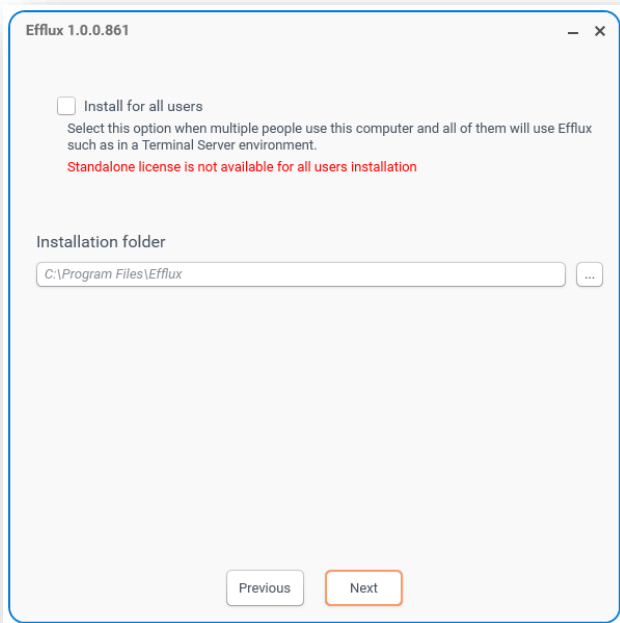


User Guide
Efflux Doc-It
Version 1.0



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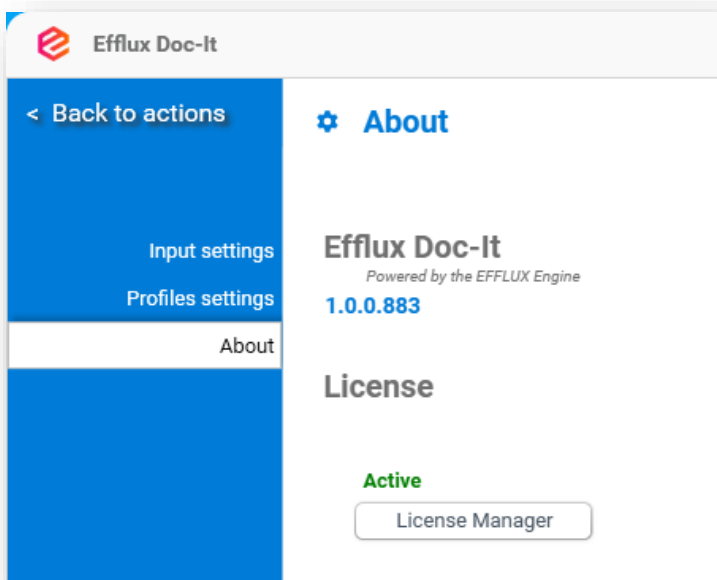
1. Installation / Uninstallation

1.1. Install Efflux Doc-It

Efflux Doc-It offers two modes of installation,

- **Single user mode** – Recommended mode if only one user is using the computer.
- **All users mode** – Recommended mode if more than one user is using the same computer.

! CAUTION: Outlook plugin component will only be available if **Microsoft Outlook** is installed on the machine.

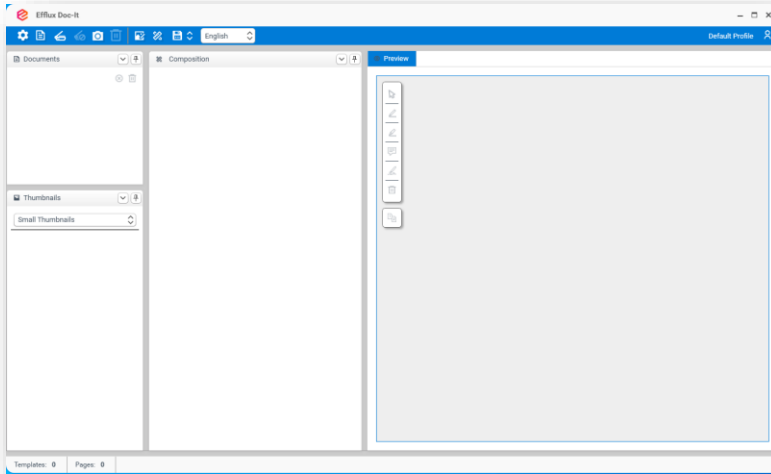


1.2. Uninstall Efflux Doc-It

During removal of **Efflux Doc-It**, the installer will prompt whether to delete user settings. By clicking **Yes**, all user settings will be deleted, **No**, user settings will be retained.

2. Licensing

Efflux Doc-IT licensing information is under the **About** section. **Efflux Doc-It** can be upgrade to **Doc-It Pro** to unlock advance features.



3. Efflux Doc-It Main Interface

Efflux Doc-It main interface consists of:

- Toolbar
- Documents panel
- Thumbnails panel
- Composition panel
- Preview panel
- Status bar at the bottom

3.1. Toolbar

Toolbar consists of few different items which are listed below:

- Configure
- Open
- Scan
- Camera
- Clear
- Composition Toolbox
- Composition Image Processing
- Save all documents & composition
- OCR language
- Profile

3.1.1. Configure

Configure button will open **Efflux Doc-It settings** page. The Settings page includes **Profiles settings** and **About**. On top of the menu there is a **Back to actions** button.

Shortcut Key: **CTRL+ALT+I**

! CAUTION: Remember to always click **Back to actions** button to save the changes.





3.1.2. Open

Open button will always open a dialog box to browse and select files. Multiple selection is supported in the open dialog box.

Shortcut Key: **CTRL+ALT+O**

3.1.3. Scan

Scan button will open the Twain driver source list. The process can be suppressed in Twain Scanner settings to automatically select preferred scanning device.

Shortcut Key: **CTRL+ALT+S**

3.1.4. Camera

Camera button will open a separate preview window which lists the webcams. The user can select one of the listed webcams to capture documents from it.

Shortcut Key: **CTRL+ALT+E**

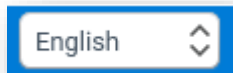
3.1.5. Clear

Clear button will clear everything in **Efflux Doc-It**.

Shortcut Key: **CTRL+ALT+X**

3.1.6. Composition Toolbox

The **Composition Toolbox** is now hidden by default. The item can be chosen from the top of **Efflux Doc-It** menu. It also has the option to show the toolbox back to the composition pane. The item is only available when the composed item is selected. Refer [3.4.1](#) Composition Toolbar section for details.



3.1.7. Composition Image Processing

The **Composition Image Processing** is now hidden by default. The item can be chosen from the top of **Efflux Doc-It** menu. It also has the option to show the toolbox back to the composition pane. The item is only available when the composed item is selected. Refer [3.4.2](#) Image Processing Toolbar section for details.

