efalia ecm

Version 4.1

User Guide
Web



efalia
smart content suite on a human scale

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

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

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

UK and Eire

Efalia Ltd
Unit 11
Basepoint Business & Innovation Centre
Metcalf Way, Crawley
RH11 7XX, UK

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

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Welcome to Efalia ECM

In addition to the Efalia ECM WinClient, the Efalia ECM WebServer is an application to work with documents stored or to be stored in Efalia ECM Cabinets. Using the WebServer, not only standard tasks such as document scanning, import, retrieval and editing can be done.

In addition, the WebServer is used for advanced features such as process management.

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 filing 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. These 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 the Efalia ECM WebServer 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 these documents, provided the original application (e.g. Word) is installed. In regular document types, changes are always saved in revisions, i.e. the original version of the respective document is retained.

Requirements

Client

Efalia ECM WebServer gives access to your documents on the intranet or internet. Clients can access WebServer using one of the following browsers:

- Microsoft Edge
- Mozilla Firefox
- Google Chrome
- Opera
- Safari
- Any W3C compliant browser

Note

In order to use the full functionality of the Efalia ECM WebServer, it is recommended that you update your browser regularly.

This also generally serves the security of your system when using the Internet.

WebScan/WebMail

The WebScan/WebMail Clients are distributed to clients as ***ClickOnce*** solutions and are started directly from the web browser. The following requirements must be met:

- Latest Microsoft .Net Framework 4.x or higher

One of the following browsers:

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

Note

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

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.

Example

ClickOnce for Google Chrome - Chrome Web Store

Note

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Mozilla Firefox ClickOnce Solution

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

Example

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

Add the extension and restart the browser.

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Connection to the Server

Efalia ECM WebServer 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]/FileDirector/Web.

Depending on the set-up authentication method, either a login screen is displayed or you are logged in automatically.



Online/Offline

Unlike Efalia ECM WinClient, Efalia ECM WebServer does not provide an offline mode.

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 WebServer session will automatically log off and free the licence for another user. The user is informed about a log off. It is possible to specify more users in the Efalia ECM 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.

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. If you want to display such a 'page' of a document, this page will be converted to PDF for display in the Efalia ECM WebServer.

How can eDocs be displayed?

EDocs are converted to PDF for display in the Efalia ECM WebServer. 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 WebServer. 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.

Capture of electronic documents

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

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

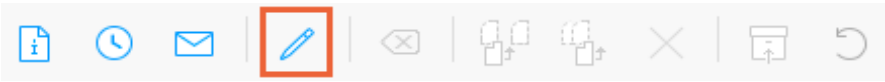
Append pages to existing documents

Pages can be attached 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 requirement is, of course, that the logged-in user has the corresponding permissions.

In order to add pages or files to an existing document, you must first perform a search and open the corresponding document.

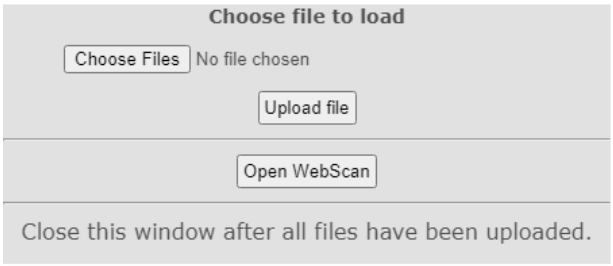


Now switch to the ***Edit*** mode in the ***Document*** tab via the corresponding icon in the control field.

Then select ***Append Pages***.



Now a window opens in which you can choose whether you want to attach a new file to the existing document via ***Upload*** or using the functionality of Efalia ECM ***WebScan***.



Insert pages into existing documents

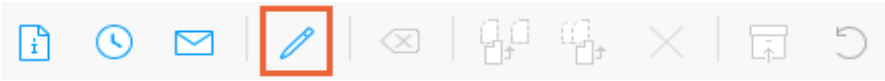
Pages can be inserted into any document in the Efalia ECM, except for documents that have ***Read only*** status. These documents have been checked out for editing by another user and can only be edited after they have been checked back in.

Note

A requirement is, of course, that the logged-in user has the corresponding permissions.

In order to be able to insert pages or files in an existing document, you must first perform a search and open the corresponding document.

Now switch to the ***Edit*** mode in the ***Document*** tab via the corresponding symbol in the control field.



Then select ***Insert Pages***.



Now a window opens in which you can select whether you want to attach a new file to the existing document or scan it via Efalia ECM WebScan.

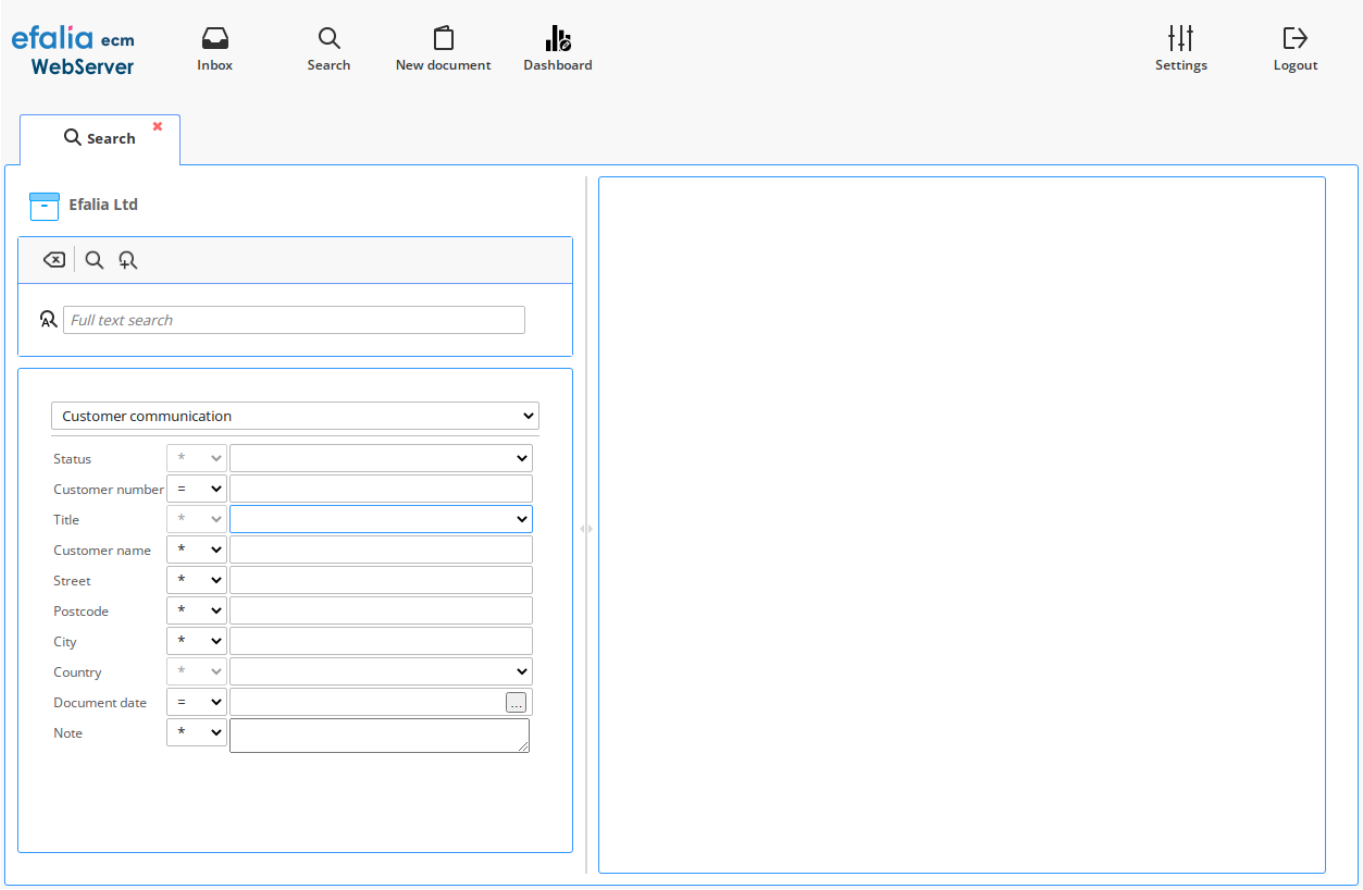
The selected file or the scanned pages are inserted above the selected and displayed page. It is not necessary to select the page by checkbox.

Note

Pages within EDocs can only be inserted if the document already consists of at least two EDocs.

The WebServer Desktop

When opened, the WebServer only shows a toolbar. On the left, you see three icons for the different working areas and on the right you see ***Settings*** and a ***Logout*** icon. The three different areas are ***Inbox***, ***Search***, ***New Document*** and ***Dashboard*** (administrative interface). When you select an area, the corresponding tab opens.



Note

For members of Efalia ECM licence group **fd-web**, the working areas **Inbox** and **New Document** are not visible.

Tabs

The control panel on the left-hand side of each tab is context-sensitive.

Inbox



When you select ***Inbox*** from the menu bar, the tab ***Inbox*** opens.

Within the tab ***Inbox*** you find all documents either sent to you through the Efalia ECM BusinessProcessManagement, an adhoc process or through the Efalia ECM WinClient feature ***Send to…user***.

Icon	Function
	Open cabinet
	Document Info
	Revisions

Search



When you select ***Search*** from the menu bar, the tab ***Search*** opens.

Within the tab ***Search*** you will find several search options such as ***Search***, ***Extended search***, ***Full text search*** and the fields connected to a selected document type are displayed.

Icon	Function
	Open Cabinet
	Clear index fields
	Search
	Extended search
	

New Document



When you select ***New Document*** from the menu bar, the tab ***Upload*** opens.

In the upper left section of the control panel, you select the cabinet. Below that, you select the document type and see the corresponding fields for indexing before checking in a new document from the local list.

Icon	Function
	Open cabinet

Note

Single files, **larger than 2GB** must be uploaded via **WebScan**.

Dashboard



When you select ***Dashboard*** from the menu bar, the administrative interface of Efalia ECM Dashboard opens. The button is inactive until a cabinet was selected using one of the other areas ***Inbox***, ***Search*** or ***New Document***.

Efalia ECM Dashboard is implemented into and directly connected to Efalia ECM WebServer. It can provide information about utilisations within Efalia ECM BusinessProcessManagement and about values, connected to existing entries in Efalia ECM fields. The information is provided in diagram format, whereas the format and the shown information is adaptable.

For further information, see also the separate Efalia ECM Dashboard Quick Guide.

Document lists

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

Hit list



The hit list contains all results of a search in Efalia ECM. The hit list is displayed after a search in a cabinet. In case the list is already displayed, it is updated when performing another search.

When the search is performed on a single document type, the hit list contains only documents of that document type. When the search is performed on all document types available for the logged-in user, the hit list is sorted by document type. You can switch between the document types of the hit list through a drop-down menu. The drop-down menu shows the name of the selected document type and in brackets, the number of hits within it.

The hit list 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 ***Document***.

Icon	Function
	No thumbnails
	Thumbnails
	Thumbnails only
	Select all pages
	Deselect pages
	Toggle selected pages
	First page
	Previous page
	Next page
	Last page

Icon	Function
	Delete
	View entire document
	Follow document link
	Save as…
	E-Mail

Full Text Search Results

When performing a full text search, the results will be displayed in the hit list of the ***Search*** tab. Each record shown in the list refers to a specific page of a document, for multi-page documents and the page number will be shown.

Additionally, a ranking 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 List (WebScan/New Documents)



The list Local Documents, known from Efalia ECM WinClient, is in Efalia ECM WebServer the tab ***Upload*** and its list, located on bottom of the right part of the tab.

This list contains documents, created within the active browser session. These documents are either created by using option ***Add*** or ***WebScan***.

Note

Documents, shown within the tab New Documents are neither stored nor uploaded to Efalia ECM when the user logs out from Efalia ECM WebServer, the browser or the browser tab is being closed.

Inbox



The Inbox is shown in a separate tab within Efalia ECM WebServer.

This list provides documents, sent by other users of Efalia ECM, an Efalia ECM ad hoc process or by Efalia ECM BusinessProcessManagement, when the logged in user is defined within a user action step.

Document viewer

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

If not changed within the configuration file of Efalia ECM WebServer, only eDocs are temporarily converted to PDF for display purposes.

The settings within the ***web.config*** of Efalia ECM WebServer are global settings and should only be changed by a trained administrator of Efalia ECM.

C:\Programs\Efalia GmbH\Efalia ECM ConfigUtility Web

or

C:\Programs (x86)\ Efalia GmbH\Efalia ECM ConfigUtility Web

Note

The default path of Efalia ECM WebServer configuration file **web.config** is located on the Efalia ECM server.

First Steps

Open a Cabinet

After the log-in, you see the toolbar of Efalia ECM WebServer.

Selecting either ***Inbox***, ***Search***, ***New Document*** opens the corresponding tab in Efalia ECM WebServer.

The cabinet is selected within the tab.

Open Cabinet Manually

You can switch the cabinets, manually. Select a cabinet within the control box of the active tab and choose a cabinet from the displayed list.

Icon	Function
	Select cabinet

Document Type Views

Using Views, allows to configure individual settings for users or groups regarding the way fields are displayed within the control box on the left-hand side of the tab or on the hitlist. A user with administrative rights in Efalia ECM Enterprise Manager on the corresponding cabinet can do that configuration.

Views can be used to define which fields of a document type are displayed and in what order. In addition, group separators and separators can be used to group the fields displayed in the control box.

Open Document Lists

The different document lists are context sensitive.

Search Results List

The list of Search results is displayed after a successful search operation on the server has been performed. If the Search Results list was already open, it is automatically refreshed. The Search Results can only be displayed when the WinClient is connected to the Efalia ECM server.

Note

A setting on the server limits the maximum number of documents to be returned to the Search Results list to 1000 entries.

This default value can be changed by an administrator

Local Document List

The list of local documents is only available in the tab ***Upload***, selecting the area ***New document***. Newly created documents are automatically added to this list.

Inbox

When you select the corresponding working area from the toolbar, the tab ***Inbox*** opens and, if documents are available for you, shows these documents on a list

For each document the document status is displayed giving a quick overview, which documents are available and which documents have been checked out by other users or the current user.

For each document on the list an action can be specified by process management. This can be a task, such as Approve/Reject, Comment or View. This task must be carried out by the relevant user for a document to move to the next process step.

The specified action is shown at the start of each line as well as the index values, by whom and when a document was sent to you and the number of pages.

Documents are displayed by double clicking on the relevant list record.

Closing Working Areas

Each of the tabs be closed by pressing the ***X***, top right of the tab.

Search in Cabinets

Select ***Search*** from the toolbar and the tab ***Search*** opens.

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.

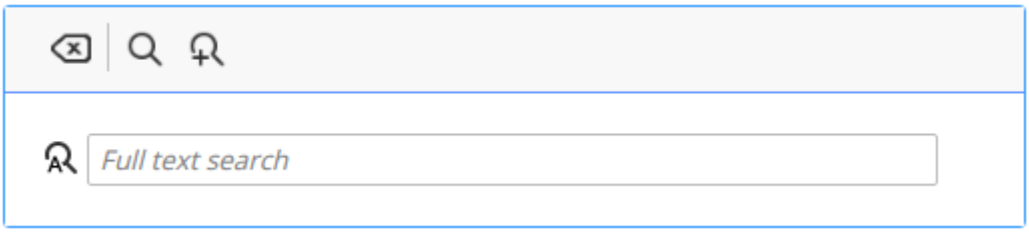
Documents can be searched for using the index data entered against each document, or by searching the content of the documents themselves by using full text search. For full text search, the OCR Server option is required, and must be configured to OCR the relevant Document Types.

Note

A setting on the server limits the maximum number of documents to be returned to the Search Results list to 1000 entries.

This default value can be changed by an administrator

Search tools



In the upper left area, the cabinet can be selected. Below, the search tools are located.

Icon	Function
	Clear index fields
	Search
	Extended search

Icon	Function
	

Clear index fields

This tool will clear any information shown within the index fields. This option always clears the entries of all index fields, shown below the search tools, at once.

Using this tool within the ***Search*** tab, it does not edit a documents index data.

Document Type Search

This performs a search within the selected Document Type, using the information entered into the index fields.

Extended Search/Cabinet Search

This performs a search across all the Document Types the user has rights to, using the data entered into the common index fields.

Full Text Search



Searching for documents by their content can be performed by selecting the ***Full text Search*** tool. After entering the relevant word or phrase, the search can be performed within the selected Document Type, across all Document Types the user has rights to by selecting the appropriate tool available above the Full Text Search data entry field.

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.

Search Parameter

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

Parameter	Description
*	Wildcard search
=	Exact match
>	Greater than value specified
>=	Greater or equal value specified
<	Smaller than value specified
<=	Smaller or equal value specified
()	Empty value search
<>()	Search for all documents with index field filled
.--.	Range search With this option two values have to be specified, a lower and an upper limitation for the range.
<>	Not equal search

Search using index fields

To search in a Cabinet, using index fields, select ***Search*** from the top bar, then specify the cabinet and the document type within the search tab and enter the search criteria and if appropriate, set the search parameter.

Click the ***Search*** button to perform the search within the selected document type or the ***Extended Search*** button in order to perform a comprehensive search over all document types.

The number of documents found and listed in the Search Results list depends on the search criteria entered.

Example

A user searches with a unique document number (e.g. invoice number); only one document will be found and displayed.

If the search parameter is changed to ***Greater or equal***, all documents with numbers greater than the value specified will be listed.

Search using OR Combinations

OR function:

If you are unsure how an index has been entered into an index field the search can be performed with an OR combination. A search performed with ***Grey OR Gray***, will return all documents containing the word ***Grey*** or ***Gray*** in the selected index field.

Example

A document has been filed under the name ***Grey***. If you are not sure how the name is spelled, you can enter several possibilities, such as:

Grey OR Gray OR Graye

Wildcard Searching

The search parameters which can be set in the drop down list in front of the index fields can be used as input assistance. Searching with wildcards such as an asterisk * is also possible.

Example

A search using ***Mi*** will not return ***Smith***, it will only return all documents beginning with ***Mi.*** In order to have ***Smith*** returned, the search must be performed with ****Mi*** or ***Smi****

The asterisk can be used in the middle of a word – e.g. when searching ***Me*er*** all names including ***Meyer*** and ***Meier*** are listed.

Note

Using an asterisk * as a wildcard is only valid when SQL server 2000 or above is used as database server Using Oracle, a % character must be used for wildcard searches.

Full Text Search

The content of documents can be searched in order to retrieve a document which contains certain words or phrases. This can only be performed when the documents have been processed using the optional Efalia ECM OCR Server module, which can be configured to process selected Document Types. Depending on the configuration, the full text information is only available for retrieval after a scheduled process has added the full text information to the database.

