ImageQuest

Administrator's Guide

Version 15.0

Copyright Information

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Welcome to ImageQuest!

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

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

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

ImageQuest Support
Local: (716) 852-2203
Toll Free: (800) 859-2203
Email: info@QLS.com
Website: http://www.QLS.com/IQmfp

Online Help Documentation

At any time, online help may be accessed in the program by selecting "Help" in the IQ File menu.
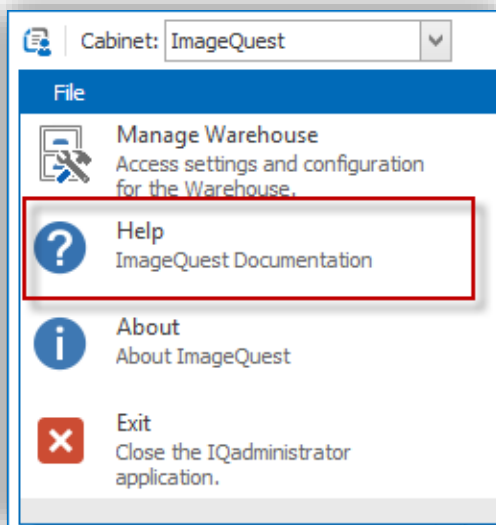
Manage Warehouse

To access IQadministrator after the server installation, go to Start > All Programs > Informa Software > ImageQuest > IQadministrator and enter the Administrator password. If this is the first time running IQadministrator, you will be prompted to create the password. Click "Login" as illustrated below.
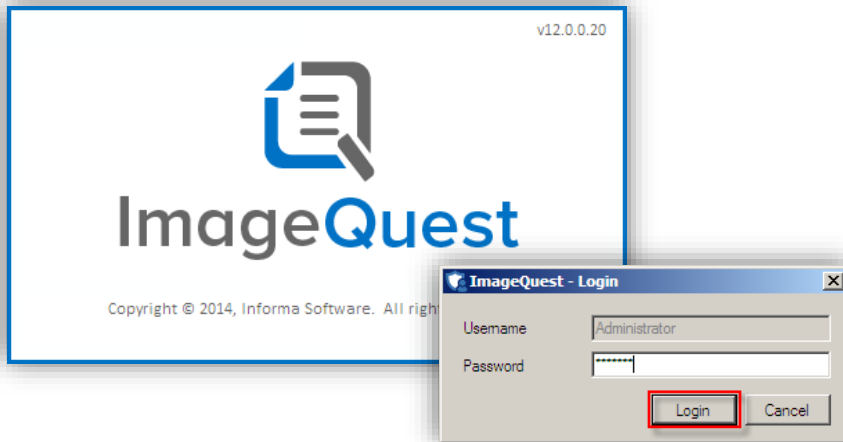
The main *IQadministrator* screen will open as shown below. Go to the "File" tab and click "Manage Warehouse".
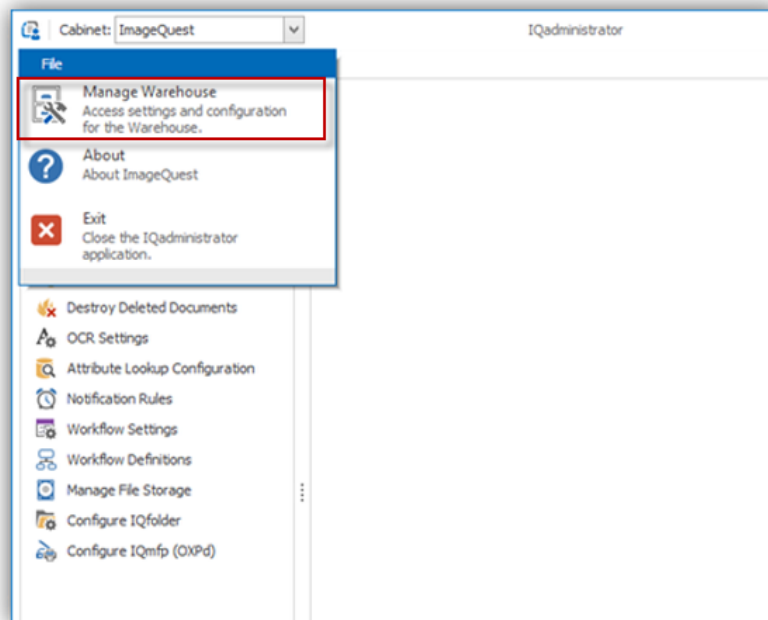
The following features may be accessed from the "Manage Warehouse" window: Manage Users, Manage Licenses, SMTP Server, and the Cabinet List as displayed below.
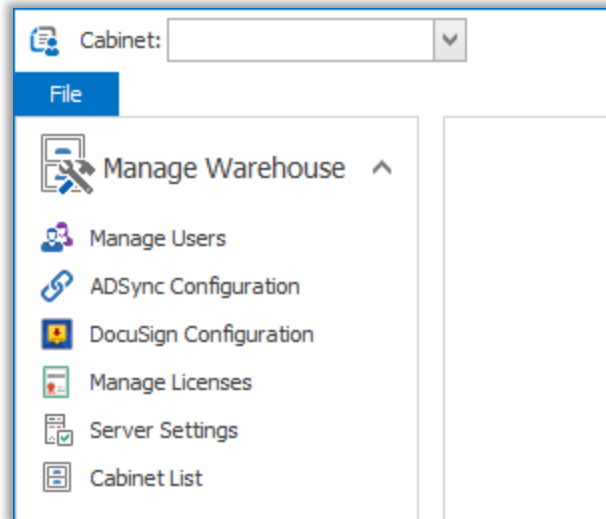
Manage Users

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

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

WAREHOUSE

Cabinet

Add New Users to Warehouse
Delete Users from Warehouse
Manage Cabinet membership (add/
remove cabinet assignment)
Manage User Passwords
Manage Authentication

Add New Users to Cabinet and Warehouse
Remove User from Cabinet
Manage Cabinet User Permission
Manage Cabinet Roles
Manage Cabinet User Document Permissions
Manage Cabinet Role Membership
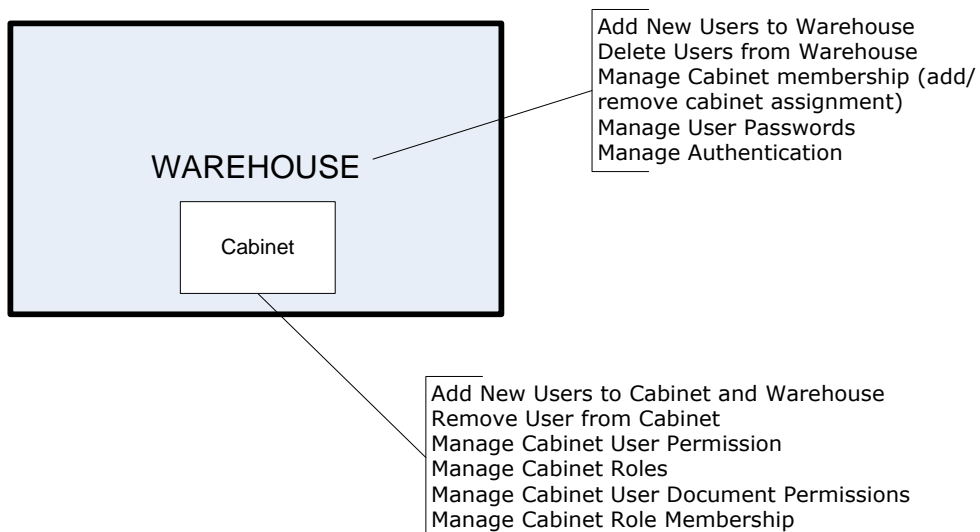
If a user is removed from a Cabinet, that user is still a member of the Warehouse. If a user is deleted from the Warehouse, that user is permanently deleted and removed from all Cabinets.

Manage Users allows the Administrator to change user passwords, login options and Cabinet access. The screenshot below shows an example of the Warehouse user list.
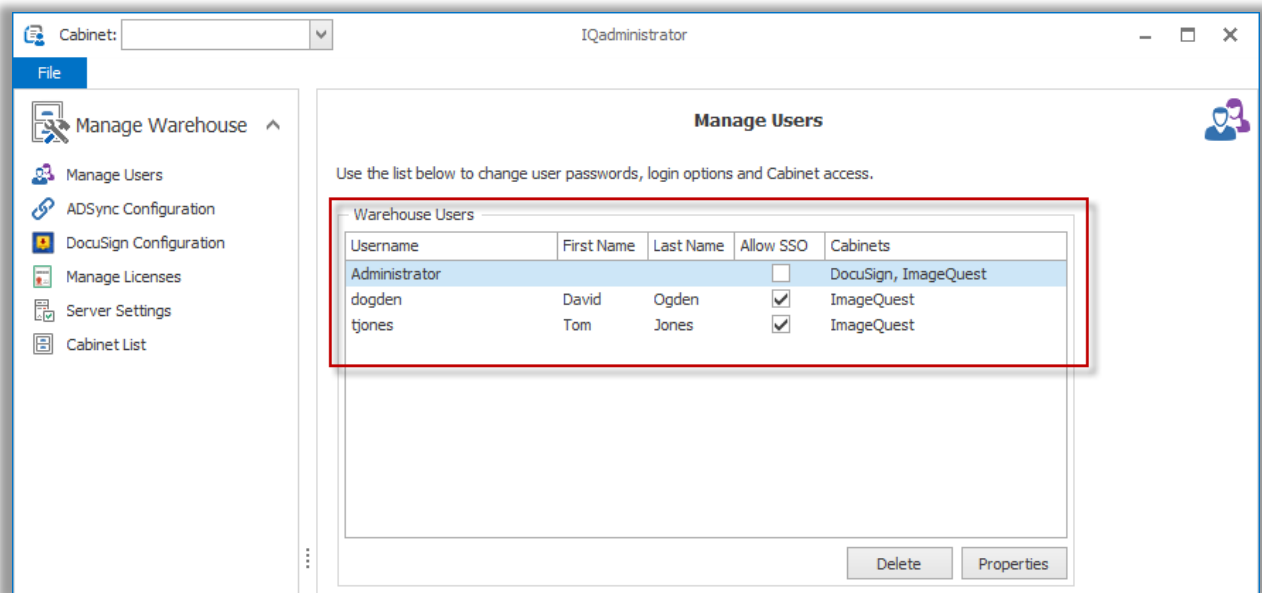
Note: The Administrator User is created by default with cabinet access and can be modified but cannot be deleted.

Adding New Users

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

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

See below for information about user options.

New User Information	Definition
Username	The name of a user assigned in the cabinet (i.e. "jsmith," "dogden")
First Name	The first name of the user
Last Name	The last name of the user
Password	An access code assigned to or established by a user (i.e. case sensitive, and a combination of letters and numbers).
Confirm Password	Verify the created password.
Allow the user to authenticate with their Active Directory credentials	Activates Single Sign-On (SSO) for a user which does NOT require a password.

Domain Name	Enter the network's NETBIOS domain name
Email Address	Enter the user's email address for routing notifications (i.e. jsmith@usacompany.com)
Send email notifications to this user	Activates document routing notification per user through ImageQuest.

Note: Routing notifications require further mail configuration. See the SMTP Server topic for more information.

Single Sign-On (SSO) Overview

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

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

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

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

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

Manage Users

Use the list below to change user passwords, login options and Cabinet access.
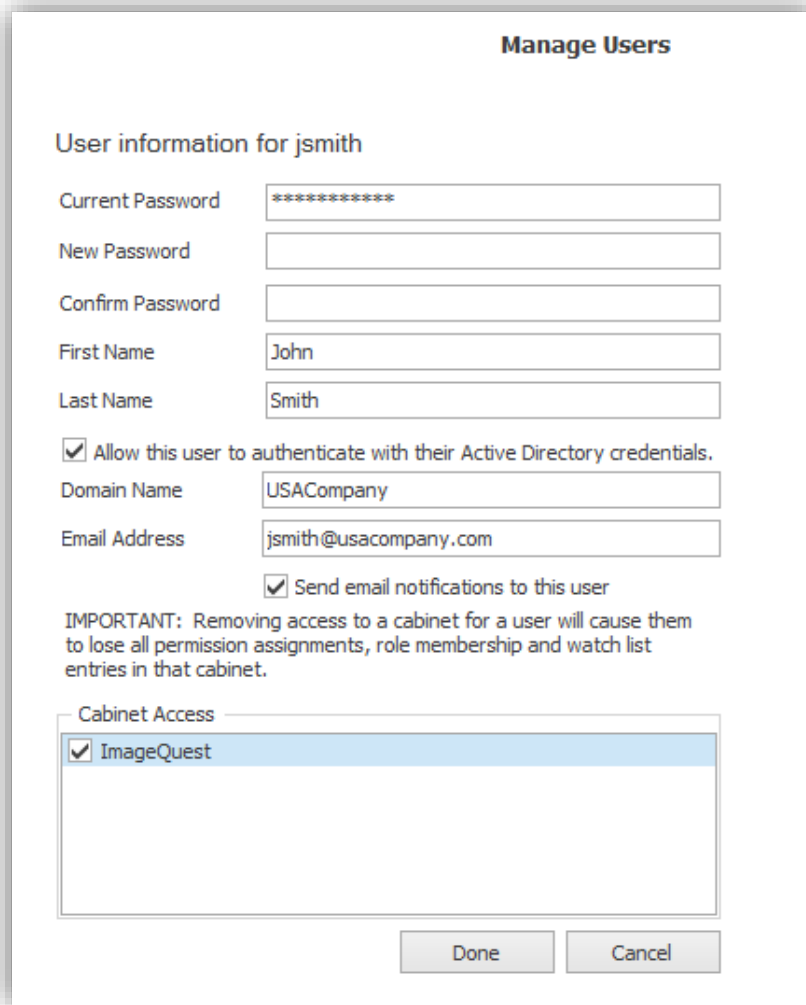
Warehouse Users

Username	First Name	Last Name	Allow SSO	Cabinets
Administrator			☐	ImageQuest
dogden	David	Ogden	☑	ImageQuest
jsmith	John	Smith	☑	ImageQuest
tjones	Tom	Jones	☑	ImageQuest

Delete   Properties

Manage User Information

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

Deleting a User

To delete a user from the Warehouse and from all Cabinets, highlight the username and click "Delete". Deleting a user from the Warehouse cannot be undone; this function will permanently delete the user and remove the user from all Cabinet assignments, role membership, permissions and the Watch List entries. You will be prompted with the message as illustrated below to confirm the user you intend to delete.
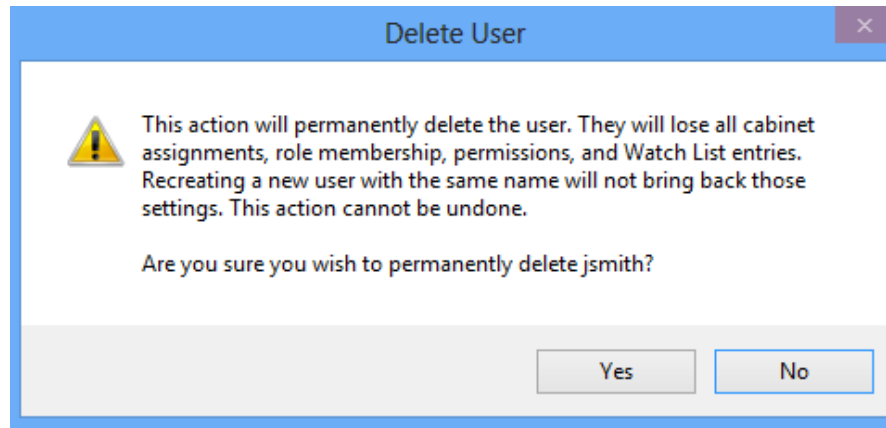
Note: A user can be added or removed from a cabinet, but still appear as a user in the warehouse. If the user is removed from a cabinet, he or she will no longer have access rights to the cabinet, and will not appear as a cabinet user.

ADSync Configuration

Administrators can use the ADSync Configuration to automatically synchronize Active Directory domain groups and OUs to roles within ImageQuest. The configuration is found in the Manage Warehouse section of the IQAdministrator application.

NOTE: The user that is logged into IQAdministrator MUST have the permissions to read the Active Directory Schema.

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From the ADSync Configuration menu, select **Add Link** to bring up the **Link Editor**.
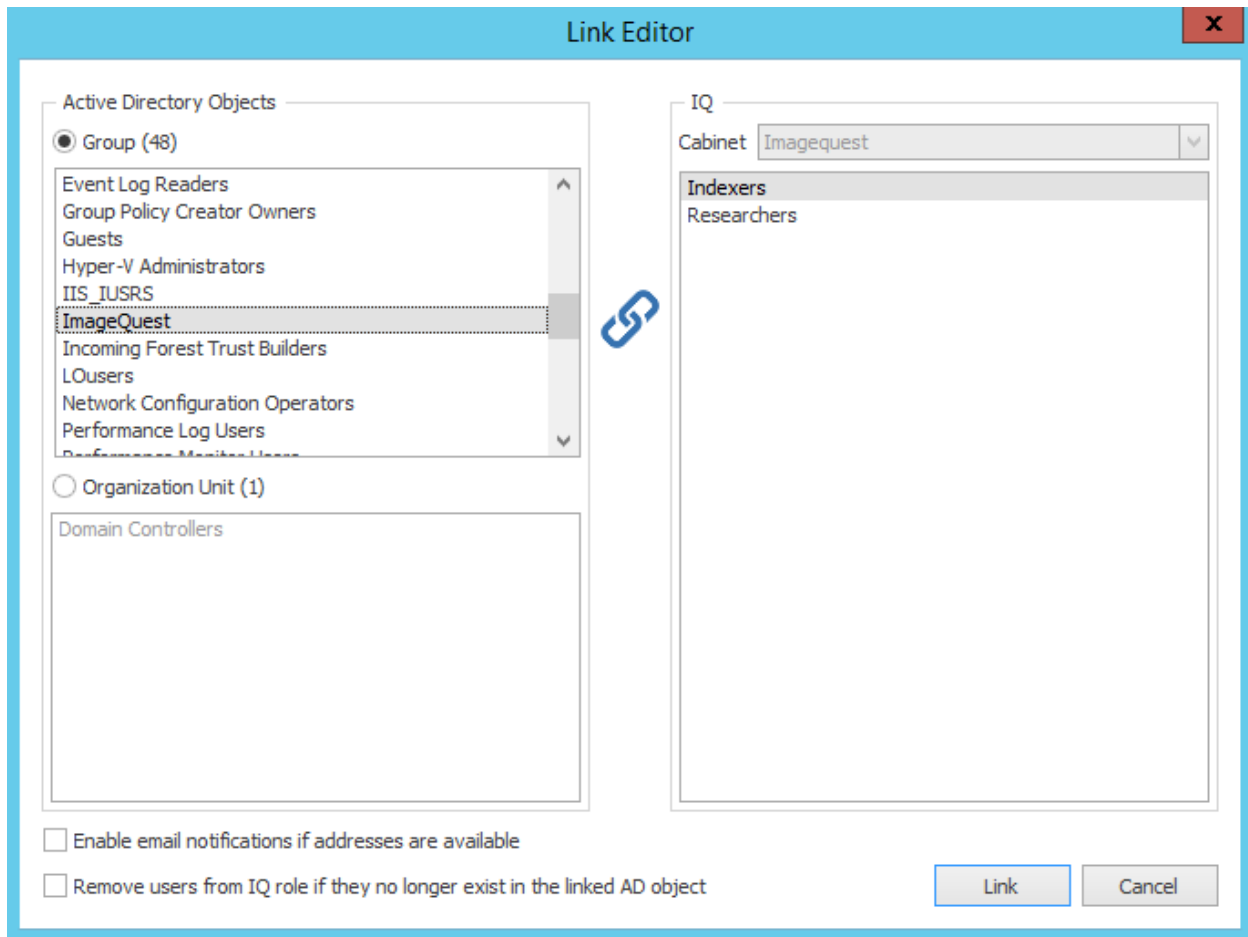
The **Link Editor** shows the Active Directory Objects and the IQ roles from both systems. Select an Active Directory Group or Organization Unit to link to a role within ImageQuest. In the example above, the "ImageQuest" Active Directory Group is selected in the Active Directory Objects. The IQ role "Indexers" will be linked to the "ImageQuest" Active Directory Group. Click the Link button to create the link.

(NOTE: One to many links can be created from a single AD Group to multiple IQ roles)

If "Enable email notifications if addresses are available" is checked, this will populate the user's email address from Active Directory with the email address ImageQuest uses for notifications.

Selecting "Remove users from IQ role if they no longer exist in the linked AD object" will remove users from the linked role in ImageQuest if they are removed from the group within Active Directory. It does not delete the user from ImageQuest.

(NOTE: If you sync an ImageQuest role to an Active Directory group, you will not be able to add none ADSync users to that role when using the remove option. They will be removed on the next sync.)

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If you have previously used the separate ADSync utility from an older version of IQ, your configuration can be imported using the "Import Config" button. After clicking "Import Config", browse to the links.xml file in the old ADSync program folder and click the "Open" button. All of the previous links will be imported into IQadministrator.

Once the configurations have been set, you can specify in hour(s) the amount of time between synchronizations. This time frame can be set to a decimal to sync faster than 1 hour if desired.

(For example: 0.25 hours equals every 15 minutes)

Once the Sync Interval has been set, use the Update Interval button to save the interval time.

Use the "Delete Link" button if the mapping is no longer needed. The "Edit Link" button will bring up the Link Editor window to make any changes to the mapping.

DocuSign Configuration

ImageQuest integrates with DocuSign, a world leader in electronic signature capture. With DocuSign integration enabled, users can send documents to be signed by anybody with an email address and signed copies will be retrieved and saved in IQ. There are two methods for creating documents for signature:

1. **DocuSign-Originated Documents** – Any envelopes (documents) created in DocuSign with appropriate metadata (such as Cabinet and Document Type) are automatically saved to IQ as new documents.
2. **ImageQuest-Originated Documents** – Existing documents in IQ can be sent for signature via DocuSign and the signed copies will be saved in IQ as revisions to the originals.

To use ImageQuest's DocuSign integration, you must have an appropriate DocuSign account (contact Informa Sales for more details) and link your account to ImageQuest. Our integration also works with demo accounts, so you can try the feature before you purchase a paid DocuSign plan.

To link your DocuSign account to ImageQuest, click on DocuSign Configuration under Manage Warehouse. From here, click the "Select Account" button, which will prompt you to provide your DocuSign account credentials. If your login is associated with more than one account, you will be prompted to select the appropriate account. Once your account is selected, your account information will display on the screen and you can **Save** your changes to begin using DocuSign.
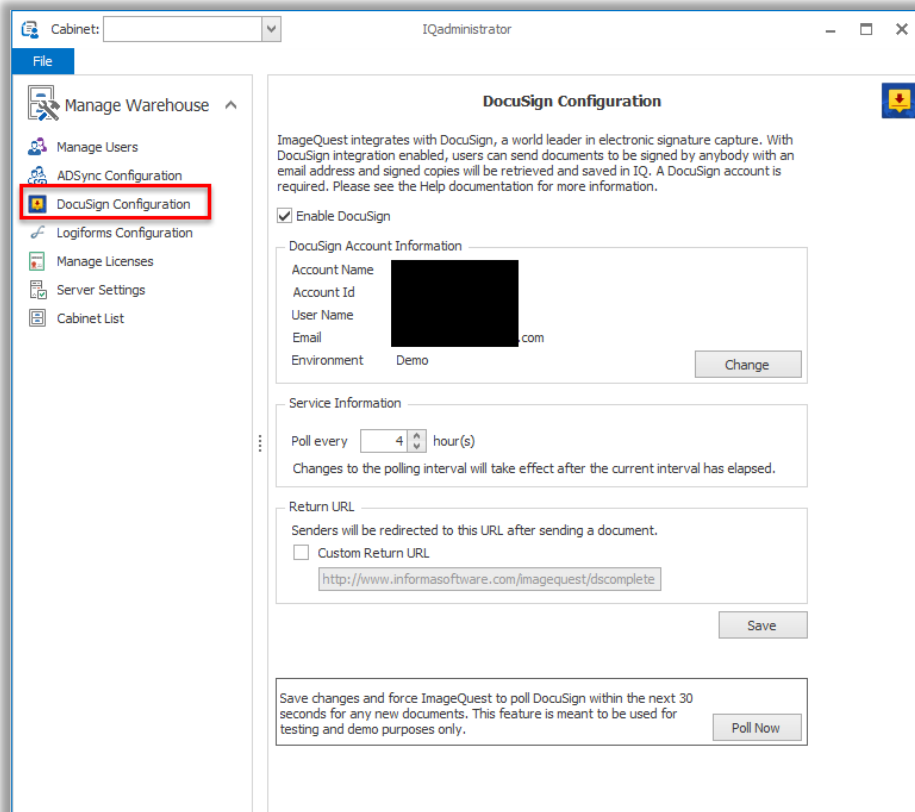
Service Information

By default, ImageQuest checks every 4 hours for signed documents which must be retrieved and stored in ImageQuest. This interval can be changed and the lowest recommended interval is one hour. While decimal values are supported, frequent polling can result in a DocuSign account suspension. Polling also occurs immediately whenever the IQ Application Host service is restarted. For testing, click "Poll Now" to save the configuration and force ImageQuest to poll DocuSign within the next 30 seconds for newly signed envelopes.

Signed documents are retrieved when DocuSign considers them to be in a "completed" state; i.e., all recipients have completed signing. Envelope creation and signing events are recorded in the IQ document history. If the document was originated in IQ, an email goes to the IQ user who sent the document for signature (if they are configured to receive email notifications), informing them that the document was signed and retrieved.

Some documents may be sent out but never get signed. The DocuSign account can be configured to expire documents after *x* day(s). ImageQuest will honor this expiration configuration and will not save expired DocuSign documents. In addition, recipients may decline to sign. In these cases, if the document originated in IQ, the document history will be updated accordingly and the IQ user who sent the document will be notified (if they are configured to receive email notifications). If the document originated in DocuSign, the document will simply never be saved to IQ.

Return URL

When a user sends a document through DocuSign from IQdesktop, they are taken to the DocuSign Sender Console. The Return URL shown on the configuration screen determines what web page the user lands on *after* sending the document through the Sender Console. You may use either the default URL or provide a custom URL.

Configuration for DocuSign-Originated Documents

Completed DocuSign envelopes, including those from templates and PowerForms, can be imported automatically into ImageQuest as new documents. When new documents are imported, ImageQuest attribute values can also be populated from document labels and recipient tabs on the completed envelopes.

Note: DocuSign-specific instructions may change as the DocuSign UI and feature set evolves. If you need further assistance, please consult the [DocuSign support documentation](#).

To import completed envelopes into ImageQuest, a document label for the cabinet information named "Cabinet" and a document label or tab for the document type named "DocumentType" must be created. The value for the "Cabinet" document label must be an exact case-sensitive match to the name of an IQ cabinet. The "DocumentType" label or tab must also have a value that matches an IQ document type. Envelopes will not be imported into IQ if these conditions are not met.

To create a document label, click on "Go to Admin" from the menu in the top-right in DocuSign. The user must have admin rights in order to choose this option. From here, click on Document Labels in the list on the left and then click "Add Label". The "Add Label" recommended configuration for a "Cabinet" is shown below. More information about document labels can be found at https://support.docusign.com/guides/ndse-admin-guide-document-labels.

It is strongly recommended that Document Labels for "Cabinet" and "DocumentType" be created as list-based labels in order to make document sending quicker and less prone to end-user typos.

To retrieve attribute values from an envelope, the envelope must contain document labels or tabs with label names that correspond to IQ Attribute names. To adjust the label name of a tab, drag any tab (field) onto a document before sending it. Next, find and adjust the value of the "Data Label" for this tab. The "Data Label" should be located on the right hand side of the screen. Its value needs to exactly match the name of an IQ Attribute in order for its value to be recorded in IQ. See the example below for the IQ Attribute named TextAttribute. More information about tabs can be found at https://support.docusign.com/guides/ndse-user-guide-field-types.

Templates
Using templates is highly recommended so that tab Data Labels can be configured once then used for many DocuSign envelopes. Default Document Label values can also be defined for templates.

PowerForms
PowerForms are created based on templates and behave accordingly to the templates' configurations. One key difference is that the Document Label values cannot be edited from the template defaults if a PowerFom is being used.

Other Notes
- Technically, the DocumentType Document Label does not have to be a Document Label. If the label does not exist on a template, ImageQuest will look for an envelope recipient tab data label with a value of "DocumentType" and attempt to use the value as ImageQuest's document type.
- If a Document Label and recipient tab data label share the same name of an IQ attribute, the DocuSign label value will be prioritized when populating the attribute.
- If a recipient tab data label shares the same name as a tab data label for another recipient on an envelope, ImageQuest will retrieve the value from the first recipient on the envelopes.
- It is recommended to add validation to DocuSign tabs (such as numeric, SSN masking, etc.) to ensure that the value captured in DocuSign is compatible with the type of data enforced in ImageQuest.

- For radio buttons, the "Group Label" must match the ImageQuest attribute name and the selected "Radio Button Value" will be saved into IQ as the attribute value.

Please contact Informa Sales with any further questions about DocuSign configurations.

Logiforms Configuration

ImageQuest integrates with Logiforms, a leader in online form design and data collection. With Logiforms integration, online forms created and distributed through Logiforms will, upon completion, be retrieved and saved in ImageQuest. Data from these online forms can be mapped to ImageQuest attributes, allowing for easy data querying and management.

To use ImageQuest's Logiforms integration, you must have an appropriate Logiforms account linked to ImageQuest. A trial of a paid Logiforms account may also be used. (Contact Informa Sales for more details.)

Note: In this section, "form" refers to a Logiforms form.

Creating a Logiforms Form for Integration

Note: Logiforms-specific instructions may change as the Logiforms UI and feature set evolves. If you need further assistance, please consult the [Logiforms User Manual](#).

This section will review the requirements in Logiforms for integration with ImageQuest. In general, a form can be exported to ImageQuest if

- The form has both "Cabinet" and "DocumentType" field names that map to a Cabinet and Document Type in ImageQuest, respectively, and
- The form is configured to generate a PDF attachment, and
- The form field names map to ImageQuest attribute names.

The following instructions use a Purchase Requisition Form as an example.

Configuring Cabinet and Document Type for a Form

For a form to export to ImageQuest, it must have "Cabinet" and "DocumentType" fields. In the example below, the form has a hidden text field with a *Field Name* of "Cabinet" and a default value of "ImageQuest." This allows the form to map to an ImageQuest document type in the "ImageQuest" cabinet. Similarly, the form has a hidden text field with a *Field Name* of "DocumentType" and a default value of "Purchase Requisition." Therefore, retrieved form submissions will map to a "Purchase Requisition" document type in the "ImageQuest" cabinet.

Note: It is recommended that "Cabinet" and "DocumentType" fields be hidden for most use cases, as form submitters should not often have to provide information about how the form maps to ImageQuest.


Configuring Form Fields to Map to ImageQuest Attributes

Individual fields on a form are mapped to ImageQuest attributes by convention: the field name must match the ImageQuest attribute name. If a field name does not map to an ImageQuest attribute, it will be ignored by ImageQuest. This section will review some basic mappings.
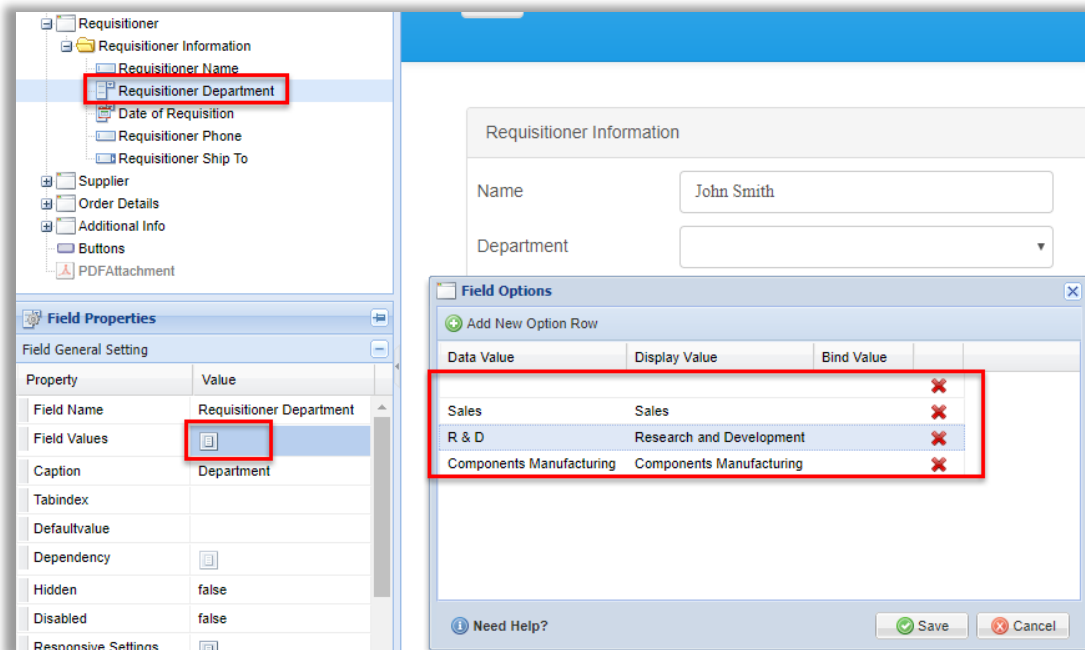
Text Field Mapping to a Text Attribute

In the example below, a text field is mapped to the "Requisitioner Name" text attribute on the Purchase Requisition document type in ImageQuest. This is done by setting the *Field Name*. Note that the *Caption* is for display purposes only and is not used in mapping.
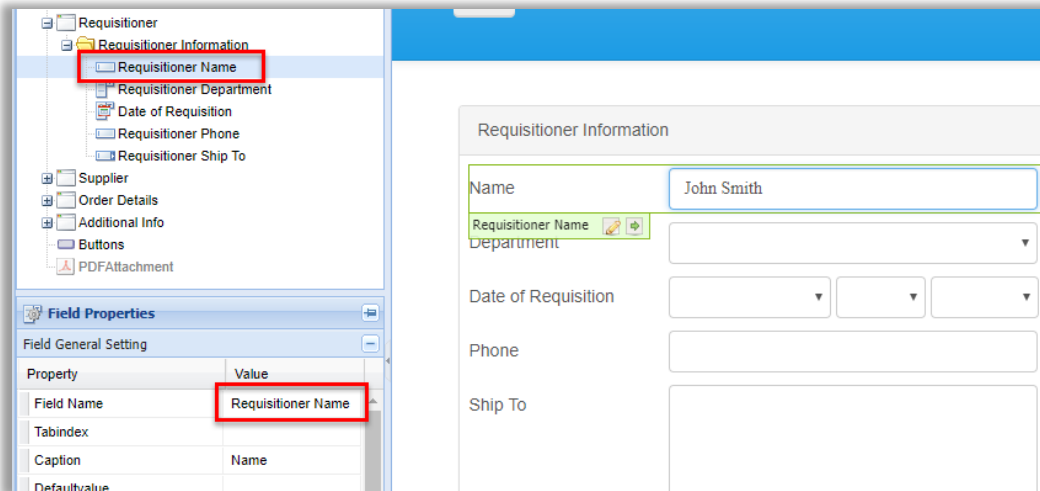
Dropdown Mapping to a List Attribute

In the example below, a dropdown field is mapped to the "Requisitioner Department" list attribute on the Purchase Requisition document type in ImageQuest. The options in the dropdown are set using the *Field Values* feature, where each *Field Value* is given a *Data Value* that maps to an item in the ImageQuest list attribute.

