

iGuana



iDesk Manual









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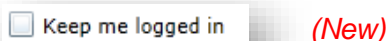
iDesk Manual



iDesk is the Document Viewing Tool for the iGuana Platform.

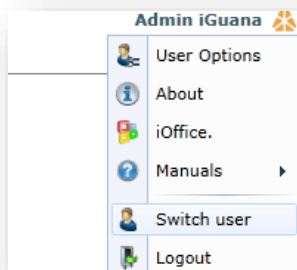
It is a web application build with Silverlight technology and can be accessed through a web browser via <http://<iGuana Path>/iDesk/>

When you first navigate to the URL the login screen will appear and users with accounts can login to the application.



The Keep me logged in option is to save your username and password so, that you will not need to write your credentials every time you go to iDesk.

You can enter with other credentials or go again to the login page by using Switch user from the Right menu of the Application.



Main Work Area

Main Work Area (Simple View)



Figure 1 – Main Work Area (Simple View)

After a successful login the user can navigate to the application using the features tree on the left and top hand side to perform actions. The above screen shows you the Main work Area in its initial stage.

Main Work Area (Advanced View)

After you start working around (will show next how), the application also opens helpful navigation panels to make easier access to your files, documents, and Tools.

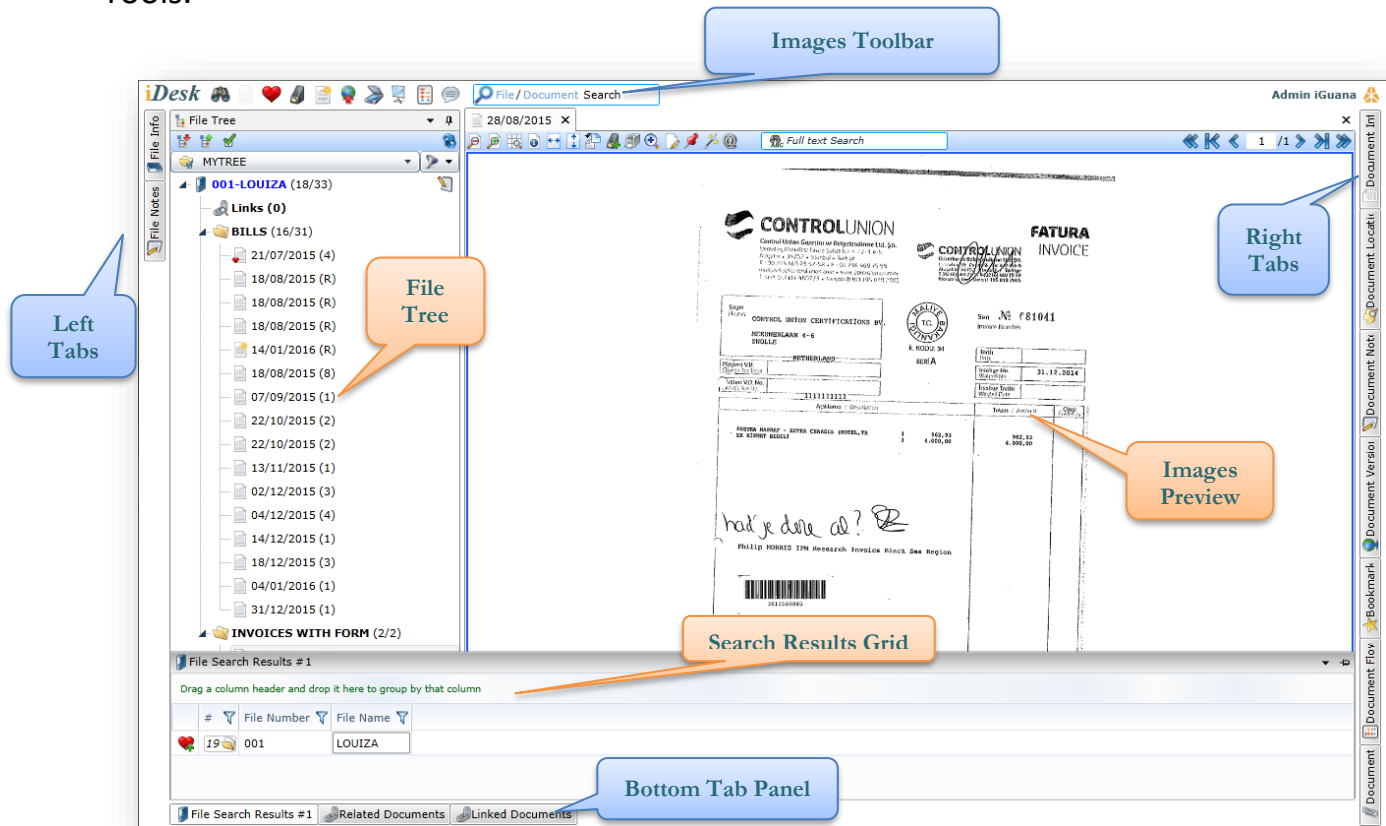
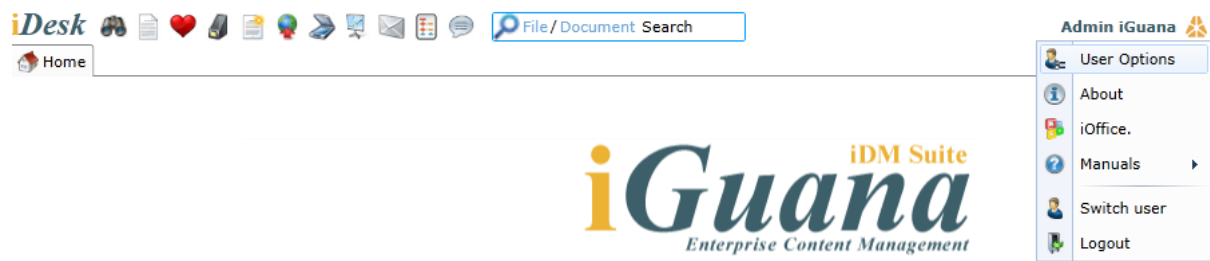


Figure 2 Main Work Area (Advanced View)

User Preferences

On the right top corner of the browser , click on the button icon to see the Options.



User Options

The 'User Options' dialog box is shown with three main sections:

- User Info:** Fields for 'Name' (Admin) and 'Surname' (iGuana).
- User Configuration:** Dropdown menus for 'Language' (English), 'Image View' (Single Page), 'Image View Method' (Fit to page), 'Search Method' (File Search), and 'iDesk Startup Window' (Home).
- IMAP Credentials:** Fields for 'Username' (email@Exchange-server.com) and 'Password' (masked).

Callouts point to specific features:

- Change Password of iGuana:** Points to a separate 'Change Password' dialog box with fields for 'Old Password', 'New Password', and 'Retype New Password'.
- Default view preferences:** Points to the 'Image View' and 'Image View Method' dropdowns.
- Exchange server credentials:** Points to the 'Username' and 'Password' fields in the IMAP Credentials section.

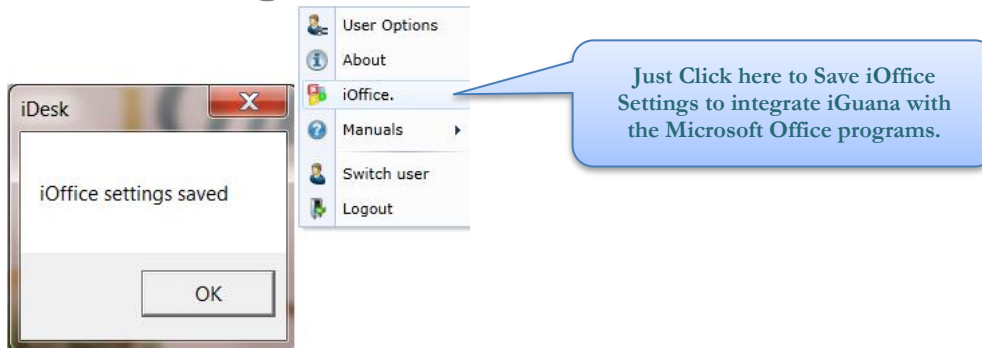
Note: Depending on your Exchange's Setup, you may need to write your full email, or just the login name

About

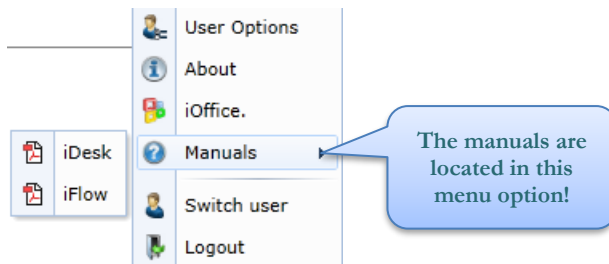


Application's About Section shows information about the Application and links you may visit.

iOffice Settings

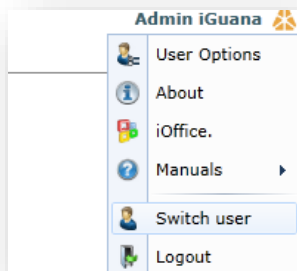


Manuals



Switch User

You can enter with other credentials or go again to the login page by using Switch user from the Right menu of the Application.



Logout

You can logout from the Application by using this option.

Navigation

Let's have a closer look to the iDesk Features.

Toolbar Menu

In the picture below you can see an explanation of the Toolbar buttons.

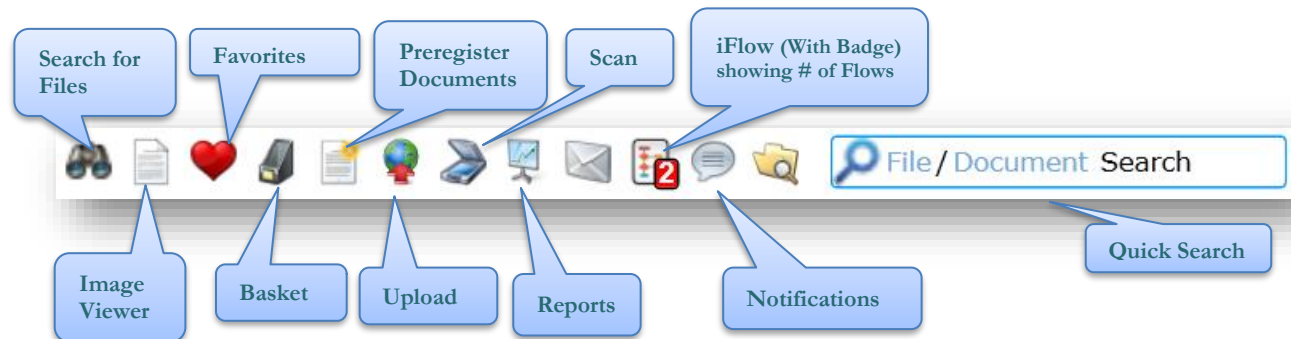


Figure 3 – Top Toolbar Menu

Note: In order for a user to access the above features they must be defined in **iManage** Module from the Administrator.

Search Tools

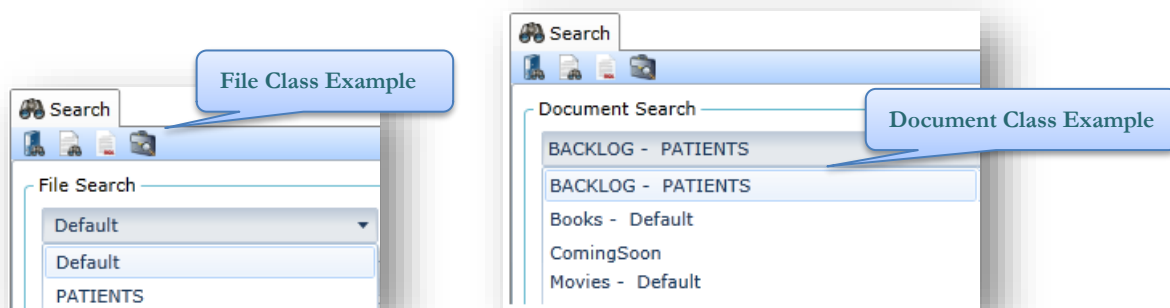
The search Tool helps us find records through our Files or Documents.

File is the metaphor used in the system to describe the entities that the document belongs to. A file can be a customer, a product, a patient, a company an employee etc.

These files are grouped together in **File classes** that have common characteristics.

Document class is as a grouping for documents that we want to have the same indexes and treat them in a similar way, like Invoices, Receipts etc..

For example:



Click on the **Search** button from the Toolbar menu and you will see the Search Screen.

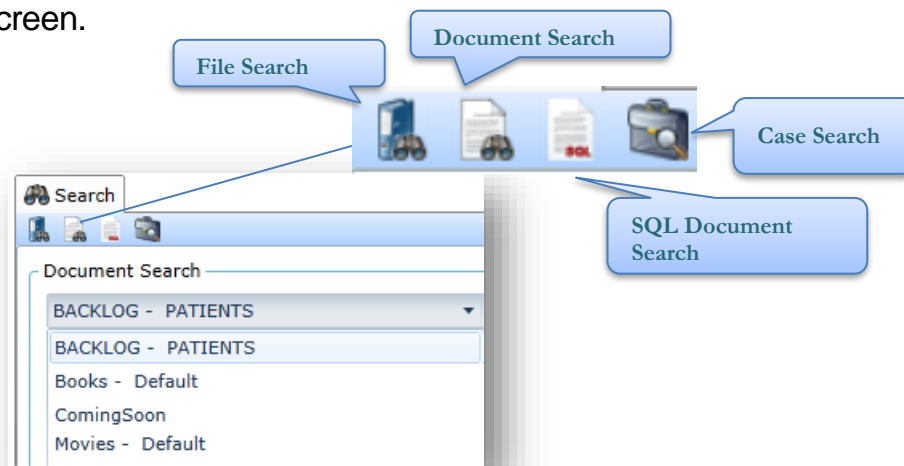


Figure 4 – Search Tools

File Search

By default, the File Search is a convenient way to start a search. Using the File Search, you can locate files by providing any of the related metadata. Select the File class name you want to find documents. Write criteria either by giving a File Number or File Name and click on Search. Below in the grid you can see Files found.

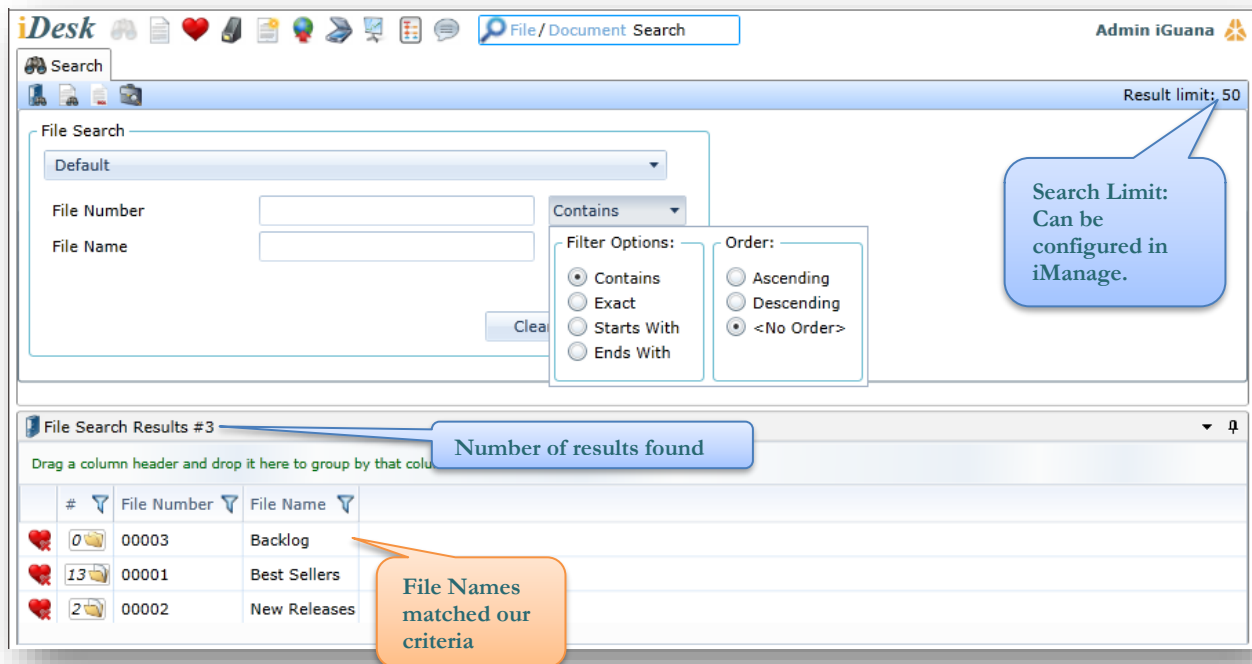



Figure 5 – File Search Screen

Document Search

Click on the  Document Search button, to search through Documents in the Specific File Class

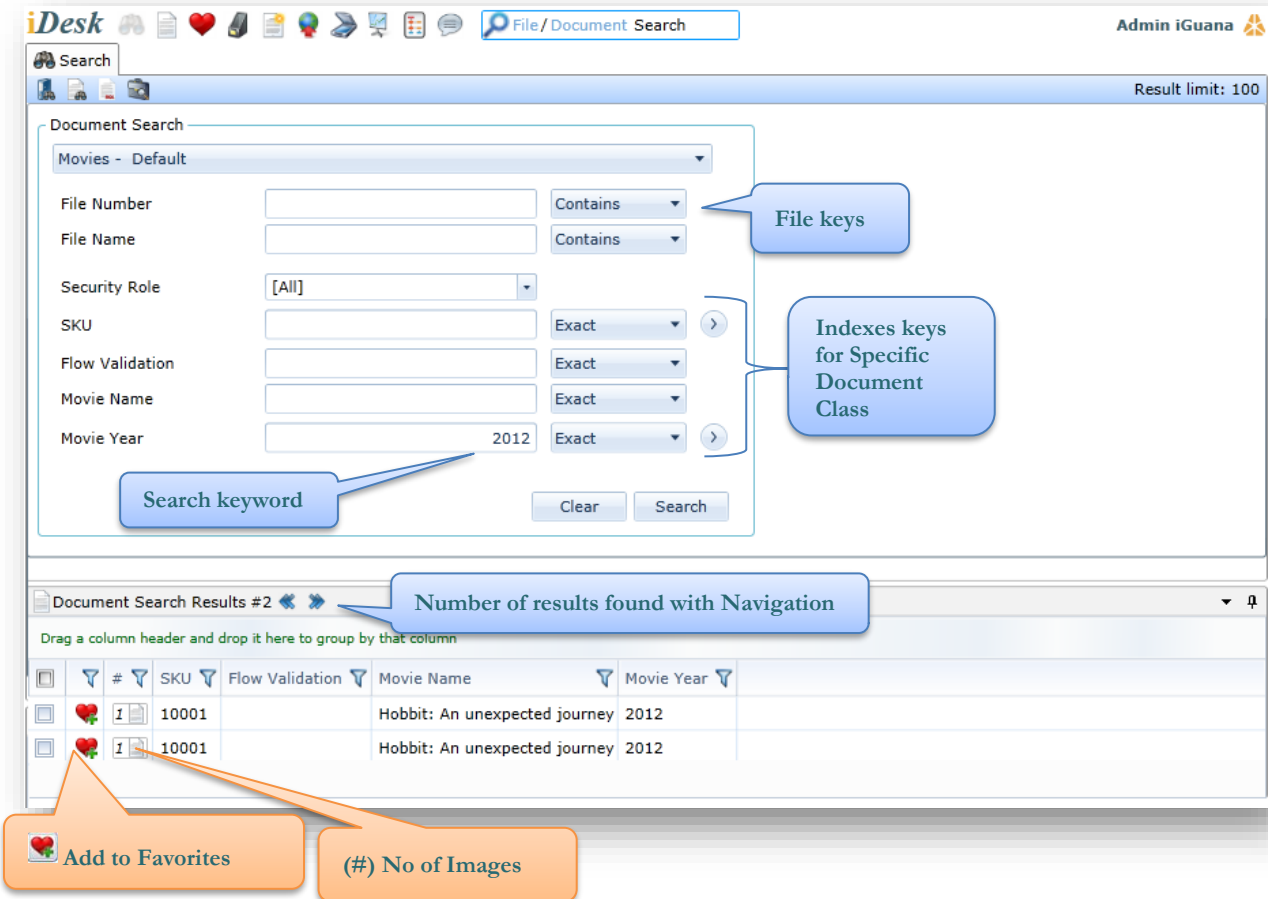


Figure 6- Document Search

Flow icon on Results

On the Document Search Results, there is the iFlow icon. When is enabled it means that there is a flow associated with this flow. You can **click** on it, and It will **redirect** you the **flow** that is currently running.

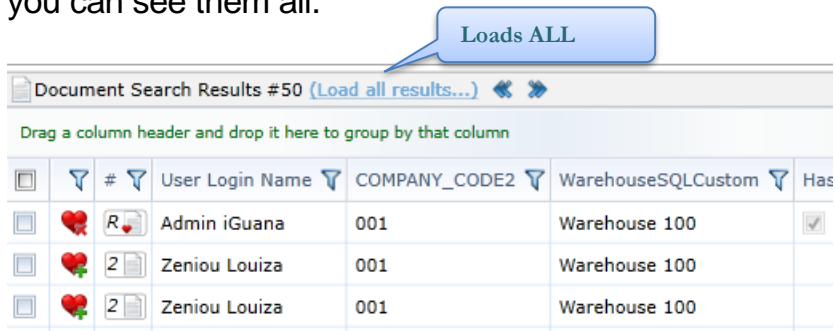
Document Search Results #100 (Load all results...)

Drag a column header and drop it here to group by that column

			Flow	File Number	INVOICENAME	INVOICEAMOUNT	NavisionID	Document Type
		1	1	-1	second	800		ORIGINAL
		1	0		second	800		ORIGINAL

Load all results, on Document Search

If the results are more than the Limit, you get a Load All results button on the Grid, so you can see them all.



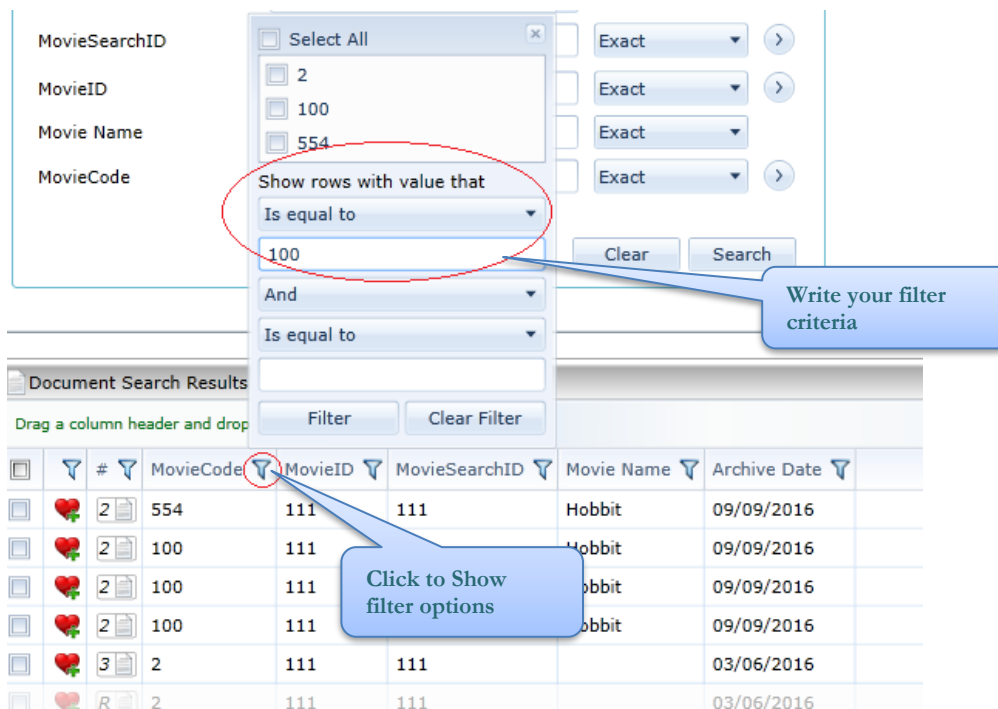
Document Search Results #50 (Load all results...)

Drag a column header and drop it here to group by that column

	#	User Login Name	COMPANY_CODE2	WarehouseSQLCustom	Has
	1	Admin iGuana	001	Warehouse 100	<input checked="" type="checkbox"/>
	2	Zeniou Louiza	001	Warehouse 100	
	2	Zeniou Louiza	001	Warehouse 100	

Filtering on Grid (Persistent)

You can filter the results from the Filter icon that is next to each column. You can make a selection from the List it gives you, or you can write a filter based on criteria. If you write your filter, then the filtering is persistent. Which means that after you login to iDesk, it keeps the same filtering.



MovieSearchID

MovieID

Movie Name

MovieCode

Select All

2

100

554

Show rows with value that

Is equal to

100

And

Is equal to

Exact

Exact

Exact

Exact

Clear

Search

Write your filter criteria

Document Search Results

Drag a column header and drop

Filter

Clear Filter

	#	MovieCode	MovieID	MovieSearchID	Movie Name	Archive Date
	2	554	111	111	Hobbit	09/09/2016
	2	100	111		Hobbit	09/09/2016
	2	100	111		Hobbit	09/09/2016
	2	100	111		Hobbit	09/09/2016
	3	2	111	111		03/06/2016
	2		111	111		03/06/2016

Click to Show filter options

SQL Advanced Document Search

This is an advanced SQL search that builds search rules based on AND / OR conditions, like the example below:

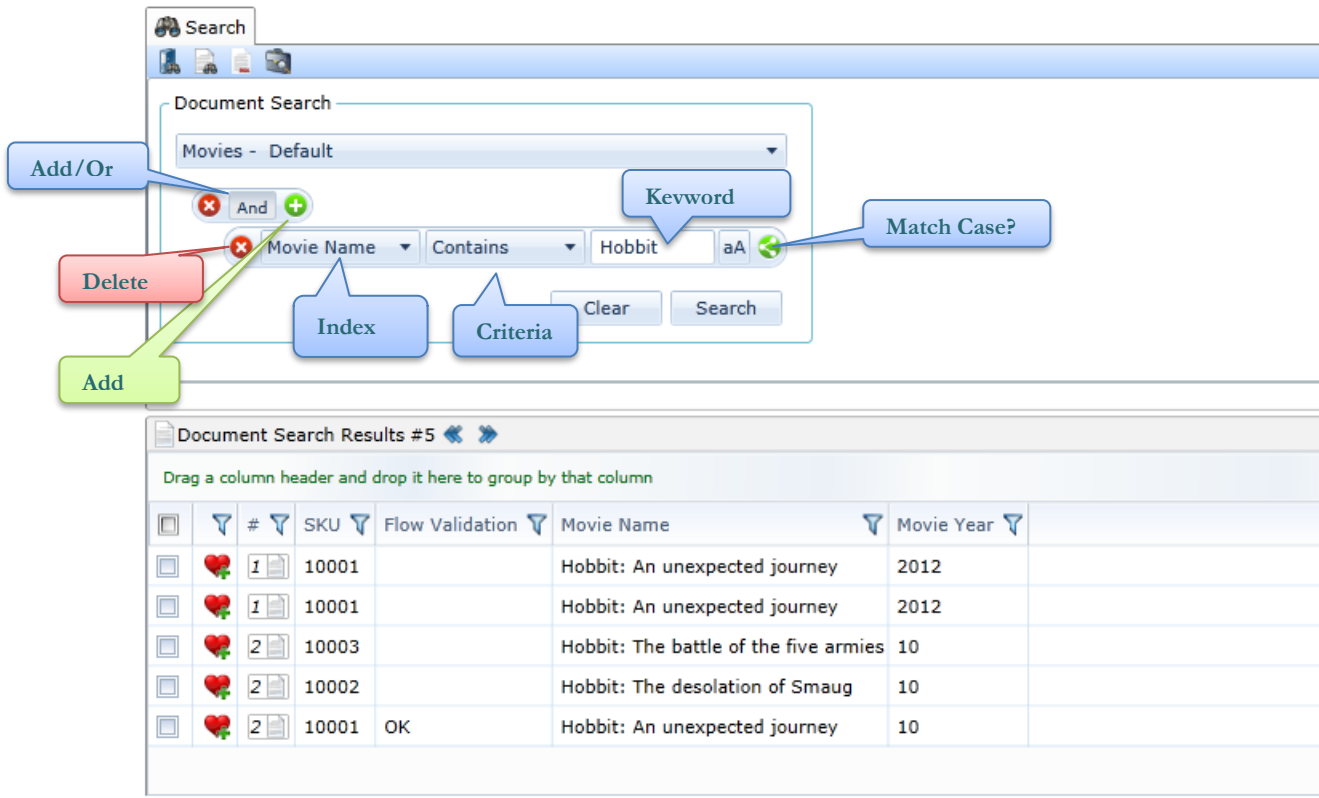
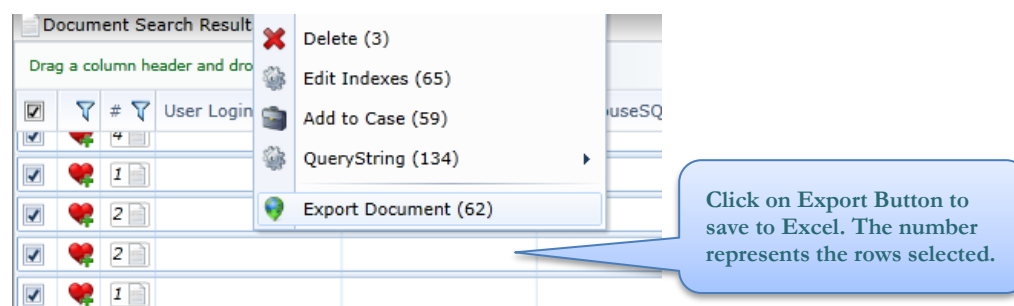


Figure 7- Sql Advanced Search for Documents

Click on **Search**, to Find the results based on the Criteria you have built.