To perform a full text search, select Search from the toolbar. Enter the word or phrase you are searching for into the full text field above the index field and select the search icon in front of the full text search field. The full text search is an extended search and performed on all available document types of a cabinet.

Working with search results

The list of Search results is displayed after a successful search operation on the server has been performed. If the Search Results list was already open, it is automatically refreshed. The Search Results can only be displayed when the WinClient is connected to the Efalia ECM server.

Note

A setting on the server limits the maximum number of documents to be returned to the Search Results list to **1000** entries.

This default value can be changed by an administrator.

Display of the hit list

The hit list in Efalia ECM WebServer provides thumbnails for the selected document.

The thumbnails can be deactivated in the toolbar shown above the list. This increases the maximum displayed width to provide more index information for each document on the list.

The following options are available:

Icon	Function	Icon	Function
	No thumbnails		Thumbnails
	Thumbnails only		

Switch document type (Extended search)

When performing an ***Extended search***, the results can be in several different document types.

A drop-down menu allows to switch between the different document types. The drop-down menu contains the name of the found document types and, in brackets, the number of hits within this document type.

Example



In this case are four hits in document type ***Order confirmation***.

Note

The results contain only hits of document types and documents, the logged in user has rights to.

Document display

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

When a document is selected by a double click on the hit list, the name of the tab depends on the index value, the double click was performed on.

Using the icon ***View entire document***, the tab is always labelled ***Document***.

Icon	Function
	View entire document

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.

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.

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 (for example: 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.

Select Documents/Pages

The hit list in Efalia ECM WebServer provides thumbnails for the selected document with checkboxes for each page. Hereby documents or individual pages can be selected for the features ***Save as…*** or ***Email***.

Icon	Function	Icon	Function
	Save as…		Email

All documents in a hit list can be selected by a single click on the checkbox in the title bar of the search result list.

Through the icons either all pages of a selected document can be ticked off, the page selection can be cleared or the selection can be toggled.

Icon	Function	Icon	Function
	Select all pages		Deselect all pages
	Toggle selected pages		

Entire Documents

For the selection of one or multiple documents including all pages, tick the corresponding checkbox or checkboxes on the left-hand side of the hitlist.

Note

Only documents, stored within the same document type can be selected.

Selected Pages

For the selection of individual pages of one or multiple documents, the ***Thumbnails*** must be enabled for the hitlist.

Icon	Function	Icon	Function
	Thumbnails		

After that, the thumbnails and a checkbox below each thumbnail of the currently selected document are displayed on the left-hand side of the hitlist. By ticking the corresponding checkbox, a page is selected. It is also possible, selecting individual pages of multiple documents.

Icon	Function	Icon	Function
	Select all pages		Deselect all pages
	Toggle selected pages		

Note

Only pages of documents, stored within the same document type can be selected.

In case of multipage EDocs, only a thumbnail of the first page is displayed. It is not possible to select individual pages.

Create New Document

After selecting ***New Document*** from the Efalia ECM WebServer toolbar, a new tab ***Upload*** opens which contains the following context-sensitive toolbar:

Icon	Function	Icon	Function
	New Document		Add
	Open WebScan		Delete page
	Check-in		

New documents are either created by the ***Upload*** toolbar icon ***Add*** or ***Open WebScan***.

Create New Documents: File Size over 2GB

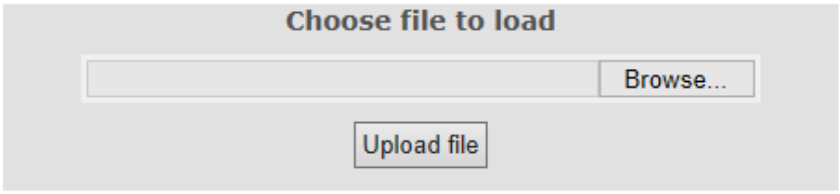
Creating new documents with a file size over 2 GB is only possible with a directory scanner using the ***WebScan*** function.

Create New Documents: Add

Through ***Add*** files are uploaded from the file system and stored in Efalia ECM.

The upload of the elements is realised through a pop-up window. The browse button opens a window where you can select the file or files you want to upload.

Afterwards the selected files are uploaded by ***Upload file*** to the local list of Efalia ECM WebServer



When the action is repeated, the next file is added to the previously uploaded files. For each added EDoc another thumbnail is generated for the document.

When a document is completed and another document should be added to the local list, you have to select ***New Document*** from the toolbar of this tab to close the previous document and open a new one.

Note

The maximum file size for the upload via **New Document: Add** is **2GB** per file.

Create New Documents: Open WebScan

Through the option ***Open WebScan***, new documents can be created by scanning either with previously, in Efalia ECM Enterprise Manager, set up scan profiles or local scan profiles

Efalia ECM WebScan opens in a separate window.

Document Display

About Documents

A document within Efalia ECM is either a one page or a multipage document. One page of a document can be either a scanned page or an electronic format document, such as an MS Word or Excel file, or a PDF file

The display options in Efalia ECM WebServer are powerful. TIFF and JPEG image formats are displayed in the original by default, eDocs are temporarily converted to PDF format for display in the WebServer by default.

A single Efalia ECM document can contain different formats, for example a scanned page and a Word document.

Each proprietary document format or electronic document is displayed in Efalia ECM as one page of a document, even if it contains many pages within itself.

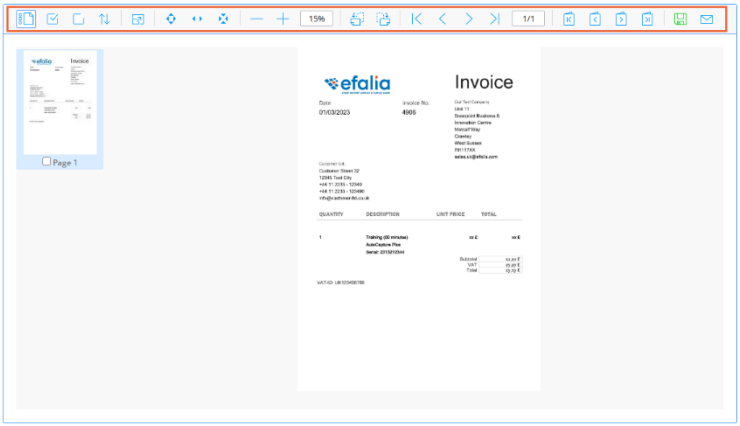
Different Viewers

It is quite simple to check whether a document is displayed in its original format or using the PDF viewer.

The respective options use different toolbars.

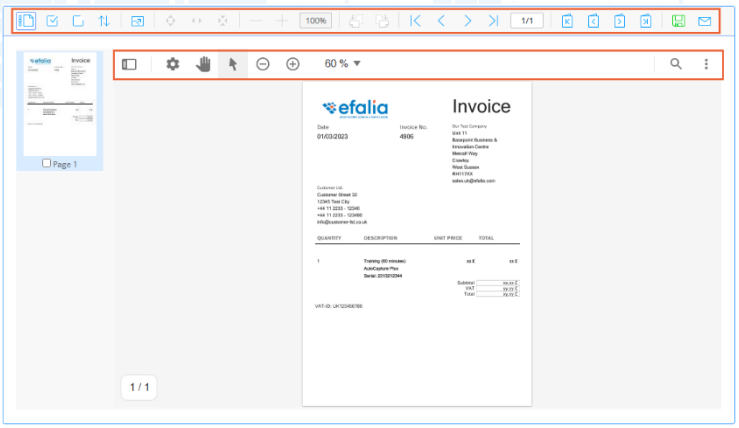
TIFF/JPEG/Not Converted

Only a single toolbar is displayed above the document.



PDF-Format/Converted to PDF

Two toolbars are displayed above the document.



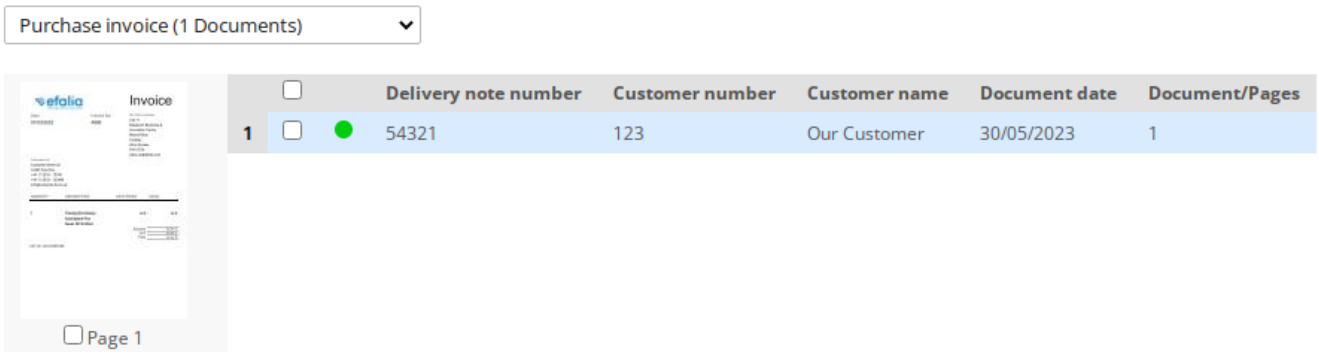
Open and display multiple documents

Efalia ECM WebServer can display multiple documents in separated tabs.

After running a search within the ***Search*** tab and selecting a document from the hit list, each selected document is displayed in a separate, new tab.

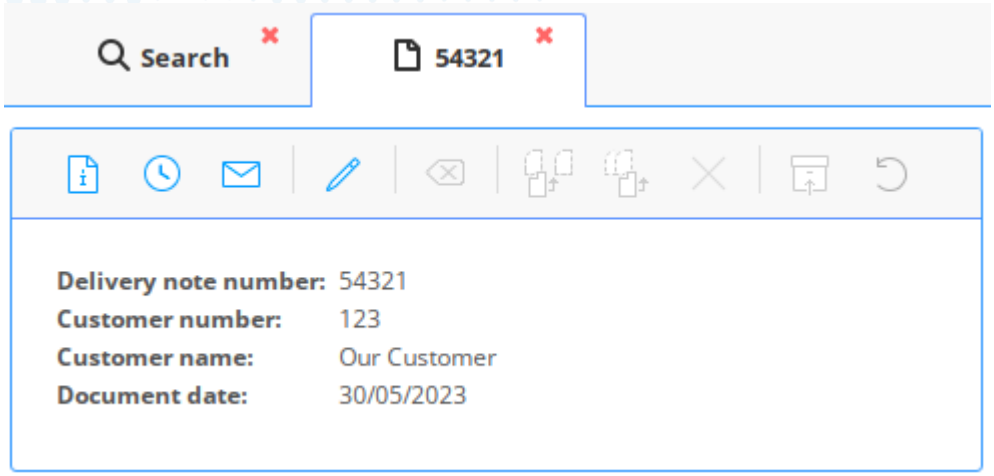
The tab name depends on the value selected from the search result list.

Example

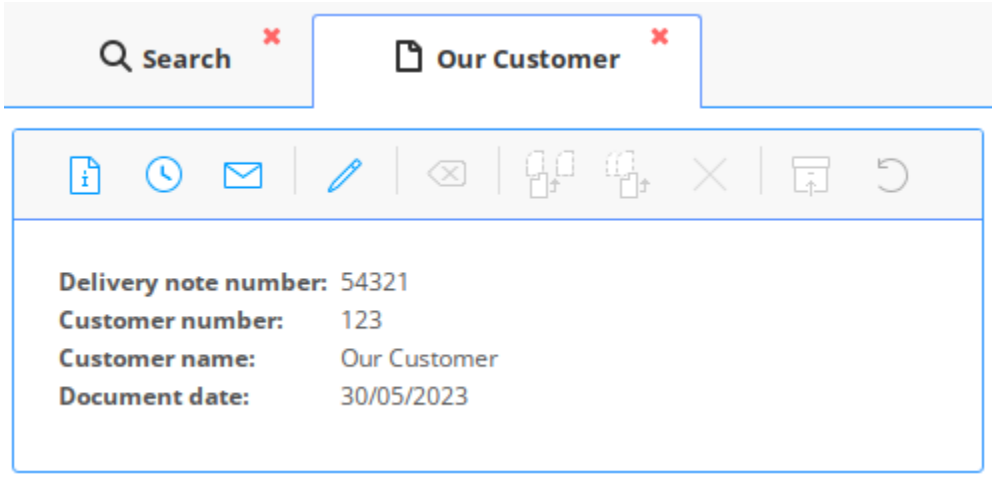


The Delivery note number was selected, the tab is labelled 54321:

Example



The customer name was selected, the tab is labelled Our Customer:



Toolbar (TIFF/JPEG/Not Converted)



When opening a document (TIFF/JPEG or not converted to PDF) for display, the default setting shows the thumbnails of the pages and the first page. There are other views to choose from.

Icon	Function	Icon	Function
	Toggle thumbnails on/off		Select all pages
	Deselect all pages		Toggle selected pages
	Full screen		Fit all
	Fit width		Original size
	Zoom out		Zoom in
14%	Zoom factor in percentage		Rotate left
	Rotate right		First page
	Previous page		Next page
	Last page	1/2	Current page
	First document (on the hit list)		Previous document
	Next document		Last document (on the hit list)
	Save as...		E-Mail

Page Display Tools

The display of a document within the document tab, can be changed, for example by zoom and rotation. The display tools are available on the toolbars

Some or all of the display tools may not be available when displaying electronic documents.

Toggle thumbnails



The button Thumbnails allows to toggle the thumbnails of the displayed document on or off.

It can be easily scrolled through the thumbnails of a document by using a mouse wheel.

Below each thumbnail, a checkbox is displayed. One or several pages can be selected through this checkboxes e.g. to attach the selected pages to an email.

Display whole page in the image display window



Select ***Fit all*** on the toolbar to display the whole page within the display area.

Fit width of page to the document display window



Select ***Fit width*** on the toolbar to fit the width of the document to the size of the display window.

Display page in original size



Select Original size on the toolbar to display the document at its maximum size zoom level. When displaying TIFF or JPEG files, each pixel of the image is displayed as one screen pixel.

Zoom in



This tool will increase the zoom factor, making the displayed document larger.

Zoom out

This tool will decrease the zoom factor, making the displayed document smaller.

Rotate page 90° counter clockwise



Selecting ***Rotate left*** will rotate the displayed page 90° counter clockwise based on the current view. This is also selectable by right-clicking on the document display window.

Rotate page 90° clockwise



Selecting ***Rotate right*** will rotate the displayed page 90° clockwise based on the current view. This is also selectable by right-clicking on the document display window.

Maximize document viewing area

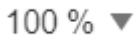


With this option, the page can be displayed in a new browser tab. This tab does not contain the toolbar of Efalia ECM WebServer to maximize the document viewing area. The index information is still visible.

Toolbar (PDF Documents/Converted to PDF)



When opening a document (TIFF/JPEG or not converted to PDF) for display, the default setting shows the thumbnails of the pages and the first page. There are other views to choose from.

Icon	Function	Icon	Function
	Panel		View controls
	Pan		Select
	Zoom out (***Ctrl -***)		Zoom in (***Ctrl +***)
	Zoom (Fit to width, Fit to page, Marquee Zoom)		
	Search		Full screen, Download, Print

Page Display Tools

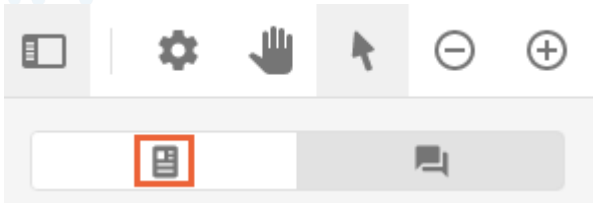


The display of a document within the document tab, can be changed, for example by zoom and rotation.

The corresponding options can be accessed via ***View controls*** options.

The option to switch to ***Full screen*** mode can be found within the Menu.

Toggle thumbnails



Using the button ***Panel***, it is possible to toggle the thumbnails of the displayed document on or off.

It can be easily scrolled through the thumbnails of a document by using a mouse wheel.

Below each thumbnail, a checkbox is displayed. One or several pages can be selected through ***Ctrl+Left Mouse button***.

Page transition

Icon	Description
	For multi-page documents, the option ***Page by page*** shows only the current page, regardless of the selected zoom.
	For multi-page documents, the option ***Continuous*** displays all or part of several pages of a document, depending on the zoom selected.

Layout

Icon	Description
	The option ***Single*** always shows only the currently selected page for multi-page documents.
	The option ***Double*** displays the current and the following page next to each other for multi-page documents.
	Cover

Select ***Single Double Cover width*** on the toolbar to fit the width of the document to the size of the display window.

Rotate

Icon	Description
	Selecting ***Counterclockwise*** will rotate the displayed page 90° to the left, based on the current view.
	Selecting ***Clockwise*** will rotate the displayed page 90° to the right, based on the current view.

Zoom in



This tool will increase the zoom factor, making the displayed document larger.

Zoom out



This tool will decrease the zoom factor, making the displayed document smaller.

Maximize document viewing area



With this option, the page can be displayed in a new browser tab. This tab does not contain the toolbar of Efalia ECM WebServer to maximize the document viewing area. The index information is still visible.

Full screen

You will find the option to switch to ***Full screen*** mode under the ***Menu***.

Here the entire area of the screen is used for the ***display*** and the ***toolbar***.

Search Using Index Fields

To search using index fields in a Cabinet, select the ***Search*** tab in the control panel, then specify the document type and enter the search criteria and if appropriate, set the search parameter.

Click the ***Search*** button to perform the search within the selected document type or the ***Extended Search*** button in order to perform a comprehensive search over all document types.

The number of documents found and listed in the Search Results list depends on the search criteria entered. If for example, the user searches with a unique document number (e.g. invoice number); only one document will be found and displayed.

If the search parameter is changed to ***Greater or equal***, all documents with numbers greater than the value specified will be listed.

Search Parameters

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

Parameter	Description
*	Wildcard search
=	Exact match
>	Greater than value specified
>=	Greater or equal value specified
<	Smaller than value specified
<=	Smaller or equal value specified
()	Empty value search
<>()	Search for all documents with index field filled
.--.	Range search With this option two values have to be specified, a lower and an upper limitation for the range.
<>	Not equal search

Search using OR Combinations

OR function:

If you are unsure how an index has been entered into an index field the search can be performed with an OR combination. A search performed with ***Grey OR Gray***, will return all documents containing the word *Grey* or *Gray in the selected index field*.

