



Kofax eFlow Organize User's Guide

Version: 6.1.0

Date: 2023-08-29

KOFAX

© 2005 – 2023 Kofax. All rights reserved.

Kofax is a trademark of Kofax, Inc., registered in the U.S. and/or other countries. All other trademarks are the property of their respective owners. No part of this publication may be reproduced, stored, or transmitted in any form without the prior written permission of Kofax.

Table of Contents

Preface.....	4
Product documentation.....	4
Organize window.....	5
Collections view.....	6
Collection thumbnails view.....	6
Toolbar.....	6
Form type view.....	8
Classification view.....	9
Page view.....	9
Select objects.....	11
Arrange pages and forms.....	12
Move a page.....	12
Move a form.....	12
Work with collections.....	13
Work with forms.....	14
Work with pages.....	15

Preface

In the eFlow Organize module, you can reorganize eFlow collections, forms and pages and, to a limited extent, do certain types of editing.

eFlow Organize can be integrated into any eFlow station that requires the ability to reorganize collections. For example, Organize is accessible from the Scan and Collect stations.

Programmatically, the Organize GUI is implemented as a .NET user control, and as such it is easily included into any eFlow station by dragging the control onto an application window. The Organize module can be customized by programming the Organize API.

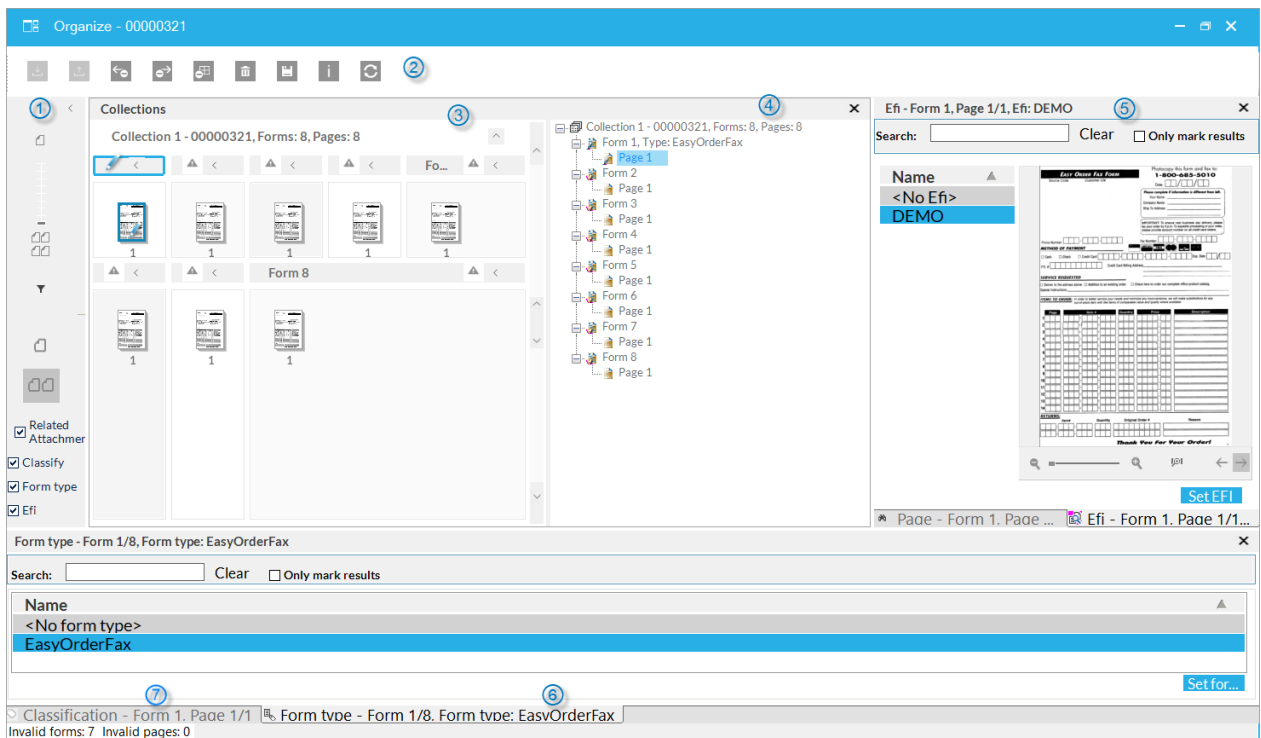
Product documentation

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.


