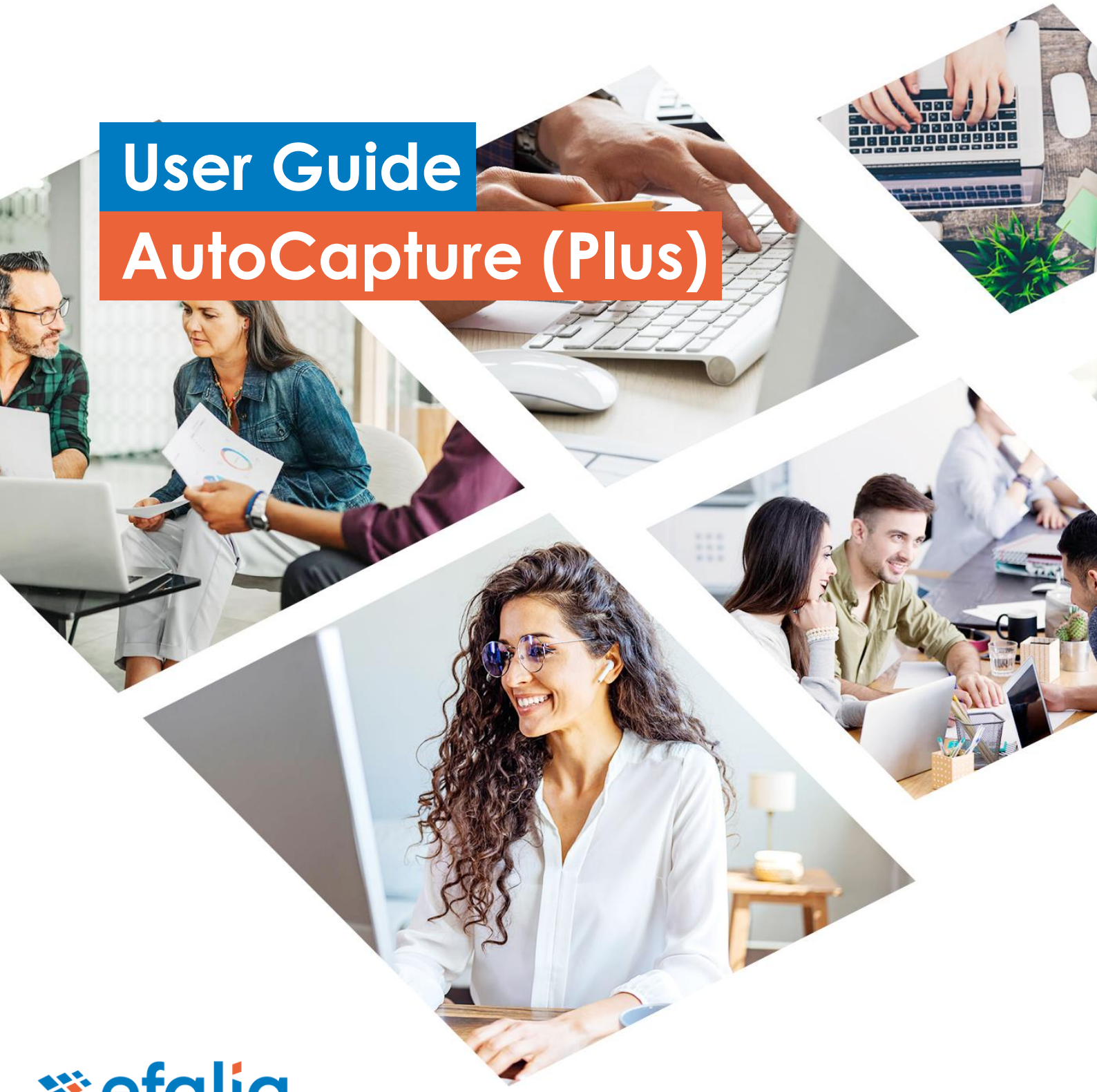
efalia ecm

Version 4.1

User Guide
AutoCapture (Plus)



efalia
smart content suite on a human scale

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Welcome to Efalia ECM

The Efalia ECM AutoCapture (Plus) Client is the learning tool to train new invoices and credit notes. Using the AutoCapture (Plus) Client, previously scanned or imported supplier documents are defined for the usage with Efalia ECM AutoCapture (Plus).

How Documents are Stored

Efalia ECM stores documents in Cabinets. There may be several Cabinets created in an organisation; a user is only allowed to work with those Cabinets to which they have been granted access.

Each Cabinet can contain several document types and Index fields are assigned to the document types, which can then be completed according to the filing requirements of the documents. The retrieval information is entered into the index field. Documents are stored with this index data for easy retrieval.

Although a user may have access to a Cabinet, they are only able to work with those document types in a Cabinet to which they have been granted access. Additionally different rights can be granted per document type, a user may for example store documents in one document type but is only allowed to retrieve and display in a second document type.

Documents scanned in black and white are stored as TIFF; coloured documents are stored as compressed JPEG files.

Electronic documents, PDFs, (EDOCS) are stored in original format and can be viewed by an inbuilt viewer even if the associated application is not installed.

Installation and Basics

General Information

Efalia ECM AutoCapture Client application is a Windows application and is installed on client workstations. This can be done manually or by independent software rollout.

Note

During installation you need be logged-in with administrative rights.

User Licences

Users are assigned to one of the following Efalia ECM groups; ***fd-admins***, ***fd-scan***, ***fd-scan-named***, ***fd-user-named***, ***fd-user*** and ***fd-web***.

Only as many users can connect to the Efalia ECM Server and logon as licences are available. After 30 minutes of idle time (this is a default value and can be changed), the AutoCapture Client will automatically log off and free the licence for another user. It is possible to specify more users in the Efalia ECM groups than licences available. Therefore it is possible, that a user cannot connect to the system because all licences are used. Logon will then only be possible once another user has logged off.

The groups ***fd-scan-named*** and ***fd-user-named*** should only contain as many users as named licences are available. The users specified here will always have access to the system; e.g. to scan, index and check in and search for and retrieve documents.

Accounts assigned to the group ***fd-web*** have no access to the AutoCapture Client.

Prerequisites

.NET Framework

Microsoft .NET Framework 4.x must be installed before the Efalia ECM applications can be installed.

Visual C++ Redistributable Installation

Before the installation of Efalia ECM, all Visual C++ redistributables, provided in the folder ***Redist***, must be installed on all computers, Efalia ECM is being installed on.

Efalia ECM Component Service (recommended)

Efalia ECM Component Service is needed to enable the AutoCapture (Plus) Client to display documents in PDF format.

If the Efalia ECM Component Service is not installed, the AutoCapture (Plus) Client can only display documents saved in Tiff or JPEG format.

Connection to the Server

When starting the AutoCapture Client, the Efalia ECM server's address may have to be entered to allow the client to connect to the server. Please check with the Efalia ECM administrator for the connection information.

More information on the settings can be found in the Options Settings chapter.

Online Mode only

The Efalia ECM AutoCapture Client can only be used with an active connection to the Efalia ECM Server.

