Kofax eFlow
Layout Designer User's Guide

Version: 6.1.0

Date: 2023-08-29

KOFAX

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Preface

The eFlow Layout Designer enables you to customize the screen layout of the Validate station. The Layout Designer is integrated in the eFlow Design module.

When you create a layout, you determine which fields, tables, and other objects (such as a picture or an image viewer) to display, and the position, order, appearance and behavior of the objects. You can quickly and easily add objects to the layout by dragging and dropping them into the layout design area. Toolbar buttons provide functions for precise positioning of the objects.

Product documentation

To access the full Kofax eFlow documentation set online, see the Kofax eFlow Product Documentation page. For a complete set of Kofax eFlow documents, refer to the Kofax eFlow Release Notes.

Chapter 1

About the Layout Designer

You can create multiple layouts of Validate station to use for different purposes. For example, you may need different layouts in the following situations:

- To use for the thick client Validate station and the browser-based Web Validate station.
- To use in Forms mode and Group mode: In Forms mode, the user processes all fields of a form and then moves to the next form. In this case, the layout includes all fields that must be processed.

  In Group mode, the user processes a group of fields on a form, then moves to the same group of fields on the next form. In this case, you need a layout for each field group that must be processed.
- For using monitors that may be of different sizes and resolutions. So, a layout suitable for one type of monitor, may not be suitable for the other monitor. You can therefore create variants of a layout for different screen resolutions.

Chapter 2

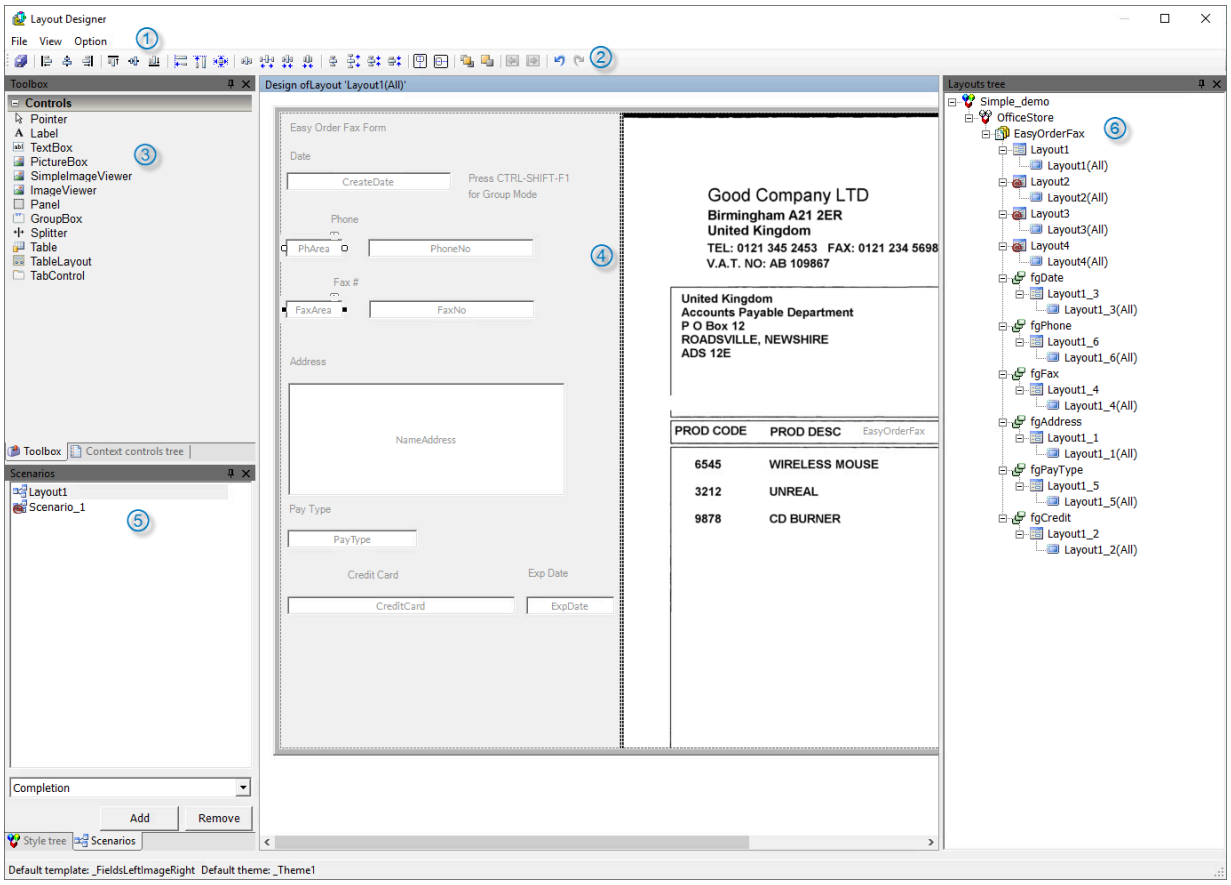
Layout Designer window

The Layout Designer window helps you to create, edit or remove Layouts, Templates, Scenarios, Controls and Themes for the validate stations.

Open the Layout Designer

The following steps describes how to open the Layout Designer from the **eFlow LaunchPro**.

- In **eFlow LaunchPro**, from the **Tools** list, select **Design**.
- In the Design configuration tree, right-click the form for which you want to configure the layout.
- On the context menu, select **Edit Screen Layout**.
  The **Layout Designer** window appears.



Most of these areas are empty until you select a layout in the Layouts tree.

1	Menu bar
2	Toolbar
3	• Toolbox tab • Context controls tree tab • Document outline tab
4	Design of Layout area
5	• Style tree tab • Scenarios tab
6	• Layouts tree tab • Properties tab

Menu bar

The menu bar includes menus as File, View, and Option.

File

The following table details the options available on **File** menu.

Option	Description
Save all	Saves all the changes.
Exit	Exits the Layout Designer window.

View

The following table details the options available on **View** menu.

Option	Description
Designer	The default screen of the Layout Designer
Layouts tree	Opens the Layouts tree tab
Style tree	Opens the Style tree tab
Properties	Opens the Properties tab
Toolbox	Opens the Toolbox tab
Context controls tree	Opens the Context controls tree tab
Document outline	Opens the Document outline tab
Scenarios	Opens the Scenarios tab

Option

Integrity Validation: Checks whether the integrity of the application is valid or not. If the integrity is not valid, causing errors are shown in the Integrity Validation dialog box.

Toolbar

The following table describes the uses of the tools. Most of the tools are available for use with controls. For more information on uses of tools, see Align controls to Move to front or back.

Tool	Description
Save all	Saves all the changes.
Align lefts	Align the controls to the left.

Tool	Description
Align centers	Align the controls to the center.
Align rights	Align the controls to the right.
Align tops	Aligns the controls to the top.
Align middles	Aligns the controls so that they are centered to the middle.
Align bottoms	Aligns the controls to the bottom.
Make same width	Makes the width of the controls same.
Make same width	Makes the width of the controls same .
Make same height	Makes the height of the controls same.
Make same size	Makes the size of the controls same.
Make horizontal spacing equal	Makes the horizontal spacing equal.
Increase horizontal spacing	Increases the horizontal spacing.
Decrease horizontal spacing	Decreases the horizontal spacing.
Remove horizontal spacing	Removes the horizontal spacing.
Make vertical spacing equal	Makes the vertical spacing equal.
Increase vertical spacing	Increases the vertical spacing.
Decrease vertical spacing	Decreases the vertical spacing.
Remove vertical spacing	Removes the vertical spacing.
Center horizontally	Centers the control horizontally.
Center vertically	Centers the control vertically.

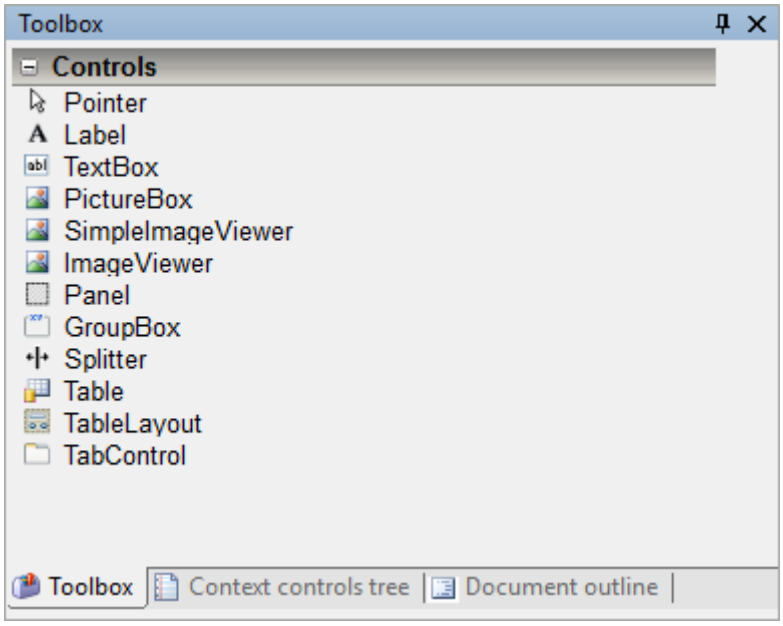
Tool	Description
Bring to front	Brings the control to the front.
Send to back	Sends the control to back.
Go to previous error control	Goes to previous error control.
Go to next error control	Goes to next error control.
Undo	Cancels the changes.
Redo	Does the changes again.

