efalia ecm

Version 4.5

Quick Guide
OfficeLink



efalia
smart content suite on a human scale

Obere Kaiserswerther Straße 17, 47249 Duisburg, Germany
T: +49 203 60 888 0 / info.de@efalia.com

Disclaimer

Efalia GmbH makes no representation or warranties with respect to the contents or use of this document and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Efalia GmbH reserves the right to revise this publication and to make changes to its content, at any time, without obligation to notify any person or entity of such revisions or changes.

Further, Efalia GmbH makes no representations or warranties with respect to any Efalia ECM software, and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Efalia GmbH reserves the right to make changes to any or all parts of Efalia ECM software, at any time, without obligation to notify any person or entity of such changes.

Copyright

© 2025 Efalia GmbH. All Rights Reserved.



No part of this document may be reproduced, transmitted or stored in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Efalia GmbH.

Efalia ECM is a registered trademark of Efalia GmbH.

Windows is a registered trademark of Microsoft Corporation in the United States and other countries.

Other product and company names mentioned herein may be trademarks of their respective owners.

Africa, Asia, Australia, Europe and USA

Efalia GmbH
Obere Kaiserswerther Str. 17
D-47249 Duisburg
Germany

Email: info.de@efalia.com
Web: www.efalia.com

UK and Eire

Efalia Ltd
Becket House
1 Lambeth Palace Road
London, SE1 7EU
United Kingdom

Email: info.uk@efalia.com
Web: www.efalia.com

Software Licence Agreement

IMPORTANT: Read this agreement before installing Efalia ECM. By installing Efalia ECM you are deemed to agree to be bound by this agreement.

This licence agreement is a legal document between you and Efalia GmbH. If you do not agree to the terms of this agreement return the software CD and accompanying documentation (the "Documentation") and other items to the place from where you obtained them for a refund before they are marked or damaged in any way.

In consideration of the right to use the Software you agree to abide by the terms and conditions of this agreement.

GRANT OF LICENCE

The Software consists of the software modules by:

Efalia GmbH, a German public listed company having its place of business at Obere Kaiserswerther Str. 17, 47249 Duisburg, Germany ("Efalia");

Microsoft Corp., a Washington corporation having its place of business at 1 Microsoft Way, Redmond, WA 98052-6399, USA ("Microsoft");

Softland, a Romanian company having its place of business at str. Traian Grozavescu no. 2/1 Cluj-Napoca 400305, Romania ("Softland");

Tungsten Automation Corporation, a Florida company having its place of business at 333 Las Olas Way, Suite 212, Ft Lauderdale, FL 33301, USA ("Tungsten;");

Developer Express Inc., a Nevada company having its place of business at 6340 Mcleod Dr. Suite1, Las Vegas, NV 89120, USA ("DevExpress");

Oracle Corporation, a Californian company having its place of business at 500 Oracle Parkway, M/S 5op7, Redwood Shores, California 94065, USA ("Oracle");

Apryse, a British Columbia corporation, having offices at 838 West Hastings Street, Suite 500, Vancouver, British Columbia, V6C 0A6, Canada ("Apryse").

The software consists also of Open Source modules, listed below:

Software, which is based in part on the work of the Independent JPEG Group.

Cryptographic software written by Eric Young (eay@cryptsoft.com).

It uses the FreeImage open source image library. See http://freeimage.sourceforge.net for details.

FreeImage is used under the FreeImage Public License (FIPL) version 1.0.

LibTIFF Copyright (c) 1988-1997 Sam Leffler

LibTIFF Copyright (c) 1991-1997 Silicon Graphics, Inc.

LibTIFF: Permission to use, copy, modify, distribute, and sell this software and its documentation for any purpose is hereby granted without fee, provided that (i) the above copyright notices and this permission notice appear in all copies of the software and related documentation, and (ii) the names of Sam Leffler and Silicon Graphics may not be used in any advertising or publicity relating to the software without the specific, prior written permission of Sam Leffler and Silicon Graphics.