AutoCapture Client Cache

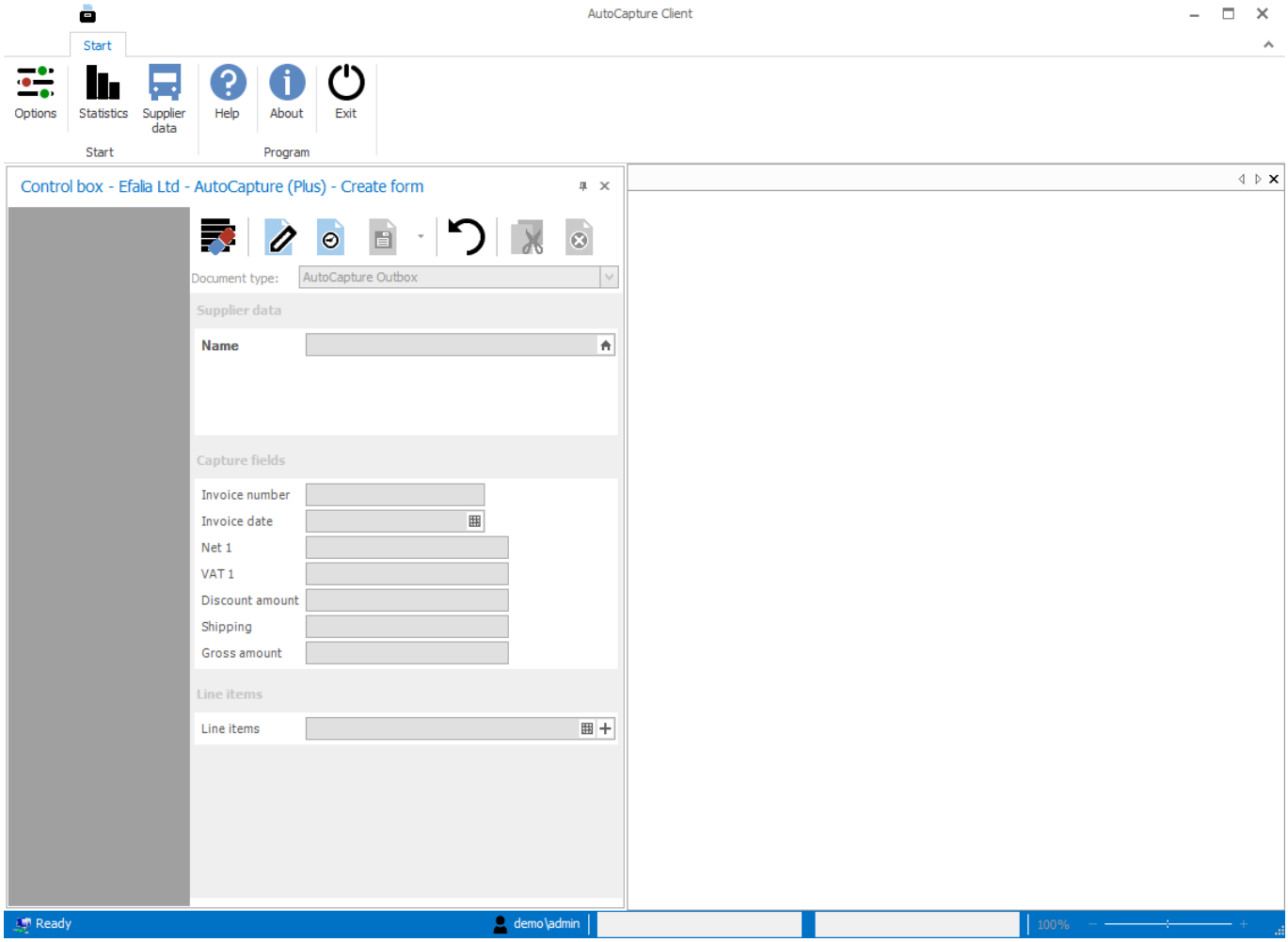
For each AutoCapture user a separate cache is created on the workstation where copies of the documents during the creation or editing of forms are stored

Normally the cache is located in a ***FileDirector AutoCapture*** folder within ***My Documents***.

The location is, by default, determined by Windows settings. This can be overridden by a server profile, which can be configured by an Efalia ECM administrator, and is described in the Efalia ECM Installation Guide.

The AutoCapture Desktop

When opened, the AutoCapture commands and options are available from the displayed toolbars. Once a Cabinet is opened, the ***Navigation bar*** and a ***Control Panel*** is displayed



Control Panel

When an Efalia ECM Cabinet, that has been set up for Efalia ECM AutoCapture, is opened, the ***Control Panel*** is displayed. This gives the user access to the tools needed for the training of supplier data and document characteristics for Efalia ECM AutoCapture.

Document Display Window

The document display window shows the corresponding document

To adjust the display, the toolbar below the document viewer offers the following options:

Icon	Function	Icon	Function
	First document		Last page
	Previous document		Fit all
	Next document		Fit width
	Last document		Original size
	First page		Zoom in
	Previous page		Zoom out
	Next page		

First Steps

Open a Cabinet

A Cabinet can be opened manually or automatically when the AutoCapture Client is started. Cabinet settings are downloaded to the local cache when it is opened.

Open Cabinet Manually

Selecting  ⇨  ***Cabinet*** will display a list of available Cabinets. Double-click the Cabinet name, or select it and press the ***OK*** button to open the Cabinet.

Open Cabinet Automatically

A Cabinet can be opened automatically when the option Open last used Cabinet is selected within the AutoCapture Client ***Options***. The Cabinet that was in use when the AutoCapture Client was last closed will be automatically opened.

Queues

When an AutoCapture cabinet was selected, the AutoCapture Client user interface shows the desktop.

Now, documents, processed by AutoCapture, can be requested from the queues.

Documents from the queues ***Unknown documents*** or ***Documents on hold*** can be requested by pressing the corresponding button in the ***control box***.

Documents from the queue ***Postindex documents*** can be requested within the ***Statistic*** window.

Unknown documents

The queue ***Unknown documents*** contains new documents, which have been processed by the AutoCapture routine but not recognised.

One reason for it could be a new supplier.

Documents on hold

The queue ***Documents on hold*** contains documents, which had been ***Set on hold*** by an Efalia ECM AutoCapture user before.

See also: Set on hold.

Postindex documents

The queue ***Postindex documents*** contains documents, which the AutoCapture routine has been able to recognise a supplier and a matching form, but the index values are not valid.

See also: Invalid field content

In addition, this queue also contains documents, which have been processed by the ***Smart Recognition***.

For more information see also: Automatic/Smart Recognition

Toolbars

Most AutoCapture actions can be selected using the tools available on toolbars.

Ribbon Toolbar

The ribbon toolbar can be opened and hidden through the icons ⌄ and ⌃, positioned on the upper right side the desktop. Opened, the icons listed below are available:

Tab Start

Icon	Function	Icon	Function
	Options		Help
	AutoCapture statistics		About
	Supplier data		Exit AutoCapture Client

Options

The settings in Options are user-specific. They are stored in the local cache of the Efalia ECM user account.

These user-specific settings allow customising the AutoCapture Client to the user's needs. The desktop theme is also customisable.

Statistics

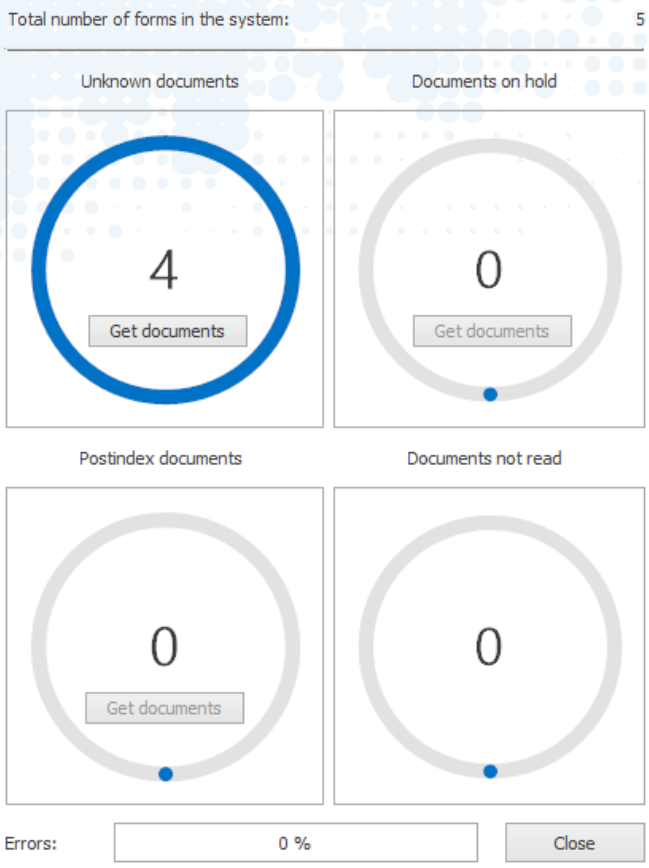
The statistics are shown in a pop-up window and provide an overview of documents processed by Efalia ECM AutoCapture.