Export to Excel Button on Grids


You have the ability to export the Document Search results by selecting one or more rows of the results and then right click on the grid



You will be asked to save in a zip the pdf files.

Favorites

The Favorites function grants you quick access to documents that have been added to your favorites.

After we **searched** for the Files or Documents we click on the heart icon  and this will be marked as favorite.

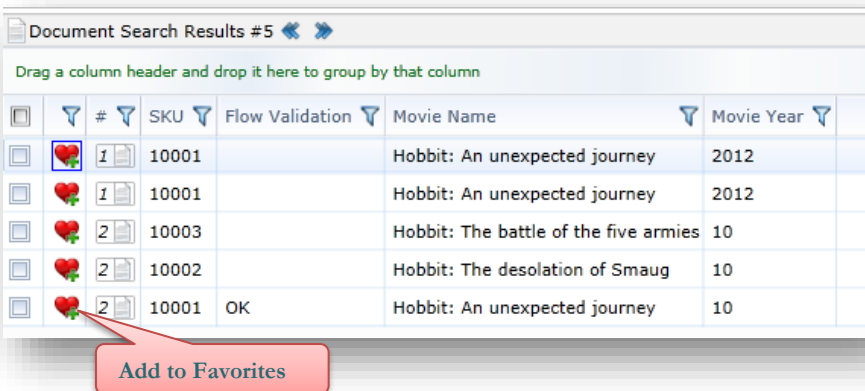
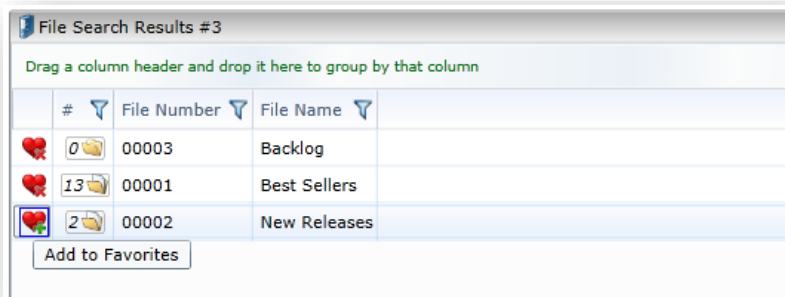


Figure 8 – Add Favorites from Search results

After Adding a Favorite it will appear in your main screen now every time you open idesk.

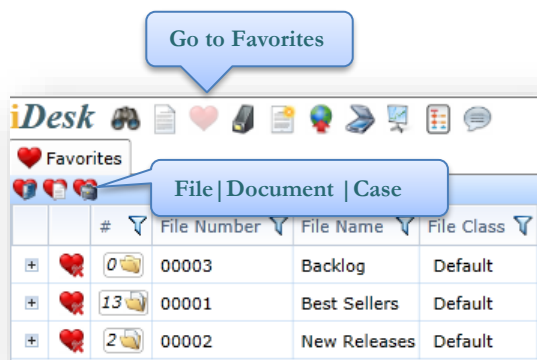



Figure 9 –Favorites added for easy access to files or Documents

Working with Documents

Now that we know how to **search** and find files or documents, and even how to mark them as **favorites**, let's see how we work with documents.

Select on one of your favorites added, and click on the Documents icon. 

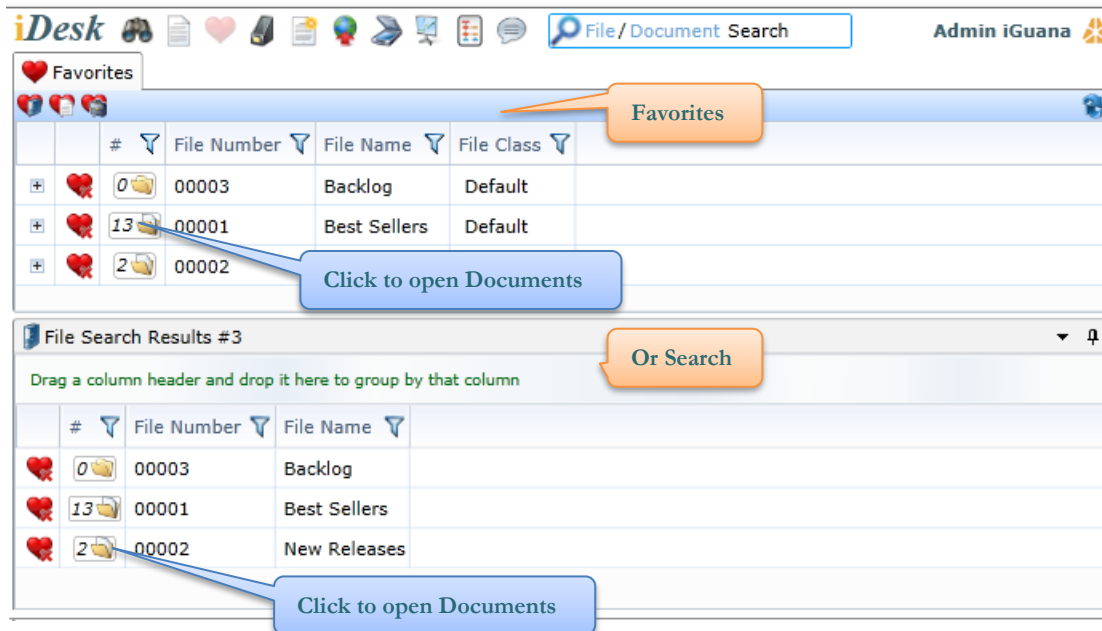


Figure 10- Documents

You will see now that the **Tree structure** of the Selected **File** (i.e. 00001) with its **documents**.

The screenshot displays the iDesk interface with the following components and callouts:

- File Tree Documents:** Points to the '00001-Best Sellers' folder in the File Tree.
- Shows Log:** Points to the 'File Information' tab.
- Documents Header:** Points to the 'Default' header in the File Information section.
- File Information:** Points to the 'File Number *' and 'File Name *' fields.
- Files found:** Points to the 'File Search Results #3' button.
- File Logging:** A separate window showing a table of file activities.

File Logging Table:

Logging Date	User	Action Name	File
15/03/2013 01:44	Admin (Allgeier)	File View	00001
15/03/2013 01:44	Admin (Allgeier)	File View	00001
15/03/2013 01:43	Admin (Allgeier)	File View	00001
15/03/2013 01:43	Admin (Allgeier)	File View	00001

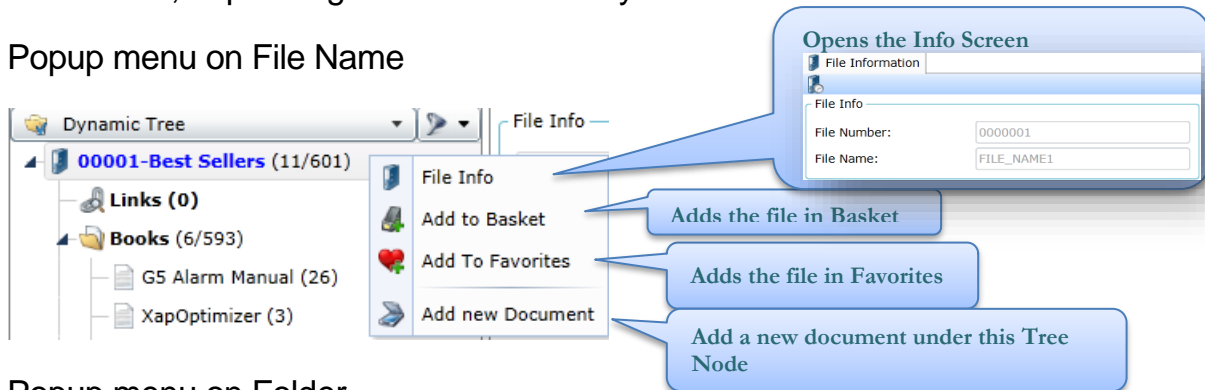
Figure 11 – Tree Documents Structure

Popup Menus (Tree)

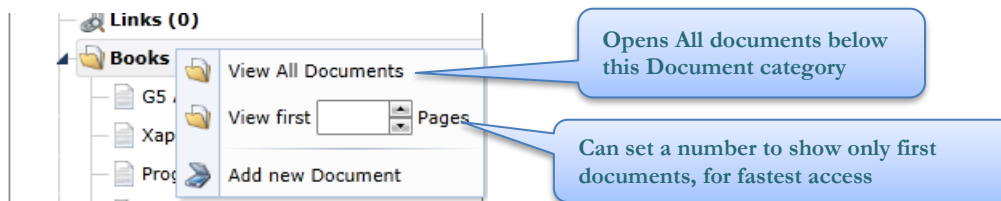
Popup Menus on Tree

If you right click on the Tree we have pop-up menus for easy access to various commands, depending on the Tree-node you click.

Popup menu on File Name



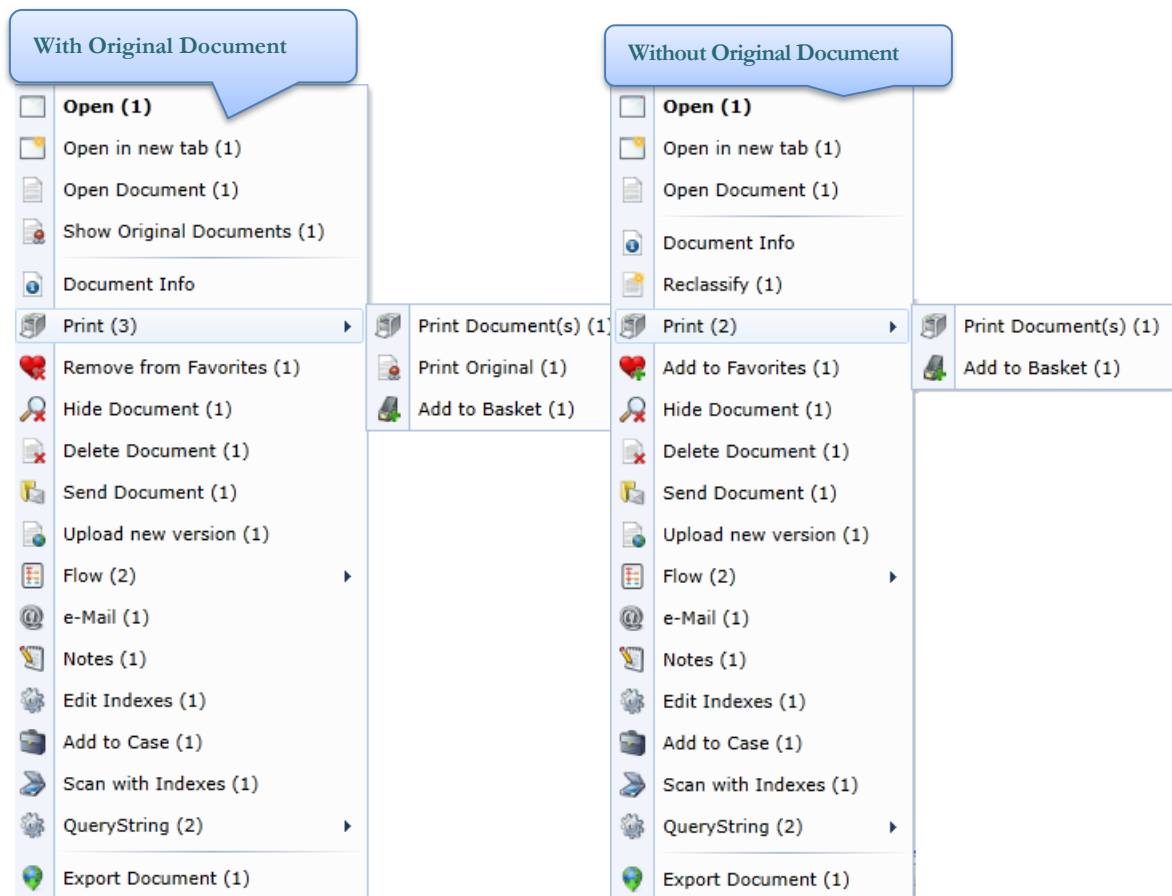
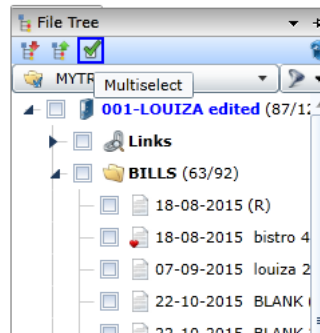
Popup menu on Folder



Popup menu on Document

When your right click on the File Tree, or on the Document search results, you can see various functionalities you can do for your documents.

You can either select a document from the Tree, or from the Search results. You can also use the multiselect option from the File Tree.

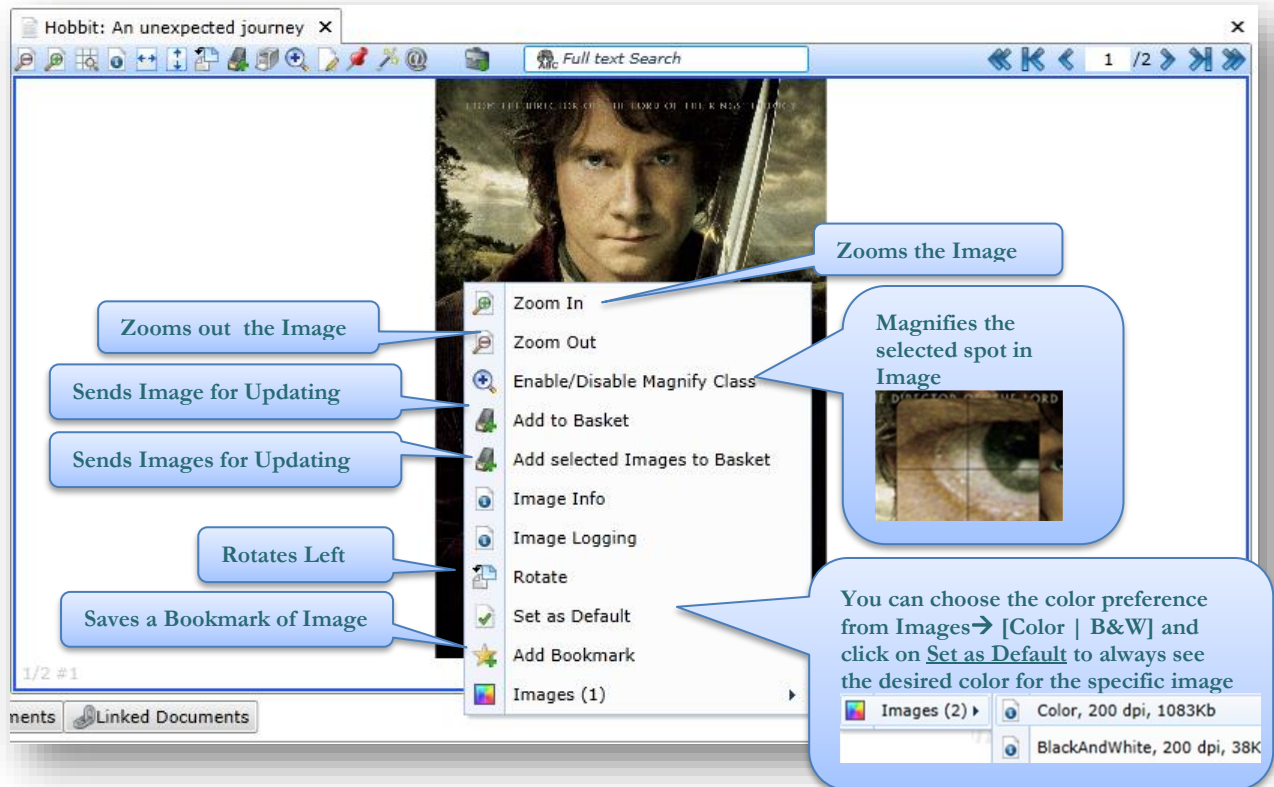


Note: Check next Page for Explanation of Each Menu Command

Command	Description
1. Open	1. Open (as per Default Behavior in Document Class)
2. Open in new Tab	2. Open in New Tab (as per Default Behavior in Document Class)
3. Open Document	3. Open in Viewer
4. Show Original Documents	4. Open Original
5. Document Info	5. Shows Logging Information of Document
6. Reclassify Document	6. Reclassifies Document to another Document Class
7. Print→ Print Documents/Print Original/Add to Basket	7. Sends Document to Printer / Send to Printer the Original Document/ Sends to Basket for Updating
8. Add / Remove Favortes	8. Adds or Removes Document to Favorites.
9. Hide Document	9. Hides Document / Stays in Grid but in gray color
10. Delete Document	10. Deletes Document (sends to iManage for permanent deletion)
11. Send Document	11. Sends Document to Internal iGuana Users for Review
12. Upload new Verison	12. Allows you to upload a new Doc. as a New version of existing
13. Flow	13. Sends it to the iFlow for reviewing
14. e-Mail	14. Sends document to Email recipients
15. Notes	15. Adds/ Edit Notes
16. Edit Indexes	16. Allows you to edit the Indexes
17. Add to Case	17. Adds it into a Case
18. Scan with Indexes	18. Allows you to scan / upload a New Doc with the same Indexes
19. Query string	19. Copies in clipboard the query string of selected document
20. Export Document	20. Allows you to download the Original Document

Pop Up Menu (Document Viewer)

You can right click on a specific Image to do specific functions as follows:



Tab Windows

General

When we open a function in iDesk, like Search, Basket, File Tree etc.. several tabs are opened that are related to those functions and the item we have opened.



File / Left Tabs

<p>File Info</p> <p>Default</p> <p>File Number * 00001</p> <p>File Name * Best Sellers</p>	Shows the Information about the Selected File
<p>File Notes</p> <p>Created by Admin (Allgeier) MedView on 15/03/2013</p> <p>This customer has discount</p>	You can view , edit Notes regarding the File.
<p>Case Tree</p> <ul style="list-style-type: none"> Case 001 (2/7) <ul style="list-style-type: none"> 001-LOUIZA (2/7) <ul style="list-style-type: none"> BILLS (2/7) <ul style="list-style-type: none"> 31/12/2015 (1) 18/08/2015 (6) 	Shows in a Tree diagram, The Files/ and Documents below each file that have been added to a Case.
<p>File Tree</p> <p>Dynamic Tree</p> <ul style="list-style-type: none"> 00001-Best Sellers (12/602) <ul style="list-style-type: none"> Links (0) iFile Classes <ul style="list-style-type: none"> WHAREHOUSE A MedView Books (7/594) <ul style="list-style-type: none"> fifty (1) G5 Alarm Manual (26) XapOptimizer (3) Programming Scala (226) 	Shows in a Tree diagram, The Documents below each file. The Tree hierarchy is designed in iManage.

Document / Right Tabs

iDesk Admin iGuana

File / Document Search

Seven Languages in Seven Weeks X

Full text Search 1 / 336

Shows general Information of the Document. You can edit the index values, if you are authorized to do so.	Document Info Movies - Default SKU * 10001 Flow Validation OK Movie Name * Hobbit: An unexpected journey Movie Year * 10	Document Info									
Shows the Versions available and you can view or download the original document of each version.	Document Versions Drag a column header and drop it here to group by that column <table border="1"> <thead> <tr> <th>#</th> <th>Date</th> <th>Version</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>21/07/2015</td> <td>1.0</td> </tr> <tr> <td>2</td> <td>11/01/2016</td> <td>2.0</td> </tr> </tbody> </table>	#	Date	Version	1	21/07/2015	1.0	2	11/01/2016	2.0	Document Versions
#	Date	Version									
1	21/07/2015	1.0									
2	11/01/2016	2.0									
Shows helpful Notes, you can add, edit delete.	Document Notes Created by Admin (Allgeier) MedView on 15/03/2013 This document must be printed urgently!	Document Notes									
Shows the iFlows associated with this document	Document Flows <table border="1"> <thead> <tr> <th>ID</th> <th>Name</th> <th>Start</th> <th>Deadline</th> </tr> </thead> <tbody> </tbody> </table>	ID	Name	Start	Deadline	Document Flows					
ID	Name	Start	Deadline								
Shows the bookmarks of images if any. You can delete the bookmark or go directly to the bookmarked image.	Bookmarks <table border="1"> <thead> <tr> <th>Description</th> </tr> </thead> <tbody> <tr> <td>19/01/2016 10:38:36</td> </tr> </tbody> </table>	Description	19/01/2016 10:38:36	Bookmarks							
Description											
19/01/2016 10:38:36											
Shows if there is any iFile Location, and you can edit the Indexes.	Document Location WHAREHOUSE A Warehouse Number * 111	Document Location									
Shows the Original Documents associated. You can download and review them.	Documents <table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr> <td>Seven Languages in Seven Weeks.pdf</td> </tr> </tbody> </table>	Name	Seven Languages in Seven Weeks.pdf	Documents							
Name											
Seven Languages in Seven Weeks.pdf											

1/336 #1

File Search Results #3 Related Documents Linked Documents

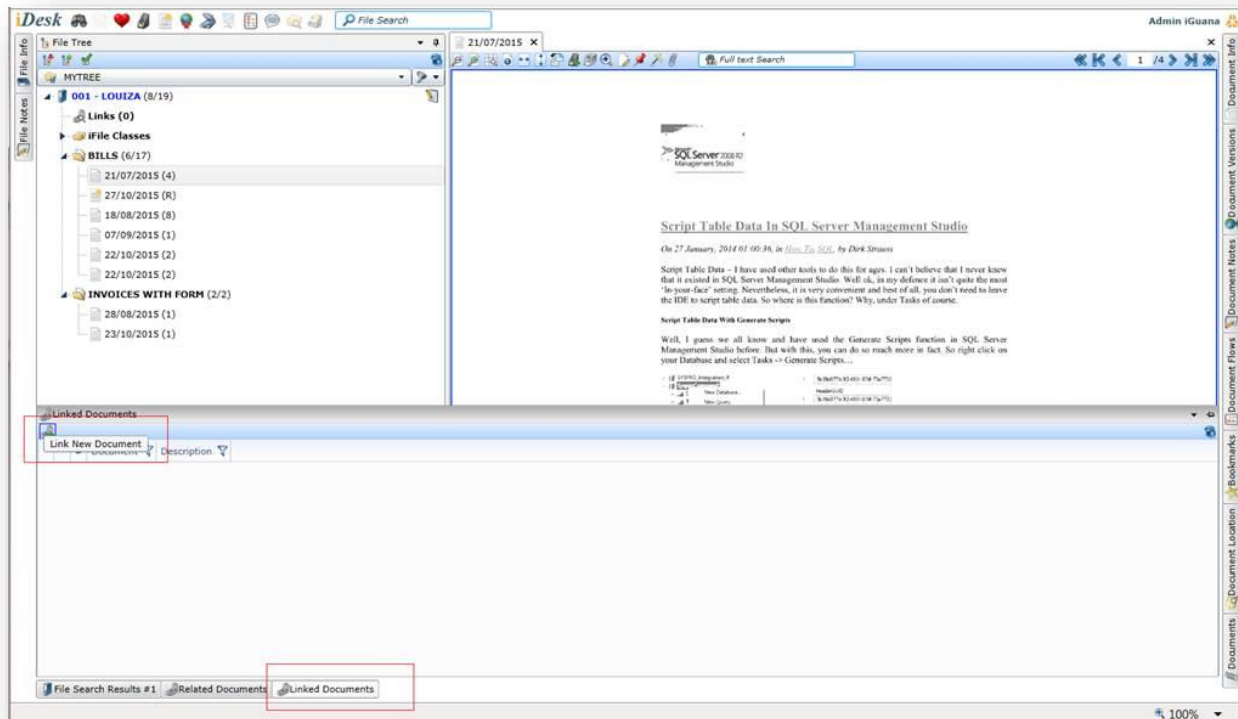
Linked Documents

To view / add Linked Documents do the following:

Open iDesk

Choose a Document to work with.

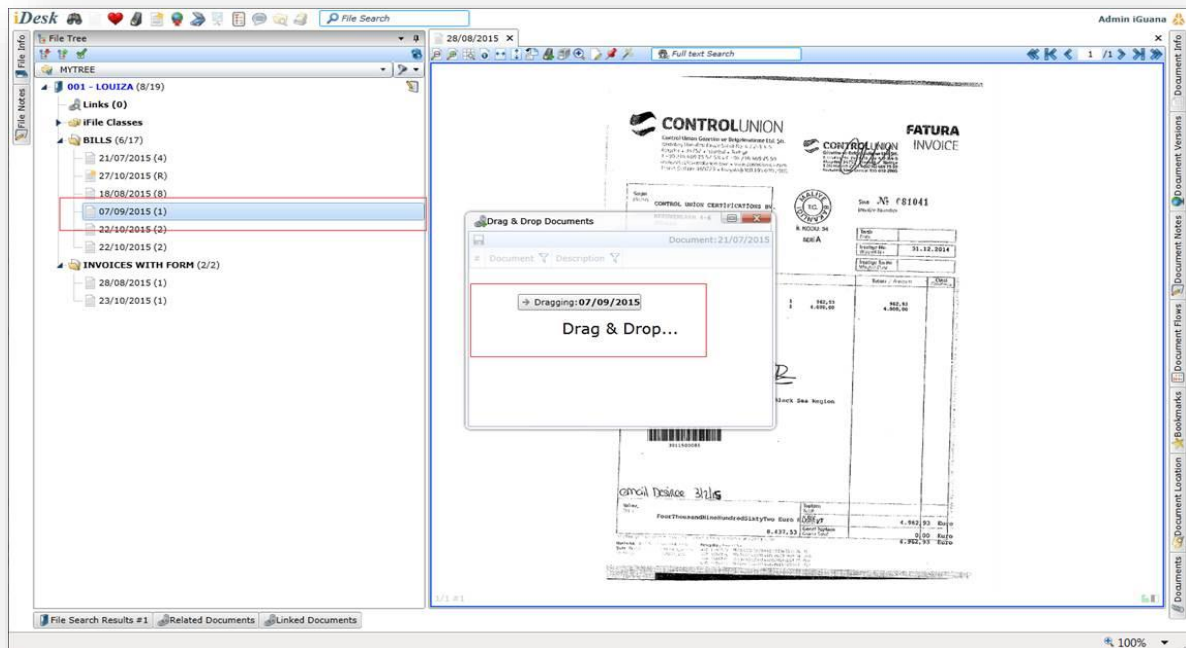
Click Below the **Linked Documents Tab**, to see the Grid of Linked Documents.



