efalia ecm

Version 4.1

User Guide
WinClient



efalia
smart content suite on a human scale

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Welcome to Efalia ECM

The Windows Client (WinClient) is the primary Efalia ECM application for working with documents held or to be held in Efalia ECM Cabinets. Using the WinClient, standard tasks such as document scanning, import, retrieval and editing can be carried out. In addition, the WinClient is used for advanced features such as barcode reading, zone OCR indexing and process management.

The WinClient can be used with or without a connection to the Efalia ECM server (online or offline). In offline mode many operations can be accomplished without the use of a license.

How Documents are Stored

Efalia ECM stores documents in Cabinets. There may be several Cabinets created in an organisation; a user is only allowed to work with those Cabinets to which they have been granted access.

Each Cabinet can contain several document types and Index fields are assigned to the document types, which can then be completed according to the filing requirements of the documents. The retrieval information is entered into the index field. Documents are stored with this index data for easy retrieval.

Although a user may have access to a Cabinet, they are only able to work with those 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 is only allowed to retrieve and display in a second document type.

Documents scanned in black and white are stored as TIFF; coloured documents are stored as compressed JPEG files.

Electronic documents (EDOCS) are stored in original format and can be viewed by an inbuilt viewer even if the associated application is not installed. If the associated application is installed (for example Word) documents can also be edited. Changes are stored in regular document types as revisions, with the original version of the document also remaining stored.

Installation and Basics

General Information

Efalia ECM WinClient is a Windows application and must be installed on client workstations. This can be done from the installation page or by independent software rollout. From the Efalia ECM installation page the applications can be installed and this would allow a user to work within the client applications when not connected to the Efalia ECM Server.

Note

During installation you need be logged-in with administrative rights.

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***.

Note

User accounts that have been assigned an **fd-web** licence have no access to the Efalia ECM WinClient.

Only as many users can connect to the Efalia ECM Server and logon as licences are available. After 30 minutes of idle time (this is a default value and can be changed), the WinClient will automatically log off and free the licence for another user. The number of licences can be displayed in the WinClient under ***Help*** ⇨ ***Info***. It is possible to specify more users in the Efalia ECM groups than 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 search for and retrieve documents.

Note

The ***Scheduler based passive notification*** setting can be selected in the WinClient ***Notification*** options. This setting can result in the licence not being freed by the server because the WinClient will establish a connection at the specified interval – even when the user is not using the opened WinClient. This only applies when the WinClient is open.

Prerequisites

.NET Framework

Microsoft .NET Framework 4.x must be installed before the Efalia ECM applications can be installed.

Visual C++ Redistributable Installation

Before the installation of Efalia ECM, all Visual C++ redistributables, provided in the folder ***Redist***, must be installed on all computers, Efalia ECM is being installed on.

Efalia ECM Component Service (recommended)

Efalia ECM Component Service enables the WinClient to display more than 200 file formats directly, including all Microsoft Office files, e-mails and, for example, PDF files and CAD drawings.

If the Efalia ECM Component Service is not installed, the WinClient can only display scanned documents saved in Tiff or JPEG format.

Note

Further information can be found in the relevant chapters OCR Index and Use OCR-/Forms recognition.

Efalia ECM OCR (optional)

If OCR recognition is to be done at a workstation within WinClient, ***Efalia ECM Component Service*** and ***OCR*** must be installed on this workstation computer.

This is the case, for example, if ***OCR Form Recognition*** is to be used ***in combination with scan profiles*** or the ***OCR Index*** function.

Connection to the Server

When starting the WinClient, the Efalia ECM server address may have to be entered to allow the WinClient to connect to the server. This will normally happen only when the WinClient has been installed in a method other than those recommended. Please check with the Efalia ECM administrator for the connection information.

More information on the settings can be found in the *Options Settings* chapter

Using a Proxy Server

If it is not possible to establish a connection between the WinClient and the server, the reason may be associated with a proxy server.

The WinClient is installed on to a workstation and connects and logs on to the Efalia ECM server in order to send information to, and retrieve information from an Efalia ECM Cabinet. Documents can be scanned, indexed and annotations can be applied to documents. Information about the Cabinet and the access rights are stored in the local cache of the workstation when the Cabinet is opened for the first time.

See also Local Cache.

Note

Further details can be found in the Proxy Server chapter of the ***Installation Guide***.

Online/Offline

Online Mode

When connected to the Efalia ECM server - in online mode - you can use any function allowed for you, such as searching for or sending documents to the server.

To switch from offline to online mode, click the ***Ready*** icon in the lower left corner of the WinClient window or select ***File*** ⇨ ***Offline*** from the menu.

Offline Mode

In Offline mode, the connection to the Efalia ECM server is not established. Therefore no documents can be retrieved from the server and no new documents can be sent to the server. New documents however can be created locally and local documents can be edited. If during logon for example a wrong password was specified or connection to the server failed for whatever reason a log on in offline mode is established. Make sure you are in online mode if you want to accomplish server based actions such as search, check in, etc.

The administrator can deactivate the offline-mode for users in the client configuration to force that they use the WinClient online only.

Work offline with local documents

When retrieving documents from the server, not all pages of a document are automatically downloaded to the local cache, so as to improve performance. Initially, the first page is downloaded to the local cache and then each page that is viewed. If you want to work offline with a document, all pages of the document must be downloaded to the local cache. In order to do that you must switch the mode to ***offline*** after downloading the documents. Click on the ***ready*** symbol in the bottom left corner. If there are uncompleted documents in the local cache, you are asked if you want to download all documents to work offline with them. If you confirm with ***Yes***, you can work offline with these documents.

Note

Downloaded documents which are not checked out can only be changed and checked in again if they have not already been revised and checked in by another user.

Layout 1 and 2

Online



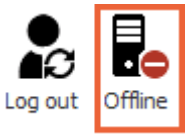
Offline



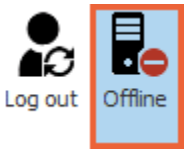
Layout 3

Using ***Layout 3***, the information is shown in the ***Start*** tab of the ribbon bar.

Online



Offine



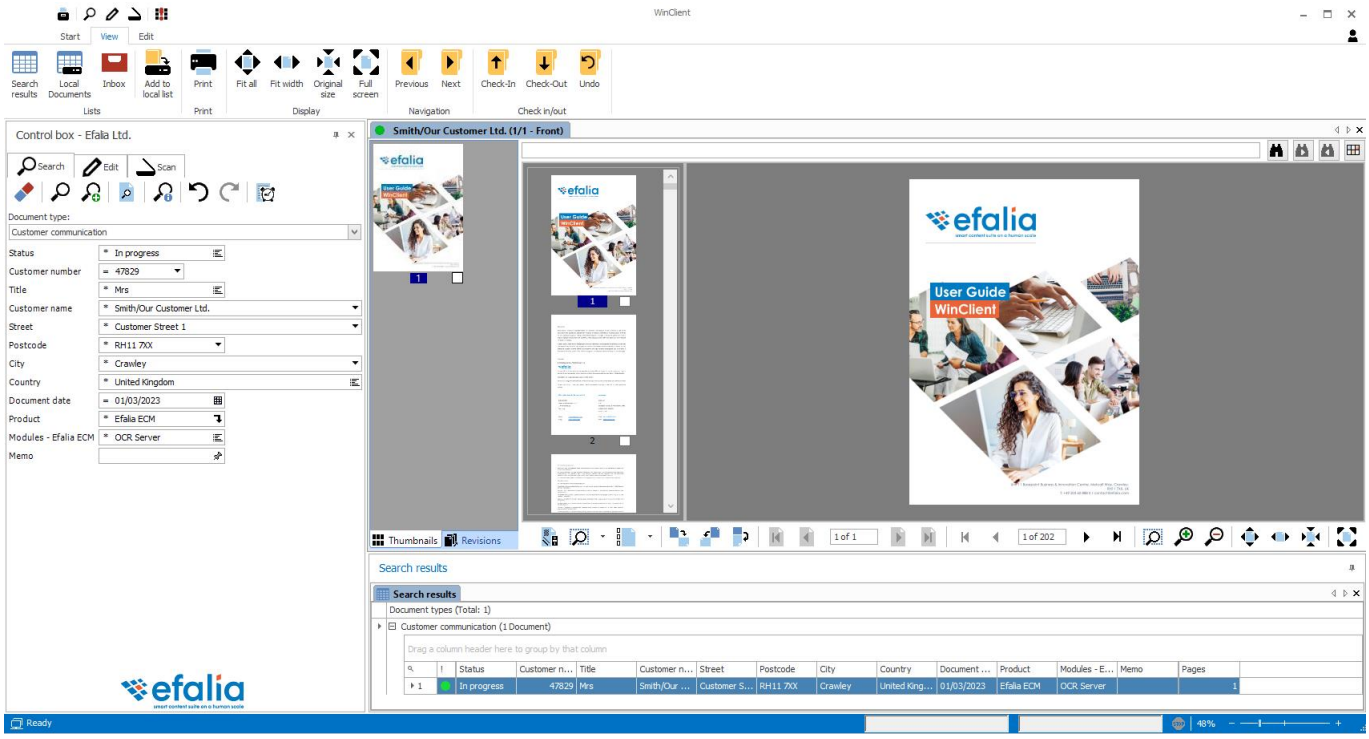
The WinClient Desktop

When opened, the WinClient commands and options are available from the displayed toolbars. Once a Cabinet is opened, the ***Cabinet Control Panel*** is displayed. When a search is performed, the results are displayed in the ***Search Results*** list. When you double click a document in that list, it is displayed in a document display window.

Efalia ECM WinClient can be run either in ***Standard*** or ***Expert mode***.

Note

First time installations of Efalia ECM WinClient (version 3.7 or later) with **Expert mode** activated.



Standard mode

In ***Standard mode***, some icons and buttons are not displayed.

Expert mode

In ***Expert mode***, the desktop of Efalia ECM WinClient provides icons and buttons used for advanced workflows, such as ***Export to CD/DVD***.

The following icons and buttons are displayed in ***Expert mode***:

Style 1 and 2

Menu bar

File ⇨ Export

Icon	Function	Icon	Function
	Export document list		Export to CD/DVD

File ⇨ Import

Icon	Function	Icon	Function
	Index and files		

Extras

Icon	Function	Icon	Function
	Adhoc workflow		Upload Status
	Reports and Scripts		AutoCapture edit index

Windows

Icon	Function	Icon	Function
	Long lists (left)		Short lists (right)
	Short lists (left)		Close windows
	Long lists (right)		

Toolbar

Icon	Function	Icon	Function
	Scanner setup		Create page from template
	New document		Restore revision

Context menu (Right mouse button)

Icon	Function	Icon	Function
	Follow document link		Duplicate document
	Create linked document		Unlink document
	Convert document		Commit phase

Style 3 (Flat black icons)

Tab Start

Business Process management

Icon	Function	Icon	Function
	Adhoc workflow		

Export

Icon	Function	Icon	Function
	Export document list		Export to CD/DVD

Import

Icon	Function	Icon	Function
	Index and files		

Extras

Icon	Function	Icon	Function
	Options		Upload Status
	Scanner setup		Log out
	Reports and Scripts		Offline

Windows

Icon	Function	Icon	Function
	Long lists (left)		Short lists (right)
	Short lists (left)		Close windows
	Long lists (right)		

Tab Edit

AutoCapture

Icon	Function	Icon	Function
	Edit form		Edit index
	Cost codes		

Documents

Icon	Function	Icon	Function
	Create page from template		New document
	Duplicate document		Restore revision
	Convert document		Create linked document
	Follow document link		Unlink document
	Commit phase		

Context menu (Right mouse button)

Icon	Function	Icon	Function
	Follow document link		Duplicate document
	Create linked document		Unlink document
	Convert document		Commit phase

Style 3 (Flat colour icons)

Tab Start

Business Process management

Icon	Function	Icon	Function
	Adhoc workflow		

Export

Icon	Function	Icon	Function
	Export document list		Export to CD/DVD

Import

Icon	Function	Icon	Function
	Index and files		

Extras

Icon	Function	Icon	Function
	Options		Upload Status
	Scanner setup		Log out
	Reports and Scripts		Offline

Windows

Icon	Function	Icon	Function
	Long lists (left)		Short lists (right)
	Short lists (left)		Close windows
	Long lists (right)		

Tab Edit

AutoCapture

Icon	Function	Icon	Function
	Edit form		Edit index
	Cost codes		

Documents

Icon	Function	Icon	Function
	Create page from template		New document
	Duplicate document		Restore revision
	Convert document		Create linked document
	Follow document link		Unlink document
	Commit phase		

Context menu (Right mouse button)

Icon	Function	Icon	Function
	Follow document link		Duplicate document
	Create linked document		Unlink document
	Convert document		Commit phase

Style 3 (3D colour icons)

Tab Start

Business Process management

Icon	Function	Symbol	Funktion
	Adhoc workflow		

Export

Icon	Function	Icon	Function
	Export document list		Export to CD/DVD

Import

Icon	Function	Icon	Function
	Index and files		

Extras

Icon	Function	Icon	Function
	Options		Upload Status
	Scanner setup		Log out
	Reports and Scripts		Offline

Windows

Icon	Function	Icon	Function
	Long lists (left)		Short lists (right)
	Short lists (left)		Close windows
	Long lists (right)		

Tab Edit

AutoCapture

Icon	Function	Icon	Function
	Edit form		Edit index
	Cost codes		

Documents

Icon	Function	Icon	Function
	Create page from template		New document
	Duplicate document		Restore revision
	Convert document		Create linked document
	Follow document link		Unlink document
	Commit phase		

Context menu (Right mouse button)

Icon	Function	Icon	Function
	Follow document link		Duplicate document
	Create linked document		Unlink document
	Convert document		Commit phase

Logged-on User

Style 1 and 2

The logged-on user is shown within the statusbar, on the bottom of Efalia ECM WinClient.

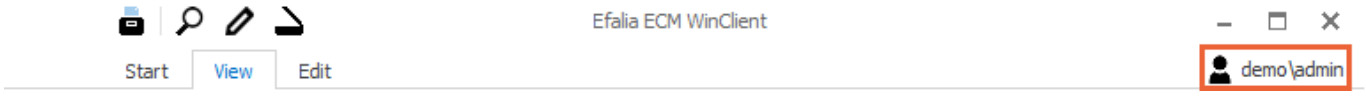
Example



Style 3

Example

The logged-on user is shown above the ribbon bar, on the top right of Efalia ECM WinClient.



Log out/Change User

A left mouse button click on the displayed user name can be used for log-out or user change.

Control Panel

When an Efalia ECM Cabinet is opened, the ***Control Panel*** is displayed. This gives the user access to document search, scan and edit functions, dependent upon the rights of the user.

Within the Control panel, the Cabinets Document Types and associated index fields will be available. How these are displayed is determined by the Cabinet configuration. By default, the Document Types can be selected from a drop down list and once selected the associated index fields will be displayed. When the Cabinet has been configured to use the Filing System, the Document Types and selected index fields will be shown in a Tree structure, with the remaining index fields shown to the right of the tree.

The tabs in the Control Panel allow switching between ***Search***, ***Edit*** and ***Scan***. The tabs will not be shown if the logged in user does not have rights to perform the tab's functions. The tools within each tab will change depending on the tab selected and provide the appropriate commands for that tab.

Conditional Colours

With this, an Efalia ECM index field, displayed in the control box, can have different background colours, according to the field value.

The background colour is adapted, when a value, matching a condition, is entered.

The displayed ***Conditional Colour*** of an index field is linked to definable conditions for field values. The set condition defines how a content of a field is interpreted for conditional colours.

It is possible to define multiple conditions for different values of an index field.

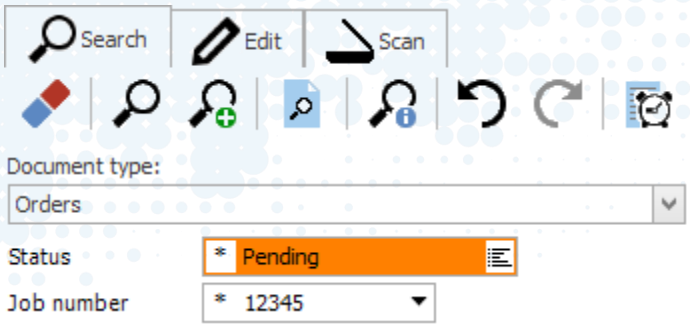
Available conditions are: ***Equal***, ***Not equal***, ***Less than***, ***Less or equal***, ***Greater***, ***Greater or equal*** and ***Range***.

Example

An Efalia ECM administrator set the condition ***Equal*** Value ***Pending*** for the index field Status in the Efalia ECM Enterprise Manager.

The selected colour for this condition is ***red***.

In this case, Efalia ECM WinClient alters the background of the field Status to orange, the very moment the field is either entered in within a search or filled in after a retrieval.



AutoCapture Fields

Document types and fields, used for Efalia ECM AutoCapture are set-up in Efalia ECM Enterprise Manager by a trained administrator.

These fields are defined in the field properties as Contains: AutoCapture and Contains-Extended: Type (e.g., Gross amount or Invoice date).

The display of the values in amount and date fields are linked with the local *language settings* of Efalia ECM WinClient.

The dependencies of the amount fields are listed below:

Language	Currency
German, French, Spanish, Portuguese	Euro
English (UK)	Great Britain Pound
English (US)	US Dollar
Japanese	Yen
Chinese (trad.)	Hongkong Dollar
Chinese (simple)	Renminbi Yuan

The dependencies of the date formats are listed below:

See : Show currency symbol.

Note

The language settings also affect the character used to separate thousands or decimals in amount fields.

Language	Format
English (UK), French, Spanish, Portuguese	dd/MM/yyyy
German	dd.MM.yyyy
English (US)	MM/dd/yyyy
Chinese (trad.), Chinese (simple), Japanese	yyyy/MM/dd

Enable/Disable Currency Symbol

The currency symbol can be disabled in the Options Settings of Efalia ECM WinClient.

Document lists

Document lists are displayed in separate tabs.

Three different document lists are available:

Note

The dependencies of language settings and displayed values of AutoCapture fields are also effective in Efalia ECM WinClient document lists.

Search results

The Search results list shows the documents found on the server as a result of a a search operation. In order to perform a search, the WinClient must be in online mode.

Local documents

The Local documents list shows documents stored on your local workstation, for example new documents which are not yet checked-in to the Efalia ECM server.

Documents downloaded from the server are also stored here as local copies. In addition, documents that have been viewed are stored in the local cache.

The default name ***Local Documents*** can be customised within a Cabinet configuration, and therefore may be different from the default.

Note

When Start ⇨ Options ⇨ Cache ⇨ Purge cache after program end is specified, all documents are automatically deleted from the local cache when closing the WinClient. This does not apply to checked-out or downloaded documents. If the WinClient is not closed, the cache data is automatically deleted after 12 hours, when this option is selected.

Inbox

The Inbox contains documents which are sent to a user by other Efalia ECM users or which have been automatically sent to a user by a process.

Document Display Window

Documents are shown in the document display window. When Efalia ECM Component Services is not installed, the WinClient can only display scanned documents save as TIFF or JPEG. When Component Service is installed, over 200 file formats can be displayed, including all Microsoft Office formats, emails, PDF and CAD drawings.

Annotations can be applied to documents within the document display window.

Arrange Windows

Default layouts for the control panel, document display window and document lists can be selected from the ***Windows*** menu or from the ***Windows*** tools on the ***Start*** toolbar, depending upon the display layout selected. This offers several options as to how the windows are displayed.

Note

The buttons of the group **Windows** are part of the Expert mode.



Toolbars

The configuration of the toolbars bars can be defined, if allowed for the specific user. An Efalia ECM administrator can predefine the menus and the options for the users, so that no changes are allowed for the client.

A full description of the toolbars is given within the *Toolbars Chapter*.

Index Capture Window

The Index capture window will be displayed when a document is being imported into Efalia ECM by the following methods; drag & drop, Send to Efalia ECM, Office Link and by using the ImagePrinter.

The Image Capture Preview window will show the document being imported, or the document that is being appended or prepended to.

Using this window the document can have index data applied to it and then be saved.

Split Documents

Selecting split document will split a multipage document into single-page documents. For each of these newly created single-page documents a new capture window opens, once the previous one is closed. This allows each page to be classified separately.

The resulting single-page files are added to the local documents list in the WinClient.

Note

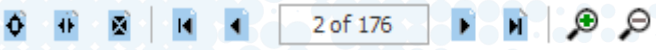
This option does not split a single electronic document, such as a Word document. It can however split multiple electronic documents.

Multi-page PDF Documents

If multi-page PDF documents are imported by the following methods; drag & drop or Send to Efalia ECM, a thumbnail area is added to the document preview area.

A toolbar, displayed above the document preview area, offers options to browse through the document.

Toolbar



Icon	Function	Icon	Function
	Fit all		First page
	Fit width		Previous page
	Original size		Next page
	Zoom in		Last page
	Zoom out		

Example

Entering a valid page number of document into the box on the right hand side, displays this side instantly.



After entering **6** and pressing ***Return***, ***page number 6*** of the active document is being displayed.



Example

All pages of a document are checked by default.

Using the checkbox below each thumbnail, individual pages of a PDF document can be deselected.

If a page is selected for import, a yellow bar and a ticked checkbox below the thumbnail will show it.

 Page 1 has been selected.

 Page 1 has been deselected.

A corresponding context menu allows a quick selection/deselection of all pages at once or toggling the selection.

The context menu can be opened by a right mouse click on a thumbnail.

Context menu

Icon	Descripton
	Select ***all*** pages of a document
	***Remove*** selection
	***Toggle*** selection

Save

All pages of a PDF document deselected

If all pages of a PDF document are deselected, a save process will be impossible.

Efalia ECM WinClient displays a notice that the document has no pages.

All pages of a PDF document selected

In case all pages of a PDF document shall be stored, simply a corresponding cabinet and document type must be selected from the drop-down menus on the left hand side. Afterwards, the corresponding index values must be typed into the index fields, shown below the selected cabinet and document type.

The operation must be confirmed by selecting ***OK***.

The index capture window is being closed unless no further documents are pending.

The processed document is now on the local documents list or checked-in directly, depending on the settings of Efalia ECM WinClient.

Selected pages of a PDF document

In case only selected pages of a multipage PDF document shall be stored as an Efalia ECM document, the not required pages must be deselected, using the checkboxes below the thumbnails.

Afterwards, the corresponding cabinet and document type must be selected from the drop-down menus on the left hand side and the corresponding index values must be typed into the index fields, shown below the selected cabinet and document type.

The operation must be confirmed by selecting ***OK***.

The processed document is now on the local documents list or checked-in directly, depending on the settings of Efalia ECM WinClient.

A pop-up window is displayed and the user is asked how Efalia ECM WinClient shall proceed with the remaining pages of the document.

Pop-up Window

Do you also want to archive the non-selected pages?

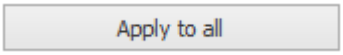
Yes

The index capture window is displayed.

No

The non-selected pages of the PDF document are discarded and the work with Efalia ECM WinClient can be continued.

Apply to all



Example

All documents, one after another, are displayed within the index capture window, again, beginning with the document, where ***Apply for all*** has been selected.

In this example, 5 documents are sent to Efalia ECM WinClient.

The first two documents are indexed with individual values. As from the third document, the given index values should be also applied to the fourth and fifth document and the entered values are confirmed by ***Apply to all***.

First Steps

Open a Cabinet

A Cabinet can be opened manually or automatically when the WinClient is started. Cabinet settings are downloaded to the local cache when it is opened. This can only be done when the WinClient is connected to the Efalia ECM Server. Once the settings are cached, the Cabinet can be opened when connected, or when using offline mode.

Open Cabinet Manually

Selecting ***Start*** or ***File*** ⇨ ***Open*** ⇨  ***Cabinet*** will display a list of available Cabinets. Double-click the Cabinet name, or select it and press the ***OK*** button to open the Cabinet.

Open Cabinet Automatically

A Cabinet can be opened automatically when the option *Open last used Cabinet* is selected within the WinClient ***Options***. The Cabinet that was open when the WinClient was last closed will be automatically opened.

Open Document Lists

When a Cabinet is opened, the Local Documents list is automatically opened, if there are any documents that are currently being stored locally, such as new documents, or ones that have been checked-out from the server for revising.

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. These settings are described in more detail in the **Installation Guide**.

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.

Local Document List

The Local Document List can be opened by selecting ***File*** ⇨ ***Open*** ⇨ ***Local Documents***, or by selecting the ***Local Documents*** tool on the ***Display*** toolbar.

Inbox

The Inbox can be opened by selecting ***File*** ⇨ ***Open*** ⇨ ***Inbox***, or by selecting the ***Inbox*** tool on the ***Display*** toolbar.

Closing Document Lists

Each of the document lists can be closed by pressing the ***X***, top right of the list display.

Toolbars

Most WinClient actions can be selected using the tools available on toolbars. The tools displayed, and how they are displayed can be configured by the user, or centrally by an Efalia ECM administrator.

Note

The default toolbar icons shown, depend on the selected mode.

Tool Style

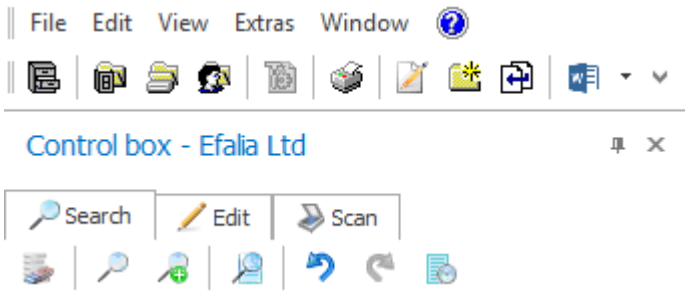
The style in which the tools and menus are displayed is set within the ***Layout*** tab of the WinClient ***Options***.

There are three styles available; ***Style 1***, ***Style 2*** and ***Style 3***.Select the required style from the *WinClient Layout* dropdown.

In Styles 1 and 2, the main toolbars remain the same, but the toolbars within the Cabinet Control Panel will differ. In Style 3, the toolbars and Control Panel tools will change, and there will be no menu bar.

Style 1

An example of Style 1 is below. Hovering over a tool will display a tooltip. The available tools can be customised within the WinClient by selecting the arrow at the end of each tool set.



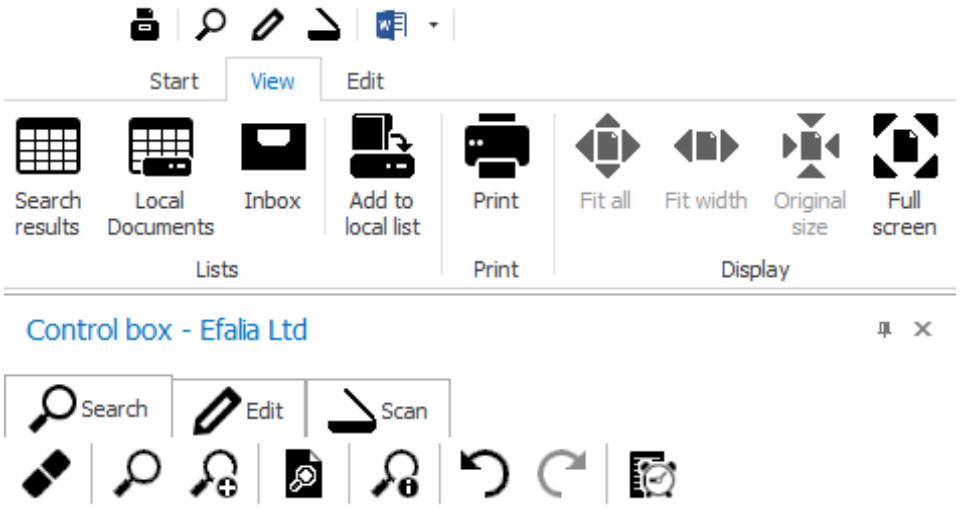
Style 2

An example of Style 2 is below. Hovering over a tool will display a tooltip. The available tools can be customised within the WinClient by selecting the arrow at the end of each tool set.



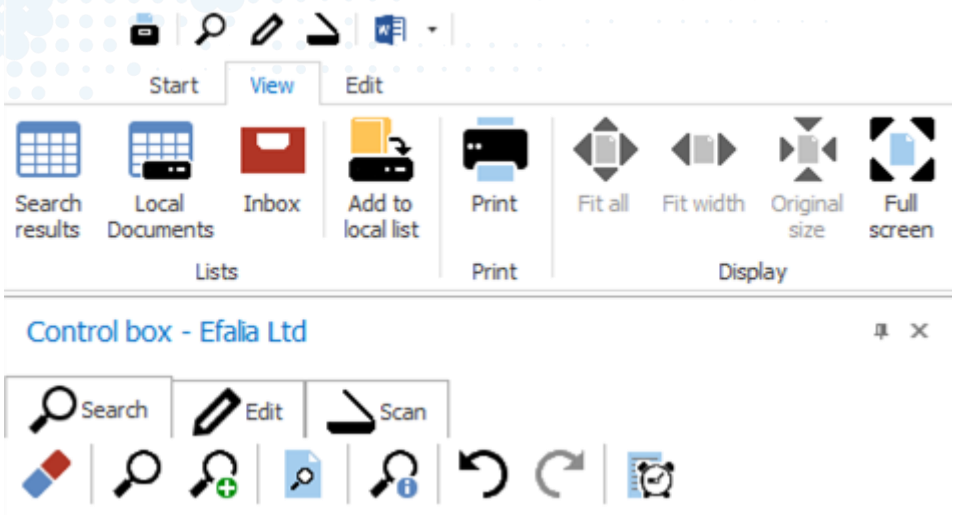
Style 3 (Flat black icons)

An example of Style 3 is below. Hovering over a tool will display a tooltip. The available tools cannot be customised within the WinClient.



