ as displayed below. Click the ImageQuest tab to see the available commands in the ribbon and click "Save to ImageQuest".



The "Save Changes" window appears allowing the user to "Add a Revision" or "Create a New Document" as demonstrated below. 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.

Bave Changes	
What would you like to do with the changes made to the current file?	Fill in the information for this document in the fields below. Document Type Appointments
Save your changes as a new revision to the existing document.	DocumentGroup ORLANDO - 5
Create a New Document Save the current file as a new document. Route To:	CustomerName ABC, Inc. 🕤
ార Message:	
	OK Cancel

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

Ca	🗐 🔊 -	(j) =								
9	Home	Insert	Page Layout	References	Mailings	Review	View	ImageQuest		
	3									<b>`</b> `
Open	_	ve To								<b>~</b>
Image	Quest Imag	eQuest								•
	ImageQues	τ								
ſ	Open from	n ImageQue	est							
	<u>Å</u>		2							٢
	Search W	atch List W	/ork Queue							
										2
										<b>X</b>
										Results:
									Open	Cancel
		-	-	- man		-		-	a second	and the second
	7									

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

									-
Home	Insert	Page Layout	Reference	s Mailings	Review	View	ImageQuest		
õ .									
en From Sav	ve To								
igeQuest Imag									)
ImageQuest	t	M Search					-		
Open from Ir		Keyword search o	iteria:						
Open non in	nageQue							5	
69		Custom Search	Saved Quer	ies					
Search Wate	ch List W	Document types t	o include:	Appointments				-	
		Enter values for a		vou wish to searc	h for:				
		DocumentGroup							
				× 5	or			+ ti	
		CustomerName							
		ABC, Inc.		•	or			5	
		CreateDateTime		- 💮 to				• 💮 to	
		PageCount		• 🕘 0	to				
		ligecount		5	to			- 5	
									Results
									Cancel
		Clear					Search	Cancel	
									· · · · /

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

Open fr	om In	nageQu	est							- • •
Â		2	-							
Search	Watc	n List V	Vork Qu	eue						
Docum	entTy	pe IN (	'Appoint	tments') AND	(CustomerNa	me = 'ABC, In	ic.')			
×	1			CreateDat	PageCount	Document	Document	CustomerN		1
			2	1/3/2013 4:		Appointments	ORLANDO	ABC, Inc.		
							1			
							145			
										Results: 1 of 1
										Nesons, I OI I
									Open	Cancel

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.

💾 Save Changes	
What would you like to do with the changes made to the current file?   Add a Revision Save your changes as a new revision to the existing document.  C Create a New Document Save the current file as a new document.	Fill in the information for this document in the fields below. Document Type Appointments • DocumentGroup ORLANDO • • • CustomerName ABC, Inc. •
Route To:	
Message:	
	OK Cancel

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

🕼 IQdesktop - ImageQuest		- • •
<u>File Edit View Document Tools</u>	s T <u>a</u> bs <u>H</u> elp	
🛛 🕅 🖸 New Search Tab 📑 🕃	🔁 🦚 🤞 🥔 Refresh	
Tasks 🕂 🗶	A Search 🗴	
Search 🌣	🗄 📴 😰 🤤 💾 🌮 👍 🖂 🗽 🤔 🤔 🧭 🧭 Grid Edit 🕴 🚍 📾 🙀 😓 🧮	
Keywords:	DocumentType IN ('Appointments')	
5	Drag a column header here to group by that column	
DocumentType		
- to	Image: CreateDateTime         PageCount         Document         Document         CustomerN           Image: CreateDateTime         PageCount         Document         Document         CustomerN	
InvoiceDate		
· · · · · ·		
Customize Advanced Search		
🗂 My Work 🛛 🕆		
Indexing Queue		
Work Queue		
Watch List		
Work Queue Search		
4 Work Queue Search		
🔊 Import 🕆		
Import file:		Results: 1 of 1
	History	
Import		
🖌 Scan 🌼		1.1
	Action         Event Date         ▼         User Name           Revision         1/3/2013 4:23:31 PM         tjones	
😸 Scan to ImageQuest	Document revision 1 added.	
	Save 1/3/2013 4:23:31 PM tjones	
	Modified NeedsOcr from False to True           FileView         1/3/2013 4:19:40 PM         tjones	
	🔯 History 📮 Notes 🧳 Workflow History 🚰 Open Work Items	
User: tjones Cabinet: ImageQuest	Server: 2k8x64a.development.com	

Microsoft Word and Excel 2003 function the same as the 2007 and 2010 versions; however, the icons are located in the ImageQuest toolbar. See examples below.