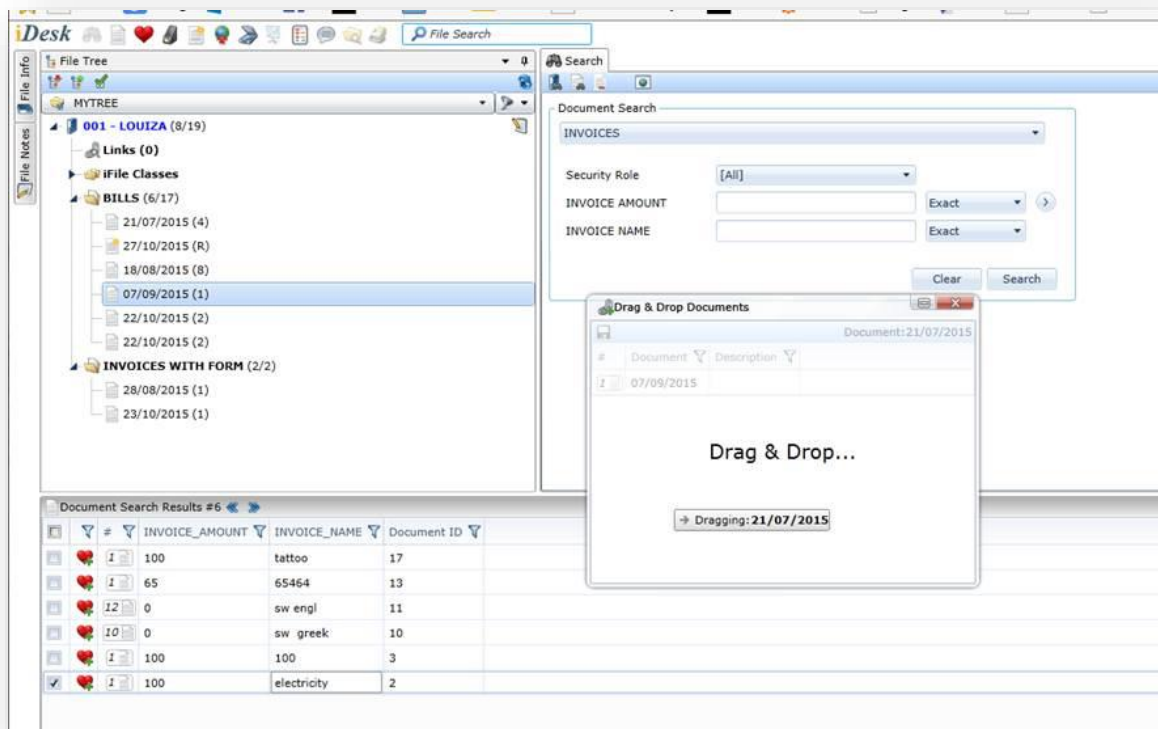
To add a new, click on the **Link New Document** Button, and you will see a Popup.

In that Popup you can drag and Drop Documents choosing either from the Tree, or From search Results.

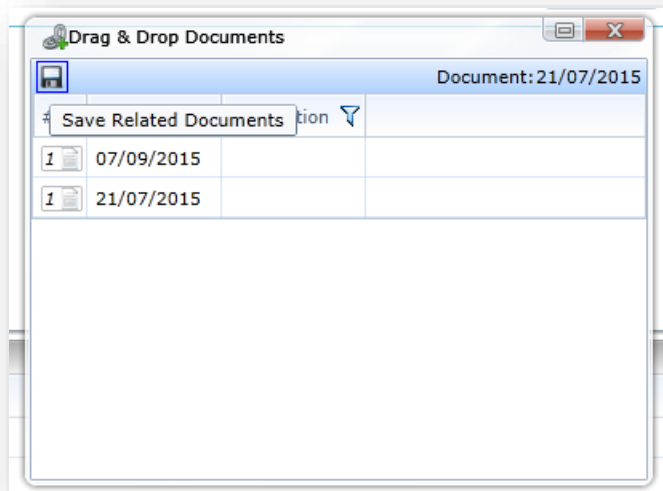
Drag and Drop From Tree



Drag and Drop From Search Results

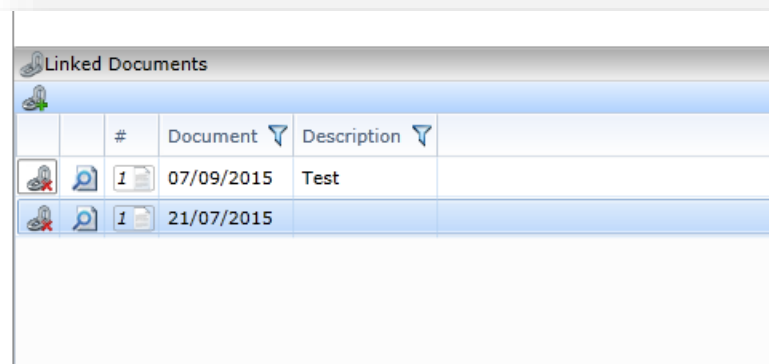


Save the Related Documents,, you can Add **Description** if you wish, just edit directly in the Grid.




And then when you go again to the Linked Documents Grid, you can see them there.

You can **view** the Document, change **description**, or **unlink** it.

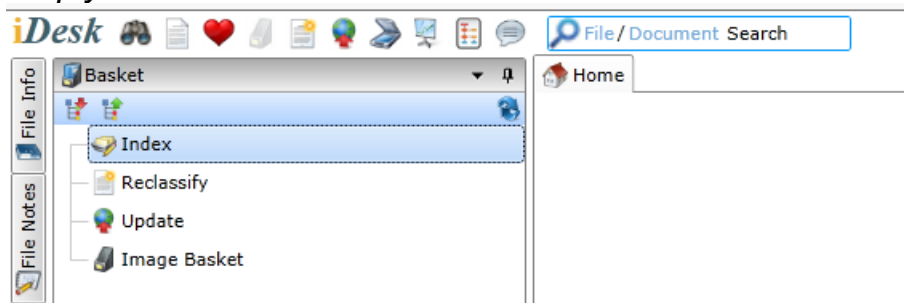


Basket

The basket function lets you access items (images or documents) that you added to the basket for functions such as Reclassifying, Versioning, and Managing Images of a Document.

Click on the Basket icon  from the Toolbar Menu to see the Basket Screen.

Empty Basket



Basket with Added Activities

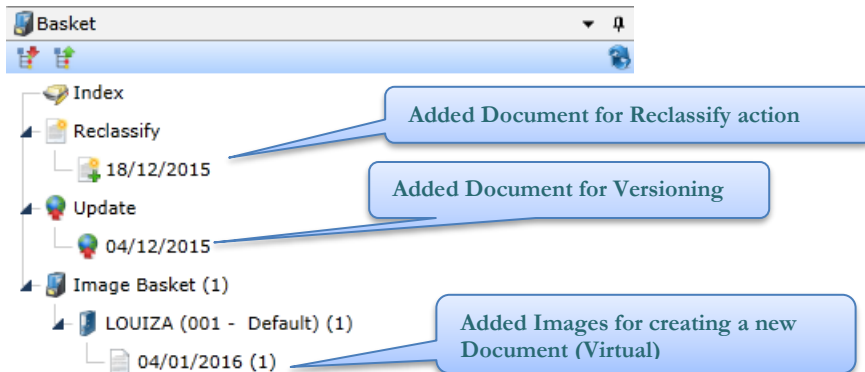



Figure 13 Basket

Add To Basket

As we 've seen in the previous section (working with popups) we can right click on each of our items and add it to the basket with the Basket icon . By this action we are keeping a copy of this items, ready for action like printing.

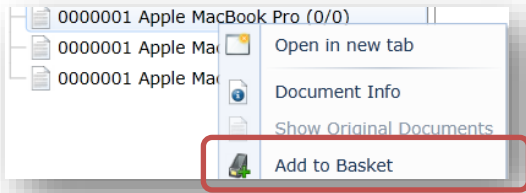
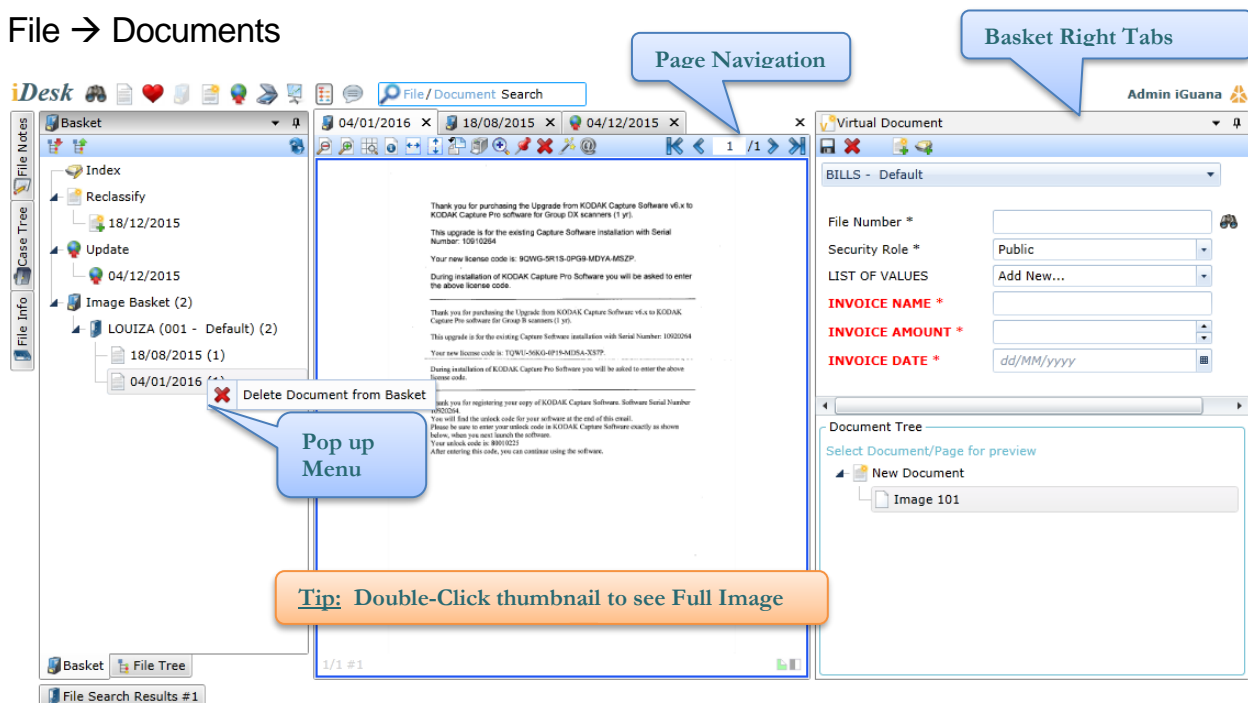


Figure 14- Add to Basket

Preview Basket

Now that we have added items to basket if we click on the Basket icon from the Toolbar menu, we can see the items added in the following hierarchy:

File → Documents



Basket Menu options

If you are in a multi thumbnails view you can see the following options in Basket Menu.

In a Multiple Image view, the Basket menu has different options:

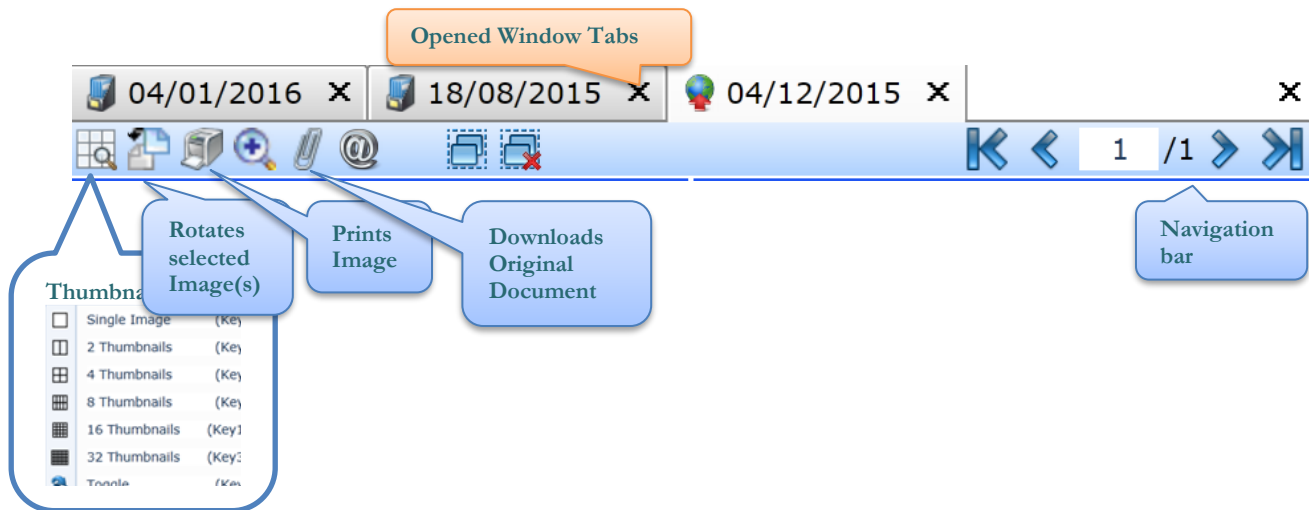


Figure 15 – Basket Menu Options

In a single Image view, the Basket menu has different options:

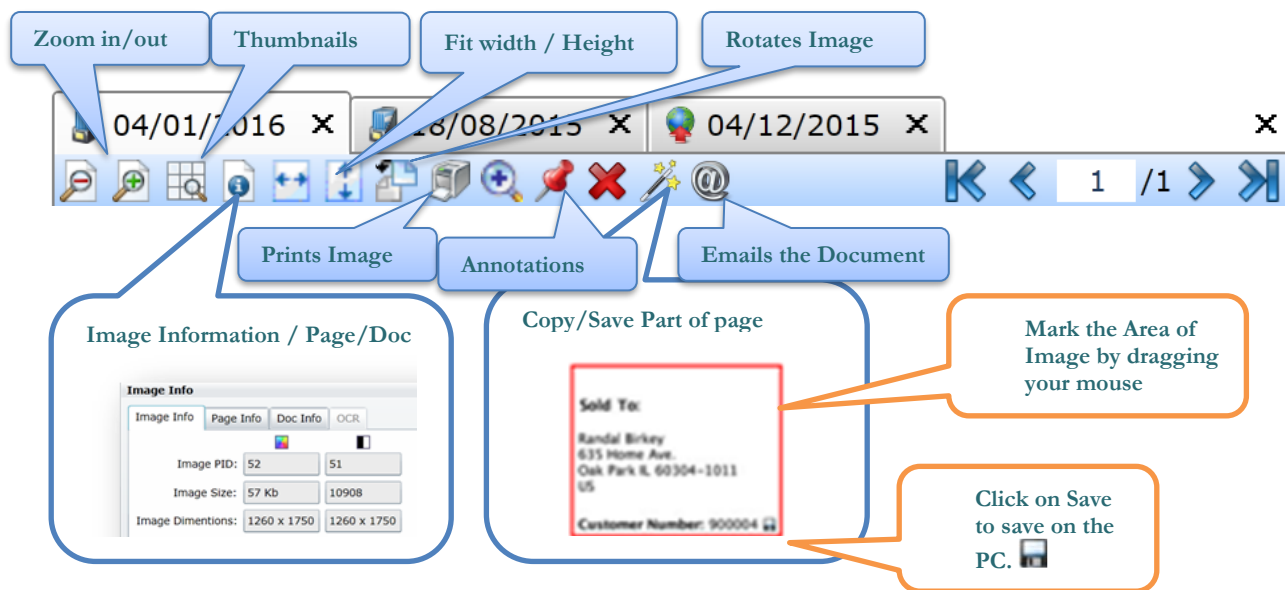
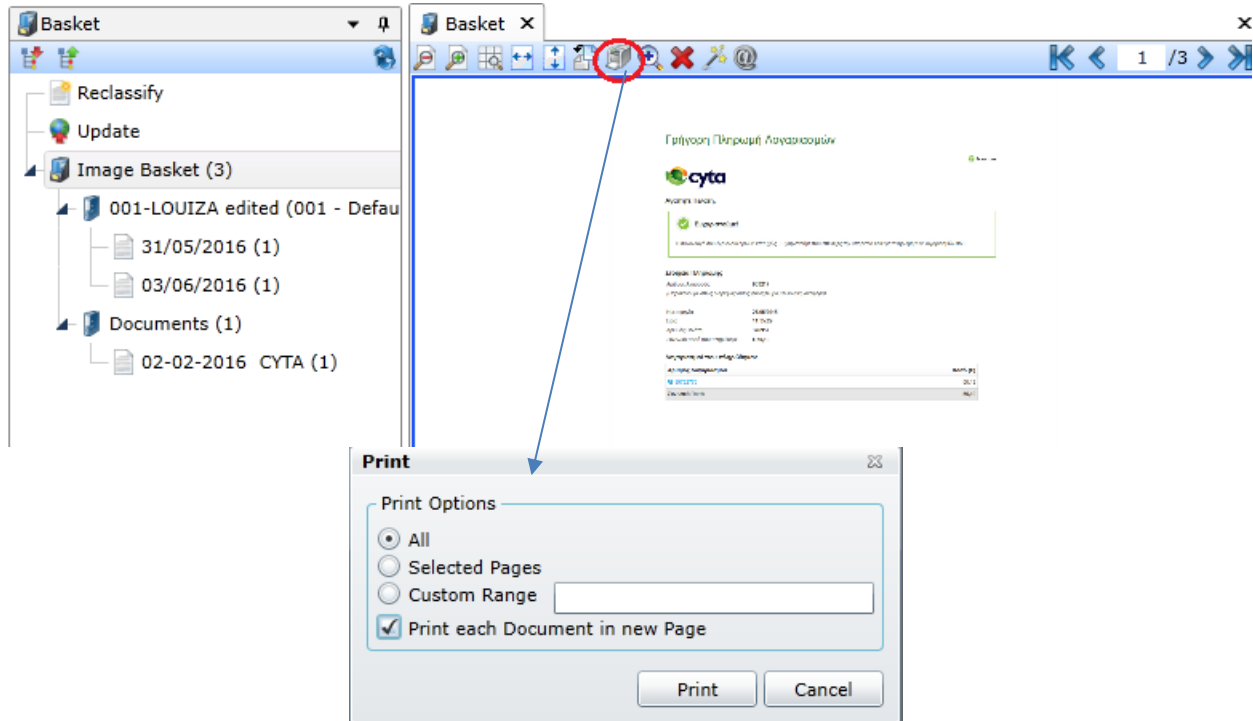


Figure 16- Basket Menu Options (Single Image)

Print in Basket Viewer

You can Print **Documents in new Page** when printing multiple documents. Once you click on Print, having Images from Various Documents, you have some extra Print Options, that allows you to Print in New Page , so you can have separation between the Documents.



Viewing Images

You can view the images simply by selecting the document you are interested in from the Tree Structure pane. The images are then displayed in the right hand pane.

The images can be zoomed in, printed, added to the basket for further actions at a later stage (clicking once on an image selects that image), such as printing or selected individually by double clicking the image for single image viewing.

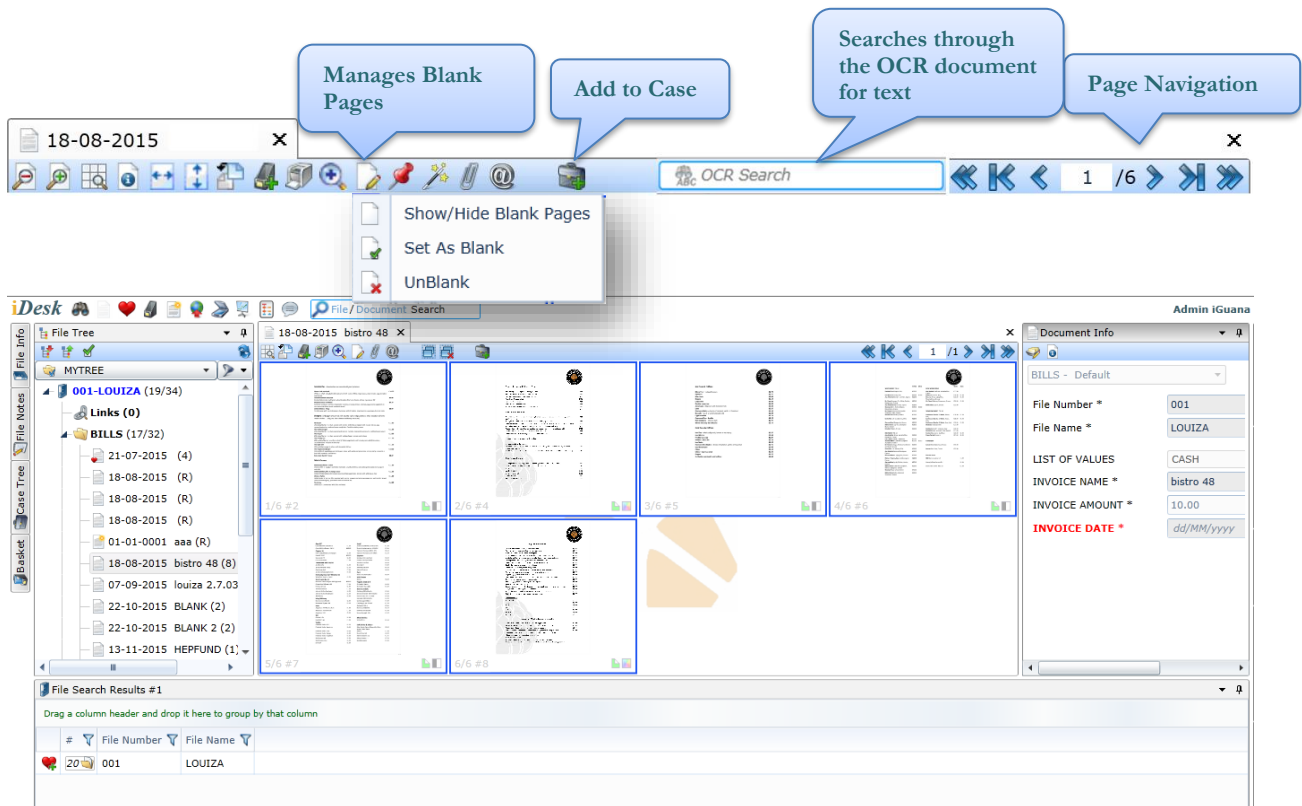
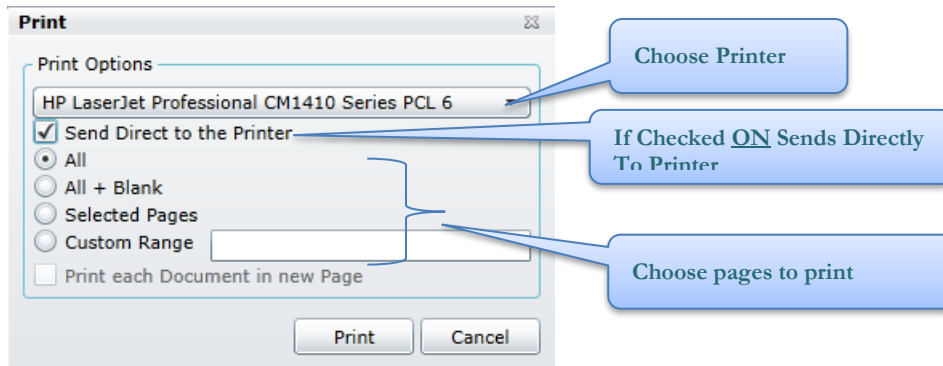
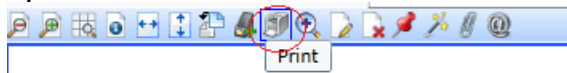


Figure 17 – Image Viewing

Print in Document Viewer

Click on the Print Button from the Menu and choose from the Print Dialog the desired options



Annotations

Annotations can be accessed in the single image view mode. They are a useful tool for adding notes, stamps or free text to any image.

The annotations have two groups: **Personal**, where only the user who added the annotations can view them and **Global** where the annotations are viewable by anyone.

To access the annotations functions just click on the red pin and select to show Personal or Global annotations.

