

# IkeaDocuScan User Quick Guide

5-Minute Overview for Users Familiar with Document Management

## USER ROLES & ACCESS MATRIX

### Role-Based Navigation Menu Access

Navigation Menu Item	Reader	Publisher	SuperUser
DOCUMENT MANAGEMENT			
Register Document	<input type="checkbox"/> No Access	<input type="checkbox"/> Create/Edit	<input type="checkbox"/> All
Search Documents	<input type="checkbox"/> View	<input type="checkbox"/> View/Email	<input type="checkbox"/> All/Delete
Check-in Scanned	<input type="checkbox"/> No Access	<input type="checkbox"/> Check-in	<input type="checkbox"/> All/Delete
Action Reminders	<input type="checkbox"/> No Access	<input type="checkbox"/> View/Export	<input type="checkbox"/> All
SPECIAL REPORTS			
Barcode Gaps	<input type="checkbox"/> View/Export	<input type="checkbox"/> View/Export	<input type="checkbox"/> All
Duplicate Documents	<input type="checkbox"/> View/Export	<input type="checkbox"/> View/Export	<input type="checkbox"/> All
Unlinked Registrations	<input type="checkbox"/> View/Export	<input type="checkbox"/> View/Export	<input type="checkbox"/> All
Scan Copies	<input type="checkbox"/> View/Export	<input type="checkbox"/> View/Export	<input type="checkbox"/> All
Suppliers	<input type="checkbox"/> View/Export	<input type="checkbox"/> View/Export	<input type="checkbox"/> All
ADMINISTRATION			
User Permissions	<input type="checkbox"/> No Access	<input type="checkbox"/> No Access	<input type="checkbox"/> Full Access
Currency	<input type="checkbox"/> No Access	<input type="checkbox"/> No Access	<input type="checkbox"/> Create/Edit/Delete
Country	<input type="checkbox"/> No Access	<input type="checkbox"/> No Access	<input type="checkbox"/> Create/Edit/Delete
Document Type	<input type="checkbox"/> No Access	<input type="checkbox"/> No Access	<input type="checkbox"/> Create/Edit/Delete
Counter Party	<input type="checkbox"/> No Access	<input type="checkbox"/> No Access	<input type="checkbox"/> Create/Edit/Delete
Document Names	<input type="checkbox"/> No Access	<input type="checkbox"/> No Access	<input type="checkbox"/> Create/Edit/Delete
SETTINGS			
Configuration	<input type="checkbox"/> No Access	<input type="checkbox"/> No Access	<input type="checkbox"/> Full Access
Audit Trail	<input type="checkbox"/> No Access	<input type="checkbox"/> No Access	<input type="checkbox"/> Full Access

### Role Capabilities Summary

**Reader (View-Only):** - Search and view documents (filtered by permissions) - View all reference data - Export reports to Excel - View action reminders - View audit trail - **Cannot:** Create, edit, delete, or send emails

**Publisher (Content Manager):** - All Reader capabilities - Create and edit documents - Check-in scanned files - Send emails with document attachments - **Cannot:** Delete documents, manage users, modify reference data

**SuperUser (Administrator):** - All Reader and Publisher capabilities - Delete documents and scanned files - Manage all reference data (currencies, countries, document types, counter parties) - Manage user permissions - Configure system settings - View all data without permission filters

## Permission Filtering

**Document Access:** - Reader & Publisher: See only documents matching their assigned permissions (Document Type, Country, Counter Party) - SuperUser: See all documents regardless of permissions

**Reference Data:** - All roles can view currencies, countries, document types, counter parties - Only SuperUser can create, edit, or delete reference data

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## □ DOCUMENT MANAGEMENT

**Document Properties Page** (/documents/register, /documents/edit/{barcode}, /documents/checkin/{filename})

**Purpose:** Create, edit, or check-in documents with comprehensive metadata. This page operates in three distinct modes:

### **Mode 1: Register Mode** (/documents/register)

Create a new document **without a file** - manual barcode entry required.

**Use Case:** Pre-register a document before the physical file arrives or is scanned.

**Workflow:** 1. Navigate to /documents/register (or click “Register Document” in nav menu) 2. **Manually enter barcode** in the barcode field (no auto-generation) 3. Select document type (affects required fields - mandatory fields marked with red asterisk) 4. Choose counter party and third party (autocomplete search - start typing) 5. Fill in financial details: currency, amount, dates (contract, receiving, action) 6. Set document flags: Fax, Original, Confidential, Bank Confirmation (True/False radio buttons) 7. Add comments, action description, version number 8. Click Save (file can be attached later via Edit mode or Check-in)

**Key Point:** Barcode must be entered manually. No file is attached in this mode.

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### **Mode 2: Check-In Mode** (/documents/checkin/{filename})

Register a new document **with a scanned file** - barcode extracted from filename.