Toolbox tab

The Toolbox tab contains all the controls (design objects) that you can add to your layout.

To add a control to the layout, select the control and drag it to the Design of Layout area.

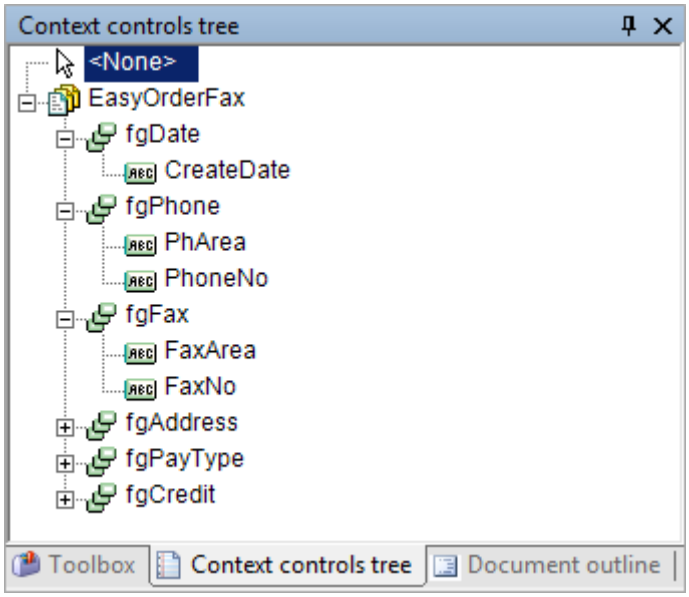
See Add controls to a layout for more information.



Context controls tree tab

The Context controls tree tab contains all objects (forms, groups, fields and tables) that have been defined for the eFlow application in the Design module.

To add an object to the layout, select the object and drag it to the Design of Layout area. This is the quickest and easiest way to add controls. See Add controls to a layout for more information.

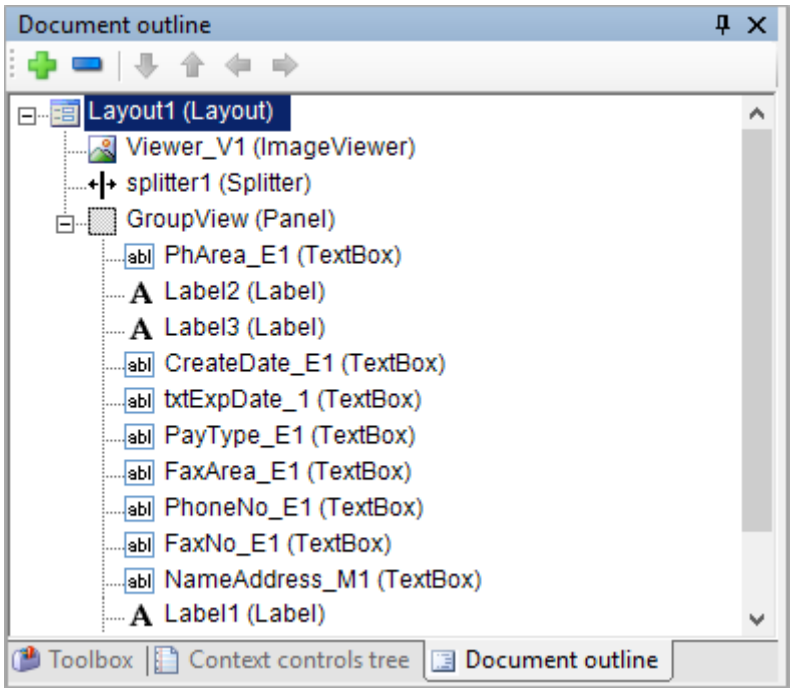


Document outline tab

The Document outline tab contains a hierarchical representation of the layout. It is useful for arranging the order and level of the controls on the layout, particularly of splitter controls, which can be difficult to position manually.

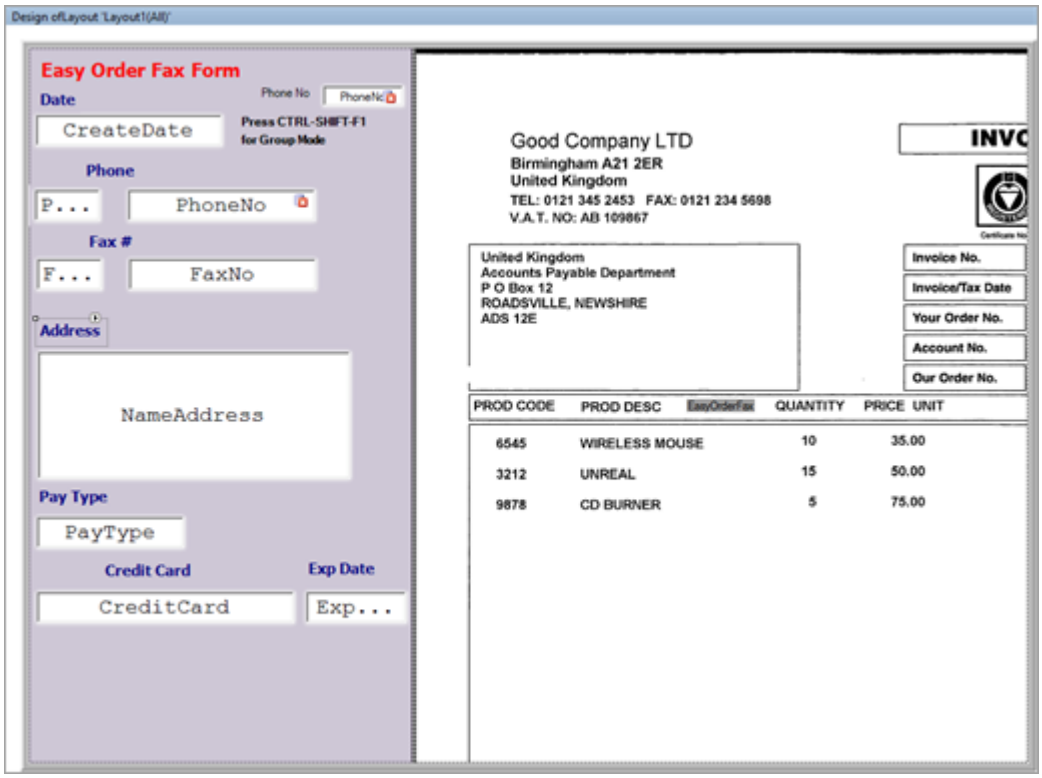
Within the layout, containers (tabs, panels and groups) are displayed at level 1, and controls inside those containers are displayed at level 2.

To change the position of a control, use the arrow buttons above the outline, or drag and drop the controls to the desired position.



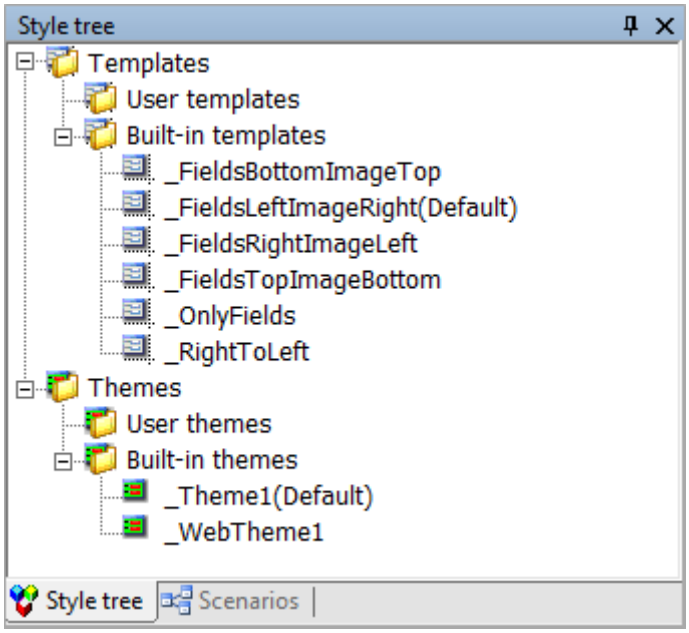
Design of Layout area

The Design of Layout area contains all fields and other objects that will be displayed to operators in the Validate station. You can add objects to the layout by dragging and dropping them from the Context controls tree or the Toolbox to the Design of Layout area.



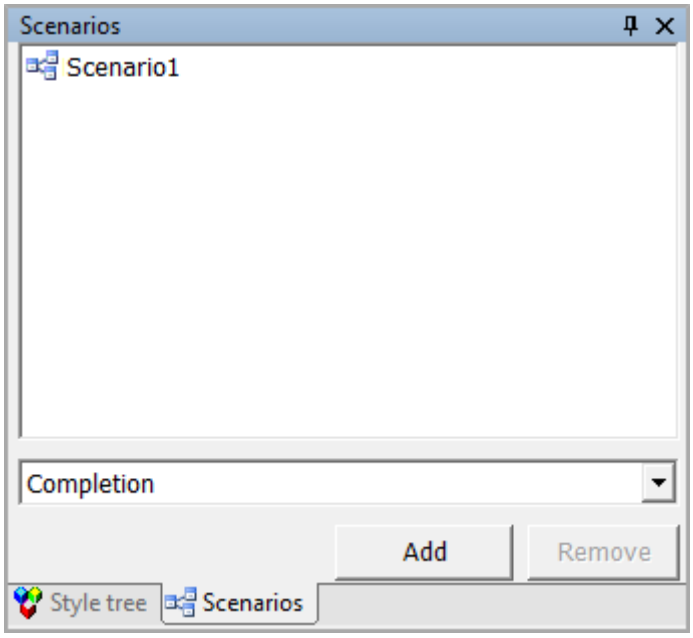
Style tree tab

The Style tree tab contains all available template and themes. See Templates and Themes for more information.