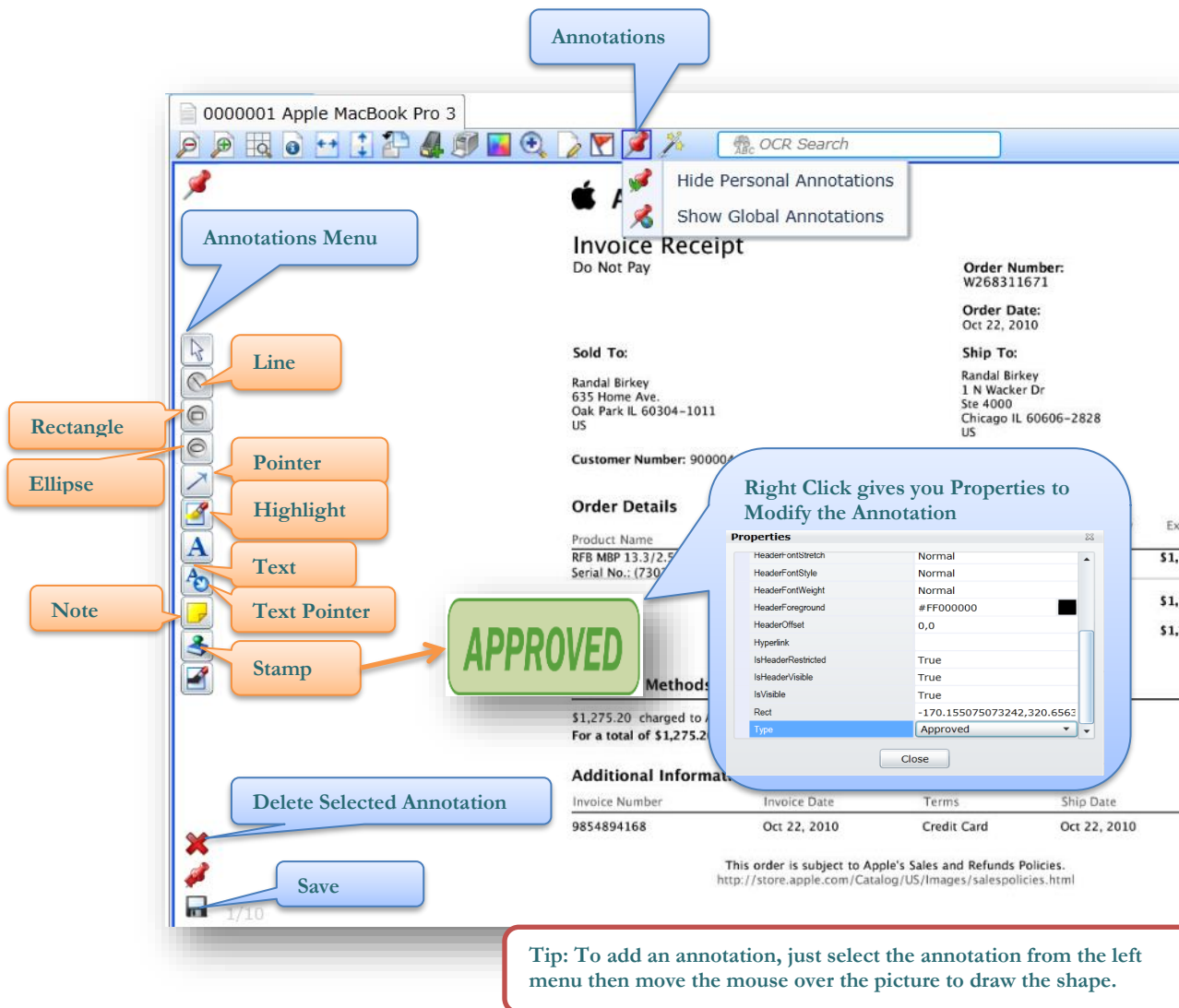


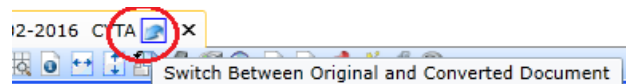
Figure 18- Annotations

Viewer and PDF viewer

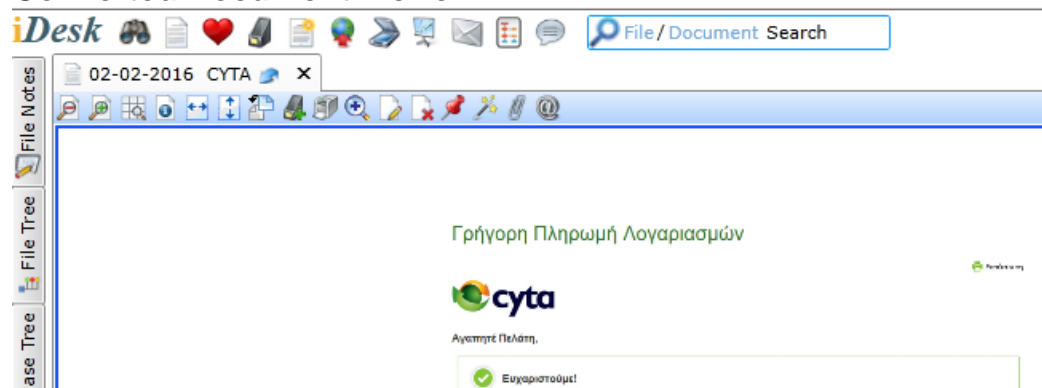
If a Document has an original Document, then you can have two different views:

Converted Document and **Original Viewer**.

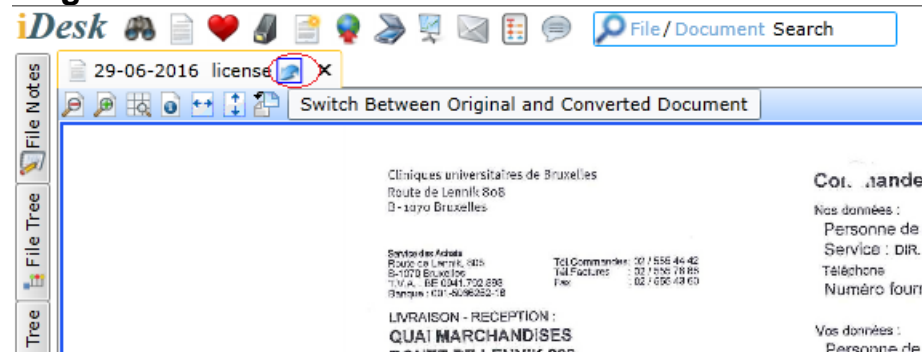
And you can swap between the two with the button as shows in picture below:



Converted Document Viewer

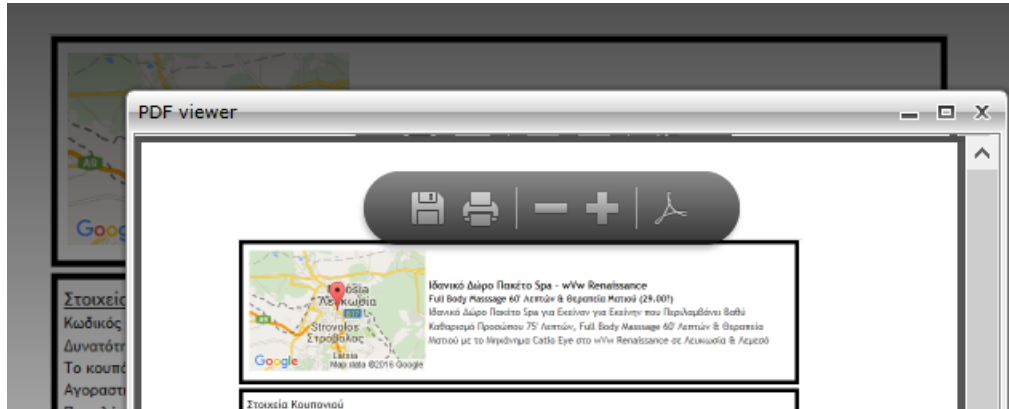
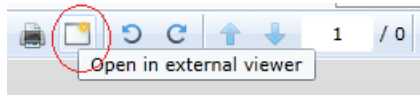


Original Viewer



External Viewer


For PDFs only, you can also click on the button Open in External Viewer and you can work with your document as if you opened it from your Machine's Default PDF program.



Preregister Document

Preregister Documents are the Documents that are registered to the system as entity **before the scanning** takes place. It's like a **preparation** of the Document, but since it is not scanned yet it does not contain physical pages, **thus does not contain images** either.

View Preregister Documents

To access these documents, click on the Preregister Document button  from the Toolbar menu.

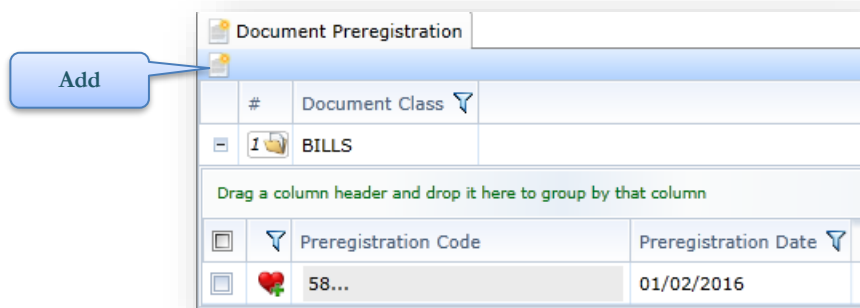


Figure 19- Preregistered Documents Grid

Add Preregister Document

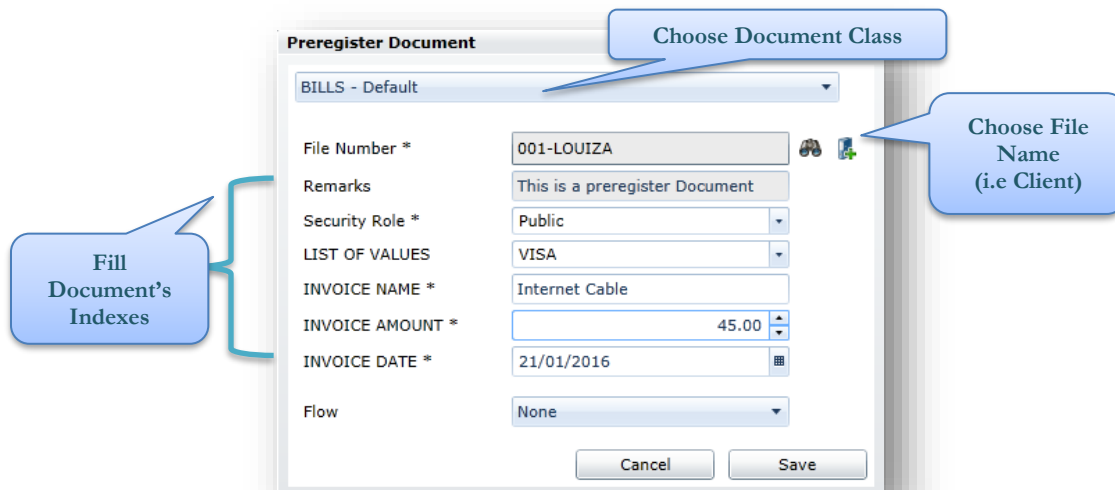

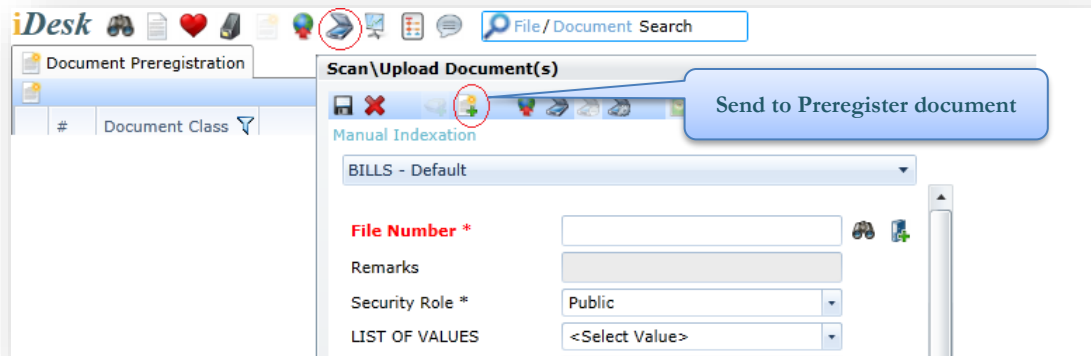


Figure 20- Preregistered Documents

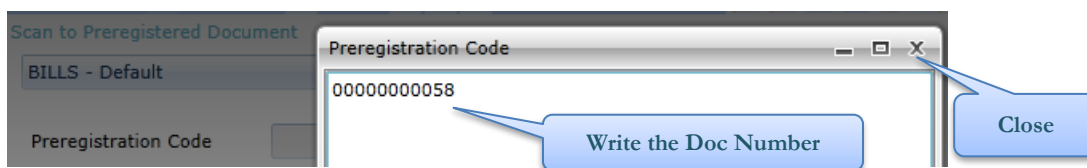
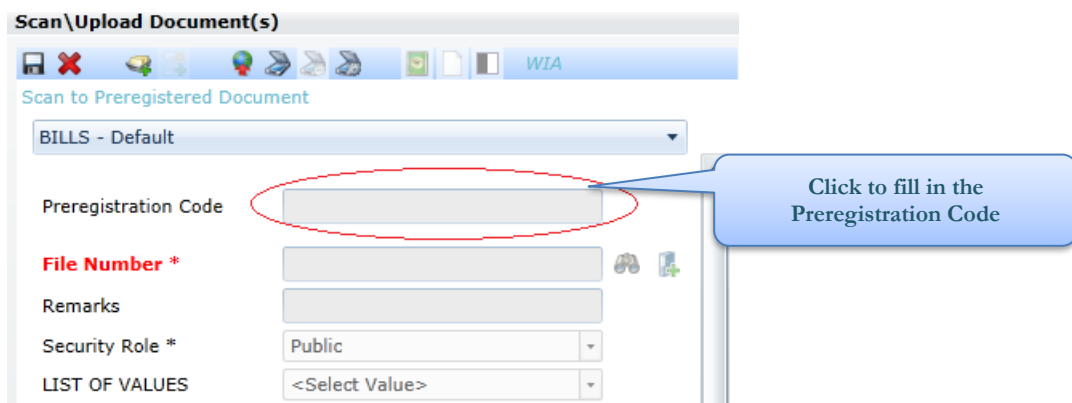
Scan to Preregister Documents


Once the Preregister Documents are prepared, they can be used when you use the scan command from iDesk. So the empty template now will have an instance with images.

Click on Scan from the Top menu, and then click on  Scan to Preregister Document.



Then you will be asked to put the Preregistration Code, which is the Document Number



Then the Indexes are prefilled based on the Preregistration code, and after you put the images, you can click on **Save**  and the Document will be saved.

The screenshot displays the WIA interface for document upload and processing. The main window is titled "Scan to Registered Document".

Left Panel (Form Fields):

- BILLS - Default** (Dropdown menu)
- Save** (Button)
- Preregistration Code:** 01-01-0001 PREREGISTER BILL
- File Number *:** 001-LOUIZA
- Remarks:** (Empty text field)
- Security Role *:** Public
- LIST OF VALUES:** <Select Value>
- INVOICE NAME *:** PREREGISTER BILL
- INVOICE AMOUNT *:** 10,000.00

Right Panel (Processing Status):

Γρήγορη Πληρωμή Λογαριασμών

cyta

Payment Details

Συναμμογή

Στοιχεία Πληρωμής:

Αριθμός Λογαριασμού	000000
Αριθμός Κόπης	000000
Είδη	000000
Είδος	000000
Αριθμός Κόπης	000000
Αριθμός Κόπης	000000

Στοιχεία Πληρωμής:

Αριθμός Πληρωμής	000000
Αριθμός Πληρωμής	000000
Αριθμός Πληρωμής	000000
Αριθμός Πληρωμής	000000

Bottom Panel (New Document):

- New Document** (Button)
- Image 1** (Image thumbnail)

Annotations:


- Indexes are filled based on Preregistration Code.** (Callout pointing to the Preregistration Code field)
- Images to be saved** (Callout pointing to the Image 1 thumbnail)

Footer:

Select Scanner...

Scan

The Scan is a module that is included in iDesk where you can add documents by scanning them.

Click on the scan button  from the Toolbar menu to access the module.

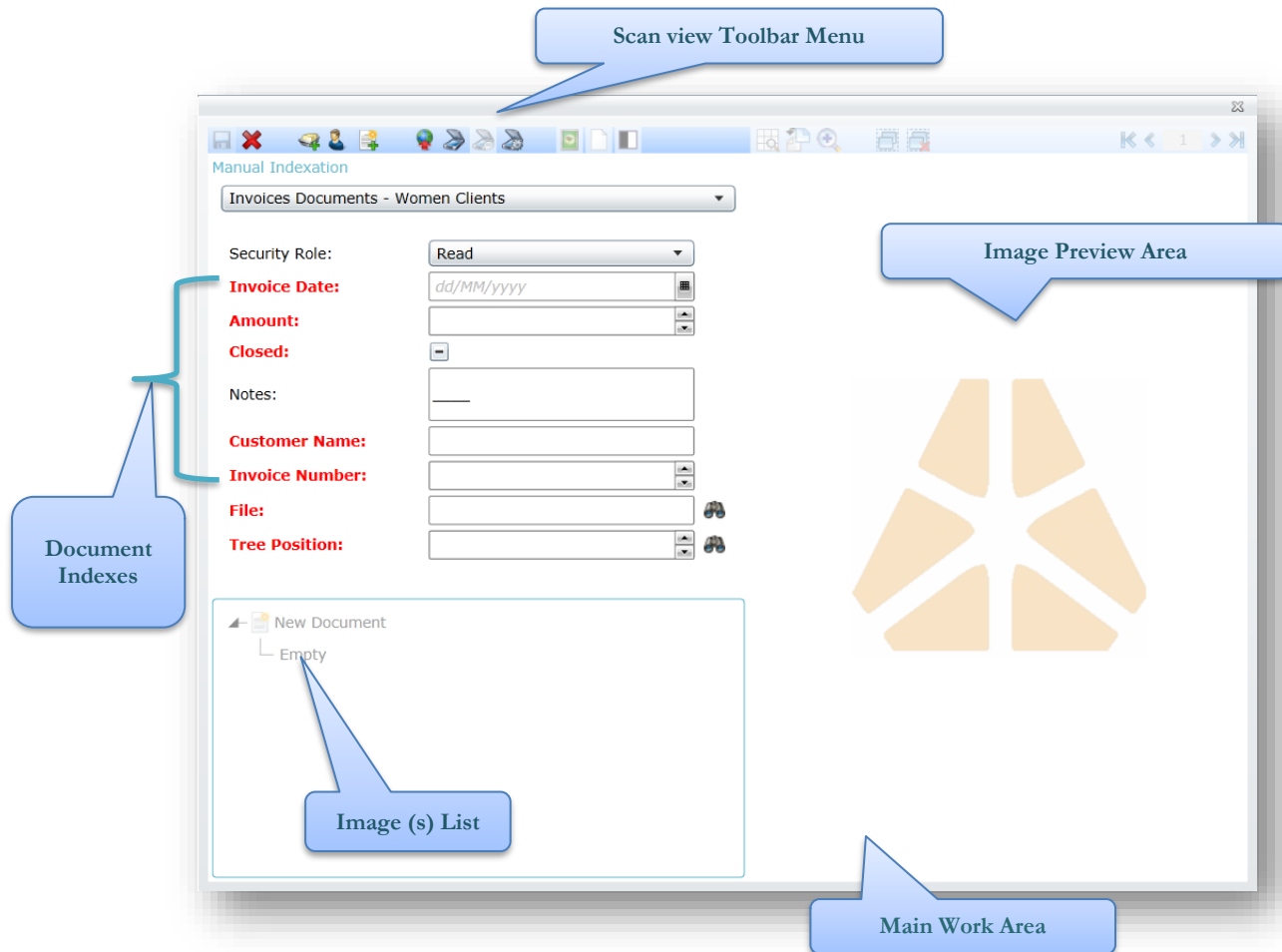


Figure 21- Scan View in iDesk

Scan Toolbar Menu

Let's have a closer look to the iDesk Scan Features.

Toolbar Menu

In the picture below you can see an explanation of the Toolbar buttons.

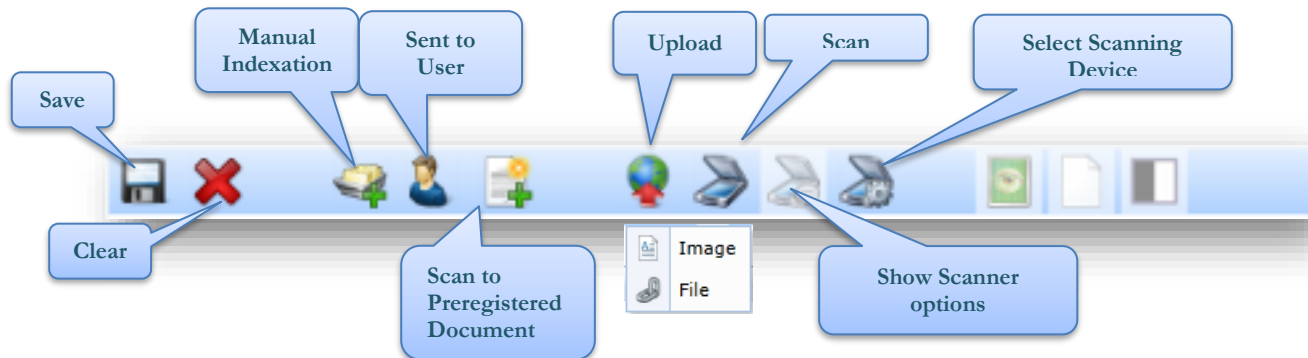


Figure 22 – Scanview Toolbar menu (scanning options)

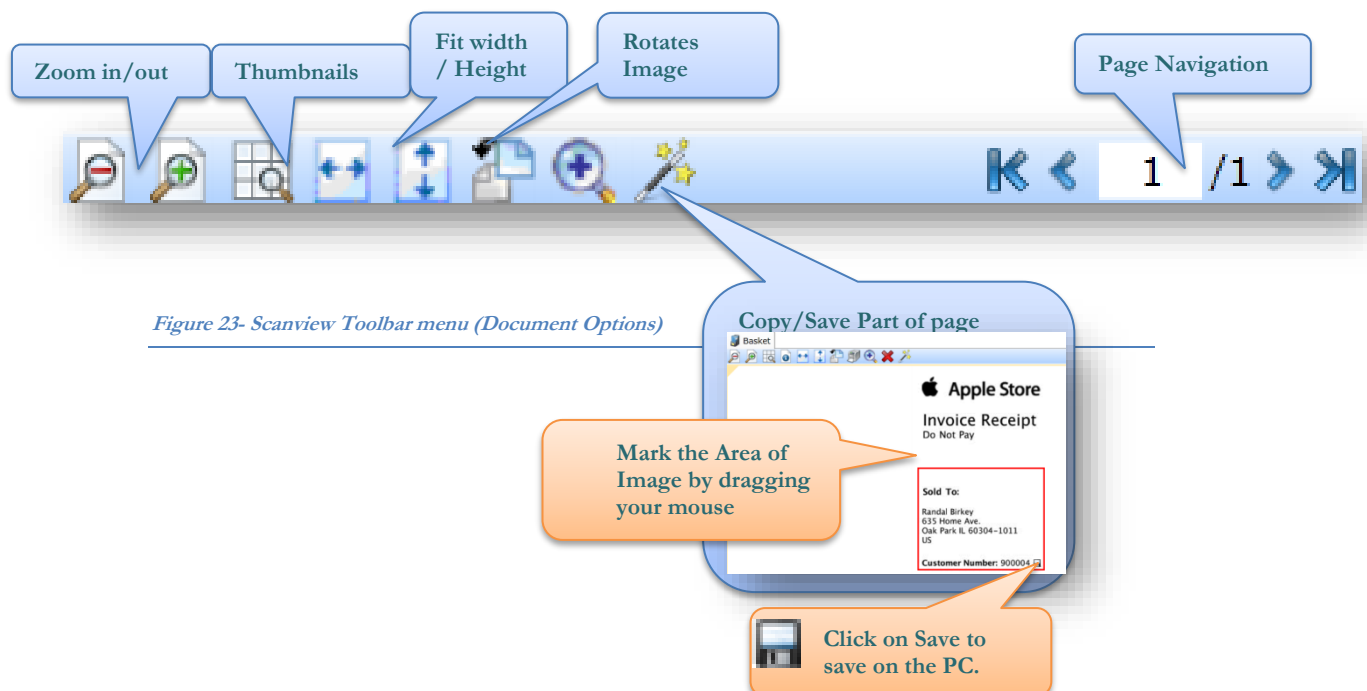

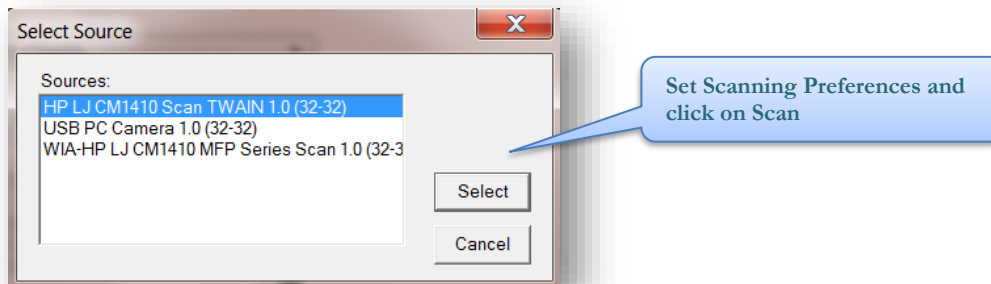


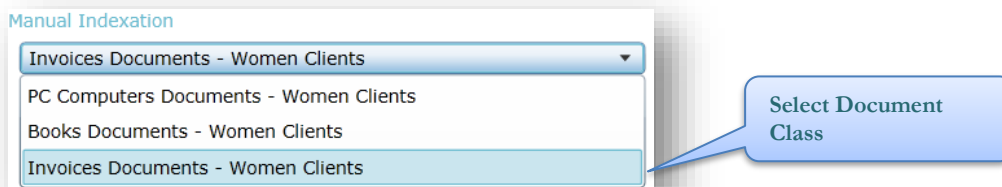
Figure 23- Scanview Toolbar menu (Document Options)


Scanning a Document

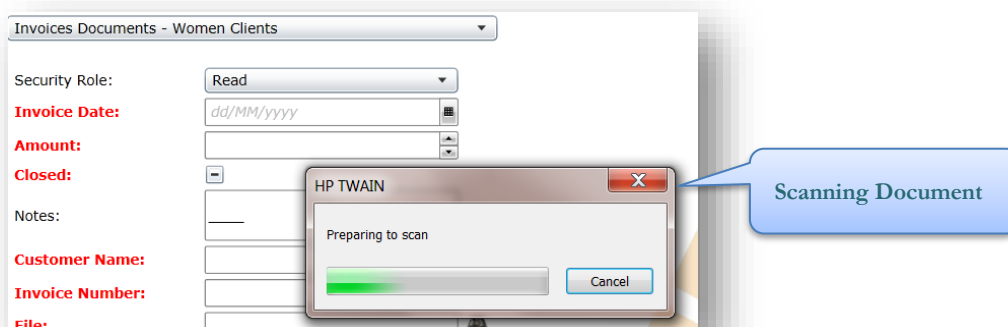
To Scan a Document, first set up the Scanning Options by clicking the  scan settings button and **select** the Scan Source from the window as shown below.




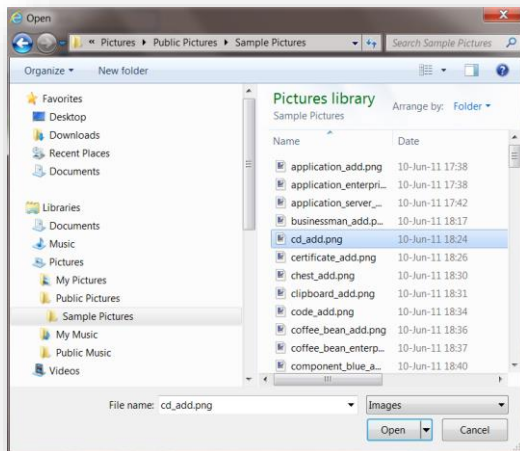
Then Choose the Document Class for the given Document Classes. Automatically it loads the indexes for each class in the Window.



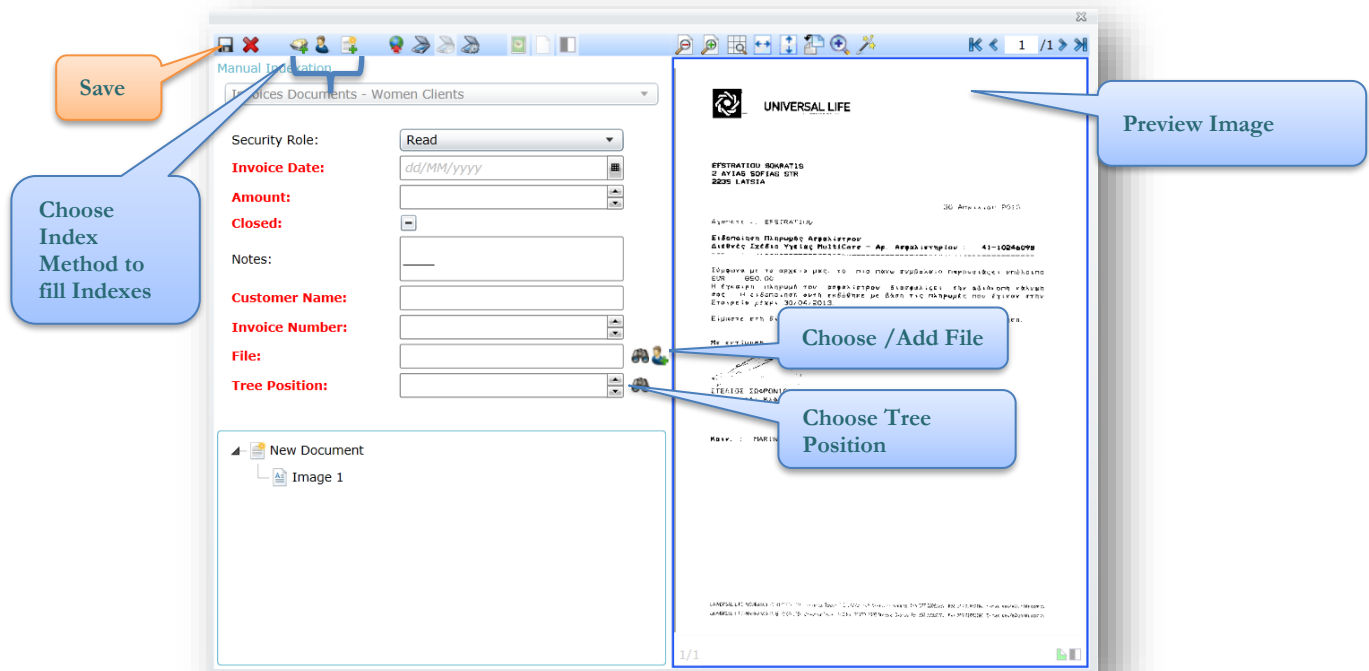
Then press on Scan  to Start Scanning directly from your scan source. You will see that now the system starts scanning the Document you have in your scanner.



