

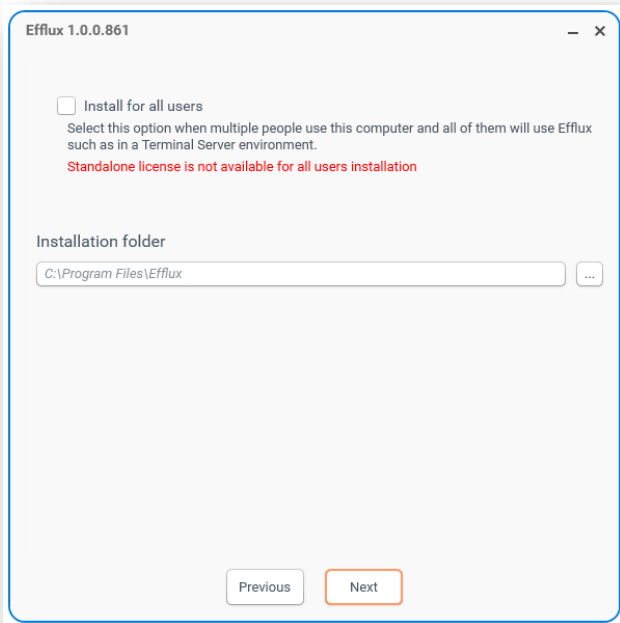
User Guide
Efflux Doc-It Pro
Version 1.0



INDEX

1. Installation / Uninstallation	1
1.1. <i>Install Efflux Doc-It Pro.....</i>	1
1.2. <i>Uninstall Efflux Doc-It Pro</i>	2
2. Licensing	2
3. Efflux Doc-It Pro Main Interface	3
3.1. <i>Toolbar</i>	3
3.1.1. <i>Configure</i>	3
3.1.2. <i>Open.....</i>	4
3.1.3. <i>Scan.....</i>	4
3.1.4. <i>Camera</i>	4
3.1.5. <i>Clear</i>	4
3.1.6. <i>Composition Toolbox</i>	5
3.1.7. <i>Composition Image Processing</i>	5
3.1.8. <i>Save all documents & composition</i>	5
3.1.9. <i>OCR Language.....</i>	5
3.1.10. <i>Profile</i>	5
3.2. <i>Documents Panel</i>	6
3.3. <i>Thumbnails Panel</i>	6
3.4. <i>Composition Panel.....</i>	7
3.4.1. <i>Composition Toolbar.....</i>	7
3.4.2. <i>Image Processing Toolbar.....</i>	11
3.5. <i>Preview Panel.....</i>	16
3.5.1. <i>Document Redaction Toolbox</i>	16
3.5.2. <i>Compare.....</i>	19
3.5.3. <i>Zoom</i>	19
3.6. <i>Other Components</i>	20
3.6.1. <i>Context Menu</i>	20
3.6.2. <i>Outlook Plugin</i>	20
3.6.3. <i>Efflux Printer</i>	20
4. Input Settings.....	21
4.1. <i>Hot Folder</i>	21
4.1.1. <i>Enable Hot Folder</i>	21
4.1.2. <i>Create additional hot folder</i>	22
4.1.3. <i>Remove additional hot folder</i>	22
4.2. <i>Twain Scanner Settings.....</i>	23
4.3. <i>Outlook Plugin Settings.....</i>	23
5. Output Settings.....	24
5.1. <i>DocVolante Connector.....</i>	24
5.1.1. <i>Create DocVolante Connection.....</i>	24
5.1.2. <i>Configure DocVolante Connector</i>	25
5.1.3. <i>Associate Efflux Doc-It Pro template with DocVolante Connector... 27</i>	27
5.3. <i>SharePoint OneDrive Connector.....</i>	28
5.3.1. <i>Create SharePoint OneDrive Connection</i>	28
5.3.2. <i>Configure SharePoint OneDrive Connector</i>	30
5.3.3. <i>Associate Efflux Doc-It Pro template with SharePoint OneDrive Connector 31</i>	31
5.3. <i>PowerSharp Connector.....</i>	32
5.3.1. <i>Configure PowerSharp Connectors.....</i>	32
5.4.2. <i>Associate Efflux Doc-It Pro template with PowerSharp Connector.. 33</i>	33
5.6. <i>Question Settings</i>	34
6. Optical Character Recognition	36
6.1. <i>Converting File to Other Formats</i>	36
6.2. <i>Zone OCR and Barcode Reader</i>	37
6.3. <i>Upload File to Connector or File System.....</i>	37
7. Efflux Doc-It Pro Template	38
7.1. <i>Create Additional Template</i>	38
7.2. <i>Upload Settings.....</i>	39

7.3. <i>Image Processing Settings</i>	41
7.4. <i>Document Redaction</i>	41
7.4.1. Adding new regex	42
7.4.2. Adding new phrase	43
7.4.3. Modifying regex or phrase.....	43
7.4.4. Disabling regex or phrase	44
7.4.5. Deleting regex or phrase	45
7.5. <i>Composition Save Action</i>	45
7.6. <i>Association</i>	46
7.6.1. Efflux Doc-It Pro Connectors' Instances.....	46
7.6.2. File System.....	47
8. Profile settings	48
8.1. <i>Create Additional Profiles</i>	49
8.2. <i>Remove Additional Profiles</i>	50



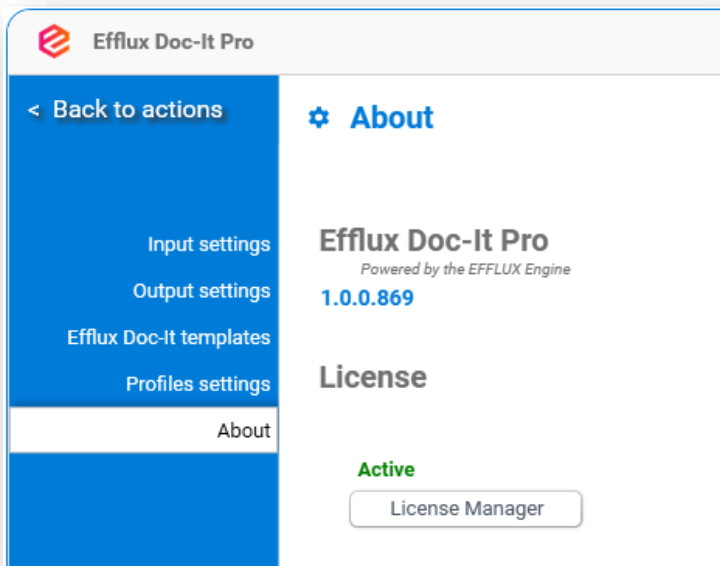
1. Installation / Uninstallation

1.1. Install Efflux Doc-It Pro

Efflux Doc-It Pro offers two modes of installation,

- **Single user mode** – Recommended mode if only one user is using the computer. User should be able to access and modify all settings in **Efflux Doc-It Pro**
- **All users mode** – Recommended mode if more than one user is using the same computer. Some settings are only accessible with administrator privileges

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

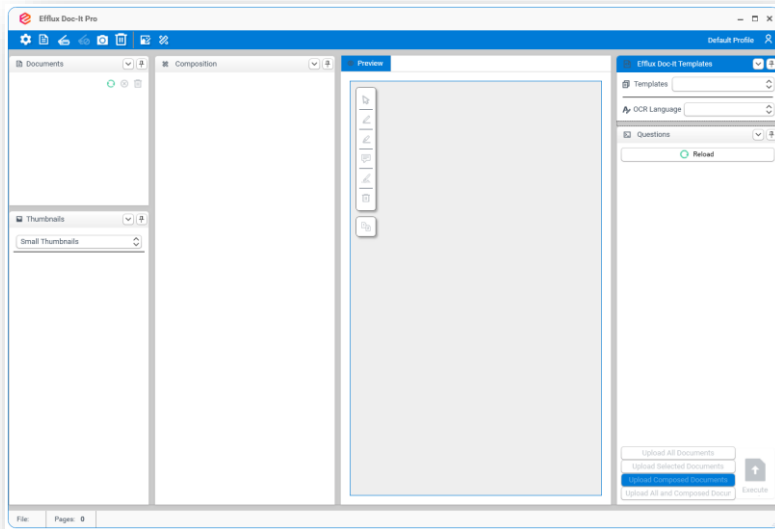


1.2. Uninstall Efflux Doc-It Pro

During removal of **Efflux Doc-It Pro**, 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 Pro licensing information is under the **About** section. **Efflux Doc-It Pro** can be upgrade to **Doc-It Pro** to unlock more features.



3. Efflux Doc-It Pro Main Interface

Efflux Doc-It Pro main interface consists of:

- Toolbar
- Documents panel
- Thumbnails panel
- Composition panel
- Preview panel
- **Efflux Doc-It** Templates panel
- Questions/Metadata 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 Pro 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

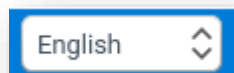
Camera button will open a separate preview window which lists the webcams. The user can select one of the listed webcams to capture documents from it.

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

3.1.5. Clear

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

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 Pro** 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 Pro** 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

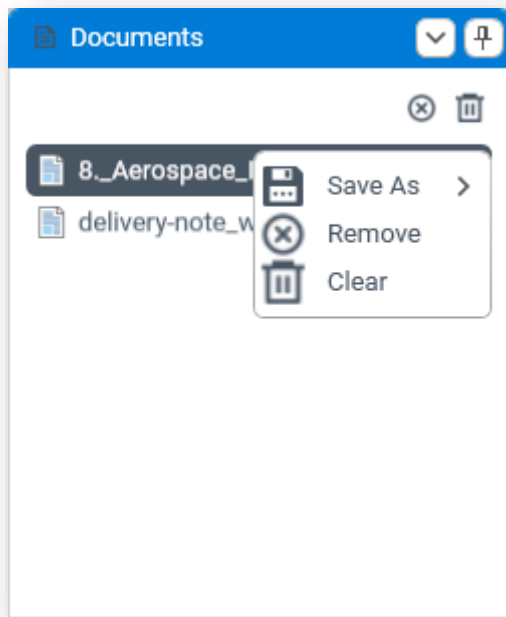
Clear button will clear everything in **Efflux Doc-It Pro**.

3.1.9. OCR Language

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

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.

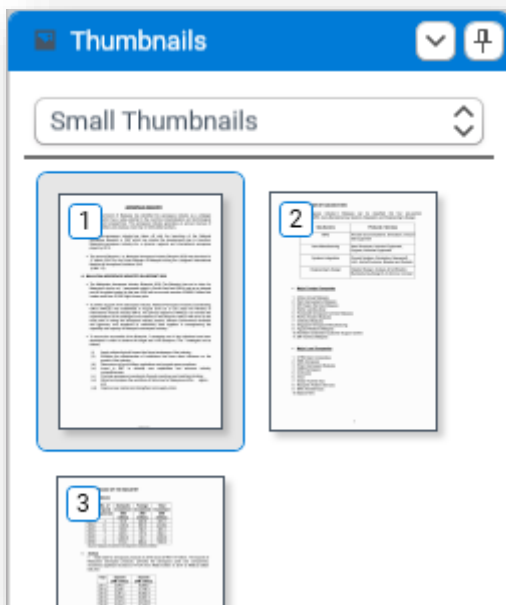
Clear – Clear all documents loaded in **Documents** pane.

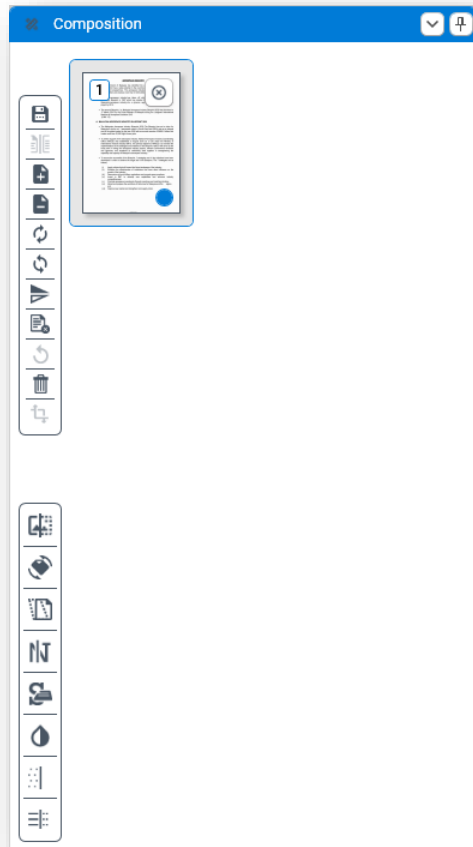
Save As – Convert document to below format.

- **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.

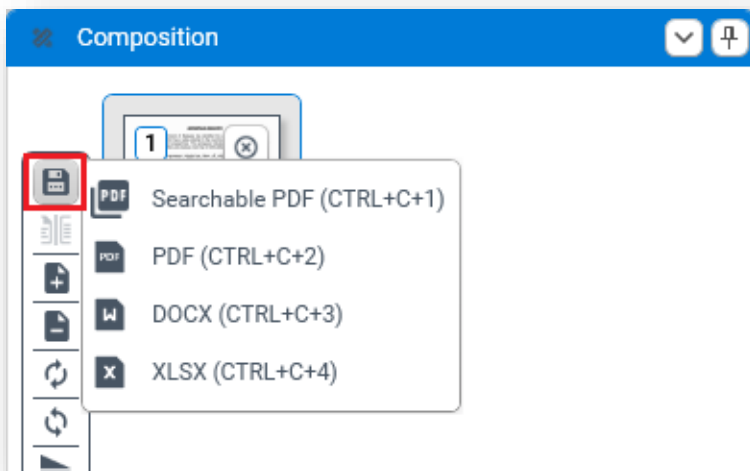




3.4. Composition Panel

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.