Example

A document has been filed under the name ***Grey***. If you are not sure how the name is spelled, you can enter several possibilities, such as:

Grey OR Gray OR Graye

Wildcard Searching

The search parameters which can be set in the drop down list in front of the index fields can be used as input assistance. Searching with wildcards such as an asterisk * is also possible.

Example

A search using ***Mi*** will not return ***Smith***, it will only return all documents beginning with ***Mi.*** In order to have ***Smith*** returned, the search must be performed with ****Mi*** or ***Smi****

The asterisk can be used in the middle of a word – e.g. when searching ***Me*er*** all names including ***Meyer*** and ***Meier*** are listed.

Note

Using an asterisk * as a wildcard is only valid when SQL server 2000 or above is used as database server Using Oracle, a % character must be used for wildcard searches.

Search in inverted commas

To ensure that a search in the WinClient or WebServer is always performed with quotes around the search text, the following entry can be added to the Efalia ECM server web.config ("0" = off, "1" = on):

```
<add key="FDServer.SetQuotedIndexSearch" value="1" />
```

Note

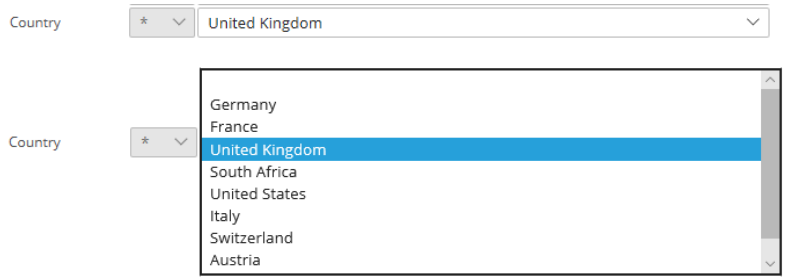
This can only be carried out by a user with administrative privileges to the Efalia ECM Server.

Keyword lists

When an index field has been set to use keywords the keyword list entries can be selected directly.

Fields, configured as keyword list are displayed with a drop-down icon at the end.

Example

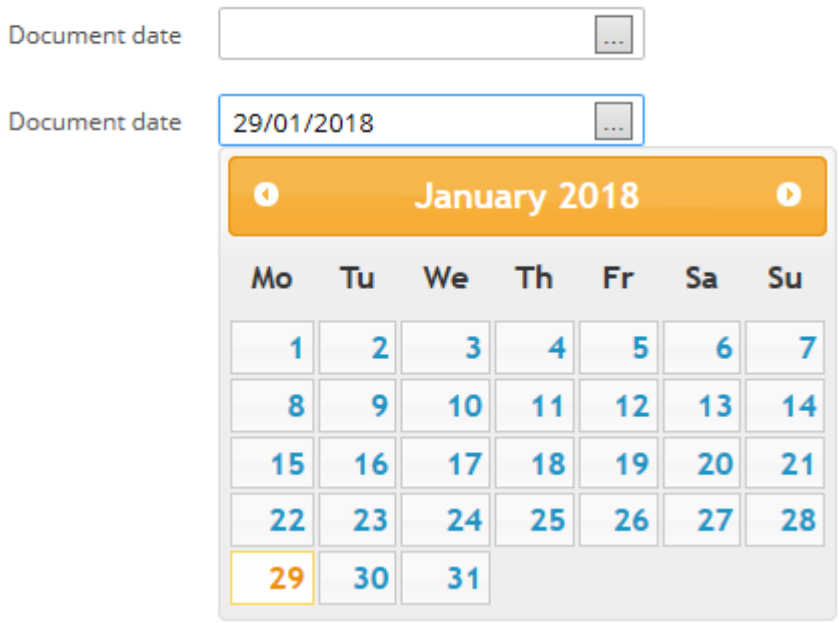


Date entry

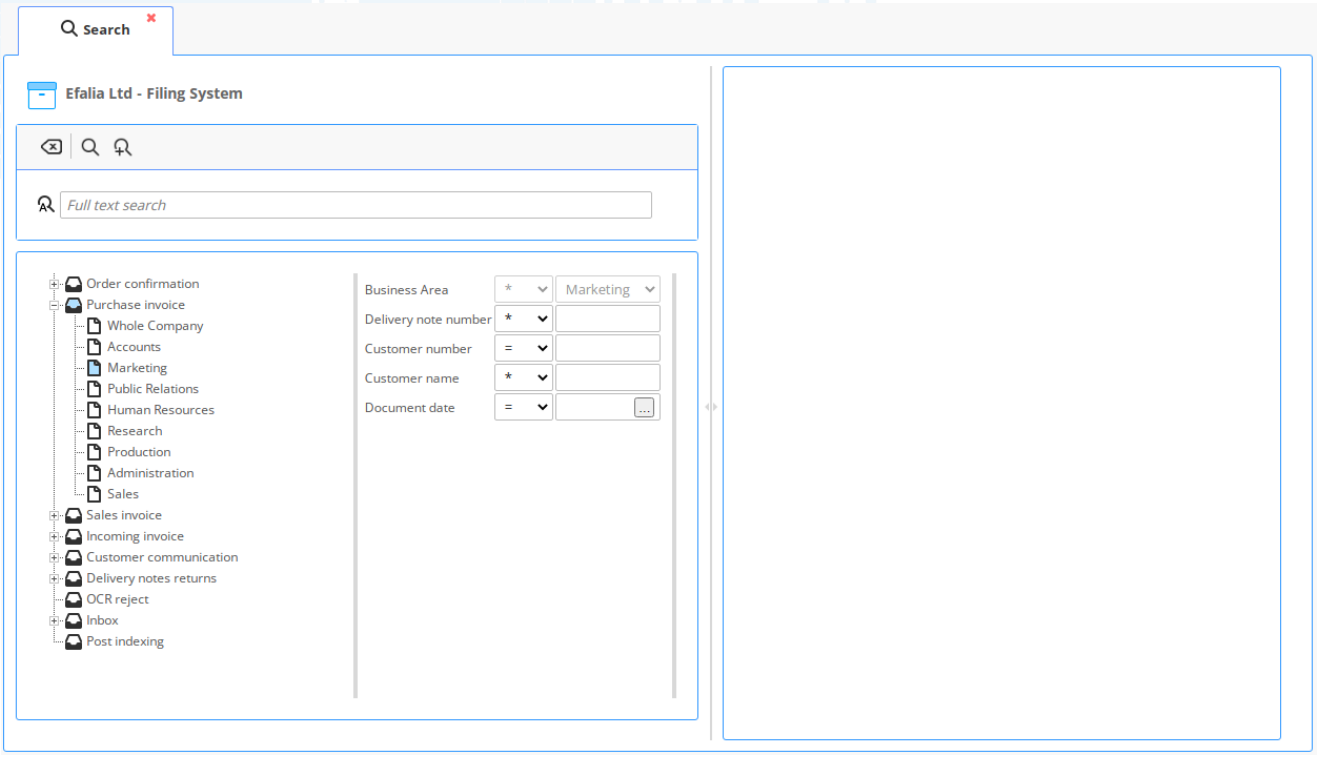
When a date is to be entered into a field, configured as date field, a calendar opens next to the index field and the relevant date can be selected.

The Calendar can be displayed by clicking on the icon at the end of the date field.

Example

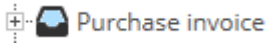


Filing System Search

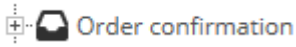


When the Cabinet has been configured to use the Filing System, the document types and selected index fields are displayed in a tree structure. Searches within the ***Search*** tab can be performed by selecting a tree node and selecting ***Search***If the node has sub-nodes, these will be included in the search by default. Setting the Explorer-like search option will restrict the search to the selected node only.

Document type selected



Document type not selected



Full Text Search



Searching for documents by their content can be performed by selecting the ***Full text Search*** tool. After entering the relevant word or phrase, the search is performed within across all Document Types the user has rights to by selecting the appropriate tool, available to the left of the Full Text Search data entry field.

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.

Full Text Search

The content of documents can be searched in order to retrieve a document which contains certain words or phrases. This can only be performed when the documents have been processed using the optional Efalia ECM OCR Server module, which can be configured to process selected Document Types. Depending on the configuration, the full text information is only available for retrieval after a scheduled process has added the full text information to the database.

To perform a full text search, select ***Search*** in the control panel. Select the Document Type and activate the text field, which is used to enter search information by selecting the ***Full text search*** tool. To start full text search enter the word(s) and perform the search by clicking the tool to the right of the field.

Searching multiple words using AND, OR, OR NOT

When you search for multiple words you need to connect the entries in the search field.

AND - function:

When entering ***Robert AND Mueller*** in the full text search field, all pages are found containing BOTH terms.

OR function:

If invoices and credit notes are stored in a Document Type, searching for ***invoice OR credit***, will return all documents containing the word *invoice* or *credit*.

OR NOT function:

When looking up an. ***invoice OR NOT Mueller***, all *invoices* are listed NOT containing the name *Mueller*.

Check-In and Check-Out

New documents, created with Efalia ECM WebServer, are stored temporarily and locally within the active browser session on the workstation and shown in the list of the ***Upload*** tab.

They are not available for other users until they have been checked-in to the Efalia ECM server. Once checked-in, the document is stored in the cabinet and is available for retrieval by other users.

When a document, which is stored in a Cabinet, is edited it is checked out for a short time. Efalia ECM ensures that only the user who has checked-out the document can change it; however, a checked out document can be viewed by other users. Each change of a document is only stored in the Cabinet and available for other users when the document is checked-in again after the changes have been made.

Check In documents



Documents, created with Efalia ECM ***WebScan*** or the option ***Add*** are stored locally on the workstation and are not stored in the Efalia ECM cabinet yet. They are shown on a list within the tab ***Upload***.

Select ***Check-In*** to upload the selected document to Efalia ECM server. The icon is on the toolbar within the ***Upload*** tab.

When checking-in, the document is sent to the Efalia ECM server, where it is then available for retrieval by other users.

Mandatory fields during check-in

When mandatory fields have been specified, the index must match the field properties before the document can be checked-in. There are several types of mandatory fields.

Empty not allowed

Document cannot be checked in, if field is empty. In the Upload status display of the Windows Client, an error message will appear and indicate which field must not be empty.

Must be full

If this option is set, all characters of the specified length must be entered. If the index entered does not meet the specified requirements, an error message appears in the ***Upload*** status.

Date

The value entered into the field must be a valid date when this option is selected.

Date (not in future)

The value entered into the field must be a valid date, and must be the current or past date when this option is selected

Checksum algorithms

Checksums with different algorithms can be specified for specific requirements. The following checksums are supported:

Checksum ***ISBN***, ***EAN-13***, ***Mod2***, ***Mod10***, ***Mod11***, ***Mod11.1***, ***Mod11.2***, ***11-Check***, ***CPF*** and ***CNPJ***.

When data is entered into this field, the content is checked using the relevant algorithm and is either accepted or rejected.

IBAN

The International Bank Account Number (IBAN) is an internationally agreed system of identifying bank accounts across national borders to facilitate the communication and processing of cross border transactions with a reduced risk of transcription errors.

When data is entered into a field set for IBAN, the content is checked and is either accepted or rejected

If a document is not checked-in due to mandatory field settings, an appropriate hint about the incorrect index appears in a pop-up window.

Protected fields

Protected fields cannot be changed. They are greyed out and inactive in WebServer after a document has been checked-in. A date field with an automatic date setting, for example, can always be protected. A manual entry of index can be protected after check-in so that the index cannot subsequently be changed. The configuration of protected fields is carried out by an administrator user in Efalia ECM Enterprise Manager.

Example



In this case, the Efalia ECM field Customer number is protected In Revision.

A customer number was entered when creating the document and uploading it. Now, the value can't be changed when editing the document.

Revisions

All changes on documents in Efalia ECM are by default stored as revisions. It is not possible to perform a change to a document without storing the changes as revisions, unless a document type has been configured in Efalia ECM Enterprise Manager by an administrator to disable revisions.

How is a revision stored?

In revisions of scanned documents which are stored as *.tif or *.jpg files only the changes, not the complete document is stored as revision. If pages are appended, they are stored as additional *.tif or *.jpg files.

When electronic documents are changed they are stored as a complete copy of the document.

Display Revisions



The displaying of revisions is protected and has to be granted as a right. To display the revisions click the ***Revisions*** icon, which is shown on the left-hand side of the documents tab.

From the pop-up window, you can select and display the different revision in order to recall the document changes. Changes to the document indexing are also stored as a revision.

Note

If a previous revision of a document is displayed, the number of the revision is shown in brackets in the tab.

Revisions

#	Pages	Size	Created by	Created on	Modification
2	1	527,04 KB	demo\admin	24.01.2019	Index
1	1	527,04 KB	demo\admin	29.08.2018	unknown

Change Revision/ Check out

Only the most recent revision can be changed.

Even if a user selects an older revision from the list and edits the index values of this revision, the changes are stored as a new revision and the values of the selected, older revision are not changed.

Delete Revisions

Revisions can't be deleted.

Print Revisions

If documents are converted to PDF for display within the Efalia ECM WebServer, the print functionality is available within the WebServer. First select the desired revision. To print individual pages, select them accordingly under Print.

Document Editing

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

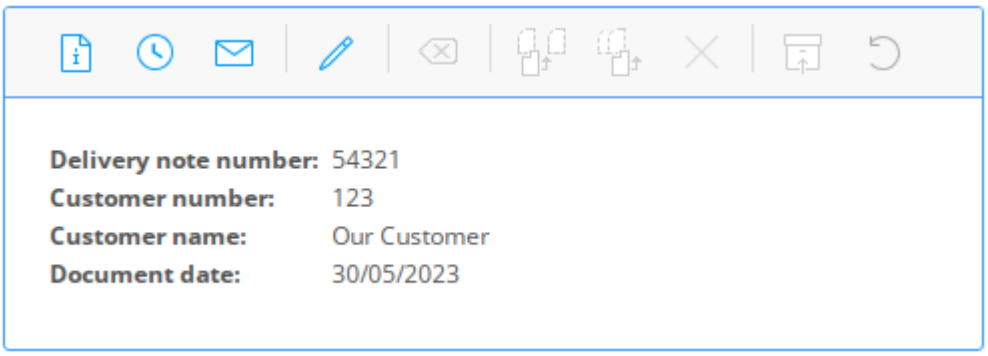
The index information associated with a document can be added and changed and single pages of a document can be deleted or whole documents can be marked as deleted.

Editing Document Index Data

Index information stored with a document, can be added or edited at any time, provided that the document is not checked-out by another user. The relevant user must have rights to modify documents.

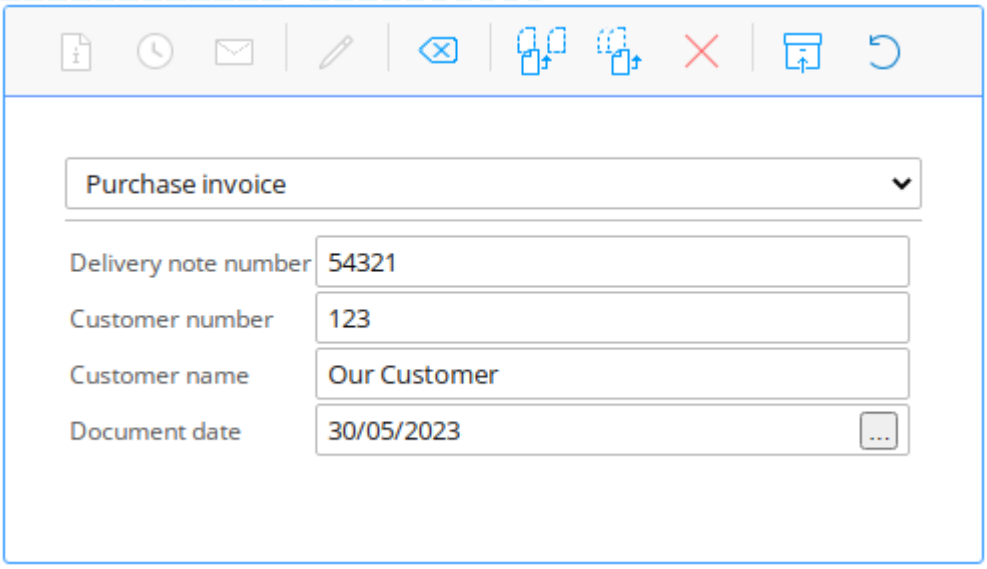
Select the document to be edited in the document list.

The editing of index data is carried out using the ***Control panel*** of the respective document tab, which displays the index information for the current document.



Select ***Edit*** in the control panel of the corresponding document tab. Select the document type. The index fields relevant for the document type are displayed. New index data can be entered into the fields or existing index data can be changed.

Only the index fields of the document type, selected in the drop-down menu, are available for editing.



Check-in edited documents

Click on the ***Check-In*** tool in order to carry out the changes.

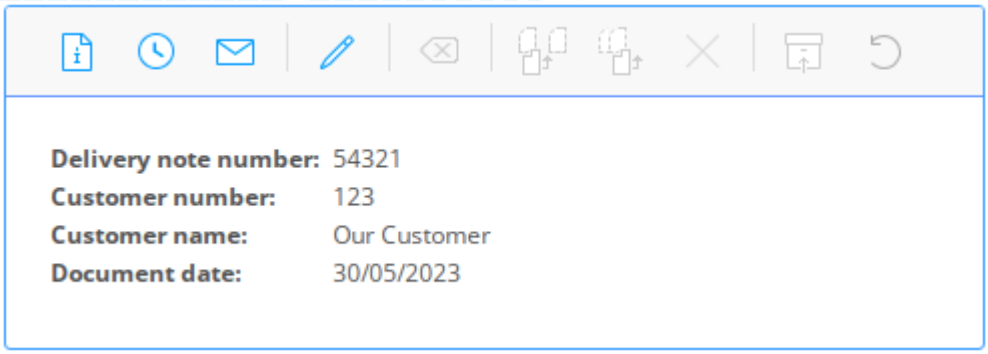
Each change of a document, which has been already checked-in to a document type, is stored as a revision, unless the document type has been configured in Efalia ECM Enterprise Manager using the option ***Disable revisions***.

Cancel

Click on the ***Cancel*** tool in order to discard all changes.

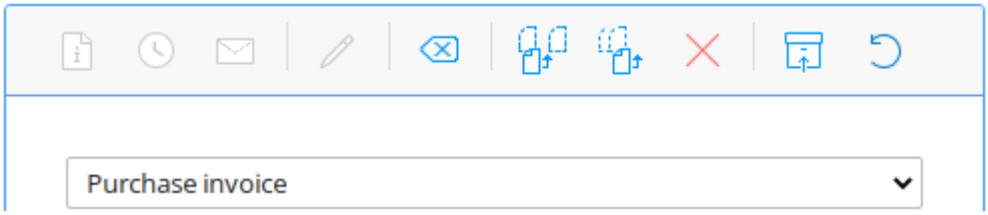
Moving Document between Document Types

Select the document from the document list.