You can also upload  a Document instead of Scanning, by pressing the Upload button for the toolbar menu.



Now you will see the Scanned (or Uploaded Document) in the Image preview Area. You should fill the Indexes now, make any necessary changes on the Image, by rotating it, cropping it etc.. and then click on Save to apply the changes.



Indexing a Document

To Index a Document there are three ways:



Manual Indexation

You fill the Indexes as you see them in the screen.

The screenshot shows the 'Manual Indexation' form and the 'Add New File' dialog. The form has fields for Security Role, Invoice Date, Amount, Closed, Notes, Customer Name, Invoice Number, File Number, and Tree Position. The 'Add New File' dialog has fields for Number and Name. Callouts indicate: 'Fill in the Indexes and click Save' pointing to the form, 'Search for File' pointing to the file selection icon, and 'Add New File' pointing to the 'Add New File' button.

Click on **Save** to finish.

Send to User

You direct the Indexation to another user to do it by choose from the list of users.

The screenshot shows the 'Select User' dialog with a list of users. Callouts indicate: 'Choose User to Send to make the Indexing' pointing to the list of users.

Name	Firstname	Email
(pwd: 4gsolut1on)	agsolution	
(pwd: Dyn4nicWork5#)	Dynamicworks	
Admin	Andreas	
Admin	MedView	
Admin (Allgeier)	MedView	
Administrator	ScanFactory	
ALBRECHT	Mathieu	
Andreou	Andreas	
Ates	Ogün	
BARBOTTIN	Kris	
Beck	Kathy	
BEERNAERT	Félix	
Beerten	Peter	
BLANCKE	Mathieu	
BLOMME	Zack	
BOCKEY	David	
BOUCKELLIOEN	Jérémy	

Preregistered Document.

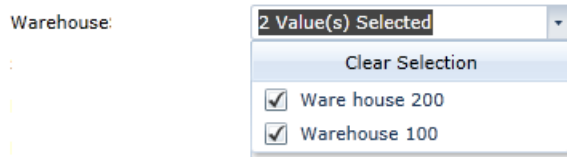
You can also complete indexation if you have previously created a preregistered Document. You can select the **Preregister Document** when you are in the Scan or Upload.

Note: For further details see under [Preregister Document](#) section.

Multi Select Indexes

It is introduced a new Index type , the Multiselect Index.

You can have now under List index, or SQL Index, the Option to have Multiselect Items when you have a list of values. Once this Property is correctly assigned in iManage, you can have this feature in iDesk, like the picture below:



Upload Document

With Upload Document features you can add documents directly from your computer to the iDesk.

Click on the upload button  from Toolbar Menu. Then Click on **Browse button**.

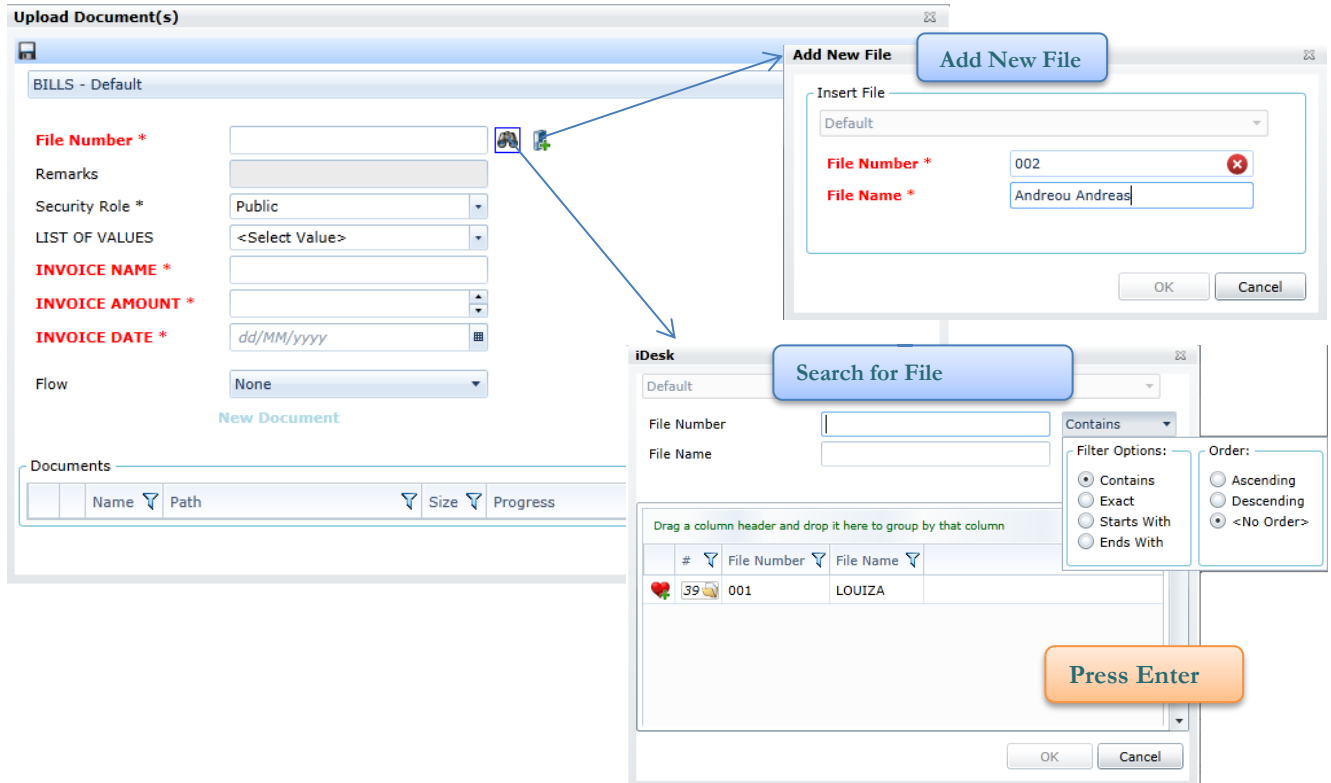
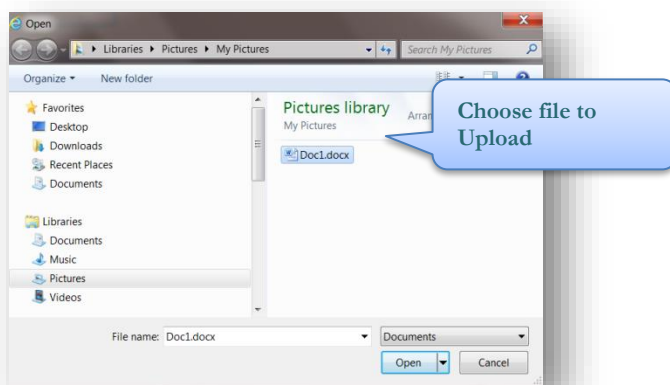


Figure 24- Upload Document

Choose from your computer the Document (s) you wish to Upload, and click open.



You need now to fill in the Indexes in similar way we explained in this manual before, and click save.

Upload Document(s)

BILLS - Default

File Number * 001-LOUIZA

Remarks

Security Role * Public

LIST OF VALUES VISA

INVOICE NAME * Internet Cable

INVOICE AMOUNT * 50.00

INVOICE DATE * 01/02/2016

Flow None

[New Document](#)

Documents

	Name	Path	Size	Progress
<input checked="" type="checkbox"/>	CableNet_Augoustos_2015_01-056923.pdf	C:\Users\LZeniou\Desktop\IMAGES_DOCS_FOR_TEST	38 kB	Indexing Done

[Delete](#) [Cancel](#) [Browse](#)

Figure 25 – Filling Indexes of Upload Documents.

If you return now to iDesk and **refresh** your tree, you can see now the new Documents uploaded.

*Note: It will show the status **converting** until it finishes the conversion of the images of the Document.*

Indexing Multiple Documents:

You can Browse and upload more than one documents at the same time. Just click from the Documents Grid below and do the correct indexing for each document

Upload Document(s)

BILLS - Default

File Number * 001-LOUIZA

Security Role * Public

PAYMENT METHOD <Select Value>

Remarks

test

test2

INVOICE NAME * INVOICE1

INVOICE AMOUNT * 200.00

INVOICE DATE dd/MM/yyyy

Flow None

[New Document](#)

Documents

	Name	Path	Size	Progress
<input checked="" type="checkbox"/>	1569.pdf	C:\Users\LZeniou\Desktop\IMAGES_DOCS_FOR_TEST	490 kB	Indexing Done
<input checked="" type="checkbox"/>	CableNet.pdf	C:\Users\LZeniou\Desktop\IMAGES_DOCS_FOR_TEST	38 kB	Indexing Done

[Cancel](#) [Browse](#)

You can upload more than one Documents, Each File Uploaded will be treated as a different Indexed Document

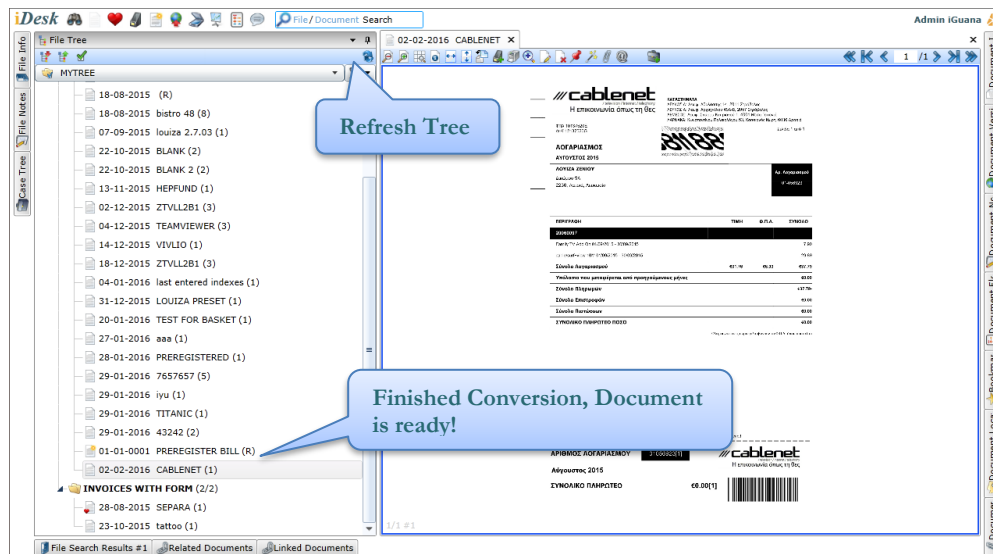
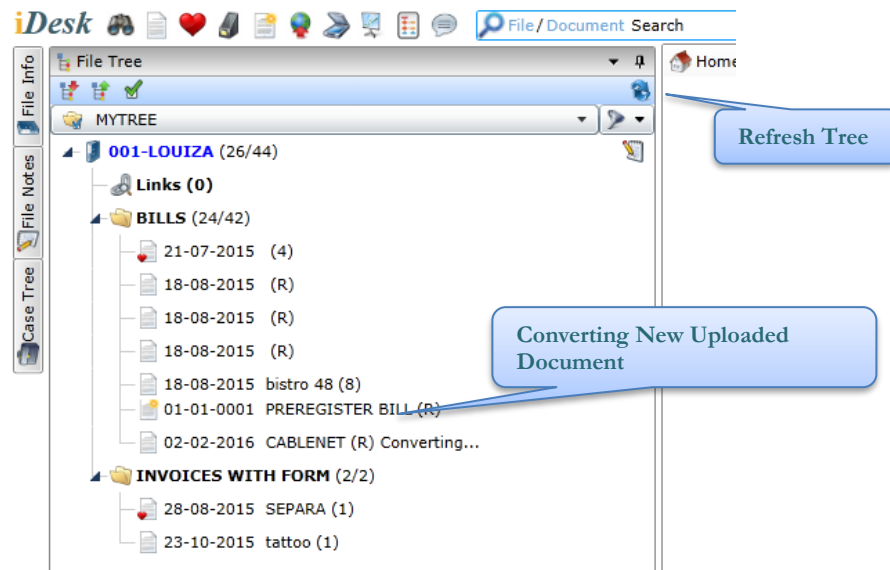


Figure 26- iDesk preview of Uploaded Documents

Button Import & Send (email) Document

You have also the Option to save and send immediately to email recipient(s) a document once it is uploaded.

Upload Document(s) Save and Send

General Documents

Security Role * Public

INVOICE NAME * Electricity Bill

INVOICE AMOUNT * 200.00

NavisionID

Flow None

New Document

Document(s)

Name	Path	Size	Progress
------	------	------	----------

Cancel Browse

e-Mail

Mail Info

From lzeniou@iguana-dms.com

To lzeniou@iguana-dms.com

CC:

BCC:

Title

Attachments 04/10/2016 Electricity Bill 200

Combine Attachments

Body

Hello this is an the document for..

Cancel Send

Choose recipients

Name	Firstname	Email
	Louiza	
	u5	
	u6	
	u7	
	u8	
(pwd 4gsolution)	agsolution	
(pwd: Dyn4nicWork5#)	Dynamicworks	
Abaqouy	Abdelwahid	aAbaqouy@iguan
<input checked="" type="checkbox"/> Admin	iGuana	lzeniou@iguana-d
Administrator	ScanFactory	
Aerts	Frans	faerts@iguana-dn
Aerts	Frans	faerts@iguana-dn
Andreou	Andreas	aandreou@iguanz
Buys	Stijn	sbuys@iguana-dn
Cremens	Jean-Luc	JLCremens@iguar

OK

Versioning

Version control lets you track your files over time. You can manage your document review process by creating and maintaining multiple versions of a document. Version control allows you to find the differences and modifications between files.

Upload new version (File Tree)

To version a file, go to your **File tree** and right click on a document and choose the option **Upload new version**.

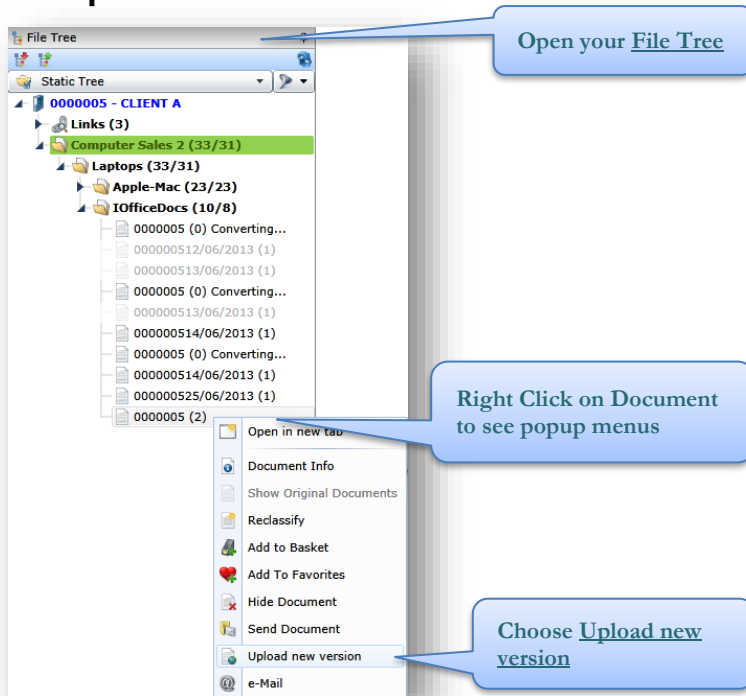


Figure 27- Versioning a Document

Once you send a document for versioning, it is saved in your basket. Open your basket and you will see the document to be versioned under the category "Update" as shown below.

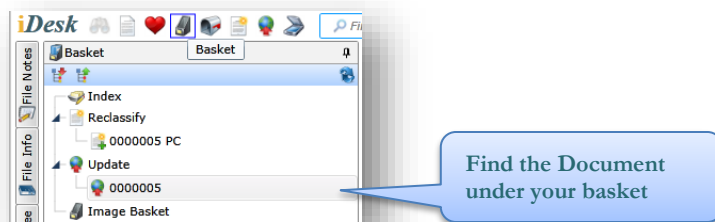


Figure 28- Basket- Documents for versioning

Document Versions (Basket)

Select the 'Document for versioning' found under your Basket to load it, and it will show you the Panel of Document Versions with the version actions you can do.

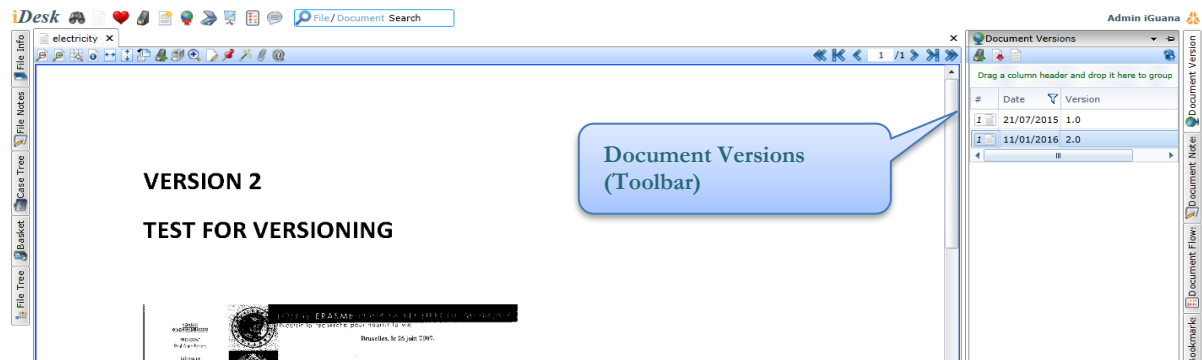
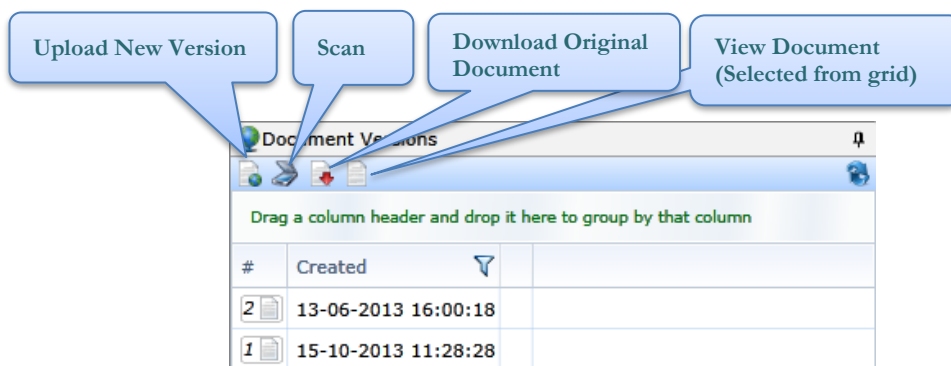



Figure 29 – Document Versions

Upload New Version



This works only for documents that are of type of Document (pdf, word, etc..). Press on the icon Upload  and you choose a file to upload.

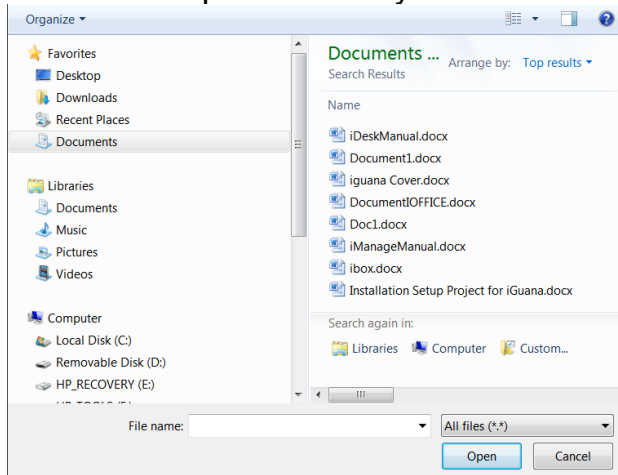
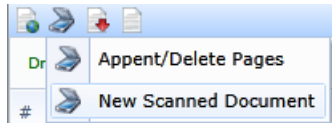


Figure 30 – Versioning Document by Uploading a document of type pdf, word, etc..

Scan

The Scan option, has two sub menus:



- Append / Delete Pages (Modifies the Document by Adding, deleting images from the Document)

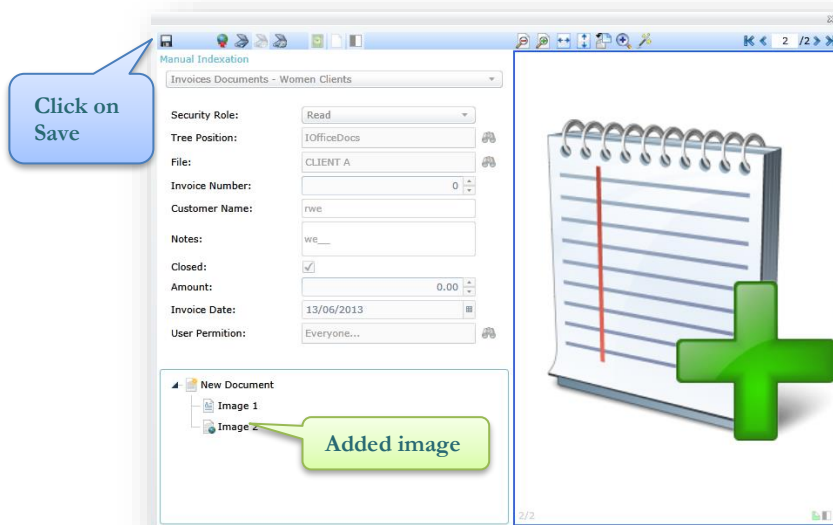
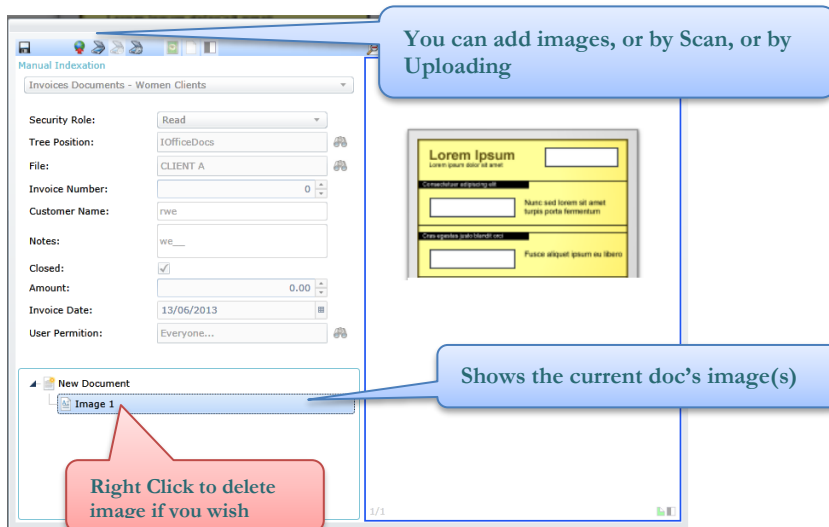


Figure 31- Scan (Append)

- New Scanned Document.(Will scan a new Document, and save it as a new version)

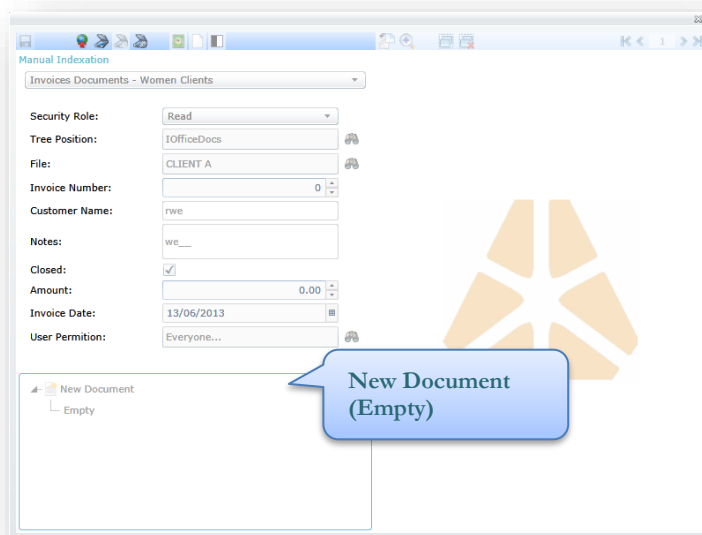


Figure 32- Scan New

To finish the Versioning, you click on **Save**  button. Automatically the Document is unlocked from the Basket and you can view it from the tree, in its latest version.

Download Original Document

This also has effect only to Documents that were created by pdf, word etc..

Select from the grid of previous versions, and then click on Download Original Document, to show the specific document of the specific version, as it is in it's original form.

View Document

Select from the grid of previous versions, and then click on View Document, to show the specific document of the specific version.

Mailbox

IDesk has the Mailbox Module, where a user that is logged in, can access his Outlook Mail, considering that his email address is configured correctly into iManage under users section and IMAP settings under Applications.

To access Mailbox, open iDesk and click on the Mail icon.

The Default view you can see is the MailBox.

MailBox

It has the same look and feel like outlook and you can easily add any Email with its attachments directly into iGuana.

