



ImageQuest

WebIQ User's Guide

Version 15.4



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Introduction to WebIQ

WebIQ provides a web front-end for PC, Mac and mobile users to allow for searching and viewing ImageQuest documents without the need to install a local copy of the ImageQuest client on each device. WebIQ also allows users to edit attribute values and participate in workflow approvals.

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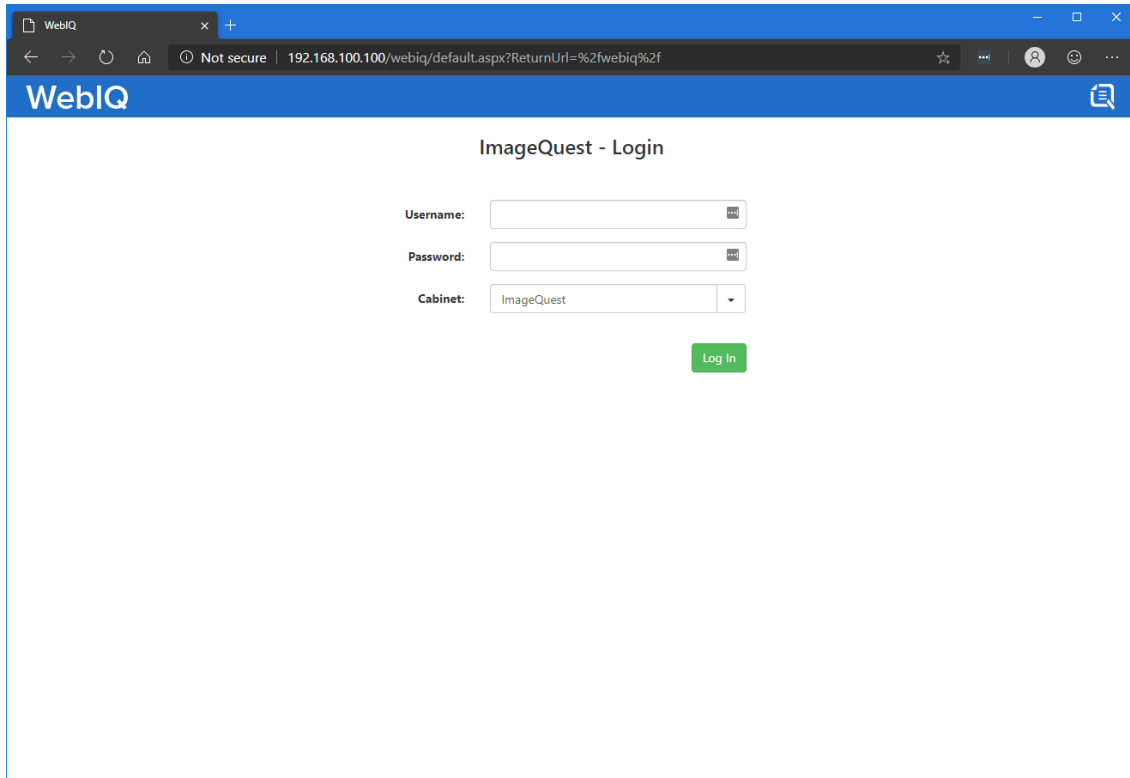
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<https://www.informasoftware.com/wp/support>

Getting Started

To access the WebIQ client, open a web browser and type in the URL to the WebIQ application server (*typically <http://IQservername/WebIQ>*). Ask the system administrator if you do not know the WebIQ URL. If your ImageQuest user account is setup to use Active Directory Single Sign-on, you will be taken directly to the search screen or the cabinet selection screen if you have multiple cabinets. If you are not using Active Directory Single Sign-on, you will be taken to the ImageQuest Login Page.



The screenshot shows a web browser window with the title 'WebIQ'. The address bar displays 'Not secure | 192.168.100.100/webiq/default.aspx?ReturnUrl=%2fwebiq%2f'. The page content features a blue header with the 'WebIQ' logo and a speech bubble icon. Below the header, the page is titled 'ImageQuest - Login'. It contains three input fields: 'Username:' with a text box and a password icon, 'Password:' with a text box and a password icon, and 'Cabinet:' with a dropdown menu showing 'ImageQuest'. A green 'Log In' button is positioned below the 'Cabinet' field.