**Use Case:** Physical document has been scanned to network folder and needs to be registered.

**Workflow:** 1. Scanner saves PDF to network folder (filename should contain barcode, e.g., 12345.pdf or Invoice\_12345.pdf) 2. Navigate to “Check-in Scanned” page (/checkin-scanned) 3. Search for your file in the file list 4. Click “Check In” button on the file row 5. System extracts barcode from filename (e.g., 12345 from 12345.pdf) 6. Page opens in Check-In mode with: - **Barcode field pre-filled** (read-only, extracted from filename) - **File already attached** (name shown, clickable to preview) - Empty form fields ready for data entry 7. Fill in document metadata (same fields as Register mode) 8. Click Save to create document record with file attached

**Two Scenarios:** - **Scenario A:** Barcode doesn't exist in system → Creates new document with file (warning shown) - **Scenario B:** Barcode exists without file → Loads existing document data, attaches file on save (success message shown) - **Scenario C:** Barcode exists with file → Error, cannot overwrite existing file

**Key Point:** Barcode comes from filename, not manual entry. File is attached immediately upon save.

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### **Mode 3: Edit Mode** (/documents/edit/{barcode})

Modify an existing document's properties.

**Use Case:** Update metadata for an already-registered document.

**Workflow:** 1. Search for document in "Search Documents" page 2. Click document row or barcode link to open properties 3. Page opens with barcode **read-only** (cannot change) 4. Modify any field (document type, counter party, dates, flags, comments) 5. Click Save to update (audit trail logs all changes)

**Key Point:** Barcode cannot be changed. Existing file (if any) is preserved.

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**Common Features Across All Modes:** - **Dynamic Field Validation:** Required fields change based on document type selection - **Counter Party/Third Party Autocomplete:** Keyboard navigation (arrow keys, Enter) - **Duplicate Detection:** System warns if similar documents exist before saving - **Copy/Paste:** Copy data from one document to another (stored in browser for 10 days) - **Field Visibility Rules:** Some fields hidden/shown based on document type configuration - **Unsaved Changes Warning:** Browser warns if you try to navigate away without saving - **Real-time Validation:** Instant feedback on required fields and format errors

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## Search Documents (/documents/search)

**Purpose:** Advanced multi-criteria document search with export capabilities.

**Key Features:** - **PDF Content Search:** Full-text search within PDF files - **Barcode Lookup:** Search single or multiple barcodes (comma-separated) - **Multi-Select Filters:** Document types, counter parties, countries, currencies - **Date Range Filters:** Contract date, receiving date, action date - **Boolean Filters:** Fax, Original, Confidential, Bank Confirmation (with clear buttons) - **Advanced Options:** Version number, document number, comment search - **Result Actions:** - Open document properties (view/edit) - Preview PDF inline - Send email with document - Export results to Excel - **Keyboard Navigation:** Use arrow keys in dropdowns, Enter to select

**Search Tips:** - **Leave filters empty to show all documents** (limited to first 1,000 results - refine search if limit reached) - Use partial names for counter party search - PDF search queries database index (instant results) - Click column headers to sort results - Clear individual filters with X button - If "Max limit reached (1000)" badge appears, add more filters to narrow results

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## Check-in Scanned (/checkin-scanned)

**Purpose:** Import scanned files from network folder into document system.

**Key Features:** - **File Browser:** View all files in configured scanned folder - **File Preview:** See file details (size, modified date, type) - **Search & Sort:** Filter files by name, sort by any column - **Barcode Extraction:** Automatically detect barcode from filename - **Link to Document:** Associate scanned file with existing document record - **File Actions:** Preview, check-in, or delete scanned files - **Pagination:** Navigate large file lists efficiently - **Refresh:** Manually reload file list (60-second cache)

**Common Workflow:** 1. Scanner saves PDF to network folder 2. Open Check-in Scanned page 3. Search for file by name or barcode 4. Click "View Details" to preview 5. System suggests matching barcode from filename 6. Confirm or edit barcode 7. Check-in attaches file to document record

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## Action Reminders (/action-reminders)

**Purpose:** Track documents with upcoming or overdue action dates.

**Business Rules - Which Documents Appear:** - Document MUST have an ActionDate set (not null) - ActionDate MUST be on or after ReceivingDate (validation rule)

**Visual Status Indicators:** - ☐ **Overdue** (Red row + Red badge): ActionDate < Today (past due) - ☐ **Due Today** (Yellow row + Yellow badge): ActionDate = Today - ☐ **Due This Week** (Blue badge): ActionDate between tomorrow and 7 days from today - ☐ **Future** (Gray badge): ActionDate more than 7 days in the future