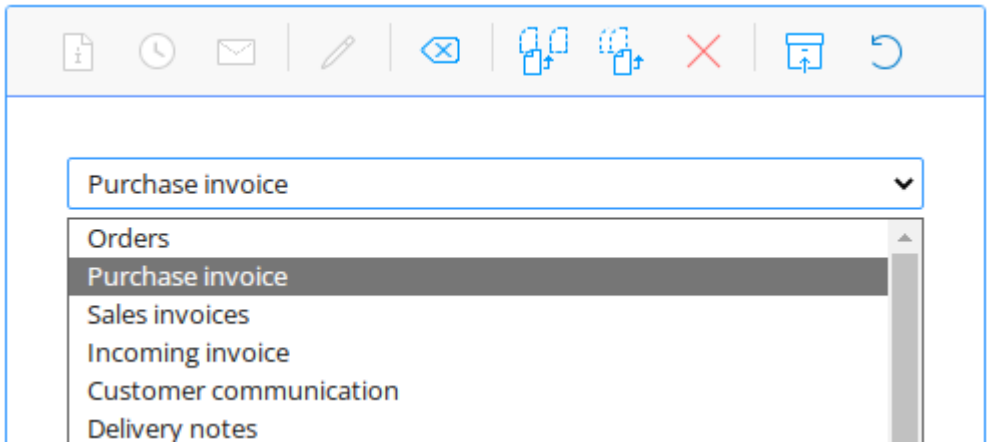


Select ***Edit*** in the control panel of the corresponding document tab.

Select the new target document type from the drop-down menu, displayed above the index fields.



The current document type is marked blue and the selected target document type is marked grey, when scrolling through the list.



After selecting the new target document type, the process must be finished by a Check-in.

See also: Check-in edited documents.

Delete Documents and Pages

Individual pages of document can be deleted or complete documents can be marked as deleted.

Delete single pages of a document

Open the document with a double click on the hit list of the Search tab. Select ***Edit*** from the control box of the ***Document*** tab. Select the checkbox, on the right-hand side, under the thumbnail of the page you want to delete and select ***Delete pages*** from the control box.

Delete documents from server

If a document with a status of ***Archived*** is deleted from the ***Search*** list, the document is marked as deleted by the Efalia ECM Server, and will not be returned in any searches. Documents with a status of ***Read only*** are checked out by another user and can't be deleted.

Select the checkbox of the documents to be deleted on the hit list of the Search tab and click on ***Delete*** on the toolbar.

Undelete Documents (WinClient only)

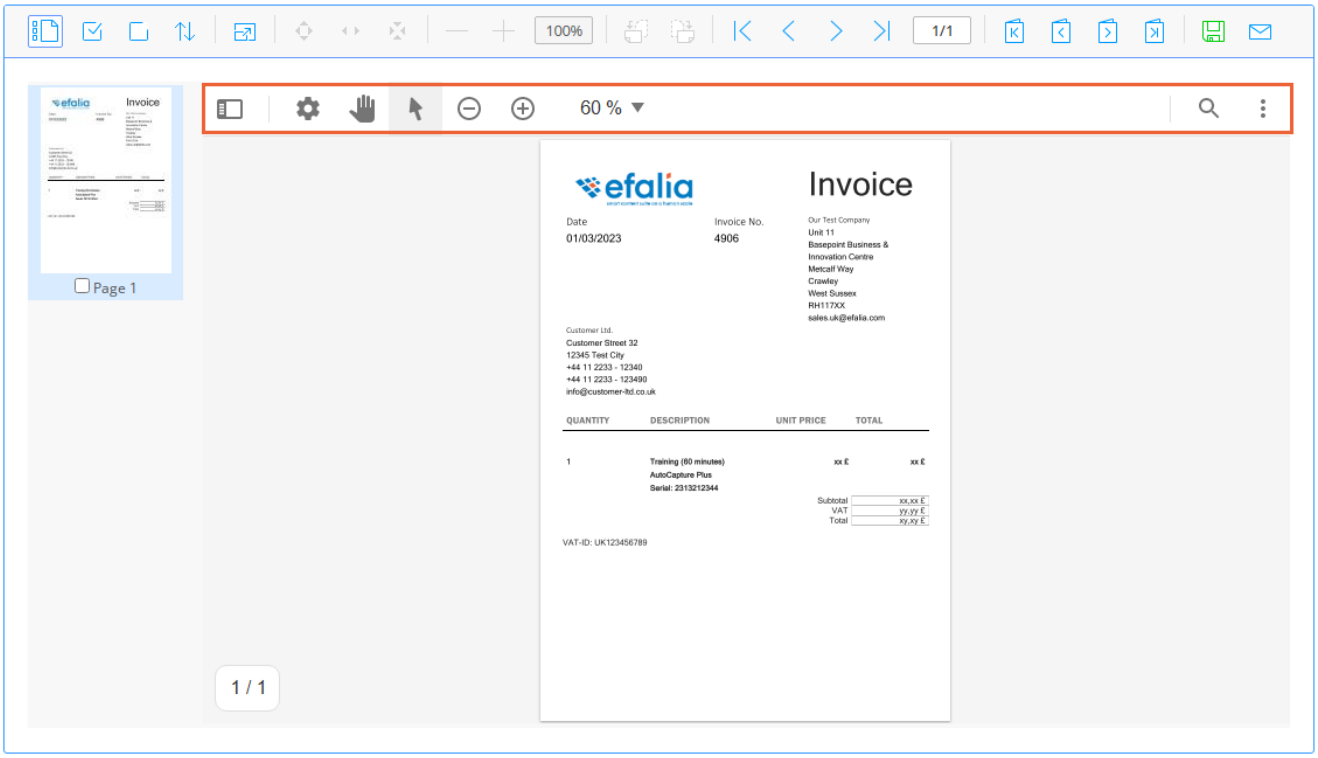
If a document has been deleted, a flag is set in the database, marking the document as deleted. Deleted documents can only be shown in Efalia ECM WinClient, using ***Info Search***.

Annotations

Annotations can be added to ***.PDF** pages of a document. These annotations do not change the original document and are displayed as an overlay of the original image.

When annotations are added to a page, the document is treated as if it is revised. After adding annotations to a page a document can be checked-in to the cabinet again, creating a new revision.

Changing annotations is only allowed when the specific right is set. In this way for example text parts of pages can be hidden by putting a white or black area over them which cannot be moved by certain other users.



Note

The toolbars shown below are only displayed for PDF documents.

PDF Toolbar (View Mode)



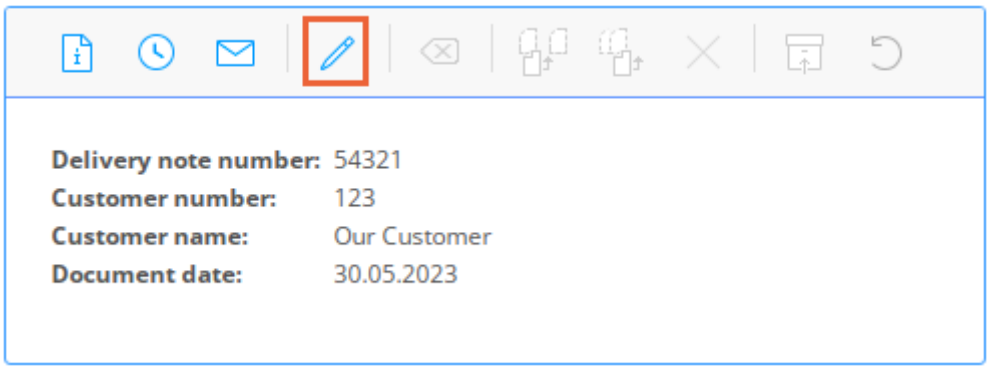
Icon	Function	Icon	Function
	Panel		View controls
	Pan		Select
	Zoom out (*Ctrl -*)		Zoom in (*Ctrl +*)
100 %	Zoom (Fit to width, Fit to page, Marquee Zoom)		
	Search		Full screen, Download, Print

Edit Mode



Select the document to be edited in the document list.

Select ***Edit*** in the ***Control panel*** of the corresponding document tab.



After the annotations were added, the changes must be confirmed by using ***Check-in*** in the ***Control panel*** of the corresponding document tab.



Add Annotations

The multiple options of annotations are displayed in the toolbar after the ***Edit*** was selected from the Control panel of the corresponding PDF document.

Extended PDF Toolbar (Edit Mode)

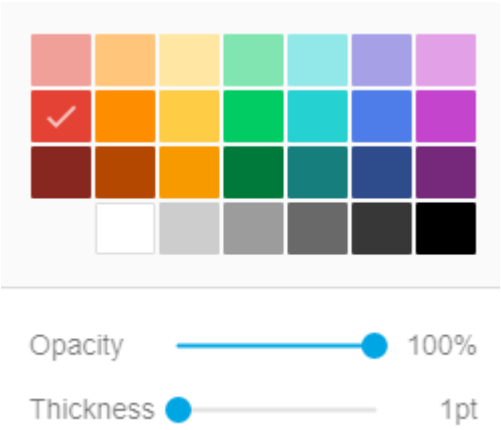


Icon	Function	Icon	Function
	Freehand		Text tools
	Shape tools		Eraser
	Signature		Free text
	Comment		Callout
	Stamp		Rubber Stamp
	Crop Page		

Freehand



The tool ***Freehand*** offers a range of colours to select from. Also, ***Opacity*** and ***Thickness*** can be defined, using sliders.

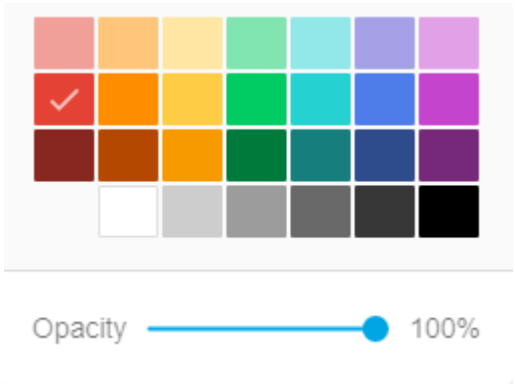


Text tools



The tool ***Text tools*** offers a range of colours to select from. The drop-down menu also provides the options ***Underline***, ***Squiggle*** and ***Strikeout***

The ***Opacity*** can be adjusted, using sliders.



Shape tools

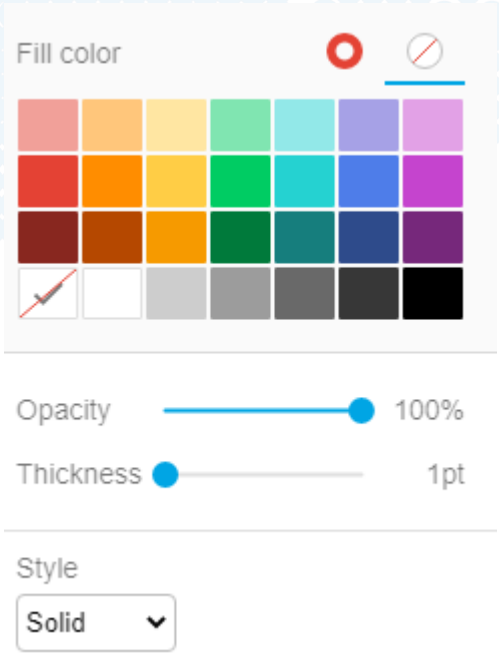


The ***Shape tools*** offers a range of different shapes to select from a drop-down menu.

Rectangle

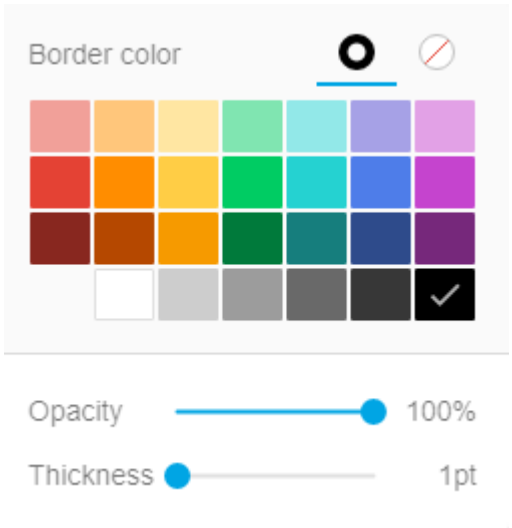


The option ***Rectangle*** offers a range of further settings in a drop-down menu. Included are options for ***Fill color***, ***Opacity***, ***Thickness*** and two different options for ***Style*** (***Border***) – ***Solid*** and ***Cloudy***.



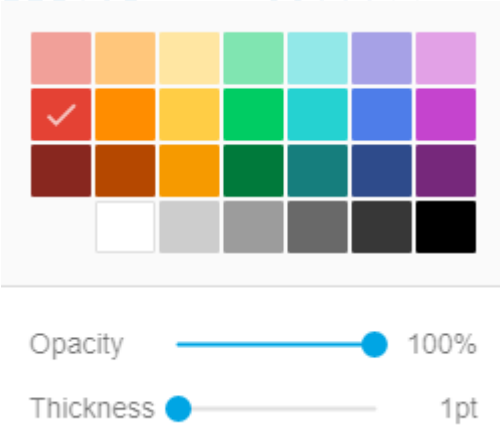
Ellipse

The option ***Ellipse*** offers a range of further settings in a drop-down menu. Included are options for ***Border color***, ***Fill color***, ***Opacity*** and ***Thickness***.



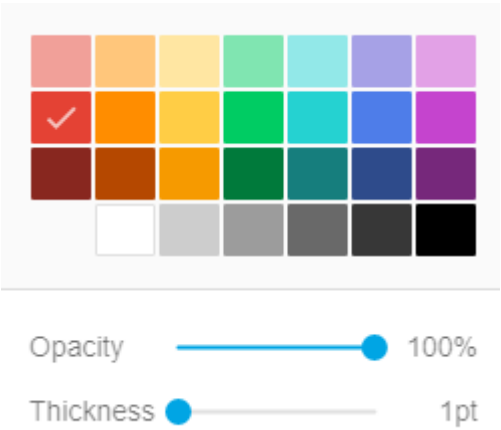
Line

The option ***Line*** offers a range of further settings in a drop-down menu. Included are options for colour, ***Opacity*** and ***Thickness***.



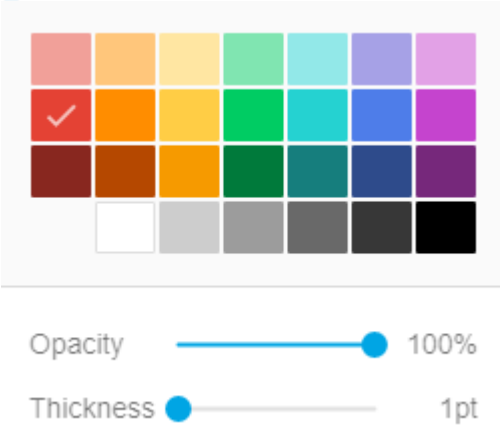
Arrow

The option ***Arrow*** offers a range of further settings in a drop-down menu. Included are options for colour, ***Opacity*** and ***Thickness***.



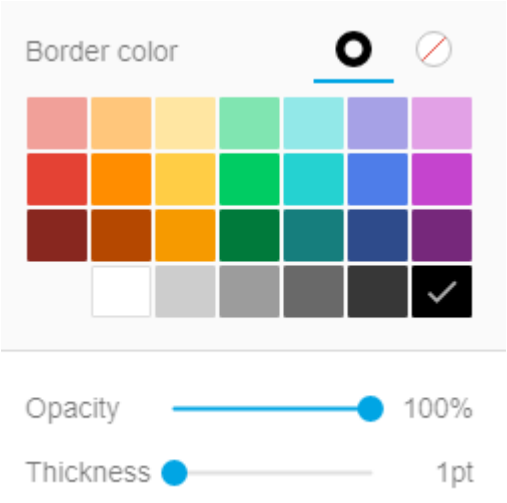
Polyline

The option ***Polyline*** offers a range of further settings in a drop-down menu. Included are options for colour, ***Opacity*** and ***Thickness***.



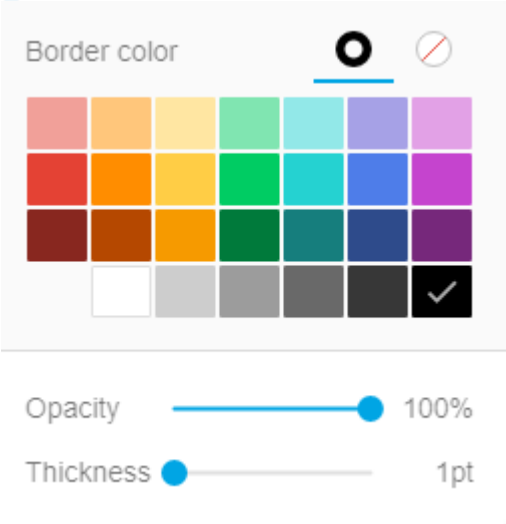
Polygon

The option ***Polygon*** offers a range of further settings in a drop-down menu. Included are options for ***Border color***, ***Fill color***, ***Opacity*** and ***Thickness***.



Cloud

The option ***Cloud*** offers a range of further settings in a drop-down menu. Included are options for ***Border color***, ***Fill color***, ***Opacity*** and ***Thickness***.