Figure 1 - WebIQ Login Page for non-SSO users

Once you are logged in, the search screen will appear. 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.

Figure 2 - WebIQ Search Screen

Users can specify a specific document type search on by choosing the document type from the dropdown list. By selecting a single Document Type, the list of all available attributes is changed to reflect only those attributes associated with that Document Type.

After entering the search criteria and clicking the green search button at the bottom of the window, the search results will appear in a grid. ImageQuest system attributes are hidden by default.

The screenshot shows a web browser window with the URL `192.168.100.100/webiq/results.aspx?searchcriteria=(%5bDocumentType%5d+%3d+%27Invoice%27)&k...`. The page title is "WebIQ" and there is a "Menu" button in the top right. Below the header, there is a "Show System Attributes" toggle switch. A text prompt says "Drag a column header here to group by that column". The main content is a table with the following columns: View, Edit, Notes, Date, Invoice Amount, Wire, Shipment Invoice Number, Date Received, Appointment, PO Number, Invoice Number, Invoice Date, and DocumentType. The table contains 15 rows of data, with some rows having values in the Date and Invoice Amount columns.

View	Edit	Notes	Date	Invoice Amount	Wire	Shipment Invoice Number	Date Received	Appointment	PO Number	Invoice Number	Invoice Date	DocumentType
												Invoice
									00431864	100841483	7/24/2018	Invoice
									00431970	100841819	7/24/2018	Invoice
									00430727	100842026	7/24/2018	Invoice
									00430727	100842027	7/24/2018	Invoice
									00432029	100842037	7/24/2018	Invoice
									00431928	100842324	7/24/2018	Invoice
									00431963	100842328	7/24/2018	Invoice
									432000	100842399	7/24/2018	Invoice
			11/1/2007	486.20000000								Invoice
												Invoice
												Invoice
			6/4/2014									Invoice
												Invoice

Figure 3 - Search Results

Click the slider button at the top of the window to see the system attributes if needed (PageCount, FileType & CreateDateTime). If the screen is too narrow, an additional column will show up with the ellipsis symbol on the far right. Clicking on the 3 dots will expand the row and show the remaining attributes that were previously cut off. Click the X symbol to collapse the row.

View	Edit	Notes	Date	Invoice Amount	Wire	Shipment Invoice Number	Date Received	Appointment	PO Number	Invoice Number	Invoice Date	DocumentType	DocumentGroup	PageCount	FileType	
												Invoice		1	PDF	
CreateDateTime : 10/10/2019 2:54:45 PM																X
									00431864	I00841483	7/24/2018	Invoice		1	PDF	
CreateDateTime : 7/30/2018 11:03:12 AM																X
									00431970	I00841819	7/24/2018	Invoice		1	PDF	...
									00430727	I00842026	7/24/2018	Invoice		1	PDF	...
									00430727	I00842027	7/24/2018	Invoice		1	PDF	...
									00432029	I00842037	7/24/2018	Invoice		1	PDF	...
									00431928	I00842324	7/24/2018	Invoice		1	PDF	...
									00431963	I00842328	7/24/2018	Invoice		1	PDF	...
									432000	I00842399	7/24/2018	Invoice		1	PDF	...
			11/1/2007	486.20000000								Invoice	Processing	1	pdf	...
												Invoice	Processing	1	pdf	...
												Invoice		1	TIF	...
												Invoice		1	TIF	...

Figure 4 - Search Results showing system attributes and 2 expanded rows

If the search grid contains more than 20 results, a page indicator will appear at the bottom of the grid allowing the user to select additional pages to see more results. If the user is using a touch screen device, the grid can be swiped left and right to navigate between the different pages.



Figure 5 - Page Selector

View, Edit and Note Columns

The first column of the search results contains the View Icon. Click this icon to view the document image for that particular record. Depending on the web browser that is being used or the file type that is being selected, the image will either open in a new tab/window, or the file may be downloaded. Tiff files will be converted to PDF files on the fly for viewing purposes only.

