efalia ecm

Version 4.1

Quick Guide
WebClient 1.1



efalia
smart content suite on a human scale

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

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Welcome to Efalia ECM

In addition to the Efalia ECM WinClient and Efalia ECM Web, the Efalia ECM WebClient is the latest application to work with documents stored or to be stored in Efalia ECM Cabinets. Due to its Blazor WebAssembly based technology, Efalia ECM WebClient is an ideal solution for a modern working environment.

Using the WebClient, not only standard tasks such as document import, retrieval and editing can be done.

In addition, the WebClient can also be used to take part in Efalia ECM BusinessProcessManagement.

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 different document types. Index fields are assigned to these document types. In the process of archiving a document, the respective index fields can be filled with corresponding index data. This index information is used for a later retrieval.

Although users may have access to a cabinet, they are only able to work with the 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 may only retrieve and display documents from another document type.

Documents scanned in black and white are stored as TIFF; coloured documents are stored as compressed JPEG files. In addition, most Efalia ECM built-in scanner drivers offer a conversion to PDF/A.

If electronic documents (EDocs) are archived, they are saved in their original format and can be viewed in Efalia ECM WinClient via an integrated viewer and in Efalia ECM Web and WebClient by temporarily converting them to PDF format - even if the original application is not installed on the search computer. Efalia ECM WinClient can be used to make changes to electronic documents (EDocs), provided the original application (e.g. Word) is installed. In regular document types, changes are always saved in revisions, i.e. the original version of the respective document is retained.

Requirements

Since the application is a Blazor WebAssembly technology based solution, it is run directly within the browser, the requirements for the server providing the application are simplified to an installed and configured Internet Information Service (IIS) or an appropriate alternative e.g. Apache.

The following operating systems are recommended:

Host

All current Microsoft Windows server and client operating systems for on premise systems are supported.

Note

However, Microsoft client operating systems are only recommended for evaluation environments.

For detailed Microsoft Product and Services Lifecycle information also see:

https://docs.microsoft.com/en-us/lifecycle/products/

Browser

Apple Safari, including iOS	Latest version
Google Chrome, including Android	Latest version
Microsoft Edge	Latest version
Mozilla Firefox	Latest version

Note

Some functions are not supported by all browsers.

In order to use the full range of functions, a Microsoft Windows environment and **Microsoft Edge** and **Google Chrome** are recommended.

WebScan

The WebScan Clients are distributed to clients as ***ClickOnce*** solutions and are started directly from the web browser.

Requirements

The following requirements must be met:

- Latest Microsoft .Net Framework 4.x or higher

One of the following browsers:

- Microsoft Edge
- Mozilla Firefox (Add-on: Microsoft .Net Framework Assistant)
- Google Chrome (Add-on: Click-Once for Google Chrome)

Note

The browser add-ons can be acquired and installed through the respective browser's add-ons option. Additional help concerning the installation procedure can be found in your browser's help file.

Installing ClickOnce Solutions

Microsoft Edge ClickOnce Support

ClickOnce is supported.

You can check whether the support is activated on the respective system via ***edge://flags/#edge-click-once*** and select the preferred setting in the drop-down list.

For more information, also see: *ClickOnce and DirectInvoke in Microsoft Edge | Microsoft Docs*

Google Chrome ClickOnce Solution

ClickOnce is supported in Google Chrome via 3rd party applications.

It may be necessary to run a separate file after adding the application to complete the installation process.

Example

ClickOnce for Google Chrome - Chrome Web Store

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Mozilla Firefox ClickOnce Solution

ClickOnce is supported in Mozilla Firefox via 3rd party applications.

Example

https://addons.mozilla.org/de/firefox/addon/breez-clickonce/?src=search

Add the extension and restart the browser.

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Connection to the WebClient

Efalia ECM WebClient is a browser application. Just connect to Efalia ECM as to other websites by typing in the URL into the browser address bar.

http(s)://[server name/server IP address]/webclient



Install as Progressive Web App (PWA)

Since Efalia ECM WebClient is based on the Blazor WebAssembly technology, it can also be easily installed as an app after the first access to the URL.

User Licences

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

Only as many users can connect to the Efalia ECM Server and logon as licences are available. After ***20 minutes*** of idle time (this is a default value and can be changed), an Efalia ECM WebClient session will automatically log off and free the licence for another user.

It is possible to specify more users in the Efalia ECM ***fd-scan*** and ***fd-user*** groups than concurrent 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 retrieve documents.

Restrictions: fd-web Accounts

The following functions are not available for accounts in the ***fd-web*** group:

- Only the ***most recent revision of a document is accessible***.
- The option ***Info search*** is not available.
- The option ***Send to...Email (PDF)*** is not available.
- The option ***Start application*** is not available.
- The option ***Absence settings*** is not available.
- The option ***Contacts*** is not available.
- The ***Document info***, is limited to the tab ***General***.

If the appropriate rights have been assigned, retrieved documents can be saved and printed.

Electronic Documents

How are eDocs stored in Efalia ECM?

Any electronic document that is not imported in TIFF or JPG format is saved as a single-page Efalia ECM document, even if the file itself contains multiple pages. These file formats will be converted to PDF for display in the Efalia ECM WebClient.

How can eDocs be displayed?

EDocs are converted to PDF for display in the Efalia ECM WebClient. This means that a Word file with four pages, which was saved as a *.doc or *. docx file in Efalia ECM using the Efalia ECM OfficeLink, is displayed as a PDF document with four pages.

This conversion only affects the display in Efalia ECM WebClient. The document itself remains in Efalia ECM as a Word file.

Page selection when displaying eDocs

Scrolling through an electronic document is done by scrolling the mouse wheel or the scroll bar in the display area, see Extended Options/Panel.

Capture of electronic documents

Electronic documents can be saved in Efalia ECM in different ways.

For the Efalia ECM WebClient, the upload option is available in the ***New Document*** workspace.

Edit electronic documents

Working with WebClient, electronic documents must be saved on the local computer and the opened with the original application. After the changes have been made, the edited file can be uploaded via WebClient, again.