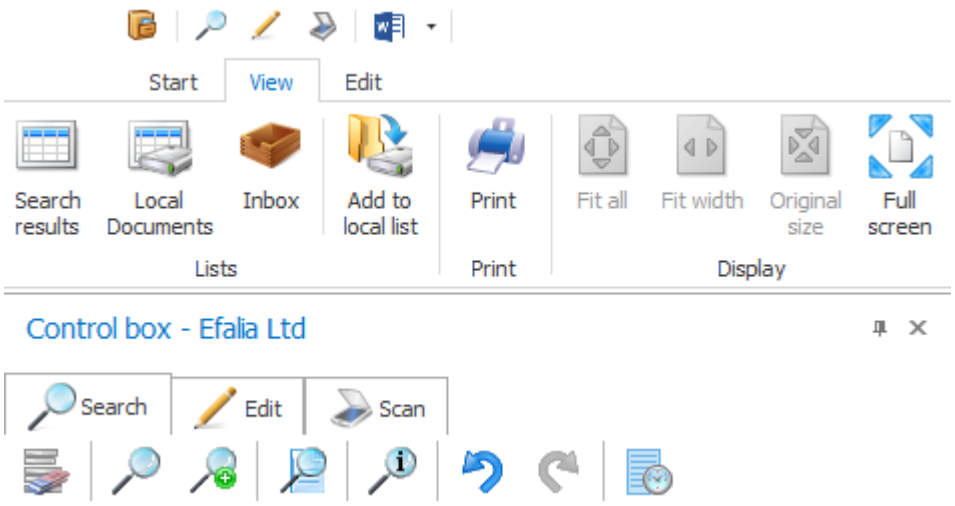
Style 3 (Flat colour icons)

An example of Style 3 is below. Hovering over a tool will display a tooltip. The available tools cannot be customised within the WinClient.



Style 3 (3D colour icons)

An example of Style 3 is below. Hovering over a tool will display a tooltip. The available tools cannot be customised within the WinClient.



Configure Toolbars

The configuration of the toolbars can be tailored by each user, if the security settings allow this. The rights can be set by an Efalia ECM administrator. The administrator can also predefine the menus and the options for the users, so that no changes are allowed by users.

The configuration options are not available when ***Style 3*** is selected as the WinClient Layout.

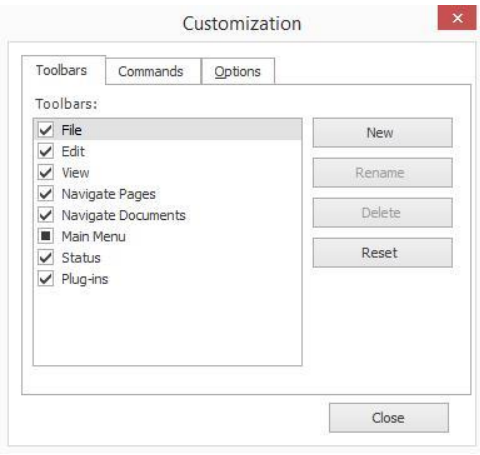
When there are small arrows between the toolbars, the tools available can be modified. If no arrows exist, it is possible, with sufficient rights to use the setup menu by double clicking the free area of that bar.

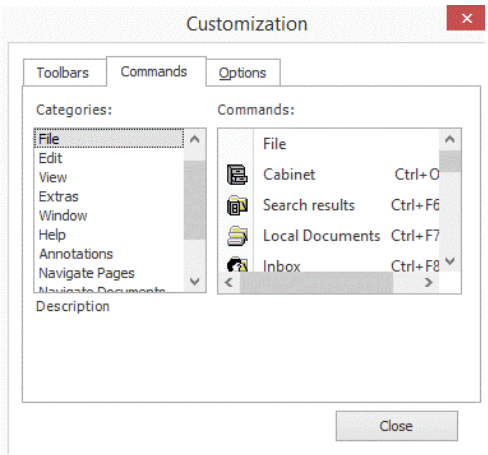
Switch Button Bars On and Off

Using ***Add/Remove Buttons***, each toolbar option can be turned on or off by highlighting the option, and single-clicking. When the tick to the left of the toolbar option is present, it is selected, and the tool will be displayed.

Customised Button bars

User defined toolbars can be created by selecting ***Customise*** from ***Add or Remove Buttons***.





Create or select the custom toolbar from the ***Toolbars*** tab. If the toolbar has a tick to the left, then it will be displayed. To add tools to the bar change to the ***Commands*** tab, and after selecting a category, drag the required Commands to the toolbar.

Toolbar Options

Several options for toolbars can be configured by selecting the ***Options*** tab. Options available include whether to always show full menus, or only shown them after a short delay, and whether to use large icons on the toolbar rather than standard size icons. You can also select whether to display toolbar tooltips.

Searching for Documents

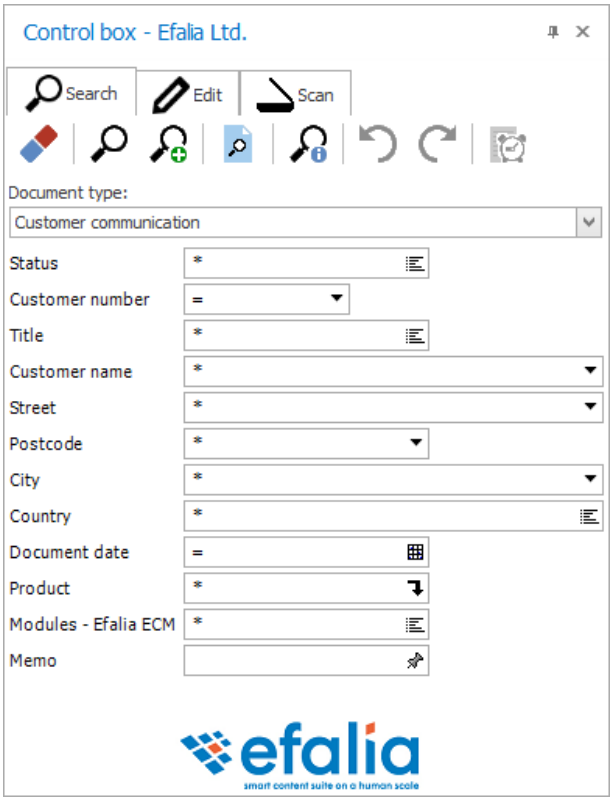
All searches for documents held within a Cabinet are performed using the ***Search*** tools in the Cabinet Control Panel. Searches can be performed within one Document Type or across all the Document Types a user has rights to.

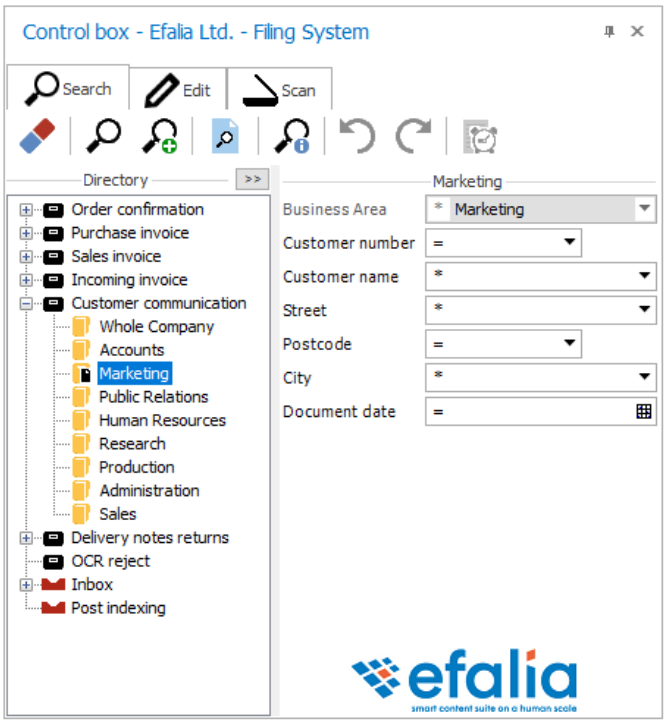
Documents can be searched for using the index data entered against each document, or by searching the contents of the documents themselves by using full text search. For full text search, the OCR Server option is required, and must have been configured to OCR the relevant Document Types.

Control Box

Example Cabinet Control Panels are shown below, with the ***Search*** tab selected.

Index structure (Default)	**Index structure (Filing System Designer)**





Search Tools

Clear Index Fields

This tool will clear any information shown within the index fields. Using this tool within the ***Search*** tab 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.

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.

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 can be performed by right-clicking on 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.

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, or across all Document Types the user has rights to by selecting the appropriate tool, available to the right 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.

Info Search

The ***Info*** search tool will extend the available index criteria that a document can be searched for against. When a document is stored in Efalia ECM, it automatically has certain data stored with it, such as its creation date within Efalia ECM. The following criteria will be made available when ***Info Search*** is selected:

Created by

Created on

Archived on

Modified by

Modified on

Checked-out by

Checked-out on

State

Pages

Identifier (GUID)

The entry fields for these properties appear in the toolbox below the standard index fields of the selected document type.

Previous/Next Search

The search criteria used during a session is stored by Efalia ECM. During the session, a user can browse the searches performed and reuse them. Select the relevant search information by browsing through the stored list with ***Previous Search*** or ***Next Search***. The criteria for each search will be shown in the index fields.

Search history



The button ***Search history*** opens the area ***Tasks***, on the right hand side of the image.

The button either becomes selectable after a minimum of two searches or after a search was stored permanently in ***Search history***, before.

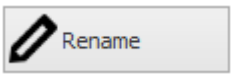
The ***Search history***, in the upper area, lists all searches performed within the active session. The searches are stored temporarily, except the searches stored permanently by using ***Rename***.

Here, the temporarily stored searches are named ***Search 001***, ***Search 002***, etc.

Note

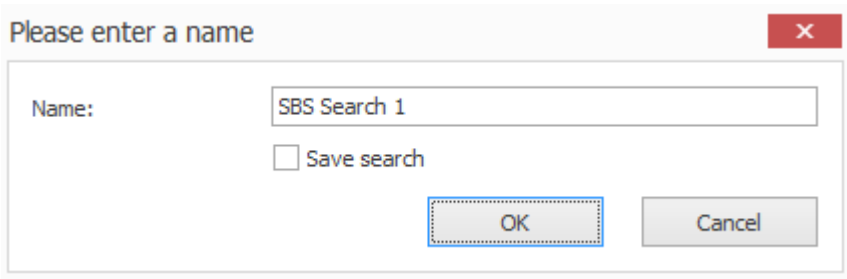
A WinClient session ends when the user switches to another cabinet or closes the Efalia ECM WinClient.

Rename

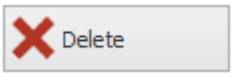


The button ***Rename*** allows saving a temporary element from the list ***Search history*** under a specific name.

All renamed entries are converted into permanent available entries, linked with the Efalia ECM user account.

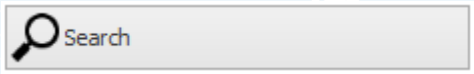


Delete



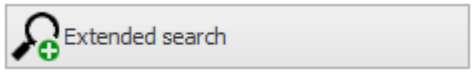
The button ***Delete*** removes a selected entry from the list.

Search



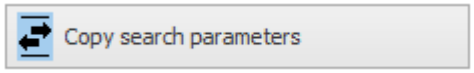
The button ***Search*** in the ***Search history*** panel starts a search within the document type and parameters of the selected entry.

Extended search



The button ***Extended search*** in the ***Search history*** panel starts a cabinet search, using the parameters of the selected entry.

Copy search parameters

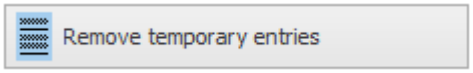


The button ***Copy search parameters*** copies the parameters of the selected entry into the control box of Efalia ECM WinClient.

Now, the copied parameters can be adapted before the new search is run from the control box.

As soon as the adapted, new search is run through the control box button ***Search***, a new, temporary entry is added to the ***Search history***.

Remove temporary entries



The button ***Remove temporary entries***, removes all temporary entries of the ***Search history*** list.

The entries permanently saved by using ***Rename***, are not deleted.

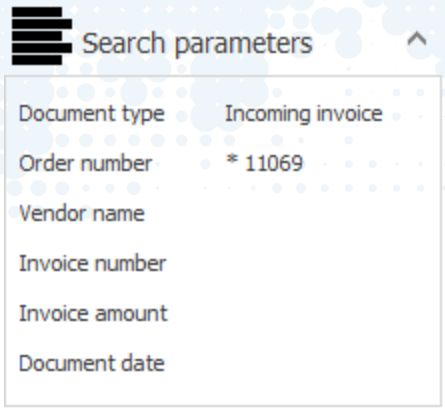
Clear list



The button ***Clear list*** removes all entries of the ***Search history*** list.

Using this option, all entries, temporary and permanent, are deleted

Search parameters



Within the area ***Search parameters***, the parameters of the selected Search history entry are shown.

The first line shows the document type. The following lines list the corresponding field of the document type on the left hand side. On the right hand side, the value is shown, used for the selected search.

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.

Parameter	Description
<>	Not equal search

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 using OR Combinations

When several words are entered into an index field, the search is performed with a logical OR link between these words.

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 Gray Graye

The search is carried out for all single words entered; and the index field contents will have to match one of the names searched for.

If a document has been stored under ***John Grey***, it will not be listed with this search. The search operation can only be performed with a wildcard search: ****Grey***.

Note

When using an Oracle database this function is not available.

Normally only an **asterisk *** is attached.

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.

MRU Lists

The Most Recently Used (MRU) list holds search entries that have previously been used. Using these, you can reuse the search criteria without having to retype it. The list can be opened with ***ALT*** ⇩. Using the mouse, the drop down list can be viewed by clicking the arrow on the right side of the index field.

Clear MRU list

The MRU list keeps up to 32 entries. As soon as the list is full the last entries will be overwritten automatically. If you want to delete MRU-list, select ***Start*** ⇨ ***Options*** ⇨ ***General*** ⇨ ***Clear MRU-List.***

Keyword lists

When an index field has been set to use keywords the keyword list entries can be selected directly. Using the keyboard this list can be opened by ***ALT*** ⇩ .

Shortcuts can be used for keywords which will avoid having to type complete keyword values and accelerate keyboard entry.

Several keywords can be selected simultaneously by checking them in the drop down list. They are entered into the index fields separated by semi colons. The keywords can be listed by clicking on the icon at the end of the keyword field.

Note

If keyword lists are configured so that manual entries are possible, these manually entered keywords are held in the local cache of the relevant user.

Date entry

When a date is to be entered, a calendar opens up 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

Memo fields

When a field is configured as a memo field, it can be opened by clicking on the Pin symbol at the end of the field.

ODBC database links

With ODBC links index fields can be automatically filled with data held in an external database when a unique index value is entered in the field configured as an ODBC link field.

If for example a client number is entered, the client name and address can be automatically added from a connected database to the index fields, while scanning or when in ***Edit*** mode.

The connection of the index fields to a database must be configured as an ODBC connection on the Efalia ECM server by an administrator.

Manual indexing using OCR zone recognition

Manual OCR recognition can be performed on an area of an image and the data read can be inserted into an index field. This function required an OCR Server licence.

Please see the section on the Annotations (OCR Index).

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, AND 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*.

AND NOT function:

When looking up ***invoice AND NOT Mueller***, all *documents containing the word* ***invoice*** *but NOT* the word ***Mueller*** are listed.

Full text search combined with index fields

A full text search can be combined with an index field search. If the index fields are filled out in addition to the full text search, the result of the search will be limited.

Search within a Document

When displaying a document that is within a Document Type set for full text OCR, a search can be performed within the document. At the top of the document display window a search bar is available. To search, enter the search word, and then press the ***Search*** tool to the right of the bar.

If found, the word searched for will be highlighted wherever it occurs in the document. If there are multiple occurrences, using the ***Next*** and ***Previous*** tools on the search bar, each occurrence can be displayed.

Additionally, the highlight colour can be changed by selecting the ***Choose Colour*** tool on the Search bar, and then selecting the colour required.

Note

When a search for a term is performed in the full text that is also found in one of the index fields, a page may be displayed that does not include the term in the text on the displayed page. The reason is that index data will be written to the full text. It is therefore possible to find documents via index terms and via the full text.

Document Type Views

Individual settings for users and groups for the fields in the control box and the Search Results list in the WinClient for a Document Type can be configured. This is done by an administrative user within Enterprise Manager.

These settings can be defined for the Search and Edit/ Scan tabs separately.

Views can be configured that will determine the fields from the Document Type that will be available to the users, and the order in which they are displayed. Additionally, either separators or group separators can be added, to group fields together in the Control box.

Document Lists

The three different document lists in WinClient serve different purposes and allow the processing of documents in different ways. A document may appear simultaneously on different lists, for example as a server document and as a local copy on the local documents list.

Line Colours

The background colour of lines in the Document Lists can be set, depending upon the value held in a field. This can be set within the Efalia ECM Enterprise Manager.

The displayed line colour depends on field values specified in Enterprise Manager. The options are that a value held in the field should be: ***Equal to***, ***Not equal to***, ***Less than***, ***Less or equal to***, ***Great than***, ***Greater or equal to***, between a ***range***.

Multiple conditions can be set so that different colour backgrounds can be used

In case multiple fields with different colours are defined within a single document type, the last field of a document type, defined for line colours and matching with a definition determines the line colour displayed in Efalia ECM WinClient.

Search Results List

The results of a successful search has been performed are displayed in the Search Results list. If this list is already open, it is updated with the relevant results. This list will only be displayed if the WinClient has an active connection to an Efalia ECM Server.

If the search is performed in a single document type, only documents stored in that document type are listed. If the search is performed over all document types assigned to the relevant user, the search results are listed separately for each document type. The name of the document type and the number of documents found is displayed.

For each document the document status is displayed, which gives a quick overview of which documents are available and which documents have been checked out a user.

The document list can be sorted within each document type by selecting the relevant column header. Documents are displayed by double clicking on the relevant list record.

Full Text Search Results

When performing a full text search, the results will be displayed in the Search Results list. 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 MS Word documents and PDF's are included in the search, however, when selecting a document to view, page 1 of the document will always be displayed.

Local Documents List

The documents displayed in this list are stored locally on the workstation, and may be new documents, documents checked out for editing, or those that have been downloaded by the user.

New documents scanned, imported or sent to Efalia ECM are shown and displayed in the local documents list before they are checked-in and sent to the Efalia ECM server. Documents which have been checked out and documents for which a local copy has been created are also displayed in the local documents list.

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

The document list can be sorted within each document type by clicking the relevant column header.

Documents are displayed by double clicking the relevant list record.

The default name ***Local Documents*** can be customised within a Cabinet configuration, and therefore may be different.

Inbox

The documents displayed in this list are sent to a user by other Efalia ECM users or are sent automatically by processes, if the user has been specified as a recipient in a process.

For documents to be received from other users or from processes the WinClient must be connected to the Efalia ECM server.

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 in order to move a document to the next process step.

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

If a document is received, the Inbox must be refreshed. In *Start ⇨ Options ⇨ Notification* an automatic notification can be specified if a new document arrives on the personal list. Press ***F5*** to refresh the personal list manually.

Note

During the specified scheduled intervals a contact is established to the server and the client licence used is not released until the WinClient is closed.

Document Lists Display

By default, the document lists are displayed as tabs, and one list can be viewed at a time.

By right-clicking on a tab a user can select to display the lists horizontally or vertically, so that the contents of each list can be viewed at the same time. In Tab groups can be defined. As soon as two tabs are displayed for the document lists (for example search list and local list), a tab group can be created by right-clicking and selecting ***New horizontal tab group*** or ***New vertical tab group***. A new area appears with the document list marked previously. The lists can be moved using drag and drop from one group to the other or from the context menu using ***Move to previous/next tab group***.

Document Status

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

New

Documents with the status ***New*** are stored locally on the computer and have not been checked in to the Efalia ECM server. They are only available for this specific user on this workstation and only appear on the local documents list.

Archived

Archived denotes that a document is checked in to the Efalia ECM server. In order to be edited or changed a document has to be checked out to prevent other users from changing it simultaneously. Depending on the configuration this can be done manually or automatically. Documents with this status can appear on all three lists.

A document with an ***Archived*** status is downloaded from the server if it is displayed on the search list. If an archived document appears on the local list, it is a local copy downloaded to the PC. They are also still displayed on the local list after checking in if a local copy is maintained. In this way, documents can also be displayed without an active connection to the server.

See: Options ⇨ General settings

Checked out

A document is displayed as ***Checked Out*** if it has been checked out from the Efalia ECM server by the current user. During this process a copy of the document is automatically created and displayed on the local document list. This status is displayed for each checked out document listed in your personal list. For other users these documents are displayed with status Read only and cannot be edited.

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. This status can appear in all three document lists.

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**.

Attention

Checking-In of previously checked out documents is not possible. They must be removed from the local list and must be checked out again for editing during the specified scheduled intervals, a contact is established to the server and the client licence used is not released until the WinClient is closed.

Send

Sending is displayed for all documents currently being sent to the Efalia ECM server. These are either new documents being checked in for the first time or previously checked-out documents which are checked in again after editing is complete. This status can appear in all three document lists.

Deleted

Deleted documents from the server can be shown by selecting ***Info search*** on the ***Search tab*** of the ***Control box*** and selecting the entry ***Deleted*** in the field ***State***. Performing a search will show the deleted documents, they can be undeleted by right-clicking and choosing ***Undelete***.

Field "Status"

The ***Status*** field on the local documents list can display information on issues that may have occurred when attempting to check-in a document. As an example, if a user attempts to check-in a document when a field must have an entry, but is left blank, the document will not be checked-in and the field will show the reason for this.

The information shown can be incorrectly entered mandatory fields or a field that should be checked for validity by the server (e.g. if a valid date is used).

Note

The behaviour of documents during Check-In and Check-Out depends on various settings. Different automatic actions can be configured. For more information, read the chapter Check In and Check Out.

Display Modes

The document lists can be displayed in a variety of ways depending upon user preference. A user can determine the way that multiple Document Types are displayed, and how documents lists within a Document Type are shown.

Document Type Lists

Default View

Each document list shows the documents grouped by document types and all document type groups are in dropped down mode. The number of document types is displayed at the top of the list.

If an extended search is performed, all document types are listed.

Detail View On/Off

Using the ***Toggle Detail View*** tool the list can be switched between detailed view and list view of the document types.

Drop down document list

To drop down a document type list, click the Plus symbol, which is located on the left of the document type name.

Minimise document type list

To minimize a document type in a document list, click the ***Minus*** symbol, which is located on the left of the document type name.

Display only one document type

To display only one document type in the list, click the ***Spyglass*** symbol to the left of the column headers of the document type.

Display all document types

To display all document types in the list, click the ***Cross*** Symbol to the left of the column headers of the document type.

Document Lists

Sort ascending/descending in a document type

The documents in a list of document types can be sorted by any column. Click on the relevant column. Another click on this column header toggles the sort order.

Alternatively, ***Sort ascending*** or ***Sort descending*** can be selected in the menu which opens when right clicking on the column header.

After a search has been performed, the result can be re-sorted via the column sorting by holding the ***Shift*** Key.

Changing the column order

The order of the columns of a document type can be changed by dragging and dropping a column header to the new position.

Changing the column width

The width of a column displayed in a document type can be changed.

Method 1:

Move the mouse cursor to the dividing line between the column headers. The mouse cursor will then change to a double headed arrow. By holding down the left mouse button the dividing line can now be moved.

Method 2:

Move the mouse cursor to the column header of the column to be changed and right-click. Select Best fit, which automatically fits the width of that column. When selecting ***Best fit (All columns)*** all columns of that document type are automatically adjusted.

Runtime Column Customisation

If a document type uses a large number of fields, they may be unreadable because they are too narrow depending on the monitor size and resolution. It is possible to select certain columns for display and make others temporarily hidden. Right-click on the column header and select ***Runtime Column Customization***. A small window appears into which index field columns can be dropped using drag and drop. These will not be displayed. In order to display all columns again, minimize the list and then change to ***detailed view***.

Open list

To open a group of columns for document display click the ***Plus*** box, on the left of the Document Type name.

Minimize list

To close a group of columns in order to hide the document list, press the ***Minus*** box, on the left of the Document Type name.

Column Filter

For each column a drop down arrow is displayed. Filters can be defined for the index data listed in this column. The list can be filtered for blanks, non-blanks or values returned by the initial search.

Custom filters can also be configured which can filter the index values of a column for certain ranges:

Group lists using column header

Lists in Efalia ECM WinClient can be grouped using the column header.

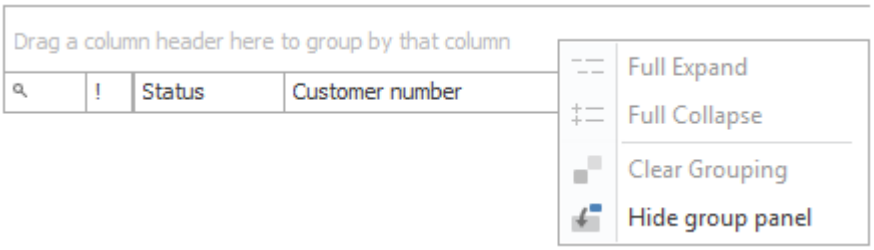
Simply drag a column header of a list to the top section of the list and the list is grouped by the selected header.

Multiple column header can be used for grouping.

Each selected header represents a grouping level.

Grouping of Lists (Context menu)

The context menu, which can be opened by pressing the right mouse button in the area above the list, contains the following options:

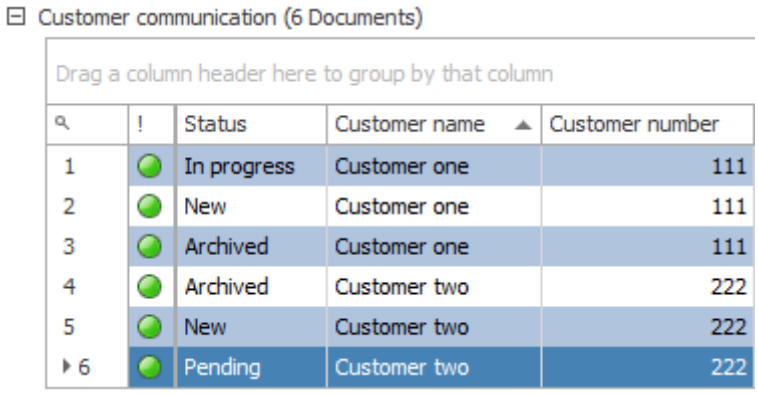


Example

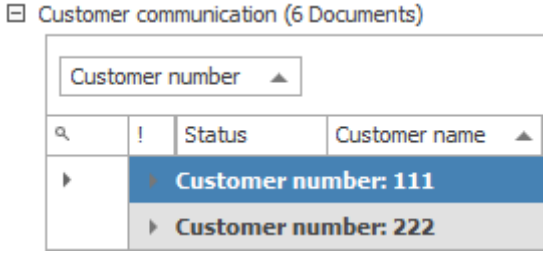
Search result sorted by Customer number

Icon	Option	Description
	Full expand	Provided that a grouping has been defined, all groups on the corresponding list are expanded.
	Full collapse	Provided that a grouping has been defined, all groups are minimised.
	Clear grouping	All grouping elements are cleared and the list is displayed in default sorting.
	Hide group panel	Hides the grouping area above the headers of the lists. Note: The group panel can be displayed, using the context menu of a list header.

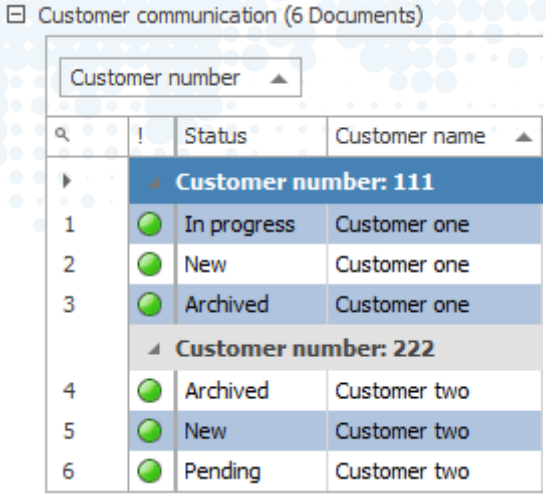
Original list sorting



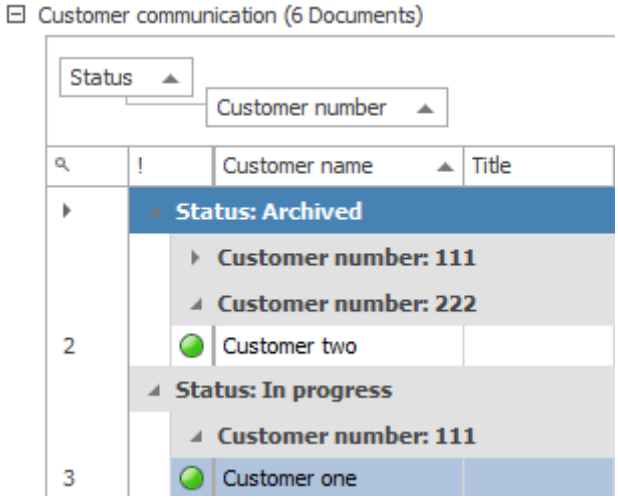
Compressed



Expanded (Single header)



Expanded (Multiple header)



Selecting documents



Among the general selecting procedures you can use commands from the right-click mouse menu within a document list.

The options are:

Icon	Function	Shortcut	Description
	Select All	CTRL+A	All documents are selected
	Toggle	CTRL+T	Current selections are reversed
	Remove	CTRL+R	All documents are unselected

Summarize Column

When a document list contains a field that holds numeric values, the total value held in that field for all the records displayed can be calculated. To do this, right-click on the field in the document list and select ***Summarize column***. The total value will be displayed in a pop-up window.

HyperLink

When a URL has been added to a field that has a HyperLink setting, the URL hyperlink will be displayed in the Document Lists, and can be clicked on to open the URL location.

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 WinClient has extensive display utilities. If installed alone it is able to display TIFF and JPEG files, the formats used to store black/white, greyscale and colour scanned documents.

