

User's Guide

Version 15.0



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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. Thank you for using ImageQuest and please share your ideas on how we can make ImageQuest better for everyone.

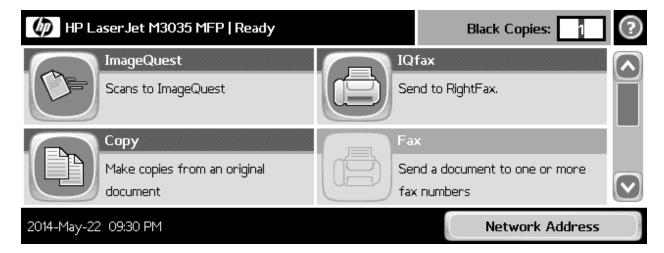
Please contact us below for technical support and/or troubleshooting:

Toll Free: (877) 475-7778 Outside US: (407) 215-1291 Email: <u>support@informasoftware.com</u> Website: <u>http://www.informasoftware.com</u>

# Scanning with ImageQuest (OXPd)

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

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



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

Scan to ImageQuest	?
User:	
abaker	]
More Options	

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

User		?
User		
User  abaker  Administrator		
jsmith		
🔘 kthomas		
	ОК	Cancel

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

User		2
User		
🔘 abaker		
User  abaker  Administrator  ismith  kthomas		
<ul> <li>jsmith</li> </ul>		
🔘 kthomas		
	ОК	Cancel

The screen should then change to reflect the new username:

🙆 💿 Scan to ImageQuest		0
User:		
jsmith		
		+
	More Options	

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

Cancel Job 🕥 Start Scan	1		?
Original Sides 1-sided		Content Orientation Portrait	
Resolution 300 dpi	Page 2	Original Size Letter 8.5"x11"	B
Color/Black Black/White scan	of 2	Job Build On	E
	$\mathbf{v}$		

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

Scanning Job Build Segment... Press "Cancel Job" to cancel entire job. Cancel Job

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

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

 Place originals on glass or in document feeder. Touch "Scan" to scan each job segment.

 After last segment has been scanned, touch "Finish" to process entire job.

 Finish
 Scan
 Cancel Job

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

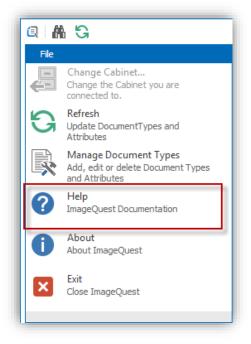
# IQdesktop

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

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

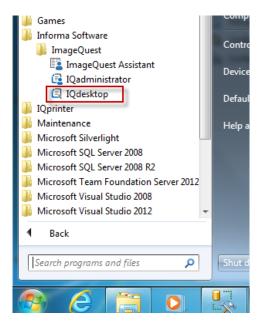
#### **Online Help Documentation**

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



### Launching IQdesktop

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



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

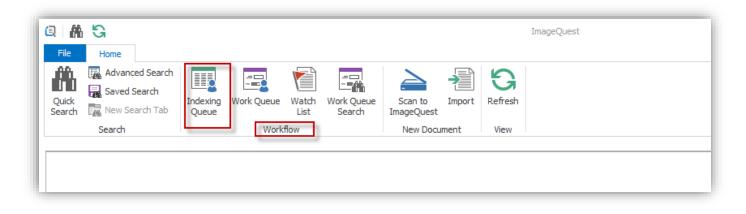
The screenshot below shows the default view of the Home ribbon, which contains access to IQdesktop's major features in the "Search", "Work Flow", "New Document" and "View" ribbon groups.

a A S	ImageQuest	₫ - □	
File Home Advanced Search Quick Saved Search	ImagQuet		×
Cabinet: ImageQuest User: demo	Server: example-server.informa.local		.đ

### Indexing Indexing Queue

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

To view the Document Indexing screen, in the "Home" tab, locate the "Workflow" ribbon group and click "Indexing Queue" button as highlighted below.



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

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

Index Reas	-	Print	Print Best Fit					Preview Pane		
	Batch					Grid			Preview	~
Indexing Que	ue te X									-
Create Dat 11/18/201	Page Count 2	Document MFP Scan	Indexing R Administrat	Locked	Mfp Input	Mfp Address	Mfp Display	Mfp Host N	Mfp Serial	
			-							
11/18/201	4	MFP Scan	Administrat							
11/18/201	8	MFP Scan	Administrat							
11/18/201	8	MFP Scan	Administrat							

File H				110	lexing Queue - I	anagequest					<u>^</u>	
Index Reas	ssign Delete Batch	Print	Inverse Pr	int Best Fit Columns	C Find Pane	er Row 📃 Ex	ear Grouping (pand All Groups pillapse All Group: I	Customize	Ref	resh natically	Previe Pane Previe	
Indexing Que	eue 🖶 🗙								1			
Drag a column	header here to	group by that	column							Pre	view	
Create Dat	Page Count	Document	Indexing R	Locked	Mfp Input	Mfp Address	Mfp Display	Mfp Host N	Mfp S	Page	< >	
11/18/201	2	MFP Scan	Administrat									
11/18/201	4	MFP Scan	Administrat								motext	informo
	8	MFP Scan	Administrat									
11/18/201											Table 200	1
	8	MFP Scan	Administrat								AND DOUBLE AND	10.00
11/18/201	8	MFP Scan	Administrat						>		NAME         NAME         NAME           NAME         NAME         NAME	NM         N           01         01           01         01           01         01           01         01           01         01           01         01           01         01           01         01           01         01           01         01           02         01           03         01           04         01           05         01           06         02           07         02

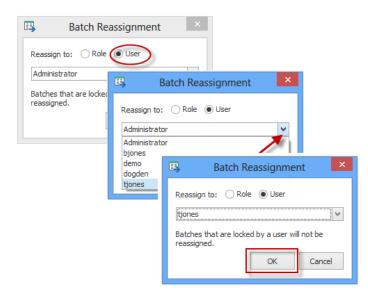
#### Note: Batches may be previewed by opening the Preview Pane using the button shown below.

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

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

Q A S		Inde	exing Queue - Ir	mageQuest					Ť	-		×
File Home Indexing												
Index Reassign Delete Print	Print E	<b>← →</b> Best Fit Columns	Image: Prince Panel         Image: Panel         Iman	Row 📃 Ex	ear Grouping pand All Groups ollapse All Groups	Customize		G resh atically		Preview Pane		
Batch	Select			Grid						Preview		^
Indexing Queue 🛛 🖨 🗙												-
Drag a column header here to group by	that column							Prev	view			
Create Dat Page Count Docume	~	d	Mfp Input	Mfp Address	Mfp Display	Mfp Host N	Mfp S	Page:	<	>		
11/18/201         2         MFP Sca           11/18/201         4         MFP											toño	Ŧ
11/18/201 8 MFF	Reassign Ctrl+Alt+R									iliz Kitar	1	
11/18/201 8 MFF								L				
<							>			:	11 12	
Cabinet: RangerCheers User: mklingb	erg Server: intern3.informa	i.local R	eady.						Т	otal ite	ms: 4	

In the "Batch Reassignment" window below, use the drop-down menu to select the User or Role to reassign the selected batch to as demonstrated and click "OK". Alternatively, the reassignment button may be used under the "Batch" ribbon group.



By reassigning the batch to a role, every member in that role has access to the document batch in their Indexing Queue. By reassigning to a user, only that specific user has access to the document batch. Once a user opens a

batch, it will be locked for exclusive use for thirty minutes. If the indexing process takes longer than this, the lock will be expired and the batch will once again become available for indexing to other users in that role. Once a batch is indexed by a user, it is no longer available for indexing by any user.

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

Q AA 😋	i										
File He	ome Indexi	ng									
Index Reas	<b>- ^</b>	Print	All Inverse None Select	Pri Gr		l← → Best Fit Columns	۲ ا	ind Pan Auto Filt Group By	er Row		
Indexing Que	eue 😑 🗙	group by that o	olumn						_		
Create Dat	Page Count	Document	Indexi	ng R	Locke	ed	Mfp Ir	nput	Mfp		
11/18/201	2	MFP Scan	Admini	etrat							
11/18/201	4	MFP Scan	" 😱	Index		Ctr	' <b> </b> +	1			
11/18/201	8	MFP Scan	I,	Reassig	jn	Ctrl+Alt	+R				
11/18/201	8	MFP Scan		Delete		Ctrl+Alt	+D				
				Print				1			
						C	Confir	matic	n		X
_	-	-		<u>^</u>		ou have o re you su				tches.	
								Yes		No	

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

## **Indexing and Committing Batches**

Document batches are "time-stamped" with the specific time they were scanned.

To index one of the batches, highlight the batch and select **Index** from the "Batch" ribbon group, double-click the batch, or right-click the batch and select **Index**.

Index Reas		Print		nverse		Print Grid	l← → Best Fit Columns	E Find Pane Auto Filte	r Row
Indexing Que	eue 😑 🗙	aroup by t	hat co	lump					
Create Dat	Page Count	Document	I	Indexing				Mfp Input	Mfp A
11/21/201 11/21/201 11/21/201	4	MFP Scan MFP Scan MFP Scan	ŀ	Admini		Index Reass		Ctrl+I trl+Alt+R	
11/21/201111		rin ocur			^	Delete Print	e Ct	rl+Alt+D	

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

The Indexer screen allows a user to view the individual pages of the batch and to designate pages as the beginning of documents for indexing. See below to locate the "**Pages**" pane and the options for adjusting the view and adding annotations.

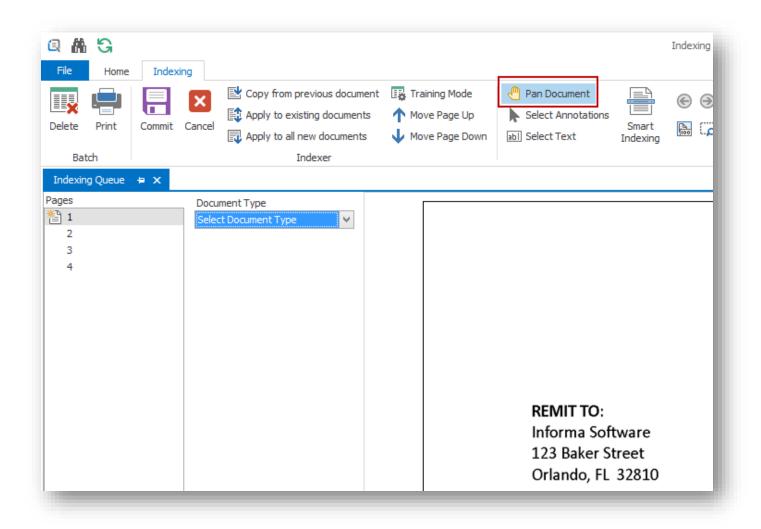
	Indexing Queue - ImageQuest	<b>•</b>	- □	×
File       Home       Indexing         Image: Commit Commit Control       Image: Commit Control       Image: Commit Control       Image: Commit Control         Delete       Print       Commit Control       Control       Image: Control       Image: Control         Batch       Indexer       Indexer	No Select Annotations Zoom: V A Text Box Rectangle Arrow	A <u></u>		~
Indexing Queue       Image: X         Pages       Document Type         1       Select Document Type         2       3         4       Route To:         Image:	<section-header><section-header><text><text><text><text><text><text></text></text></text></text></text></text></section-header></section-header>			
Cancel Commit	al Documents: 0			۲ ::

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

The "Zoom" features make the image larger or smaller in the document window. The user has options to Fit Entire Page, Fit Width, Fit Height, Actual Size (100%), Marquee Zoom, Zoom In, Zoom Out, and Zoom Percentage.

	Indexing Queue - ImageQuest	
File     Home     Indexing       Image: Second se	• Pan Document           • Select Annotations           • Smart           • Smart           • Commands	
-		
Pages Document Type       1     Select Document Type       2     3       4     Select Tocument Type       8     Route To:       8     Select Tocument Type	INVOIR INCOMENTIAL AND A COMPACT OF A COMPAC	
Cabinet: RangerCheers User: mklingberg Server: intern3.informa.l	cal Documents: 0	× >

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



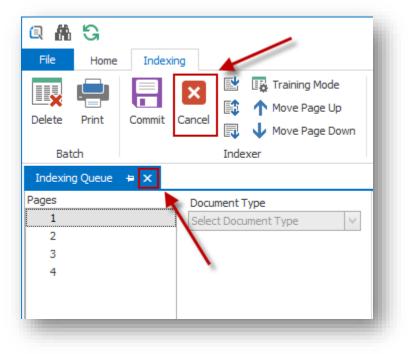
Click the **Rotate Left** and **Rotate Right** buttons rotate the image as displayed on the following page. This rotation will persist when the page is saved in ImageQuest.

1       2         3       1             1       2             1       2             1       2             1       2             1       2             1       2             1       2             1       2             1       2             1       2             1       2             1       2             1       2             1       2             1       2             1       2             1       1             1       1             1       1             1       1             1       1             1       1             1	Q # G	\$	Indexing Queue - ImageQuest	⊡ – ⊡ ×
Page     Document Type       1     2       3     Belet Document Type       1     1       1     1       2     3         NOUR     Information       1     1         Nour     Information       1     1         Nour     Information         Nour         Nour	Delete Print Commit	Cancel	Select Annotations     Smart     Zoom:       Bill Select Text     Indexing     Indexing	✓     Image: Imag
Cancel Commit Commit	Pages 1 2 3	Select Document Type        Route To:        Message:     ^		A     A
Cabinet: RangerCheers User: mklingberg Server: intern3.informa.local Documents: 0	Cabinet: RangerCheers User			

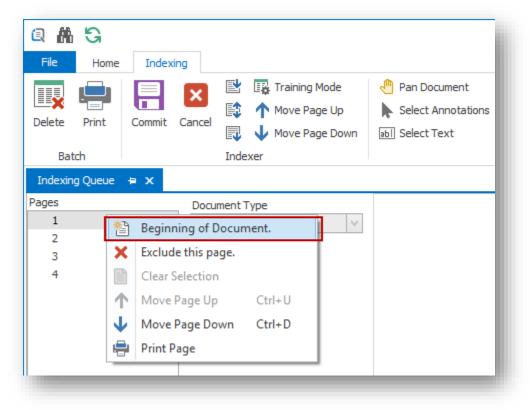
Note: If Full-Text OCR is enabled, it is possible for a manually-rotated page will be re-orientated by the OCR engine in order to read the text. Whether this re-orientation persists can be configured in IQadministrator.

The other options in the ribbon will be explained later in this document. For information on Annotations, see the **PDF Annotation** section. Note: both PDFs and TIFs can be annotated from the Indexer.

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

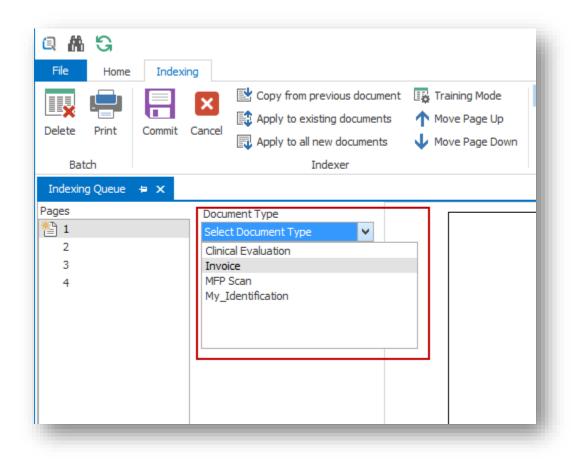


To begin indexing the documents in the batch, designate the first page of the first document by selecting it using the **<SPACEBAR>.** The real icon will appear to the left of the page number indicating that the page is the beginning of the document. The user may also designate the first page by right-clicking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



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

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



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

Delete Print Commit	Image: Copy from previous document       Image: Training Mode         Image: Copy from previous documents       Move Page Up         Image: Copy from previous documents       Move Page Up         Image: Copy from previous documents       Move Page Down
Batch	Indexer
Indexing Queue 🛛 🖨 🗙	
ages	Document Type
1 - Invoice	Invoice
3	Vendor Name
4	
	Vendor Id
	Invoice Date
	Invoice Amount
	City and State
	V 5
	Invoice Number
	Account Number
	Description
	5
	GLCode
	5
	InvoiceBoolean
	Invoice Number INT
	Route To:
	Nerrora Alexandria
	Message:
	~
	Cancel Commit

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

es	Document Type
1 - Invoice	Invoice
2	Vendor Name
3	5
4	
	Vendor Id
	Invoice Date
	~
	Invoice Amount
	City and State
	Invoice Number
	C+
	Account Number
	Description
	C
	GLCode
	5
	×
	Route To:
	✓ 5
	Administrator (User)
	Manager One/manager (User) Manager Two/manager2 (User)
	Student One/student (User)
	Student Two/student2 (User)
	Tom Jones/tjones (User) Approval (Role)

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

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

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

Q 🛗 Ġ	
File Home	Indexing
Delete Print Batch	Commit Cancel Copy from previous document Training Mc Commit Cancel Apply to existing documents Move Page Apply to all new documents Move Page Indexer
Indexing Queue	₩ X
Pages          1 - Invoice         2         3         4	Document Type Invoice Invoice DocumentGroup Atlanta Orlando Phoenix Invoice Date Invoice Amount City and State

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

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

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

Q 🛗 😘		
File Home	Indexing	
		📑 Copy from previous document 🛛 🗛 Trainir
	<u> </u>	🚺 🚉 Apply to existing documents 🛛 👖 Move
Delete Print	Commit Canc	Apply to all new documents 🛛 🕹 Move
Batch		Indexer
Indexing Queue	÷ ×	
Pages	Do	cument Type
1 - Invoice	In	voice
2	Do	cumentGroup 🔨
ži 4	At	lanta 🗸 🗸
	Ve	ndor Name
	GE	Graphics 5
	Ve	ndor Id
	44	12 5
	In	voice Date
	11	/23/2015 🗸
	In	voice Amount
		32.50 5

