efalia ecm

Version 4.5

User Guide
WebClient 1.5



efalia
smart content suite on a human scale

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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.

Installation and Basics

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.

For detailed Microsoft Product and Services Lifecycle information also see:

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

Note

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

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.

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.

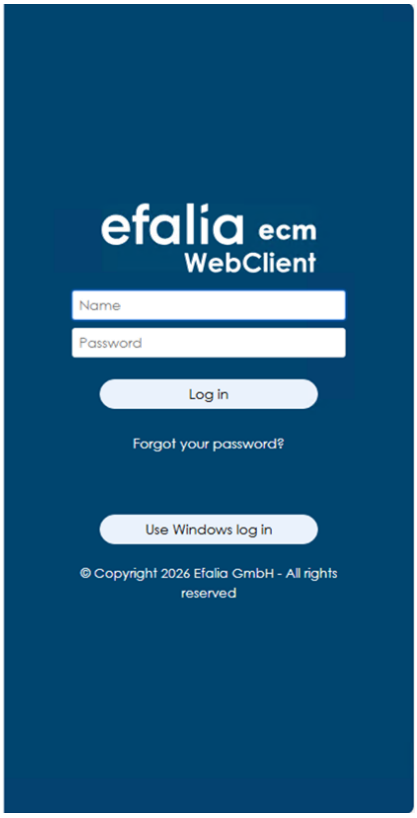
- The option ***Start application*** is not available.
- The option ***Absence settings*** is not available.
- The option ***Contacts*** is not available.
- The ***Document info***, is limited to the tab ***General***.

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

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.

ClickOnce Solutions

Efalia ECM uses ***ClickOnce*** solutions for some features.

These are run directly via the web browser.

Installing ClickOnce Solutions

Requirements

The following requirements must be met:

- Latest ***Microsoft .Net Framework 4.x*** or higher
- Additionally, ***Microsoft .Net Runtime 8.0*** or higher is required for ***WebClient Hub***

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.

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

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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WebClient Hub (Mail)

The ***WebClient Hub***, is required for the following features:

Feature	Link to the Description
Send to … Email	Send to...Email
Send to … Email (PDF)	Send to...Email (PDF)
Send to … Email as link	Send to...Email as link

Important

Additionally, **Microsoft .Net Runtime 8.0** or higher is required for WebClient Hub.

WebScan

WebScan is required for the following features:

- Scanning information into the Efalia ECM system

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.

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.

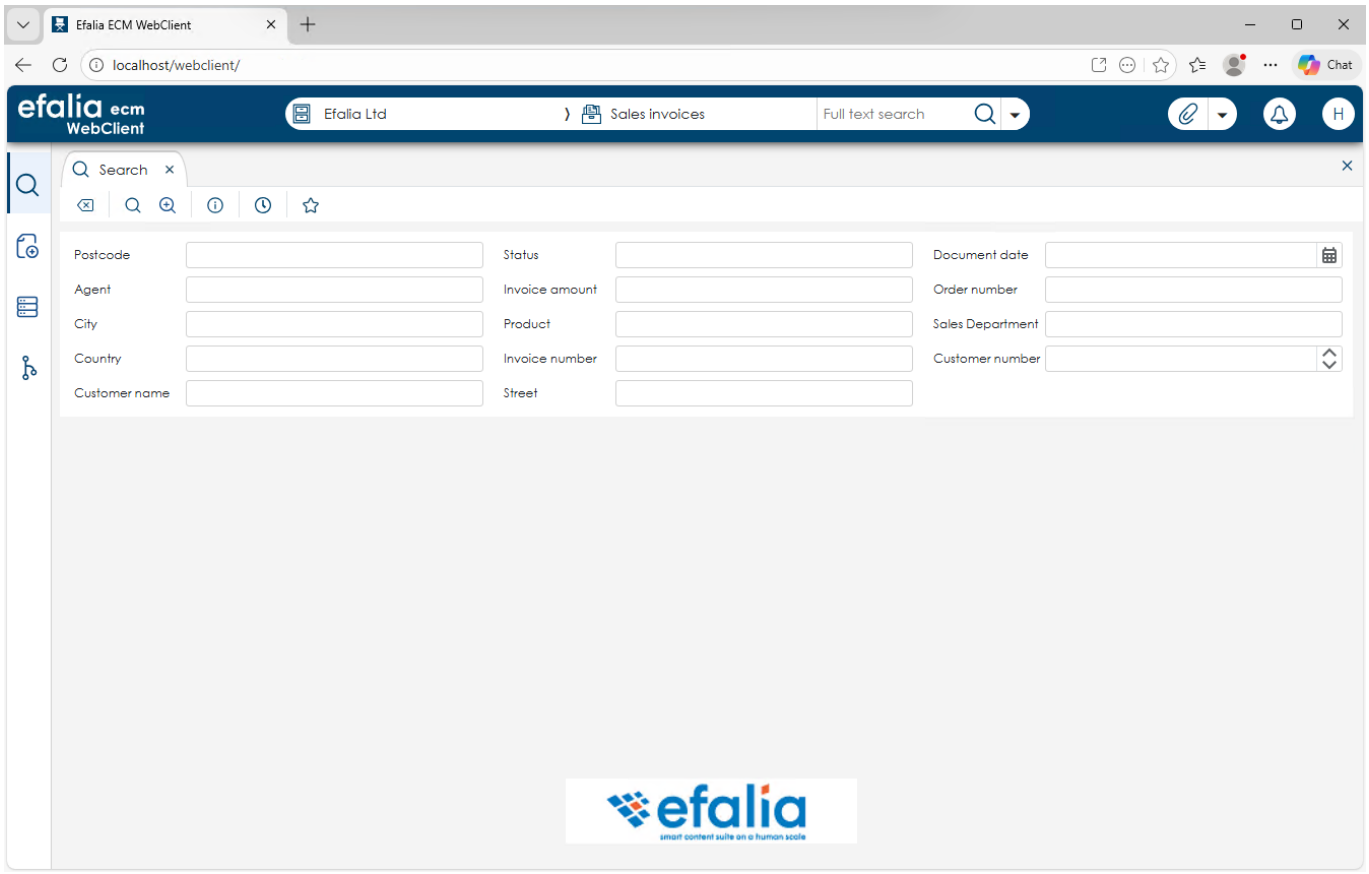
The WebClient Desktop

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

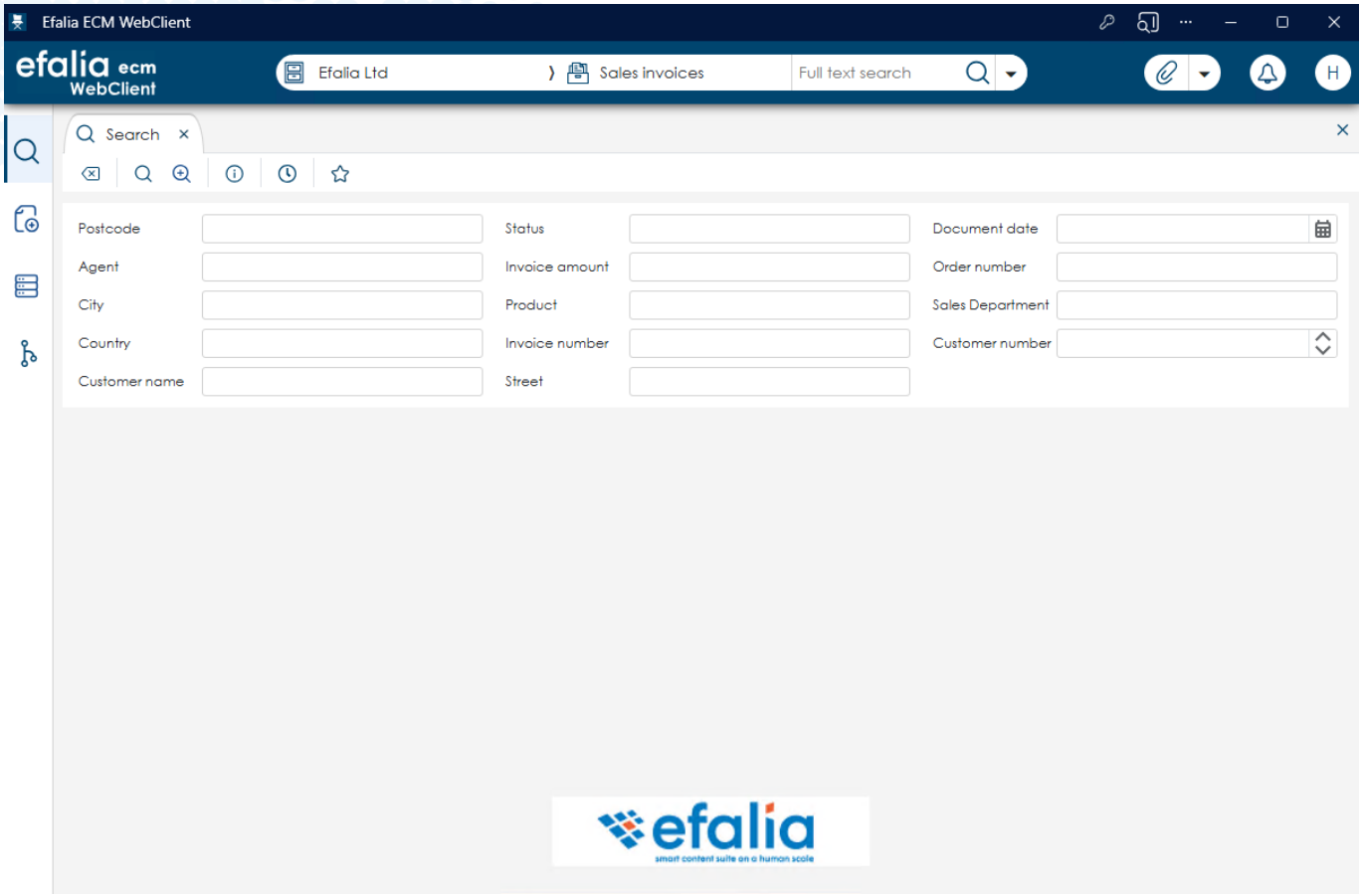
Both ways offer the same general layout.

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 without Field Views/Filing System Structure

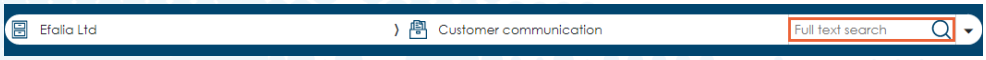


Cabinet and Document Type Selection



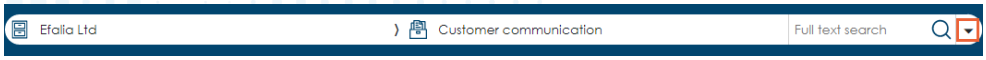
In the centre is the option for the cabinet and the document type.

Full Text Search



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

Search Profiles (Cabinets without Field Views/Filing System Structure)



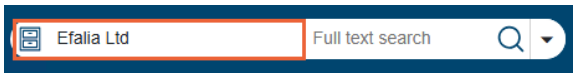
The last element in this section of the ***Title bar*** is the drop-down menu for ***Search profiles***.

Search profiles are defined and set up in the Efalia ECM Enterprise Manager.

Cabinet with Field Views



Selecting a Cabinet



Selecting a Document Type

The ***Document Types*** can be selected in the ***Extended Area***.

Also see: Extended Area.

Full Text Search (Cabinets with Field Views/Filing System Structure)



Search Profiles (Cabinets with Field Views/Filing System Structure)



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 account. The first letter of the user name is displayed as the initial.

In this example, the ***Administrator*** account was used to log in. Therefore, the button displays an ***A***.

The menu provides the sections ***Settings***, ***About*** and ***Log-out***.

Settings

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

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



Search

New Document

Local documents

Process management

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*** and ***Search profiles***. These are located in the ***Title bar***.

New document



The area ***New document*** provides all necessary options to create new documents using the Efalia ECM 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's browser, with a quick access to the view and edit functionalities.

The documents listed in the tab ***Local documents*** depend on the selected document type.

Also see: Local documents.

Process management

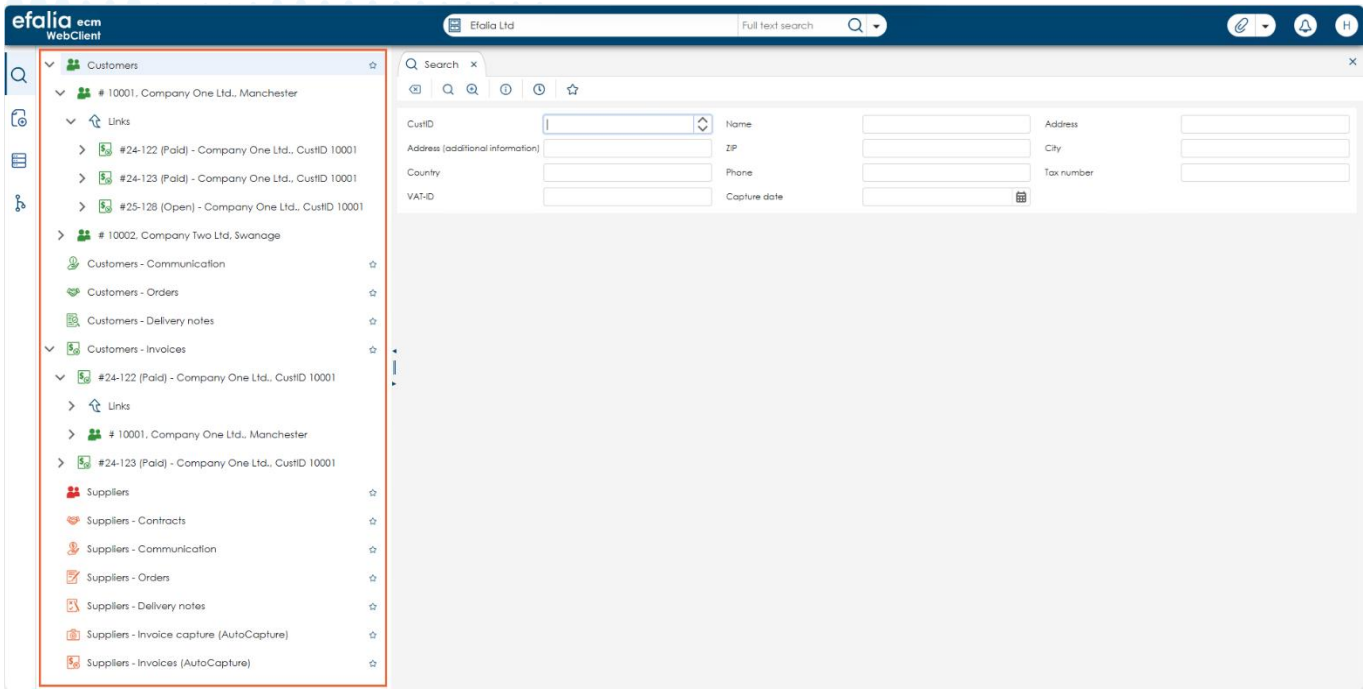


The area ***Process management*** gives you access to work with your Efalia ECM documents, sent to you either by other Efalia ECM users, via an ad hoc process or the BusinessProcessManagement.

Extended Area

The ***Extended Area***, its content and its visability depends on the general structure of the selected Efalia ECM Cabinet.

The area is used for cabinets that use either the ***Filing System*** or the ***Field view*** feature.



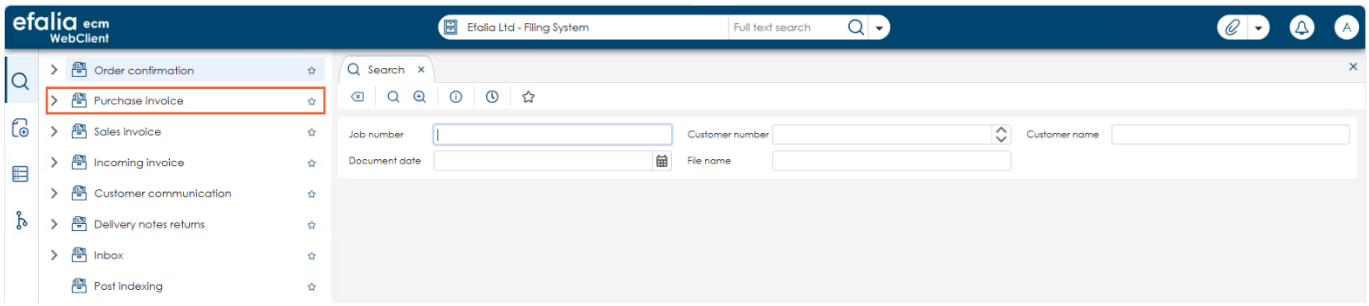
Filing System

When an Efalia ECM Cabinet with ***Filing System*** structure is selected, ***Extended Area*** shows the ***Document Types*** and the corresponding ***Filing System***.