Within the pop-up window, documents from the respective queues can be displayed through the button ***Get Document*** of the queue.

In addition, the pop-up window ***Statistics*** shows the ***Total number of forms in the system***.

The ***Total number of forms in the system*** is relevant for the ***Self-learning recognition***. The basis for this, is a minimum of 10 forms in the system.

See also: Self-learning recognition



Supplier data

The button ***Supplier data*** opens a pop-up window that contains the existing supplier master data. Supplier data can either be provided administratively by an ODBC source or added manually through the Efalia ECM AutoCapture training.

When the supplier data is provided from an ODBC source, the content is only listed but cannot be changed.

When the supplier data is stored in the respective cabinet and created through the Efalia ECM AutoCapture training, it is possible to add, change and, if necessary, delete data within this window.

Note

When entering a supplier name in the control box, a list of existing supplier addresses is shown.

This provides a quick access.

Help



The Help button opens this manual.

About



This will display the version number of the AutoCapture Client and information about the AutoCapture (Plus) licence. Also displayed is the version information for the following, if currently installed on the workstation:

- OfficeLink
- Component Service
- EDOC engine
- OCR engine

Exit



This button closes the Efalia ECM AutoCapture Client.

Create forms

Basics

The training in Efalia ECM AutoCapture is mouse-based.

When a pending document is received from the server, the thumbnails of this document are shown on the left-hand side of the control box and the selected page of the respective document on the right-hand side of the control box.

Firstly, the top field of the form fields should be selected. This is done by a mouse click into the field.

Now, when the mouse pointer is moved over the displayed page of the respective document, permitted field values are highlighted yellow, automatically.

The marked area can be extended by pressing CTRL on keyboard.

The right mouse button opens a context menu, which shows found anchor texts or the option fixed position. When a highlighted value is selected and filled into the field by a left-mouse-button-click, Efalia ECM AutoCapture selects the best anchor text, automatically.

An anchor text is used to calculate the distance between this text and the value.

Note

The option fixed position uses the coordinates of the selected value and links this coordinates with the value for this field.

This might cause problems in combination with scanner skew.

When an index value is not highlighted completely, a zone can be drawn by using the left mouse button. In this case, the anchor text is always defined automatically by the server.

Note

The zone must not be too small. A minimum size of 16x16px is needed for OCR.

ODBC Source

When in Efalia ECM EnterpriseManager, the use of an ODBC source is set-up for supplier data, all fields of the section supplier fields of the control box, except the field ***Name***, are locked.

The field ***Name*** allows a smart search over the existing supplier data. The smart search is started, when a minimum of three consecutive characters are entered into the field ***Name***, the list of suppliers is accordingly limited. An entry is selected with a ***mouse click*** or by pressing the key ***Return***.

Queues and Statistics

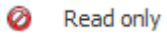
Unknown documents

This queue contains all new documents, where no corresponding supplier is found in the Efalia ECM AutoCapture supplier database and which were not processed by the self-learning AutoCapture routines.

The self-learning AutoCapture routines require a minimum of 10 forms in the system. The more forms are in the system, the better the self-learning AutoCapture routines become.

Operation of multiple Clients

When a user has requested a document from a queue, the document is locked for other users of Efalia ECM AutoCapture Client.



Note for Administrators

Documents that are currently processed by another user, are shown on the hitlist of Efalia ECM WinClient in status **Read only**.

Pending Documents vs. Available Documents

When a user receives the message ***No documents available***, although the statistic shows pending documents, means that these documents are currently processed by other users.

When a user receives the message ***No more pending documents available,*** all pending documents are processed.

Undo and Operation of multiple Clients

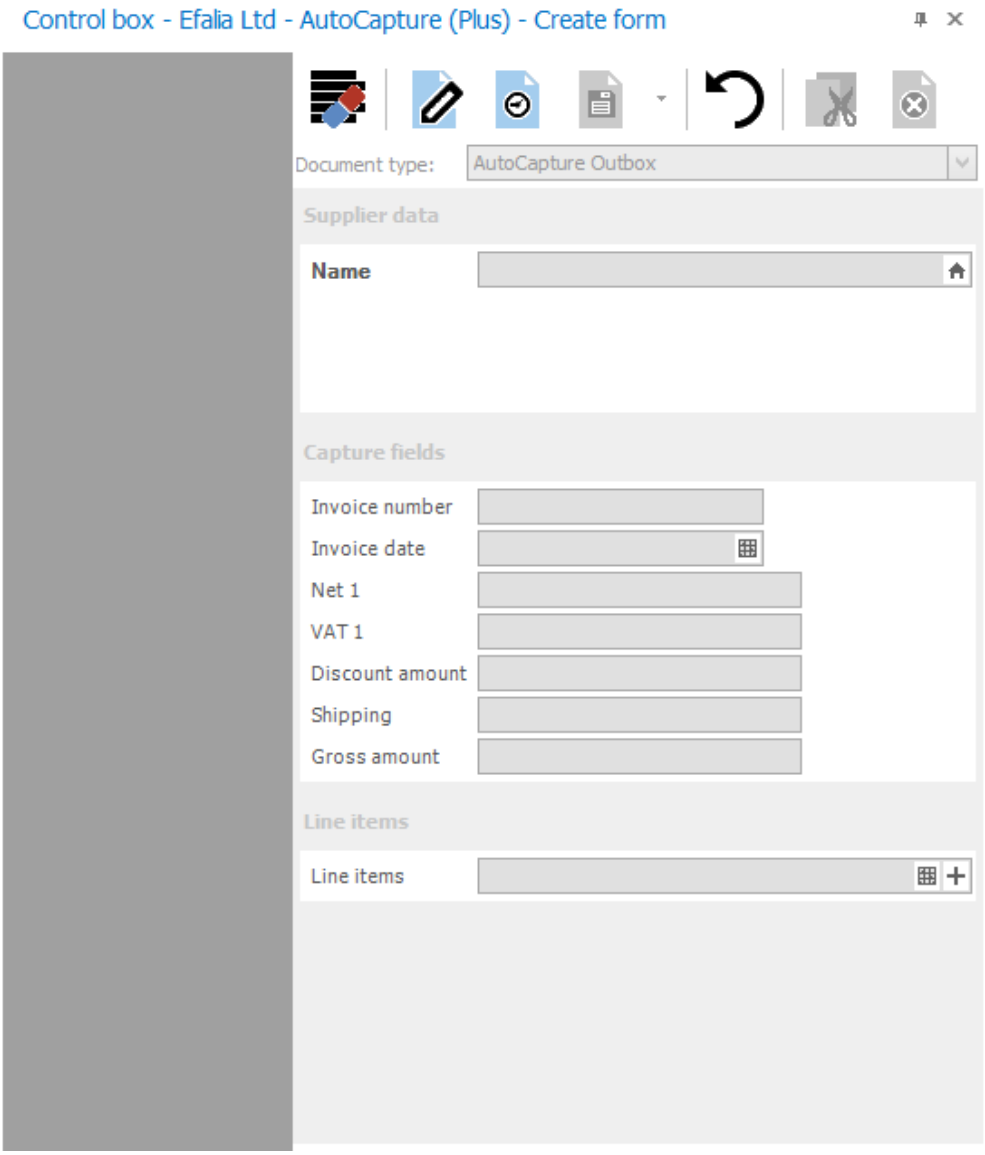
When a user aborts the process of a document in Efalia ECM AutoCapture Client, using ***Undo***, the fields of the control box and the viewer are cleared and the document is locked until the appropriate AutoCapture Client is closed.

Get pending document after using ***Undo***, provides the next available document from the queue.

If no more pending documents are available, the deferred document will be provided.

Control box

Documents in queues are requested through either the ***Control Box*** or the ***Statistics*** window.