3.1.8. Save all documents & composition

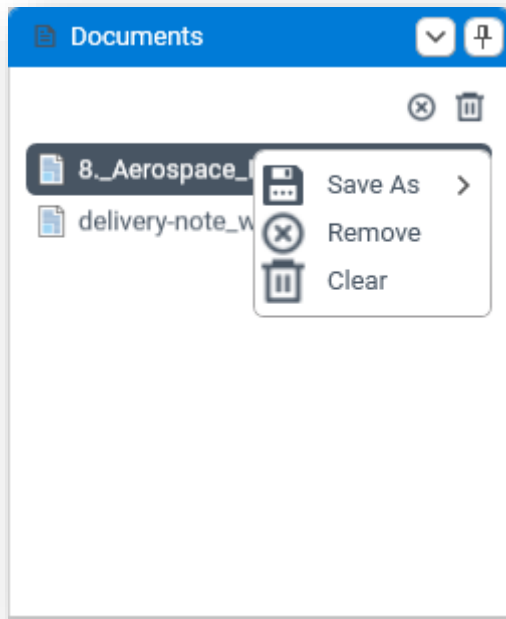
Clear button will clear everything in **Efflux Doc-It**.

3.1.9. OCR Language

Clear button will clear everything in **Efflux Doc-It**.

3.1.10. Profile

Profiles can be switched by clicking profile icon. Drop down list will appear to choose the appropriate profile.



3.2. Documents Panel

Documents panel is where the loaded documents will be listed. There are 3 icons visible in the **Documents** pane.

Remove – Remove selected item in **Documents** pane.

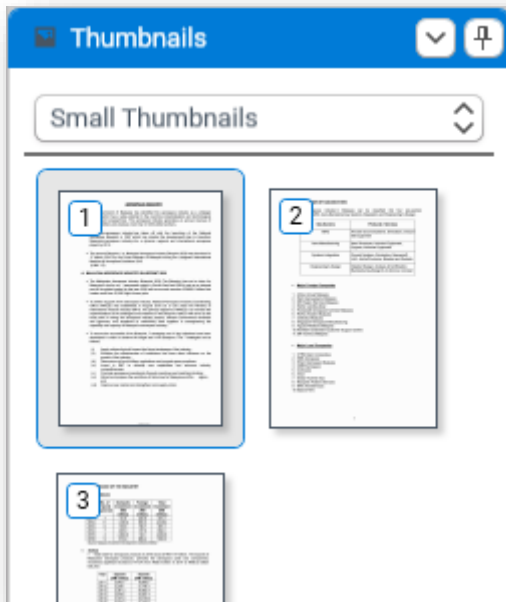
Clear – Clear all documents loaded in **Documents** pane.

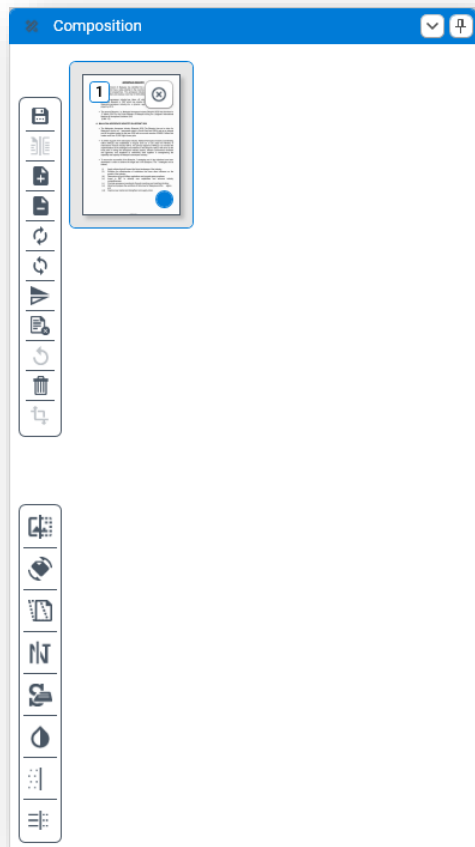
Save As – Convert document to below format.

- **Searchable PDF**
Shortcut Key: **CTRL+D+1**
- **PDF**
Shortcut Key: **CTRL+D+2**
- **DOCX** (Microsoft Office Word)
Shortcut Key: **CTRL+D+3**
- **XLSX** (Microsoft Office Excel)
Shortcut Key: **CTRL+D+4**

3.3. Thumbnails Panel

Thumbnail panel will display all pages from the document. Thumbnail size can be selected in small, medium, large, and X-large.

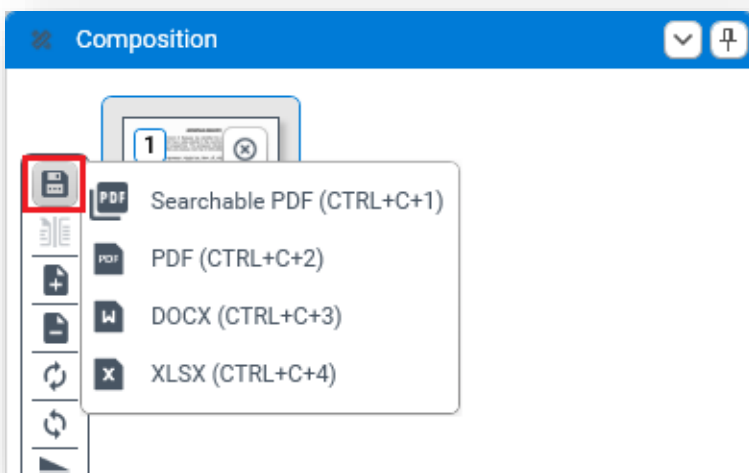




3.4. Composition Panel

Loaded documents can be manually edited in the Composition panel. Image processing tasks also supported in this panel.

The blue dot in the composition thumbnail indicate that redaction tool was being applied in the preview panel.

