KwikTag for WorkSite

Product Description
KwikTag Paper-Capture for Worksite 8.X

Overview: Matter Centric Support

Matter Centric Document Management provides sizable benefits, but for maximum value, paper needs to be scanned and included in the repository.

KwikTag for WorkSite enables organizations that utilize Interwoven’s WorkSite 8.X to employ KwikTag’s patented tagging method to easily file paper into the WorkSite Repository. It supports the Matter Centric profiling methods of the latest releases of WorkSite (8.X and up).

Easy to Learn

KwikTag for Interwoven makes capturing paper into the DMS repository easier than ever. Even if users don’t have the WorkSite client open at the time a paper document arrives, KwikTag lets them easily profile, tag and set the document aside. Users are not required to open the WorkSite client, and they can continue with their work. Productivity is maximized and training is minimized because KwikTag works with both the DeskSite and FileSite clients. Users do not need to learn or launch anything new.

KwikTag for Interwoven at the Client

KwikTag for WorkSite embeds KwikTag’s patented tagging method to take advantage of the matter-centric features related to Interwoven WorkSite 8.X. This creates separation in the scanning and profiling steps so that users can perform these functions at their convenience.

Specifically, users of both the FileSite and DeskSite clients have the ability to profile paper documents in a manner similar to other profiling activities (see the Figure 1 below). KwikTag for WorkSite is designed to provide compatibility with 8.X FileSite and DeskSite clients whether you have deployed matter-centric features or not.
Multiple Ways to Capture Paper

KwikTag for WorkSite gives users flexibility to profile documents in the way that is most convenient. Working hand-in-hand with Interwoven’s client, KwikTag lets users profile from several locations to scan paper with the least possible effort.

For example:

- In WorkSite, by right-clicking on a folder, users can select a new option on the context menu of the folder titled “KwikTag Paper Document.” Selecting this option presents the standard form used for the document library, or it could present a special form used only for profiling paper documents, if desired. (The standard form is recommended.) True to the matter-centric nature of WorkSite 8.X, profile fields will be auto-populated, if the option is selected from a WorkSite 8.X folder.

--or--

- Users may also click on a button to activate the profile form. The icon (“Tagman,” shown at right) will appear on the toolbar of DeskSite or FileSite and perform just
Alternatively, users who do not employ either DeskSite or FileSite may invoke the KwikTag functionality from a desktop shortcut or Quick Launch item. For example, from the Windows task bar, the KwikTag icon will open the WorkSite work list for profiling the paper to be scanned.

Whatever method the user chooses, all methods launch the same executable.

Figure 2 – KwikTag Dialog within Interwoven
KwikTag for Interwoven

Compared to profiling an electronic document, KwikTag lets users profile paper with as little as a single, extra mouse click. Besides standard document profiling steps already being done by users, KwikTag for Interwoven adds the additional step, illustrated below:

![KwikTag Dialog](image)

Figure 3 - KwikTag Dialog

When a user starts the process using any of the above-described options, the following occurs:

1. The KwikTag dialog (Figure 3, above) shows the user’s next barcode number in their dispenser
   a. The user confirms the number or modifies it to match the next number in their dispenser
   b. The user clicks OK

2. The barcode number is retained and the user is taken to the appropriate WorkSite profiling screen, where the user profiles a document in the usual manner:
   a. The user enters metadata specific to their document
   b. If configured for matter-centric functionality, the profile dialog will inherit metadata from the context, i.e. folder (See Figure 4 below)
   c. The user presses “Save”

3. The profile information along with the barcode number is saved in WorkSite
   a. A temporary PDF document is uploaded as a placeholder, which will be automatically replaced when the scanned document arrives
Figure 4 – Pre-filled Profile, after KwikTag Dialog
KwikTag for Interwoven also gives users additional capabilities, such as:

1. Send an email notification related to the document. For example, there may be several attorneys working on a matter, and all are copied when a new document arrives. KwikTag will let you replace the copy-and-distribute process with an automatic email notification and a link to the document.
2. Change the file type of the stored document, e.g. PDF, PDF Image +Text, TIFF, OCR-to-MSWord
3. Add or change image processing options, e.g. rotation, barcode redaction.

Figure 5 - KwikTag Dialog - Expanded View

These options are available to the user via an expanded view of the KwikTag. The user invokes these options by clicking on the chevrons in the lower right section of the dialog. The dialog “remembers” its last state, either standard or expanded. An example appears to the left.
KwikTag Does The Rest – KwikTag’s Paper Gateway®

Once a user scans a document, KwikTag does all the work, finishing the process of getting the document into the DMS repository. The KwikTag Paper Gateway is a high performance image processing engine on a server that runs fully automated and performs the various tasks required to deliver and store documents into the appropriate repository.

KwikTag’s Paper Gateway monitors the output of the various scanning devices in your organization. When a batch of documents is scanned, KwikTag’s Paper Gateway uses the bar codes to separate the documents, insures that all documents are stored and displayed upright, and performs various other tasks that have been selected, such as OCR and converting to PDF Image +Text, email notifications, and so on.

Rigorous, automated quality control functions assure that documents are accurately captured and stored, monitoring to make sure all profiled documents get scanned, counting to assure the feeder has pulled and scanned each page of a document, and checking that the quality of the scan is adequate. When a problem occurs, the user or administrator is notified.

Platform for the Enterprise

A single KwikTag system lets users profile documents into multiple Interwoven libraries on multiple servers, making KwikTag the easiest multiple office solution to administer, and further extending the value of KwikTag to the enterprise.

For taming the paper monster, KwikTag is the most comprehensive and expandable tool for the enterprise. Use it to get paper into your DMS, get control of the paper in billing and accounting, scan documents so they can be emailed, scan and repurpose documents for editing in MS Word and other applications, while KwikTag automatically tracks all these activities for audit and compliance.

KwikTag will give you the control you need for the paper in your firm.

Stable, Repeatable for Other Applications

KwikTag for Interwoven is powered by KwikConnect, KwikTag’s easy to use software development kit (SDK). The APIs simplify integration to applications like WorkSite, requiring fewer lines of code to integrate, and thus creating more stable integrations. The power and simplicity of Connect has been used to add paper-capture to other law firm applications, and it may be used for your custom applications, as well.
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