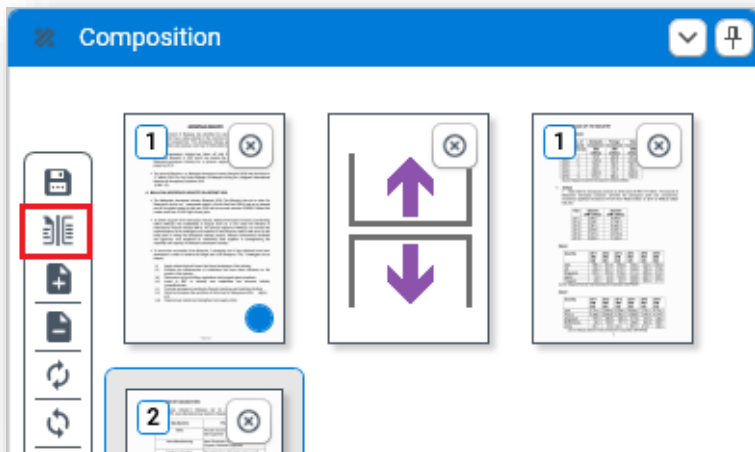


3.4.1. Composition Toolbar

3.4.1.1. Save

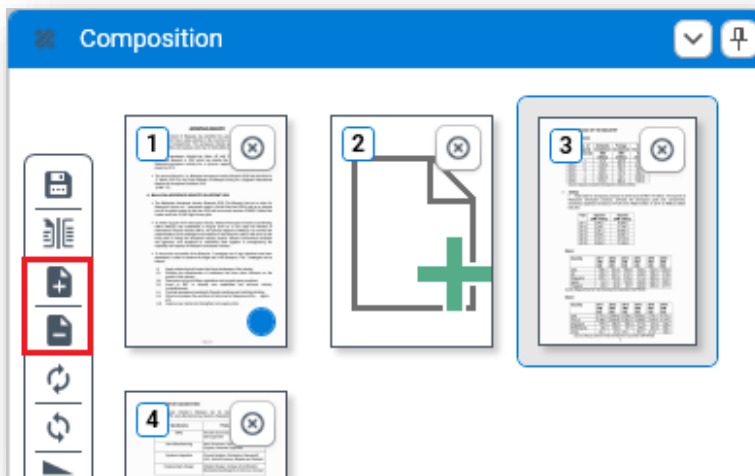
Save button support saving the document composition to

- **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.

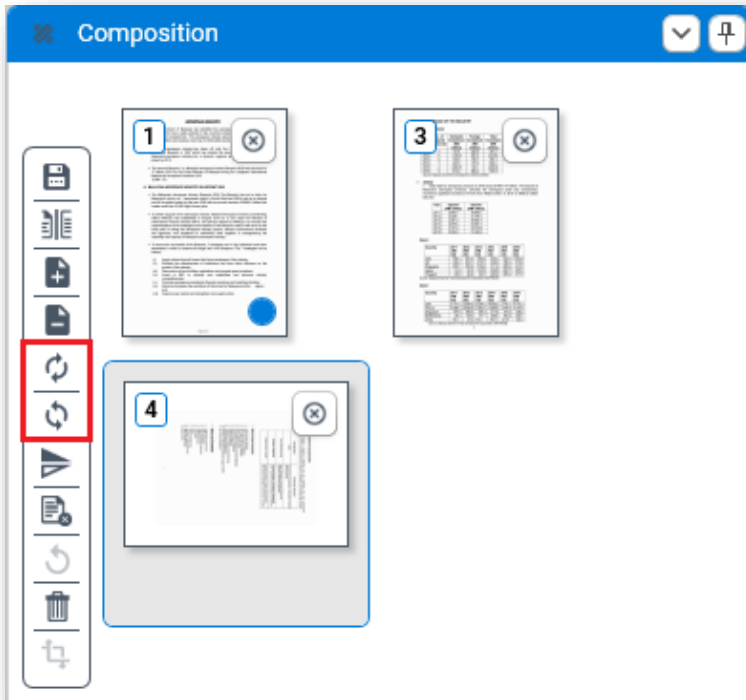


3.4.1.3. Insert Blank Page

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.

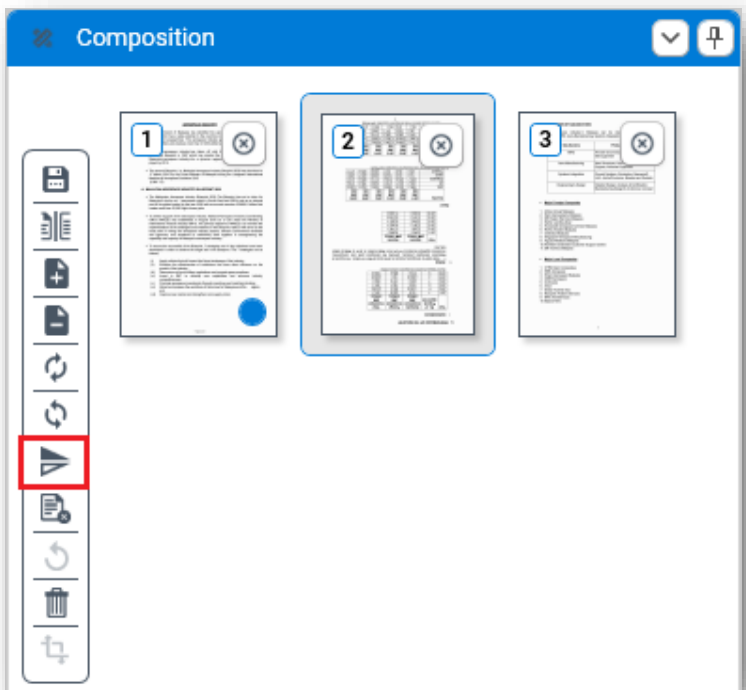


3.4.1.5. Rotate Clockwise

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

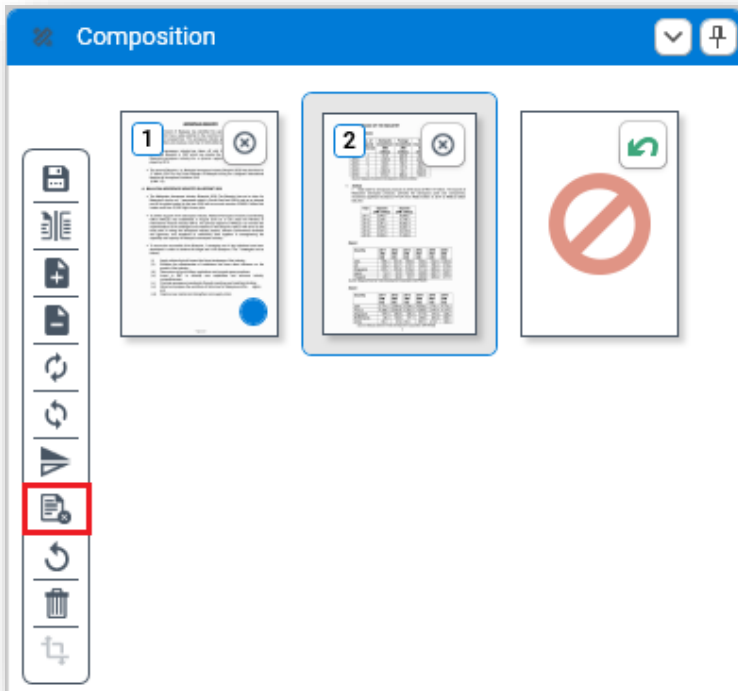
3.4.1.6. Rotate Counter-clockwise

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.

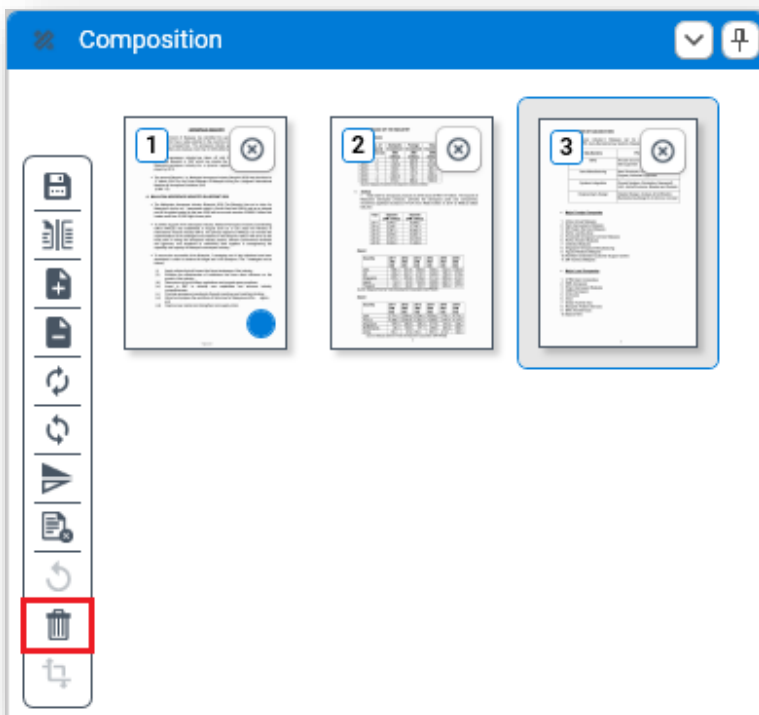


3.4.1.8. Delete Pages

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

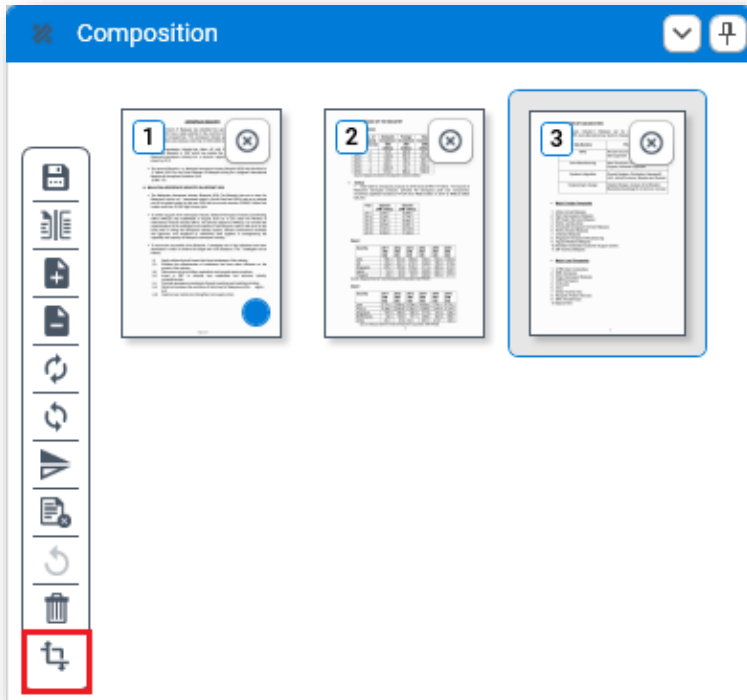
3.4.1.9. Undo

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

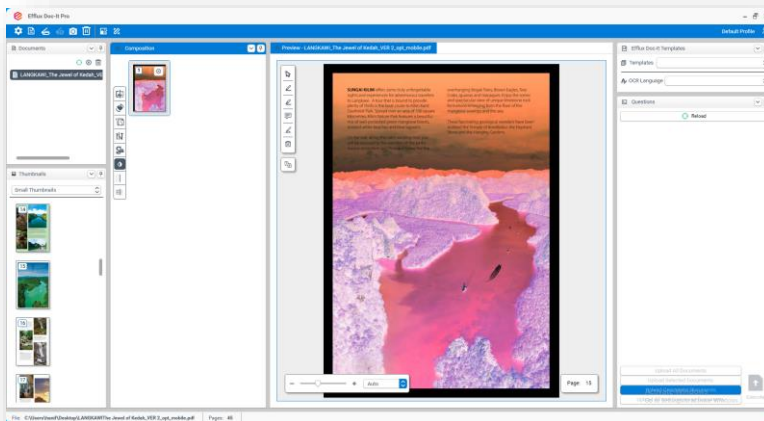
Crop button will crop the selected area made in preview panel.

3.4.2. Image Processing Toolbar

Efflux Doc-It Pro 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.



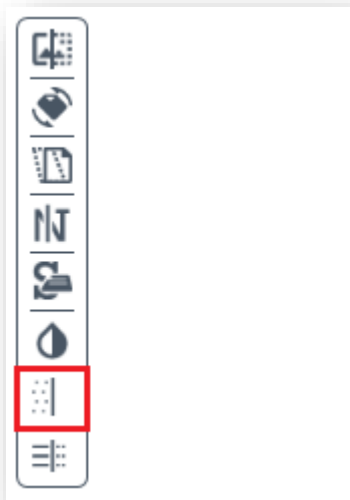
3.4.2.5. Smoothing

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.

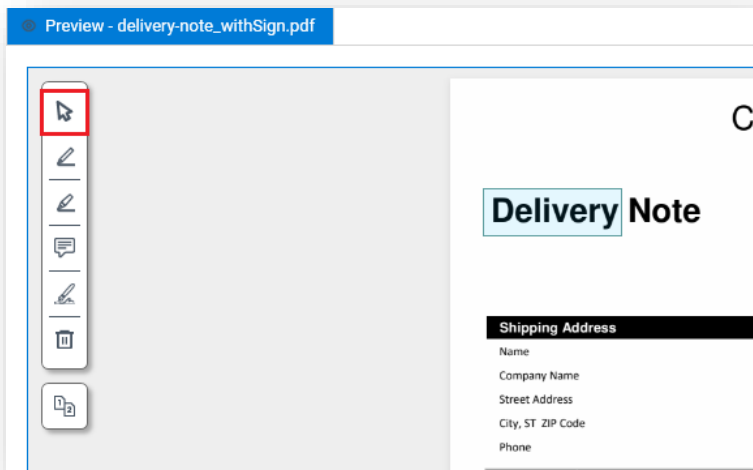
Document redaction toolbar will only be enabled if composition page is selected.

3.5.1. Document Redaction Toolbox

3.5.1.1. Select

Select button allow selection of area within document preview.

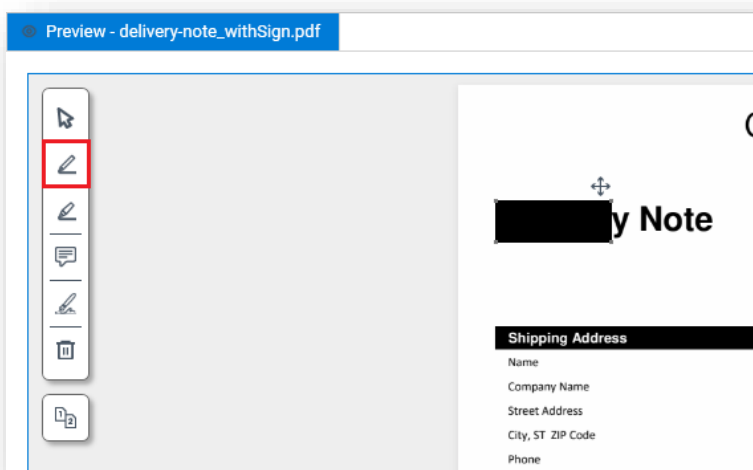
Shortcut Key: **CTRL+Space**

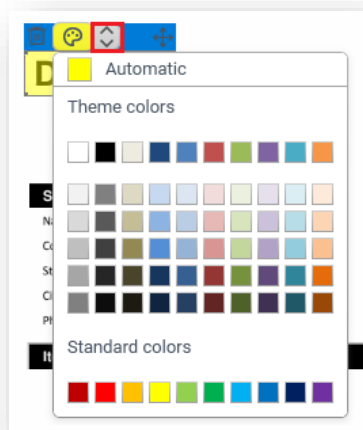
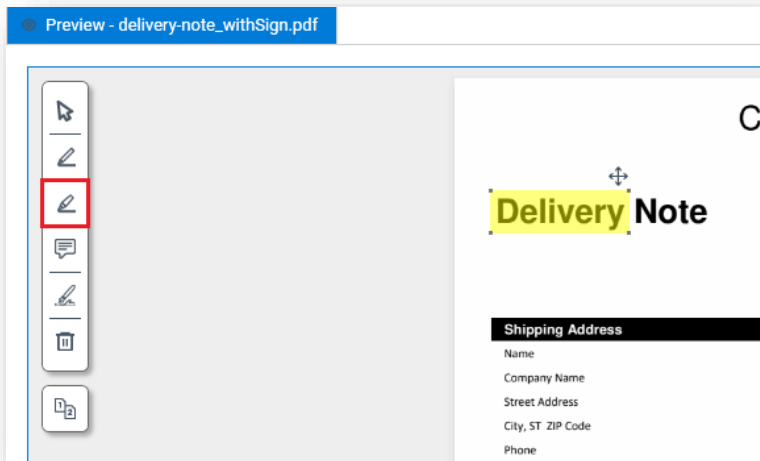


3.5.1.2. Mask

Mask button allow masking the selected area within document preview.