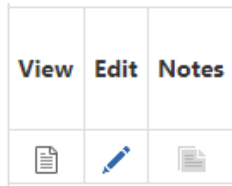


Figure 6 - View, Edit and Notes columns and icons

If the logged in user has the update document permission, the Edit icon will be visible indicating that the attribute values for that record may be modified if necessary. Clicking the pencil icon will bring up the Update Attributes screen.

Figure 7 - Update Attributes Screen

If the user updates any of the attributes and then clicks the save button, they will be brought back to the search results and the search grid will reflect any changes that were made to that record.

Note: The edit column will not be visible if the user does not have the update document permission.

Note: Document history is also recorded when viewing or editing documents from WebIQ. However, the document history can only be viewed from the IQdesktop client.

Notes may also be added or viewed by clicking the Notes icon. A gray icon indicates that there are no notes on a document while a yellow icon indicates notes were added previously. Clicking the icon allows the user to add a note to the document as well as see any previous notes that were added. If the user does not have the update document permission, the user will not be able to add a note, but they will see any notes that were previously added.

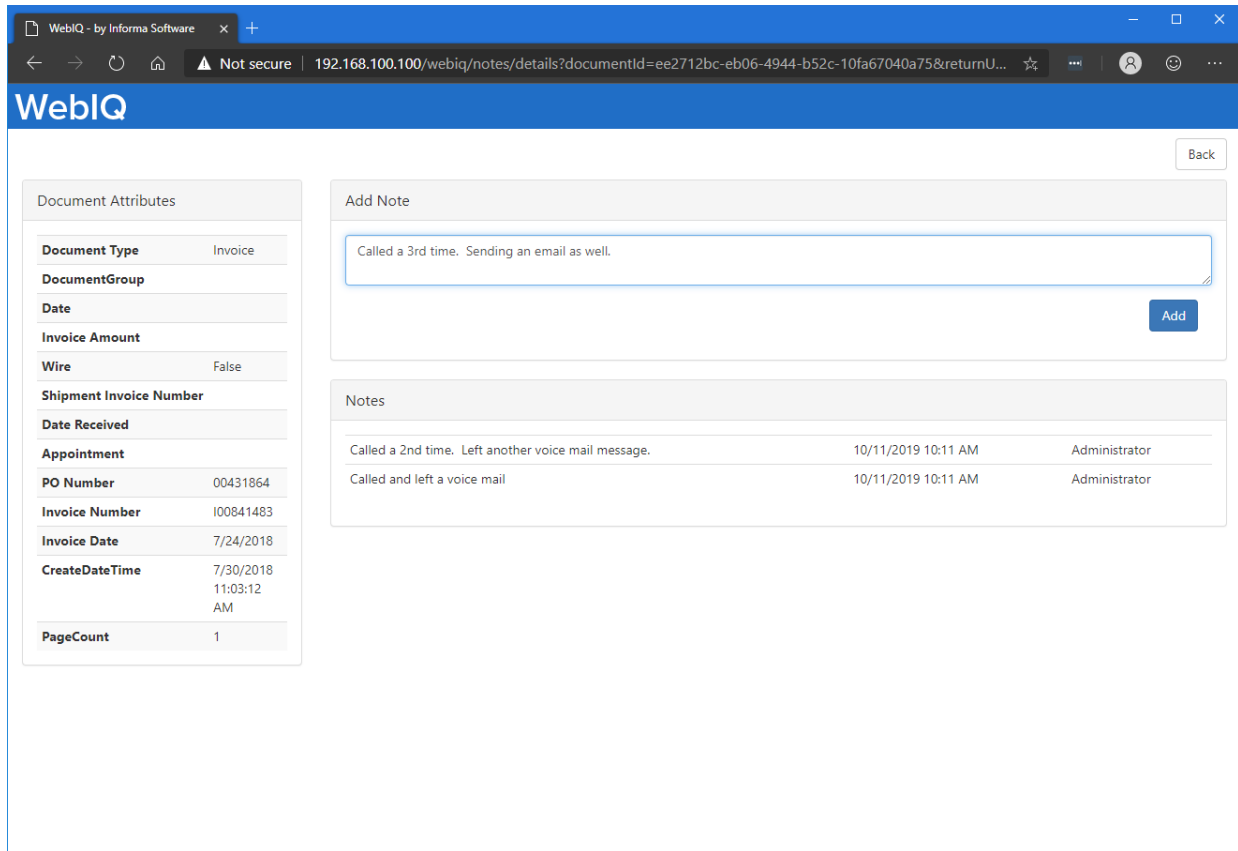


Figure 8- Notes screen showing two existing notes and adding a 3rd.