Icon	Function
	Clear fields
	Get pending document
	Get document on hold
	Complete capture
	Reprocess document
	Set on hold
	Save document
	Undo
	Split document
	Delete document

Document types

The drop-down list contains only AutoCapture target document types, that have been set up in Efalia ECM EnterpriseManager as ***Use for AutoCapture Process documents***.

A trained and successfully processed document is automatically stored in its respective target document type.

Note

An Efalia ECM cabinet can contain other document types, that are not configured for Efalia ECM AutoCapture (Plus). These document types are not listed.

If a processed document is finally to be stored into a non Efalia ECM AutoCapture document type, it must be transfered either manually in Efalia ECM WinClient or WebServer or automatically through Efalia ECM BusinessProcessManagement.

Clear fields

This function clears all index information and additionally anchor and formatting information.

Get pending documents

This function sends a request to the Efalia ECM Server and a document from the queue ***Unknown documents*** is provided. Efalia ECM OCR has already read documents in this queue, and the full text has been stored, but either supplier data or a classification to a form for this type of document is missing. If applicable, the supplier data fields are filled.

Get document on hold

This function sends a request to the Efalia ECM Server and a document from the queue ***Documents on hold*** is provided. Documents in this queue have been ***Set on hold*** by a user.

If applicable, the supplier data fields are filled.

Complete capture

This function must be used when all relevant information has been added. This information is now sent to the Efalia ECM Server and stored.

This recently stored information is now used on all Pending documents to process further documents automatically.

A progress icon is displayed.

After the first document of the queue ***Documents on hold*** has been completely captured, the server automatically provides the next document and it is displayed in the AutoCapture Client.

Reprocess documents

This function sends all given information to the Efalia ECM Server, where it is stored only temporarily. The current document is reprocessed with the temporarily stored information. The result is shown in the Efalia ECM AutoCapture Client. This allows the user to check and adjust the settings of the current form before it is finally stored through ***Complete capture***.

Set on hold

This function sends the currently displayed document to the queue ***Documents on hold***.

Note

The number of documents in a queue can be checked through the option **Statistics**.

Undo

This function resets all previously made changes, trainings and the desktop of the Efalia ECM AutoCapture Client to its starting settings.

Note

All unsaved changes of the current document are lost.

Split document

This function splits the displayed, multi-page document.

Delete document

Through this button, either single pages of a displayed document can be deleted or the complete displayed document can be removed from the queue and is marked as deleted in the database.

When only selected pages are to be deleted, these pages are marked through checkboxes on the lower right side of the corresponding thumbnail.

When all pages of a displayed document are marked, the complete document is removed from the queues and marked as deleted in the database.

Marked for deletion:



Not marked for deletion:



Note

If a document has been deleted in the AutoCapture Client, a flag is set in the database, marking the document as deleted. Using **Info Search** in Efalia ECM WinClient, a deleted document can be, through right-click **Undelete Document**, shown and displayed again.

Form fields

The form fields are predefined Efalia ECM AutoCapture fields.

Form fields displayed in bold show that the information of this field is used for matching.

Note

An administrator of Efalia ECM Enterprise Manager can set aliases and hide fields.

ID

This field used for an internal ID and only used for ODBC sources.

The field is set to ***Read only***.

Name/Supplier

The corresponding field shows the name of a supplier. The icon  at the end folds the complete supplier's data out. These can now be edited.

Depending whether the supplier's information corresponding to the displayed document exist, the form training starts with folded or fold out fields.

When no supplier's information exists for the displayed document, all supplier fields are displayed. This helps a user creating new forms by simply using a mouse.



New Contact links the form to a new supplier.



Pin fields displays the complete list of form fields,

Note

Supplier information cannot be changed when an ODBC source is used for supplier data.

Address1/Address2/ZIP code/City/State/Country

These fields contain the address data of the respective supplier.

Telephone

This field contains the telephone number of the respective supplier.

E-Mail-Address

This field contains the e-mail address of the respective supplier.

Fax

This field contains the fax number of the respective supplier.

WebSite

This field contains the homepage URL of the respective supplier.

VAT ID Number

This field contains the VAT ID number of the respective supplier.

VAT Number

This field contains the VAT number of the respective supplier.

Bank name/Bank number/Account number

These fields contain the bank account information of the respective supplier.

Category

The content of the field is used to identify a form.

Typical contents are invoice, credit note, etc.

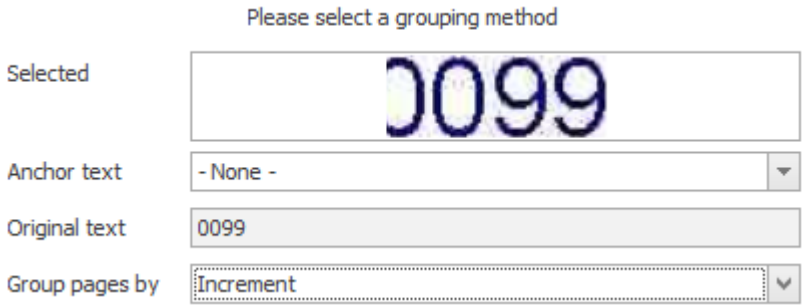
This field is not mandatory.

Note

When the field does not contain a value, the form is the last one in allocation, if there are multiple forms for a supplier.

Group pages by

The field ***Group pages by*** in Efalia ECM AutoCapture Client is optional. It can be set within the Efalia ECM EnterpriseManager by a trained administrator.



Drop-down Menu Anchor text

Type	Description
None	No anchor text is used. Efalia ECM AutoCapture expects the value at a fixed position.
Value	All other options in the list are text elements of the current document AutoCapture can use as ***Anchor text***. AutoCapture searches for possible anchor elements in front of the value or above.
None	No grouping active

Type	Description
Increment	For this setting, a page number should be selected. Now, the AutoCapture routine groups documents by an incrementing page number. As soon as a lower value than the one before is read, the AutoCapture routine creates a new document.
Empty on next page	For this setting, a value, that does only exist on the first page, should be selected. The AutoCapture routine groups all following pages where no value is read in this area to a document. As soon as a value is read, a new document is created.
Not empty on next page	For this setting, a value is selected that does exist on the following, related pages. As soon as this area is empty on one of the following pages, a new document is created.
Same on next page	For this setting, a value is selected, that is identically on the following, related pages. As soon as a different value in this area is read, a new document is created.
Not equal on next page	For this setting, a value is selected, that is not identically on the following, related pages. As soon as this value is read in this area again, a new document is created.
Identifies last page	A value, selected in combination with this option, must only occur one the last page of a document.

Currency

The field Currency contains a keyword list. This is an internal Efalia ECM keyword list and does not appear in Efalia ECM EnterpriseManager and cannot be edited.

The proposed currency in the keyword list is linked to installed Windows operating system.

In addition, a currency symbol in the amount fields is displayed, when the option Show currency symbol is selected. The currency symbol is linked to the language set in the AutoCapture Client.

The dependencies are listed below:

Language	Currency
German, French, Spanish, Portuguese	Euro

Language	Currency
English (UK)	Great Britain Pound
English (US)	US Dollar
Japanese	Japanese Yen (JPY)
Chinese (trad.)	Honkong Dollar
Chinese (simple)	Renminbi Yuan

A key within the app.xml of Efalia ECM AutoCapture Client allows to define the default value of the keyword list. The key does not change the dependencies of amount fields and language settings.

The default can be changed within the app.xml of Efalia ECM AutoCapture Client by a trained Efalia ECM administrator.

Example

<add key =“DefaultCurrency“ value =“GBP“ />

The following values can be set:

Shortcut	Currency
AUD	Australian Dollar
EUR	Euro
GBP	Great Britain Pound
JPY	Japanese Yen
NZD	New Zealand Dollar
USD	US Dollar
ZAR	South African Rand

Capture fields

The composition of capture fields is not defined by Efalia ECM AutoCapture.