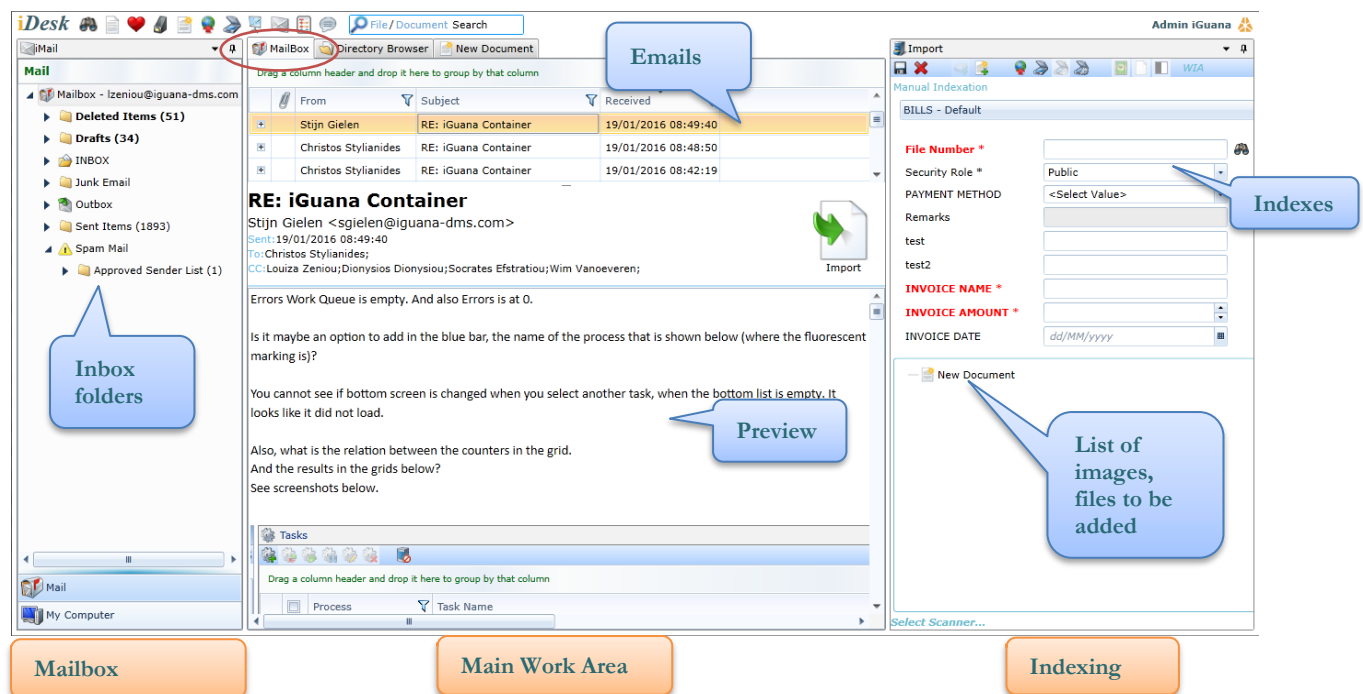


Figure 33- Mail Work Area

Note: If you change the structure of your Mailbox in Outlook, right click on inbox of IDesk's Mail, and click Refresh.

Only with the refresh, you can rebuilt the tree, otherwise the browser uses the cached items.

Import as Document Attachments

You can import an email from the Import Icon (upper right corner) all attachments remain as attached document on the "iGuana" document to be created.

Like shown in picture below:

Primary Document

Document's attachments

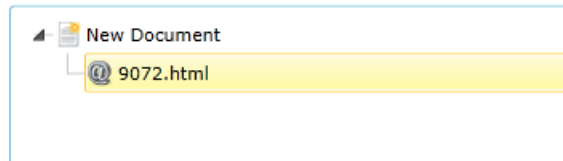
Click to Import :

- The Email
- Attached contents as iGuana Attachments

Import as Converted Document

Up to now if you import an email from the Import Icon (upper right corner) all attachments remain as attached document on the "iGuana" document to be created.

Like shown in picture below:



Now the option to be converted is available

Mail -> open mail with attachment -> right on the attachment link -> option to Import attachment and be converted

The screenshot shows the iDesk interface with an email open. The email is from Louiza Zeniou to Louiza Zeniou, dated 30/11/2016 08:47:35. It contains two PDF attachments: 'Atlantic Pendant - May 2016.pdf (88.89 KB)' and 'Cable_Net.pdf (38 KB)'. The 'Atlantic Pendant' attachment is circled in red. A right-click context menu is open over the attachment, showing the 'Import Attachment' option. A blue callout box explains that the imported attachment(s) will be added under the NEW Document node. An orange callout box provides instructions: '-Right Click', '-Click on Import Attachment', and '- This will import the Document to be converted, united with multiple pdfs if you want as one document.'

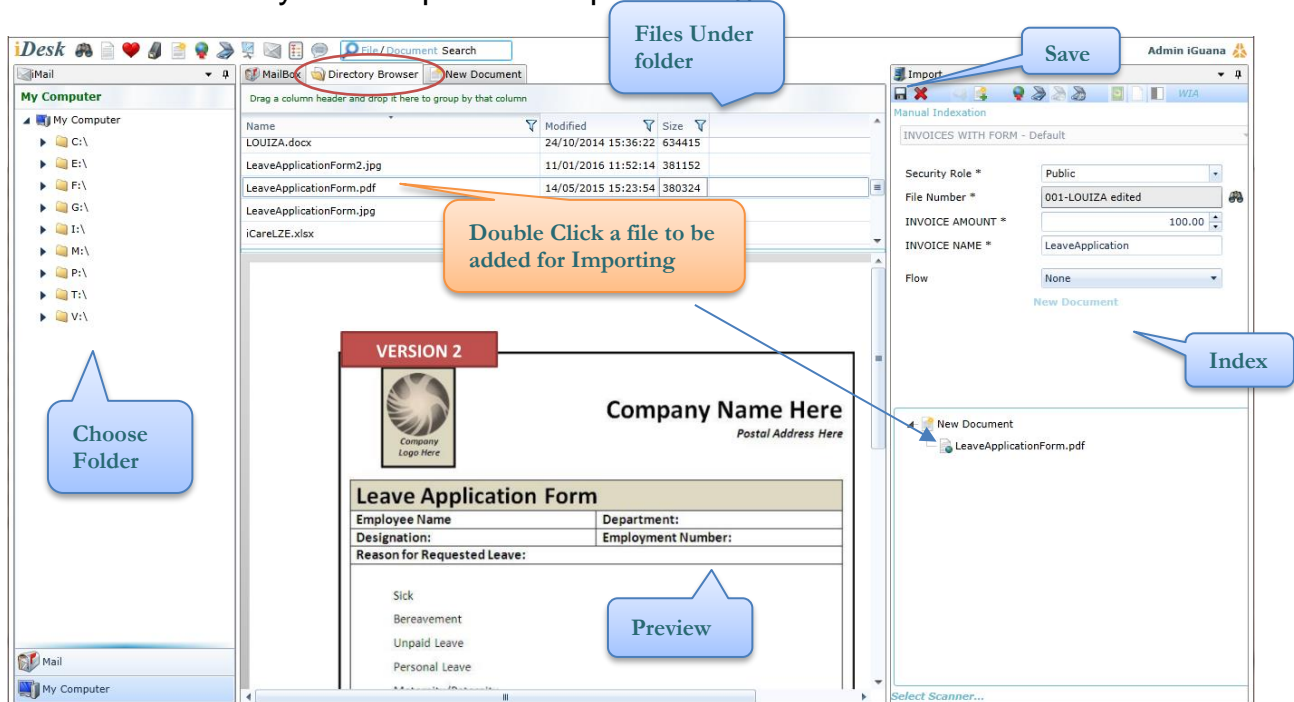
Import Attachment

The Imported attachment(s) of Email, is added under the NEW Document node. All Under the New Document will be added in one merged document.

-Right Click
-Click on Import Attachment
- This will import the Document to be converted, united with multiple pdfs if you want as one document.

Directory Browser

The Second Tab from your Main Work area, is the Directory Browser. You can choose a file from your Computer and upload images or files from there.



First, you choose a Folder, from MyComputer,

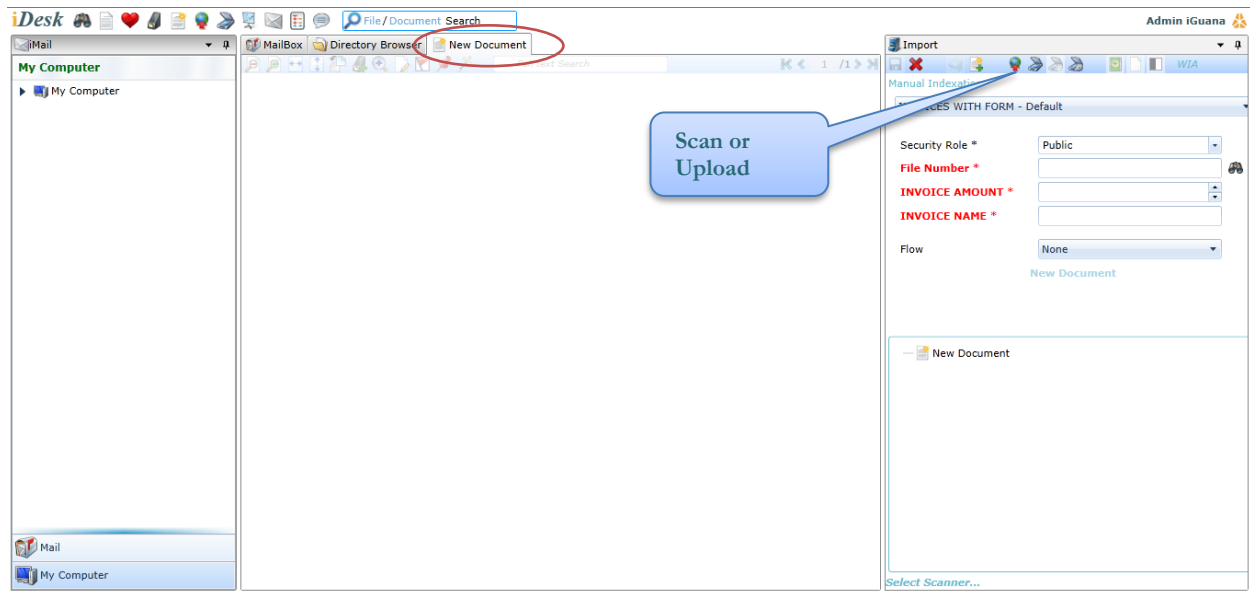
Then you Choose the Document class from the Import Tab.

Double click on the Document(s) Under the Directory Browser

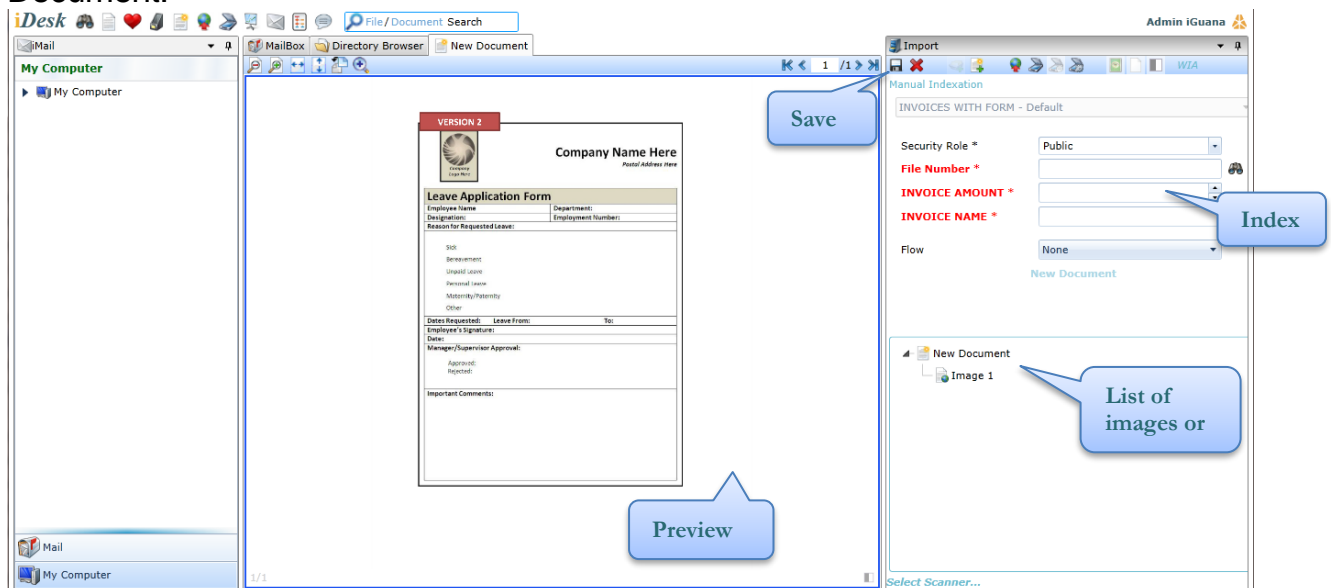
Fill in the Indexes, and click on Save.

New Document

The Third Tab from your Main Work area, is the New Document. You can scan a new document, or import from your hard Drive, and create a new Document.



The scanned or uploaded Document can now be indexed and saved as a new Document.



Fill in the Indexes, and click on Save.

Sending Documents

To **Send a Document** from your iDesk, go to your Documents tree and choose a Document. Right click to get the pop up menu, and choose **send Document**.

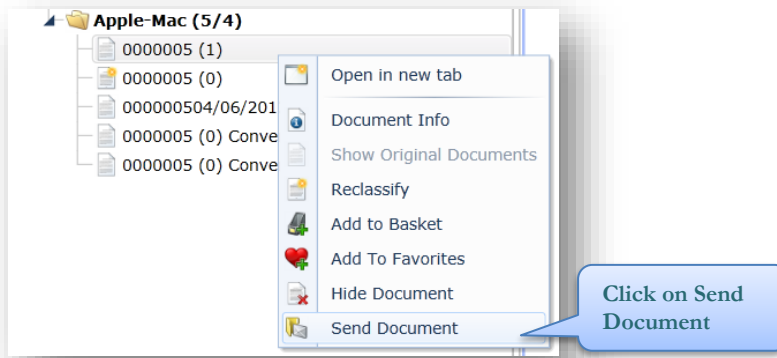


Figure 34- Choose a Document and click on Send Document.

Choose the users(s) and then Click on Send button.

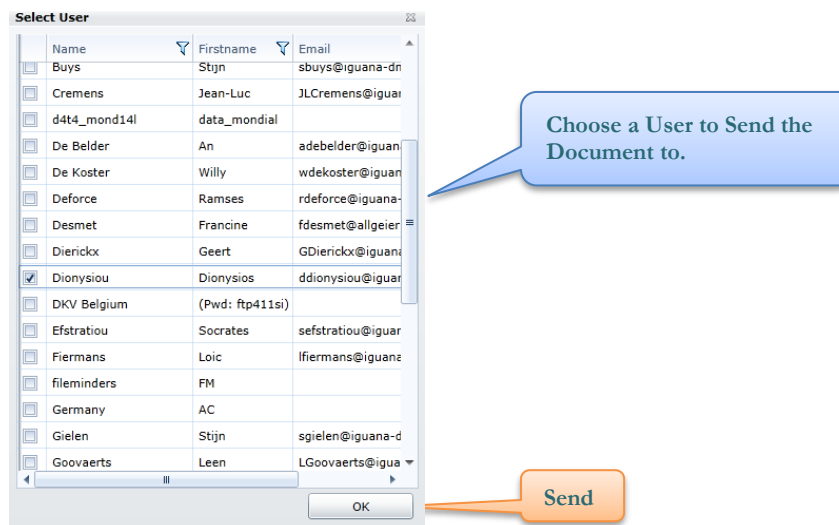


Figure 35- Sending Document

e-Mail

In iDesk, you can send Documents to Users using email.

***Note:** Make sure you enable **Send EMail** option from iManage in Group Security.*

To Send Email by attaching Documents, just select the Document from your Tree Documents, and right click to see the popup Menu. Then click on the e-Mail option.

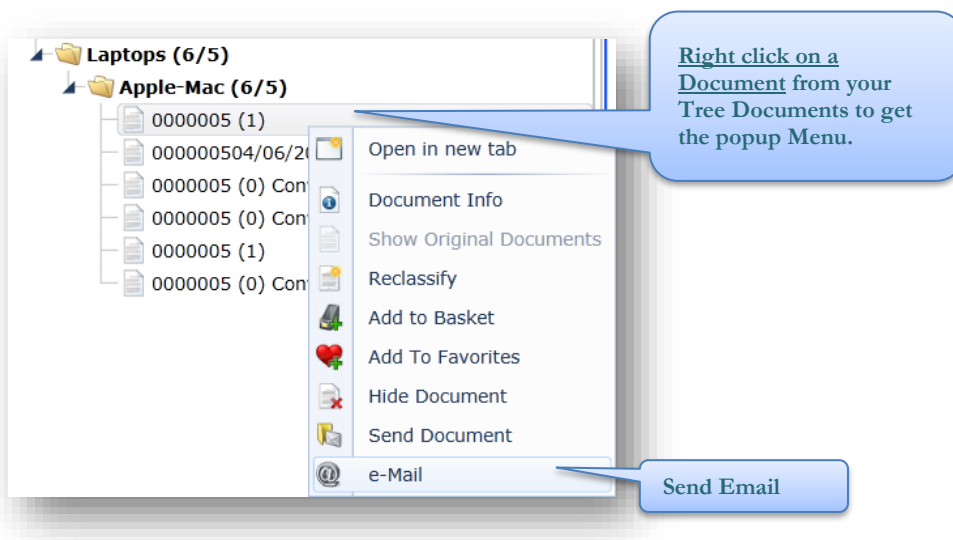



Figure 36- Sending Email (From Documents Tree)

Another way of sending email is from your basket. In the Opened Document, click on the Email button from the toolbar .

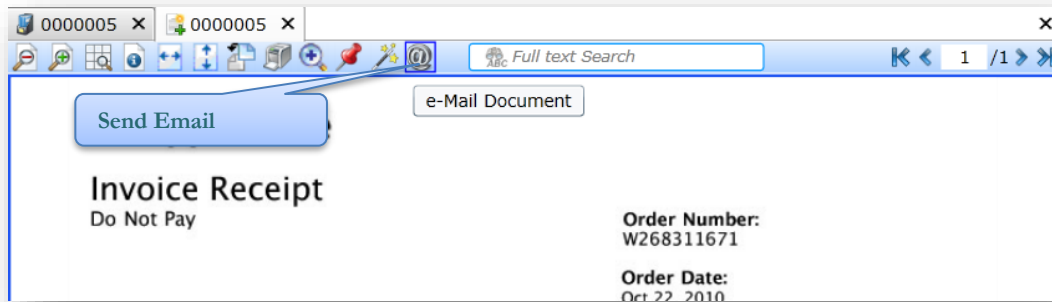


Figure 37- Sending Email (From Basket)

Once you click the e-mail option, then you can see the e-Mail form. Complete the necessary fields and click on Send.

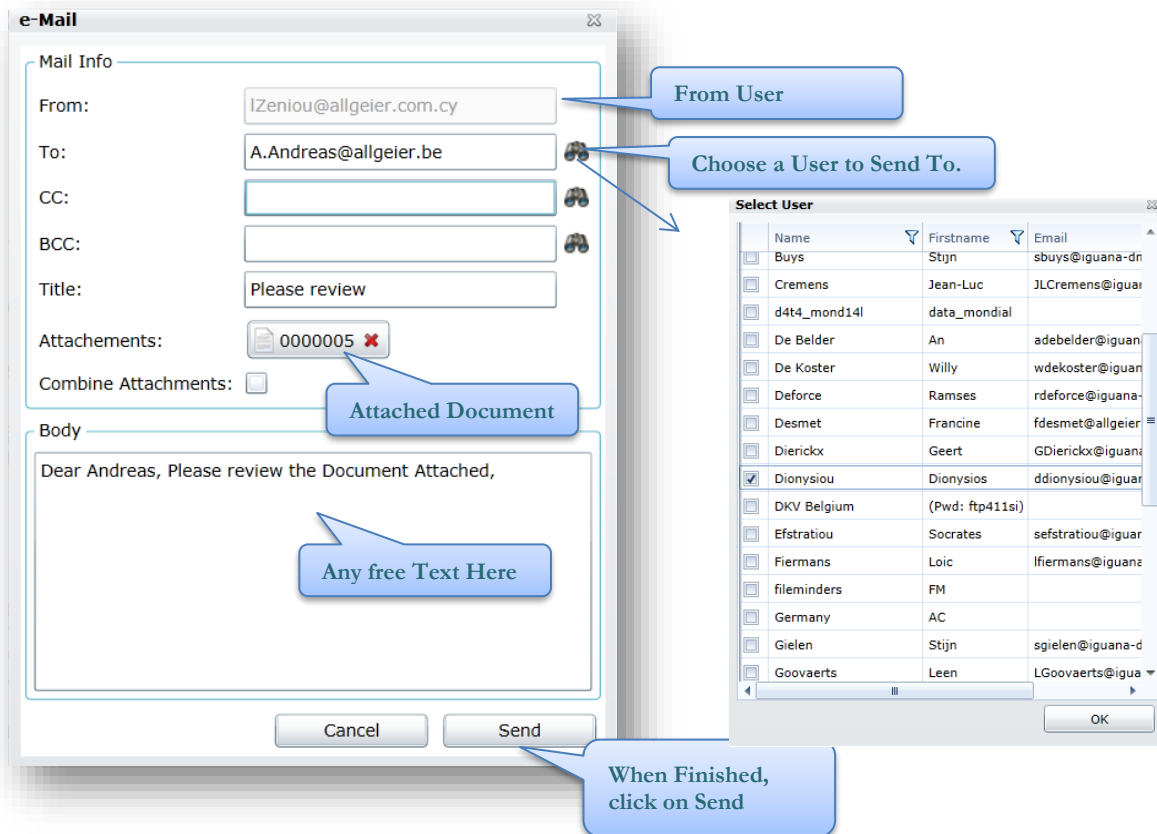


Figure 38 – Email Form

Reclassify

Reclassify is the feature in iDesk that allows you to **move** a Document from one **Document class to another**, and changing the Indexes of that.

To be able to do that, just select the Document from your Tree Documents, and right click to see the popup Menu. Then click on Reclassify option.

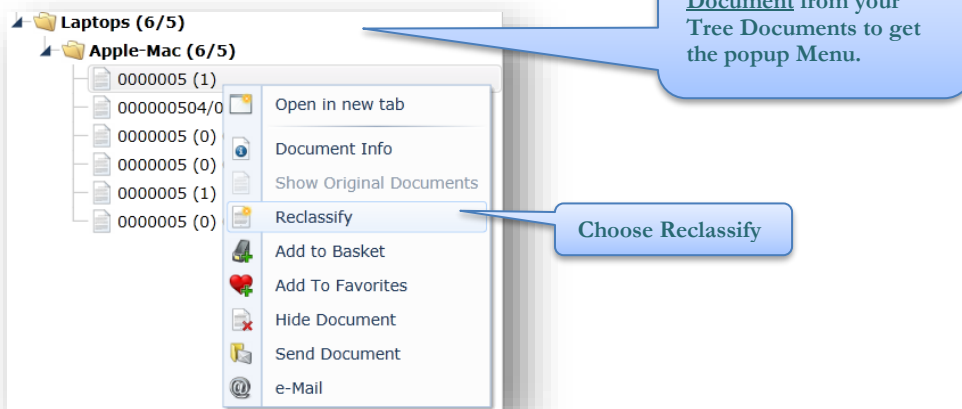


Figure 39- Reclassify

The Documents that are marked to be reclassified are shown in Basket.

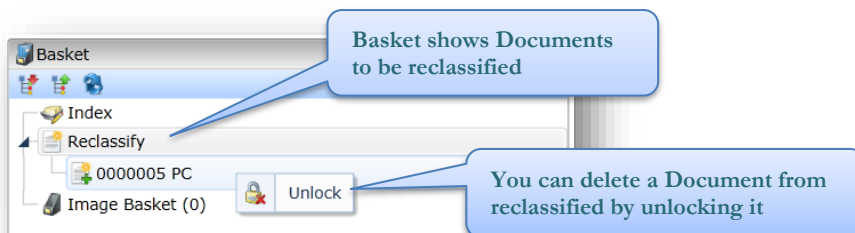


Figure 40- Reclassify Items in Basket

Document Reclassifier Toolbar.

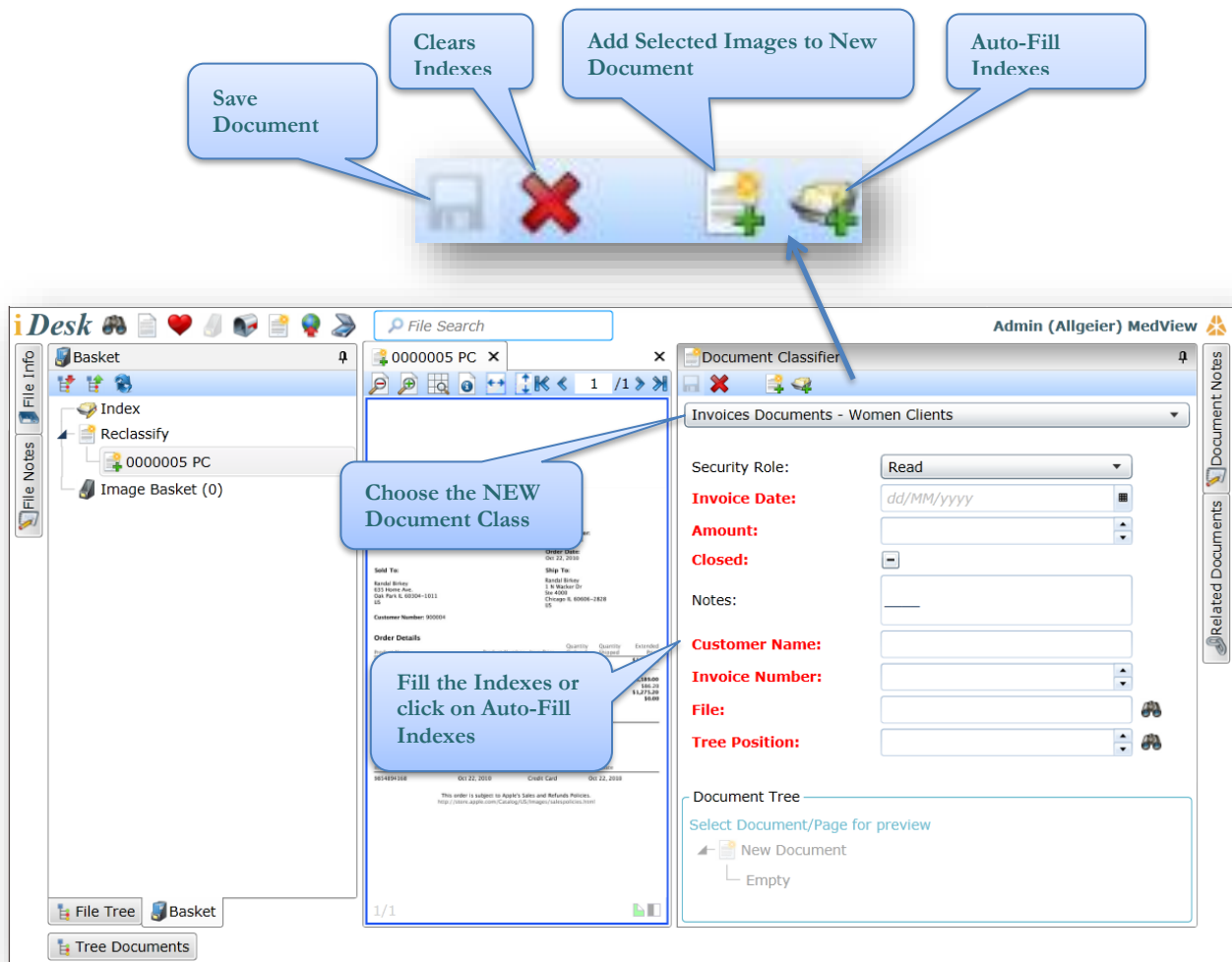


Figure 41- Document Classifier Screen

To reclassify the Document, you need to :

- Choose the Document Class you wish to change to
- Complete the Indexes (manually or using “Auto-fill Indexes”)
- Click on button “Add Selected Images to New Document”
- Click on Save

In that way you have reclassified your Document.

Reordering Images

Using the Reclassify feature we can reorder the images of an existing document, if that document does not have an original document.

Note: Original Documents do not have the reclassify option available

We Add into the basket a document with the reclassify method as explained above.

You select the images you wish to recreated as new document, and click on Add selected Images.

Below the Images are added in the Document Tree, and then you can Drag and Drop to reorder them. Then Click **save!**

Click on "Add selected images..."