Click the back button in the upper right side of the screen to be taken back to the search results.

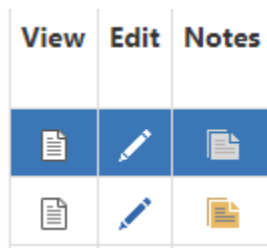


Figure 9 - The Note icon will be yellow if the document has at least one note

Search Grid Customization

The search grid may be customized in a several different ways. Click on the column header once to sort the contents ascending or twice for descending. The user may hold down the shift key while clicking a column to sort additional fields. An arrow appears next to the column heading to indicate which way they are being sorted.

<u>PO Number</u> ↑	<u>Invoice Number</u> ↓
432000	I00842399
00431963	I00842328
00431928	I00842324
00432029	I00842037
00430727	I00842027

Figure 10 - The Invoice Number column is sorted descending and then the PO Number column is sorted ascending

Columns may also be rearranged by clicking and holding the column header and then dragging it to a new location. A black arrow above the grid will indicate the new position of the column when the mouse button is released.

Drag a column header here to group by that column

View	Edit	Notes	Date	<u>Invoice Number</u> ↓	Wire	Shipment Invoice Number	Date Received	Appointment	<u>PO Number</u> ↑	<u>Invoice Number</u> ↓	In D
					✓				432000	I00842399	7/
									00431963	I00842328	7/
									00431928	I00842324	7/
									00432029	I00842037	7/

Drag a column header here to group by that column

View	Edit	Notes	Date	<u>Invoice Number</u> ↓	Invoice Amount	Wire	Shipment Invoice Number	Date Received	Appointment	<u>PO Number</u> ↑	In D
				I00842399		✓				432000	7/
				I00842328						00431963	7/
				I00842324						00431928	7/
				I00842037						00432029	7/

Figure 11 - The Invoice Number column was moved to the left

The Group By box may be used to group the grid by one or more columns. To group a column, click and drag the column to the Group By box until you see the black up and down arrows. Release the mouse button to release the column. The grid will update to show the column name in the grid with arrows next to each row.

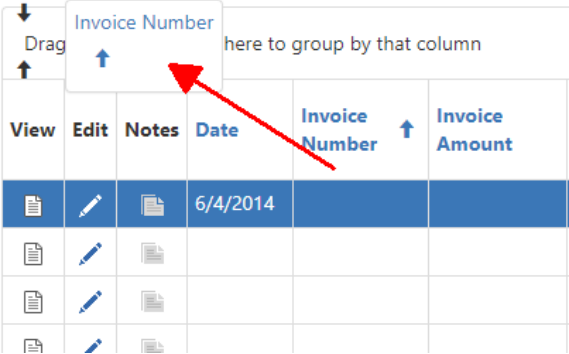


Figure 12 - Dragging Invoice Number to the Group By Box

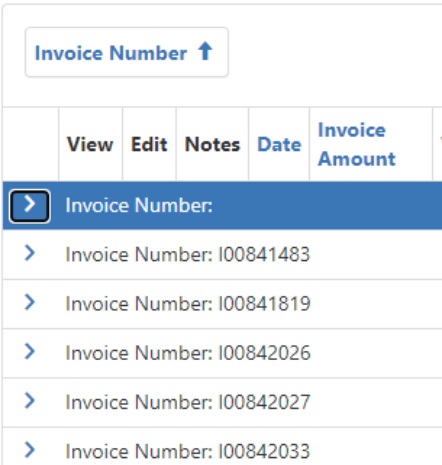


Figure 13 - Search Grid Grouped By Invoice Number

Click the arrow in the far-left column to expand the selection to see the documents for that grouping.