Eraser

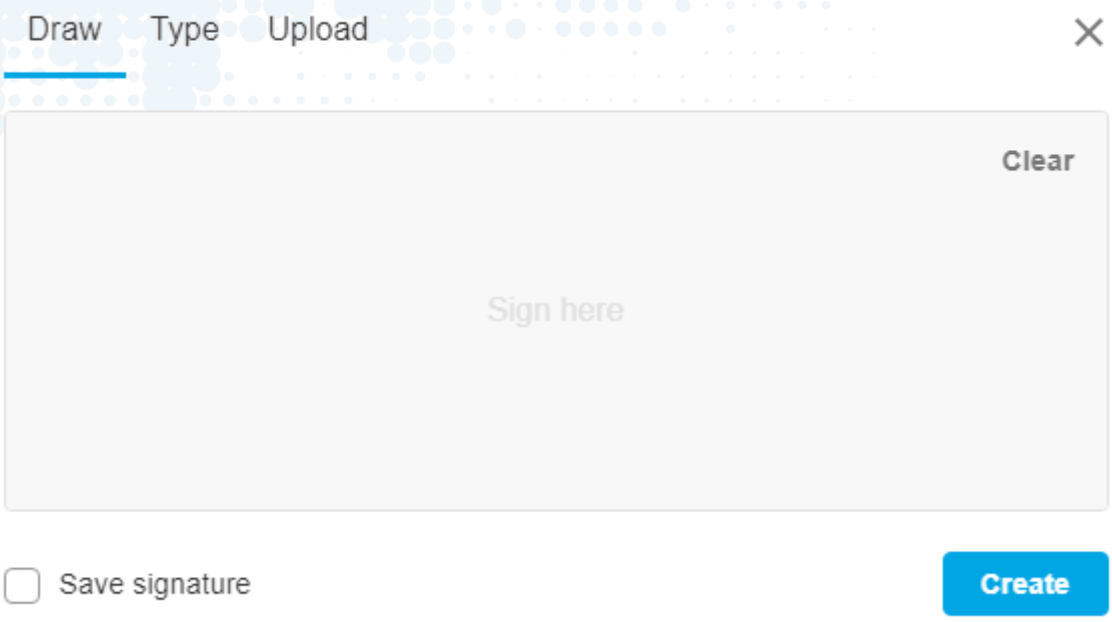
The option ***Eraser*** offers additional options for ***Opacity*** and ***Thickness***.



Signature

The tool ***Signature*** offers three options, Draw, Type and Upload.

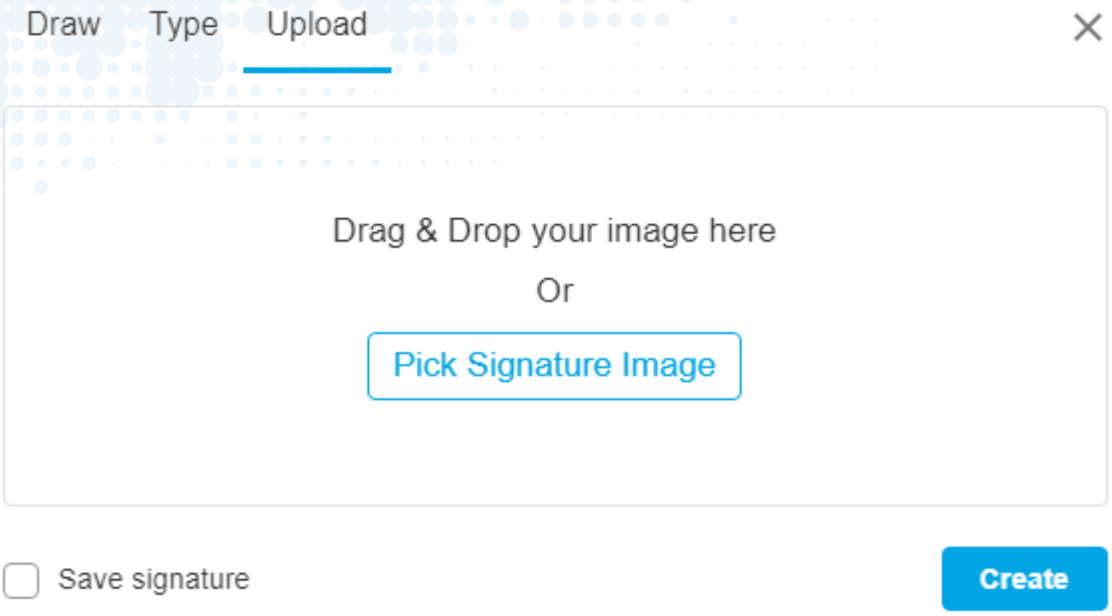
Draw


Draw
Type
Upload
Clear
Sign here
Save signature
Create

Type


Draw
Type
Upload
(no name)
(no name)
Save signature
Create

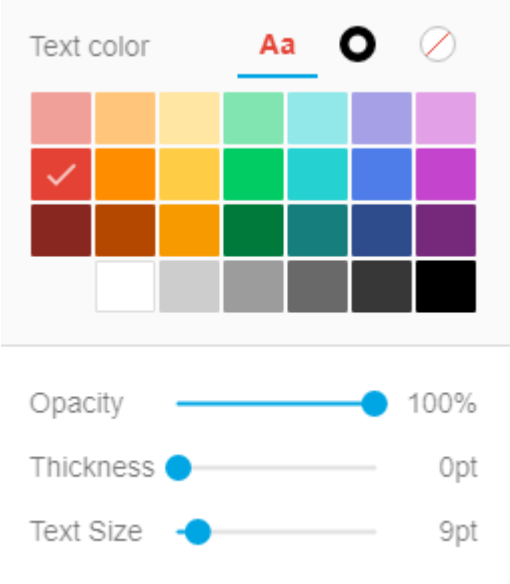
Upload



Free text

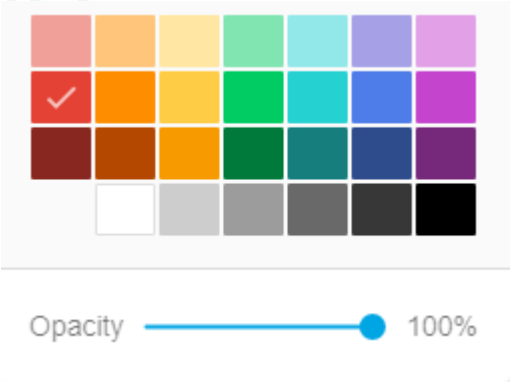
T

The tool ***Free text*** offers a range of colours to select from. ***Opacity***, ***Thickness*** and ***Text Size*** can also be defined, using sliders.



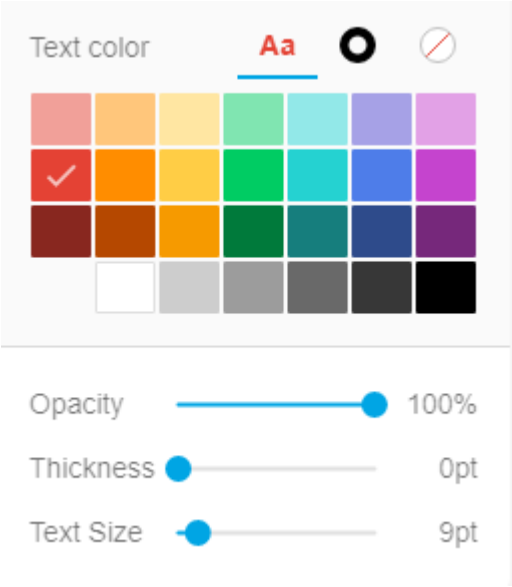
Comment

The tool ***Comment*** offers a range of colours to select from. The ***Opacity*** can also be defined by using a slider.



Callout

The tool ***Callout*** offers a range of colours to select from. Also, ***Opacity*** and ***Thickness*** can be defined, using sliders.



Stamp



With the tool ***Stamps*** you can access the stamps that have been defined and made available in the Efalia ECM Enterprise Manager under ***Stamps***.

To do this, click on the ***Stamp*** button and select the page and then the position for the stamp with the mouse pointer. After you have selected the position by mouse click, the selection of available stamps appears.

Now you can position the stamp by clicking and dragging.

Style



The ***Opacity*** can be set via the toolbar ***Style*** below the stamp.



Rubber Stamp

The tool ***Rubber Stamp*** offers a range of colours to select from. Also, ***Opacity*** and ***Thickness*** can be defined, using sliders.



Crop Page

The tool ***Crop Page*** offers a range of colours to select from. Also, ***Opacity*** and ***Thickness*** can be defined, using sliders.

WebScan

The Efalia ECM WebServer allows pages to be saved in new documents or added to existing documents in several ways. Different scanners are supported without additional driver installation. Black and white, greyscale and colour documents can be created, depending on the capabilities of the scanners.

In addition, Efalia ECM WebServer offers the use of local scan profiles if no scan profiles previously defined in Enterprise Manager are available for the logged-in user. For this purpose, Efalia ECM WebScan searches for locally connected scanners and makes them available to the user as temporary scan profiles.

Microsoft Edge ClickOnce Support

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.

Example

ClickOnce for Google Chrome - Chrome Web Store

Disclaimer

External links are being provided as a convenience and for informational purposes only; they do not constitute an endorsement or an approval by the Efalia GmbH of any of the products, services or opinions of the corporation or organization or individual.

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.

Disclaimer

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Supported scanners

The support of a scanner depends on the available drivers. Many Canon, Epson, Panasonic, Plustek and Samsung drivers are integrated in Efalia ECM. Other scanners can be used via TWAIN.

Efalia ECM WebServer supports many Canon, Epson, Panasonic, Plustek and Samsung Document Scanners directly without additional drivers, including the following. Other drivers may be added from time to time.

Canon Scanners		
CR-180 (Cheque-Scanner)	DR-6010C	DR-C240
DR-2010C	DR-6030C	DR-G1100
DR-2050C	DR-6050C	DR-G1130
DR-2080C	DR-6080	DR-M1060
DR-2510C	DR-7080C	DR-M140
DR-2580C	DR-7090C	DR-M160
DR-3010C	DR-7550C	DR-M160II
DR-3020	DR-7580	DR-X10C
DR-3060	DR-9050C	MEAP
DR-3080C	DR-9080C	MS 300
DR-3080CII	DR-C120	MS 350
DR-4010C	DR-C125	
DR-5010C	DR-C130	
DR-5020	DR-C225	
DR-5060F	DR-C225W	
DR-5080C	DR-C230	
Epson Scanner		
DS-510	DS-5500	DS-50000
DS-520	DS-6500	DS-60000
DS-560	DS-7500	DS-70000
DS-760		
Panasonic Scanner		
KV-S1015C	KV-S1046C	KV-S2087
KV-S1026C	KV-S1057C	KV-S5046H
KV-S1027C	KV-S1065C	KV-S5076H
KV-S7077		

Plustek Scanner		
PS3180U	PS406U PS456U	
Samsung Scanner		
K7600	M4580	X4300 X7600

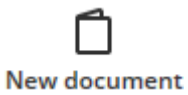
In order to use the scanners, scan profiles are configured using Efalia ECM Enterprise Manager, which can be then used within the WebScan application of Efalia ECM WebServer. Users can temporarily adjust the scan profiles during a session.

Directory scan

A scan profile can be configured as a ***Directory scanner***. Instead of using a scanner, the scan profile will import files from a defined path, either a local or a UNC path. This scan profile can be configured to delete the files from the import location after they have been imported.

Scanning Rights

Work area: New Document



The work area New Document is only visible for users logging into Efalia ECM WebServer using either an ***fd-scan*** or ***fd-scan-named*** licence.

The area is not visible if using an ***fd-user*** or ***fd-user-named*** licence for login.

Scan profiles

If a user needs access to scan profiles, set-up in Efalia ECM Enterprise Manager, these rights must be granted for each scan profile.

Local Scan Profiles/Directory Scanner

Local scan profiles for connected and supported scanners and a directory scanner are only available if no other scan profiles, created in Efalia ECM Enterprise Manager, are permitted for the logged-on user account.

Scan Profiles

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.

Change scanner settings

The scanner settings can be temporarily changed in WebScan. 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.

The configuration of the scanner driver is reset to its default settings using the ***Default*** button

Local Scan Profiles

When a workstation has a scanner attached to it, the WebScan can create a local temporary scan profile if the user has scan rights, but no pre-defined scan profiles exist for that user.

When the user selects the ***WebScan*** in the ***Upload*** tab, the WebScan application will create a list of the pre-defined scan profiles available to the user. If none exist, WebScan will look to see if any scanners are attached to the workstation. If there is a scanner, a temporary scan profile will be created. The settings available within ***Scanner setup*** will be dependent upon the installed scanner driver and the capabilities of the scanner.

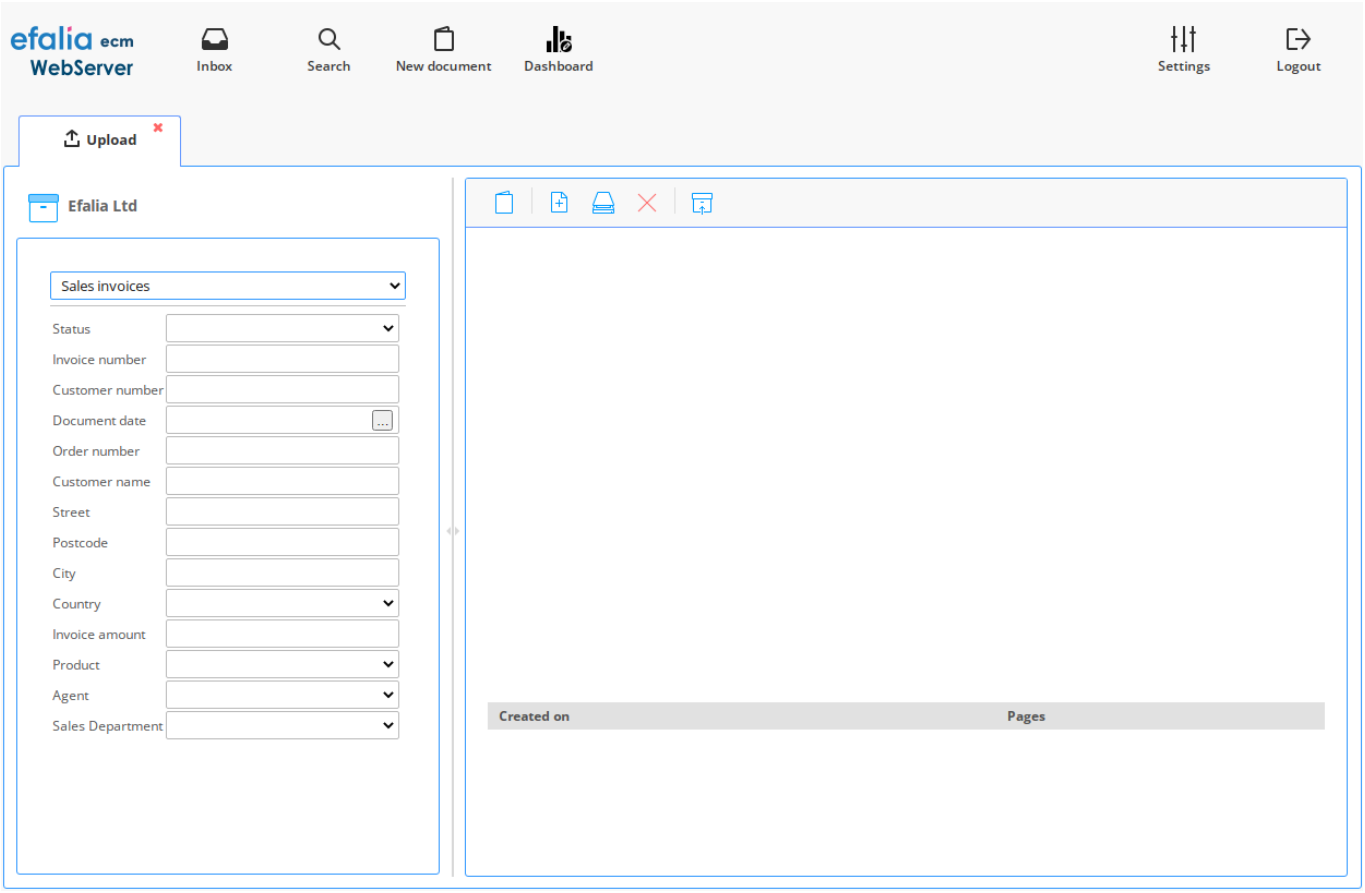
WebScan will also create a temporary Directory scan profile to allow documents to be imported from the workstation or other location.

These scan profiles are temporary, and will not be saved between sessions.

New document

The Efalia ECM WebScan feature is located in the working area ***New documents***, which can be selected from the top toolbar of the Efalia ECM WebServer desktop.

After selecting ***New document***, the corresponding tab ***Upload*** opens.

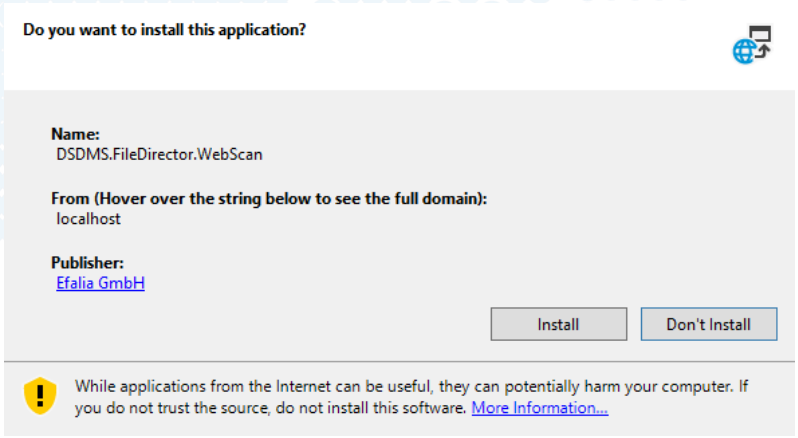


On the left-hand side, all details of the selected cabinet and document type are displayed.

The larger area on the right-hand side provides a toolbar, a document view area and a document list, which contains new documents either created by the option ***Add*** or ***WebScan***.

Installation

When selecting ***Open WebScan*** from the toolbar for the first time, the application Efalia ECM WebScan application is added to your browser. A notification window for the installation of ***DSDMS.FileDirector.WebScan*** opens and the installation must be confirmed.



Scanning documents

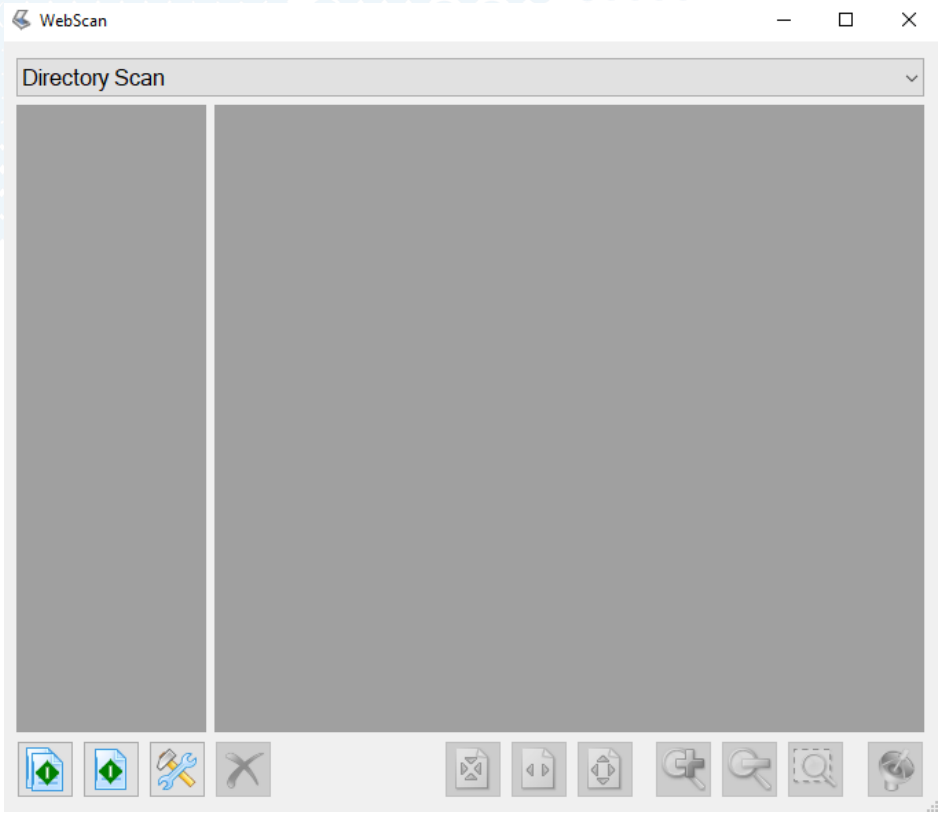
After the installation, the Efalia ECM WebScan window opens.