Document to reclassify

Select Images of Document (Yellow border= selected)

Images are added

Document Tree

Select Document/Page for preview

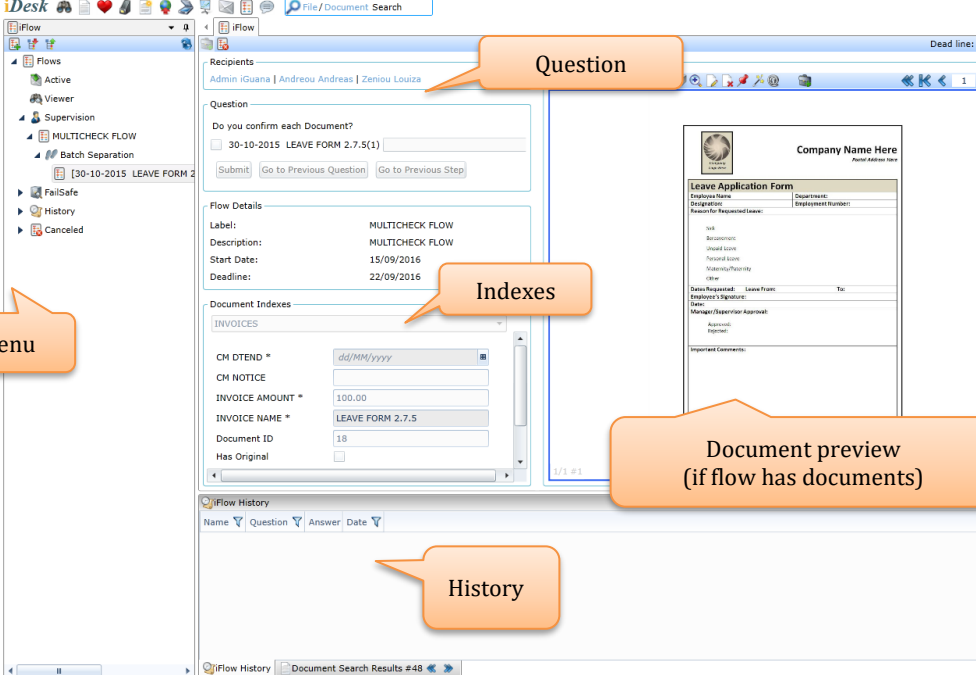
- New Document
 - Image 217
 - Image 218
 - Image 219

Drag and Drop to Reorder

iFlow

By pressing the iFlow button  on the toolbar menu, he can see the iflow Module.

Work Area



The screenshot shows the iDesk iFlow module interface. The interface is divided into several sections:

- Menu:** A sidebar on the left containing a tree view of flows, including 'Active', 'Supervision', 'MULTICHECK FLOW', 'Batch Separation', 'FailSafe', 'History', and 'Canceled'.
- Question:** A central area displaying a question: 'Do you confirm each Document?' with a checkbox and a date range '30-10-2015 LEAVE FORM 2.7.5(1)'. It includes buttons for 'Submit', 'Go to Previous Question', and 'Go to Previous Step'.
- Indexes:** A section below the question showing flow details (Label: MULTICHECK FLOW, Description: MULTICHECK FLOW, Start Date: 15/09/2016, Deadline: 22/09/2016) and document indexes (INVOICES) with fields for CM DTEND, CM NOTICE, INVOICE AMOUNT, INVOICE NAME, and Document ID.
- Document preview (if flow has documents):** A preview of a 'Leave Application Form' document, showing fields for Employee Name, Designation, Supervisor, and various dates and signatures.
- History:** A table at the bottom showing the flow history with columns for Name, Question, Answer, and Date.

Callouts point to these sections: 'Menu', 'Question', 'Indexes', 'Document preview (if flow has documents)', and 'History'. A separate callout on the right states: 'You can Add Document from here' pointing to the document preview area, and another states: 'Documents attached with the iflow' pointing to the document preview area.

Figure 42 iFlow in iDesk

As soon as a new document arrives, an iDesk user if he was assigned in the Groups of iFlow , can see if he has something assigned to do

Badge for Number of iFlows

Once a users is logged in to iDesk and he has pending iflows to review, he can see the iflow icon with a small numbering.

Active iFlow Instance(s)

Click under the Active one of the iFlow instances to load it.

Then answer the question with the options predefined in iManage and press submit to save the answer and continue with the flow.

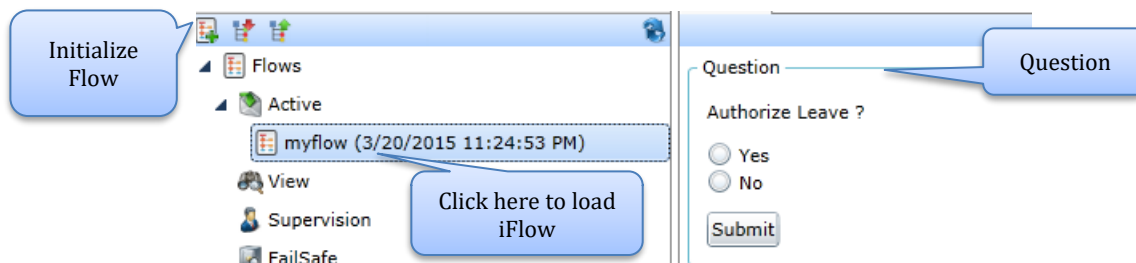


Figure 43 Active flows

Answering Question(s) of various types.

Confirm

Question

Approve ?

Confirm

Check (Yes/No)

Question

Authorize Leave ?

☐ Yes

☐ No

Submit

Choose your answer and press submit

List

Question

What is the Condition of the Scanned Document?

☐ Excellent

☐ Good

☐ Poor

Submit

Choose your answer and press submit

Text

Question

Please Write the Payment Method

Visa

Submit

Write your answer and press submit

Scan

Question

Scan The Document Again

Scan

Click Scan to Open the Scan / Upload Document Window

Scan/Upload Document(s)

Manual Indexation

INVOICES - Default

Document Class *

Security Role *

File Number

INVOICE NUMBER *

INVOICE DESCRIPTION *

INVOICE DATE

DOCTYPE

IS APPROVED

New Document

Select Scanner...

Multi check Type

Navigation Link on Document's Pages when index is Number of Pages

When the flow has a multicheck type with **Number of Pages** as a Master Index, then next to each checkbox, there is a number that is clickable and can Navigate you to the Document Page that is linked to each number.

History

In this way you continue answering the questions until the end of the flow. Then it appears in history.

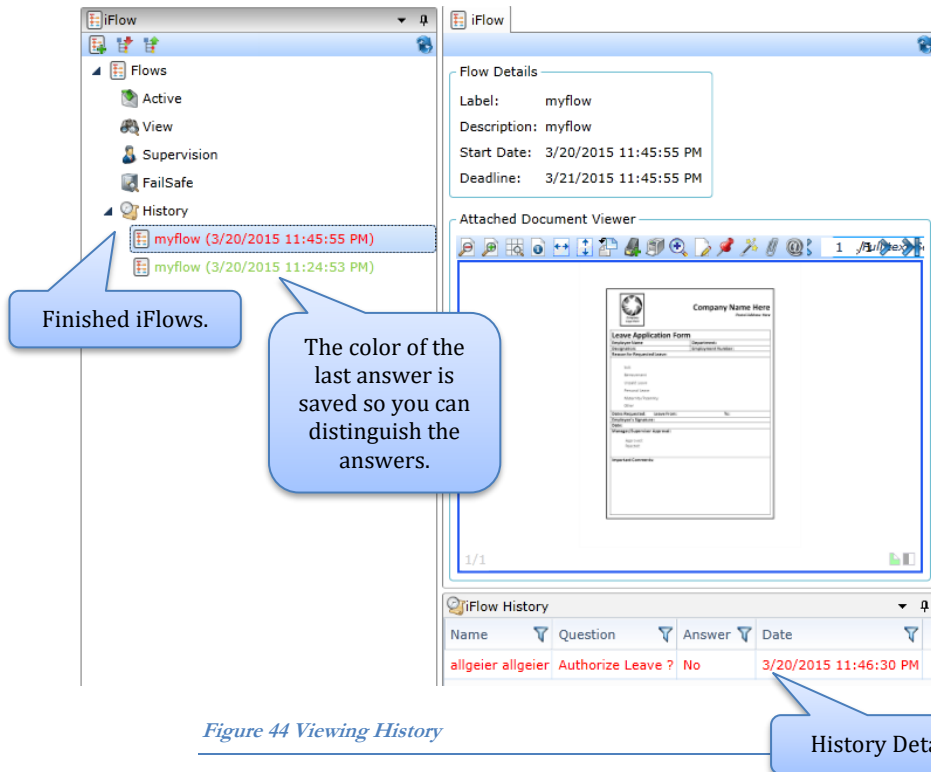


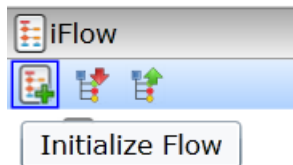
Figure 44 Viewing History

Initialize Flow

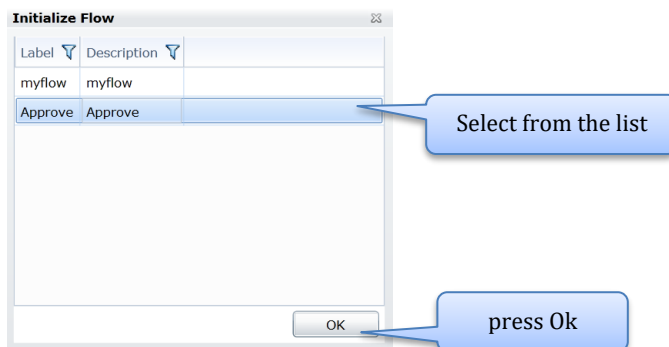
An iflow can be started from Importer or it can be user initiated either from iCapture or iDesk.

iDesk - iFlow Menu

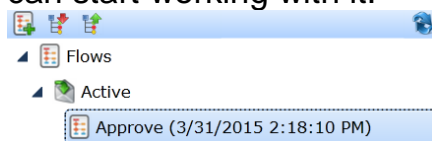
From the iFlow menu in iDesk click on the button  (Initialize flow)



Then you will see the list of the available iflows. You select the one you want to run and click Ok.



As soon as you press ok you can see it under the Active Flows and you can start working with it.



Indexing in a flow

When Uploading a new Document, or Scanning a new Document from iDesk, scroll down to the last Index, and you will see the Routing (iflow) Index. From There, you can select which I flow you want to initiate as soon as it is saved.

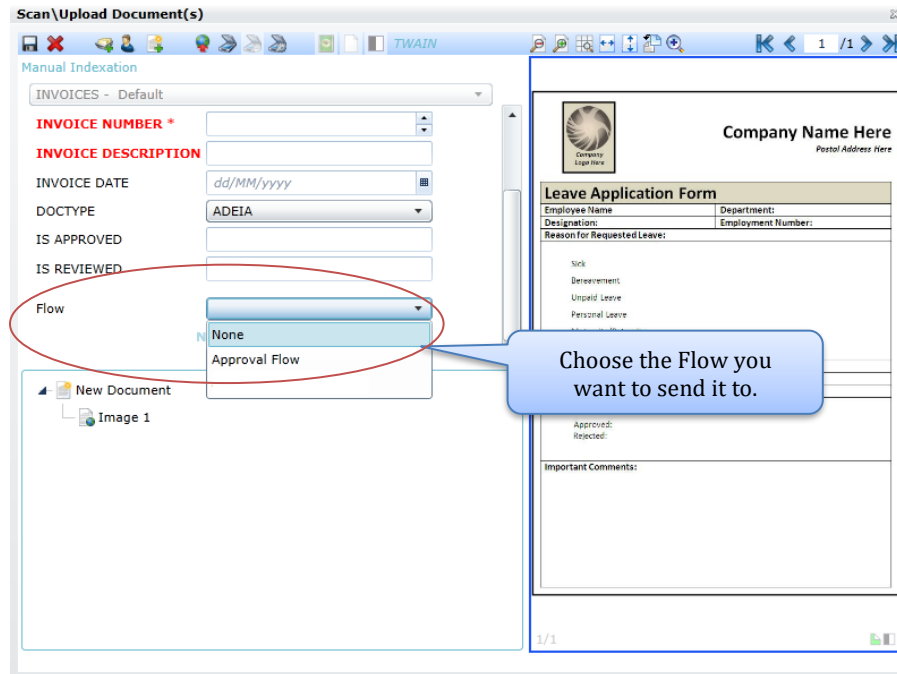
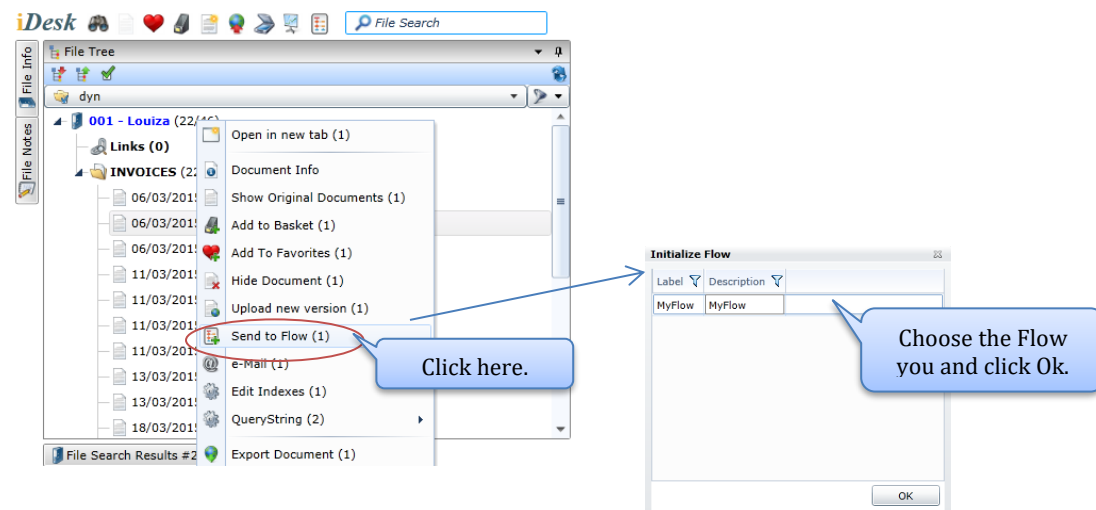


Figure 45 Initializing iFlow from Indexes when scanning/uploading

Send to Flow

When you are in iDesk and you right click on the file tree, there is an option to send a Document to a flow.



Linked Documents

When you add a new Document in a flow, then all the documents are linked together and are shown also in Linked Documents Tab.

INVOICENAME * INVOICEAMOUNT * NavisionID Document Type *

Date: Manager/Supervisor Approval: Approved: Rejected: Important Comments:

1/1 #1

Linked Documents

#	Document	Description
1	30/11/2016 second 800	Common Flow
1	02/12/2016 FURNITURE 800	Common Flow

Document(s)

Copy Indexes of Master Document

When you add a new Document, it copies Indexes of Master Document when adding a new Document. As you see below, the Indexes were filled automatically once the Add button was clicked.

Scan\Upload Document(s)

Manual Indexation

PURCHASES

Security Role * INVOICENAME * INVOICEAMOUNT * NavisionID Document Type * Flow

New Document

New Document

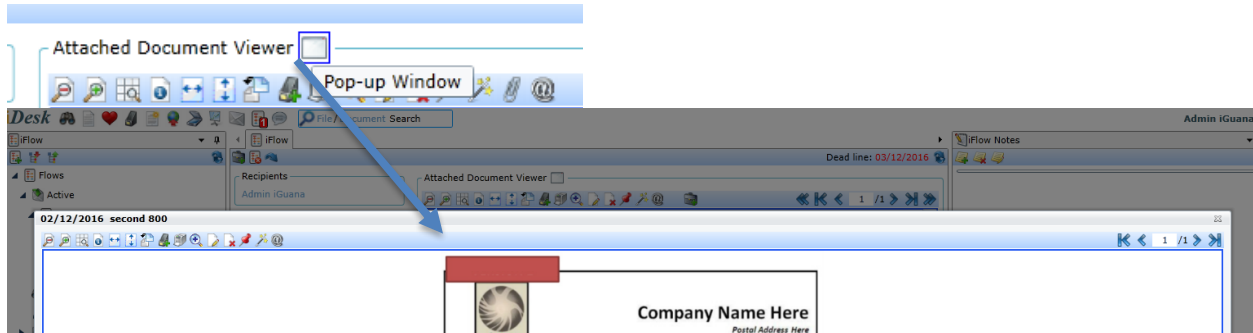
Document(s)

Add new Document

1 02/12/2016 second 800

Full Screen Popup

On the Viewer of the Document, there is a new button now that you can click on it and have a full screen of the Document.



iBox

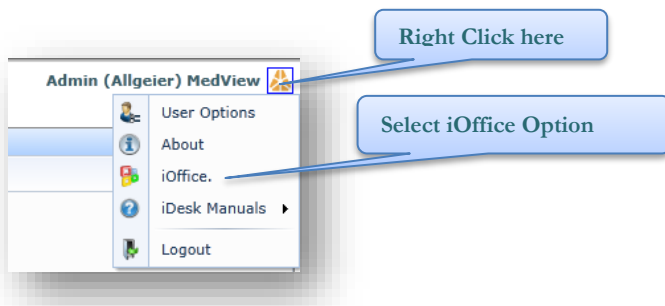
The iBox is a Program that communicates with iGuana Applications with that you can send Documents from your PC directly to iCapture.

Installation

To be able to use iBox, you need to install a simple setup Program that will be provided to you by Allgeier.

After you finish with the iBox Setup, you also apply also some settings using iDesk.

Go to the iDesk Application, and right click on the Right Top Corner, the Allgeier icon.



Then click on iOffice option to save necessary settings regarding the user login and iCapture Web reference.

Accessing iBox

Go to the Windows Explorer to find the images/Documents you need to send to iCapture for processing.

Right click on one or more of the Desired Documents from your pc.

And Click the ibox option. 

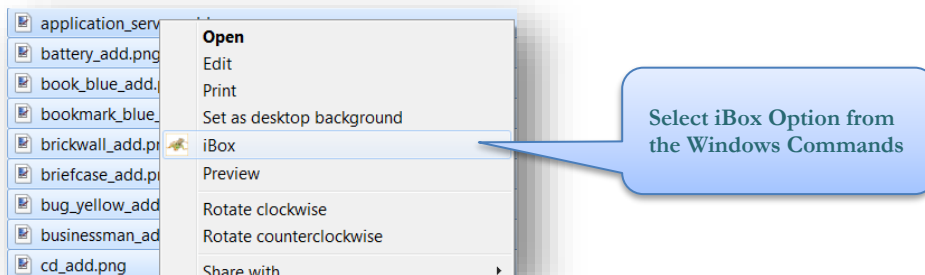


Figure 46 iBox Windows command

iBox screen

The iBox Screen is very simple and is similar to the one used in the iCapture when you need to create a new batch.

Here you will apply your preferences like: Document Class to be archived, Users to be able to be accessed, priority and also give a Description of the Batch. To finish you click OK.

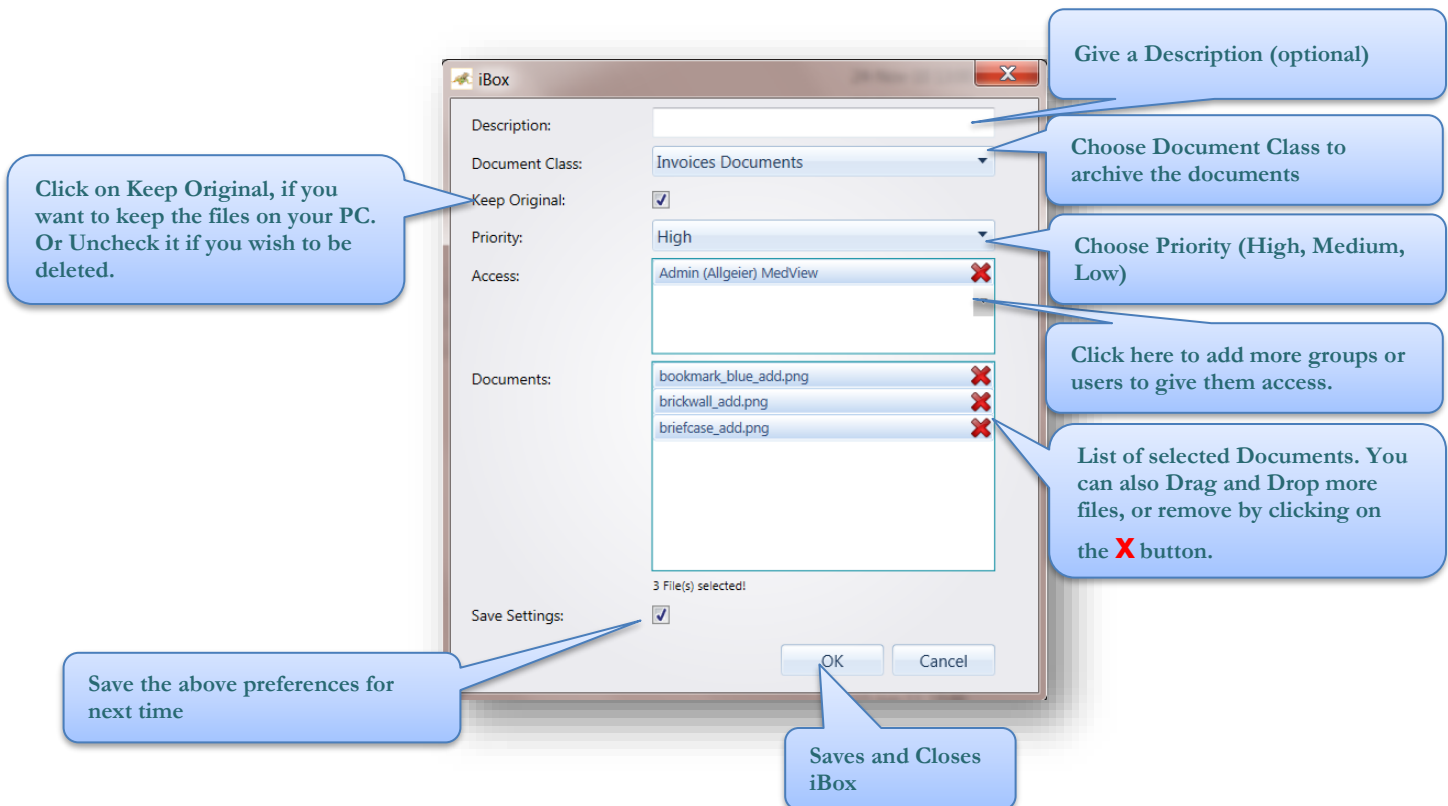


Figure 47- iBox Screen

iOffice

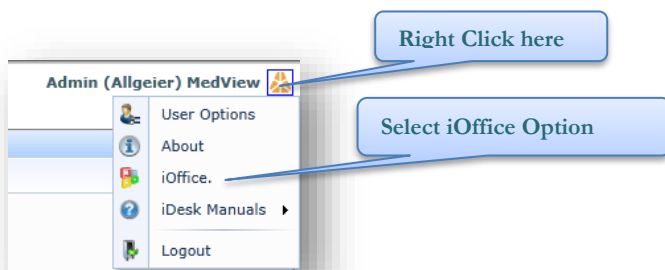
The iOffice is a Plugin created by Allgeier, that incorporates iGuana Options in to your Office Programs.(Word, Excel, Outlook) , giving you the facility to manage your documents easily .

Installation

To be able to use iOffice, you need to install a simple setup Program that will be provided to you by Allgeier.

After you finish with the iOffice Setup, you also apply also some settings using iDesk.

Go to the iDesk Application, and right click on the Right Top Corner, the Allgeier icon.



Then click on iOffice option to save necessary settings regarding the user login and iDesk Web reference.

Accessing iOffice.

As we mentioned above, the iOffice incorporates an iGuana Plugin. That means that when you open Word, Excel or Outlook, you will have a new tab named iGuana, with various options.

To be able to access the iOffice Toolbox options, you also need to Import the Licence.

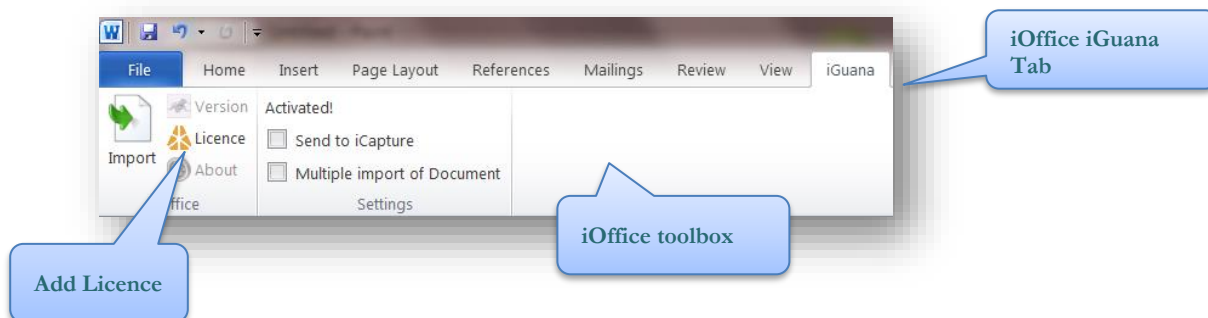


Figure 48 iOffice iGuana Tab

Using iOffice.

With the iOffice you can either Send your current document in iDesk by Clicking the Import button.

Or you can send it as a Batch to iCapture by selecting the “send to iCapture”

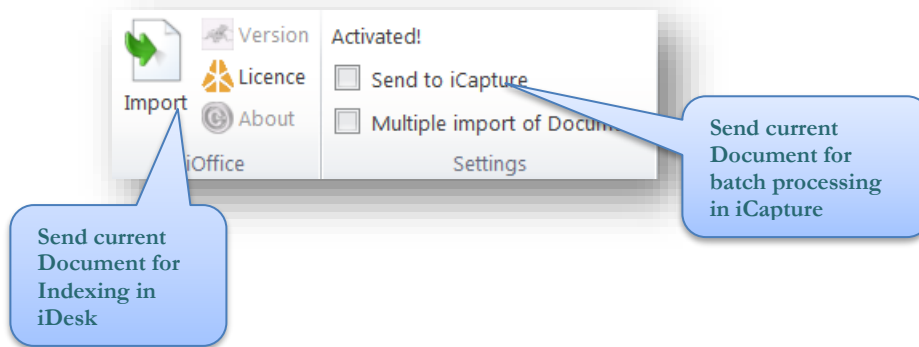


Figure 49- iOffice Toolbox

To import a Document to iDesk, click on **Import**  , and then login to iDesk,.



After a successful login, you can provide the Indexes for the current Document .