When the ***Efalia ECM Component Service*** is installed, the WinClient is able to display more than 200 different file formats including all Microsoft Office formats and several CAD drawing formats.

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

When Component Service is installed and you want to display a page, you can retrieve the document and browse through it.

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

When the Component Service is not installed, these files are displayed as icons and the relevant application, or a third-party viewer must be available in order to display them.

Display Layouts

When a document is opened in the Display window, the default view shows the document thumbnails and the first page of the document. There are also several other views that can be selected, and can also be defined as the default view by an Efalia ECM administrator.

Thumbnail Size

When thumbnails are displayed, the size at which they are displayed can be selected. The default size is 100%, but the thumbnails can also be displayed at 125% and 150%. Select the required display size by clicking on the relevant button at the bottom of the thumbnail display.

This feature may have to be enabled by the addition of the following key to the WinClient configuration file ***app.xml***

```
<add key="FastpicZoomAllowed" value="True" />
```

Thumbnails Only



This view will display the thumbnail images of the document pages only. Double-clicking on a thumbnail will display the page. You can return to the thumbnails by double-clicking on the displayed page. The thumbnails can be scrolled through using a mouse wheel. A tooltip displaying the image filename will be displayed when the mouse is hovered over a thumbnail.

Each thumbnail has a check box below it so that specific pages of a document can be selected.

Coverflow



Coverflow allows you to easily page through documents, and to move from one document to another, especially when using a touchscreen. To select Coverflow, a document must already be opened in the document display window.

When selected, all pages of the document are available in the display window, with up to seven pages visible at one time. The selected page is displayed in the middle of the display window, with preceding and succeeding pages shown to the left and right of it respectively.

You can move back and forth through the document by using the mouse and clicking to the left or right of the selected page, or, when using a touchscreen, swiping left or right of the currently selected page.

You can move to the previous or next document by clicking or pressing on the icons shown at the beginning and end of the document.

Note

Coverflow is suited for documents with a small number of pages as the whole document is downloaded from the Efalia ECM server prior to it being displayed. Documents with a large number of pages may take some time to display.

Image Only



Using this view will display the document pages only. Thumbnails will not be displayed. Double-clicking on the displayed page will change to the Thumbnails Only view. Double-clicking on a thumbnail will display the page.

Thumbnails and Image



This view displays thumbnail images of the document pages, and the selected page of the document. By clicking in the thumbnails pane, the thumbnails can be scrolled through using a mouse wheel. A tooltip displaying the image filename will be displayed when the mouse is hovered over a thumbnail.

Each thumbnail has a check box below it so that specific pages of a document can be selected.

Thumbnails and Images



The thumbnails of the document pages will be displayed together with two pages of the document at the same time. When this layout is selected browsing through the document using ***Next/Previous*** page will move one page at a time. By clicking in the thumbnails pane, the thumbnails can be scrolled through using a mouse wheel. A tooltip displaying the image filename will be displayed when the mouse is hovered over a thumbnail.

Each thumbnail has a check box below it so that specific pages of a document can be selected.

Thumbnails and Book Mode



The thumbnails of the document pages will be displayed together with two pages of the document at the same time. When this layout is selected browsing through the document using ***Next/Previous*** page will move two pages at a time. By clicking in the thumbnails pane, the thumbnails can be scrolled through using a mouse wheel. A tooltip displaying the image filename will be displayed when the mouse is hovered over a thumbnail.

Each thumbnail has a check box below it so that specific pages of a document can be selected.

Duplex View



The thumbnails of the document pages will not be displayed. Two pages of the document will be displayed at the same time. When this layout is selected browsing through the document using ***Next/Previous*** page will move one page at a time.

Book Mode



The thumbnails of the document pages will not be displayed. Two pages of the document will be displayed at the same time. When this layout is selected browsing through the document using ***Next/Previous*** page will move two pages at a time.

Toggle Thumbnails On and Off

In all the display layouts apart from Thumbnails Only and Image Only, you can toggle between displaying the thumbnails and images, or just the thumbnails by double-clicking on the displayed page or the thumbnails. When thumbnails are displayed, they can be scrolled through by using a mouse wheel after single-clicking in the thumbnails pane.

Open & View Multiple Documents

Multiple documents can be opened and viewed at the same time. This is done by right-clicking on the document display and selecting ***Duplicate View***. This will create two document tabs, each of the same document. You can now select to view a different document in either of the document tabs.

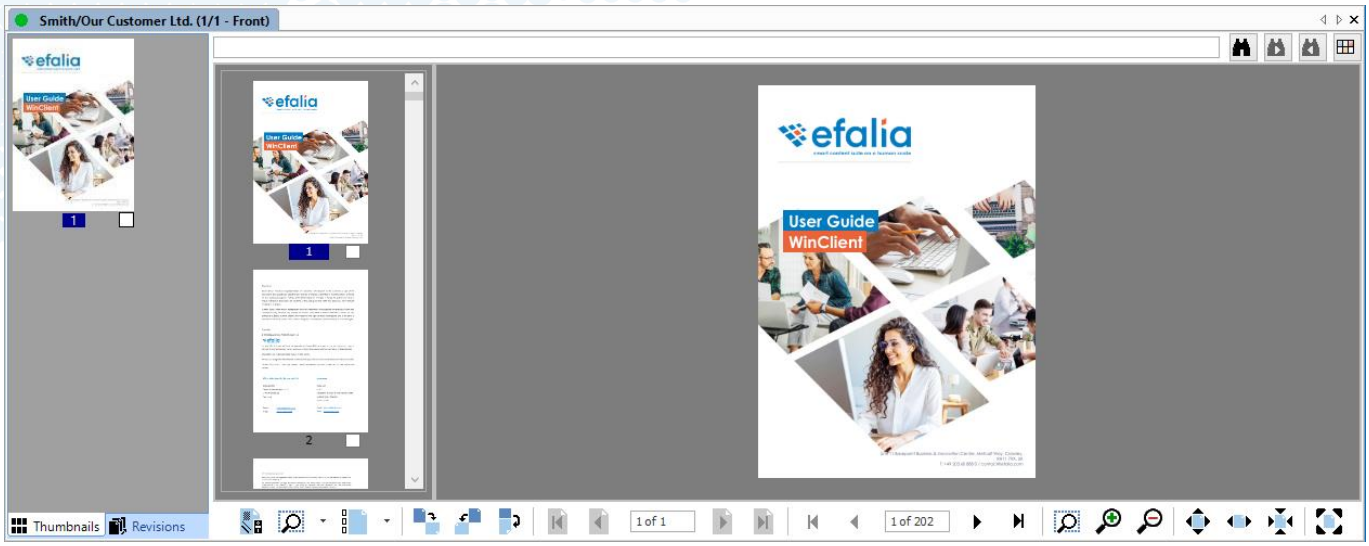
Both documents can be viewed simultaneously by right-clicking on one of the document tabs and selecting either ***New Horizontal Tab Group***, or ***New Vertical Tab Group***.

Page Display Tools

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

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

These options are displayed within the document viewer.



Display whole page in the image display window

The whole of the displayed page will be shown in the document display window. This is also available by right-clicking on the document display window.

Fit width of page to the document display window

The document display window will fit the width of the document to the size of the display window. This is also selectable by right-clicking on the document display window.

Display page in original size

Selecting this will 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. This is also selectable by right-clicking on the document display window.

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.

Zoom Slider



When using ***Style 3*** layout only, a Zoom Slider will be displayed in the bottom right corner of the WinClient. This allows you to zoom in and out of the displayed page by sliding the marker along the bar. Alongside the slider are the ***Display whole page*** and the ***Fit width*** tools.

Note

Using **Style 1** or **2**, the zoom slider must be added manually to the toolbar.

Display selected part of an image



You can display a part of an image by dragging a rectangular box around the relevant part using the left mouse button.

Rotate page 90° counter clockwise



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

Rotate page 90° counter clockwise



This 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 180°



This will rotate the displayed page 180° based on the current view. This is also selectable by right-clicking on the document display window.

Note

Pages of stored documents can be rotated temporarily without checking out the document. Users who are only allowed to retrieve documents and not edit can rotate a document.

A rotation is only stored and displayed during the next retrieval of the relevant document, if it is checked out, rotated and then checked in. This is the only way rotations are saved.

Maximize document viewing area



With this option the page can be displayed in full screen mode. The Cabinet Control panel and any document lists are hidden and the document display window will be maximised within the WinClient window. Selecting this option again will revert to the standard display. You can also use ***F12*** to toggle the display mode.

Check-In and Check-Out

New documents are stored locally on the workstation and shown in the local documents list. 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.

To edit a document which is stored in a Cabinet it has to be checked-out first. Only then it is possible to change the document. 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 with a status of ***New*** are stored locally on the workstation and are not stored in the Efalia ECM Cabinet. They are shown in the ***local documents*** list.

Documents with a status of ***Checked-Out*** are always displayed on the ***local documents*** list and also on the ***Search list***, depending on the search criteria used.

The documents may also appear in the ***Inbox*** if they were sent from another Efalia ECM user or via process management.

Select ***Check-In*** in order to check in the selected new or revised documents into the Efalia ECM Cabinet.

This can be done by the toolbar tool or by right-clicking on the selected document(s) and selecting ***Check-In***.

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:

Field must be filled completely, empty not allowed or valid date must be specified. If a document is not checked-in due to mandatory field settings, an appropriate hint about the incorrect index appears in the ***Upload Status*** field.

Protected fields

Protected fields cannot be changed. They are greyed out and inactive in the WinClient 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.

Cancel Check-in of documents

Multiple documents can be selected and checked in simultaneously. The status bar at the bottom of the WinClient window displays check-in status information. The left progress bar shows the progress over all documents to be checked in, with the right progress bar showing the progress of the current document. A ***Stop*** button is located between the progress bars which will stop the check in process.

Automatic Check-In Options

Documents can be checked in automatically. This can be specified for new documents or checked out documents.

The automatic check in can be set within *Start ⇨ Options ⇨ General* tab. The following affect the check in of documents:

Remove new documents after check in

A new document is stored on the ***local documents*** list of the user. When this option is set, the document is automatically removed from the list when the document is checked in. If this option is not set, the document remains on the list with a status of ***Archived***.

Remove revised documents after check in

Previously stored documents which have been checked out appear on the ***local documents*** list of the user. When this option is set, a document with a status of checked out is removed from the local list when it has been checked in again. If this option is not set, the document remains on the local list with a status of ***Archived***

Don't remove from search result list

A Search Results list is displayed when a user performs a search. If a document from this list is revised, it is checked out and then checked in again. This setting determines if a document is removed from the previous search list after check in or not.

Auto Check-in new documents

With this option set new documents are automatically checked in directly after scanning. When this option is used, the index information should be entered before scanning in order to check in the document with correct index criteria. If documents are automatically checked in without an index, a revision is automatically created when the index information is added (not in a document type specified as an Inbox).

Auto Check-in new documents after edit

If this option is set, new documents are not checked in immediately but will be after the index information has been edited.

Auto Check-in revised documents after edit

When documents are already stored on the Efalia ECM server, they can be automatically checked in to the server after they have been revised when this option is set.

Reminder to check in new documents on program exit

If new documents are not checked in, they cannot be retrieved on the server. If the user should check in new documents before exiting the WinClient then this option should be set. The user is then reminded to check in the new documents prior to the WinClient closing.

Reminder to check in documents on program exit

With this option set the user is reminded to check in documents which have been checked out when the WinClient is closed.

Note

Please note that the automatic functions always need a connection to the server. If the WinClient is used in Offline mode, no check in or check out can be performed.

Check out documents

Documents with a status of ***Archived*** can be checked out from an Efalia ECM Cabinet. If a document is checked out, a copy is displayed on the ***local documents*** list of the work station. During the time a document is checked out, it is displayed with a status of ***Read only*** for all other users. A different user can only check out this document after it has been checked in again.

Select ***Check out*** from the toolbar or click with right mouse button on the document list in order to check out the selected documents.

Undo Check out

With the option ***Undo Check out*** it is possible to change the status of a document from ***Checked out*** to ***Archived***. The document remains on the same version as it was before it was checked out. Changes which have been introduced during check out are not stored.

Select ***Undo Check-Out*** from the ***toolbar*** or the ***context menu of right mouse button,*** when selecting a document on the list, in order to reset the status for the selected documents.

This command can only be performed by an administrator or by the user who has previously checked out the document.

Important

In this case checking in of documents previously checked out is not possible. They have to be removed from the local list and checked out again if they need be changed.

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 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, are stored. If pages are appended they are stored as additional *.tif or *.jpg files.

When electronic documents (see EDocs) 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*** tab, which is shown when the thumbnails are displayed alongside the document. The tab appears in the thumbnail part of the display window. From the drop down list 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.

Change Revision/ Check out

Only the most recent revision can be checked out and changed. A warning is displayed if the user tries to check out an earlier revision. This also applies for electronic documents (EDocs).

Print Revisions

Select the relevant revision. In order to print single pages, select the pages to be printed in the thumbnail display and select the ***Print*** command either in the main menu or in the context menu of right mouse button.

To print the current page right-click on the document display and select ***Print***. What is being printed always depends on the current selection.

Document Type With Revisions Disabled

If a document type is configured with revisions disabled, it does not create revisions.

Document Editing

Existing documents can be edited in many ways, and can depend on whether it is a document stored in a Cabinet or a new document on a local documents list. Editing of documents will also depend upon the rights of the user.

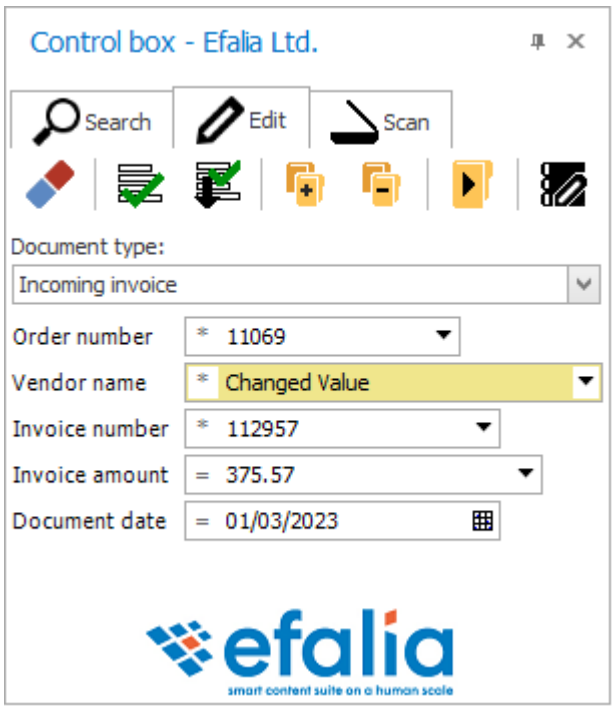
The Control Panel ***Scan*** options include tools for appending, prepending and inserting of pages into existing documents. Pages can also be edited by adding annotations to them.

Additionally, the index information associated with a document can be added and changed, whole documents or single pages of a document can be deleted, and documents can be combined or split.

Editing Document Index Data

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

The editing of index data is carried out using the ***Control Box***, which displays the index information for the current document. Only the index fields of the document type in which the document is stored are available for editing.



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

Select the document to be edited in the document list. If the document is already stored in Efalia ECM, it can be displayed after retrieving it.

Select the ***Edit*** tab in the Control Box. 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.

Click on the ***Save changes*** tool in order to carry out the changes.

Moving Document between Document Types

Select the document to be edited in the document list. If the document is already stored in Efalia ECM, it can be displayed after retrieving it.

To move a document to a different Document Type select the ***Edit*** tab in the Control Box. Select the new 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.

Click on the ***Save changes*** tool in order to carry out the changes.

Indexing Multiple Documents

Select the first document to be indexed from a document list. If the documents are already stored in Efalia ECM a search operation needs to be performed first to list them.

Select the ***Edit*** tab in the control box.

Enter new index information or change existing information in that document type.

Click the ***Save Changes and Move to Next Document*** tool. This will automatically move to the next document on the list.

During editing the index data can be preserved when moving to the next document. This is achieved by a setting within the WinClient app.xml.

```
<add key="PreserveFieldsOnEdit" value="true" />
```

Note

If this setting is only applied to the local WinClient app.xml, the next time the WinClient is updated, the setting will be lost. To set this permanently, the change must be made to the app.xml held on the Efalia ECM server. This can only be set by a server administrator.

Changing Index Data for Multiple documents

The index data applied to multiple documents can be changed simultaneously by selecting the documents within the Document list, selecting the ***Edit*** tab in the Control Box and then editing the index data. When the ***Save changes*** tool is selected. All the selected documents will have their index data changed.

Only those fields that had their data changed will be saved for the selected documents. All other fields will retain their original data. When a field has been edited, the index data will be highlighted in yellow.

Indexing Using the Keyboard Only

Documents can be indexed using only the keyboard, moving from one index field to the next by hitting the ***Return*** key. When this is done in the last field, the focus jumps to the tool ***Save changes and go to next document***. Hitting Return again will save the changes made, and move to the next document in the list.

Note

Using ***Alt*** ⇩ keyword lists, date fields and previously used index can be displayed in a drop down list and used for fast manual indexing.

Copy and move using drag & drop

Pages within a document can be moved and copied, or moved and copied to another document

Move pages within document

To move pages within a document, select the pages in the thumbnail view and by holding the left mouse button down, move to the target position.

A blue line shows the target point where the page or pages will be moved.

Move pages from one document to another

If pages are to be moved from the current document to another document, select the pages in the thumbnail view and move them to the target document in the search list.

The pages are attached to the target document and can then be moved to the final position in the document.

Copy a document to another document

A whole document can be copied by selecting it on the document list and dragging it using the left mouse button onto another document.

The original stored document remains and if required can be deleted.

Copying selected pages

When pressing the CTRL-Key while scrolling, the pages can be scrolled and then copied. Pages can be copied inside a document and also from one document to another.

Creating a link to a document in a Windows-folder

Moving documents using drag & drop from a windows directory to a page, a link to documents path is created.

Note

Please keep in mind that the link remains on the page even if the file does not exist in the specified path. This may apply to another user who accesses the document, but does not have rights to the location of the linked document.

Indexing using OCR Forms

Predefined forms with OCR and/or barcode zones can be configured using Enterprise Manager, and then applied to documents within the WinClient, so as to automatically fill index fields with data read from the documents.

Usually the OCR is associated with a scan profile, which will perform the OCR recognition during the scanning process.

If the OCR needs to be performed on documents already stored in Efalia ECM, it is possible to run the OCR recognition by selecting the documents in the WinClient and starting the OCR recognition by selecting ***Edit*** ⇨ ***OCR Document***.

Use a Scan Profile Configuration

With this option the settings are used which have been configured in the scan profile the document was scanned with.

Full form recognition

With this setting all forms are checked for an identifier configured in Enterprise Manager and the documents are identified, sorted and indexed to the target document types.

Document Type limited form recognition

If there are several documents defined for one document type, only these forms will be used for recognition. If the documents are sorted before scanning, you will have faster recognition.

No form recognition - Always use this form

When this option is selected a specific form can be chosen from a drop-down menu, which is used for the recognition.

At this, the identifier of the chosen OCR form is not being used for batch separating.

Note

If the selected form was created Efalia ECM Enterprise Manager with identifiers, these characteristics also had to be identified, correctly, when using ***No form recognition – Always use this form***, that the corresponding index fields are filled with the OCR-read values.

Combine documents

Using ***Combine documents*** in the ***Edit*** tab of the Control box, several documents can be combined to a single new document. It is also possible to append one or more documents to a specified document. This is dependent on the status of the documents to be combined.

Combining Archived Documents

Select the documents to be combined. The selected documents are appended to the document selected last.

When documents with a status of ***Archived*** are combined, the appended original documents are not deleted. If these documents should be deleted this must be carried out as an extra action.

Combining New Documents

When documents with a status of ***New*** are combined, the appended documents can be deleted as they have yet to be stored to the server.

Combining New and Archived documents

When documents with a status of ***New*** and ***Archived*** are to be combined, the archived document must be retrieved and checked out first. After check out they are stored in the local documents list. The documents to be combined can then be selected. They are appended to the document selected last. If the appended document has a status of ***New***, it is deleted from the local list. If the archived document is appended to the new document, the archived document stays on the server. After the documents have been combined they must be checked in again.

Splitting Documents

Split documents, available in the ***Edit*** tab of the Control box, allows a document to be split into two parts. In the thumbnail display the split position can be specified, the splitting is done from the selected page. All pages which follow the currently displayed page form a new document with identical index information.

If the document being split has a status of ***Archived*** the status is changed to ***Checked-out*** and the part of the document removed is listed as a new document in the local document list.

Add Files

File can be added to an existing document by highlighting document in the Document List and selecting ***Add files*** from the right-click menu. A file selection window opens from which the files to be added can be chosen. The files will be appended to the document

Scan Profile Post-indexing

Documents are scanned in with the batch scan option via a scan profile configured for post-indexing.

The documents are scanned in as a batch without index data and are provided by the server through the post indexing to the users named in the scan profile.

As soon as a user who is designated for post-indexing clicks on the ***Post Indexing*** tool, the server provides a batch for indexing. It appears in the ***Local documents*** list of the user as a checked-out document with several pages.

The user can start then post-indexing.

The user chooses the appropriate document type and completes the index fields. Once the last filled index field is confirmed with ***Return***, the WinClient highlights the tool ***Save changes***.

The first page of the batch appears on the Local documents list and is marked as a new document.

If the following page of the batch belongs to the document just created, it can be added to the previous document using the shortcut ***CTRL +***.

If one or more pages have been added to a previous document by accident they can be transferred back to the batch through the shortcut ***CTRL -***

Once the document has been indexed, it can be checked-in.

Duplicating a document

To duplicate a document, select it in the document list and right-click. Select ***Duplicate Document***. When a document is duplicated it appears in the local documents list with the same index data as the original document, but with the status set to ***New***. The index data can be changed before checking in the duplicated document.

Please note that a duplicated document is totally separate to the original document.

Create Linked Document

Selecting this option will create a new document with the same index information as the currently selected record on the Search Results list. The new document will be linked to the existing document that it was created from. When viewing the new document subsequently, the source document can be retrieved by selecting Follow Document Link from the image display right-click option.

The new document, after being created, can have pages added to it.

Follow Document Link

When a document has been created from an existing document using the *Create Linked Document* option, the source document can be retrieved by selecting this option

Unlink Document

The link between documents can be removed by selecting this option.

Convert a document

Using this option a scanned page can be automatically converted to an editable Word-document. The page will be scanned via OCR and saved as a .doc file. The OCR engine must be installed on the client to use this function and a client OCR licence is required.

Note

As the conversion is done by the OCR text recognition, it might be necessary to edit the text depending on the quality of the source document.

Create an Empty Document



Select ***New document*** from the ***Edit*** or ***Scan*** tools in the ***Control Box*** in order to create an empty document. The document is created in the local documents list of the selected document type. This function allows empty documents to be created as containers for later scanning.

Delete Documents and Pages

Documents can be removed from a document list or the document itself is deleted. This depends on the status of the document and the document list it is in.

Delete single pages of a document

Display the document and select the page in the display window. In thumbnail view you can also select several pages. The page can be deleted via the main menu or the right-clicking and selecting ***Delete***.

Recovering a deleted page

If a page has been deleted from a stored document and not checked in again, the version prior to the deletion can be restored by clicking ***Undo Check out***. If the document has already been checked in again, the page is present in the previous revision.

A page deleted from a new document must be rescanned.

Remove documents from a document list

Local documents

The local documents list contains new or downloaded documents. These can be removed at any time without affecting the server documents.

Documents with a status of ***Checked out*** must be checked in again before they can be removed from the local document list. If documents remain on the local list after they have been checked-in will be determined by the automatic options set. During check in, if a document with a status of ***checked out*** cannot be checked in, check the status of the document on the server. If it is shown as ***checked-in*** it can be removed from the local list.

Inbox

Documents in the Inbox can be removed without deleting the relevant server document. If a document is stored in the Inbox by a process, it can only be removed once the process is complete.

Delete documents from server

If a document with a status of ***Archived*** is deleted from the ***Search*** list, the server document is marked as deleted, and will not be returned in any searches. Documents with a status of ***Read only*** will disappear from the list, but they will appear again after a new search operation is performed which matches the documents.

Select the documents to be deleted and click on ***Delete*** on the ***Edit*** toolbar or right-click on one of the selected documents and select ***Delete***.

Undelete Documents

If a document has been deleted in the WinClient, a flag is set in the database, marking the document as deleted. Using ***Info Search*** a deleted document can be shown and displayed again.

If the document needs to be undeleted, select the document in the list, right-click and select ***Undelete Document***.

Delete Private Emails

Within a Document Type that has been configured to store emails, you can permanently delete private emails. This is not dependent upon having ***Delete*** rights within the Document Type.

With one or more email documents selected, right-click on one of them and select ***This is private email***. You will be asked to confirm that the emails are private, and that you wish to delete them. If you confirm this, the emails will be permanently deleted from the server.

Automatic Indexing (Forms Recognition)

Using text recognition, index fields can be automatically filled by reading zones on the page. The forms recognition must be configured by an Efalia ECM administrator. If the pages to be scanned always contain the same structure, a form with defined reading zones can be used by the system.

The following are required for zone recognition:

- OCR Licence
- Installed Component Services and OCR Engine on the client
- Stored forms with zone definitions
- One scan profile with OCR recognition activated
- Documents to be scanned with sufficient quality

If OCR recognition is configured on the workstation, the user can perform OCR recognition by clicking ***OCR Document*** on the ***Edit*** menu

Codeless Connector

Index information can be taken from external applications with the use of the Codeless Connector. With a configurable keyboard shortcut the field content of the external application can be automatically transferred to the index fields linked in Efalia ECM. The connection of the fields and the shortcuts are configured in Enterprise Manager.

Note

The Codeless Connector can also be used with JAVA applications. For each work station using the Codeless Connector a licence is required.

Document Security

When a user has full control on a document, that user can access and specify security settings on the document. If for example a different user needs to edit a document which is normally not accessible to that user, they can be granted explicit rights to that document, by the user with full control.

If a user should be denied access to a specific document they would normally have rights to, a user with full control can deny view rights.

To specify the rights on a document, select the document in the list and choose ***Security*** from the ***Edit*** toolbar.

A window for the specification of rights appears. Click ***Add*** and add the user or group for which you want to give certain access rights. The following rights can be granted or denied.

Full access

This enables the user given full control to grant rights to other users.

Create

If Create is allowed for a user, that user may create documents and check them in to the server. This setting is only applicable for new documents. Appending, or changing existing documents is not affected by this setting.

Delete

When Delete is allowed, the user can delete stored documents from the server. This setting is not applicable for new documents yet to be stored to the server.

Modify

With this right allowed, index data may be changed, pages may be appended and annotations may be set.

Display

When Display is allowed, the user can view the document.

Download

With Download allowed, a user can search for and view the document pages.

Note

The management of the local cache and login to the workstation is important when using this option. If standard authentication is used, it may lead to a lack of security, when two users with different rights work on one work station.

Download Revisions

With this right allowed, the user can view all revisions associated with the document. When denied, the user may only download the latest revision of the document.

Change annotations

When annotations are set on a page, the user cannot change them unless they have the rights to do so. With annotations, certain parts of a page can, for example, be hidden.

Retention control



The button ***Commit phase***, in the tab ***Edit*** of the ***Ribbon toolbar*** and the context menu of the right mouse button, confirms a retention control phase, which has been set-up as ***External***.

Annotations

Annotations can be added to *.TIF, *.JPG or *.PDF pages of a document. Annotations can appear as highlighted areas displayed in colour, lines, arrows, hyperlinks etc. These annotations do not change the original document and are displayed as an overlay of the original image.

When annotations are added to, or removed from 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.

If a page has an annotation a ***Plus*** symbol appears at the left corner in the thumbnail view.

Display/Hide annotations

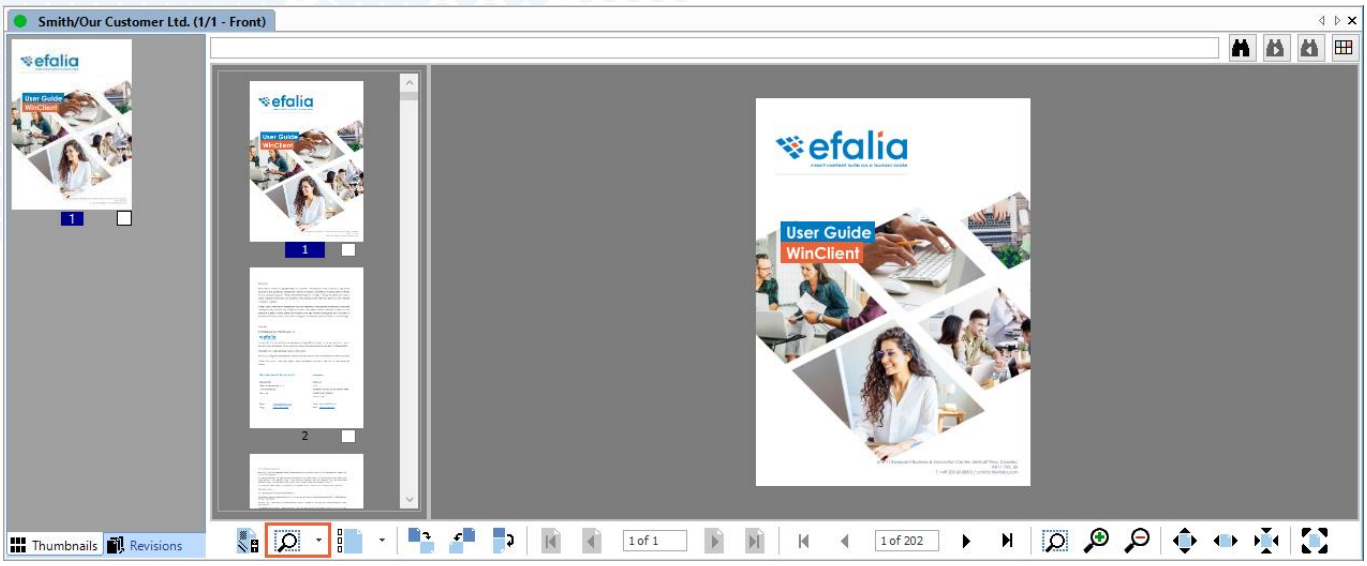
Select the ***Hide/Show annotation*** tool to toggle the display of annotations on or off. Annotations can only be hidden or displayed by a user who is allowed to change annotations.