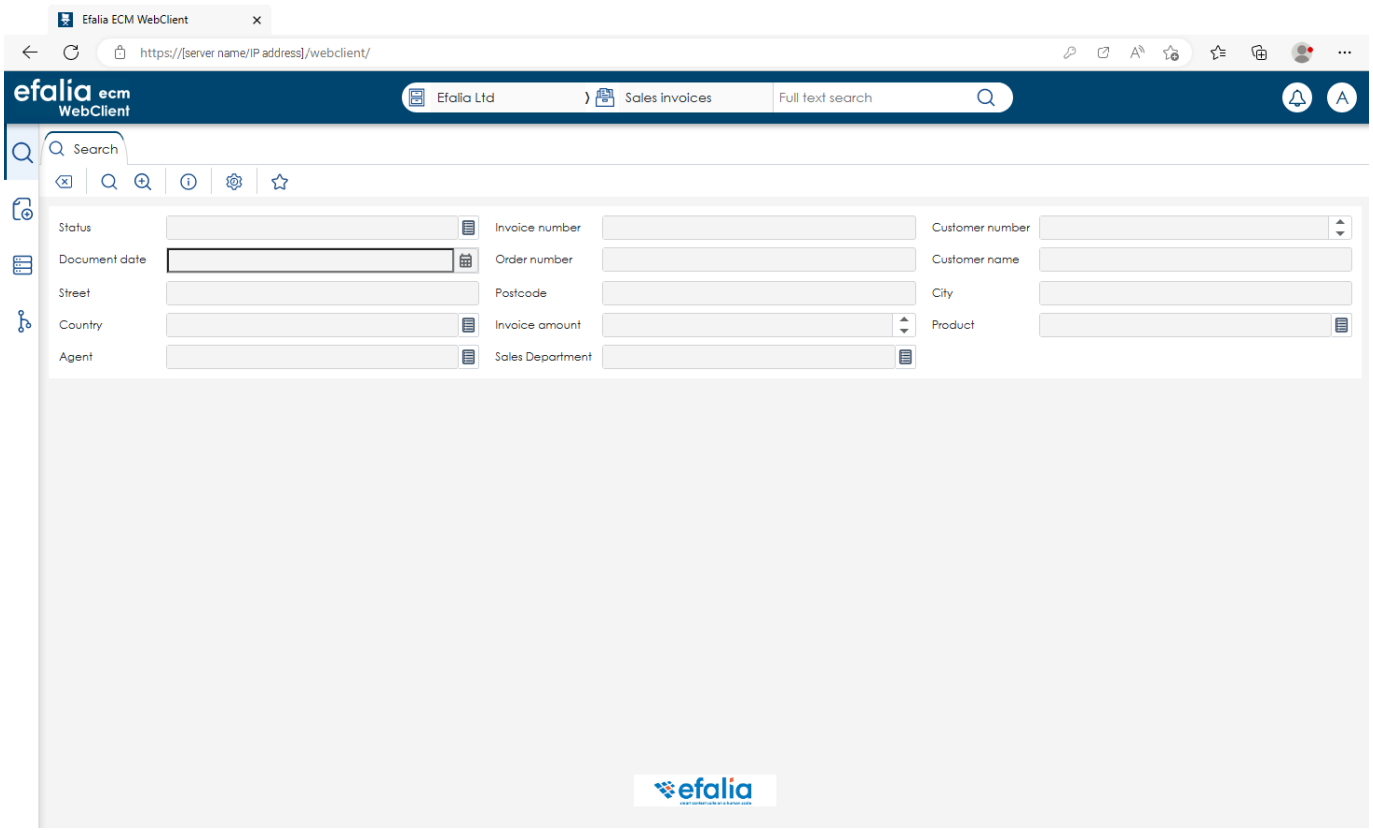
The WebClient Desktop

Efalia ECM WebClient can be used in two ways – within a current browser or as an app.

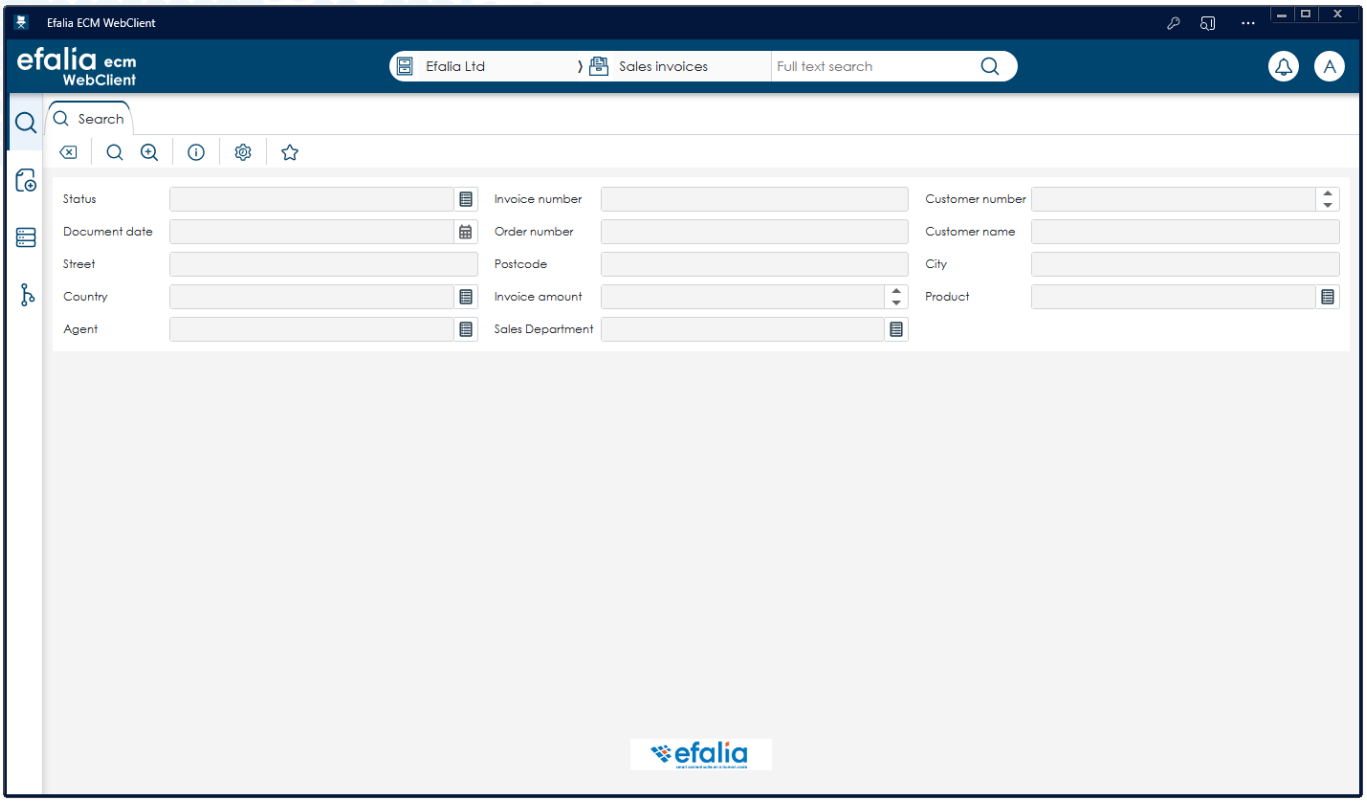
Both ways offer the same general layout.

In general, the user interface is organized into four areas. It starts at the top with the ***Title bar*** and continues, from the left to the right, with the ***Action bar***, ***Navigation bar*** and the ***Action tab(s)***.

Browser



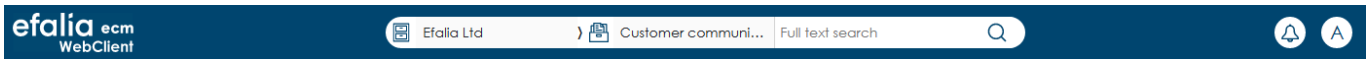
App



Areas

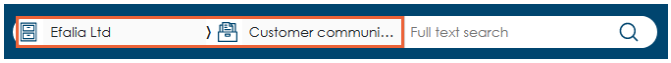
The different areas of the Efalia ECM WebClient user interface provide quick access to the most important functions, for working with documents.

Title bar



The Title bar contains all necessary basic information at a glance.

Cabinet and Document Type Selection



In the centre is the option for the cabinet and the document type.

Full Text Search



Right next to it is the option for the full text search.

Notifications



All necessary information about actions within Efalia ECM WebClient is displayed here, such as successful check-in actions.

Menu



The button shows the initial of the logged-in user. The first letter of the user name is displayed as the initial. The menu provides the sections ***Settings***, ***About*** and ***Log-out***.

Settings



The Settings area provides the tabs for ***General Settings***, ***Password*** and ***Layout***.

About



This provides all information about the Efalia ECM WebClient version in use.

Log-out



This logs off the logged-in user and displays the login screen again.

Action bar









The ***Action bar*** is the main area of Efalia ECM WebClient. This is where you select the area on the task you want to do with WebClient. The four areas are ***Search***, ***New document***, ***Local documents*** and ***Process management***.

Search



The ***Search*** area contains the various options to search for documents within Efalia ECM - except for the ***Full text search***. This is located in the ***Title bar***.