Mapping to True/False Attributes in ImageQuest

For technical reasons, checkboxes in Logiforms currently cannot map to True/False attributes in ImageQuest. Therefore, we recommend using dropdowns to collect True/False data by supplying a dropdown that has *Data Value* options of "True", "False", or [blank]. In the example below, the dropdown is mapped to the "Expedited" True/False attribute on the Purchase Requisition document type in ImageQuest. The *Data Value* options are "True" and "False" with display values of "Yes" and "No", respectively. The same procedure can be followed to configure mapping to True/False attributes for a Radio Button Group on a form.


Other Mapping Notes

While not covered here in detail, integration supports mapping of all ImageQuset attribute types, such as Integer, Number, and Date & Time.

Configuring PDF Generation

ImageQuest requires that an underlying PDF document be collected along with any fields mapped to ImageQuest attributes. This can be advantageous in that there may be form data that is shown on the PDF but not collected in attributes, or vice versa.

The example below walks through configuring a simple PDF generation template that puts all form fields and values on a PDF. Logiforms offers many options for formatting and customizing PDFs beyond this simple approach.
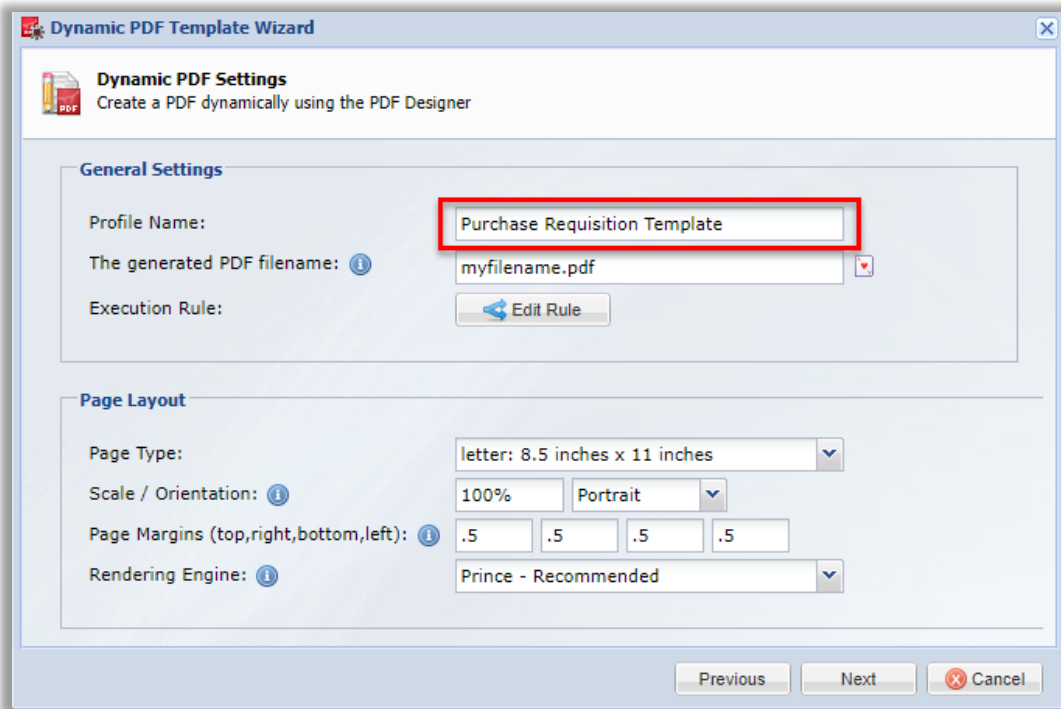
First, open "PDF Generation Tools," select the desired form, and click "Create New Template."
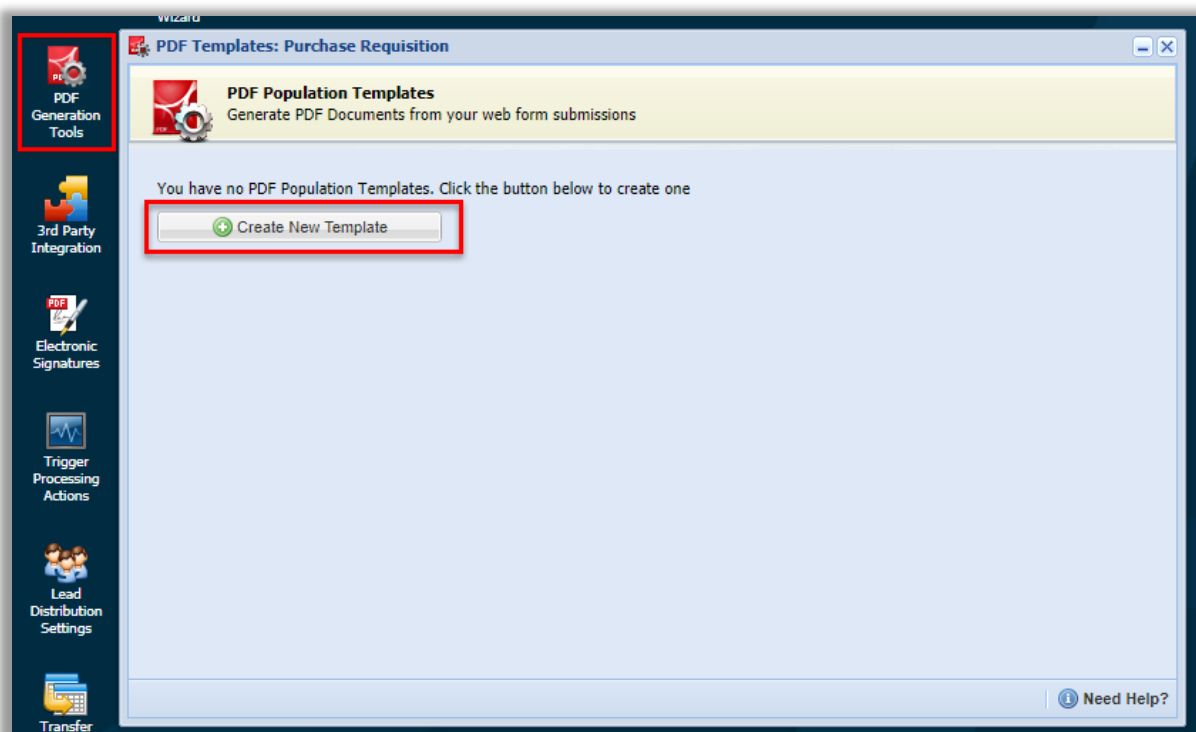
Click "Next" on the first screen of the "New PDF Template Wizard" and then select "Dynamic PDF Template."
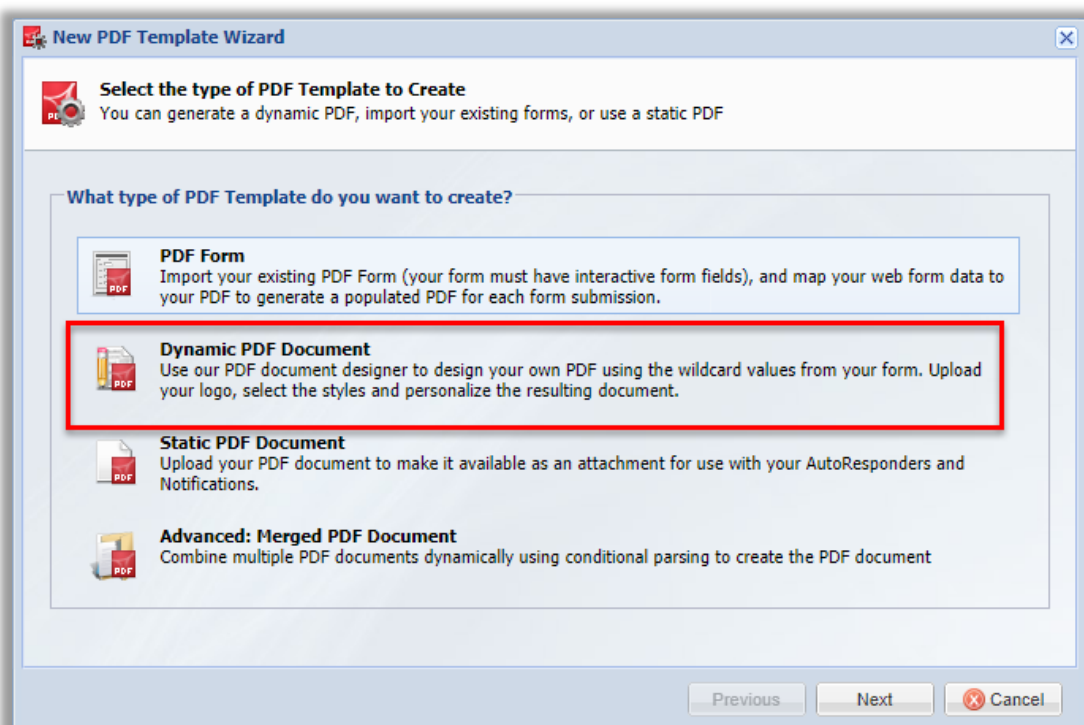
In this example, we set the "Profile Name" of the template to a user-friendly name and leave other options with their default values. The "Profile Name" does not appear in ImageQuest.

On the next screen, a new PDF Form Field is created. This invisible field exists on the form and holds the generated PDF attachment. There are no requirements regarding what the field name must be.

Skip the screen for PDF encryption (ImageQuest cannot import password-protected PDFs). On the final screen, click the "Edit Document Body" button, which brings up the PDF Editor. For this example, click the *Wildcards* option on the toolbar, select "Insert All WildCards," and click *Insert*. This inserts a table of form field values into the editor. Click *Save* in the editor and then *Finish* in the main wizard. Completed forms should now generate PDFs that can be exported to ImageQuest.
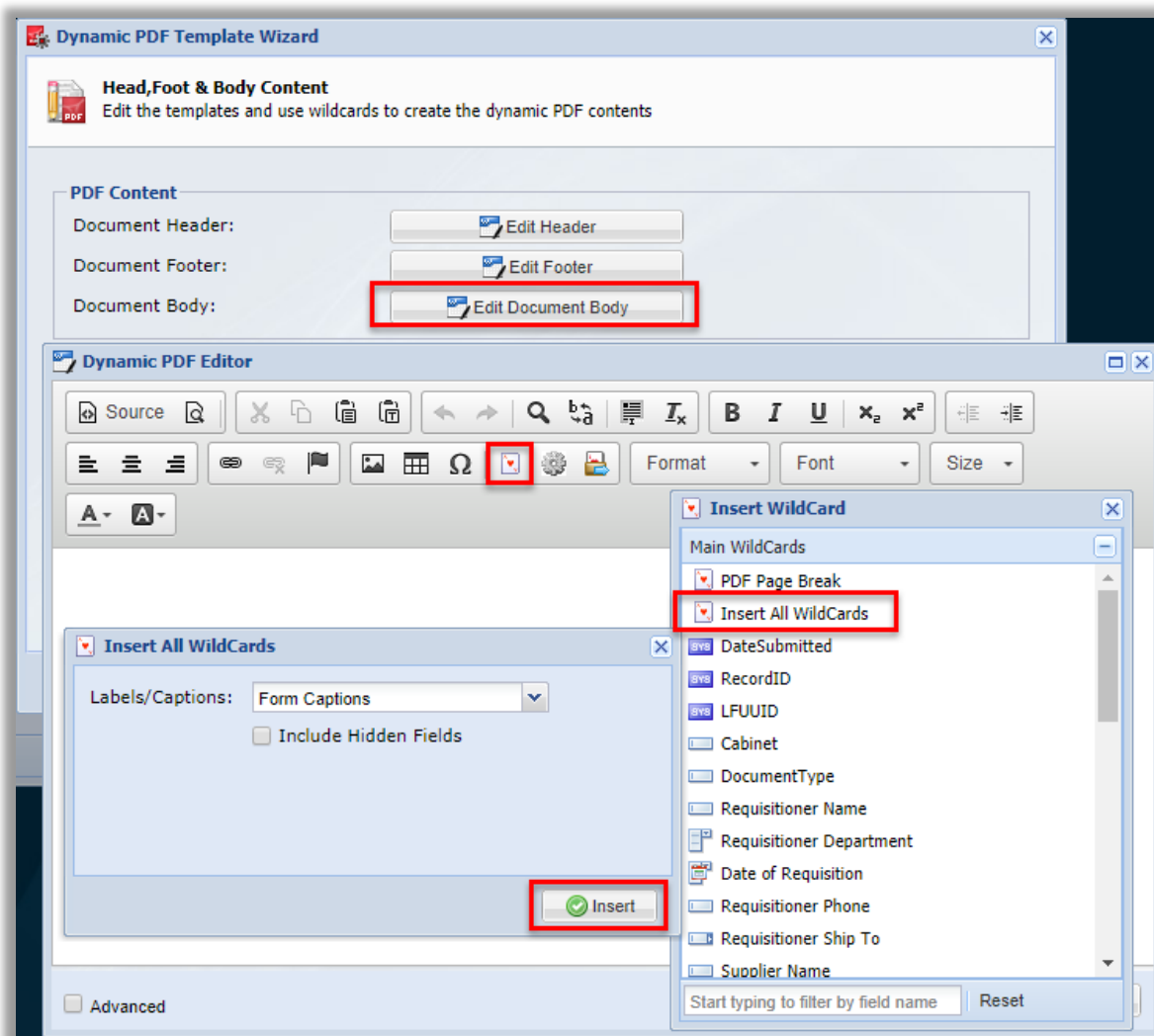
ImageQuest Configuration for Logiforms

To integrate ImageQuest and Logiforms, you will need your Logiforms API Key Access Token. To find your token in Logiforms, go to *My Account > API Access*. (If API access is not enabled, you can enable it on this screen.) Next, in IQAdministrator, go to File > Manage Warehouse > Logiforms Configuration. Paste the API Key into the given field and provide the API Base URL (https://forms.logiforms.com/api/1.0/form/ as of writing). You may also configure the interval on which the ImageQuest service polls Logiforms for completed form submissions. Click the *Save* button to validate and save the configuration. For testing, click "Poll Now" to save the configuration and force ImageQuest to poll Logiforms within the next 30 seconds for newly completed forms.

Testing Logiforms Integration

In the Logiforms Dashboard, hover over the desired form and select "Open form in a new window." Complete the form and then wait for the duration of the interval configured in IQAdministrator (or use the "Poll Now" button). The generated PDF should save to ImageQuest along with any mapped attribute values.
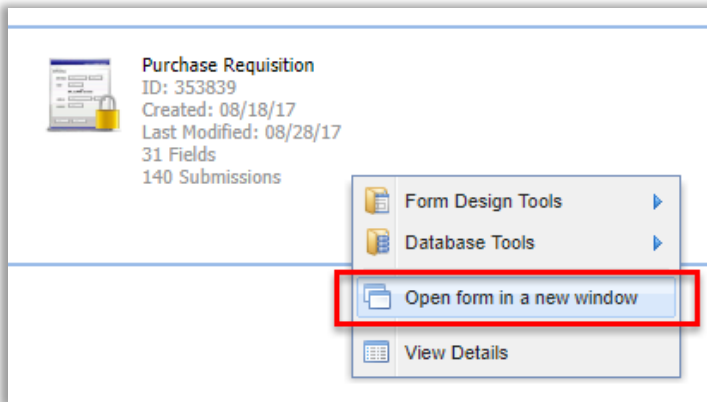
Manage Licenses

The ImageQuest Warehouse accommodates multiple license keys. To view and manage license information in the Warehouse, click Manage Licenses. The "License Status" tab displays information on your installations. When ImageQuest is first installed, there is a 15-day trial period for all modules. If you have requested and received an extended trial license key from Informa Software Support, click "Extend Trial" and enter the extension key. See screenshot below.
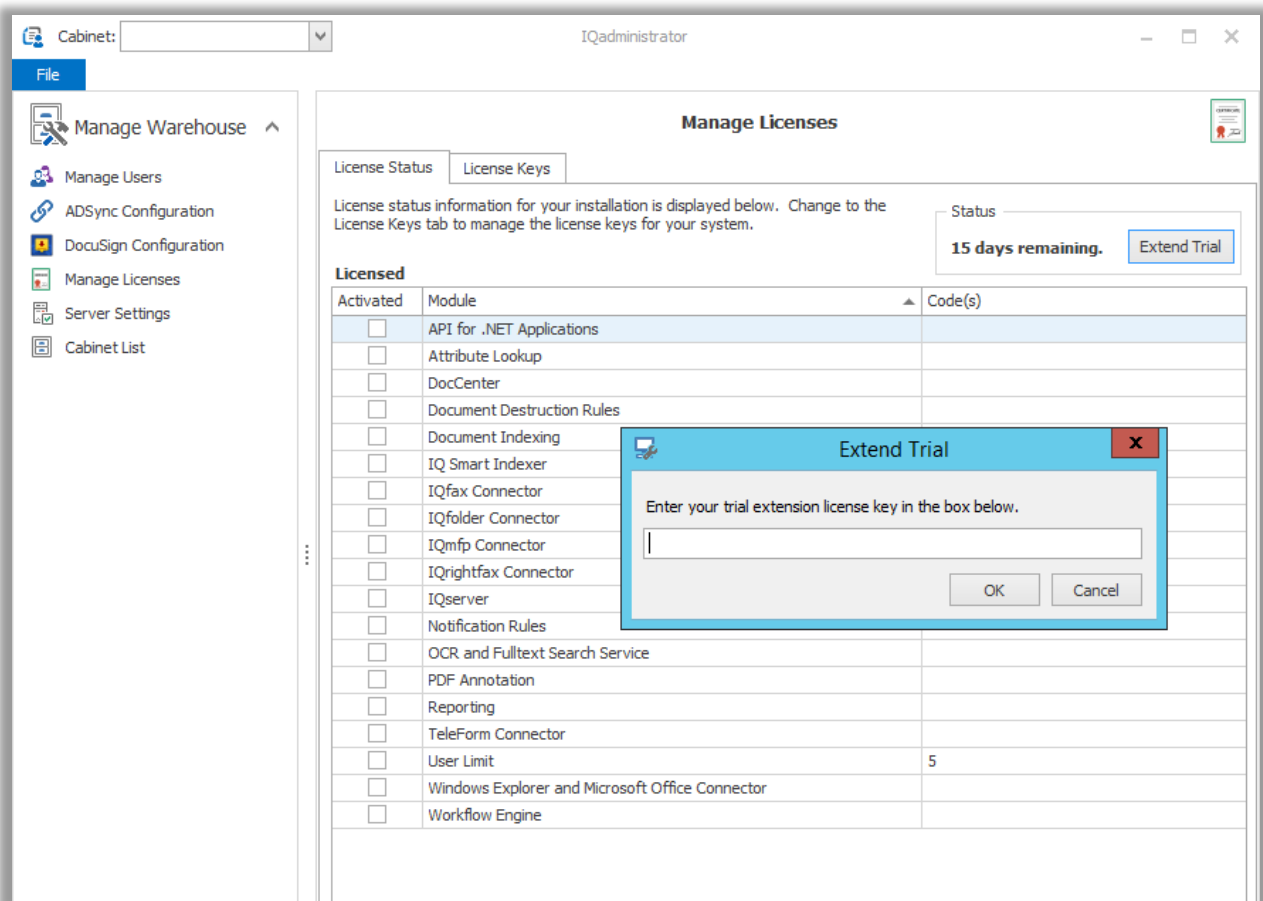
Note: The "Extend Trial" feature is only available on the ImageQuest server machine, not on the ImageQuest client machine.

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

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

Click the "+" and "-" boxes to expand or collapse the list of features in the Warehouse that are licensed. In the screenshot below, license keys have been entered by both "Informa" and "Demo" users. "Entered by" reflects which Windows user added the key.

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

Server Settings

SMTP Settings

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

The SMTP Settings feature is available in IQadministrator under File > Manage Warehouse > Server Settings.

WebIQ Settings

The WebIQ Setting allows the administrator to configure the web address for links to WebIQ included in email messages.

Cabinet List

The **Cabinet List** displays the current ImageQuest Cabinet information. To access the **Cabinet List** window, click **Cabinet List** in the "Manage Warehouse" menu as shown below. To create a new cabinet, please contact the ImageQuest support team.
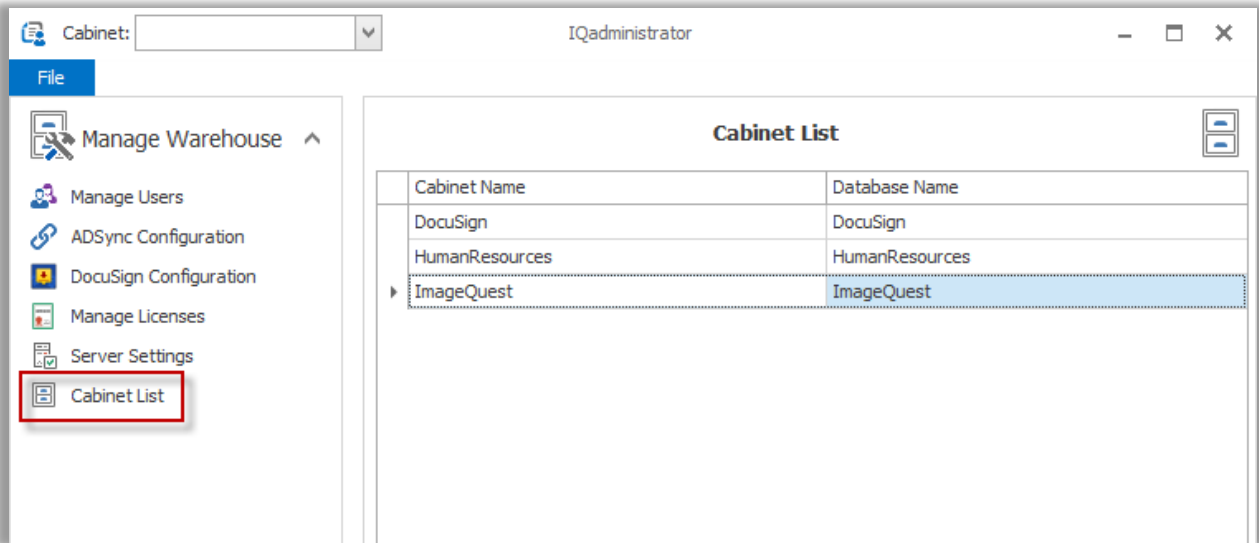
Manage ImageQuest

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

To return to Cabinet Management from the Warehouse, click the drop-down arrow next to "Cabinet" and choose **ImageQuest** or the Cabinet name from the list as shown below.
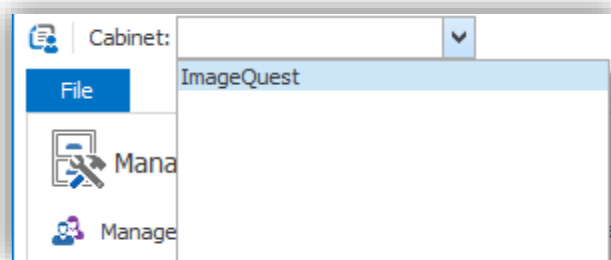
Manage Users and Roles

To add a new user in the ImageQuest Cabinet, select **Manage Users and Roles** as shown below.
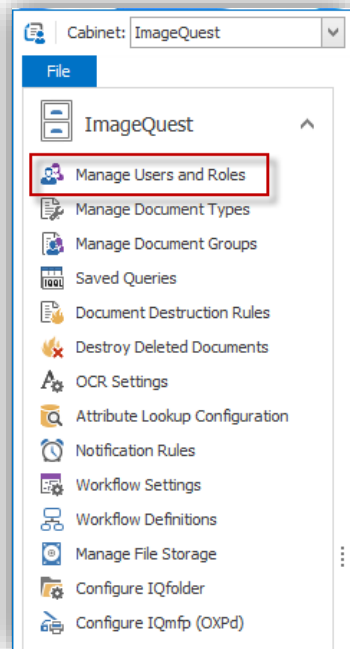
Any users that have been added through the Warehouse and are members of the ImageQuest Cabinet will be listed in Cabinet Users as displayed below.

Note: When a new user is created in the Cabinet, the new user is also created at the Warehouse level.
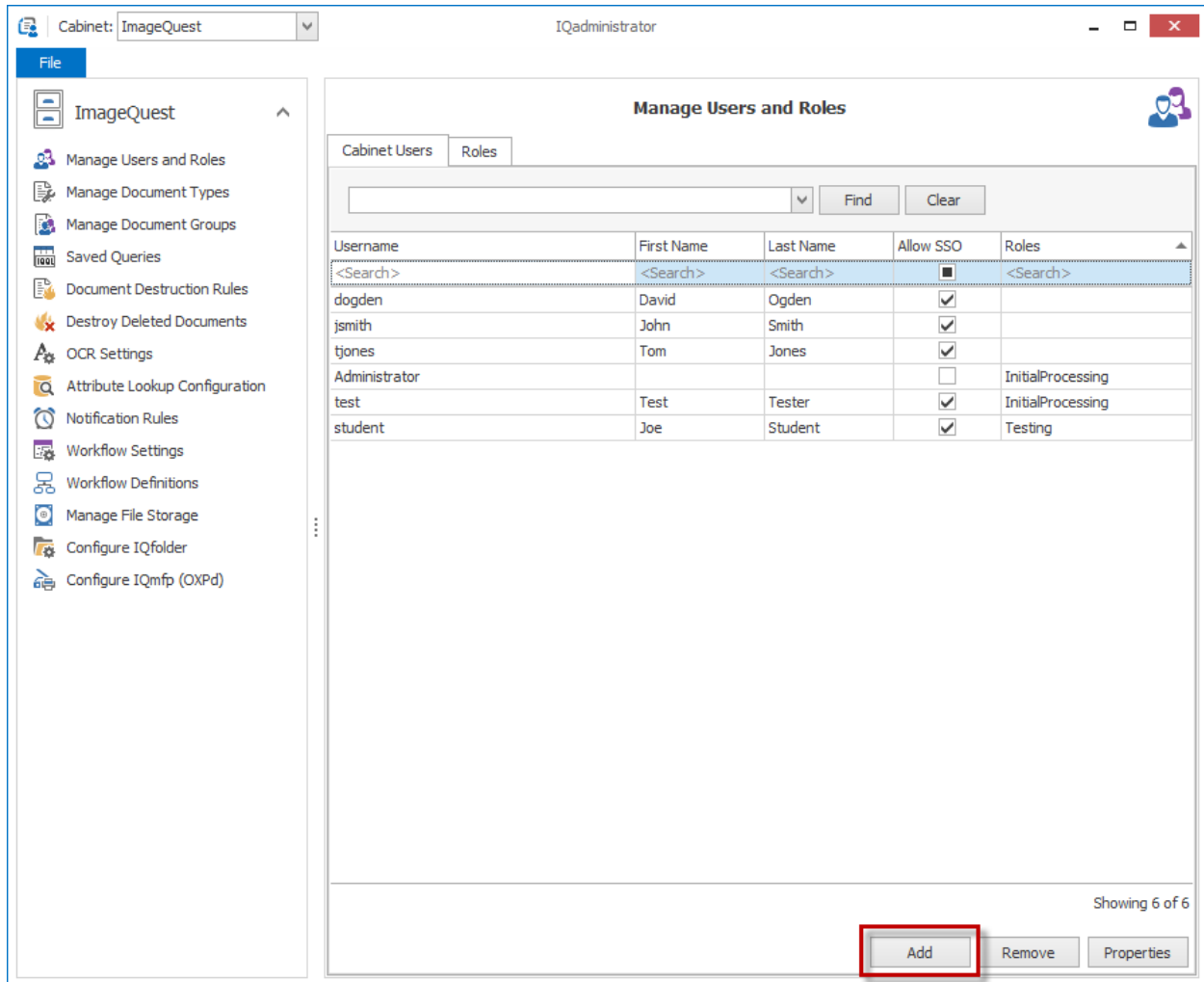
Click "Add" as shown above to add a new user to the Cabinet. An existing user can be chosen from the Warehouse list or a new user can be created at this time.

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

Review **New User Information** in the Adding New Users topic before entering new user information in the fields shown below.
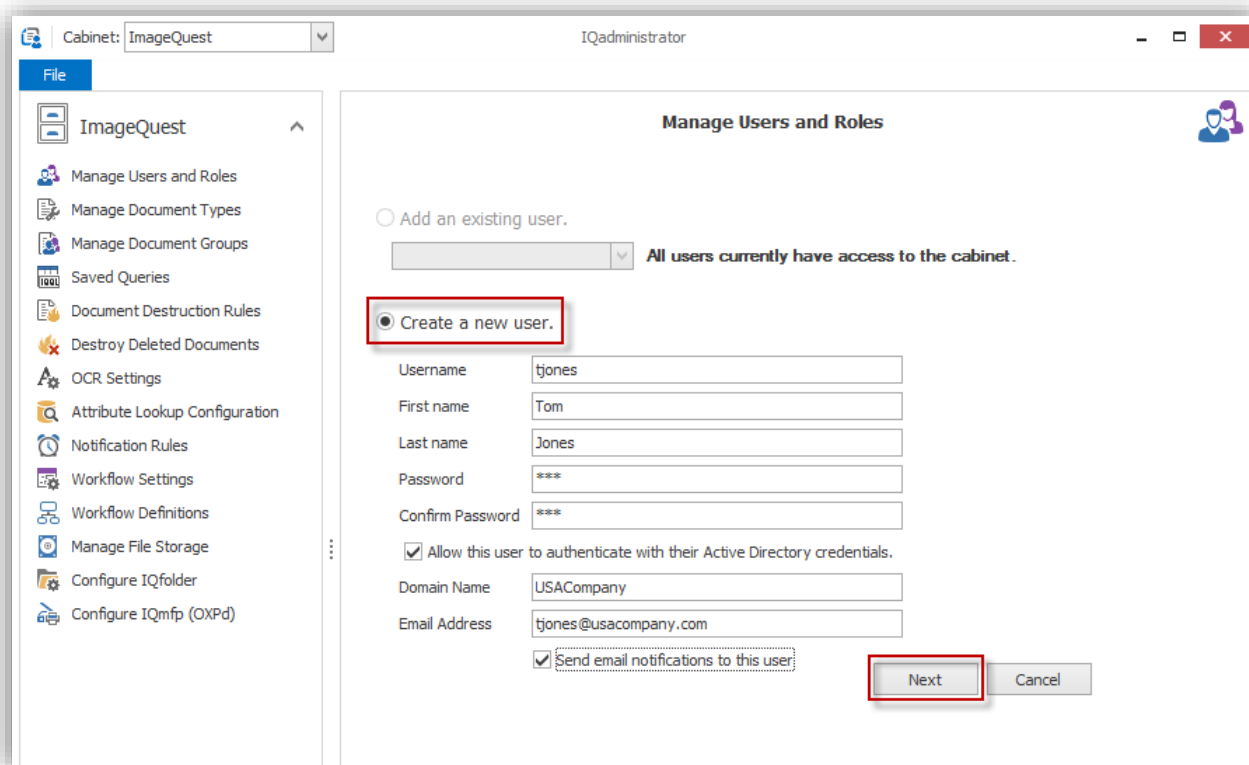
Note: If the user will authenticate with their Active Directory credentials, the Username must match the user's Active Directory login name. SSO is selected by default. Uncheck the checkbox for Active Directory credentials to deactivate SSO for a user and specify a password for the user instead; blank passwords are also allowed for non-SSO users.

New User Properties and Permissions

ImageQuest features the following action permissions for users and roles:

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

Once a new user is created, the new user's "Action Permissions" are "Not Set" by default as highlighted.
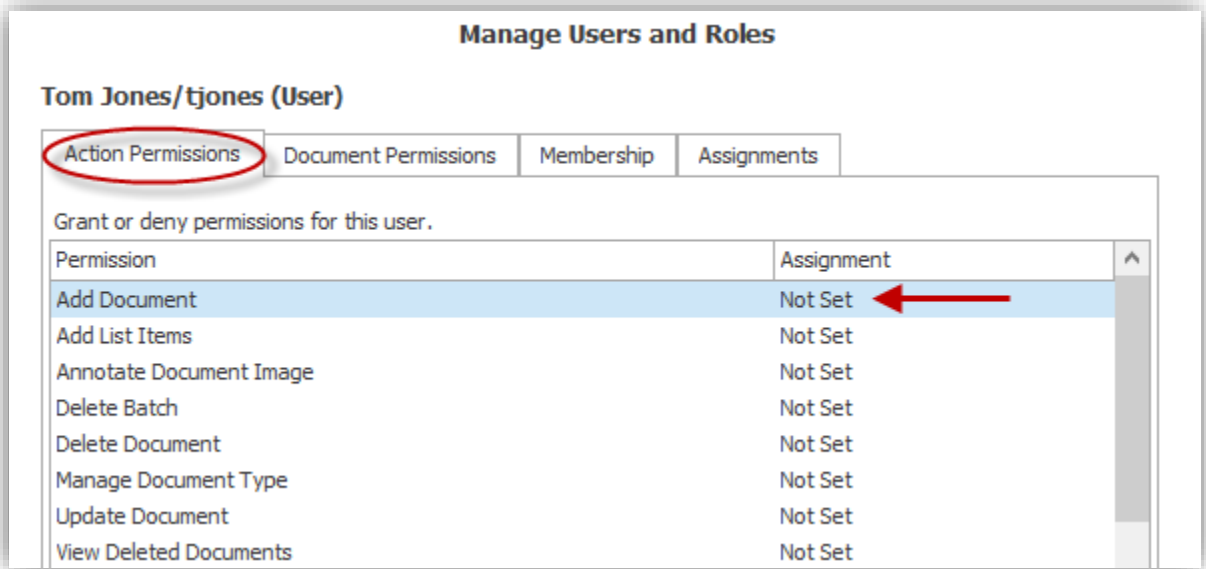
Note: The Administrator user's Action Permissions are all set to "Allow" by default except for the View Only Permission.