Select annotation type

In order to add an annotation to a page of a document it must first be displayed. The page must be stored in ****.TIF***, ****.JPG*** or ****.PDF*** format.

The annotation type to be added to the page can be selected from two locations:

Select the relevant annotation type from the list of ***Annotations***, provided in the document viewer area. The default icon for this is the area zoom tool. This will change according to the annotation type selected. Alternatively, right-click on the page in the display window, highlight ***Annotations*** and then select the annotation type required.



Black area

Select ***Black area*** and draw a rectangular area on the displayed page. It is filled with black, and the part of the page behind the rectangle will be blacked-out.

You can change the colour within the rectangle by double clicking on the box, select ***Choose colour***, and select the colour needed.

White area

Select ***White area*** and draw a rectangular area on the displayed page. It will be filled with white, and the part of the page behind the rectangle will appear blank.

You can change the colour within the rectangle by double clicking on the box, select ***Choose colour***, and select the colour needed.

Text

Select ***Text*** in order to add a text annotation to a page. A text annotation has no background colour. Draw a rectangle on the displayed page, and when you release the left mouse button, the properties of the annotation are displayed in a window. Enter the text, and select the font and colour. After clicking ***OK*** the text annotation is displayed on the page.

The annotation text is recognized when full text reading is configured. A document can be found by typing text from a text annotation into the full text search.

Line



Select ***Line*** to draw a line on a page. While holding down the left mouse button, move the mouse to draw the line, and release the left button to complete the line.

The colour of a line can be changed by double clicking it. Select ***Choose colour***, then select the colour and click ***OK***.

Arrow



Select ***Arrow*** in order to draw an arrow on the page. While holding down the left mouse button, move the mouse to draw the line, and release the left button to complete the line.

The colour of an arrow can be changed by double clicking on it. Select ***Choose colour***, then select the colour and click ***OK***.

Highlight



Select ***Highlight*** and draw a rectangular area on the displayed page. This will emphasize a part of the image without hiding the content. This annotation works like a text marker used on paper.

The colour of the highlighted area can be changed by double clicking on it. Select ***Choose colour***, then select the colour and click ***OK***.

Sticky Note



Select ***Note*** to add a note to the page. The note has a yellow background.

When this tool is selected, keep left mouse button pressed at the position where the note should start. Drag the mouse to the position where the note should end and release the mouse button. The annotation properties are displayed in a window. Enter the text and select the font properties. After clicking ***OK*** the note is displayed on the page.

Mini Sticky Note



Select ***Mini sticky note*** to add a mini note to the document or page.

A popup window will open, allowing you to enter the note text.

The mini sticky note will show a note icon on the page or the document. By clicking on the icon the note will be opened, and the note can be read, and edited if required.

On images, such as scanned or imported TIFF or JPG images, multiple mini notes can be applied to a page, and positioned as required. On electronic format documents such as MS Word documents, only one mini sticky note can be added, and the note icon will be displayed in the top left corner of the display window.

Hyperlink



Select ***Hyperlink***, in order to create a link to a URL on a page.

When this annotation type is selected, drag a box in the area where you want to place the hyperlink. Once the mouse button is released, a window is displayed where the properties of the hyperlink are specified.

Enter a description for the hyperlink for display on the page. Select a font and colour for the text.

The hyperlink can be a link to a URL, for example an external website. Enter the web address in the field ***URL***.

Signature



To place a signature on a document an image must be defined first. To do this, select *Start ⇨ Options ⇨ Signature ⇨ Choose your signature image*. You can define up to three different signatures for one person. To place the signature a password must be entered, the same password must be configured for all three signatures. The image of the signature will be embedded in the tiff file of the document page and cannot be deleted.

Ad-hoc Signature



Adding an ad-hoc signature to a document requires the use of a supported signature pad, which is used to generate the signature. The image of the signature will be embedded in the tiff file of the document page and cannot be deleted.

Stamp



Select ***Stamp***, in order to add a stamp to a page. Follow the selection arrow to the right and select the relevant stamp. Stamps can also be applied to a page by using the hotkey combination defined for the stamp in Enterprise Manager.

When this tool is selected the mouse cursor switches to a crosshair symbol with the selected stamp in the background. Move the stamp to the required position on the page and drop it with a click of the left mouse button.

Note

- Stamps are only available when they have been configured in Enterprise Manager by an administrator user.
- Stamps (for example with colour areas) are always translucent.
- Stamps can be predefined in a scan profile to automatically put them on the first page or on all pages of the document.
- For embedding of stamps on a page, for example when the page is to be downloaded or sent via email, it is saved in JPEG format.

OCR Index



With OCR Index it is possible to draw a zone on a displayed page and directly move the recognized information to an index field independently of any forms recognition that may be configured. This function can also be used for scanned pages which are not suited for automatic OCR indexing.

The functionality of OCR Index can be changed and set for each client in the respective app.xml of Efalia ECM WinClient.

By default, another use of OCR Index in the same field replaces the previously read and inserted value.

For more information see Annotation: OCR Index.

Perform OCR zone recognition

To draw and OCR a zone on a displayed page, and place the text in an index field, follow the steps below

1. Select the document to be indexed and display it.
2. Select the Edit tab in the Control Box
3. Select the index field to be filled
4. Select ***OCR Index*** from the list of annotations.
5. Drag a zone around the information to be read.

Note

An OCR Server licence is required for this option. With this, it can be used by all WinClients that are connected to the server without installing the OCR engine on each workstation.

Hyperlink to another document

Open the document to which the annotation is to be placed. Search for the document to which the link to be added should point. Now you can pull the document by drag and drop on to the displayed page. A link is created which is assembled from the index information of the document to be linked.

Several documents can be selected and pulled simultaneously as links to the document. The links are created one under the other on the page.

When viewing a link, an additional tab will be shown to display the linked documents.

Note

To delete a hyperlink, left click on the hyperlink in order to select it. When it is displayed in red, it is selected and can be deleted.

Move annotations

To move an annotation, select it by clicking and holding down the left mouse button. Drag it to the new position and release the mouse button to drop the annotation at the new position.

Delete annotation

To delete an annotation, select the relevant annotation and select ***Delete*** from the toolbar or use the context menu of the right mouse button.

Printing & Saving to File

Documents and document lists can be printed and exported from Efalia ECM in a number of ways.

Printing

The printing options allow the printing of single or selected documents and printing of single and selected pages of a document.

You can print TIFF and JPEG formats with the WinClient alone. If ***Component Services*** is installed, more than 200 different formats, including Microsoft Office formats and Adobe PDF files can be printed.

Print a Single Document

To print a single document, right-click on the document you want to print in the document list, and then select ***Print*** from the context menu.

Print Multiple Documents - from...to

To print several documents which are listed one after the other on the document list, click on the first document of that range. Hold the ***SHIFT*** key and click on the last document of that range in order to select them.

Right-click on the highlighted documents and select ***Print*** from the context menu.

Print selected documents

In order to print selected documents from a list, click on the first document to be selected press the ***CTRL*** key and select more documents to be printed.

Right-click on one of the highlighted documents and select ***Print*** from the context menu.

Print one page of a document

Open the relevant document and display the page to be printed. Right-click on the page and select ***Print*** from the context menu.

Print several pages of a document

You can select several pages of a document in thumbnail display for printing. Open the relevant document; display the pages either in ***Thumbnail view and image*** or ***Thumbnail View*** only.

Click on the check boxes below each thumbnail for the pages to be printed. Alternatively, hold the ***CTRL*** key down and click on the pages to be printed in thumbnail view. Right-click on one of the selected thumbnails and select ***Print*** from the context menu.

Copy / Print Area

With this option an area of the page being viewed can be selected. Once selected, the user can choose from four options:

Choose whether to send the selected area to the printer, to send it at exact scale to the printer or to copy it to the clipboard. From the clipboard it can be pasted within another application, within an email for example.

The Clipboard (Text) option OCR's the area and the recognized text is saved into the clipboard. The text can be pasted into other applications.

Note

An OCR Server licence is required for this option. With this, it can be used by all WinClients that are connected to the server without installing the OCR engine on each workstation

Display Text

When viewing a document that has been full text OCR'd, the text of the document can be copied to the Windows clipboard. Selecting the ***Display text*** tool on the ***Edit*** toolbar will open a popup window containing the text read from the document.

Select ***Clipboard*** to copy the text to the clipboard. If the document being viewed is an electronic format document, such as a PDF or an MS Word document, the complete document text is available. For TIF or JPG scanned or imported documents, only the text from the currently displayed page will be available.

Print document lists

To print a list of the selected documents, choose ***Print Document list*** from the right-click options.

Note

When a search on the Efalia ECM server is performed, a maximum number of documents to be displayed on a document list is specified. This maximum value is by **default set to 1000**. If more than 1000 documents need be listed in the WinClient this value can be amended on the server by an administrator.

Saving to File

Save Document

Select the document to be saved in the search results list; right-click and select ***Save as...*** The pages of the document are saved in the location specified during this process.

Assign file name automatically

The content of an index field can be chosen as the file name. To do this, the mouse cursor must be positioned on the index field to be used for file naming. Rich-click on the document and choose ***Save as…***If the mouse cursor is not over an index field, the original TIFF file name is selected for saving.

Save one page

Right-click and select ***Save as…*** in the display window, only the displayed page is saved, using the original TIFF file name.

Save a selection of pages

Change to the thumbnail view in the display window and select the pages to be stored. Right-click and select ***Save as…***

Save in different formats with/without OCR text

Documents can be saved via the ***Save as…*** option in different formats. If you want to convert a scanned page into an editable text, you have to install the OCR engine on the local client. For this an OCR client licence is required. During the storage process the OCR recognition will automatically be done when using appropriate formats.

The following formats can be used for saving:

PDF (*.pdf),
PDF with Text (*.pdf)
Word 2000, XP (*.doc)
Word 97 (*.doc)
Excel 2000, XP, 2003 (*.xls)
Excel 97 (*.xls)
Text (*.txt)
Text with line breaks (*.txt)
Unicode Text (*.txt)
Unicode Text with line breaks (*.txt)

Export Document List

The index information from all or selected documents can be exported to file from any of the Document Lists. Select the documents for which the index information is to be exported and then select ***Export Document List*** from the ***Start*** toolbar. A file name can then be selected, and the information can be saved in one of the following formats:

XML File (*.xml)

HTML File (*.html)

Text File (*.txt)

Excel Sheet (*.xls)

Scanning Documents

The WinClient allows the storage of pages to new documents or the appending and prepending to existing documents in several ways. Many scanners are supported without the need for additional driver installation. Depending on the scanner, black and white, greyscale and colour documents can be created.

Supported scanners

The support of a scanner depends on the available drivers. Many Canon, Epson, Panasonic, Plustek and Samsung drivers are integrated into Efalia ECM. Other scanners can be used via TWAIN or high-speed device drivers, delivered from the manufacturer with the scanner. High-speed support is an option, and a licence is required for the WinClient to support high-speed device drivers.

The WinClient supports many Canon 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 Enterprise Manager, which can be then used within the WinClient. 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

Users require Scan rights to be able to access scan profiles for scanning documents. Additionally, scan profiles themselves can have rights applied to them, so not all scan profiles may be available to a user with Scan rights.

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. In a scan profile a fixed document type can be assigned, and fields can be automatically filled with pre-set values.

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.

A scan profile can also be configured to be linked to one fixed document type or the document type can be changed manually by the user.

Note

If you cannot see the Scan tab, you may not have the right to scan.

Change scanner settings

The scanner settings can be temporarily changed in the WinClient. 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.

Set automatic value

When documents are scanned, an index field can be pre-set with a fixed value automatically. If multiple pages are scanned, each new document is pre-set with the relevant value.

When the scanner type is set to ***Directory Scan***, index fields can be set to parts of the file path, filename, extension, or the creation, modification or last accessed date and time.

For files which have the index data as the filename, the name can be split and imported. The precondition is to have field separators in the filename between the index data.

Example

In the import path are tiff files with the following names:

0001_Smith.tif

0002_Brown.tif

The underscore should be configured as the ***Additional path and filename separator***. The ***To value:*** field should be set to ***Part of filename***.

Value 1 is mapped to the field, which will be filled with the content 0001, e.g. customer number. Value 2 is mapped to the name field. The ***Index*** setting controls which part of the filename is used for each field.

When ***Part of path*** or ***Part of path and filename*** is used, the path will be taken into consideration. Each drive letter/storage location, folder and subfolder within the path is counted as a Value setting.

When ***Numbered index (&I1….&I2…)*** setting is selected, the &Ix is used as the field separator.

Note

When using this setting, ensure that the pre-set fields are used in the relevant document type where scanning is carried out. It is recommended to either use a fixed document type or not to select **Allow to change manually**, or choose index fields which are used in all document types that are used for scanning.

Use OCR-/Forms recognition

This option can be switched on if OCR forms are created and configured within the scan profile. When documents are scanned and OCR recognition is used, the Component service and OCR engine must be installed on the workstation.

Note

It is important for the OCR recognition, that index fields can only be recognized properly if documents are scanned with the same resolution than the stored sample page on which the form was designed on. The resolution in a scan profile using forms recognition should be predefined and not changed by the user.

Document Type Selection

The scan profile can be configured to be used with a single Document Type, or any Document Type that a user has access to.

Local Scan Profiles

When a workstation has a scanner attached to it, the WinClient 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 ***Scan*** tab in the Control Box, the WinClient will create a list of the pre-defined scan profiles available to the user. If none exist, the WinClient 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.

Unlike the pre-defined scan profiles, which can be linked to forms recognition, and can have default field values assigned to them, the only settings available with the temporary scan profiles are settings that the scanner offers, such as resolution, colour settings, and single or double-sided scanning. For certain scanners, an ***Extended*** tab may be shown within the scanner setup, which has settings that are unique to the scanner attached, such as double-feed detection settings.

The WinClient 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.

Scan Multipage documents



Using ***Batch Scan*** all pages in the feeder of a scanner are scanned and stored as one document in Efalia ECM. Exceptions to this can be that a set number of pages per document has been defined within the Scan Profile, and by using batch separation, defined within the OCR forms using Enterprise Manager.

To scan a multipage document:

1. Select the Scan tab in the control box of the Cabinet.
2. Select the relevant scan profile.
3. Select a document type where the document is to be stored. When the scan profile does not allow the settings to be changed, the document type is selected automatically.
4. Index information can be entered into the index fields before scanning. The scanned documents can also be indexed afterwards.
5. Select Batch Scan

If the contents of the index fields currently displayed need to be cleared prior to the start of scanning select the ***Clear fields*** tool. A scan profile can also be designed to perform an automatic OCR/forms recognition on the document. In this case, indexing is performed automatically when forms recognition and the client are configured for this task.

Scan Single Page Documents



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

In order to scan a single page:

1. Select ***Scan*** in the control box of the Cabinet.
2. Select the relevant ***Scan profile***.
3. Select a document type where the document can be stored. When the scan profile does not allow the settings to be changed, the document type is selected automatically.
4. Index information can be entered into the index fields before scanning. The scanned documents can also be indexed afterwards
5. Select Single Page scan

Select ***Clear fields*** in the ***Scan*** toolbar, if you want to clear the content of the index fields currently displayed.

A scan profile can be designed to perform an automatic OCR/forms recognition on the whole document. In this case, indexing is performed automatically when forms recognition and the client are configured for this task.

Append pages



Pages can be appended to any document in Efalia ECM apart from documents which have a status of ***Read only***. These documents are currently checked out for editing by another user.

If the document to which pages are to be appended has a status of ***Archived*** it will have the status of ***Checked out*** after scanning. The document is then displayed in the local document list. The scanned pages are appended to the end of the document.

To append pages to a document:

1. Select ***Scan*** in the control box of the Cabinet
2. Select the relevant ***Scan profile***.
3. Select the document to which pages should be appended.
4. Select Append Pages.

Insert pages



Pages can be inserted into any document in Efalia ECM apart from documents which have a status of ***Read only***. These documents are currently checked out for editing by another user.

To insert pages into a document:

1. Select the ***Scan*** tab in the control box of the Cabinet
2. Select the relevant ***Scan profile***
3. Select the document into which you want to insert and open it.
4. Select the page for inserting. The new pages will be inserted before the page selected.
5. Select Insert Pages

Prepend Pages



Pages can be prepended to any document in Efalia ECM apart from documents which have a status of ***Read only***. These documents are currently checked out for editing by another user.

To prepend pages into a document:

1. Select the ***Scan*** tab in the control box of the Cabinet
2. Select the relevant ***Scan profile***
3. Select the document into which you want to insert to.
4. Select Prepend Pages

The pages scanned will be added at the beginning of the document.

Replace one page



Single pages within a document can be replaced.

To replace single pages in a document:

1. Select the ***Scan*** tab in the control box of the Cabinet
2. Select the relevant ***Scan profile***
3. Select the document into which you want to replace a page and open it
4. Select the page that you want to replace.
5. Select Replace one page

Replace all pages



All pages within a document can be replaced.

To replace all the pages in a document:

1. Select the ***Scan*** tab in the control box of the Cabinet
2. Select the relevant ***Scan profile***
3. Select the document you want to replace all pages for
4. Select Replace all pages

Stop scanning



Scanning can be stopped at any time by selecting the ***Stop Scanning*** tool on the ***Scan*** toolbar

All new documents are created and stored in the local documents list. In this list the document and its index can be edited if required. After checking in to the server, the documents can be retrieved by other users.

WinClient Start-up Options

When the WinClient is installed on a workstation a desktop shortcut is created for it. A menu is also created. This will start the WinClient using default settings. Additional shortcuts can be created, adding parameters to the startup command.

/Scanstation

It may be that within an office, only one workstation has a scanner which is used by several users to perform their scanning. All the users may have been allocated a standard user licence, which does not have rights for scanning. Adding the ***/Scanstation*** switch to the WinClient startup command, when a user logs in they will automatically be assigned a scan licence.

Create a shortcut for the WinClient and add the option to the end of the startup command:

> ***"C:\Program Files\Efalia GmbH\Efalia ECM WinClient\ DSDMS.FileDirector.WinClient.exe" /Scanstation***

/Skipbarcodepage

This option will use any page with a barcode on it as a batch separator, but will not save the page.

Create a shortcut for the WinClient and add the option to the end of the start-up command:

> ***"C:\Program Files\Efalia GmbH\Efalia ECM WinClient\ DSDMS.FileDirector.WinClient.exe" /skipbarcodepage***

Import Documents

Using the WinClient, documents and their associated index data can be imported. The index data for the documents is read from a text file.

Source Text File

The source import file is a text file that will contain the index data for a document and the name or names of the document files associated with that index data. Each documents index data and filename information is held on one line of the import text file. If the document files are held in a different location to the import text file, then the path for each document file must be specified in the import file.

When a text file is created, it must have field separators to allow Efalia ECM to determine the index data, which is any valid character not used within any of the index data of document names. Each line must contain the same number of fields, irrespective of whether a there is index data for that field.

123456,Bob Smith,image1.tif

234567,Tim Brown,image2.tif,image3.tif

345678,,C:\Import\Documents\image4.tif

In the example above, there are two fields, followed by the document filenames. Within each line, the index and filename information is separated by a comma, although this can be any valid character not used in any of the index data or filename. Record 1 has one document associated with it, whereas record 2 has two documents associated with it, again separated by a comma.

Record 3 only has one piece of index data, but still retains the comma to signify the end of the index data field. The document file is not located in the same location as the import text file, and therefore the full path to the document is specified.

Import Settings

To import the documents and index data select ***Import*** from the ***File*** menu and the import window is displayed.

Source File

Browse to the location of the import text file.

Field Separator

Specify the character being used to separate the index data and document filenames within the import text file.

Number of Fields

Specify the number of index data fields contained within the import file.

Left/Right Trim Chars

On occasions when the import file has been generated by a third party system, additional characters may have been added to the start and/or end of each index field, which should not be imported into the Efalia ECM index fields.

*^123456^,^Bob Smith^,^image1.tif^*

*^234567^,^Tim Brown^,^image2.tif^,^image3.tif^*

Using the Left Trim and Right Trim, you can specify the number of characters to be removed, and therefore not imported, from the start and/or end of each index field. In the example above, to remove the ^ character, set Left & Right Trim to 1.

Ignore Line Starting With

If the Import text file contains lines that should not be imported, such as comment lines, you can specify the character the lines begin with, and the import will ignore any lines starting with the specified character.

Full Line is Filename

This option should be selected when the document file name contains the full index data, and is the only content of the import file.

123456_Bob Smith_image1.tif

234567_Tim Brown_image2.jpg

Using the example above, for each record there are two pieces of index data, separated by an underscore. The document filename is the complete line, including the index data.

Import from All Directories

If there are directories below the one selected that also contain import text files with the same name as the one selected, this option will also process those text files as well.

Bundle All Pages

With this option, all records in the import file with the same index data will be combined into one record within Efalia ECM.

123456_Bob Smith_image1.tif

123456_Bob Smith_image2.tif

234567_Tim Brown_image2.jpg

In the example above, the first two records will be combined into one record in Efalia ECM.

Document Type

You can select the Document Type that the index data and documents are to be added to.

Source Index – Target Field

After the number of index fields the import file contains has been specified, the Source Index column will list those fields, numbered 0,1,2 etc. The source index fields can then be associated with the fields of the Document Type that has been selected.

Test Import

You can test the validity of the settings by using ***Test Import***. This will produce a *.testresult text file in the source location that will list any issues encountered, if any. This ensures that any issues can be corrected prior to importing the data and documents.

Test import only checks the import structure, not the complete document data to be imported.

Start Import

Once the import has been configured and tested, select ***Start Import*** to process the text file, and import the index data and documents.

The imported documents are created in the local documents list and will need to be checked in.

When the import has completed, a message appears stating whether the import process was successful or not. If the import procedure was not successful, but has been executed, the index data may point to non-existing documents. Should this occur, check that the images are all located in the same path as the index file.

Electronic Documents

Component Service, when installed on a workstation, allows the WinClient to interact with over 200 different electronic format documents (EDocs) such as Microsoft Word and Excel files, AutoCAD drawings and PDF files. The WinClient will be able to display and print the documents. A ***Send to Efalia ECM*** option will also be added to Windows Explorer to allow documents to be saved to Efalia ECM.

In addition, when Component Service is installed, if the option ***OfficeLink*** is selected, ***Save to Efalia ECM*** will be added to Microsoft Office applications.

How EDocs are stored

Each electronic document, other than imported .TIFF and .JPG files are saved as a page of an Efalia ECM document, even if the file itself contains several pages. To view the pages, Component Service must be installed.

How EDocs are displayed

The Component Service contains viewer filters which allow the display of different file formats without the relevant application being installed on the workstation.

The viewer supports more than 200 different file formats including the most popular propriety formats. Examples of these formats are Microsoft Word, Excel and PowerPoint files, Microsoft MSG Email files, Adobe Acrobat PDF files and AutoCAD drawings.

These formats can only be edited when the source application is installed

The viewer can display and print the electronic documents. It cannot recognize and display each and every format detail or special settings of the original file. Therefore the display of electronic documents in Efalia ECM can be different to the display of that document in the original application.

Note

Microsoft Office 97 format documents are no longer supported.

Navigating through an EDoc

The document navigation and display tools available will be dependent upon the document being viewed. With the vast majority of documents, you can use the vertical and horizontal scroll bars of the document display window to navigate through the document. At the bottom of the vertical scroll bar, ***Next Page*** and ***Previous Page*** tools will be available. For some documents, these will be available to the left of the horizontal scroll bar. For other documents, such as an MS Excel document that has multiple worksheets, the worksheet selection tools will be to the left of the horizontal scroll bar.

Saving to Efalia ECM

Electronic documents can be saved to Efalia ECM in a number of ways. By right-clicking on a document, you can select the ***Send To...Efalia ECM*** option. Alternatively, documents can be dragged to the Cabinet Control Panel. The Index capture window will then be displayed.

If the ***OfficeLink*** option was selected during the Component Service installation, MS Office documents can be sent to Efalia ECM from within the applications themselves. A Send to Efalia ECM tool is added to the Office applications ***Add-ins*** toolbars. In Office 2010/2013 for example, it is added to ***Add-Ins***, and can be added to the Quick Access toolbar.

Whichever method is used, the Index Capture window will be displayed, allowing the user to select which Cabinet and Document Type the document is to be saved to, and to add index data to be associated with the document. Once this is done, selecting ***OK*** in the Index Capture window will save the document to the Local Documents list within the WinClient.

Documents can also be dragged and dropped to Efalia ECM. If more than one document has been selected and dragged to the WinClient, the user will be asked whether all the documents should be saved together. If the user answers ***Yes***, The Index Capture window opens, and once the index data has been entered and the ***OK*** button pressed, all documents will be saved as a multi-page document in the WinClient. If the user answers ***No***, each of the documents must be indexed separately, and will be saved as single page documents.

Add to Existing Document

From the Index Capture window, you can perform a search for an existing document and then choose to either append or prepend the document.

If more than one document matches the search criteria used, the user can browse through the documents by using the ***Next Document*** and ***Previous Document*** tools to select the correct document to append or prepend the document to.

Additionally, if a value is entered into a field that matches an existing document, and the field has been configured to only allow unique values, the document will be added to the existing document, being appended or prepended depending upon the field configuration.

Revising a Document

For MS Office documents, if the original application is installed on the workstation, the document can be opened in the application by right-clicking in the display window and selecting ***Run Application***.

The document can be revised in the application and sent to Efalia ECM. The user will be automatically asked whether the document should be saved as a revision. If the user chooses not to save the document as a revision, the Index Capture window will open, to allow the user to index the document.

Automatic Indexing

Efalia ECM index fields can be configured to be automatically filled with information from a document, such as the file name and its creation and modification date. When the Index Capture window opens, and the appropriate Document Type is chosen for the document, those values will be shown in the fields configured for that information.

For emails saved from MS Outlook, information such as Email from, Email to, Subject, Date Sent and Received can be automatically added to Efalia ECM index fields, if configured.

Capturing Emails from Outlook

Emails can be sent to Efalia ECM from Microsoft Outlook, as for other Office applications, by using the ***Send to Efalia ECM*** tool.

Email Attachments

Efalia ECM can be configured to separate attachments from the email, and either save them as subsequent pages of the Efalia ECM document, of which the email itself will be the first page, or the attachments can be saved as totally separate documents.

For this to happen, setting keys need to be added to the Component Service configuration, which should be carried out by an Efalia ECM administrator. The file that needs to be edited is the ***app.xml*** of Efalia ECM Component Service, held in the Component Service installation location.

Attachments as Separate Pages

To save email attachments as separate pages, add the following key;

```
<add key="EMailSplit" value="On" />
```

This value can set to the following values:

Note

If there are pictures in html pages, they are also saved as separate pages in the document. The links in the html file cannot be displayed.

Parameter	Description
Off	Emails are saved as complete *.msg file and attachments can be opened only when the email is opened in Outlook
On	The attachments of emails are saved as separate pages of the document and the body is saved as an html page
Ask	With this option the user is asked during saving whether the attachments are to be saved as separate pages or not

Attachments as Separate Documents

When the attachments are to be saved as separate documents the following option is set to ***TRUE***:

```
<add key="NewDocsForAttachments" value="TRUE" />
```

The default value after an installation is ***FALSE***.

Sending Documents

Document can be sent by email, or can be sent to other users within Efalia ECM.

Send documents by Email

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.

If the document to be sent only contains black/white images, a multipage TIFF file is created and appended to the email.

If the document contains several file formats, the TIFF files are bundled and appended as a Multipage TIFF file. Colour pages are appended as JPEG files, any other formats are directly appended to the Email in their original format.

Attach as a PDF

With a setting in the WinClient, attachments to the email can be automatically converted to PDF format. This is set in ***Start*** ⇨ ***Options*** ⇨ ***Misc***. The advantage of this setting is that the recipient of the Email only needs a free Acrobat viewer to read the document. It can also not be edited and a *.pdf file is normally smaller than the original.

Configuration of Filename for Attachment

The file name of a TIFF file contains a time stamp, which is the creation date and time.

This file name is used when the user right clicks on a record in a document list on the square used to select documents and if command Send to Email is used. The subject and the file name are named accordingly.

If the send command is used from the right-click menu when clicked on one of the index fields, the index information is used as the file name.

The file name can be set manually, if an option in the WinClient settings is configured. Open *Start ⇨ Options ⇨ Misc*. The file name to be used can be configured to be made up of three parts and a field separator. The file name is assembled from these parts when Send to is used.

The relevant parts can be index information, a date field or the document type name. If a date field is used, one index field of the relevant document type must be configured to contain a date. If there are several date fields, the first date field is used.

Note

These settings may already be predefined in a client configuration in Enterprise Manager. In this case the user may not have the right to change this setting.

Sending a Single Document

Select the document to be sent in the document list.

Select ***Send to Email*** via the right-click menu.

The email Client will open a new message and attach the document to this new message. The recipient and a message will need to be added before sending.

Sending Multiple Documents

Select the documents to be sent in the document list.

Select ***Send to Email*** via the right-click menu.

The email Client will open a new message and attach the documents to this new message. The recipient and a message will need to be added before sending.

Sending Selected Documents

Select the first document you want to send in the document list. Now press and hold the CTRL key and select the other documents to be sent. After selecting the last document select ***Send to*** and now ***Email*** via right-click menu.

The email Client will open a new message and attach the selected documents to this new message. The recipient and a message will need to be added before sending.

Sending One Page of a Document

Open the document and display the page to be sent.