**Quick Filters:** - **Today:** Shows only actions due today (excludes overdue and future) - **Overdue:** Shows only past-due actions (ActionDate < Today) - **This Week:** Sunday to Saturday of current week (includes overdue, today, and upcoming) - **This Month:** 1st to last day of current month (includes overdue, today, and upcoming)

**Key Features:** - **Custom Date Range:** Filter by specific date range (DateFrom - DateTo) - **Search Filters:** Document type, counter party, barcode, comment, action description - **Clickable Barcodes:** Click any barcode to open document properties page - **Excel Export:** Download filtered results as spreadsheet - **Collapsible Filters:** Hide filter panel for more screen space - **Real-time Count:** Badge shows total action reminders matching filters

**Default View on Page Load:** - Opens with “Today” filter active (shows actions due today only)

**Use Cases:** - Daily review: Check “Today” and “Overdue” filters each morning - Follow-up: Use “Overdue” filter to identify past-due documents - Weekly planning: “This Week” shows all actions in current week - Reporting: Export filtered results for team meetings

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## ☐ SPECIAL REPORTS

All reports accessible via **Excel Preview** page with export to Excel functionality.

### **Barcode Gaps (/excel-preview?reportType=barcode-gaps)**

**Purpose:** Identify missing barcodes in sequential numbering system.

**Business Rule:** Uses SQL LEAD() window function to find gaps where Barcode + 1 ≠ NextBarcode.

**Report Shows:** - GapStart: First missing barcode in sequence - GapEnd: Last missing barcode in sequence - GapSize: Number of missing barcodes - PreviousBarcode: Last used barcode before gap - NextBarcode: First used barcode after gap

**Use Cases:** - Reclaim unused barcode numbers for new documents - Detect data issues (skipped numbers, deleted records) - Verify sequential numbering integrity

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### **Duplicate Documents (/excel-preview?reportType=duplicate-documents)**

**Purpose:** Identify documents with identical key properties that may be duplicate registrations.

**Business Rule:** Groups documents by (Document Type + Document No + Version No + Counter Party), returns groups with COUNT > 1.

**Report Shows:** - Document Type, Document No, Version No - Counter Party (No and Name) - Count: Number of documents in duplicate group

**Important:** Documents are only considered duplicates if ALL four criteria match (type, number, version, AND counter party).

**Use Cases:** - Data cleanup: Find accidentally double-registered documents - Quality control: Identify potential data entry errors - Audit: Verify uniqueness of document

identifiers

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### Unlinked Registrations (/excel-preview?reportType=unlinked-registrations)

**Purpose:** Find documents registered in system but without attached files.

**Business Rule:** Selects documents where `FileId IS NULL`.

**Report Shows:** - Barcode, Document Type, Document Name - Document No, Counter Party (Name and No)

**Use Cases:** - Follow-up on incomplete registrations (waiting for file check-in) - Identify documents registered before scanning - Track pending file attachments

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### Scan Copies (/excel-preview?reportType=scan-copies)

**Purpose:** Track fax copies waiting for physical original documents.

**Business Rule (Critical):** Selects documents where `Fax = 1 AND OriginalReceived = 0`.

**Report Shows:** - Barcode, Document Type, Document Name - Document No, Counter Party (Name and No)

**Business Scenario:** 1. Fax copy received and scanned (`Fax = True`) 2. Original physical document not yet arrived (`OriginalReceived = False`) 3. Document appears in this report until original is received

**Use Cases:** - Follow-up: Track which originals are still pending - Reminders: Contact counter parties for missing originals - Compliance: Ensure originals received for legal/audit purposes - **NOT** a general file inventory - only fax copies awaiting originals

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### Suppliers (/excel-preview?reportType=suppliers)

**Purpose:** List counter parties available in check-in dropdown for document registration.

**Business Rule (Critical):** Selects counter parties where `DisplayAtCheckIn = 1`.

**Report Shows:** - Counter Party No (Alpha), Name - Country, Affiliated To

**Important:** This is NOT all counter parties in the system - only those flagged for display during document check-in.

**Use Cases:** - Reference list: Which suppliers appear in check-in dropdown - Configuration audit: Verify correct suppliers are enabled - Training: Show users available counter party options - **NOT** for vendor analysis or counting documents per supplier

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**Report Features (All Reports):** - **Preview Before Export:** See data grid with paging and sorting - **Column Metadata:** View data types and formats - **Excel Download:** One-click export with IKEA blue headers - **Real-time Data:** Reports query live database (no caching) - **No Filters:** Reports show all matching data (no user-applied filters)