Scenarios tab

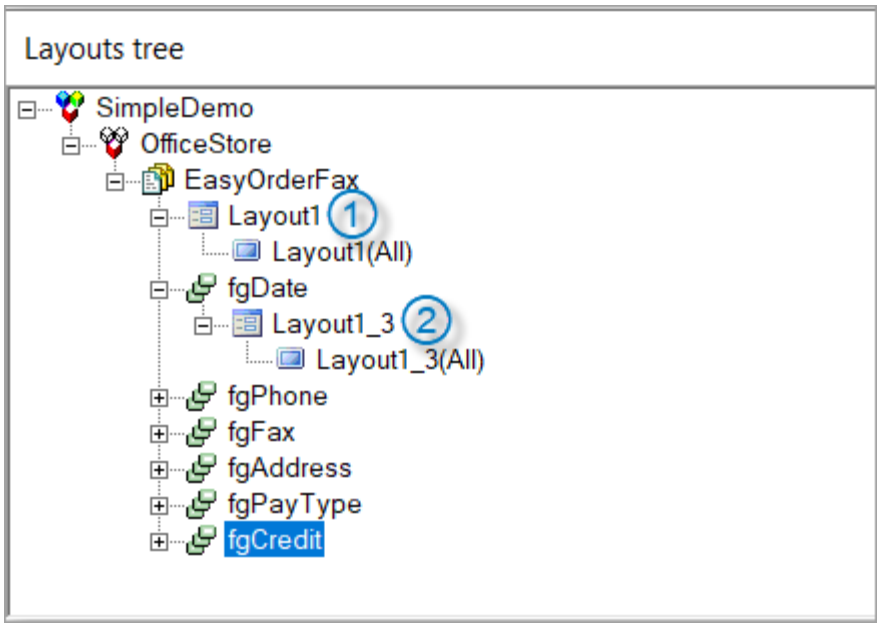
The Scenarios tab contains all scenarios that have been defined for the application.



See Add Scenarios to a layout for more information.

Layouts tree tab

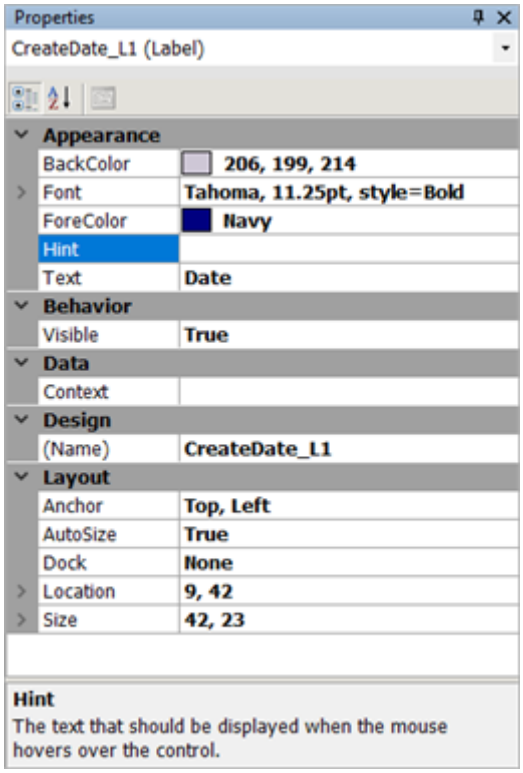
The Layouts tree tab contains all layouts that have been defined for the eFlow application. You can define layouts at form level or group level. See Create layouts for more information.



1	Form layout
2	Group layout

Properties tab

The Properties tab contains the information of the control currently selected in the Design of Layout area or the Document outline. When you click on a property, information about the purpose of the property is displayed below the properties list.



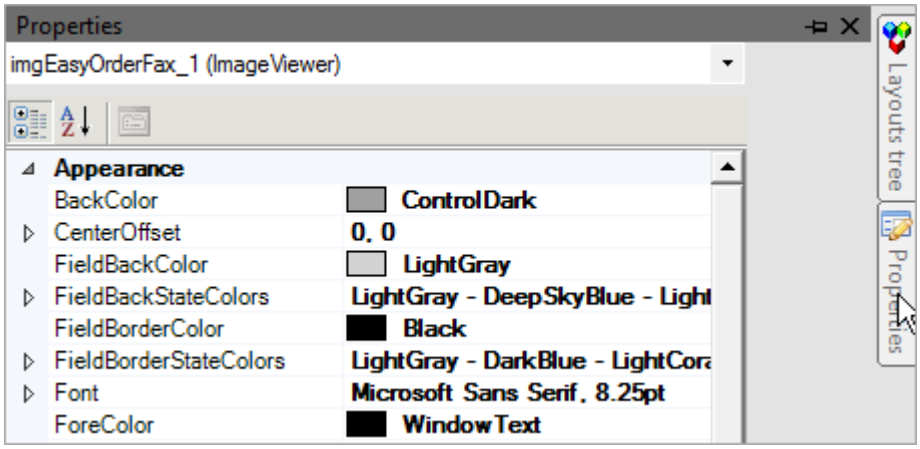
View and hide screen areas

You can select which screen areas to be displayed and which are to be hidden on the screen.

- To hide an area, click **Close** at the top right of the area.
- To view a hidden area again, select the area on the **View** menu.
- To automatically hide an area, click **Auto Hide** at the top right of the area.
  The name of the area appears as a vertical tab.

- To view the automatically hidden area, position the mouse over the tab.

When you move the mouse outside the area the area is hidden again.



- To view the hidden area again, click **Auto Hide** again.

Chapter 3

Create Layout

This chapter explains how to work with layouts. For information on adding objects to a layout, see Add controls to a layout.

Layout types

The Layout Designer includes the following layout types.

Validate and Web Validate layouts

There are separate layout types for the thick client Validate station, which is operated on a traditional LAN-networked computer. For the Web Validate station, which is operated on a Web browser. If you use both types of client, you must create separate layouts for each.

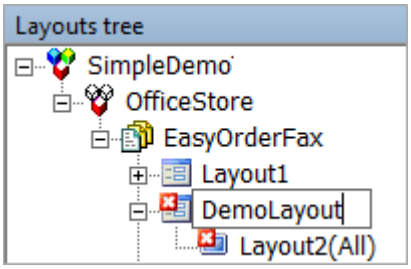
Form layout and group layout

A form layout displays all fields of an entire form on the screen.

A group layout displays the same field or group of fields from successive forms. For example, if the monitor is large enough to display ten groups, the screen displays the group fields of forms 1 to 10. When you move to the next screen, the group fields of forms 11 to 20 are displayed.

Create a layout

1. In the **Layouts tree**, right-click a form or group and select **New Completion Layout** or **New Web completion Layout**.
   A new layout appears in the tree.
2. Right-click the new layout and select **Rename**.
3. Type a name and press Enter.



The **(All)** entry below the layout name represents the layout resolution. This resolution name changes automatically to match to the layout name when you press Enter. **All** indicates that the layout applies for all monitor resolutions for which no specific resolution layout is available. See Create a resolution for information on creating resolution-specific layouts.

4. If necessary, in the **Design of Layout** area, change the size of the layout by dragging its borders with the mouse. See Change control size for more information.

   For example, in a group layout, the layout area should be just large enough to accommodate its objects. This ensures that a larger number of groups are displayed on the screen in Tiled Group mode. See Add controls to a layout for more information.

Create a resolution

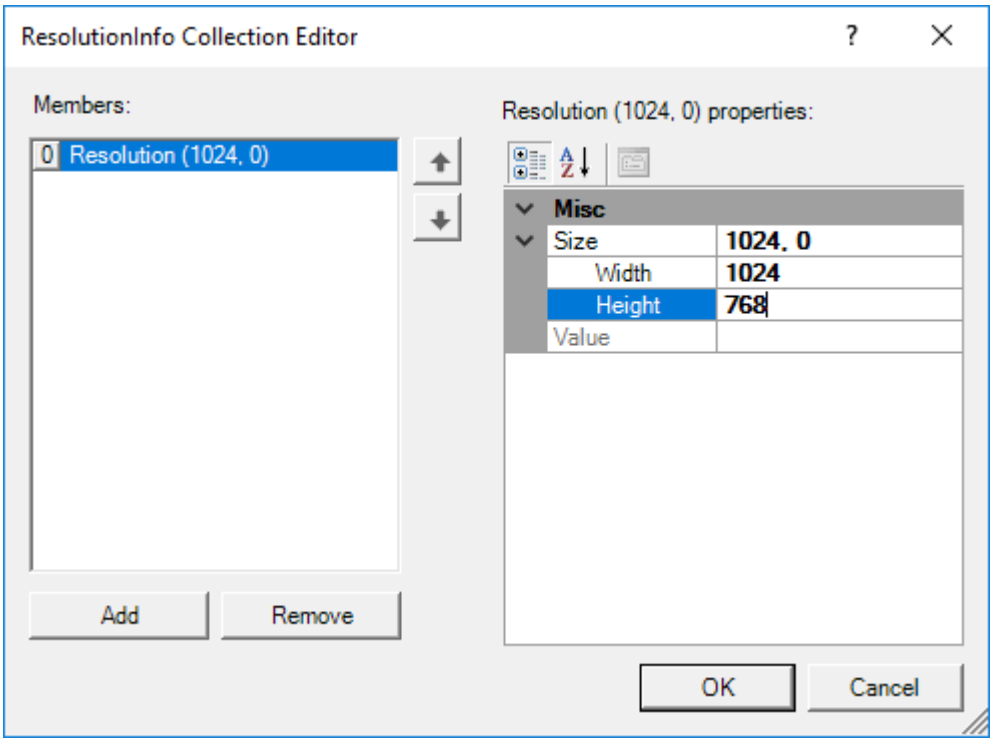
The monitors used at Validate stations may be of different sizes and resolutions, so the same layout may not be suitable for different types of monitors. You can therefore create variants of a layout for different screen resolutions. For example, in a resolution layout for a small screen you may want to decrease the spacing between the objects to ensure that they all fit on the screen.