🕎 Document1 - Microsoft Word	🕎 Document1 - Microsoft Word
Eile Edit View Insert For	ⁱ <u>F</u> ile <u>E</u> dit <u>V</u> iew <u>I</u> nsert Fg
i 🗅 💕 📕 🖪 🔒 🎒 🚳	i 🗅 📂 🖬 💪 🔒 🚳 🕰
: 🕒 🏓 💂	: 💾 💽 💂
Save to ImageQuest	Open from ImageQuest
ű l	ũ là chiến thế thế

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

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

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

💽 I	nbo	ox - Mi	crosoft (	Outloo	ok	
<u>E</u> i	le	<u>E</u> dit	<u>V</u> iew	<u>G</u> o	<u>T</u> ool	
6	) <u>Ν</u> ε	w 👻	وا چ	$\times$	🙈 <u>R</u>	eply
Se	nd t	o Imag	geQuest			
16	3	Entire	Email			
- 4	3	Attach	iments (	Dnly		
6	<b>}</b>	Optior	ns			13
	2	Unread	i Mail			

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 on the following page. Click the "OK" button when finished.

👆 Send To ImageQuest	×
ImageQuest Test	
Select Document Type	
Invoice	-
DocumentGroup	
ORLANDO	• 5
CustomerName	
ABC, Inc.	- 5
InvoiceDate	
4/12/2010	• •
InvoiceAmount	
\$56.25	•
Routing	
Route To:	
·	5
Message:	
	-
Perform OCR or text extraction for keyword searching.	
OK Cano	el

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

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

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

Choose Attachments
DBLocation.doc  Doc1.doc  IQ DBL.doc
OK Cancel

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

🚯 Send To ImageQuest 🛛 💽
(3 items)
Select Document Type
Invoice
DocumentGroup
ORLANDO V
CustomerName
ABC, Inc.
InvoiceDate
1/1/2011 💌 🕁
InvoiceAmount
\$576.32
Routing Route To:
Message:
*
Perform OCR or text extraction for keyword searching.

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

The "Options" feature for Outlook allows the user to pre-define a Document Type and map certain message fields to ImageQuest attributes. Once configured, the values from the fields will populate the associated attribute in ImageQuest.

Configuration Set	tings 💽		
Cabinet: ImageQ	Quest Change		
Document Type:	Invoice 🔹 🗙		
Recipient:	Appointments		
From:	Invoice Main v2		
Subject:	MFP Scan		
Date:	Patient Health Record		
	OK Cancel		

# **IQprinter**

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

Printers and Faxes					
ile Edit View Favorites Tools H	lelp				
🌀 Back 👻 🕥 👻 🦻 Sear	ch 📂 Folders 🔢	-			
Idress 🍓 Printers and Faxes					💌 🔁 Go
Printer Tasks     Image: Comparison of the second sec		<b>S</b>			
Pause printing	Adobe PDF	Fax	HP Color LaserJet CM4730 MFP PCL 6	HP LaserJet 4345 mfp on infad1	
Rename this printer					
X Delete this printer					
Other Places	IQprinter				
Details 🛞					

? × Print Printer Name: IQprinter ¥ Properties \\infad1\HP LaserJet 4345 mfp Adobe PDF Status: Fax Type: HP Color LaserJet CM4730 MFP PCL 6 Where: Qprinte Microsoft Office Document Image Writer Comment: Print to File Microsoft Office Live Meeting 2007 Document Microsoft XPS Document Writer Print Range SnagIt 8 💿 All Number of Copies: 1 🕂 OPages From: O Selected Record(s) Setup... OK Cancel

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

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

💫 Print To ImageQuest	<b>—</b> ×-
Select Document Type	
Invoice	*
DocumentGroup	
ORLANDO	* ts
CustomerName	
ABC, Inc.	5
InvoiceDate	
1/15/2011	* t
InvoiceAmount	
\$766.00	5
Routing	
Route To:	
	* ti
Message:	
	Û
Perform OCR or text extraction	on for keyword searching.
	OK Cancel

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



Note: Users must have the "Add Document" permission in order to use IQprinter.

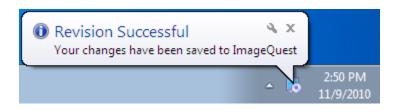
#### **ImageQuest Assistant**

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

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

Add Revision to ImageQuest?	
ImageQuest has detected changes you like to save these changes as a	
Document Type	
Invoice	
DocumentGroup	
ORLANDO	* ts
CustomerName	
ABC, Inc.	5
InvoiceDate	
10/2/2009	* ts
InvoiceAmount	
\$538.50	5
Routing	
Routing Route To:	
	- to
Message:	
	×
	Yes No

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



# Page intentionally left blank



www.QLS.com/IQmfp © 2013 Informa Software. All Rights Reserved.

800-859-2203