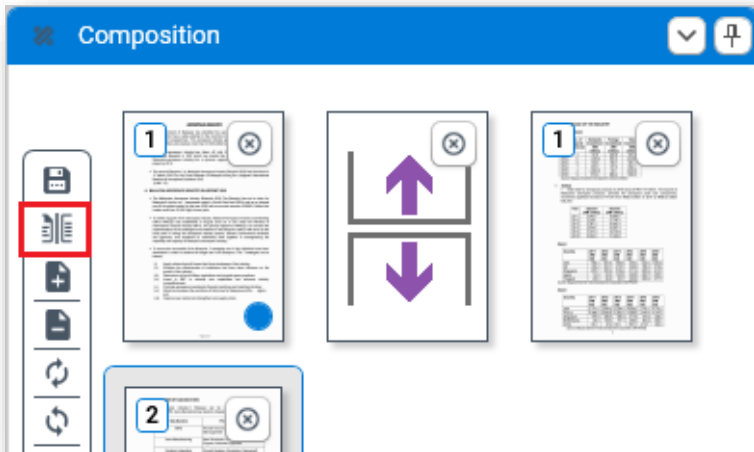


3.4.1. Composition Toolbar

3.4.1.1. Save

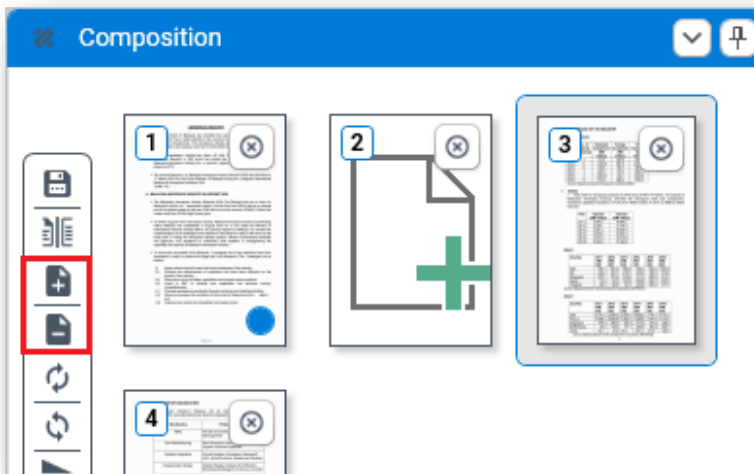
Save button support saving the document composition to

- **Searchable PDF**
Shortcut Key: **CTRL+C+1**
- **PDF**
Shortcut Key: **CTRL+C+2**
- **DOCX** (Microsoft Office Word)
Shortcut Key: **CTRL+C+3**
- **XLSX** (Microsoft Office Excel)
Shortcut Key: **CTRL+C+4**



3.4.1.2. Split

Split button allow document composition to be split into multiple files.

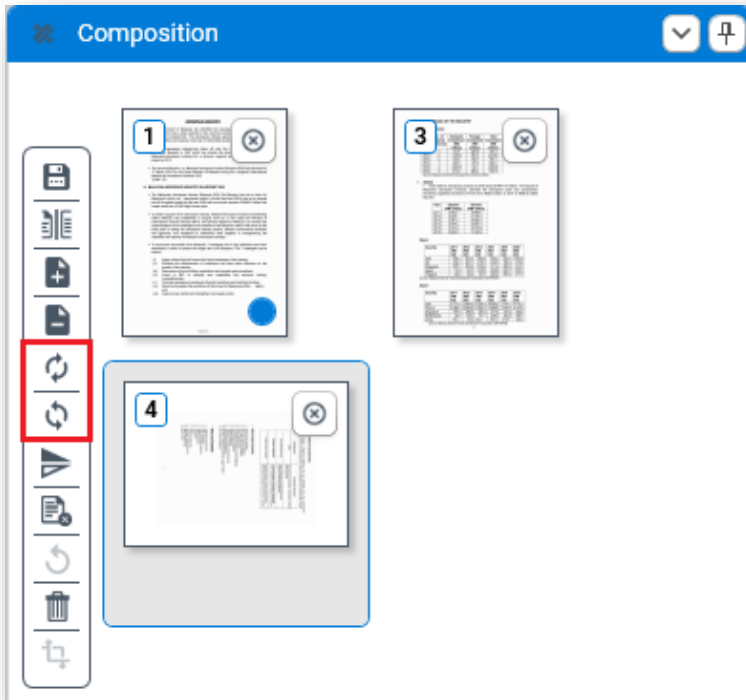


3.4.1.3. Insert Blank Page

Insert Blank Page button will add one or more blank pages to the document composition.

3.4.1.4. Delete Blank Page

Delete Blank Pages button will remove all blank pages added to the composed document by the **Insert Blank Page** button in the document composition.

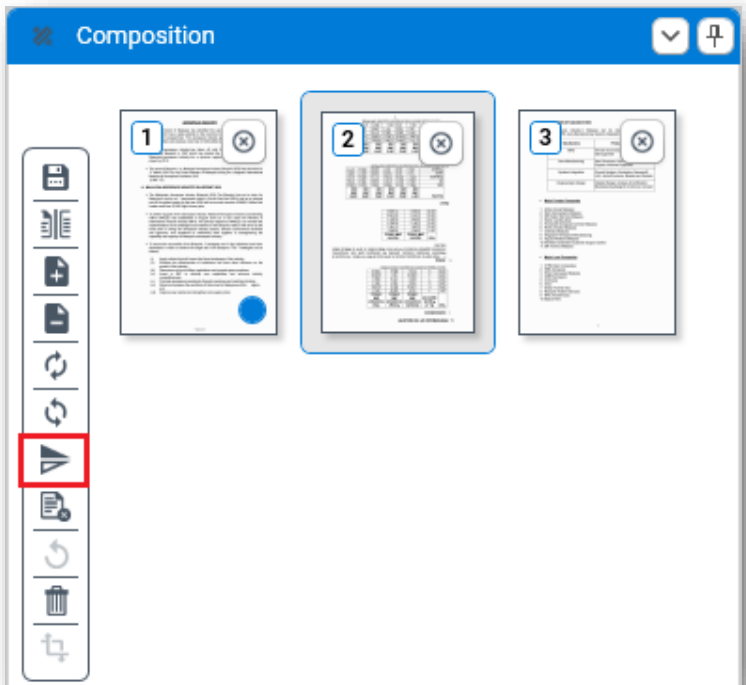


3.4.1.5. Rotate Clockwise

Rotate Clockwise button will rotate the selected page in composition 90 degree clockwise.

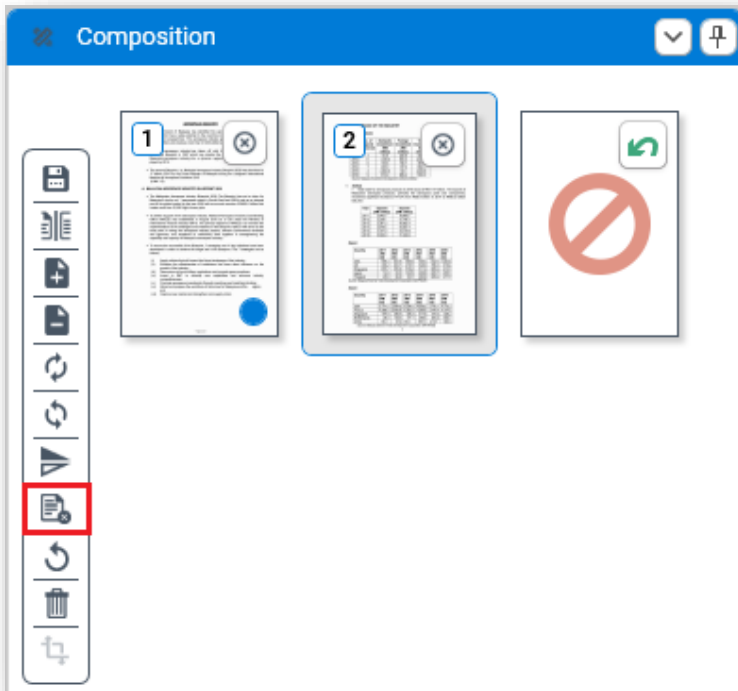
3.4.1.6. Rotate Counter-clockwise

Rotate Counter-clockwise button will rotate the selected page in composition 90 degree counter-clockwise.



