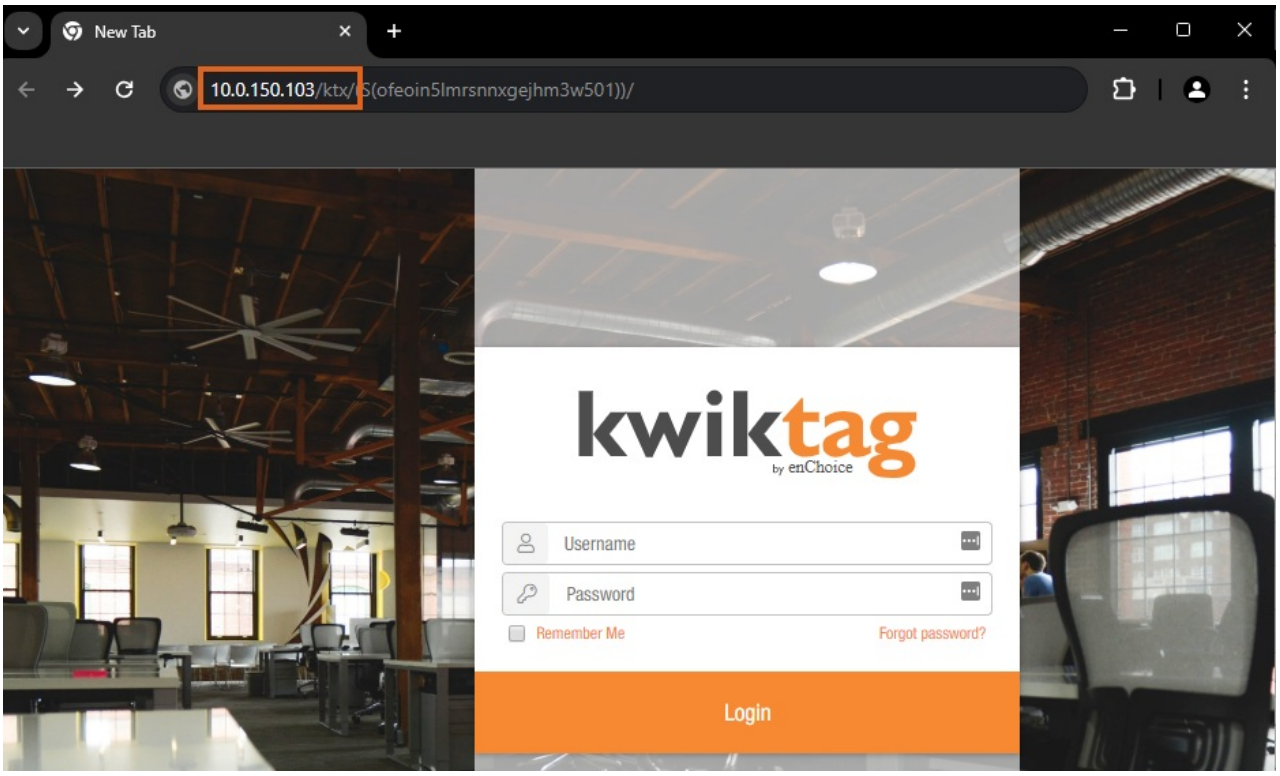
KwikTag Overview

Last Modified on 07/22/2025 2:52 pm CDT

KwikTag is a document imaging system that gives the ability to scan and electronically store various Agvance transactions and documents.

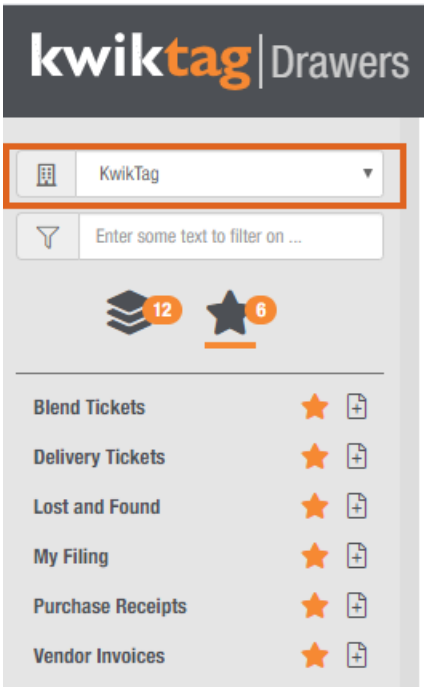
Logging In

To access KwikTag, in a web browser, enter the URL provided by KwikTag. This IP address allows access to the KwikTag server using a Chrome browser by adding */ktx* after the IP address of the server.