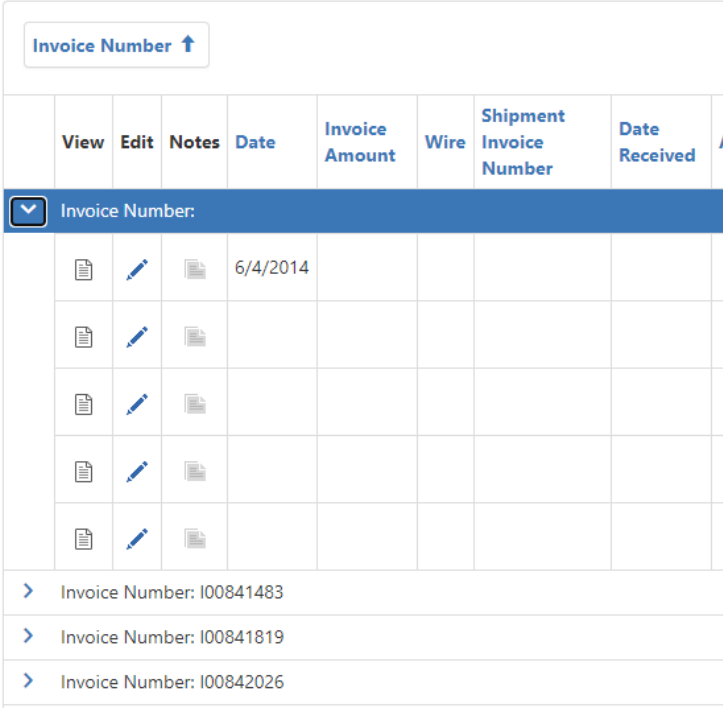


Figure 14 - The first Invoice Number Group is expanded

Note: Customizations apply to the current search only.

The Menu button at the top-right of the screen can be used to perform a new search, change the cabinet if multiple cabinets exist, or log out of the system.

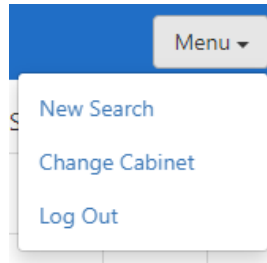


Figure 15 - WebIQ Menu Button

Completing Work Items

There are three different types of work items that can be completed using WebIQ: Workflow items, Routed items and Notification items. These screens can only be accessed via the hyperlink in the notification email that is sent when the item first enters the Work Queue. The following screen appears when clicking the Complete Work Item link for a Routed or Notification item:

 The screenshot shows the 'Complete Work Item' screen in the WebIQ application. The page has a blue header with the 'WebIQ' logo and a 'Menu' button. The main content area is divided into two columns. The left column contains 'Work Item Information' and 'Route Document' sections. The right column contains an 'Update Attributes' form with various input fields. At the bottom, there are three buttons: 'Reassign', 'Save', and 'Cancel'.

Work Item Information	
Assigned To	Administrator (User)
Action	Routed
Age	01:10:15
	View Image

Route Document	
Route to	<input type="text"/>
Message	<input type="text"/>

Update Attributes	
Document Type	<input type="text" value="Invoice"/>
Changing Document Type will reload the attribute list and lose any changes. (A blank page indicates that the assigned document type is invalid or has been deleted.)	
DocumentGroup	<input type="text"/>
Date	<input type="text"/>
Invoice Amount	<input type="text"/>
Wire	<input type="text" value="False"/>
Shipment Invoice Number	<input type="text"/>
Date Received	<input type="text"/>
Appointment	<input type="text"/>
PO Number	<input type="text" value="00432029"/>
Invoice Number	<input type="text" value="I00842037"/>
Invoice Date	<input type="text" value="7/24/2018"/>

Figure 16 – Complete Work Item Screen for Notification and Routed Items

The user may update any attributes if necessary and then click the Save button to complete the work item, removing it from their work queue. They may also choose to route the item to someone else by using the drop-down list or they can choose to Reassign the item to another user or role. Routing a document keeps the item in the original work queue while Reassigning it moves the item to the new work queue.

