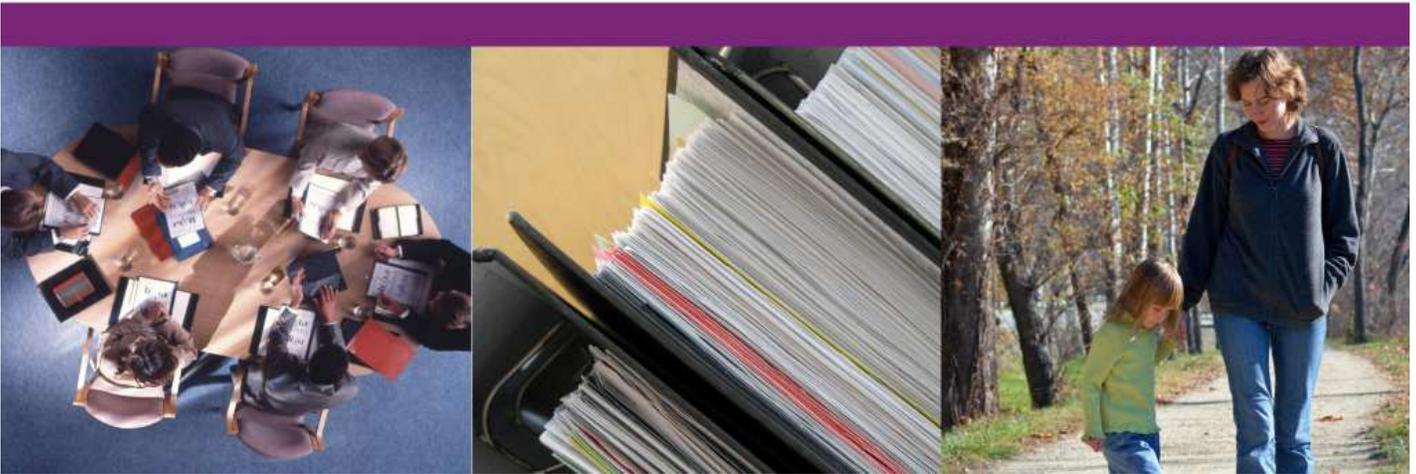


# efact

*Paperless Office!*



## User Manual

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# I. Welcome

## 1. Project History

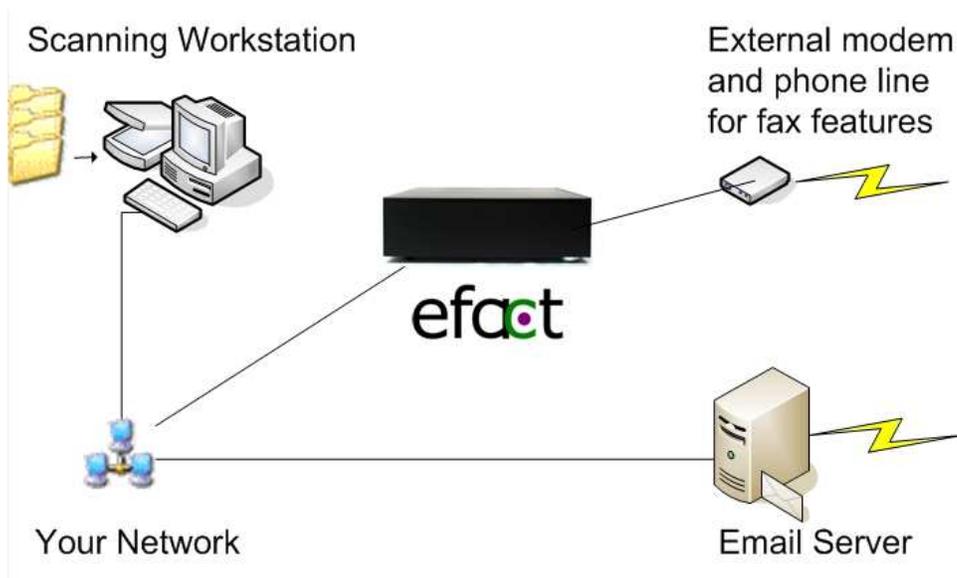
The **efact** project started because existing scanning solutions didn't work, were too complicated, too expensive, and weren't appropriate for what real estate conveyancers needed. We decided to make a product that was affordable, simple, powerful, and unlimited.

Soon, as people heard about how easy it was to go paperless with our real estate product, we created new customized versions of the **efact** for other industries.