You understand and acknowledge that any software module included in the Software may have utility with or be able to be called by other software and/or hardware, which Efalia considers to be an unauthorised use of the Software. Accordingly, you agree that you will use such software modules only as part of the Software and not in conjunction with, or as part of, or as a component of other software and/or hardware which makes calls to such software modules.

Efalia grants you the personal non-exclusive rights:

For a single-user version of the Software, to install and use the Software for internal purposes only on a single computer (the Software is considered in use when it is installed in the temporary memory, i.e. RAM, or the permanent memory, i.e. Hard Disk Drive).

For a multi-user version of the Software, to install and use the Software for internal purposes only for the number of computers or simultaneous users identified in the Installation Configuration sheet of the Software package (for example, if you have purchased a 5-User licence you may install the Software for simultaneous use by up to 5 Users on a network).

BACKUP COPY

You may make whatever copies you deem appropriate from the Efalia ECM "delivery" Compact Disc, the Programs, Example Files and any other promotional material that may be included thereon. The Application Manual, or any part thereof, may be reproduced in sufficient quantity to support only the number of users licenced to you and no more. You must reproduce and include on the backup copy the copyright notice and other ownership or proprietary legends that are on the original copy of the Software.

You may NOT make or attempt to make any copy whatsoever of the Efalia ECM Licence. ANY ATTEMPT TO COPY, TRANSFER OR RESTORE THE LICENCE MAY CORRUPT THE ENABLING LICENCE. The Licence, once enabled, represents the full purchase value of the licence to use the Efalia ECM Software. The enabled Licence can be manipulated ONLY by the commands within the Efalia ECM application.

RESTRICTIONS

You may not market, distribute or transfer the Software or the Documentation to others, or electronically transfer the Software from one computer to another over a network except as expressly provided herein.

You may not de-compile, reverse engineer, disassemble or otherwise reduce the code of the Software to a human perceivable form.

You may not modify, adapt, translate, rent, lease or loan the Software or the Documentation or create derivative works based on the Software or the Documentation.

OWNERSHIP AND COPYRIGHT

Efalia, Microsoft, Stellent, Tungsten, DevExpress, Apryse and Pixel reserve all rights to their respective software modules of the Software and the Documentation. The Software and the Documentation is copyrighted. Unauthorised copying of the Software, including portions thereof, or the Documentation is expressly forbidden.

EXPORT CONTROL

You agree that the Software and Documentation will not be shipped, transferred or exported into any country or used in any manner prohibited by the United States Export Administration Act or any other applicable export control laws, restrictions or regulations of the countries involved.

SUPPORT AND UPDATES

Efalia, Efalia's subsidiaries or affiliates, their distributors and dealers are not responsible for maintaining or helping you to use the Software and the Documentation, excepting where agreements have been entered into between specific parties, i.e. Efalia: Distributor, Distributor: Dealer, Dealer: End User.

No updates, fixes or support will be made available for the Software and Documentation other than by publishing such revisions on the Efalia web site: https://www.spielberg.de or https://www.efalia.com

Any updates, fixes or support will be made available on the said web site solely at the discretion of Efalia, who is under no obligation whatsoever so to do.

LIMITED WARRANTY AND DISCLAIMER OF INDEMNITY

Limited Warranty. The Software and documentation is provided "as is" without warranty of any kind, either express or implied, including, but not limited to implied warranties of merchantability and fitness for a particular purpose. The entire risk as to quality and performance of the Software and documentations is with you. Should the Software prove defective you (and not Efalia, Efalia's affiliates, their distributors or dealers) assume the entire cost of all necessary servicing, repair or correction. Some states or jurisdictions no not allow the exclusion of implied warranties, so the above exclusion may not apply to you. This warranty gives you specific legal rights and you may also have other rights which vary according to state or jurisdiction.