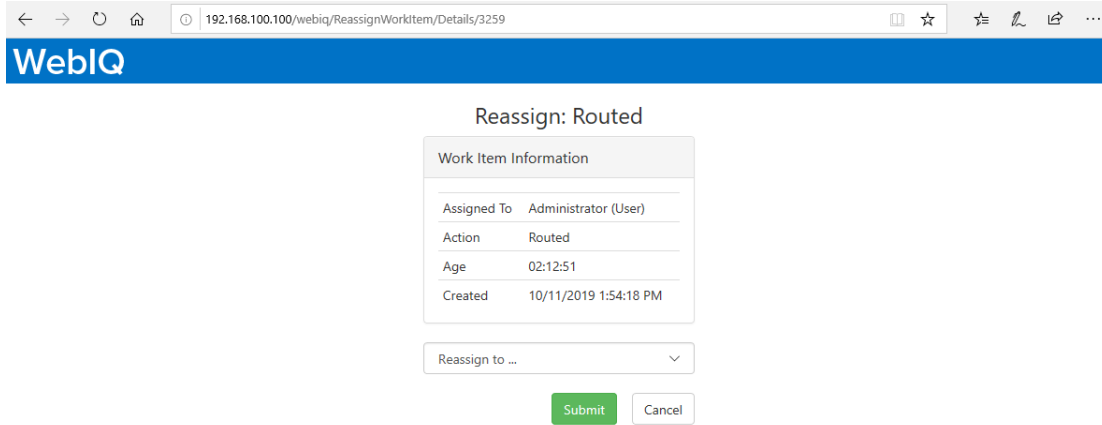


Figure 17 - Reassigning a work item

When completing a work item for a Workflow item, the following screen will be presented to the user:

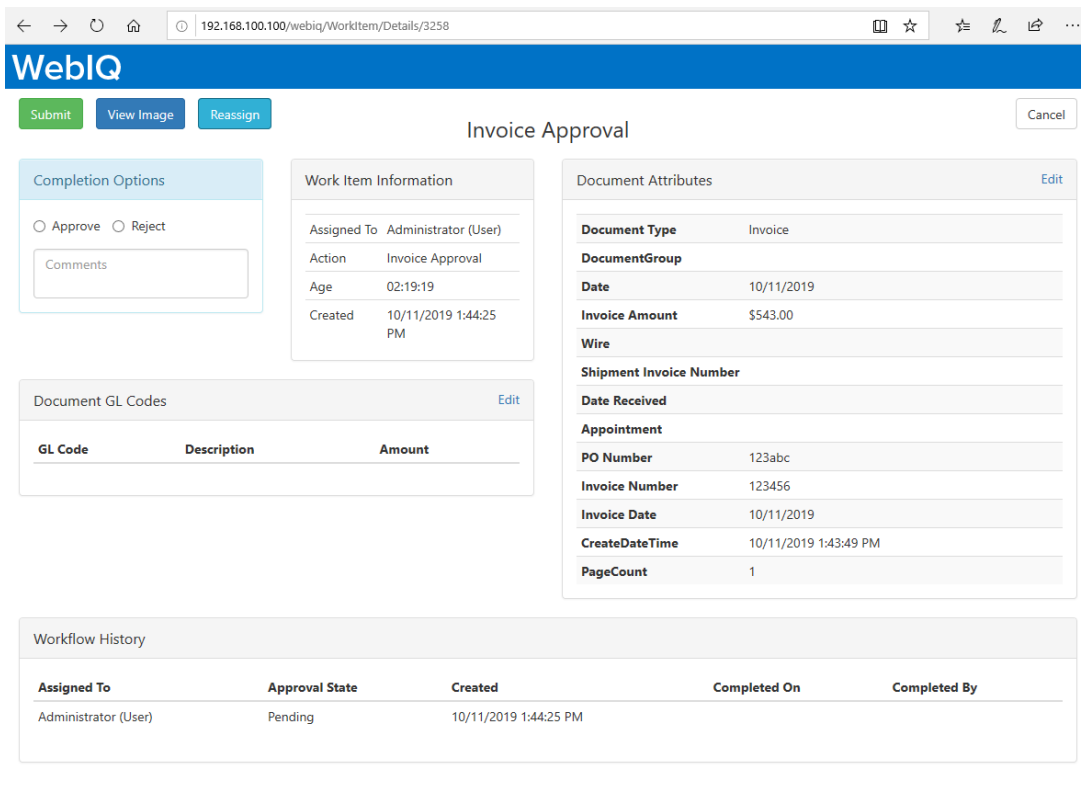


Figure 18 - Workflow Approval Screen

The Workflow Approval screen shows the title of the workflow definition, in this case it is Invoice Approval. Users can Approve or Reject workflow items from here as well as add any comments that will appear in the workflow history in IQdesktop. The workflow history also appears at the bottom of the screen. If this activity requires adding or reviewing GL Codes, the Document GL Codes section will appear. Click the Edit button in this section to edit the GL Codes.

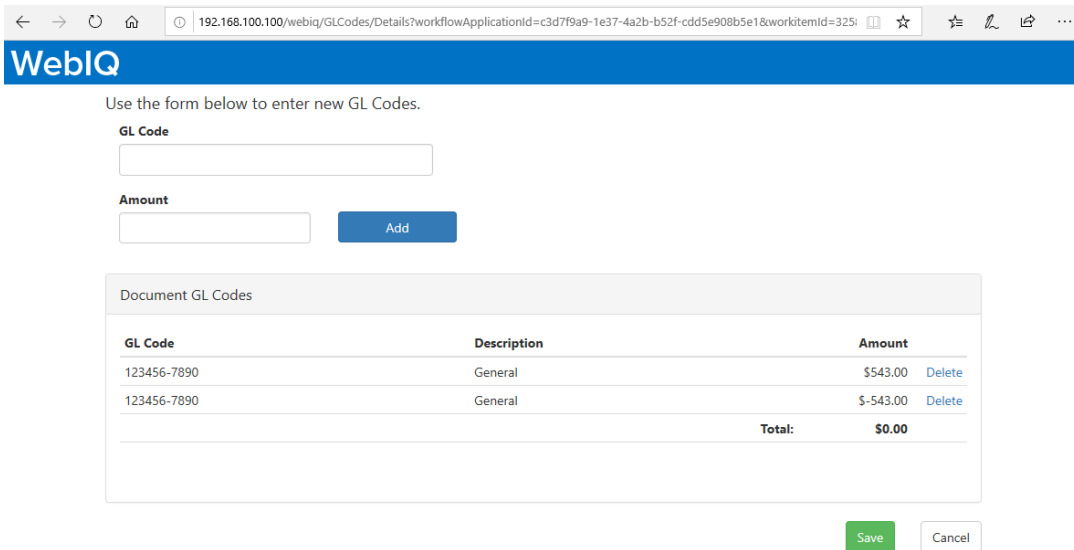


Figure 19 – GL Coding screen

The user may add or delete GL Codes from this screen. When finished, clicking the Save button will bring the user back to the previous screen.