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

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

Permissions can be set for each user by right-clicking to select the assignment or by left-clicking to activate the assignment drop-down as shown in the examples below.
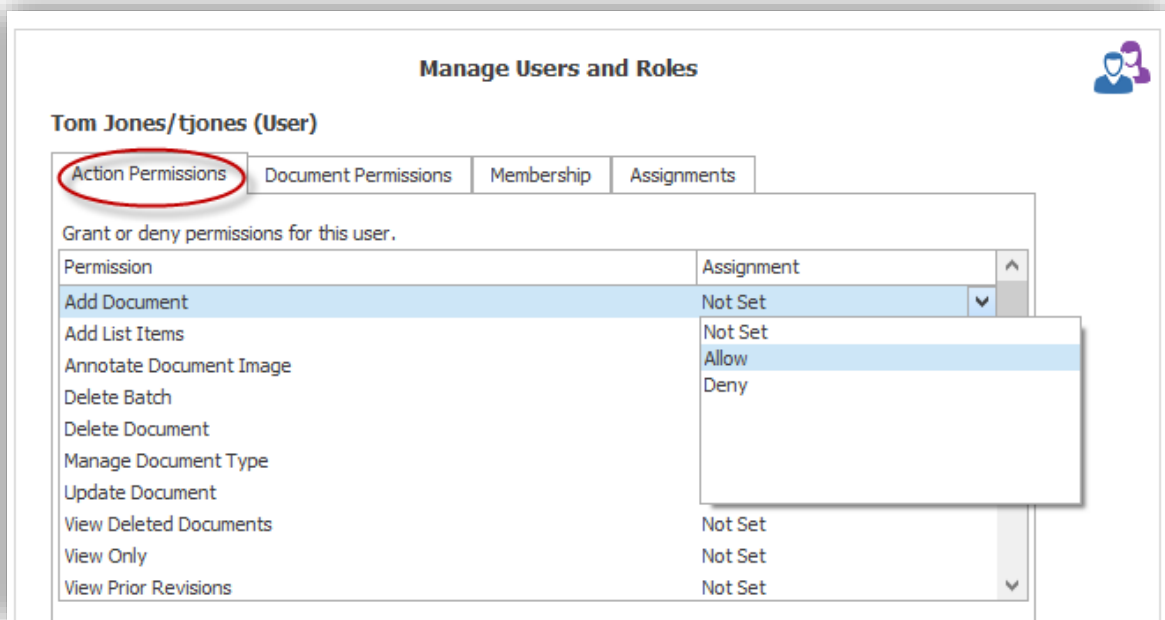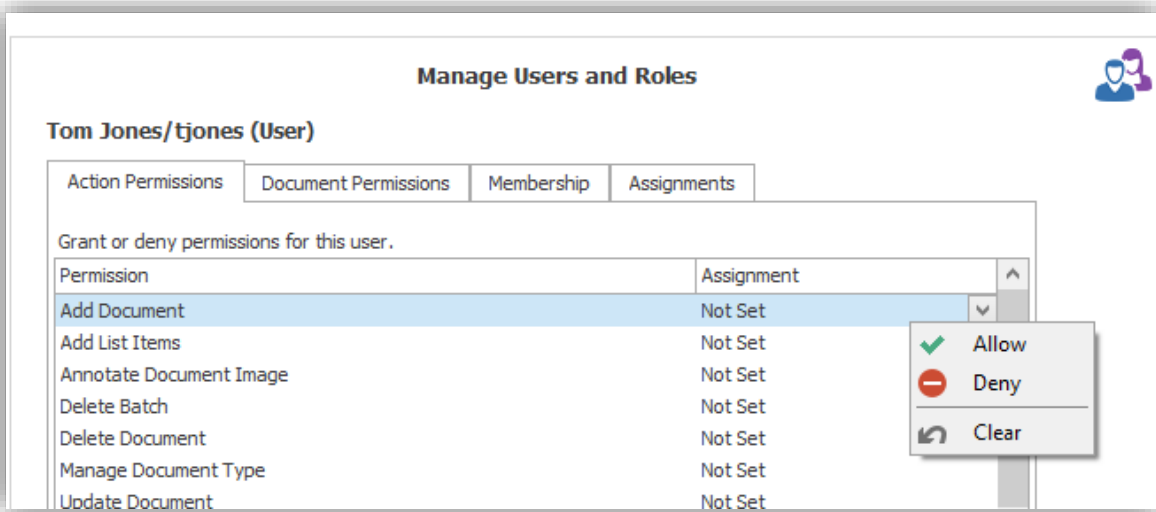
Note: Permissions can also be set at the role level. To add roles and assign users, see "Adding New Roles".

In the example below, "tjones" is granted the permission to "Add Document", "Add List Items", and "Annotate Document Image" but is denied permission to "Delete Batch" and "Delete Document". The permissions for "tjones" for "Manage Document Type" is "Not Set".
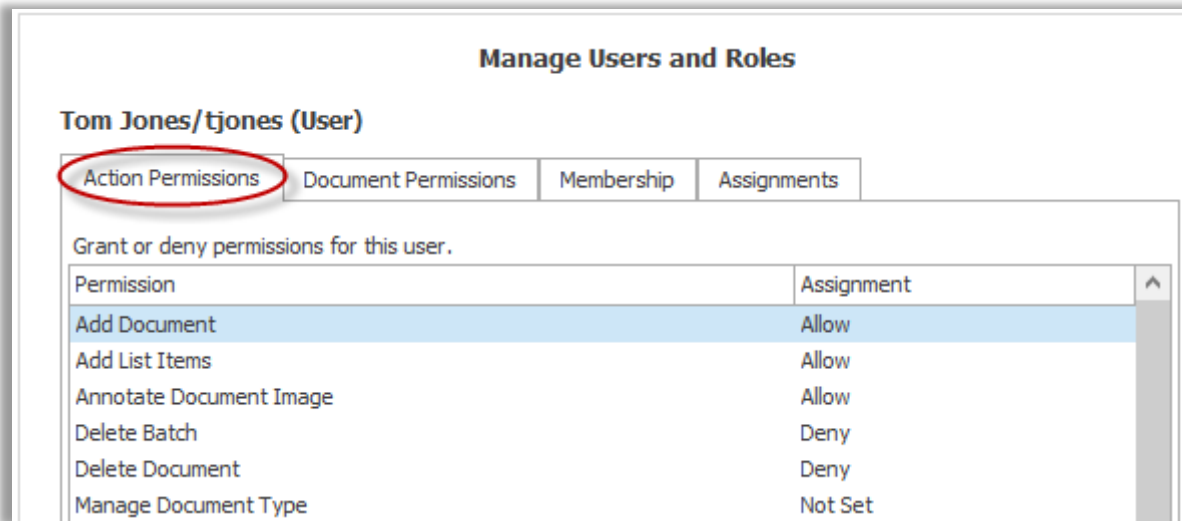
To assign "Action Permissions," see the permission grid for effective permissions below to effectively manage user and role permissions in the Cabinet.

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

To set the "Document Permissions" for "tjones," for example, click the "Document Permissions" tab. The user "tjones" will only have permissions to document types allowed to him or her. In the screenshot below, the "Document Permissions" are "Not Set". Right-click on the permission(s) to select the assignment or left-click it to activate the assignment drop-down.
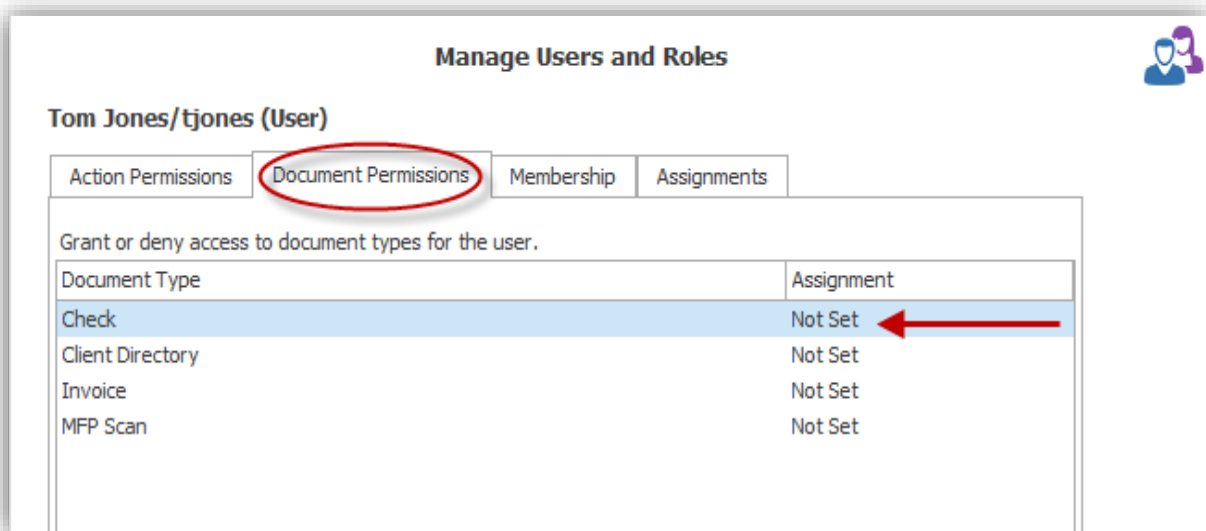
When assigning "Document Permissions," be sure to see below to effectively manage user and role permissions in the cabinet.

Note: "Allow by Default" below refers to an option in Manage Document Types. See the Creating a New Document Type topic for more information.

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

Allow	Allow	Not Set	Allow
Allow	Allow	Allow	Allow
Deny	Not Set	Not Set	Deny
Deny	Not Set	Allow	Deny
Deny	Allow	Not Set	Deny
Deny	Allow	Allow	Deny
Deny	Deny	Not Set	Deny
Deny	Deny	Allow	Deny

Membership

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


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

Adding New Roles

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

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

To add a new role, click **Manage Users and Roles** as shown in below. The window displays "Cabinet Users" at the top and "Roles" at the bottom. Locate "Roles" and click "Add".
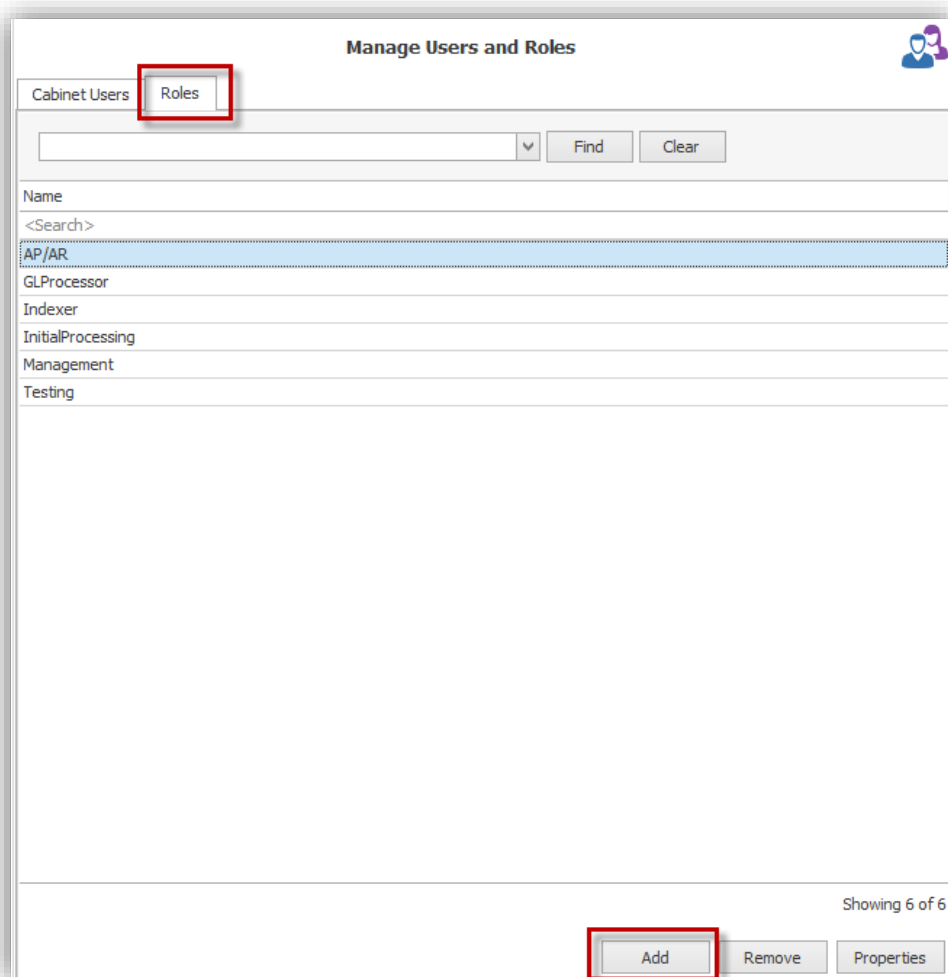
For example, to create a role for the Sales Department, enter "Sales" in the "Create a new role" screen as illustrated below and click "Next".
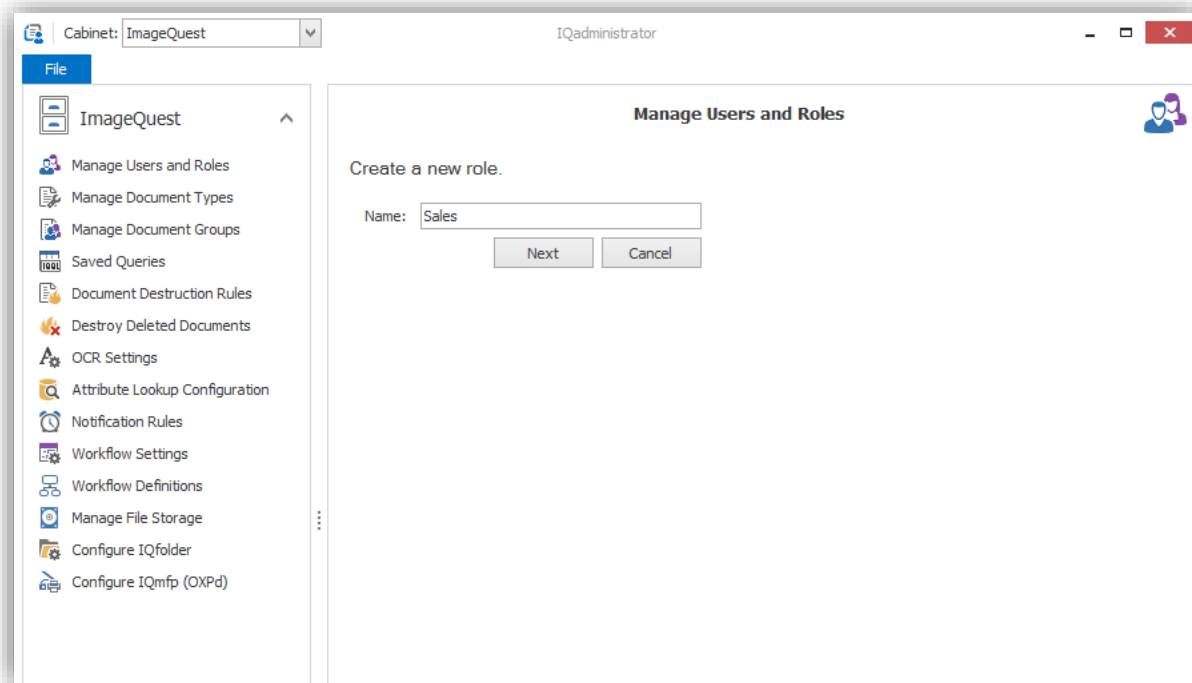
Set action and document type permissions for the "Sales" role as shown below; click "Done" when finished.
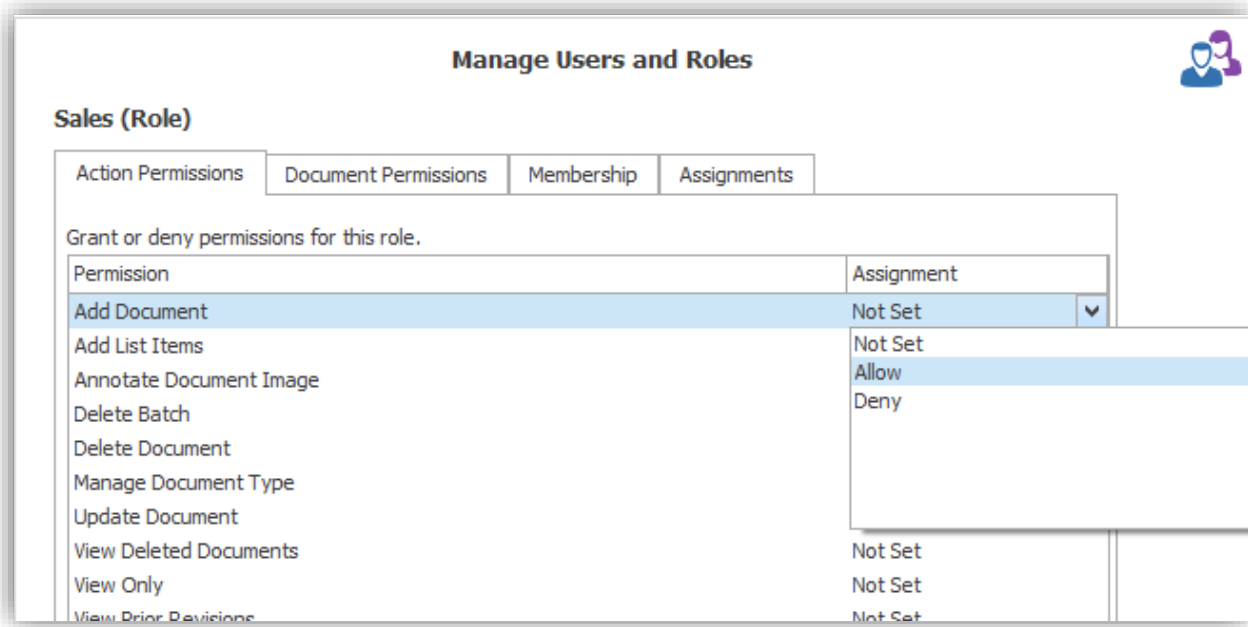
Click the "Membership" tab to assign or remove user membership for the indicated role as displayed below. Notice that "Administrator," "jsmith" and "tjones" are all assigned to the Sales role membership.

Membership in one or more roles can change the effective permissions for a user; for example, see the bottom portion of the "Action Permissions" and the "Document Permissions" tabs below representing the user's effective action and document type permissions for "tjones".

Assignments

User and Role properties have a tab called "Assignments" allowing the ImageQuest Administrator to see and reassign different assignment types to another user or role. This must be done before deleting a user or role with existing assignment types.

The following assignments can be changed from this tab:

- Routing
- Workflow Task
- Workflow Definition
- IQ folder
- Indexer
- MFP Device
- Notification
- Notification Rules

Searching Users or Roles

Users or roles can be searched for using the following grid features.

Auto-Filter Row

Type in the first row of any column to filter by rows whose column values matching what you type. In the example below, the Username column is filtered to only show values beginning with "t."

Username	First Name	Last Name	Allow SSO	Roles
<Search>	<Search>	<Search>	■	<Search>
Administrator			☐	InitialProcessing
dogden	David	Ogden	✔	
jsmith	John	Smith	✔	
student	Joe	Student	✔	Testing
test	Test	Tester	✔	InitialProcessing
tjones	Tom	Jones	✔	

Username	First Name	Last Name	Allow SSO	Roles
t	<Search>	<Search>	■	<Search>
test	Test	Tester	✔	InitialProcessing
tjones	Tom	Jones	✔	

Find Panel

Searching in the Find Panel will bring back any user/role with any column values matching the search criteria.

Cabinet Users	Roles			
Jo			Find	Clear
Username	First Name	Last Name	Allow SSO	Roles
<Search>	<Search>	<Search>	■	<Search>
jsmith	John	Smith	✔	
student	Joe	Student	✔	Testing
tjones	Tom	Jones	✔	

Column Filter

Each column has a filter which allows you to show only users/roles with column values matching the value selected in the filter. In the example below, users are being filtered by those which are in the "InitialProcessing" role.
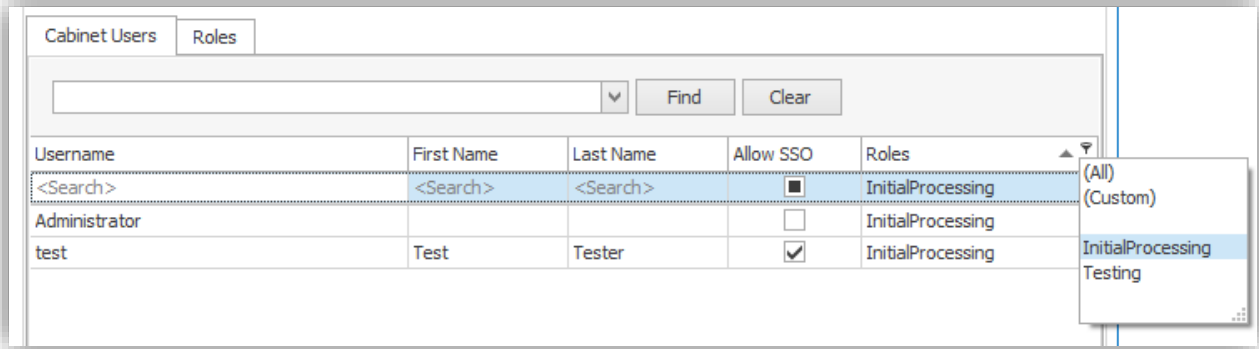
Sorting

Columns can also be sorted alphabetically.

Removing Users or Roles

Users and roles can be removed from the Cabinet in **Manage Users and Roles** by clicking the "Remove" button as illustrated below.
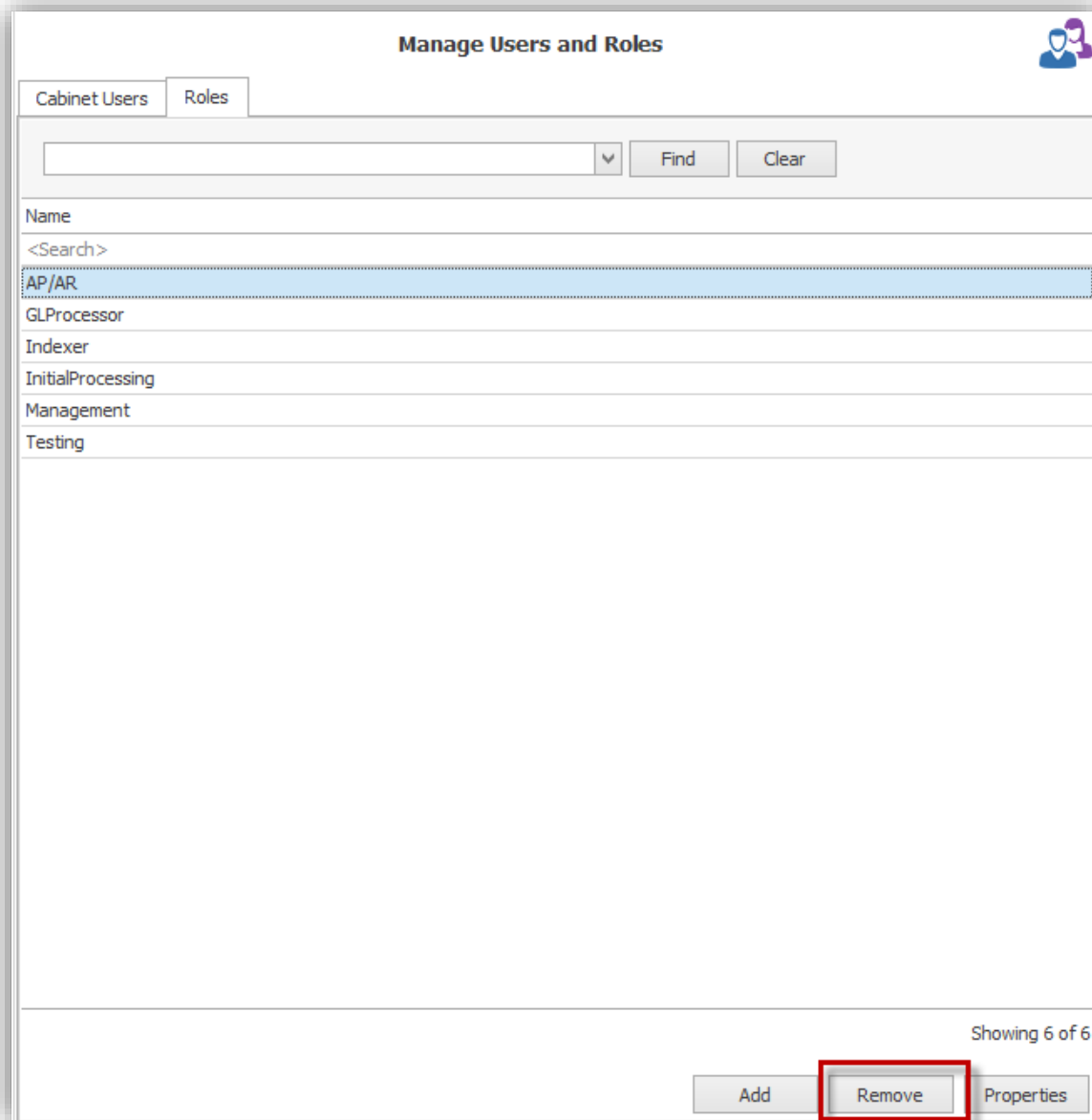
Note: If a user is removed from the cabinet, the user is NOT deleted from the Warehouse. If a role is removed from the cabinet, the user members who were assigned to that role are NOT removed from the cabinet.

Manage Document Types

Now that you have established users and roles and have set permissions and assignments, you are ready to manage document types in ImageQuest. Click **Manage Document Types** in the cabinet as displayed below. This window contains the "Document Types" and "Attributes" tabs; the window defaults to the "Document Types" tab each time it is opened.
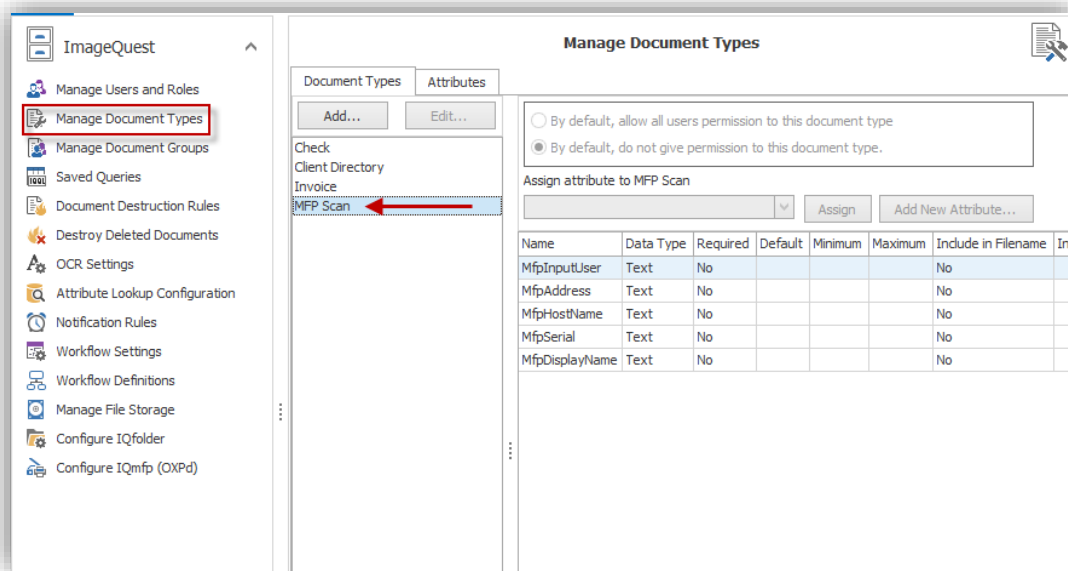
Note: The MFP Scan document type and attributes—MfpInputUser, MfpAddress, MfpDisplayName, MfpHostName and MfpSerial—are created by default and can neither be deleted nor edited.

Document Type Overview

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

Attribute Overview

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

In the example below, the **Manage Document Types** window displays the "Attributes" tab. The default MFP Scan attributes are listed—MfpAddress, MfpDisplayName, MfpHostName, MfpInputUser and MfpSerial; new attributes may be added and edited using the "Add New Attribute" and "Edit Attribute" buttons.
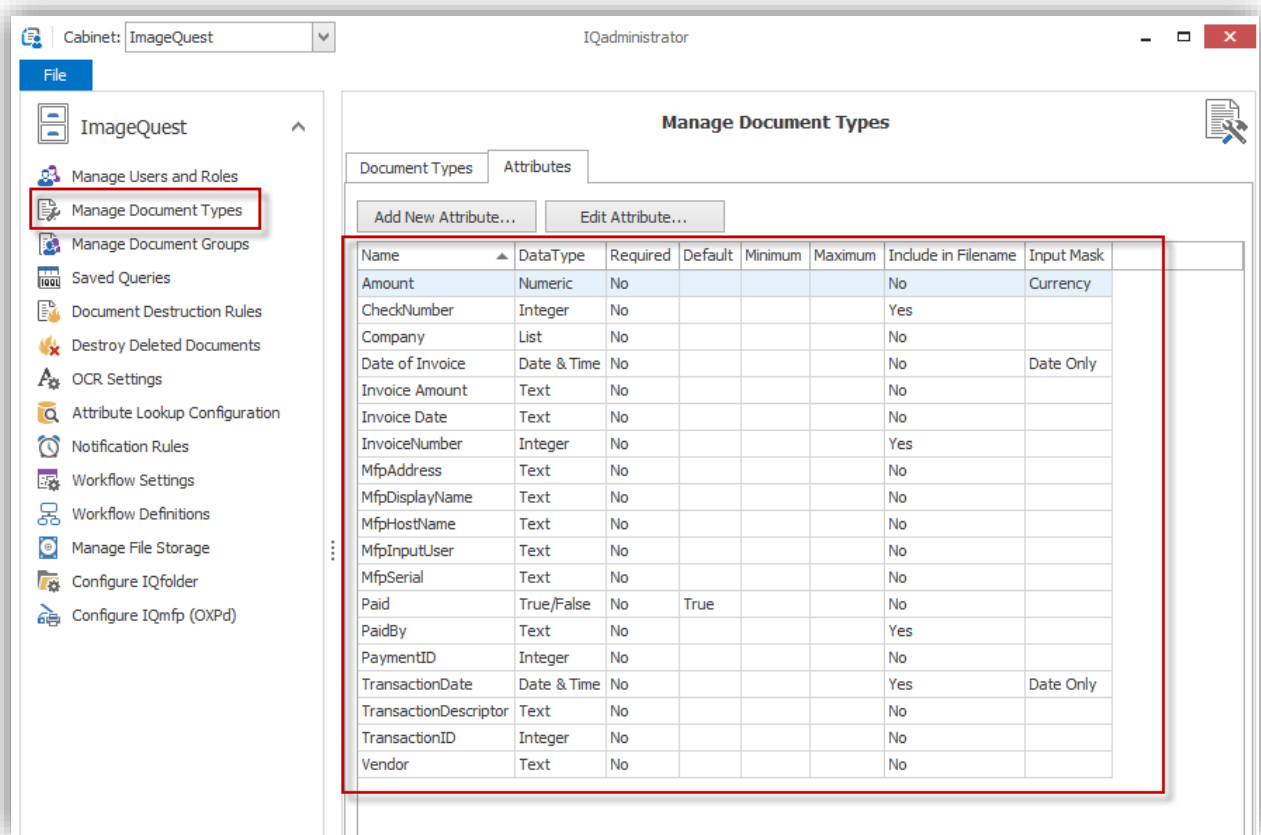
Note: Attributes may be created, edited and deleted from the "Attributes" tab.

Creating a New Document Type

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

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

Enter the name of the document as demonstrated below. Below the name field, the Administrator may either click the checkbox "By default, allow all users permission to this document type" only if it is desired for all users to have access to the Document Type or click "By Default, do not give permission to this type of document type." if the Administrator prefers to manage the permissions at the User or Role level.

"Allow these documents to be processed by FullText OCR" is checked by default, but can be unchecked if the specific document type should not be processed for Fulltext extraction or OCR conversion. Click "OK" to save the new Document Type.

The screenshot below shows that the new document type, "Purchase Order," has been created and is added to the "Document Types" tab in alphabetical order.

Creating and Assigning New Attributes

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

The screenshot below shows the "Add New Attribute" window and the options for attribute configuration. See the table below for a description of each section.

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

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

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

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

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

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

Input Masks

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

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

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

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

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

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

Add New Attribute

Attribute Name: Phone Number

Data Type

- (•) Text
- ( ) Numeric
- ( ) List
- ( ) Integer
- ( ) Date & Time
- ( ) True/False

Description

Text attributes can store a combination of letters, numbers and punctuation, such as descriptions, social security numbers, phone numbers, alpha-numeric account numbers, or any numbers that begin with leading zeros.
Examples:
003-RBC0908
123-456-7890
(407) 555-1212
007

Options

Minimum Length _____

Maximum Length _____

Default _____

Input Mask: US Phone Number ▼
US Phone Number
Social Security Number

Select a buil[ ] [ ]ol the display format and u[ ] [ ]te. See Admin Guide for further details.

[ ] Required   [ ] Include in filename

Test Area

Test some input for storage in this Data Type: _____   Test

OK   Cancel

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

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

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

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

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

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

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

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

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

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

Note: Input Masks are not supported in WebIQ.

Custom Input Masks (Text)

Metacharacters

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

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

Special Characters

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

Character	Meaning
>	If a > character appears in the mask, all the characters that follow it are in uppercase until the end of the mask or until a < character is encountered.
<	If a < character appears in the mask, all the characters that follow it are in lowercase until the end of the mask or until a > character is encountered.
<>	If these two characters appear together in a mask, no case checking is performed and the data is formatted with the case used by the end-user during data entry.

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/	A / character is used to separate the months, days, and years in dates. If the character that separates the months, days, and years is different in the regional settings of the system that the application runs on that character will be used instead.
:	A : character is used to separate the hours, minutes, and seconds in time values. If the character that separates the hours, minutes, and seconds is different in the regional settings of the system that the application runs on that character will be used instead.
$	A $ character is used to designate currency values. If the character that designates the currency values is different in the regional settings of the system that the application runs on that character is used instead.

Literal Characters

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

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

Examples

1. A mask for entering a telephone number: **(000)000-00-00**.
Each '0' metacharacter in this mask requires a numeric character in the corresponding position. No characters can be omitted. The '-', '(' and ')'characters in the mask are literals.

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

(__)__-__-__ (a value is not entered)

(555)222-33-22 (a value is entered)

2. A mask for entering a telephone number with an optional area code: **(999)000-00-00**
Here the **'9'** metacharacter allows end-users to omit the area code part of a phone number.

(__)222-33-22 (a valid phone number without a code part)

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

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

`A__-__` (a value is not entered)

`ASD-88` (a value is entered)

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

Custom Input Masks (Numeric/Integer)

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

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

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

| P | Percent (mode 1) | The mask for entering percents. The entered string is converted into a number "as is" (compare with the 'p' mask). So, if the "15 %" string is entered, the editor's value will be 15.

The precision specifier indicates the desired number of decimal places. If the precision specifier is omitted, the precision will be set to 2. | 25.00 %

(EditMask = "P";
EditValue = 25) |
| p | Percent (mode 2) | The mask for entering percents. The entered string is converted to a number and then divided by 100. The result is used as the editor's value (compare with the 'P' mask). So, if the "15 %" string is entered the editor's value will be 0.15.

