efalia ecm

Version 4.5

Quick Guide
AutoCapture Demo Setup



efalia
smart content suite on a human scale

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Table of Content

Overview **7**

SQL Full text catalogue *7*

AutoCapture Fields Setup **8**

Minimum requirements 9

Content of the drop-down menu AutoCapture 9

Content of the drop-down menu Contact 10

AutoCapture DocType Setup **13**

Efalia ECM AutoCapture (Plus) Inbox 13

Efalia ECM AutoCapture (Plus) Processed documents 14

Efalia ECM AutoCapture Settings **15**

Overview *15*

Demo Cabinet Settings *15*

General 15

Supplier settings 15

Matching fields 16

Clean up of the Supplier Database **20**

Reasons *20*

Advantage 20

Disadvantage 20

Script *20*

Important *20*

Overview



The optional module Efalia ECM AutoCapture (Plus) allows documents as invoices and credit notes to be automatically recognised and indexed.

Efalia ECM allows storing documents into multiple different AutoCapture (Plus) target document types per cabinet.

Efalia ECM AutoCapture (Plus) is able to recognise basic values of new suppliers without a training.

Note

This feature is only available when Efalia ECM AutoCapture (Plus) is setup with a single document type "**Processed documents**".

SQL Full text catalogue

A SQL Full text catalogue is not required for Efalia ECM AutoCapture (Plus) but it is recommended.

AutoCapture Fields Setup

Efalia ECM AutoCapture (Plus) fields are basically set-up in the same way, standard Efalia ECM fields are.

There are two types of fields, needed for Efalia ECM AutoCapture (Plus) – ***Contains: AutoCapture*** and ***Contains: Contacts***.

The type can be selected within the ***General*** tab of a Efalia ECM field.

See the drop-down list Contains:

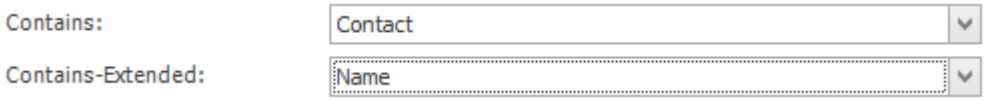


According to the selected type, the drop-down list ***Contains-Extended*** either offers different type of ***AutoCapture*** or ***Contact*** fields.

See below:



or



The Efalia ECM AutoCapture (Plus) and Contact fields come with a default field length setting. This value, except for date fields, can be changed.

Minimum requirements

For a demo setup, Efalia ECM AutoCapture (Plus) requires:

Field content type AutoCapture

- A field ***Invoice number***
- A field ***Invoice date***
- A field ***net amount***
- A field ***tax amount***
- A field ***gross amount***

Field content type Contact

A minimum of 5 fields are required. The field content type Contact is also used for matching.

Example

- A field ***Name***
- A field ***Address 1***
- A field ***Zip Code***
- A field ***City***
- A field ***Tax #***

Content of the drop-down menu AutoCapture

When ***Contains AutoCapture*** is selected, the drop-down menu ***Contains-Extended*** shows the following options:

Invoice number

10 characters have been reserved for these fields with the field content definition ***Any character***. This field is for invoice numbers, recognised by Efalia ECM AutoCapture (Plus).

Invoice date

10 characters have been reserved for these fields with the field content definition ***Date***. This field is for invoice dates, recognised by Efalia ECM AutoCapture (Plus).

Order number

10 characters have been reserved for these fields with the field content definition ***Any character***. This field is for order numbers, recognised by Efalia ECM AutoCapture (Plus).

Net1 amount; Net2 amount

12 characters have been reserved for these fields with the field content definition ***NumbersPlus***. This field is for net amounts, recognised by Efalia ECM AutoCapture (Plus).

Tax1 amount; Tax2 amount

12 characters have been reserved for these fields with the field content definition ***NumbersPlus***. This field is for tax amounts, recognised by Efalia ECM AutoCapture (Plus).