The drop-down menu provides the available scan profiles.

These are either scan profiles that were previously created in the Efalia ECM Enterprise Manager and are permitted for the logged in user account or a directory scanner and, if connected, local scanners.

Also see: Local Scan Profiles/Directory Scanner.

The left part of the window displays the thumbnails of the scanned document and the right part displays, the selected page of the scanned document.



Below the display areas is a toolbar, which provides the WebScan options.

Icon	Description
	Batch scan
	Single-page scan
	Scanner setup
	Delete
	Image 100%
	Fit width
	Fit all
	Zoom in
	Zoom out

Icon	Description
	Zoom area
	Upload

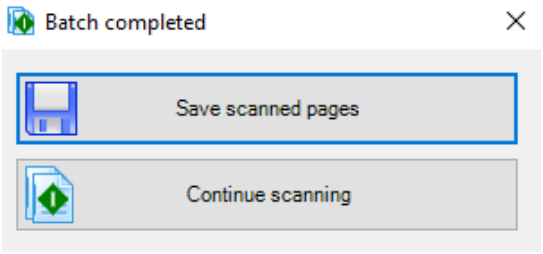
Batch Scan



Using ***Batch Scan*** all pages in the feeder of a scanner are scanned and stored as one document in Efalia ECM. Exceptions to this are scanning processes that use page bundling or a separator has been defined within the OCR forms.

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 WebScan toolbar.
4. After the batch was scanned, a pop-up window asks whether you want to save the scanned pages or to continue scanning.



Save scanned pages

When selecting ***Save scanned pages***, all scanned pages are displayed in the preview window of WebScan.

Now, the scanned pages can be checked and, if needed, individual pages can be deleted before selecting ***Upload*** or additional pages can be added by selecting a scan option, again.

Continue scanning

When selecting ***Save scanned pages***, all scanned pages are displayed in the preview window of WebScan.

Now, the scanned pages can be checked and, if needed, individual pages can be deleted before selecting ***Upload*** or additional pages can be added by selecting a scan option, again.

Scan Single Pages

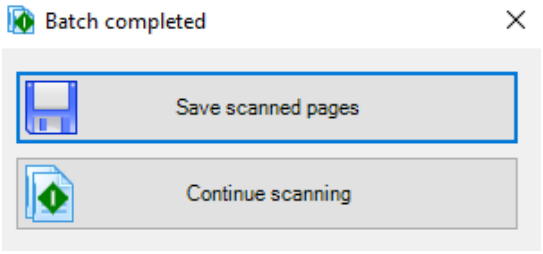


All documents in the feeder of a scanner are scanned and each page is stored as a single-page-document on the upload list, after selecting ***Upload*** in the WebScan window.

A horizontal line between each thumbnail illustrates that these pages were scanned, using ***Scan single pages***. In addition, each thumbnail shows a *1* below.

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 single pages*** from the WebScan toolbar.
4. After the batch was scanned, a pop-up window asks whether you want to save the scanned pages or to continue scanning.



5. Check the scanned pages by browsing through the thumbnails and clicking on a page in question.
6. Delete, if appropriate, pages before using ***Upload***.
   Use the checkbox below each thumbnail for selection and use ***Delete*** from the WebScan toolbar.
7. After selecting Upload, all pages shown in the thumbnail area of the WebScan window are uploaded to the upload list.

Note

Each thumbnail in the preview window represents a single page document on the upload list.

The screenshot below shows two pages scanned by using ***Scan single pages***.



Upload

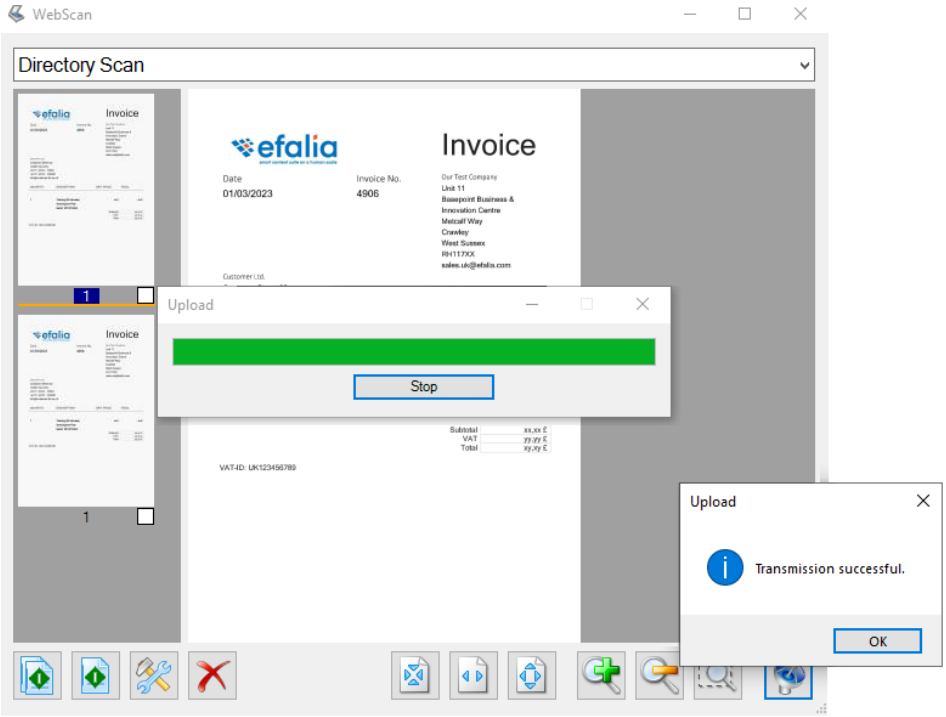


After selecting ***Upload***, all pages shown in the thumbnail area of the WebScan application are uploaded to the list and a pop-up window confirms the successful upload.

Important

These documents are not sent to the Efalia ECM server via **Upload**, but only to the list in the **Upload** tab.

This list will be deleted at the end of the browser session.

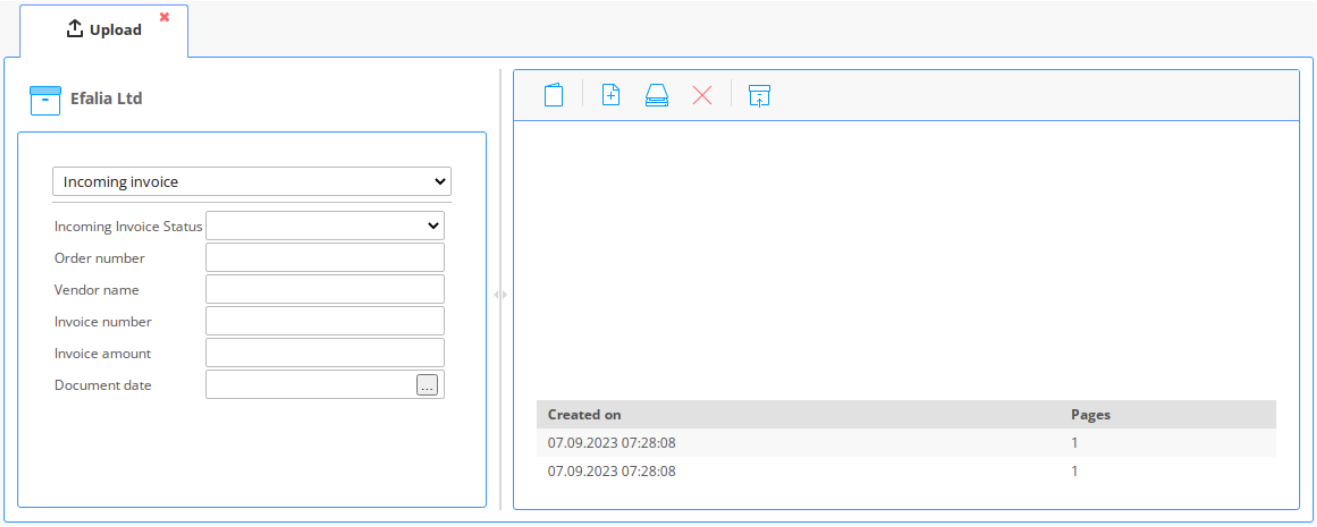


Verify and Check-In

If scanning is done without Efalia ECM Form Recognition, the scanned documents that are sent to the list are linked to the previously selected document type but the associated index fields are not filled at this point.

Important

Performing a **Check-In** on these documents without manually indexing them can make later searches more difficult.



Indexing documents manually (Local Scan Profiles/Directory Scanner)

Note

Local scan profiles and the option Directory Scanner are only available if no Efalia ECM scan profile is available for the logged on account.

Create a new document



The button ***Create a new document*** on the tab ***Upload*** must be selected before creating a new document.

Now, the ***Cabinet*** and ***Document type*** must be selected in the left area of the tab before starting to upload. This applies to both an upload via ***Add*** and via ***Open WebScan***.

Add



Using ***Add***, the corresponding files can be selected from the file system and uploaded to the list in the ***Upload*** tab, using ***Upload file***.

Open WebScan



Using WebScan (Local Scan Profile), documents can be uploaded to the list in the ***Upload*** area via a locally connected scanner.

Files from a directory can also be uploaded to the list in the Upload tab via WebScan (Directory Scan).

Since the option ***WebScan (Directory scan)*** is not based on or connected to a scan profile that was previously created in the Efalia ECM Enterprise Manager, it can only be used for manual indexing and the ***Cabinet*** and ***Document type*** must be selected beforehand.

Enter Index Values

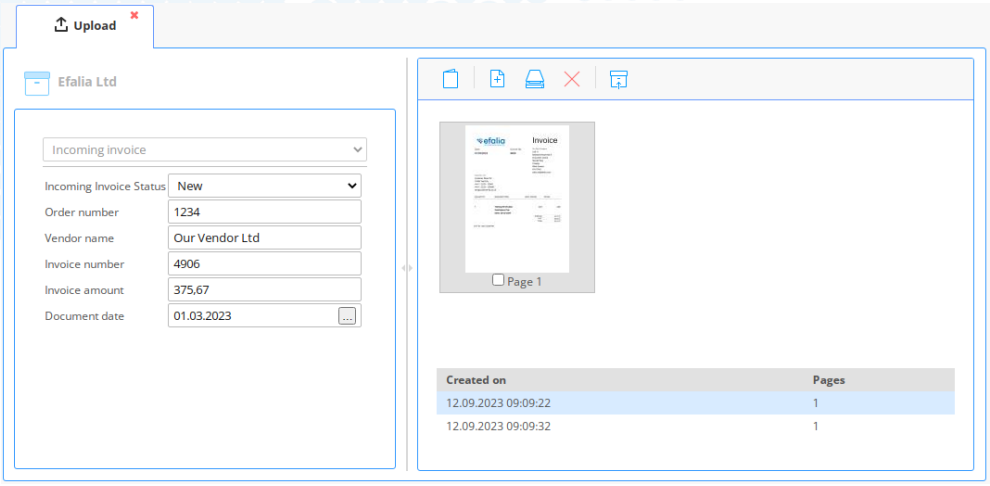
Now, the uploaded documents must be indexed.

After selecting a document, the associated thumbnails are displayed above the upload list.

The ***Cabinet*** and the ***Document type*** that were previously selected are displayed in the left area.

The associated fields are displayed below the document type on the left hand side and can now be filled.

It is highly recommended to add the proper information before ***Check-in***.



Check in documents

Select the document on the local list you want to check in and add the appropriate index values. Now select ***Check-In*** and the selected document is sent to Efalia ECM.

For each document you want to check in, the index fields must be filled right before check-in.

Selecting ***Check-in*** before all the necessary information has been entered may make it more difficult to retrieve this document later.

Indexing documents manually (Efalia ECM Scan Profile without OCR Forms Recognition)

Create a new document

The button ***Create a new document*** on the tab ***Upload*** must be selected before creating a new document.

When working with Efalia ECM scan profiles, only the ***Cabinet*** must be selected beforehand. The ***Document type*** is given by the Efalia ECM scan profile.

Note

The option **Allow to change manually**, which can be selected when creating a Scan profile, is not enabled when using WebScan.

The document type that was defined in the selected scan profile during setup is always used.

Open WebScan



Files and documents can be uploaded to the list in the upload area using existing, pre-defined scan profiles.

These can be either profiles for physical scanners or virtual directory scanners.

The document type is specified via the Efalia ECM scan profile.

Enter Index Values

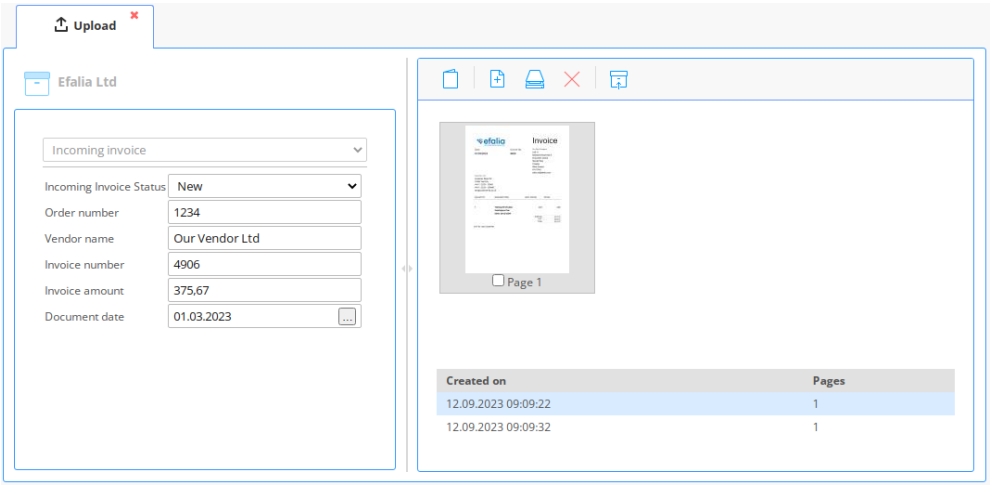
Now, the uploaded documents must be indexed.

After selecting a document, the associated thumbnails are displayed above the upload list.

The ***Cabinet*** and the ***Document type*** that were previously set are displayed in the left area.

The associated fields are displayed below the document type and can now be filled.

It is highly recommended to add the proper information before ***Check-in***.



Check in documents



Select the document on the local list you want to check in and add the appropriate index values. Now select ***Check-In*** and the selected document is sent to Efalia ECM.

For each document you want to check in the index fields must be filled right before check-in.

Selecting ***Check-in*** before all the necessary information has been entered may make it more difficult to retrieve this document later.

Indexing documents automatically (Efalia ECM Scan Profile with OCR Forms Recognition)

Create a new document



The button ***Create a new document*** on the tab ***Upload*** must be selected before creating a new document.

When working with scan profiles, only the ***Cabinet*** must be selected beforehand. The ***Document type*** is given by the scan profile.

Open WebScan



Files and documents can be uploaded to the list in the upload area using existing, pre-defined scan profiles.

These can be either profiles for physical scanners or virtual directory scanners.

The document type is specified via the Efalia ECM scan profile.

Enter Index Values

After selecting a document, the associated thumbnails are displayed above the upload list.

The ***Cabinet*** that was previously selected and the ***Document type*** that was recognised by the OCR form are displayed in the left area.

The associated fields are displayed below the document type and can now be filled.

The index fields are automatically filled, according to the mapping defined in the OCR form.

Note

Multipage documents e.g. **PDF** are not split.

Only the first page can be used to define batch start or batch end.

The first recognized values for an index field are always used. Subsequent ones are ignored if an index value has already been recognized for a field.

Values can also be added manually at this point.

Check in documents



Select the document on the local list you want to check in and add the appropriate index values. Now select ***Check-In*** and the selected document is sent to Efalia ECM.

For each document you want to check in the index fields must be checked right before check-in.

Selecting ***Check-in*** before all the necessary information has been checked may make it more difficult to retrieve this document later.

Print and Save Documents

PDF documents or documents which have been temporarily converted to PDF for display by the Efalia ECM WebServer can be printed directly with Efalia ECM Web using the ***Print*** function. Document lists, TIFF and JPEGS, on the other hand, if excluded from temporary conversion, can only be printed via the browser's print function.

Note

The different configuration options for the Conversion to PDF are described in the Efalia ECM Installation manual and can be adjusted by a trained system administrator.

PDF Toolbar (View Mode)

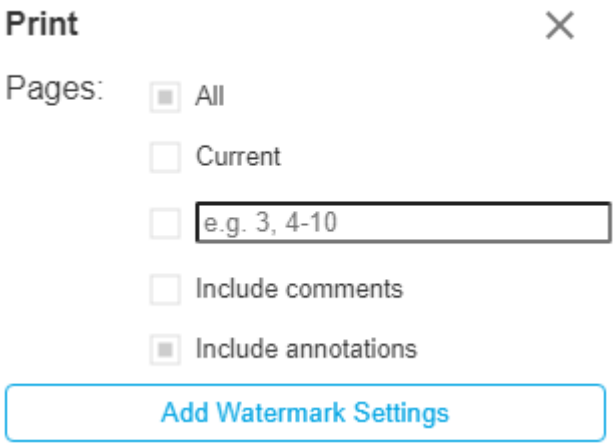


Icon	Function	Icon	Function
	Panel		View controls
	Pan		Select
	Zoom out (***Ctrl -***)		Zoom in (***Ctrl +***)
100 %	Zoom (Fit to width, Fit to page, Marquee Zoom)		
	Search		Full screen, Download, Print

Print (PDF Documents/Displayed in PDF Format)

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 you select the options ***Include comments***, the corresponding comments are output as additional pages.