We are also committed to the appliance idea – the **efact** is a plug-and-play, single purpose appliance with simplified management. The core reason for this is that our clients need **efact** to be a complete, efficient solution. **efact** users will never need to upgrade or buy new servers in order to use **efact**, or redesign their network backup solution to fit more data, or worry about whether document management software will slow down their existing server. Instead, we sell a complete package with custom hardware and software.

## 2. efact Overview

Below is a quick diagram of how an efact integrates with your network. The scanning workstations and clients access the efact over the network. For fax sending support, an external modem can be connected to the efact – this will also require a telephone line. In order to send mail, the efact also connects over the network to your mail server (or an external mail server run by your ISP, if an internal mail server is not available).



There are only two ways to access the efact. The first is with a web browser – the browser-based interface will allow you to access virtually all of the efact's functions. The other is with our custom scanning software, efactScan – efactScan is used only for scanning.

## II. Scanning

### Strategies for Success

The **efact** appliance was designed for your business process process, but there is more to a successful scanning strategy than just an appliance. The following is some information about how to scan effectively.

#### 1. Having a good work area for your scanning workstation

It is vital when integrating scanning with your business that your scanning workstation is well thought out. Make sure there is plenty of room for sorting and stacking files. A nice tabletop surface for the scanner to also sit on is also vital, and of course a fast PC itself will allow you to process scanned files faster. Particularly with high-speed scanners, a high-end PC will allow the process to go much faster.

#### 2. Integrating scanning in business processes

The most successful **efact** implementations are ones where the **efact** becomes a part of your business process. Often if you scan a document during your business transactions, the **efact**'s ability to email, fax, and manage that document will help you finish your business faster.

#### 3. Scanner maintenance

It is important to keep your scanner as clean and dust-free as possible. Also, make sure not to run staples through a scanner, this is one of the easiest ways to damage the scanner and often manufacturers will not warranty against scratches from staples or paperclips.

#### 4. Using **efactScan**

**efactScan** is the **efact**'s custom scanning interface. To use it:

1. Double-click the **efactScan** icon on your desktop.
2. Go to "file", then "Select TWAIN source" and choose your scanner
3. click the "Scan" button
4. Choose your scanning settings (See section below)
5. When the file has finished scanning, fill out the indexing window with the borrower name, closing date, etc.
6. Click "save" and the file will be saved to the **efact**

*Special Technical Note: The scanning workstation requires that the Z: network drive be connected successfully to a share on the **efact**. If you do not see two folders inside*

*your Z: drive called "Settings" and "Extras", please contact technical support and we will help you fix the Z: drive mapping.*

## 5. Scanning settings

For general-purpose scanning, we recommend black and white scanning at 200dpi, with page size detection and deskew. Other types of smoothing, margin removal, and filtering can also help depending on paper type. Also, double feed detection can be very helpful in detecting and stopping the process if the scanner ever grabs two pieces of paper at once. Remember that the more processing that is done on each scanned document will require more processing power and memory on your scanning workstation. In the case of high-end scanners, this can slow down the scanning process significantly.