Select ***Email*** by right-clicking in the display window, or on the thumbnail

The email Client will open a new message and attach the page to this new message. The recipient and a message will need to be added before sending.

Sending Selected Pages of a Document

Select the pages to be sent from the thumbnails display of the document

Select ***Email*** by right-clicking on the thumbnails.

The email Client will open a new message and attach the pages to this new message. The recipient and a message will need to be added before sending.

Send Email as Link

When a document is sent via ***email as Link***, links to the document will be created automatically in the clipboard for the WinClient, for the browser WinClient and for WebServer to call the document.

After a new email is opened, the clipboard can be copied to the email body.

The links are composed of the settings configured in ***Start*** ⇨ ***Options*** ⇨ ***Misc***.

Note

When sending documents as a link, the recipient must be an Efalia ECM user, or anonymous access must be configured in WebServer for the recipient to be able to view the document.

Send Documents to users

The Inbox

Documents can be sent to other Efalia ECM users. The received documents appear in the Inbox of the user. When sending, a comment can be added as a note for the recipient, which is displayed when the document is opened.

Sending Documents

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

Notification

Under *Start ⇨ Options ⇨ Notification* a notification mode can be set, which will inform the user when new documents have been received in their Inbox.

Ad Hoc Workflow

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.

Create an Ad Hoc Workflow

From the ***Process Management*** toolbar, select ***Adhoc Workflow***. If there are no existing workflows, the ***workflow definition*** window will automatically open. The workflow name and step information can be entered.

If the user has existing workflows saved, the ***Create or edit adhoc workflows*** window will open. To create a new workflow, type the name it is to be given in the ***Name*** field, and then press the ***New*** button. The ***Workflow definition*** window will then open.

Edit an Ad Hoc Workflow

From the ***Process Management*** toolbar, select ***Adhoc Workflow***. The ***Create or edit adhoc workflows*** window will open, and will list the existing workflows.

From the list, highlight the workflow to be edited and press ***Edit***. The ***workflow definition*** window will then open, showing the workflow configuration.

Exiting workflows can be deleted from the list by selecting the workflow, and then pressing the ***Delete*** button

Workflow Definition

Within the definition window the workflow name and the step information can be defined. If the definition window was opened from the ***Create or edit adhox workflows*** window, the Name field will be automatically filled with the Name entered there.

If there are no existing workflows, the default name of ***New adhoc workflow*** will be in the Name field. This can be overwritten with a meaningful name.

Add user

To add a user to the workflow, click on the ***Plus*** button in the right of the window and select the user who is to perform an action from the drop down list. Only users who are in one the Efalia ECM groups, and have permissions to the Cabinet can be added. Several users can be added and the actions they have to perform defined.

Users can be deleted from the workflow by highlighting them in the list and pressing the ***Minus*** button

Actions

For each user added to the workflow and action to be taken can be specified

View

The user has to display the document and confirm the action.

Comment

The user has to confirm the action by commenting.

Approve /Reject

In the Windows Client two buttons will appear with the document in the Inbox which allow the document to be approved or rejected. A comment must be added to the document as part of the action.

Email

If this option is set in the workflow, the user will automatically receive an email containing a link to the relevant document.

In order to send Emails, an SMTP server must be configured.

Note

The users email address must have been configured and stored within the user properties in Active Directory, or in Enterprise Manager for Efalia ECM sub-domain accounts.

Automatic Settings

For each workflow, three automatic settings are applied.

- Before a document is returned to the originating user, all the users defined within the workflow must have performed their action.
- If a user does not perform their action within seven days of receipt of the document, the defined action will automatically time out, and the document will be released to return to the originating user.
- After completion of the workflow, the document is always returned to the originating user.

AutoCapture (Plus)

Edit forms out of the Efalia ECM WinClient



Due to changes in layout by suppliers, it might be necessary to edit existing forms.

The edit is initiated within the Efalia ECM WinClient.

The respective document is retrieved through the search functionality of Efalia ECM WinClient.

Note

This document must have been already processed by the Efalia ECM AutoCapture (Plus) routines.

This document must not be picked from the document type that is defined as AutoCapture inbox. Documents within this document type have not passed all Efalia ECM AutoCapture (Plus) routines yet.

When the document is displayed in WinClient, the editing is started through the ribbon bar icon ***Edit forms*** in tab ***Edit***. Now, the AutoCapture Client is launched and a drop-down menu lists all available suppliers.

After selecting a supplier, all forms of this supplier are listed in a drop-down menu, below.

When both is selected, the form can be edited.

In order for documents from an AutoCapture target document type to be used for forms processing, this document type must have been configured for full text when Efalia ECM AutoCapture was set up in Enterprise Manager.

Note

Efalia ECM Enterprise Manager **Include in full text OCR reading** und **Perform instant OCR reading**.

Edit index out of the Efalia ECM WinClient



The option ***Edit index*** in tab ***Edit*** of the Efalia ECM WinClient's ribbon bar initiates the index editing function, after a search action in the document type that is defined as Efalia ECM AutoCapture inbox.

The selected document must not have passed all the Efalia ECM AutoCapture routines and must be pending in the queue ***Postindex documents***.

It must also be a document that is pending in the Efalia ECM AutoCapture queue postindex documents.

The AutoCapture (Plus) Client is loaded and the selected document is displayed.

Changed and edited Zones are included in the ***smart recognition*** routine.

Note

If the document is not in the corresponding queue, the client does not display it in the viewer after opening it.

The classification of the document can be checked via the option **Statistic** in Efalia ECM AutoCapture (Plus) Client.

Cost codes



The option ***Cost codes*** in tab ***Edit*** of the Efalia ECM WinClient's ribbon bar initiates the cost code functionality.

Note

The allocation of cost codes is respectively possible, after an invoice was captured and processed successfully by **Efalia ECM AutoCapture Plus**.

For quick data entry, now opens a separate window.

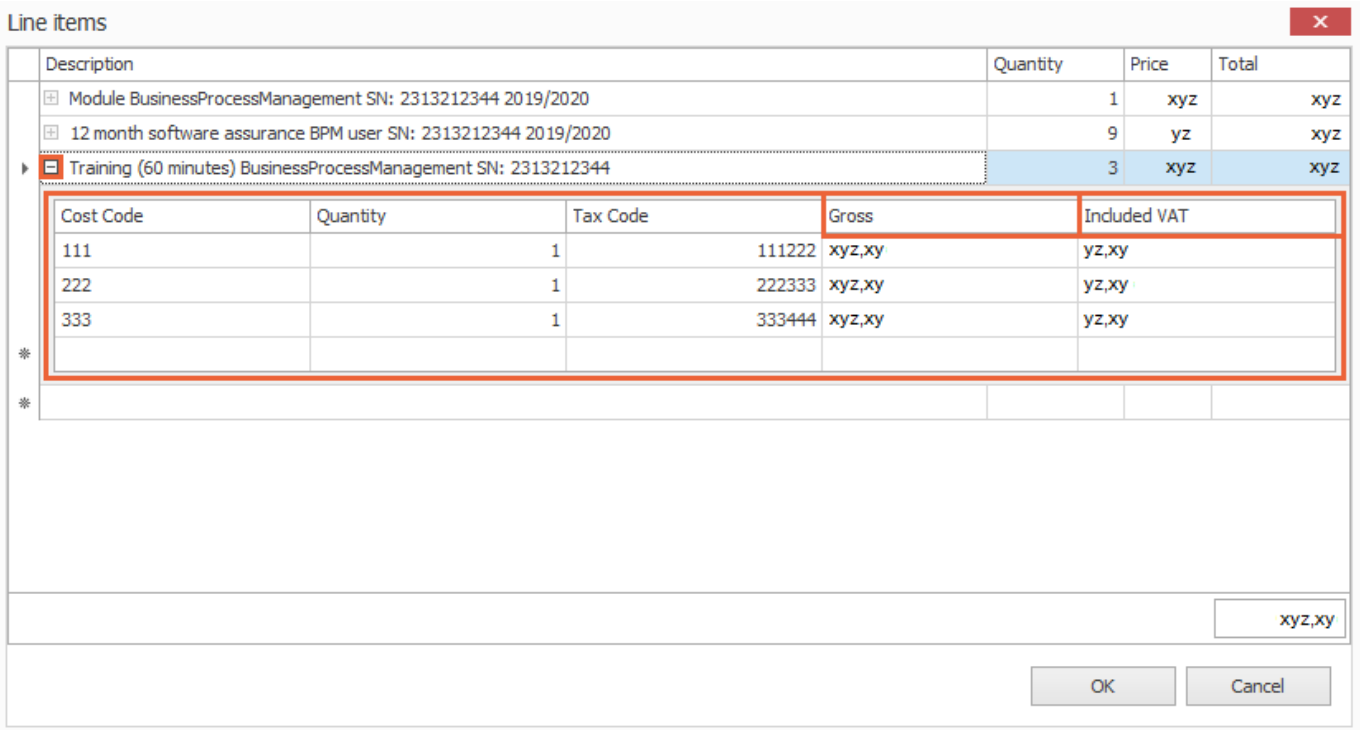
Using ⊞, at the beginning of each line item row, each table for the associated account can be created.

The ***cost code***, ***quantity*** and ***account*** columns are selected by an administrator in the Efalia ECM Enterprise Manager.

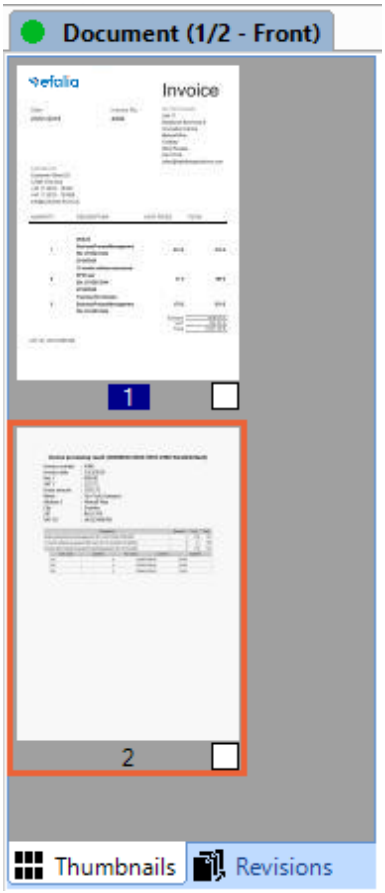
In addition, ***2 user-defined columns*** can be defined in the Enterprise Manager by the administrator, which are displayed at the end of the table.

Example

In the example shown below, ***Gross*** and ***Included VAT*** included have been defined for this.



Example



After the cost codes have been entered, this information is transferred and embedded in the attached PDF file.

The first thumbnail, labelled ***1***, shows the actual invoice and the second thumbnail, labelled **2**, shows the PDF file that is attached after a successful processing by Efalia ECM AutoCapture

.

Business 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. BusinessProcessManagement controls the path of a document through the process steps and keeps track of the status and location of a document.

Send To Process

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

Manual Sending

To send documents manually to processes:

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

Automatic Sending

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

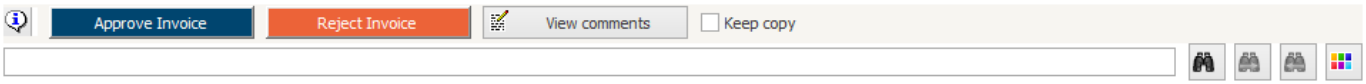
- New documents added to a Document Type optionally depending upon index criteria set for the document
- Existing Documents within a Document Type, depending upon index criteria set for the document.

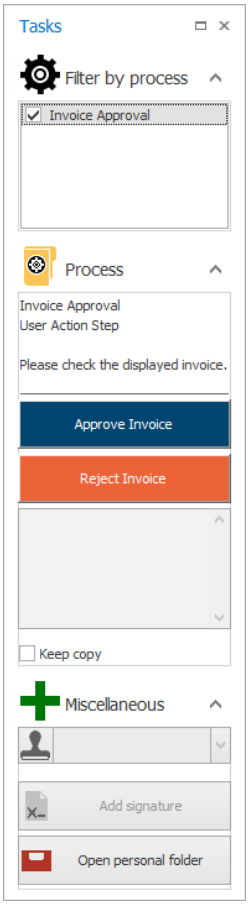
Document Receipt

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

When a document is opened, the following will happen:

When Layout Style 1 is being used, a button is displayed in the display window to perform the relevant action. The comments are also displayed which may already have been added by other users.





When Layout Style 2 or 3 is being used, a Tasks pane is opened on the right of the display window, which will allow the user to perform the relevant action. The comments are also displayed which may already have been added by other users.

Once the action required has been performed, the document is closed and sent back to process management control. Should it be necessary, a link to the document in your Inbox can be kept by selecting ***Keep local copy*** before performing the required action.

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:

No action

Action ***None*** 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. Prior to confirming the action, the user can select ***Keep Document***. When this is selected, the document will remain in the users Inbox after the action has been performed.

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 windows 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. Prior to confirming the action, the user can select ***Keep Document***. When this is selected, the document will remain in the users Inbox after the action has been performed.

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. Prior to confirming the action, the user can select ***Keep Document***. When this is selected, the document will remain in the users Inbox after the action has been performed.

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.

Keep Document

If you decided to keep a copy of the processed document in your Inbox, this can be removed at any time. This only removes the document from your Inbox, and does not affect the server copy. The document cannot be removed from the list if it is checked-out.

Interactive Branch

Another type of user action within the process management can be caused by an ***Interactive Branch***.

Interactive branches are needed, when for documents of the same type, variable target steps within the process management are possible and a routing by index field values is not possible.

For this purpose, a pop-up window with options is displayed to the user.

These options are defined by an Efalia ECM administrator in Efalia ECM Enterprise Manager.

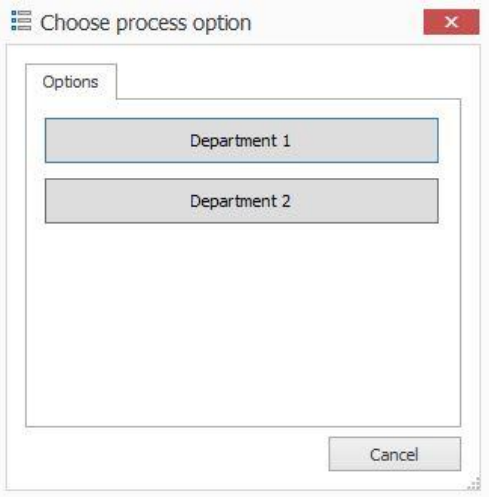
Note

An **Interactive Branch** must be directly connected to a **user action**. The selection is displayed for the user who took action in the step before.

Example

Interactive Branch

The example below shows an ***Interactive Branch*** with two options.



Process Status

The current status of a document on a process can be displayed. For each document, the process name, the user where the document is currently located, the action which the user must perform, the name of the user who sent the document to the process, and the date and time when the document was sent to the process is displayed.

Any document in a process can be retrieved and commented upon from the process status. The process list can also be printed and, if necessary, the document can be cancelled from the process. From the ***Extras*** menu, select ***Process Status***

For a specific document, the same information and actions can be performed by right-clicking on the document, selecting ***Document Info***, and then selecting the ***Processes*** tab.

Configure Absence

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

The settings can be applied by selecting ***Extras*** ⇨ ***Absence Settings***. This can also be done by an Efalia ECM administrator in Enterprise Manager.

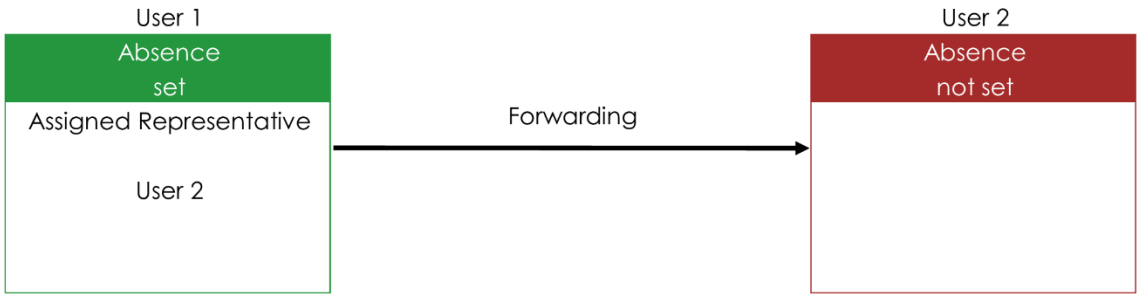
Example

Only one representative is set.

User 1 sets only ***User 2*** as representative.

User 2 does not have an active absence setting.

The documents are forwarded to ***User 2***.



Example

Only a single account is defined as a representative.

User 1 sets only ***User 2*** as representative.

User 2 has also an absence set.

The documents ***are not forwarded***.



Example

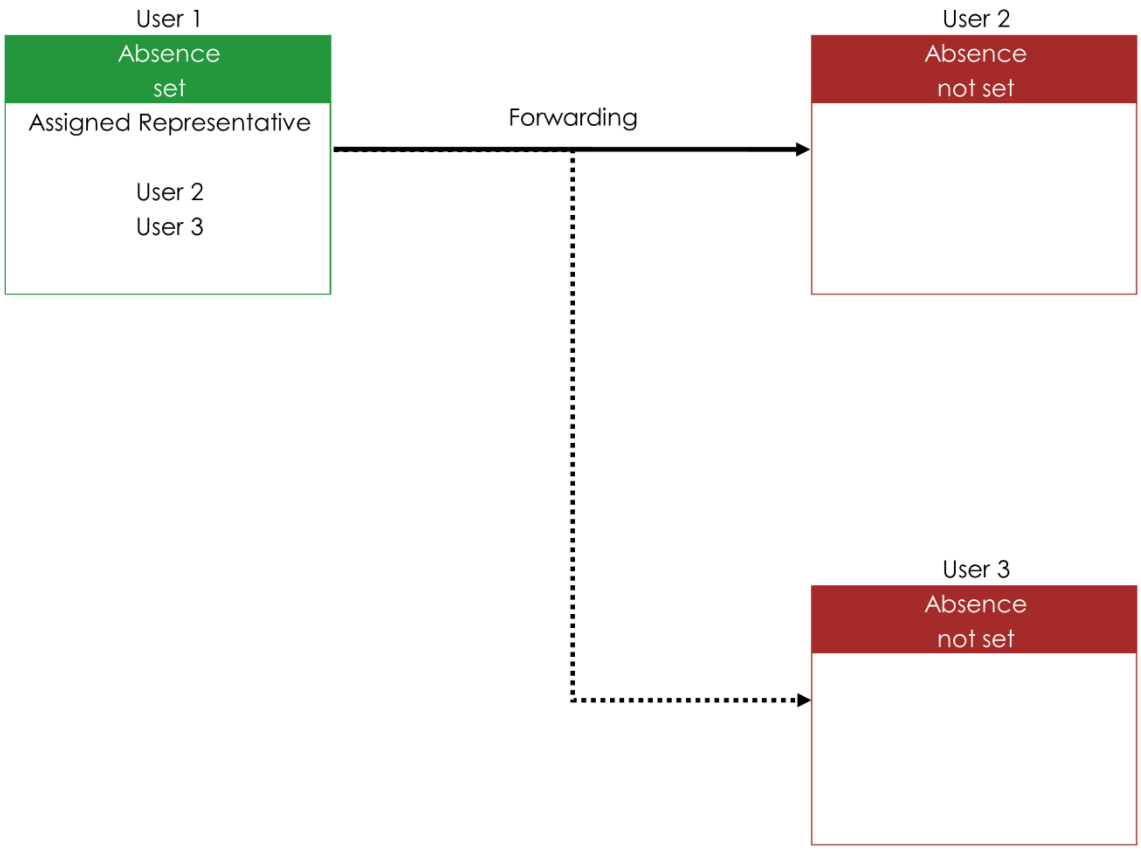
Multiple accounts are defined as representatives.

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

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

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

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



Example

Multiple accounts are defined as representatives.

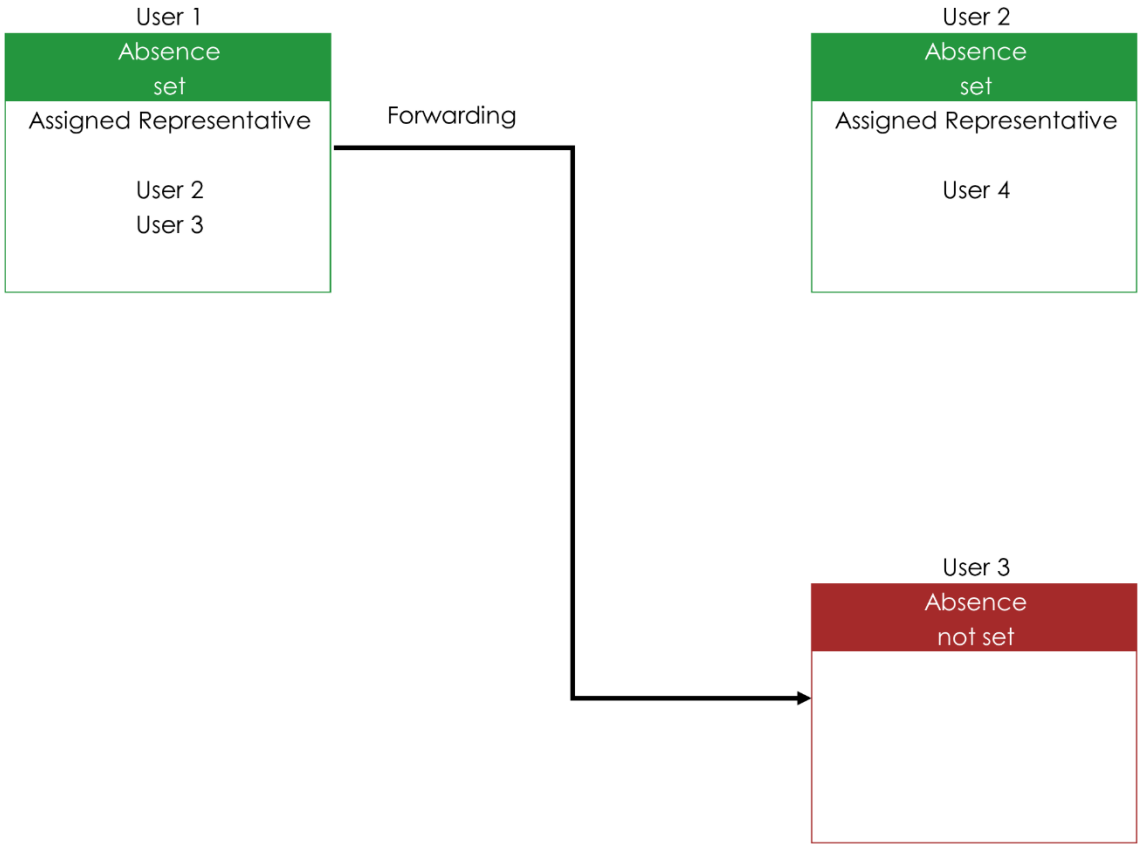
User 1 sets ***User 2*** and ***User 3*** as representatives during his absence.

User 2 has also an activated absence.

User 3 has not activated the absence setting.

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

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



Example

Multiple accounts are defined as representatives.

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

User 2 and ***User 3*** have also an activated absence.

The documents ***are not forwarded***.



Sign Documents using a Signature Pad

A Process can be configured so that documents must be signed in order to approve them. A licence and specific hardware is required for this. Efalia ECM can use several different pads. The configuration of this is described in the *Signatures* section in the ***Options Settings*** chapter.

If a user has to sign a document, a window will open for the user to write their signature on the pad. This will then be compared with the sample signatures entered during the configuration, and if it matches, the signature will be accepted. If it is not accepted, the user must try again.

Document Information

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

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

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

Information on each page of a document can also be displayed by right-clicking on the page within the document window and selecting ***Info***.

Document

This displays general information about the document

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

Information	Description
Certificates	Lists any certificates applied to the document

History

The document history contains a log, which lists who retrieved and changed the document.

Information	Description
#	Number of the listed action
Action	Type of action: Created, Retrieved or Modified
Created on	Date and Time of action
Created by	User account involved

Processes

In Processes, all actions that have been performed on the document within a process are listed.

Information	Description
Process	Process name
User	User account involved in this step
Action request	Action requested from user
Action response	Action taken by user
Action taken on	Date/Time of action taken
Comment	Comment added during execution
Signature	Signature used by user for action
Created by	User account involved when sending
Created on	Date/Time when document was sent

The order in which columns are displayed can be changed by clicking on the column header, and dragging it to the required location. Similarly, columns can be removed from being displayed by dragging the column header towards the centre of the window, until a large ***X*** is displayed, and then releasing the left mouse button. The changes made will be saved. The original layout can be restored by right-clicking on any column header and selecting ***Restore layout***

Sent-To

This tab displays a list of users which have received and sent the document.

Information	Description
User	User account to which the document was sent
Comment	Comment added to the document
Created by	User account from which document was sent
Created on	Date/Time when document was sent

Page Information

This displays information about an individual page of a document. This does not apply to formats such as Acrobat and MS Office documents.

Information	Description
Cabinet	Name of Cabinet that document is stored in
Document type	Name of Document Type which document is stored in
Document ID	Unique number (ID) of the document
File type	File type (TIFF, BMP or JPEG)
Width (Pixel)	Image width in Pixel
Height (Pixel)	Image height in Pixel
Resolution X (DPI)	Horizontal resolution
Resolution Y (DPI)	Vertical resolution
Colour depth (Bits)	Colour resolution in Bits

Information	Description
Uncompressed size	Size of uncompressed image
Compressed size	Size of compressed image
Compression rate	Compression rate in per cent

PDFPrinter

Print and Index

Start the WinClient.

Open, for example Word, create a document and print the document, using ***Efalia ECM Print to PDF***.

Now, the index capture window of Efalia ECM WinClient opens and the corresponding index information can be added to the document:

In case WinClient was not open during the printing process, the index capture window will open the next time Efalia ECM WinClient is started.

Important

If the process is cancelled within the index capture window, the corresponding document on the folder is removed after the WinClient is closed.

Reports & Scripts

Scripts configured by an Efalia ECM administrator within Enterprise Manager enable a user to run data queries on Efalia ECM without any knowledge of or access to SQL server.

The scripts can contain parameters that have to be set by the user.

Using scripts

Select ***Reports & Scripts*** to list the available scripts. Only those scripts that a user has rights to will be listed.

To run a script, choose it from the list and select ***Execute***. If the script needs manually entered parameters a window opens where the parameters must be entered. The window ***Script execution results*** will then open.

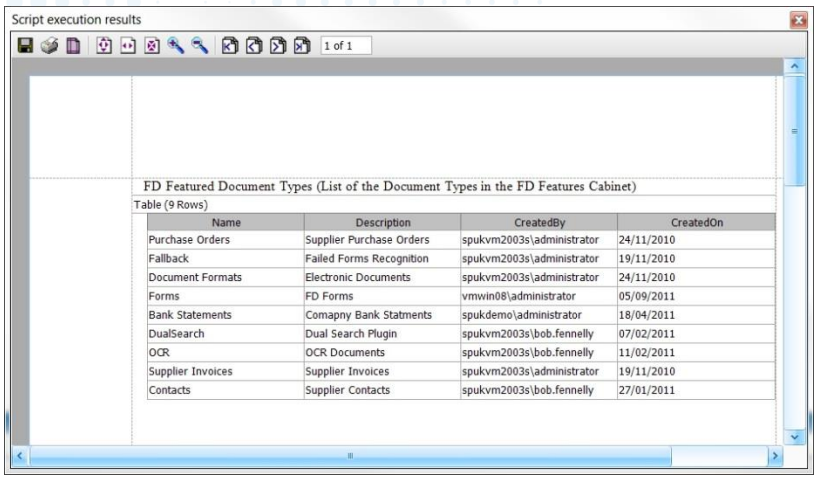
Script Results

The script results window will display the information returned by the script query, in tabular format.

Export

The report can be printed, or can be saved in the following formats: PDF, XLS, RTF and CSV, by selecting ***Export***. The report can be paged through and different zoom levels can be selected

Example


Script execution results
1 of 1
FD Featured Document Types (List of the Document Types in the FD Features Cabinet)
Table (9 Rows)
Name
Description
CreatedBy
CreatedOn
Purchase Orders
Supplier Purchase Orders
spukvm2003s\administrator
24/11/2010
Fallback
Failed Forms Recognition
spukvm2003s\administrator
19/11/2010
Document Formats
Electronic Documents
spukvm2003s\administrator
24/11/2010
Forms
FD Forms
vmwin08\administrator
05/09/2011
Bank Statements
Comapny Bank Statments
spukdemo\administrator
18/04/2011
DualSearch
Dual Search Plugin
spukvm2003s\bob.fennelly
07/02/2011
OCR
OCR Documents
spukvm2003s\bob.fennelly
11/02/2011
Supplier Invoices
Supplier Invoices
spukvm2003s\administrator
19/11/2010
Contacts
Supplier Contacts
spukvm2003s\bob.fennelly
27/01/2011

Tasks and Forms

The ***Tasks*** bar lists HTML forms provided through the Enterprise Manager. The forms listed can be either predefined HTML-forms uploaded in ***Overlays*** node or forms created in ***Form Designer***. Forms, uploaded in node ***Overlays***, can be opened in WinClient, where fields can be filled and the form can be stored in Efalia ECM. Forms, created in Form Designer, can additionally have a link to the form that can be saved to clipboard and used in other applications e.g. an email client. The recipient can open the link to the form in a browser.

The fields within the template can be linked to Efalia ECM index fields so that when the form is saved, the index fields are automatically filled.

This can be a very useful feature for completing forms that are to be sent to customers or suppliers as well as being stored in Efalia ECM, as the whole process can be completed within the WinClient.