New document



The area ***New document*** provides all necessary options to create new documents using the WebClient application, this includes access to available scan profiles and Efalia ECM Forms via a drop-down menu.

Local documents



The area ***Local documents*** contains a list with all documents, stored locally on the client system, with a quick access to the view and edit functionalities.

Process management



The area ***Process management*** gives you access to work with your Efalia ECM documents, sent to you either by other Efalia ECM users, via an ad hoc process or the BusinessProcessManagement.

Navigation Bar (Filing System only)

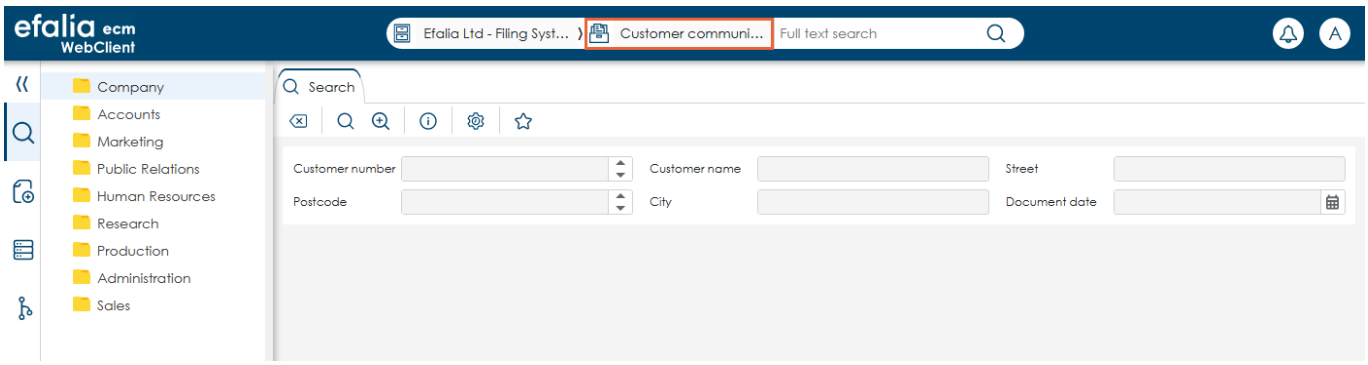
This bar is only displayed if the selected cabinet contains a filing system structure.

In addition, the document type selected in the ***Title bar*** must have further levels.

If the selected document type does not have any further levels, the area is shown as ***Empty***.

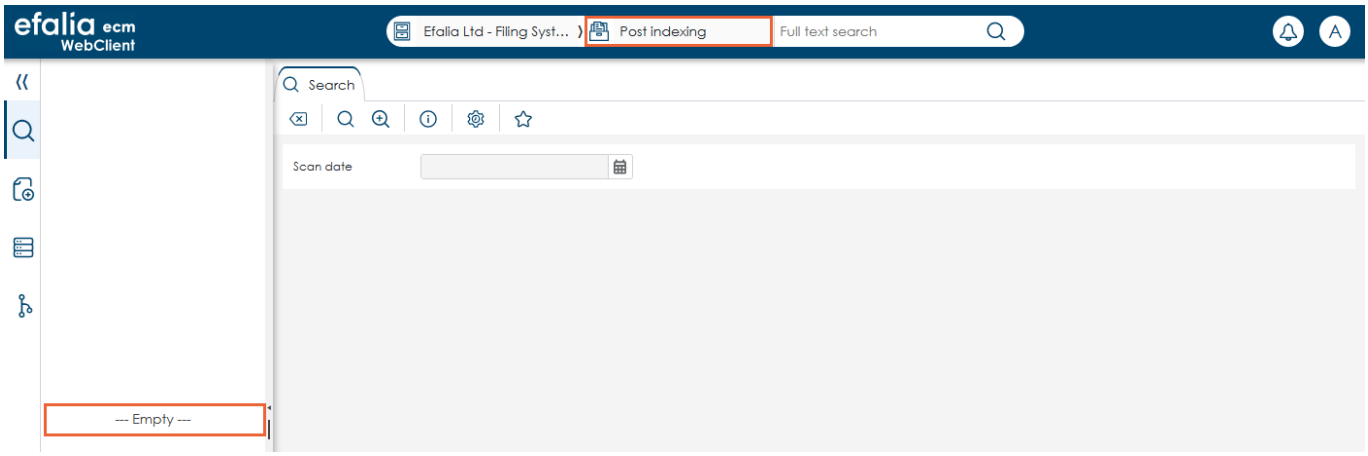
Example

Document type with further levels



Example

Document type without further levels



Favourites

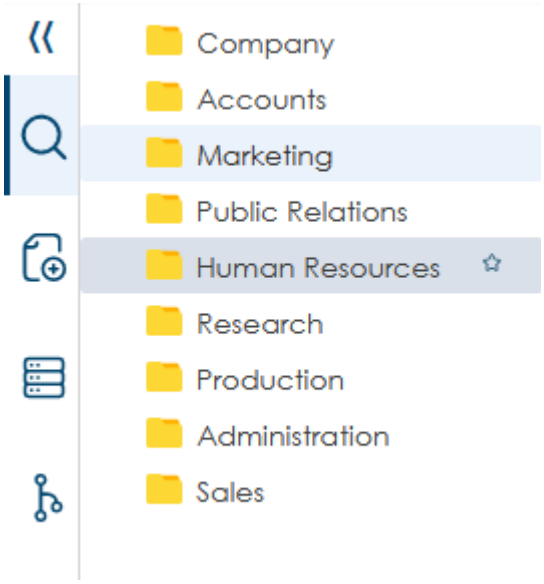
/

Working within a cabinet, built with the ***Filing System Designer***, allows you to mark ***Index Field Levels*** as ***Favourites***.

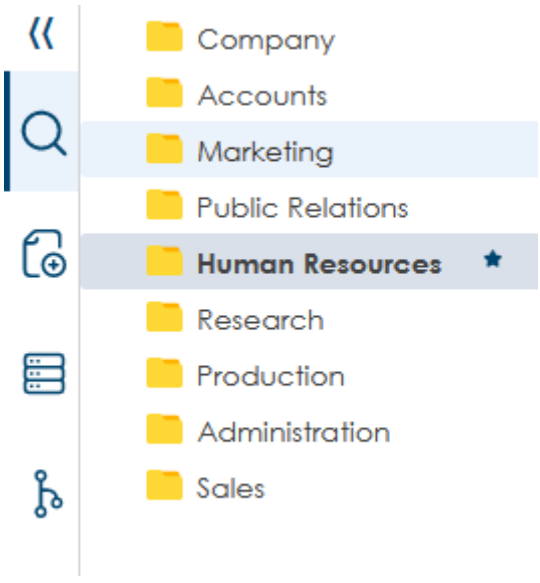
Levels that have been marked as ***Favourites*** are additionally highlighted in bold.

Example

The level ***Human Resources*** is selected and can be marked as ***Favourite***.



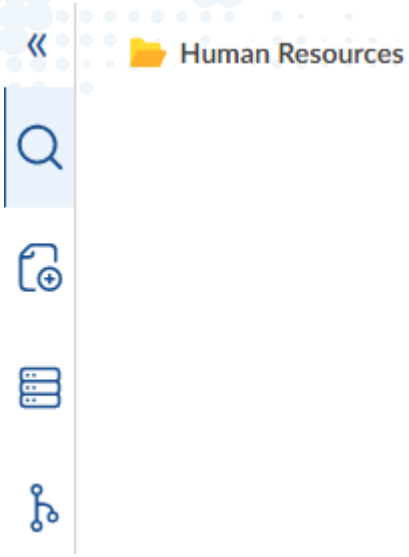
The level ***Human Resources*** has been marked as ***Favourite***.