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## □ □ ADMINISTRATION

### User Permissions (/edit-userpermissions)

**Purpose:** Manage user access to counter parties, countries, and document types.

**Key Features:** - **User Search:** Find users by account name (Active Directory) - **Add New User:** Register users who aren't in system yet - **Permission Assignment:** - Counter Parties: Grant access to specific business entities - Countries: Restrict by geographic region - Document Types: Control access by document classification - **Registration Requests:** Filter to show users without permissions - **Bulk Actions:** Assign multiple permissions at once - **Active Directory Integration:** Auto-populate user details from domain

**Common Tasks:** - New employee: Add user → Assign counter parties - Role change: Edit user → Update document type permissions - Geographic restriction: Limit user to specific countries - Access review: Search user → View all permissions

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## Reference Data Administration

**Currency** (/currency-administration) - Add/edit/delete currency codes - Set currency name and symbol - Manage active currencies for document registration

**Country** (/country-administration) - Maintain country list for document classification - Edit country names and codes - Control available countries in dropdowns

**Document Type** (/documenttype-administration) - Define document categories (Contract, Invoice, etc.) - Configure field visibility rules (mandatory/optional/hidden) - Set document type descriptions - Control registration form behavior by type

**Counter Party** (/counterparty-administration) - Manage business entities (suppliers, customers, partners) - Edit counter party names and contact details - Maintain relationships between entities - Bulk import/export capabilities

**Document Names** (/manage-document-names) - Predefined document name templates - Link to specific document types - Speed up registration with name autocomplete - Maintain naming consistency

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## ☐ SETTINGS

### Configuration Management (/configuration-management)

**Purpose:** System-wide settings and application configuration.

**Key Features:** - View application settings - Edit configuration values (admin only) - Manage file paths (scanned folder, archive location) - Email notification settings - Audit trail retention policies - Performance tuning options

**Common Settings:** - Scanned files path (network folder location) - SMTP server for email notifications - Default barcode starting number - File size limits and allowed extensions - Active Directory group mappings

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## ☐ KEYBOARD SHORTCUTS

**Counter Party / Third Party Selectors:** - Arrow Down/Up: Navigate suggestions - Enter: Select highlighted item - Escape: Close dropdown - Tab: Close dropdown and move to next field

**Search Page:** - Ctrl+F: Focus search field (browser default) - Tab: Navigate through filters - Enter: Apply search (when in text field)

**Data Grids:** - Click column headers to sort - Use pagination controls at bottom - Search box filters current page results

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## ❑ TIPS & BEST PRACTICES

1. **Barcode Format:** Use consistent numbering (e.g., 5-6 digits)
  2. **Counter Party Search:** Type 2-3 letters for autocomplete suggestions
  3. **Document Type Selection:** Choose type first to see required fields
  4. **File Naming:** Include barcode in scanned filenames for auto-detection
  5. **Action Dates:** Set action dates for follow-up reminders
  6. **Excel Export:** Use for reporting, analysis, and archival
  7. **Clear Filters:** Use × buttons to reset search criteria
  8. **Mandatory Fields:** Red asterisk (\*) indicates required data
  9. **Audit Trail:** All changes are logged with username and timestamp
  10. **Real-time Updates:** Refresh icon indicates live data synchronization
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## ❑ COMMON WORKFLOWS

**Daily Operations:** 1. Check Action Reminders (overdue + today) 2. Check-in overnight scanned files 3. Register new documents received 4. Update action dates on completed tasks

**Weekly Tasks:** 1. Review “This Week” action reminders 2. Run Unlinked Registrations report 3. Export document lists for team review 4. Check barcode gaps for number management

**Monthly Tasks:** 1. Run Duplicate Documents report (cleanup) 2. Export Suppliers report (business analysis) 3. Review user permissions (access control) 4. Archive completed documents

**Ad-hoc Searches:** 1. Search by counter party (vendor inquiries) 2. Search by date range (period reports) 3. PDF content search (find specific clauses) 4. Barcode lookup (quick document access)

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## ❑ BROWSER COMPATIBILITY

- **Chrome/Edge:** Full support (recommended)
  - **Firefox:** Full support
  - **Safari:** Full support (macOS/iOS)
  - **Mobile:** Responsive design, touch-friendly
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## ❑ SECURITY NOTES

- **Windows Authentication:** Login with domain credentials
  - **Role-Based Access:** HasAccess policy required for all features
  - **Audit Trail:** All actions logged with user identity
  - **File Validation:** Only allowed file types accepted (.pdf, .jpg, .png, .doc, .xls)
  - **Path Security:** Automatic validation prevents unauthorized file access
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**Version:** 3.0 **Last Updated:** January 2025 **Application:** IkeaDocuScan V3 - Blazor WebAssembly + Server

For technical support or feature requests, contact your system administrator.