Possible capture fields are:

Name	Description
Invoice number	The composition of an invoice number is not preset.
Invoice date	When selecting a date, Efalia ECM AutoCapture recognises the format. The recognised format can be checked and changed within a pop-up window. The settings of the date field are dependent on the language settings.
Order number	The composition of an order number is not preset.
Order date	When selecting a date, Efalia ECM AutoCapture recognises the format. The recognised format can be checked and changed within a pop-up window. The settings of the date field are dependent on the language settings.
Net amount	AutoCapture allows up to two net amount fields.
Tax	AutoCapture allows to set-up up to two tax amount fields.
Advance payment	Amount field
Discount	Amount field
Gross	Amount field

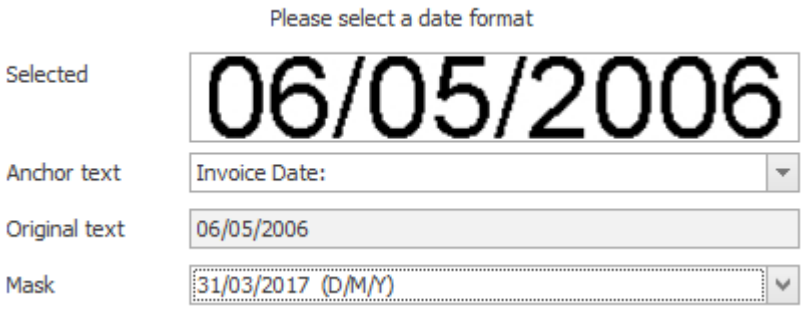
Capture Date formats

Efalia ECM AutoCapture is designed to identify a date format, automatically.

The date format, displayed in the field, is linked to the language set in the AutoCapture Client.:

Language	Format
English (UK), French, Spanish, Portuguese	dd/MM/yyyy
German	dd.MM.yyyy
English (US)	MM/dd/yyyy
Chinesisch (trad.), Chinesisch (einfach), Japanisch	yyyy/MM/dd

When a date could not be clearly identified, an additional window pops up, to specify the date format more detailed.



Drop-down Menu Anchor text

Type	Description
None	No anchor text is used. Efalia ECM AutoCapture expects the value at a fixed position.
Value	All other options in the list are text elements of the current document AutoCapture can use as ***Anchor text***. AutoCapture searches for possible anchor elements in front of the date or above.

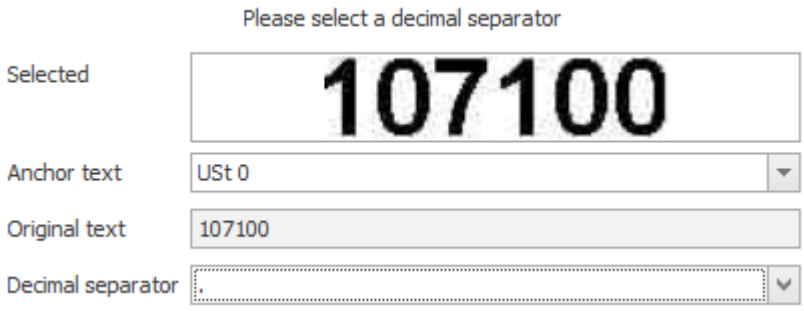
Drop-down Menu Mask

The drop-down menu lists different date formats for selection.

Capture amounts

Efalia ECM AutoCapture is designed to identify an amount and the corresponding decimal separator format, automatically.

When a decimal separator could not be clearly identified, an additional window pops up, to specify the decimal separator format more detailed.



Drop-down Menu Anchor text

Type	Description
None	No anchor text is used. Efalia ECM AutoCapture expects the value at a fixed position.
Value	All other options in the list are text elements of the current document AutoCapture can use as ***Anchor text***. AutoCapture searches for possible anchor elements in front of the date or above.

Drop-down Menu Decimal separator

Type	Description
None	No decimal separator is used. The captured value is taken as an amount with two digits after the decimal separator. Example: 107100 is converted to 1,071.00
Selectable values: . , / -	All other options in the list are possible decimal separators, which can be defined for this position of the form.

Tooltip

A tooltip can be displayed for each of the Efalia ECM AutoCapture ***Capture fields***, after a corresponding value was filled into the field.

The tooltip shows the selected anchor of the value. It appears when the mouse pointer is moved over the field label.

Note

A tooltip is not displayed, if the field type is contact field or amount. Also, a tooltip is not displayed, if the field is not linked to a zone or the captured value has a fixed position.

Index field colours

Colour	Description
White	Marks a neutral status. No information about valid or invalid content is available.
Green	The field content is valid.
Red	The field content is invalid.

Used when: Set-up a form

The Efalia ECM AutoCapture Client checks in the background, whether the field content matches with the OCR information. A deviation of 1 is accepted.

Used when: Editing indexes

When number values are indexed, Efalia ECM AutoCapture checks in the background whether the values are valid. This includes calculations as ***Net1 +Tax1 = Total amount.***

Note

Discount values are part of this calculation.

Valid field content

The colour green is used for both cases, described above.

Invalid Field content

The colour red is used for both cases, described above.

This means, that a red marked field shows that there is either a deviation larger than 1 or the result of the offset is faulty.

Note

Discount values are part of this calculation.

Set highlight colours

The colours for highlighting values and anchor texts can be set in the app.xml of the AutoCapture client.

In default, the captured value that is filled into an index field is highlighted in yellow and the respective anchor text green.

Amounts

Efalia ECM AutoCapture identifies decimal separators automatically. In case, a separator cannot be identified, it can be selected manually through a context menu. Within this context menu, a decimal separator e.g., decimal point, full stop or dash.

The option None can be used for values, that can be formatted into a valid amount value.

AutoCapture formats the value into an amount with 2 decimal digits.

Example

000021785 is formatted to ***217,85***.

Terms and conditions

Not all pages of a document, e.g., an invoice, can be used for setting up a form. Rank among these are terms and conditions. The thumbnails of these pages are locked and cannot be selected for the definition of a form.

Line items



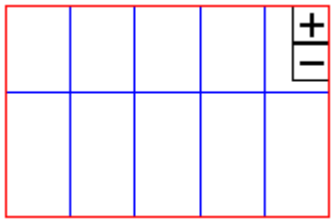
Efalia ECM AutoCapture Plus includes the processing of line items.

Icon	Description
⊞	Opens a preview window, containing the line items of the displayed invoice.

Icon	Description
+	Adds the grid to the upper left corner of the active document page. ***Important*** Using an Efalia ECM Plus licence, a grid must always be added, even on invoices without line items or if the line items shouldn't be captured. In these cases, it needs only to be added with a mapping with the empty value from the drop-down list.

The grid

After adding the grid for line items, it is added to the upper left corner of the active document page.