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

Indexing Queue 🛛 🖨 🗙	
Pages	Document Type
🎦 1 - Invoice	Invoice 🗸
2	DocumentGroup
3	Orlando 🗸 🕤
🎦 4 - Invoice	
	Vendor Name
	New Vendor 5
	Vendor Id
	4445 5
	Invoice Date
	10/23/2015

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

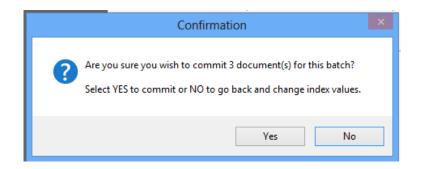
Amount	
\$396.00	÷

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

Invoice       Invoice       Invoice       Invoice         2       DocumentGroup       Invoice       Invoice         Atlanta       1       Invoice       Invoice         Vendor Name       GB Graphics       Invoice       Invoice         Vendor Id       10       Invoice       Invoice         Invoice Date       Invoice Date       Invoice Amount       Invoice         Invoice Nume       Invoice Nume       Invoice       Invoice         It could be on the one one one one one one one one one on	Stamp O Ellipse 2 Ink Pen Annotation Tools
Pages     Document Type       I1-Invoice     Invoice       2     DocumentGroup       4     Attanta       Vendor Name       GB Graphics       Vendor Id       4112       Invoice Date       I1/I23/2015       Invoice Amount       §832.50       City and State       Orlando Vilorida     v s       Invoice Number	INFORMATION STATE
Account Number	

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

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



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

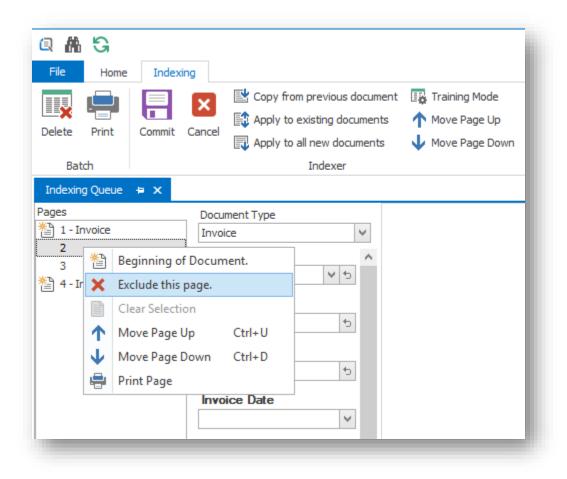
ing				
Cancel Copy from previous document Tra				
Indexer				
Document Type Invoice DocumentGroup Atlanta Vendor Name				
Vendor Name GB Graphics				

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

Once a batch is committed, the user will return to the Indexing Queue so they may continue indexing remaining batches as needed.

## Page Features in the Indexing Queue

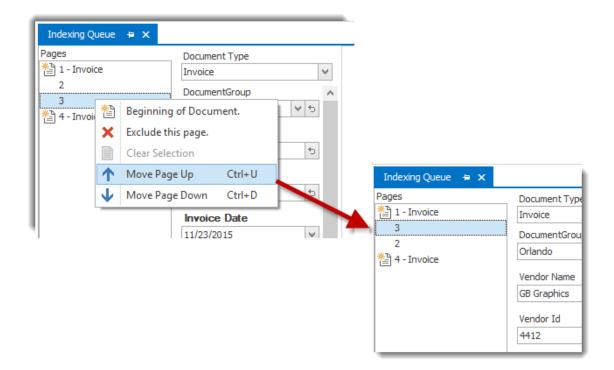
In the Pages section of the indexing screen, the available options on the right-click menu are **Beginning of Document**, **Exclude this Page**, **Move Page Up**, **Move Page Down**, **Clear Selection**, and **Print Page**. See below. You can exclude a page from a batch by highlighting and right-clicking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



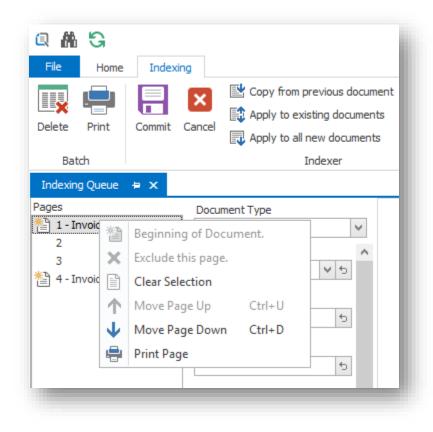
For example, as shown below, Page 2 has been excluded. When this batch is committed, we will have two documents in ImageQuest: one, two-page "Invoice" document consisting of Pages 1 and 3 and one, single-page "Invoice" document consisting of Page 4.

Q 🗰 🕄		
File Home	Indexing	
Delete Print	Commit Cancel	Copy from previous document Apply to existing documents Apply to all new documents
Batch		Indexer
Indexing Queue	⊭ ×	
Pages 1 - Invoice 2 3 4 - Invoice	Invo Docu Atla Veno	umentGroup

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



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



**Print Page** is used to print a single page of the document. If annotations have been added to the document, a prompt will appear asking if you would like to print with or without the added annotations. Clicking the print button in the ribbon bar will bring up a prompt to print the whole batch. When printing the whole batch, added annotations are not included.

E A C	me Indexing		Indexing Queue - ImageQuest
Delete Print Batch	Commit Cancel		Pan Document Select Annotations abj Select Text Commands
Pages 1 - Invoice 2 3 4	Document Type         Image: Beginning of Document.         Image: Exclude this page.         Image: Clear Selection         ↑       Move Page Up       Ctrl+U         Image: Wove Page Down       Ctrl+D	<b>~</b> <b>~</b> <b>~</b> <b>5</b>	INVOI
	Print Page Invoice Date 5/12/2007 Invoice Amount	This document ha	nclude Annotations X as annotations. Would you like to include the the document is printed?
	\$832.50 City and State Invoice Number	• •	Yes No Cancel Norman, OK 75432

### **Training Mode**

The **Training Mode** feature allows focus on areas of the image to increase visibility and ease of indexing. You can use this mode to configure the document template for review. To enable this mode, click **Training Mode** button in the "Indexer" ribbon group.

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

R      C     File Home Indexing	Indexing Queue - ImageQuest 🔳 🗖 🗖					
Delete Print Commit Cancel Apply to al Apply to al	n previous document           Image: Second S	Pan Document Select Annotations abi Select Text Inde	art 🖪 🙃 🖨 🖨 📖	125 V AT Text Box	Black Box / Line Rectangle / Arrow Ellipse Ø Ink Pen nnotation Tools	A Ø
Indexing Queue ↓ × Pages 2 3 ↓ - Invoice ↓ - Invoic	sibon		INVOI	CE	<b>inform</b> softwa	
Invoice Amount Save Image Pos City and State Save Image Pos Invoice Number Save Image Pos	siton li 1 Siton C	REMIT TO: Informa Software 123 Baker Street Orlando, FL 32810 BILL TO: GB Graphics		INVOICE NUI INVOICE DAT SHIP TO: GB Graphics		107
Account Number Route To: Message:		P.O. Bo	k 102332 a, OK 75432	345 Oak Parkway Stillwater, OK 75622 Quantity		Total
Cabinet: ImageQuest User: Administrator Server: in	Commit <	G802 Copy Pa	per – WHT, LTR	10	25.50	255.00

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

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

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

## **IQ Smart Indexer**

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

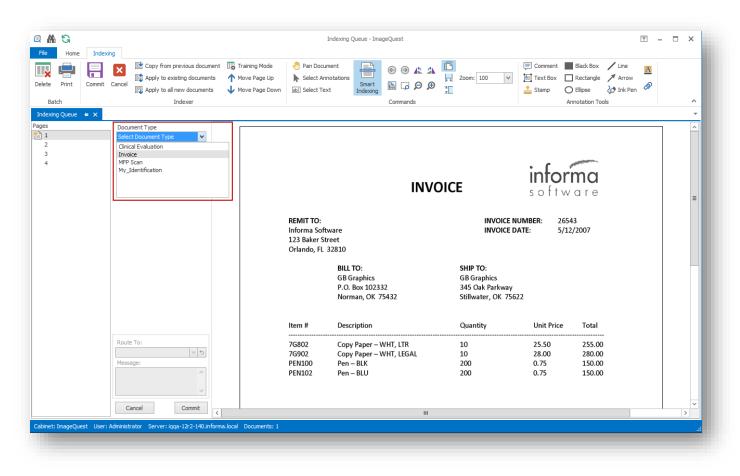
IQ Smart Indexing can be performed on the batch. To begin IQ Smart Indexing, highlight a batch and doubleclick it. This will open the main Indexer screen.

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

Q 🛔 🕄		Indexing Queue - ImageQuest		団 - □ ×
File Home Indexin Delete Print Commit Batch	Copy from previous document Training M	E Up Select Annotations Smart	Image: Construction     Image: Construction       Imag	Black Box / Line Rectangle / Arrow Ellipse / Ink Pen / nnotation Tools
Pages 1 2 3 4	Document Type	IN	voice infor	
		REMIT TO: Informa Software 123 Baker Street Orlando, FL 32810 BILL TO: GB Graphics P.O. Box 102332 Norman, OK 75432	INVOICE NUMBER: 265 INVOICE DATE: 5/13 SHIP TO: GB Graphics 345 Oak Parkway Stillwater, OK 75622	43 2/2007
	Route To: Message:	Item # Description 7G802 Copy Paper – WHT, LTR 7G902 Copy Paper – WHT, LEGAL PEN100 Pen – BLK PEN102 Pen – BLU	Quantity         Unit Price           10         25.50           10         28.00           200         0.75           200         0.75	Total 255.00 280.00 150.00 150.00
Cabinet: ImageQuest User:	Cancel Commit	III	1	

To use IQ Smart Indexing on the documents in the batch, designate the first page of the first document by selecting it using the **<SPACEBAR>**. The <sup>1</sup> icon will appear to the left of the page number indicating that the page is the beginning of the document.

In the "Document Type" drop-down menu, select the document type to designate the first page of the document. For example, as shown on the next page, the first page of the highlighted document is an invoice which means that this page is designated as the first page of the document type, "Invoice".



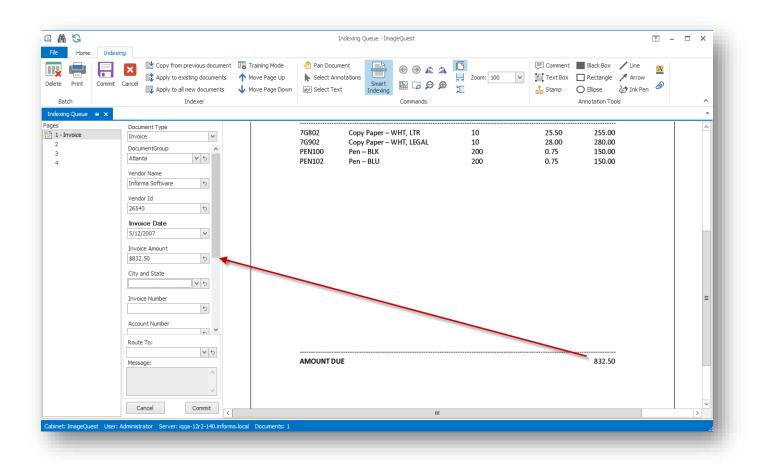
At this time, IQ Smart Indexing can be performed. Tab to the first attribute to be indexed. Next, locate the desired text in the image displayed in the Document window with the mouse cursor. Press and hold the left mouse button and "rubber band" over the text to capture. Release the left mouse button to populate the attribute with the selected text.

In the example below and on the following page, the user is using IQ Smart Indexing to populate the "Vendor Name" attribute with the value "Informa Software" by "rubber banding" over the text on the image in the Document Window.

Indexing Queue 4 × ages Docume 2 Docume 3 A 4 Vendor Vendor Vendor	ntGroup						
	5	REMIT TO: Informa Softw	are	OICE		are B	Ξ
Invoice City and Invoice	Amount to	123 Baker Stre Orlando, FL 37	2810 BILL TO: GB Graphics P.O. Box 102332 Norman, OK 75432	SHIP TO: GB Graphics 345 Oak Parkway Stillwater, OK 756; Ouantity	22 Unit Price	Total	
Route T	0: V D	Item # 7G802 7G902 PEN100 PEN102	Description Copy Paper – WHT, LTR Copy Paper – WHT, LEGAL Pen – BLK Pen – BLU	Quantity 10 10 200 200	25.50 28.00 0.75 0.75	255.00 280.00 150.00 150.00	

File Home Index Delete Print Commit Batch	Capel Copy from previous document	<ul> <li>Invariant Mode</li> <li>↑ Move Page Up</li> <li>↓ Move Page Down</li> </ul>	Indexing Queue - ImageQuest	2 2	Comment Black Box Lin Text Box Cartery Stamp Cartery	том
Indexing Queue in X ages 1 I-Invoice 2 3 4	Document Type Invoice Vocument Group Vendor Name Informa Software Vendor Id Vendor Id Cocument Go Invoice Date Invoice Amount City and State Vendor Id Vendo		REMIT TO: Informa Software 123 Baker Street Orlando, FL 32810 BILL TO: GB Graphics P.O. Box 102332 Norman, OK 75432	NVOICE INVOICE N INVOICE D GB Graphics 345 Oak Parkway Stillwater, OK 756	ATE: 5/12/2007	
	Account Number		Item # Description 76802 Copy Paper – WHT, LTR 76902 Copy Paper – WHT, LEGAL PEN100 Pen – BLK PEN102 Pen – BLU	Quantity 10 10 200 200	Unit Price         Total           25.50         255.00           28.00         280.00           0.75         150.00           0.75         150.00	

IQ Smart Indexing will then auto tab to the next attribute so the user can continue indexing the document. See below. The user has also populated "Invoice Number" with "26543", "Invoice Date" with "5/12/2007", and "Invoice Amount" with "\$832.50".



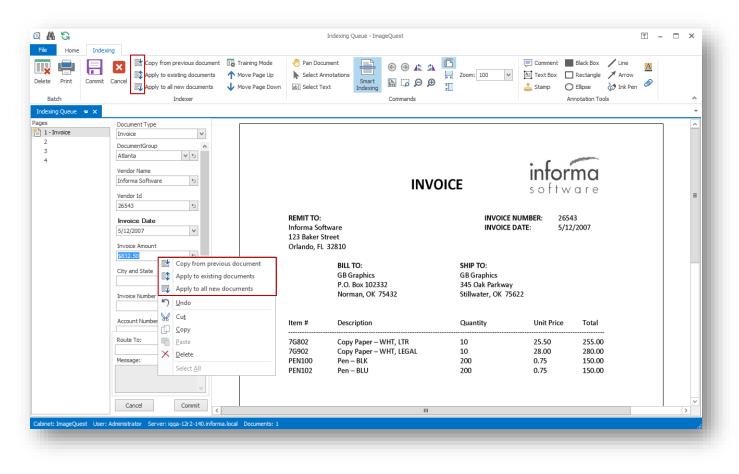
Assign and index additional documents in the batch as needed, and click "Commit" to commit the batch to ImageQuest. Once a batch is committed, the user will return to the Indexing Queue to show the remaining batches to be indexed.

Note: Any combination of IQ Smart Indexing and manual indexing can be performed on the same document.

## Persistent Attributes during Indexing (Sticky Attributes)

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

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

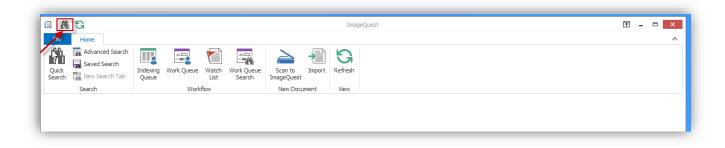


#### **Searching for Documents**

The **Search** ribbon group contains multiple search options: "Quick Search", "Advanced Search" and "Saved Search"; these allow the user to perform a search based on any attribute value, one or more specific Document Types, and/or keywords within indexed documents.

## **Quick Search Tab**

The Quick search can be accessed either by clicking on the the button located in the quick access tool bar or by clicking on the Quick Search button in the **"Search"** ribbon group.



The "Customize" feature allows users to add frequently used search attributes as "favorites" for quick searching. To utilize this feature, click the "Customize" link to open the "Choose Favorite Search Attributes" window.

l 🕅 🕅 File	G							
	Advanced Search	Indexing Queue	Work Queue	List	Work Queue Search	Scan to ImageQuest New Docur	Import	Refresh View
1	Full-Text Search:			Search				×
	Quick Advanced	Saved						5
	DocumentType InvoiceNumber						~	<b>6</b>
								4
	O starter							
	Clear					Search	Cance	el

The user may select as many attributes as needed to be displayed in the tasks pane. The user can then enter or select search criteria and perform their search directly from the search panel as seen below.

Choose Favorite Search Attribute	es 🗙			
Choose frequently-used attributes to appear searches.	for Quick			
Account Number	^			
Amount				
CheckNumber				
City and State				
CreateDateTime				
Date of Invoice				
Description				
DOB	<b>A</b> h	Search		
DocumentGroup	10110	Search		
DocumentType	Full-Text Search			
GLCode				÷
✓ InvoiceNumber Last Name				
MfpAddress	Quick Adv	anced Saved		
MfpDisplayName				
MfpHostName	DocumentType			
MfpInputUser	L			✓ 5
MfpSerial	InvoiceNumber			
				5
Clear OK	-			
	1			
	Customize			
	Clear		Search	Cancel

### Advanced Search Tab

To initiate an advanced search for documents, click on the Advanced Search Button from the "**Search**" ribbon group.

a 🗥 😘							ImageQuest	
File Home								
Advanced Search						<b>-</b>	G	
Quick Search	Queue	Work Queue	Watch List	Work Queue Search	Scan to ImageQuest	Import	Refresh	
Search		Work	flow		New Docu	ment	View	

In the Advanced Search tab shown below, all document types are selected by default, so a user can simply enter or select attribute or keyword information and click "Search" to search all documents that meet the criteria. As shown below, a search is in effect for a Date of Invoice of 10/15/2012.