The precision specifier indicates the desired number of decimal places. If the precision specifier is omitted, the precision will be set to 2. | 25.00 %

(EditMask = "p";
EditValue = 0.25) |

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

Character	Name	Description
0	Zero placeholder	A decimal digit (0-9) can be entered in the corresponding position. Empty placeholders are represented by '0' characters. When the input string is converted to the editor's value, digits left empty are interpreted as zeros.
#	Digit placeholder	A decimal digit (0-9) can be entered in the corresponding position or left empty. Empty placeholders are not displayed. When the input string is converted to the editor's value, digits left empty are not stored in the result.
.	Decimal point	The first '.' character in the format string determines the location of the decimal separator in the formatted value. The actual character used as the decimal separator is determined by the current culture (regional) settings.
,	Thousand separator	If the ',' character appears in the mask, thousand separators will be inserted between each group of digits to the left of the decimal point as defined by the culture (regional) settings.

%	Percentage placeholder	If the '%' character appears in the mask, the value entered is divided by 100 when converted to the editor's value. So, if the '15 %' string is entered, the stored value will be '0.15'. The percent character used is dependent upon the current culture. An appropriate symbol is inserted in the edit box at the location where the '%' symbol appears in the mask.
%%	Percentage placeholder	If the '%%' string appears in the mask, the entered value is not divided by 100 when it's converted to the editor's value. So, if the '15 %' string is entered, the edit value will be '15'. The percent character used is dependent upon the current culture. An appropriate symbol is inserted in the edit box at the location where the '%' symbol appears in the mask.
\	Escape character	The character following the escape character is inserted into the edit box literally. To display a backslash in the edit box the mask should contain the '\\' string.
;	Section separator	The ';' character is used to separate the masks for positive and negative values. The mask can contain two parts delimited by the ';' character. The first part defines the mask for entering positive values; the second part specifies a mask for entering negative values. An end-user can toggle the value's sign by pressing the '-' key. In this case, depending upon the value's sign, the value entered is automatically re-formatted using the appropriate mask. If the ";" character is followed by an empty string, the editor will not allow end-users to enter negative values.
$	Currency character	Defines the position of the currency symbol determined by the current culture.
Any other character	Literal character	Any other characters that appear in the mask are inserted into the edit box literally. To display special characters in the edit box literally, they should be preceded with the escape character ('\').

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

End-User Capabilities

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

- Pressing the '-' key changes the sign of the value being edited. The caret can be placed at any position within the edit box.

- Pressing the Up-Arrow and Down-Arrow keys increments or decrements the digit to the left of the caret's position. If the entire text is selected, pressing these keys increments or decrements the digit to the left of the decimal point.

- Scrolling the mouse wheel increments or decrements the digit to the left of the caret's position. If the entire text is selected, scrolling the mouse wheel increments or decrements the digit to the left of the decimal point.

Examples

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

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

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

3,080.60 (Stored Value = 3080.6)

-3,080.60 (Stored Value = -3080.6)

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

<<3,080.60>> (Stored Value = -3080.6)

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

List Attribute

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

Once this data type is selected, the "Options" section changes as illustrated below. List-based attributes allow you to select an item from a list of choices you define such as the example displayed. To modify items in the list, click the "Modify List" button.

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

In the Modify List window, add an item by entering its name near the top. Items may also be edited or removed from the grid below. By default each list item is enabled. Deselecting this checkbox will remove that item from the list shown during indexing but will leave it available for searching previously indexed documents.

Category\Subcategory List Attribute Type

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

In the example below, Category shows the entry to the left of the '\' and the Subcategory shows what is to the right of the '\'. If this option is checked and entries are populated in the list options, users will be able to choose from a list of categories and subcategories like states\cities (i.e. Florida\Orlando).
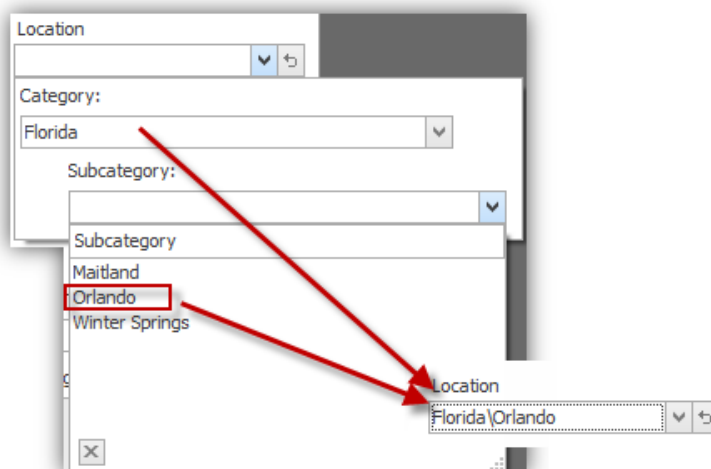
Sharing Existing Attributes

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

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

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

Editing, Removing and Reordering Attributes

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

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

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

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

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

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

Attributes can be unassigned or removed from Document Types. For example, attribute "Patient Health Insurance Provider" is no longer needed for Document Type "Health History". Select the Document Type, right-click the attribute and select "Remove" from the menu. See below.
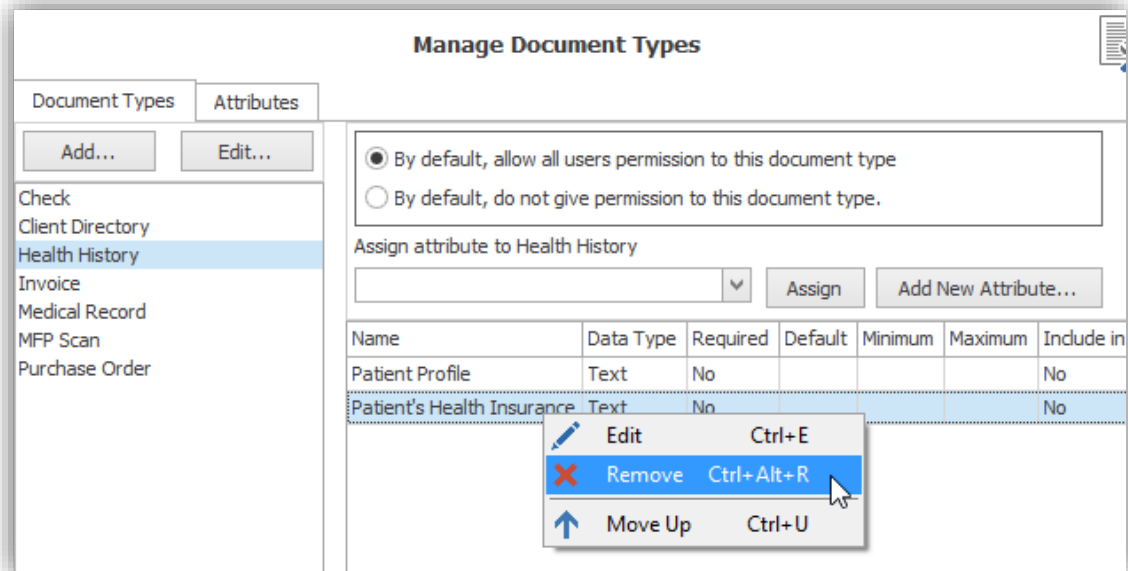
The dialogue box, "Confirmation," below appears to ensure the Administrator wants to remove the selected attribute. If so, click "Yes". The Document Type, "Health History," will now have only one attribute: "Patient Profile", for indexing.
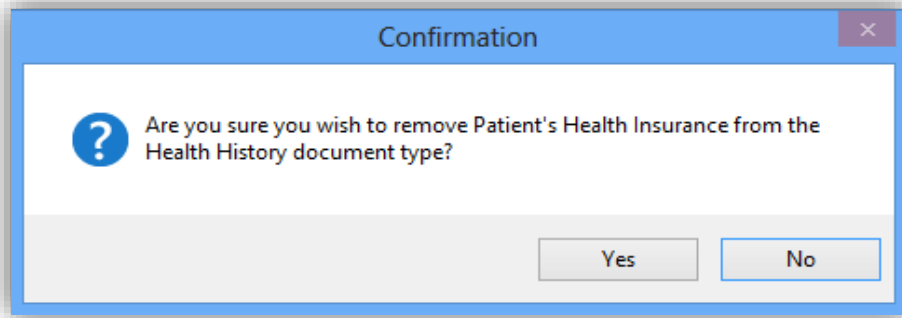
Attributes can also be reordered for indexing purposes on the document type level. By default, the attributes are displayed in the order in which they were assigned to the document type. It may make more sense to have the attributes in a specific order, for example Street, City, State, and Zip. If there is a need to reorder attributes, right-click an attribute and select "Move Up" or "Move Down" from the menu. See below for an example.
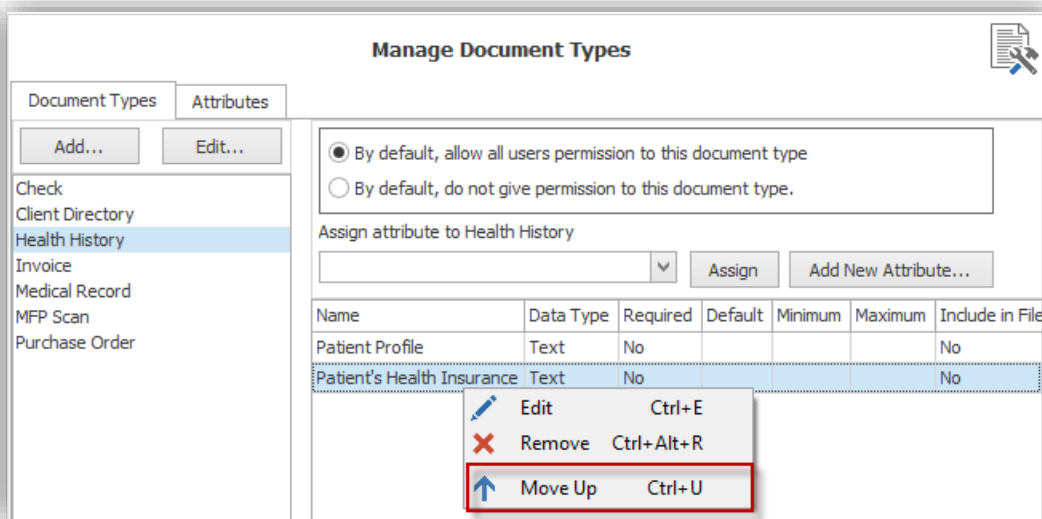
Editing and Removing Document Types

To edit a Document Type, right-click the Document Type and select "Edit" in the menu as shown below. The "Modify Document Type" window will appear with the Document Type name highlighted. For example, the Document Type "Health History" is being modified here. Type in the new title, "Patient Health Record", and optionally decide whether to allow all users to access this Document Type by default or to be processed by FullText OCR and click "OK".
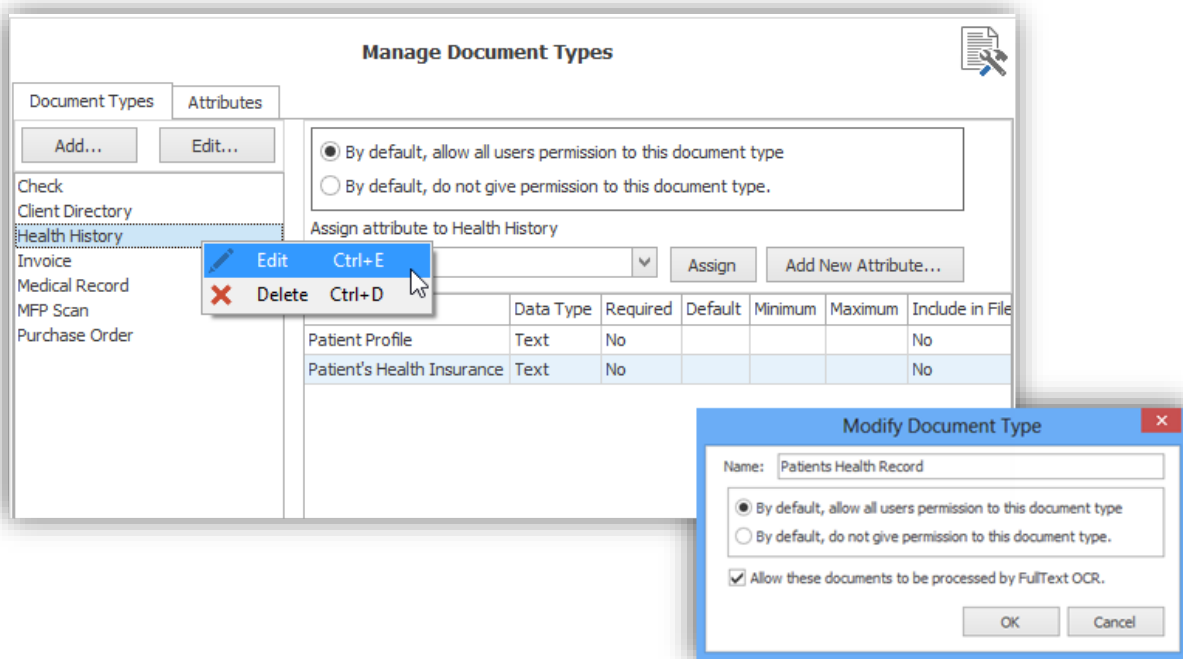
Once you click "OK", you will see that "Health History" has been renamed to "Patient Health Record" as highlighted below.
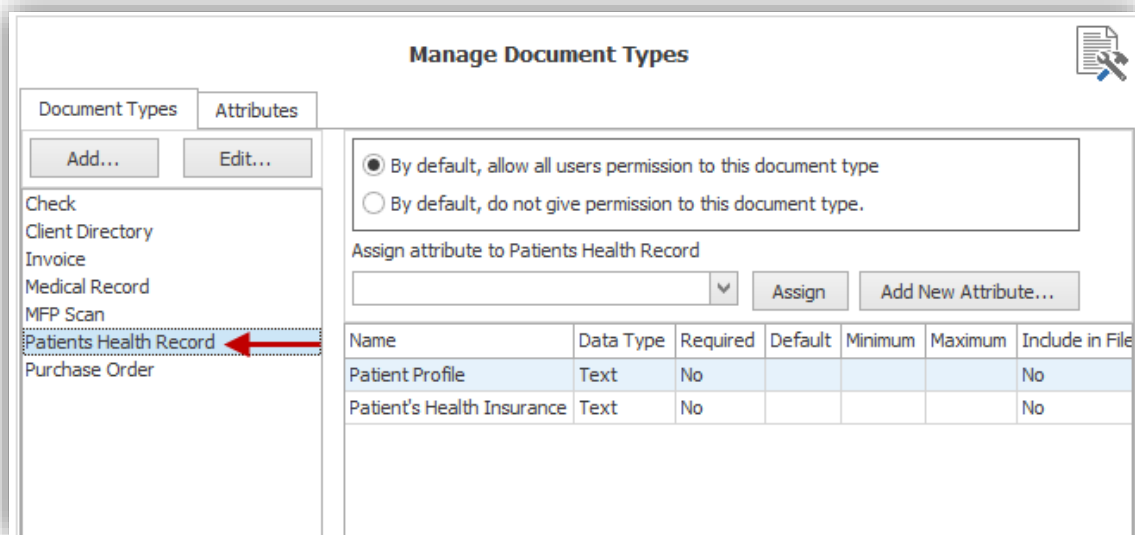
To delete a Document Type, locate it in the "Document Types" tab, right-click on it and select "Delete" in the menu as shown below. The Document Type, "Invoice", is being deleted.
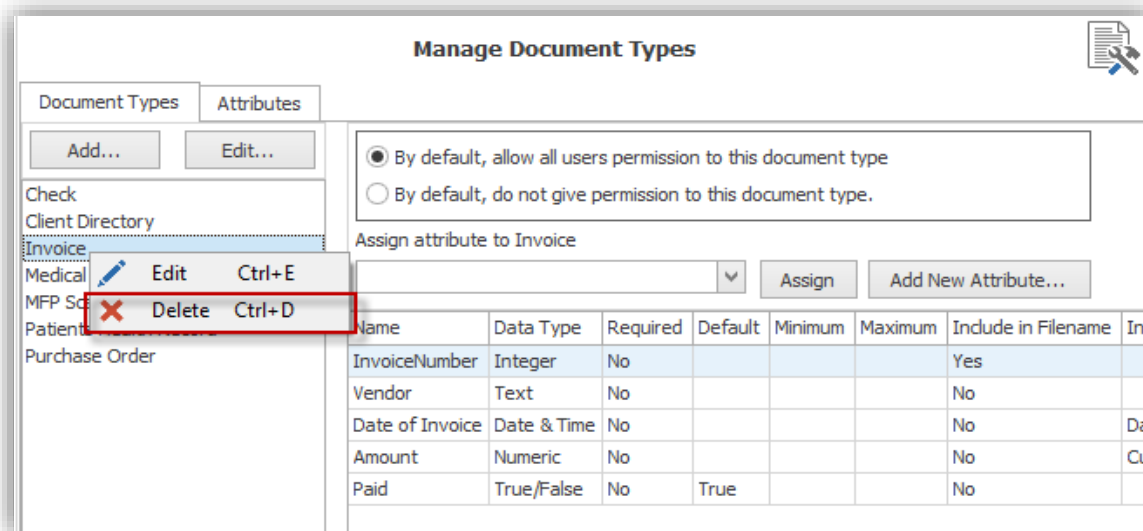
The dialogue box, "Confirmation" appears to ensure that the Administrator desires to delete the selected Document Type, "Invoice" as noted below. Click "Yes".
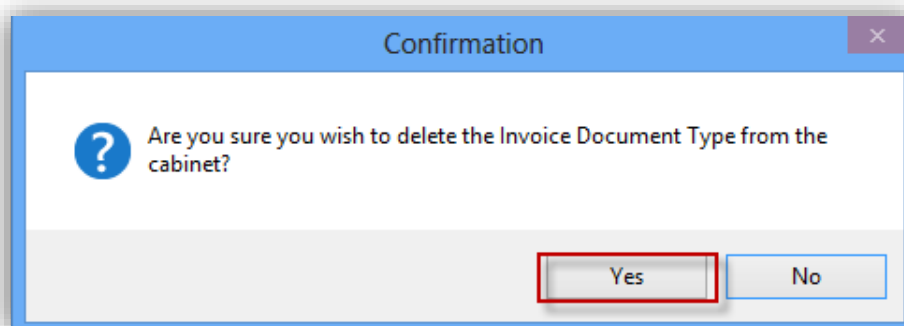
Note: If a Document Type or Attribute is in use by one or more existing documents, they cannot be deleted. This also includes documents that have been flagged as deleted.

Manage Document Groups

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

Click **Manage Document Groups** as displayed below to Add, Edit or Delete Document Groups.
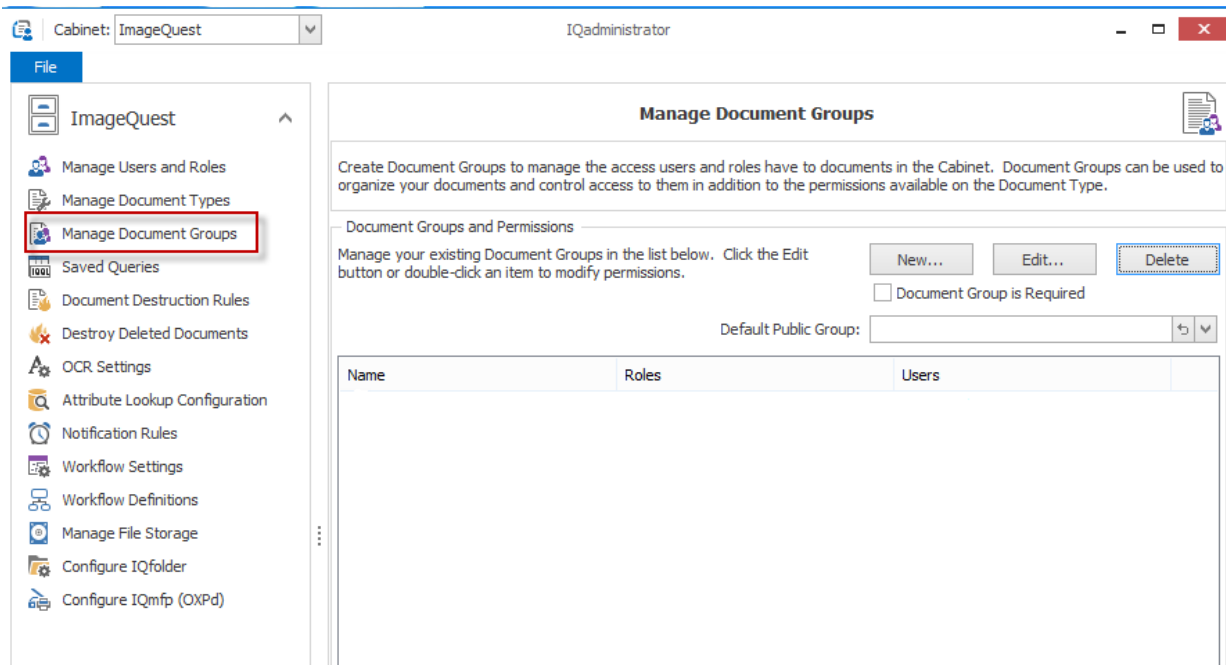
To create a new Document Group, click "New" to open the "Add Document Group" window as shown below. The window contains the "Document Group Name" field and two lists, one for all current ImageQuest "Roles" and one for all current ImageQuest "Users".
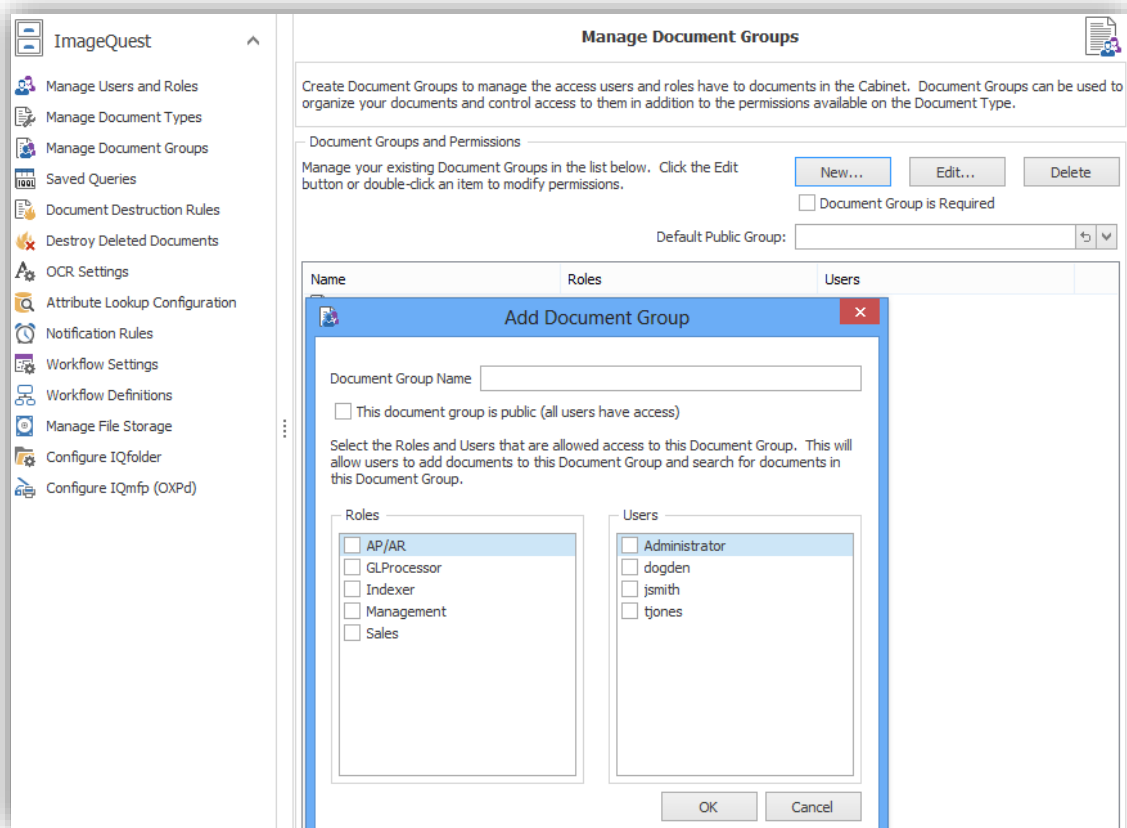
For example, a company receives invoices from three cities: Atlanta, Orlando and Phoenix. Each of these cities has a Sales Manager assigned to it. Only the Sales Manager and the company's CFO are allowed access to the Invoice documents in the Cabinet for each location. The Administrator can create a Document Group for each location and add the assigned Sales Manager and the CFO to the group to accommodate this need.

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

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

The Document Groups and Permissions list will show each group that has been added and displays the group "Name" and the names of the "Roles" and "Users" that are members of the group as seen below. "ORL" is listed under "Name" and "Bjones", "dogden", and "tjones" are listed under "Users". These are the only Users that are able to assign Invoices to the "ORL" group or search for documents assigned to the "ORL" group.
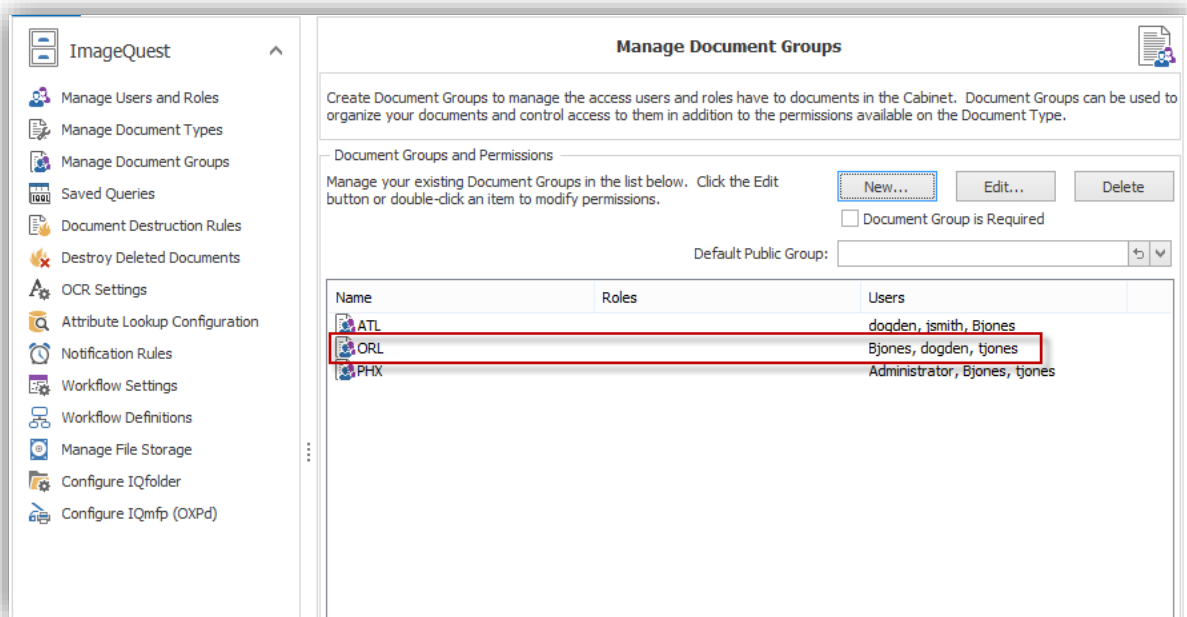
To edit a Document Group, double-click the group "Name" or select the group and click "Edit" to open the "Edit Document Group" window. See below. In this window, you can change the "Document Group Name" or add or remove Roles or Users in the group.
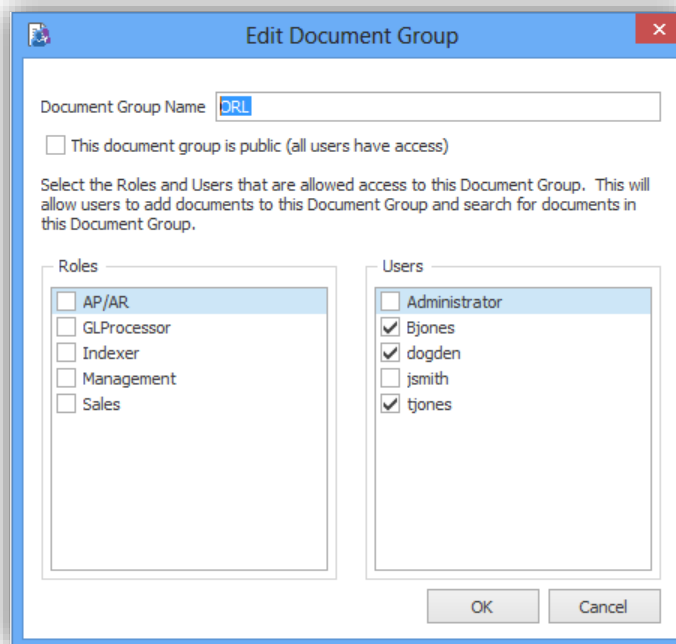
The "AP/AR" Role is added to the group.

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

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

To delete a Document Group, highlight the row in the Document Groups and Permissions list and click "Delete". A "Delete Confirmation" dialogue box will ask to confirm the deletion. Click "Yes" to delete the Document Group or "No" to retain the Document Group.
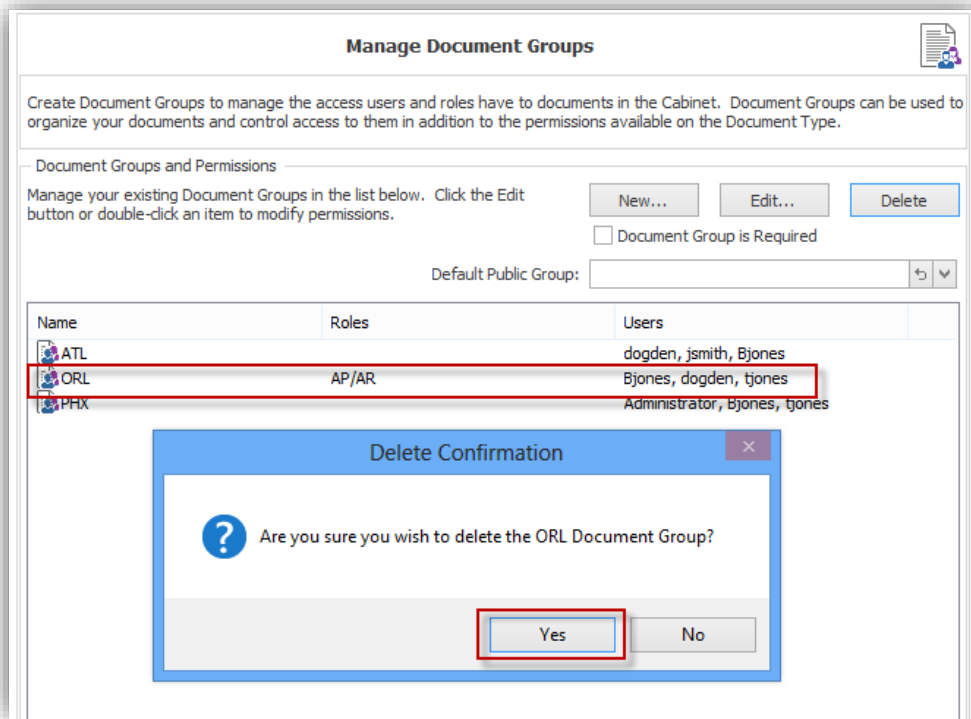
A Document Group cannot be deleted if one or more documents are assigned to the group. If the Administrator attempts to delete a group that has documents assigned, an error dialogue box is displayed and it includes the number of documents currently assigned to the group. These documents must be edited to change or remove the group assignment before the Document Group can be deleted.

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

Document groups can be configured as public groups which gives everyone access to the documents in that group (assuming the user has document type permissions). There is also an option to require a document group be selected when indexing a document.
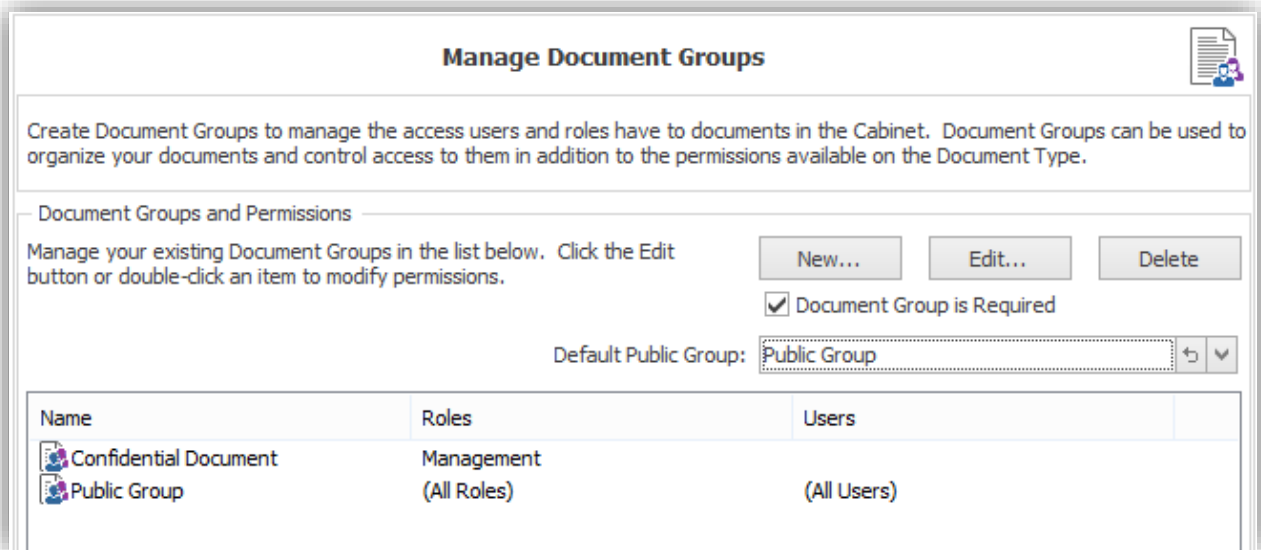
Please see the *ImageQuest User's Guide* for more information on how to add and search for documents assigned to Document Groups.