Example

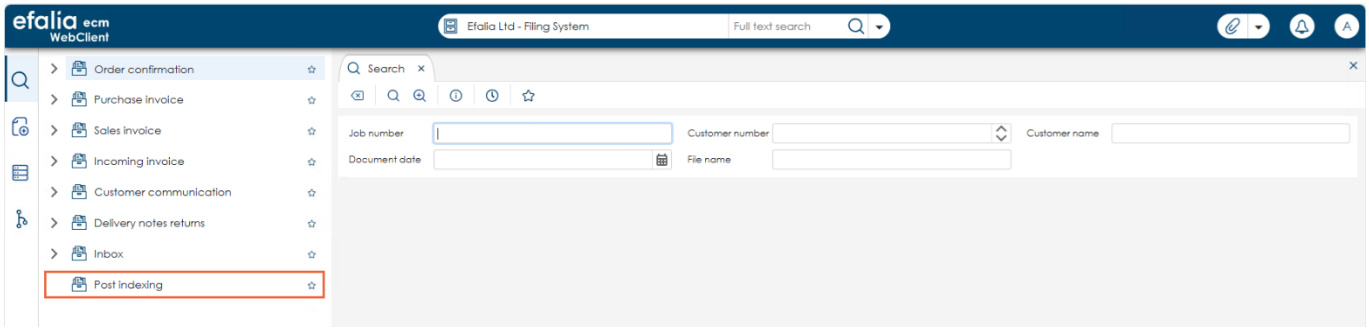
Document type with further levels

Document type with further levels are marked with › in front.



Example

Document type without further levels



If the selected document type does not have any further levels, it will be listed without the › in front.

Field Views

If an Efalia ECM Cabinet with ***Field views*** has been selected, the ***Extended Area*** displays the document types and, if field views have been defined for document types, the documents found after a search, according to the field view.

These documents can then be opened directly by double-clicking.

Favourites

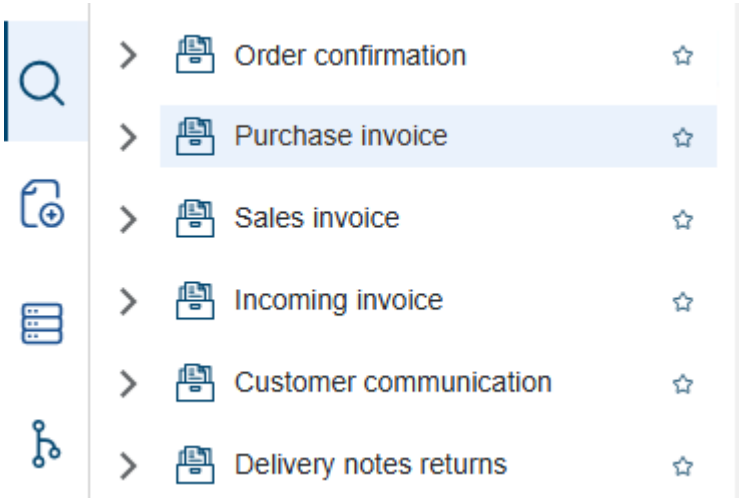


Working within a cabinet, built with the ***Filing System Designer***, allows you to mark ***Index Field Levels*** as ***Favourites***.

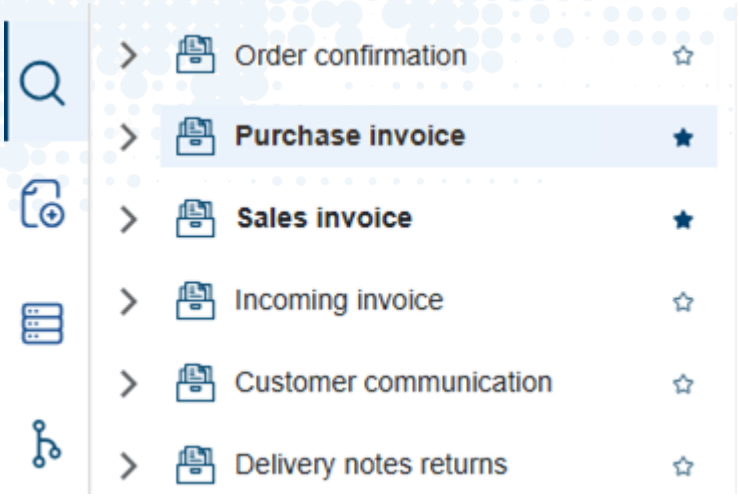
Levels that have been marked as ***Favourites*** are additionally highlighted in bold.

Example

No level is marked as ***Favourite***.



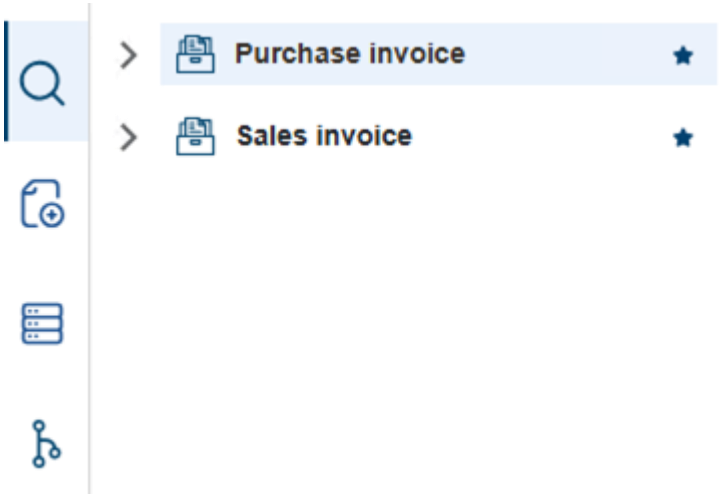
The levels ***Purchase invoice*** and ***Sales invoice*** have been marked as ***Favourite***.



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 levels ***Purchase invoice and Sales invoice*** are 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.

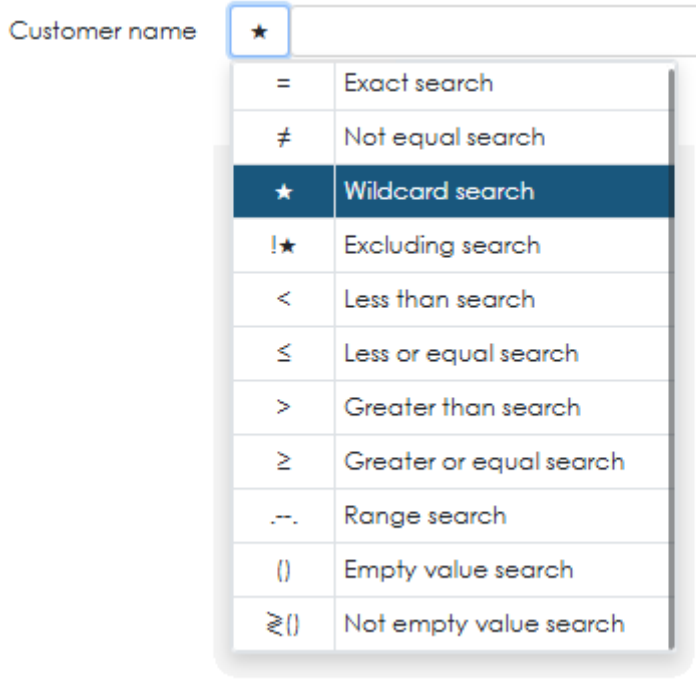


Displayed operators

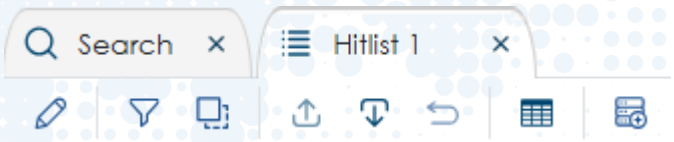
★

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





Hitlist



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

These tabs are consecutively numbered, by default.

Icon	Function
	Edit
	Filtering
	Show group panel
	Check-In
	Check-Out
	Undo Check-Out
	Export list
	Save to local list

Note

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

Context Menu: Right Mouse Button

Within the list of the respective area, further functions are available via the context menu of the right mouse button.

For more information see: Context Menu: Search (Hitlist)

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.

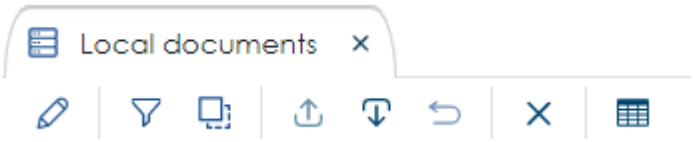
Icon	Function
	Save and move to next document
	Check-In
	Check-Out
	Undo Check-Out
	First document
	Previous document
	Next document
	Last document
	Clear index fields
	Remove
	Scan Batch*
	Scan*
	Scan Settings*

Icon	Function
(Default)	Extended Scan Options
	Available scan profiles*
	Available Efalia ECM Forms**

* This element is only visible if at least one Efalia ECM Scan Profile is setup for the corresponding cabinet and the logged-in account has access to it.

** 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.

The documents listed in the tab ***Local documents*** depend on the selected document type.

Also see: Local documents.

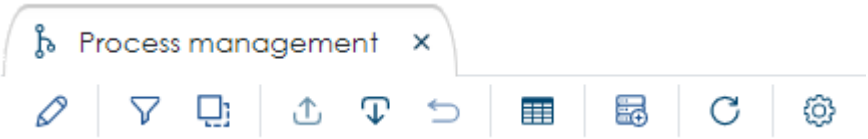
Icon	Function
	Edit
	Filtering
	Show group panel
	Check-In
	Check-Out
	Undo Check-Out
	Remove
	Export list

Context Menu: Right Click

Within the list of the respective area, further functions are available via the context menu of the right mouse button.

For more information see: Context Menu: Local Documents

Process management



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

Icon	Function
	Edit
	Filtering
	Show group panel
	Check-In
	Check-Out
	Undo Check-Out
	Export list
	Save to local list
	Process status

Context Menu: Right Click

Within the list of the respective area, further functions are available via the context menu of the right mouse button.

For more information see: Context Menu: Process Management

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***, ***Extended Search***, ***Info Search*** and ***Full Text 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.

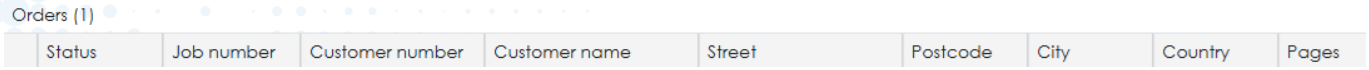
It also shows the status for each document on the list. This provides a helpful overview whether a document is in use and checked-out by another user or editable.

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

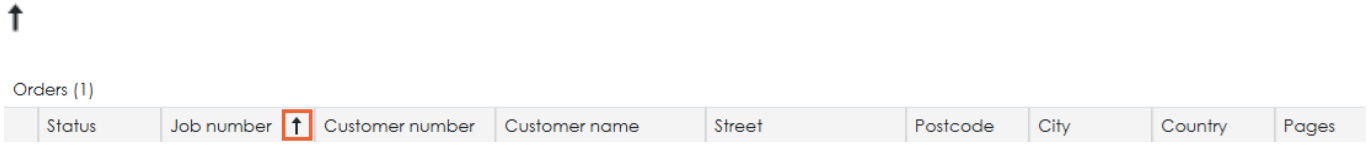
Icon	Function
	Edit
	Filtering
	Show group panel
	Check-in
	Check-out
	Undo Check-out
	Export list
	Save to local list

Sorting the Hitlist

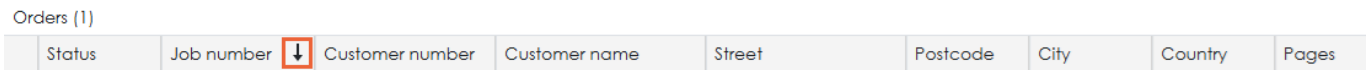
The Hitlist can be sorted in several ways e.g. ascending or descending, depending on the values in a column. Just click on the column header and the list is sorted ascending depending on the values of the column you selected.



Ascending



Descending



Cancel Sorting

The sorting can be cancelled again with ***CTRL + left mouse button***.

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 of local documents is in Efalia ECM WebClient located in the area ***Local Documents***, which can be selected via the ***Action bar*** on the left-hand side.

Note

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

This list contains documents, added by the logged-in user in the browser. These documents are either added to the list by using option ***New document***, ***WebScan***, ***Send to***. or ***Duplicate document***.

The status of the document added to the list depends on the action.

Action	Status on Local Documents List
Drag&Drop	New (*)
WebScan	New (*)
Send to…Local documents	Variable (Status of the source document)
Duplicate document	New (*)

Displayed Documents

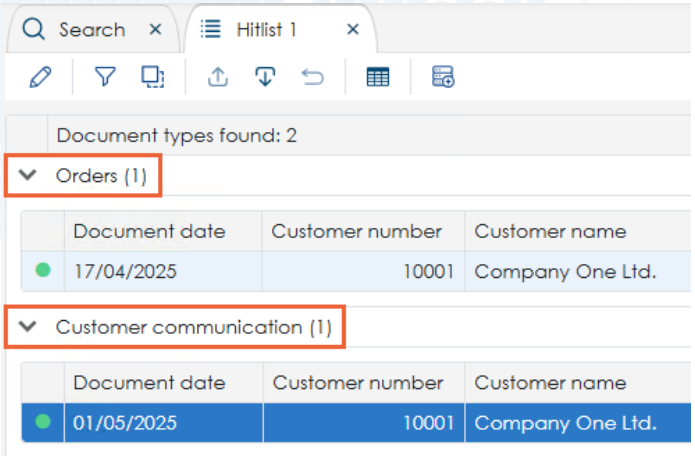
The content displayed in the tab ***Local documents*** is directly connected to the selected document type.

Depending on the structure of the Efalia ECM cabinet, the document type is either selected in the ***Title bar*** or the ***Extended area***.

Example

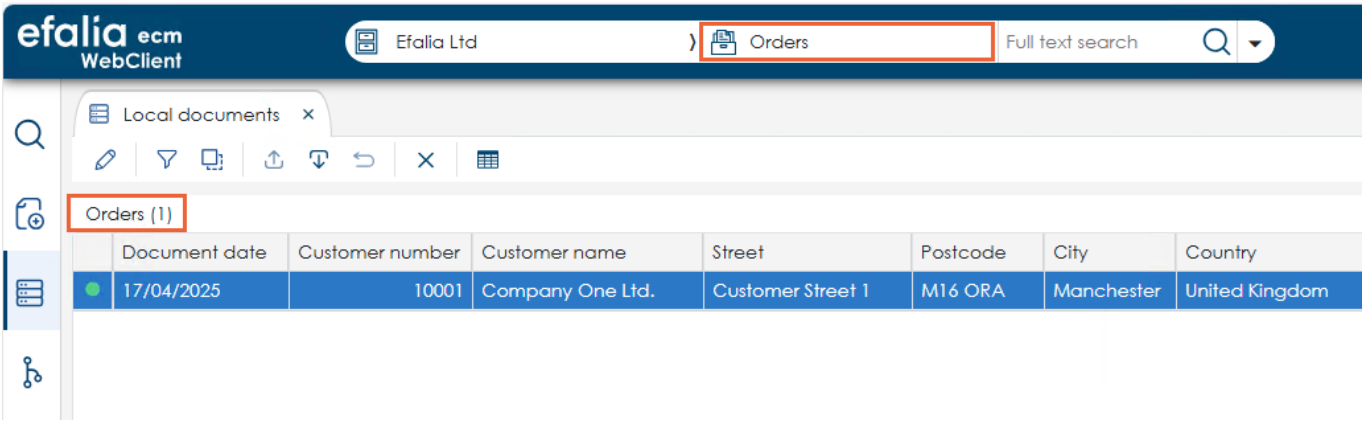
In this example, the two document from the ***Hitlist*** are ***Sent to…Local documents***.

One document is stored in the document type ***Orders*** and the other is stored in the document type ***Customer communication***.