## III. Importing Files

### 1. Drag-and-drop import

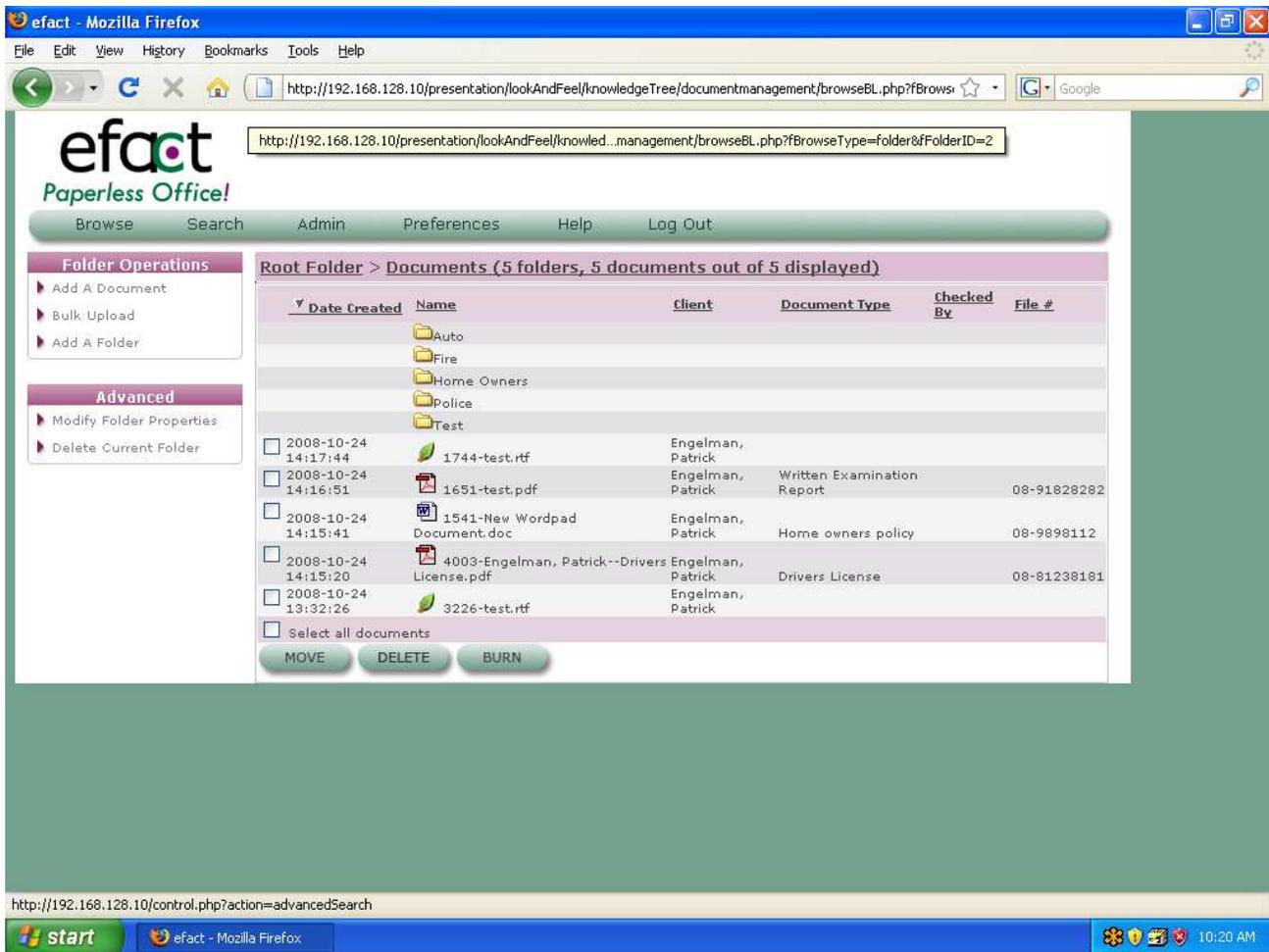
If you simply drag and drop a file or a collection of files onto the efactscan icon on your desktop, you will be asked to index each of the files individually and they will be added to the efact in their existing format. This is useful for Microsoft™ Word documents, Excel sheets, and other common document types that you want to import directly into the efact without converting to PDF.

The efact also creates a "send to" option, allowing you to right-click on any file in Explorer and choose "send to -> efact". The file will then be imported into efact.

## IV. Retrieval

### Finding and working with your stored documents

Most of efact's functionality is extremely simple to use – particularly searching for documents and working with those documents is very easy using our web interface (pictured below).



## 1. Using eFact email

eFact email is the eFact system's integrated print-to-email extension. Print to email allows you to select a range of pages in a scanned .pdf document and email only those pages. eFact email creates a new PDF with only the pages you selected, and emails that immediately through your usual mail client (Microsoft Outlook and Outlook Express are both supported).

## 2. Burning CDs

In order to burn a cd, you first need to insert a **blank** cd into the eFact's dvd drive. Then, choose the document in the retrieval interface and click on the "cdburn" button, the document will be burned to the CD and will be automatically ejected when finished.

The eFact also allows for you to burn on your local computer. In order for this to work, you need a cd burner on your local computer and burning software that supports burning .ISO image files (such as Roxio or Nero). In order to make

this automatic, just set up a file association with .ISO files for whichever program you use.

### 3. Searching

Searching for documents is pretty much self-explanatory. Simply click on the "search" tab and fill in as much as you want to match in any of the fields. Search is not case sensitive.

To match an exact name (i.e. if you want to find Smith but not Smithson) you can put the name in quotes, "smith".

### 4. Deleting

The **efact** uses a 2-step deletion process. Any user who has access to a document can delete it, however in order to be completely gone the administrator must then purge the document from the "Deleted" queue. This allows the administrator to recover documents which are mistakenly deleted by users.