Saved Queries

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

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

Symbol	Definition
Query	Criteria | "(" Query ")" ("AND" | "OR") "(" Criteria ")"

Criteria	Attribute Operator Value | Attribute "IN" "(" ValueSet ")"
Attribute	"[" *attribute name* "]"
Operator	"=" | "<" | ">" | "<=" | ">=" | "!="
Value	"NULL" | NonNullValue | ParameterPrompt
ValueSet	NonNullValue | ValueSet "," NonNullValue
NonNullValue	"'" *literal value* "'"
ParameterPrompt	"'{" *attribute name* ":" prompt text "}'"
literal value	The actual value of the Attribute, for example an actual invoice number.
attribute name	The actual name of the Attribute as defined in *IQadministrator*
prompt text	The text that appears on the client search screen, for example, *Enter an invoice number.*
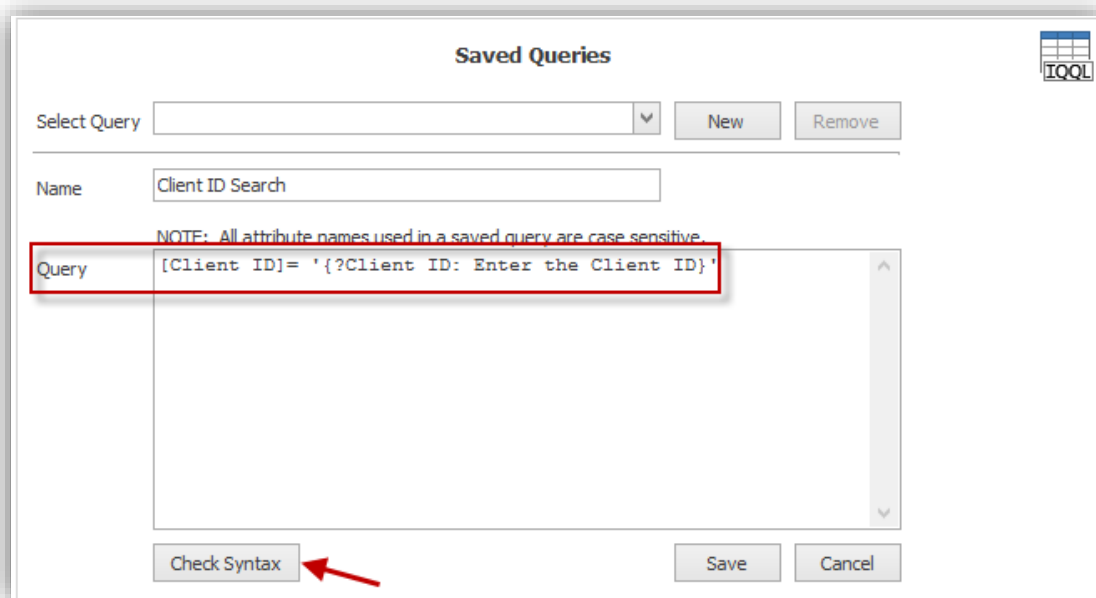
In practice, the PIQQL query is simply a string of comparisons of the form [Attribute] = 'Value', which can be optionally connected by the boolean AND and OR operators. Parenthesis are optional, but can be used around any part of an PIQQL query that would itself be a valid standalone query, in order to enforce proper grouping of the boolean operations. Literal values that are numeric constants do not

require the enclosing quotation marks, but they are always valid. (For non-text Attributes, you must ensure that the literal value can be converted to the proper type, or the query parser will generate an exception.) The one exception to this rule occurs with sets of numeric values within a ValueSet; the PIQQL parser currently rejects a ValueSet for an IN statement if the Values are not contained within quotations.

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

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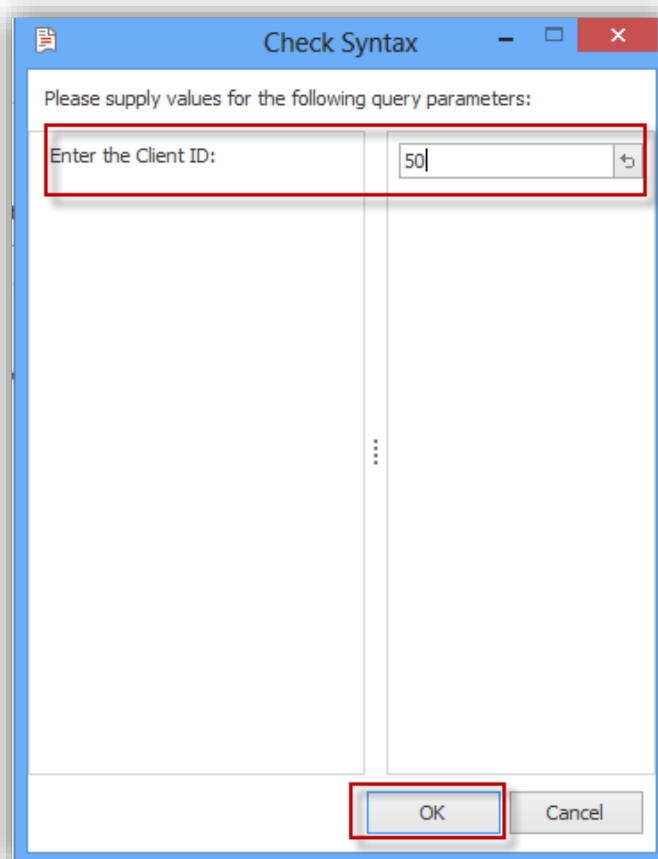
Enter a test string as shown below and then click "OK".

The dialogue box, "Check Syntax," will inform the Administrator that the query validated successfully as noted below.
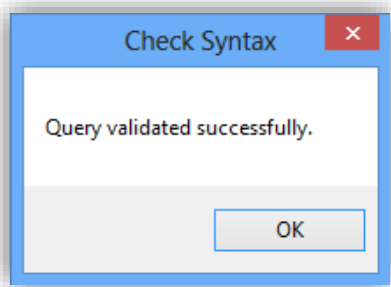
The Administrator is redirected back to the **Saved Queries** screen as shown below. Click "Save".
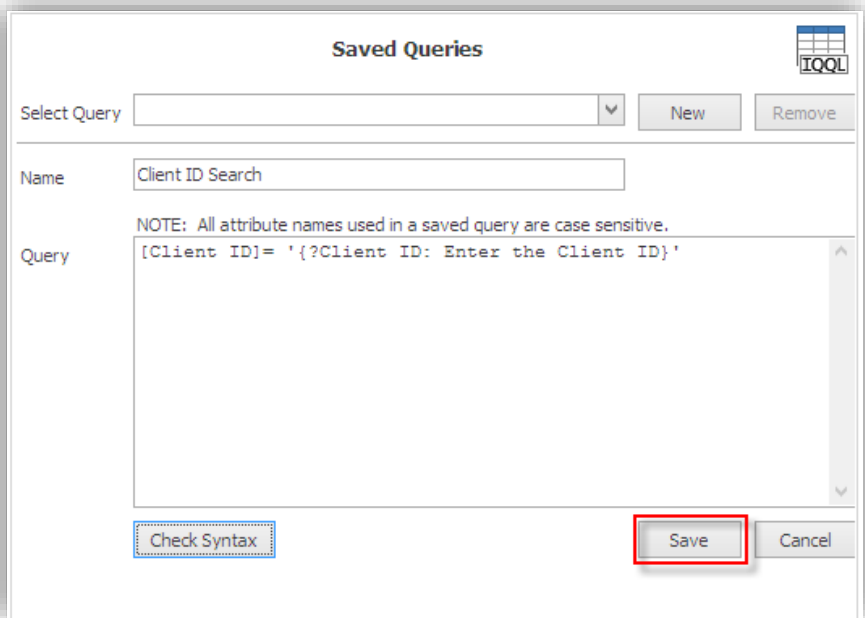
See below for other syntax examples for creating new queries.

Query Syntax Example	Result
[*Employee Number*] = '{?*Employee Number*: *Enter an Employee Number*}'	Prompts the user to enter an employee number and searches across all Document Types for that value

[DocumentType] IN ('W-4', 'Form I-9') AND ([Employee Number] = '{?Employee Number: Enter an Employee Number}')	Prompts the user to enter an employee number and searches only the W-4 and Form I-9 document types for that value

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

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

Document Destruction Rules

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

Click "New Rule" to open the Add Document Destruction Rule dialog.

Type a meaningful name in the "Name" field and select which Document Type(s) apply to the rule. In the "Destroy documents that are older than" section, change the numeric value and select "Days" or "Years" from the drop-down and then select an ImageQuest Date & Time attribute from the drop-down list in the "Determine document age using attribute" section.

For example, the administrator wants to create a new rule to destroy all ImageQuest Employee Records where Date of Invoice is older than 7 days and Active = "False".

The administrator enters "Invoice Date" for the Name and selects Document Type "Invoice". The "Destroy documents that are older than:" value is changed to "7", "Days" is selected from the drop-down and "Date of Invoice" is selected from the "Determine document age using attribute" section.

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

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

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

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

In this example, the administrator will run the "Invoice Date" rule.

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

For this example, the administrator clicks "Yes".
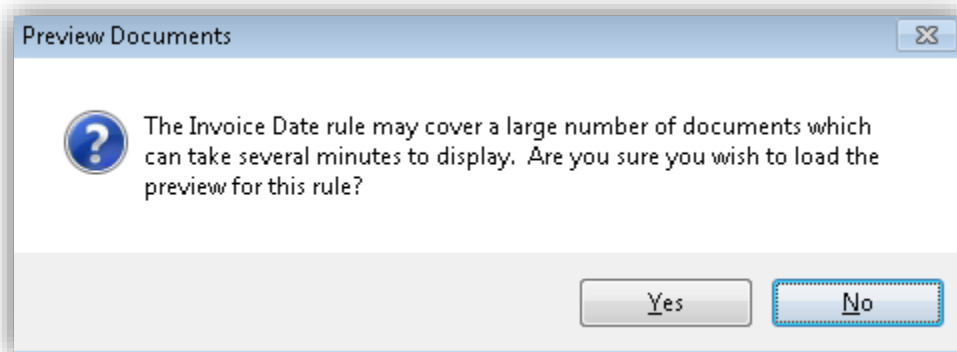
The "Preview Documents" window loads and includes the rule name in the title bar. The example below displays 36 documents. At this point, the administrator has a few different options:

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

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

The "Refresh" button refreshes the current display. The "Print" button allows the administrator to print the grid if needed. Clicking "x" will close the Preview Documents window. None of these actions will destroy any documents.
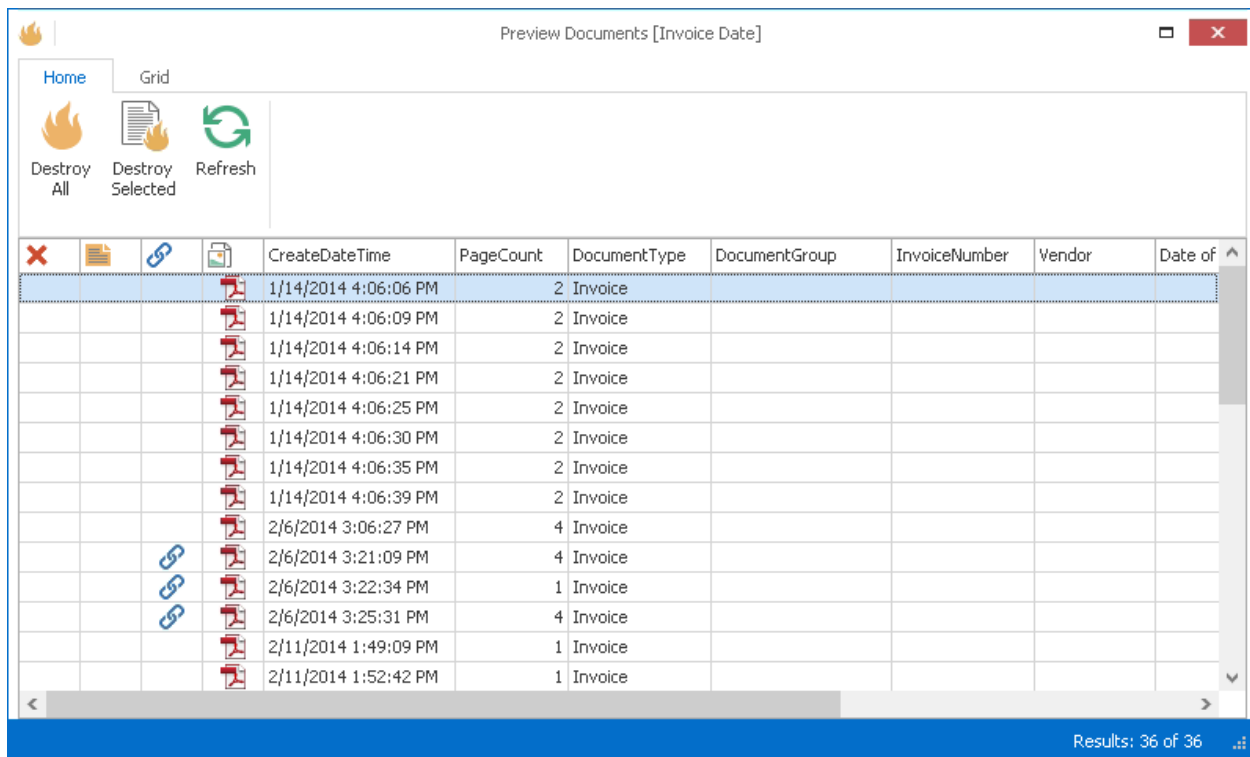
For this example, the administrator will select "Destroy All".

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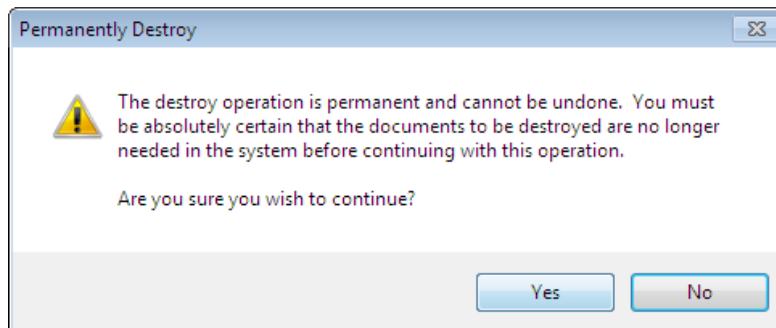
Click "Yes" to continue and perform the operation.

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

For this example, the administrator selects "Yes".

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

The "Destroy All" selection destroyed all 36 documents in the grid, so the Preview Window has 0 documents to display. If the administrator had selected 12 of the 36 documents and chose "Destroy Selected", the Preview Window would display the remaining 24 documents once the operation was complete.

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

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

Destroy Deleted Documents

ImageQuest has the following feature: Destroy Deleted Documents, which allow documents and related data to be permanently "destroyed". When document destruction is performed on a group of documents, the documents and document data are physically and permanently destroyed. Destroyed documents can longer be accessed in ImageQuest and also cannot be restored.

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

Destroy Deleted Documents

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

Choose an option

(●) Destroy deleted documents that were created 120   Days ∨   ago.

(○) Destroy all deleted documents in the system.   🔍 Preview...

Rule execution history   🖶

RunDateTime ▼	Rule	Username	Results

History entry details

RunDateTime:

Rule:

Username:

Details:
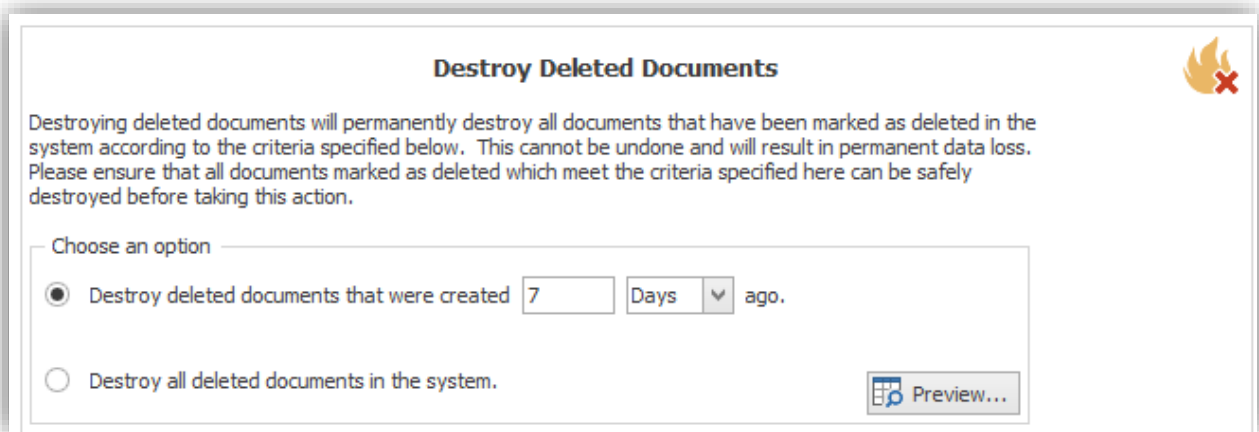
Results:

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

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

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

The administrator can then click "Preview" to open the "Preview Documents" window to see all the documents flagged as deleted that meet the criteria. The example below displays 4 documents. At this point, the administrator has a few different options:

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

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

The "Refresh" button refreshes the current display.

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

Clicking "x" will close the Preview Documents window and will not destroy any documents.
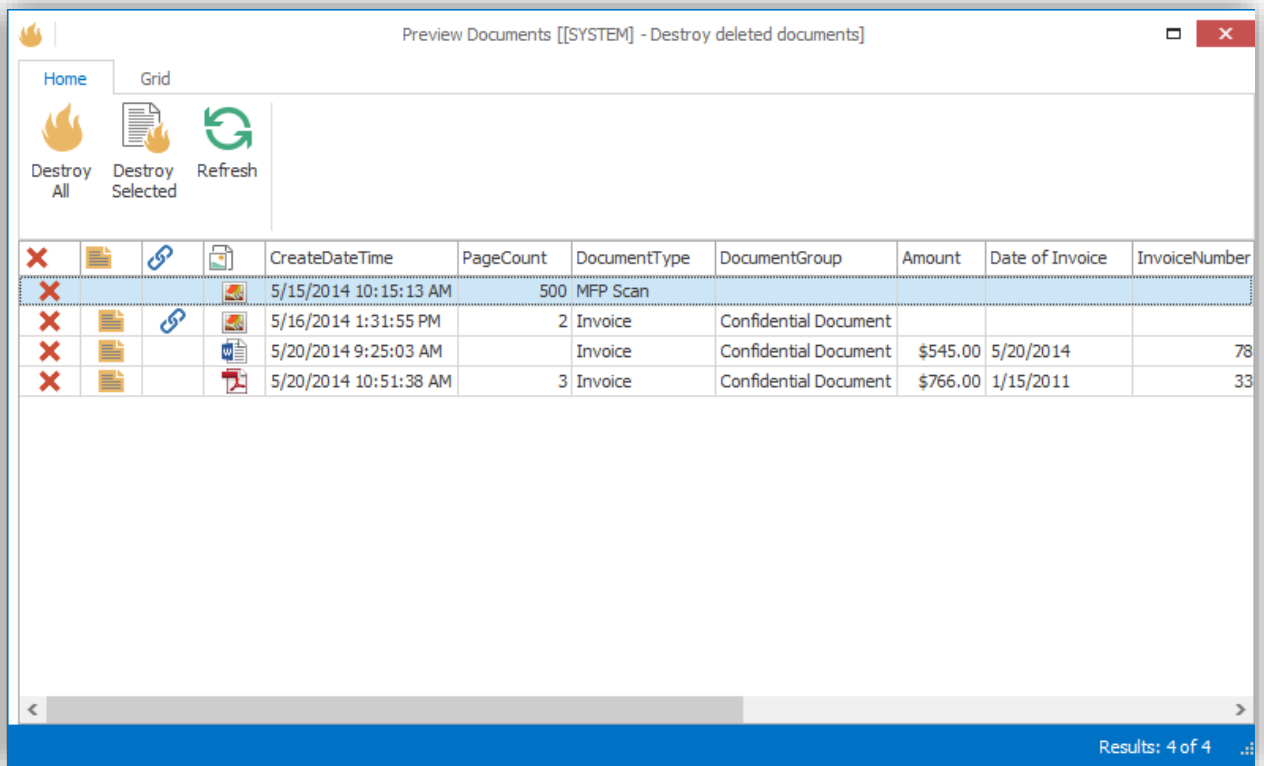
For this example, the administrator will select "Destroy All".

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

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

For this example, the administrator selects "Yes" to perform the document destruction.
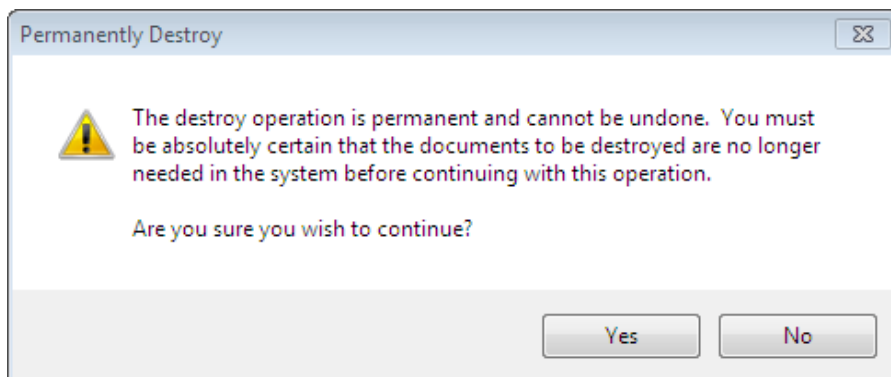
When the operation is complete, the Preview Window will display the results.

The "Destroy All" selection destroyed all 4 documents in the grid, so the Preview Window has 0 documents to display. If the administrator had selected 2 of the 4 documents and chose "Destroy Selected", the Preview Window would display the remaining 2 documents once the operation was complete.
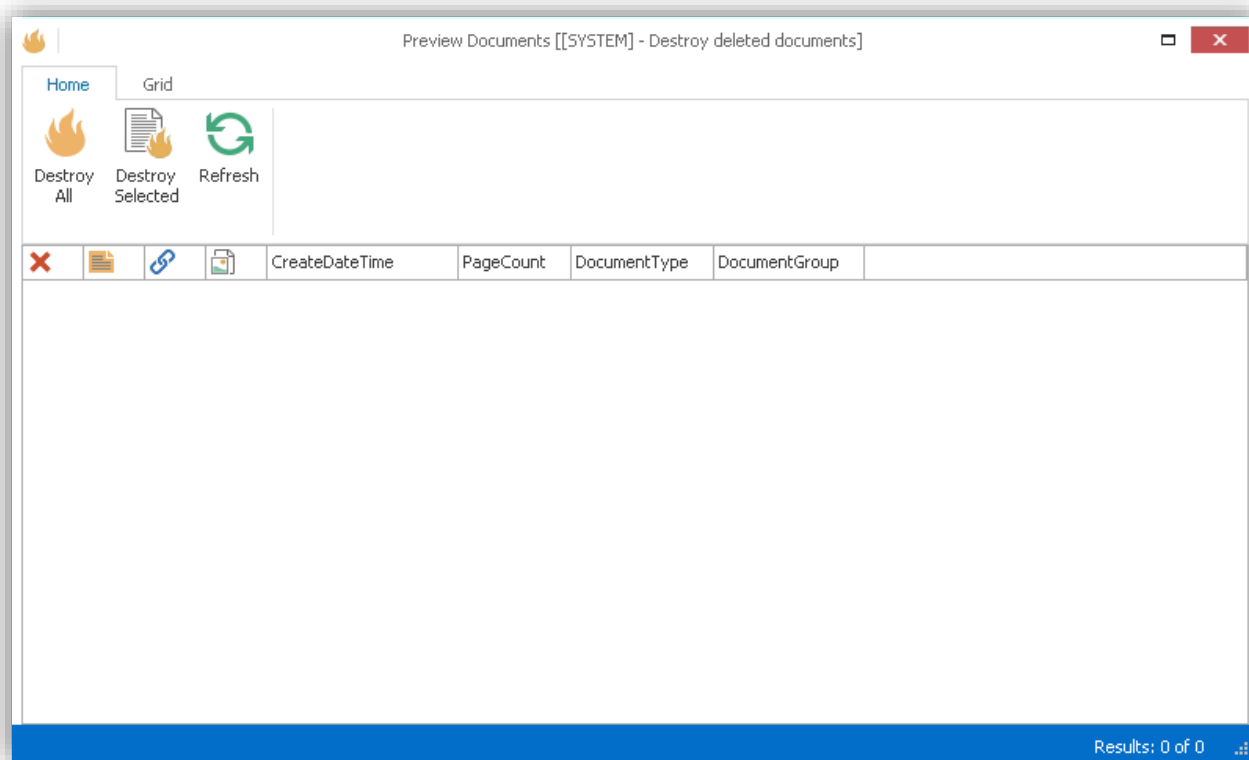
The "Rule execution history" section contains the history of each Destroy Deleted Documents operation performed and includes the RunDateTime, Rule, Username and Results columns. The IQQL query used for the operation is also displayed.   The administrator can select an entry in the grid to view the details for the History entry.

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

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

OCR Settings

OCR Settings allows the administrator to enable or disable OCR features and manage the IQ OCR Full Text Service.
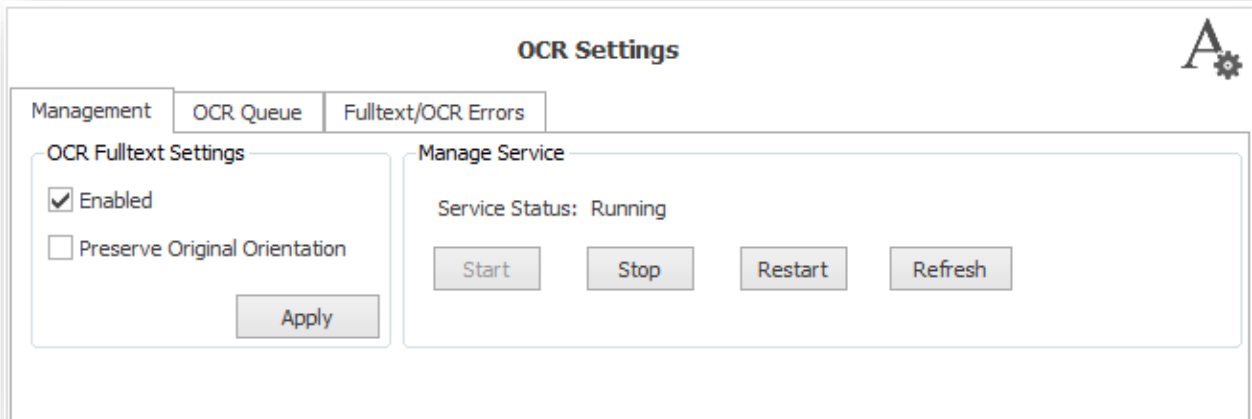
To enable or disable Fulltext, check or uncheck the box and click "Apply".

The Fulltext feature gives you the option to keep your original document orientation by using the Preserve Original Orientation option. If this is not checked, the OCR service may re-orient pages so that their texts are right-side-up.

If you make changes and click Apply, The message below will appear notifying the administrator that the changes will not take effect until the current OCR cycle is complete.
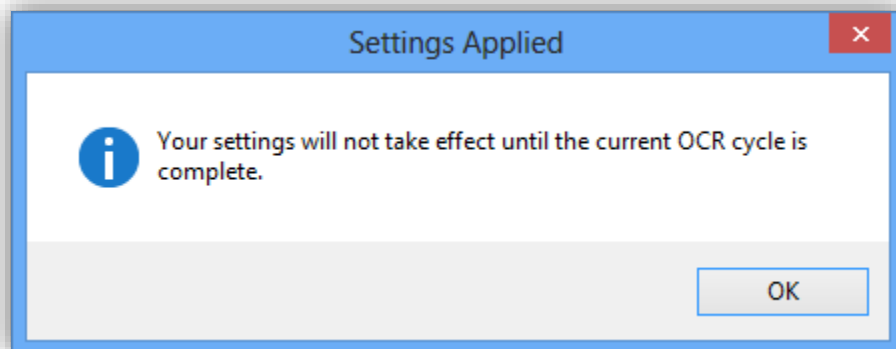
The Manage Service feature allows the ImageQuest Administrator to confirm the status of the IQ OCR and Full Text Service and Stop, Start and Restart the service as needed. Client machines can also manage the service remotely provided their Windows user account has permissions to start and stop services on the ImageQuest server.

The OCR service benefits from multi-core, hyper-threaded and multi-CPU systems (up to 4 cores) resulting in much faster processing times.

There are two other tabs under the OCR settings menu (resulting in 3 total tabs under the OCR Settings menu) : OCR Queue and Fulltext/OCR Errors. The OCR Queue shows the list of documents across all ImageQuest cabinets that are waiting to Full-Text extracted and the document currently being processed highlighted in yellow.

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

OCR Settings

| Management | OCR Queue | Fulltext/OCR Errors |

Drag a column header here to group by that column

Ordinal ▲	OCR Type	Cabinet	DocumentType	FileType	PageCount	Size (MB)	CreateDateTime	Document Id
0	FullText	ImageQuest	Clinical Evaluation	PDF	1	4.61	10/23/2015 1:56 PM	030f929b-c4d0-4e44-b1af-db
1	FullText	ImageQuest	Clinical Evaluation	PDF	1	4.61	10/23/2015 1:56 PM	6c950891-ddcc-4d80-8887-13
2	FullText	ImageQuest	Clinical Evaluation	PDF	1	4.61	10/23/2015 1:56 PM	3cd95a4b-6ccb-42fe-af8f-a31
3	FullText	ImageQuest	Clinical Evaluation	PDF	1	4.61	10/23/2015 1:55 PM	92bcac67-792d-466c-a088-06
4	FullText	ImageQuest	Clinical Evaluation	PDF	1	4.61	10/23/2015 1:55 PM	1cb00326-0dc7-4f1f-a116-03
5	FullText	ImageQuest	Clinical Evaluation	PDF	1	4.61	10/23/2015 1:55 PM	4750b1f7-e13f-4d0f-9f76-33b
6	FullText	ImageQuest	Clinical Evaluation	PDF	1	4.61	10/23/2015 1:55 PM	32ab25e2-5f1c-41f3-92a9-4c
7	FullText	ImageQuest	Clinical Evaluation	PDF	1	4.61	10/23/2015 1:55 PM	a20ee7f9-1766-4850-a0d4-b

Total Count: 8

Refresh

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

Attribute Lookup Configuration

Attribute Lookup Configuration allows the ImageQuest administrator to configure and manage Attribute Lookup settings from IQadministrator. This leverages an external data-source for retrieval of information but it cannot be used to update the originating data-source.

Note: Any lookups that were previously configured before upgrading to version 11.3 will need to be reconfigured manually.

To create a new lookup, first select an ImageQuest Attribute to be used as the Keyfield.   FirstName is selected in the example below. Click OK to continue and to configure the lookup.
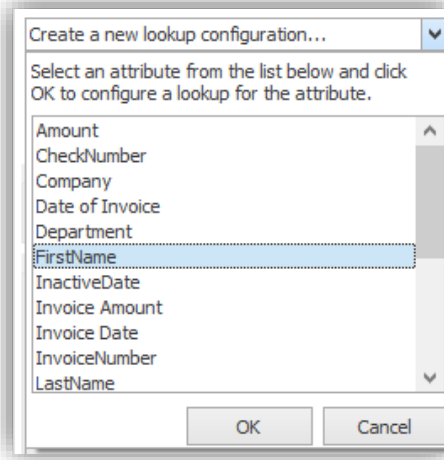
Next, select an ODBC Connection String for the data source from the drop-down. The list provides some commonly used ODBC string templates that may be used. If you do not see an ODBC Connection string for your type of database, one can manually be typed in.
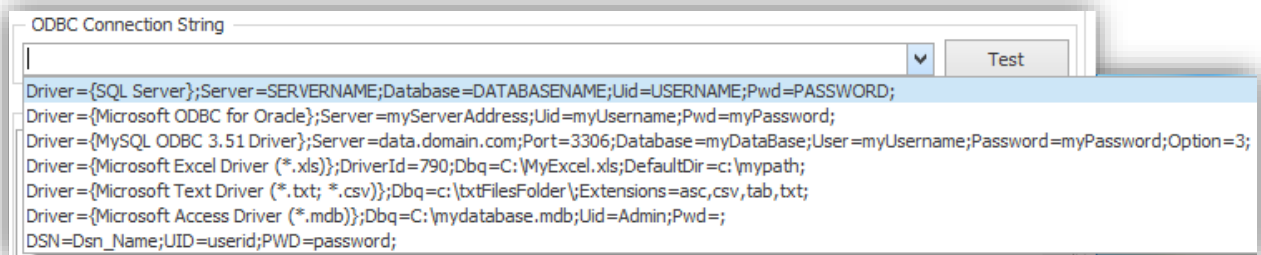
Configure the ODBC Connection String by providing the required parameters for the chosen connection string. Click "Test" to test the connection and confirm it is valid and then click OK to continue.
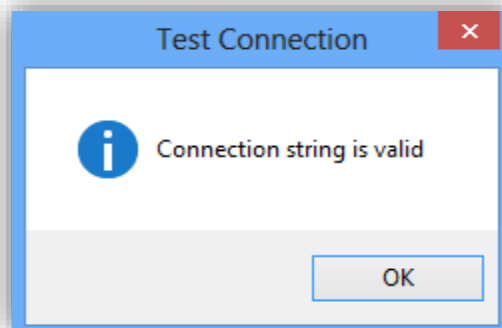
Enter the SQL query to be used by the Attribute Lookup to retrieve records from the data source. Click the "Insert Token" button to add the keyfield to the select statement in the proper syntax. In the example below, "[%FirstName%]" is added. The apostrophes are needed because the keyfield is a text value and the extra percent to the right is needed because of the LIKE operator.
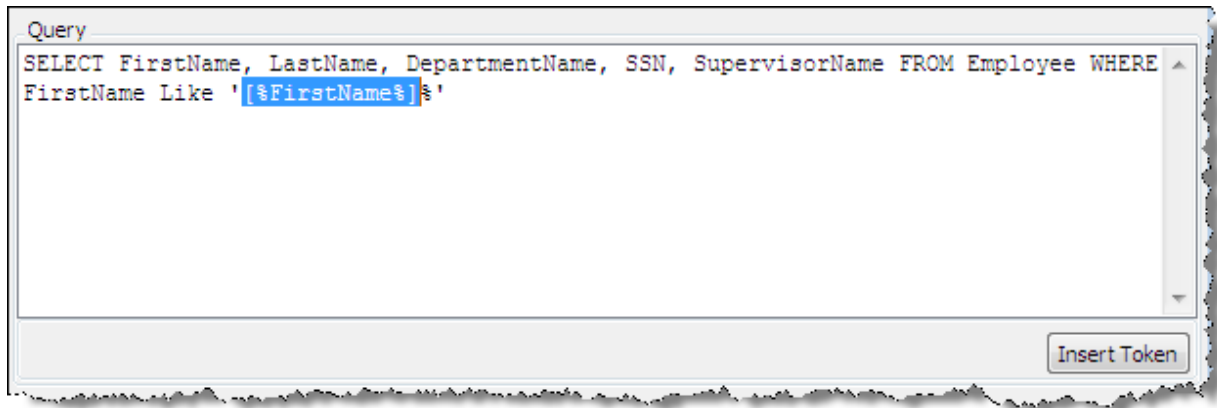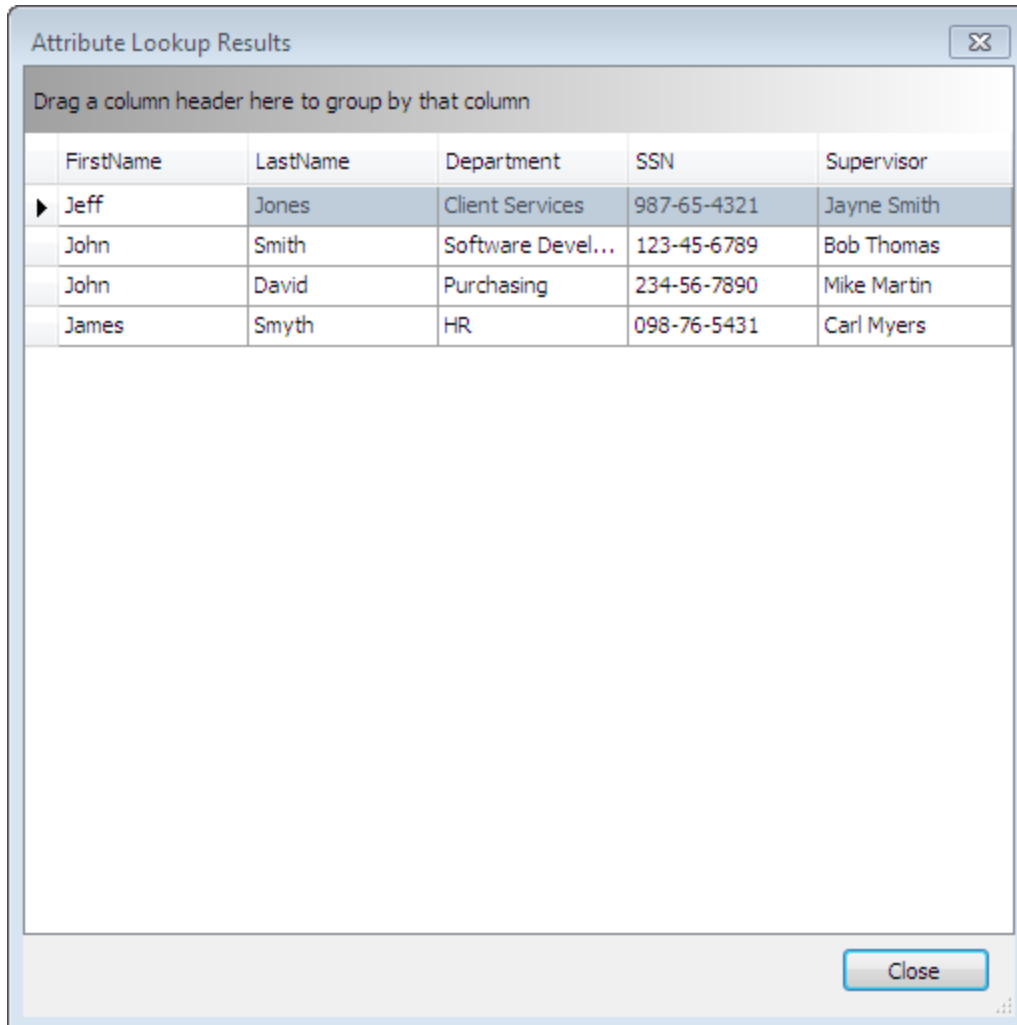
The Optional Field Mappings section allows the ImageQuest administrator to map a data source column (Source Field Name) to an ImageQuest attribute (Attribute) if the names are not the same.
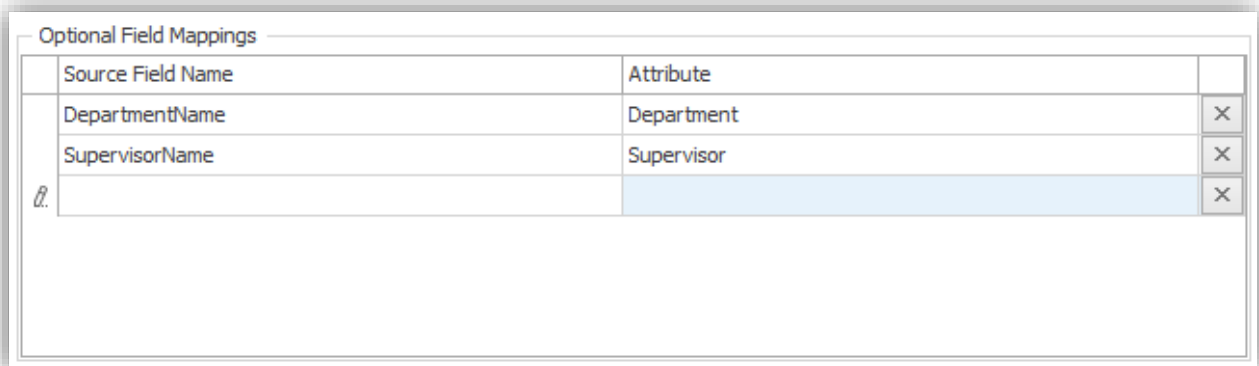
The Test Input section provides the option to test the Attribute Lookup configuration. In the example below, "j" is entered to lookup any FirstName that begins with the letter j. Click "Test" to perform the lookup.
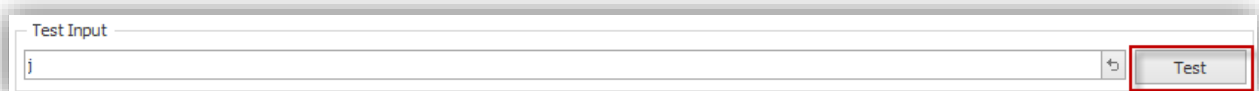
The Attribute Lookup will perform the query on the source and provide a preview of the results. In this example, the lookup by letter "j" returns four unique records. Click Close to close the results window and click "Save" to save the Attribute Lookup Configuration.