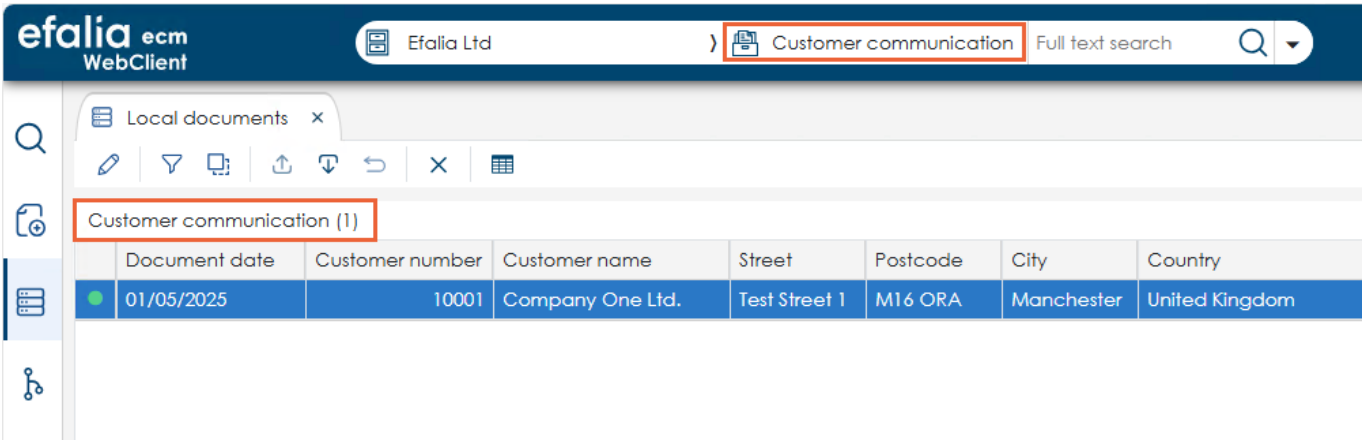


In the next image, the document type ***Orders*** is selected in the ***Extended area*** of the Efalia ECM WebClient.

The tab ***Local documents*** does only list the document of the selected document type but not the other document that was also ***Sent to***... ***Local documents***, previously.



The last image shows that after switching to the document type ***Customer communication*** in the Extended are of the Efalia ECM WebClient, now the other document is listed in the tab ***Local documents*** but not the one that is stored in the document type ***Orders***.



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.

Context Menus: Right Mouse Button

Search (Hitlist)

Document Info



This allows quick access to the history of the selected document.

See also: Document Information

View



This retrieves a document for viewing and displays it in a separate tab.

Edit



This retrieves a document for *editing* and displays it in a separate tab.

Move documents



Documents can be moved to other document types of a ***Standard structure*** or levels of a ***Filing System structure*** using the right-click context menu.

Example

Standard

To do this, select the document in the ***Hitlist***.

Then, select the relevant target document type in the ***Title bar*** and right-click on the document, selecting the ***Move document*** to the new document type option.

The document is automatically checked out and must be checked in under ***Local Documents***.

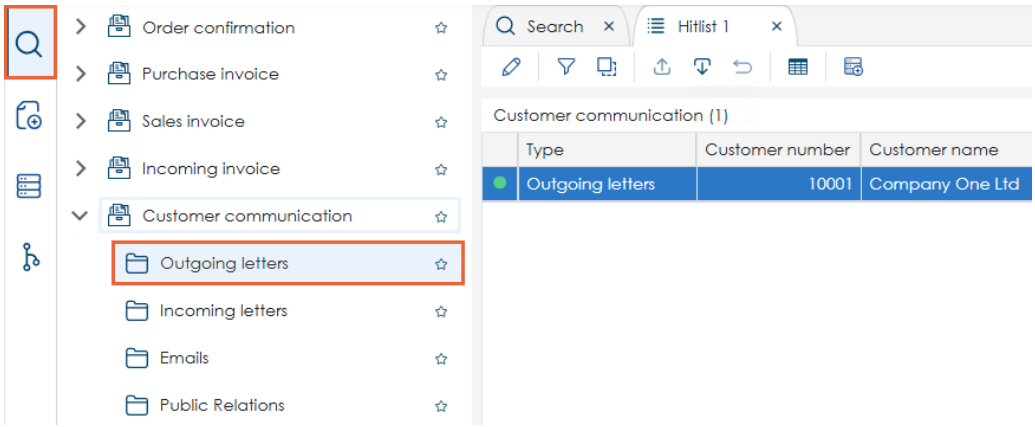
The document is checked in into the target document type.

Example

Filing System

In this example, a document stored in the document type ***Customer communication*** is moved from the level ***Outgoing letters*** level to the level ***Emails***.

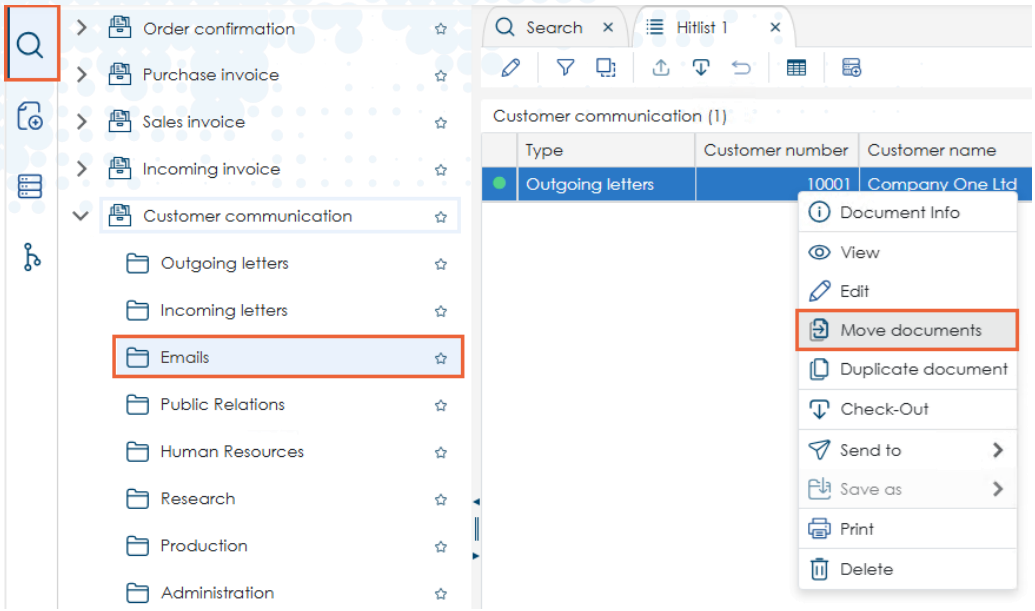
To do this, the ***Customer communication*** document type is expanded in the ***Extended Area*** and a search is performed on the level ***Outgoing letters***, in the area ***Search***.



Now, the level ***Emails*** is selected in the ***Extended Area***.

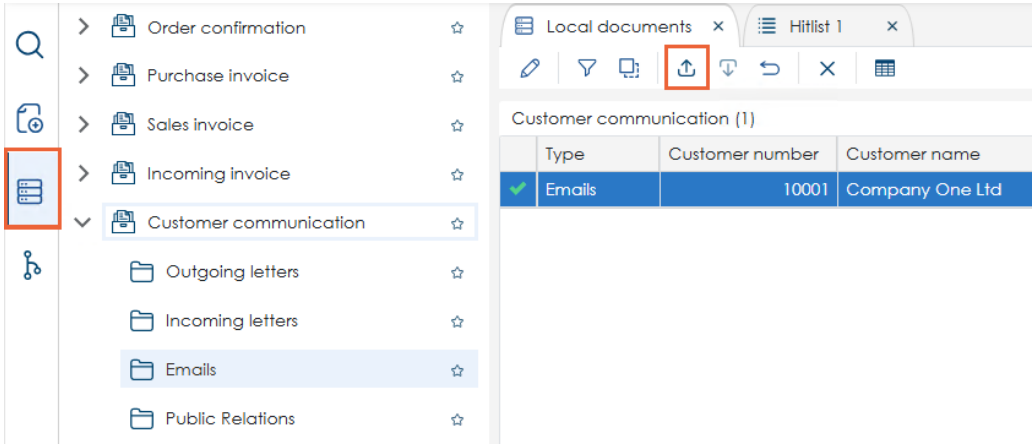
Then, from the ***Hitlist***, the document that is to be moved with a right-click.

The option ***Move document*** moves the document to the level ***Emails***.



The document is also automatically ***checked-out*** and added to the area ***Local documents***.

Selecting ***Check-in*** from the ***Toolbar*** of the area ***Local documents*** uploads the document with the updated information.



Duplicate document



Creates a duplicate of the selected document.

The duplicate is created in the ***Local Documents*** area. The document status is ***New*** (*).

Check-in (Visibility depends on Document Status)



This checks in a document.

This option is only visible when right-clicking on a document on the ***Hitlist*** that is either in the in the status ***Checked-out*** (✔).

Note

Depending on the respective **General Settings**, the function **Check in** may not remove the relevant document from the list **Local documents**.

Check-out (Visibility depends on Document Status)



This checks out a document from the server and lists it in the list ***Local documents***.

This option is only visible when right-clicking on a document that is in the status ***Checked-in*** (●).

Checked-out documents cannot be modified by other accounts. However, the latest revision stored on the server can be viewed by other accounts.

Undo Check-Out (Visibility depends on Document Status)



This option is only visible when right-clicking on a document that is in the status ***Checked-out*** (✔).

Note

The function **Undo Check-out** does not remove the respective document from the list **Local documents**.

Send to



The ***Send to*** option allows you to send documents to different destinations.

The following options are available:

Icon	Function	Link to the Description
	Local documents	Send to...Local documents
	Process	Send to...Process
	User	Send to...User
	Email	Send to...Email
	Email (PDF)	Send to...Email (PDF)
	Email as link	Send to...Email as link

Save as



Saves one or multiple selected documents into the selected format.

Please also note the information in the respective function description.

Icon	Function	Link to the Description
	Original	Save as...Original
	PDF	Save as...PDF
	ZIP	Save as...ZIP

Note

The option **Original** is only available if a single document is selected and this document does not consist of multiple files.

Print



This allows you to select a document for printing directly from the ***Hitlist***.

Delete



This allows you to delete the selected document(s).

This causes the document to be ***marked as deleted*** on the server.

Documents that are ***marked as deleted*** on the server will no longer appear in the Hitlist after a standard or extended search.

Local Documents

Document Info



This allows quick access to the history of the selected document.

See also: Document Information

View



This retrieves a document for viewing and displays it in a separate tab.

Edit



This retrieves a document for *editing* and displays it in a separate tab.

Move documents



Documents can be moved to other document types of a ***Standard structure*** or levels of a ***Filing System structure*** using the right-click context menu.

Example

Standard

To do this, select the document in the ***Hitlist***.

Then, select the relevant target document type in the ***Title bar*** and right-click on the document, selecting the ***Move document*** to the new document type option.

The document is automatically checked out and must be checked in under ***Local Documents***.

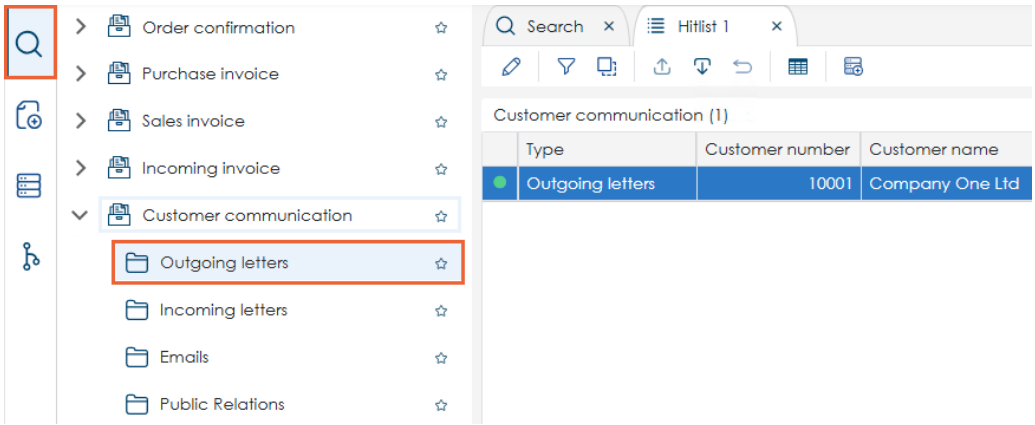
The document is checked in into the target document type.

Example

Filing System

In this example, a document stored in the document type ***Customer communication*** is moved from the level ***Outgoing letters*** level to the level ***Emails***.

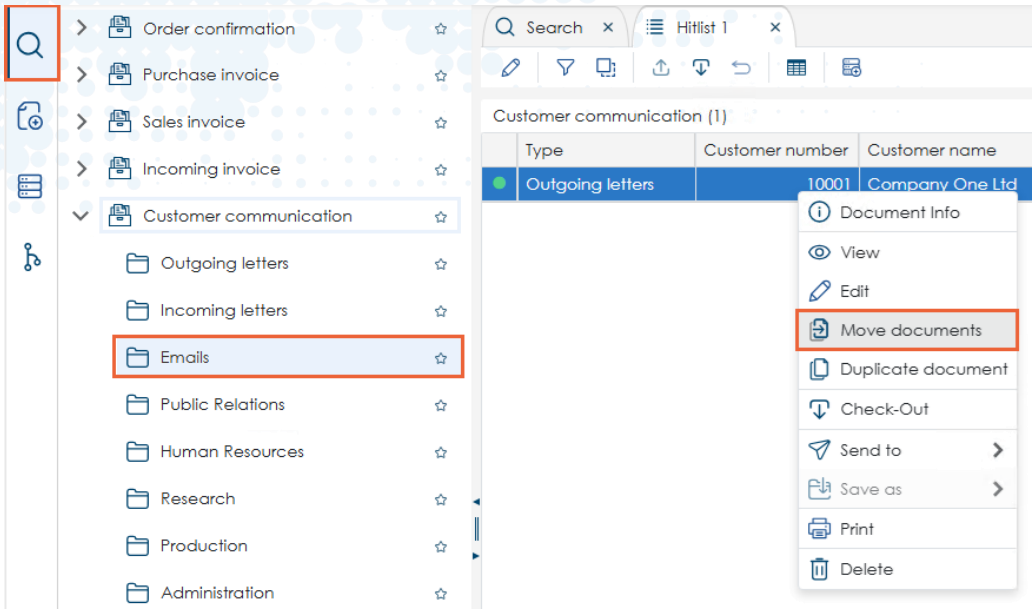
To do this, the ***Customer communication*** document type is expanded in the ***Extended Area*** and a search is performed on the level ***Outgoing letters***, in the area ***Search***.



Now, the level ***Emails*** is selected in the ***Extended Area***.

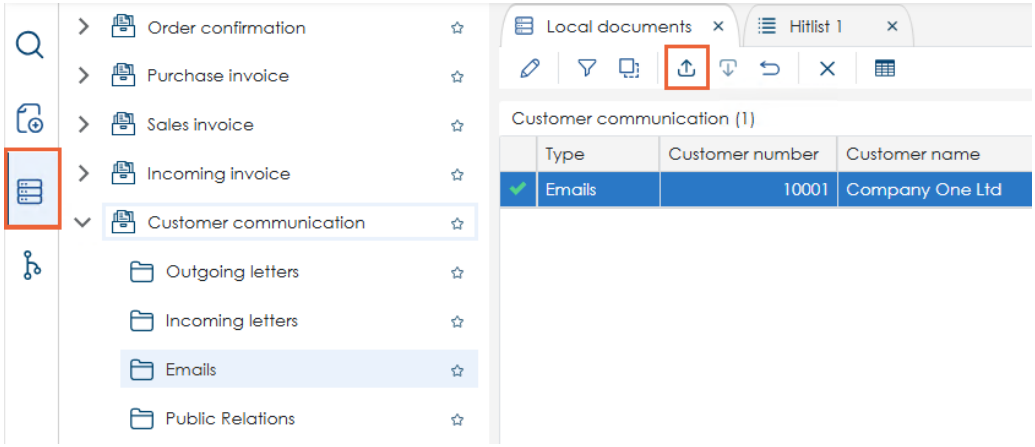
Then, from the ***Hitlist***, the document that is to be moved with a right-click.

The option ***Move document*** moves the document to the level ***Emails***.



The document is also automatically ***checked-out*** and added to the area ***Local documents***.