### 5. Scanning to a Folder

For users that wish to scan directly into multiple folders, **efact** allows you to turn on the "scan to folder" option under System Settings. With this option selected, the user will see a drop-down list as part of the Indexing windows, listing all the subfolders of the main "Documents" or "Filed Closings" folder. Note that if you turn this option on, you should also create some subfolders inside "Documents" to scan into.

## V. Print to Efact

### Integrating **efact** with virtually any application

Print to **efact** is a special Windows printer driver that you can use like a regular printer, except instead of documents being printed out on paper, they will be turned into PDFs and saved in the **efact** appliance.

This will allow you to use

#### 1. Using print to **efact**

Print to **efact** will create a printer called "print to **efact**". Simply choose this printer when printing from any application. **Efactscan** will launch automatically with the document in question, and an indexing window will pop up. After you index this single document, **efactscan** will automatically exit.

## 2. System Requirements

Print to **efact** requires that **efactscan** be installed on the system. Print to **efact** supports Windows XP and Vista.

## 3. Installation

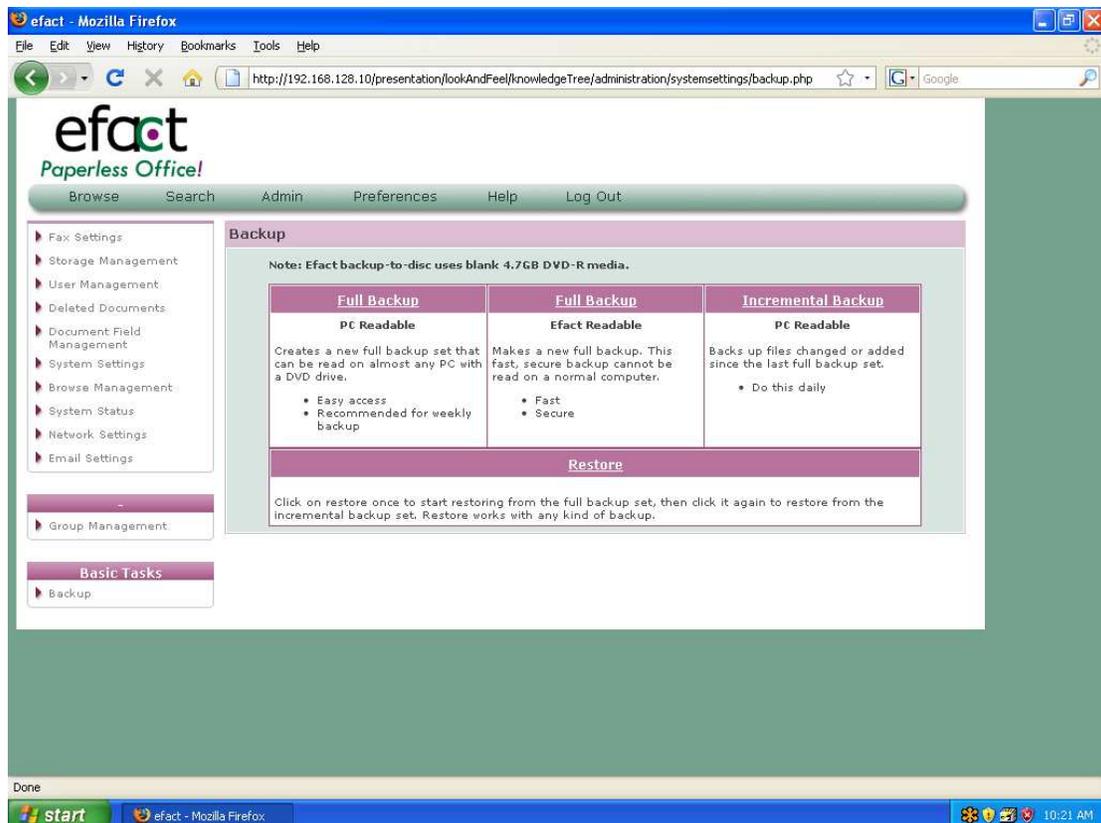
As long as **efactscan** is installed, print to **efact** can be installed with the default options; the only caveat is that it must be installed separately for each user – if you install it as one user on a workstation it will not work for the other users until it has been installed for them also.

# VI. Administration

## Managing the **efact**

First we'd like to note that the **efact**'s admin account is very powerful and the admin menus give a lot of control over how documents are managed. Because of this, it is a good idea to use user accounts for day-to-day usage and only use the admin account for administrative tasks.