Organize window

In **eFlow LaunchPro**, select the application you want to work with, then select **Organize** from the **Stations** list.

The Organize window appears.



1	Page thumbnail size
2	Tool bar
3	Collection thumbnails view
4	Collections view
5	EFI view
6	Form type view
7	Classification view

 Views are configurable, some of them may not be available in your installation.

Collections view



Displays collections in a tree view where collections include forms and the forms include pages.


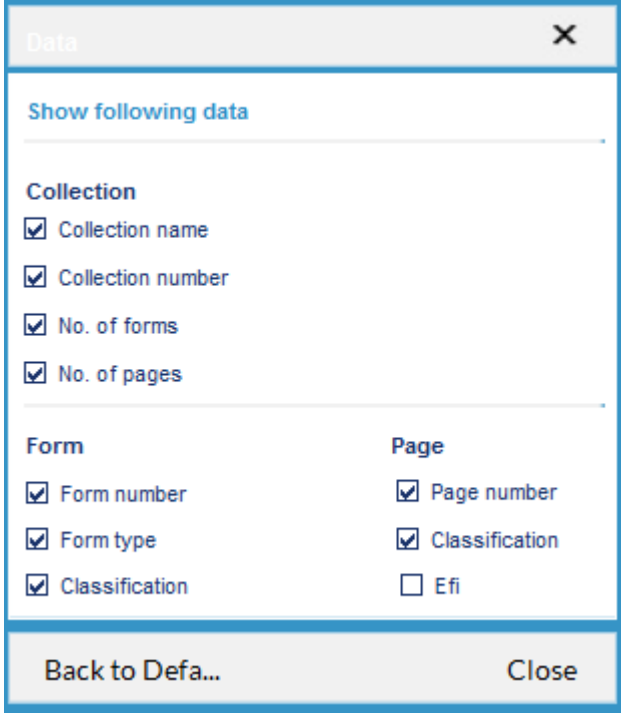





Collection thumbnails view

Displays the pages of each form as thumbnails.

Toolbar

Contains settings that control the user interface appearance.