Include annotations

If you select the options ***Include annotations***, the corresponding comments are output as additional pages.

Print (Print features of the browser)

Printing documents (TIFF/JPEG display in original format)

Documents in TIFF or JPEG format can only be printed using the browser's print function, unless they have been temporarily converted to PDF format for display.

Print a page of a document

For printing a selected page, open the document and display the page to be printed.

Now you can print the contents of the browser tab using the ***browser's print function***.

Note

When using the browser's print functionality, only the entire tab can be printed at a time.

Print selected pages of a document

In order to print several pages of a document, this document must be displayed as a PDF in the Efalia ECM WebServer. In this case, the print functions within the PDF toolbar are available.

Also see: Print (PDF Documents/Displayed in PDF Format)

Print Hit Lists

For printing a hit list, open the Search section and perform a search.

Now you can print the contents of the browser tab using the ***browser's print functionality***.

Note

When using the browser's print functionality, only the entire tab can be printed at a time.

Save as File

Save individual pages (only TIFF/JPEG display in original format)

When a multi-page TIFF or JPEG document is displayed in its original format, individual pages can be selected via the thumbnail view and then saved with the ***Save as...*** function. In the following window you can choose whether the selected pages of the document are to be saved in ***PDF format***, ***ZIP format*** or in the ***original format*** in a file.

Note

If saved in a zip file, the document will not be converted to PDF.

Save entire document

Mark the document in the hit list using the selection box at the beginning of the line and select the ***Save as...*** icon. In the following window you can choose whether the document is to be saved in PDF format, ZIP format or in the original format in a file.

The corresponding file is stored in the download directory of the respective Windows user. The ***default file name*** is ***download***.

Note

If saved in a zip file, the document will not be converted to PDF.

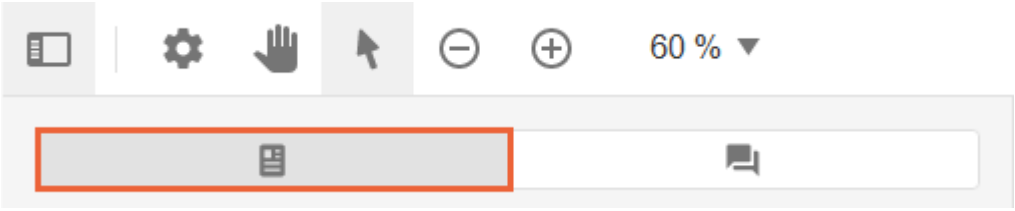
Save Selected Pages as PDF (Display in PDF-Format)

If a multi-page PDF document or document that has been temporarily converted to PDF for display by Efalia ECM Web is displayed, individual pages can be selected via the thumbnail view.

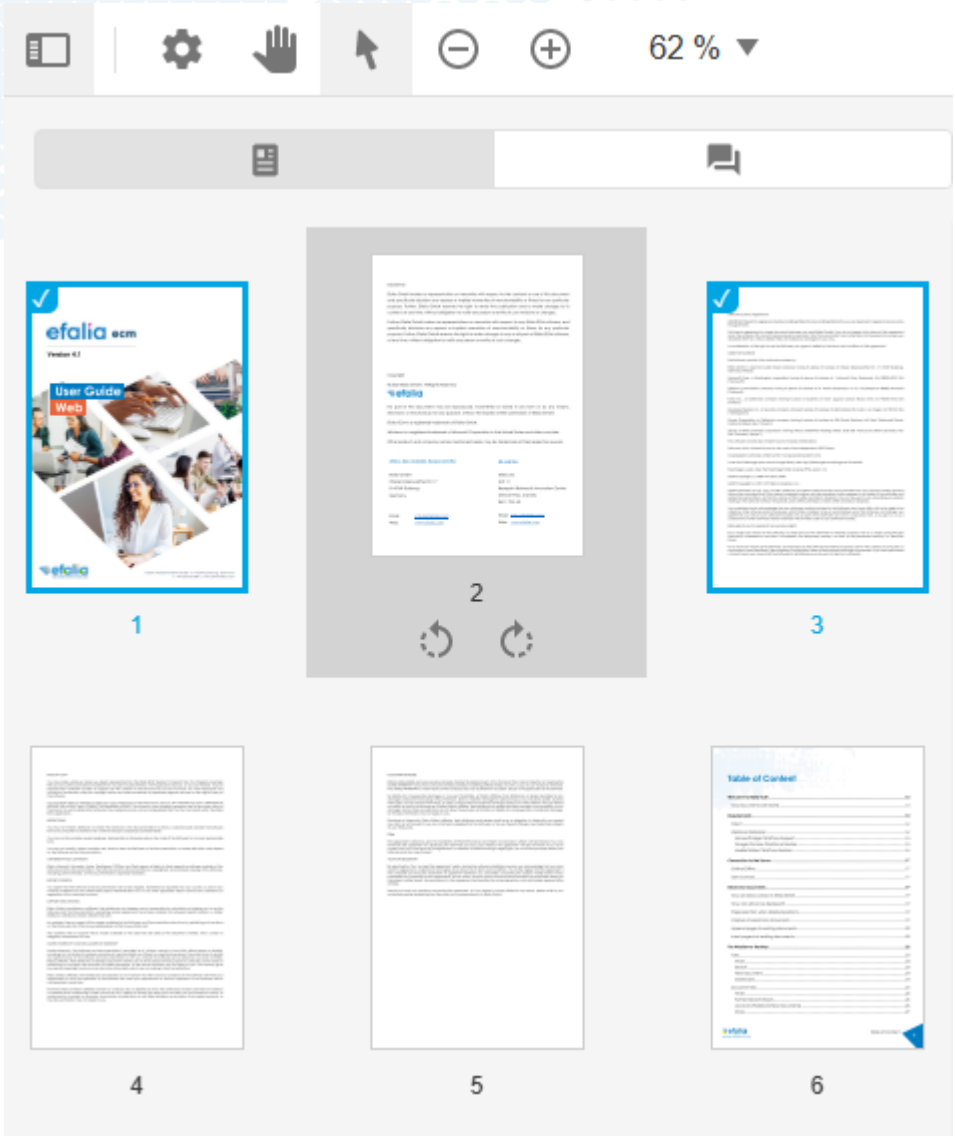
Display Thumbnails

In the display area, click ***Panel*** and then select the option ***Thumbnails***.

Example

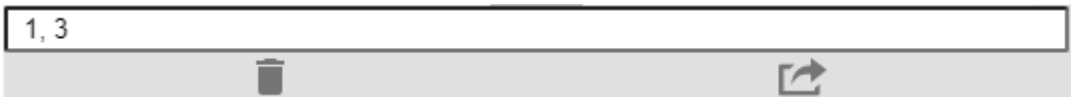


Now the thumbnails of the individual pages are displayed. You can now click and drag to adjust the display area of the thumbnails if you want to have as many pages as possible displayed in the thumbnail at the same time.

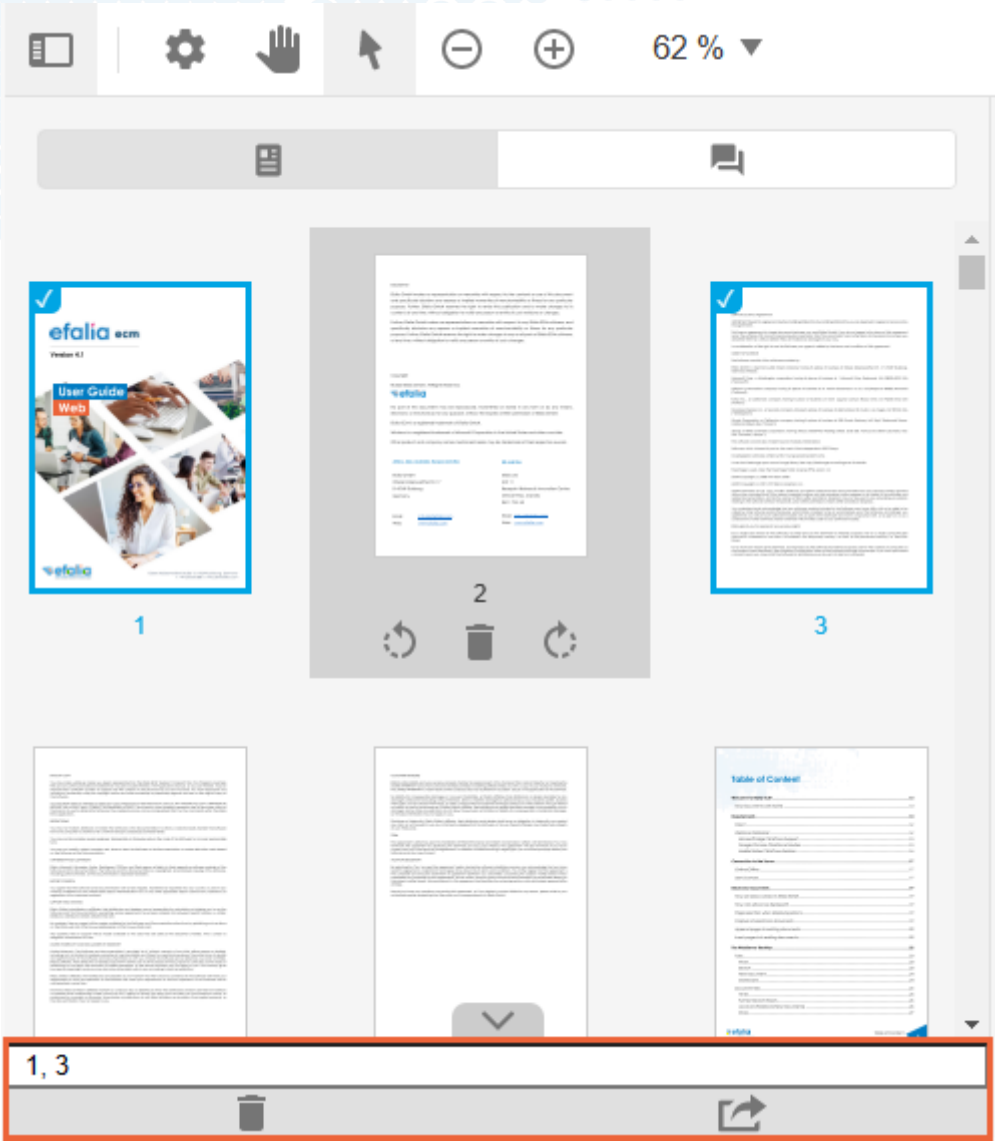


Now ***hold down the Ctrl key and select the relevant pages with the left mouse button***. These are now shown with a border and can now be moved, deleted or extracted within the document by clicking and dragging.

Edit Mode



Now, you can also use the input field below the thumbnail to select the relevant pages, for example: ***1,3*** or ***1,5-8,10***.


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efalia ecm
User Guide
Web
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1, 3

WebMail

Efalia ECM WebMail is a browser plug-in that allows users sending Efalia ECM documents using an existing, compatible Email client.

The Email option of Efalia ECM allows sending of single or selected documents as well as single or selected pages of a document.

In order to use this feature you must have a valid Email account and a MAPI compatible Email client must be used on the workstation.

Microsoft Edge ClickOnce Support

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.

Example

ClickOnce for Google Chrome - Chrome Web Store

Disclaimer

External links are being provided as a convenience and for informational purposes only; they do not constitute an endorsement or an approval by the Efalia GmbH of any of the products, services or opinions of the corporation or organization or individual.

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

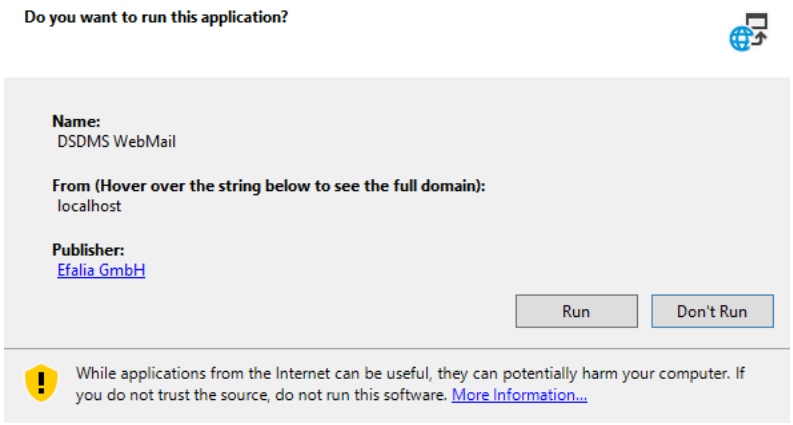
Add the extension and restart the browser.

Disclaimer

External links are being provided as a convenience and for informational purposes only; they do not constitute an endorsement or an approval by the Efalia GmbH of any of the products, services or opinions of the corporation or organization or individual.

Installation

When selecting Email for the first time, the application Efalia ECM WebMail application is added to your browser. A notification window for the installation of ***DSDMS WebMail*** opens and the installation must be confirmed.



Sending documents

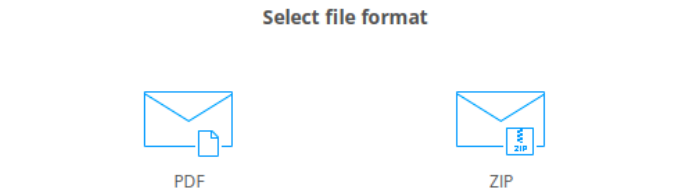
Sending documents from the hit list by e-mail



The email options of Efalia ECM WebServer allow you to send individual or selected documents and to send a single or selected page of a document as an email (TIFF/JPEG documents only).

To use this feature, you must have a valid e-mail account and a MAPI-compatible e-mail client must be installed on your computer.

File Format Selection



Here Efalia ECM WebServer offers you the choice of attaching the document or the selected pages as a ZIP file or as a PDF document.

Attachment in PDF Format

If the selected elements are to be attached as a PDF file, click on PDF in the selection window.

Now a PDF file is generated for the selected elements and the installed e-mail client opens a new e-mail containing the PDF file as an attachment.

Attachment in ZIP-Format

If the selected elements are to be attached as a ZIP file, click on ZIP in the selection window.

Now a ZIP file is generated for the selected elements and the installed e-mail client opens a new e-mail containing the ZIP file as an attachment.

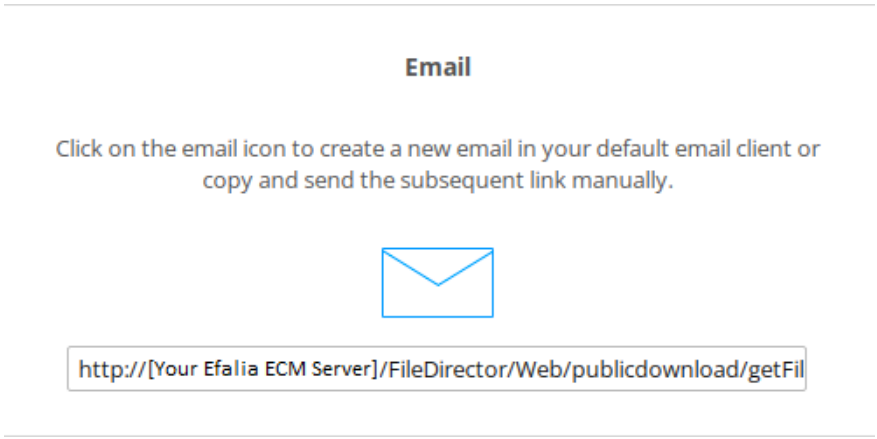
If the document to be sent contains only black and white TIFF images, the ZIP file of the e-mail contains one TIFF file per page.

If the document contains mixed file formats, the ZIP file will contain one TIFF file per black/white TIFF page and one JPEG file per colour page; any other file format will be directly included in the ZIP file as the original file format.

E-Mail with Download-Link



Selecting the function ***E-mail*** within the ***Control Box*** of an open document generates a link for a download of the corresponding document.



Note

If documents are sent as a link, the recipient must be an Efalia ECM user or at least anonymous access must be configured so that the link can be opened.

Entire Document

A single document or multiple documents, including all pages, can be added to an email as attachment, by selecting the checkbox in the search result list of each document you want to add.

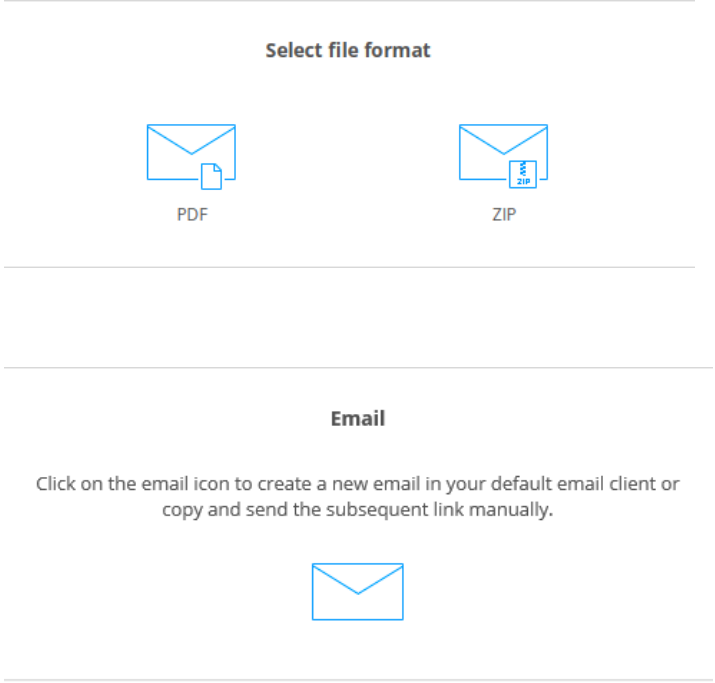
Note

Multiple documents can only be selected within a single document type.

After selecting the document or multiple documents from the search result list and selecting the Email button, a pop-up window appears.

Within this pop-up window, you can choose the format for the email attachment.

Available formats are PDF and ZIP.



Single Pages (TIFF/JPEG only)

The option ***Thumbnails*** must be selected from the toolbar beforehand that single pages can be selected.

Now, the corresponding thumbnails of the selected document are displayed on the left-hand side. By using the checkboxes below each thumbnail, a page can be selected or deselected. Also it is possible to choose pages from different documents.

Icon	Function
	Select all pages
	Deselect pages
	Toggle selected pages

Note

Individual pages can only be selected when the documents are within a single document type.

Multipage edocs are displayed with a single thumbnail thus no individual pages can be selected in edocs.

Ad Hoc Workflow

Setup (WinClient only)

Using the Ad Hoc Workflow, users can create their own document processes and send documents to them. Users are limited to a maximum of 5 single step ad hoc workflows each.