3.4.1.7. Flip

Flip button will flip the selected page in composition vertically.

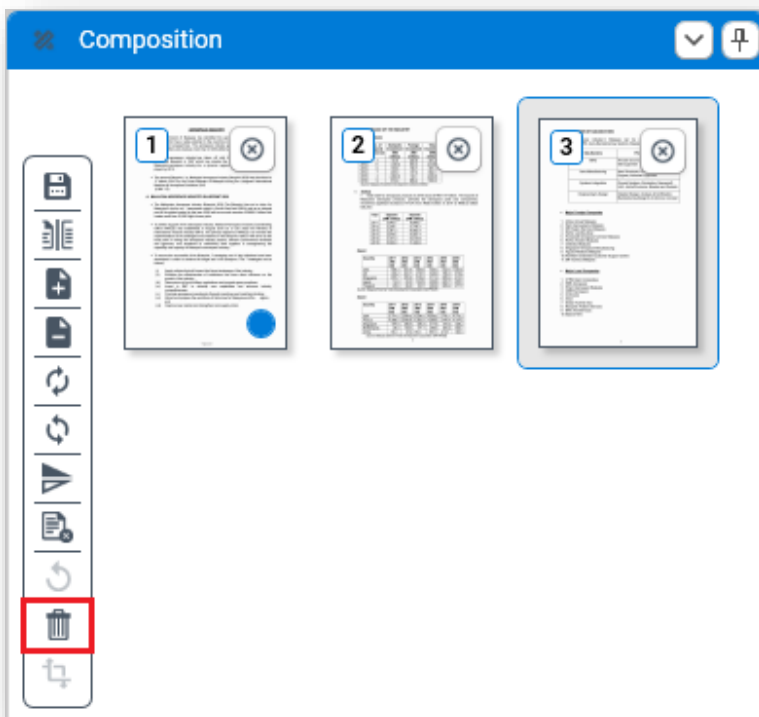


3.4.1.8. Delete Pages

Delete Pages button will delete selected page in the document composition.

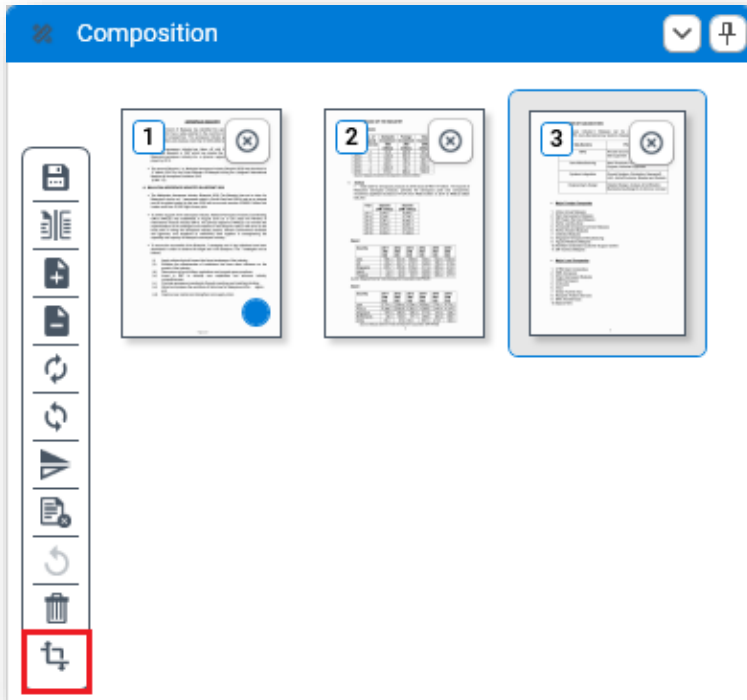
3.4.1.9. Undo

Undo button will undo the deletion of pages.



3.4.1.10. Clear

Clear button will delete everything in the document composition.



3.4.1.11. Crop

Crop button will crop the selected area made in preview panel.

3.4.2. Image Processing Toolbar

Efflux Doc-It now support image processing from the composition panel.

- Binarization
- Orientation
- Deskew
- Denoise
- Smoothing
- Invert text
- Dot removal
- Line removal

Example of image processing task **Invert text** applied to a page in composition panel.



3.4.2.1. Binarization

Binarization button will convert the document into monochrome level.



3.4.2.2. Orientation

Orientation button will automatically rotate the page to the upright position if it is rotated.



3.4.2.3. Deskew

Deskew button will automatically correct slight skewing of scanned documents.



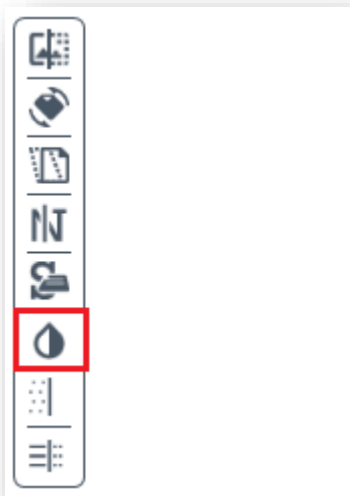
3.4.2.4. Denoise

Denoise button will removes noise from documents such as faxes or images scanned on a scanner with a dirty exposure glass.



3.4.2.5. Smoothing

Smoothing button will smooth the bumps in text in black and white documents.



3.4.2.6. Invert text

Invert Text button will invert white text on darker background to black text on brighter background and vice versa.

3.4.2.7. Dot Removal

Dot Removal will remove dots from black and white documents.



3.4.2.8. Line Removal

Line Removal will remove horizontal lines from scanned document.

3.5. Preview Panel

Preview panel will display a selected page from Thumbnails panel or Composition panel. OCR region can be draw here by left clicking the mouse and drag the cursor to select the area. Zoom is also supported in this panel.