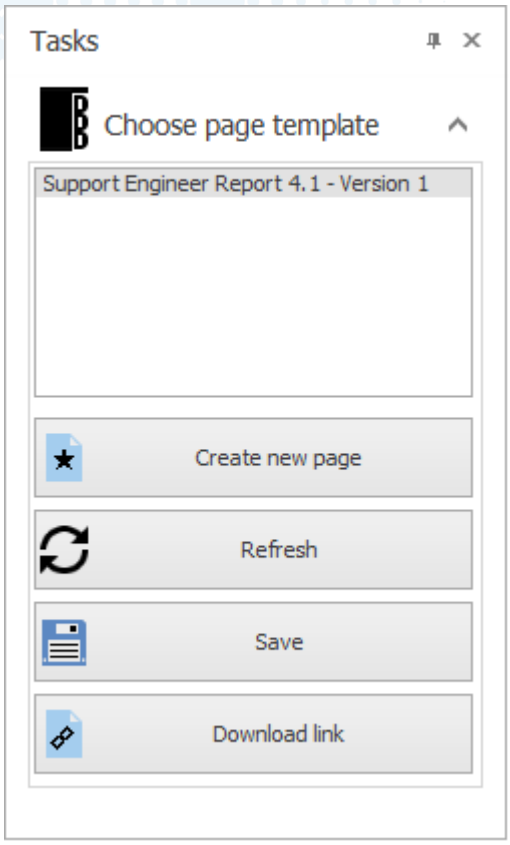
Providing templates/forms

The templates shown in ***Tasks*** are configured in Enterprise Manager through the ***Overlays*** or ***Forms*** in a Cabinet.

Using forms through the Efalia ECM Enterprise Manager node ***Overlays***, requires previously created forms in HTML-format

The Efalia ECM option ***Form Designer*** allows creating HTML-forms through a graphical user interface in Efalia ECM Enterprise Manager.

Using templates/forms



After selecting ***Create page from template*** in the WinClient the ***Tasks*** panel will open on the right side of the WinClient.

The templates available will be listed.

Form names with an ***.htm*** ending indicate that these forms are provided through the Efalia ECM Enterprise Manager node Overlays.

Forms, created through ***Form Designer***, are listed with the name set in Efalia ECM Enterprise Manager.

Create new page

Highlight the template you want you use, and select Create new page. The template will be opened in the display window. And the fields contained within the template can be completed.

Refresh

Refreshes the fields connected in the HTML-template.

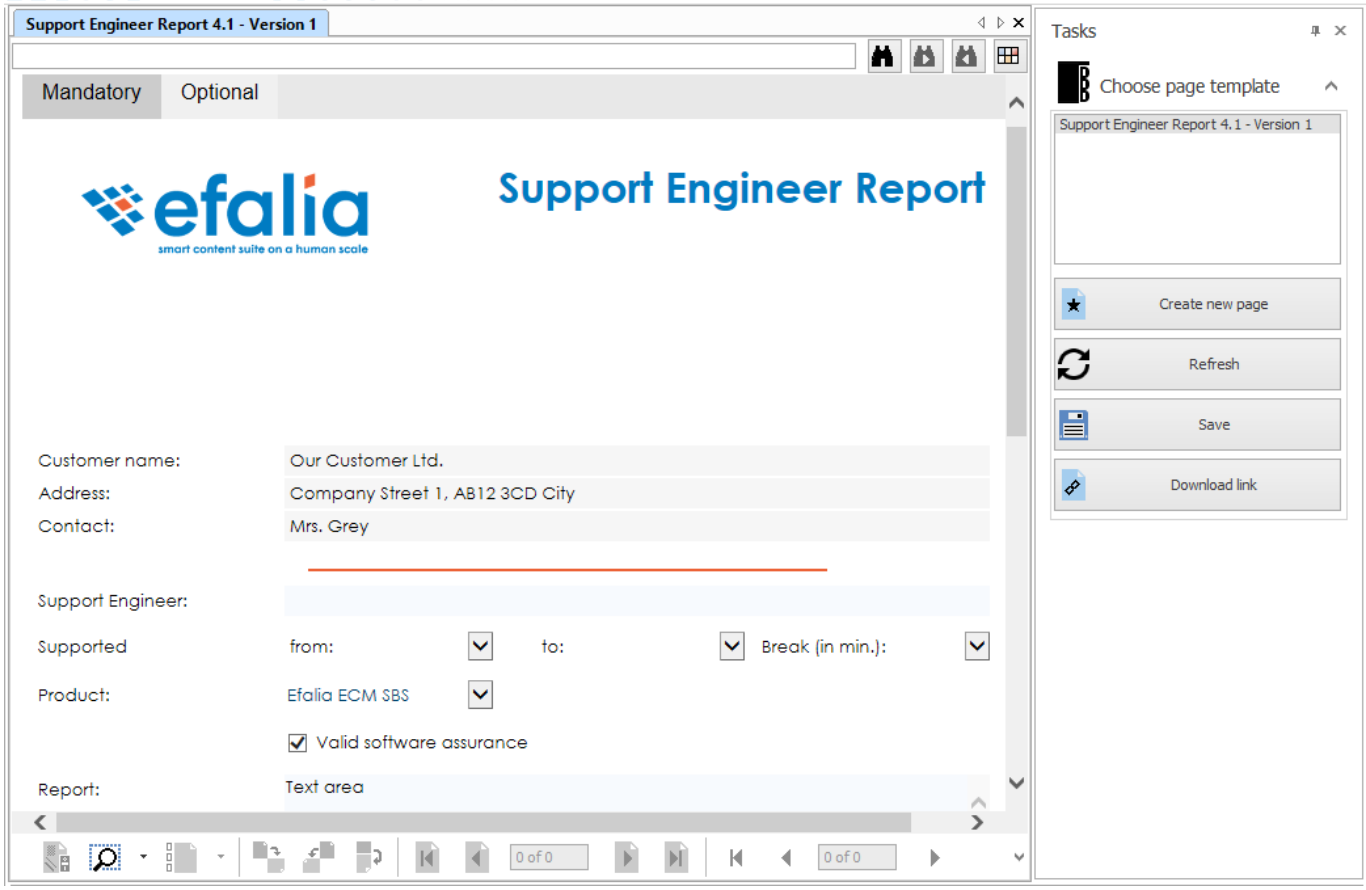
Save

This will Save the HTML-template, fill the Document Type index fields from the fields on the template, and place the document in the Local documents list.

When the form is provided through the node ***Overlays***, it depends upon the setting applied to the template, whether it is converted to an image, or stay in HTML format.

Forms, provided through the node ***Forms***, stay in HTML format.

Example



Download link

Download link generates a link (URL) to the selected form and stores the link in Clipboard. This link can be pasted by using CTRL+V into other applications, e.g. an email client.

Note

For each form the settings configured in Efalia ECM Enterprise Manager is applied, e.g. **one time use**.

Editing existing values



Values in forms that were saved in the WinClient using the ***Save*** button in the area ***Tasks*** can be changed in Edit mode and the update can be applied to the index fields.

To do this, the document must be searched for document the Search tab.

The document is now shown in the hitlist and can be selected. When the document is shown in the viewer, it must be switched into Edit mode.

When in Edit mode, a Save icon is displayed in the upper left corner of the displayed document image.

The new values can be entered into the form fields and are saved through the Save button and the corresponding index fields are updated.

Note

Only values in forms stored in HTML format can be edited. Values in forms stored in PDF format cannot be edited.

Options Settings

The WinClient can be configured to perform certain functions automatically, and you can configure how other functions are carried out. Settings can also be applied as to how the WinClient will look.

These settings can be stored for each user on the Efalia ECM server and be downloaded to the WinClient opened by the user on any workstation, so that their settings are constant.

To change these settings, select ***Options*** from the ***Start*** toolbar. The various settings can then be configured within the tabs available.

General Settings

Open last used Cabinet

When selected, the last used Cabinet is automatically opened when the WinClient is started.

Remove new documents after check-in

When selected, new documents will be automatically removed from the local list once they have been checked-in to the Efalia ECM server.

Remove revised documents after check-in

When selected, revised documents are automatically removed from the local list once they have been checked-in to the Efalia ECM server.

Remove local documents after sending to process

When using the process management the documents which are sent to a process are saved in the Inbox of the user. If a document is to be removed after the user has performed their action, this option should be selected.

Remove local documents after Undo check-out

With this option set, any documents in the local document list will be removed from the list if ***Undo Check-out*** is selected.

Don't remove from search result list

After changing the index data of a document, it will be checked-in again and disappears from the search list. With this option set the document remains on the search list even if it does not match the search criteria after the index change.

Auto Check-In new documents

When new documents are created, they are normally stored in the local document list on the workstation and have to be checked-in from this list. With this option new documents are immediately checked in.

Auto Check-in External Documents

When set, this option will automatically check-in new documents being saved to Efalia ECM via the index capture window, such as when using the ***Send to Efalia ECM*** option in Windows Explorer.

Auto. Check-in new documents after edit

With this option set, new documents are automatically checked in to the server only after the index data has been edited.

Auto. Check-in revised documents after edit

With this option set, existing documents are automatically checked in to the server after the index data has been edited.

Verify integrity of unsigned documents

A check sum, a so called ***hash code*** is generated for each document. When document data is changed in the file directory of the server, the check sum will not match with the original data. A manual change of the data will be displayed with a red icon in the WinClient.

Sign PDF file

This option allows certificates to be added to PDF documents. The certificate that you want to use for signing, must be installed on the local computer first and then added within the option tab ***Signatures*** in the section ***Digital***.

Note

PDF files are signed when a PDF file is checked-in.

Language

The language used by the WinClient can be selected. By default the language of the operating system (Windows) is used, but it can be changed to one of the following languages:

English (UK)	Portugues
English (US)	Espanol
English (India)	Japanese
Deutsch	Chinese (Big5)
Francais	Chinese (Simplified)
Dutch	

If you switch to a different language, select a language from the drop down list and click OK. The WinClient will have to be restarted.

Misc Settings

Convert to PDF

With this option set, the documents which are to be attached to a new email (***Send to ... Email***) are automatically converted to PDF and then attached.

Note

Electronic documents cannot be converted to PDF.

Attachment file name composition

The name given to any attachments can be defined within these settings. The separator is the character to be used between the single parts of the name.

Reset Zoom when displaying new page

With this option set, the current zoom factor is not kept when a new document is selected to be displayed the display switches to a new page.

This option can be useful when indexing documents with the same layout. In this instance de-select the option.

Use area post-indexing

If this option is set, the zoom parameter is saved for each index field individually. This allows for fast and easy manual indexing. If the field contents are always located at the same position on the document, the zoomed part always moves to the correct location.

Image Enhancement

When set, this option turns on the WinClients image rendering, which enhances the display quality of images.

Show post scan options

If this option is selected, a window appears after batch scanning, which allows the user to select the next actions

Save scanned pages

The scanned pages are stored as one document.

Scan new batch

After a scanning process has been terminated, a new document will be created when a new batch of pages is scanned.

Continue scanning

Scanning can be continued and further pages can be appended to the current document when this option is selected.

Delete last page

It may be that an index or separation pages are inserted between the documents. If this option is selected, the last page scanned is automatically deleted.

Show line number in document lists

By selecting this option the line number will be shown at the beginning of each line in each document list.

Alternate line colours in document lists

The background for each line in the document lists will alternate between two colours. The colours of the lines are set by the system.

Show documents after single click

By selecting this option, the document will be displayed after the first click on the document record in the document list and it is downloaded to the local cache. When this option is not selected, the page will be shown and downloaded only after performing a double click.

This option is available for *Local Documents* and Hitlist.

Note

The option Show documents after single click cannot be used in combination with the option Fullscreen lists..

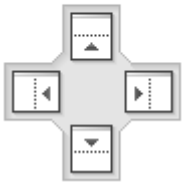
Show documents after process action

By selecting this option, working with multiple BusinessProcessManagement documents in an inbox becomes even more convenient. After performing an action for a document in process management, the next, waiting document is displayed immediately.

The option is quite similar to the button ***Save and move to next document*** in the tab ***Edit*** of the control panel. When a ***user action*** in process management was performed, the next document in the document list ***Inbox*** is selected.

Allow floating control and list windows





Dynamic arrows showing possible positions appear during the positioning of control bays and lists via drag drop. This option can be set to provide this method of free positioning. When this option is disabled, control bays and document lists cannot be moved freely.

Explorer like tree search

When ticked, a search is limited to only the currently selected node of the filing system. Sub nodes will not be included in the search.

Immediate stamp embedding

When selected, stamps are immediately embedded as part of an image and cannot subsequently be changed.

Disable process action with loss of focus

When selected, respective process action buttons of a process step are disabled, when the focus is being moved from the corresponding document.

This option ensures that users see always the corresponding process management document when performing a process management action.

Show currency symbol

When selected, Efalia ECM WinClient adds a currency symbol in amount fields. This is added to the amount fields of the control panel and the document lists.

The symbol is added for display purposes, only.

See: AutoCapture Fields.

Custom quick start program

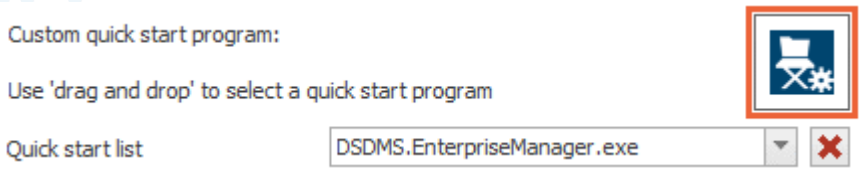
If the Efalia ECM Component Services are installed, an Office quick start toolbar will be created in the WinClient.

Note

Microsoft Office must be installed on the workstation.

This quick start toolbar can be customised by adding additional applications to be available from the Efalia ECM WinClient. The applications are added by a drag&drop action on the corresponding application file from the Windows Explorer to the box marked in the example below. In this case, the Efalia ECM Enterprise Manager will be added to quick start toolbar.

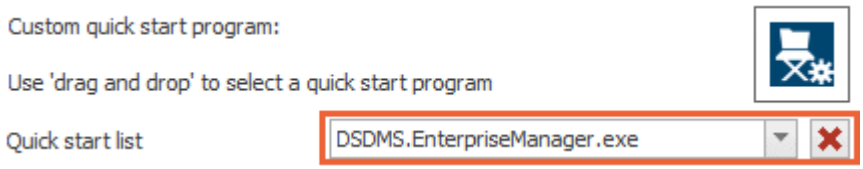
Example



Quick Start List

The Quick start list shows the links created for the quick start programs, and allows them to be deleted, by selecting them in the list and using . 

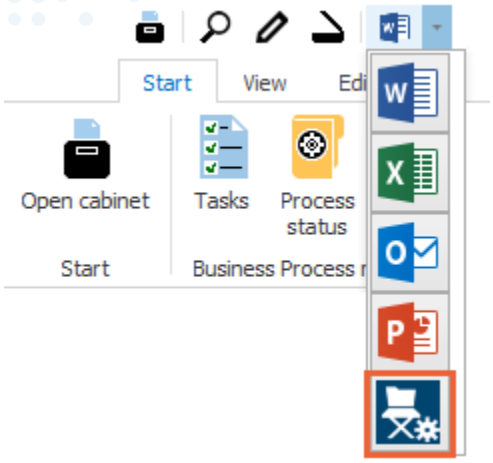
Example



Note

The customised applications are shown below the Microsoft Office quick start applications in the order they've been added.

Example



Document Type

Using this option, you can select the default Document Type to be shown in the Control panel whenever the currently open Cabinet is subsequently opened.

Note

This option is only visible when a cabinet was selected. The drop-down menu shows the corresponding document types of the active cabinet

Notification

Disable client notification

Select this setting if the notification of new documents in the Inbox is not required.

Note

If the notification is switched on, the client will connect to the server in a fixed schedule. This may prevent the license used being freed again for another user

The Inbox can be refreshed manually by pressing **F5**.

Scheduler based passive notification

Select this option if you want to be notified when a new document is received in your Inbox

The interval, in minutes, must then be specified in which the WinClient should check for new documents in your Inbox. Select the types of notifications in Notification options.

Display document list:

When new documents arrive in personal folder the document list of the personal folder is displayed.

Icon in task bar:

A folder Icon appears as a notification for the arrival of new documents in your Inbox. The number of new document is displayed if you position the mouse cursor on the folder icon.

Display message:

A notification message window is opened, which informs you about the arrival of new documents in your Inbox.

Play sound:

A notification sound is played, which informs you about the arrival of new documents in your Inbox.

Print

Pagination

Choose whether you want a page number printed on the document or not.

None

No page number is printed on the document.

Simple
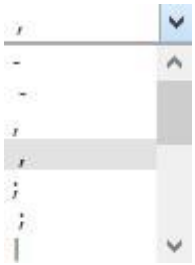
The page number is printed on the top right of the page.

Extended

The page number and the total number of pages will be printed on every document.

Separator

The separator for the printed fields can be selected from the following pre-defined separators:



Standard fields

Up to eight fields can be chosen, which will then be printed on the document.

These are:

None

Program

Version

Computer name

User

Date and Time

Clicked field

Date field

Document Type name

Print hitlist row

When this option is ticked all fields in the document list row are printed as a header to the document. When unticked, no index field content is printed, unless the Standard fields index data printing has been configured, which is described above..

Exact scale print

With this option set, documents are printed in their original size exactly as they were scanned. The image is not sized to the output format.

Print using smart page rotation

As a document is printed the page format is set to the format of the printer and automatically rotated. This option can be used, if e.g. A3 and A4 documents are to be printed and must be rotated differently on several printers.

Hitlist

When printing records from a document list the following can be set

Select fields before printing

With this set, the index fields to be printed can be selected. When not set, all fields are printed.

Print Gridlines

With this set, the document list is printed with borders and lines separating each line and column

Layout

The Layout option allows you to configure how the WinClient will look, and what type of tool icons will be used.

WinClient Layout

There are three styles available.

Note

The default settings are WinClient Layout **Style 3**, Skin **Office 2013** and **Flat colour icons**.

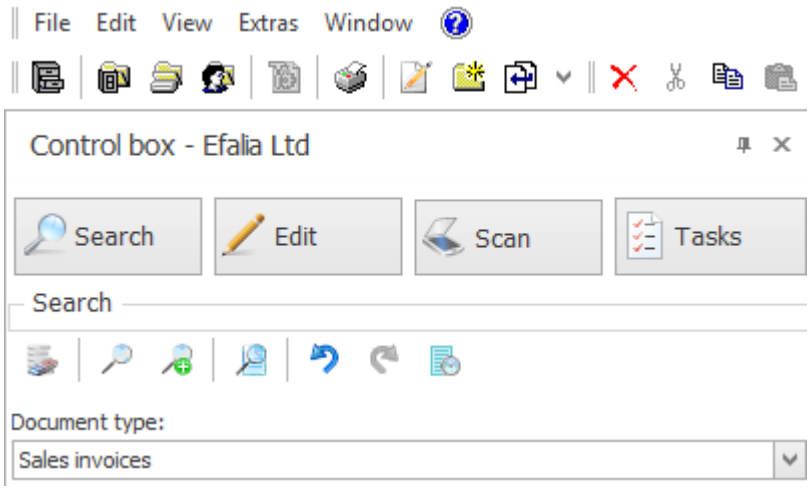
Style1

This uses standard menus and icons for the toolbars and Cabinet Control Box



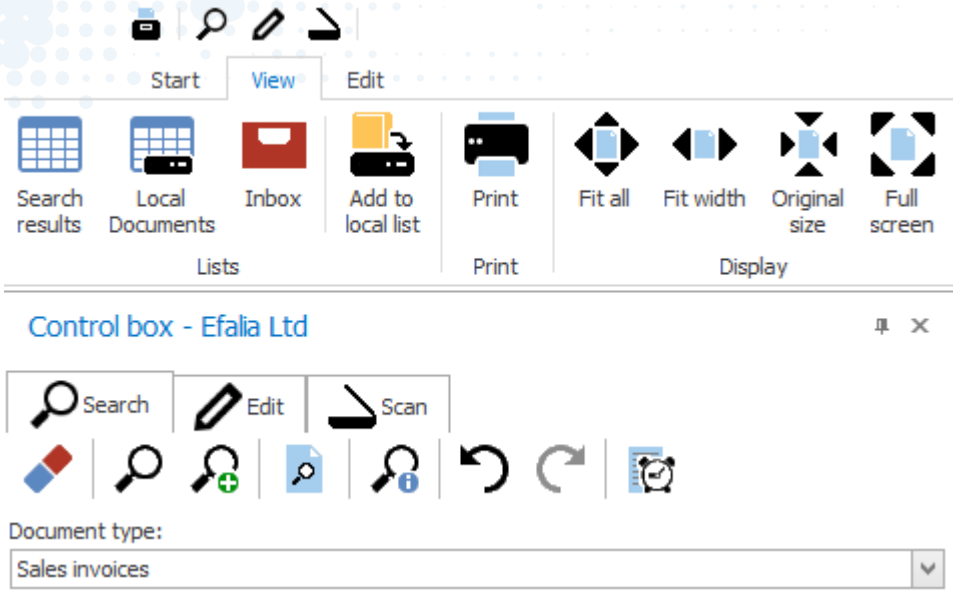
Style 2

Style 2 uses the same icons and toolbars as Style 1, but the Cabinet Control Box uses buttons instead of tabs, and the process Management Tasks pane can be opened from the Control Box.



Style 3

Style 3 does not have a menu bar and groups tools to 3 areas; Start, Display and Edit/ the tool icons are larger and where possible, will state their function. The Cabinet Control Box also uses different icons.



Skin

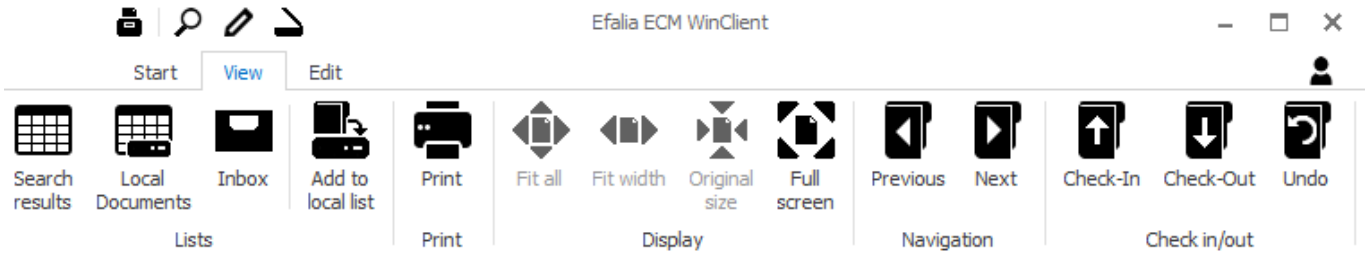
The Skin option allows you to select the general colour scheme used by the WinClient. There are several options available.

Icon Style (Style 3 only)

The icon style option allows you to choose between three different icon style sets. This option is only available when ***Style 3*** has been selected from the drop-down menu ***Skin***, above.

Flat black icons

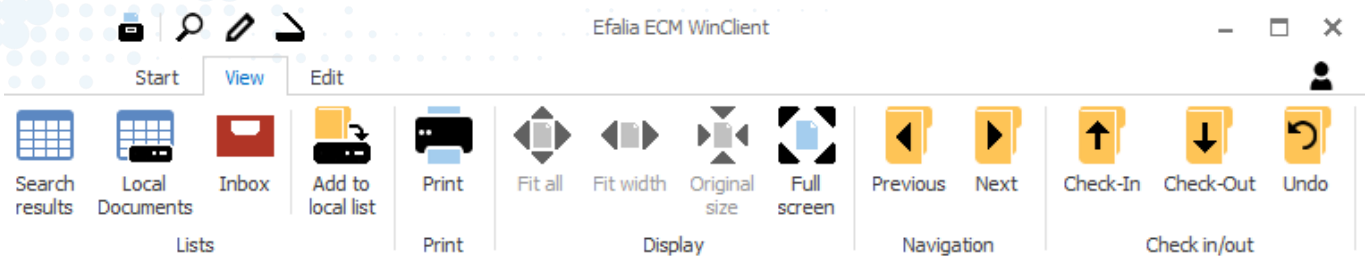
Below, you will find some examples of this icon set.



Flat colour icons

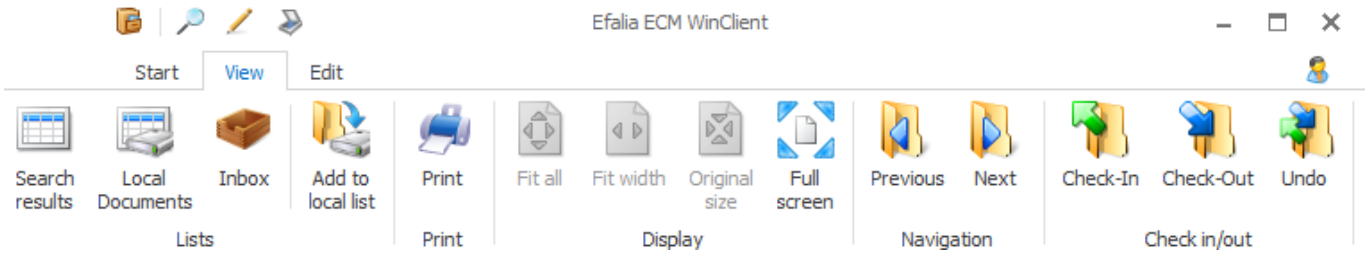
Below, you will find some examples of this icon set.

This example shows also the WinClient default design setting.



3D colour icons

Below, you will find some examples of this icon set.



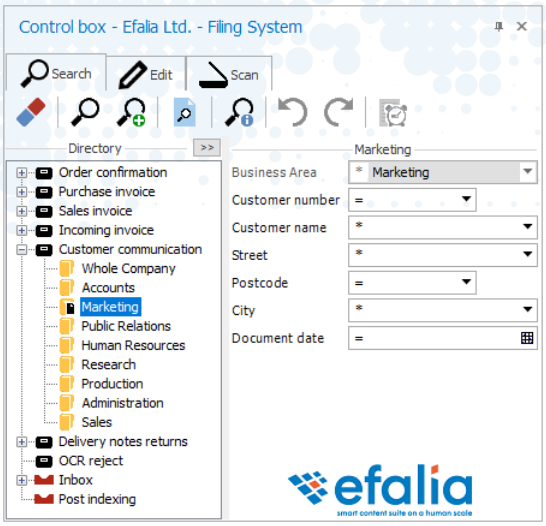
Context menus

You can select whether the context menu's – those that are displayed when you right-click, use large or small tool icons.

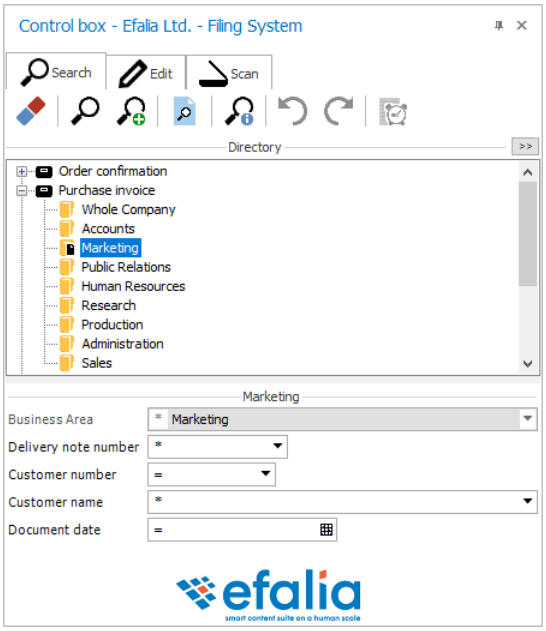
Tree position

You can select the position of the tree of your filing system structure. The tree can either be displayed left of your index fields, above or below them.

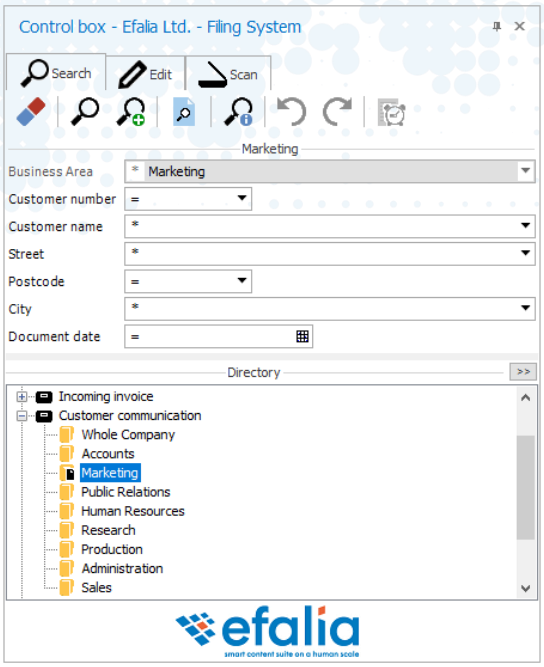
Left


Control box - Efalia Ltd. - Filing System
Search
Edit
Scan
Directory
Order confirmation
Purchase invoice
Sales invoice
Incoming invoice
Customer communication
Whole Company
Accounts
Marketing
Public Relations
Human Resources
Research
Production
Administration
Sales
Delivery notes returns
OCR reject
Inbox
Post indexing
Marketing
Business Area
Marketing
Customer number
Customer name
Street
Postcode
City
Document date
efalia

Top


Control box - Efalia Ltd. - Filing System
Search
Edit
Scan
Directory
Order confirmation
Purchase invoice
Whole Company
Accounts
Marketing
Public Relations
Human Resources
Research
Production
Administration
Sales
Marketing
Business Area
Marketing
Delivery note number
Customer number
Customer name
Document date
efalia

Bottom



Note

This setting is only taken into account when using a filing system structure.

Fullscreen Lists

With this option you can determine the default views for the document lists and document display window. When selected, the document lists and display window are opened in full screen mode, with the lists and display window selectable by tabs.

Document Viewer Reuse

Used in conjunction with the ***Full screen Lists*** setting, this will, when selected, open each document in the same document display window. When not set, a new tabbed document display window will be opened for each document viewed.

Note

The list **Local documents** is not displayed on WinClient start, if empty

Immediate display of local list

With this option, the list ***Local documents*** is displayed when starting WinClient.