Shortcut Key: **CTRL+M**

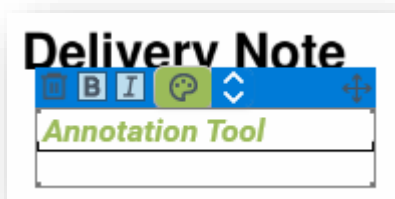
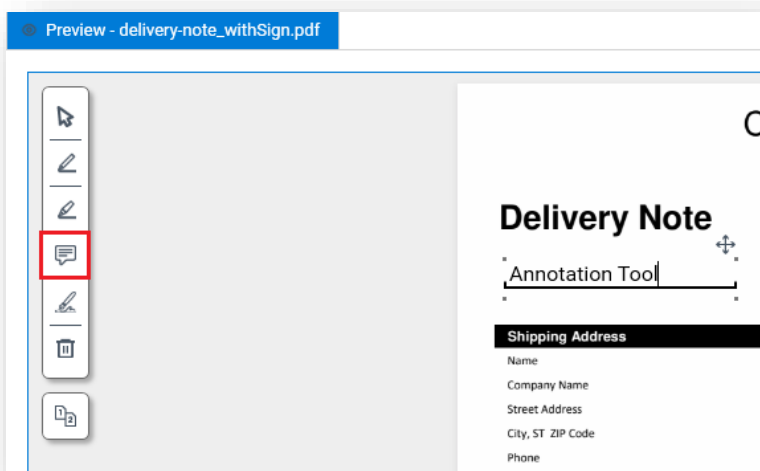




3.5.1.3. Highlight

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**



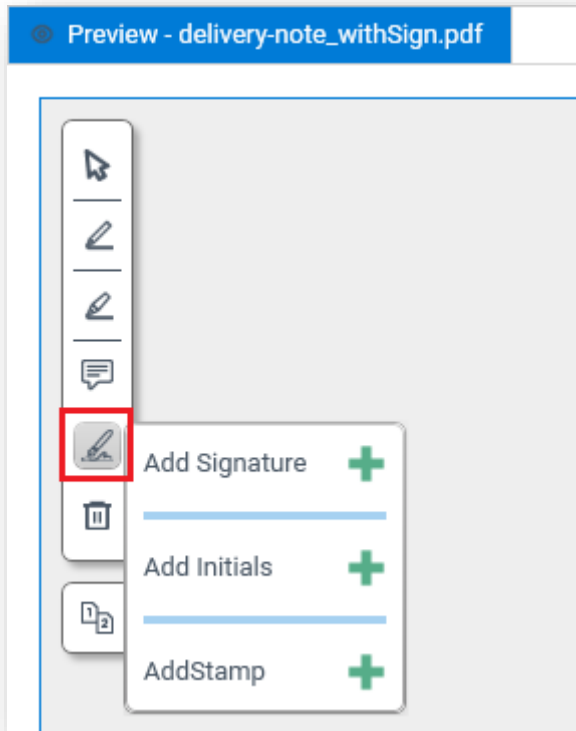
3.5.1.4. Annotation

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.

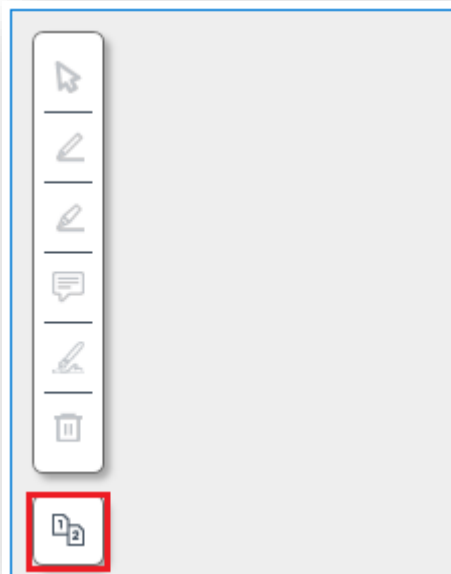
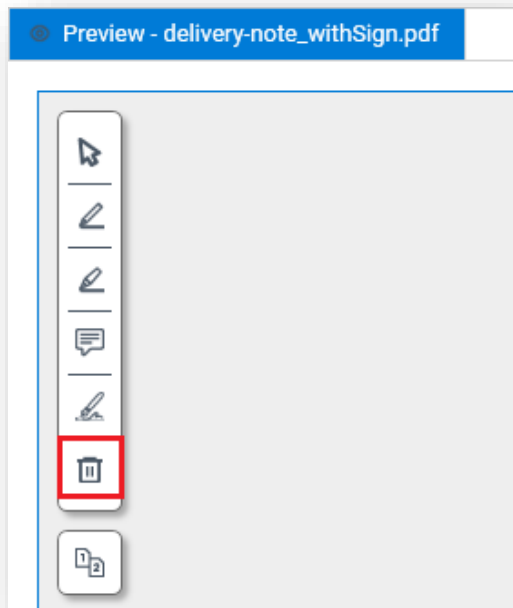
3.5.1.5. Signature, Initials and Stamp



Signature, Initials and Stamp button allow to add signature, initial and stamp into **Efflux Doc-It Pro**. 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**

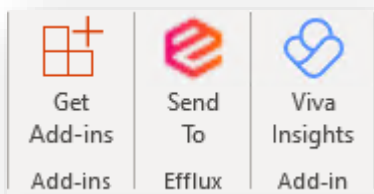
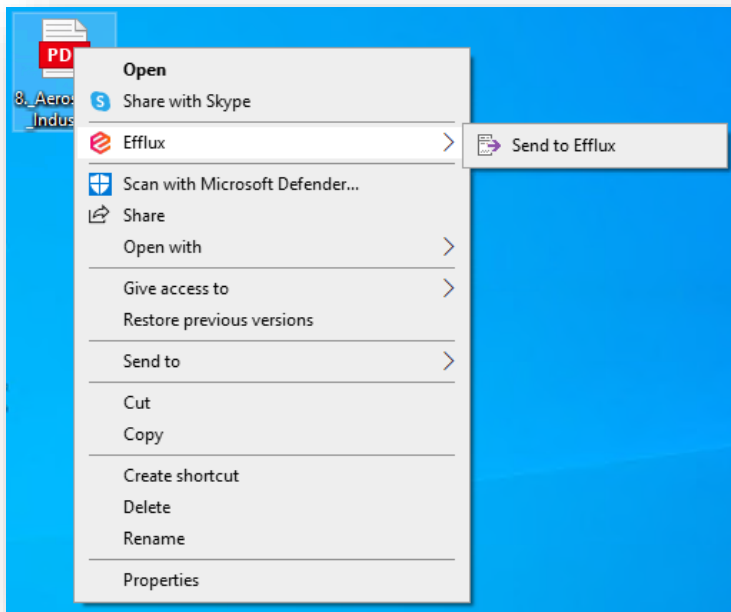
3.5.2. Compare

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

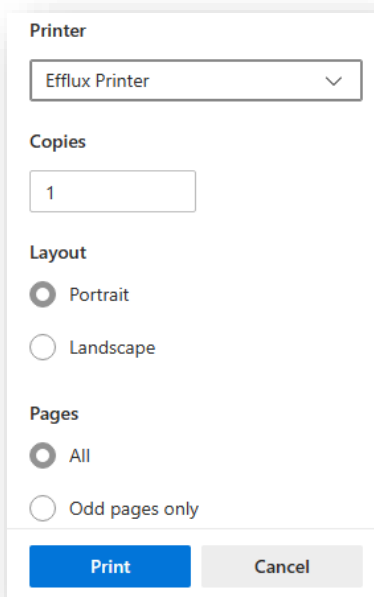
Shortcut Key: **CTRL+P**

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

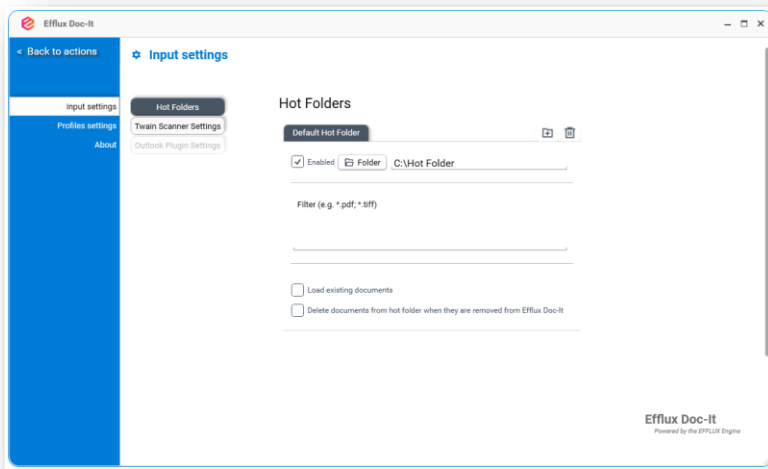
Efflux Doc-It Pro allows documents to be sent directly from the Windows File Explorer context menu.

3.6.2. Outlook Plugin

Outlook plugin allows email to be sent into **Efflux Doc-It Pro** for processing. All file types supported by **Efflux Doc-It Pro** will be sent to **Efflux Doc-It Pro** 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 Pro** 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

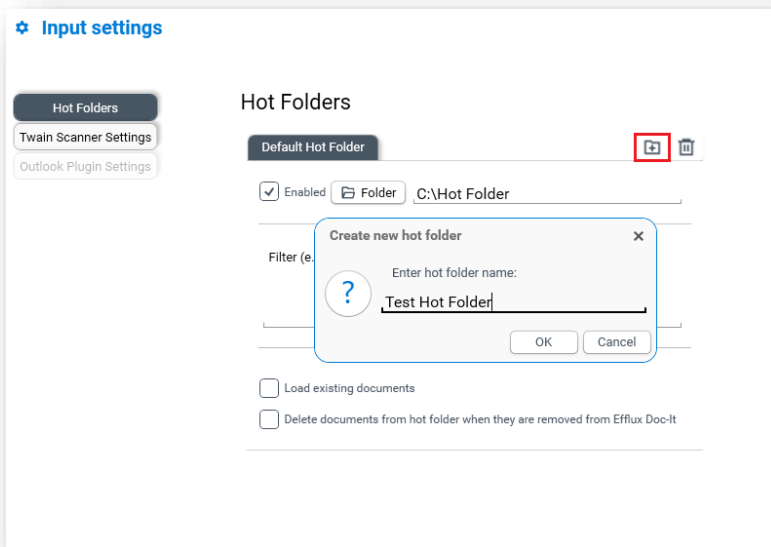
1. Go to **Settings** page
2. Under **Input settings**, click **Hot Folders** tab
3. Under **Default Hot Folder** tab, Check **Enabled**
4. Click **Folder** button to browse and select the hot folders
5. Go back to main page to save the settings

Other options which are available within hot folder settings.

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

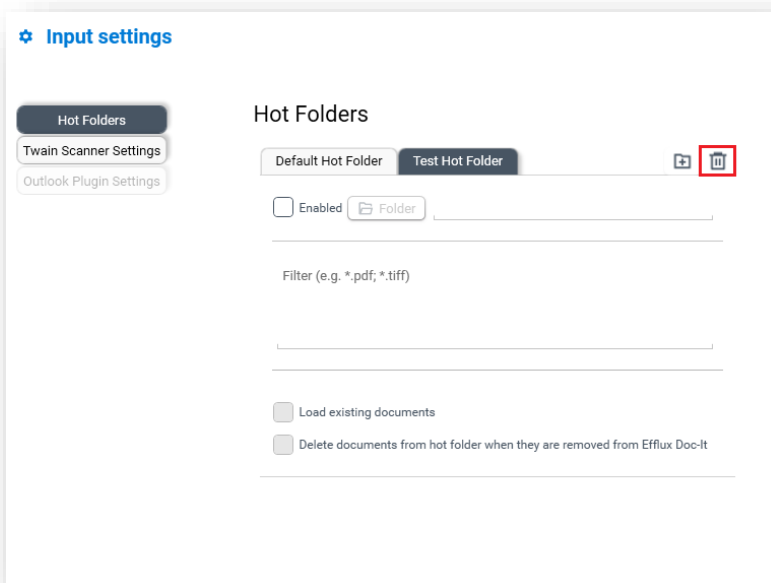
Load existing documents – **Efflux Doc-It Pro** will load all documents that currently exist in the hot folder.