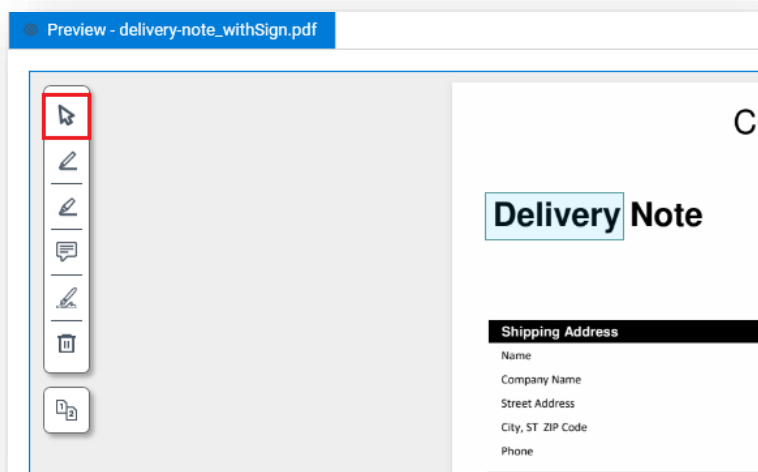
Document redaction toolbar will only be enabled if composition page is selected.

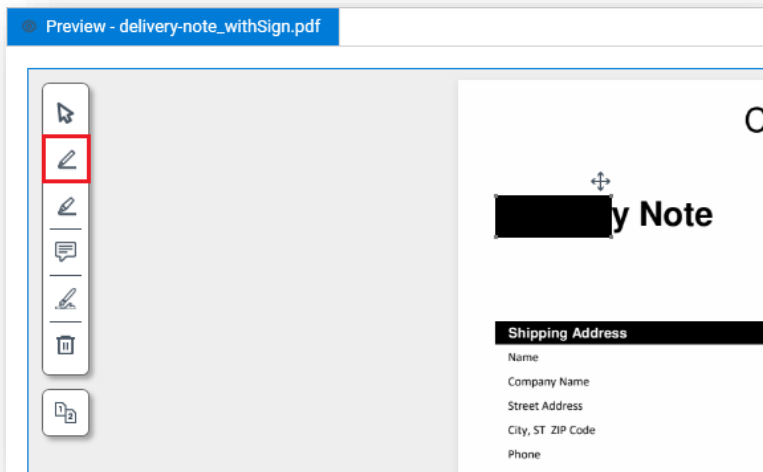
3.5.1. Document Redaction Toolbox

3.5.1.1. Select

Select button allow selection of area within document preview.

Shortcut Key: **CTRL+Space**

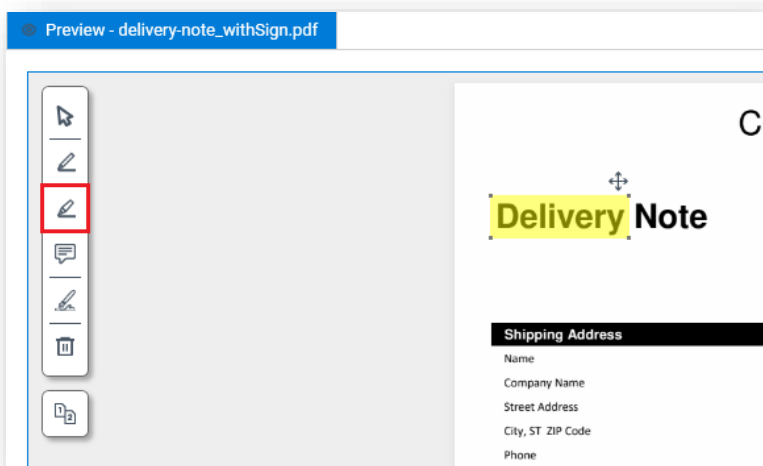




3.5.1.2. Mask

Mask button allow masking the selected area within document preview.

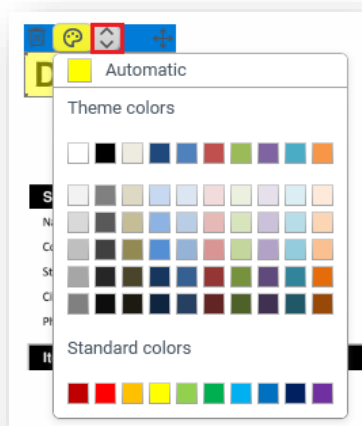
Shortcut Key: **CTRL+M**

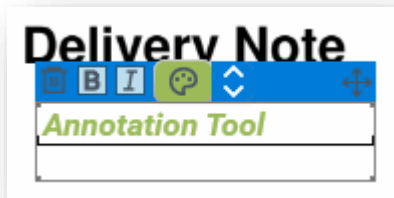
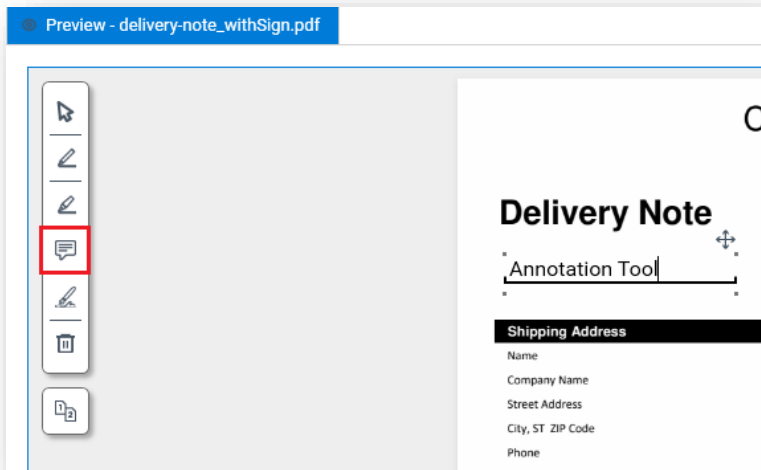


3.5.1.3. Highlight

Highlight tool allow highlighting text within document in the preview panel. The color can be change by hovering the highlighted area

Shortcut Key: **CTRL+H**





3.5.1.4. Annotation

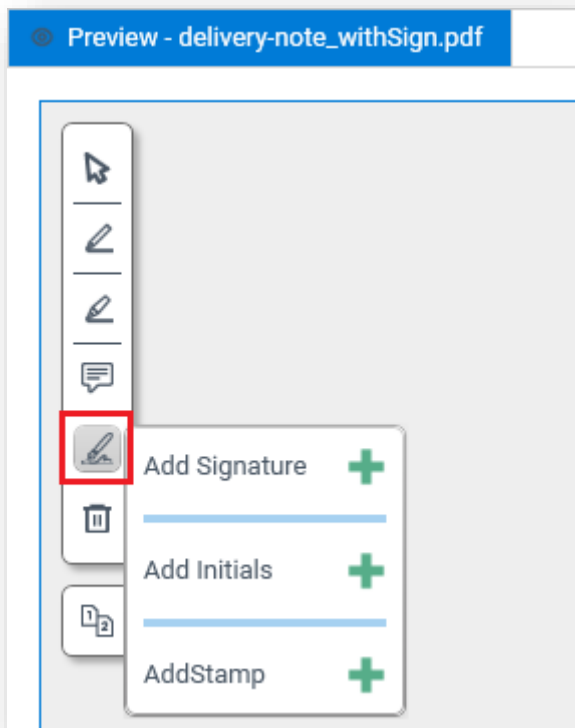
Annotation tool allow user to annotate the document

Shortcut Key: **CTRL+T**

Font style and color can be change by hovering to the annotation area.