Immediate display of inbox

With this option, the list ***Inbox*** is displayed when starting WinClient.

Note

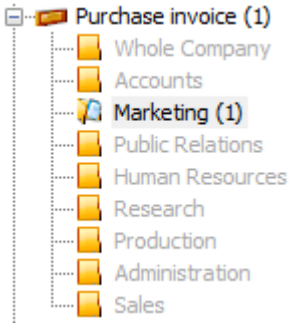
The option Fullscreen lists cannot be used in combination with the option Show document after single click..

Add document count to tree node

Choosing this option, a document count is added in brackets to the tree node's end.

These information is added after running a search.

Example



Display Zoom Slider



This option controls whether the zoom slider in the status bar on the bottom right of Efalia ECM WinClient is displayed or not.

Expert mode

Activating or deactivating this mode, affects the number and types of the elements and menus, displayed in the toolbars, ribbon bars and context menus.

Note

For more information see: Expert mode.

Messages

Reminder to check in new documents on program exit

With this option set, the user is informed that new documents are still stored in the local list which have yet to be checked-in. This reminder appears when the user closes WinClient.

Reminder to check in documents on program exit

With this option set, the user is informed that new or changed documents are still stored on the local list and have not yet been checked in. This reminder appears when the user closes WinClient.

Warning before a document with 0 pages is checked-in

With this option set, a user is asked whether a document with 0 pages should be checked in. This may happen after creating a linked document.

Warning when a document with 0 pages is displayed

With this option, a warning is displayed when a document with 0 pages is selected for display.

Warning when annotating changes causes check-out

With this option set a confirmation message is displayed when an annotation is added to a checked-in document or an existing annotation is changed on a checked-in document.

Warning when documents are combined by user

When set, this option will display a confirmation message before the selected documents are combined.

Signatures

There are different ways in Efalia ECM that a document can be signed. You can use an electronic or a personal signature.

An electronic signature is used as proof of authenticity with a certificate when the documents are sent to the server. These documents cannot be manipulated, because the original documents are checked.

In comparison to that a personal signature is a way to sign a document as you would on paper.

Digital

When a document type is configured only to accept signed documents, any user adding a document to that document type will require a digital a certificate. This certificate must be provided to the user and can be loaded from the appropriate storage medium.

The following stores are selectable:

- Active Directory user store
- Current user store
- Smart card store

To obtain a certificate and to know from which server the certificate can be loaded, please ask the administrator or an official trust centre.

Using a Signature Image File

Usually a document must be signed on the paper before it is scanned. With Efalia ECM you can place a scanned signature into the document after it has been scanned

To use this feature you must scan your signature and load it using the command ***Choose your signature image.*** A password must be defined for the user to ensure that only the correct user has access to their signature. Every user can predefine three signatures, for example, a normal signature, initials and a legible signature. For all three signatures the password must be identical, as only one password is requested for the user who sets the signature as an annotation. If a password is already stored, the button with the number will change to bold.

When a signature is added to the document, it is embedded within the image. To add a signature to a document, use the ***Signature annotation***.

To set a signature, the password must be entered.

Configure Electronic Signature

You can add a signature using a Signature pad that can be used within the Process Management to authenticate process steps taken. For example, a process can be defined where a document is approved by using a signature. This step of the process is only complete if the signature is valid.

Select Pad Type

Efalia ECM supports a variety of signature pads and Wintab, which is a link to many digitizers. Prior to selecting the pad, you must ensure that the pad is connected and that all drivers are correctly installed. Please refer to the manufacturer Installation guide for instructions on how to do this.

Setup Signatures

The WinClient needs three stored samples of your signature for recognition. These must be stored by the user.

To add your signature, click on the Redo button next to the first signature box, and a window will be displayed where the signature written on the pad will be displayed. Once Ok is pressed, the second signature can be added, and then the third signature.

The signature can be tested by clicking on ***Test signature***. Upon entering your signature again, it will be compared with the three samples. If green buttons appear next to the sample boxes, the signature was recognized correctly.

If red buttons appear, the recognition did not work. If this is the case, the signatures may be too different and should be repeated

```
<add key="FDServer.SignatureThreshold" value="80" />
```

Note

The sensitivity for the signature recognition can be set in the web.config file of the Efalia ECM Server. An administrator must modify this.

Please refer to the installation manual for further details on the settings of the configuration file.

Deleting Signatures

Signature configurations can be repeated at any time by redoing the sample signatures. A signature may only be deleted by an Efalia ECM administrator from within Enterprise Manager.

Local Cache

For each WinClient user a separate cache is created on the workstation where local documents and copies of the documents recently displayed are stored. Each user can specify if the copies of the recently displayed documents are kept, when closing WinClient.

Document storage cache (Cache Directory)

The storage location for the local cache is displayed. Normally the cache is located in a ***FileDirector*** folder within ***My Documents***.

The cache path setting can only be viewed here. The location is, by default, determined by Windows settings. This can be overridden by a server profile, which can be configured by an Efalia ECM administrator, and is described in the Efalia ECM Installation Guide.

Important

Microsoft OneDrive or similar storage locations cannot be used for the local cache.

Purge Cache after program exit / logout

When this option is active, all copies of the recently displayed documents are deleted when the WinClient is closed or the user logs off. If the WinClient is left open for extended periods, after 12 hours the cache is automatically deleted to prevent large amounts of data being accumulated.

MRU Lists

With Most Recently Used (MRU) lists, search entries that have previously been used are listed. Using these, you can reuse the search criteria without having to retype it. The list can be opened with ***ALT*** ⇩. Using the mouse, the drop down list can be viewed by clicking the arrow on the right side of the index field.

Deactivate MRU lists

With this option selected, search criteria will not be saved, and the MRU list will be unavailable.

Clear MRU list

The MRU list keeps up to 32 entries. As soon as the list is full the last entries will be overwritten automatically. If you want to delete MRU-list, select *Start ⇨ Options ⇨ Cache ⇨ Clear MRU-List*.

Connection

The Connection tab determines which Efalia ECM servers the WinClient can connect to, and the basic login settings for each server. Multiple connections can be established to different servers, although a single connection to an Efalia ECM server is standard. Any connection setting changes will be applied to the WinClient when it is next started.

When installing the WinClient on a workstation from the Efalia ECM Server the connection is configured automatically. The settings are the sever address (URL), the connection mode and the language of the WinClient desktop and menus.

If the Connection window appears when starting WinClient, ask your system administrator for the address of the Efalia ECM server and enter the URL of the server. Once the connection settings are entered once they are stored in the local Cache of WinClient.

Change Password

When using an account belonging to an Efalia ECM built-in sub-domain, a user can change their password by clicking on the ***Change password*** icon on the ***Connection*** tab. The new password must be entered twice for verification.

Windows account users cannot change their password using this feature.

Edit Connection

Server URL

Selecting Edit Connections will display the connection configuration window. This setting holds the location of the Efalia ECM server.

The URL format is: http://server name/FDinstallation name

Where:

server name denotes the server name in the network that Efalia ECM is installed. This can be an n actual server name, an IP address, or a domain address, depending upon the server configuration.

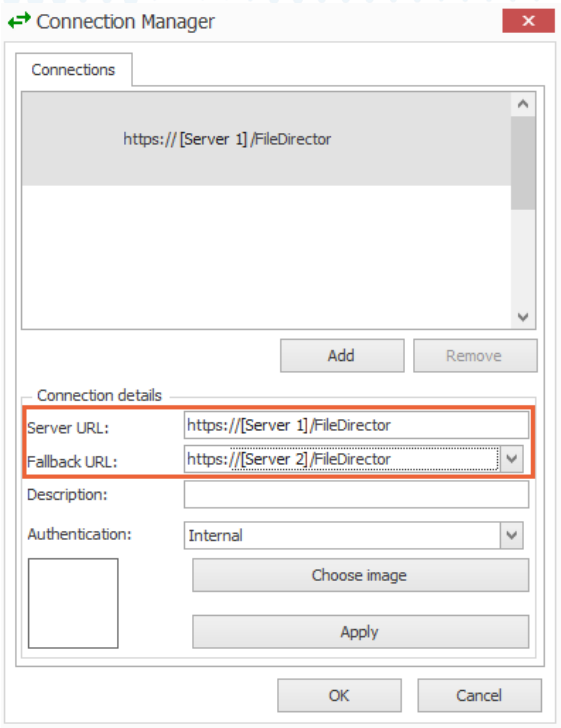
FDInstallation name is the name of the virtual directory of the Efalia ECM Server installation (default: = ***FileDirector***).

Fallback URL

A secondary server connection can be set-up, in case the connection to the primary server cannot be established, the WinClient will attempt to connect to the secondary server.

Only connections that have been previously configured will be available for selection.

Example



Description

A description can be applied to identify the server being connected to.

Automatically Log-In

You can specify if you want to log in to the Efalia ECM using the current windows account or if you want to specify a user name and password each time the WinClient is started.

By default the login should be automatic, using the current Windows account. In this case each local cache is assigned to the relevant user and is only accessible to that user. Which setting should be used in your environment is specific to the environment requirements and must be configured by an administrator.

To change this setting click ***Automatically log-in using current windows account*** in order to switch this setting on or off.

When the setting is turned off and more than one Efalia ECM server connection is set-up, the Log-in window shows a drop down menu to select the server you want to connect to including the description of the connection.

Setup Image

An image can be displayed to visually mark the connections. This can help with identification, especially when dealing with multiple connections. The image has to be a bmp file.

Test Connection

The connection settings can be tested by selecting Test Connection. If the connection was successful, a success message will be displayed.

High Availability Scenario

Efalia ECM WinClient can be configured for a high availability scenario.

For this case, the WinClient is set-up with a ***Server URL*** and the ***Fallback URL*** within the ***Connection Manager***.

Also see: Fallback URL.

WinClient Plug-Ins

Plug-ins are additional features which can be added to the WinClient to perform specific functions that are not part of the standard WinClient, and that are not required by every installation, or workstation within an installation. Customized functions can also be developed to make the system more versatile for specific business requirements.

Installation of Plug-ins

The plug-ins are located on the Efalia ECM installation CD in the directory ***plug-ins***. To install, these files have to be copied into the plug-ins directory of the WinClient application directory:

C:\Program files\Efalia GmbH\Efalia ECM WinClient\PlugIns

Enable Plug-ins Toolbar

To use the plug-ins after installation, the features may need to be added to the toolbar. This can be done with the customization menu. If the user does not have rights to change the menu's the administrator must activate the plug-ins with the Client Configuration in Efalia ECM Enterprise Manager.

Requirements for OCR Plug-in

Since this plug-in performs OCR recognition, Component services and the OCR engine must be installed on the server. Note that for OCR a licence is required, this function is only available if the workstation is connected to the server.

Plug-in Manager



Using the Plug-in manager, the installed plugins can be enabled or disabled. When disabled, they will not be available on the toolbar.

To open the manager, click on the toolbar icon. The installed plug-ins will be listed, with a tickbox beside each plug-in name showing whether it is enabled or not. When the box is ticked, the plug-in is enabled, and will be available on the toolbar.

You can enable or disable any of the listed plug-ins. Once changes have been made, press the ***OK*** button to save them. If any changes have been made you will be prompted to restart the WinClient for the changes to take effect.

Note

You may not have permissions to change the plug-ins settings, as these may have been configured by an administrator using Client Configuration. If this is the case, any plug-ins must be enabled or disabled by and administrator using Enterprise Manager.

Dual Search



The ***Dual Search*** plug-in gives the WinClient user the option to retrieve all documents with a field with the same value, by entering a known unique value of another field.

For example, the user knows the invoice number for a specific customer but needs all documents for this customer. Using this plug-in, the user can search for the invoice number and the WinClient shows all documents which contains the same customer number as the one with the invoice number entered above.

The configuration of Dual Search is done through the xml file of the plug-in. The default path for the xml file is:

C:\Program Files\Efalia GmbH\Efalia ECM WinClient\PlugIns\DualSearch

XML File Contents:

```
<?xml version="1.0" encoding="utf-8"?>
<Configuration>
 <Settings key="Title" value="Perform Dual Search" />
 <Settings key="UniqueFieldID" value="E8AB566D" />
 <Settings key="GroupingFieldID" value="F0FCEF9F" />
 <Settings key="ShowDocument" value="True" />
</Configuration>
```

Title

Contains the name of the plug-in.

UniqueFieldID

The ID of the appropriate field is entered. This could be the invoice number.

GroupingFieldID

The ID of the field containing the common value for the documents is entered; this could be the customer number.

ShowDocument

This determines whether the document is retrieved and displayed.

Note

The ID of a field is shown in the properties window of a field in Enterprise Manager.

Interactive Search

The WinClient PlugIn Interactive Extended Search is designed to speed up search operations in Efalia ECM WinClient.

The focus here is on searches across multiple document types based on the result of a previous search, without having to clear the unnecessary fields manually or using the ***Clear fields*** function and having to re-enter the field value.

Installation

The PlugIn has to be copied into the ***PlugIns*** folder of the Efalia ECM WinClient.

Default path:

C:\Program Files (x86)\Efalia GmbH\Efalia ECM WinClient\PlugIns

Default path with installed plug-in:

C:\Program Files (x86)\Efalia GmbH\Efalia ECM WinClient\PlugIns\InteractiveSearch

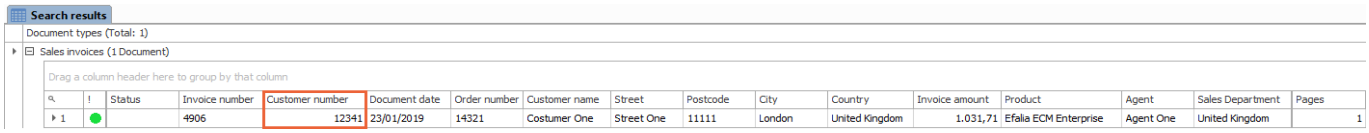
Running an Interactive Search

The plug-in can be run from all areas (***Search***, ***Edit*** and ***Scan***) of the control panel.

The prerequisite is that the field that was selected before searching, using ***Interactive Search*** plug-in, is not empty.

Example

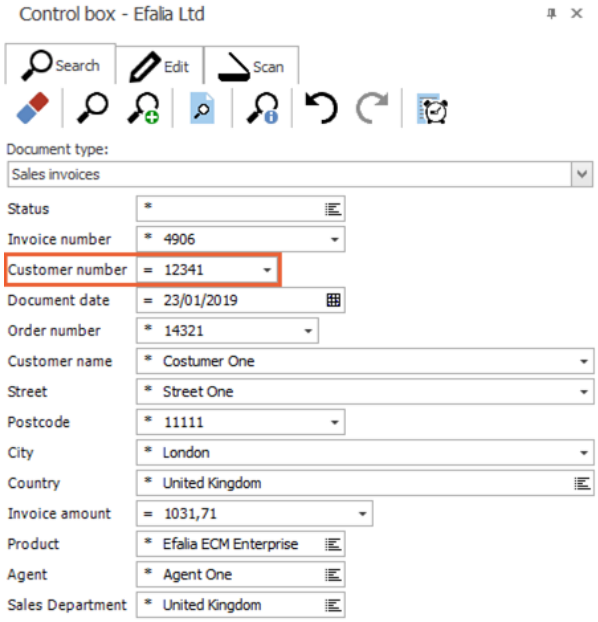
In the example below, a member of the sales team wants to check the communication and documents of other teams with a customer, after the retrieval of an archived invoice.



In this example, the ***Interactive Extended Search*** is based on the ***Customer number***.

Without the plug-in it would be necessary to clear the fields, re-enter the customer number ***12341*** and run an ***Extended search***.

With the plug-in, any field value displayed in a field within the ***Control box*** can be used to run a follow-up search.



After the value has been selected within the ***Control box***, the plug-in can be run.

The result in this example shows that there has been communication with the respective customer, stored in the document type ***Customer communication***.



Clear UI



This plug-in is a useful little helper if the user interface of Efalia ECM WinClient needs to be reset.

After selecting the plug-in, all index fields are cleared and all opened documents are closed. The lists are also closed, except the list ***Local documents***.

Note

Checked-out documents are not automatically checked-in by the plug-in.

OCR-Calculator



The OCR Calculator can add units and prices. If this information is listed on an invoice, the information can be read by OCR and listed in a calculation table.

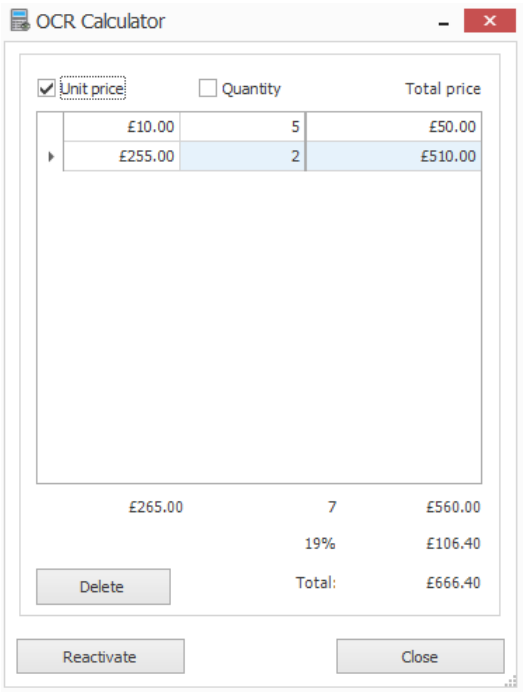
The applicable VAT value can be set within the corresponding configuration file.

DSDMS.FileDirector.WinCPlugIn.OCRCalculator.xml

```
<?xml version="1.0" encoding="utf-8"?>
  <configuration>
    <appSettings>
      <add key="MwSt" value="19" />
    </appSettings>
  </configuration>
```

Adding of units and prices

For the OCR calculator, scanned documents which list units and prices in columns are required. Select the document to be read and display it. Select the OCR Calculator plug-in and drag a zone around the listed units and prices. A window appears where the units and prices are listed in a grid. The entries can be modified for a quick calculation.



CallTo – Reading Phone Numbers



The CallTo plug-in also works with OCR recognition functionalities. This plug-in reads telephone numbers from a document and filters the reading result in order to obtain a valid telephone number.

The filtered telephone number does not contain hyphens or other formatting characters, so that this number can automatically be passed to a defined application using the ***callto://*** - windows function.

Default Country Code Setting

The default country code needs to be set within the XML file of the CallTo plug-in. This is found in the CallTo plug-in directory.

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>
        <add key="CountryPrefix" value="+44" />
  </appSettings>
</configuration>
```

If a standard country code is assigned during recognition, this can be specified in the XML file of this plug-in. If **+** or ***00*** is recognized at the beginning of the number, the default country code is not used.

HitListDocumentExport



This plug-in can be used to export documents, with their index information. It creates an export file from the selected documents, which can be imported by the WinClient or other third-party applications.

Select the documents to be exported, and then select the plug-in. A field separator must be defined which is used within the export file. Select ***Export*** and then select the target folder for the documents to be exported to.

A subfolder named with the Cabinet ID is created in the selected folder. The documents are written as subfolders named using the document ID. An index file with suffix .dat is also created, which contains the index data listed with the relevant TIFF files:

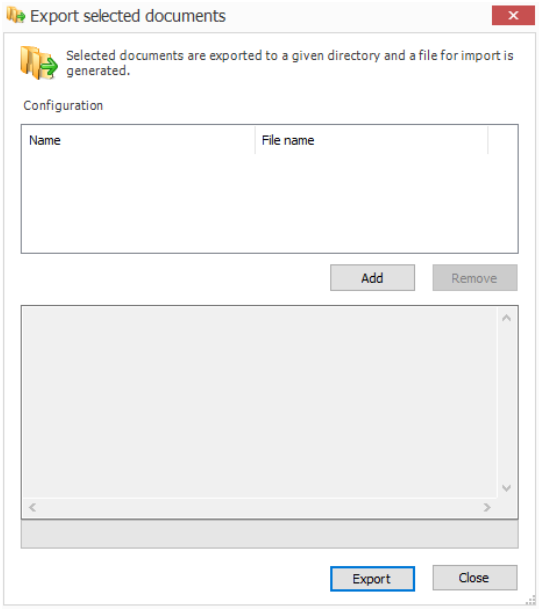
Note

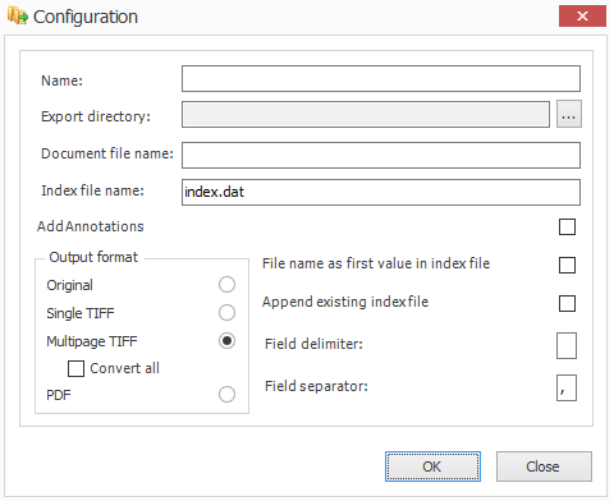
This plug-in exports the newest version of a document without revisions and annotations.

Export Documents



The plug-in allows to create and save different export configurations.





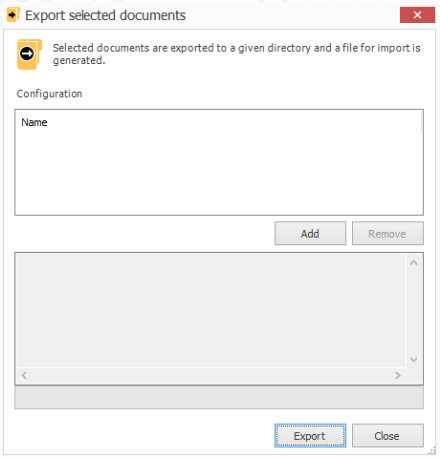
A full configuration contains:

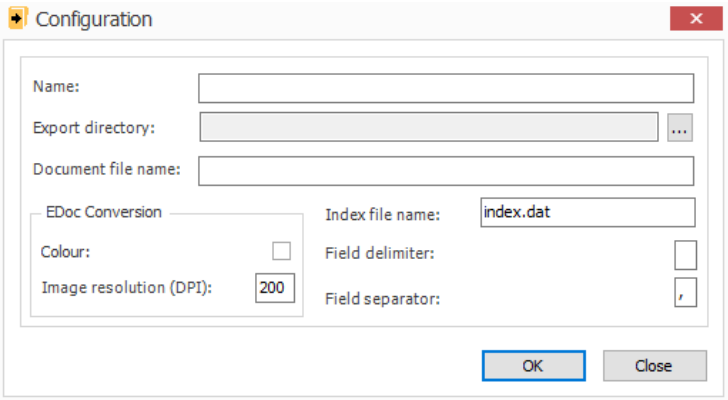
- A target directory
- File name prefixes for the index file and the exported pages
- Embedding of annotations
- Export format (original, single pages, multi-page TIF, PDF)
- Field separator and field delimiter of the index file
- Append option for the index file
- Whether the file name is the first index in the index file

The different configurations are stored in a list and can be selected for export.

Tiff Export

The plug-in allows to create and save different export configurations.





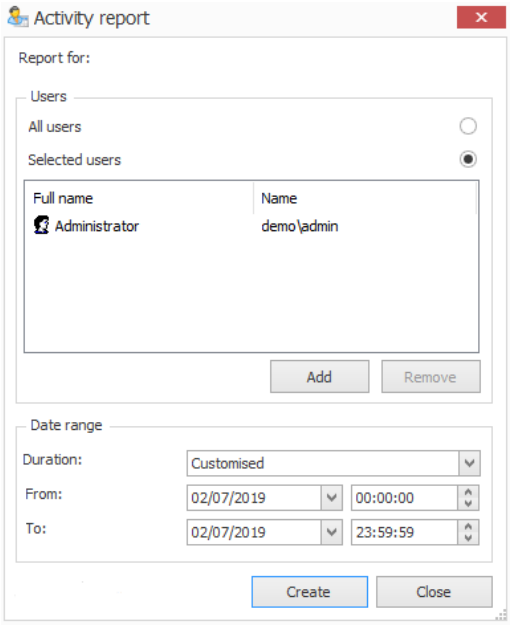
A full configuration contains:

- A target directory
- File name prefixes for the index file and the exported pages
- The export format for electronic documents (colour/black&white, resolution)
- Field separator and field delimiter of the index files

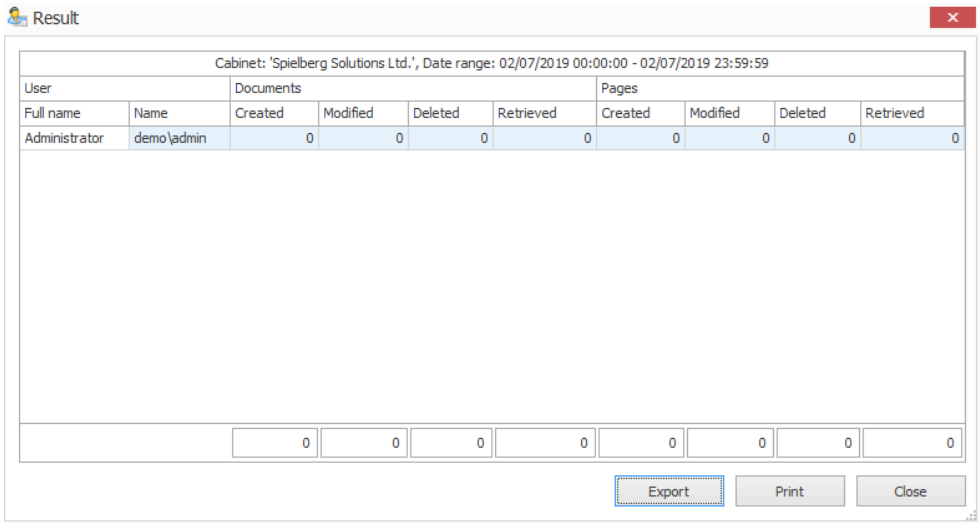
The user can select an entry from the configuration list to export the selected documents with the defined settings.

Activity report

The plug-in creates a summary for each user showing the number of files and pages created, modified, deleted and retrieved for the selected date.

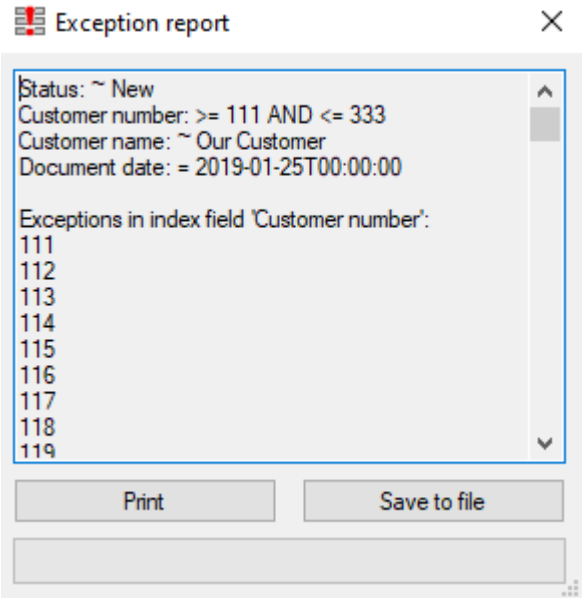


The resulting report can be exported or printed.



Exception report

The ***Exception report*** plug-in allows you to do a search through a numbers field in a document type for any gaps or double entries in a numbering sequence.



Once you have set the field to ***range search*** and entered the information, press the ***Exception report*** plug-in button to perform the range check for missing values.

The result can be printed or saved to file.

ResponseWriter

Response Writer is used to assist in creating Microsoft Word or Excel documents with prefilled fields taken from Efalia ECM. It also allows using index field values of one or more connected document types.

As an example, you may wish to query an invoice received from a supplier. By using ResponseWriter, the supplier name, address and invoice information can be added to a word document, via a Word template that has the fields specified that ResponseWriter will link to.

Installation

Copy the plug-in to the WinClient PlugIns folder. The folder will contain the XML-file DSDMS.FileDirector.WinCPlugIn.ResponseWriter.xml which must be edited for an individual configuration.

Default path:

C:\Progam Files (x86)\Efalia GmbH\Efalia ECM WinClient\PlugIns\

ResponseWriter\DSDMS.ResponseWriter.xml

DSDMS.ResponseWriter.xml

Element	Description
<Cabinet ID="XXXXXXXX">	Mandatory Optional: multiple entries for different cabinets
<Settings key="TemplatePath" value="c:\template path\" />:	Optional. Default template path. Prefix for section ***<TemplateFile>.***
<Settings key="ReplaceInDocumentHeader" value="False" />	Optional Enables search and replace for variables set in document header Allowed values: ***True***/***False***
<Settings key="ReplaceInDocumentFooter" value="False" />	Optional Enables search and replace for variables set in document footer Allowed values: ***True***/***False***
<Settings key="ReplaceInDocumentBody" value="False" />	Optional Enables search and replace for variables set in document body Allowed values: ***True***/***False***
<Settings key="ReplaceFormFields" value="True" />	Optional Enables search and replace for variables set in Word form fields Allowed values: ***True***/***False***
<Settings key="AppendDocument" value="True" />	Appends the ResponseWriter document to an existing document Allowed values: ***True***/***False***
<Settings key="ImagePrinter" value="FileDirector ImagePrinter" />	Prints the ResponseWriter Document on an existing FileDirector ImagePrinter The ResponseWriter Word or Excel document is printed as an image file.

Element	Description
<Settings key="IndexSource" value="False" />	Optional Default value = ***True*** FD_XXXXXXXX variables within the template are replaced by values of the corresponding FileDirector fields‹› must not be used for variables in Word form fields Must be set to False if either the option ***MemoSourceFieldID*** or Mapping is used
<Settings key="MemoSourceFieldID" value="XXXXXXXX" />	Optional Allows using replacement values from memo field containing xml data
<Settings key="ConnFieldID" value="XXXXXXXX" />	Optional Enables the use of field values out of different document types within a cabinet. The set field must exist in all document types used for the ResponseWriter template
<TemplateSelection FieldID="XXXXXXXX">	Optional Allows to open specific Response Writer documents according to different field values.
<TemplateFile FieldValue="Template1" FileName="ResponseWriter1.doc" />	Optional Allows multiple entries for different template definitions
<DetailsDocType ID="XXXXXXX">	Optional Multiple sections for different document types allowed Allowed values: field ID without Prefix „***FD_***“. The document type used must contain the field given in ***ConnFieldID***
<ShowDetailColumns FieldID="XXXXXXXX" />	Optional Multiple lines for different fields allowed If more than one document in the details document type share the same value in the field defined by "***ConnFieldID***" (above) you will see a selection form showing the defined columns. If no ***<ShowDetailColumns>*** are defined all columns are shown
<Mapping FieldID="FFFFFFFF" Name="Field1" />	Optional Multiple entries for different fields allowed Maps an index field to a variable that will be replaced

Example

In this example, one Efalia ECM document type contains all relevant index information.

Orders
Customer number
Order date
Name
Address
…etc.

A query needs to be generated because the ordered product is out of stock and a replacement product should be offered to the customer. The needed index information for the query template is all stored in the document type Orders. By selecting the order and selecting the Response Writer plug-in, all index values as order number, address details and ordered product can be passed to a defined Microsoft Word template.

Installation

Copy the plug-in to the WinClient plug-ins folder. The folder will contain the XML-file DSDMS FileDirector ResponseWriter.xml which must be edited for the correct configuration.

Configuration

You will need the Cabinet ID and, if necessary, the field IDs for the mapping of field IDs and the variables used in the template.

Note

The IDs of document types and fields can be displayed at once quite simple in Efalia ECM Enterprise Manager by using the feature **Runtime Column Customization**. Simply add the column ID to the tabular view.Checked-out documents are not automatically checked-in by the plug-in.

Open the configuration file

DSDMS.ResponseWriter.xml

and fill in the appropriate values:

```
<?xml version="1.0" encoding="utf-8"?>
<Configuration>
  <Cabinet ID="C7F8F218">
    <Settings key="TemplatePath" value="C:\Program Files\Efalia GmbH\Efalia ECM WinClient\PlugIns\ResponseWriter\Templates\" />
    <Settings key="ReplaceInDocumentHeader" value="False" />
    <Settings key="ReplaceInDocumentFooter" value="False" />
    <Settings key="ReplaceInDocumentBody" value="True" />
    <Settings key="ReplaceFormFields" value="True" />
    <Settings key="AppendDocument" value="True" />
    <!-- <Settings key="ImagePrinter" value="FileDirector ImagePrinter" /> -->
    <Settings key="NewDocument" value="False" />

     <Settings key="IndexSource" value="True" />

    <Mappings>
      <Mapping FieldID="F71983C8" Name="Title" />
      <!-- <Mapping FieldID="F94F2366" Name="Name" /> -->
```

```
    <!-- <Mapping FieldID="27C5D77E" Name="Company" /> -->
    <!-- <Mapping FieldID="42DF3601" Name="Shipping street" /> -->
    <!-- <Mapping FieldID="07BCF5BB" Name="Shipping postcode" /> -->
    <!-- <Mapping FieldID="D64A2D30" Name="Shipping city" /> -->
    <!-- <Mapping FieldID="981817DE" Name="Shipping country" /> -->
  </Mappings>
 </Cabinet>
</Configuration>
```

Note

Within the file shown above as example a few lines are set inactive. Inactive lines begin with <!-- and ends with --->.

The following <tags> must be filled in the file:

Tag	Description
Cabinet ID	The unique ID of the Cabinet
TemplatePath	Path for the templates

The following <tags> are optional in the file:

Tag	Description
Mapping FieldID	Mapping of Efalia ECM IDs and the unique ID of the Cabinet

The mapping fields are fields whose contents are filled into the correspondence, extracted from the document type. Either fill in the ID in this way «FD_27C5D77E» or the definition which has been set as the name of the field: «Company».

Template selection

A template can either be selected manually or by a specific value of a defined Efalia ECM field.

The selection by field value needs some configuration in the XML configuration file in the section ***</TemplateSelection>***.

Example

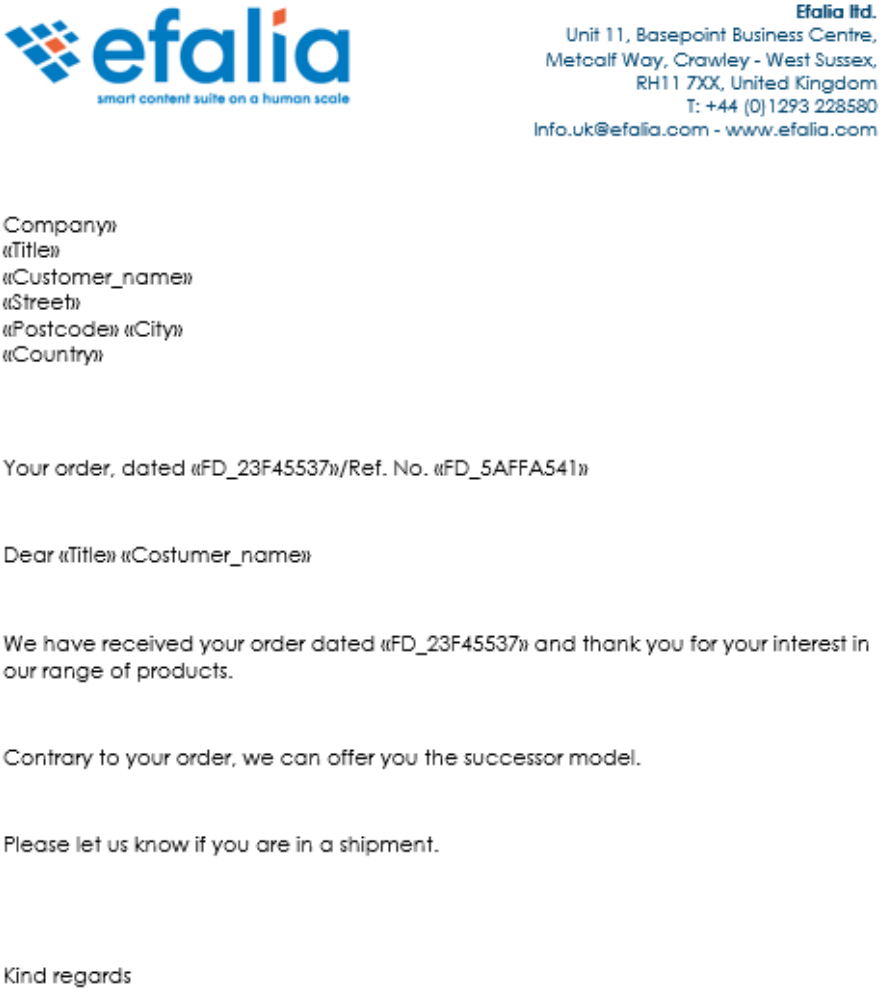
For this, a mapping must be set up in the section.

```
<TemplateFile FieldValue="Template1" FileName="ResponseWriter1.doc" />
```

Example

Template Example 1

Find an example for a mapping of fields in a Response Writer Word template below:



efalia
smart content suite on a human scale

Efalia ltd.
Unit 11, Basepoint Business Centre,
Metcalf Way, Crawley - West Sussex,
RH11 7XX, United Kingdom
T: +44 (0)1293 228580
Info.uk@efalia.com - www.efalia.com

Company»
«Title»
«Customer_name»
«Street»
«Postcode» «City»
«Country»

Your order, dated «FD_23F45537»/Ref. No. «FD_5AFFA541»

Dear «Title» «Costumer_name»

We have received your order dated «FD_23F45537» and thank you for your interest in our range of products.

Contrary to your order, we can offer you the successor model.

Please let us know if you are in a shipment.

Kind regards

In this example, the first Efalia ECM document type contains all relevant customer data as customer number, customer name and invoice address. The second document type contains the chosen delivery address. The connecting field is ***customer number***.

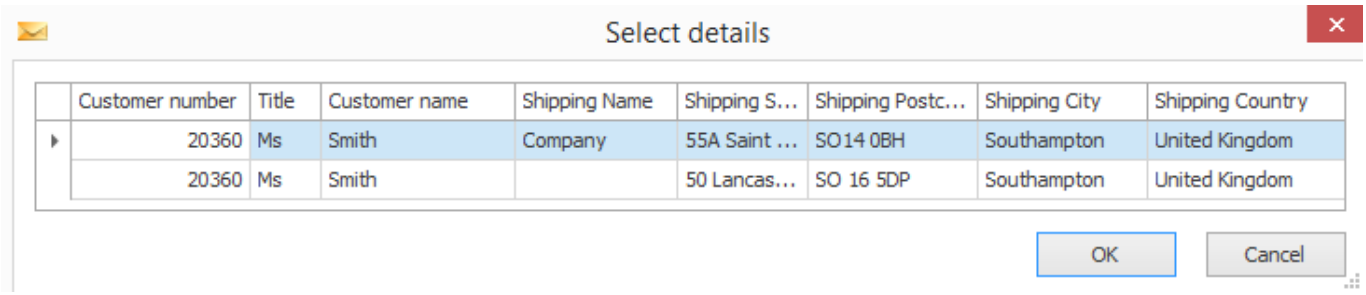
Note

The example above shows a mixture of field mapping and field IDs.

Sales invoice	Orders
Customer number	Customer number
Invoice date	Order date
…etc.	Delivery address
	…etc.

A shipping confirmation needs to be generated. The needed index information for the shipping confirmation is stored in two different document types. The information stored in the document type Sales invoices is complemented by delivery address information stored in Orders. The needed information from both document types is passed to Microsoft Word and filled into a defined Word template.

In case there are several orders connected to the customer number 20360 the user is asked to select the proper information for the Response Writer document.



The example given has two contact entries for customer number 20360. The correct contact can be selected. You can then choose the Microsoft Word template to be used, which will open a new Word document, and fill the fields configured within the XML file

Configuration

The needed cabinet ID, both document type IDs and the field IDs of the relevant fields can be determined in Efalia ECM Enterprise Manager.

Note

The IDs of document types and fields can be displayed at once quite simple in Efalia ECM Enterprise Manager by using the feature **Runtime Column Customization**. Simply add the column ID to the tabular view.

Open the configuration file

DSDMS.ResponseWriter.xml

and fill in the appropriate values:

```
<?xml version="1.0" encoding="utf-8"?>
<Configuration>
  <Cabinet ID="C7F8F218">
    <Settings key="ConnFieldID" value="EC533B33" />
    <Settings key="TemplatePath" value="C:\Program Files\Efalia GmbH\Efalia ECM WinClient\PlugIns\ResponseWriter\Templates\" />
    <Settings key="ReplaceInDocumentHeader" value="False" />
    <Settings key="ReplaceInDocumentFooter" value="False" />
    <Settings key="ReplaceInDocumentBody" value="True" />
    <Settings key="ReplaceFormFields" value="True" />
    <Settings key="AppendDocument" value="True" />
    <!-- <Settings key="ImagePrinter" value="FileDirector ImagePrinter" /> -->
    <Settings key="NewDocument" value="False" />

     <Settings key="IndexSource" value="True" />
```

```
    <Mappings>
      <Mapping FieldID="F71983C8" Name="Title" />
      <Mapping FieldID="F94F2366" Name="Customer_name" />
      <Mapping FieldID="27C5D77E" Name="Company" />
      <Mapping FieldID="F9A4D2F1" Name="Street" />
      <Mapping FieldID="0D5D4F6C" Name="Postcode" />
      <Mapping FieldID="75369A82" Name="City" />
      <Mapping FieldID="A8D4A54D" Name="Country" />
    </Mappings>

    <DetailsDocType ID="dccf67cb">
      <ShowDetailColumns FieldID="EC533B33" />
      <ShowDetailColumns FieldID="F71983C8" />
      <ShowDetailColumns FieldID="F94F2366" />
      <ShowDetailColumns FieldID="27C5D77E" />
      <ShowDetailColumns FieldID="42DF3601" />
      <ShowDetailColumns FieldID="07BCF5BB" />
      <ShowDetailColumns FieldID="D64A2D30" />
      <ShowDetailColumns FieldID="981817DE" />
      <Mapping FieldID="EC533B33" Name="Customer number" />
      <Mapping FieldID="F71983C8" Name="Title" />
      <Mapping FieldID="F94F2366" Name="Name" />
      <Mapping FieldID="27C5D77E" Name="Shipping_company" />
      <Mapping FieldID="42DF3601" Name="Shipping_street" />
      <Mapping FieldID="07BCF5BB" Name="Shipping_postcode" />
      <Mapping FieldID="D64A2D30" Name="Shipping_city" />
      <Mapping FieldID="981817DE" Name="Shipping_country" />
     </DetailsDocType>
    </Cabinet>
</Configuration>
```

Note

Within the file shown above as example a few lines are set inactive. Inactive lines begin with <!- -- and ends with --->.

The following <tags> must be filled in the file:

Tag	Description
Cabinet ID	The unique ID of a cabinet
ConnFieldID	Unique field ID of the comprehensive field for the document types used in section <DetailsDocType ID>
TemplatePath	Path of the Response Writer templates
DetailsDocType ID	Unique document type ID of the document type containing further index information, needed for the creation of Response Writer documents. Also a corresponding mapping can be set-up.

The following <tags> are optional in the file:

Tag	Description
Mapping FieldID	Mapping of Efalia ECM IDs and The unique ID of the Cabinet
ShowDetailColumns	Fields for the listing displayed in "Select details" window. That window appears only when several identical entries of a value in the ConnFieldID exist. In case no settings for ShowDetailColumns, the window shows all fields of the document type.

The mapping fields are fields whose contents are filled into the correspondence, extracted from the document type. Either fill in the ID in this way «FD_F94F2366» or the definition which has been set as the name of the field: «Name».

Template selection

A template can either be selected manually or by a specific value of a defined Efalia ECM field.

The selection by field value needs some configuration in the XML configuration file in the section ***</TemplateSelection>***.

Example

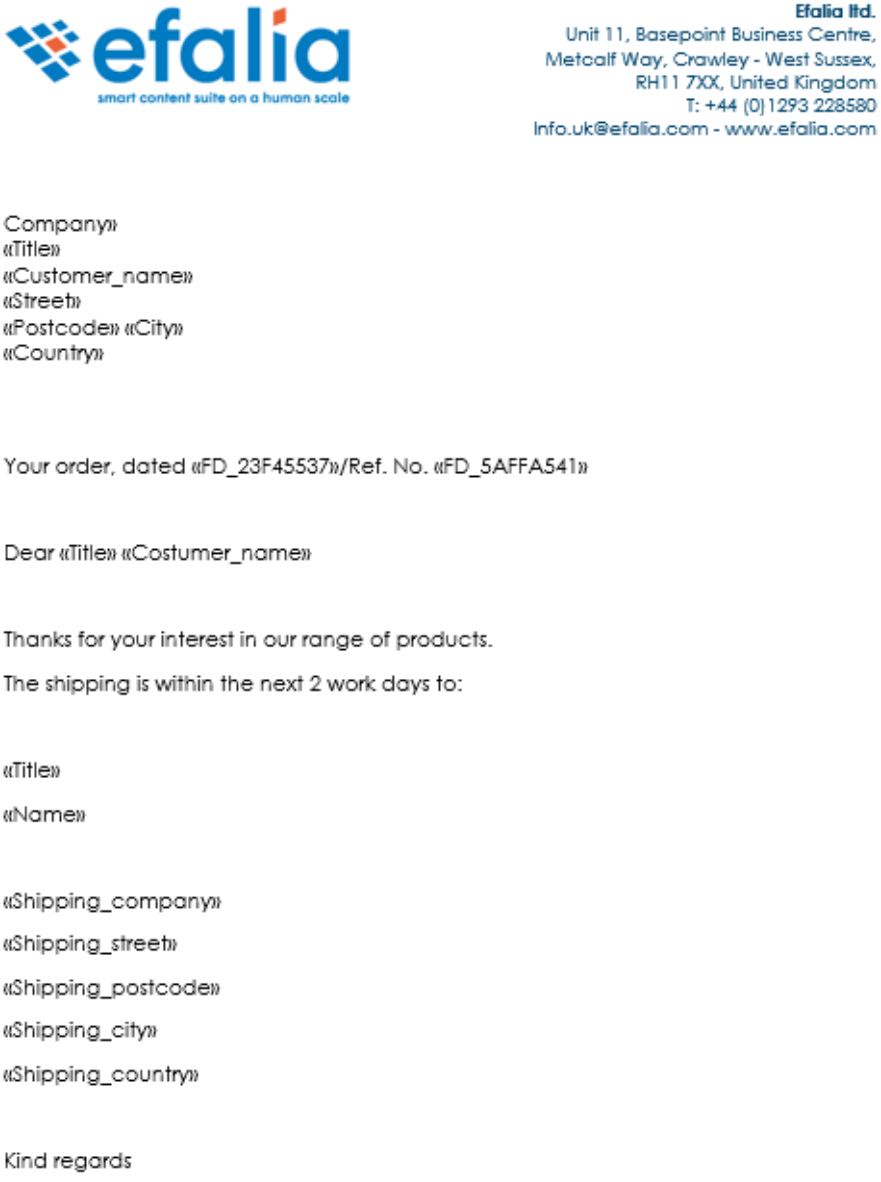
For this, a mapping must be set up in the section.

```
<TemplateFile FieldValue="Template1" FileName="ResponseWriter1.doc" />
```

Example

Template Example 2

Find an example for a mapping of fields in a Response Writer Word template below:



efalia
smart content suite on a human scale

Efalia ltd.
Unit 11, Basepoint Business Centre,
Metcalf Way, Crawley - West Sussex,
RH11 7XX, United Kingdom
T: +44 (0)1293 228580
Info.uk@efalia.com - www.efalia.com

Company»
«Title»
«Customer_name»
«Street»
«Postcode» «City»
«Country»

Your order, dated «FD_23F45537»/Ref. No. «FD_5AFFA541»

Dear «Title» «Costumer_name»

Thanks for your interest in our range of products.

The shipping is within the next 2 work days to:

«Title»

«Name»

«Shipping_company»

«Shipping_street»

«Shipping_postcode»

«Shipping_city»

«Shipping_country»

Kind regards

Note

The example above shows a mixture of field mapping and field IDs.

The XML configuration file contains a mapping for the field value stored in field Street.

Section of the XML configuration file:

```
<Mapping FieldID="F9A4D2F1" Name="Street" />
```

Section of Efalia ECM Enterprise Manager:

F9A4D2F1	Street	30	Any character

The XML configuration file contains no mapping for the field value stored in field Street.

Section of Efalia ECM Enterprise Manager:

23F45537	Document date	10	Date

Retrieval Media

Documents, with their associated index data can be exported from Efalia ECM to other media, together with a Retrieval application that allows the documents to be displayed, along with their index data. This data can be viewed for retrieval without using an Efalia ECM Server. The special retrieval client is available for this. This is a very easy way to provide data for retrieval from an Efalia ECM Server to somebody who has no access to an Efalia ECM infrastructure.

Requirements

A Retrieval ticker is required to create a retrieval CD or DVD. These tickers can be purchased in blocks and they are stored in the Efalia ECM program licence. Any number of documents can be exported and added to an assembly of data. If the required data has all been collected, this collection must be licenced with a ticker. Only when this ticker licencing has been performed, can the data be processed by the retrieval software.

A licenced CD or DVD can be copied without limitation or without requiring new tickers. If data is amended within an existing licenced collection, a new ticker is required.

If a collection of documents needs more space than is available on the relevant disk (CD or DVD), the data is divided into several directories. These directories can be opened by the retrieval client as separate Cabinets. For each directory a ticker is required.

Note

In order to purchase tickers please contact your Efalia ECM reseller.

Create a Retrieval CD/DVD

If you want to export documents to retrieval media, select the documents to be exported and choose ***File*** ⇨ ***Export*** ⇨ ***Retrieval CD/DVD***.

If documents from different document types should be exported, they can be assembled step by step without having to licence it after exporting. It is possible to create a document list containing more documents than the currently set maximum number of displayed documents.

A number of documents can be added to an exported Cabinet at any time. If the exported Cabinet is already licenced with a ticker, a new ticker will be required. When it has not been licenced by a ticker yet, any number of documents can be added and a ticker is needed for licencing only on completion.

Once the documents to be exported have been selected, select ***File*** ⇨ ***Export*** ⇨ ***Retrieval CD/DVD***, and the ***Export to CD/DVD*** window will open.

Note

The maximum number of documents that can be displayed on a document list is set on the server. An administrator can specify the maximum number of documents to be listed on a document list.

Target Folder

The exported data is stored in the target folder. A subfolder with the Cabinet ID as the name is created. A file CABINETS.XML is created, which is used by the retrieval client. A licence file and other XML files are created, that describe the contents of the Cabinet.

Include revisions / history

If revisions should be exported, this option can be selected. Please note that the user exporting the data will need rights too display revisions, otherwise the data cannot be exported correctly.

Include fulltext

Any information generated as a result of full text OCR being performed on the documents can be included in the export, and subsequently used for document searches within the Retrieval software

New target folder after:

The size of the target directory is specified. The size of the XML files is taken into account during calculation of the estimated necessary size.

Please note to reserve some space on the export disc, if the retrieval client software is also to be copied to the media.

General information

The company name and the name of the user exporting the data can be set.

Certificate

When using a certificate the export can be performed with an electronic signature.

In order to use this feature, certificate services must be available in the domain (Public Key Infrastructure - PKI). A signature ensures that the exported data is created from a trusted source.

Media ID

Each new retrieval media carries a unique number, the media ID. Using this, a disc can be identified as the original one. The previous, actual and next media ID can be specified here.

Licence Retrieval

This option puts a licence file to the exported Cabinet data. If the exported data collection is bigger than the space specified, a new subdirectory is created with a new Cabinet directory. For each directory a ticker is used for licensing.

Exports of ***23000MB or larger*** uses ***4 tickers*** for licensing.

Start

Efalia ECM does not contain or control CD/DVD software, the exported data cannot be written directly to CD/DVD. Data is always written to an export path, which should not exceed the space available on the media to be written. The exported data must be licensed; this collection of data can then be written to CD/DVD.

Retrieval Client

The Efalia ECM Retrieval Client is necessary to retrieve the data from a disc. This retrieval client must be available for anyone who needs to use this disc. The retrieval client can either be written to the disc itself or be sent to the users by other means.

Installation

On the Efalia ECM installation CD the retrieval client can be found in the folder ***\Setups\ Efalia ECM Retrieval Setup.msi***.

For installation, log on to the system as an administrator user and execute the *.msi –File. Follow the installation instructions displayed on the screen.

After installation is complete an Efalia ECM Retrieval icon can be found on the desktop. Double clicking this icon will start the retrieval client.

Note

Efalia ECM Retrieval Client can also be installed on a computer with Efalia ECM WinClient installed.

Open Cabinet with Retrieval Client

After the retrieval client is started, a window for opening of a Cabinet appears. Open the Cabinets.xml, which was created during the export. An exported Cabinet can only be opened by the retrieval client if it licenced.

Efalia ECM retrieval client generally is comparable with a limited WinClient, i.e. it has less functions. Descriptions about the functionalities can be taken from the WinClient documentation.

Local Cache

All new scanned, checked out, downloaded and viewed documents are automatically stored in the local cache.

Only the actual displayed pages of a document will be downloaded, so that the time to load is much shorter when working with large documents. When you need to work with documents in off-line mode, the complete document should be downloaded.

Note

The local cache is automatically created; no manual or other changes should be made.

Storage location

By default, the local cache will be located in the folder FileDirector, which is created in the user's ***My Documents*** folder.

Default path:

C:\Users\[Windows-Account]\Documents\FileDirector

The administrator can move this folder to another folder if required.

Important

Microsoft OneDrive or similar storage locations cannot be used for the local cache.

Structure of the local cache

In the FileDirector folder, for every logged-in user, the WinClient settings are written to a folder. Within this folder, Cabinet folders with the ID of the Cabinet will be created for every opened Cabinet. The file docmanager.xml contains a list of the documents.

The documents are saved in subfolders, which contains the revisions and pages.

When more than one server connection has been set-up in Efalia ECM WinClient ***Options***, a folder for each server connection is created above the Efalia ECM user's folder level.

Thus there is a separate section in file system for each server connection set-up.

Example

C:\Users\[Windows Account]\Documents\FileDirector\[Efalia ECM System]\[Efalia ECM Account]\ [Cabinet-ID].CAB\[DocType-ID].FDD\[Revision].REV\Files

Cache is deleted automatically

The setting Purge cache on program exit/log-out, when set will remove any documents which have been viewed, but do not currently appear on the document lists. All local and checked-out documents are not purged. The setting is located in *Extras ⇨ Options ⇨ Cache*

If the cache directory is deleted, when the WinClient next starts, it will be automatically recreated. It may however have lost the connection settings to the Efalia ECM server, so this would have to be reapplied.

General Information

Document Formats

Document Viewer

When Component Service is installed the, Document Viewer is installed to enable Efalia ECM to display different document formats without the need for the corresponding application to be installed.

For information on the formats supported, please refer to the Oracle homepage.

When using formats that are not supported by the viewer or you have trouble displaying these files via the WinClient, the viewer can be switched off for these formats.

WinClient Settings

The Viewer can be disabled for specific document formats, if, for example you wish to utilise the native application to view the document.

To apply this setting to a single client, add an entry to the configuration file ***app.xml*** in the WinClient program folder

The file is stored in the program path of WinClient. ***C:\Program Files\Efalia GmbH\Efalia ECM WinClient***.

In this file app.xml find the following entry:

```
<appSettings>
<add key="NoStellentFor" value=".xml;.htm;.html;.mht" />
</appSettings>
```

Add the formats that are not to be used by the Viewer.

Note

Bear in mind that this setting can be overwritten when the WinClient is updated. If this setting is to be permanent, the setting should be added to the app.xml on the server prior to installation.

Keyboard Shortcuts

All the WinClient commands can be carried out using the mouse or touchpad. There are also many keyboard shortcuts available that you can use to control the WinClient.

These are listed below:

Key	Function
F6	Control box Search
F7	Control box Edit
F8	Control box Scan
Ctrl + F6	Search results
Ctrl + F7	Local Documents
Ctrl + F8	Personal folder
F5	Refresh
Alt ⇩ used in an keyword list type index field of the control box	Drop down of a keyword list
Alt ⇩ used in any non-keyword list type index field of the control box	Drop down of a list of recently used entries (MRU)
⇩	Scrolling through last entries made

Key	Function
Current tab ***Edit***, Filling fields using the ***Return key***.	If the ***Return key*** is pressed after entering the value, you automatically jump to the ***next index field***. If the entry in the ***last index field*** is confirmed with the ***Return key***, the ***Save and next document*** function is activated. If the ***Return key*** is pressed again, the function ***Save and next document*** is executed
Perform search (Ctrl +S)	The search is executed using the index currently entered.
Ctrl + A	Select all
Ctrl + T	Toggle select
Ctrl + R	Remove selection
F12	Toggle to full screen mode

Help menu

WinClient Help

The Help/Contents option of the Help menu will display the WinClient User Guide. This is a PDF so an appropriate reader such as Adobe Acrobat Reader will need to be installed on the workstation.

Repair Local Cache

If an issue has occurred with the local cache, selecting this option will start the cache repair. When the WinClient starts, if a problem is found with the local cache, you will be prompted to run the cache repair.

About

This will display the version number of the WinClient. Also displayed is the Efalia ECM Server type and version, the number of tickers for Retrieval CD/DVD's available, and the version information for the following, if currently installed on the workstation:

Component Service

EDOC Engine

OCR Engine

The time, in days, until the expiry of the Efalia ECM software Assurance is also displayed.

Additional Settings (app.xml)

The WinClient configuration file ***app.xml*** contains keys that can be changed that affect the way that documents and data are displayed, and can also change the way some features work. The keys must be set in the ***<appsettings>*** section of the app.xml.

Note

If a key is removed, the default setting applies.

Default Zoom Mode

Sets the default document zoom mode

<add key="DefaultZoomMode" value="FA" />

Value	Mode
FA	Fit all
FW	Fit width
FO	Original width

Default Display Mode

Sets the default document display and thumbnail mode

<add key="DefaultDisplayMode" value="TI" />

Value	Mode
TI	Thumbnails and Image
T	Thumbnails only
I	Image only
DSTI	Duplex view and thumbnails

Value	Mode
DSI	Duplex view
DTTI	Book mode and thumbnails
DTI	Book mode
TCF	Thumbnail cover flow

Email Link Targets

When using Send to email as link the links to be created can be set using this key. One or both settings can be used.

```
<add key="EMailLinkTargets" value="Web;WinC" />
```

Value	Mode
Web	Create link to show document in Web Server
WinC	Create link to show document in the Windows Client

Cache ODBC Lists

Sets the update routine for ODBC keyword lists

```
<add key="CacheODBCLists" value="true" />
```

Value	Mode
true	The current contents of ODBC keyword lists are retrieved and cached when the Efalia ECM WinClient is started. This is the ***Default*** setting.
false	The current contents of ODBC keyword lists are retrieved when used in Efalia ECM WinClient.

Annotation: OCR Index

The two key below can be used to change the functionality of the annotation OCR Index.

For more information about OCR index, see also: OCR Index.

```
<add key="AttachOCRText" value="false" />
```

Value	Mode
true	Another use of OCR Index in the same field attaches the read value to the existing value. In case no separator is defined in the key ***OCRAttachedTextSeparator*** or the key is missing, the values are separated by a ***Space***.
false	Another use of OCR Index in the same field replaces the previously read and inserted value. This is the ***Default*** setting.

<add key="OCRAttachedTextSeparator" value="" />

Value	Mode
Character to be used as separator	In case no separator is defined in the key ***OCRAttachedTextSeparator***, the values are separated by a ***Space***.