👬 Search 🗖 >	<
Full-Text Search:	
	5
Quick Advanced Saved	_
Document types to include: All	~
Enter values for any attributes you wish to search for:	
Amount	^
5 to 5	
CheckNumber	
5 or	
CreateDateTime	
Date of Invoice	
10/15/2012 v 🕑 🕁 <sup>to</sup> v 🕑 🕁	
Description	
ه or ه	
DocumentGroup	~
Clear Search Cancel	

Users can specify which document types to include in a search by checking or unchecking document types from the dropdown list. When a selection is made and the user clicks "OK", the Search window will update to only reflect the attributes shared by the selected document types. By selecting a single Document Type, the list of all available attributes is changed to reflect only those attributes associated with that Document Type.

A	Search		×
Full-Text Search:			
			÷
Quick Advanced Sav	ed		
Document types to include:	Invoice		~
Enter values for any attribute	s Check		
Amount			
	MFP Scan		
CheckNumber	_		
CreateDateTime	_		
Date of Invoice	_		
Description	_		
DocumentGroup	Select All Clear	ОК	
Clear	Search	Can	cel

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

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

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

K Search 🗆 🗙	
Full-Text Search:	
	5
Quick Advanced Saved	
Document types to include: Invoice	-
Enter values for any attributes you wish to search for:	
DocumentGroup	<b>`</b>
v रु or v रु	
Atlanta Orlando	Ш
Phoenix &	11
or to	н
Amount to to	
InvoiceNumber	1
Clear Search Cancel	

The custom search results are three Invoices with a Date of Invoice of 10/15/2012. The IQ search criteria are displayed in each Search tab so users can see the search criteria used for the displayed results.

File       Home       Document       Grid         Image: Sector 1	0 #	6 5	<u>,</u>									Imaç	eQuest					ť	<u> </u>	•	×
Wew       Edd Revision       Email Document       Grid Edit       Add to       Add to       Preview       Watch List       Preview       History       Notes       Watch List       Preview       Watch List       Preview       History       Notes       Watch List       Preview       History       Notes       Watch List       Preview       History       Notes       History       Watch List       Preview       History       Notes       History       Notes       History	File	H	Home	Do	cument		Grid														
Search         *         X           DocumentType IN ('Invoice') AND (Date of Invoice = '10/15/2012')		Ed	lit	Add	Revisio	Sa	ve Local	<b>@</b> E	mail Document	Grid Edit	Add to	🖌 Undelet	e Preview	History Notes	Workflow	Active					
DocumentType IN ('Invoice') AND (Date of Invoice = '10/15/2012')           Drag a column header here to group by that column           Image: Space of the state of									Commands					Par	nels						
Drag a column header here to group by that column         X       Image: Solution of the second s	Searc	h ⊭	×																		-
Image: Symplectic sym	Docum	nentT	уре	IN ('Inv	oice') /	ND (D	ate of I	ivoice	= '10/15/2012	.)											
Image: Symplectic sym	Drago	colum	e her	ular have	to orau	e hu th	at column										 	 			
Image: Constraint of the state of		colum			_												 	 			
📔 🔗 🔄 5/15/2014 1 Invoice Orlando 5454 Test Labs 10/15/2012 \$\$0.00	×		6	2	Cre	ateDat	e Pag	eCount	DocumentTyp	DocumentG	InvoiceNum	Vendor	Date of Inv	Amount	Paid						
				9 🛛	5/1	5/2014	F		1 Invoice	Orlando	1234	Big Corp	10/15/2012	\$25.00	<ul><li>✓</li></ul>						
Provide         Provide <t< td=""><th></th><td></td><td></td><td></td><td></td><td>5/2014</td><td>·</td><td></td><td>1 Invoice</td><td>Orlando</td><td>5454</td><td>Test Labs,</td><td>10/15/2012</td><td>\$50.00</td><td><math>\checkmark</math></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>						5/2014	·		1 Invoice	Orlando	5454	Test Labs,	10/15/2012	\$50.00	$\checkmark$						
				9 1	L 5/1	5/2014			3 Invoice	Orlando	7587	Big Corp	10/15/2012	\$835.00	~						
									-				1								

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

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

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

## **Saved Searches Tab**

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

The user may perform a search using the "Saved Searches" method in IQdesktop. Click the saved search icon

. The user can select a saved query from the drop down box.

A	Search		o ×
Full-Text Search:			
			÷
Quick Advanced Saved			
Select a saved query to execute:	Date of Invoice		~
	Choose Paid		
Choose the invoice date:	Date of Invoice	6	
		~	
	:		
Clear		Search	Cancel

The screenshots below give an example of a saved query search based on the "Date of Invoice" attribute and its search result.

- F	йù	Search		□ × □
	Full-Text Search:			5
	Quick Advanced Saved			
	Select a saved query to execute	: Date of Invoice		~
	Enter the Invoice Date:	5/20/2014	~	
- 1	Clear		Search	Cancel
🕄 🛗 🕄 File Home Do	ocument Grid	ImageQuest		团 - □
📄 🦯 📮 Ann	otate Revision Save Local @ Email Document 🛱 Find			
Date of Invoice 😐 🗙 Date of Invoice = '05/2	0/2014			
Drag a column header here				
× 🖹 🔗 🗈	CreateDate PageCount DocumentT Docum	entG InvoiceNum Vendor Date of Inv Amount o 7898 sample invoice 5/20/2014 \$	Paid	

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

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

### **Full-Text Search**

Full-Text searches are available in the Search dialog box, regardless of the active search tab. Most common file types such as .txt, .doc, .pdf, and .xls documents are available for Full-Text search; the search results will include all documents that contain the keyword criteria entered.

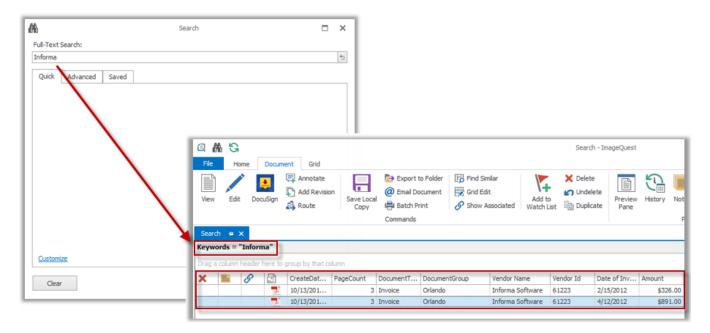
See below for search string examples and descriptions of valid Full-Text search syntax.

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

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

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

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



# **Viewing a Document**

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

	63	<b>a</b>											Imag	jeQuest	
File	- F	Home	Docur	ment Grid	l										
Quick Guick		Advance Saved Se New Sea	earch		Work Queue	Watch V	Work Queue Search	Scar Image		G Refresh	Default Panel Layout				
		Search			Workf			-	v Document		View				
Searc	h ⊧∍														
Docur	nentT	ype IN (	Invoice	e') AND (Date	of Invoice =	: '10/15/2	2012')								
)rag a	colum	n header	here to r	group by that o	olump										
X		S		CreateDate	1	Documer	ntT Docu	mentG	InvoiceNum	Vendor	Date of Inv	Amoun	t.	Paid	
•	-	6		5/15/2014	-	1 Invoice	Orlar			Big Corp	10/15/2012		\$25.00		
		S		5/15/2014		1 Invoice	Orlar				10/15/2012		\$50.00		1
												Ę.	Anno	tate	
													Add Route Save Export Emai Batch	Revision	Ctrl+Shift+L Ctrl+M
Hist	tory	Sho	w Detail	15								↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	Add Route Save Expo Emai Batch Find Grid I Show Add 1 Delet	Revision e Local Copy rt to Folder I Document n Print Similar Edit v Associated to Watch List re	

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

14				Invoice 44	142232 (Revi	sion 1).pdf - Adobe Reader		- 🗆 ×
	Edit View							*
<b>I</b>	🔁 📝			1 / 3	75.7	* 🖬 🗄 🕼 👂 🍢		Tools Sign Comment
							^	Sign In
							- 1	▼ Export PDF
Ø		Informa Software	9		PU	RCHASE ORDER		Adobe ExportPDF (2) Convert PDF files to Word or Excel online.
		Purchase Order No: AD3224						Select PDF File:
		Purchase Order Date: 11/30/200 Terms: Net 30 Ship Via: Delivery	8				- I	Invoice 4442232 (Revision 1).pdf
		Bill To: Informa Software		Ship To: Informa			- 1	1 file / 134 KB
		2300 Maitland Center Parkway Suite 220			itland Center Parkway			Convert To: Microsoft Word (*.docx)
		Maitland, FL 32751			, FL 32751		- 1	Microsoft Word (*.docx)
		Product Number	Product Description	Order Qty.	Unit Price	Ext. Price		Recognize Text in English(U.S.) Change
		PEN3456-B	Ball point pen, Black	200	2.35	70.00	I	
		PAD8733-Y	Legal pad, Yellow	25	1.25	31.25		Convert
		DVD4211	DVD 10 Pack	4	25.95	103.80		
								Create PDF
								▶ Send Files
						APPROVED		▶ Store Files
		Notes:						
		Please ship by 12/1/20	08.				I	
							¥	

## **Configuring the View**

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

IQdesktop is comprised of three main areas by default, the ribbon area at the top of the screen, the grid area in the middle, and the Notes/History/Workflow History/Action Work Items panels at the bottom as shown below.

This screen can be customized in a variety of ways.

	1 <b>G</b>							ImageQuest						<u></u>		x
File	Home	Docu	ment Grid	1												
Quick	Advance	Search		Work Queue	Watch Work (	Queue Scar			Default							
Search	New Se	arch Tab	Queue		List Sea		-		anel Layout				-	_		
_	Search			Workfl	ow	Ner	w Document	Vi	ew							
	ı + X															*
Docum	entType IN	('Invoic	e') AND (Crea	teDateTime	= '5/15/2014')											
Drag a	column header	here to	group by that o	olumn												
x	<b>i</b> 8		CreateDate	PageCount	DocumentT	DocumentG	Amount	Date of Inv	InvoiceNum	Paid	V	endor				
	6		5/15/2014		1 Invoice	Orlando	\$25.00	10/15/2012	1234		И В	ig Corp				_
	<b>B</b>		5/15/2014		1 Invoice	Orlando	\$50.00	10/15/2012	5454		Z T	est Labs,				
	8	1	5/15/2014		3 Invoice	Orlando	\$835.00	10/15/2012	7587		✓ B	ig Corp				
Histo	ory														цг з	ĸ
<b>e</b>	🐻 👷 Sh	ow Detai	ls													
Action					Event	Date						Name				$\wedge$
FileViev	N				5/20/2	2014 9:19:57 AM	4				demo					
Note					5/16/2	2014 11:28:25 A	M				demo		-	_		
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Delete						2014 10:24:35 A					demo		_			
Save			Natura I 🗖			2014 10:24:35 A	M				demo					*
1 1 A	Active Work Ite	ems	Notes 🤤	Workflow His	tory 🔓 Hist	ory										

To increase screen "real estate", locate the pushpin icons on the "History", "Workflow History", "Active work items" and "Notes" panels as highlighted below. Unpinning the panels causes them to slide out of the way. To access the hidden panels, simply hover over the tabs. Click the pushpin again to allow the panels to always be shown on the screen. The panels may also be closed altogether by clicking on the **X** to the right of the pushpin.

Action	Event Date	✓ User Name	
SaveLocal	5/19/2014 12:46:47 PM	demo	
FileView	5/19/2014 12:46:47 PM	demo	
Save	5/16/2014 1:35:01 PM	System	
Save	5/16/2014 1:35:01 PM	demo	

Another way to adjust the screen "real estate" is by moving the mouse cursor between two panels until the cursor shows up. Once the cursor changes to the double arrow click and drag the cursor to expand the panel as shown below.

a i <b>m</b> . 13	ImageQuest	Ē - □ ×
File Home Document Grid		^
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View Edit Save Local Copy 🖶 Batch Print 🔗 Show	Add to Preview History Notes Workflow Active Associated Watch List Pane History Work Items	
Commands	Panels	
Search 🖡 🗙		
DocumentType IN ('Invoice') AND (CreateDateTime = '5/15/2014')		
Drag a column header here to group by that column		
	ntG InvoiceNum Vendor Date of Inv Amount Paid	
Ø         S         5/15/2014         1         Invoice         Orlando           Ø         S         5/15/2014         1         Invoice         Orlando		
Ø         5/15/2014         1         Invoice         Orlando           Ø         5/15/2014         3         Invoice         0	5454 TestLabs, 10/15/2012 \$50.00	
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History		# ×
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Action	Event Date 👻 User Name	,
FileView	5/15/2014 12:04:58 PM demo	
Save	5/15/2014 12:04:27 PM System	
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Save	5/15/2014 12:04:03 PM demo	
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6	5/15/2014	3 Invoice						<b>Z</b>					
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The four panels (History, Workflow History, Active Work Items and Notes) can also be moved around the screen and customized. To move one of the panels, first make sure that the panel is pinned. Next, click and drag the panel tab name to one of the drop position indicators as shown below. Release the mouse button when the panel shadow preview appears in the location you want.

Below,, the "History" panel is moved next to the "Notes" panel.

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	8	1	5/15/2014	3	3 Invoice	Orlando	7587	Big Corp	10/15/2012	\$835.00	<ul> <li>Image: A set of the set of the</li></ul>			
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The result of this move is shown below.

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

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

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#### **Preview Pane**

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

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

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File Home	e D	ocument	Grid											
Quick earch		h Index	ng Work Queue Ie	List Sear	Jueue Scar rch Image	n to Import Quest	Refresh	Default Panel Layout						
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ocumentType	e IN ('Inv	oice') AND (	CreateDateTim	e = '5/15/2014')									Preview	4
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ে 🖺 👌	9 📑	CreateD	te PageCount	DocumentT	DocumentG	InvoiceNum	Vendor	Date of Inv	Amount	Paid			raye i	013 4 2
	8	5/15/201	4	1 Invoice	Orlando	1234	Big Corp	10/15/2012	\$25.00					
		5/15/201		1 Invoice	Orlando	5454	Test Labs,	10/15/2012	\$50.00					
	I.	5/15/201	4	3 Invoice										
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Note: Documents that are larger than 50MB will not show in the preview pane for performance reasons and instead will display a message asking the user to launch the associated application instead.

Note: As of ImageQuest 11.3, the Preview Pane is also available from the Indexing Queue tab. It is disabled

by default and can be turned on/off by using the button in the "Preview" ribbon group

## **Column Customization**

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

CreateDateTime PageCount DocumentType DocumentGroup InvoiceNumber Vendor Date of Invoice Amount Paid
--

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

2 6	63	À										ImageQ	uest	
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					olumn	e = '5/15/	2014') DocumentType	e Docume			umber .	Vendor	Date of Invoice	Amount
Drag a	colum	n header l	here to g	roup by that co	olumn ne 🎙 F			Docume Orlando		AnvoiceNi PateTime		Vendor Big Corp	Date of Invoice 10/15/2012	Amount \$25.0
Drag a	colum	n header l	here to g	roup by that co CreateDateTin	olumn ne 🍷 F 31:16 AM		DocumentType				1284			

The end result is as follows:

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	Search Workflow						New Document	View				
)ocur	nentTy		Invoice	e') AND (Crea	i <b>teDateTime =</b>	'5/15/2014')						
<b>)ocur</b> Drag a	nentTy column	pe IN (	<b>Invoice</b>				CreateDateTime	InvoiceNumber	Vendor	Date of Invoice	Amount	Paid
	nentTy column	r <b>pe IN (</b> '	<b>Invoice</b>	roup by that o	olumn		CreateDateTime 5/15/2014 11:31:16 AM		Vendor Big Corp	Date of Invoice 10/15/2012	Amount \$25.00	Paid
ocur )rag a	nentTy column	r <b>pe IN ('</b> header	<b>Invoice</b> here to g	proup by that o	olumn DocumentType	DocumentGroup		1234		10/15/2012		

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

File	L С.	ome	Docur	nent Grid	ł				ImageQ	uest		
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)ocun		/pe IN ('		group by that o			Curch Data Tara	InvoiceNumber	Vendor	Date of Invoice	Amount	Paid
κ.		6		PageCount	DocumentType 1 Invoice	DocumentGroup * Orlando	5/15/2014 11:31:16 AM		Big Corp	10/15/2012	Amount \$25.00	
		8			1 Invoice	Orlando	5/15/2014 11:32:06 AM		Test Labs,	10/15/2012	\$23.00	
		B			3 Invoice		5/15/2014 12:03:59 PM					~
							Documit Grou	p				

Release the left button to remove the column. The column name is deposited in the "Customize Columns" window, which stores columns that are hidden from the user.

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

		Workflow			New Document		View			
		eDateTime = '5	/15/2014')							
to g	proup by that co	DocumentType	DocumentGroup	2	CreateDateTime	Invo	iceNumber	Vendor	Date of Invoice	Amount
	1	Invoice	Orlando	₽↓	Sort Ascending		1234	Big Corp	10/15/2012	\$
	1	Invoice	Orlando	Z↓	Sort Descending		5454	Test Labs,	10/15/2012	\$
	3	Invoice			Clear Sorting					
					Group By This Colum Hide Group By Box	n				
					Remove This Column	n				
				間	Column Chooser					
				I.	Best Fit 😽					
					Best Fit (all columns)					

The "Customization" window will open. As demonstrated below, drag the column name from the Customization window back to the header row by right-clicking on it, dragging it and releasing it. In the example on the following page, the column, "DocumentGroup", is returned to the header.