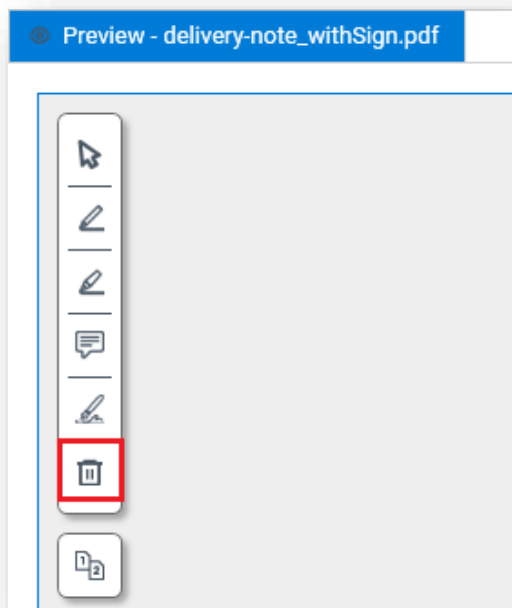
3.5.1.5. Signature, Initials and Stamp

Signature, Initials and Stamp button allow to add signature, initial and stamp into **Efflux Doc-It**. Click **+** button to open the new window with sign pad.





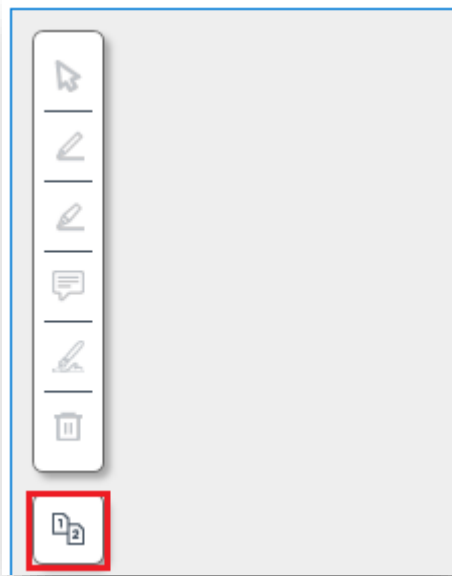
- **Apply** button will save the signature.
- **Cancel** button will close the signature window.
- **Clear** button will delete the unsaved signature in sign pad.
- **Import** button will allow to import a signature from image file.



3.5.1.6. Delete

Delete button will delete all redaction made in the document.

Shortcut Key: **CTRL+X**



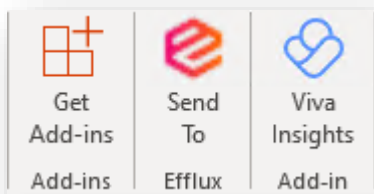
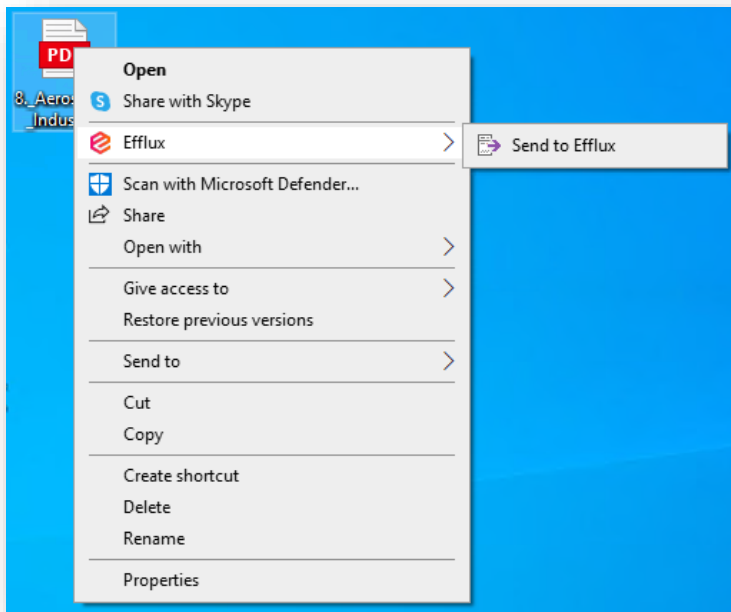
3.5.2. Compare

Compare button will compare the redacted document in **Preview** panel and in **Efflux Doc-It** template with the original document side by side.

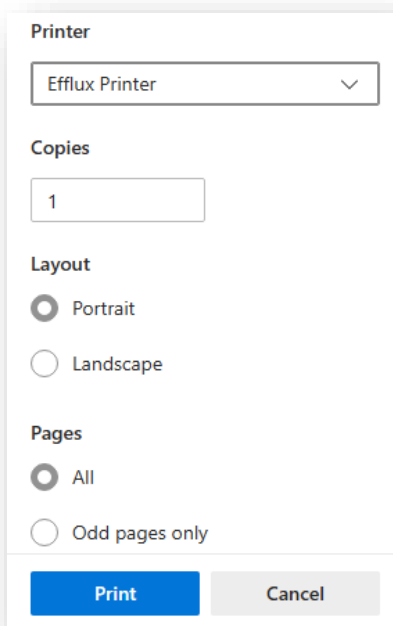
Shortcut Key: **CTRL+P**

3.5.3. Zoom

Zoom tool allow user to zoom the preview document composition. **Scroll bar, Ctrl + mouse scroll, drop down** and **manually enter the percentage number** are allowed in this feature.



View in Microsoft Outlook banner



3.6. Other Components

3.6.1. Context Menu

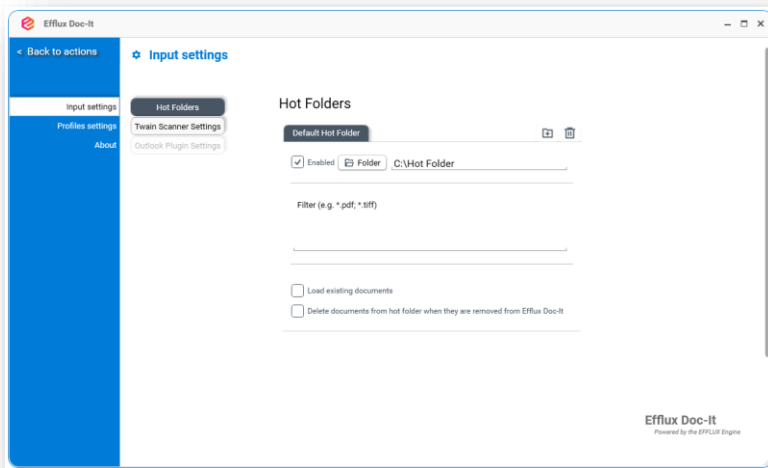
Efflux Doc-It allows documents to be sent directly from the Windows File Explorer context menu.