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



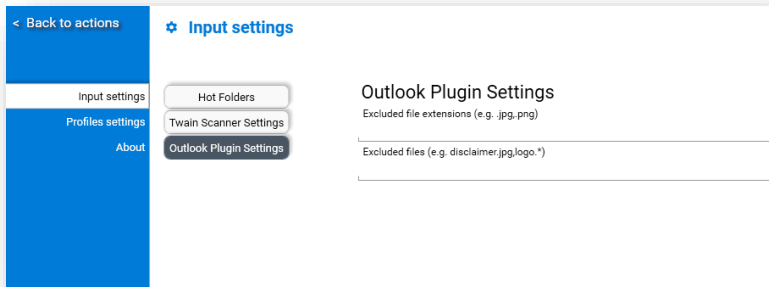
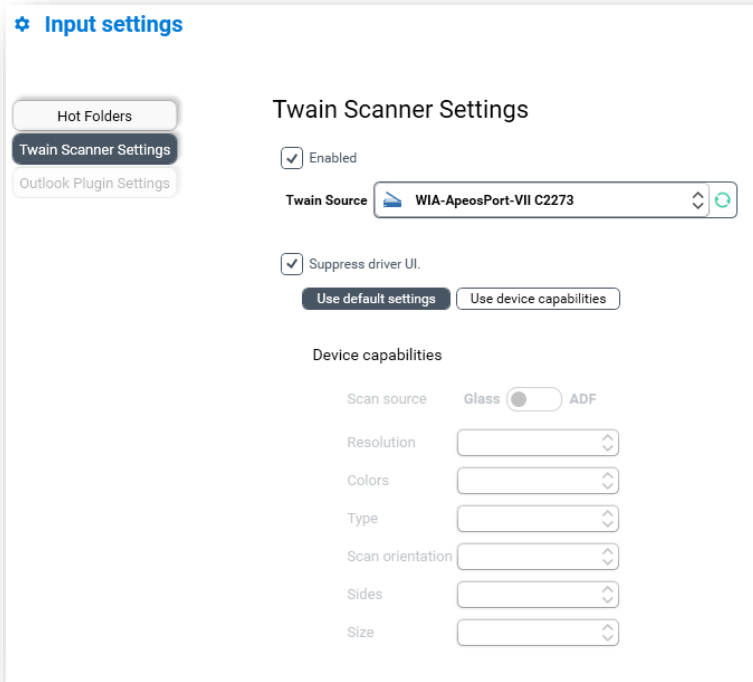
4.1.2. Create additional hot folder

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

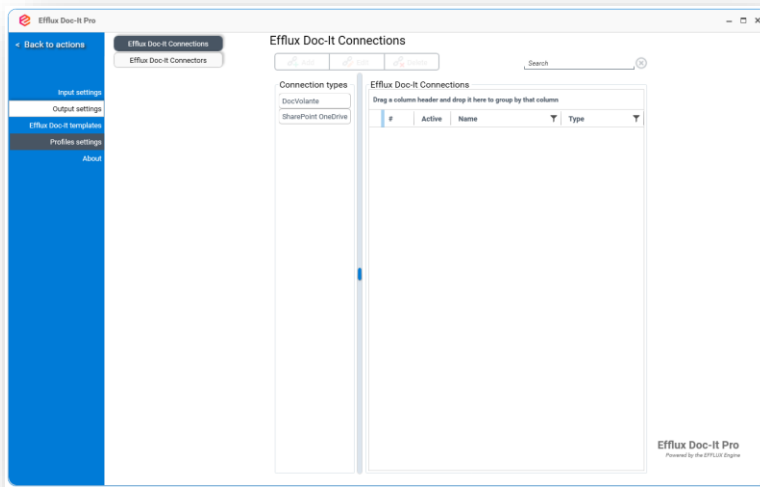
Supress driver UI – activate this option to suppress scanner window. By activating this, these 2 options will be available to choose.

- **Use default settings** – by selecting this option, **Efflux Doc-It Pro** 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 Pro** 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 Pro**.
2. Filter by file name – File with specified name will not be send into **Efflux Doc-It Pro**. Wildcards are allowed in the text area.



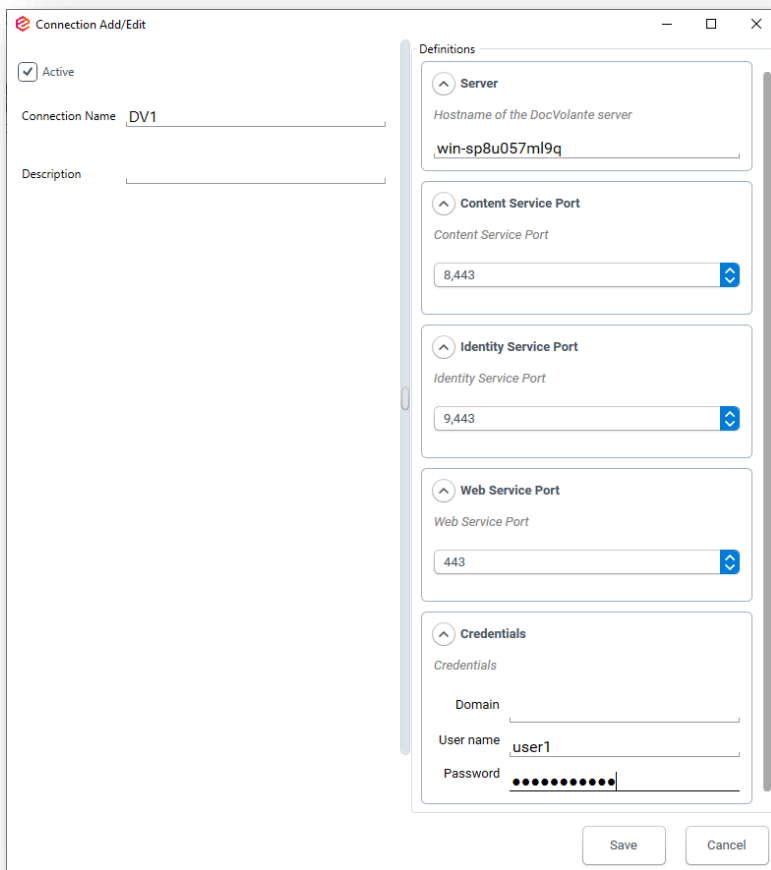
5. Output Settings

5.1. DocVolante Connector

DocVolante Connector is now built in to **Efflux Doc-It Pro**. The integration enables **Efflux Doc-It Pro** to process and upload documents to **DocVolante** server.

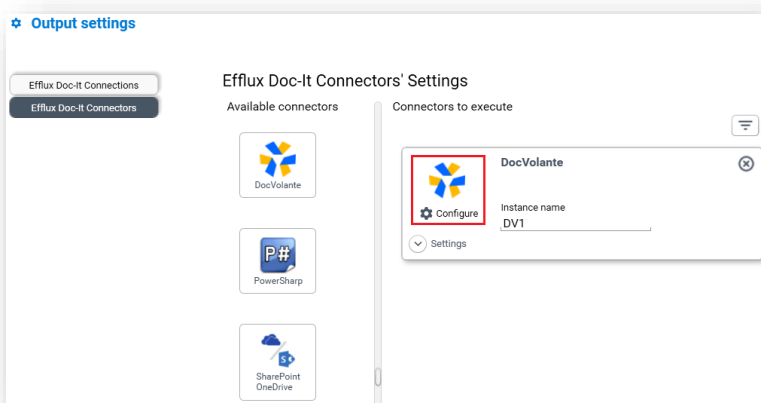
5.1.1. Create DocVolante Connection

1. Go to **Settings** page and select **Output settings**
2. Select **Efflux Doc-It Pro Connections** tab
3. If **Efflux Doc-It Pro** was installed in all users mode, **Efflux Doc-It Pro Connections** is disabled and **Elevate** button is enabled by default. Click **Elevate** button and enter the computer administrator credential to enable **Efflux Doc-It Pro Connections**
4. Under **Connection types**, select **DocVolante**
5. Click **Add** at the top to create a new connection



6. Verify that **Active** checkbox is ticked and type in **Connection Name** and **Description**
7. Under **Server**, type in **DocVolante** server hostname
8. Leave the default value under **Content Service Port**, **Identity Service Port** and **Web Service Port** (unless advised to change)
9. Under **Credentials**, type in **DocVolante** user credentials and click **Save**

5.1.2. Configure DocVolante Connector



1. Go to **Settings** page and select **Output settings**
2. Select **Efflux Doc-It Pro Connectors** tab
3. If **Efflux Doc-It Pro** was installed in all users mode, **Efflux Doc-It Pro Connectors** is disabled and **Elevate** button is enabled by default. Click **Elevate** button and enter the computer administrator credentials to enable **Efflux Doc-It Pro Connectors**
4. Under **Efflux Doc-It Pro Connectors Settings**, drag **DocVolante** icon from **Available connectors** to **Connectors to execute**
5. Type in the name under **Instance name**
6. Click **Configure** to open login page
7. Select appropriate connection and click **Login** button
8. On **DocVolante** configuration window, click 3 dots button to browse and select a folder under **Target folder**

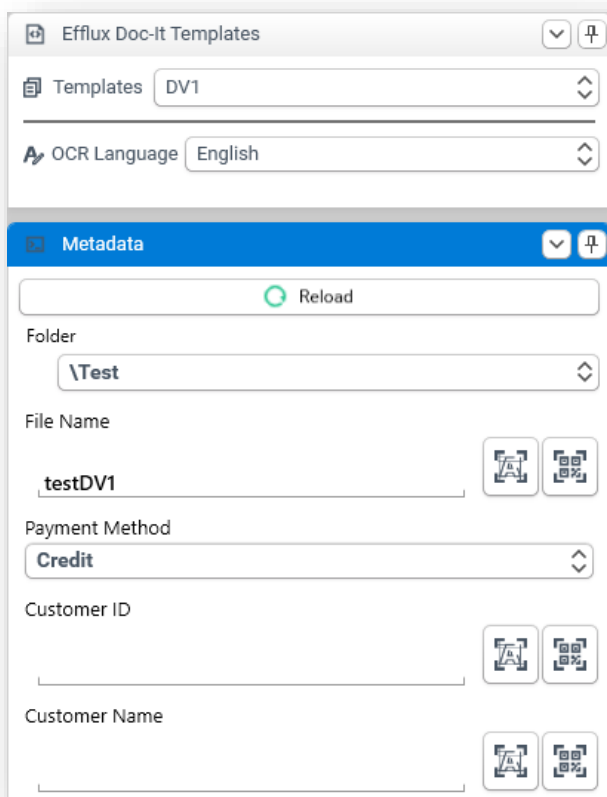
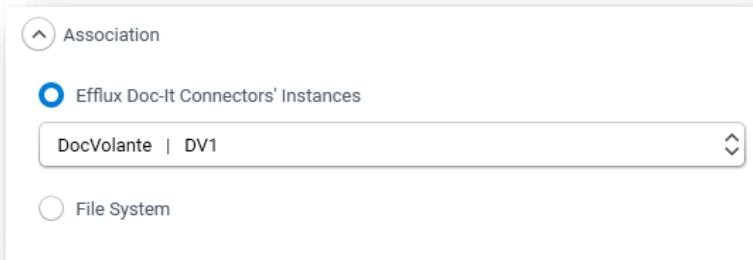
The screenshot shows a dialog box titled "DocVolante" with the following fields and options:

- Target folder:** \Folder 1
- Upload file title:** Test_DV
- Root document type:** Invoice
- Applied document type:** Invoice
- If the destination exists:** Overwrite file (selected), Append to file, Prepend to file, Abort operation
- Field mappings:** A table with two columns: "Field name" and "Value". The rows are "Account Number" and "Amount Due".

*Required

Buttons: OK, Cancel

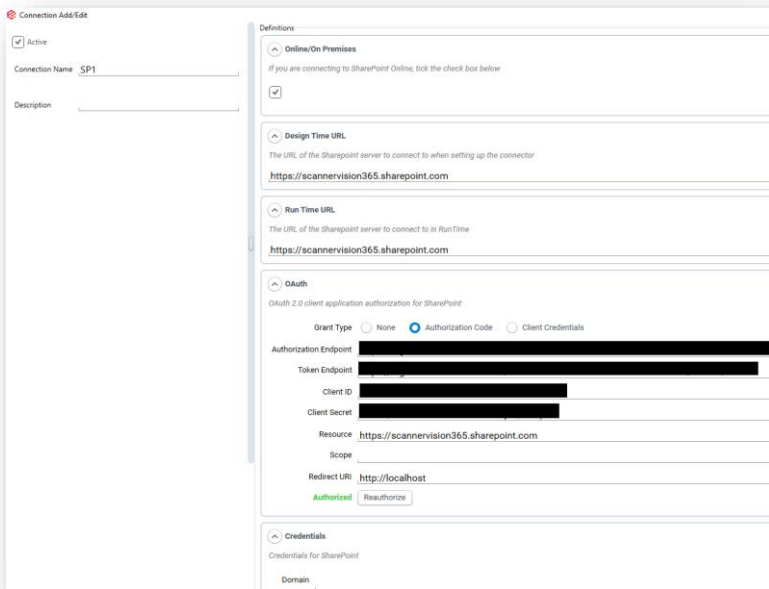
9. Type in file title under **Upload file title**, this will appear later in **Efflux Doc-It Pro** main page under **DocVolante metadata** panel as File Name
10. Select **Root document type**
11. Under **If the destination exists**, select desired action when **Efflux Doc-It Pro** finds out that the same filename already exists in **DocVolante** upload folder
 - a. **Overwrite file** – This option will replace the current existing file
 - b. **Append to file** – This option will add the upload document at the end of the existing file
 - c. **Prepend to file** – This option will add the upload document at the beginning of the existing file
 - d. **Abort operation** – This option will cancel the upload entirely
12. Click **OK** and go back to main page to save the settings



5.1.3. Associate Efflux Doc-It Pro template with DocVolante Connector

1. Go to **Settings** page and select **Efflux Doc-It Pro templates**
2. Under the **Default Template** tab, Leave other options as default
3. Go down and expand the **Association** section
4. Select appropriate **DocVolante Connector Instances**
5. Go back to main page to save the settings

6. On main page, select **Efflux Doc-It Pro Template** associated with **DocVolante Connector**
7. **DocVolante Metadata** fields will appear below
8. **Reload** button use to reload **DocVolante metadata** fields in **Efflux Doc-It Pro**
9. The user should be able to upload the file to any subfolder under the default folder that was configured in the connector. Documents will be upload to default folder if left empty.

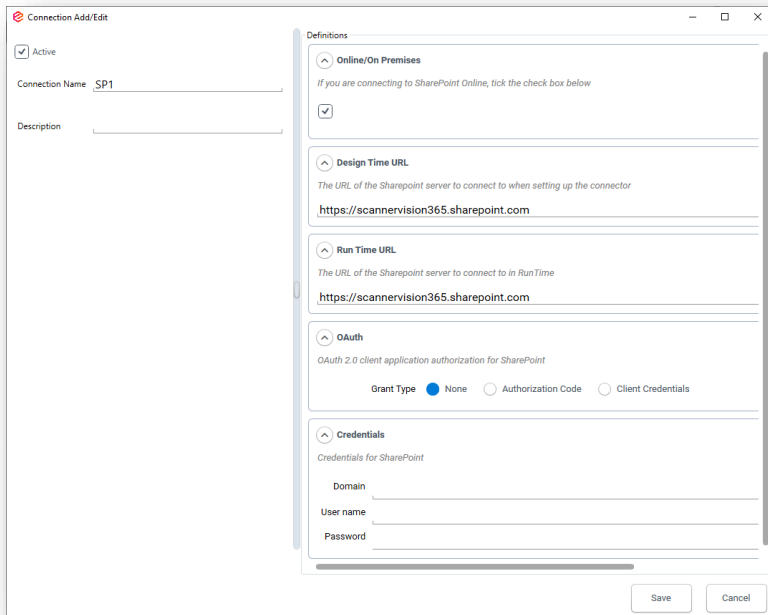


5.3. SharePoint OneDrive Connector

SharePoint OneDrive Connector is now supported in **Efflux Doc-It Pro** with separate installation required.