Selecting ***Check-in*** from the ***Toolbar*** of the area ***Local documents*** uploads the document with the updated information.



Duplicate document



Creates a duplicate of the selected document.

The duplicate is created in the ***Local Documents*** area. The document status is ***New*** (✳).

Check-in (Visibility depends on Document Status)



This checks in a document.

This option is only visible when right-clicking on a document on the ***Hitlist*** that is either in the in the status ***Checked-out*** (✔).

Note

Depending on the respective **General Settings**, the function **Check in** does not remove the relevant document from the list **Local documents**.

Check-out (Visibility depends on Document Status)



This checks out a document from the server and lists it in the list ***Local documents***.

This option is only visible when right-clicking on a document that is in the status ***Checked-in*** (●).

Checked-out documents cannot be modified by other accounts. However, the latest revision stored on the server can be viewed by other accounts.

Undo Check-Out (Visibility depends on Document Status)



This option is only visible when right-clicking on a document that is in the status ***Checked-out*** (✔).

Send to



The ***Send to*** option allows you to send documents to different destinations.

The following options are available:

Icon	Function	Link to the Description
	Local documents	Send to...Local documents
	Process	Send to...Process

Icon	Function	Link to the Description
	User	Send to...User
	Email	Send to...Email
	Email (PDF)	Send to...Email (PDF)
	Email as link	Send to...Email as link

Save as



Saves one or multiple selected documents into the selected format.

Please also note the information in the respective function description.

Icon	Function	Link to the Description
	Original	Save as...Original
	PDF	Save as...PDF
	ZIP	Save as...ZIP

Note

The option **Original** is only available if a single document is selected and this document does not consist of multiple files.

Print



This allows you to select a document for printing directly from the ***Hitlist***.

Remove



This allows you to remove the selected document(s) from the list ***Local documents***.

This action does not delete the document from the Efalia ECM System.

Process Management

Document Info



This allows quick access to the history of the selected document.

See also: Document Information

View



This retrieves a document for viewing and displays it in a separate tab.

Edit



This retrieves a document for *editing* and displays it in a separate tab.

Move documents



Documents can be moved to other document types of a ***Standard structure*** or levels of a ***Filing System structure*** using the right-click context menu.

Example

Standard

To do this, select the document in the ***Hitlist***.

Then, select the relevant target document type in the ***Title bar*** and right-click on the document, selecting the ***Move document*** to the new document type option.

The document is automatically checked out and must be checked in under ***Local Documents***.

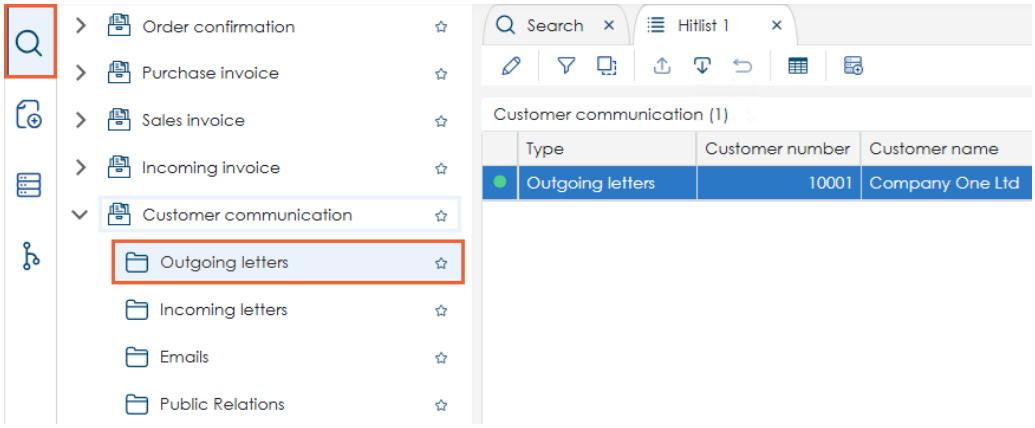
The document is checked in into the target document type.

Example

Filing System

In this example, a document stored in the document type ***Customer communication*** is moved from the level ***Outgoing letters*** level to the level ***Emails***.

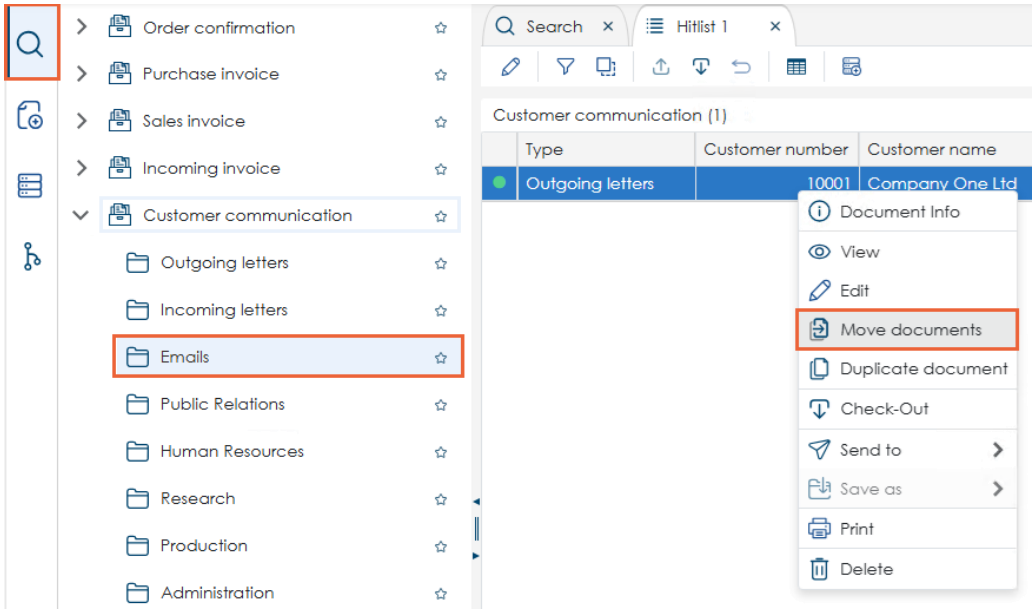
To do this, the ***Customer communication*** document type is expanded in the ***Extended Area*** and a search is performed on the level ***Outgoing letters***, in the area ***Search***.



Now, the level ***Emails*** is selected in the ***Extended Area***.

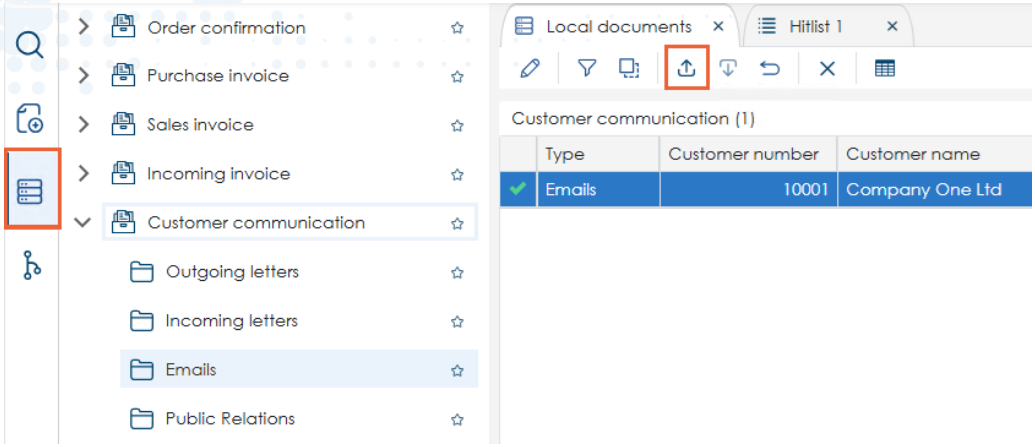
Then, from the ***Hitlist***, the document that is to be moved with a right-click.

The option ***Move document*** moves the document to the level ***Emails***.



The document is also automatically ***checked-out*** and added to the area ***Local documents***.

Selecting ***Check-in*** from the ***Toolbar*** of the area ***Local documents*** uploads the document with the updated information.



Duplicate document



Creates a duplicate of the selected document.

The duplicate is created in the ***Local Documents*** area. The document status is ***New*** (✳).

Check-in (Visibility depends on Document Status)



This checks in a document.

This option is only visible when right-clicking on a document on the ***Hitlist*** that is either in the in the status ***Checked-out*** (✔).

Note

Depending on the respective **General Settings**, the function **Check in** does not remove the relevant document from the list **Local documents**.

Check-out (Visibility depends on Document Status)



This checks out a document from the server and lists it in the list ***Local documents***.

This option is only visible when right-clicking on a document that is in the status ***Checked-in*** ().

Checked-out documents cannot be modified by other accounts. However, the latest revision stored on the server can be viewed by other accounts.

Undo Check-Out (Visibility depends on Document Status)



This option is only visible when right-clicking on a document that is in the status ***Checked-out*** ().

Send to



The ***Send to*** option allows you to send documents to different destinations.

The following options are available:

Icon	Function	Link to the Description
	Local documents	Send to...Local documents
	Process	Send to...Process
	User	Send to...User
	Email	Send to...Email
	Email (PDF)	Send to...Email (PDF)
	Email as link	Send to...Email as link

Save as



Saves one or multiple selected documents into the selected format.

Please also note the information in the respective function description.

Icon	Function	Link to the Description
	Original	Save as...Original
	PDF	Save as...PDF
	ZIP	Save as...ZIP

Note

The option **Original** is only available if a single document is selected and this document does not consist of multiple files.

Print



This allows you to select a document for printing directly from the ***Hitlist***.

Delete



This allows you to delete the selected document(s).

This causes the document to be ***marked as deleted*** on the server.

Documents that are ***marked as deleted*** on the server will no longer appear in the Hitlist after a standard or extended search.

Mark as red



New documents or documents that have not yet been viewed are displayed in bold on the list in the area ***Process management***.

These documents can be marked as read here.

This option does not affect the processing of a user step for a document within the Efalia ECM BusinessProcessManagement.

Mark as unread



New documents or documents that have not yet been viewed are displayed in bold on the list in the area ***Process management***.

These documents can be marked as unread here.

This option does not affect the processing of a user step for a document within the Efalia ECM BusinessProcessManagement.

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.

This is done for display purposes only. The original file is not modified.

Tabs

Pin/Unpin Tabs



Hitlist tabs and ***Document*** tabs can be pinned. Pinned tabs are not reused.

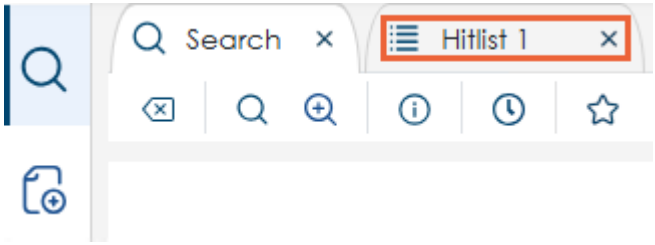
For example, when running another ***Search*** or ***Extended search*** or to display another document, the pinned tab is kept and another tab is used to display the new search results or another document.

If a tab is pinned, the name of the tab is displayed in bold letters.

Example

Unpinned Tab

In this example, the tab ***Hitlist*** will be reused when running another search.

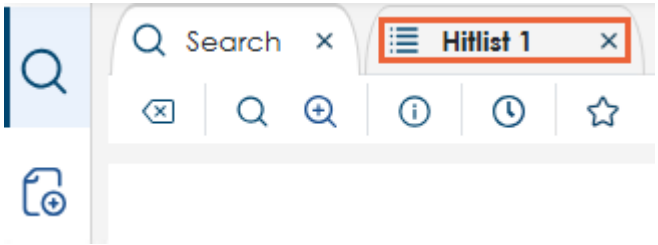


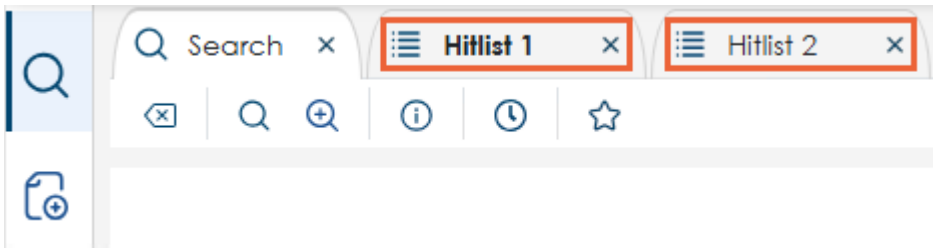
Example

Pinned Tab

In this example, the pinned tab ***Hitlist 1*** won't be reused when running another search.

Instead, another tab will open, labelled ***Hitlist 2***.





Closing Tabs

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

First Steps

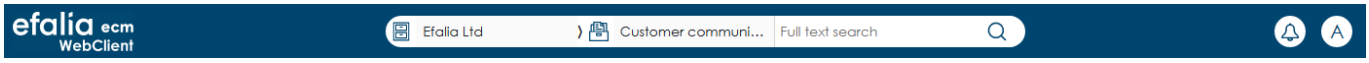
Cabinets and Document Types

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.

Depending on the structure of the cabinet, the elements displayed in the ***Title bar*** vary.

Standard Structure

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



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

Filing System Structure/Structure with Field Views

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



Switch Cabinets

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

For cabinets with a Filing system structure or with Field views, the document type is selected via the ***Extended Area***.

Action bar (Work Areas)



Search



New Document



Local Documents



Process management

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.

The documents listed in the tab ***Local documents*** depend on the selected document type.

Also see: Local documents.

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**.

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***.


83%
View
efalia ecm
Version 4.5
User Guide
WebClient 1.5
efalia

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***.

Search History

Overview

Search History unterstützen bei wiederkehrenden Suchanfragen.

Der Efalia ECM WebClient speichert automatisch im Hintergrund die Suchanfragen in einer Browser-Sitzung in einer Liste und nummeriert diese ***Suche 001***, ***Suche 002***, etc.

Die automatisch angelegten Elemente auf dieser Liste sind nur temporär innerhalb der Browser-Sitzung verfügbar.

Sie können umbenannt und gespeichert werden.

Search History Window

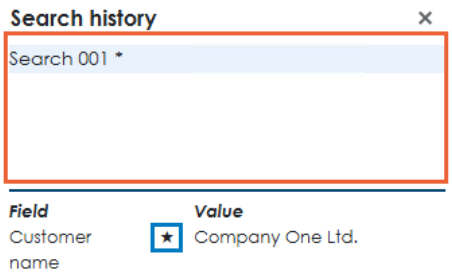
Im oberen Bereich wird die Liste der vorhandenen Suchvorgänge angezeigt.

Die ***Liste*** ist auf dem Screenshot unterhalb orange umrandet.

Die Tabelle unterhalb listet die ***Felder*** und ***Indexwerte*** auf, welche bei der ausgewählten Suche verwendet wurden.

Ebenso wird auch der Operator angezeigt, welcher bei dieser Suche verwendet wurde.

Der ***Operator*** ist auf dem Screenshot unterhalb blau umrandet.



Working with Search History



The parameters of the selected search history entry are transferred to the ***Search*** tab of the Efalia ECM WebClient using .

Here, individual values or operators can be changed before running a new ***Search*** or ***Advanced Search***.

Once this modified search has been run, it appears as a temporary entry in the ***Search history***.

Temporary Entries



A temporary entry are additionally marked with *.

Rename



The selected element in the list can be renamed using .

Save search

A search can also be saved in the ***Search history*** and is then permanently available for this account.

Delete Entry



The selected element in the list can be deleted using .

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 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.

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.