Index Field Levels marked as ***Favourites*** can be displayed exclusively. The option ***Favourites*** in the context menu of the right mouse button allows you to toggle between displaying all levels or only those levels that have previously been marked as ***Favourites***.

Referring to the example above, when the option is selected, only the level ***Human Resources*** is displayed in the ***Navigation Bar*** area.

All other levels are hidden.



Expand all / Collapse all



Working within a cabinet, built with the ***Filing System Designer***, this option allows you to show or hide all available levels of the selected document type via the context menu of the right mouse button.

Deselect all



This allows you to deselect the currently selected node without selecting a new node.

Action Tab(s)

The action tabs displayed in each case are context-based.

Search



After selecting ***Search*** from the ***Action bar***, the corresponding ***Action tab*** opens.

On the Toolbar of this ***action tab***, you will find several search options such as ***Search***, ***Extended search***, ***Info search***, ***Search history*** and the fields connected to the selected document type are displayed.

The selected document type is displayed in the Title bar and can be switched there.

Icon	Function
	Clear index fields
	Search
	Extended search
	Info search
	Search history
	Show operators (Toggle)

The option ***Show operators*** allows you to toggle whether available operators for the fields are displayed or not.

In default, fields are displayed without the operator drop-down option visible.

Example

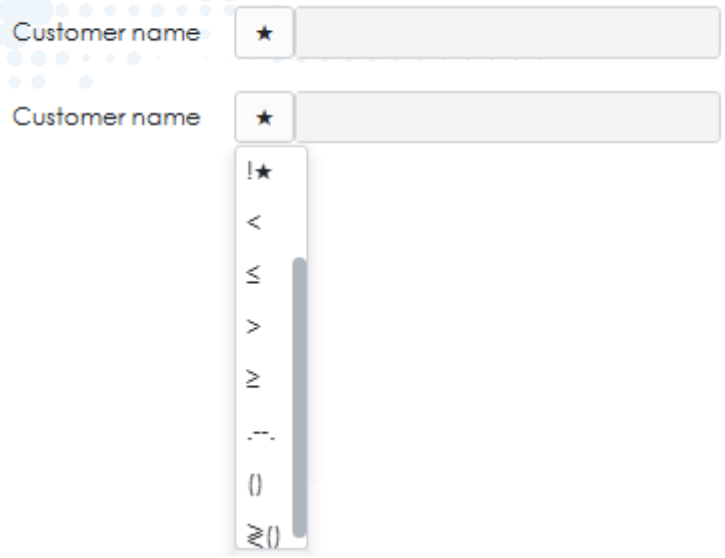
Hidden operators

The field is displayed without the operator drop-down option.

Customer name

Displayed operators

The field is displayed with the operator drop-down option.



Hitlist



This tab is only displayed after a ***Search***, ***Extended search*** or ***Info search*** has been executed.

These tabs are consecutively numbered, by default.

Note

When a search action has been performed, the tab ***Hitlist*** remains visible even if the area is changed via the Action bar.

Icon	Function
	Filtering
	Show group panel

Icon	Function
	View
	Edit
	Check-In
	Check-Out
	Undo Check-Out
	Save to local list

New document



After selecting ***New document*** from the ***Action bar***, the Action tab ***New document*** opens, directly in ***Edit*** mode.

Within this tab, new documents can be created and sent to the Efalia ECM via Check-in.

The required ***Cabinet*** and ***Document Type*** can be selected within the ***Title bar***, above.

The option ***Save to local list*** allows it also to save the document locally.

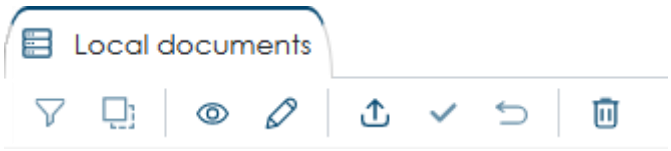
It is then available, also offline, in the ***Local Documents*** area on this computer for the logged-in user.

Icon	Function
	Save and move to next document
	Check-In
	First document
	Previous document
	Next document
	Last document
	Clear index fields
	Remove

Icon	Function
	Scan Batch
	Scan
	Scan Settings
	Available scan profiles
	Available Efalia ECM Forms*

* This drop-down menu is only visible if at least one Efalia ECM form is linked to the selected document type and the logged in user has corresponding permissions on this form.

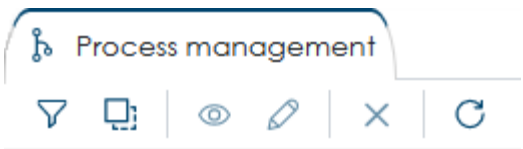
Local documents



After selecting ***Local documents*** from the ***Action bar***, the Action tab ***Local documents*** opens.

Icon	Function
	Filtering
	Show group panel
	View
	Edit
	Check-In
	Check-Out
	Undo Check-Out
	Remove

Process management



After selecting ***Process management*** from the ***Action bar***, the Action tab ***Process management*** opens.

Icon	Function
	Filtering
	Show group panel
	View
	Edit
	Remove
	Refresh

Document lists

Document lists are shown within the context specific tabs. There are three different lists.

Hitlist



The ***Hitlist*** contains all the results of a search in Efalia ECM. It is displayed after a search in a cabinet. In case a ***Hitlist*** is already displayed, the tab ***Hitlist*** is updated and the numbering within the tab is incremented by one, except when the tab was previously pinned.

When a ***Search*** is performed, it will only be performed on a single document type and the Hitlist contains only documents of that document type.

When an ***Extended search*** is performed, the search is run on all document types, available for the logged-in user. The ***Hitlist*** is sorted by document type. The list shows the name of the document types and in brackets, the number of hits within it.

It also shows the status for each document on the list. This provides a helpful overview whether a document is in use and checked-out by another user or editable.

The Hitlist can be sorted in several ways e.g. ascending or descending, depending on the values in a column. Just click on the column header and the list is sorted ascending depending on the values of the column you selected.

A double click with the left mouse button on an entry opens the document in a separate tab.

Icon	Function
	Filtering
	Show group panel
	View
	Edit
	Check-in
	Undo Check-out
	Save to local list

Full Text Search Results

After performing a full text search, the results will be displayed in a ***Hitlist***. Each record shown in the list refers to a specific page of a document. The location in the document is shown in the column ***On page***.

Additionally, a ranking in **%** is displayed for each page as to the relevance of the page in relation to the search performed.

Electronic format documents, such as Microsoft Word documents and PDF's are included in the search, however, when selecting a document to view, page 1 of the document will always be displayed.

Local documents



The list Local Documents, known from Efalia ECM WinClient, is in Efalia ECM WebClient located in the area ***Local Documents***, which can be selected via the Action bar on the left-hand side.

This list contains documents, created by the logged-in user on this system. These documents are either created by using option ***New document***, ***WebScan*** or ***Send to***.

Note

Documents, shown within the action tab New Documents are stored in the browser cache of the local system.

Process management



The corresponding action tab contains a list of all documents, sent by other users of Efalia ECM, an ad hoc process or through the BusinessProcessManagement, if the logged-in user is defined within a user action step.

Document viewer

The selected document is displayed within the viewer in the document tab.

All documents are converted into PDF format, for display purpose only.

Document Status

Each document on a document list has a defined status. The status shows whether a document is stored locally on a workstation or on the Efalia ECM server. If a document is being edited by another user, it is displayed with a ***read only*** status and cannot be edited by another user at that time.

New



New denotes that a document is hasn't ever been checked-in and uploaded to the Efalia ECM server. A document with a ***New*** status is only available on the client system it has been created on.

Archived



Archived denotes that a document is checked in to the Efalia ECM server.