3.6.2. Outlook Plugin

Outlook plugin allows email to be sent into **Efflux Doc-It** for processing. All file types supported by **Efflux Doc-It** will be sent to **Efflux Doc-It** by default. To filter by specific file name or extension, refer **Outlook Plugin Settings** in section [4.3](#).

3.6.3. Efflux Printer

Efflux Printer allows printing documents to **Efflux Doc-It** from any application.



4. Input Settings

The new **Efflux Doc-It** now has the ability to load all supported files within a specified directory. This directory can be located on local or network drives.

4.1. Hot Folder

4.1.1. Enable Hot Folder

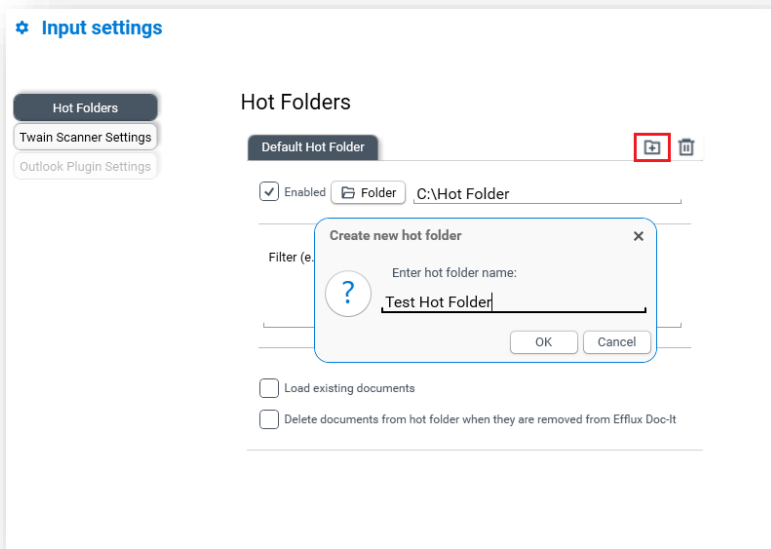
1. Go to **Settings** page
2. Under **Input settings**, click **Hot Folders** tab
3. Under **Default Hot Folder** tab, Check **Enabled**
4. Click **Folder** button to browse and select the hot folders
5. Go back to main page to save the settings

Other options which are available within hot folder settings.

Filter – **Efflux Doc-It** will only load file type specified here from the hot folder.

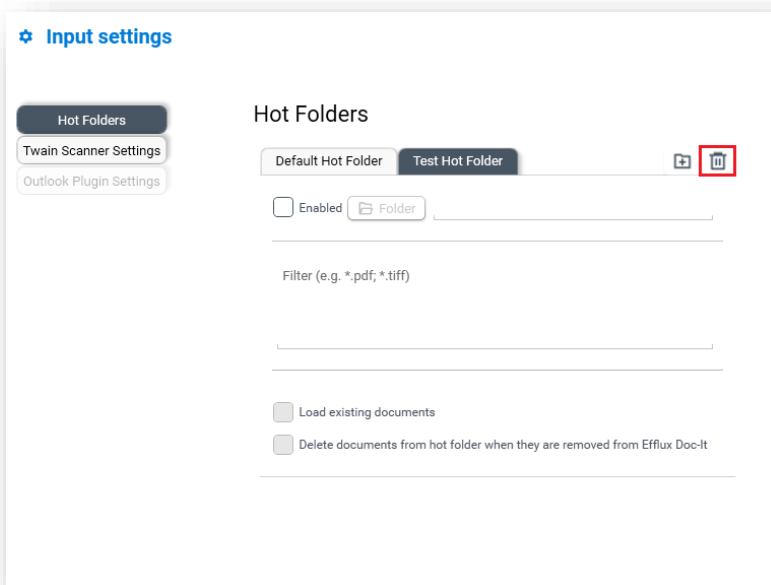
Load existing documents – **Efflux Doc-It** will load all documents that currently exist in the hot folder.

Delete documents from hot folder when they are removed from Efflux Doc-It Capture – **Efflux Doc-It** will delete the document permanently from the computer when it is being removed or cleared in **Efflux Doc-It**.



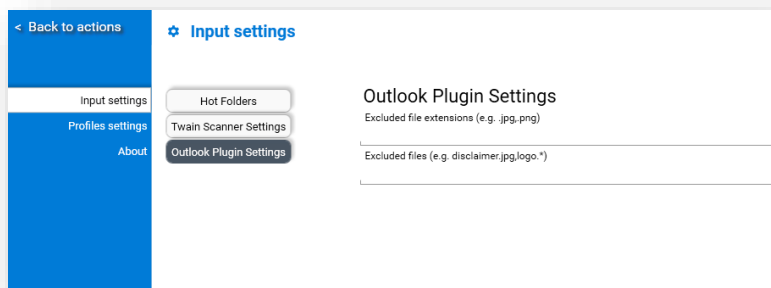
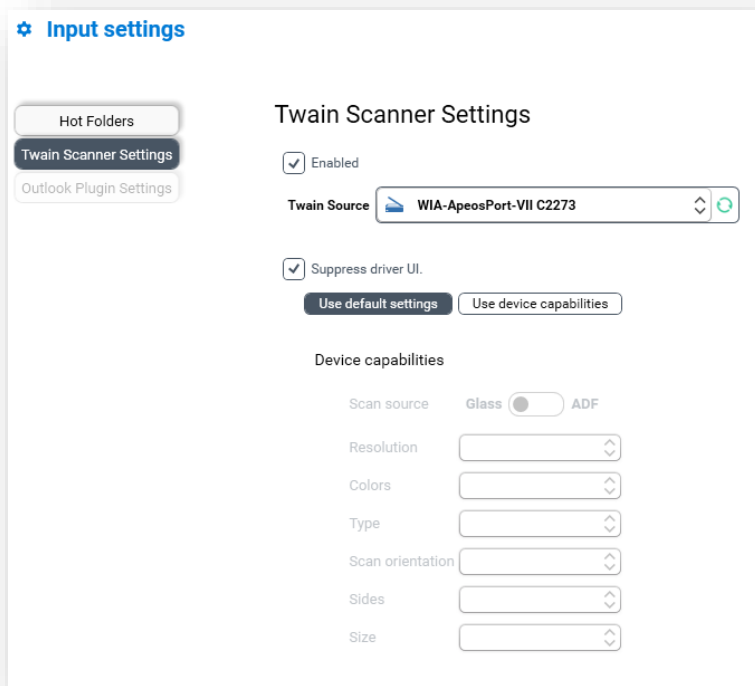
4.1.2. Create additional hot folder

1. Go to **Settings** page and select **Input settings**
2. Click **Hot Folders** tab
3. On the same row of **Default Hot Folder** tab, click add folder icon
4. Give a name to the new hot folder and click **OK**
5. Go back to main page to save the setting



4.1.3. Remove additional hot folder

1. Go to **Settings** page and select **Input settings** and
2. Click **Hot Folders** tab
3. Select additional hot folder tab that needs to be deleted
4. Click delete icon on the same row of hot folder tab
5. Go back to main page to save the settings



4.2. Twain Scanner Settings

Twain scanning can be automated by preconfiguring it in this setting.