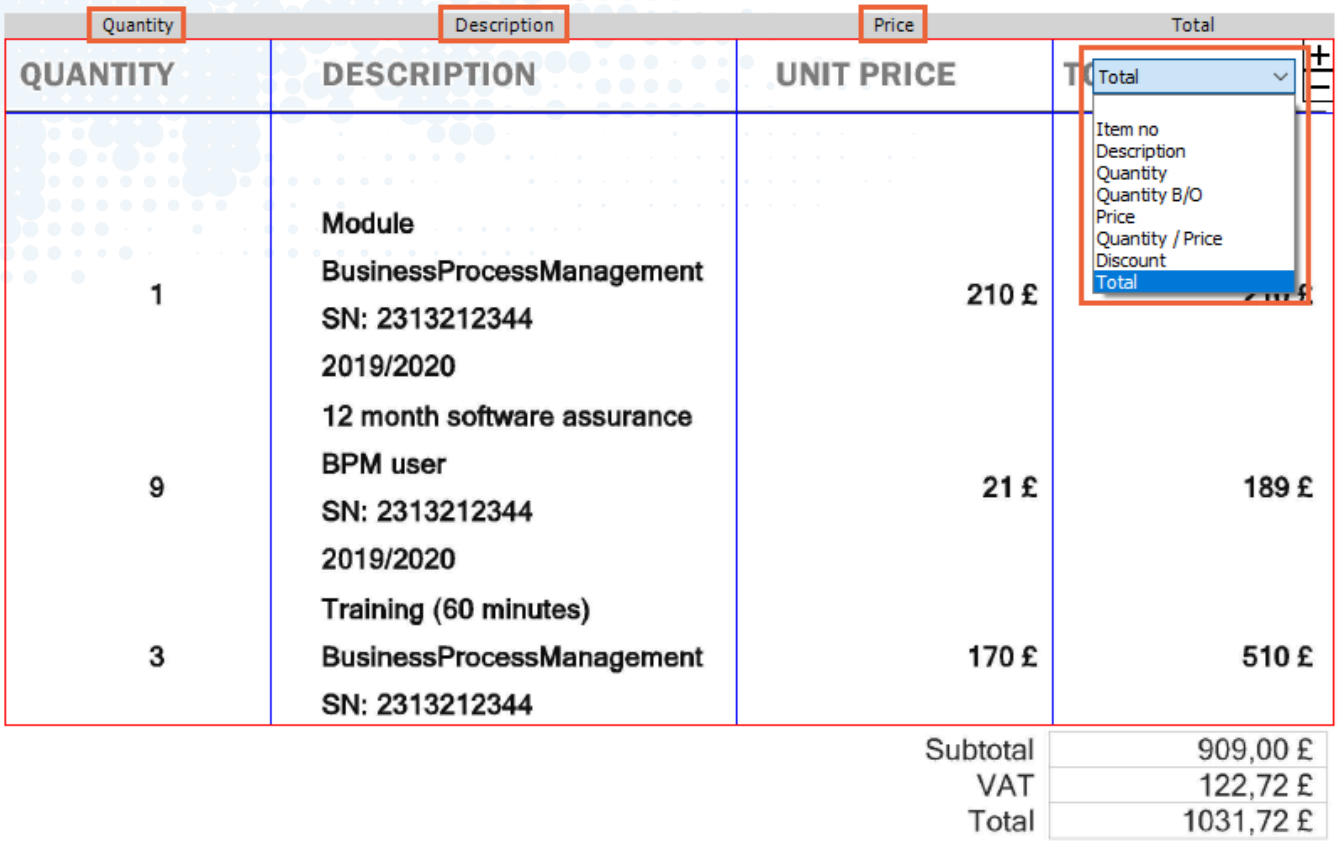


Icon	Description
+	Adds another column to the existing grid.
−	Deletes the last column from the existing grid.

The grid must be positioned over the area containing the line items via drag&drop. After this, the mapping can be done easily, using the drop-down menus from the first row of the grid.

The selected mapping should correspond with the columns of the invoice.

The mapping and grabbed information is used for the created PDF displayed on the page, added to the document and in digital format stored within the PDF file.

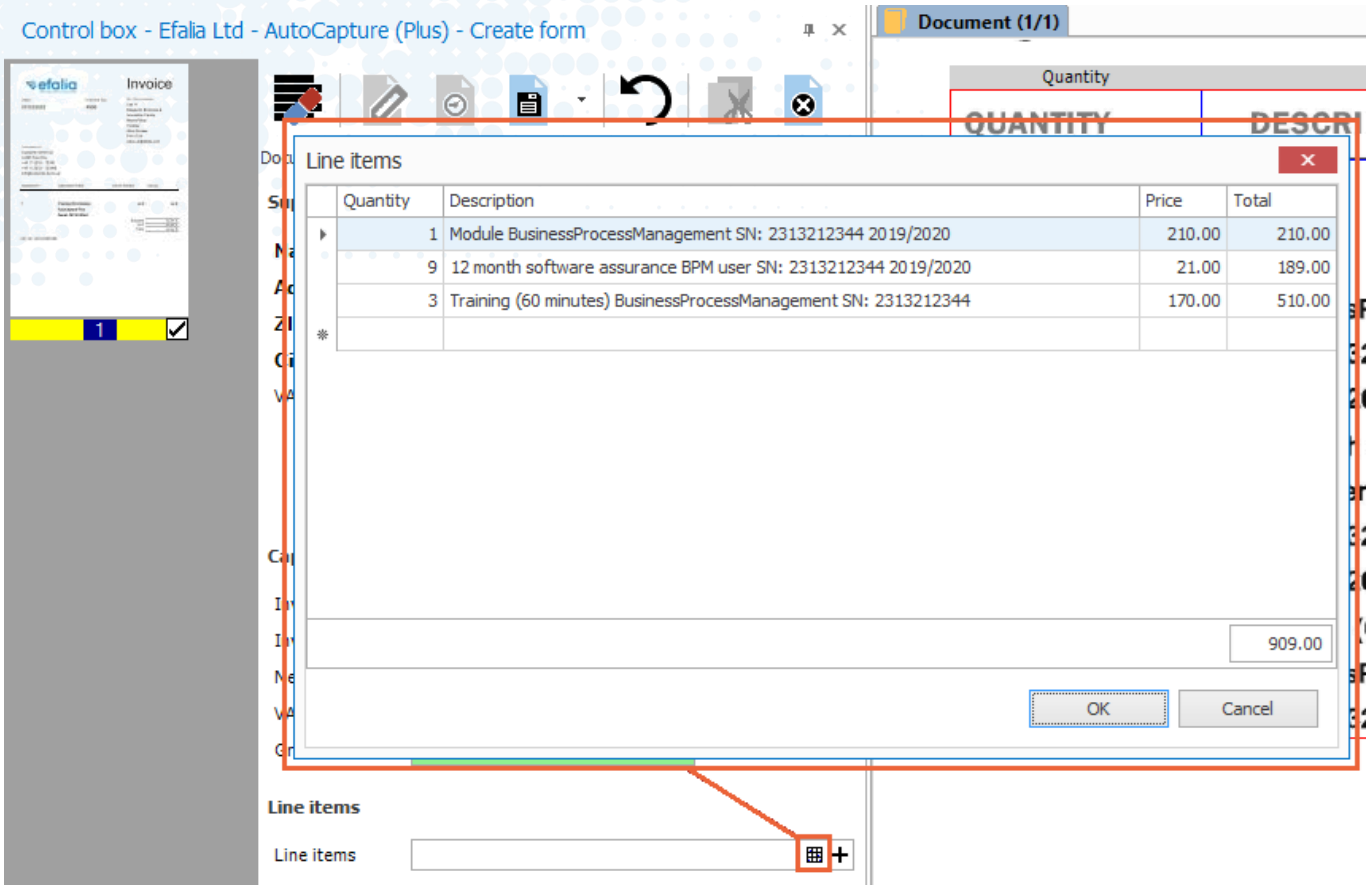


Mapping options

- Item no
- Description
- Quantity
- Quantity B/O
- Price
- Quantity/Price
- Discount
- Total

Line items Preview

After the grid for line items was placed and mapped, a preview allows you to check the result and – if needed – to alter it for the displayed invoice.

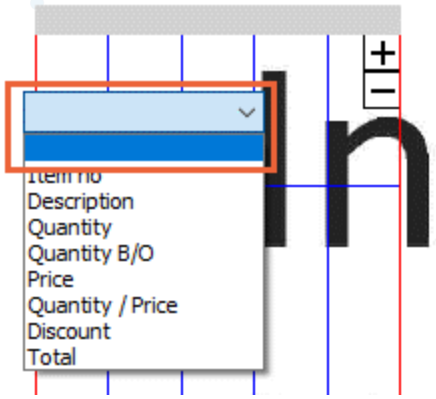


Mixed Invoices (with and without line items)

Using an Efalia ECM Plus licence, a grid must always be added, even on invoices without line items.

In these cases, it needs only to be added with a mapping with the empty value from the drop-down list.

Example



Documents on hold

The queue Documents on hold, contains new documents, which were set on hold by a user, using the option Set on hold.

The option Set on hold is not available, when the mode of the control box is Pending documents.