A document with an ***Archived*** status is downloaded from the server if it is displayed on the search list.

Checked-out



Documents with a status of ***Checked-out*** are currently checked out by the logged-in Efalia ECM user.

These documents can be displayed, edited and afterwards checked back in.

Until then, they are only available to other users in Read only status.

Read only



Documents with a status of ***Read only*** are currently checked out by another Efalia ECM user. These documents can be displayed but cannot be checked out in order to be changed.

Note

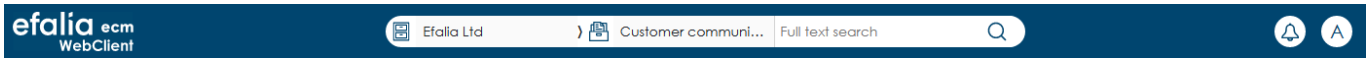
In certain circumstances, e.g. checked out documents are stored on a hard disk which is damaged, this status can be reset by an administrator by selecting **Undo Check-out** in Efalia ECM WinClient.

First Steps

Cabinets and Document Types

After the log-in, the Efalia ECM WebClient desktop is displayed, with the ***Action bar*** on the left hand side and the area ***Search*** selected, which also displays the ***Search*** tab.

The displayed ***Cabinet*** is shown in the ***Title bar***, followed by the selected ***Document type*** and the input field for the ***Full-text search***.



Switch Cabinets Manually

The preselected cabinet can be switched by clicking on the cabinet shown in the Title bar and choosing a cabinet from the displayed list.

Icon	Function
	List of available cabinets

Select Document Types

Also the preselected document type can be switched by clicking on the icon in the Title bar and choosing the required document type from the displayed list.

Icon	Function
	List of available document types

Action bar (Work Areas)



The ***Action bar*** is the main area of Efalia ECM WebClient.

The four areas ***Search***, ***New document***, ***Local documents*** and ***Process management*** provide the options to perfom the respective task in WebClient.

Search



The ***Search*** section contains the various options to search for documents within Efalia ECM - except for the ***Full text search***. This is located in the ***Title bar*** area.

Keep in mind that there is a limit on the server side that controls the maximum entries returned from the search result lists.

The default value here is ***1000*** entries.

Note

This default value can be changed by an administrator.

For further information, see the **Installation Guide**.

New document



The area ***New document*** provides all necessary options to create new documents using the WebClient application, this includes access to available scan profiles and Efalia ECM Forms via a drop-down menu.

Local documents



The area ***Local documents*** contains a list with all documents, stored locally on the client system, with a quick access to the view and edit functionalities.

Process management



The area ***Process management*** gives you access to work with your Efalia ECM documents, sent to you either by other Efalia ECM users or via the BusinessProcessManagement.

Keep in mind that there is a limit on the server side that controls the maximum entries returned from the search result lists.

The default value here is ***1000*** entries.

Note

This default value can be changed by an administrator.

For further information, see the **Installation Guide**.

Search

A search can be performed within a specified document type or over all document types of a cabinet that the logged-in user has rights to.

Documents can be searched for using the index data entered against each document, or by searching the content of the documents themselves by using full text search.

Note

For full text search, the OCR Server option is required, and must be configured to OCR the relevant Document Types.

Select Search from the ***Action bar*** on the left-hand side.

Now, the Action tab ***Search*** is displayed. To run a search in a specific document type, select the document type within the title bar.

The result is displayed in an additional tab, labelled ***Hitlist***.

Search/Extended Search

The Efalia ECM system provides to different search options.

Search



With this option, the search, based on given index values, is only run within the document type selected above.

Extended Search



This option performs the search, based on given index values, across all available document types within the selected cabinet.

Info Search



This option allows you to use additional, internal fields, which are connected with each Efalia ECM document, such as ***Created by***, ***Created on***, ***Archived on***, ***Modified by*** and ***Modified on***.

Full Text Search



Searching for documents by their content can be performed by selecting the ***Full text Search*** from the ***Title bar***. After entering the relevant word or phrase, the search can be either performed within the selected

Note

To be able to use **Full Text Search**, the documents must have had OCR performed on them on the Efalia ECM Server using the optional OCR Server module.

Document Type or across all Document Types the user has rights to.

In default, a full text search is only be performed within the selected document type.

Using the shortcut CTRL+ , the full text search will be performed within all available document types of the selected cabinet.

The default behaviour can be changed in the ***Settings*** of WebClient. The option ***Perform extended search by default*** will swap the behaviour of the full text search.

Use Search Parameter

The option ***Show operators*** allows you to toggle whether available operators for the fields are displayed or not.

In default, fields are displayed without the operator drop-down option visible.

Example

Hidden operators



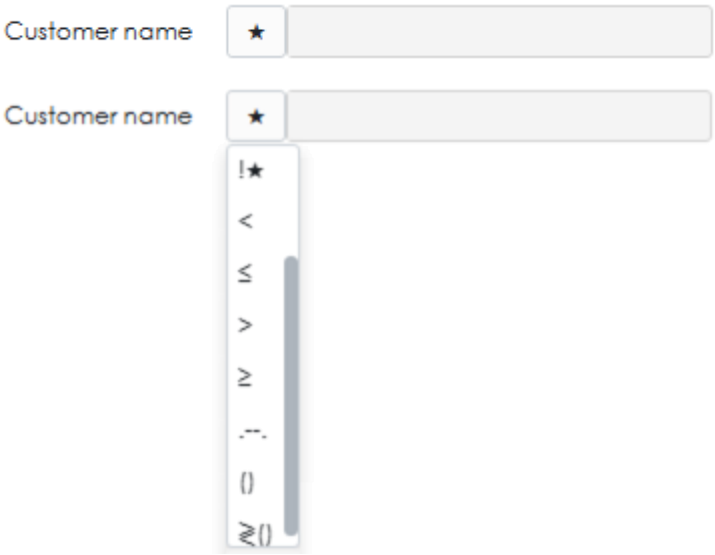
The field is displayed without the operator drop-down option.



Displayed operators



The field is displayed with the operator drop-down option.



When searching using index fields a search parameter can be selected for each field that specifies the search conditions.

Parameter	Description
★	Wildcard search
=	Exact match
≠	Not equal search
<	Smaller than value specified

Parameter	Description
≤	Smaller or equal value specified
>	Greater than value specified
≥	Greater or equal value specified
.--.	Range search With this option two values have to be specified, a lower and an upper limitation for the range.
()	Empty value search
≷()	Search for all documents with index field filled

Working with search results

The list of Search results (***Hitlist***) is displayed after a successful search operation on the server has been performed. . In case a ***Hitlist*** is already displayed, the tab ***Hitlist*** is updated and the numbering within the tab is incremented by one, except when the tab was previously pinned.

The Search Results can only be displayed when the WebClient is connected to the Efalia ECM server.

Keep in mind that there is a limit on the server side that controls the maximum entries returned from the search result lists.

The default value here is ***1000*** entries.

Note

This default value can be changed by an administrator.

For further information, see the **Installation Guide**.

Display of the hit list



The ***Hitlist*** contains all results of a search in Efalia ECM. It is displayed after a search in a cabinet. In case the list is already displayed, the tab ***Hitlist*** is updated and the numbering within the tab ***Hitlist*** is incremented by one, except when the tab was previously pinned.

Keep in mind that there is a limit on the server side that controls the maximum entries returned from the search result lists.

The default value here is ***1000*** entries.

Note

This default value can be changed by an administrator.

For further information, see the **Installation Guide**.

When a ***Search*** is performed, it will only be performed on a single document type and the hit list contains only documents of that document type.

When an ***Extended search*** is performed, the search is run on all document types, available for the logged-in user. The ***Hitlist*** is sorted by document type. The list shows the name of the document types and in brackets, the number of hits within it.