Use Search Parameter

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

Example

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

Hidden operators



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

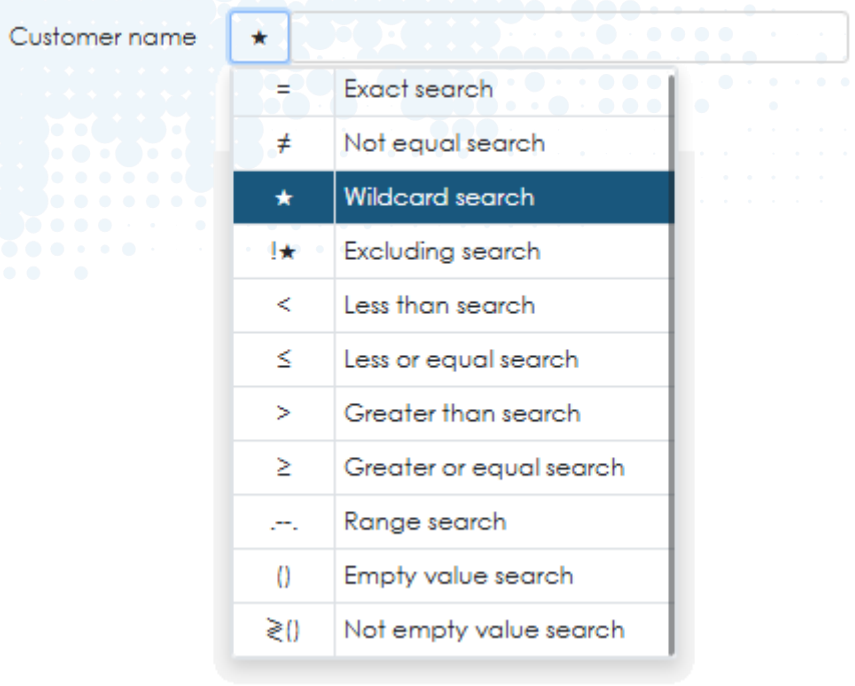


Displayed operators



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
=	Exact search
≠	Not equal search
★	Wildcard search
!★	Excluding search
<	Less than value specified
≤	Less 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

Simplified Search (Extended Area)

Depending on the structure of the Efalia ECM Cabinet, the ***Extended Area*** is displayed and can also be used to perform a search, by double-clicking (left mouse button) on the document type.

Note

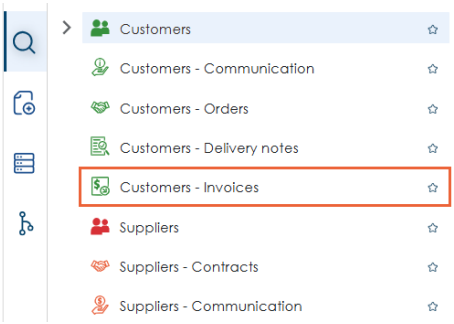
This simplified search does not use any field values, potentially entered into any of the corresponding fields in the **Search** tab.

Cabinet using Field Views

The left mouse button double-click can be performed on any document type displayed in the Extended Area.

Example

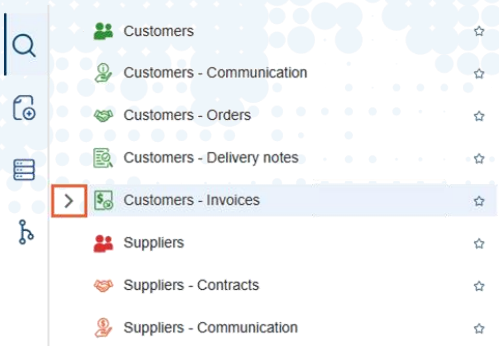
In this example, a double-click was performed on the document type ***Customer invoice***.



If the search returns hits in the corresponding document type, the result is shown in the tab ***Hitlist***, on the right.

In case, a ***Field view*** has been setup for this document type, a positive search result is also visualised by the icon, shown in the image below.

By clicking on the icon, the list of found documents can be expanded.



Cabinet using Filing System

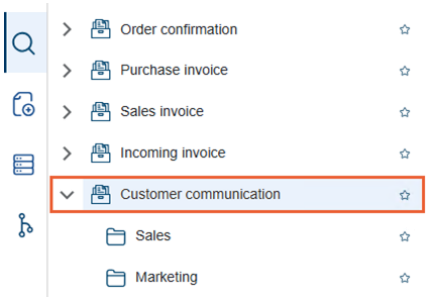
If an Efalia ECM Cabinet was designed with a Filing System structure, the simplified search can only be performed on document type level, see the example below.

Example

Document types are displayed in the ***Extended area*** with the following symbol:



The result is shown in the tab ***Hitlist***, on the right.



Search Profiles

Overview

Search profiles support recurring searches e.g. searching for accounts receivables.

The profiles are set up and deployed via the Efalia ECM Enterprise Manager and are only available in Efalia ECM WebClient/WebClient Server.

Working with Search Profiles

The Efalia ECM system adds automatically an ***asterisk*** (*) after the entered search value.

This means that any character may follow the entered search value.

Example

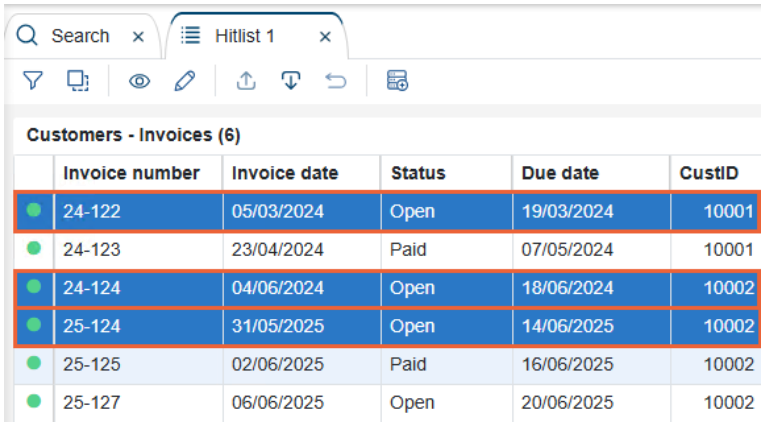
Search Query 24 vs. *24

In some cases, the search value is not located at the beginning of the index value in a field.

In these cases, the search value must be preceded by an ***asterisk*** (*).

Documents in the System

There are several documents stored in the system that contain the number ***24*** in the field ***Invoice number***, but not all starting with ***24***.

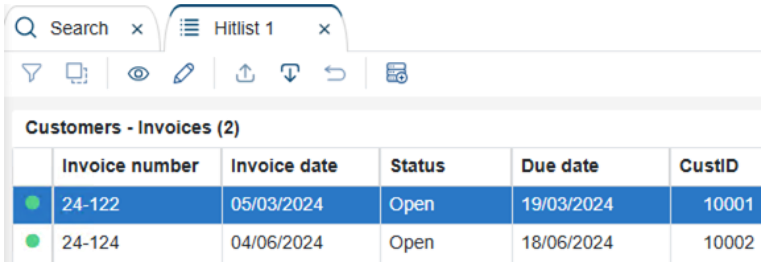


Search Query with 24



In this example, the ***Hitlist*** will only display documents where the index value in the applied fields starts with ***24***.

A document with the index value ***25-124*** in the applied fields will not be listed.

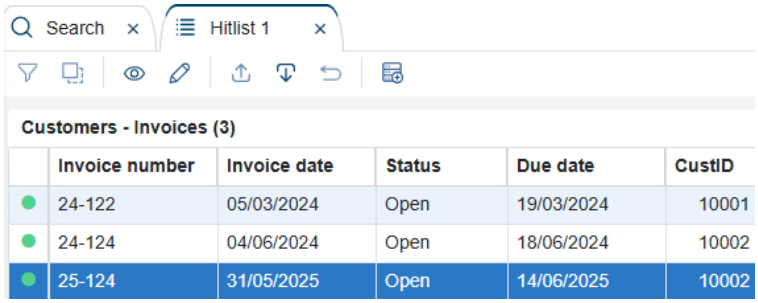


Search Query with *24



In this example, the ***Hitlist*** will display documents where the index value in the applied fields contains ***24***.

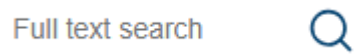
A document with the index value ***25-124*** in the applied fields will also be listed.



Active mode: Full-text Search/Search Profiles

The two modes can be distinguished by the displayed text and a unique symbol.

Full-text Search



Search Profile



Select a Search Profile

Once set up, Search profiles are available via the Title bar of the Efalia ECM WebClient/WebClient Server.

After starting the Efalia ECM WebClient, the Title bar provides access to the full text search by default.



Configured search profiles are available and can be selected via the drop-down menu on the right.



Now, the ***Title bar*** shows ***Search*** and the corresponding ***Search profile icon*** and search queries entered now will be processed with the previously selected ***Search profile***.



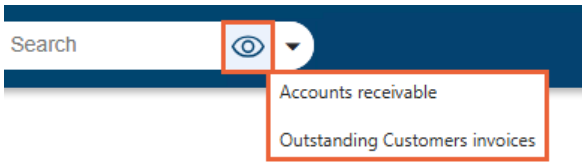
Active Search Profile

The active ***Search profile*** is displayed when the mouse pointer is moved over the Search profile icon in the title bar.

Example

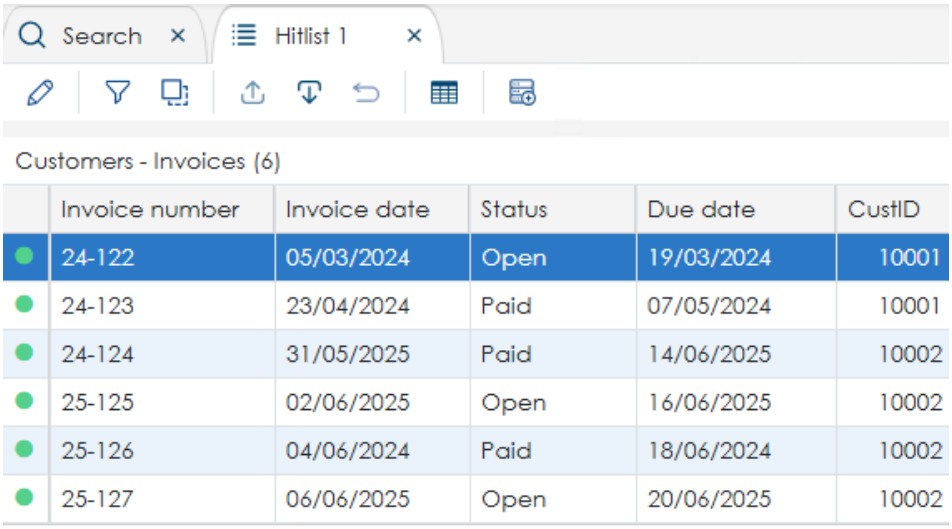
In the example below, the ***Search profile Accounts receivable*** is selected.

The tooltip shows the name of the Search profile and the description, set up in the Efalia ECM Enterprise Manager.



Conditions

Documents in the System



Invoice number	Invoice date	Status	Due date	CustID
24-122	05/03/2024	Open	19/03/2024	10001
24-123	23/04/2024	Paid	07/05/2024	10001
24-124	31/05/2025	Paid	14/06/2025	10002
25-125	02/06/2025	Open	16/06/2025	10002
25-126	04/06/2024	Paid	18/06/2024	10002
25-127	06/06/2025	Open	20/06/2025	10002

Pre-defined Search Profile

The Search profile has been set up with the following definitions:

- Document Type
  - Customer – Invoice
- Fields
  - Invoice number
  - CustID
- Default search value
  - Status = Open

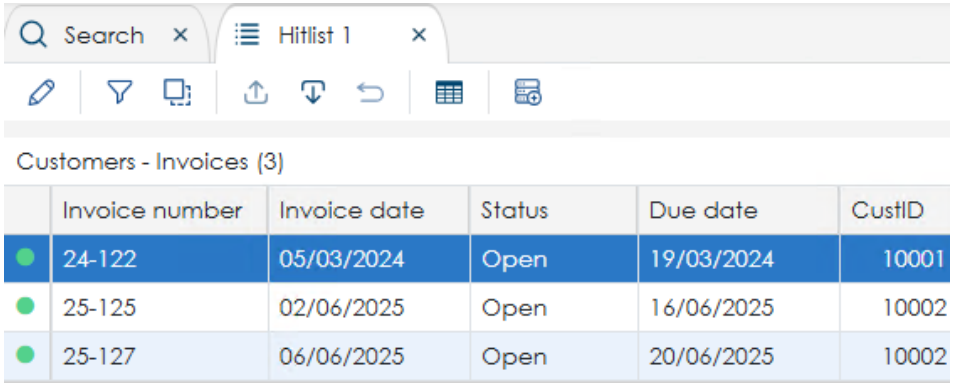
Example 1

Search without a specified value



In this example, the search is run without any specified value by clicking the ***Search profile icon*** on the ***Title bar***.

Now, the Efalia ECM Server returns all documents stored in ***Customer – Invoices*** where the field ***Status*** contains ***Open***.



As only the ***Default search value*** is automatically applied, the ***Hitlist*** contains documents where the ***CustID*** is ***10001*** or ***10002*** and where the Invoice number is ***24-*** or ***25-***.

Example 2

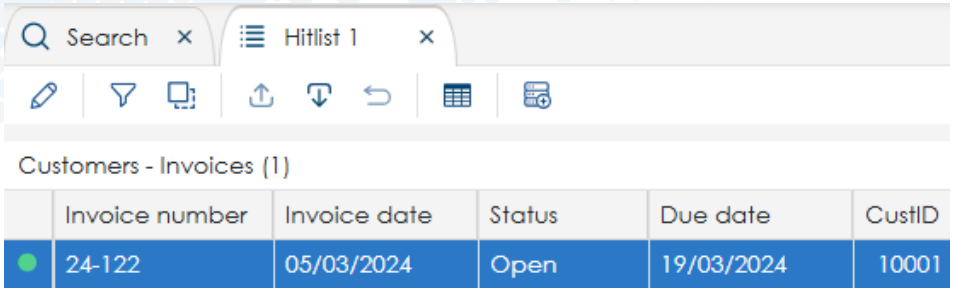
Search with a specified value



In this example, the search is run with the specified value ***10001*** by clicking the ***Search profile icon*** on the ***Title bar***.

Now, the Efalia ECM Server returns only documents stored in ***Customer – Invoices*** where the field ***Status*** contains ***Open*** and the ***CustID*** or the ***Invoice number*** starts with ***10001*** even though there are other invoices with the status open in the system.

But these documents do not match the search query ***CustID*** or ***Invoice number*** starts with ***10001*** and ***Status*** = ***Open*** (automatically added ***Default search value***).



Example 3

Search with a specified value

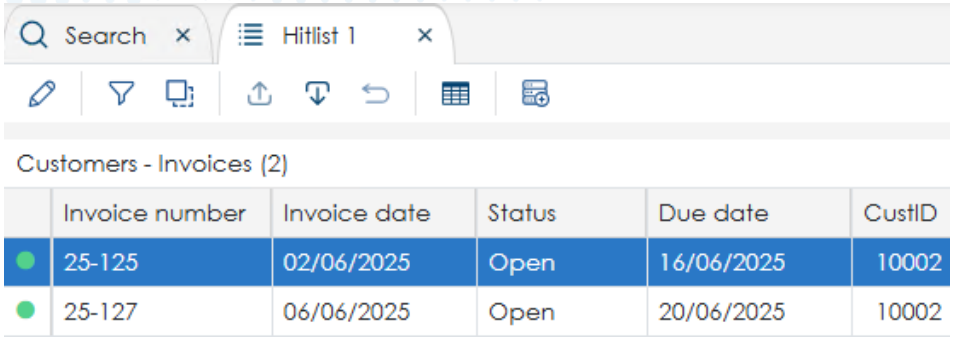
10002

In this example, the search is run with the specified value ***10002*** by clicking the ***Search profile icon*** on the ***Title bar***.

Now, the Efalia ECM Server returns only documents stored in ***Customer – Invoices*** where the field ***Status*** contains ***Open*** and the ***CustID*** or the ***Invoice number*** starts with ***10002*** even though there are other invoices with the status open in the system.

But these documents do not match the search query ***CustID*** or ***Invoice number*** starts with ***10002*** and ***Status*** = ***Open*** (automatically added ***Default search value***).

Example 4



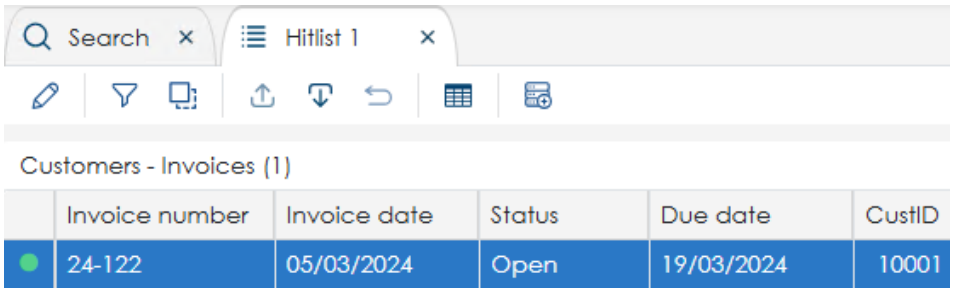
Search with a specified value

24

In this example, the search is run with the specified value ***24*** by clicking the ***Search profile icon*** on the ***Title bar***.