Attribute Lookup Results

Drag a column header here to group by that column

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

Close

Notification Rules

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

Notification Rules

➕ New Rule   ✏ Edit Rule   ❌ Delete Rule

Name	Date Attribute	Days Notice	Days Recurring	Message
Contract Expiration	TransactionDate	120	15	This contract will expire in 120 days
Invoice Payment Due	Date of Invoice	10	2	Invoice payment is due in 10 days or less

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

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

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

Workflow Settings*

Accounts Payable Workflow is an add-in to ImageQuest. Accounts Payable Workflow is designed to help you capture invoice data necessary for approvals and voucher entry into your ERP or accounting system. Data typically captured includes vendor, invoice date, invoice number, purchase order number and invoice total. The invoice may then be routed for approval to any number of users using ImageQuest's built-in ad-hoc workflow. General ledger codes, which are linked directly from your ERP or accounting system for validation, may be added at any step in the process. Once approved, a voucher will be created which may be posted to your ERP or accounting system for payment. Integration is possible with any system which will accept an XML or CSV file for voucher import. If desired, a record of the entire transaction may be recorded in ImageQuest at completion of the workflow.

With accountability and tracking in mind, the system uses its already proven auditing capabilities to insure timely delivery, approval, and denials of company documentation using both the ImageQuest Work Queue and email notification features of each step in the workflow process. (See Work Queue and Document History for more information.)

Workflow Definitions*

Building on the ad-hoc variety of workflow described above, Workflow Definitions allows administrators to create automated workflow processes based on your current manual processes. Based on information such as vendor or invoice amount, the system will automatically move the invoice through each step of the process. This approach virtually eliminates any human decisions as to where the invoice goes next, providing a consistent and robust solution to your accounts payables approvals process.

Workflow Definitions are highly customizable and may be used to automate processes around any documents types. Workflow Definitions can be configured to
- Set attribute values dynamically based on values of other attributes
- Generate approval tasks and route them to users or roles based on conditional logic
- Create parallel tasks
- Send notifications based on conditional logic
- Rotate pages
- Assign general ledger coding tasks
- And more!

For documentation, refer to the ImageQuest Custom Workflow Guide.

*Please contact the Informa Software's Sales or Client Services team for additional information.

Manage File Storage

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

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

For the Status to show as "Online" the Storage location must be accessible from the ImageQuest server and the Service Account must have read\write access to the folder.
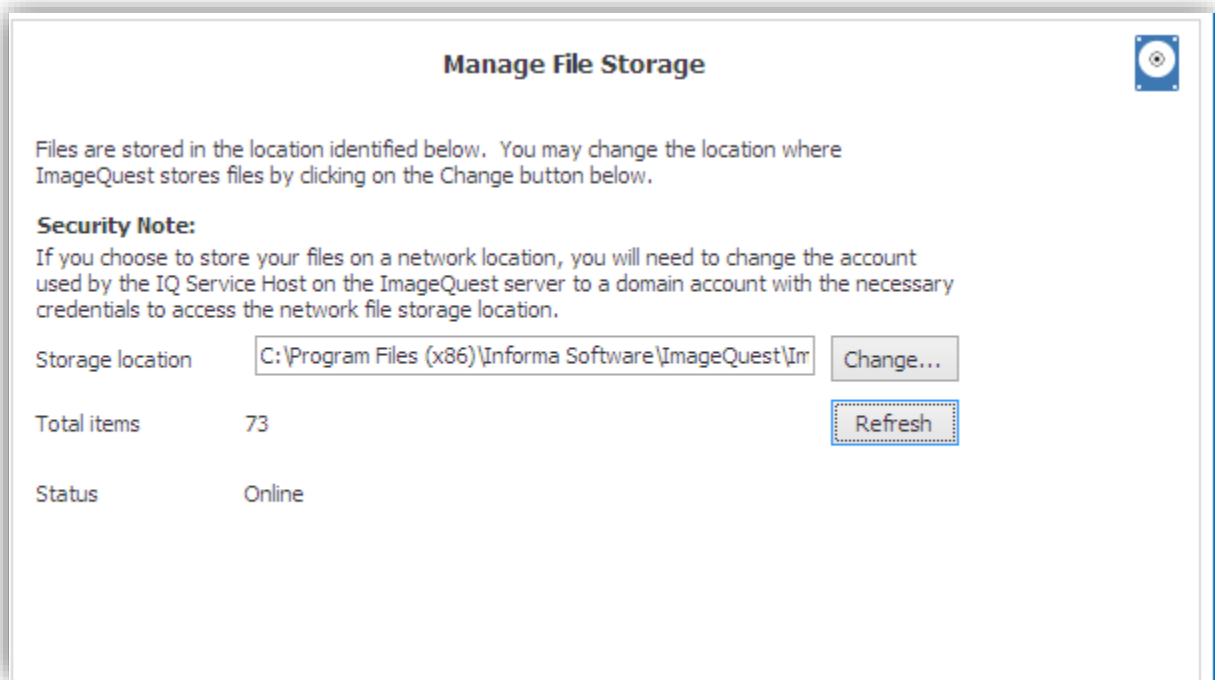
The "Storage location" field shows the current location where the files are stored. The "Total items" value shows the total number of files in the "Images" folder; the "Refresh" button allows the Administrator to update the "Total items" count.

To change the "Storage location", click the "Change" button as illustrated below.
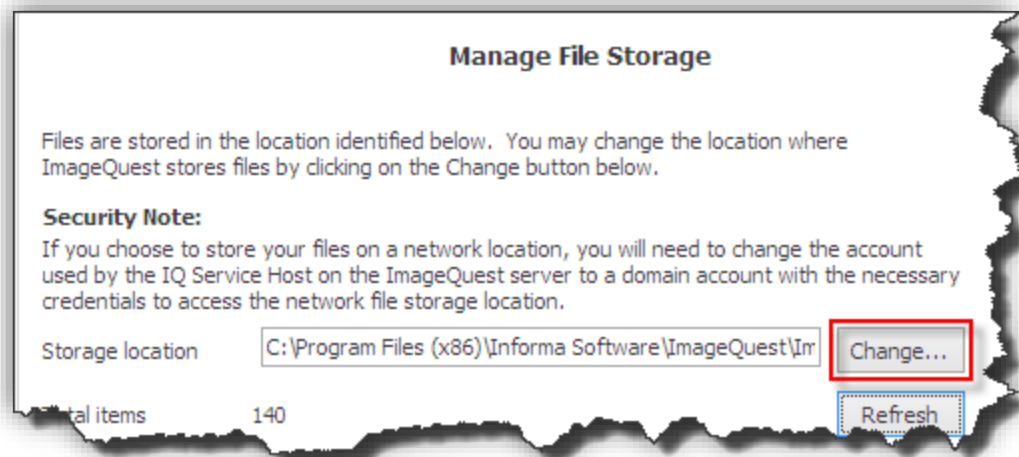
Note: The storage location is exclusive to ImageQuest, with its own folder structure, and should not be modified in any way.

The "ImageQuest Storage Provider Update Wizard" guides the Administrator through the process of changing the file storage location. Read the highlighted notes carefully and click "Next" to proceed.
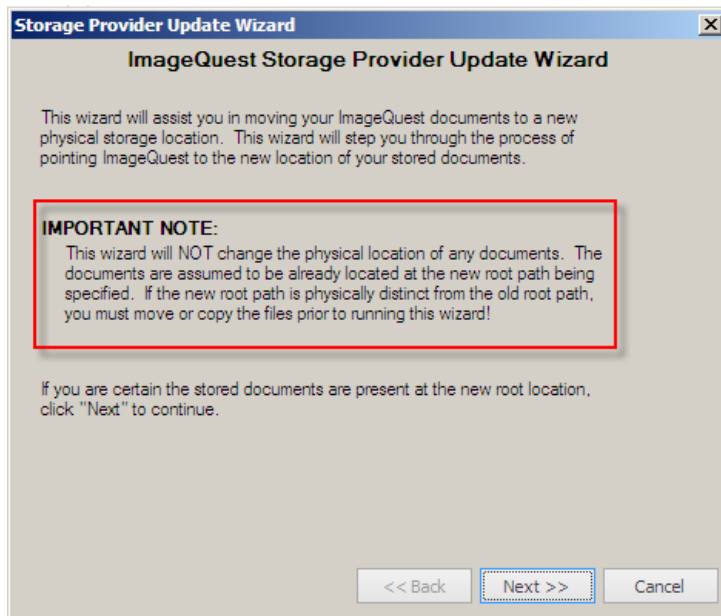
The "Current Root" field, highlighted below, shows the current location of the IQ files. To change the folder, either type in the new path or click "Browse" to choose a new root file path.
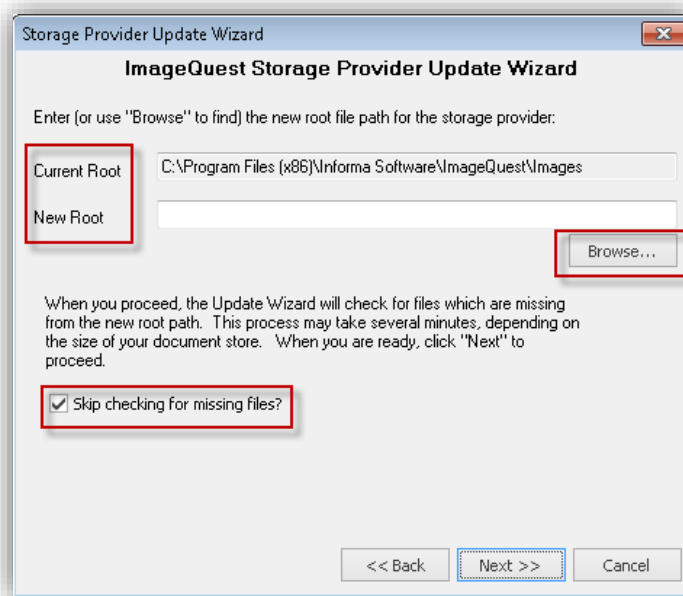
Enter the new root folder in the "New Root" field as displayed below. Click "Next" to proceed. As you proceed, the "Update Wizard" will check for files which are missing from the new root path unless "Skip checking for missing files" is checked; this process may take several minutes depending on the size of your document storage. By default, the "Skip checking for missing files" checkbox is checked. Click "Next".
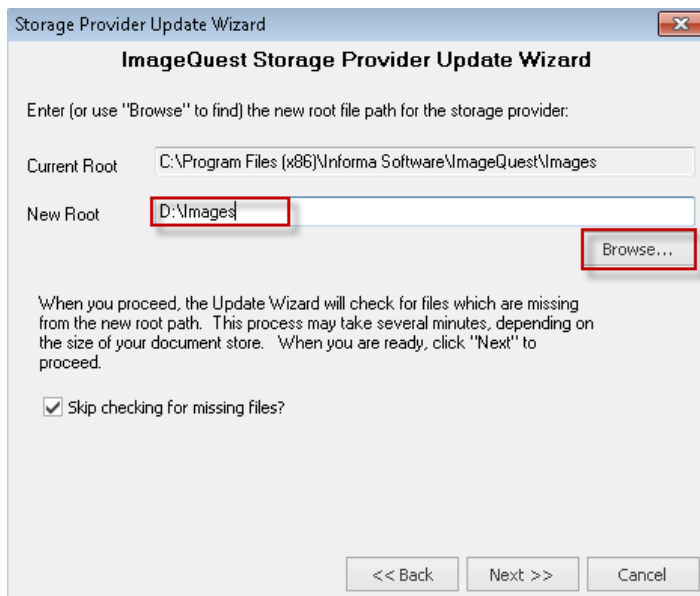
The "ImageQuest Storage Provider Update Wizard" screen prompts the Administrator to update the new file storage root. Click "Finish" to complete this operation as shown below.
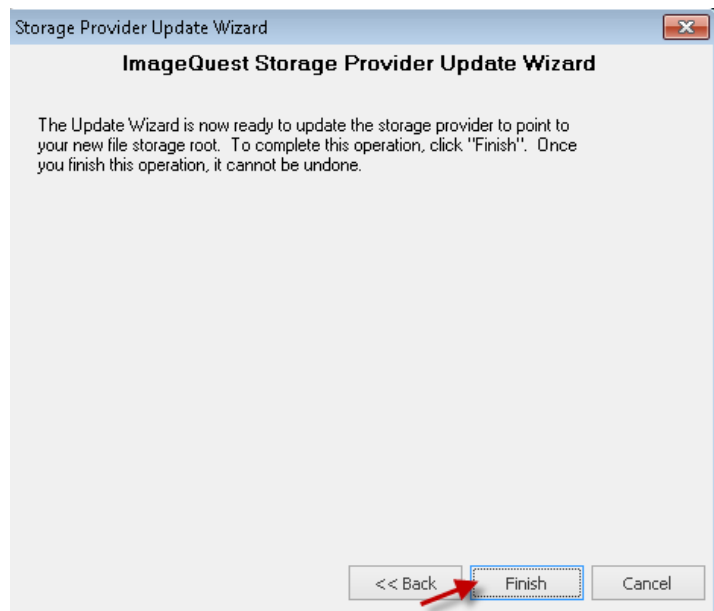
The Manage File Storage screen below now displays the new "Storage location".
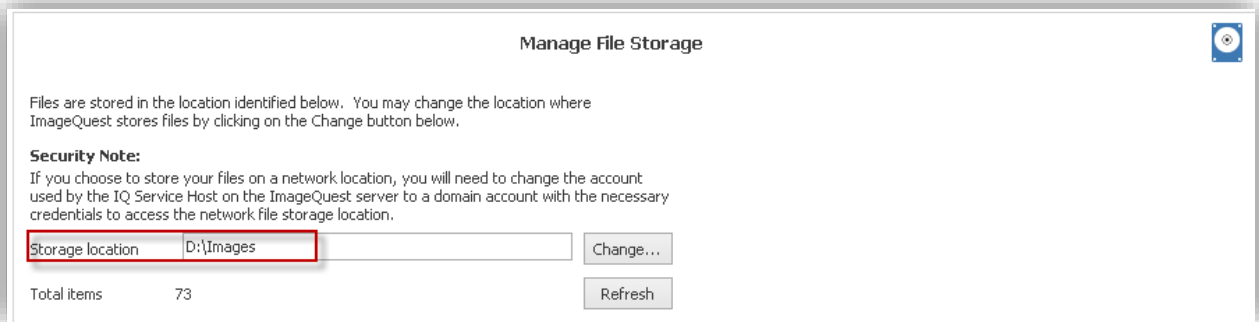
Note: The "Storage Provider Update Wizard" does NOT move any files; it simply allows the Administrator to redirect the physical image storage location for new documents. The Administrator must manually move the existing root folder to the new storage location.

Note: If a network storage location will be used for storage, the IQApplication service will need to have a user account with full control of the shared location. Please see the Advanced Configuration topic.

Configure IQfolder

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

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

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

Configure the folder location path in *IQadministrator*; select **Configure IQfolder** as shown below. Read the highlighted notes in the window for more information.
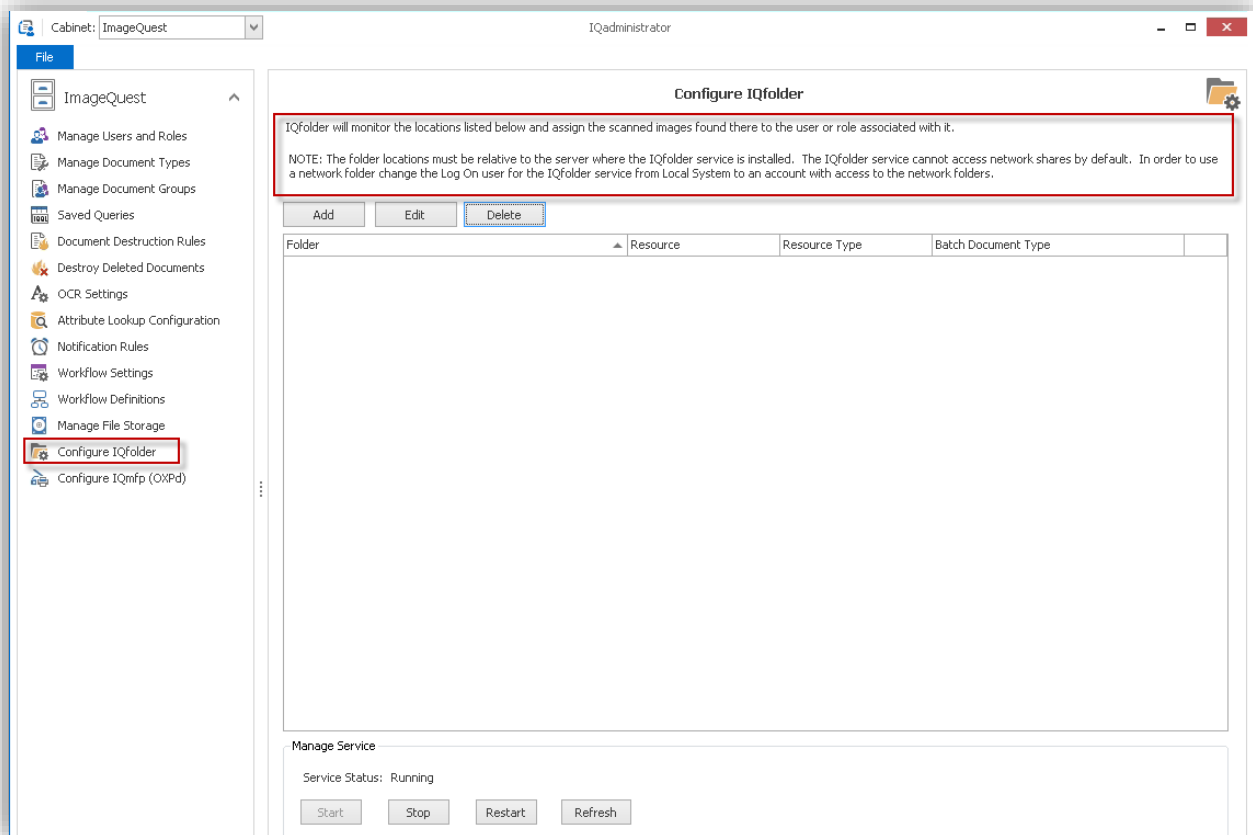
Click "Add" to create a new IQfolder folder.
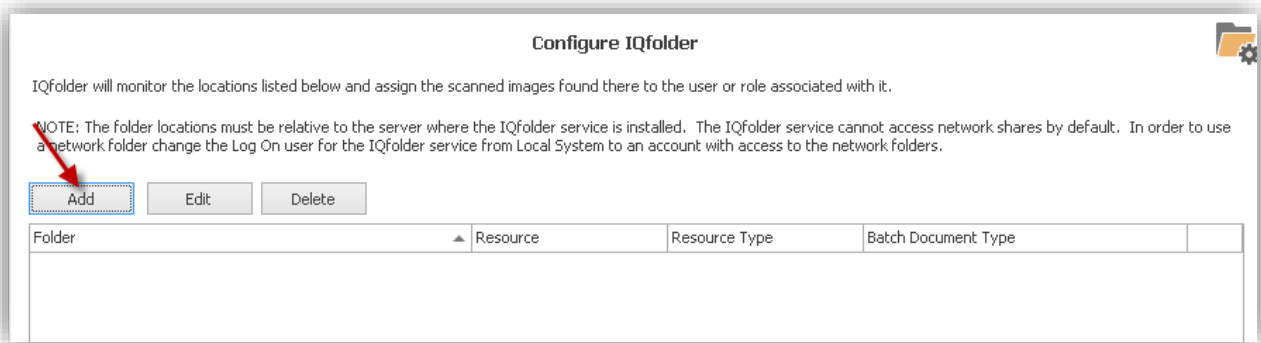
Click the ellipsis button (…) to browse to and/or create the folder to be polled.
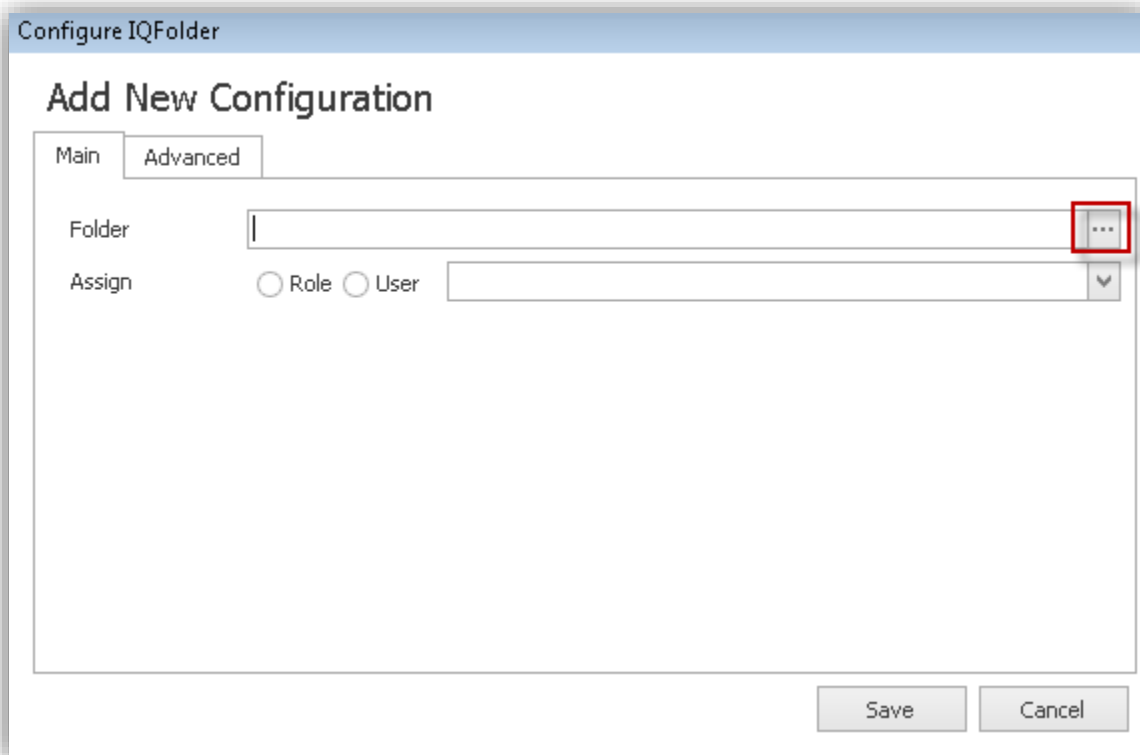
Select the User or Role to assign the folder to.

If the folder is assigned to a Role, the scanned files will appear in the "Indexing Queue" for every member of that Role. Only one user can access and index the file at one time. Once a member of the Role has indexed the file, it will no longer appear in the other member's "Indexing Queue".
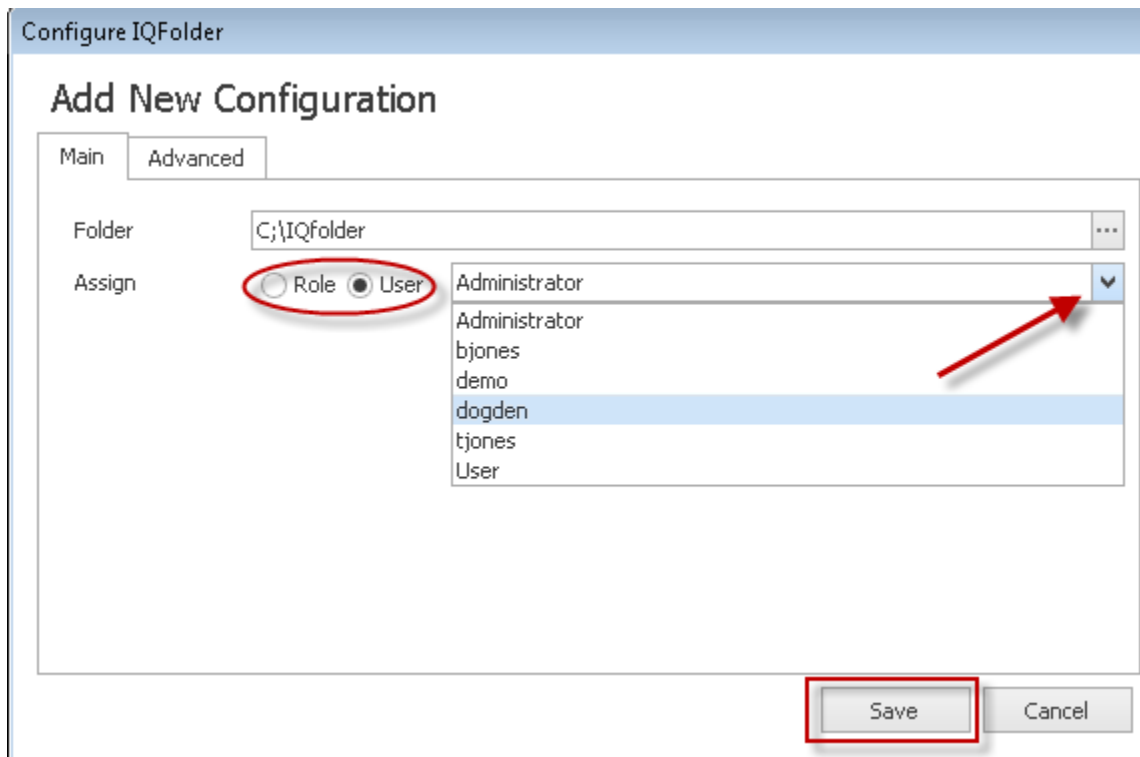
Click the "Save" button to save the changes.
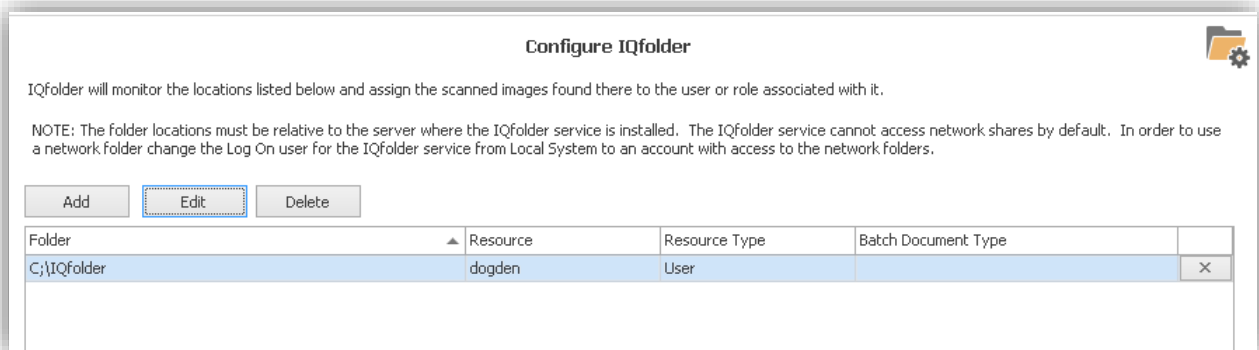
Click "Edit" to modify an existing folder configuration or "Delete" to remove an existing folder. The 'X' at the end of an IQfolder configuration line can also be used to remove an existing folder configuration.

The "Advanced" tab can be used to set default values for attributes and document type on a folder by folder basis. This can be useful for grouping documents in the indexing queue based on the folder in which they came from. This attribute value will also be carried over during the indexing process when a

new document type is selected. In the example below, an attribute called Priority IQ has been added to this folder with a value of 1.

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

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

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

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

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

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

Note: If a network storage location will be used for IQfolder, the IQfolder Image Importing service will need to have a user account with full control of the shared location. Please see the Advanced Configuration Topic.

# Configure IQmfp (OXPd)

Note:
In order to provide the best software and product support for our customers, Informa must periodically retire older versions and certain features of our software. This enables us to dedicate all our resources in delivering the latest features, enhancements and support to our current version - used by most Informa customers. While there is currently no plan to eliminate the IQmfp connector from ImageQuest, this feature will no longer receive any development or support for new devices. Currently, IQmfp requires HP OXPd version 1.4 and newer versions will not be supported.

An alternative solution provided by MFP manufacturers is the ability to scan to network folder. A profile can be created for each user of the device which will place a PDF or TIF image in the specified user's network folder. ImageQuest can be configured to poll each users folder using IQfolder resulting in the same experience as provided by the IQmfp connector.

If you have questions or concerns, please call Informa support at 877-475-7778.

"Configure IQmfp (OXPd)" is the method for adding and managing ImageQuest on supported HP MFP Devices. **ALL HP MFPs MUST BE UPGRADED to OXPd in order to work with ImageQuest version 11.3 or higher.**

Before adding a new device, the OXPd Solution Installer must be installed on the device. **If OXPd is already installed on the device, please proceed to configuration at the end of this topic.**

Confirm Device Model Number and Firmware Versions

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

MINIMUM MEMORY & FIRMWARE VERSIONS SUPPORTED:

The devices covered in this release include the following models:

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

HP device firmware version can be retrieved from the device configuration page.
HP device firmware can be downloaded from http://www.hp.com.
NOTE: Any newer HP MFP device that has OXPd already installed is supported.