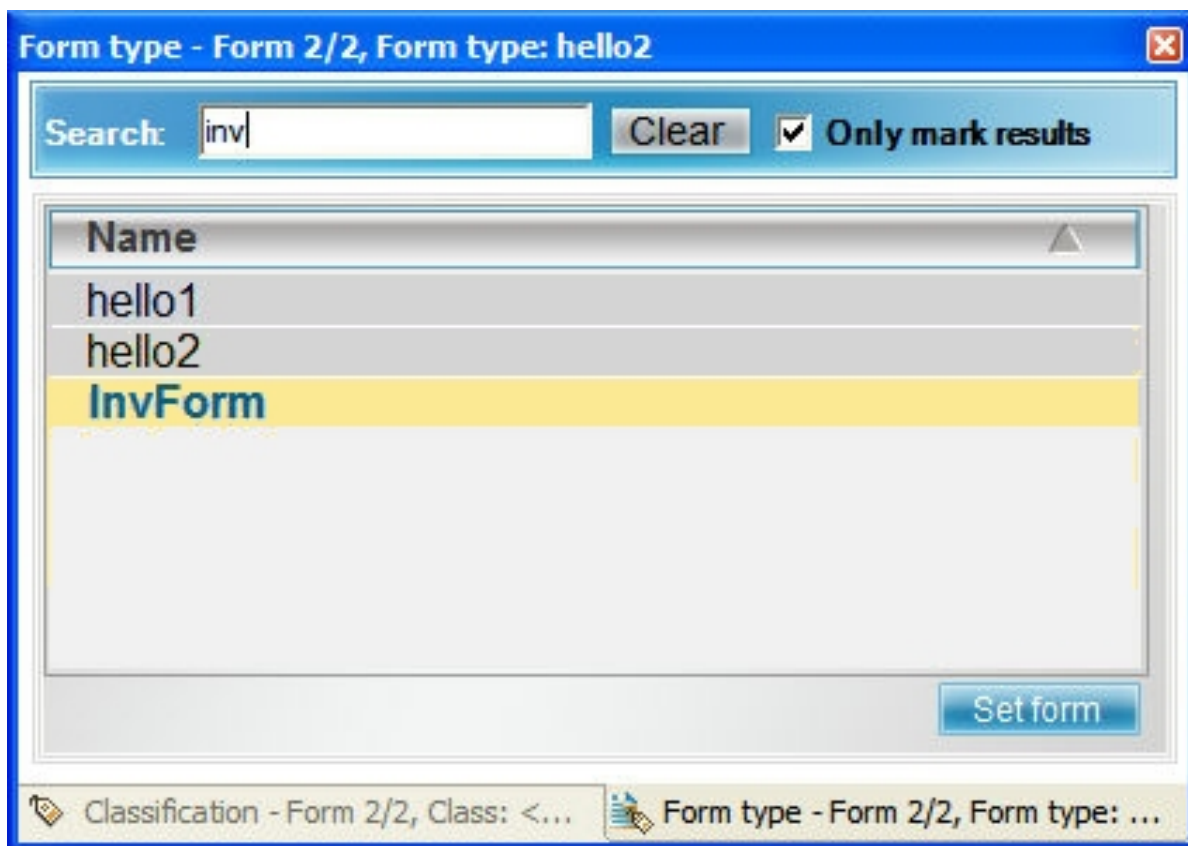
Setting	Description
	Shows or hides the Toolbar view.
	Changes the size of the page thumbnails in the Collections Thumbnails view. <ul style="list-style-type: none">• Drag the slider upwards to make the thumbnails larger.• Drag the slider downwards to make the thumbnails smaller. The thumbnails fill sideways from left to right, so the smaller the thumbnails, the more pages fit on a row in the Collections Thumbnails view.

Setting	Description
	<p>Opens the Data dialog box, in which you can specify which data to display in the interface for collections, forms and pages.</p> 
 	<p>Specifies how forms are displayed.</p> <p> Displays the forms one below the other, even if there is enough room in a row to display more than one form and its pages. This arrangement is useful for examining each form separately from its neighboring forms.</p> <p> Fills each row with forms, one beside the other, until the row is full. This arrangement is useful for displaying as many forms as possible in a limited area.</p> <div style="background-color: #e0f2f1; padding: 5px; border: 1px solid #ccc;"> <p> Forms are filled sideways only within a single collection. Different collections always start on a new row.</p> </div>
<input checked="" type="checkbox"/>	<p>Select or clear the check box to show or hide the associated data.</p>

Form type view

This view lets you assign a form type to a form or page. Form types are a method of classifying forms.

1. In the **Collections Thumbnails** view or **Collections Tree** view, select one or more forms or pages.
2. Select the form type in the list and click **Set form**.



You can search for a form type: Type the form type name in the **Search** box. The search results are displayed.

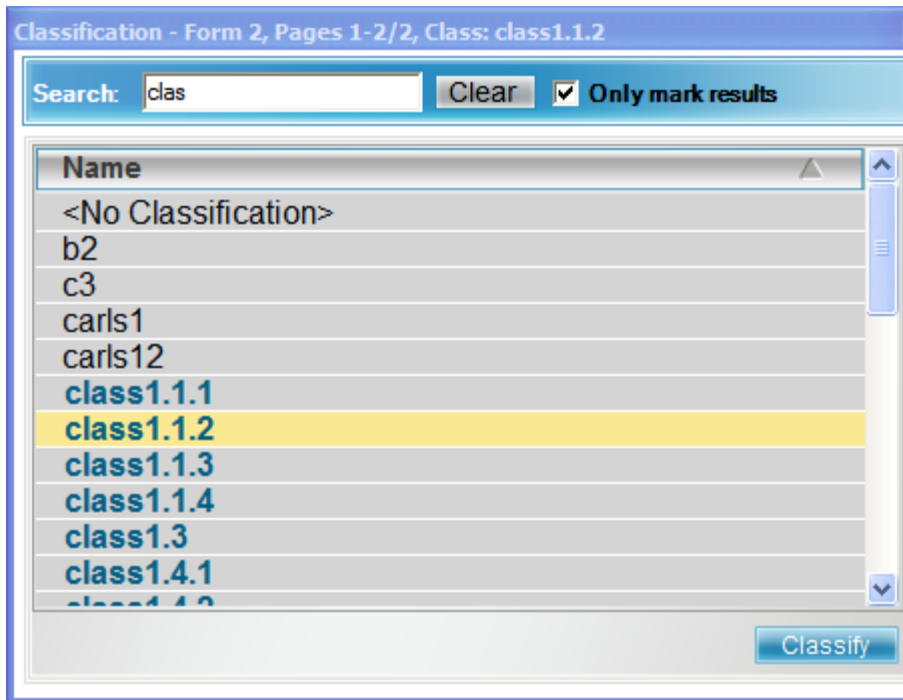
- If **Only mark results** is selected, all form types are displayed but only the ones that correspond to the search item are highlighted.
- If this option is clear, only form types that correspond to the search term, are displayed.