5.3.1. Create SharePoint OneDrive Connection

1. Go to **Settings** page and select **Output settings**
2. Select **Efflux Doc-It Pro Connections** tab
3. If **Efflux Doc-It Pro** was installed in all users mode, **Efflux Doc-It Pro Connections** is disabled and **Elevate** button is enabled by default. Click **Elevate** button and enter the computer administrator credential to enable **Efflux Doc-It Pro Connections**
4. Under **Connection types**, select **SharePoint OneDrive Connector**
5. Click **Add** at the top to create a new connection
6. Ensure the **Active** checkbox is enabled
7. Give the connection a unique name so it can be identified easily on the connector setup
8. Optional. Give a description for the connection
9. Under **Definitions**, if you are connecting to SharePoint Online, you will need to enable the checkbox. If you are connecting to an On Premise installation of SharePoint, you can leave the checkbox disabled.
! NB: OAuth 2.0 is not available for On Premise installations of SharePoint, only for SharePoint Online.
10. The **Design Time URL** and **Run Time URL** of the SharePoint/OneDrive server needs to be fully qualified, i.e. they must contain the *http://* or *https://* protocol specifier as well as the site if applicable. It is not necessary to include a specific page and extension. For example, in the following URL <https://company365.sharepoint.com/sites/Site name/Shared documents/Forms/AllItems.aspx> only the highlighted section is necessary for the connection.



11. Under OAuth, Grant Type can be set to None, Authorization Code, or Client Credentials.

None makes use of legacy credentials if no OAuth 2.0 is being used.

Authorization Code and **Client Credentials** make use of the new OAuth 2.0 settings

In Microsoft Azure, the Administrator will need to register a new application under App Registrations with Web as the platform. The Redirect URI used should be the one provided by Efflux Doc-It Pro from the screen on the left.

Once the application has been registered, the Application (Client) ID shown on the Overview screen can be copied to the setup in Efflux Doc-It Pro under Client ID.

12. In Azure, select Endpoints to display a list of endpoints for the application. The Authorization endpoint and Token endpoint can be copied over to the corresponding fields in Efflux Doc-It Pro.

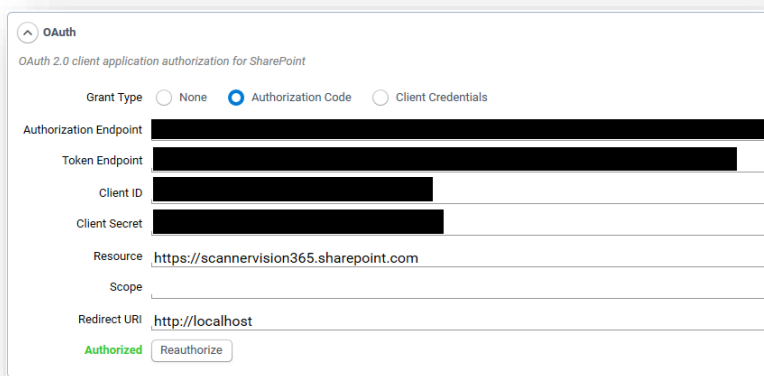
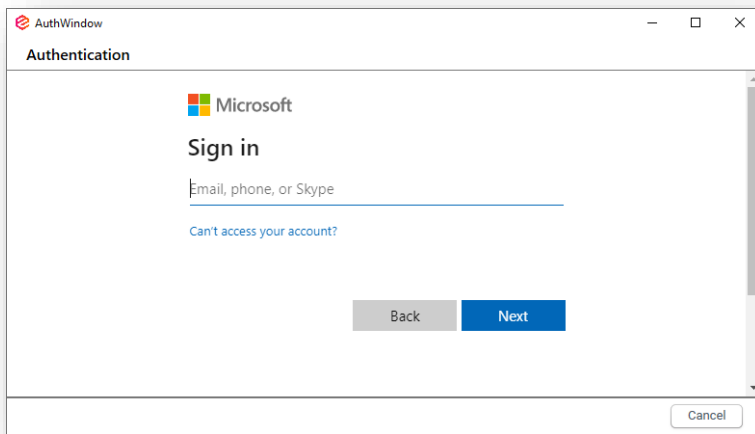
! NB: Only V1 endpoints are required.

Under Certificates & Secrets, a new client secret will need to be created. It is up to the Admin to decide what to call the secret and when it would expire.

! NB: Once created, copy the value of the Value field, NOT the value of the Secret ID, and paste it in the Client Secret field in ScannerVision. This needs to be done while still on the page as the value will be hidden later.

Under API Permissions, select SharePoint with Delegated Permissions. The basic permissions required are AllSites.Read, AllSites.Write, MyFiles.Read and MyFiles.Write.

In the Resource field, simply enter the URL of SharePoint. It is not necessary to use the full URL, simply `https://{tenantname}.sharepoint.com`.

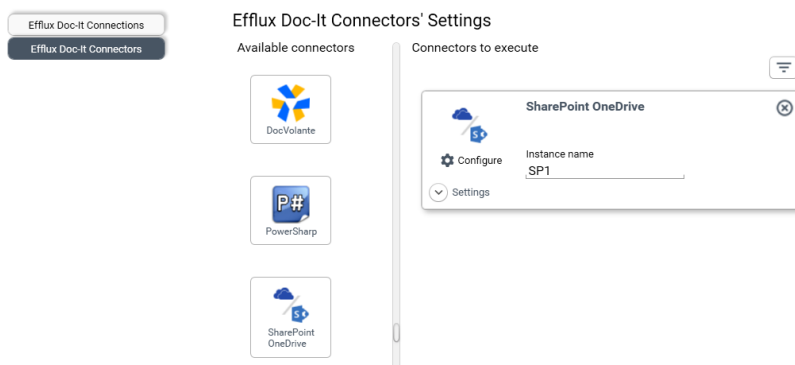


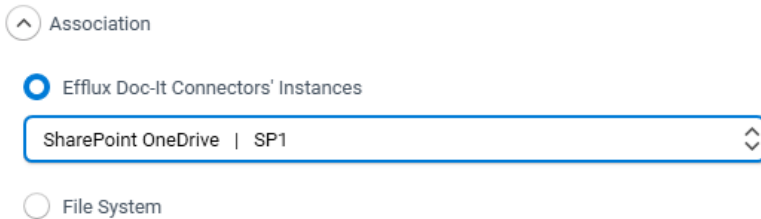
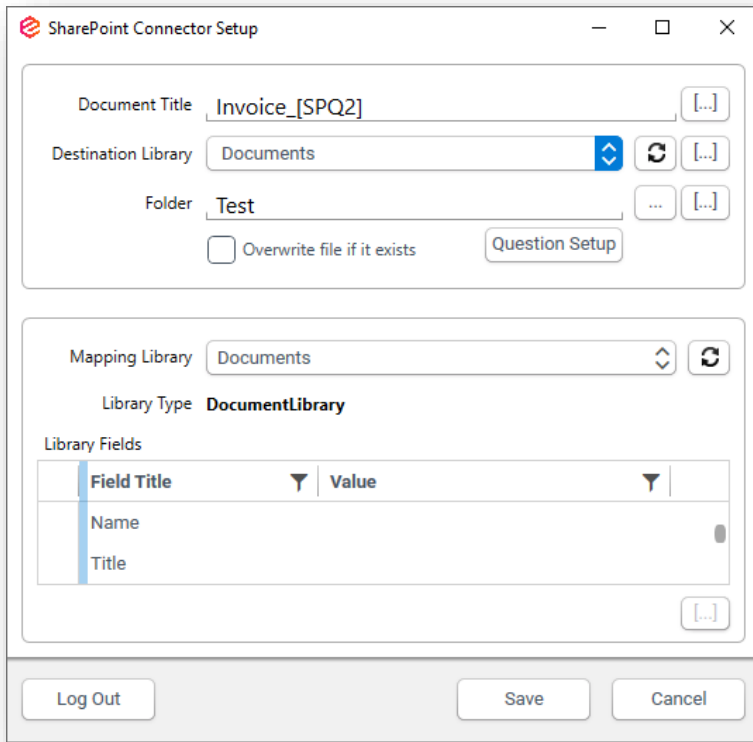
13. If the details for **Authorization Code** has been entered and the Grant Type is switched to **Client Credentials**, the fields will be automatically populated with the necessary information and will not need to be entered again.
14. If Grant Type has been set to **Authorization Code** an **Authorize** button will instead be shown. When clicking on **Authorize**, you will be taken to the login screen for Microsoft to authorize your account. This will include any 2FA that is required by Microsoft. Once you have successfully authorized, you will be taken back to the Configuration window and a message will show **“Authorized”**. The button will have updated to say **Reauthorize**.
15. If Grant Type is set to **Client Credentials**, no login information is required. The Client ID and secret of the app will be used to retrieve a token directly. It is not user specific.
16. Click **Save**

5.3.2. Configure SharePoint OneDrive Connector

1. Go to **Settings** page and select **Output settings**
2. Select **Efflux Doc-It Pro Connectors** tab
3. If **Efflux Doc-It Pro** was installed in all users mode, **Efflux Doc-It Pro Connectors** is disabled and **Elevate** button is enabled by default. Click **Elevate** button and enter the computer administrator credentials to enable **Efflux Doc-It Pro Connectors**
4. Under **Efflux Doc-It Pro Connectors Settings**, drag **SharePoint OneDrive** icon from **Available connectors** to **Connectors to execute**
5. Type in the name under **Instance name**
6. Click **Configure** to open login page
7. Select appropriate **Connection Name** and click **Log In** button
8. On **SharePoint** Connector setup window, enter Document Title.
9. [...] Metadata button can be used to obtain the value answer by

Output settings





10. Select folder in SharePoint from browse button.
11. Tick **Overwrite file if it exists** to overwrite file if the destination exists.
12. Select appropriate **Mapping Library**. User can configure this setting which allows user to determine which properties the document will get by specifying the Value field.
13. Click **Question setup** to configure (refer [5.6](#)) questions for Metadata pane.
14. Click Save and go back to main page to save the settings.

5.3.3. Associate Efflux Doc-It Pro template with SharePoint OneDrive Connector

1. Go to **Settings** page and select **Efflux Doc-It Pro templates**
2. Under the **Default Template** tab, Leave other options as default
3. Go down and expand the **Association** section
4. Under **Efflux Doc-It Pro Connectors' Instances**, select appropriate **SharePoint** OneDrive Connector Instances
5. Go back to main page to save the settings
6. On main page, select **Efflux Doc-It Pro Template** associated with **SharePoint OneDrive** Connector
7. **DocVolante Metadata** fields will appear below
8. **Reload** button use to reload **SharePoint OneDrive metadata** fields in **Efflux Doc-It Pro**

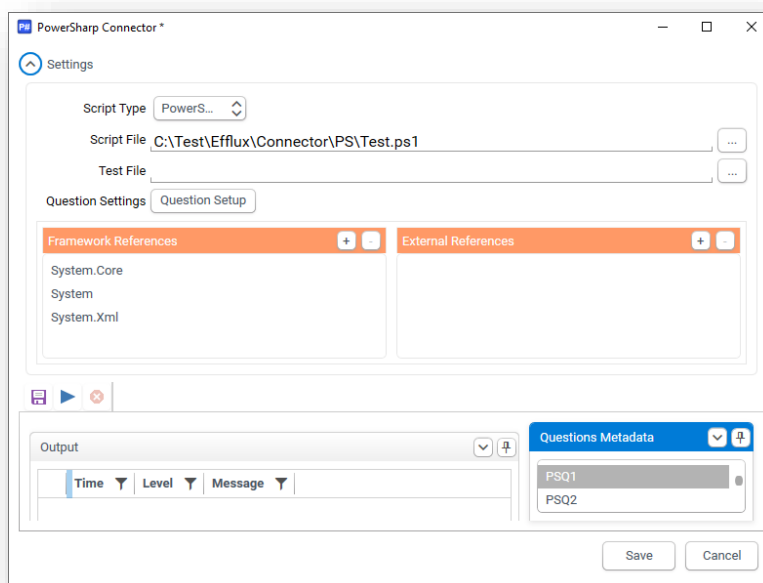
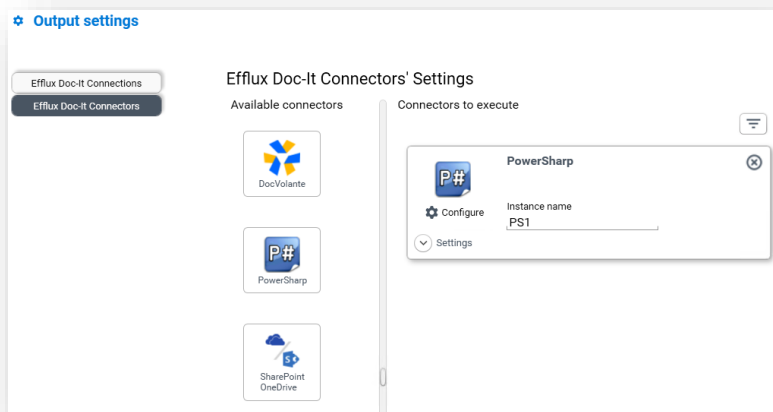
The user should be able to upload the file to any subfolder under the default folder that was configured in the connector. Documents will be upload to default folder if left empty.

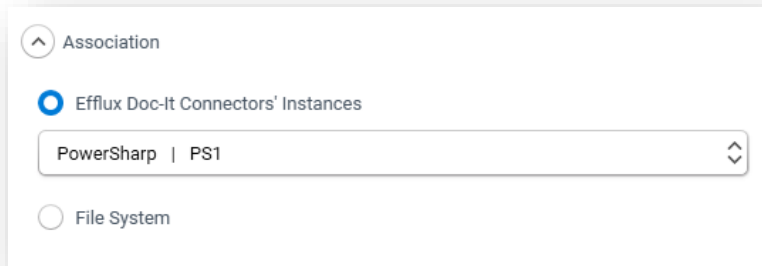
5.3. PowerSharp Connector

PowerSharp Connector is now supported in **Efflux Doc-It Pro** with separate installation required. The PowerSharp Connector allows you to execute Microsoft C# or PowerShell code.