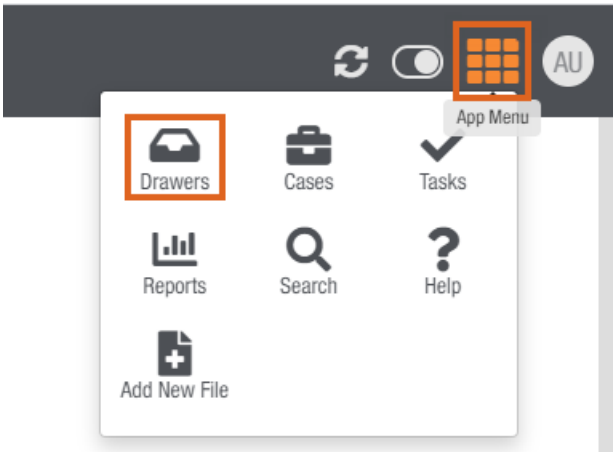
Once logged into KwikTag, select the option to view drawers.

The icon on the left shows all available drawers and the Star icon shows favorite drawers.



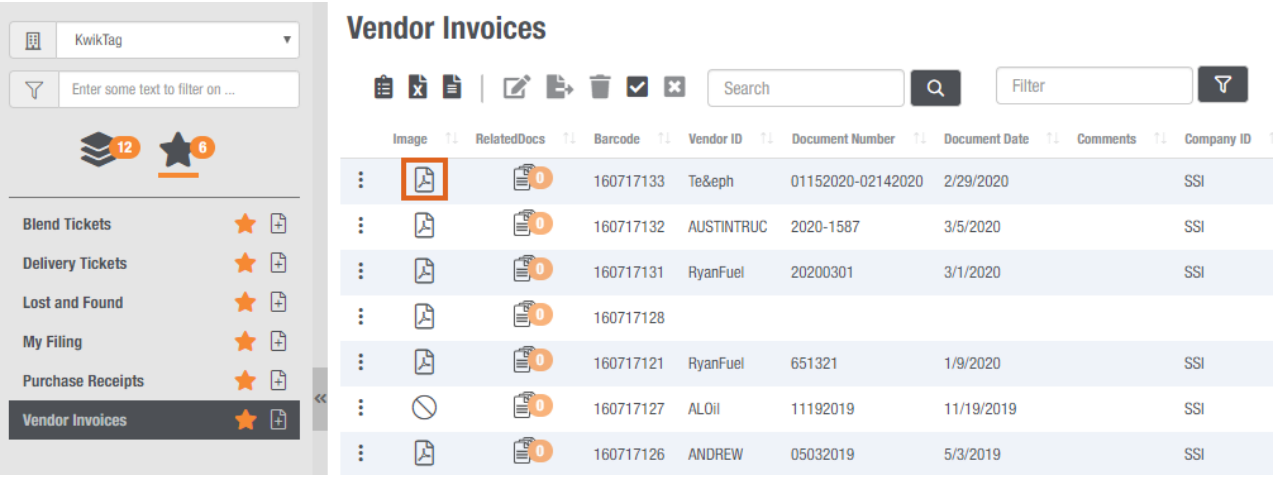
Accessing Drawers

The *App Menu* in the upper right-hand corner provides quick access to the drawer list.

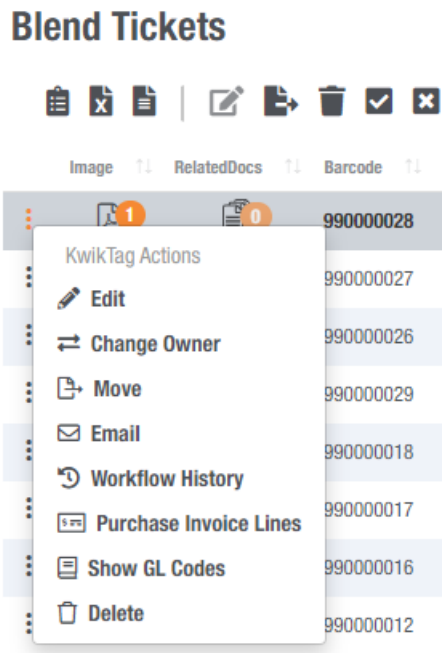


Selecting the drawer in the left-side menu displays available documents in the right-side viewing pane.

A scanned image of the document can be viewed by selecting the **PDF** icon. When selected, the document opens in the right-hand viewing pane and can be downloaded or opened in a new tab.



Selecting the vertical **Ellipsis** icon displays actions for the selected document. Options include the ability to edit meta data, move the document to a different drawer, and email or delete the document from the server.



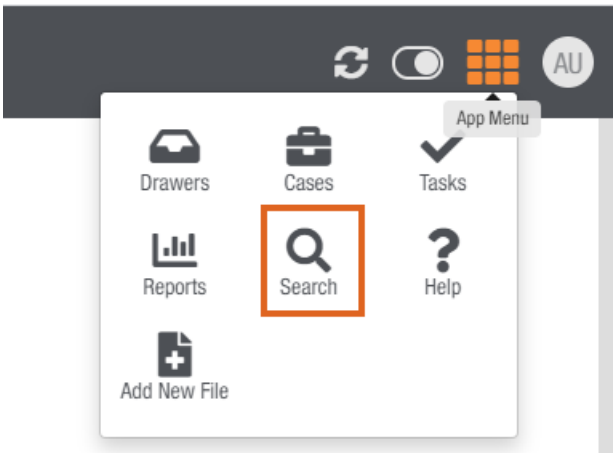
Searching and Filtering

There are two ways to perform a search in KwikTag:

- **By Drawer** – Find or filter documents in the selected drawer. Entering information into the Search or Filter field and selecting the **Magnifying Glass/Funnel** will search/filter the selected drawer.