## 1. Backups and Restoration.



The screenshot shows the efact administration interface in a Mozilla Firefox browser window. The page title is "efact - Paperless Office!". The navigation menu includes "Browse", "Search", "Admin", "Preferences", "Help", and "Log Out". The left sidebar contains a list of settings categories: Fax Settings, Storage Management, User Management, Deleted Documents, Document Field Management, System Settings, Browse Management, System Status, Network Settings, Email Settings, Group Management, and Basic Tasks. The main content area is titled "Backup" and contains a note: "Note: Efact backup-to-disc uses blank 4.7GB DVD-R media." Below the note is a table with three columns: "Full Backup PC Readable", "Full Backup Efact Readable", and "Incremental Backup PC Readable". Each column contains a description and a list of characteristics. Below the table is a "Restore" button and a note: "Click on restore once to start restoring from the full backup set, then click it again to restore from the incremental backup set. Restore works with any kind of backup." The browser's address bar shows the URL: "http://192.168.128.10/presentation/lookAndFeel/knowledgeTree/administration/systemsettings/backup.php". The Windows taskbar at the bottom shows the Start button, the efact - Mozilla Firefox window, and the system tray with the time 10:21 AM.

Full Backup PC Readable	Full Backup Efact Readable	Incremental Backup PC Readable
Creates a new full backup set that can be read on almost any PC with a DVD drive. <ul style="list-style-type: none"><li>• Easy access</li><li>• Recommended for weekly backup</li></ul>	Makes a new full backup. This fast, secure backup cannot be read on a normal computer. <ul style="list-style-type: none"><li>• Fast</li><li>• Secure</li></ul>	Backs up files changed or added since the last full backup set. <ul style="list-style-type: none"><li>• Do this daily</li></ul>

### **a. Overview, and How Often to Backup**

The **efact** support team is frequently asked “How often should I back up?” One thing to keep in mind when making this decision is that the **efact** also has redundant mirrored hard drives. As a general rule, if you haven’t been scanning very many new files into the **efact**, you don’t need to do a backup. For a company that scans 100 small files in a week, a once-a-week backup may be more than enough. On the other hand, if you have 10 scanners and several workers scanning all day every day, you might want to backup every day (so that at most you would only lose 1 day of work).

### **b. Choosing the right media**

The **efact** supports both DVD+R and DVD-R blank media, which are widely available. Good brands will generally cost somewhere between \$.20 and \$.40 per disc; a spindle of 100 blank discs is usually around \$25. We recommend purchasing these media online – newegg.com in particular has very good prices, while local stores are often overpriced. Also we recommend staying away from store brand or discount brands; Memorex, TDK, Kodak, etc are all good choices.

### **c. PC Readable vs. Efact Readable**

When you view the backup menu, you will see two main options for different types of backups which can be performed. The **efact** readable backup is a special compressed and encrypted backup which can only be used to restore your files onto an **efact** – if it is stolen or lost, no one else will be able to access the data on the disc.

PC Readable backups, on the other hand, can be viewed on any PC (or Mac) with a DVD drive. This will allow a business owner to take home a complete copy of his files, which he or she can access (and even perform a limited search on) through a home PC.

### **d. Incremental Backups**

The incremental backup option will create a disc which will only backup files which have been added or changed since the last full backup – this is a very good option for customers with very large backups who don’t want to have to do 10 discs every time for a full backup.

### **e. Restoration**

**WARNING:** The **efact**’s restoration system will perform a COMPLETE restore of whatever backup disc you give it, which will overwrite the contents of your **efact**. Because of this, we recommend contacting **efact** support before attempting any restore, as generally this is only necessary during disaster recovery scenarios.

### **f. Network backup**

The **efact** has a special "backup" share that allows it to be backup up over the network from other backup systems. The default username and password for this share are www-data and jmnz8923 ; if you backup all the data from this share, this will include all of the files from the **efact** and a copy of the database.

## **2. Browse Management**

The browse management menu will allow you to customize the fields which are displayed when browsing documents or in search results fields. A list of the currently displayed fields (in order) is on the left, while the available fields are on the right.

## **3. Network Settings**

The network settings menu will allow you to change the IP address, netmask, and gateway of the **efact**. Note, after changing these, you must reboot the **efact** for changes to take effect; this can be done from the "System Status" menu.

## **4. Document type and field management**

Document type and field management is a somewhat complex topic; the most important thing to realize is that it is not a good idea to make a lot of changes to an existing configuration unless you know exactly what you are doing. When in doubt, call **efact** technical support.