5.3.1. Configure PowerSharp Connectors

1. Go to **Settings** page and select **Output settings**
2. Select **Efflux Doc-It Pro Connectors** tab
3. If **Efflux Doc-It Pro** was installed in all users mode, **Efflux Doc-It Pro Connectors** is disabled and **Elevate** button is enabled by default. Click **Elevate** button and enter the computer administrator credentials to enable **Efflux Doc-It Pro Connectors**
4. Under **Efflux Doc-It Pro Connectors Settings**, drag **PowerSharp** icon from **Available connectors** to **Connectors to execute**
5. Type in the name under **Instance name**
6. Click **Configure** to open the connector settings window
7. Under Settings section, choose **Script Type** to execute
8. Browse and select script file. The code will be loaded in script editor. To view script editor, click icon **^** beside the Settings or maximize **PowerSharp Connector** window
9. Select **Test File** to test the file against the script
10. Click **Question list** to configure (refer [5.6](#)) questions for Metadata pane.
11. Click **Save** and go back to main page to save the settings.



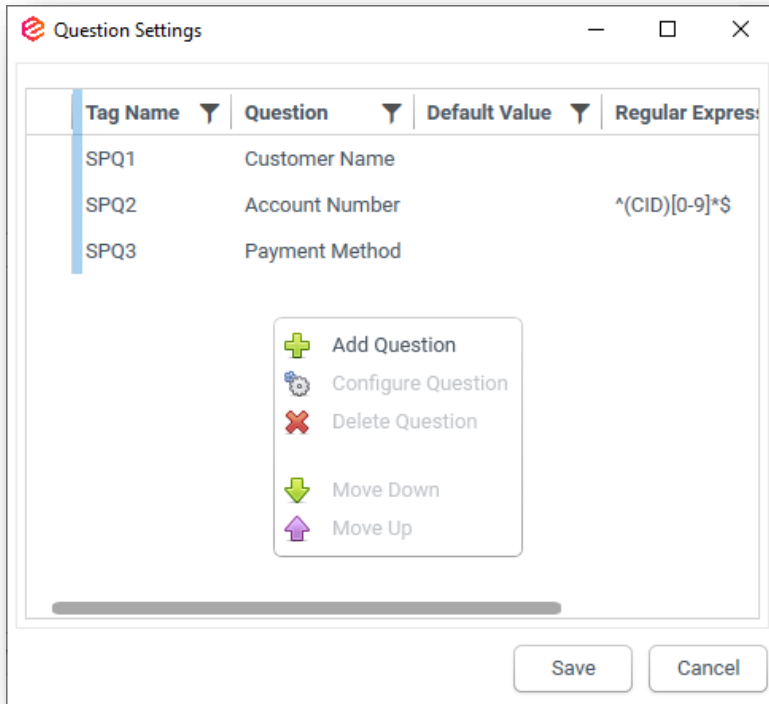


5.4.2. Associate Efflux Doc-It Pro template with PowerSharp Connector

1. Go to **Settings** page and select **Efflux Doc-It Pro templates**
2. Under the **Default Template** tab, Leave other options as default
3. Go down and expand the **Association** section
4. Select appropriate **PowerSharp Connector** Instances
5. Go back to main page to save the settings
6. On main page, select **Efflux Doc-It Pro Template** associated with **PowerSharp Connector**
7. **PowerSharp Metadata** fields will appear below
8. **Reload** button use to reload **Metadata** pane in **Efflux Doc-It Pro**

The user should be able to upload the file to any subfolder under the default folder that was configured in the connector. Documents will be upload to default folder if left empty

5.6. Question Settings

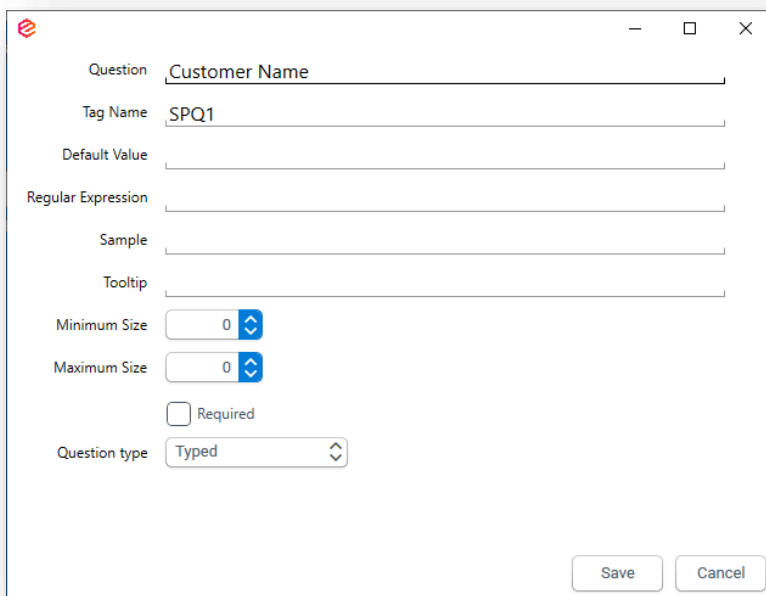


SharePoint and **PowerSharp Connector** support **Question Settings** configuration. These configured questions will appear in Metadata pane when user choose specific template. The description for each function as below.

- Add question** - Adds a question to the connector
- Configure question** - Configures an existing question.
- Move down** - Moves the selected question down.
- Move up** - Moves the selected question up.

When adding a question, there are several requirements that need to be entered to make the question and capturing data more accurate: -

- Question** (Required) - Question that is displayed to the user on the **aiVika**.
- Tag name** (Required) - The metadata tag name by which this information is identified in the connector.
- Default** (Optional) - The default answer to the question if the user does not provide one. The user will see this value in the respective edit field on the **aiVika**.
- Regular expression** (Optional) - The data that is entered by the user can be validated by specifying a Regular Expression. **aiVika** will try to find a match for the provided regular expression in the data that is entered by the user. By providing a regular expression, the quality and/or correctness of the captured information can be improved which if left unverified could potentially lead to



Minimum Size

Maximum Size

Required

Question type Typed

- Typed
- Typed & Selected
- Selected
- Browse

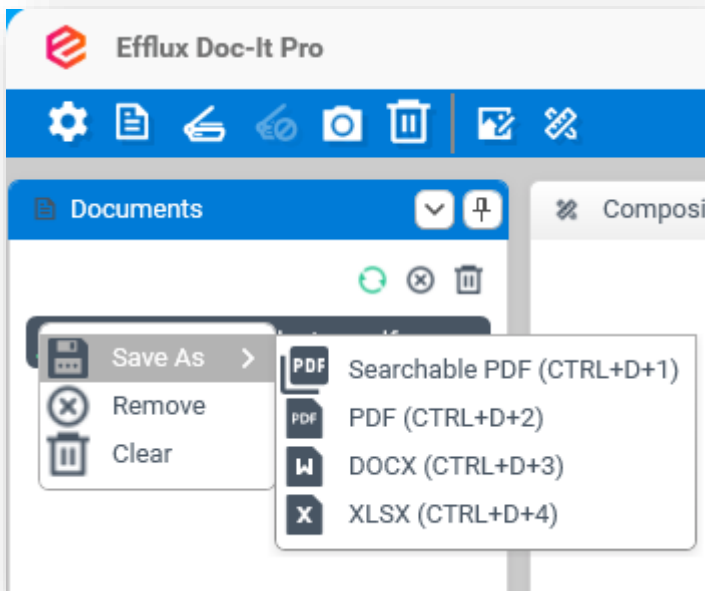
- problems later during the processing of the document.
- i. **Sample** (Optional) - The sample value you specify here is included in the message to show the user what the expected format of the data is.
 - j. **Tooltip** (Optional) - A short description of the question will appear when the user hovers the mouse pointer over the question.
 - k. **Minimum size** (Required) - The minimum number of characters that must be entered by the user.
 - l. **Maximum size** (Required) - The maximum number of characters that can be entered by the user.
 - m. **Required** (Optional) - Indicates that the question is required to be filled in by the user.
 - n. **Question type** (Required) - This selection determines what options the user has for entering information on the client.
 - **Typed** - The user is required to manually type in a value.
 - **Typed & Selected** - The user has the option to either type in a value or to select a value from a drop-down list.
 - **Selected** - The user is required to select a value from a drop-down list.
 - **Browse** - The user is required to browse and select a folder. The folder path needs to be specified in the **Default. Network shared folder** also supported.

6. Optical Character Recognition

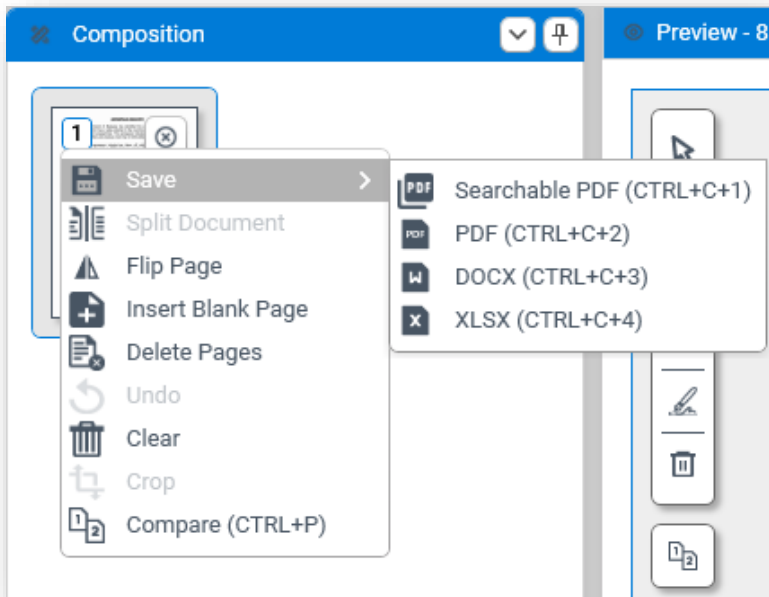
Efflux Doc-It Pro contains the new **Ubunye** OCR engine (**EFFLUX Engine**) which enables document processing before it uploads to **Efflux Connector** or **File System folder**.

6.1. Converting File to Other Formats

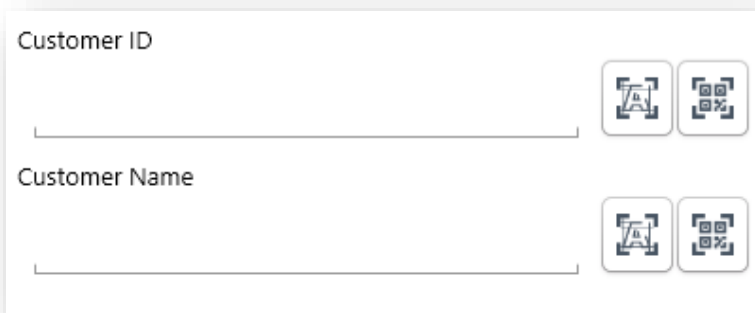
1. Load a document into **Efflux Doc-It Pro**
2. In the **Documents** panel, right click the file and hover to **Save As**
3. Select desired file format
4. Choose a filename and location to save in the Save dialog box
5. Click **Save** to start the conversion



6. Below message will appear when the task complete



7. The Save as menu also available in Composition panel



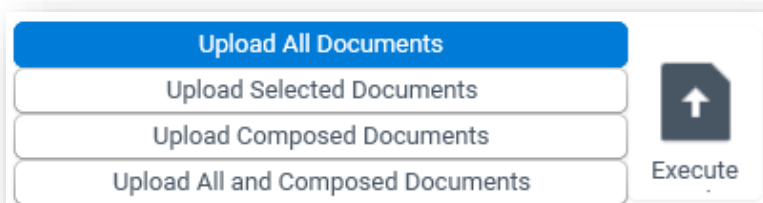
6.2. Zone OCR and Barcode Reader

Once the **Efflux Doc-It Pro** template has been configured, the Zone OCR and barcode reader button are now available to use.

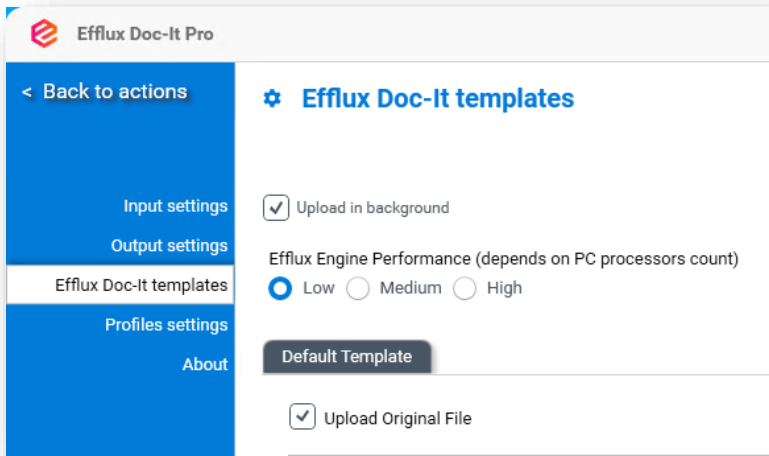
To use the Zone OCR and Barcode reader,

1. Go to **Preview** panel
2. Draw a region anywhere within the document page
3. Click **Zone OCR** button to read a zone with text
4. Or click **Barcode reader** to read zone with barcode

6.3. Upload File to Connector or File System



1. Load a file in **Efflux Doc-It Pro**
2. Select the file in in **Documents** panel
3. In **Efflux Doc-It Pro templates** panel, select appropriate template
4. Answer **ScannerVision questions** or **DocVolante metadata** fields
5. Select the appropriate Upload button and click **Execute**



7. Efflux Doc-It Pro Template

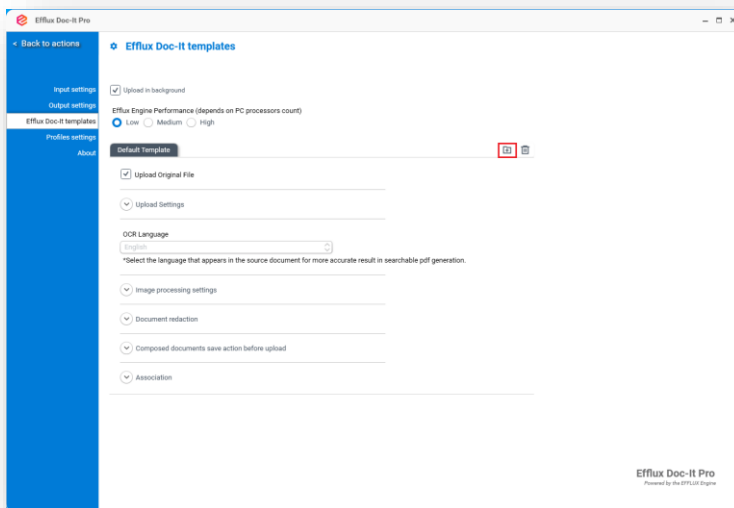
In **Efflux Doc-It Pro Template**, enabling **Upload in background** will allow user to do other tasks within **Efflux Doc-It Pro** while uploading documents in the background.