Now, the Efalia ECM Server returns only documents stored in ***Customer – Invoices*** where the field ***Status*** contains ***Open*** and the ***CustID*** or the ***Invoice number*** starts with ***24*** even though there are other invoices with the status open in the system.

But these documents do not match the search query ***CustID*** or ***Invoice number*** starts with ***24*** and ***Status = Open*** (automatically added ***Default search value***).



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 Hitlist



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.

Note

Once a search has been performed, the **Hitlist** tab remains visible even if the workspace has been changed via the **Action bar**.

Context Menu: Right Mouse Button

For further information also see:

Context Menus: Right Mouse Button - Search (Hitlist)

Create

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.

Add Multiple Files

When additional files are added to a document, they are ***prepended***/***inserted*** or ***appended***, depending on the thumbnail selection.

Prepend/Insert

When a thumbnail is selected, the new file is ***prepended***/***inserted***, above the selected thumbnail.

Append

If no thumbnail is selected, the new file will be ***appended*** to the end of the document.

Select/Deselect Thumbnails

Thumbnails can be selected/deselected via ***CTRL + Left Mouse Button***.

Thumbnail	Status
	Selected

Thumbnail	Status
	Deselected

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.

Advanced Scan Options

The ***Advanced Scan Options*** allow you to add pages to documents.

You can define the position at which the pages are added using the three available options.

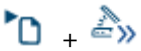
The basic order is identical for all three ***Advanced Scan-Options***.

Important

The **Advanced Scan Options** should only be used in combination with the **Batch Scan** option.

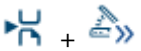
1. Document selection
2. Display document in ***Edit-Mode*** (✎)
3. Choose position in the document
4. Select one of the Advanced Scan Options
5. Start the scanning process with the scan option ***Batch*** (»)

Prepend Page



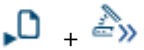
When using the ***Prepend Page*** function, the action is performed above the selected page.

Insert Page



When using the ***Insert Page*** function, the action is performed above the selected page.

Append Page



When using the ***Append Page*** function, the scanned pages are appended to the end of the document.

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.

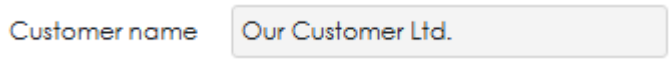
Icon	Function
	Edit

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

From the Efalia ECM WebClient version 1.5 onwards, the document type of an already checked-in document can be changed using the function ***Move documents***.

The function can be accessed via the right-click context menu.

See also: Context Menus: Right Mouse Button

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

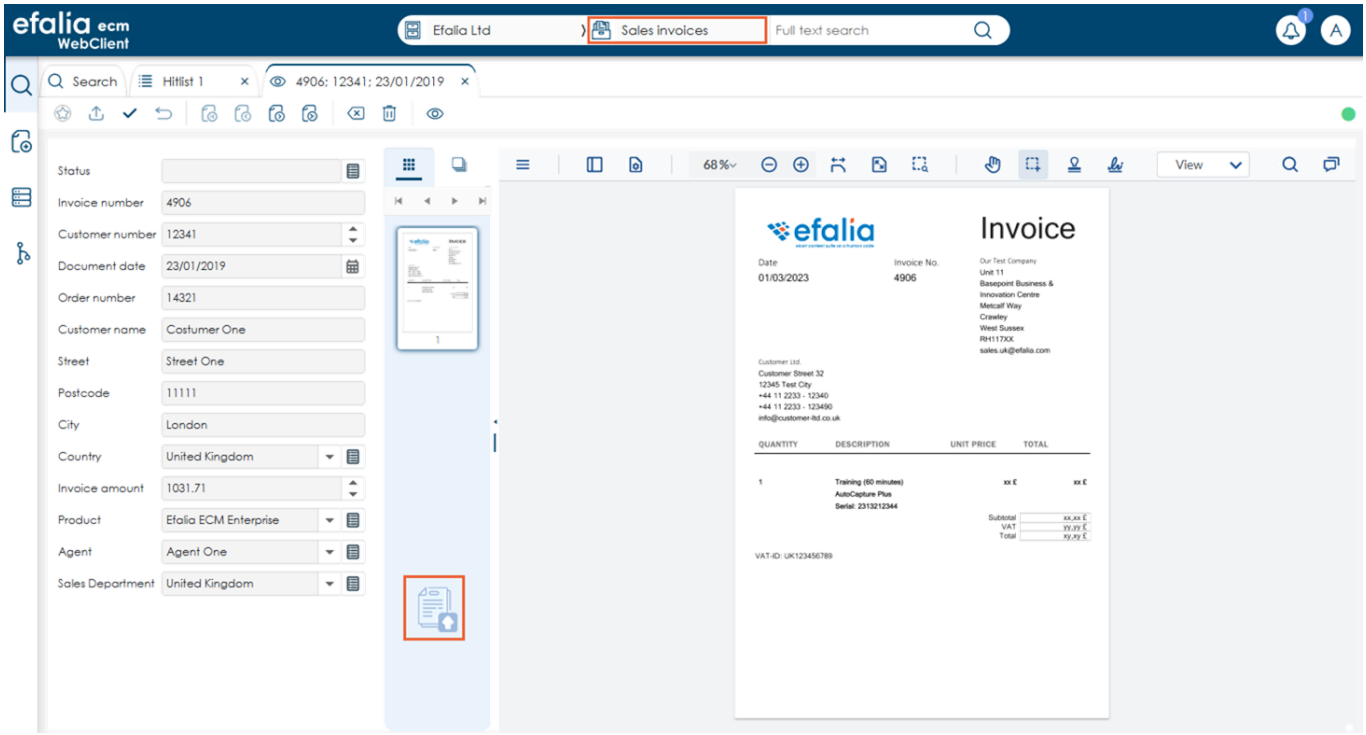
A prerequisite is that the logged in user has the appropriate permissions.

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 tab ***Document*** is extended to include area for adding new pages or files to the respective document.



Drag & Drop



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 now added to the document.

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.

Insert/Append

When a document is displayed, the first page is shown by default and the corresponding thumbnail is also selected.

Now, any added files are automatically inserted above the selected thumbnail.

However, the thumbnail can be manually deselected.

If no thumbnail is selected, the new content will be ***appended*** to the end of the document.

Select/Deselect Thumbnail

Thumbnails can be selected/deselected via ***CTRL + Left Mouse Button***.

Thumbnail	Status
	Selected
	Deselected

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.

Extended Functions

Print

Print from Hitlist



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

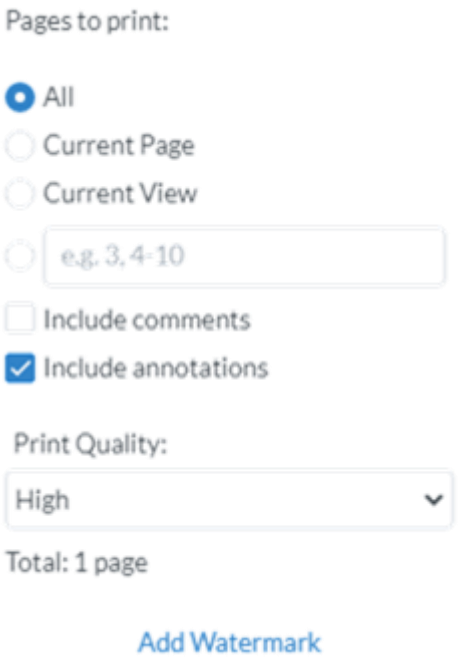
This option allows you to print the whole Efalia ECM without annotations, if any.

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.

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 in the cache of the respective browser for the logged-in user.

The documents listed in the tab ***Local documents*** depend on the selected document type.

Also see: Local documents

Note

The display of documents in the tab **Local documents** depends on the document type selected in the **Title bar** or in the **Extended area**.

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.

Email



1. Select the document or the documents to be sent
    - If multiple documents are to be attached to a single email, all documents must be stored in the same document type.
2. Right-click and select ***Send to…*** ⇨ ***Email***.
3. A new email opens in your default email client.
4. The selected elements are now attached to the new email.
    - The documents are attached to the email in their original format.
5. You can now edit and send the email as usual in your email client

Email (PDF)



1. Select the document or the documents to be sent
    - If multiple documents are to be attached to a single email, all documents must be stored in the same document type.
2. Right-click and select ***Send to…*** ⇨ ***Email (PDF)I***.
3. A new email opens in your default email client.
4. The selected elements are now attached to the new email in PDF format.
5. You can now edit and send the email as usual in your email client

Note

If the document contains zip file or files, the content of the zip file (Name, Size and Modified) is listed in the pdf file.

Email as link



1. Select the document or multiple documents from a list
    - To insert links to multiple documents into a single email, all documents must be of the same document type.
2. Right-click the document and select ***Send to…*** ⇨ ***Email as link***.
3. A new email will open in your default email client.
4. The links to the selected items will appear one below the other in the body of the new email.
    - One link will be inserted for each selected document.
5. You can now edit and send the email as usual in your email client.

The default name of the link is ***Document #.***

Depending on your email client, you may be able to change the link name later within the client.

Save as…



This option is available via the right-click context menu within the tab ***Hit list***.

The option available may vary depending on the selection.

Original



The option ***Original*** is only available if:

- Only ***1 document*** was marked in the Hit list.
- The marked document consists of only ***one file***.

PDF



If a single document is selected, it will be converted to PDF and stored in a single PDF file.

If multiple documents are selected, a dialog box will appear that allows you to save all documents in one PDF file or to generate one PDF file per selected document.

ZIP



This option is always available.

The elements of the selected documents are saved in their original format in a ZIP file and stored in the Windows ***Downloads*** folder of the logged-in Windows account with which the browser for the Efalia ECM WebClient was opened.

Export List



The ***Export List*** function can be used with ***Hitlists***, in the areas ***Local documents*** and in ***Process management***.

It allows you to easily export the ***selected rows*** of the displayed list to a ***PDF***, ***XLS***, or ***XLSX file***.

This does not export the respective documents.

In the ***Export List*** window, in addition to the file format, you can define whether to export all columns or only selected columns.

You can also choose between ***Portrait*** and ***Landscape*** orientation.

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.

List

The list in the area ***Process management*** shows all documents available for editing by the logged-in account.

New documents on the list are displayed in bold.

Process Information

Information about the Efalia ECM processes is displayed in the right-hand section of the browser.

Example

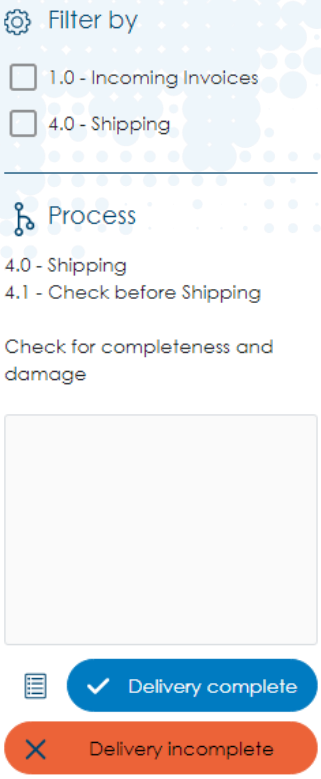
In the example shown below, documents are available for editing within a single user step for the logged-in account.

The area ***Filter by*** indicates that these documents belong to Efalia ECM processes ***1.0 – Incoming Invoices*** or ***4.0 – Shipping***.

The section ***Process*** displays information about the user step of the selected document.

This includes the ***name of the Efalia ECM process*** (4.0 – Dispatch) and the ***name of the user step*** (4.1 – Check before dispatch).

Below is the description of the user step (checking for completeness and damage), the comment field and the available actions (checklist, delivery complete, delivery incomplete).



Filter by



This section is only displayed in the tab ***Process management***.

Here, you can filter the displayed list of available documents by process.

Process



This area is displayed in the tab ***Process management*** and when ***displaying the document***.

This area shows process information of the selected or displayed document.

Default Elements

Name of the Process

This is set-up in Efalia ECM Enterprise Manager.

Name of the User Step

This is set-up in Efalia ECM Enterprise Manager.

Description

This is set-up in Efalia ECM Enterprise Manager.

Comments

Beinhaltet Kommentare, die in vorangegangenen Schritten eingetragen wurden.

Possible User Actions

Die möglichen Benutzeraktionen und deren Bezeichnungen werden im Efalia ECM Enterprise Manager definiert.

Optional Elements

User-defined Action



These is set-up in Efalia ECM Enterprise Manager.

User-defined actions must be confirmed before a document can be routed along an approval path.

Field views (Related Content)

Overview



Field views in Efalia ECM are a simple way to create related content and improve the visualisation of related documents.

The connection is done via an ***Efalia ECM Field*** of type ***Document***.

This displayed value can be configured by an administrator in Enterprise Manager to ensure even faster document assignment.

These settings apply to all accounts.

Full Text Search and Field Views

The information displayed in fields of type ***Document*** cannot be used in a full-text search.

The displayed information is based on a field view and represents an association to another document in the Efalia ECM system, not an index value.

Display of Fields of Type Document

Within Tabs

The field label is displayed with a ***Drop-down symbol*** at the end.

Clicking the icon opens a ***List of Documents*** available for linking. The elements of this list are determined by the definition stored in the Efalia ECM Enterprise Manager.

Example

Collapsed



Expanded



The two elements (***Company One Ltd., CustID 10001*** and ***Company Two Ltd, CustID 10002***) shown in this example represent two documents, which in this case are stored in the document type ***Customers***.

The displayed value is composed of the values entered in the fields ***Name*** and ***CustID*** of the document type ***Customers*** for this document.

Within Hitlists

As with other Efalia ECM Fields, the name of a field is used as the title of a column and, as with the display within tabs, the label is shown in ***italics***.

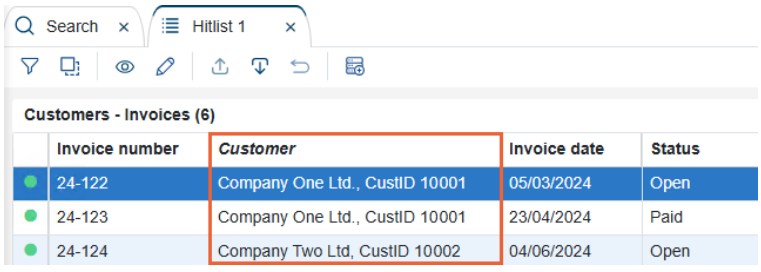
Example

In the example below, the column ***Customer*** shows that the invoice ***24-122*** and ***24-123***, stored in the document type ***Customers – Invoices*** are linked with document, stored in a different document type.

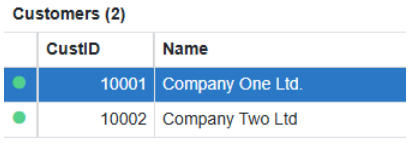
In this example these documents are linked with a document stored in the document type ***Customers***.

The displayed value is composed of the values entered in the fields ***Name*** and ***CustID*** of the document type ***Customers*** for this document.

Hitlist: Customers - Invoices



Documents stored in Customers



Working with Field Views

Linking Documents

A relation between documents is created via fields of the type ***Document***.

The field label is displayed in ***italics*** and the field ends with a ***Drop-down symbol***. The field lists the available documents. This list of documents is based on a ***Field view***, created in the Efalia ECM Enterprise Manager.

Each entry in this list represents a specific document in the Efalia ECM system.