Gross amount

12 characters have been reserved for these fields with the field content definition ***NumbersPlus***. This field is for gross amounts, recognised by Efalia ECM AutoCapture (Plus).

Discount amount

12 characters have been reserved for these fields with the field content definition ***NumbersPlus***. This field is for discount amounts, recognised by Efalia ECM AutoCapture (Plus).

Advance Payment

12 characters have been reserved for these fields with the field content definition ***NumbersPlus***. This field is for amounts of advanced payments, recognised by Efalia ECM AutoCapture (Plus).

Content of the drop-down menu Contact

When ***Contains Contact*** is selected, the drop-down menu ***Contains-Extended*** shows the following options:

ID

10 characters have been reserved for these fields with the field content definition ***Numbers***. This field is for supplier IDs of the Efalia ECM AutoCapture (Plus) routine.

Name

50 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier names, recognised by Efalia ECM AutoCapture (Plus).

Address1

50 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's street name and number, recognised by Efalia ECM AutoCapture (Plus).

Address2

50 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's street name and number, recognised by Efalia ECM AutoCapture (Plus).

ZIP Code

10 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's postcode, recognised by Efalia ECM AutoCapture (Plus).

City

50 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's city, recognised by Efalia ECM AutoCapture (Plus).

State

50 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's state, recognised by Efalia ECM AutoCapture (Plus).

Country

50 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's country, recognised by Efalia ECM AutoCapture (Plus).

Phone

10 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's phone number, recognised by Efalia ECM AutoCapture (Plus).

Fax

10 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's fax number, recognised by Efalia ECM AutoCapture (Plus).

WebSite

50 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's website, recognised by Efalia ECM AutoCapture (Plus).

VAT-ID

50 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's VAT identification number, recognised by Efalia ECM AutoCapture (Plus).

Tax

50 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's tax number, recognised by Efalia ECM AutoCapture (Plus).

Bank name

50 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's bank name, recognised by Efalia ECM AutoCapture (Plus).

Bank

50 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's bank number, recognised by Efalia ECM AutoCapture (Plus).

Account

50 characters have been reserved for these fields with the field content definition ***All characters***. This field is for supplier's account number, recognised by Efalia ECM AutoCapture (Plus).

AutoCapture DocType Setup

Efalia ECM AutoCapture (Plus) document types are defined within the General tab of a created or selected document type.

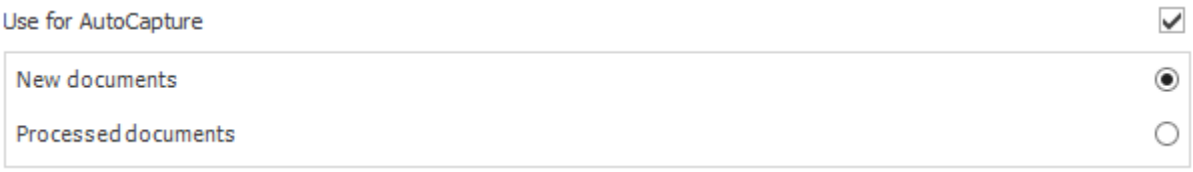
The AutoCapture module uses two type of document types – an inbox and outboxes.

Note

It is recommended using only one document type for **Processed documents**. This allows Efalia ECM AutoCapture (Plus) to use the **Intelligent Recognition** feature.

Efalia ECM AutoCapture (Plus) Inbox

A document type is specified as AutoCapture inbox by selecting the following two checkboxes on the tab ***General***:



Note

The AutoCapture (Plus) inbox does not necessary require any fields. Nonetheless, it is recommended adding a date field for administrative purposes e.g.: Scan date/Import date.

Efalia ECM AutoCapture (Plus) Processed documents

A document type is specified as AutoCapture Processed documents by selecting the following two checkboxes on the tab ***General***:



The document type used for Efalia ECM AutoCapture (Plus) ***Processed documents*** must contain at least the following fields:

Field content type AutoCapture

- A field ***Invoice number***
- A field ***Invoice date***
- A field ***gross amount***

Field content type Contact

A minimum of 5 fields are required for a proper matching. The field content type ***Contact*** is also used for matching.