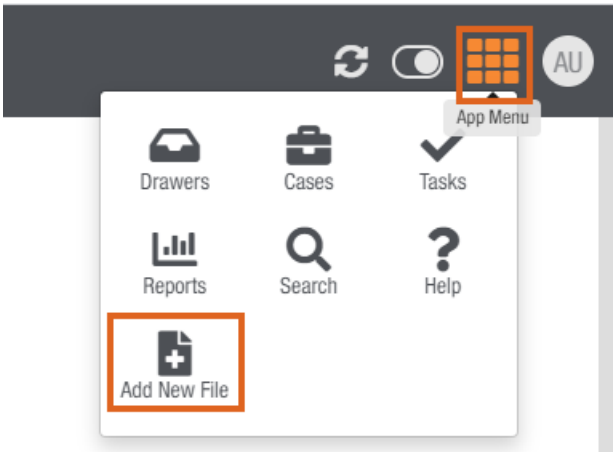


- **Global Search** – Toggle between the options to match the search criteria exactly or to search for items which contain the specified search criteria. The Advanced Search options give the ability to search filing information as well as document content.

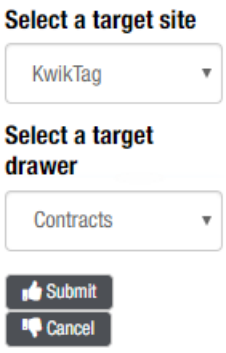


Add New File

A new document can be added to KwikTag by selecting the **App Menu** and choosing **Add New File**.

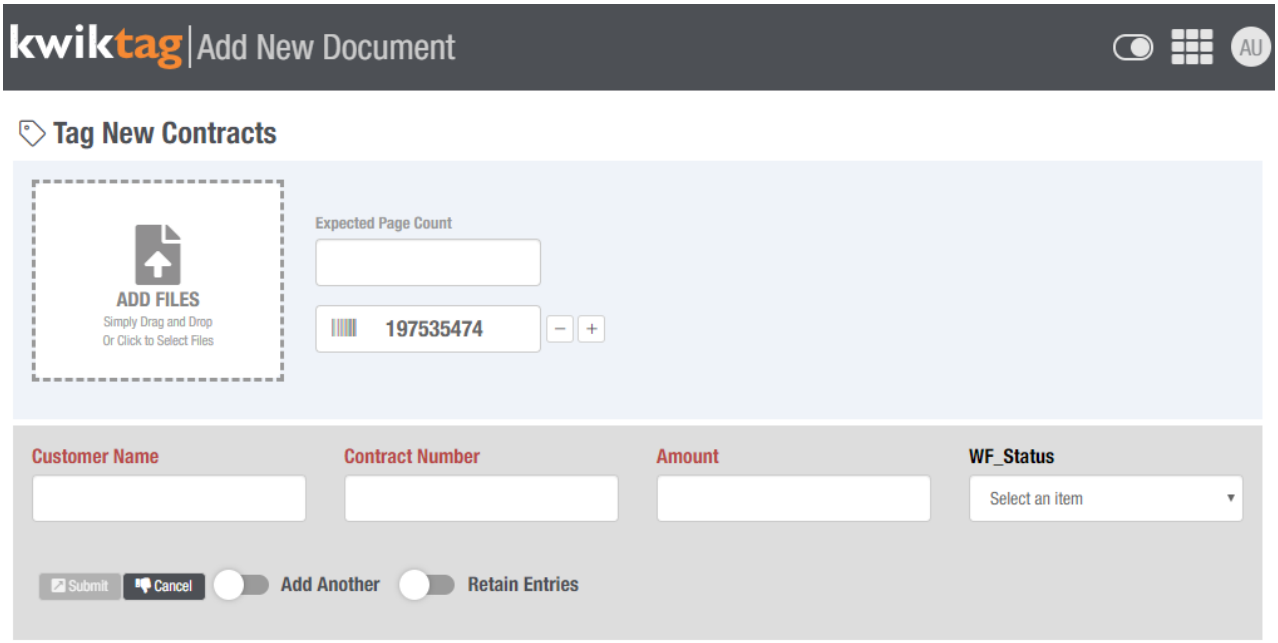


Select the *Target Site* and *Drawer* for the document and choose **Submit**.



If the files are electronic, they may be added at this point. Physical documents must have the appropriate barcode sticker adhered before scanning.

Enter the required meta data for this drawer and select **Submit** to complete the reservation.


kwiktag | Add New Document
AU
Tag New Contracts
ADD FILES
Simply Drag and Drop
Or Click to Select Files
Expected Page Count
197535474
Customer Name
Contract Number
Amount
WF_Status
Select an item
Submit
Cancel
Add Another
Retain Entries