Creating a resolution duplicates the parent layout, so it is best to finish designing your layout before you add a new resolution, and then make adjustments to the resolution.

1. Right-click the layout and select **New resolution**.

   A new resolution layout appears in the **Layouts tree**.
2. Right-click the new resolution and select **Edit resolutions**.

   The **ResolutionInfo Collection Editor** dialog box appears.



3. Click **Add**.
4. Click ⌄ to the left of the **Size** property.
5. Type values in the **Width** and **Height** boxes, in pixels.
   Typical resolution for a 15" monitor is 1024 x 768 pixels.
6. Click **OK**.

Apply a template

You can use the templates provided by eFlow or create a new template. See Add a template to layout to a layout.

Apply a theme

Themes enable you to change the appearance of a layout. See Apply themes to a layout for more information.

Import and export layouts

You can export layouts and import them into the same application or other applications. You can export or import an entire layout, including all its resolutions, or an individual resolution layout. Layout files have the file extension .lay.

You can import layouts into other applications, forms or groups. If you import a layout into a form or group in which the context definitions of the original layout do not exist, the layout controls are still imported, but the controls are marked with an error . You must either delete these controls in the imported layout, or set a new context.

If you import a layout with the same name as an existing layout, the imported layout is automatically assigned with a new name based on the original layout's name. However, if you import a resolution with the same name as an existing resolution, the name is not automatically changed and you must change it manually.

To export a layout or resolution perform the following steps:

1. In the **Layouts tree**, right-click the layout or the resolution and select **Export**.
2. Type a name for the layout file and click **Save**.

To import a layout or resolution perform the following steps:

1. Right-click the form or group to which the layout should be imported and select **Import**.
2. Navigate and select the **.lay** file and click **Open**.
3. In the **Import** dialog box, select the resolutions to import and click **OK**.

Rename a layout

1. Right-click the layout and select **Rename**.
2. Type a new name and press Enter.

Remove a layout

1. Right-click the layout and select **Remove**.
2. Click **Yes**.

Chapter 4

Add controls to a layout

After you have created a layout, now you add objects to the layout by dragging and dropping them from the Context controls tree or the Toolbox into the Design of Layout area.

Some controls, such as tabs, panels, group boxes and splitters, serve as separators or containers for the arrangement of the objects on different areas of the screen. You should add these controls first.

Some controls, such as text boxes or image viewers, require that you define a data source, known as the "context" for the control. The context defines which data will be displayed. For example, the context for a text box is the field name; the context for an image viewer may be the entire form, or just an individual field group or field.

Add a control

In the **Toolbox** or **Context controls tree**, do one of the following actions.

- Click on the control, and then click on the **Design of Layout** area.

or

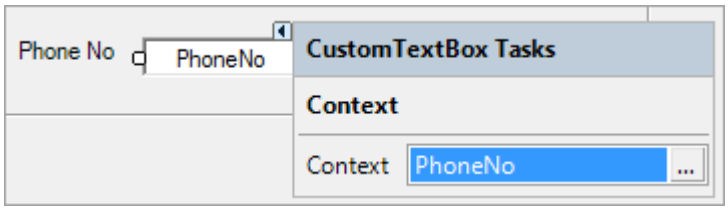
- Select the control, and then drag and drop the control into the **Design of Layout** area.

Define the control context

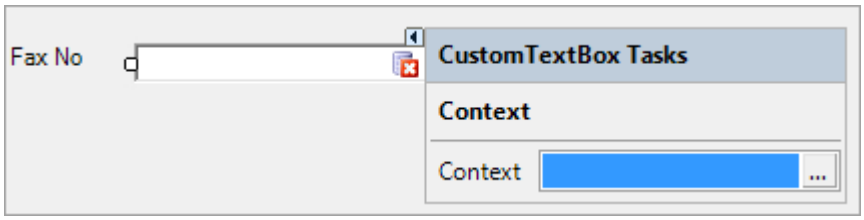
When you add a control that requires a context, a small arrow appears at the top right of the control.

Click the arrow to view or select the context.

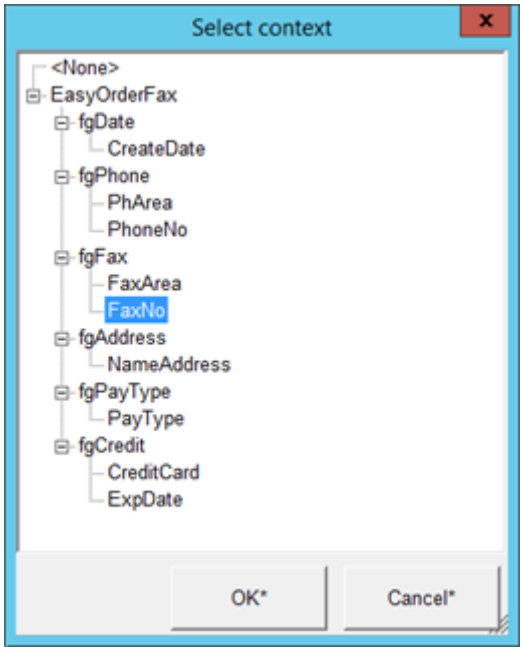
If the context is already assigned (for example, if you added a field from the Context controls tree), the assigned context is displayed in the **Context** field.



If the context is not assigned (for example, if you added a text box control from the Toolbox), in addition to the arrow, an error tag is displayed.



To correct the error, click ... and select the context. For example, for a text box, select the field or for an image viewer select the entire form, or just a field.



If you have several objects with context errors on your form, you can navigate from one error tag to the next using the **Next error** and **Previous error** on toolbar.

Add controls from the Context controls tree

The quickest and easiest way to add controls to a layout is to drag the relevant objects from the Context controls tree to the Design of Layout area.

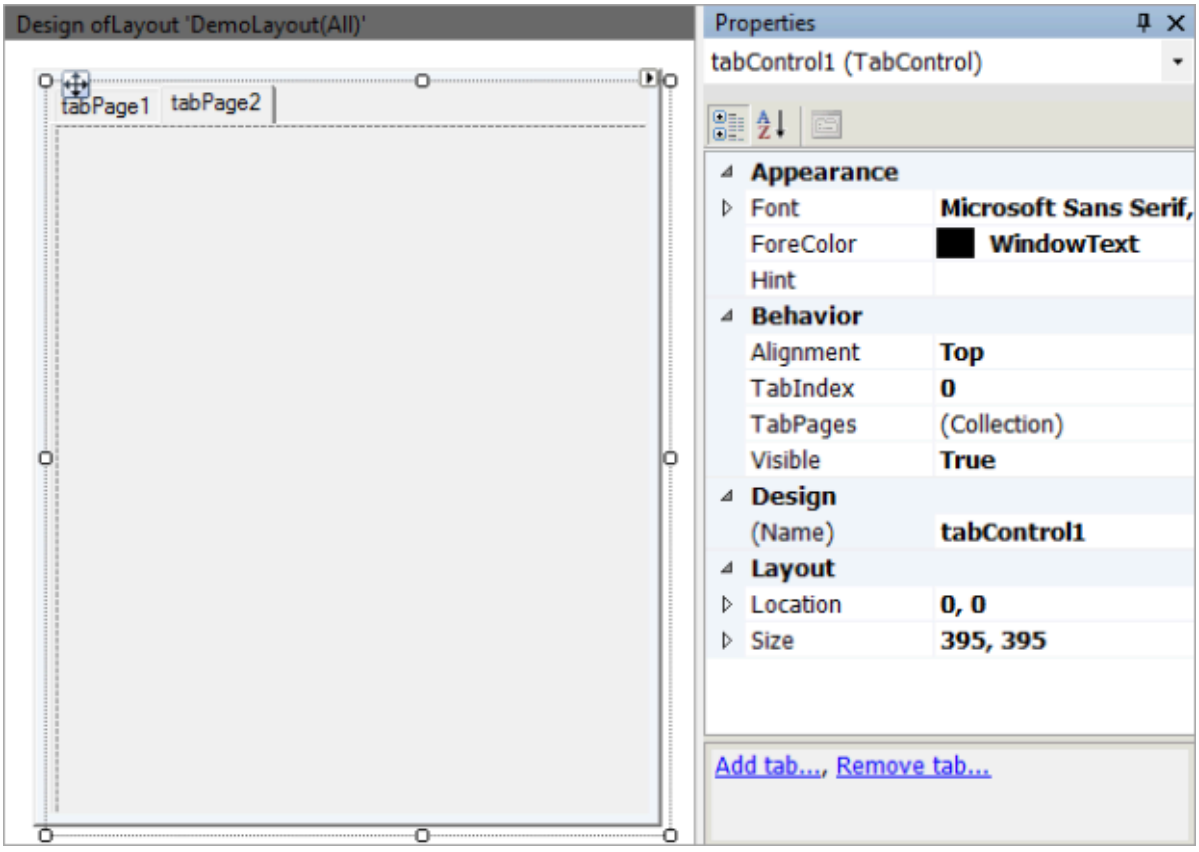
For example, if you select the form and drag it to the Design of Layout area, all objects (forms, groups, fields and tables) that have been defined for the eFlow application in the Design module are added to the layout.