Example

- A field ***Name***
- A field ***Address 1***
- A field ***Zip Code***
- A field ***City***
- A field ***Tax #***

Efalia ECM AutoCapture Settings

Overview

The node AutoCapture in the Efalia ECM Enterprise Manager user interface, is used for the general settings like supplier data base and matching fields.

Note

For demo environments, the supplier source **Cabinet database** is recommended.

Demo Cabinet Settings

General

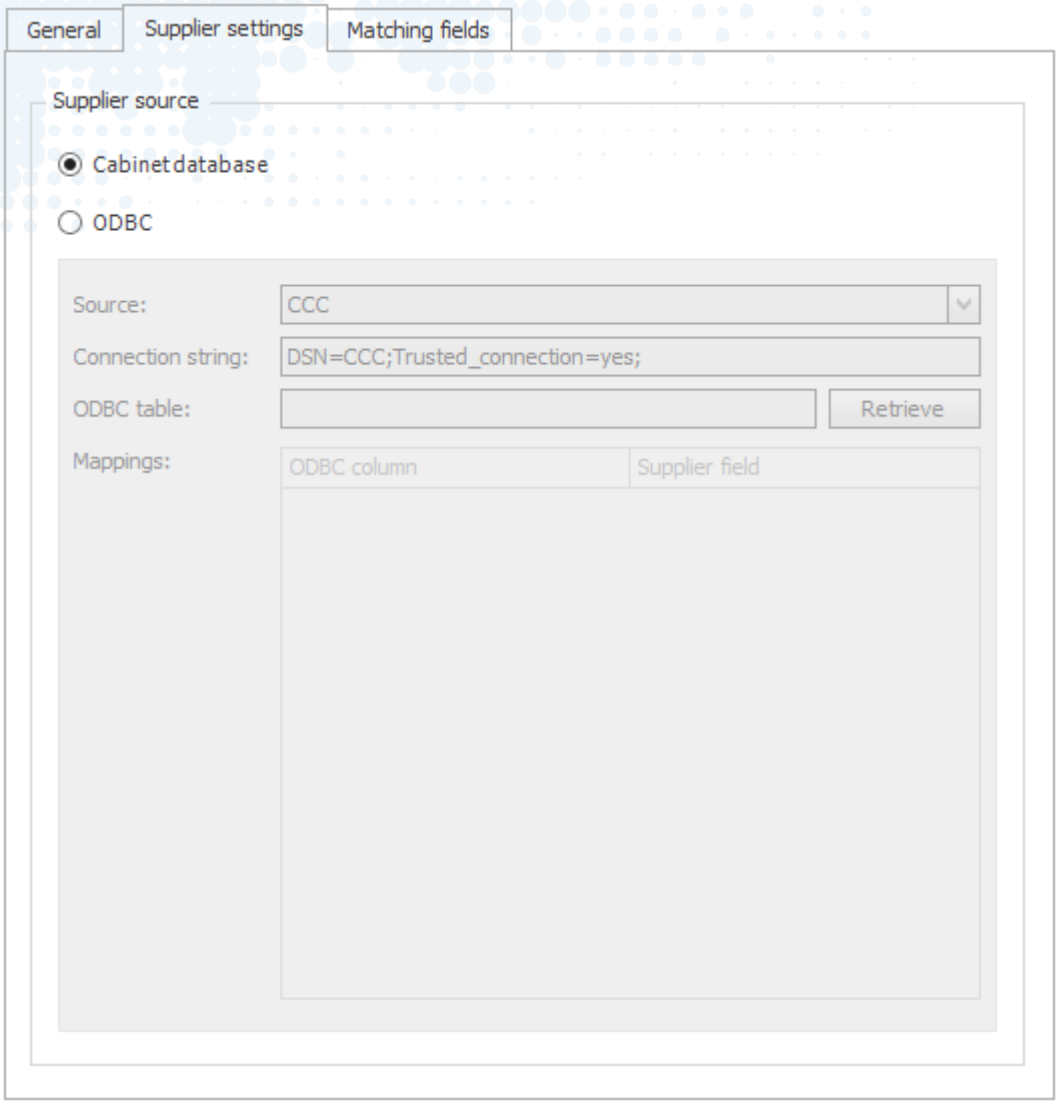
The default settings within the tab General need not to be changed.