To clear the search results and display all form types again, click **Clear**.

Classification view

This view lets you assign a classification to a form or page.

1. In the **Collections Thumbnails** or **Collections Tree** view, select one or more forms or pages.
2. Select the classification in the list and click **Classify**.



You can search for a classification: Type the classification name in the **Search** box. The search results are displayed.

- If **Only mark results** is selected, all classifications are displayed but only the ones that correspond to the search item are highlighted.
- If this option is clear, only classifications that correspond to the search term, are displayed.

To clear the search results and display all classifications again, click **Clear**.

Page view

The Page view displays the currently selected page in the **Page** tab, and its associated EFI in the **EFI** tab. The selected page has an associated EFI only if it belongs to a form whose form type possesses an EFI.

You can use the following controls to work with pages or EFIs in the Page view.

Control	Description
	Zoom in or out: Increases or decreases the magnification of the selected page. Click the buttons or use the slider to change the magnification.
	Fit/unfit page: Changes the page magnification to fill the expanse of the Page view display window, irrespective of the current zoom setting. Click this button again to return the page to the current zoom setting.
	Deskew: Straightens the image if it shows a slant from its correct orientation.
Replace page sides	Swaps the front side of the selected page with its reverse side, so that what was the front side becomes the reverse side and what was the reverse side becomes the front side. This control is operational for double sided pages only.
	Rotates the page 90 degrees to the left (anti-clockwise) or to the right (clockwise). Simple attachments, such as TIFF, DIF, REG, and JPG files, are rotated together with the page. Complex attachments, such as Microsoft Word documents, are not rotated. i This control appears also in the Collections view. However, there is a difference in their functions. The Rotate command in the Page view rotates only the displayed page, whereas the Rotate command in the Collections view rotates all selected pages.
Set/Unset attachment	Toggles between the Set attachment and the Unset attachment command. Set attachment applies an attachment to the Selected Page. The presence of an attachment is indicated by a paperclip icon. Unset attachment deletes the attachment to the Selected Page. The paperclip icon will disappear.
	Moves to the next or previous page.

Assign an EFI to a page.

1. In the **Collections Thumbnails** or **Collections Tree view**, select one or more pages.
2. On the EFI tab, select the EFI in the list and click **Set EFI**. Alternatively, double-click the EFI.

You can search for an EFI: Type the EFI name in the **Search** box. The search results are displayed.

- If **Only mark results** is selected, all EFIs are displayed but only the ones that correspond to the search item are highlighted.
- If this option is clear, only EFIs that correspond to the search term, are displayed.

To clear the search results and display all EFIs again, click **Clear**.

Select objects

You can select multiple objects, such as pages or forms, before performing an action on them. Whether multiple selections are possible depends on the object and the view.

- To select a set of consecutive objects, click the first object, hold down the Shift key, then click the last object.
- To select a set of non-consecutive objects, hold down the Ctrl key, then click each object you want to select.

Arrange pages and forms

You can change the position of pages within the same form, or move pages to a different form. Similarly, you can change the position of forms within a collection, or move forms to a different collection. You cannot change the order of collections.