Tab Control

Tab controls allow you to place objects in different tabs. They are useful if you need to present a lot of data on the screen.

1. To add the first tab, on the **Toolbox** tab, select **TabControl**, then drag and drop it into the **Design of Layout** area.
2. In the **Properties** pane, type a name in the **Appearance** > **Text** field.
3. Set other properties as needed.
4. To add more tabs, perform the following steps.
   a. Click on the label of the first tab.
   b. In the **Properties** window, click **Add tab**.

> To remove a tab, select the tab and click **Remove tab**.



Panel

Panels allow you to divide the screen into separate areas. For example, you can display the fields in one panel and the image viewer in another panel.

1. On the **Toolbox** tab, select **Panel**, then drag and drop it into the **Design of Layout** area.
2. In the **Properties** pane, type a name in the **Name** field under **Design**.
3. Set other properties as needed.

Group Box

Use group boxes to group related fields into separate areas.

To add a group box, drag a group from the Context controls tree into the Layout of Design area. The context of the fields is automatically added to the text boxes.

Alternatively, you can just add a group box and then add fields to the group:

1. On the **Toolbox** tab, select **GroupBox** and drag and drop it into the **Design of Layout** area.
2. In the **Properties** pane, type a name in the **Appearance** > **Text** field.
3. Set other properties as needed.

Splitter

The Splitter control allows you to increase or decrease the size of a screen area. Splitters are placed between two panels. When you position the mouse cursor over the splitter, the cursor changes to a double-arrow, which you can drag to increase or decrease the size of the selected area.

1. Add the panels or groups.
2. On the **Toolbox** tab, select **Splitter** and drag and drop it into the **Design of Layout** area.
3. To position the splitter between the panels or groups, on the **Document outline** tab, either drag and drop or use at the top of the document outline.

Pointer

The Pointer control helps you reset the mouse cursor to the standard Windows pointer appearance.

Label

Labels allow you to add static text, such as a field description. You cannot select or edit a label in the Validate station.

1. On the **Toolbox** tab, select **Label** and drag and drop it into the **Design of Layout** area.
2. In the **Properties** pane, type a name in the **Appearance** > **Text** field.
3. Set other properties as required.

TextBox

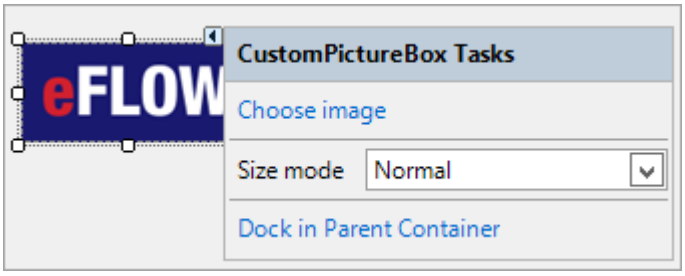
Text boxes allow you to add fields in which Validate users can enter values.

1. On the **Toolbox** tab, select **TextBox** and drag and drop it into the **Design of Layout** area.
2. Click the arrow at the top right of the box and select the context. See Define the control context for more information.
3. In the **Properties** pane, enter a name in the **Appearance** > **Text** field.
4. Set other properties as needed.

PictureBox

Picture boxes allow you to add images, such as a logo, to the layout.

1. On the **Toolbox** tab, select **PictureBox** and drag and drop it into the **Design of Layout** area.
2. In the **Properties** pane, type a name in the field under **Appearance**.
3. To select an image, at the top right of the box, click , and click **Choose image** and select the required image.



4. To set the size of the picture, select one of the following size modes.

Size	Description
Normal	The image remains at its original size.

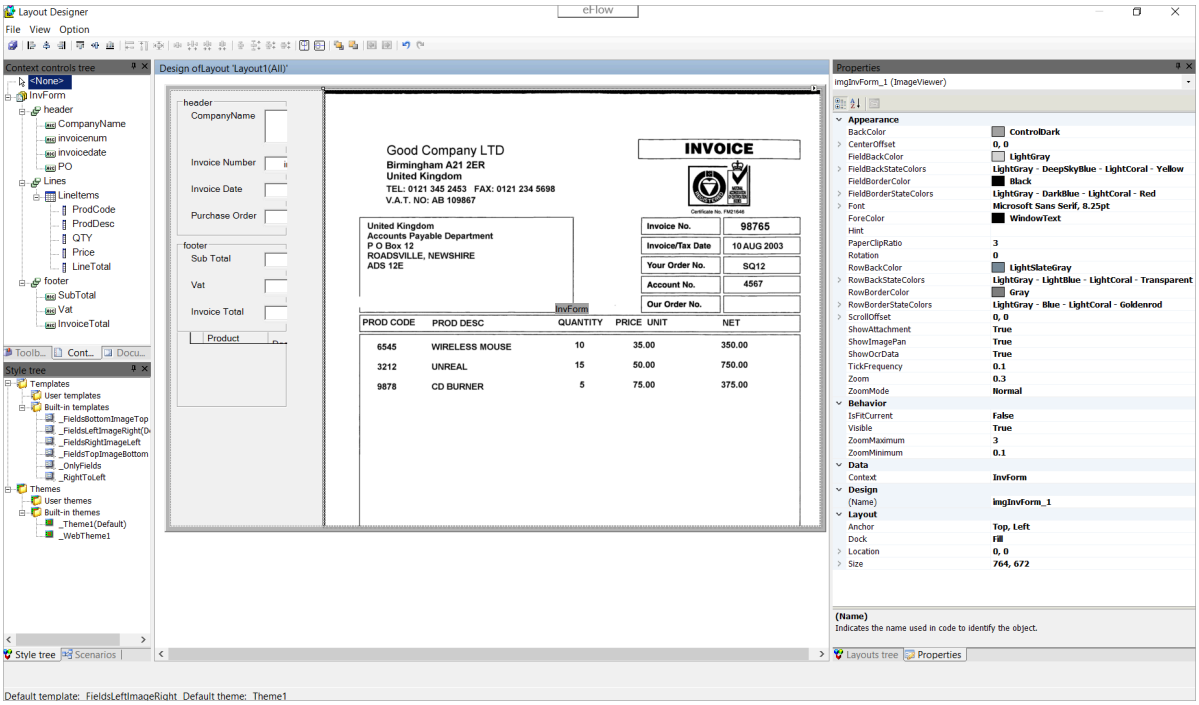
Size	Description
Stretch image	Adjusts the image size to fit the picture box.
AutoSize	Adjusts the picture box size to fit the image.
CenterImage	Centers the image horizontally and vertically in the picture box.
Zoom	Maximizes and minimizes the image.

5. To set the PictureBox to left, right, top bottom or fill in the complete layout frame, use the **Dock** list.
6. Set other properties as needed.

Simple Image Viewer

Image Viewer allows you to view Collection and TIF in the layout area.

1. On the **Toolbox** tab, click **Image Viewer** control and drag and drop it into the **Design of Layout** area.



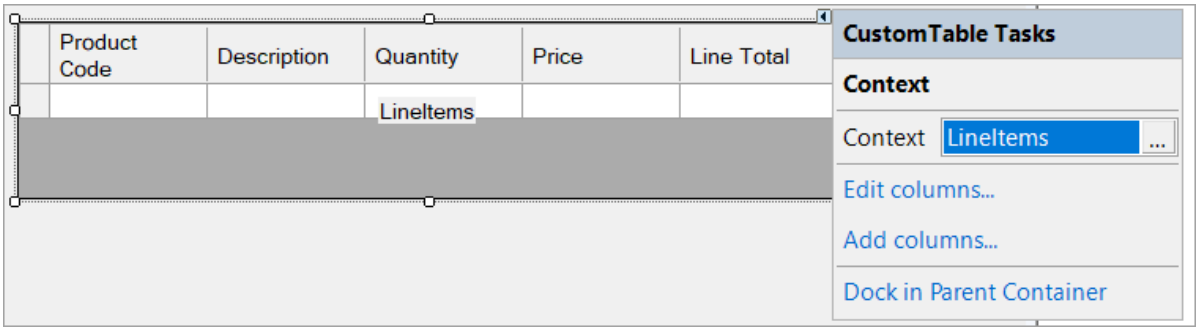
2. Resize the image area as required.
3. Click at the top-right of the box and select the context. See Define the control context for more information.
4. Set other properties as needed.