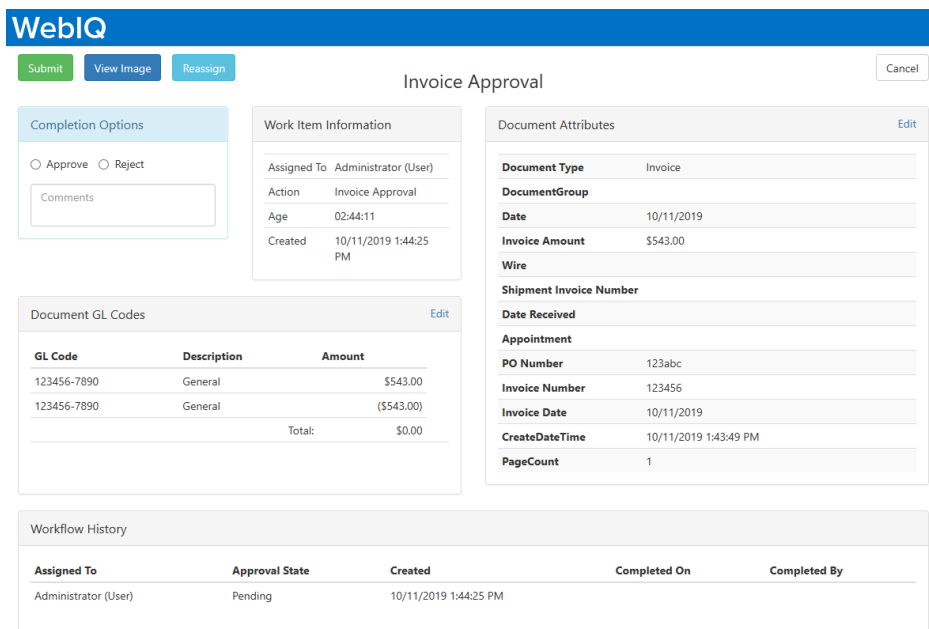


Figure 20 - Workflow Approval screen with GL Codes

Users may also edit Document Attributes, Reassign the work item or view the image via the buttons at the top. Clicking submit after selecting Approve or Reject will move the work item to the next activity in the workflow.

Note: Users must have the Update Document permission in order to complete work items.

WebIQ Connect

WebIQ Connect allows administrators to integrate existing external systems with ImageQuest by providing a special endpoint that can be queried to return a list of documents or the actual document image. This allows users of other applications to view documents without exiting the application to manually search IQdesktop or WebIQ.

The endpoint is SearchExt.aspx and can be access via the following URL:

[http://iqservername/webiq/searchext.aspx?cabinet=IQCabinetName&query=\(query-statement-here\)](http://iqservername/webiq/searchext.aspx?cabinet=IQCabinetName&query=(query-statement-here))

Query String Parameters

The question mark character separates the URL from all the parameters being sent to WebIQ. The valid values after the question mark in the URL are as follows:

Cabinet	Specifies the IQ cabinet that the search will be applied
Autodisplay	When this value is set to 1, it returns the actual document image if only one result is returned. If it is absent or set to 0, the search results are returned.
Query	The IQQL search to be performed - must be URL encoded
&	Used to separate query parameters

Table 1 - Query String Parameters

Query Syntax

The syntax for the query statement uses IQQL - ImageQuest Query Language. Some examples of queries are as follows:

[DocumentType] = 'invoice' and [invoice number] = '123456'

[EmployeeID] = IN ('111-222-333', '222-333-444')

Note: Please see the ImageQuest Administrator's Guide for more information on saved queries.

The query part of the URL needs to be URL encoded. When information is passed through a URL, it should only use specific allowed characters. These allowed characters include alphabetic characters, numerals, and a few special characters that have meaning in the URL string. Any other characters that need to be added to a URL should be encoded so that they don't cause problems issuing the query.

Here are some common character encodings that are often used with WebIQ Connect:

%5B	[
%5D]
%28	(
%29)
%3D	=
%27	' (single apostrophe character)
%20	SPACE

Table 2 - Common URL Encodings

For example, let's say you want to query WebIQ to return any invoice number equal to 123456. Here is what the IQQL query would look like:

```
[DocumentType] = 'invoice' and [invoice number] = '123456'
```

Here is that same query URL encoded:

```
%5BDocumentType%5D%20%3D%20%27invoice%27%20and%20%5Binvoice%20number%5D%20%3D%20%27123456%27
```

Finally, here is the URL that is issued to call WebIQ to display invoice number 123456 using the autodisplay parameter:

```
http://iqservername/webiq/searchext.aspx?cabinet=theiqcabinetname&autodisplay=1&query=(%5BDocumentType%5D%20%3D%20%27invoice%27%20and%20%5Binvoice%20number%5D%20%3D%20%27123456%27)
```

There are many different websites that explain how to encode and decode URLs. Below are two sites that can help make encoding and decoding characters easier if you need assistance:

<http://meyerweb.com/eric/tools/dencoder>

http://www.w3schools.com/tags/ref_urlencode.asp

User Login

If WebIQ is enabled for single sign-on, the user will be taken directly to the search results, or the document display if autodisplay is used.

If the user is required to login using an ImageQuest only account, they will first see the WebIQ login screen. Since the cabinet name is supplied in the URL, the user will not be able to select a different cabinet, unlike standard WebIQ login functionality.

All IQ permissions for the user are honored and history entries are appropriately recorded when documents are viewed.