efalia ecm

Version 4.5

Overview
Standard Plug-Ins
WinClient



efalia
smart content suite on a human scale

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WinClient Plug-Ins

Plug-ins are additional features which can be added to the WinClient to perform specific functions that are not part of the standard WinClient, and that are not required by every installation, or workstation within an installation. Customized functions can also be developed to make the system more versatile for specific business requirements.

Search & Display

Dual Search



The ***Dual Search*** plug-in gives the WinClient user the option to retrieve all documents with a field with the same value, by entering a known unique value of another field.

For example, the user knows the invoice number for a specific customer but needs all documents for this customer. Using this plug-in, the user can search for the invoice number and the WinClient shows all documents which contains the same customer number as the one with the invoice number entered above.

Clear UI



The plug-in can be used to reset the WinClient user interface. All index fields are cleared and all opened documents are closed. All lists are closed except the local documents list which shows new and checked-out documents.

Full text OCR/Zone OCR

OCR-Calculator



The ***OCR Calculator*** can add units and prices. If this information is listed on an invoice, the information can be read by OCR and listed in a calculation table.

For the ***OCR calculator***, scanned documents which list units and prices in columns are required.

CallTo – Reading Phone Numbers



The CallTo plug-in also works with OCR recognition functionalities. This plug-in reads telephone numbers from a document and filters the reading result in order to obtain a valid telephone number.

Document

Exception report



The ***Exception report*** plug-in allows you to do a search through a numbers field in a document type for any gaps or double entries in a numbering sequence.

ResponseWriter



Response Writer is used to assist in creating Microsoft Word or Excel documents with prefilled fields taken from the Efalia ECM system. It also allows using index field values of one or more connected document types.

As an example, you may wish to query an invoice received from a supplier. By using ResponseWriter, the supplier name, address and invoice information can be added to a word document, via a Word template that has the fields specified that ResponseWriter will link to.

Export

HitListDocumentExport



This plug-in can be used to export documents, with their index information. It creates an export file from the selected documents, which can be imported by the WinClient or other third-party applications.

Notes
This plug-in exports the newest version of a document without revisions and annotations.

Export Documents



The plug-in allows to create and save different export configurations.

Tiff Export



The plug-in allows to create and save different export configurations.

Miscellaneous

Activity report



The plug-in creates a summary for each user showing the number of files and pages created, modified, deleted and retrieved for the selected date

The resulting report can be exported or printed.