> Image viewer has few more options than the Simple Image Viewer.

Table

Table allows you to add table in the layout.

1. On the **Toolbox** tab, click **Table** control and drag and drop it into the **Design of Layout** area.
2. Resize the table area as required.
3. Click the arrow at the top right of the box and select the context. See Define the control context for more information.



Context can be defined only for the line items.

4. To add or remove columns, click **Edit columns**, and then add or remove a column.

Chapter 5

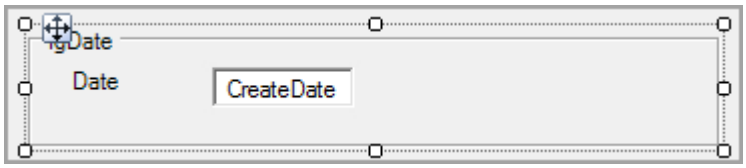
Manipulate controls

This chapter explains how to select, position and modify layout controls. For information on adding controls to a layout, see Add controls to a layout.

Select controls

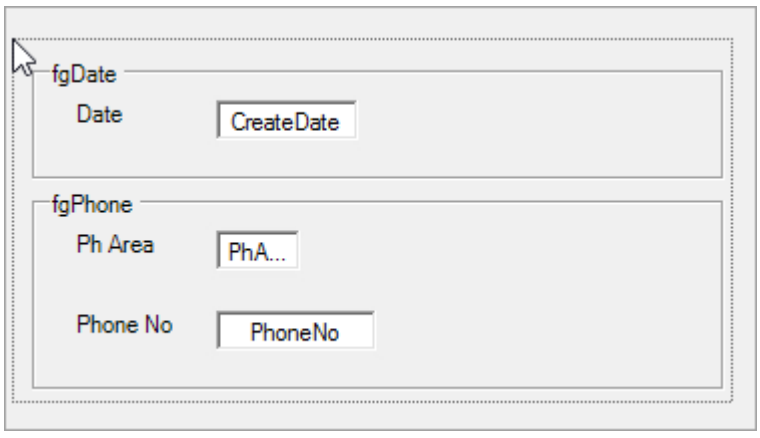
To select a single control, click on the **Design of Layout** area or the **Document Outline**.

Selected controls are surrounded by a dotted border with sizing handles.



To select multiple controls, use one of the following methods:

- Select the first control, then holding down the Shift or Ctrl key, click on the other controls.
- Hold down the left mouse button and drag the mouse horizontally and vertically until the controls are surrounded by a dotted line, then release the mouse button.



- To select all controls of a specific type, such as all text boxes or all groups, right-click on one of the controls and click **Select all of type**.

Change control properties

1. Select the control. The **Properties** pane appears. Alternatively, in the **View** menu, select **Properties**.
2. Edit the other properties as needed.

Move a control

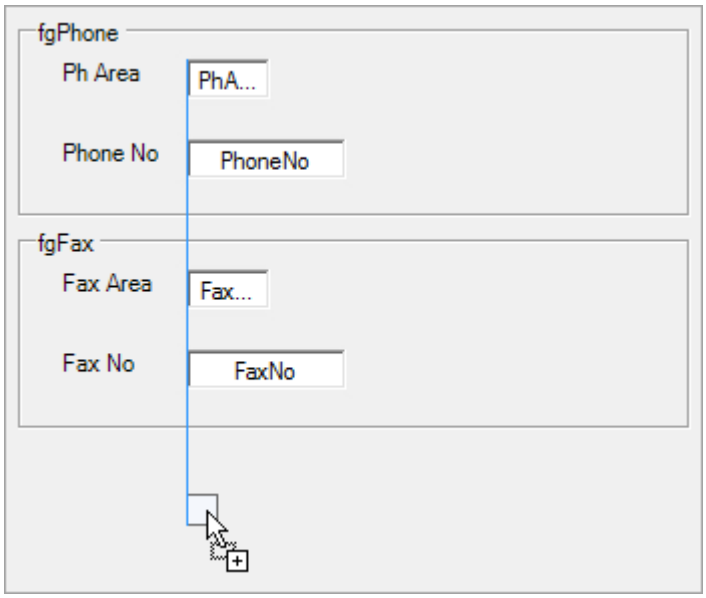
You can move a single control or select multiple controls and move them at the same time.

1. Select the control or select multiple controls.
2. Position the mouse cursor over the move handle , hold down the mouse button and drag the control to the desired position, then release the mouse button.

You can also change the control's position by changing the X and Y values of the **Location** property.

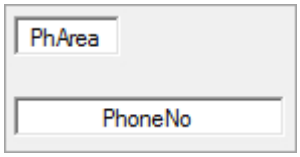
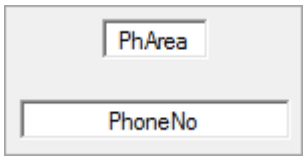
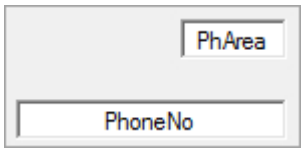
Align controls

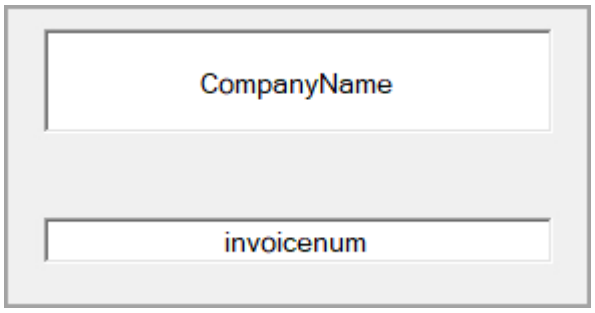
When you drag a control into the layout, or move a control, alignment grid appears to help you align the control with other controls.



Use the following toolbar buttons to align controls with each other. Select the controls, then click the toolbar button.

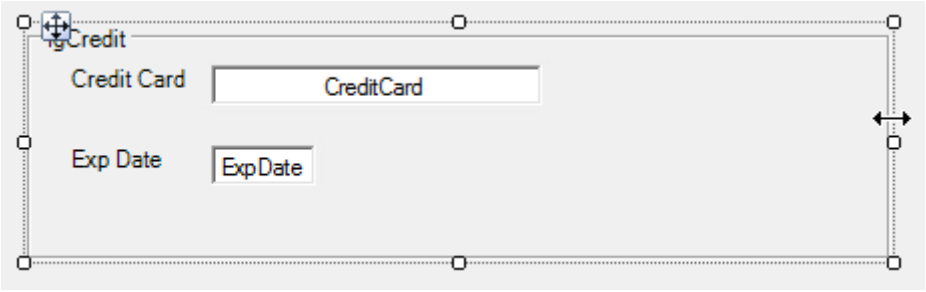
You have to select more than one control to see the effective alignment.

Button	Description	Example
Align lefts	Align the controls to the left.	
Align centers	Align the controls to the center.	
Align rights	Align the controls to the right.	

Button	Description	Example
Align tops	Aligns the controls to the top.	
Align middles	Aligns the controls so that they are centered to the middle.	
Align bottoms	Aligns the controls to the bottom.	
Make same width	Makes the width of the controls same.	

Change control size

To change the size of a control, click on the control, then position the mouse cursor over the dotted line surrounding the control until a double headed arrow cursor ↔ appears. Drag the cursor to increase or decrease the control size.



You can also change the control's size by changing the **Width** and **Height** values of the control's Size property.

Use the following toolbar buttons to change the size of controls in relation to one another. Select the controls, and then click the toolbar button.

Button	Description
Make same width	Makes the width of the controls same.
Make same height	Makes the height of the controls same.
Make same size	Makes the size of the controls same.

Change control spacing

Use the following buttons to change the spacing between controls. Select the controls, and then click the toolbar button.

Button	Description
Make horizontal spacing equal	Makes the horizontal spacing equal.
Increase horizontal spacing	Increases the horizontal spacing.
Decrease horizontal spacing	Decreases the horizontal spacing.
Remove horizontal spacing	Removes the horizontal spacing.
Make vertical spacing equal	Makes the vertical spacing equal.
Increase vertical spacing	Increases the vertical spacing.
Decrease vertical spacing	Decreases the vertical spacing.
Remove vertical spacing	Removes the vertical spacing.

Center a control

Use the following buttons to center a control within its container. For example, a control that is in a group box is placed in the center of that group box.

Button	Description
Center horizontally	Centers the control horizontally.
Center vertically	Centers the control vertically.

Move to front or back

Use the following buttons to position controls in front of or behind one another. Select the control, and then click the toolbar button.

Button	Description
Bring to front	Brings the control to the front.
Send to back	Sends the control to back.