It also shows the status for each document on the list. This provides a helpful overview whether a document is in use and checked-out by another user or editable.

The hit list can be sorted in several ways. The hit list can be sorted ascending depending on the values in a column. Just click on the column header and the list is sorted ascending depending on the values of the column you selected.

A double click with the left mouse button on an entry opens the document in a separate tab.

Icon	Function
	Filtering
	Show group panel

Icon	Function
	View
	Edit
	Check-in
	Undo Check-out
	Save to local list

Create Documents

After selecting ***New Document*** from the ***Action bar***, the corresponding ***Action tab*** is displayed.

Firstly, the appropriate ***Cabinet*** and ***Document type*** must be selected in the ***Title bar***.

Now, the corresponding fields are displayed.

New documents can either be created by:

Drag & Drop/File Import Window



New files can be either added via ***Drag & Drop*** to the upload icon or click on the icon and select the file from the file system.

WebScan



Through ***WebScan***, new documents can be created by scanning with previously in Efalia ECM Enterprise Manager set up scan profiles. These scan profiles are listed in a drop-down menu on toolbar of the ***Action tab*** New documents.

Installation



WebScan is a ClickOnce solution and must be installed before first use by clicking the Scan Settings icon.

See also: Installing ClickOnce Solutions.

A notification window for the installation of ***WebScan*** opens and the installation must be confirmed.

Batch Scan



Using ***Batch Scan*** all pages in the feeder of a scanner are scanned and stored as one document in Efalia ECM.

To scan a multipage document:

1. Put the page or pages into the scanner feeder.
2. Select the preferred ***scan profile***.
3. Select ***Batch scan*** from the Action tab.

Single Page Scan



All documents in the feeder of a scanner are scanned and each page is stored as a single-page-document.

Example

1. Put the page or pages into the scanner feeder.
2. Select the preferred ***scan profile*** from the drop-down list.
3. Select ***Scan*** from the Action tab.

Scan Settings



Documents are scanned using scan profiles. The scan profiles are configured in Enterprise Manager by an Efalia ECM administrator. Scan profiles can be designed to provide the highest quality scan by setting the best scanner parameters for the documents to be scanned.

Which scanner settings can be configured in the scan profile, depends on the scanner and the driver being used. Settings such as resolution, single or double-sided scanning and colour or black & white scanning are available. A scan profile can also be set to automatically scan a defined number of pages into one document.

The scanner settings of a selected scan profile can be temporarily changed in WebScan, by clicking ***Scan settings***.

For example the brightness setting can be adjusted to the quality of the documents to be scanned.

The available settings depend on the scanner driver used.

Display/Viewer

A document can either be opened by a double click on the ***Hitlist*** or by selecting the document on the ***Hitlist*** and select the icon ***View***.

When a document is selected by a double click on the ***Hitlist***, the label of the tab is displayed according to the index value of the document, that was selected by double click.

Icon	Function
	View

Default

In default, the viewer displays one thumbnail per file on the left-hand side and the first page of the document.

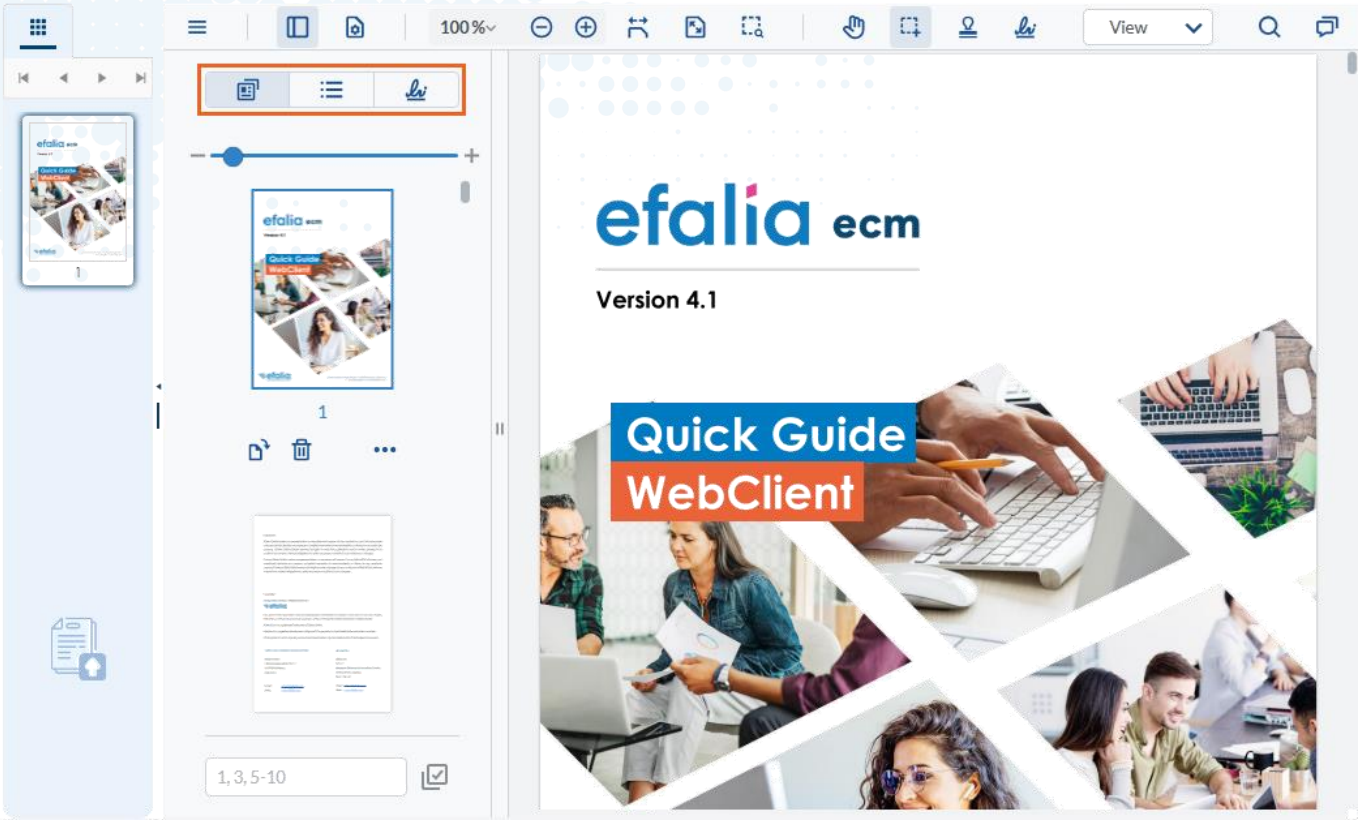
In case of a multipage document, use the mouse wheel to scroll through the pages of the selected file.



Extended Options/Panel



Selecting Panel offers additional display options such as ***Thumbnails***, ***Outlines*** and ***Signatures***.



Print

Print from Hitlist

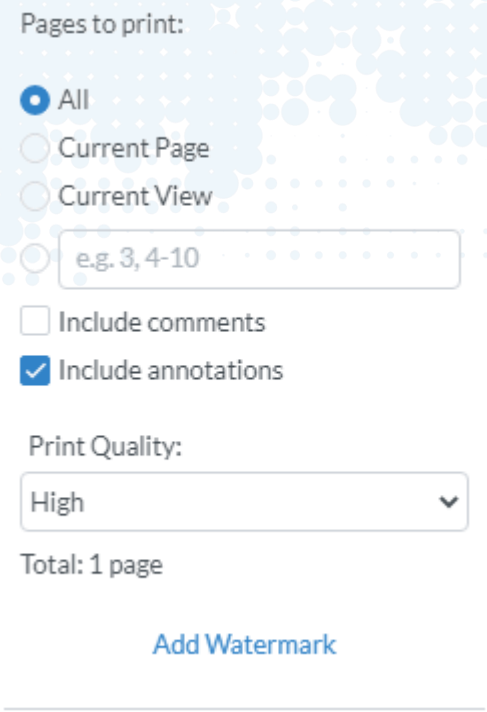
The ***Print*** function is located in the context menu of the right mouse button.