Supplier settings

Creating a universal demo cabinet, it is easier using the option Cabinet database.

This allows a quick and fast cleaning of trained suppliers.

Screenshot



Matching fields

A minimum of 5 fields must be selected for matching.

There are no recommendations as the information printed on invoices varies in each country.

Note

Please ensure that the information selected for matching is printed on the invoices.

Example

General | Supplier settings | Matching fields

Here you can configure the contact fields for form recognition.

Supplier field	Custom label	Use for matching	Show in client
Name		☑	☑
Address 1		☑	☑
Address 2		☐	☐
ZIP		☑	☑
City		☑	☑
State / Region		☐	☐
Country		☐	☐
Phone #		☐	☐
Fax #		☐	☐
E-mail		☐	☐
Web site		☐	☐
VAT-ID		☑	☑
Tax #		☐	☐
Bank name		☐	☐
Bank #		☐	☐
Account #		☐	☐

Supplier field

This column lists all AutoCapture fields. These names are as they stand.

Custom label

Within this column, aliases can be set for one, multiple or all names listed in the column Supplier field.

These aliases are shown in the Efalia ECM AutoCapture (Plus) Client instead of the original labels.

Use for matching

In this column, the rules for a clear identification can be set individually for each Efalia ECM system.

Efalia ECM AutoCapture (Plus) uses an internal threshold value for a successful matching. The threshold value is 75% of the fields selected as ***Use for matching***.

Example 1

Only the minimum of three Efalia ECM AutoCapture (Plus) fields have been selected as ***Use for matching***, e.g. ***Name***, ***Address 1*** and ***ZIP***.

In this example, each field represents ~33.3%. In this case all three fields must be identified.

Example 2

Four Efalia ECM AutoCapture (Plus) fields have been selected as ***Use for matching***, e.g. ***Name***, ***Address 1***, ***ZIP*** and ***VAT-ID***.

In this example, each field represents ~ 25%. In this case three out of the four fields must be identified.

Example 1

Seven Efalia ECM AutoCapture (Plus) fields have been selected as ***Use for matching***, e.g. ***Name***, ***Address 1***, ***ZIP***, ***City***, ***Phone #***, ***Tax #*** and ***VAT-ID***,

In this example, each field represents ~ 14,29%. In this case six out of the seven fields must be identified.

Five matching fields would be ~71,43% and below the required threshold value of 75%.

Note

At least **three** fields must be selected from the column **Use for matching**, when the default is changed.

Show in client

This column defines, which ***Supplier fields*** are displayed in Efalia ECM AutoCapture (Plus) Client when a document is displayed.

When a field is marked for both, ***Use for matching*** and ***Show in client***, the name is displayed in bold.

Clean up of the Supplier Database

Reasons

Using a supplier database stored within the Efalia ECM cabinet, allows fast a clean-up after a presentation and resets the trained suppliers.

Advantage

A clean database allows a presentation with a small standard range of documents.

Disadvantage

The feature ***Intelligent recognition*** is not available in a short presentation unless the minimum of 10 forms are trained.

Note

The Intelligent recognition feature of Efalia ECM AutoCapture (Plus) needs at least 10 trained forms.

Script

The following script allows a fast clean-up of the supplier and forms data stored in an Efalia ECM cabinet. The script can be stored and run using Efalia ECM Script option.

```
Use FD_Your Cabinet ID;
TRUNCATE TABLE Contacts;
TRUNCATE TABLE AutoCaptureForms;
```

Important

After the database wipe, the Windows Service ***Efalia ECM Scheduler Service*** must be restarted and ***IISreset*** must be perfomed.