Chapter 6

Add Scenarios to a layout

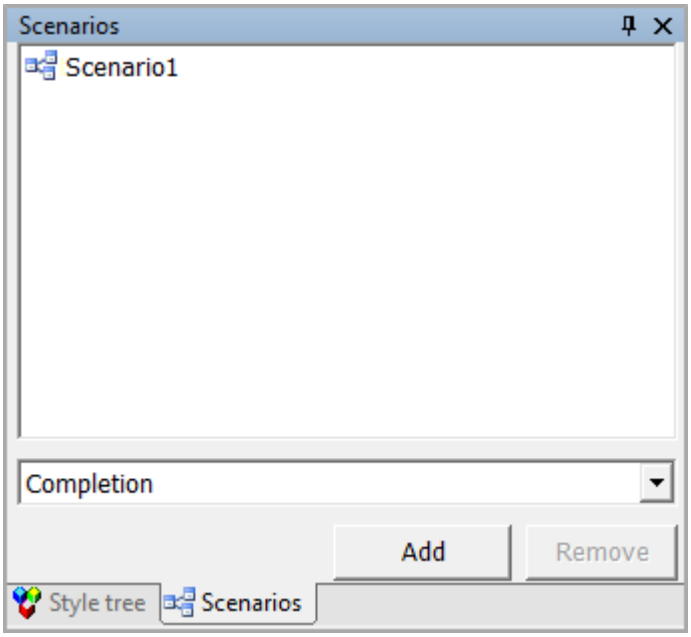
A scenario is a structure that communicates the layouts created in the Layout Designer to the Validate Station. A scenario describes a sequence of layouts to be run at the Validate station. The scenario defines (depending on the work mode) whether the whole layout form will be displayed at the Validate station, or just individual groups or fields from the form, and in which order.

You must create separate scenarios for Validate and Web Validate.

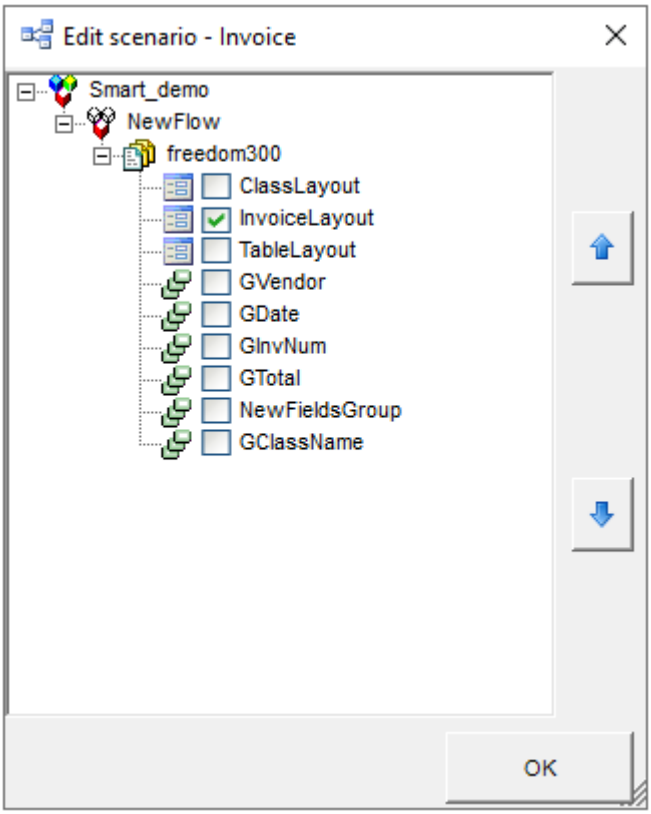
Add a scenario

1. On the **Scenarios** tab, in the drop-down list, select any of the following scenarios.
   - **Completion**
   - **Web Completion**

   Web Completion scenarios are indicated by a red @ sign over the icon.



2. Click **Add**.
3. Double-click the scenario to edit it.
   The **Edit scenario** dialog box appears.



4. In the **Edit scenario** dialog box, select the check box for each layout you want to include in the scenario.

   The first selected layout is displayed by default in the Validate station. To allow users to select other layouts, in the Application Designer, set the station parameter "AllowManualLayoutChange" to True. Refer to the *Kofax eFlow Design User Guide* for information on station parameters.
5. Use the arrow buttons on the right to change the order in which the layouts are displayed in the Validate layout selection list.
6. Click **OK**.

Rename a scenario

1. Right-click the scenario and select **Rename**.
2. Type the new name and press Enter.

Remove a scenario

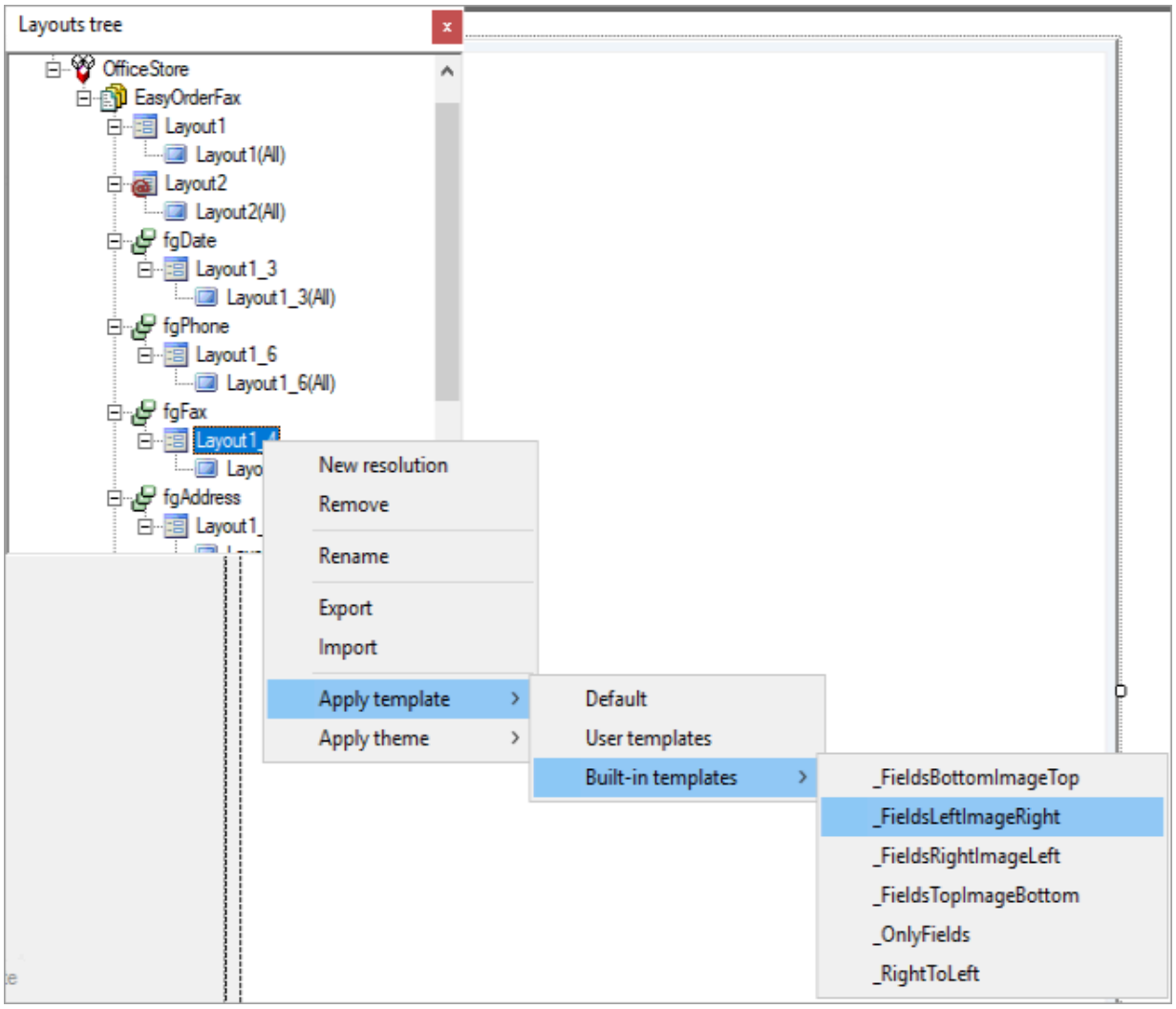
1. Right-click the scenario and select **Remove**.
2. Click **Yes**.

Chapter 7

Apply a template to a layout

You can define the position, order, appearance, and behavior of controls on a new or existing layout by applying a template. You can either use the built-in templates provided by eFlow or create a new template and apply to the layout.

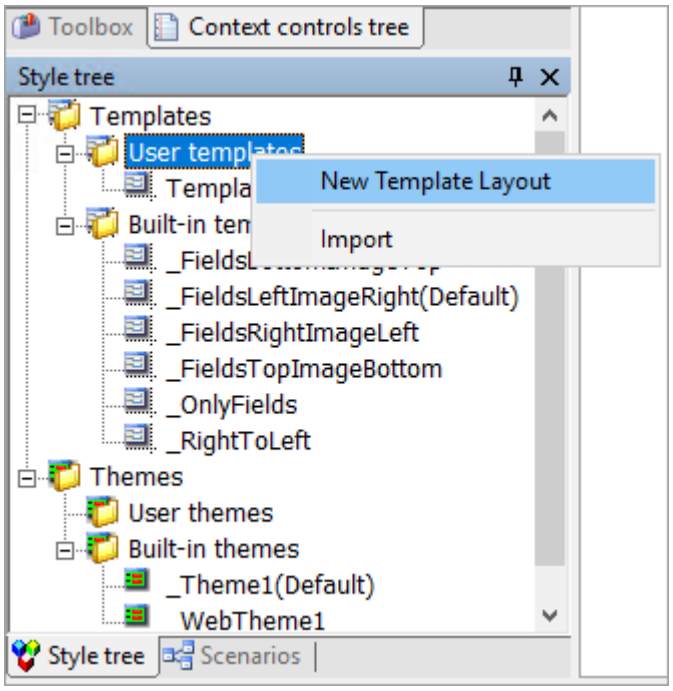
- To view a template, in the **Style tree**, double-click the template.
- To set the default template, in the **Style tree**, right-click the template and select **Set default**.
- To apply a template, right-click any layout from the **Layouts tree** and select the required template.