This option allows you to print the whole Efalia ECM without annotations, if any.

Print from Viewer (Menu)

The ***Print*** function is located in the menu of the PDF toolbar, in the respective tab of the displayed document.

Now you can select information to be printed.



Include comments

If the option ***Include comments*** is selected, the corresponding comments will be included as additional pages.

Include annotations

If the option ***Include annotations*** is selected, the corresponding annotations are included in the printing process.

Edit

Existing documents can be edited in many ways, depending on whether it is a document stored in a cabinet or a new document on the list Local documents.

Editing of documents will also depend upon the rights of the user.

Index information stored with a document can be added or edited at any time. The relevant user must have rights to modify documents.

Each change of a document which has been already checked in to a document type is stored as a revision after checking in, unless the document type has been configured to disable revisions.

Editing document index data

Firstly, the document to be edited must be selected from the ***Hitlist*** or the list ***Local documents*** and the edit mode must be selected.

It can either be selected directly from the ***Hitlist*** tab, after selecting the document on the ***Hitlist*** or from the document tab itself.

Icon	Function
	Edit

The editing of index data is done within the corresponding document tab, after selecting ***Edit***. Now, the index information for the current document is displayed.

As soon as editing of index values is started, the document is automatically checked out to prevent simultaneous editing by other users and the background colour of the respective field changes.

Example

Existing value



Edited value



Click on the Check-in icon to apply the changes.

Change Document Types

Firstly, the document to be edited must be selected from the ***Hitlist*** or the list ***Local documents*** and the edit mode must be selected.

To move a document to a different Document Type, select the corresponding document tab and then the new Document Type from the ***Title bar***. Now, the index fields relevant for the new Document Type are displayed and the ew index data can be entered into the fields or existing index data can be changed.

Click on the Check-in icon to apply the changes.

Add files to existing documents

Files can be added to any document in the Efalia ECM, except for documents that have ***Read Only*** status. These documents have been checked out for editing by another user and can only be edited after they have been checked back in.

Note

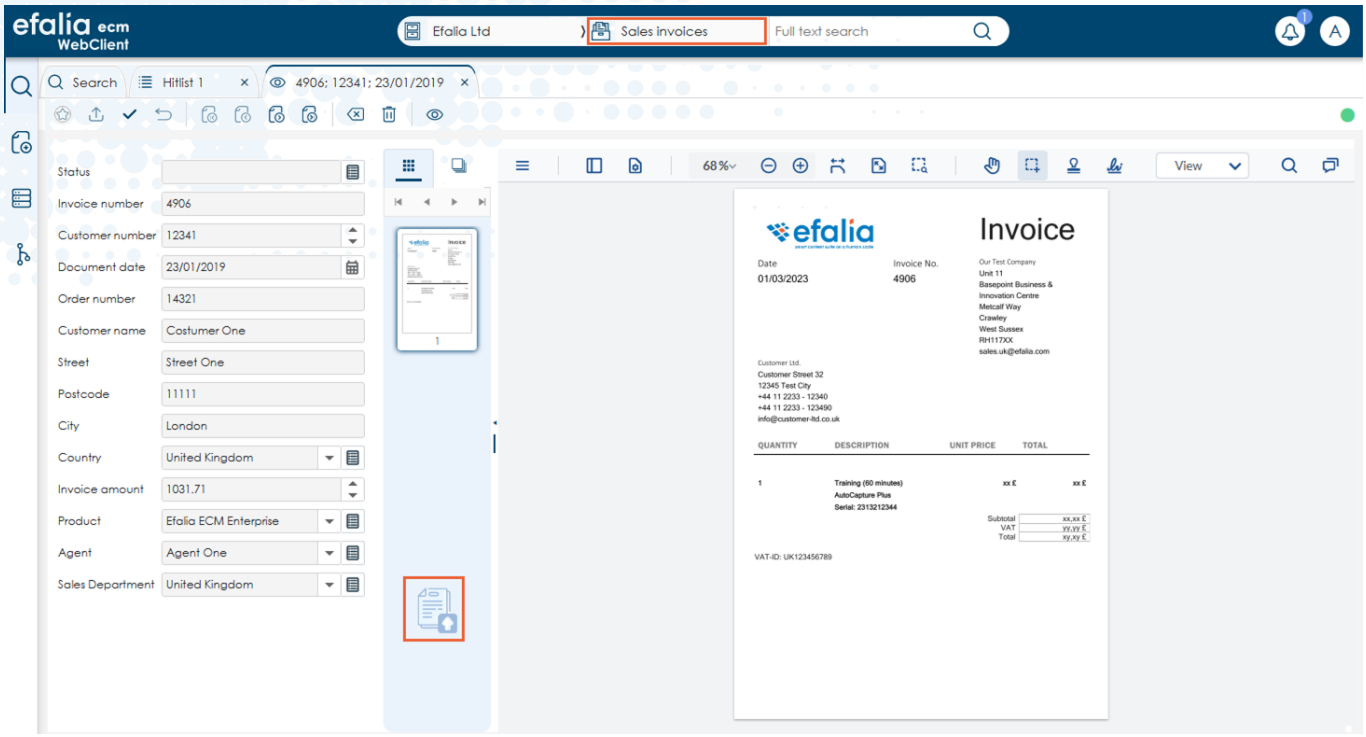
A prerequisite is that the logged in user has the appropriate permissions.

To add files to an existing document, you must first perform a ***Search***.

Then, either select the document on the hitlist and select ***Edit*** from the toolbar of the ***Hitlist*** action tab or open the document and select ***Edit*** from the toolbar of the document tab.

Hitlist Tab	Document Tab
	
Edit	***Edit***

After switching to the ***Edit*** mode, the display in the document tab is extended to include the fields for the document type, selected in the ***Title bar*** above, and the area for adding new pages or files to the respective document.



Now, just move the documents via ***Drag & Drop*** to the upload icon or click on the icon and select the file from the file system.

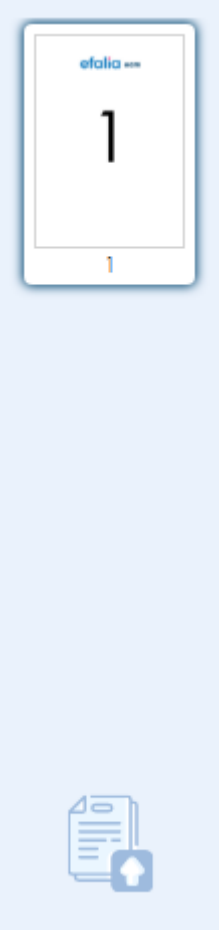
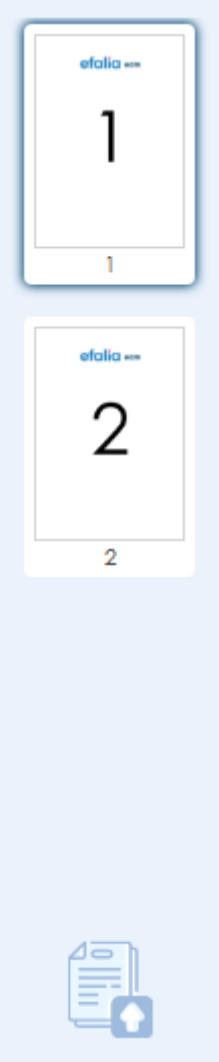
The new content is appended.