Postindex documents

The queue ***Postindex documents***, which can be accessed through the statistics window, can contain both; documents from unknown suppliers and documents from known suppliers

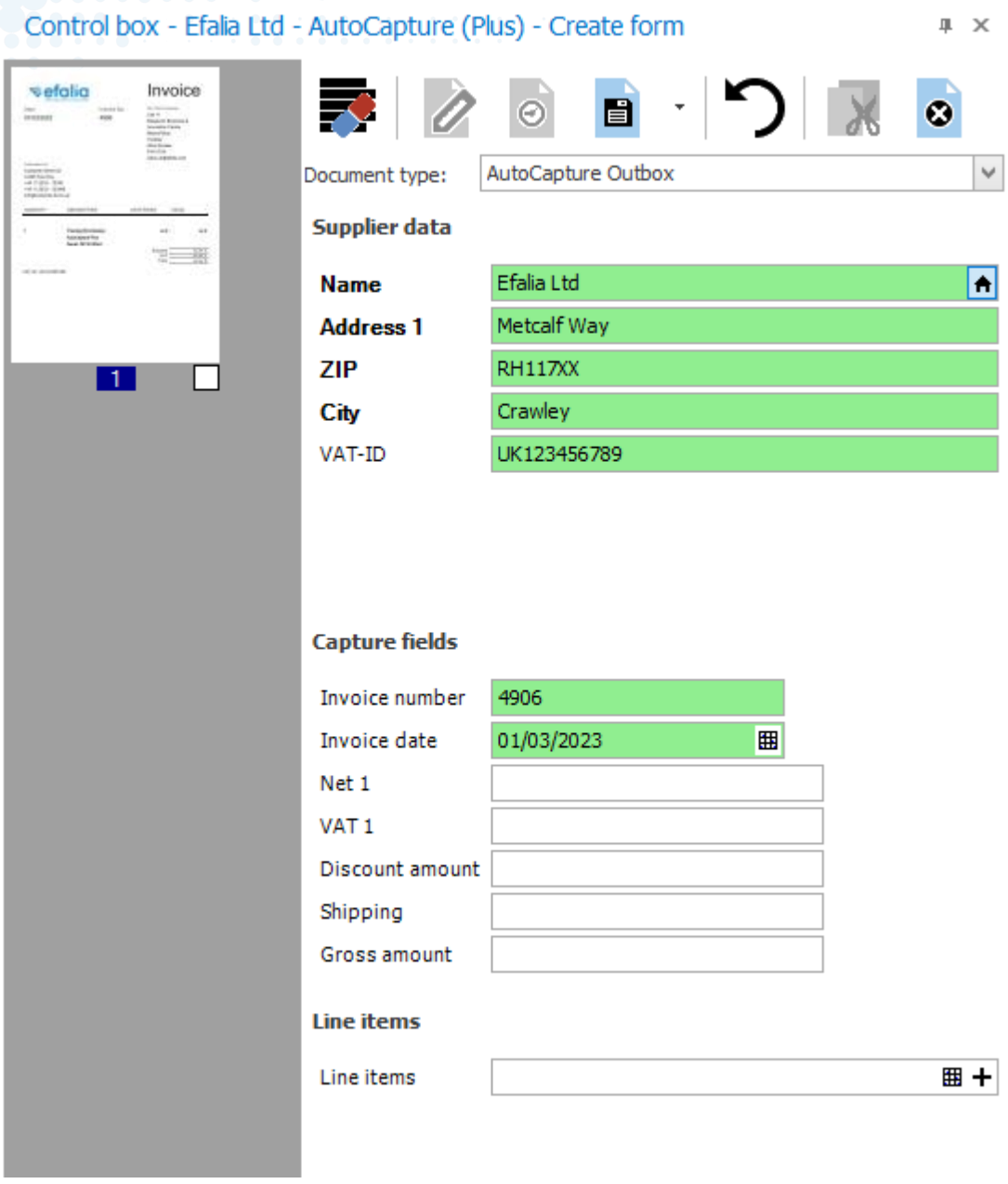
Documents of known suppliers are put into this queue, in case the supplier' s layout changed or values could not be read.

This queue can also contain documents as a result of the self-learning routines of Efalia ECM AutoCapture.

The statistics window can be selected through the button Statistic in the ribbon tool bar of the Efalia ECM AutoCapture client.

Control box

Documents in queues are requested through the ***Statistics*** window.



Icon	Function
	Clear fields
	Get pending document
	Save index changes

Icon	Function
	Save form and index changes
	Undo
	Split document
	Delete document

Document types

The drop-down list contains only AutoCapture target document types, that have been set up in Efalia ECM Enterprise Manager as ***Use for AutoCapture Process documents***.

A trained and successfully processed document is automatically stored in its respective target document type.

Note

A Efalia ECM cabinet can contain other document types, that are not configured for Efalia ECM AutoCapture. These document types are not listed.

If a processed document is finally to be stored into a non Efalia ECM AutoCapture document type, it must be transfered either manually in Efalia ECM WinClient or WebServer or automatically through Efalia ECM BusinessProcessManagement.

Clear fields

This function clears all index information and additionally anchor and formatting information.

Save index changes

This function saves all index changes made and sends the data to the server. Only the index changes are saved, without changes on the existing form.

After this, the server checks for pending documents in the queue ***Postindex documents*** and provides the next pending documents to the user.

If exist, the supplier fields are filled with the corresponding data.

Save index and form changes

This function saves all index and form changes made to the server. Both information is stored.

Self-learning recognition

If the document was sent to the queue by the self-learning recognition routines, the index data is saved and a new form is created and stored.

Existing form

If the document belongs to an existing supplier, where supplier data and a form already exists, the function saves the index changes and edits the existing form.

Re-scanning the queue

After saving the changes, the server checks all exisiting documents in the queue with the added or edited forms whether the new information helps to process other documents in that queue.

A progress is shown.

If the queue does still contain pending documents, the next document waiting in the queue ***Postindex documents*** is displayed in the AutoCapture client.

Undo

This function resets all previously made changes, trainings and the desktop of the Efalia ECM AutoCapture Client to its starting settings.

Note

All unsaved changes of the current document are lost.

Split documents

This option allows a user to split the displayed document into multiple documents.

This option is only available, when the supplier is already stored in the Efalia ECM AutoCapture supplier database and either ***Group by*** is used or an invoice number exists.

Delete document

This function removes the displayed document from the queue and marks it as deleted in the database.

Note

If a document has been deleted in the AutoCapture Client, a flag is set in the database, marking the document as deleted. Using **Info Search** in Efalia ECM WinClient, a deleted document can be, through right-click **Undelete Document**, shown and displayed again.

Capture fields

For more information, see: Paragraph Capture fields in chapter Queues and Statistics

Edit forms out of the Efalia ECM WinClient



Due to changes in layout by suppliers, it might be necessary to edit existing forms.

The edit is initiated within the Efalia ECM WinClient.

The respective document is retrieved through the search functionality of Efalia ECM WinClient.

Note

This document must have been already processed by the Efalia ECM AutoCapture (Plus) routines.

This document must not be picked from the document type that is defined as AutoCapture inbox. Documents within this document type have not passed all Efalia ECM AutoCapture (Plus) routines yet.

When the document is displayed in WinClient, the editing is started through the ribbon bar icon ***Edit forms*** in tab ***Edit***. Now, the AutoCapture Client is launched and a drop-down menu lists all available suppliers.

After selecting a supplier, all forms of this supplier are listed in a drop-down menu, below.

When both is selected, the form can be edited.

Edit index out of the Efalia ECM WinClient



The option ***Edit index*** in tab ***Edit*** of the Efalia ECM WinClient's ribbon bar initiates the index editing function, after a search action in the document type that is defined as Efalia ECM AutoCapture inbox.

It must also be a document that is pending in the Efalia ECM AutoCapture queue postindex documents.

The AutoCapture (Plus) Client is loaded and the selected document is displayed.

Now, the editing can be done.

Changed and edited Zones are included in the ***smart recognition*** routine.

Note

The selected document must not have passed all the Efalia ECM AutoCapture routines and must be pending in the queue **Postindex documents**.

Note

If the document is not in the corresponding queue, the client does not display it in the viewer after opening it.