Move a page

In the **Collections Thumbnails** view or **Collections Tree** view, drag the page to the new position.

The pages are automatically renumbered to reflect their new position.


Move a form

In the **Collections Tree** view, drag the form to the new position.

The form pages are moved together with the form.



Work with collections

The context menu that appears when you right-click a collection enables you to perform the following actions.

Menu item	Description
Remove collections	Deletes the selected collections.
Merge collections	Merges the selected collection with the collection that follows it to create a single collection. The forms of the second collection are added to first collection and the second collection is deleted. The original order and attributes of all the forms are maintained.  The final collection of the collection list does not offer this operation.
Rename collection	Opens a dialog box in which you can enter a new name for the collection.



Work with forms

The context menu that appears when you right-click a form enables you to perform the following actions.

Menu item	Description
Remove forms	Deletes the selected forms.
Merge forms	<p>Merges the selected form with the form that follows it to create a single form. The pages of the second form are added to first form and the second form is deleted. The original order and attributes of all the pages are maintained.</p> <p> The final form of a collection does not offer this operation.</p>
Merge collections	<p>Merges the selected collection with the collection that follows it to create a single collection. The forms of the second collection are added to first collection and the second collection is deleted. The original order and attributes of all the forms are maintained.</p> <p> The final collection of the collection list does not offer this operation.</p>
Split collection	<p>Splits the current collection at the currently selected form. The selected form becomes the first form of the new collection; thus the new collection follows the previously selected collection.</p> <p>When the current collection is split, the result is the current collection (but without the forms from the 'split position' and onwards) and a new collection that follows. The current collection retains all its attribute values, whereas the newly created collection's attributes are zeroed.</p>
Insert missing pages	Inserts pages at the selected point and marks them as "Missing". A dialog box opens in which you can specify how many pages to insert and whether they should be inserted before the selected page or after it.

Work with pages

The context menu that appears when you right-click a page enables you to perform the following actions.

Menu item	Description
Remove pages	Deletes the selected pages.
Merge forms	<p>Merges the selected form with the form that follows it to create a single form. The pages of the second form are added to first form and the second form is deleted. The original order and attributes of all the pages are maintained.</p> <p> The final form of a collection does not offer this operation.</p>
Merge collections	<p>Merges the selected collection with the collection that follows it to create a single collection. The forms of the second collection are added to first collection and the second collection is deleted. The original order and attributes of all the forms are maintained.</p> <p> The final collection of the collection list does not offer this operation.</p>
Split form	<p>Splits the current form at the currently selected page. The selected page becomes the first page of the new form; thus the new form follows the previously selected form. When the current form is split, the result is the current form (but without the pages from the 'split position' and onwards) and a new form that follows. The current form retains all its attribute values, whereas the newly created form's attributes are zeroed.</p>
Set attachment	Applies an attachment to the selected page. The presence of an attachment is indicated by a paperclip icon.
Unset attachment	Deletes the attachment of the selected page. The paperclip icon disappears.
Replace page sides	Available for double sided pages only. Swaps the front side of the selected page with its reverse side, so that what was the front side becomes the reverse side and what was the reverse side becomes the front side.
Insert missing pages	<p>Inserts pages at the selected point and marks them as "Missing". A dialog box opens in which you can specify how many pages to insert and whether they should be inserted before the selected page or after it.</p> <p>The new missing page takes up a page place but does not as yet have any definition. It possesses an entry, but however it remains tagged as "Missing Page" until a main attachment is assigned to it.</p>

Menu item	Description
Rotate left	Rotates the page 90 degrees to the left (anti-clockwise). Simple attachments, such as TIFF, DIF, REG, and JPG files, are rotated together with the page. Complex attachments, such as Microsoft Word documents, are not rotated.
Rotate right	Rotates the page 90 degrees to the right (clockwise). Simple attachments, such as TIFF, DIF, REG, and JPG files, are rotated together with the page. Complex attachments, such as Microsoft Word documents, are not rotated.
Cut	Cuts the selected pages and stores them in the clipboard. The cut pages only disappear from their old position when they are pasted into a new position.