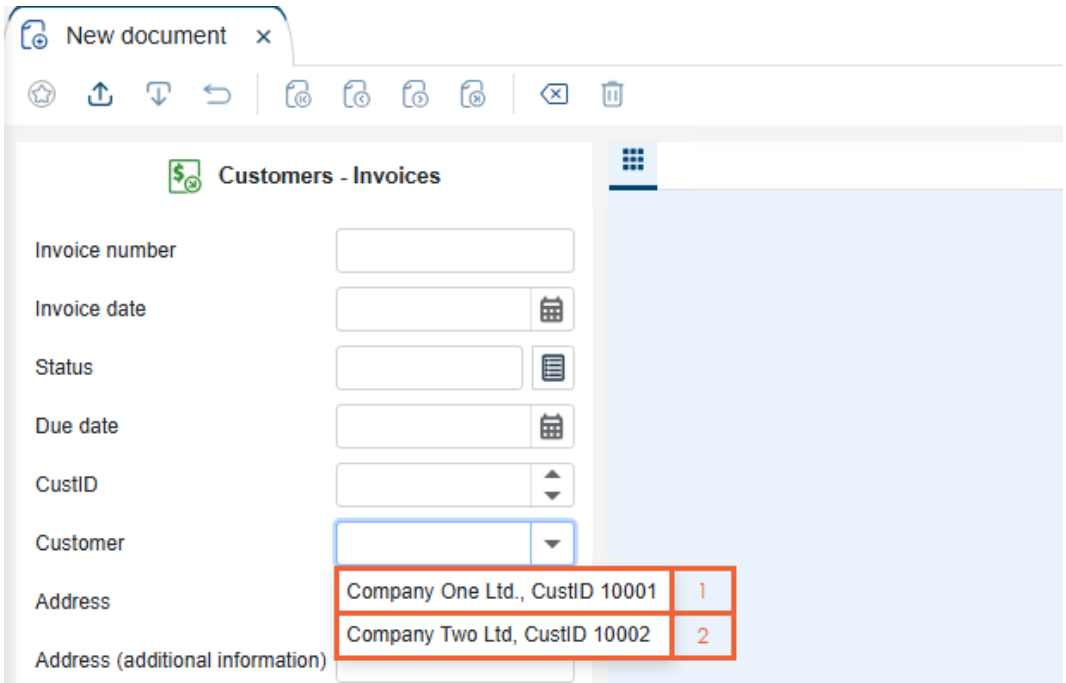
Thus, the value displayed in the field after selection corresponds to the document with which the relation was created.

Example 1

New Document

A new document in the document type ***Customer – Invoices*** is created.

The document type ***Customer – Invoices*** contains a ***Document*** field, labelled ***Customer***, which allows it to create a relation of content.



The two entries in the list above represent the two documents, highlighted on the image below, stored in the document type ***Customers***.

Selecting the first entry from the list, the new document, created in ***Customer – Invoice***, is related to the document displayed as ***Company One Ltd., CustID 10001***.

Customers (2)

	CustID	Name	Address	City
1	10001	Company One Ltd.	Test Street 1	Manchester
2	10002	Company Two Ltd	Test Street 2	Swanage

As the relation is created between a selected document, the information, displayed in a Efalia ECM Field ***Document*** changes, based on the values of the related document.

Customers - Invoices (1)

Customer	Invoice number
Company One Ltd., CustID 10001	25-128

Example 2

Change of Index Values used for Field views

In this example, the index in the field Name was changed from ***Company One Ltd.*** to ***Changed Name Ltd.***.

Customers (2)

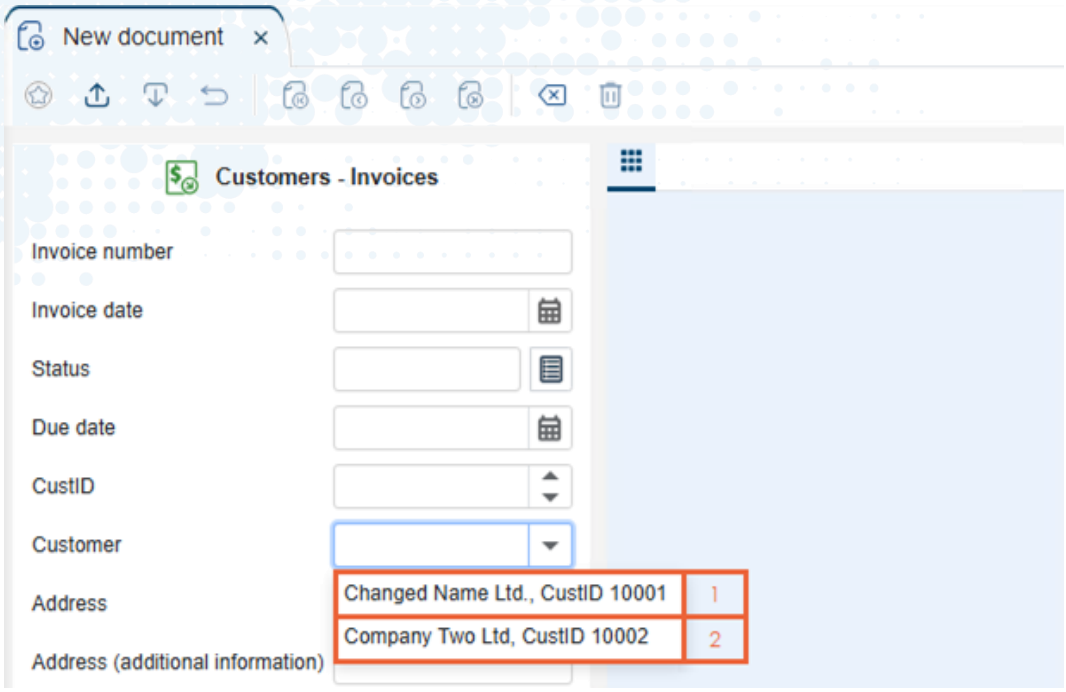
CustID	Name	Address	City
10001	Changed Name Ltd.	Test Street 1	Manchester
10002	Company Two Ltd	Test Street 2	Swanage

This will automatically affect the way, the document is displayed in the Efalia ECM Field of type ***Document*** labelled ***Customer*** in the document Type ***Customers – Invoices***.

Customers - Invoices (1)

Customer	Invoice number
Changed Name Ltd., CustID 10001	25-128

This changed index value also affects the list, shown when creating new documents after the change but the when selecting now ***Changed Name Ltd.***, the relation is still created with the same document, used in the example above.

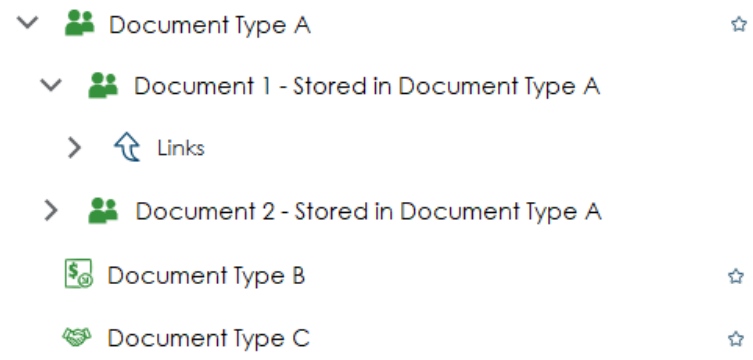


Display Linked Documents

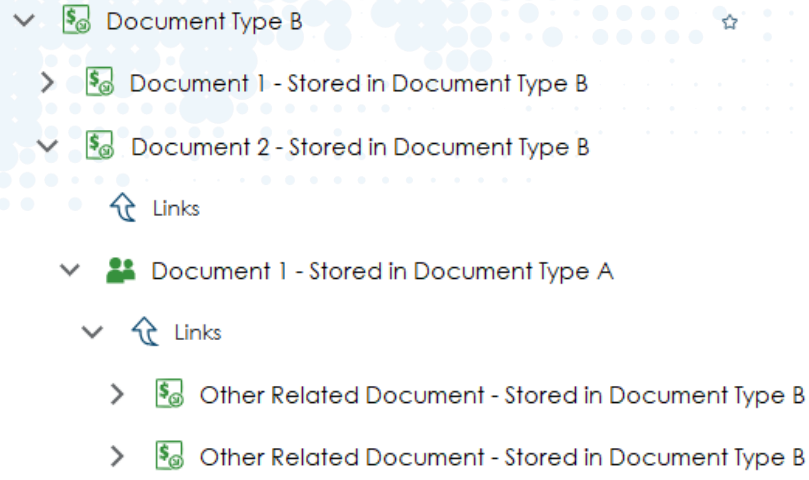
When an Efalia ECM Cabinet includes Field views, the WebClient displays all accessible document types of the ***Extended Area***.

Related documents are accessible either from the related document via ***Links*** or directly out of the respective document type.

General Structure for Display (Related Documents/Links)



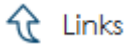
General Structure for Display (Related Documents/Related with)



Example 1

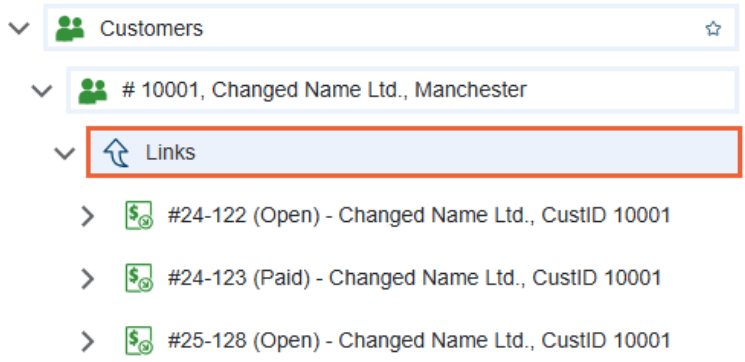
Access via the Related Document

In this example, the invoice ***25-128***, stored in the document type ***Customers – Invoices***, is related with a document stored in the document type ***Customers***.



As a result, the invoice ***25-128*** is listed in the section ***Links*** of the document listed as ***# 10001, Changed Name Ltd., Manchester***.

It can now be displayed by double-clicking.



Example 2

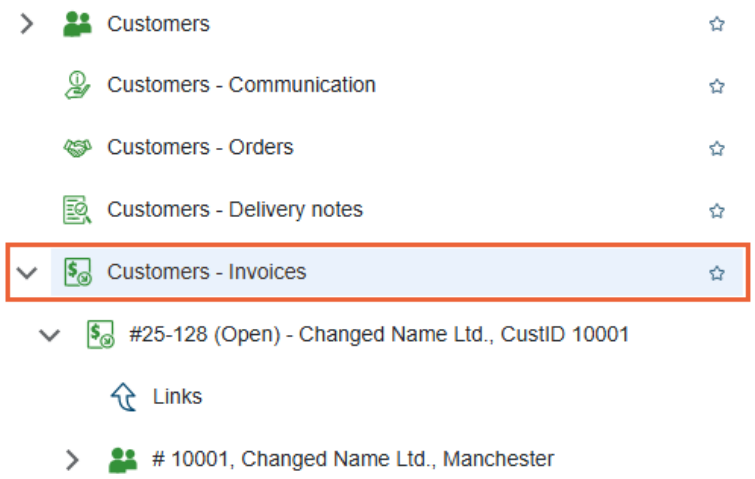
Direct Access via the Document Type

In this example, the invoice ***25-128*** is stored in the document type ***Customers – Invoices***.

It can directly be displayed by double-clicking.

The image below also shows that the invoice 25-128 is related with a document, stored in the document type ***Customers***.

Here it would now also be possible to list further documents that are related to this document in the document type ***Customers***.



Edit Related Documents

The same editing options are available for related documents as for documents that do not use this feature.

Edit Relations

This can be done by changing the selected document in an Efalia ECM

Note

A change may also change the display and the position where the document is listed in the **Extended Area**.

Binders



Overview

Binders can be created individually for each account via the Efalia ECM WebClient interface and allow documents to be grouped, thus allowing faster access.

Create



Name

The name entered here will later appear in the list of available Binders and when using ***Send to***.

Description

The ***Description*** entered here will be used for the ***Tooltip***.

Also see: Active Binder.

Edit



The ***Name*** and ***Description*** of Binders can be changed here later.

Note

Changing the **Name** or **Description** of a **Binder** does not affect its content.

Delete

Deleting a Binder does not delete the documents contained in that Binder, only the Binder.

Important

A deleted Binder cannot be restored.

The documents it contained must be manually added to a newly created Binder.

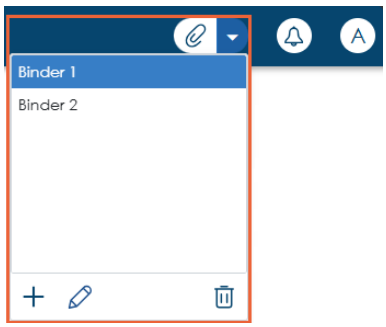
Working with Binders

Binders can be ***created***, ***selected***, ***opened***, ***edited*** or ***deleted*** via the ***Title bar*** in the WebClient.

Example

In the example below, ***Binder 1*** is selected, a document is added to the Binder, and the Binder is then opened.

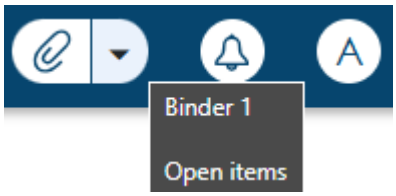
Selecting a Binder



Active Binder

The active ***Binder*** is displayed via a ***tooltip*** when you hover the mouse pointer over this area without pressing a mouse button.

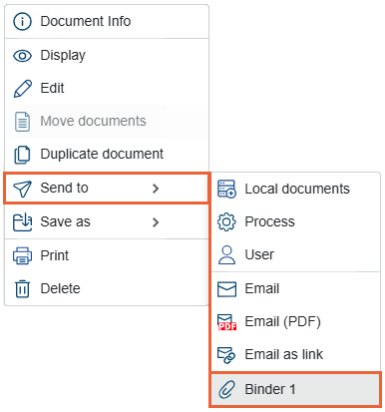
The ***tooltip*** contains the Binder ***Name*** and the given ***Description***, if information was entered under ***Description***.



Adding Documents

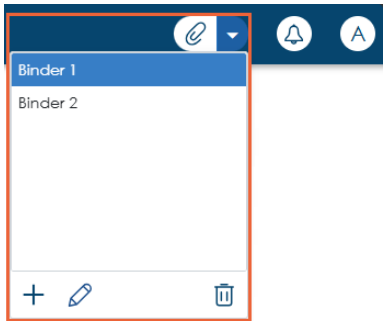
After selecting a Binder, documents can be sent to the previously selected Binder using the right-click context menu and selecting ***Send to***.

In this example, ***Binder 1*** was previously selected.



Open a Binder

A ***Binder*** can be selected using the drop-down menu in the title bar of the Efalia ECM WebClient and the content can be displayed by double-clicking on the Binder.



The selected ***Binder*** will then be displayed in a tab below.

The name of the open ***Binder*** will be displayed in the tab.

In this example, ***Binder 1*** was selected by double-clicking.

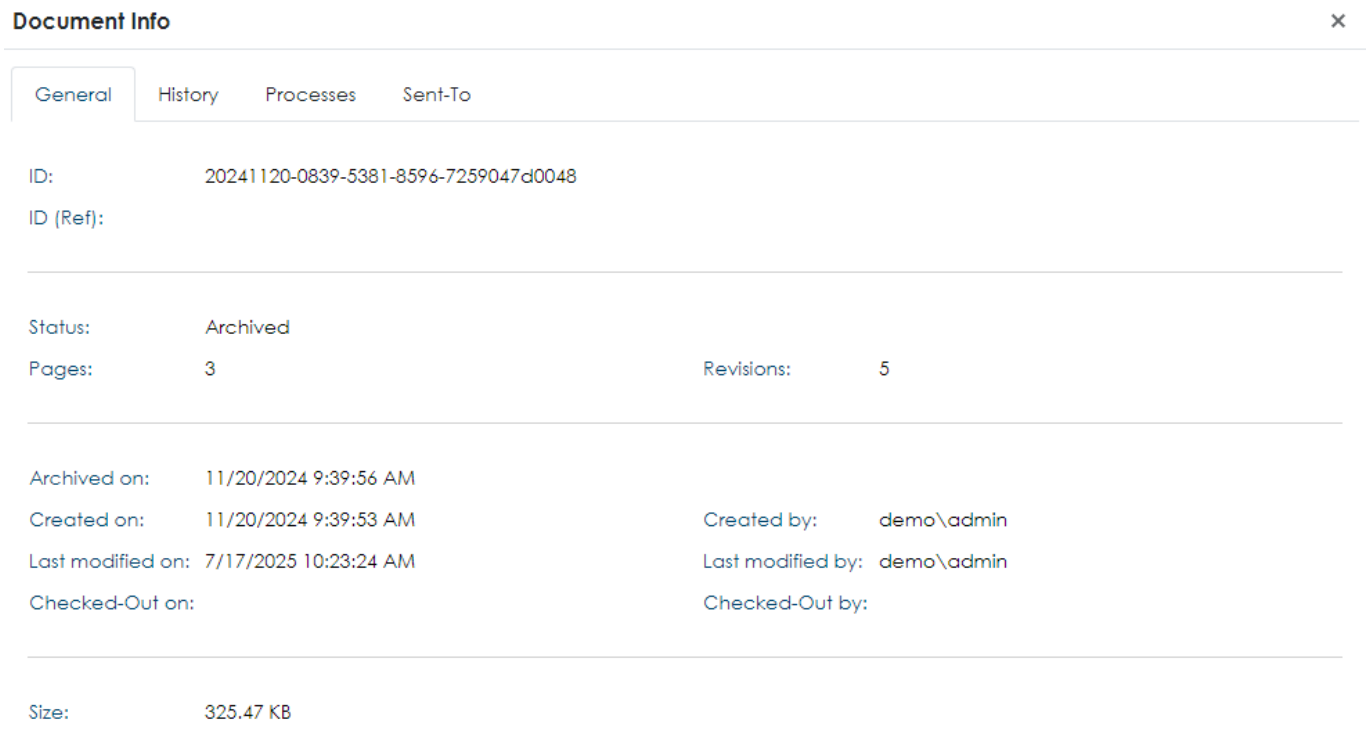


Document Information

Every action that is performed on a document in Efalia ECM can be logged. A list of these actions can be displayed by an administrator user.