		Co	mmands			P	anels		
ivoic	e') AND (Creat	eDateTime =	· '5/15/2014')						
re to	group by that co	olumn		<u>م</u>	_				
]	CreateDate	PageCount	DocumentType	hup Invoid Number	Vendor	Date of Invoice	Amount	Paid	
4	5/15/2014	1		À 📕	Big Corp	10/15/2012	\$25.00	<ul> <li>Image: A start of the start of</li></ul>	
4	5/15/2014	1	Invoice	5454	Test Labs, LLC	10/15/2012	\$50.00		
1	5/15/2014	3	Invoice	7587	Big Corp	10/15/2012	\$835.00	$\checkmark$	
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Detai	ils						cumentGroup		
Detai	ils		Event Date			User Name	cumentGroup		
Detai	ils		Event Date 5/20/2014 9:19:57 AM 5/16/2014 11:28:25 AM		•		cumentGroup		- P

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

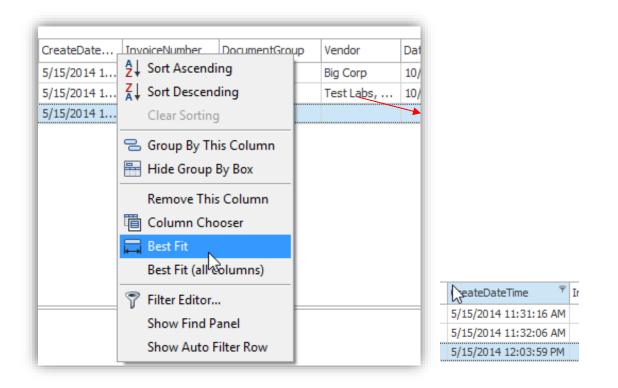
cumentType	CreateDate	ne i	InvoiceNumber	D
voice	5/15/2014 11	31:16 AM	1234	С
voice	5/15/2014 11	32:06 AM	5454	С
voice	5/15/2014 12	03:59 PM		

Here is the CreateDateTime column narrowed:

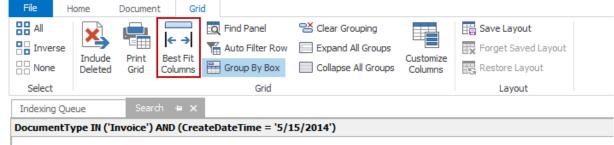
File	Home	Docum	ient Grid	1			
Quick Search	Advand R Saved S	Search	Indexing Queue	Work Queue	Watch List	Work Queu Search	ie Scan ti ImageQu
	Search			Workflo	ow		New [
Search		(1+			15/45	(2014)	
Docum	entType IN	-	<b>') AND (Crea</b>	<b>teDateTime =</b> olumn	= '5/15	/2014')	
Docum	entType IN	-				<b>/2014')</b>	InvoiceNumb
Docum	column header	here to g	roup by that c	olumn	e Cre		InvoiceNumb
Docum	column header	here to g	roup by that o	olumn DocumentTyp	e Cre 5/1	eateDate 15/2014 1 15/2014 1	InvoiceNumb

#### **Best Fit**

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



You may also access this feature in the Grid ribbon as shown below.



Drag a column header here to group by that column

## Sorting

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

Search	л <b>да ў</b>	<										
DocumentType IN ('Invoice') AND (CreateDateTime = '5/15/2014')												
Drag a	Drag a column header here to group by that column											
×		8		PageCount	DocumentType	CreateDateTime	▲ InvoiceN					
		8	<b>(</b>	1	Invoice	5/15/2014 11:31:16	AM					
		8	<b>(</b>	1	Invoice	5/15/2014 11:32:06	AM					
		8		3	Invoice	5/15/2014 12:03:59	PM					
							· ·					

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

## Grouping

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

	ImageQuest
File Home Document Grid	
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Quick Saved Search	Default
	Panel Layout
Search Workflow New Document Vi Search 4 ×	ew
DocumentType IN ('Invoice') AND (CreateDateTime = '5/15/2014')	
Drag a column header here to group by that column	
🗙 📄 🔗 🗊 PageCount DocumentType CreateDateTime 🔺 InvoiceNumber DocumentGr	oup Allower Amount
🔗 🛃 1 Invoice 5/15/2014 11:31:16 AM 1234 Orlando	Z Sort Ascending \$2 Sort Descending \$2
Invoice         5/15/2014 11:32:06 AM         5454 Orlando           Image: State of the state	Clear Sorting \$5
3 Invoice 5/15/2014 12:03:59 PM	Group By This Column
	Hide Group By Box
	Remove This Column
	🛅 Column Chooser
	🛱 Best Fit
	Best Fit (all columns)
	🚏 Filter Editor
History	Show Find Panel
🖶 🚺 🛃 Show Details	Show Auto Filter Row Filter Mode
Action Event Date	- User Name
DocumentGroup 🔺	
	reateDati
DocumentGroup: (Count=1)	
DocumentGroup: Orlando (Count=2)	
- bocamencoroupronando (counc-z)	

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

	G									Image
File	Home Docume	nt Grid	1							
Quick Search	Advanced Search Saved Search New Search Tab	Indexing Queue	Work Queue	Watch List	Work Queue Search	Scan to ImageQuest	- Import	G Refresh	Default Panel Layout	
	Search		Workf	low		New Docu	ment		View	
	entType IN ('Invoice') entGroup ▲ Ÿ	) AND (Crea	teDateTime	= '5/15	/2014')					
×	🖺 🔗 🔄 F	PageCount	DocumentTy	pe Cre	ateDateTime	▲ InvoiceN	lumber	Vendor	Date of In	nvoice
Doci	umentGroup: (Count	=1)	[	Documen	tGr 🔺					
> Docu	umentGroup: Orlando	(Count=2	)		v					

The grid may be fully expanded or fully collapsed using the Expand All Groups and Collapse All Groups buttons on the Grid ribbon or by right-clicking anywhere in the **Group By Box** and selecting the appropriate menu item, as seen on the following page.

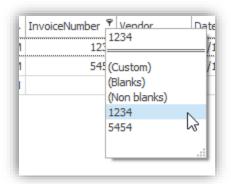
Search 1 × DocumentType IN	('In	voice') AND (Creat	eDate	eTime = '5	/15/2014')					
DocumentGroup	•	E-II E-mand								
DocumentGrou		Full Expand Full Collapse	6	ientType	CreateDateTime	*	InvoiceNumber	Vendor	Date of Invoice	Amount
DocumentGroup		Sort Ascending Sort Descending								
		Clear Sorting Sort by Summary	•							
	8	UnGroup								

Note: To clear the contents of the Group By Box, click Clear Grouping on the Grid ribbon tab or right-click anywhere in the box and select Clear Grouping.

#### **Filters**

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

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



Searc	Search <b>4</b> ×								
Docun	DocumentType IN ('Invoice') AND (CreateDateTime = '5/15/2014')								
Drag a	column h	eader l	nere to g	group by that co	lumn				
×		8		PageCount	DocumentGroup	DocumentType	CreateDateTime	InvoiceNumber 📍	
		8		1	Orlando	Invoice	5/15/2014 11:31:16 AM	1234	
					_				
×v	[Invoice	Numbe	r] = '123	34'					

The bottom of the grid now displays the applied filter, '1234' to the column, "InvoiceNumber", as shown on the previous page. To cancel the filter, simply click on the 🔀 to the left of the filter.

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

More complex or versatile filters may be created by selecting the "Custom" option from the drop-down list. The "Custom" option allows the user to create conditions bound by an "And/Or" clause. When "Custom" is selected, the "Custom AutoFilter" window appears as highlighted below. For example, the user selects "is greater than or 67

equal to" and enters a value of \$15.00 to locate documents that contain Amounts equal to or greater than \$15.00. There are several criteria that can be utilized, which are listed in the drop-down menu (i.e. "equals," "does not equal," "is greater than," etc.). Click "OK" to apply the filter.

Custom AutoFilter ×
Show rows where:
Is greater than or equal to V Field \$15.00
And Or
(Select an operator) V Field (Enter a value)
OK Cancel

Here are the results of the custom AutoFilter:

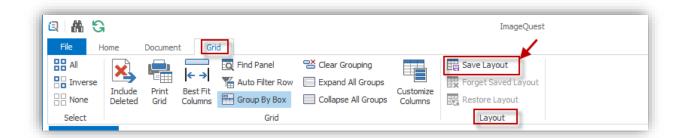
)rag (	a column	header	here to	group by that co	lumn							
ĸ		8		CreateDate	PageCount	DocumentT	DocumentG	InvoiceNum	Vendor	Date of Inv	Amount 🔺 📍	Paid
		8		5/15/2014	1	Invoice	Orlando	1234	Big Corp	10/15/2012	\$25.00	~
		8		5/15/2014	1	Invoice	Orlando	5454	Test Labs,	10/15/2012	\$50.00	~
		8	1	5/15/2014	3	Invoice	Orlando	7587	Big Corp	10/15/2012	\$835.00	~

The "Edit Filter" button can be clicked to edit the current filter as shown below. A filter editor dialog box appears where the user can edit the filter as desired.

	ImageQuest		1	푚 - □ ×
ک 📲 🗧			🖙 Filter Editor 🗙	<u> </u>
	resh Default Panel Layout		And O L [Amount] Is greater than or equal to \$15.00 🖉 😒	
New Document	View	_		
AM' AND CreateDateTin	me <= '5/15/2014 11	.59.5		
G InvoiceNum Vendo	or Date of Inv	Amou		
1234 Big Co	orp 10/15/2012			
5454 Test L	abs, 10/15/2012			
7587 Big Co	orp 10/15/2012			
			OK Cancel Apply	
				Edit Filter

#### **Save Layout**

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



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

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

#### **Updating Documents**

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

#### **Notes**

The **Notes** panel is beneficial to users because it allows for adding comments to a document as illustrated below. For example, the outlined document in this figure has a note. When a note is entered for a specific document,

the icon appears in the Note column next to that document. The **Notes** and **History** tabs are located at the bottom of the screen; click the **Notes** tab to view the notes for the highlighted document. This note, 'Additional services rendered' has been entered on 5/16/2014 at 9:35:14 AM by the User "demo". The **Notes** panel will update automatically as other documents are selected. If the **Notes** panel has been removed from the view, it may be returned by clicking the **Notes** button from the **Document** ribbon tab.

<	8	DocumentGroup	PageCount	DocumentType	CreateDateTime	In
	8		3	Invoice	5/15/2014 12:03:59 PM	-
	8	Orlando	1	Invoice	5/15/2014 11:31:16 AM	
	6	Orlando	1	Invoice	5/15/2014 11:32:06 AM	
Notes						×
					д Add Not	×
		 			Add Not	

Note: Once a note is entered, it cannot be updated or changed. Notes cannot be searched. The "Update Document" permission is required for individual users to add notes.

#### **Edit a Document**

To edit a document, right-click on the highlighted document and select **Edit** from the drop-down menu as demonstrated below. You may also click on the Edit button  $\checkmark$  from the Document ribbon tab.

		i ,				ImageQuest									
File /iew	Edi	<b>P</b>	Annota		i Export t @ Email Do i Email Do i Email Do	int 🔗	Find Similar Grid Edit Show Associated	Add to Watch L		Preview	,,		Activ Vork It		
lear	h a	×			Comm	ands					Pane	S			
			Invoid	e') AND (CreateDa	ateTime = '5/	/15/2014')									
rag a	colum	n header	here to	group by that colum	n										
<b>(</b>		8		DocumentGroup	PageCount	DocumentType	CreateDateTir	ne	InvoiceNumber	Vendor	Date of Invoice	Amount	.▲ P	aid	
		8			:	3 Invoice	5/15/2014 12	:03:59 PM						~	
		8		Orlando		1 Invoice	5/15/2014 11			Big Corp	10/15/2012		5.00	~	
		I		Orlando		1 Invoice	5/15/2014 11	:32:06 AM	5454	Test Labs	10/15/2012 View	¢5i Ctrl+		<b>~</b>	
											Edit	Ctrl+Shift+	_		
											Annotate	Curtonint			
											Add Revision				
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											Save Local Copy	Ctrl+Shift+			
											Export to Folder				
										@	Email Document	Ctrl+N	1		
Not	es									÷	Batch Print		_		
	-									Ξρ	Find Similar				
										<b></b>	Grid Edit	Ctrl+	E		
										8	Show Associated	Ctrl+(			
/16/	20149:	35:14 AN	4			demo				<b></b>	Add to Watch List	Ctrl+	г		
		l sevice r		1	-					<b>X</b>	Delete	Ctrl+Alt+I			
	History		Notes	C Workflow Hist	ory 🛛 🙀 Act	ive Work Items				6	Undelete				
A	,														

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

1	Edi	t Docur	nent	-		×	:
Document Type	: Invoice	e					~
DocumentGrou	)						~
Orlando					~	•	
InvoiceNumber							
5454						•	
						_	
Vendor						5	
Test Labs, LLC						0	
Date of Invoice							
10/15/2012					$\sim$	5	
Amount							
\$50.00						ъ	
							¥
Notes Rou	te						
							$\wedge$
							$\sim$
			Save		Car	ncel	

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

	Confirm Document Type Change	
?	Changing the document type of this document will cause all existing data to be lost! Are you sure you want to change the document type?	
	Yes No	

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

To edit multiple documents, right-click on the highlighted documents and select **Edit** from the drop-down. You may also use the **Edit** button on the ribbon.

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

a 🗥 G	ImageQuest	
View Edit Add Revision Save Local @ Email Document	nd Similar nd Edit Add to Watch Lie Multiple Document Edit Multiple Cocument Edit Multiple Cocum	^
Search a × DocumentType IN ('Invoice') AND (CreateDateTime = '5/15/2014') Drag a column header here to group by that column	Check the attributes you wish to update, then enter new values. Unchecked attributes will not be changed.  DocumentGroup None V 5	•
Image: System     Image: System     DocumentGroup     PageCount     DocumentType       Image: System     Image: System     Image: System     Image: System     Image: System       Image: System     Image: System     Image: System     Image: System     Image: System	InvoiceNumber     bice     Amount     Paid       ○ vendor     5/15/2014     ✓     ✓       ○ harount     5/15/2014     ✓     ✓       ○ Amount     5/15/2014     ✓     ✓       ○ Paid     ✓     ✓     ✓	
Notes	Update Cancel	부 × Add Note
5/16/2014 9:35:14 AM     demo       Additional sevice rendered.     Image: Comparison of the second		
Cabinet: ImageQuest User: demo Server: example-server.informa.local		Results: 3 of 3 .::

Note: The Document Type field cannot be changed when using "Multiple Document Edit". This can only be changed for one document at a time.

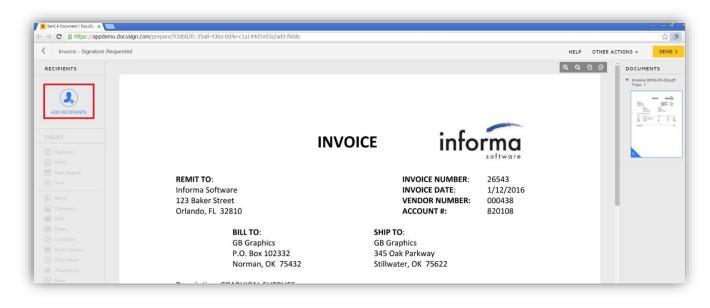
## **DocuSign Connector**

The DocuSign connector allows documents to be sent for digital signature and then automatically saved back to IQ as revisions once they have been signed. Just select the document that needs to be signed and click the DocuSign button in the ribbon.

For information about how DocuSign-originated documents can be saved automatically to IQ as new documents, please contact your administrator.

Ope	n Reas	n Ssign	View	Edit	DocuSi		Revision Save Local	Export to Folde @ Email Documen ₿ Batch Print	Ep Find Similar	d Add to Watch List	X Delete Undelete Duplicate	Preview Histor Pane	ory Notes Wor	kflow Active vory Work Iter	
Wor	Vork Item k Queue	⊭x						Commands					Panels		
Drag	a column	header		group by	/ that colu	Action	Assigned To	Work Item Age	CreateDateTime	PageCount	DocumentType	Vendor Name	Invoice Number	Invoice Date	Invoice
			-	-8			InitialProcessing (Role)		8/7/2015 9:18:48 AM		Invoice		5213	8/7/2015	
		6	1	-==			InitialProcessing (Role) InitialProcessing (Role)		8/7/2015 1:19:41 PM 8/7/2015 1:19:42 PM		Invoice			8/12/2015 8/7/2015	
		8	- Á	-0			InitialProcessing (Role)				Invoice			8/7/2015	
		8	-	-==					8/11/2015 11:53:06 AM		Invoice			8/11/2015	

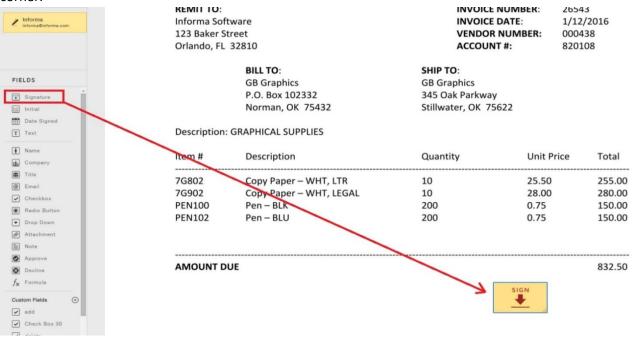
After the DocuSign button is clicked, it will open a web browser that opens to DocuSign page with the document already uploaded. Recipients can be added via the Add Recipients button on the left.



On the Add Recipient screen, a new recipient can be added by inputting an email address and name. Multiple recipients can be added by clicking on "New Recipient" multiple times. If "Sign in Order" is checked, the document must be signed in order defined for the recipients. Click "DONE" once all recipients have been added.