Document receipt

An ad hoc workflow, created in Efalia ECM WinClient, is displayed and handled in the same way Efalia ECM BusinessProcessManagement workflows are.

For further information see: Efalia ECM BusinessProcessManagement - Document Receipt.

Process Management

Efalia ECM documents can be integrated into workflow processes using the process management option. With this module the path of a document through the steps of a defined process can be configured and then performed.

A process consists of several steps that are performed consecutively. Each process step can be individually configured to be worked on or whether an action is to be performed by one or more users. Defined tasks are specified for each user, for example approve, reject, comment or simply view (confirm notice).

If the task specified is carried out, the document is routed to the next step of the process depending on the structure of the process. Process management controls the path of a document through the process steps and keeps track of the status and location of a document.

Send on a Process

In order to send a document to a process, the processes must be predefined.

Documents can only be sent automatically to processes via Efalia ECM WebServer.

Automatic Sending

Documents can be automatically sent to a process depending on the configuration of the process. Automatic options include

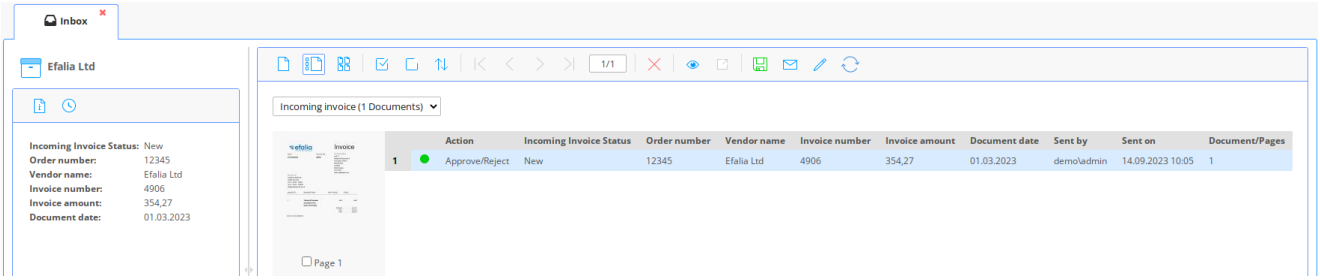
- New documents added to a Document Type optionally depending upon index criteria set for the document
- Existing Documents within a Document Type, depending upon index criteria set for the document.

Inbox

Within the tab ***Inbox*** you find all documents either sent to you through the Efalia ECM ProcessManagement, an adhoc process or through the Efalia ECM WinClient feature ***Send to…user***.

Icon	Function
	Open cabinet
	Document Info
	Revisions

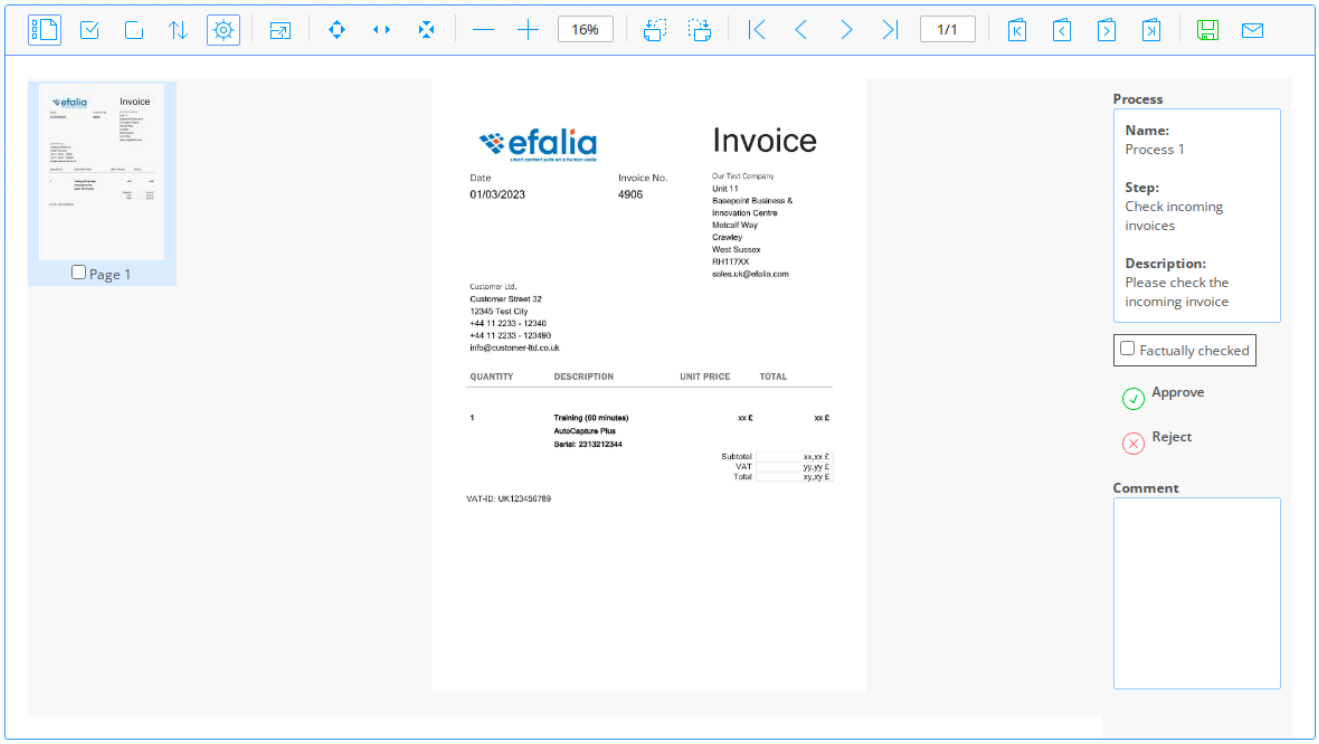
Document Receipt



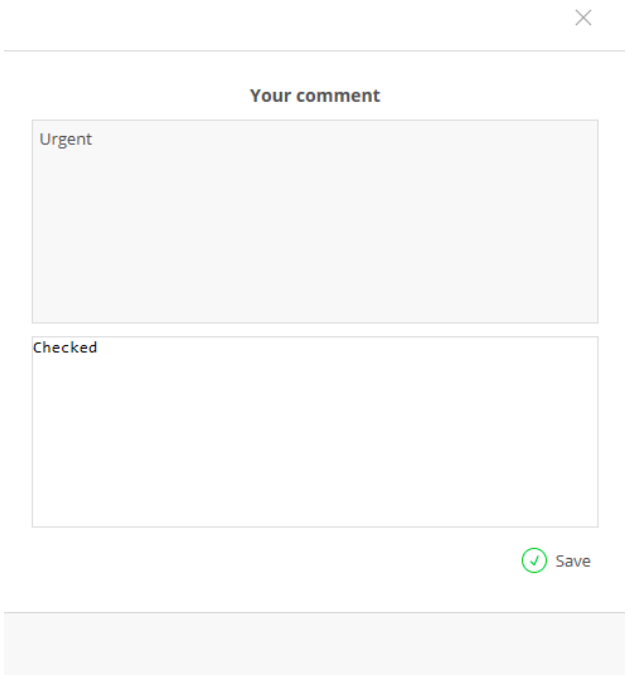
Each document received by a user from a process, is listed in the ***Inbox***. The action, which the user must perform, is displayed in the ***Action*** column of the ***Inbox*** list. This includes documents received as part of a process and from ad hoc workflows.

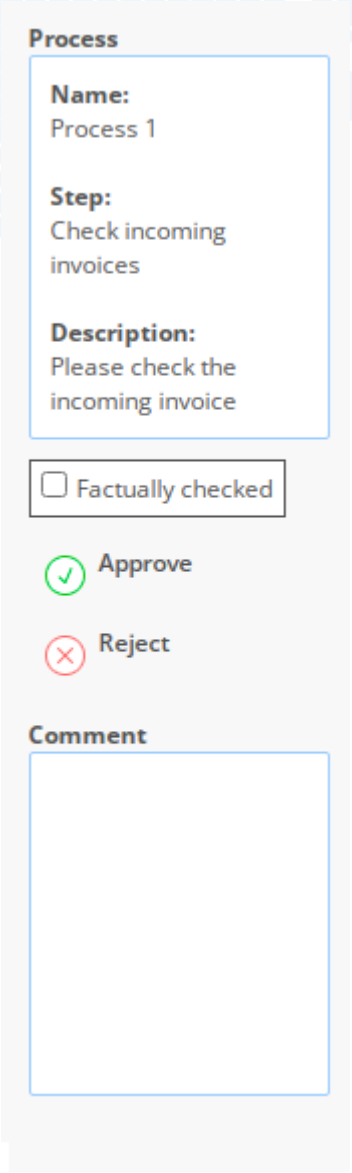
After opening a document from the inbox list, the document is displayed in a separate tab.

The tab shows the corresponding index information on the left hand side. A tasks pane is opened on the right within display area, which will allow the user to perform the relevant action. The comments are also displayed which may already have been added by other users in previous process steps.



Following the performed ***User action***, a comment can be entered, which is displayed for the next ***Agent***.





The top area shows the process name, the name of the step and the description, given during the configuration in Efalia ECM Enterprise Manager.

Below, ***Check user action*** elements are listed, if configured for this process management step.

Corresponding buttons for the required ***User action*** of this process step.

The comment section contains comments made by other users in previous steps.

Process actions

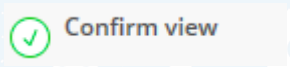
For each document received by a user, the configured action needs to be performed. The document will stay in the users ***Inbox*** until either the required action is performed or the time delay specified is reached. Process management then takes control of the document.

The following actions can be set in Efalia ECM Enterprise Manager:

No action

Action ***Nothing*** is used to send a document to a user during a process for information purposes. This action does not influence the process at all.

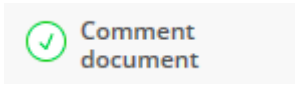
Confirm view



If the action View is specified for a document, the user must confirm that they have viewed the document. The process management can then take the document to the next step in the process.

The default action text for is ***Confirm view***. This can be user defined, and therefore the Confirm view actions may be differently named.

Comment



If a document step has the action Comment assigned, the user must view and add a comment regarding the document. Pressing the ***Comment*** button will open a window showing all previous comments made, and will allow the user to add their own comments. The process management can then take the document to the next step in the process.

The default action text for is ***Comment document***. This can be user defined, and therefore the Comment document actions may be differently named.

Approve/Reject



If the action Approve/Reject is specified for a document, the user must read and then decide whether the document is approved or rejected. In both cases a comment can be added. The process management can then take the document to the next step in the process.

The default action text for is ***Approve document*** and ***Reject document***. This can be user defined, and therefore the Approve/Reject actions may be differently named.

Check user actions



User actions can be defined during the configuration of a process. A list of entries will be defined which must be completed before the user can confirm. This list can be configured to be user specific. If all the checks are not completed, the document will be rejected. Will not move to the next step of the process, and will remain in the users Inbox until all the checks have been completed.

The options that have been checked can be seen in the Comments of the document.

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.

To view information on a document, select and open the document from a document list.

Select ***Document Info*** from the control panel in the corresponding document tab. A window, which shows all information on the document, is opened.

Example

Document Info

Name	Value
ID	20180829-0818-1223-3866-2b93fb7f6464
ID (Ref)	
Status	Archived
Pages	1
Revisions	2
Revision	2
Created on	29.08.2018 10:18:12
Created by	demo\admin
Archived on	29.08.2018 10:20:08
Last modified on	24.01.2019 08:31:55
Last modified by	demo\admin
Checked-Out on	
Checked-Out by	
Size	527,04 KB

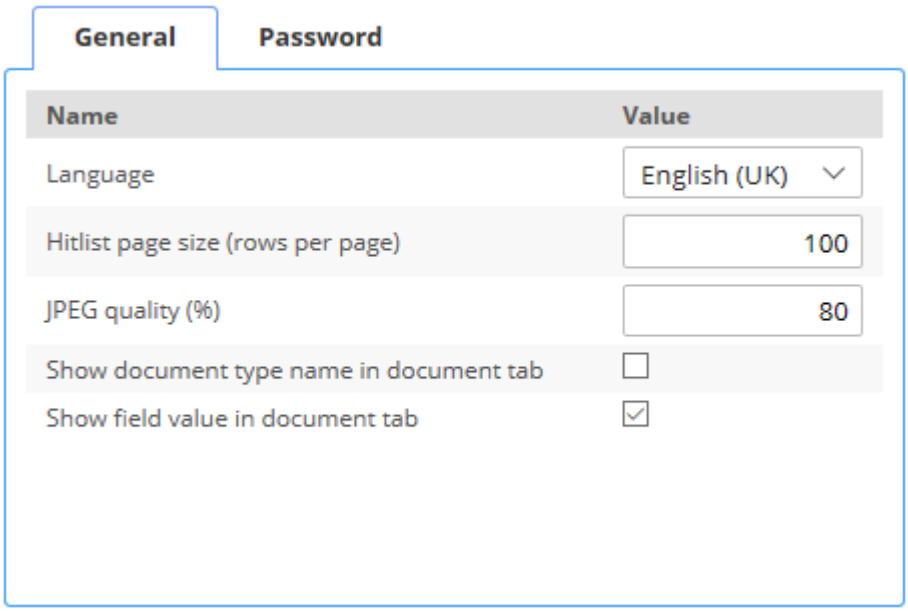
Document

This displays general information about the document

Information	Description
ID	Unique number (ID) of the document
ID (Ref)	
Status	Actual status : Archived, Checked Out, Read only
Pages	Number of pages
Revisions	Number of revisions
Revision	Number of selected revision
Created on	Date of document creation
Created by	The user who created the document
Archived on	Date of first storing in the cabinet on the server
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	Storage space used by the document

Settings

General



Language

The drop-down menu offers the following languages:

English (UK)	English (US)
Deutsch	Français
Niederländisch	Português
Español	Japanese
Chinese (Big5)	Chinese (Simplified)

Hitlist page size

The set value defines the number of documents shown per hitlist page.

The default value is 100.

The hitlist pages can be browsed through, using the corresponding icons of the toolbar.

Icon	Function	Icon	Function
	First page		Previous page
	Next page		Last page
	Number of the currently displayed hitlist page		

Note

The value, entered here, does not affect or override the **Max. number of hits in hitlist** value set in **ConfigUtility (Server)**.

Show document type name in document tab

When selected, Efalia ECM WebServer displays the name of the corresponding document type in the document tab.

Show field values in document tab

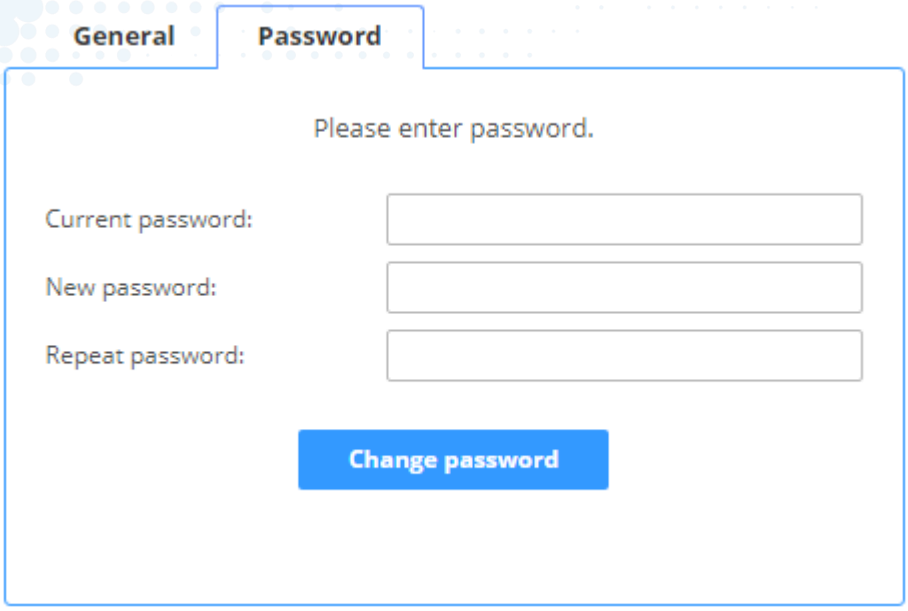
When selected, Efalia ECM WebServer uses the value, a double-click was performed on, as part of the document tab naming.

Note

When both options are selected, the order is document type name – value used for opening the document.

Password

The Password tab allows a user to change the password of the account that is actually logged-in this Efalia ECM WebServer session.



Current Password

Enter your current password into the field.

New Password

Enter your new password into the field.

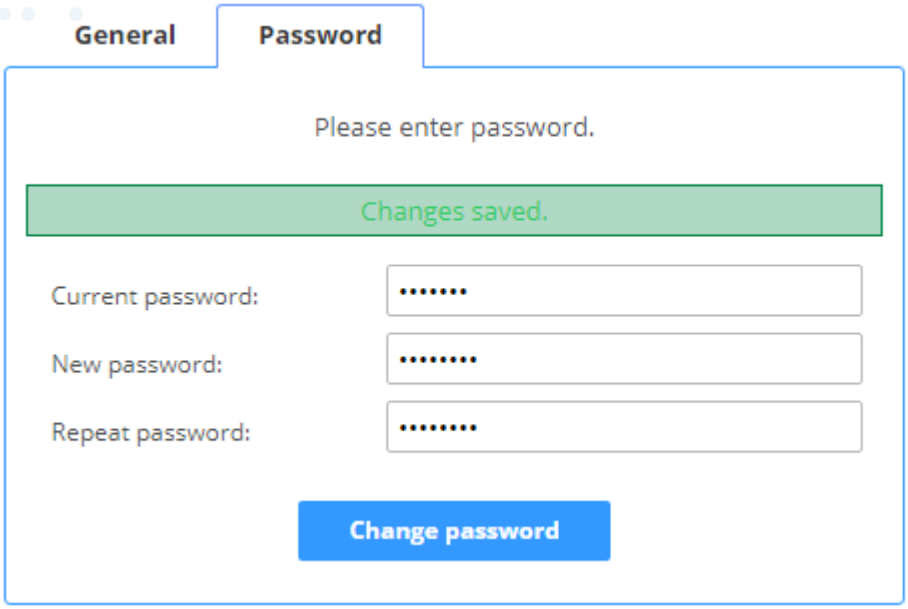
Repeat Password

Repeat the new password, entered in the field above.

Change password

After entering and repeating the new password, select ***Change password***. The new password is set and a confirmation is displayed within the Password tab.

Example


General
Password
Please enter password.
Changes saved.
Current password:
New password:
Repeat password:
Change password