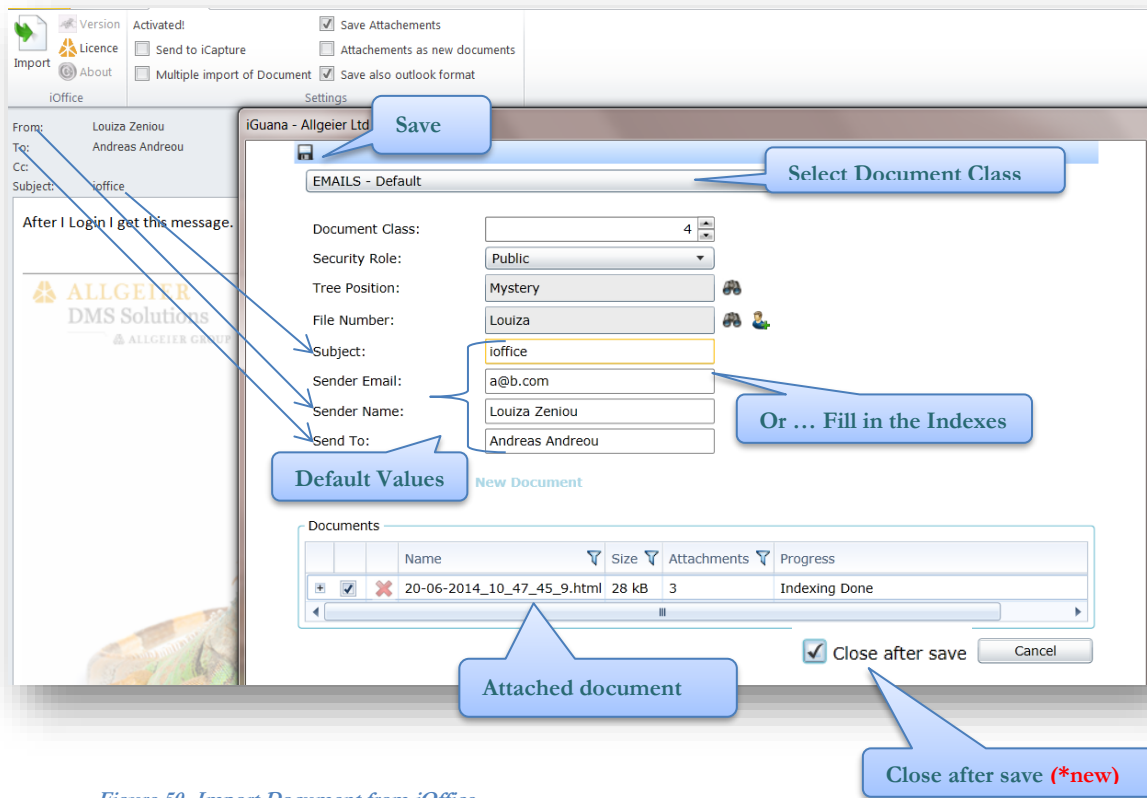
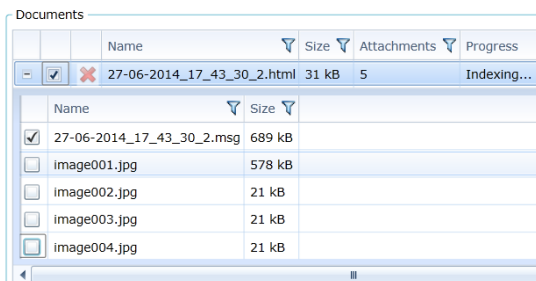


Figure 50 -Import Document from iOffice

To send to iCapture click on “send to iCapture”.

It will show you the iBox Screen (check previous chapter for more iBox Details), where you can send the current Document for processing and indexing through iCapture.

Note: Attachments can be removed from archived mail by unchecking them from the attachments list as the picture shown below.



The **Close after Save** Checkbox, allows you to save a document, using all or partial images from the Email, and the screen stays open, in order to rearchive the Images as a different Document.

iView

The iView is the iGuana Application that shows a specific document, using some parameters in the URL.

It can be used for External Applications, and it requires the following parameters:

- Login authentication,
- Document Identification. (ID, or Indexes to search for).

Note: You can see the [External Applications](#) for further details on how to construct the URL.

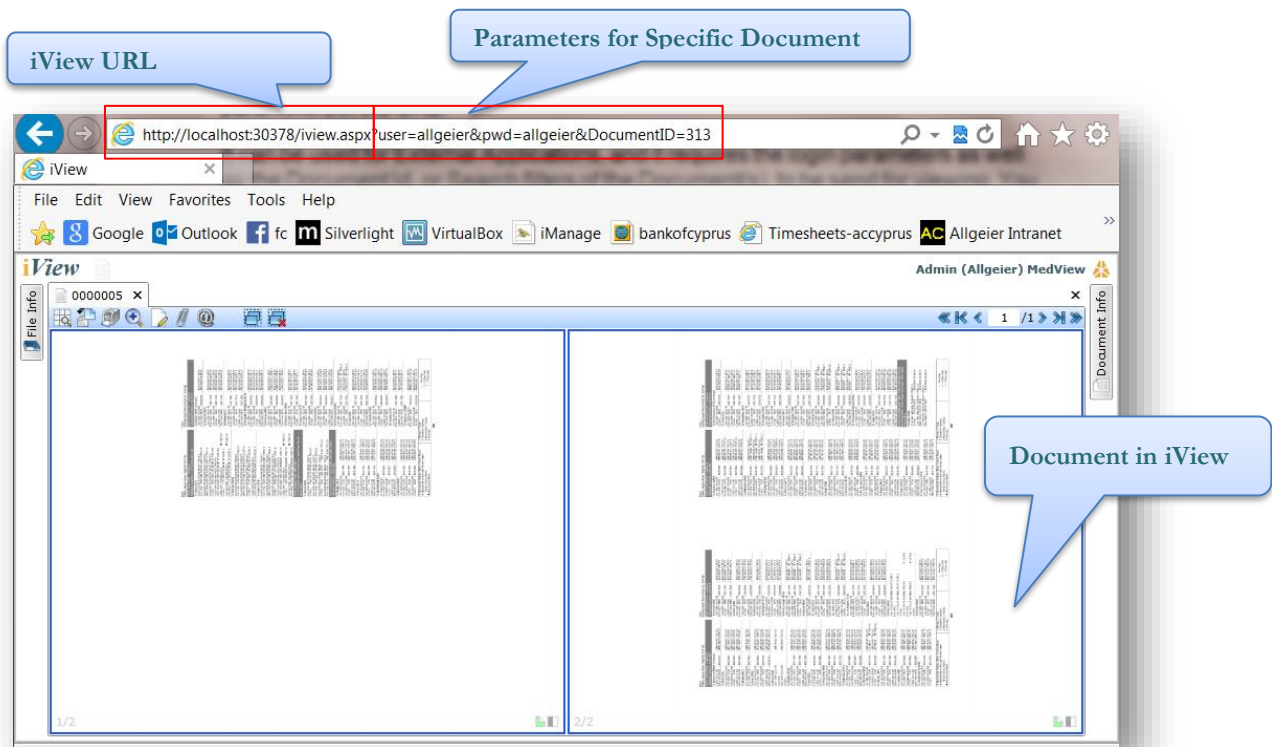


Figure 51- iView, preview of a Document by sending parameters

Reports

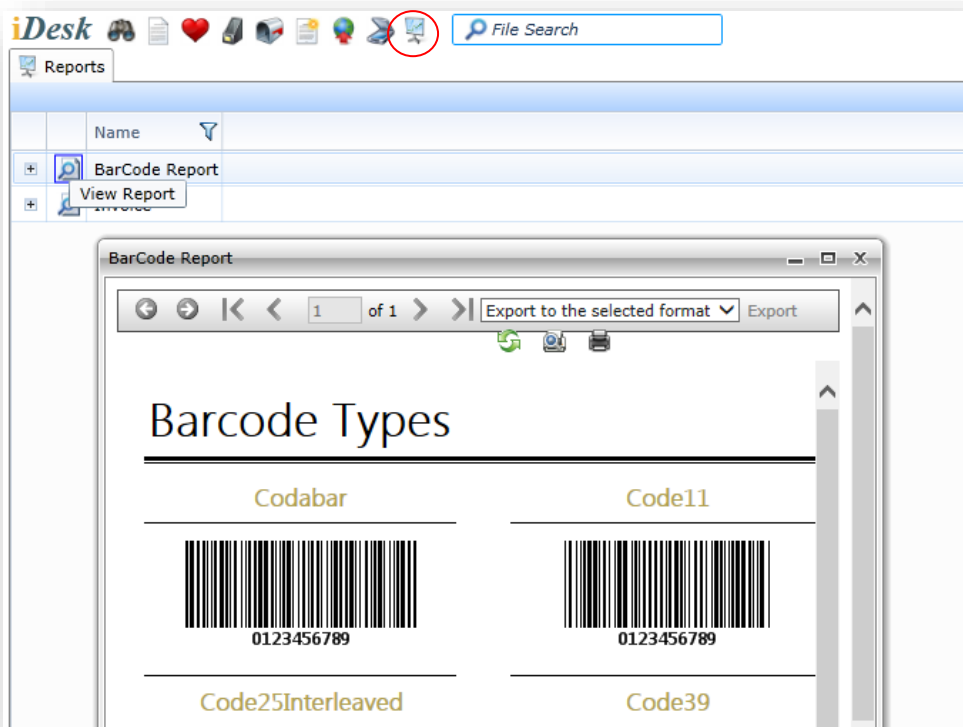
Reports are online documents that a user can visualize data or information according to the Company needs.

The Administrator of the iGuana system has to prepare the reports through iManage and also give the permission to the user groups, to enable users to view them.

To open the reports, click on the report icon  from the iDesk Toolbar menu.

You will see the grid with all the reports that are available for the users to view.

And just click on the view icon , to preview each report.



External Applications

General

An iGuana **Document**, or **Search Results** of iGuana Files/Documents, have a website link (URL). When a user clicks on this link, iGuana will read this as an **External Application**.

An **External Application** can interact and launch one of the iGuana Website Applications such as:

- iDesk
- iView
- iScan

The above iGuana Applications, handles its own authorization, so you have to pass the **Login** information:

- Username
- Password

*Authorization is **Mandatory** (Except for Active directory users)*

You can have Search Results based on at **least one** parameter, **or** a **combination** of the following parameters:

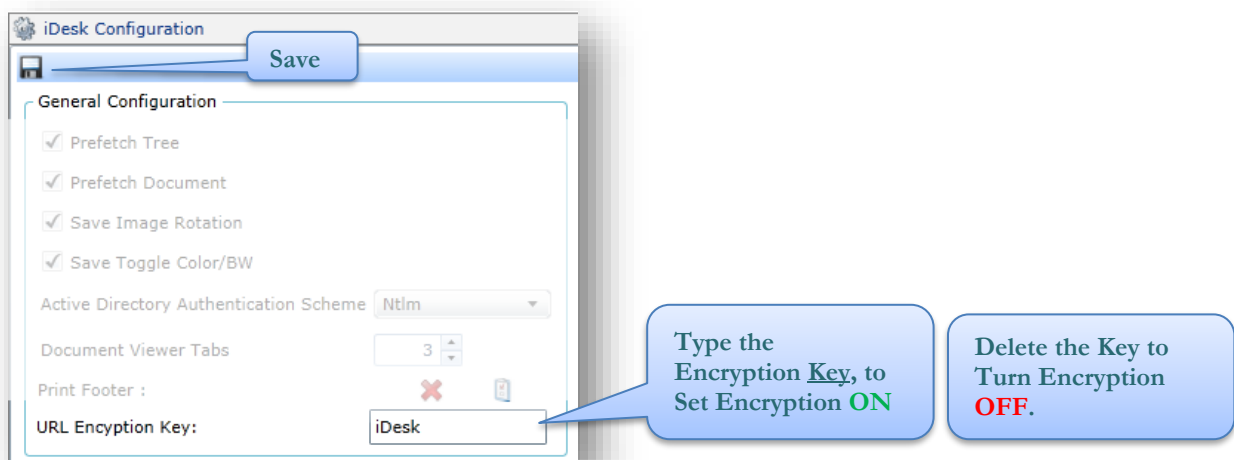
- Document ID (or)
- File Class (and / or)
- File Class Indexes (and / or)
- Document Class (and / or)
- Document Indexes

URL Encryption

What is URL encryption?

When you pass information through a URL ensuring the security, then you need to use URL encryption. Encrypted URLs prevent anyone from seeing the request details.

iGuana gives you the ability to set this option On/Off in the iDesk Configuration of iManage.



The Administrator of your company should use AES algorithm with the Key specified in the iManage, to encrypt the URL, and encode the result in HEX format to ensure that the URL is safe.

Then, the Generated URL can be used in the iGuana Applications.

For Example:

URL Format without Encryption:

<http://localhost/iDesk/iDesk.aspx?user=123&pwd=123&DocumentID=1>

URL Format using Encryption:

<http://localhost/iDesk/6E414E56626A702B6C7A7970496A31637664675A7535314C4B33694E6C505174635A4A535A7864435475773D>

URL Encryption Example

The following is an Example of how to implement the call of the URL encryption in a Simple VB Windows Application. In more detail we will see :

- What is iSDK Service
- Encrypt function of iSDK
- VB Code Example implementation

What is iSDK Service:

iSDK is short for **iGuana Software Development Kit**, a programming package that enables a programmer to develop applications for a specific platform. It includes APIs, programming tools, and documentation.



Figure 52- iSDK URI

iSDK is the main Web service for iGuana operations.

It is a web application build with Silverlight technology and can be accessed through a web browser via [http:// <iGuana Path>/WebServices/iSDKService.svc](http://<iGuana Path>/WebServices/iSDKService.svc)

Encrypt function of iSDK:

Encrypt

" /iSDKService/Encrypt"

Syntax

```
Public Function Encrypt(ByVal Text As String, ByVal URL_safe As Boolean) As String
```

Description

This is the Encrypt operation for returning Encrypted URL for the iGuana session.

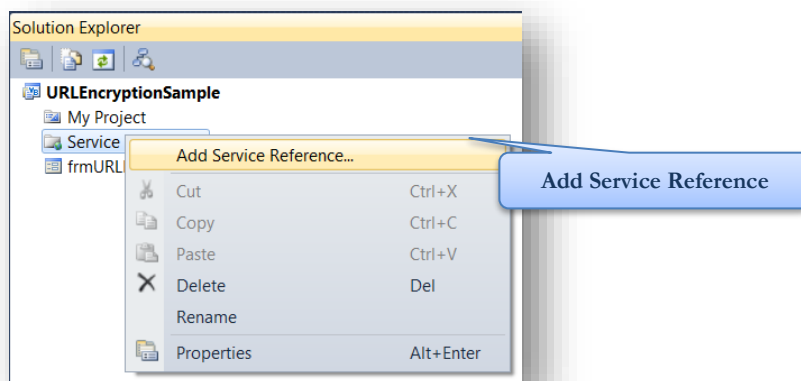
Return Value: [\[String\]](#)

Parameters needed:

Name	Type	Required	Default Value	Description
Text	String	✓	-	The un-encrypted URL string
URL_safe	Boolean	✓	-	Should always send True

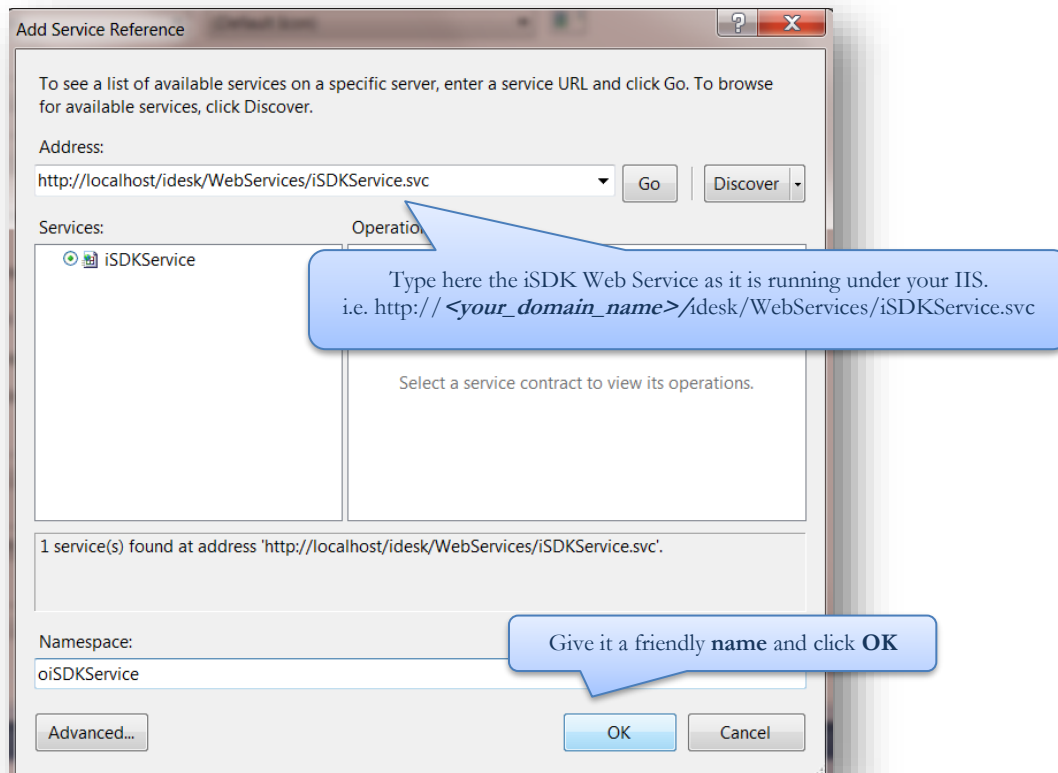
VB Code Example implementation:

1. In your solution you add new Service Reference,

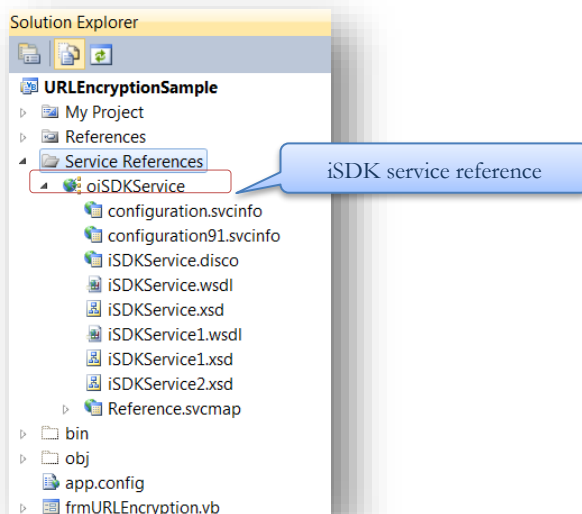


2. To Add the iSDK Service:

Once the service is found, you select it and press ok to add it into your solution.

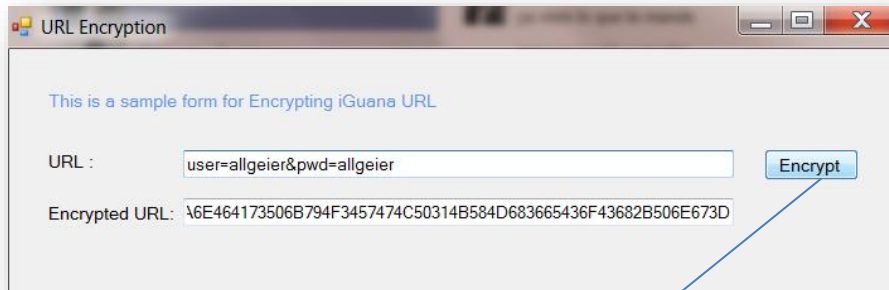


3. The new added service reference will be shown under the Service References



4. In the VB Code, you Need to call Encrypt Function of the Service with its parameters

Let's say you have a simple form, that you write a simple Text URL, and you click Encrypt, to give you the Encrypted URL string.



```
Public Class frmURLEncryption
```

```
Private Sub btnEncrypt_Click(sender As System.Object, e As System.EventArgs)
Handles btnEncrypt.Click
```

```
Dim myURL As String ' Variable to Store the URL to be encrypted
myURL = Me.txtURL.Text 'the URL entered in the Form
```

```
' Declare variable for the iSDK service
Dim MyService As oiSDKService.iSDKServiceClient = New
oiSDKService.iSDKServiceClient
' Declare variable for the iSDK Result
```

```
Dim myURLResult As String = MyService.Encrypt(myURL, True)
```

```
' Show the result into the form
Me.txtEncryptedURL.Text = myURLResult
End Sub
```

```
End Class
```

Service Declaration

Service Call with its parameters

Result URL

External Application URL Sytanx

The URL that we need for searching as external user has the following Syntax:

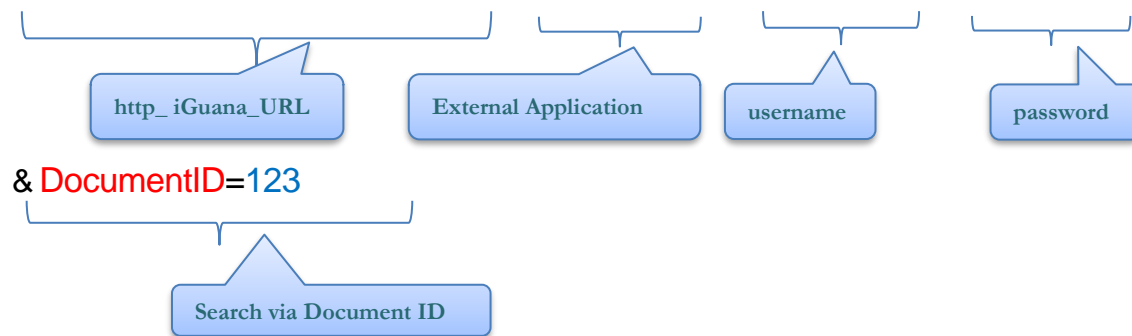
URL Syntax
<code><http_ iGuana_ URL>? Source=SAP&User=user name&Pwd=password& <combination_of_parameters_to_search></code>

Example 1: (Simple Search)

Let's Say I want to get results for a specific Document with Document ID =123.

This is how the URL syntax would look:

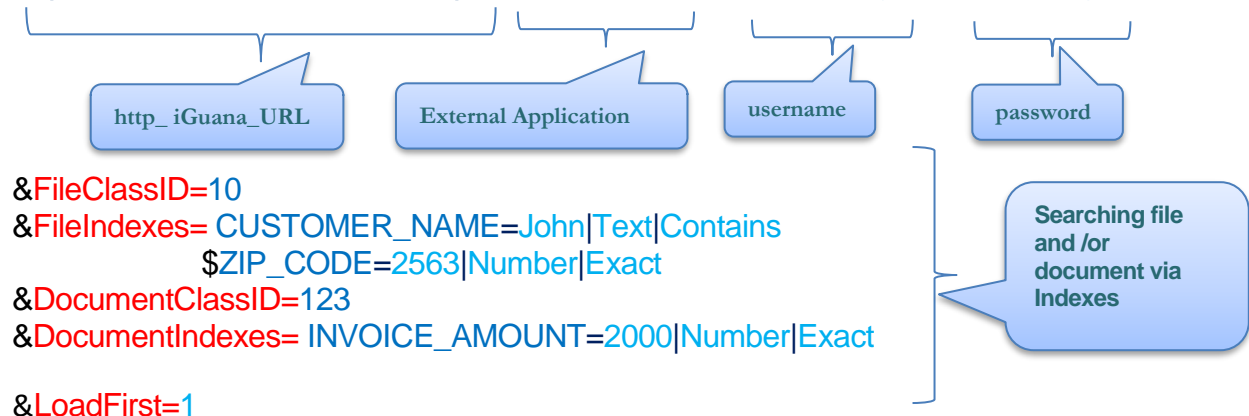
`http://localhost/iDesk/iDesk.aspx? Source=SAP&User=allgeier&Pwd=allgeier`



Example 2: (Advanced Search)

In this example, I don't have a specific Document id and we will build a more complex url Syntax:

`http://localhost/iDesk/iDesk.aspx? Source=SAP & User =allgeier&Pwd=allgeier`



The following table explains the **File** or **Document** Parameters:

Parameter Names	Document ID FileClassID DocumentClassID LoadFirst
Syntax	This can be a numeric Value <i>DocumentID=Document ID</i> <i>FileClassID=File class ID</i> <i>DocumentClassID=Document class id</i> i.e. <i>DocumentID=111222</i> <i>FileClassID=123</i> <i>DocumentClassID=456</i>
Combining more than one Parameters	Use the symbol & to combine more than one parameters i.e. <i>FileClassID=10&DocumentClassID=456</i>
Multiple Document IDs	Use the symbol , (comma) for multiple Documents i.e. <i>DocumentID =100,101,103</i> These documents are loaded directly in the document viewer.(Each Document in a different Tab)
LoadFirst	Defines the number of documents in result list that will be loaded in the document viewer. i.e <i>LoadFirst =1</i> or <i>LoadFirst =5</i>

The following table explains the **Indexes** Parameters:

Parameter Names	FileIndexes DocumentIndexes
Syntax	<p>FileIndexes=Index Name 1=Value Type Mode or DocumentIndexes=Index Name 1=Value Type Mode \$Index Name 2=Value Type Mode i.e. DocumentIndexes=INVOICE_AMOUNT=2000/Number/Exact</p>
Value Type Mode	<p>The Value Type Mode define:</p> <ul style="list-style-type: none"> The Value of the Index Parameter If the Value of the parameter is of type: (Text, Number, Date, TrueFalse) Mode of Search (Exact, Contains, Starts, Ends) i.e. INVOICE_AMOUNT=2000/Number/Exact FILE_CREATED=01/01/2013/Date/Exact Note: If you omit the mode the default is exact ie. INVOICE_AMOUNT=2000/Number
Combining more than one Index Parameters	<p>Use the symbol \$ to combine more than one Index parameters i.e. FileIndexes= CUSTOMER_NAME=John/Text/Contains \$ZIP_CODE=2563/Number/Exact</p>
Order by (<i>*new</i>) INDEX_NAME= Asc INDEX_NAME= Desc	<p>To add sorting on the indexes You can add the keyword Asc or Desc (Ascending means from 0-9 / A to Z and Descending means from 9-0 / Z to A i.e. INVOICE_AMOUNT=2000/Number/Exact/Asc FILE_CREATED=01/01/2013/Date/Exact/Desc Or you can just have the order, with empty values. i.e. INVOICE_AMOUNT= /Asc</p>

--	--

iDesk

URL syntax for iDesk

As we have explained in the previous section, we need to build a URL syntax to be able to call iGuana as External Application. We explained the syntax, the symbols and we have given examples.

In this section we can see specifically for iDesk, the template syntax. By editing the correct values you can get the search results.

Searching document via Document ID

`http://Servername/iDesk/iDesk.aspx? Source=SAP&User=username &Pwd=password
&DocumentID=Document ID`

Tip: Searching via Document number, will return only one Document.

Searching file or/and document via Indexes

`http://Servername/iDesk/iDesk.aspx? Source=SAP&User=user name&Pwd=password
&FileClassID=File class ID&FileIndexes=Index Name 1=Value|Type|Mode$Index Name
2=Value|Type|Mode&DocumentClassID=Document class id&DocumentIndexes=Index Name
1=Value|Type|Mode$Index Name 2=Value|Type|Mode
&LoadFirst=1`

Tips:

The above is the complete syntax. You can use combinations by using only the parameters you wish to have the desired results.

You can use the LoadFirst Parameter to automatically Load the number of Documents you wish

iView

URL syntax for iView

iView works in the same way with iDesk, but it only gives a search result for a simple Document.

In this section we can the iView template syntax and just editing the correct values you can get the search results.

Searching document via Document ID

`http://Servername/iDesk/iView.aspx? Source=SAP&User=user name&Pwd=password&DocumentID=Document ID`

Searching document via Indexes

`http://Servername/iDesk/iView.aspx? Source=SAP&User=user name&Pwd=password &DocumentIndexes=Index Name 1=Value|Type|Mode$Index Name 2=Value|Type|Mode &LoadFirst=1`

Tip: Use the LoadFirst Parameter to automatically Load the number of Documents you wish

iScan

As we have explained in the previous section, we need to build a URL syntax to be able to call iGuana as External Application. We explained the syntax, the symbols and we have given examples.

In this section we can see specifically for iScan the template syntax. By editing the correct values you can set a Document class and prefilling the Indexes.

Scan document

`http://Servername/iDesk/iScan.aspx? Source=SAP&User=user name&Pwd=password &DocumentClassID=Document class id&DocumentIndexes=Index Name 1=Value|Type$Index Name 2=Value|Type`