Efalia, Efalia's affiliates, their distributors and dealers do not warrant that the functions contained in the Software will meet your requirements or that the operation of the Software will meet your requirements or that the operation of the Software will be uninterrupted or error free.

However, Efalia or Efalia’s affiliates warrants a compact disc or diskette on which the Software is stored to be free from defects in materials and workmanship under normal use for a period of ninety (90) days from the date you purchased the same, as evidenced by a receipt or otherwise. Some states or jurisdictions do not allow limitations on duration of an implied warranty, so the above limitation may not apply to you.

CUSTOMER REMEDIES

Efalia's entire liability and your exclusive remedy shall be the replacement of the Compact Disc and/or Diskette not meeting the LIMITED WARRANTY and which is returned to Efalia or Efalia's marketing affiliate, Efalia Ltd, with a copy of your receipt or otherwise. The LIMITED WARRANTY is void if failure of the Compact Disc has resulted from accident, abuse or misapplication of the software.

No liability for consequential damages. In no event shall Efalia, or Efalia's affiliates, their distributors or dealers be liable for any damages whatsoever (including without limitation, direct or indirect damages for personal injury, loss of business profits, business interruption, loss of business information, or other consequential or incidental damages) arising out of the software, the use thereof or inability to use the software even if Efalia, Efalia's affiliates, their distributors or dealers has been advised of the possibility of such damages. Some states or jurisdictions do not allow the exclusion or limitation of liability for consequential or incidental damages, so the above limitation may not apply to you.

Disclaimer of indemnity. Efalia, Efalia's affiliates, their distributors and dealers shall have no obligation to indemnify you against any claim or suit brought to you by a third party alleging that the Software or the use thereof infringes any intellectual property of such third party.

TERM

This agreement is effective upon the installation of Efalia ECM Server and Client and remains in effect until terminated. You may terminate this agreement by destroying the Software and any copy thereof. This agreement will also terminate if you fail to comply with any of the terms of this agreement. In addition to Efalia enforcing its legal rights, you must then promptly destroy the Software and any copy thereof.

ACKNOWLEDGEMENT

By selecting the 'Yes, I accept the agreement' option during the software installation process, you acknowledge that you have read this agreement, understand it and agree to be bound by its terms and conditions. You further agree that this agreement is the complete and exclusive statement of agreement between you and Efalia concerning the subject matter hereof, which supersedes any proposals or prior agreements, oral or written, and any other communication between you and Efalia relating to the subject matter hereof. No amendment to this agreement shall be effective unless signed by a duly authorised representative of Efalia.

Should you have any questions concerning this agreement, or if you desire to contact Efalia for any reason, please write to your authorised supplier requesting that they pass your correspondence to Efalia GmbH.

Table of Content

Overview **7**

Efalia ECM Component Service *7*

Efalia ECM OfficeLink *7*

Installation **8**

Component Service with OfficeLink *8*

Microsoft Word, Excel and PowerPoint **9**

Save to Efalia ECM (PDF/A) *9*

Save to Efalia ECM *9*

Microsoft Outlook **10**

Save to Efalia ECM (PDF/A) *10*

Save to Efalia ECM *11*

Save to Efalia ECM (Message) *12*

Save to Efalia ECM (Attachments) *12*

This is private mail *12*

*Show ECM column** *13*

*Open mail in ECM** *13*

Overview

Efalia ECM Component Service

The Component Service Setup installs the document viewer, which allows users to display electronic documents and create thumbnails of electronic documents. With the viewer, many different document formats can be displayed, without the originating application having to be installed.

Efalia ECM OfficeLink

The Efalia ECM OfficeLink is an Add-on for Microsoft Office products and allows documents to be saved directly into Efalia ECM from these applications.

Depending on the selected option, the documents are either stored in original format or converted into the PDF/A format.

Installation

Component Service with OfficeLink

The setup of FileDirector Component Service also includes the option for the installation of FileDirector OfficeLink. In default, the checkbox is selected and the installation routine will install FileDirector Component Service inclusive the FileDirector OfficeLink.