Invoice - Signature Requested		HELP OTHER ACTIONS + SE
ECIPIENTS  ECIPIENTS  Itud S Generation Testing and Te	Edit Recipients Sign in Order Imail Name Name No Info 123 Orla	Add to Sign • ••• ×
	Desc pone	

After recipients are added, click on each recipient and add fields for that recipient, respectively. To add a signature, click on Signature and place the mouse over the area that needs to be signed. Click on the document to place the signature location. Once all fields are complete for all recipients, click "Send" in the top right corner.



Once the document is sent, the recipient will receive an email notification that states a document needs to be signed with a link to the document. After the recipient signs, an email with the signed document is sent to the recipient. If the sender has email notification set up for ImageQuest, the sender of the document will also receive an email notifying the sender that the document has been signed. The sender will be sent a link in the email to view the signed document, which is also saved as a revision in ImageQuest. The history details will also show details on current state of the document and signing activity. If a recipient declines to sign a document, this will also be reflected in the document history and the ImageQuest user will receive an email notification. *Note: The DocuSign Connector requires configuration by an administrator.* 

**Note:** DocuSign documents can also be originated at DocuSign and imported into IQ as new documents. Contact your administrator for more information.

# **Grid Edit**

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

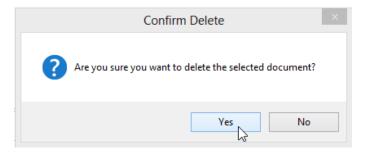
	6 3									ImageQuest						
File	Н	ome	Docu		Grid											
View	Edi	. F	Annota Add Re Route	vision	ave Local Copy	Export to @ Email Do ₩ Batch Pri	cument	Find Similar Grid Edit Show Associated	Add to Watch Li	E Ondelete	Preview Pane	History	Notes	Workflow	Active wrk Items	;
Searc	h a	×				Comma	ands		$\overline{\ }$				Panels			
			•		CreateDa	teTime = '5/	15/2014')			$\overline{}$						
×		8		Documen	tGroup	PageCount	DocumentTy	pe CreateDateT	ime	InvoiceNumber	Vendor	Date	of Invoice	Amount	Paid	
		8		Orlando		1	Invoice	5/15/2014 1	1:31:16 AM	1234	Big Corp	10/15	5/2012	\$25.	00	$\checkmark$
		8		Orlando		1	Invoice	5/15/2014 1	1:32:06 AM	5454	Test Labs,	. 10/15	5/2012	\$50.	00	$\checkmark$
		8	<u> </u>	Orlando		3	Invoice	5/15/2014 13	2:03:59 PM	7587	Big Corp	10/15	5/2012	\$835.	00	<ul> <li>Image: A start of the start of</li></ul>

### **Delete or Undelete Documents**

To delete a document, right-click on a record and select **Delete**, or highlight one or more records and click the **Delete** button **X Delete** from the "Document" ribbon group as illustrated below.

2	G							ImageQuest				
File	Hon	_	Docum Annotate		► Export to	Folder Ein	d Similar 🛛 🚺	X Delete				~
View	Edit	Ð	Add Revi Route	ision Save Loca	@ Email Do	cument 🔛 Grie	d Edit Add	Undelete	Preview H	History Notes	Workflow Act	tive
0	h <b>µ x</b>		Route	Сору	Comma		ow Associated Watch	Delete (Ctr		Panels		Items
	nentTyp	e IN (		') AND (Create		15/2014')						
		eader	nere to g	roup by that colur	nn							
Drag a	column h					1						
Drag a		6		DocumentGroup	PageCount	DocumentType	CreateDateTime	InvoiceNumber	Vendor	Date of Invoice	Amount 🔺	Paid
					-	DocumentType Invoice	CreateDateTime 5/15/2014 11:31:16 AM		Vendor Big Corp	Date of Invoice 10/15/2012	Amount 🔺 \$25.00	
		9			/ 1			1 1234		10/15/2012		

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



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

File	G	Γ	Docur								ImageQuest				
View	Hom Edit	₽ ₽ \$	Annotat Add Rev Route	te vision	Grid Save Local Copy	Export t Email Do Batch Pr Comma	cument int	🔛 Gri	d Similar d Edit ow Associated	Add to Watch List	X Delete Undelete Duplicate	Preview Pane	History	Notes Panels	Work Hist
)ocun	nentTyp	e IN (	Invoice	e') AND (	CreateDa	teTime = '5/	15/2014	<b>!')</b>		E	nter a Note	- 0	×		
Drag a		eader l	here to g	group by	that column	PageCount	Docume	ntType		enter a not hese docun	e explaining w ients.	hy you ar	e	ivoice	A
		8 8		Orlando Orlando			I Invoice		Duplicate I	Invoice	I		^	12 12	
		8		Orlando		3	3 Invoice							12	
Note	es.								-		ОК		Cancel	]	

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

File Al In No Sele	ll iverse one	Home	t Best Fit	Find Panel Auto Filter Row Group By Box Grid	Clear Group	Groups	Save Layout Forget Saved La Restore Layout	yout			
Searc	ch 🖡	×									
Docur	mentT		 e') AND (CreateDa DocumentGroup	ateTime = '5/	15/2014') DocumentType	CreateDateTime	InvoiceNumber	Vendor	Date of Invoice	Amount 🔺	Paid
	mentT	ype IN (		PageCount		CreateDateTime 5/15/2014 11:31:16 A		Vendor Big Corp	Date of Invoice 10/15/2012	Amount 4	
Docur X	mentT	S	DocumentGroup	PageCount 1	DocumentType		M 1234				)

Selecting "Undelete" from the Document ribbon (or from the document's right-click menu) as shown on the next page removes the red  $\times$  from the record and returns the document to its previous, searchable state.

<b>R</b>   <b>A</b>	G								Image	Quest
File	Home	2	Docum	nent Grid						
		Ţ.	Annotat	e 📄	🔁 Export to	o Folde	er 🛛 🛱 Find Sim	ilar 🛛 🔪 🚩	🗙 Delete	
		F	Add Rev	vision	@ Email Do	cumen	t 🛛 🐺 Grid Edit	14	🖌 Undelete	
View	Edit	4	Route	Save Local Copy	🚔 Batch Pri	int	🔗 Show As	Add to sociated Watch L	-0	Preview Pane
					Comma	ands				
Indexir	ng Queue		Se	earch 😑 🗙						
Docum	entType	IN ('	Invoice	e') AND (CreateDa	teTime = '5/	15/2	014')			
Drag a d	olumn he	ader l	nere to g	roup by that column						
×	<b>1</b>	8		CreateDateTime	PageCou	int	DocumentType	DocumentGroup	InvoiceNumber	Vendor
×		8		5/15/2014 11:31:16	5 AM	1	Invoice	Orlando	1234	Big Corp
		8		5/15/2014 11:32:06	5 AM	1	Invoice	Orlando	5454	Test Labs
		8	1	5/15/2014 12:03:59	PM	3	Invoice	Orlando	7587	Big Corp

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



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

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

### **Revising Documents**

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

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

R   A		me	Docun	nent Grid					ImageQuest			
View	Edit		Annotat Add Rev Route	te 📃	🖶 Batch	Do Pri	int Sho	id Edit ow Associated		Preview H	,	Workflow History
	ch 4) mentTv			e') AND (CreateD	Com					1	Panels	
×		8		DocumentGroup	PageCount		DocumentType	CreateDateTime	InvoiceNumber	Vendor	Date of Invoice	Amount
						1	1 Invoice	5/15/2014 11:31:16 AM	1234	Big Corp	10/15/2012	
×		. I≞1	View		Ctrl+1							
×			View Edit	Ctrl		•••••	1 Invoice	5/15/2014 11:32:06 AM		Test Labs,	10/15/2012	
×		/	View Edit Annota		Ctrl+l + Shift+E	1			5454		10/15/2012 10/15/2012	
×		<b>/</b> 早	Edit	te	+ Shift+ E	1	1 Invoice	5/15/2014 11:32:06 AM	5454	Test Labs,		
×		/	Edit Annota	te		1	1 Invoice	5/15/2014 11:32:06 AM	5454	Test Labs,		:
×			Edit Annota Add Re Route	te vision	+ Shift+ E	1	1 Invoice	5/15/2014 11:32:06 AM	5454	Test Labs,		ŝ
×			Edit Annota Add Re Route Save Lo	te vision	+ Shift+ E	1	1 Invoice	5/15/2014 11:32:06 AM	5454	Test Labs,		

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

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

History			й >
🖶 🚡 🔁 Show Details			
Action	Event Date	✓ User Name	
Revision	5/15/2014 12:04:03 PM	demo	
Save	View Revision 014 12:04:03 PM	demo	
Save	5/15/2014 12:04:03 PM	demo	
🔚 History 📄 Notes 📴 Work	flow History 🙀 Active Work Items		

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

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

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

#### **Document History**

Anything that happens to a document, be it user related or system related, gets recorded into the **History** panel making it easy for someone to see exactly who did what and when. By default, the **History** panel is located at the bottom of the screen underneath the grid. Highlight a document and click on the **History** button at the screen in the "Document" ribbon group to see the **History** panel.

	63								Ima	geQuest					
File	Ho	me	Docur	ment Grid											
View	Edit	P	Annotat Add Rev Route		ocal		Find Similar Grid Edit Show Associat	Add to Watch Lis	X Delete	te Preview	History Notes	Workflow History	Active Work Items		
Searc	h te x	x			C	ommands					Par	nels			
ocur		pe IN (		e') AND (Date	of Invoice =	ommands	)				Par	nels			
ocur	nentTy	pe IN (			of Invoice =			InvoiceNum	Vendor	Date of Inv		Paid			
ocur rag a	nentTy	pe IN ( header l	here to g	group by that co	of Invoice =	'10/15/2012'			Vendor Big Corp	Date of Inv 10/15/2012		Paid			
ocur rag a	nentTy	pe IN ( header	here to g	group by that co	of Invoice =	'10/15/2012'	e DocumentG	1234			Amount	Paid			

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

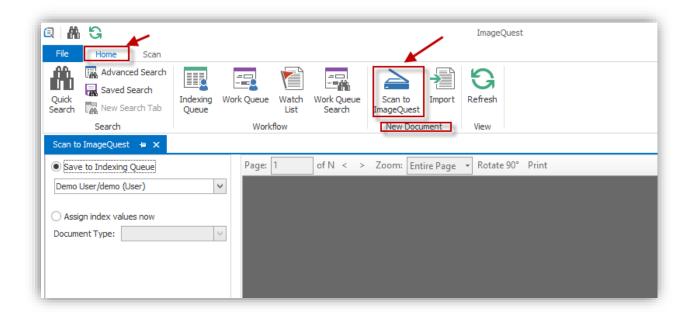
History	now Details	5				ά×
Action			▲ Event Di	ite	User Name	^
FileView			5/16/20	4 10:51:29 AM	demo	
FileView			5/16/20	4 10:51:47 AM	demo	
FileView			5/15/20	4 12:04:58 PM	demo	
Revision			5/15/20	4 12:04:03 PM	demo	
Save			5/16/20	4 10:12:39 AM	demo	
Save			5/16/20	4 10:12:44 AM	demo	
Save			5/16/20	4 10:13:00 AM	demo	
Save			5/16/20	4 10:13:14 AM	demo	
Save			5/16/20	14 10:13:16 AM	demo	¥
History	Notes	C Workflow History	🙀 Active Work Items			

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

History		<b>二</b>	×
🖶 🗈 Show Details			
Action	Event Date 👻	User Name	^
Revision	6/30/2014 2:41:21 PM	demo	
Document revision 1 added.			
Note	6/30/2014 2:39:16 PM	demo	
Undelete	6/30/2014 2:39:16 PM	demo	
Not a duplicate.			
Delete	6/30/2014 2:35:32 PM	demo	
Duplicate Invoice			$\checkmark$

#### **Scan to ImageQuest**

Scan to ImageQuest replaces the IQscan program that was shipped with earlier versions of the ImageQuest client and supports any scanner that uses a TWAIN driver. If a user has the "Add Document" permission, they will see a button for "Scan to ImageQuest" in the "New Document" ribbon group of the "Home" ribbon tab. Clicking the "Scan to ImageQuest" button will launch Scan to ImageQuest.



#### Scan to ImageQuest launches in a new tab.

Scan to ImageQuest 🗧 🗙	
Save to Indexing Queue	Page: 1 of N < > Zoom: Entire Page - Rotate 90° Print
Demo User/demo (User) 🗸 🗸	
Assign index values now	
Document Type:	

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

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

To start a new scan using the default TWAIN driver options, simply click the Scan to ImageQuest button in the "Home" tab, under the New Document ribbon group. If you need to change the source scanner or to select different scanning options, click the "Select Source" or "Scan with Advanced Options" buttons in the ribbon. After the scan is completed, you have several options available. Clicking the scan button again will append

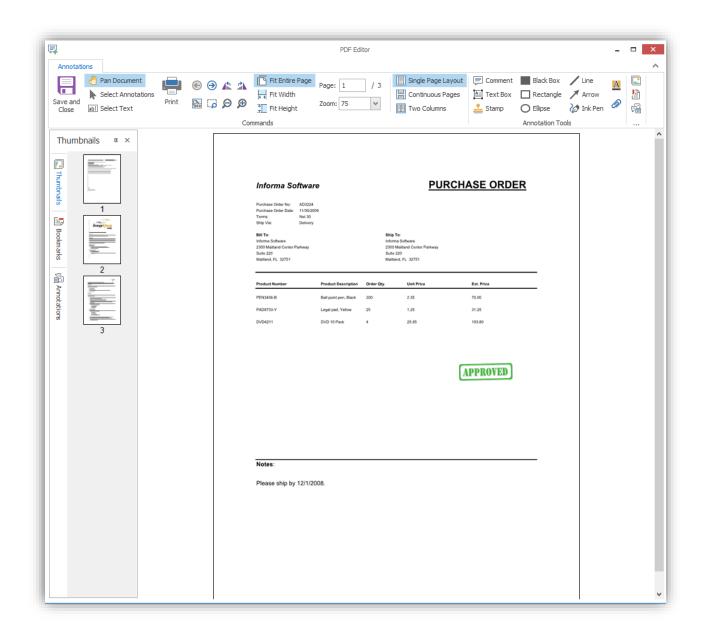
pages to the end of the current document. Clicking the  $\square$  icon will insert a page before the current page and clicking the  $\square$  icon will delete the current page. Click "Submit"  $\blacksquare$  to complete the scanning process or "Discard"  $\times$  to cancel and exit the scanning application.

			Image	Quest			
File         Home         Scan           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source         Image: Select Source           Image: Select Source         Image: Select Source	Submit C Delete Page	Discard					
Search Scan to ImageQuest 🛱	×						
) Save to Indexing Queue Demo User/demo (User)	Page: 1 of	4 < > Zoom: Entire Pag					
Assign index values now			This eventry occurs Please visit events	IN Demo Version andy when you use the dense version of DFCTAMM. and when you use the dense version of a detail a and and the second second second second second second and the second second second second second second second and the second se	ICE	informa software	
	✓		REMIT T Informa 123 Bake	D: Software	INVOICE NUI INVOICE DAT	MBER: 26543	
InvoiceNumber 88787 🔄				BILL TO: GB Graphics P.O. Box 102332 Norman, OK 75432	SHIP TO: GB Graphics 345 Oak Parkway Stillwater, OK 75622	2	
Big Corp 5			Item # 7G802 7G902 PEN100 PEN102	Description Copy Paper – WHT, LTR Copy Paper – WHT, LEGAL Pen – BLK Pen – BLU	Quantity 10 10 200 200	Unit Price Total 25.50 255.00 28.00 280.00 0.75 150.00 0.75 150.00	
10/1/2012 ¥ 5	I		PENZOE	ren - oco	200	0.15 1000	
\$835.00 5	~						
Notes Route Paid \$150 on 11/1/2012	^						
	~		AMOUN	TDUE		832.50	
Perform text extraction or OCR for keyword searching.							
binet: ImageQuest User: demo Server	example-server.informa.loca	al Scanner: XPCTWAIN TIFF/JP	EG Scanner				

#### **PDF Annotation**

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

File		lome		Docum		Grid	-			-				-					-			
View		t T	An	notate d Revi	2	Save L Cop	ocal	@ Emai	ort to Folder I Document h Print mmands		Find Similar Grid Edit Show Asso		Add Watch		🗙 Dele 🖌 Unde E Dupl	elete	Preview Pane	History	Not		Workflow History	Active Work Items
Sear	ch ⊨	×																				
Docu	mentT	ype IN	i ('Inv	voice	') AND	(Creat	eDa	teTime =	'5/15/20	14')												
Drag	a columr	n heade	er her	e to g	roup by	that co	lumn															
×		8		1	Createl	Date	Pag	eCount	Document	r	DocumentG	Invoice	Num	Vendo	or	Date	of Inv	Amount	F	Paid		
		6	) [		5/15/20	014		1	Invoice		Orlando		1234	Big Co	orp	10/15	/2012	\$25.	.00		/	
		6			5/15/20				Invoice		Orlando					10/15		\$50.				
		6		시	5/15/20	014	B	View	Terreiee		Ctrl+l		7587	Big Co	orp	10/15	/2012	\$835.	.00		/	
								Edit		Ct	rl+Shift+E											
							, ,	Annotate	e													
							Ð	Add Rev			5											
							4	Route														
								Save Loc	al Conv	Ct	rl+Shift+L											
								Export to		Cu	II+ SIIIIL+ L											
							@	Email Do			Ctrl+M											
							₩ ₽	Batch Pr			CULTIN											
							-															
							Гр П	Find Sim			CH F											
								Grid Edit			Ctrl+E											
							8	Show As			Ctrl+O											
							4		Vatch List		Ctrl+T											
							×	Delete		C	trl+Alt+D											
							മ	Undelete														
							Ē	Duplicat	e		Ctrl+D											



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

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

	Saves the annotations and closes the form
	Pan document tool – click and hold the left mouse button to move the image
2	Select annotations – use this tool to select and edit annotations
abl	Select text – click to select text on the page
<b>.</b>	Print – prints the document
E	Previous page
€	Next page
€	Zoom in – click the page to zoom in
Q	Zoom out – click the page to zoom out
( <mark>,</mark>	Marquee zoom – draw a box to define the zoom area
100	Actual size – zoom to the actual size of the document
	Fit entire page – zoom to fit the entire page to the viewer
*	Fit width – zoom to fit the document width in the viewer
*	Fit height – zoom to fit the document height in the viewer
1	Rotate left – rotates the page 90 degrees counter-clockwise
4	Rotate right – rotates the page 90 degrees clockwise
	Single page layout – display a single page at a time in the viewer
	Continuous page layout – display pages as a list in the viewer
	Two columns – display the pages in two continuous columns
	Comment – creates a comment annotation
	Text box – creates a text box annotation
	Stamp – creates a predefined rubber stamp annotation such as DRAFT or CONFIDENTIAL
	Black box – creates a solid black box annotation
	Rectangle – draws a rectangle annotation
0	Ellipse – draws an ellipse annotation
/	Line – draws a line annotation
1	Arrow – draws an arrow annotation
2	Ink pen – draw freehand ink pen markings on the page

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

A	Highlighter – draws a yellow opaque highlighter box annotation
Ø	File attachment – embed a file attachment annotation into the document

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

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

异	PDF Editor	×
Annotations Annotations Save and Close Annotations	Fit Width Continuous Pages	
Thumbnails # ×	Informa Software Purchase Origin Million Purchase Origin Million Purc	<u>R</u>
2 Annotations 3	Product Number         Product Description         Order Gly.         Unit Price         Ext. Price           PEN3456-B         Bal point pen, Black         200         2.35         70.00           PAD2733-Y         Legal pent, Velow         25         1.25         31.25           DVGM211         DVG 10 Pack         4         23.96         103.80	
	Notes:	_
	Please ship by 12/1/2008.	