A description of the document information is given below, general information such as when the document was created, by which user, its size and the number of revisions can be viewed. The document history contains a list of retrieval activities and modifications. Other information about process activities and sending of documents is also stored and can be viewed.

To view information on a document, select the document in a ***Hitlist***, right-click and select ***Document Info***. A window which shows all information on the document is opened and is divided into four sections, selectable by choosing the appropriate tab.



General

This displays general information about the document.

Information	Description
ID	Unique number (ID) of the document
ID (Ref)	

Information	Description
Status	Actual status : Archived, Checked Out, Read only
Pages	Number of pages
Revisions	Number of revisions
Archived on	Date of archiving
Created on	Date of first storing in the Cabinet on the server
Created by	The user who created the document
Last modified on	Date the document was last modified
Last modified by	The user who last modified the document
Checked-Out on	Date/Time of Check out
Checked-Out by	The user who has the document checked-out
Size	Size of the document

History

In the tab ***History*** you can view information about actions performed.

The table shows the action (***Created***, ***Modified***, ***Retrieved***), the corresponding account (***Created by***) that performed this action and when this action was performed (***Created on***).

Processes

This tab shows information about the processes related to the corresponding document.

Information about ***User***, ***Action requested***, ***Action response***, ***Details***, ***Action taken on***, ***Comment*** and ***Signature*** is listed.

Sent-To

This tab displays information when a document has been made available to a user via the Send to User function within Efalia ECM.

Settings



Via ***Menu*** ⇨ ***Settings*** the Efalia ECM WebClient can be customised to run, for example, certain actions automatically after check-in.

To change these settings, select ***Settings*** from the ***Menu*** and then the tab ***General settings***. If settings have been changed, they are accepted by clicking ***OK***.

You can also use the tabs ***Password***, ***Layout*** and ***Absence*** to update passwords, adjust the general layout or set an absence.

Settings

Remove revised documents after check-in

A document that has already been archived and checked out for editing is shown on the list in the area ***Local Documents***. Enabling this option automatically removes a document from this list after it has been checked in after editing.

If this option is not set, a copy remains in the area ***Local Documents*** with the status ***Archived*** and must be removed from this list manually later.

Auto Check-In revised documents after edit

If documents are already stored on the server, this option allows them to be checked in automatically after editing.

If this option is enabled, the document is automatically checked in when the associated document viewer is closed.

If this option is not enabled, the document must be checked in manually, before closing the associated document viewer.

Remove new documents after check-in

If a document is created in the area ***New Document***, it will also be displayed on the list in the area ***Local Documents*** with the status ***New***.

If this option is activated, the document will be automatically removed from the list in this area when it is checked in to the server.

If this option is not activated, a copy with the status ***Archived*** will remain on this list and must be removed manually later.

Perform extended full text search by default

This option defines whether a full-text search should run on all available document types or only on the selected document type.

If this option is activated, a full text search will always run across all available document types.

Note

CTRL+Left mouse button on the magnifier symbol runs a full text search across all available document types without this option being activated.

Remember me

This option suppresses the login dialog.

Now, the Efalia ECM WebClient opens directly on this system using the appropriate credentials, provided this browser is used for access.

The option must be deactivated in the ***Settings***, manually, before a different account can be used for log-in.

Note

This option can only be used for a single account per browser.

Once it is activated, the corresponding browser will always use this account for log-in until the option is deactivated.

Absence

Configure Absence

When using the process management, the documents are sent to users for processing. The user will see the document in the action are ***Process management***. When a user is away they can specify a period for an appointed assistant. The appointed assistant needs sufficient rights to edit the document and to deputize for the user adequately.

The settings can be applied by selecting ***Menu*** ⇨ ***Settings*** ⇨ ***Absence***. This can also be done by an Efalia

Example

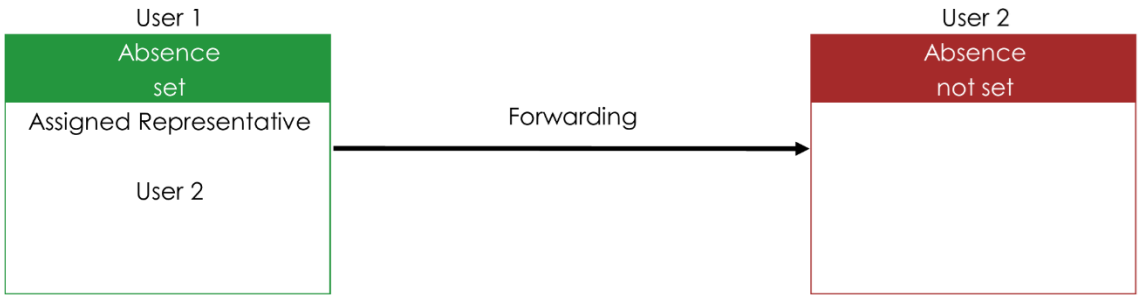
ECM administrator in Enterprise Manager.

Only one representative is set.

User 1 sets only User 2 as representative.

User 2 does not have an active absence setting.

The documents are forwarded to user 2.



Example

Only one representative is set.

User 1 sets as representative only user 2 and user 2 has an absence set.

The documents are not forwarded.



Example

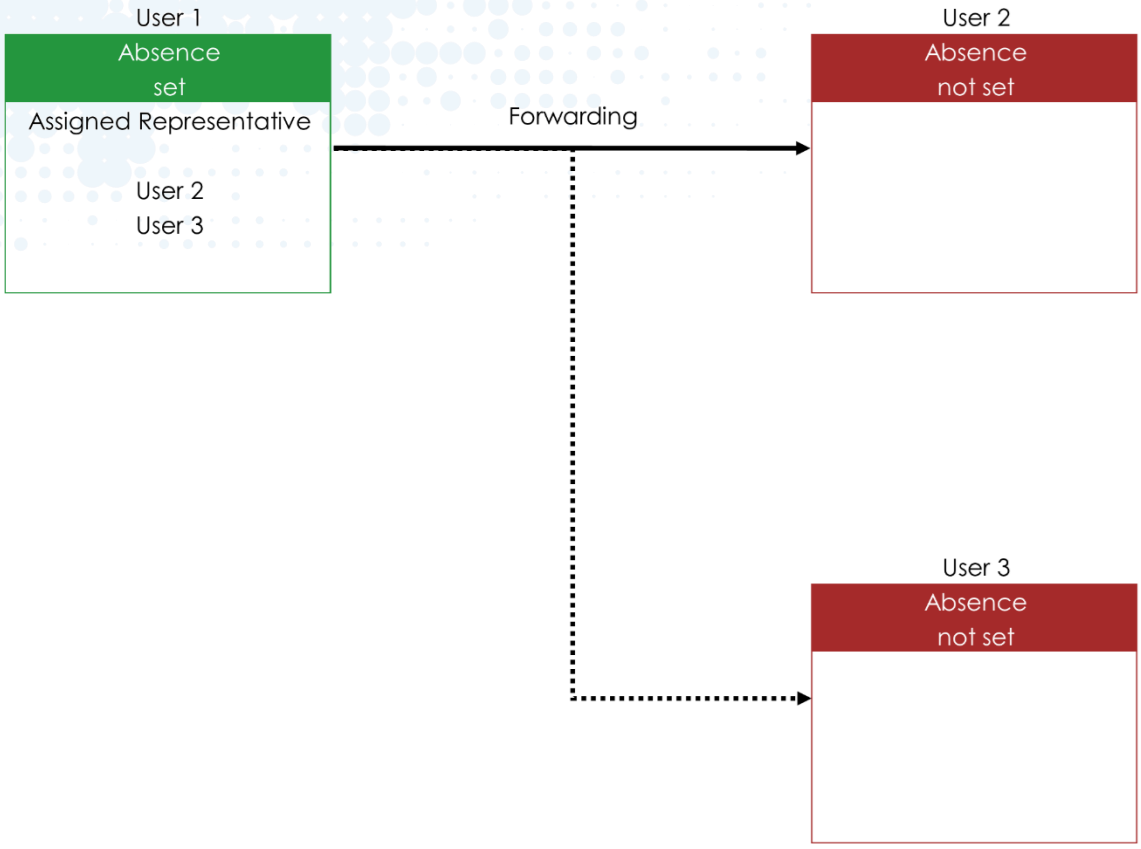
Several representatives are set.

User 1 sets User 2 and User 3 as representative during his absence.

Neither User 2 nor User 3 have activated the absence setting.

The documents are forwarded only to the first user in the list without active absence settings.

In this example, the document will only be forwarded to User 2.



Example

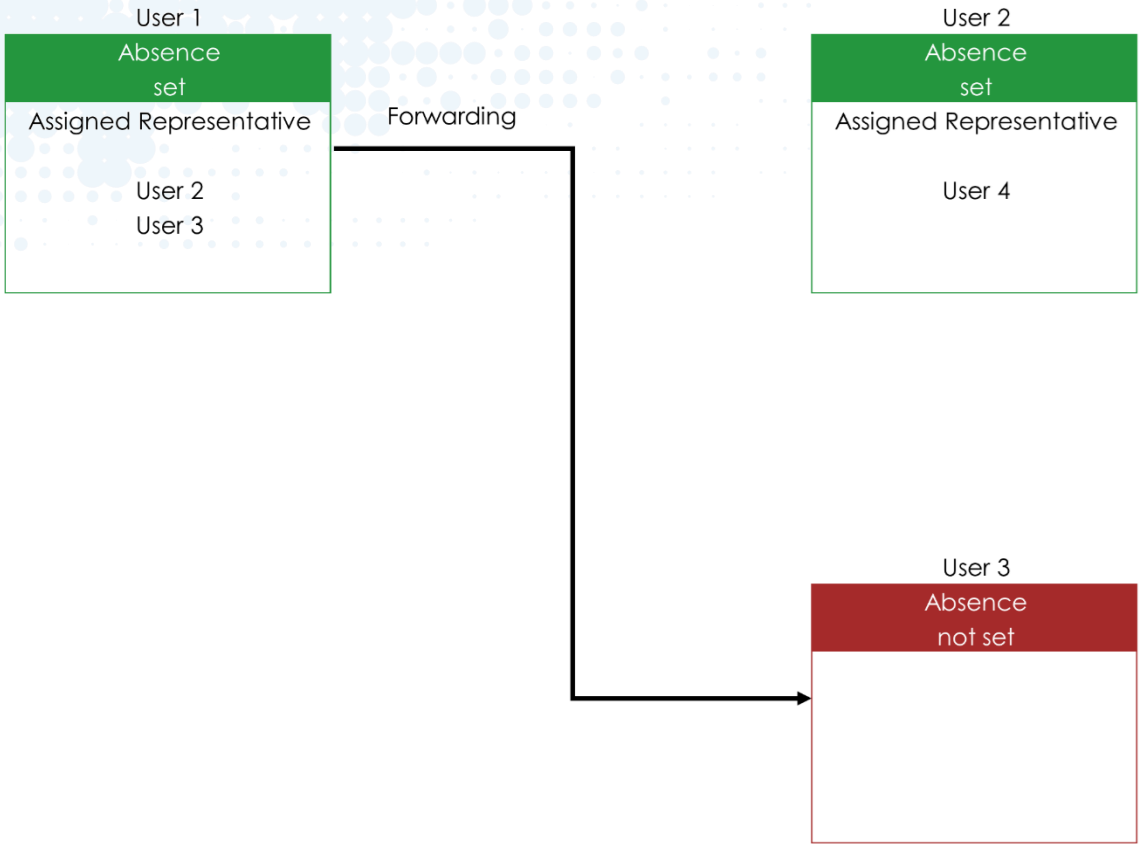
Several representatives are set.

User 1 sets User 2 and User 3 as representatives during his absence.

User 2 has also an activated absence but user 3 has not activated the absence setting.

The documents are forwarded only to the first user in the list without an active absence setting.

In this example, the document will only be forwarded to User 3.



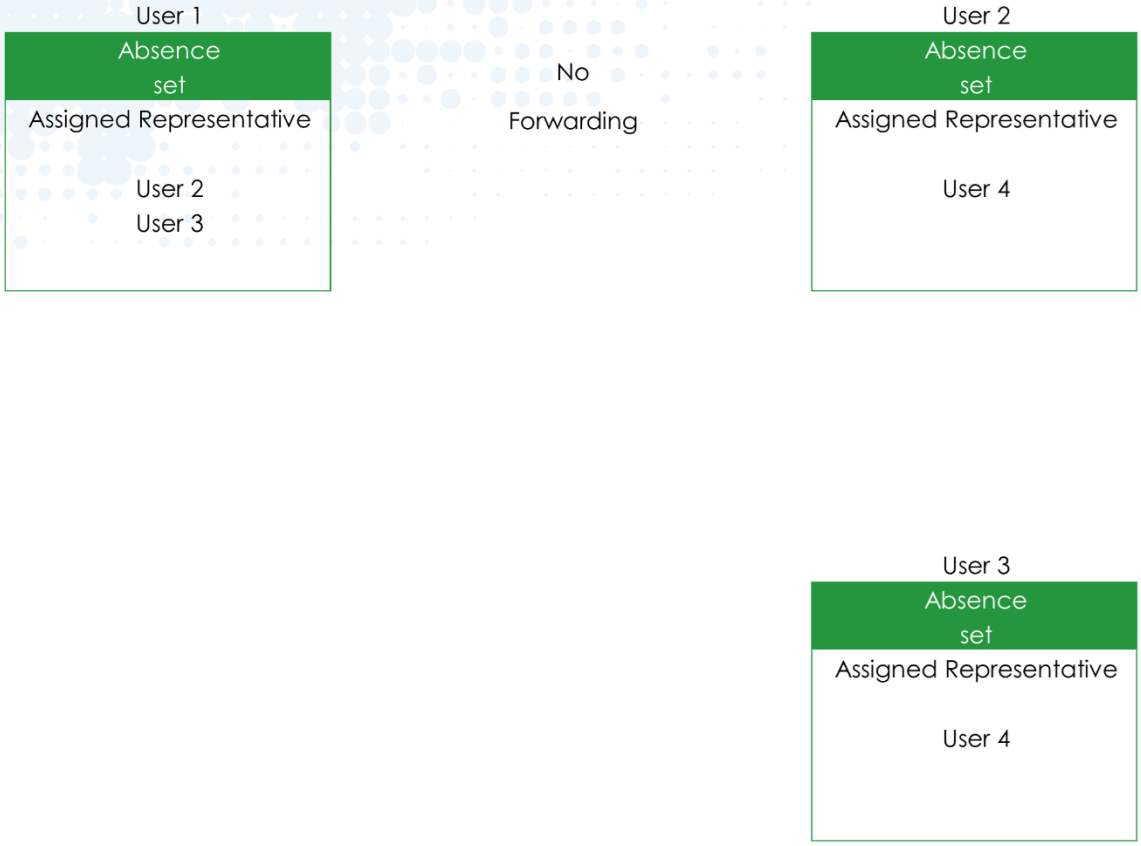
Example

Several representatives are set.

User 1 sets User 2 and User 3 as appointed assistants during his absence.

User 2 and User 3 have also an activated absence.

The documents are not forwarded.


User 1
Absence set
Assigned Representative
User 2
User 3
No Forwarding
User 2
Absence set
Assigned Representative
User 4
User 3
Absence set
Assigned Representative
User 4