You can use any user template or use any built-in template.

A user template is only available if it is created.

- To create a user template, in the **Style tree**, right-click **User templates** and select **New Template Layout**.



A new template layout appears, edit the template as required.

Import and export templates

You can export templates and import them into other forms, groups or applications. Template files have a .template extension. You can only import templates into the User templates folder.

1. To export a template perform the following steps:
   a. In the **Style tree**, right-click the template and select **Export**.
   b. Enter a name for the template and click **Save**.
2. To import a template perform the following steps:
   a. In the **Style tree**, right-click the **User templates** folder and select **Import**.
   b. Select the saved template file and click **Open**.
   c. Enter a name for the template and click **OK**.

Rename a template

You can only rename user templates, not the built-in templates.

1. In the **Style tree**, right-click the template and select **Rename**.
2. Type a new name and press Enter.

Remove a template

You can only remove user templates, not the built-in templates.

1. In the **Style tree**, right-click the template and select **Remove**.
2. When prompted, click **Yes**.

Chapter 8

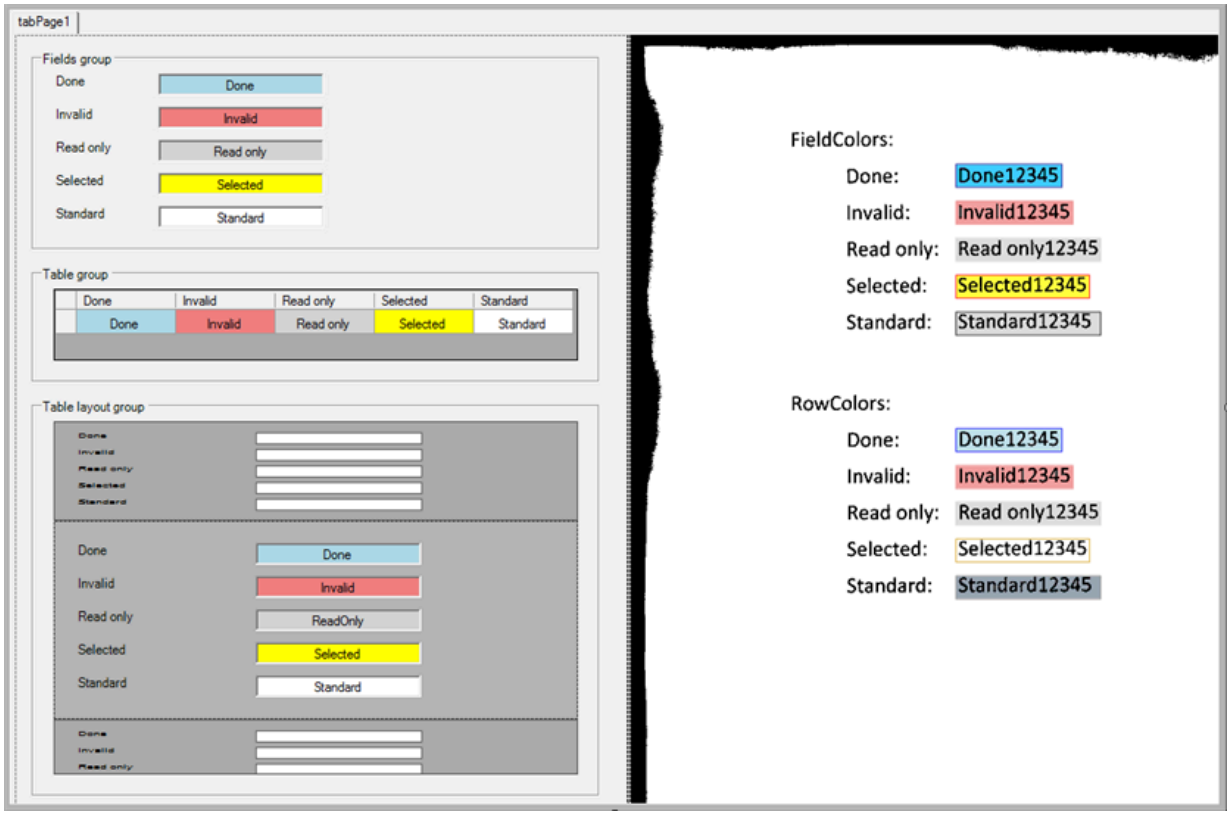
Apply themes to a layout

Themes enable you to change the appearance of a layout. For example, you can change the background color and fonts.

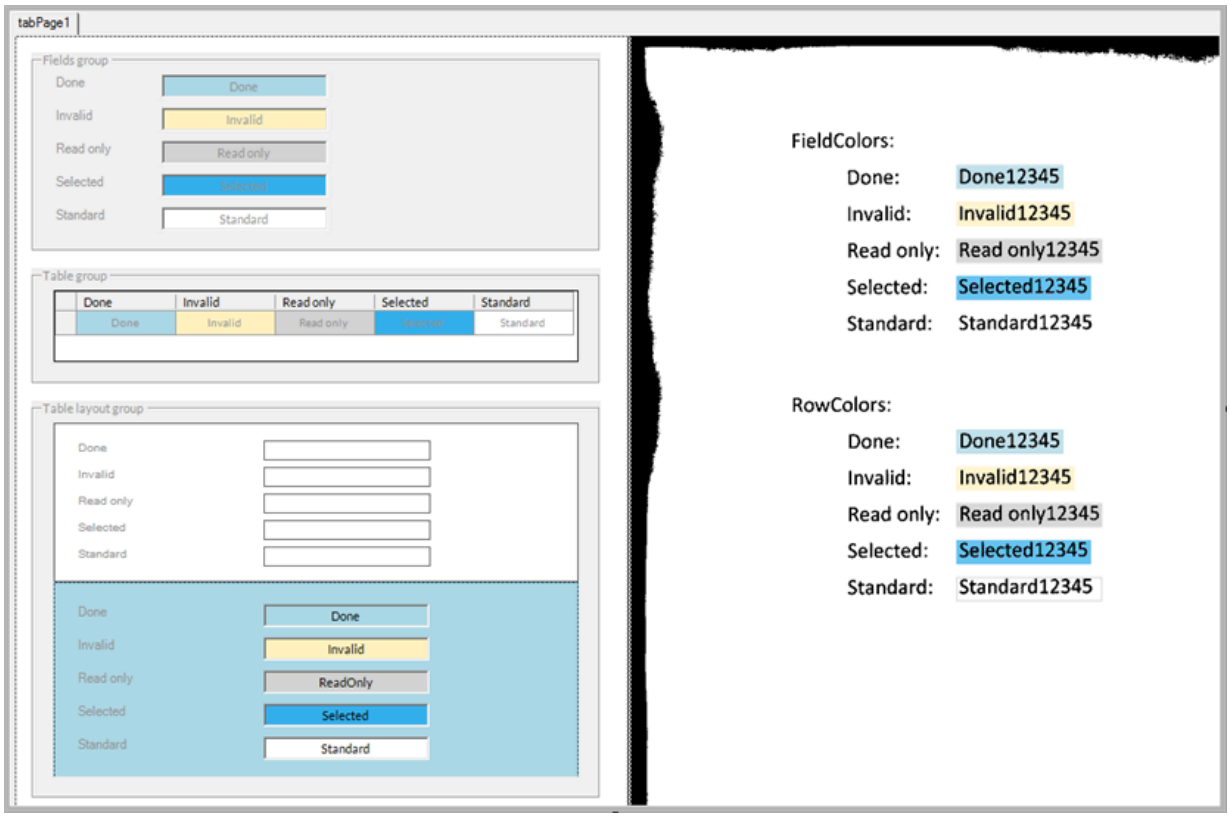
Built-in themes

The following default themes are available for the layout.

- _Theme1: A theme design for the Validate station.



- _WebTheme1: A theme design for the Web Validate station.



View a theme

In the **Style tree**, double-click the theme.

Apply a theme

1. In the **Layouts tree**, right-click the layout and select **Apply theme**.
2. Select the default theme, a user theme or a built-in theme.

Set the default theme

The default theme is automatically applied when you create a new layout.

In the **Style tree**, right-click the theme and select **Set default**.

Create a new theme

1. In the **Style tree**, right-click **User themes** and select **New Theme Layout**.
2. Click on a control to select it.
3. In the **Properties**, set the properties as needed.

Import and export themes

You can export themes and import them into other forms, groups or applications. Theme files have a .theme extension. You can only import templates into the User templates folder.

1. To export a theme perform the following steps:
   a. In the **Style tree**, right-click the theme and select **Export**.
   b. Type a name for the theme and click **Save**.
2. To import a theme perform the following steps:
   a. In the **Style tree**, right-click the **User themes** folder and select Import.
   b. Select the saved theme file and click **Open**.
   c. Type a name for the theme and click **OK**.

Rename a theme

You can only rename user themes, not the built-in themes.

1. In the **Style tree**, right-click the theme and select **Rename**.
2. Type the new name and press Enter.

Remove a theme

You can only remove user themes, not the built-in theme.

1. In the **Style tree**, right-click the theme and select **Remove**.
2. When prompted, click **Yes**.