The classification of the document can be checked via the option **Statistic** in Efalia ECM AutoCapture (Plus) Client.

Remove Zones (Smart Recognition only)

If a zone is marked as invalid, it can be deleted from the existing form by pressing ***DEL*** on keyboard.

Self-learning Recognition

Efalia ECM AutoCapture can recognise values on new documents based on other forms, trained and saved previously. The smart routines of Efalia ECM AutoCapture use universal applicable information and definitions, built-up during the forms creation.

A successful smart recognition needs at least to find a supplier, an invoice date, an invoice number and a gross amount on the new supplier's document to transfer it into the Efalia ECM AutoCapture outbox document type.

At this point, Efalia ECM AutoCapture tries to recognise additional values e.g., ***net amounts***. These values are not mandatory and a document is transferred into the Efalia ECM AutoCapture outbox ***Processed documents***.

Requirements:

- A single-outbox-configuration
- A minimum of 10 supplier forms must have been created
- A successful recognition of a supplier

Document type: AutoCapture Outbox

When, in addition to a supplier, an invoice date, invoice number and the gross amount are valid, the document is transferred into the Efalia ECM document type, set-up as AutoCapture outbox.

Queue: Postindex documents

When, in addition to a supplier, an invoice date, invoice number or gross amount was found, the document is transferred into the AutoCapture queue ***Postindex documents***.

Documents with invalid gross amounts are also transferred into the queue ***Postindex documents***.

Note

The smart recognition re-checks all pending documents each time a new form has been created.

Queue: Unknown documents

When the AutoCapture routine wasn't able to get any of the three values, mentioned above, the document stays in the AutoCapture queue ***Unknown documents*** and a form must be created.

Document Display

About Documents

A document within Efalia ECM is either a one page or a multipage document. One page of a document can be either a scanned page or a PDF file

The AutoCapture Client has extensive display utilities. If installed alone it is able to display TIFF, JPEG and PDF files, the formats used to store black/white, greyscale and colour scanned documents.

Display Layouts

When a document is opened in the Display window, the default view shows the document thumbnails and the first page of the document.

Page Display Tools

The display of a document within the display window can be changed, for example by zoom and rotation. The display tools are available on the toolbars

Some or all of the display tools may not be available when displaying electronic documents.

Display whole page in the image display window



The whole of the displayed page will be shown in the document display window.

Fit width of page to the document display window



The document display window will fit the width of the document to the size of the display window.

Display page in original size



Selecting this will display the document at its maximum size zoom level. When displaying TIFF or JPEG files, each pixel of the image is displayed as one screen pixel.

Zoom in



This tool will increase the zoom factor, making the displayed document larger.

Zoom out



This tool will decrease the zoom factor, making the displayed document smaller.

Scanning Documents

The Efalia ECM AutoCapture Client does not provide a scan option.

Documents that are to be processed by Efalia ECM AutoCapture, must be either scanned beforehand within Efalia ECM WinClient or Efalia ECM WebServer or be imported by an Efalia ECM scheduler.

Options Settings

The AutoCapture Client can be configured to perform certain functions automatically, and you can configure how other functions are carried out. Settings can also be applied as to how the AutoCapture Client will look.

To change these settings, select ***Options*** from the ***Start*** toolbar. The various settings can then be configured within the tabs available.

General Settings

Skin

The Skin option allows you to select the general colour scheme used by the AutoCapture Client. There are several options available

Context menus

You can select whether the context menu's – those that are displayed when you right-click, use large or small tool icons.

Open last used Cabinet

When selected, the last used Cabinet is automatically opened when the AutoCapture Client is started.

Reset Zoom when displaying new page

With this option set, the current zoom factor is not kept when a new document is selected to be displayed the display switches to a new page.

This option can be useful when indexing documents with the same layout. In this instance, de-select the option.

Use area post-indexing

If this option is set, the zoom parameter is saved for each index field individually. This allows for fast and easy manual indexing. If the field contents are always located at the same position on the document, the zoomed part always moves to the correct location.

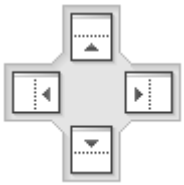
Image Enhancement

When set, this option turns on the AutoCapture Client image rendering, which enhances the display quality of images.

Allow floating control and list windows



Dynamic arrows showing possible positions appear during the positioning of the control bay via drag drop. This option can be set to provide this method of free positioning. When this option is disabled, control bay cannot be moved freely.



Focus skips over valid fields

Dynamic arrows showing possible positions appear during the positioning of control bays and lists via drag drop. This option can be set to provide this method.

Show currency symbol

This option shows a currency symbol in amount fields. The displayed symbol depends on the selected currency in the field Currency.

Note

The field **Currency** can be enabled/disabled in the Efalia ECM Enterprise Manager. This can be done in the AutoCapture settings.

When the field is disabled, the displayed currency symbol corresponds to the language of the installed Windows operating system or the settings within the app.xml of the Efalia ECM AutoCapture Client.

Language

The language used by the AutoCapture Client can be selected. By default, the language of the operating system (Windows) is used, but it can be changed to one of the following languages:

English (UK)	Espanol
English (US)	Japanese
Deutsch	Chinese (Big5)
Francais	Chinese (Simplified)
Portugues	

If you switch to a different language, select a language from the drop down list and click OK. The AutoCapture Client will have to be restarted.

Connection

The Connection tab determines which Efalia ECM servers the AutoCapture Client can connect to, and the basic login settings for each server. Multiple connections can be established to different servers, although a single connection to an Efalia ECM server is standard. Any connection setting changes will be applied to the AutoCapture Client when it is next started.

If the Connection window appears when starting the AutoCapture Client, ask your system administrator for the address of the Efalia ECM server and enter the URL of the server. Once the connection settings are entered they are stored in the local Cache of the AutoCapture Client.

Change Password

When using an account belonging to an Efalia ECM internal sub-domain, a user can change their password by clicking on the ***Change password*** icon on the ***Connection*** tab. The new password must be entered twice for verification.

Windows account users cannot change their password using this feature.

Edit Connection

Server URL

Selecting Edit Connections will display the connection configuration window. This setting holds the location of the Efalia ECM server.

The URL format is: ***http://server name/FDinstallation name***

Where:

server name denotes the server name in the network that Efalia ECM is installed. This can be an actual server name, an IP address, or a domain address, depending upon the server configuration.

FDInstallation name is the name of the virtual directory of the Efalia ECM Server installation (default: = ***FileDirector***).

Fallback URL

A secondary server connection can be set, so that if a connection to the primary server cannot be established, the AutoCapture Client will attempt to connect to the secondary server. Only connections that have been previously configured will be available for selection.

Description

A description can be applied to identify the server being connected to.

Automatically Log-In

You can specify if you want to log in to the Efalia ECM using the current windows account or if you want to specify a user name and password each time the AutoCapture Client is started.

By default the login should be automatic, using the current Windows account. In this case each local cache is assigned to the relevant user and is only accessible to that user. Which setting should be used in your environment is specific to the environment requirements and must be configured by an administrator.

To change this setting click ***Automatically log-in using current windows account*** to switch this setting on or off.

When the setting is turned off and more than one Efalia ECM server connection is set-up, the Log-in window shows a drop-down menu to select the server you want to connect to including the description of the connection.

Setup Image

An image can be displayed to visually mark the connections. This can help with identification, especially when dealing with multiple connections. The image has to be a bmp file.

Test Connection

The connection settings can be tested by selecting Test Connection. If the connection was successful, a success message will be displayed.

General Information

Help menu

AutoCapture Client Help



The Help/Contents option of the Help menu will display the AutoCapture User Guide. This is a PDF so an appropriate reader such as Adobe Acrobat Reader will need to be installed on the workstation.

About



This will display the version number of the AutoCapture Client. Also displayed is the Efalia ECM Server type and version, the number of tickers for Retrieval CD/DVD's available, and the version information for the following, if currently installed on the workstation:

Component Service

EDOC engine

OCR engine