Users can choose variation of **Efflux Engine Performance** options to suite the need. Choosing higher performance will require more processor core. However, **High** option will be disabled if a machine only has 4 processors since available processor count is set to 3 (processor count - 1)

Low = 1 thread
Medium = 2 threads
High = 4 threads

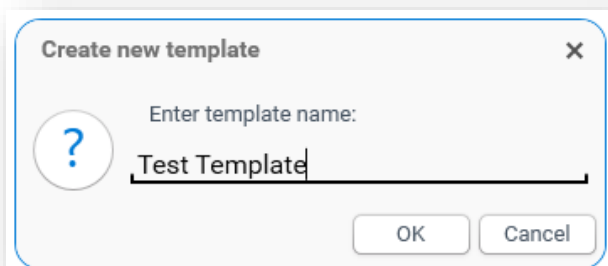
To associate more connectors to the template, additional templates can be added.

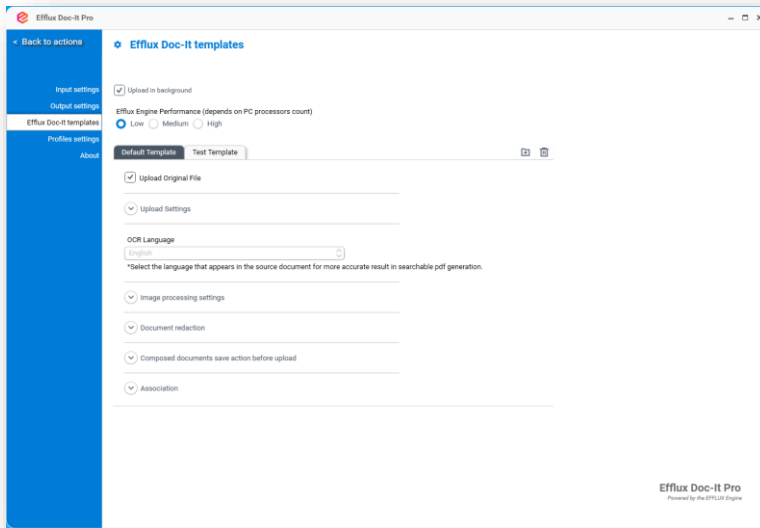
7.1. Create Additional Template



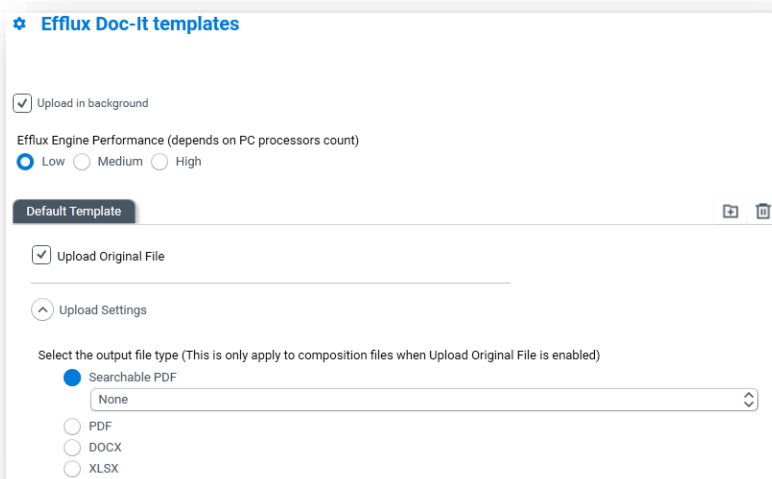
1. Go to **Settings** page and select **Efflux Doc-It Pro templates**
2. In the same row as **Default Template** tab, click Add button

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





4. Associate the **DocVolante** connector or **File System** server to this new template
5. Go back to main page to save the settings



7.2. Upload Settings

In **Efflux Doc-It Pro template** settings, uploaded documents can be converted to other formats. Supported format as below.

- **Searchable PDF** (also supported in **PDF/A-2B**, **PDF/A-2U**, **PDF/A-3B** and **PDF/A-3U** format)
- **PDF**
- **DOCX** (Microsoft Office Word)
- **XLSX** (Microsoft Office Excel)

1. Go to **Settings** page and select **Efflux Doc-It Pro templates**
2. Under the **Default Template** tab, Untick **Upload Original File** to enable OCR and image processing
3. Expand **Upload Settings**, output file type is now enabled
4. Select the appropriate file type
5. Go back to main page to save the settings

When upload is complete, automatically clear

- Answered template questions
- Loaded/scanned documents

Upload Options

- Automatically delete documents that have been uploaded
- Hide upload screen

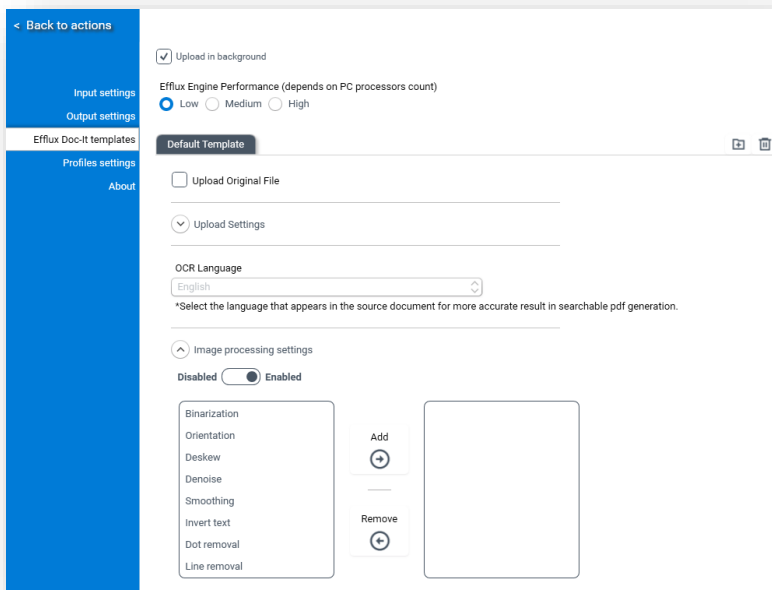
Other options under **Upload Settings** includes.

Answered template question – This option, when enabled will clear all value in questions and metadata fields in **Efflux Doc-It Pro** when upload is complete
Loaded/scanned documents – This option, when enabled will clear loaded or scanned document when upload is complete

Automatically delete document that have been uploaded – This option, when enabled will delete the loaded documents permanently from the computer when upload is complete.

! CAUTION: This option will be disable if **Upload Original File** is unticked.

Hide upload screen – This option, when enabled will hide upload progress window in **Efflux Doc-It Pro** when upload is complete



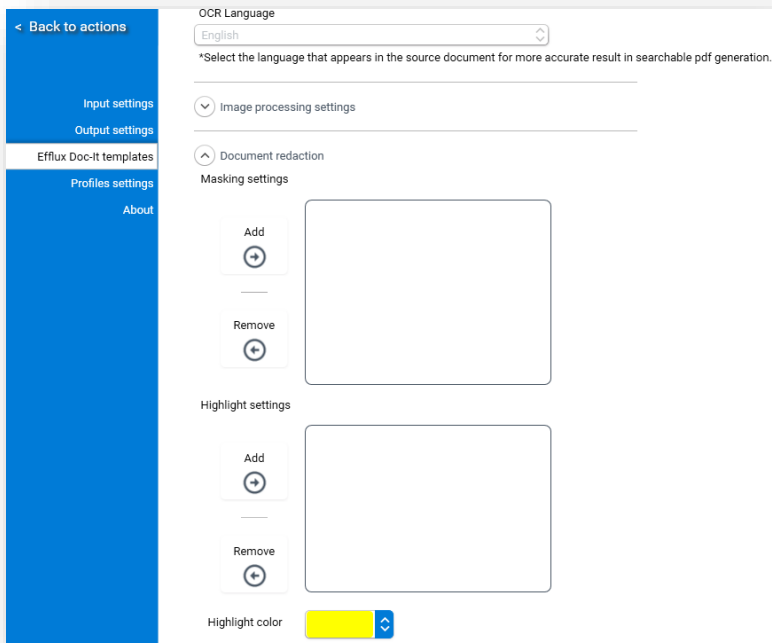
7.3. Image Processing Settings

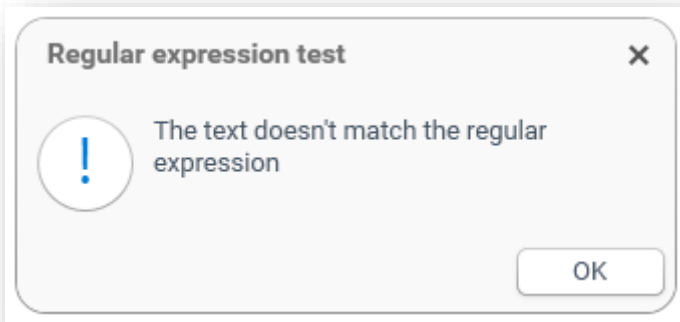
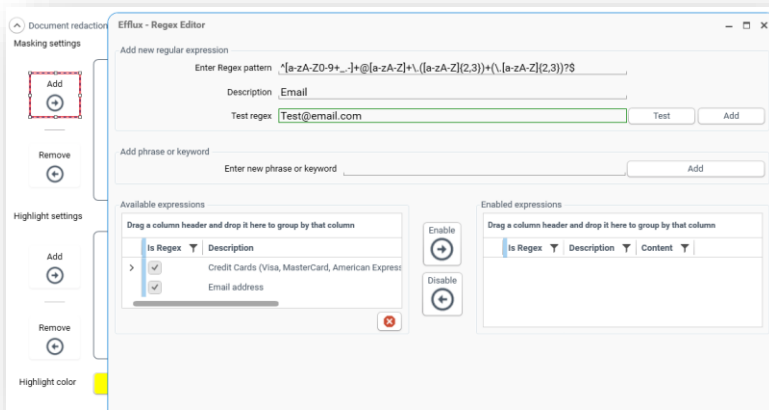
Apart from converting documents, **Efflux Doc-It Pro** can also perform image processing before it uploads the document.

1. Go to **Settings** page and select **Efflux Doc-It Pro templates**
2. Under the **Default Template** tab, Untick **Upload Original File**
3. Expand **Image processing settings**, toggle left or right to enable or disable the feature
4. Once enabled, select desired image processing task on the left, then click **Add** button
5. To remove the task, select task on the right and click **Remove** button
6. Multiple image processing tasks also supported
7. Go back to main page to save the settings

7.4. Document Redaction

Document redaction settings in **Efflux Doc-It Pro** allows word masking and highlighting within the document. Regular expressions (RegEx) and key word matching are supported in this feature.

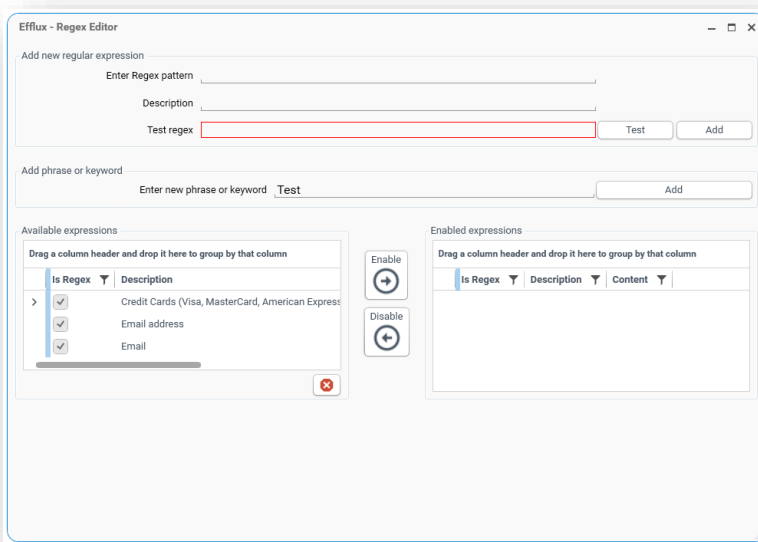




7.4.1. Adding new regex

Add new regular expression: -

1. Click **Add** to open the editor
2. Enter Regex pattern and description
3. To test the regex, click **Test** button
4. If the regex doesn't match, the **Test regex** field outline will turn to red, and an error message will be thrown
5. If regex does match, the **Test regex** field outline will turn to green
6. Click **Add** button next to the **Test regex** field to add this newly created regex to the list of **Available Expressions**
7. Select the new regex and click button **Enable** to enable it. It will be added to the **Enabled Expressions** list
8. Close the editor and return to main screen to start using the feature.



7.4.2. Adding new phrase

Add new phrase or keyword: -

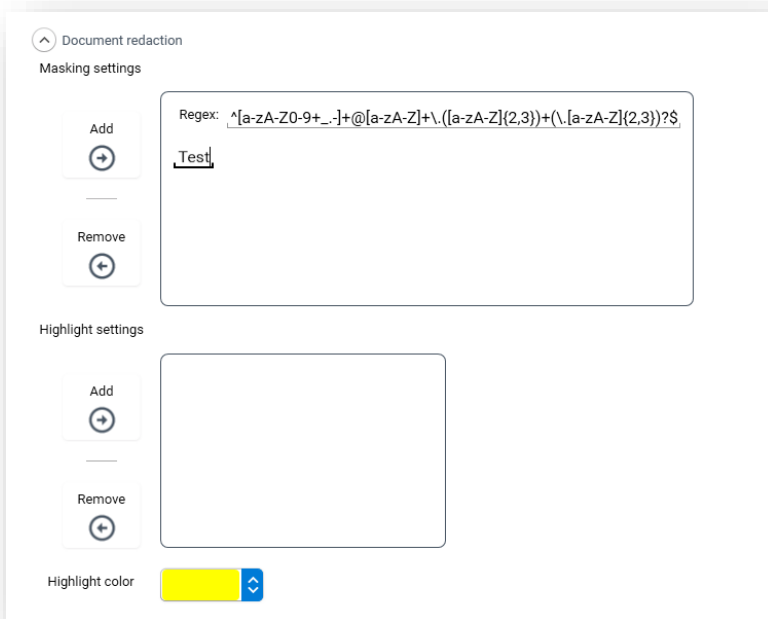
1. Click **Add** to open the editor
2. Enter the desire phrase and then click **Add**
3. The phrase will now add to the list of **Available Expressions**
4. Select the phrase and click **Enable** to enable it. It will be added to the **Enabled Expressions** list.
5. Close the editor and return to main screen to start using the feature.