- Select Install for Component Service on the web page
- The initial window will open, click ***Next*** to continue. If you are asked for a signature, confirm with ***Yes***.
- Afterwards an installation path can be selected. This path is later automatically used for the installation of the OCR engine.
- Selecting ***Next*** will complete the installation.

Note:
If the Component Service is installed with the option ***Just me*** the button in the Office Application only exists for the user who installed the Component Service.

Microsoft Word, Excel and PowerPoint

The Office Link offers different options for storing Microsoft Office documents directly in Efalia ECM.

Save to Efalia ECM (PDF/A)



This option stores the active Microsoft Office document directly into Efalia ECM. The document is converted into PDF/A format.

Save to Efalia ECM



This option stores the active Microsoft Office document in original format directly into Efalia ECM.

Using this option, the document can be re-opened directly from Efalia ECM WinClient and further edited in the corresponding Microsoft Office application. The edited document can be stored back into Efalia ECM, either as a revision or a new document.

Microsoft Outlook

The Office Link offers different options for storing emails or part of emails into Efalia ECM.

Save to Efalia ECM (PDF/A)



Stores the selected email in Efalia ECM in PDF/A format.

This option converts the email into PDF/A format, including corresponding attachments. The formats permitted for conversion can be defined within the app.xml of Efalia ECM Component Service.

The default installation path is:

C:\Program Files (x86)\Efalia GmbH\Efalia ECM Component Service

In default, the key does not contain any predefined file formats. The added file formats must each be separated with a semicolon.

Empty Key

If the key does not contain any file formats, all attachments contained in the e-mail will be saved in their original format within the PDF/A file, as an attachment.

Customised Key

If the key contains file formats, all corresponding attachments are converted and appended to the PDF/A document.

File types that are not listed and attachments that cannot be converted are not imported.

A corresponding warning message is displayed.

Example

Default key:

```
<add key="ImportedFileTypes" value=" " />
```

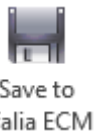
Customised key:

```
<add key="ImportedFileTypes" value="doc;docx;xls;xlsx;pdf;txt;jpg;tif;tiff;png" />
```

Note

The changes will only take effect after a restart of Microsoft Outlook.

Save to Efalia ECM



This stores the email in original format, including any attachments.

The attachments can be opened via a link.

The corresponding attachments are displayed below the header data in the viewer.

Example

To: Our_Customer@company.de
Importance: Normal
Sensitivity: None
Subject: OfficeLink und Microsoft Outlook

Example.pdf

Save to Efalia ECM (Message)



Save to Efalia ECM (Message)

This option stores the body of the selected email in original format in Efalia ECM. Any attachments that may exist are not stored in Efalia ECM.

Save to Efalia ECM (Attachments)



Save to Efalia ECM (Attachments)

Only the attachments of the e-mail are stored in Efalia ECM in the original format.

This is private mail



This is private mail

Via this button, e-mails that have been saved in the ECM system either via the OfficeLink or the optional Efalia ECM MailStore module can be marked as private mail.

This marks the corresponding e-mail as deleted in the ECM system.

Documents marked as deleted are no longer displayed in the hit list during a search or advanced search.

Show ECM column*



This option toggles the column ***ECM*** on/off.



This shows whether an email has been archived in the ECM system via the Efalia ECM MailS

Note

* This column only contains information if the corresponding email was archived directly via the Microsoft Exchange Server using the Efalia ECM MailStore module.

This column is not used for emails archived via the Efalia ECM OfficeLink or otherwise in the Efalia ECM system.

Open mail in ECM*



Using this option, an email can be opened in Efalia ECM WinClient. Requirement is, that the email was stored in Efalia ECM via the MailStore option

Note

*This option is only active if the selected email was previously archived via the optional Efalia ECM MailStore module.

This option is not active for emails archived via the Efalia ECM OfficeLink or otherwise in the Efalia ECM system.