Enabled – Is to activate this setting.

Twain Source – Selected scanner will be use as default when scanning

Supress driver UI – activate this option to suppress scanner window. By activating this, these 2 options will be available to choose.

- **Use default settings** – by selecting this option, **Efflux Doc-It** will use scanner default settings
- **Use device capabilities** – supported device will allow some settings to be enable within this option

4.3. Outlook Plugin Settings

Outlook plugin allows email to be send into **Efflux Doc-It** for processing. Specific file name or extension can be excluded when sending the email which can be specified in the filter settings. There are 2 types of filters.

1. Filter by file extension – File with specified extension will not be send to **Efflux Doc-It**.
2. Filter by file name – File with specified name will not be send into **Efflux Doc-It**. Wildcards are allowed in the text area.

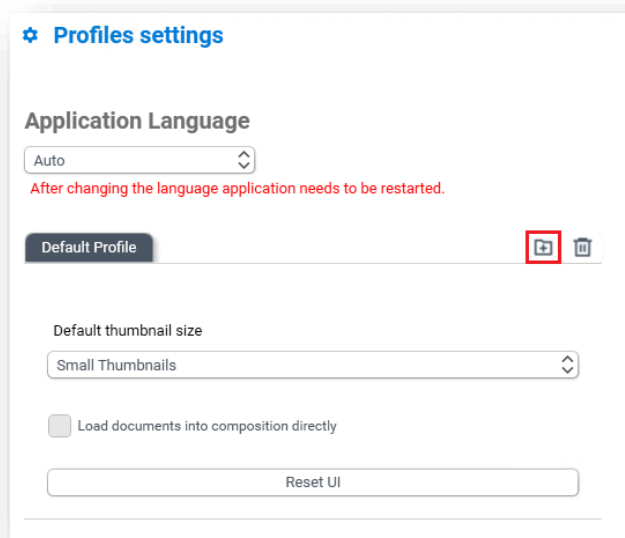
5. Profile

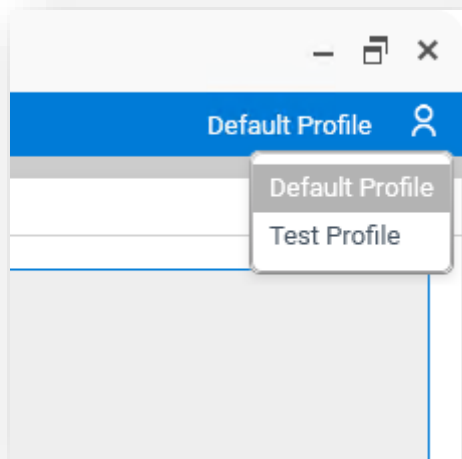
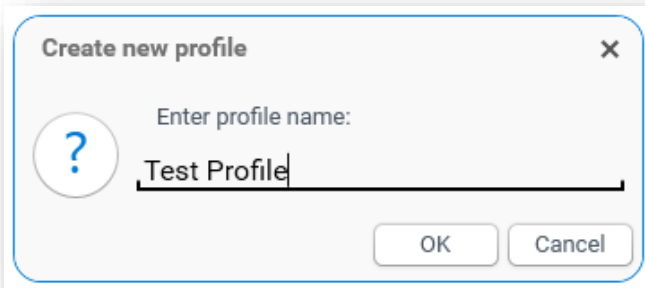
Profile allows the use of multiple settings of screen layout and the look and feel of **Efflux Doc-It**. Profiles contain 4 different settings.

1. **Application Language** – This setting allows user to change the **Efflux Doc-It** language to the desire language. This setting requires **Efflux Doc-It** to restart for it to be applied.
2. **Default thumbnail size** – This option is used to set default thumbnail size for that profile
3. **Load documents into composition directly** – This option only enable for additional profiles created. Default profile does not support this feature. When enabled, documents will be added automatically into composition after opening or loading files from hot folder.
4. **Reset UI** – This button is used to reset layout changes in **Efflux Doc-It** profiles. After reset, original default layout will be loaded again

5.1. Create Additional Profiles

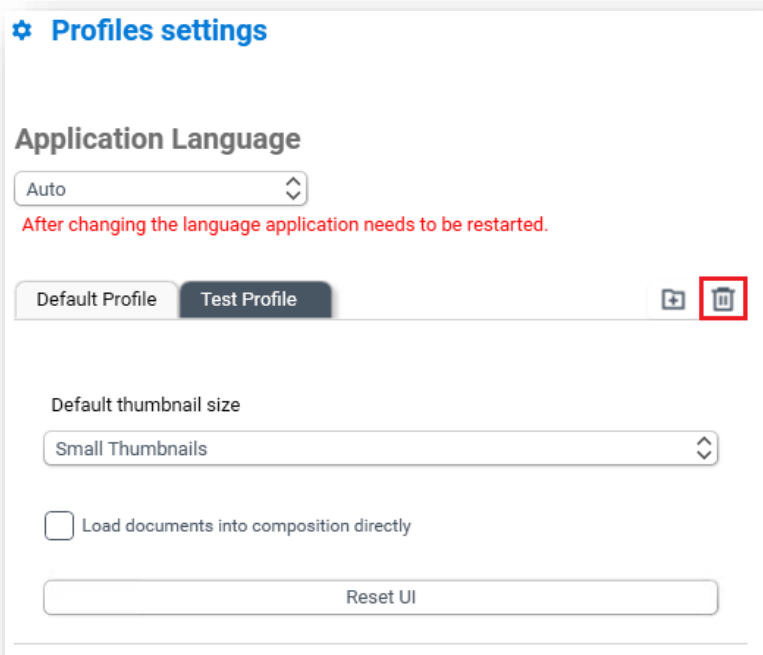
1. Go to **Setting** page and select **Profiles**
2. On the same row of **Default Profile** tab, click add profile icon





3. Give a name to the new profile and click **OK**

4. Go back to main page to save the settings
5. Switching to new profile can be done from top right of **Efflux Doc-It**



5.2. Remove Additional Profiles

1. Go to **Setting** page and select **Profiles**
2. Select additional profile tab, click delete profile icon
3. Go back to main page to save the settings