		Open PDF File					×
€ ∋ - ↑ 퉫 ► N	letwork → example-server → c\$ → Invoice 20	12		v C	Search Invoice 2012		ò
Organize 🔻 New fold	ler						0
🔆 Favorites	Name	Date modified	Туре	Size			
Desktop Downloads  Recent places	1 Invoice 2012-01-01	11/1/2012 11:36 AM	Adobe Acrobat D	118 K	В		
<ul> <li>⇒ Libraries</li> <li>⇒ Documents</li> <li>→ Music</li> <li>⇒ Pictures</li> <li>➡ Videos</li> </ul>							
🖳 Computer							
🙀 Network							
File r	name: Invoice 2012-01-01			~	PDF files (*.pdf) Open <b> </b> ▼	Cancel	<b>&gt;</b>

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

		PDF Editor				×
Annotations		PDF Editor			_ (	×
Save and Close	A A Fit Entire P     Fit Width     Fit Width     Fit Height     Commands	Page: 1 / Zoom: 100 V	Continuous Pages	Text Box 🔲 Rectangle 🗡 A	rrow nk Pen	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Thumbnails * ×	Informa Software           Purthase Order Ne:         AD324           Purthase Order Date:         11302036           Term:         Net 30           Ship Vile:         Delivery           Bill 70:         Informa Software           2030 Malland Cemer Parkway         Suite 220           Malland, FL 32761         Suite 240		PUR Ship To: Informa Software 2000 Mattland Center Parkway Suite 220 Mattland, FL 32751	CHASE ORDER		^
3	Product Number Pr	roduct Description Order Qt	y. Unit Price	Ext. Price		
	PEN3456-B Ba	all point pen, Black 200	2.35	70.00		
	PAD8733-Y Le	egal pad, Yellow 25	1.25	31.25		
4	DVD4211 DV	VD 10 Pack 4	25.95	103.80		

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

Note: The insert pages feature supports single and multi-page PDF file

#### Work Queue

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

File	) Home	Docum	ent	Grid				ImageQue	st				C	· 17	
Quick Search	Advance Saved Se New Sea Search	d Search earch		xing W	ork Queu Wo	e Watch Work Queu List Search	-	Pa	Default nel Layout						
Work Queue	e ⊨ X														
)rag a colum	n header	here to g	roup by	that colu	imn										
X 🖹	8		<u> 🔗</u>		Action	Assigned To	Work Item Age	CreateDateTime	PageCount	DocumentType	DocumentGroup	InvoiceNumber	Vendor	Date of Invoice	Amount
	S		2		Routed	Demo User/demo (User)	00:02:5	2 5/16/2014 1:31:55 PM		2 Invoice	Orlando				
	8		2	1	Routed	Demo User/demo (User)	00:00:0	7 5/16/2014 1:34:50 PM		4 Invoice	Orlando				
c															
History	Sho	w Detail	5												φ. (
History	g Sho	w Detail:	5			Event D	ate				User Name				
History	Sho	w Detail:	5				ate 14 1:32:19 PM		_		User Name System				ф :
History	Created			Work Iter	ns	5/16/20									д. Д

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

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

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

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

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

🖉 Complete Work Item 🗕 🗆 🗙	
Document Type: Invoice	~
DocumentGroup	^
Orlando 🗸 🗸	
InvoiceNumber	
8979 5	
Vendor	
ABC, Inc. 🕤	
Date of Invoice	
10/2/2009 💙 👈	
Amount	
\$583.40 5	
	$\sim$
Notes Route	_
Amount is correct.	$\sim$
	$\sim$
Save Cancel	

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

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

# Work Queue Columns

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

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

### **Reassign Work Items**

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

	G								ImageQuest					
File Open Wo Searc	Reas	<b>⇒</b> sign	Docur View	Edit	Ro	nnotate dd Revisior oute	Save Local Copy	ail Document		Add to	Delete Undelete Duplicate	iew History No	otes Workflow	Active ork Items
Drag a		header	here to	group by	/ that co	lumn Action	Assigned To	Work Item Age	CreateDateTime	PageCount	DocumentType	DocumentGroup	InvoiceNumber	Vendor
		8		2		Routed	Sales (Role)		5/16/2014 1:31:55 PM	2	Invoice	Orlando		
		S		23 23		Routed Routed	Sales (Role) Demo User/demo (User)		5/16/2014 1:34:50 PM 5/20/2014 9:25:03 AM	4	Invoice	Orlando Orlando	7900	3 sample inv
			12	å		Routed	Demo Licer/demo (Licer)		5/20/2014 10:51:38 AM		Invoice	Orlando		5 ABC, Inc.
							Reassign Work Item View	Ctrl+l						
								Ctrl+Shift+E						
						-	Annotate							
						F	Add Revision							

# **Record Locking**

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

1	G							In	nageQuest						<u> –</u>	
File	Home	Docu	ment	Grid												
				📮 An	notate		🔁 Export to Fo	older 🛛 📅 Find Similar		🗙 Delete		<u>}</u> 📑		<u> </u>		
				🗗 🗛	d Revision		@ Email Docum	ent 💮 Grid Edit	V-		te			_		
Open	Reassign	View	Edit	🙈 Ro	ute	Save Loc Copy	al 🚔 Batch Print	🔗 Show Associ	Add ated Watch		Preview His Ite Pane			Active ork Items		
Work	: Item						Commands	5				Panels				
Work Q	ueue 🖶 2	×														
)rag a ci	olumn Rade	er here to	group by	that col	Jmn											
<	6		3	•	Action	Assigned To	Work Item Age	CreateDateTime	PageCount	DocumentType	DocumentGroup	InvoiceNumber	Vendor	Date of Invoice	Amount	Paid
	6		23	ſ	Routed	Sales (Role)	2 days 22:50:32	2 5/16/2014 1:31:55 PM	2	Invoice	Orlando					~
	6		2			Sales (Role)		7 5/16/2014 1:34:50 PM	4	Invoice	Orlando					~
Histo		now Detai	ils													<b>д</b> ;
		now Detai	ils				Event Date				v User Nam	e				ф.:
🖶 🛛			ils				Event Date 5/19/2014 12:22:	:00 PM			v User Nam Administr					
tion	i g Sł		ils													4
tion ork Ite	m Reassign				Active Wo	ork Items	5/19/2014 12:22:				Administr					а :

## **Other Document Management Features**

## **Find Similar Documents**

Find Similar provides an easy way to perform searches based on the results of a previous search query. For example, a search is performed for any item created in the last two weeks.. What if a user wants to search for all invoices for a particular page number that are displayed in the search results? If a user right-clicks on the "Page Count" attribute cell in the grid and selects "Find Similar", a new dialog box will pop up.

File	Hon Edit	Ę P	Docu Annota Add Re Route	te	ocal y Batch	Document	Find Sim	t Add to Dudelete	
Search	μ×	Wo	rk Quei	ue					
reat	eDateTi	ime >:	= '5/12	2/2014 12:00:0	00 AM' AND Cr	eateDateTin	e <= '5/20	)/2014 11:59:59 PM')	
rag a (	column h	eader h	ere to	group by that co	lumn			Find Similar Documents	
<u> </u>		8		CreateDate	1	DocumentT	Documento		Ven
•	-	0		5/15/2014	-	MFP Scan	Documento	Select the attributes you would like to search for.	
				5/15/2014		MEP Scan		CreateDateTime = 5/15/2014 10:15:16 AM	-
				5/15/2014	-	MFP Scan		DocumentGroup = NULL	
				5/15/2014		MFP Scan		DocumentType = MFP Scan	-
		8		5/15/2014		MFP Scan		MtpAddress = NULL	-
		8		5/15/2014		MFP Scan		MfpDisplayName = NULL	
		0		5/15/2014		MFP Scan		Mitphostivame = NULL	
				5/15/2014		MEP Scan		MfpSerial = NULL	
		8		5/15/2014	1	MFP Scan		✓ PageCount = 1	
		8	1	5/15/2014	3	MFP Scan			
		8		5/15/2014		Invoice	Orlando	Open search results in a new tab.	-
		8		5/15/2014	1	Invoice	Orlando	Search Cancel	
	_	8	1	5/15/2014	3	Invoice	Orlando		
		Ť.							>
_									
Histo	· ·	Show	v Detai	ils					<b>д</b> :
ction						Ev	ent Date	▼ User Name	
ileViev	1					5/:	5/2014 10:1	5:30 AM System	
evisio G	n listory	- To V	Vorkflov	w History 🛛 🎧	Active Work It		5/2014 10:1 tes	5:18 AM System	

Notice that "Page Count" has been automatically checked. If the user had right-clicked on the "Invoice Number" cell, that field would have been checked by default instead. Clicking the search button at this point would do a new search where "PageCount" is equal to "1". Additional attributes can also be selected as well to "AND" the results together.

#### **New Search Tab**

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

	M G	i							ImageQu	est						<b>^</b> -	
File	н	lome	Docu	ment Grid													
Quick		Advance Saved S New Sea	earch		Work Queue	Watch Work ( List Sea				Default anel Layout							
	Se	earch			Workflo	w	Ne	w Document	Vie	w							
Norl	k Oueue		Sear	dh ⊨ x													
_	· ·																
rea	ateDate	eTime >	= '5/1	3/2014 12:00:	00 AM' AND CI	reateDateTin	ne <= '5/19/2	014 11:59:59	PM')								
an	a column	header	here to	group by that co	alumo												
_		8		CreateDate	PageCount	DocumentT	DocumentG	Amount	Date of Inv	InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial	Paid	Ve
_		9 9	<b>(</b>	CreateDate 5/14/2014	-	DocumentT MFP Scan	DocumentG	Amount	Date of Inv	InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial	Paid	Ve
_		-			4		DocumentG	Amount	Date of Inv	InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial		Ve
_		S		5/14/2014	4	MFP Scan	DocumentG	Amount	Date of Inv	InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial		Ve
_		S		5/14/2014 5/14/2014	4	MFP Scan MFP Scan	DocumentG	Amount	Date of Inv	InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial		Ve
_		S		5/14/2014 5/14/2014 5/14/2014	4 4 1 74	MFP Scan MFP Scan MFP Scan	DocumentG	Amount	Date of Inv	InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial		Ve
_		S		5/14/2014 5/14/2014 5/14/2014 5/15/2014	4 4 1 74 3	MFP Scan MFP Scan MFP Scan MFP Scan	DocumentG	Amount	Date of Inv	InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial		Ve
_		S		5/14/2014 5/14/2014 5/14/2014 5/15/2014 5/15/2014 5/15/2014	4 4 1 74 3 3	MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan	DocumentG	Amount	Date of Inv	InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial		Ve
_		S S		5/14/2014 5/14/2014 5/14/2014 5/15/2014 5/15/2014 5/15/2014 5/15/2014	4 4 1 74 3 3 3 3	MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan	DocumentG	Amount	Date of Inv	InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial		Ve
_		S S S		5/14/2014 5/14/2014 5/15/2014 5/15/2014 5/15/2014 5/15/2014 5/15/2014	4 4 1 74 3 3 3 3 2	MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan	DocumentG	Amount	Date of Inv	InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial		Ve
_		S S		5/14/2014 5/14/2014 5/14/2014 5/15/2014 5/15/2014 5/15/2014 5/15/2014 5/15/2014 5/15/2014	4 4 1 74 3 3 3 3 2 2 1	MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan	DocumentG	Amount	Date of Inv	InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial		Ve
<		S S S		5/14/2014 5/14/2014 5/15/2014 5/15/2014 5/15/2014 5/15/2014 5/15/2014	4 4 1 74 3 3 3 3 2 2 1 1 41	MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan MFP Scan	DocumentG	Amount	Date of Inv	InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial		

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

ØÅ.	Search		□ ×
Full-Text Search:			
			5
Quick Advanced Save	d		
Document types to include:	Invoice		~
Enter values for any attributes	Check		
DocumentGroup	Invoice MFP Scan		
	I MEP Scan		
Vendor Name			
Big Corp Vendor Id			
Vendor Id			
Date of Invoice			
Amount			
InvoiceNumber	Select All Clear		ОК
-Account Number	to or		¢ 🗸
Clear		Search	Cancel

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

2 6	6								ImageQue	t				
File	Hor	me	Docum	ent Grid										
View	Edit	Ð			@ Ema	il Document	Find Similar	V.	to to	lete Previe	w History N		Workflow History	Active Work Items
Searc	h	Se	arch ቱ	×	Co	ommands						Panels		
Docui	nentTyp	e IN (	Invoice	') AND (Vende	or = 'Big Corj	o')								
Drag a	column h	neader	here to g	roup by that co	umn									
×		8		CreateDate	PageCount	DocumentT	DocumentG	InvoiceNum	Vendor	Date of Inv	Amount	Paid		
	E	S		5/15/2014		1 Invoice	Orlando	1234	Big Corp	10/15/2012	\$25.00		<b>~</b>	
		B	1	5/15/2014		3 Invoice	Orlando	7587	Big Corp	10/15/2012	\$835.00	1	/	

# **Save Local Copy**

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

🔍 🛛	<b>на Са</b> но	me	Docur	ment Grid	1						ImageQue	st		
View	Edit	Ð	Annotat Add Rev Route		ocal y Ba	nail D itch F	ocument	Find Similar Grid Edit	٨	dd to tch Lis	X Dele	elete Previev	History	Notes Wo His Panels
(Crea		ſime >		<b>3/2014 12:00:(</b> group by that co	lumn	_		e <= '5/19/2	014 11:59:		-	InvoiceNum	MfpAddress	MfpDispla
		6		5/14/2014 5/14/2014 5/14/2014 5/15/2014 5/15/2014 5/15/2014 5/15/2014			View Edit Annotate Add Revisio Route		Ctrl+I Shift+E					
		& &		5/15/2014 5/15/2014 5/15/2014 5/15/2014		 Э	Save Local C Export to Fo Email Docur	lder	Shift+L Ctrl+M	J.				