Loading the OXPd Solutions Installer onto the device

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

Click the "Browse" of "Choose File" button and locate the OXPd Solution Installer jar file. This jar file is located in the Informa Software application directory on the ImageQuest Server.
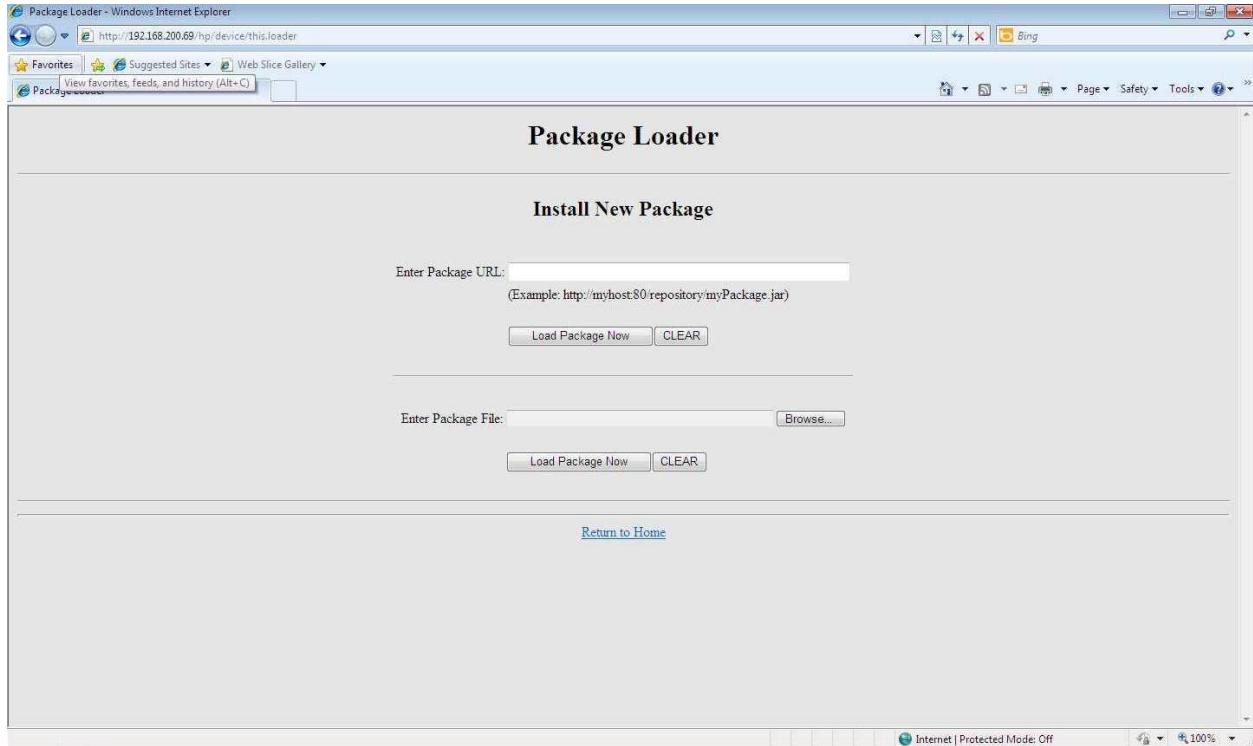
For example, if the ImageQuest Server was installed to C:\Program Files(x86)\Informa Software, the OXPd Solution Installer jar file would be located in C:\Program Files(x86)\Informa Software\ImageQuest\OXPd\SolutionInstaller.

Select hp_oxpdsolutioninstaller-ex-1.0.1.0.jar and click "Open" as shown in the example below.
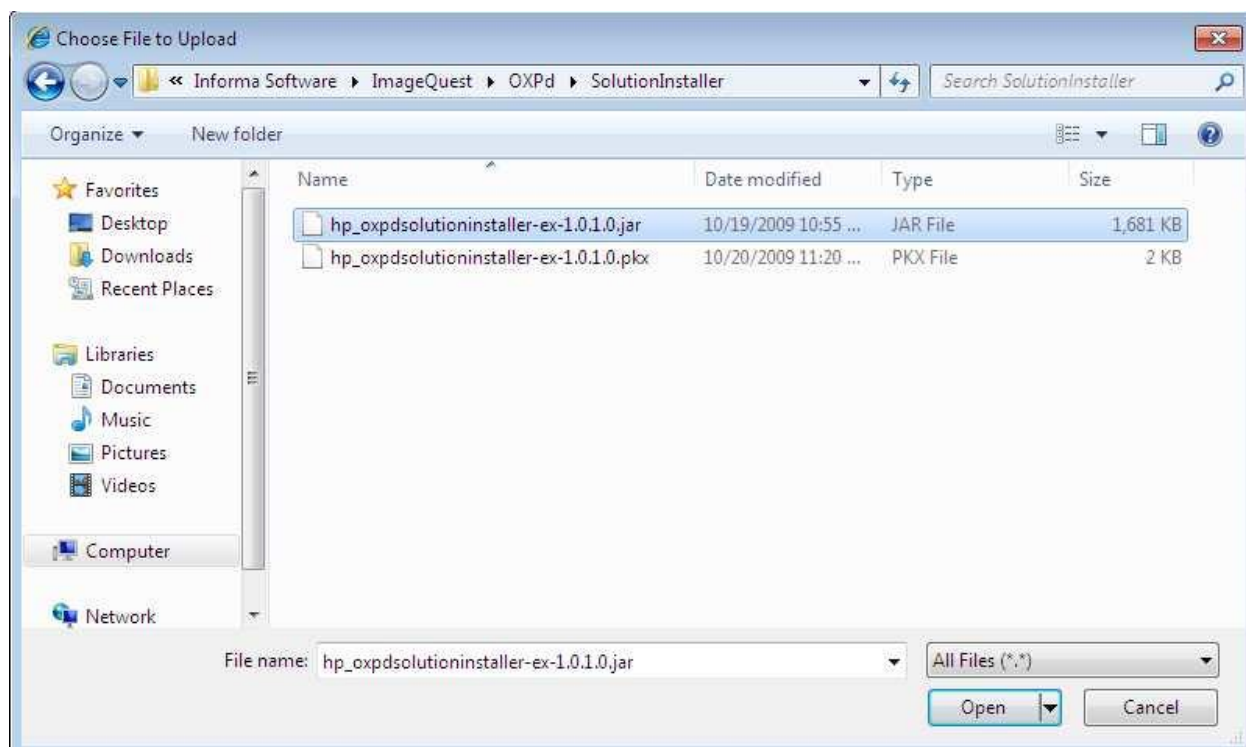
Click "Load Package Now" to load the jar file. It may take a few minutes to load.
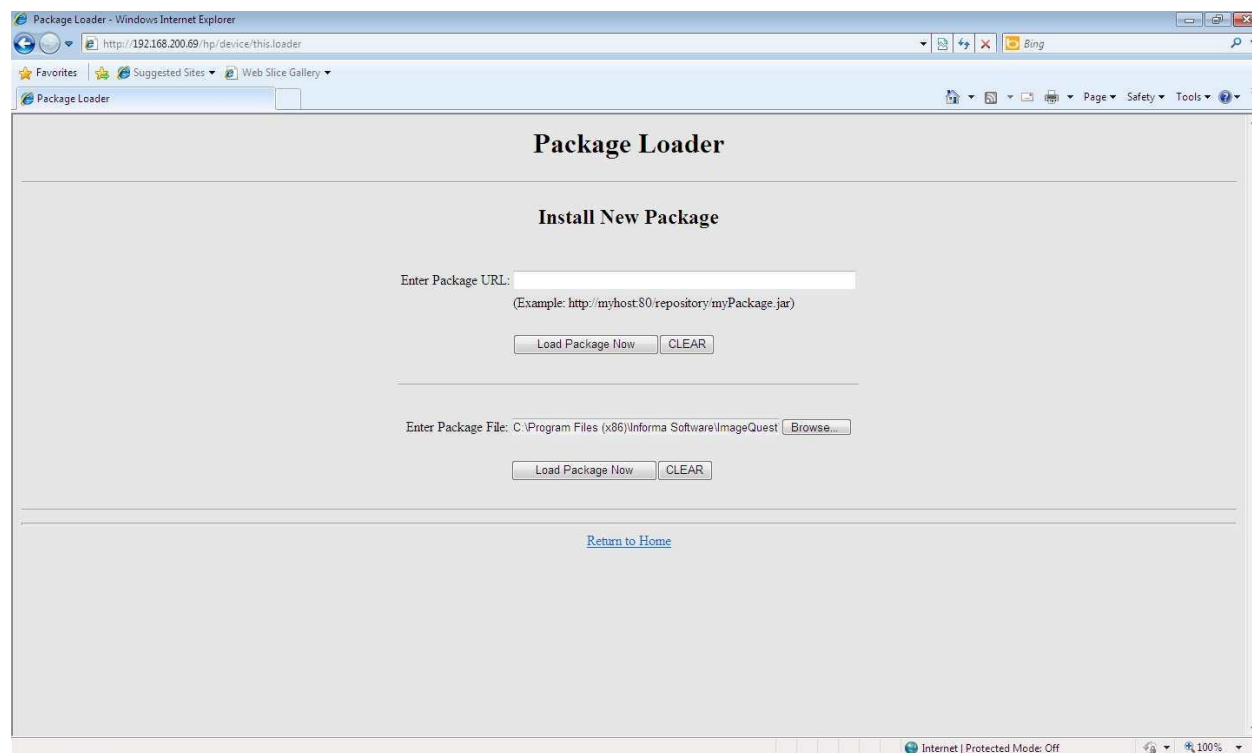
The Package Loader page will confirm the jar file was loaded successfully.

Close the device Package Loader page.
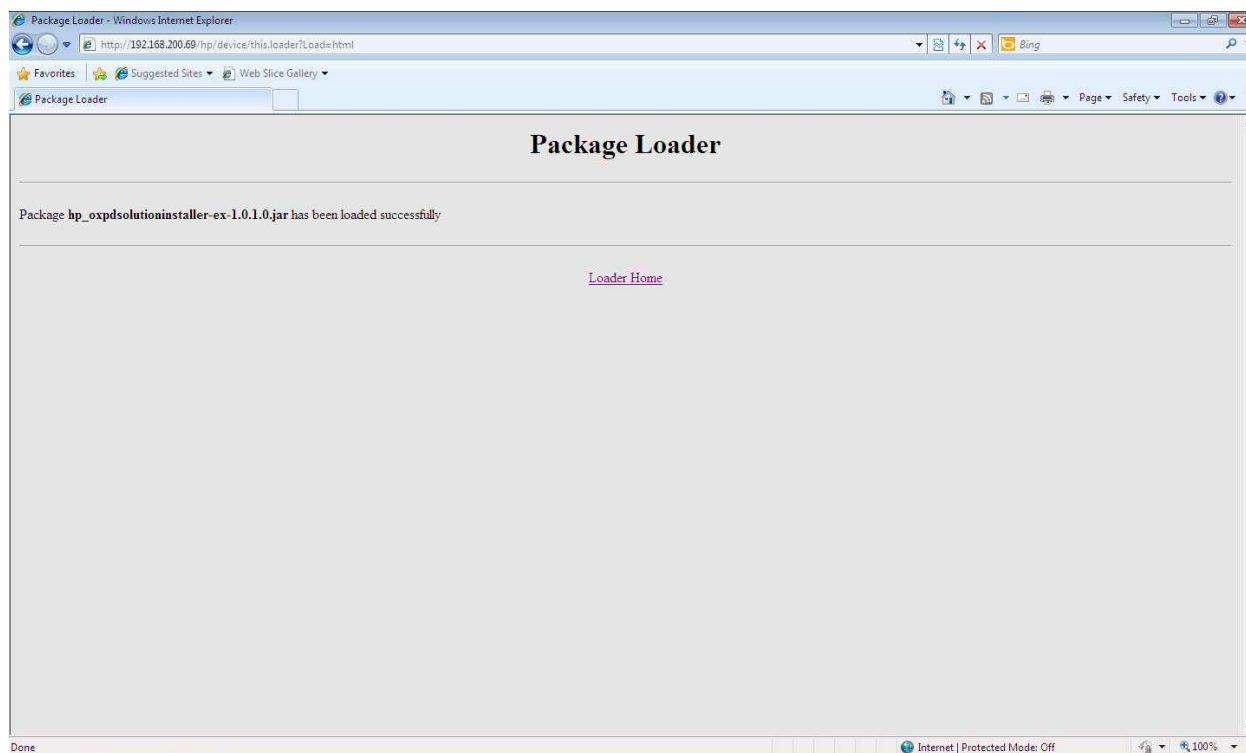
Configure IIS for OXPd

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

Open Internet Information Services (IIS) Manager on the ImageQuest server, expand Sites and right-click Default Web Site and select "Add Virtual Directory".
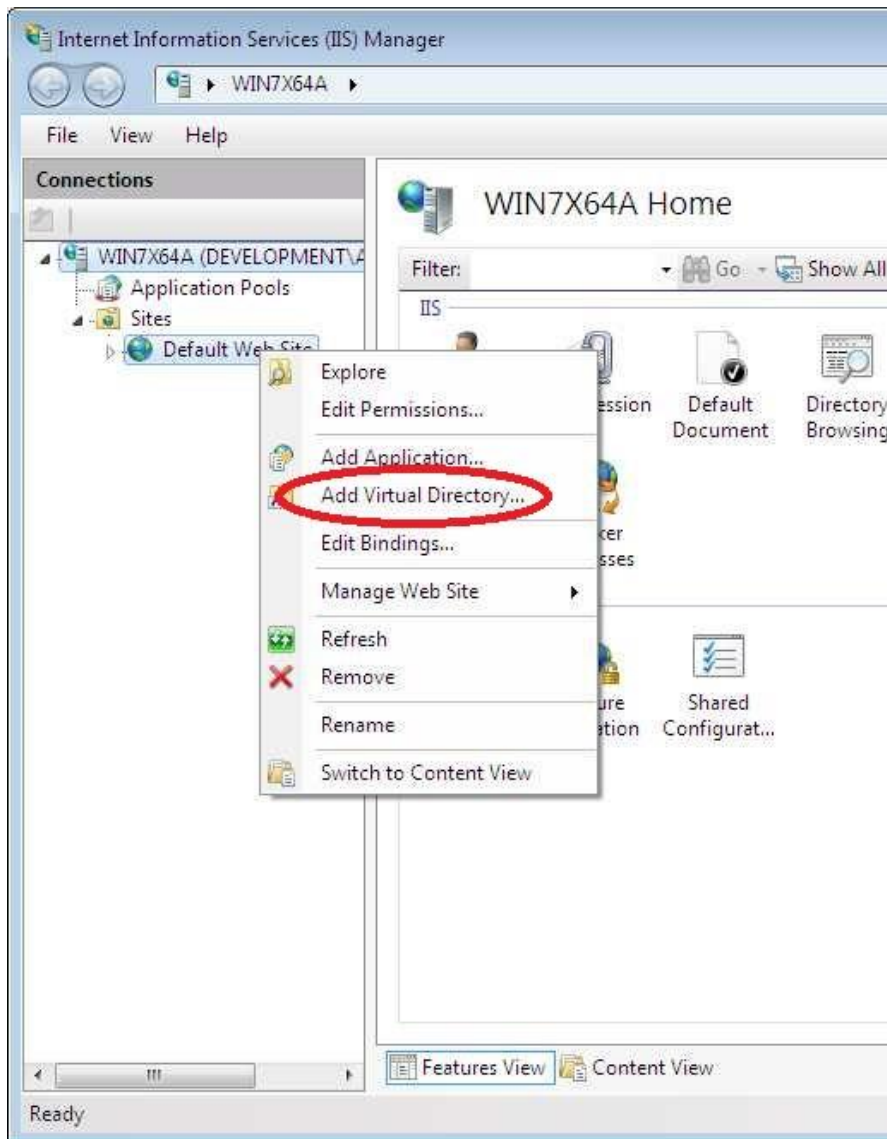
In the Add Virtual Directory dialog, type "OXPd" for the Alias and browse to and use the Informa Software\ImageQuest\OXPd directory on the ImageQuest Server for the Physical path.
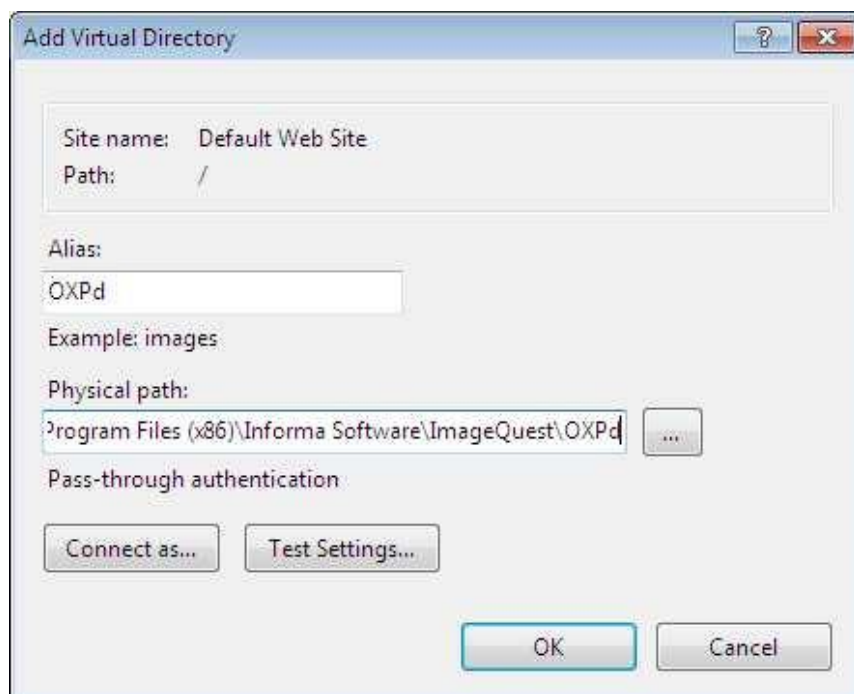
Click "OK" to close to save and add the new OXPd Virtual Directory.

Confirm "Anonymous Authentication" is "Enabled" for the OXPd Virtual Directory by selecting OXPd and double-clicking "Authentication" to view the Status.
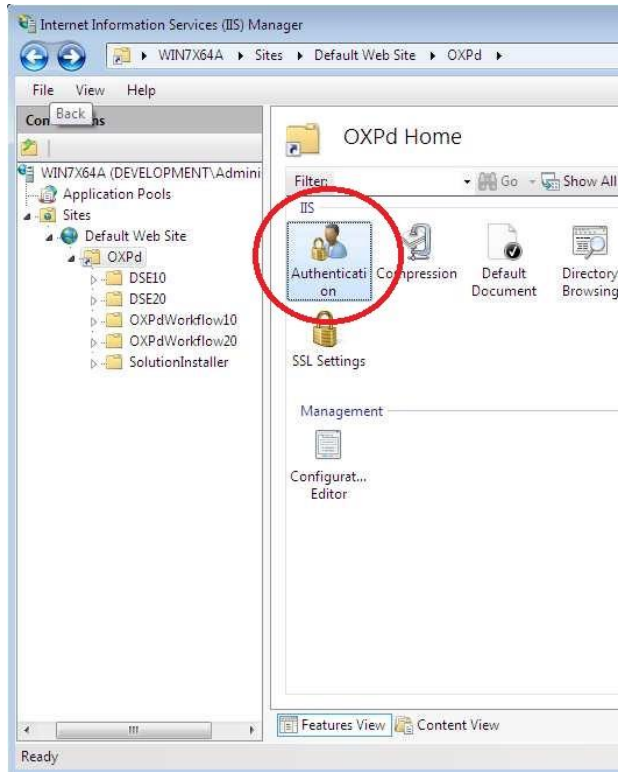
If "Disabled", right-click Anonymous Authentication and select "Enable".
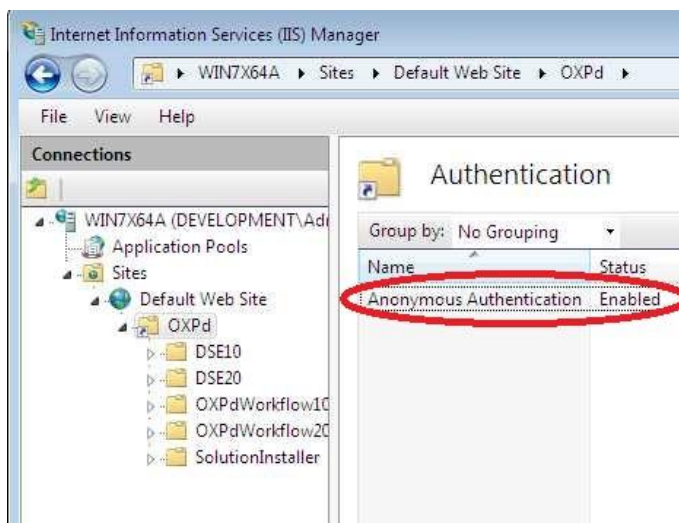
Install OXPd on the device

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

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

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

For **Step 1**, click "Browse" to locate the ChaiSOE_DSE Package manifest. This manifest is located in the Informa Software application directory on the ImageQuest Server.

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

Browse to the proper file folder on the ImageQuest Server and click "Open" to select the manifest.
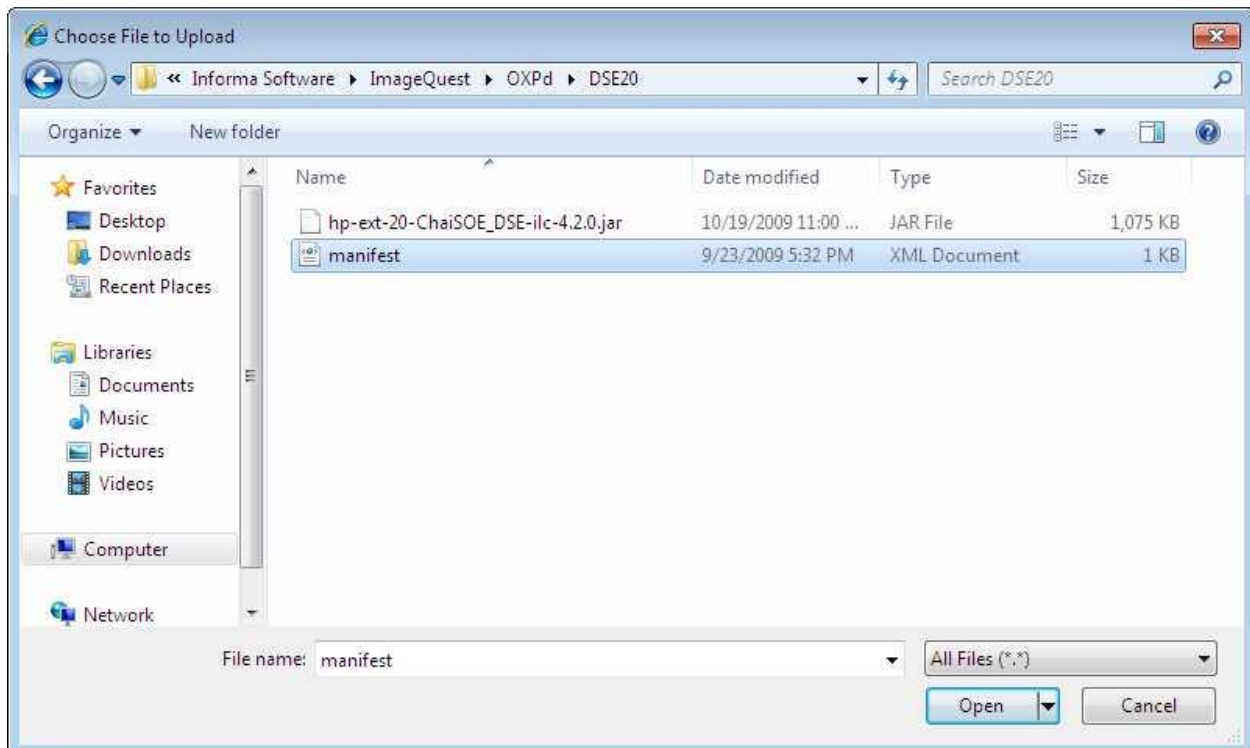
Click "InstallApp" to install the ChaiSOE_DSE package manifest. You may need to provide the HP device admin credentials to proceed.

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

Verify the ChaiSOE_DSE Package manifest loaded successfully by clicking the "ListApps" button above the Reply field and confirm the "loadStatus" for the ChaiSOE DSE "appURL" is "Loaded".

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

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

Browse to the proper file folder on the ImageQuest Server and click "Open" to select the manifest.
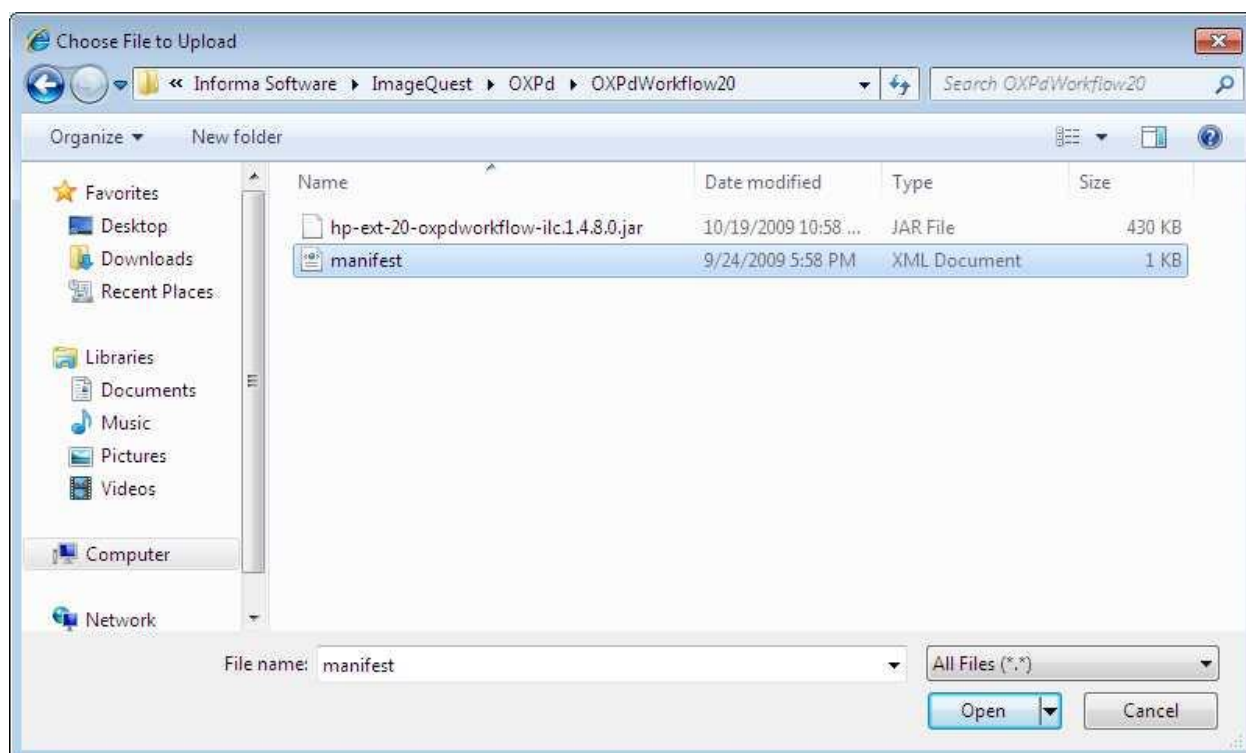
Clck "InstallApp" to install the OXPdWorkflow Package manifest.

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

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

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

To confirm OXPd was successfully loaded onto the device, log into the device Embedded Web Server (EWS) click the "Digital Sending" tab and verify "OXPd:Workflow" is listed in the settings menu. Select "OXPd:Workflow" to view the current settings.
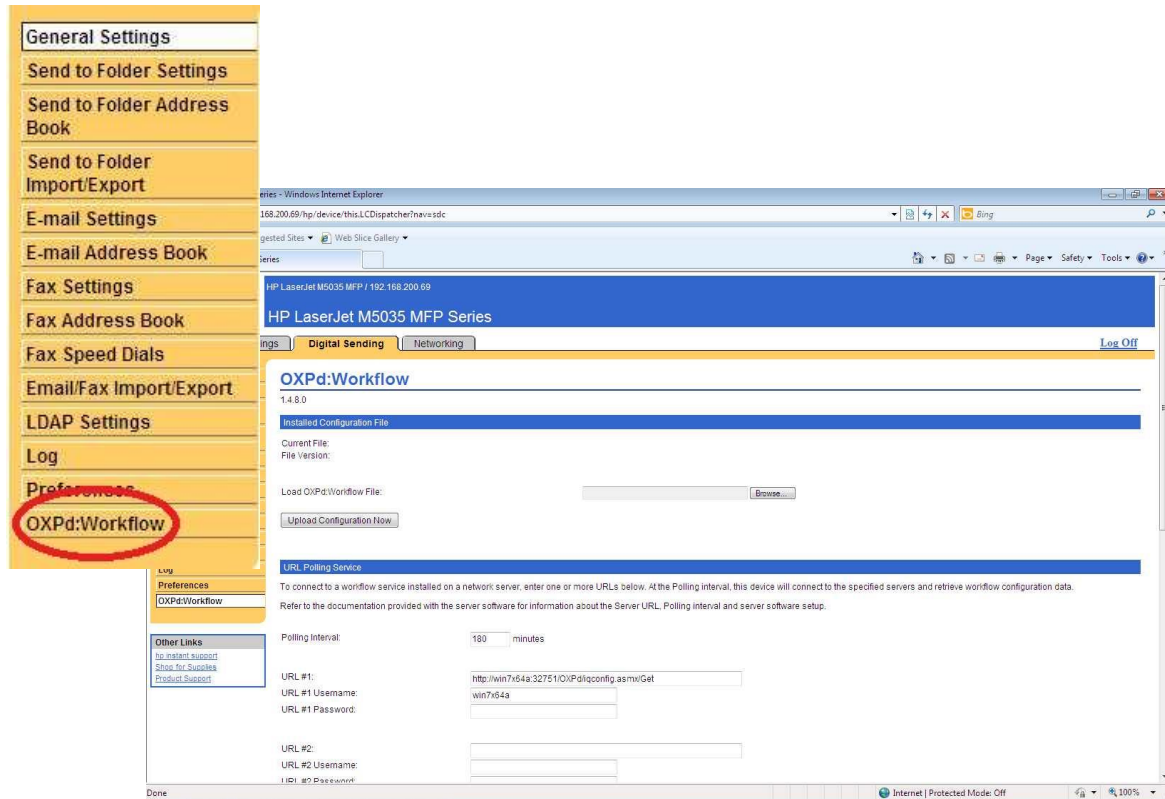
The device is now ready to be added to ImageQuest using Configure IQmfp (OXPd) in IQadministrator. Please make sure your device is licensed prior to adding it to ImageQuest.

Click "New" to add a new device. The IQ Server field will be populated with the ImageQuest server information.
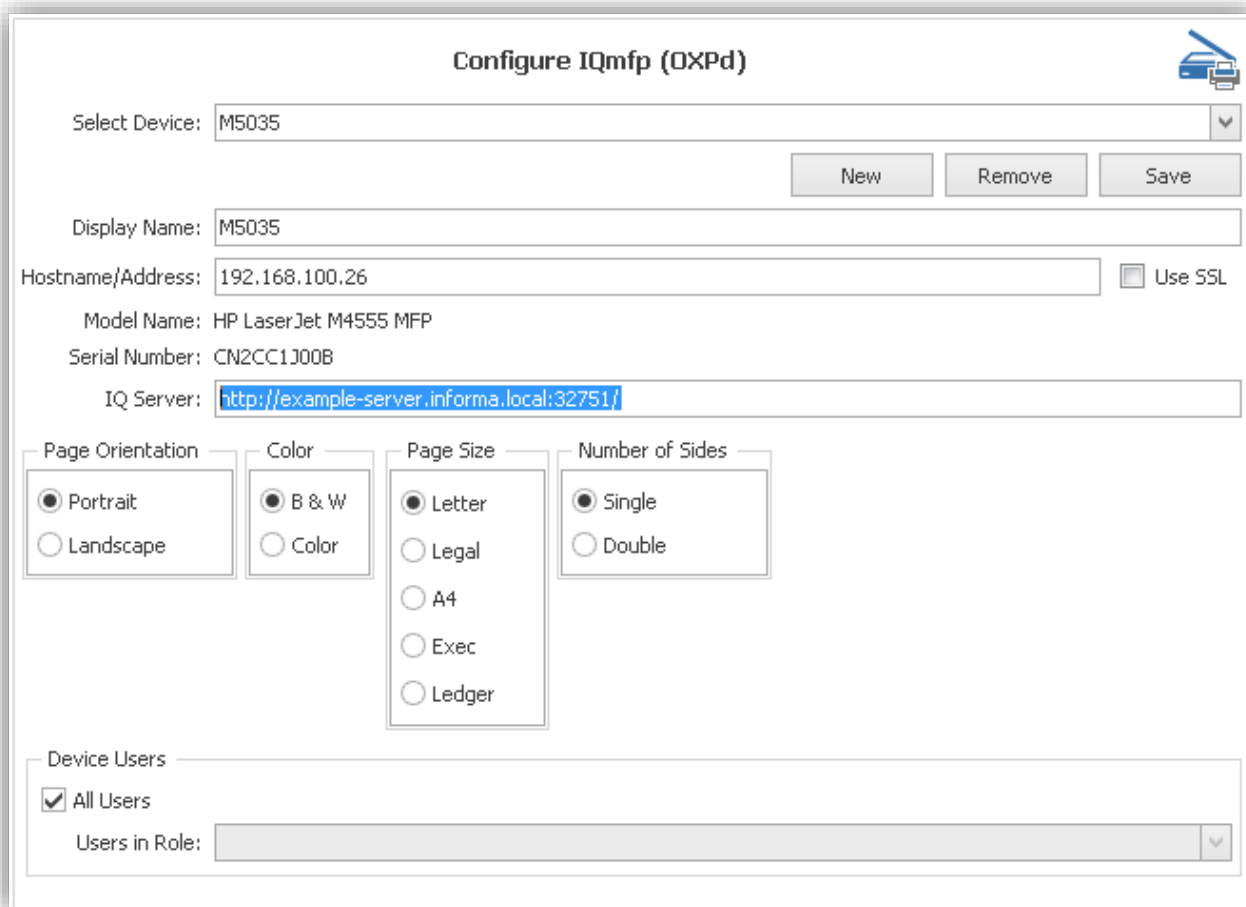
Enter the Display Name and Host Name/IP Address for the new device. In the example below, "M5035" is used for Display Name and IP address "192.168.100.26" is used for Hostname/Address. Press the Tab key to connect to the Mfp device.

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

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

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

Click "Save" to add IQmfp to the Mfp device front panel. You will be prompted to provide the device administrator credentials before the process can complete.
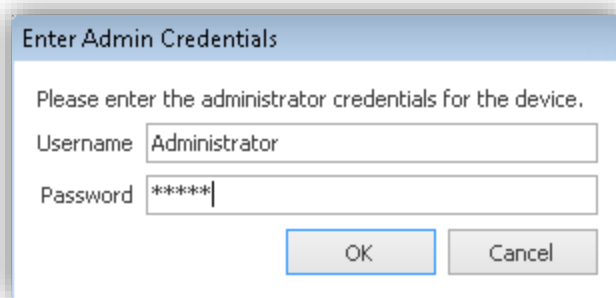
The following message confirms the device was added successfully.
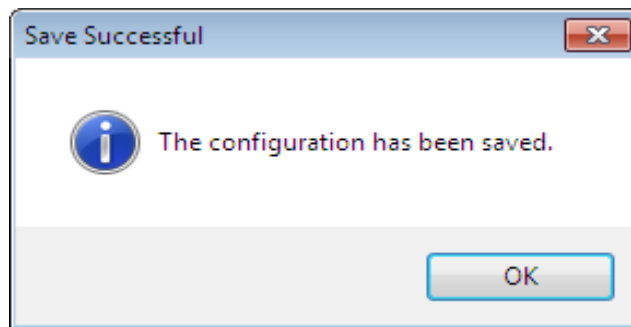
NOTE: See the ImageQuest User's Guide for information on using OXPd.