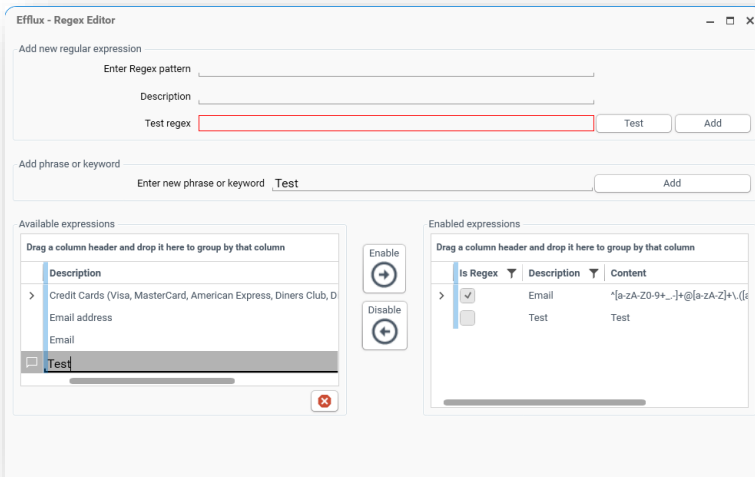
To preview the result of Document Redaction, click button **Compare** in preview panel on the main screen. See [3.5.2](#).

7.4.3. Modifying regex or phrase

Modify the regex or phrase: -

1. Editing the regex can be done directly from Document redaction settings section under the **Efflux Doc-It Pro template** page **or**



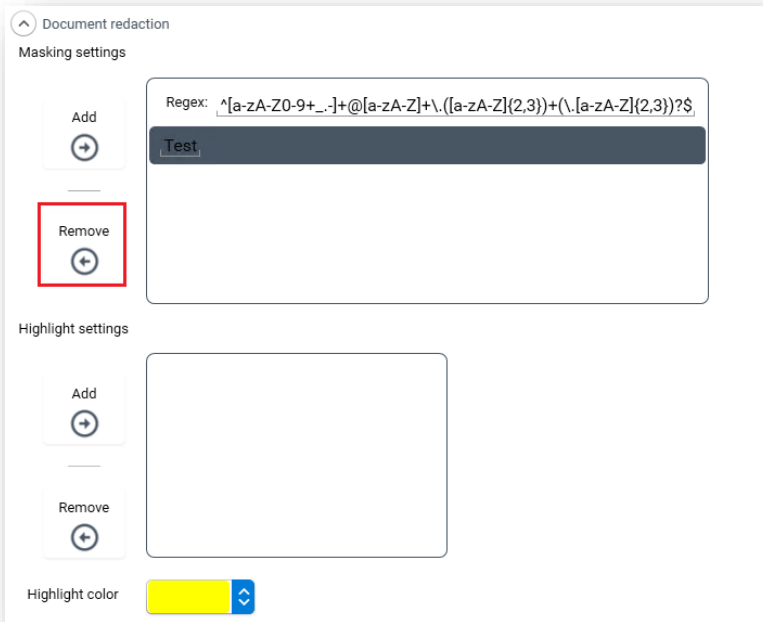


2. It also can be done from the **Regex Editor** in both Available and Enabled expressions list

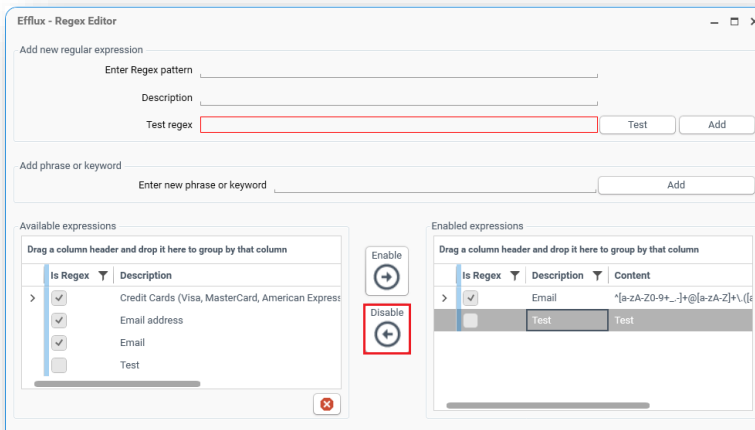
7.4.4. Disabling regex or phrase

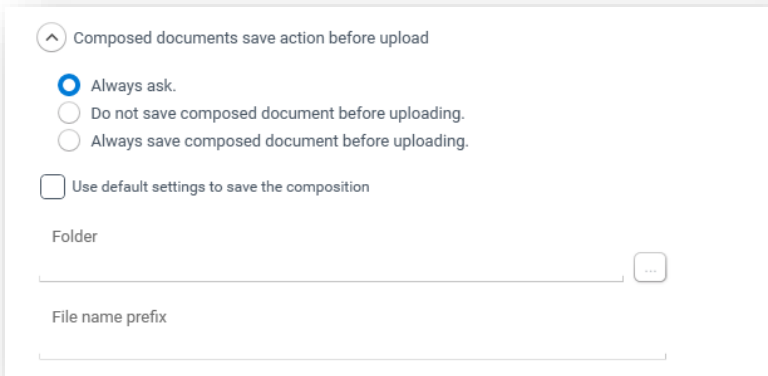
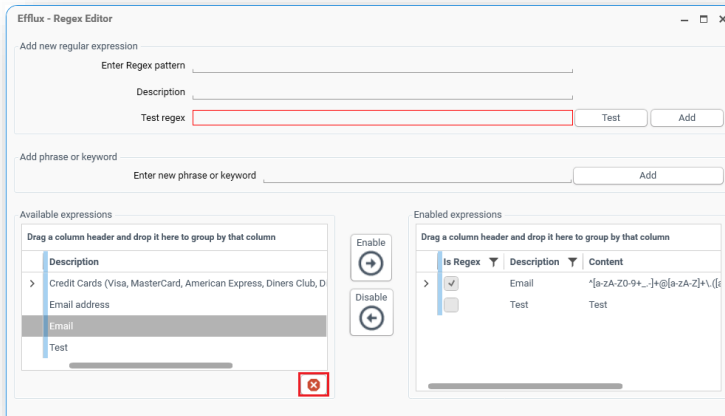
Disabling the regex or phrase: -

1. The regex or phrase can be disabled directly from the Document redaction settings section **or**



2. from the editor (Open the editor window by clicking **Add** button).





7.4.5. Deleting regex or phrase

Delete Regex from Available expressions list: -

1. Open Regex Editor
2. Go **Available expressions** list
3. Select a regex that need to be deleted
4. Click on **X** icon under the list

7.5. Composition Save Action

Efflux Doc-It Pro can automate saving files in the composition panel. Available options as listed below:

1. **Always ask – Efflux Doc-It Pro** will always ask whether it should or should not save a composition before uploading or saving it
2. **Do not save composed document before uploading – Efflux Doc-It Pro** will not save composed document
3. **Always save composed document before uploading – Efflux Doc-It Pro** will always try to save the composed document uploading or saving it

Other options available under **Composed documents save action before upload** includes:

4. **Use default settings to save the composition** – When enabled, the two options below will be available.
 - **Folder** – Browse and select a directory for saving location
 - **File name prefix** – This prefix will be added at the beginning of randomly generated composition file name

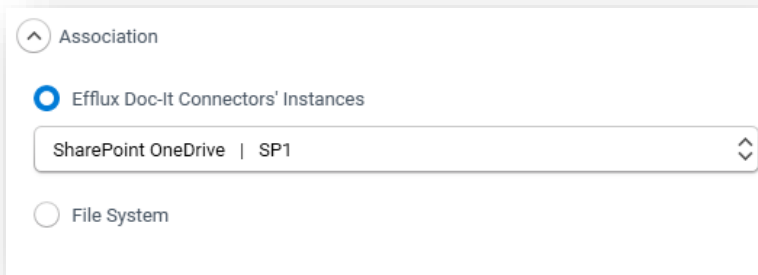
Efflux Doc-It Pro will automatically save the composition according to the settings specified above.

7.6. Association

This setting is to associate the template with **Efflux Doc-It Pro** connectors or File System. The template can be selected in the **Efflux Doc-It Pro** template panel in the main page.

7.6.1. Efflux Doc-It Pro Connectors' Instances

1. Make sure **Efflux Doc-It Pro connector** in **Output settings** is configured
2. Go to **Efflux Doc-It Pro templates**
3. Expand **Association**
4. Tick **Efflux Doc-It Pro Connectors' Instances**
5. Select appropriate connector instance from drop down list
6. Go back to main page to save the settings
7. Connector metadata will appear in **Metadata** panel after appropriate template is selected



Association

Efflux Doc-It Connectors' Instances

File System

Folder
\\192.168.0.135\Efflux

User name
shared1

Password
●●●●●●●●

If destination exists

Overwrite Save With Index Abort Operation

7.6.2. File System

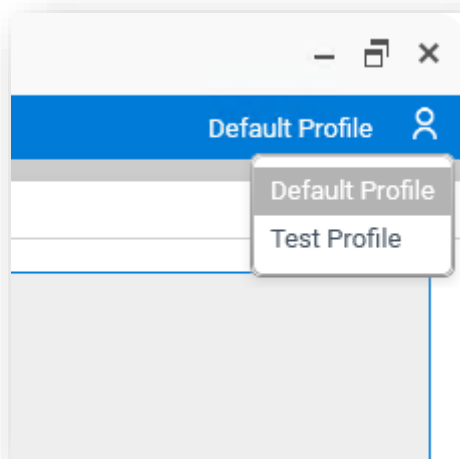
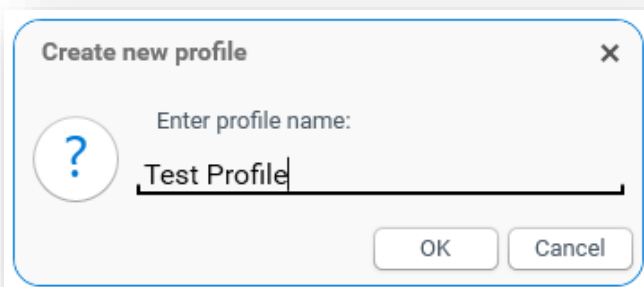
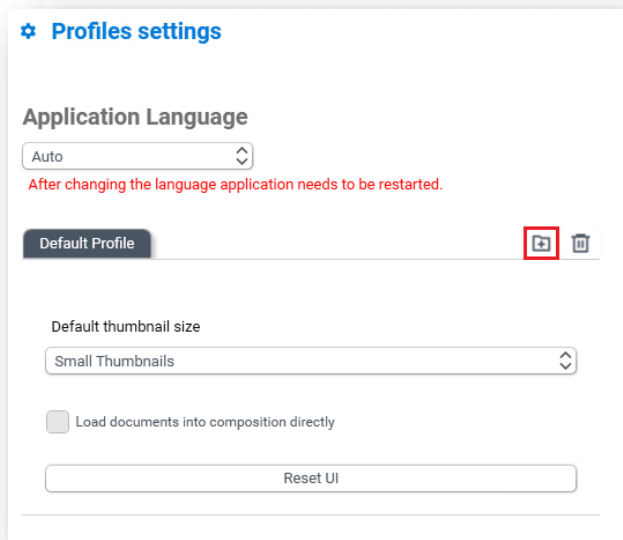
1. Go to **Efflux Doc-It Pro templates**
2. Select a template that needs to be associated with File System and expand **Association**
3. Tick **File System**
4. Select appropriate folder by clicking button in **Folder** field to store the output of the processed documents. It also supports path on **network shared folder**. **Username** and **Password** field will appear if user enter a network path.
5. Under **If destination exist**, select what should happen if the similar filename exists in the output folder
 - **Overwrite** – **Efflux Doc-It Pro** will overwrite the existing file
 - **Save With Index** – **Efflux Doc-It Pro** will proceed to store the file with addition of index after filename. E.g
Filename(1).pdf,
filename(2).pdf
 - **Abort Operation** – **Efflux Doc-It Pro** will cancel the process
6. Go back to main page to save the settings
7. Select the template associated with File System
8. The **Subfolder** dropdown will list all available subfolders in the specified folder.

8. Profile settings

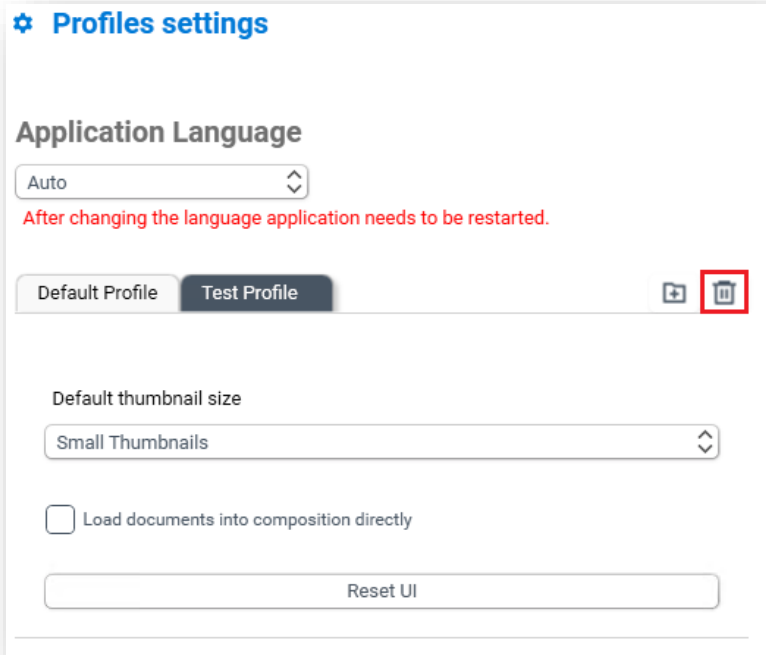
Profile allows the use of multiple settings of screen layout and the look and feel of **Efflux Doc-It Pro**. Profiles contain 4 different settings.

1. **Application Language** – This setting allows user to change the **Efflux Doc-It Pro** language to the desire language. This setting requires **Efflux Doc-It Pro** to restart for it to be applied.
2. **Default composition save location** – This option is used to set a default saving location for the composition. When this is enabled, **efflux Doc-It Pro** will open a save dialog box under the specified location when saving or uploading a composition.
3. **Default thumbnail size** – This option is used to set default thumbnail size for that profile
4. **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.
5. **Reset UI** – This button is used to reset layout changes in **Efflux Doc-It Pro** files. After reset, original default layout will be loaded again

8.1. 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 Pro**



8.2. 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