## **Email Document**

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

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

a <b>m</b> 5			Ir	nageQuest						<u> </u>	×
File Home Document Grid											^
Open Reassign View Edit		Export to Fol Email Docume		Add to Watch List	X Delete Undelete Duplicat	Preview Hist	ory Notes Wo	rkflow	Active lork Items		
Work Item		Commands					Panels				
Search Work Queue 😑 🗙											-
Drag a column header here to group by that column											
🗙 🖺 🔗 🗊 🤣 🔒 Action	Assigned To	Work Item Age	CreateDateTime	PageCount Doo	cumentType	DocumentGroup	InvoiceNumber	Vendor	Date of Invoice	Amount	Paid
🔗 🔜 🗳 Route			5/16/2014 1:31:55 PM	2 Inv	oice	Orlando					~
	Open Work		ft+W .4 1:34:50 PM	4 Inv	oice	Orlando					$\checkmark$
	Reassign W	/ork ltem									
	View	С	Ctrl+I								
	/ Edit	Ctrl+Shi	ift+E								
	Annotate										
	Add Revisio	an an									
	Route										
	·										
	Save Local		ift+L								
	Export to F										
	② Email Docι	iment Ctr	rl+M								
	🖶 🛛 Batch Print		13								
1 Kabaja j	Find Simila	r									
History	Grid Edit	Ct	trl+E								<b># ×</b>
	Show Asso	ciated Ct	trl+O								
Action			trl+T								^
Work Item Reassigned						Administra	tor				
buve	X Delete	Ctrl+A	AIT+D			System					~
🔚 History 🛛 🔂 Workflow History 🚳 Activ	-										
Cabinet: ImageQuest User: demo Server: example	Duplicate	Ct	trl+D							Results	s:2of2 .:

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

≣ਜ਼ਿਨਟੇ↑↓⊽	Untitled - Message (HTML)
FILE MESSAGE INSERT OPTIONS FORMAT TEXT REVIE	W
Image: Copy       Image: Copy         Paste       Image: Copy         Image: Copy       Image: Copy     <	Address Check Book Names File Item
Clipboard 🗔 Basic Text 🗟	Names Include Tags 🕞 Zoom
To       Send       Subject       Attached	

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

## **Batch Print**

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

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

							Image	Quest						<u> </u>	
Work Item	Document ew Edit	🖧 Ro	d Revision	Save Local Copy	Export to For Email Docum Batch Print Commands	nent 💮 Gri		Add to Watch Lis	X Delete	ete Preview His	tory Notes W	orkflow istory W	Active /ork Items		
	Queue 😑					-									
Drag a column header he							-								
	3 🔗		Action	Assigned To	Work Item Age	CreateDateTi	-		ocumentType	DocumentGroup	InvoiceNumber	Vendor	Date of Invoice	Amount	Paid
6 6	s 2		Routed	Sales (Role) Open Work It	2 days 23:20:5 tem Ctrl+Shit		4:50 PM		ivoice	Orlando Orlando					
					Ctrl+Sh opy Ctrl+Sh der										
History	Details		₽2 	Find Similar Grid Edit Show Associa		trl+E :rl+O									ц >
Action			` <b>k</b>	Add to Watch	blist O	trl+T				👻 User Nam					
Work Item Reassigned			1+ X	Delete	Ctrl+A					Administra	ator				_
Save	orkflow Histor	у 😭	Acti 🖍		Ctri+P					System					
Cabinet: ImageQuest l	lser: demo	Server: e	Kamr E	Duplicate	C	trl+D								Result	ts: 2 of 2

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

## Watch List

The purpose of the **Watch List** is to bookmark a document for future reference instead of having to search for it again. To watch a document, highlight the document and select "**Add to Watch List**" by right-clicking and selecting it from the drop down menu or click on "Add to Watch List" button from the "Document" ribbon tab.

A G			Im	ageQuest					▲ -	
File Home Document	Grid									
Dpen Reassign View Ed	Add Revision	<ul> <li>Export to Folder</li> <li>Email Document</li> <li>Batch Print</li> </ul>		Add to	Undelete Duplicate	ory Notes Wor His	kflow /	Active ork Items		
Work Item		Commands		×		Panels				
Search Work Queue	×				<b>`</b>					
rag a column header here to group	by that column									
< 🖹 🔗 📄 🧇	Action Assigned To We	/ork Item Age Cr	reateDateTime	PageCount Docume	ntType DocumentGroup	InvoiceNumber	Vendor	Date of Invoice	Amount	Paid
🔗 🔝 🕹			/16/2014 1:31:55 PM	2 Invoice	Orlando					~
<i>6</i> 🖪 🔮	🖁 🔒 Routed Sales (Role) 2	2 days 23:26:4 🐶		Ctrl+Shift+W	Orlando					~
			Reassign Work Ite	m						
			View	Ctrl+I						
			Edit	Ctrl+Shift+E						
			Annotate							
		5	Add Revision							
		3	Route							
			Save Local Copy	Ctrl+Shift+L						
		@		Ctrl+M						
			Batch Print							
				0.1.5						Щ.
History			Grid Edit	Ctrl+E						
,				Ctrl+O						
🖶 🐻 🚡 Show Details	Fv	vent Date	Show Associated							
,		vent Date /19/2014 12:2		: Ctrl+T	✓ User Name Administrat	or				
🖶 🚯 🚡 Show Details	5/	vent Date		: Ctrl+T Ctrl+Alt+D		or				
Action Work Item Reassigned	5/	vent Date /19/2014 12:2 /16/2014 1:32	Add to Watch List Delete		Administrat	or				

The "Watch List" may be accessed from the "Home" ribbon tab by clicking on the "Watch List" button. The **Watch List** opens in its own tab as shown below and is specific to each user.

	AL (	3						Image(	Quest					<u> </u>	□ ×
File		Home	Doc	ument Grid											^
View		dit	Annot Add Ri Add Route	evision Save Local	Export to Fo Email Docume Batch Print		t Kemove	from	Delete Undelete Duplicate	w History Note	Workflow History	Active Work Items			
					Commands	;				P	anels				
Sear	rch 🕸		Work Que	eue Watch List	+ ×										-
Drag X	a colun	in hea		group by that column	PageCount	DocumentType	DocumentGroup	Amount	Date of Invoice	InvoiceNumber	MfpAddress	MfpDisplayName	MfpHostName	MfpInputUser	MfpSeria
				5/14/2014 10:38:36 Af	4	1 MFP Scan									
			<b>_</b>	5/15/2014 10:15:11 AM	4	8 MFP Scan									
			6 🔜	5/15/2014 10:15:15 AM	4	1 MFP Scan									
			6 🔜	5/16/2014 1:31:55 PM	:	2 Invoice	Orlando								

To stop watching a document, click on "Remove from Watch List" from the "Document" ribbon tab or from the right-click menu.

# **Export to Folder**

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

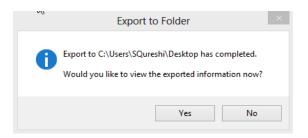
Only the documents selected in the current grid will be flagged for export. Hold down the CTRL key while clicking individual documents to select individual documents or press CTRL+A to highlight all of the documents in the grid. Once all the documents have been selected, click "**Export to Folder**" from the Document ribbon tab to export the selected documents to a folder or right click and selected "Export to Folder" from the drop down box as demonstrated on the next page.

	G							Image	Quest						<b>T</b> -	• ×
File	Hon	ne	Docu	ment Grid												^
		- - -	Annota Add Re		Export to Fol Email Docume		V.		Delete Undelete		9		<b>\$</b>			
View	Edit	4	Route	Save Local Copy	Batch Print	Show A	Remove	from List	Duplicate	Previe Pane		es Workflow History	Active Work Items			
					Commands	-					P	anels				
Search	4	W	ork Que	ue Watch List	+ ×											-
Drag a c	olumn h	eader	here to	group by that column												
X		8		CreateDateTime	PageCount	DocumentType	DocumentGroup	Amount	Date of	Invoice	InvoiceNumber	MfpAddress	MfpDisplayName	MfpHostName	MfpInputUser	MfpSerial
				5/14/2014 10:38:36 AM	1	MFP Scan										
				5/15/2014 10:15:11 AM		MFP Scan										
		8		5/15/2014 10:15:15 AM		L MFP Scan				View		Ctrl+I				
		S		5/16/2014 1:31:55 PM		2 Invoice	Orlando		/	Edit	C	Ctrl+Shift+E				
									-	Annota	ite					
									P	Add Re	vision					
									4	Route						
										Save Lo	ocal Copy C	Ctrl+Shift+L				
									<b>r</b> →	Export	to Folder		1			
									0	Email [	Ocument	Ctrl+M	<b>X</b>			
									ě	Batch I	Print					
									5	Find Si	milar					
<									- 🛒	Grid Ec		Ctrl+E				>
Histo	ry								6		Associated	Ctrl+0				ųх
l 🐥 (		Sho	w Detai	ils							e from Watch Lis					
Action						Event Date			×	Delete		Ctrl+Alt+D				^
FileView						5/15/2014 10:2	7:58 AM					Ctrl+Alt+D				
Revision						5/15/2014 10:1	5:11 AM		2	Undele						¥
Ca Hi	story	C	Workflo	w History 🚳 Active	Work Items	Notes 📔				Duplic	ate	Ctrl+D				
Cabinatu	Impose	Jugat	Heart	dama Carrieri evennele	normer informa	lacal									Dogulta	. A
Cabinet:	imagec	Juest	User: (	demo Server: example-	server.informa.	local									Results	:4014 .::

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

Browse For Folder	×	2
Select a location below to store the data and images for retrieved documents.	the	
⊿ j₽ Computer	^	
4 🏪 Local Disk (C:)		
I all files		
MyExportedFiles		
D 🏭 AMD		
🌗 PerfLogs		
Program Files		
Program Files (x86)		
🛛 📔 Users		
🌗 Virtual Machines		
Windows		
	¥	
Make New Folder OK Cancel		

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



The window below displays the exported documents in a searchable html file (default.hta). Double-click a row to view a document in its native viewer.

								C:\all file	s\MyExportedFi	les\MyExport\d	efau
In	na	ge	e G	Juest							
Cho	oose a	n att	ribut	e to search by. (No	ote: The value i	is case sensitive.)					
Attr	ibute:			Va	lue:		_				
Cre	eateDa	ateTi	me	~							
6	earch		lear	1							
<u> </u>	earch		lear	1							
×		8		CreateDateTime	PageCount	DocumentType	DocumentGroup	Amount	Date of Invoice	InvoiceNumber	M
		8		05-15-14	1	MFP Scan					
		8		05-15-14	1	Invoice	Orlando	25	10-15-12	1234	

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

# **Duplicate**

To create a duplicate copy of a record, highlight the record and select **Duplicate** from the right-click menu or from the "Document" ribbon tab as illustrated below.

ä	G								ImageQu							<u></u>	
File	Ho	me	Docu														
		> 早	Annota			rt to Folder	Find Similar		🛛 🚩 🗙 De	lete	5		- 🙀				
iew/	×		Add Re		- (CD Email	Document	💮 Grid Edit		Un 🖌 🖌	delete			_				
view	Edit	4	Route	Save L Cop		h Print	Show Asso	ciated	Add to Watch List	plicate Preview	History N	Notes Workflow History					
					Cor	mmands			S			Panels					
Search		×															
			= '5/1	3/2014 12:00:	00 AM' AND Cr	eateDateTim	e <= '5/19/2	014	1:59:59 PM')								
ag a	column	header	here to	group by that co	olumn												
		8		CreateDate	PageCount	DocumentT	DocumentG	Amo	unt Date of Inv	. InvoiceNum	MfpAddress	MfpDisplay	MfpHostName	MfpInputUser	MfpSerial	Paid	Ver
				5/15/2014	3	MFP Scan			110	Ctrl+I	1						
		8		5/15/2014	2	MFP Scan			View								
		8	2	5/15/2014	1	MFP Scan		1	Edit	Ctrl+Shift+E							
			2	5/15/2014	41	MFP Scan		Ę.	Annotate								
			-	5/15/2014	1	MFP Scan		P	Add Revision								
		8	-	5/15/2014	1	MFP Scan		4	Route								
		8	2	5/15/2014	3	MFP Scan											
		8		5/15/2014	1	Invoice	Orlando		Save Local Copy	Ctrl+Shift+L						$\checkmark$	Big
		8		5/15/2014	1	Invoice	Orlando	r i i i i i i i i i i i i i i i i i i i	Export to Folder							✓	Te
		8	1	5/15/2014	3	Invoice	Orlando	0	Email Document	Ctrl+M						~	Big
		8	-	5/16/2014		Invoice	Orlando	ě	Batch Print							~	
		8	-	5/16/2014		Invoice		_								~	
		8		5/16/2014	4	Invoice	Orlando	Þ	Find Similar							$\checkmark$	
									Grid Edit	Ctrl+E							)
listo	orv –							8	Show Associated	Ctrl+O							ņ
	1	_							Add to Watch List	Ctrl+T							
	lò i	g Sho	w Deta	ls				4									
tion							ent Date	×	Delete	Ctrl+Alt+D							
eViev							5/2014 10:27:4					System					
evisio	n						5/2014 10:15:1	Ē.	Duplicate	Ctrl+D		System					
٦	listory	E 💽	Norkflo	w History 🛛 😭	Active Work It	ems 📄 📔 No	tes	-			1						

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

🖉 Duplicate Document 🗧 🗆	×
Document Type: Invoice	~
DocumentGroup	^
Orlando	v 5
InvoiceNumber	
7587	÷
Vendor	
Big Corp	5
Date of Invoice	
10/15/2012	¥ 5
Amount	
\$835.00	5
	~
Notes Route	
	$\sim$
	$\sim$
Save	Cancel

**Note:** Users must have the "Add Document" permission to create duplicate records. 104

#### **Show Associated**

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

R 🗚 Ġ			ImageQuest	<u></u> –	□ ×
File Home Document Grid					
Open Reassign View Edit Ranotate	Export to Fo @ Email Docum ave Local Copy Batch Print		Add ta Madelete		
Work Item	Commands	s	Panels		
Search 🏨 🦳 Work Queue 🖶 🗙					
Drag a column header here to group by that column					
🗙 📑 🔗 📄 🧇 🔒 Action Assi	gned To Work Item Age	CreateDateTime	PageCount DocumentType DocumentGroup InvoiceNumber Vendor Date of Inv	oice Amount	Paid
🔗 🛃 🍰 Routed Sale		Chall, Chiffe, M/	M 2 Invoice Orlando		
🔗 🛃 👶 Routed Sale	Reassign Work Item		M 4 Invoice Orlando		$\checkmark$
	View	Ctrl+I			
	Edit	Ctrl+Shift+E			
	Annotate				
	Add Revision				
	🐴 Route				
	Save Local Copy	Ctrl+Shift+L			
	Export to Folder				
	@ Email Document	Ctrl+M			
	🖶 Batch Print				
	Find Similar				
History	Grid Edit	Ctrl+E			μ×
🖶 👔 show Details	Show Associated	Ctrl+0			
Action	Add to Watch List	Ctrl+T	✓ User Name		1
Work Item Reassigned	X Delete	Ctrl+Alt+D	Administrator		
Save			System		
🖫 History 🛛 🔀 Workflow History 🙀 Active Work It	Duplicate	Ctrl+D			
Cabinet: ImageQuest User: demo Server: example-server.	nforma.iocai	cui b		Result	ts: 2 of 2

All associated documents, if any, will appear in their own tab. Associated documents display the  $\overset{\circ}{\sim}$  icon next to them as shown below.

S	earch 🖡	Wo	ork Queu	e	As	sociated	≠×							
Dra	ag a column	header	here to g	group by	that col	umn								
X		8		<b>8</b>	•	Action	Assigned To	Work Item Age	CreateDateTime	PageCount	DocumentType	DocumentGroup	Amount	Date
		8		2		Routed	Sales (Role)	2 days 23:59:19	5/16/2014 1:31:55 PM	2	Invoice	Orlando		
		8							5/15/2014 10:15:15 AM	2	MFP Scan			

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

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

#### **Import a File**

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

To import a file, click the <sup>1</sup> button from the "Home" ribbon tab to launch a Windows "Open" dialog as seen below. Locate and select the file to import and click Open to launch the "Import to ImageQuest" indexer and assign a Document Type and attribute values.

Home	ImageQ	Quest	
Advanced Search Quick earch R Saved Search Lindexing Work Que Queue Work Que	ue Watch WorkQueue List Search ImageQuest		
Search V	/orkflow New Document View		
	Ope	en	×
$\langle \in \rangle $	↑ → Libraries → Documents →	✓ C Search Docum	ents P
Organize •	New folder		iii 🔹 🔟 🔞
🚖 Favori	es Name	Date modified Type	Size
🛄 Desk	top 🔋 🖟 Add-in Express	5/14/2014 9:01 AM File folder	
Dow	-	2/25/2013 2:00 PM File folder	
📃 Rece	nt places 🔰 🎉 Snagit	5/14/2014 9:06 AM File folder	
	MFP Scan	5/19/2014 12:46 PM TIF File	39 KB
📄 Librari 🖹 Doci			
a) Mus			
<b>6</b> 7 1003	· · ·		
	File name:	✓ All files (*.*)	¥
			Cancel
		Open	Cancel

Users can also "drag and drop" files onto the application to them to IQdesktop, as seen here.

Image: Computer       Indexing Work Queue Wath Work Queue       Son to Import ImageQuest       Refeat         Search Search Table       Work Queue Wath Work Queue       New Document       New Document         Search Search Table       Work Queue Wath Work Queue       Demo Docs       -       ×         Search Search Table       Work Queue       Wath Work Queue       New Document       New Document         Search Search Table       Petture Tools       Demo Docs       -       ×         File       Home       Share       View       Manage       ×       •         Image: Queue       Wath       Up 12.0 + Demo Docs       -       ×       •       •         Image: Queue       Manage       ×       •       •       •       •       •         Image: Queue       Manage       ×       •	Home Home	III III III III III III IIII IIII IIII IIII		ImageQuest
It       It <td< th=""><th>uick arch</th><th>Indexing Work Queue Watch Work Queue List Search</th><th>e Scan to Import Refresh ImageQuest</th><th></th></td<>	uick arch	Indexing Work Queue Watch Work Queue List Search	e Scan to Import Refresh ImageQuest	
Music       Nxme       Date modified       Type       Size         Pictures       Videos       4/24/2014 2:25 PM       TIF File       65 KB         Computer       TypegDoc       4/24/2014 2:41 PM       TIF File       78 KB         Computer       Invoice       3/11/2014 10:38 AM       TIF File       39 KB         Music       Invoice       3/11/2014 10:38 AM       TIF File       39 KB         Invoice       3/11/2014 10:38 AM       TIF File       39 KB         InvoiceGBGraphics       3/11/2014 4:44 PM       TIF File       39 KB         InvoiceGBGraphics       3/11/2014 4:44 PM       TIF File       10 KB         Videos       Videos       Videos       Videos       Mark         Videos       Videos       3/11/2014 4:44 PM       TIF File       30 KB         Videos       Videos       3/11/2014 4:44 PM       TIF File       30 KB         Videos       Videos       3/11/2014 4:44 PM       TIF File       10 KB         Videos       Videos       3/11/2014 4:44 PM       TIF File       10 KB         Videos       Videos       Videos       TIF File       10 KB         Videos       Videos       Videos       TIF File       10 KB <th>l D D = I File Home Share</th> <th></th> <th>Demo Docs</th> <th></th>	l D D = I File Home Share		Demo Docs	
Image: Section of the section of	€ ∋ - ↑ 퉬 « sc		emo Docs v 🖒 Search Demo	Docs A
imment into Improve	Pictures Videos Coraputer Cocal Disk (C:) AMD PerLogs Program Files Program Files Program Files Virtual Machine Virtual Machine Virtual Folders (J)	TpageDoc     TpageDoc2pager     TpageDoc2pager     InvOICE sample 1     Invoice     InvoiceBGGraphics	4/24/2014 2:25 PM TIF File 4/24/2014 2:41 PM TIF File 4/24/2014 2:40 PM Microsoft Wi 3/11/2014 10:43 AM TIF File 3/11/2014 10:58 AM TIF File	65 KB 78 KB 78 KB 32 KB 39 KB 30 KB 10 KB

Once a file has been selected, the user can index the document as shown below. A User or Role may be selected for routing purposes and a message can optionally be filled out. Click "OK" to import the document to IQdesktop.