Advanced Configuration

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

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

Microsoft Windows Services

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

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- "IQApplication Service Host"
- "IQ OCR and Full Text Service"
- "IQfolder Image Importing Service"

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

Note: If your File Storage (images) for ImageQuest are located on a network share or location NOT local to the IQ Server, you will need to change the "IQ Application Service" Log on as account with an account that has read/write access to that share.

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

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

To configure the service to use domain credentials, open the Microsoft Windows Services application; go to Start > Control Panel > Administrative Tools > Services. Locate and double-click the **IQfolder Image Importing Service** as shown below**.**
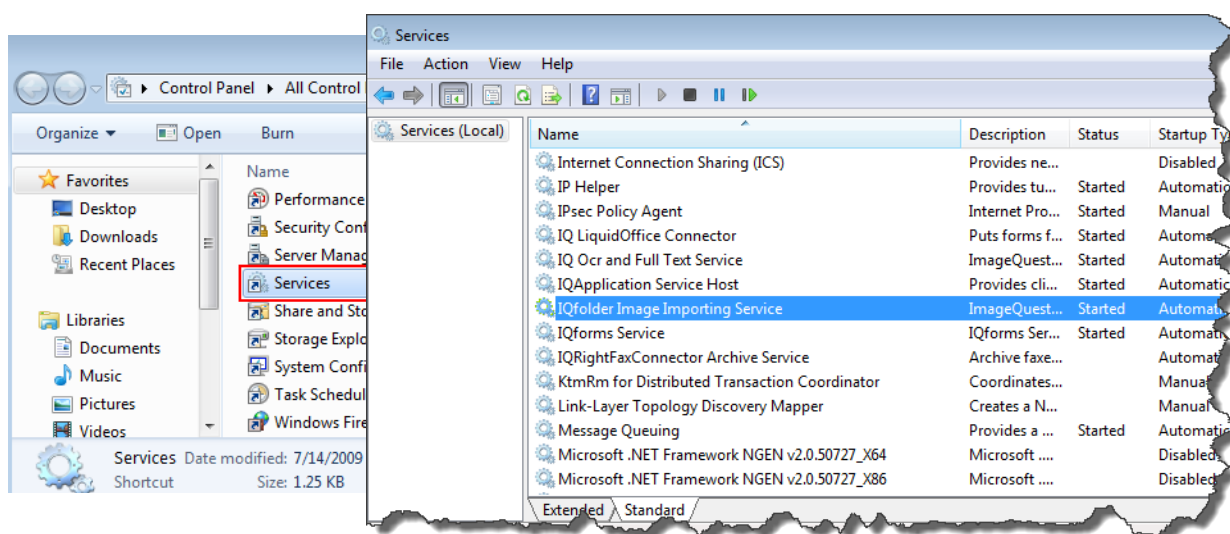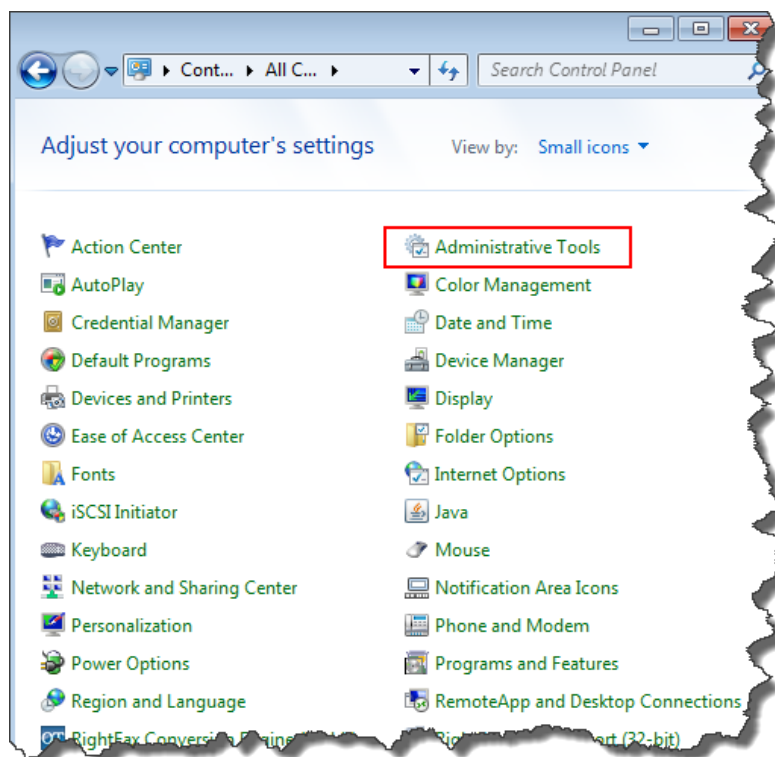
Click the "Log On" tab, select "This account" and enter a username and a password. The user specified here must have access to read and modify **ALL** folders created in IQfolder. Click "OK".
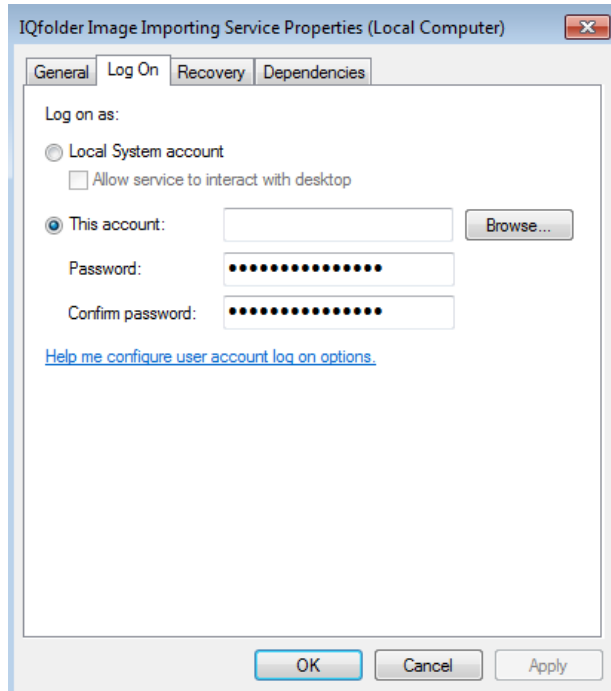
Restart the IQfolder service in order for the changes to take effect.

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

Database Configuration Utility

The Database Configuration Utility is included on the ImageQuest server and allows the administrator to update the SQL server credentials. This can be used if the ImageQuest database is moved to another SQL server or if the SQL login credentials have changed. The utility can be found in the Service directory of the ImageQuest installation usually at *C:\Program Files (x86)\Informa Software\ImageQuest\Service* and it's called Informa.ImageQuest.DatabaseConfiguration.
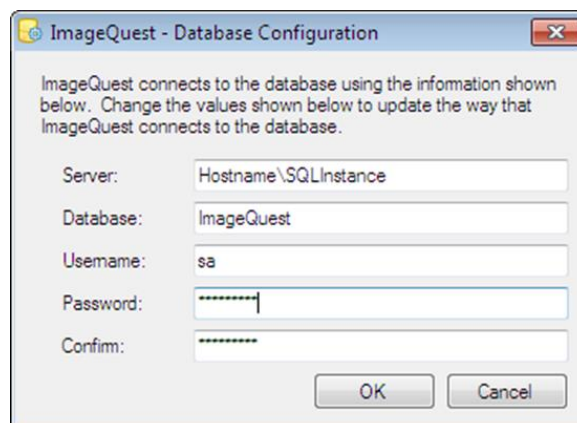
Note: The IQApplication Service Host must be restarted after making a change to the database credentials.

Report View

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

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

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

WebIQ

Configure WebIQ in Web Server (IIS) on Server 2008 R2 or Server 2012

Before configuring WebIQ in Web Server (IIS), please confirm the following IIS features have been installed:

Common HTTP Features

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

Application Development

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

Health and Diagnostics

- HTTP Logging
- Request Monitor

Security

- Windows Authentication
- Request Filtering

Performance

- Static Content Filtering

Management Tools

- IIS Management Console

Windows Server 2012 R2 also requires the following features to be enabled:

.NET Framework 4.5 Features

- ASP.NET 4.5

WCF Services

- HTTP Activation

To configure WebIQ, please follow these steps:

1) Open Server Manager>Roles>Web Server (IIS)>IIS Manager
2) Expand the server name tree
3) Expand Sites
4) Select Application Pools
5) Right click and select 'Add Application Pool'. Type 'ImageQuest' and Select '.NET Framework v4.0' for .NET CLR version and 'Classic' for Manage pipeline mode and click 'OK'
6) In the right pane, click 'Set Application Pool Defaults' and set 'Enable 32-bit Applications' to True. Click 'OK'
7) Right click on Default Web Site and select "Add Application"
8) In the Alias box, type "WebIQ"
9) Click "Select" to change the Application pool to "ImageQuest" and click "OK"
10) Click the ellipses next to the "Physical path" box and browse to C:\Program Files (x86)\Informa Software\ImageQuest\WebIQ and click "OK". WebIQ should now be listed under Default Website
11) Select WebIQ
12) In the WebIQ Home section on the right, double click "Authentication"
13) Make sure that "Anonymous Authentication" is Disabled (if on a workgroup environment, leave this Enabled)

14) Enable "ASP.Net Impersonation", "Forms Authentication: and "Windows Authentication"

15) Highlight Windows Authentication, click Providers in the right pane and verify NTLM is first on the list.

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

17) If a firewall is enabled on the IQ server, make sure port 80 is open

18) From the ImageQuest server, browse to http://localhost/webiq/default.aspx and confirm the WebIQ homepage is accessible

IQ RightFax Archive Connector

Fax servers are designed for receipt and delivery of fax communications in a networked environment. Often, problems occur when companies permit fax servers to store those faxes long-term. In order to eliminate storage and performance problems on the fax server itself, companies require a way to offload fax storage to a repository for long-term storage and easy retrieval.

The IQ RightFax Archive Connector is an archival solution for companies who use OpenText RightFax and wish to keep their fax server running efficiently. In addition, the IQ RightFax Archive Connector provides enterprise-wide access to archived fax content without the need for client software installation.

IQ RightFax Archive Connector connects an OpenText RightFax Server to ImageQuest for fax archiving. The Rightfax Connector is not configured by default in IQ. If the Rightfax Connector is not installed, place the IQmfp CD in the CD-ROM drive on the IQ server. Select "Install IQmfp Addons" and then "Install RightFax Connector."   During the installation, you will be prompted to select the cabinet in which you would like to have archiving performed. When the install is complete, a new link called "Configure RightFax Connector" is added in IQadministrator.

Note: The IQ RightFax Archive Connector must be licensed in order for the link to appear in IQadministrator.

Document Types

The Document Types for the RightFax connector are set by default to Inbound Fax and Outbound Fax. Both document types are created during the RightFax Connector installation and will be listed under Manage Document Types. The mappings for either fax type can be changed to use another Document Type if necessary; however, we recommend leaving them set to the default document types.

Manage Document Types

Document Types	Attributes

Add...   Edit...

Inbound Fax
MFP Scan
Outbound Fax

○ By default, allow all users permission to this document type
● By default, do not give permission to this document type.

Assign attribute to Inbound Fax

[dropdown]   Assign   Add New Attribute...

Name	Data Type	Required	Default	Minimum	Maximum	Include in Filename	Input Mask
FaxRecordDateTime	Date & Time	No				No	Date with Time
FromFaxNumber	Text	No				No	
FromGeneralFaxNumber	Text	No				No	
FromGeneralVoiceNumber	Text	No				No	
FromName	Text	No				No	
FromVoiceNumber	Text	No				No	
OwnerID	Text	No				No	
RemoteID	Text	No				No	
StatusDescription	Text	No				No	
ToCompany	Text	No				No	
ToEmailAddress	Text	No				No	
ToFaxNumber	Text	No				No	
ToName	Text	No				No	
UniqueID	Text	No				No	

Manage Document Types

Document Types	Attributes

Add...   Edit...

Inbound Fax
MFP Scan
Outbound Fax

○ By default, allow all users permission to this document type
● By default, do not give permission to this document type.

Assign attribute to Outbound Fax

[dropdown]   Assign   Add New Attribute...

Name	Data Type	Required	Default	Minimum	Maximum	Include in Filename	Input Mask
BillingCode1	Text	No				No	
BillingCode2	Text	No				No	
FaxRecordDateTime	Date & Time	No				No	Date with Time
FromFaxNumber	Text	No				No	
FromGeneralFaxNumber	Text	No				No	
FromGeneralVoiceNumber	Text	No				No	
FromName	Text	No				No	
FromVoiceNumber	Text	No				No	
OwnerID	Text	No				No	
RemoteID	Text	No				No	
StatusDescription	Text	No				No	
ToCompany	Text	No				No	
ToEmailAddress	Text	No				No	
ToFaxNumber	Text	No				No	
ToName	Text	No				No	
UniqueID	Text	No				No	

Note: In order to search Inbound or Outbound faxes in ImageQuest, the user must have permissions to the document types.

Configure RightFax Connector

System Configuration Settings

This section allows the IQadministrator user to set the RightFax server configuration, Document Type assignments for Inbound and Outbound Fax, and archive options.

See the table on the next page for a list of archive options and descriptions.

Option	Description
Archive Inbound Fax	If checked, the service will archive inbound faxes
Archive Outbound Fax	If checked, the service will archive outbound faxes
Check Archive Flag	After a fax is archived, the RF db record is flagged as archived so the connector doesn't attempt to archive again (meant to help speed up archiving)
Delete After Archive	If checked, all faxes archived by the service will be permanently deleted from the RightFax server
Perform OCR	If checked, archived faxes will go thru text extraction and conversion to searchable PDF
Index Inbound Fax	If checked, inbound faxes that are archived will be added to each user's Indexing Queue
Select additional fields to archive	This is a list of additional index fields that can be archived with a fax. See Index Fields table starting on Page 152 for Field Name and Description.
Deleted Items User	RightFax user to be used as the "recycle bin" and should not be listed in the ArchiveUser list
Connect Type	What protocol to use for connecting to the RightFax server
Archive Days	Number of days from the time a fax is entered in RightFax to the time it will be archived by the connector (*Default: 6*)
Archive Interval Minutes	How often the service checks for new faxes to archive (*Default: 60*)
Enable Document Group Security	If enabled, IQ will automatically create a user and Document Group for every RightFax OwnerID being archived. The RightFax OwnerID and the Fax Admin Role will be granted access to this group automatically.
Fax Admin Role	The role that will be granted access to the Document Group for every RightFax OwnerID being archived.

Archive User List

This is the list of RightFax users who will have their faxes archived. If no Archive Users are added, the service will archive all users.
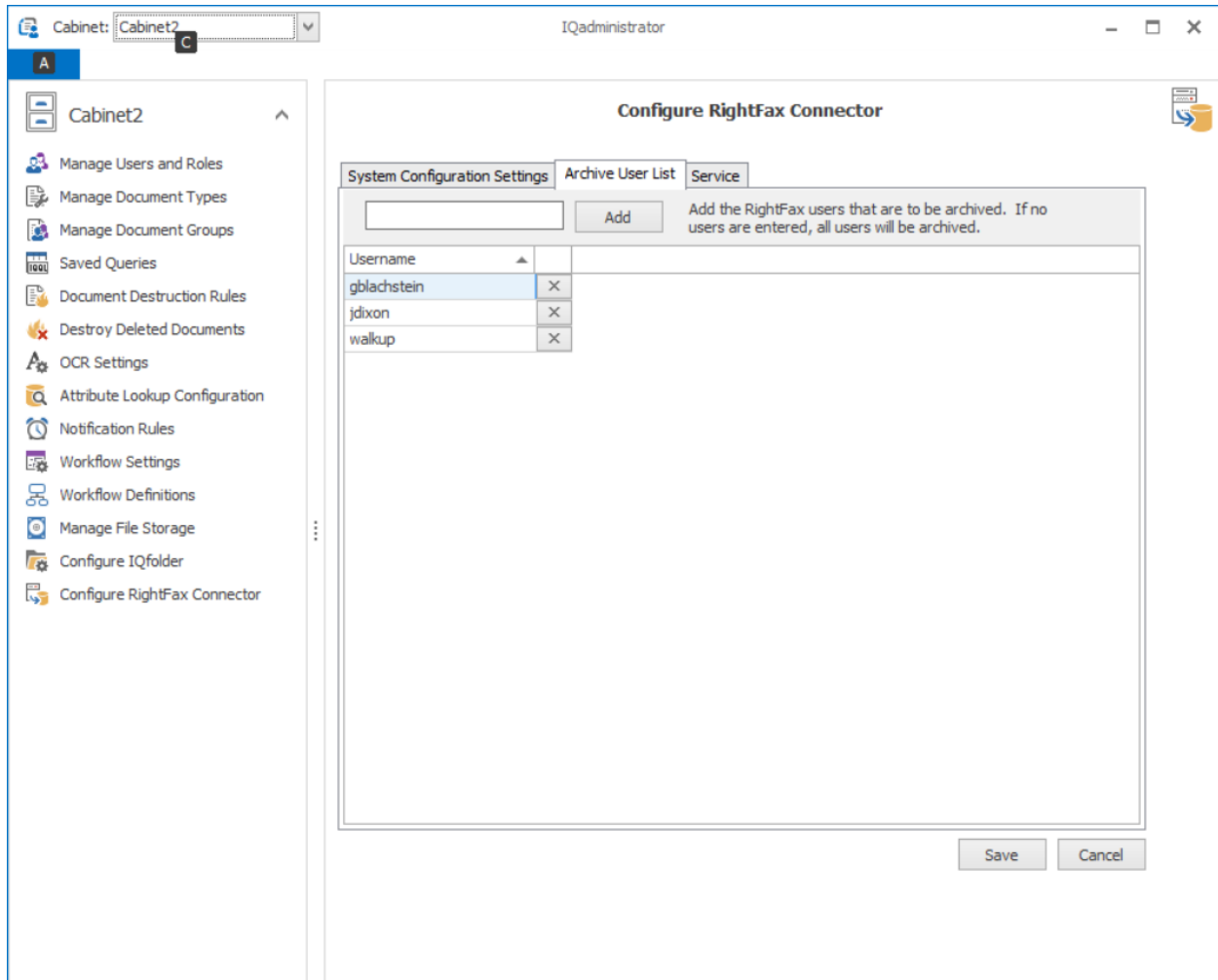
Note: When the connector archives a fax, if the RightFax OwnerID does not exist as a user in ImageQuest, it will be created automatically with a blank password. Single Sign-On (SSO) accounts will be created for RightFax users which are configured for NT Authentication.

Service

This section allows the IQ administrator user to manage the archive service. The service shows as "IQRightFaxConnector Archive Service" in Windows services.
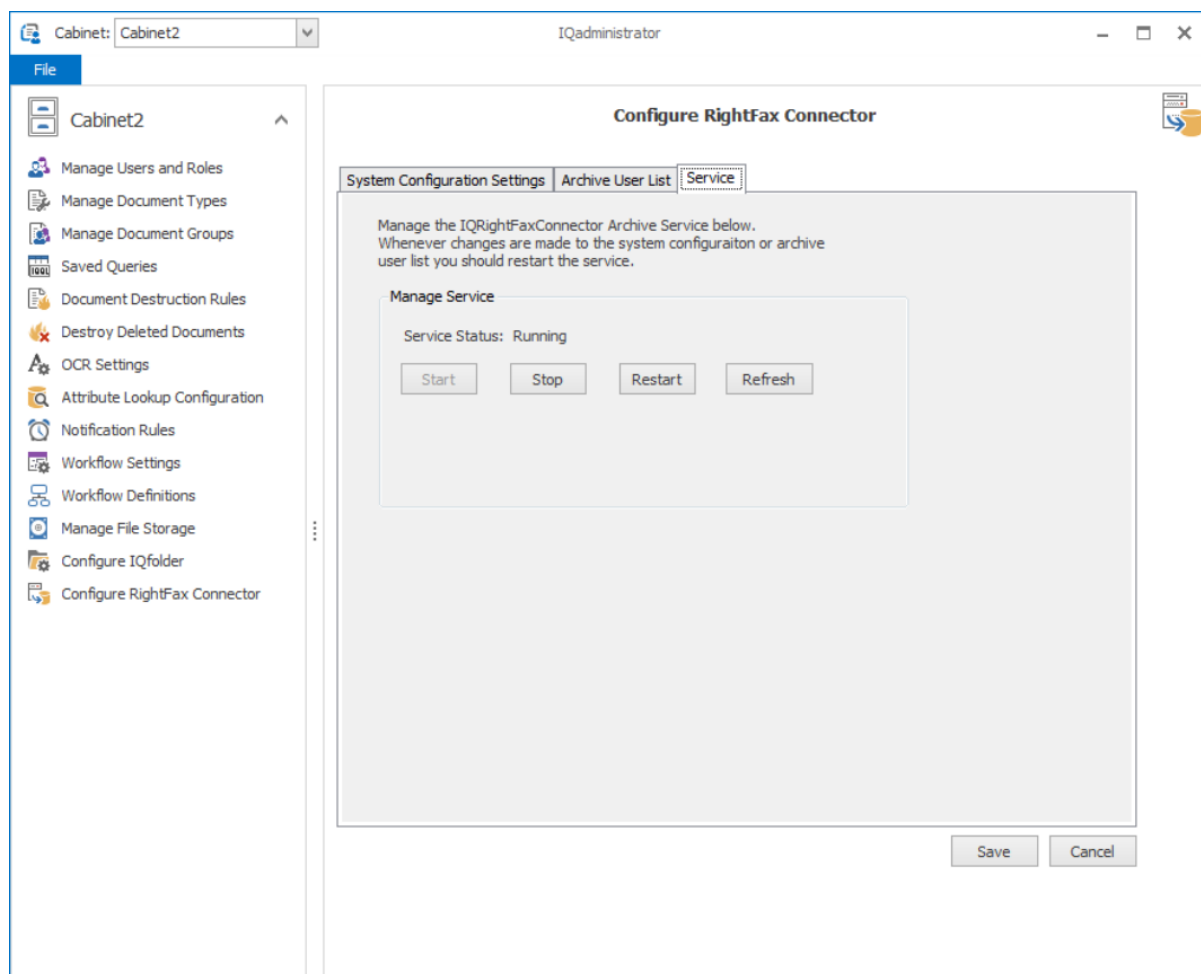
Note: If any changes are made to the archive user list or system configuration, you must restart the service. Once finished, click the "Save" button at the bottom of the screen.

Index Fields

Field Name	Description
AutoForwardCount	Returns the number of times that the fax has been forwarded using the AutoForward feature. This number is tracked for each fax in order to prevent infinite forwarding loops. By default the maximum number of allowed AutoForward events is 5.
BFTFilename	Returns the file name of the binary file transfer information file if one exists. Binary file transfers have been replaced by the fax image attachment, but this property remains available for backwards compatibility.
BFTFileSize	Returns the size of the binary file transfer information file if one exists. Binary file transfers have been replaced by the fax image attachment, but this property remains available for backwards compatibility.
ChannelToSendOn	Specifies the channel on which to send the current fax.
CoverSheetNotes	Specifies a specific note line for the cover sheet. Each line of notes is a string and can include up to 69 characters. The cover sheet may include up to 24 note lines, each identified by an index number starting with 1 (cannot exceed 24).
CoverSheetSizeInBytes	Returns the size of the fax cover sheet in bytes.
DelayFaxSendDateTime	Specifies the date and time that the fax should be sent in Visual Basic variant format.
FaxErrorCode	Returns the FaxErrorCodeType. A zero indicates that there was no error. The FaxErrorCodeType will be one of the following enumerated values. Table 4c FaxErrorCodeType Enumerated Values
FaxFilename	Returns the name of the image file associated with an incoming fax. The image file is stored in the image folder on the fax server. Note that this property returns the file name, not the image object.
FaxID	Returns the ID assigned to the fax by the fax hardware when the fax is schedule to be sent.
FaxStatus	Returns the status of the fax as a FaxStatusType. This will be one of the valid FaxStatusType enumerated values.
FCSFilename	Specifies the name of the fax cover sheet image in the server's image folder. See also the "OriginalFCSFilename" property
Folder	Specifies the Folder object to which this fax belongs.
HasCoversheet	Indicates whether or not the fax has a cover sheet. It is only valid for outgoing faxes. True or 1 indicates there is a cover sheet; False or 0 indicates there is no cover sheet. The cover sheet is stored as a file on the server and can be specified using the "FCSFilename" property. Each user can specify a default cover page setting with the "IsCoverPageDefaultedOn" property, or a group may be required to use a cover sheet based on the "MustHaveCoversheet" property.

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HasHotlink	Indicates whether or not the fax has a hotlink.
HasPDF	Indicates whether or not the fax has a rich PDF document associated with it.
ImageSizeInBytes	Returns the size of the fax body in bytes.
IsApproved	Indicates whether or not the fax has been approved. True or 1 indicates it has been approved; False or 0 indicates it has not been approved.
IsBillingCodesVerified	Indicates whether or not the "BillingCode" attachment has been checked against the list of valid billing codes. True or 1 indicates the BillingCodes have been checked and are valid. False or 0 indicates that they are not valid billing codes.
IsBroadcastFax	Specifies whether or not the fax is a broadcast fax. True or 1 indicates that the fax is a broadcast fax, and the status will not be updated until the entire job is complete (thus saving machine overhead).
IsCallbackRequested	Indicates whether or not the sender requests a call from the recipient. True or 1 indicates that a callback is requested; False or 0 indicates that no such request has been made. This property only applies to sent faxes. The default setting for callback request is set 965
IsCertifyDelivered	Indicates whether or not the fax was sent via certified delivery.
IsCoversheetConversionNeeded	Specifies whether or not the cover sheet for the fax needs to be converted to a TIFF format image file. True or 1 indicates that conversion is required; False or 0 indicates that it is not required.
IsCoversheetFine	Specifies whether or not the cover sheet is in Fine mode. True or 1 indicates that the cover sheet is in Fine mode (200×200 dots per inch resolution); False or 0 indicates that it is in normal mode (100×100 dots per inch resolution). See also the "IsFineMode" property.
IsDeleted	Specifies whether or not the fax has been deleted. True or 1 indicates that the fax has been deleted from the server. False or 0 indicates that it has not been deleted.
IsDeletedAfterAnySend	Specifies whether or not the fax will be deleted from the server after the Send event, whether the fax is successfully sent or not. Set this to True or 1 to indicate that the fax will be deleted. Set it to False or 0 to indicate that it will not be deleted. See also the "IsDeletedAfterSuccessfulSend" property.
IsDeletedAfterSuccessfulSend	Specifies whether or not the fax will be deleted from the server after a successful Send event. Set this to True or 1 to indicate that the fax will be deleted. Set it to False or 0 to indicate that the fax will not be deleted. See also the "IsDeletedAfterAnySend" property.
IsFaxAutoForwarded	Specifies whether or not the fax was automatically forwarded. The AutoForward feature is set and type of forwarding defined in the User object. True or 1 indicates that the fax was automatically forwarded. False or 0 indicates that the fax was not forwarded. See also the "IsForwarded" property.
IsFaxBodyAutomaticallyPrinted	Specifies whether or not the fax was automatically printed. The Autoprint feature is set and the printer defined in the User object. True or 1 indicates

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	that this fax was automatically printed. False or 0 indicates that this fax was not forwarded.
IsFCSCompleted	Specifies whether or not the fax cover sheet has been completed. True or 1 indicates that the cover sheet is complete. False or 0 indicates that the cover sheet is not complete.
IsFineMode	Specifies whether or not the body of the fax is in Fine mode. True or 1 indicates that the fax is in Fine mode (200×200 dots per inch resolution); False or 0 indicates that it is in normal mode (100×100 dots per inch resolution). See also the "IsCoversheetFine" property.
IsForwarded	Specifies whether or not the fax was manually forwarded. True or 1 indicates that the fax was forwarded. False or 0 indicates that the fax was not forwarded. Use the "ForwardToUsers" method to specify manual forwarding.
IsGatewayGenerated	Specifies whether or not the fax was generated by the RightFax e-mail gateway. True or 1 indicates that the fax was generated by an e-mail gateway. False or 0 indicates that it was not.
IsGenericFlag1On	Specifies whether or not the user customizable API flag Generic1 is on.
IsGenericFlag2On	Specifies whether or not the user customizable API flag Generic2 is on.
IsHeld	Specifies whether or not the fax is being held for preview before being sent by the user. True or 1 indicates that the fax is held for preview. False or 0 indicates that it is not. Chapter 4 Fax Objects and Attachments 43
IsInDelaySend	Specifies whether or not the fax is being held until the date and time specified by the "DelayFaxSendDateTime" property. True or 1 indicates that the fax is awaiting the specified time. False or 0 indicates that it is not.
IsInitialized	Specifies whether or not the fax was initialized. True or 1 indicates that the fax was initialized. False or 0 indicates that the fax was not initialized.
IsINLJob	Specifies whether or not the fax is an INL job.
IsLCRTimeDelayed	Specifies whether or not the fax was delayed because of a least-cost routing rule. True or 1 indicates that the fax was delayed. False or 0 indicates that the fax was not delayed.
IsNeedingApproval	Specifies whether or not the fax is being held until it is approved. True or 1 indicates that the fax is awaiting approval. False or 0 indicates that it is not. Use the "Approve" method to send the fax.
IsPrinted	Specifies whether or not the fax was successfully printed. True or 1 indicates that the fax was printed. False or 0 indicates that the fax was not printed. See also the "PrintFax" method.
IsProductionFax	Specifies whether or not the fax was generated by the RightFax Production Module
IsReceived	Specifies whether the fax is an incoming or outgoing fax. True or 1 indicates that the fax was received (incoming). False or 0 indicates that the fax was sent (outgoing).

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IsViewed	Specifies whether or not the fax was viewed. True or 1 indicates that the fax was viewed. False or 0 indicates that the fax was not viewed.
LastHistoryChangeDateTime	This returns the date and time that the most recent history element was added to this fax. It is updated every time an element is added to any of the fax history objects.
MaximumRetries	This property specifies the maximum number of times the system should attempt to deliver the fax if the phone number is not responding. If this is set to 1, the system will stop after the first failed attempt. Set this to zero (0) to use the default setting on the RightFax server. Use the "TryInterval" property to specify the length of time between retries.
NeedsPDFConversion	Indicates whether or not the fax needs to be scanned for embedded codes before conversion.
NeedsPrescan	Indicates whether or not the fax requires PDF conversion. When PDF conversion is complete, this property is automatically set to False or 0.
OriginalBFTFilename	Returns the name of the binary file transfer file before it was renamed by the fax server. Binary file transfers have been replaced by the fax image attachment, but this property remains available for backwards compatibility.
OriginalFCSFilename	Returns the name of the original file that was converted to use as the fax cover sheet. This is the name as it appears in the server folder. The converted file name is accessible through the "FCSFilename" property.
Priority	Sets the priority for the fax using one of the valid FaxPriorityType enumerated values from the following table. Note that in order for the user to send a fax with High priority, the "IsAbleToUseHighPriority" property must be set to set to True or 1 and the "HighestAvailablePriority" property must be set to fpHigh in the "User" object.
SecureCSID	Returns the secure caller subscriber identification of the sender's fax machine, if any. This applies only to received faxes.
SendTime	Returns the total length of transmission time it took to send or receive the fax. This is available for all received faxes. It is only available for sent faxes after successful completion.
ToCityState	Specifies the city and state of the recipient..
TotalLinkCount	Returns the total number of links associated with this fax. Links are generated when a RightFax user sends or forwards a fax to another RightFax user. Rather than duplicate the image file of the fax for each user, the system creates a link to a single instance of the image.
TotalPages	Returns the total number of pages in the fax. The fax must be converted for this to be valid.
ToVoiceNumber	Specifies the telephone number of the recipient.
TryInterval	Specifies how long to wait, in seconds, between attempts to send the fax. The "MaximumRetries" property must be set to greater than 0 for this to have any effect.

TypeOfPrintJob	Specifies the type of data in the print job.
UserComments	Comment text added to the fax by the fax sender.

Log Files

By default, the IQ service logs (IQ Application, IQFolder, IQocr, ServiceHost, etc) and Add-on logs are located here on the IQ Server: *C:\WINDOWS\Temp\Informa Software\Logfiles*.
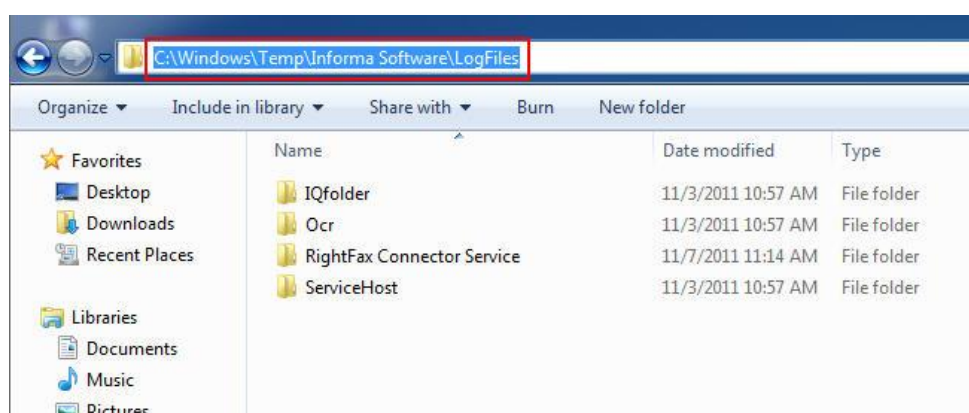
The IQ client logs are stored in the following location on the client machines: *%temp%\Informa Software\LogFiles*.
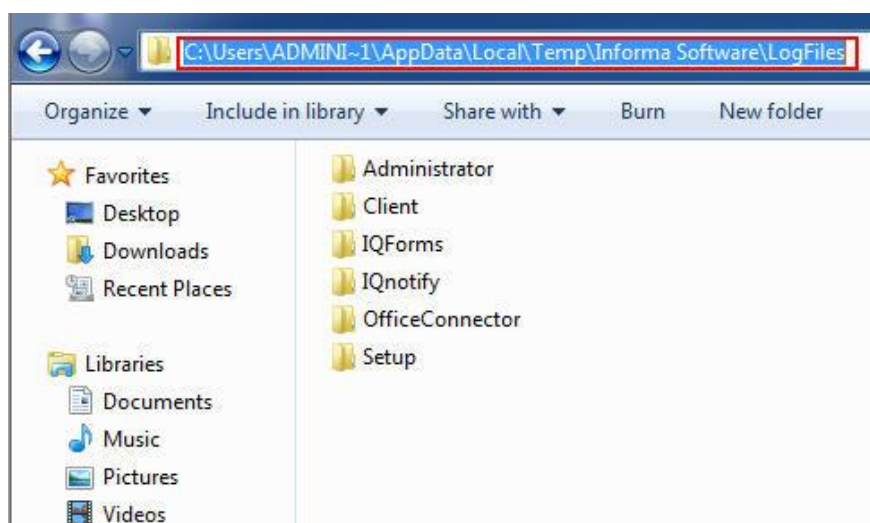
Note: The AppData folder is a protected operating system folder and is hidden by default.

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