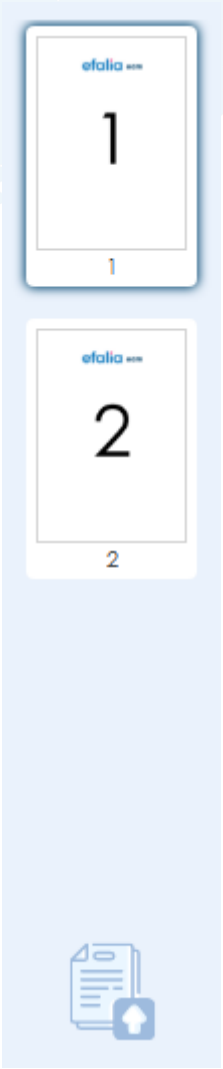
Note

Files can be inserted into any document in Efalia ECM, except for documents that have **Read only** status. These documents have been checked out for editing by another user and can only be edited after they have been checked back in.

Of course, the prerequisite is that the logged in user has the appropriate permissions.

Example

Before	After
	
The source document has one page.	A PDF document with one page has been added to the source document.

Before	After
	
The document now consists of 2 PDF files with one page each.	Another PDF document with one page has been added, with the thumbnail of file 2 previously selected.

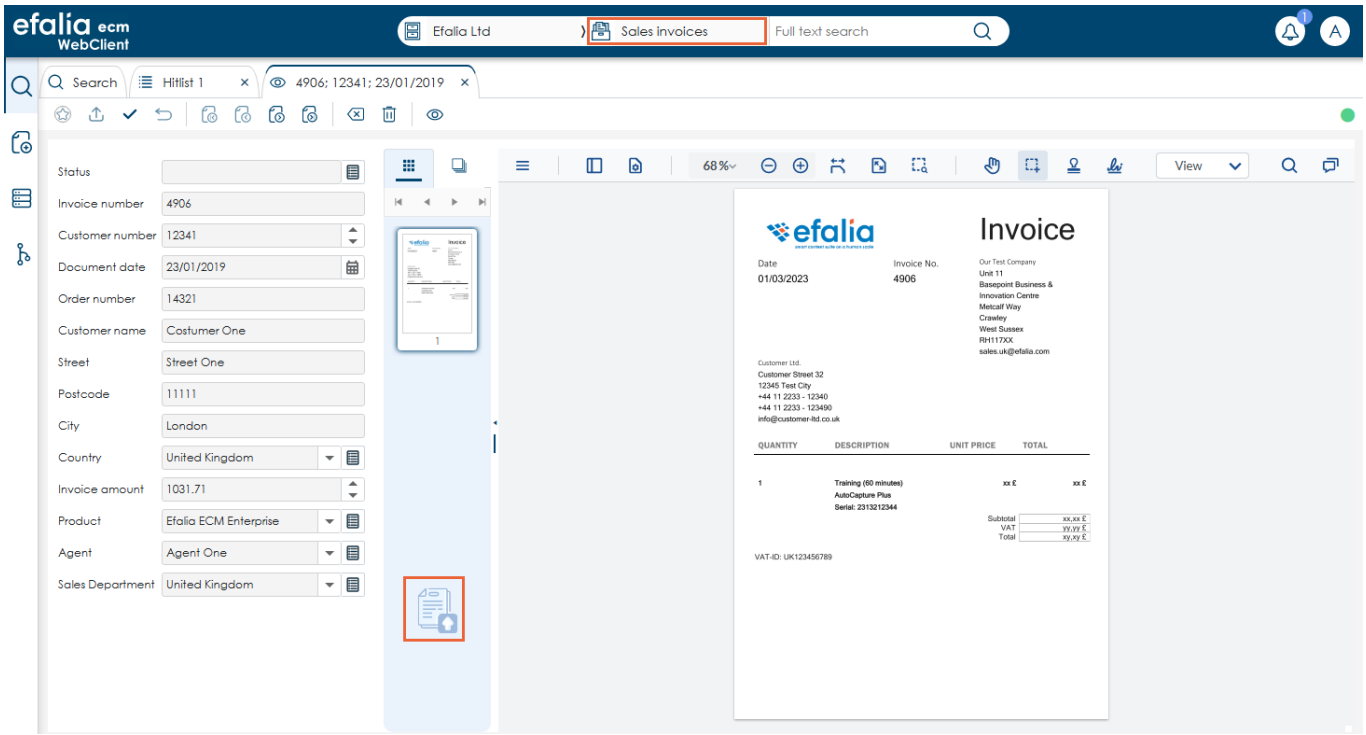
Insert files into existing documents

To be able to insert files in an existing document, you must first perform a ***Search*** and open the corresponding document.

Then, either select the document on the hitlist and select ***Edit*** from the toolbar of the ***Hitlist*** action tab or open the document and select ***Edit*** from the toolbar of the document tab.

Hitlist Tab	Document Tab
	
Edit	***Edit***

After switching to ***Edit*** mode, the display in the document tab is extended to include the fields for the document type, selected in the title bar above, and the area for adding new pages or files to the respective document.



To insert a file into a document, first select the page in the thumbnail above which the new content is to be inserted. Now, just move the documents via ***Drag & Drop*** to the upload area or click on the icon and select the file from the file system.

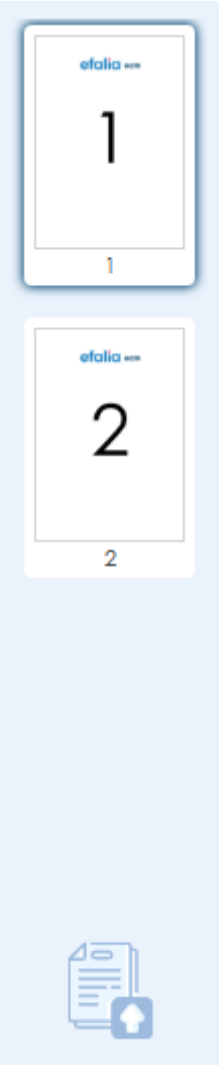
The new content is prepended, above the previously selected thumbnail.

Note

Files can be inserted into any document in Efalia ECM, except for documents that have **Read only** status. These documents have been checked out for editing by another user and can only be edited after they have been checked back in.

Of course, the prerequisite is that the logged in user has the appropriate permissions.

Example

Before	After
	
The document now consists of 2 PDF files with one page each.	Another PDF document with one page has been added, with the thumbnail of file 1 previously selected.

Annotations



The drop-down menu of the viewer's taskbar offers multiple options for editing the document itself e.g. ***Annotate***, ***Shapes*** and ***Forms***.

These options provide a variety of ways to highlight or hide information in a document

Send to

Local documents

Documents can be sent from a Hitlist to the list ***Local documents***.

A copy of these documents is then kept locally on the respective system for the logged-in user.

Process

Processes must have been configured for a document to be sent to one. Documents can be sent on a process manually or automatically.

Manual Sending

To send documents manually to processes:

1. Select the document to be sent
2. Right-click and select ***Send to…*** ⇨ ***Process***.
3. Select the process to be used. Which process should be used must be checked with the administrator who configures the processes to company requirements.
4. Add a comment, if required
5. Press ***Ok***

User



Select the document or documents to be sent in the document list, right click and select ***Send to*** ⇨ ***User***. The target user can then be selected. When sending, a comment can be added as a note for the recipient, which is displayed when the document is opened.

All tabs, except the main action tab can be closed by pressing the ✕, top right of the tab.

Closing Tabs

All tabs, except the main action tab can be closed by pressing the ✕, top right of the tab.