3	Impor	t to Ima	geQuest			-	
MFP Scan.tif	Page: 1	of 4	4 < > Zoom: Enti	re Page 🝷 Rot	ate 90°		
Select Document Type:							
Invoice					• • •	-	
DocumentGroup			INVO	ICE	Infor		
Orlando 🗸 🗸 🕤					softw	are	
InvoiceNumber		REMIT TO: Informa Softw		INVOICE NU INVOICE DA		3 /2007	
26543 5		123 Baker Stre Orlando, FL 3					
Vendor Big Corp			BILL TO: GB Graphics P.O. Box 102332 Norman, OK 75432	SHIP TO: GB Graphics 345 Oak Parkway Stillwater, OK 7562	2		
Date of Invoice			Norman, OK 75452	sunwater, OK 7502	2		
5/12/2007 V to		ltem #	Description	Quantity	Unit Price	Total	
		7G802 7G902	Copy Paper – WHT, LTR Copy Paper – WHT, LEGAL	10 10	25.50 28.00	255.00 280.00	
Amount \$832.50		PEN100 PEN102	Pen – BLK Pen – BLU	200 200	0.75 0.75	150.00 150.00	
\$832.50 5							
✓ Paid							
Route		AMOUNT DU	E			832.50	
Route To:							
4 Y							
Message:							
<u></u>							
Perform text extraction or OCR for keyword searching	].				OK		Cancel

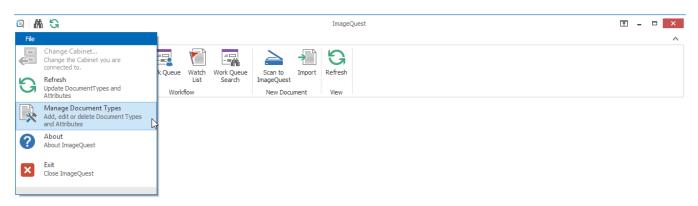
An "Import Successful" message will confirm the import is complete, as shown below. Click on "OK" to continue.



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## **Managing Document Types**

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



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

R 🛗 Ġ							ImageQuest		
Quick Advanced Search	dexing Work Que	ue Watch List	Work Que Search	eue :	Scan to ageQuest	- Import	<b>G</b> Refresh		
Search	w	orkflow			New Docu	iment	View		
Manage Document Ty Document Types Attributes	pes								
Add Edit	By default, a	allow all users	permission	to this d	ocument to				
Invoice		lo not give pe							
Check Invoice MFP Scan	By default, o	lo not give pe		this doc					
Invoice		lo not give pe				<u>.</u>	w Attribute		
Invoice		lo not give pe	ermission to	this docu	ument type Assign	<u>.</u>	w Attribute Include in Filename	Input Mask	
Invoice	Assign attribute t	do not give pe to Check	ermission to	this docu	ument type Assign	Add Ne		Input Mask Currency	
Invoice	Assign attribute t	do not give pe to Check Data Type Numeric	Required	this docu	ument type Assign	Add Ne	Include in Filename		
Invoice	Assign attribute t	do not give pe to Check Data Type Numeric	Required	this docu	ument type Assign	Add Ne	Include in Filename No	Currency	
Invoice	Assign attribute t Name Amount TransactionDate	do not give pe to Check Data Type Numeric Date & Time	Required No	this docu	ument type Assign	Add Ne	Include in Filename No Yes	Currency	
Invoice	Assign attribute t Name Amount TransactionDate TransactionID	do not give pe to Check Data Type Numeric Date & Time Integer	Required No No	this docu	ument type Assign	Add Ne	Include in Filename No Yes No	Currency	

# Additional ImageQuest Client Applications

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

- Microsoft Windows Explorer Connector
- Microsoft Office Connector
- IQprinter

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

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

	Preview
	Set as desktop background
	Edit
	Print
	Send To ImageQuest
	Preview
	Rotate right
	Rotate left
2	Edit with Notepad++
	O

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

🖹 Send To ImageQuest 🗙
MFP Scan.tif
Select Document Type
Invoice 🗸
DocumentGroup
Orlando 🗸 🕤
InvoiceNumber
7894 5
Vendor
Big Corp. 5
Date of Invoice
5/18/2014 🗸 🕤
Amount
\$890,00 5 4
- Routing
Route To:
V 5
Message:
^
V
Perform OCR or text extraction for keyword searching.
OK Cancel

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



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

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#### **Microsoft Office Connector**

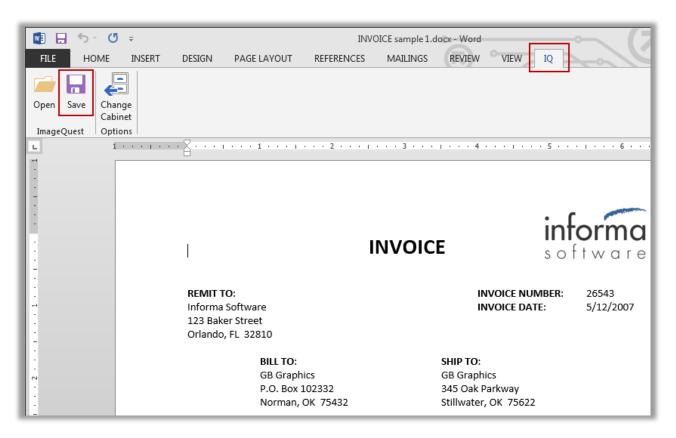
ImageQuest provides an add-in for several Microsoft Office programs which allows for sending and in some cases opening documents from ImageQuest. The following Microsoft applications are supported:

- Microsoft Word 2003 2016
- Microsoft Excel 2003 2016
- Microsoft Outlook 2003 2016

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

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

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



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

What would you like to do with the changes made to the current file?   Add a Revision   Save your changes as a new revision to the existing document.   Image: Create a New Document Save the current file as a new document.   Route To:   Message:   Message:   Image: Create a New Document Save the current file as a new document.   Image: Create a New Document Save the current file as a new document.   Image: Create a New Document Save the current file as a new document.   Image: Create a New Document Save the current file as a new document.   Image: Create a New Document Save the current file as a new document.   Image: Create a New Document Save the current file as a new document.   Image: Create a New Document Save the current file as a new document.   Image: Create a New Document Save the current file as a new document.   Image: Create a New Document Save the current file as a new document.   Image: Create a New Document Save the current file as a new document.   Image: Create a New Document Save the current file as a new document Save the current file as a new document.   Image: Create a New Document Save the current file as a new document Save the current Save	Save Changes	
Paid	What would you like to do with the changes made to the current file? Add a Revision Save your changes as a new revision to the existing document. Create a New Document Save the current file as a new document. Route To: Message:	Fill in the information for this document in the fields below. Document Type Invoice Orlando Orlando Vendor ABC, Inc. 5/19/2014 Amount
		✓ Paid

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

(	Open from ImageQuest	- 🗆 🗙
Search Watch List Work Queue		
		Results:
	Open	Cancel

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

Open from ImageQuest	– 🗆 X
Search Watch List Work Queue	
	Search 🗖 🗙
	Full-Text Search:
	5
	Quick Advanced Saved
	Document types to include: All
	Enter values for any attributes you wish to search for:
	Amount
	CheckNumber
	the control of the second seco
	CreateDateTime
	05/08/14 v O to v O to
	Date of Invoice
	Description
	t or t
	DocumentGroup
	v t3 or v t3 v
	Clear Search Cancel

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

					Open from	ImageQue	st				×
Ĥ		5									
	 	Work Q	ueue 2014 12:00:00	) AM' AND Cre	ateDateTime	<= '5/19/20	14 11:59:59 F	νM')			
×	6		CreateDate			DocumentG	1	-	InvoiceNum	MfpAddress	T
	8		5/14/2014	4	MFP Scan						
	8		5/14/2014	4	MFP Scans						
			5/14/2014	1	MFP Scan						
			5/15/2014	74	MFP Scan						
		<b>.</b>	5/15/2014	3	MFP Scan						Т
			5/15/2014	3	MFP Scan						
			5/15/2014	3	MFP Scan						
	8	<b>.</b>	5/15/2014	2	MFP Scan						
	8		5/15/2014	1	MFP Scan						
		<b>_</b>	5/15/2014	41	MFP Scan						
			5/15/2014	1	MFP Scan						
<										:	>
										Results: 21 o	of 2
									Open	Cance	:

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

🗐 Sa	ave Changes – 🗆 🗙
What would you like to do with the changes made to the current file?   Add a Revision   Save your changes as a new revision to the existing document.   Create a New Document   Save the current file as a new dock yent.   Route To:   Message:	Fill in the information for this document in the fields below.   Document Type   Invoice   Orlando   Orlando   InvoiceNumber   7898   Yendor   sample invoice   5/20/2014   \$545.00   \$2   Paid

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

Quick Search I X X DocumentType IN Drag a column heade X I O											
Quick Search Search Search Search CocumentType IN Drag a column heade X Search Search CocumentType IN Drag a column heade X Search Search CocumentType IN Drag a column heade X Search Search Search Search Cocument Search						ImageQu	lest			<b>T</b> -	
Quick       Image: Search       Image: Search         Search       Image: Search       Image: Search         Search       Image: Search       Image: Search         DocumentType IN       Image: Search       Image: Search         Trag a column heade       Image: Search       Image: Search         Image: Search       Image: Search       Image: Search         Image: Search </th <th>anced Search</th> <th>Grid</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>	anced Search	Grid									
Search 19 X DocumentType IN Drag a column heade X International Column FileView Original document Revision			Watch Work Q List Sear	Queue Scar	n to Import	G Refresh	Default Panel Layout				
DocumentType IN Drag a column header Drag a column header	th	Workflo	ow	Nev	w Document	Vie	ew				
Prag a column heade Image: A column heade											
Prag a column heade Image: A column heade	IN ('Invoice') AND (Cr	eateDateTime >	>= '5/20/2014	12:00:00 AM	AND CreateD	ateTime <=	'5/20/2014 1	1:59:59 PM')			
Kistory History Ciganal document Revision											
History E C s s sh Action FileView Original documen Revision											
Action FileView Original documen Revision		e PageCount	DocumentT				Date of Inv		Paid		
Action FileView Original documen Revision	5/20/2014		Invoice	Orlando	7898	sample invoice	e 5/20/2014	\$545.00	<b>&gt;</b>		
Action FileView Original documen Revision											
FileView Original documen Revision											ф (
Original documen Revision			Eve	ent Date				,	<ul> <li>User Name</li> </ul>		
Revision			5/2	0/2014 9:41:04	AM				demo		
Document revisio	nent viewed.	1	5/2	0/20149:30:56	AM				demo	 	
Save											ļ
			5/2	0/2014 9:26:11	AM				System		
Cabinet: ImageQuest	vision 1 added.	🚳 Active Work I		0/2014 9:26:11 tes	AM				System		

Microsoft Word and Excel 2003 function the same as the 2007, 2010, and 2013 versions; however, the icons are located in the ImageQuest toolbar. See examples below.

🕎 Document 1 - Microsoft Word	🕎 Document1 - Microsoft Word
Eile Edit Yiew Insert For	Eile Edit View Insert Form
i 🗅 💕 🖬 💪 🔒 🖪 🕰 🔍	i 🗅 📂 🖬 💪 🔒 🚳 🔍 i
· 🖳 🔌 📮	: 💾 💽 💂
Save to ImageQuest	Open from ImageQuest
1	1

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

The Microsoft Office Connector for Microsoft Outlook 2013 differs from the Microsoft Word and Excel Connectors in that it allows the user to save emails and/or attachments into IQ and there is no option to open from IQ. Once again, the IQ ribbon tab is available with two options available when sending to ImageQuest:



The Microsoft Office Connector for older versions of Microsoft Outlook installs a new toolbar with one button called "Send to ImageQuest". This button has two send options, "Entire Email..." and "Attachments Only..." as well.

C	J Inb	ox - Mi	crosoft (	Outloo	ok	
	<u>F</u> ile	<u>E</u> dit	<u>V</u> iew	<u>G</u> o	<u>T</u> ool	S C
1	😭 <u>N</u>	ew 👻	و ال	$\times$	🙈 <u>R</u>	eply
	Send	to Imag	geQuest			
	$\bigcirc$	Entire	Email			
		Attach	iments (	Dnly		
	٩	Option	ns			13
	2	Unread	Mail			

To store an email message in IQ, open Microsoft Office Outlook and locate the **Send to ImageQuest** ribbon group button in the "**IQ**" ribbon tab as shown below:

o 🗈	\$.∓					Inbox - :
FILE	HOME	SEND / RECEIVE	FOLDER	VIEW	IQ	
Email	ttachments Only mageQuest	Configure Options				

To send the entire email to IQ, highlight the email in Microsoft Outlook, under the **Send to ImageQuest** group click "Entire Email". The **Send to ImageQuest** window appears allowing the user to select a Document Type and fill in the associated attributes as demonstrated on the following page. Click the "OK" button when finished.

2	Send To ImageQuest	×
Infor	ma Email Test	
Select Docume	ent Type	
Invoice		~
DocumentGro	up	^
Orlando	¥	5
InvoiceNumbe	r	
8787		5
Vendor		
ABC Inc.		5
Date of Invoid	e	
4/10/2010	~	5
Amount		_
\$56.25		5 V
Routing —		
Route To:		
		v 5
Message:		
		~
		$\sim$
Perform O	CR or text extraction for keyword searchin	g.
	OK Car	ncel

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

To send one or more attachments without the main message body, follow the same steps, but this time click on "Attachments Only" button from the "IQ" ribbon tab.

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

Choose Attachments
SampleSNAG.snag
OK Cancel

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

Send To ImageQuest	×
(2 items)	
Select Document Type	
Invoice	$\checkmark$
DocumentGroup	^
Orlando 🗸 🗸 🕁	
InvoiceNumber	
520 5	
Vendor	
ABC, Inc. 5	
Date of Invoice	
5/20/2014 🗸 🕁	
Amount	
\$525.25 5	4
Routing	
Route To:	
V 1	ь
Message:	
	<u>)</u>
$\checkmark$ Perform OCR or text extraction for keyword searching.	
OK Cancel	

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

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

🔅 Con	figuration Settings
Cabinet: ImageQ	Quest Change
Document Type:	✓ ×
Recipient: From:	Check Invoice MFP Scan
Subject:	<b>v</b> ×
Date:	<b>v</b> ×
	OK Cancel

### **IQprinter**

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

<b>.</b>		1	Devices and Printers			- 0	×
⊛ ⋺ • ↑	📾 🕨 Control Pane	el → Hardware and So	und → Devices and Printe	ers v C	Search Devices an	d Printers	,p
Add a device	Add a printer	See what's printing	Print server properties	Remove device		-	0
Devices (6)							
		Ø					
AMD HDMI Output (AMD High Definition Audio Device)	ASUS VH232H	Basic Optical Mouse	Generic PnP Monitor	TEMP2-PC	Wired Keyboard 400		
Printers (6)							
CutePDF Writer	HP Color Laser CM6040 MFP [Norm] on infupdate		Microsoft XPS Document Writer	Send To OneNote 2013	Snagit 10		
	Category:	novaPDF OEM 7 Printe Printer 0 document(s) in queu					

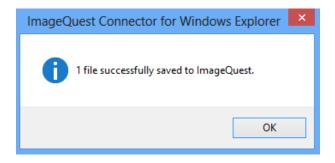
IQprinter can now be selected from a Windows Print dialog as shown below.

		Print	
Printer			
Name:	IQprinter		✓ Prop
Status: Type: Where: Comment:	Snagit 10 Send To OneNote 201 Microsoft XPS Docum IQprinter CutePDF Writer \\infupdate\HP Color	-	[Norm]
Print style			Copies
	Memo Style	Page Setup	Number of pages: All Number of copies: 1
		Define Styles	Collate copies
			11 22 3
Page range			
IIA (			
Pages:			
commas cou	numbers and/or page r unting from the start o		

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

Print To ImageQuest	×
Select Document Type	
Invoice	$\sim$
DocumentGroup	
Orlando 🗸	•
InvoiceNumber	
3345	Ф.
Vendor	
ABC, Inc.	5
Date of Invoice	
1/15/2011 🗸	ь
Amount	
\$766.00	•
🗹 Paid	
- Routing	
Route To:	
V 4	э
Message:	
	^
	1
Perform OCR or text extraction for keyword searching.	
OK Cancel	

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



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

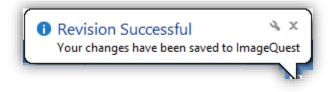
## ImageQuest Assistant

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

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

Add Revision to ImageQuest?
ImageQuest has detected changes to a file you're working on. Would you like to save these changes as a revision?
Document Type
Invoice
DocumentGroup
Orlando 🗸 🗸 🕤
InvoiceNumber
3345 5
Vendor
ABC, Inc. 🕁
Date of Invoice
1/15/2011 🗸 🗸
Amount
\$766.00 🕤
✓ Paid
Routing
Route To:
V 5
Message:
^
×
Yes No

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



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