

eFLOW 5.2

New features	3
Installation	3
Setup and STS Configuration Data Storage	3
Domain Security Configurator	3
Setup Attachments Manager	4
STS Management	4
Offline Scanning	4
Tis Fuzzy Server	4
TiS Fuzzy Server Manager	4
Dynamic Templates	5
Scan Service	5
Export to SQL server	5
Improvements and additions	5
Basic configuration	5
Core	6
Launch	6
Supervise	7
Organize	7
Analyze Free	7
Analyze Recognition	7
Recognition	8
Data Entry	8
Web Validate	8
Web Scan	8
Deliver	8
ShowCase Demo Application	8
Bug fixes	8
Installation instructions	9
Upgrade procedure	9
Before upgrade	9
Installation	10
Application	10
Customization	10
Known issues	10
Installation	10

Release Notes



eFLOW 5.2

HTTPS SSL Self-Signed Certificates	10
eFLOW certificates	10
STS Management	10
Collect	10

eFLOW 5.2

eFLOW 5.2 is a major update that includes new features, improvements and fixes for reported issues.

New features

Installation

Secure Communication

HTTPS is selected in the eFLOW installation as the default communication protocol.

The eFLOW server installation allows you to either create a new self-signed SSL certificate or select one of the existing certificates.

Tis Fuzzy Server

The full eFLOW installation now includes the separate TIS Fuzzy Server installation package.

The Tis Fuzzy Server installation can be started from the eFLOW Installation Launcher.

Setup and STS Configuration Data Storage

It is now possible to store eFLOW setup and configuration data in the SQL database.

Basic configuration parameters

Set the `<UseDynamicSQL>` parameter to **true** to store the setup and configuration data in the SQL database. By default, it is **false**.

The value of `<UseDynamicSQL>` affects both the setup and dynamic data storage types.

It is not possible to store the setup data in the file system and dynamic data in the SQL database, or vice versa.

We recommend using the same values in the `...eFlow_5\ConfigSources\TisConfiguration.config` and `...TisDefaultSTS\ConfigSources\TisConfiguration.config` configuration files.

If necessary, you can use different settings. In this situation, the setup data and security configuration files will be saved in different locations.

What happens when the storage type is changed

When the `<UseDynamicSQL>` property is changed to **true**, eFLOW uploads all setup files to the SQL database.

Two new tables are added to the **eFlow_Management** database: one table contains the setup data and another contains the eFLOW domain security configuration.

The storage type is changed for all eFLOW applications, including the system application.

To apply the changes immediately, restart IIS.

Utilities

Domain Security Configurator

eFLOW 5.2

Once the domain security configuration files are saved in the database, there is no option to edit them manually.

Use the Domain Security Configurator utility to change the security settings.

Setup Attachments Manager

Once the setup data is saved in the database, you cannot simply copy additional custom files to the setup folder.

Use the Attachments Manager in Design to add custom files to the application setup.

STS Management

STS Management is a server-side utility that helps to configure user roles and permissions.

This utility is essential when the `<UseDynamicSQL>` property is set to **true** because it provides access to the security configuration information saved in the database.

To configure user roles and permissions:

1. Open the *STSMangement.exe* file from *C:\inetpub\wwwroot\Tis Web Site\TisDefaultSTS\Bin*.
2. Select the eFLOW application to be configured.
3. Select the user roles you want to apply.
4. Select a user or a group from the active directory list.
5. Define the user roles.

Offline Scanning

A new Scan station feature allows users to continue scanning images even if the connection with the eFLOW server is temporarily lost.

The scanned images are sent to the server when the connection is restored.

To enable this feature, check the **Enable offline mode** checkbox in the station configuration.

Tis Fuzzy Server

TiS Fuzzy Service is a smart search engine that implements an approximate string matching algorithm. It is able to perform the search in huge databases (up to 50 million records).

TiS Fuzzy Server is a web application running TiS Fuzzy Service. This application can process requests for string matching from several clients.

TiS Fuzzy Web Server allows you to update the data without restarting the eFLOW server.

TiS Fuzzy Service usage:

- Recognition Workflow customization code as a string matching search engine.
- Data Entry lookup tables.

TiS Fuzzy Server Manager

TiS Fuzzy Manager is designed to run on client machines. It requires administrator permissions.

TiS Fuzzy Manager creates a configuration file that contains the database and its columns.

eFLOW 5.2

The user can stop or restart the TiS Fuzzy Server from the management application.

Dynamic Templates

A new technique of form and field recognition that allows learning new documents at runtime. Can be applied to structured and semi-structured forms.

The learning process is based on the real production forms and not on the empty forms prepared beforehand (EFI).

No design time station configuration is required.

The recognition rate increases with time as the station improves the data model.

The Dynamic Templates activity pulls the data from the model every 5 minutes. This is done in the background, so there is no need to logout/login to the recognition station to receive the updated data.

The Dynamic Templates station should be placed before the Free Collect station in the workflow.

Scan Service

A new standalone scanning service that may be added to any eFLOW station.

Currently, it allows scanning from the Organize station only.

Export to SQL server

Configuration builder defines how the collection data will be saved in the SQL database.

It is possible either to map collection fields to database columns or define the stored procedure parameters.

Improvements and additions

Basic configuration

Configuration files structure

The structure of basic configuration files (*TisConfiguration.config*) was changed to provide better control of configuration parameters.

An eFLOW 5.2.0 fresh installation creates the new configuration files that include all the properties set during the installation, such as application paths, SQL server name, etc.

Client Profiles

A new section `<eFlowClientProfilesConfig>` was added to the server side basic configuration. This section contains the client side parameters that can be configured from the server.

It is possible to create several client profile sections with different names. When the configuration file is created, it contains only the **Default** client profile.

Platform configuration

The `<eFlowPlatformConfig>` section contains the parameters required by both the clients and the server.

eFLOW 5.2

Server configuration

The `<eFlowPlatformConfigServer>` section contains the parameters required only by the server.

Client configuration

The `<eFlowClientConfig>` section includes parameters required only by the client.

The `<ProfileName>` parameter contains the name of the relevant client profile section name configured on the server.

Core

MSDTC

The `<NoMsDtc>` server side basic configuration property indicates whether eFLOW will use MSDTC.

By default, eFLOW does not require MSDTC and `<NoMsDtc>` is set to **true**.

We recommend using MSDTC only if it is explicitly required by the project.

TiS log

The log messages structure was improved to include the process ID, machine name, user name, eFLOW station and logged in application name.

The log message contains the reference to the affected collection every time the collection is sent to the **Reject** queue.

Huge collections

Managed more efficiently than in previous eFLOW versions.

AppFabric services are no longer used, and temporary data is now stored in the database.

Autorun stations secondary node

It is possible to configure the autorun stations so that in the case of primary node failure, the stations will continue running on another node. When the primary node is restored, the autorun stations return to running on this node.

The Administrate station user interface was changed to allow adding the secondary node to the autorun station configuration.

Launch

Stations are displayed according to user permissions:

- **Run & Execute:** visible and enabled.
- **Read:** visible and disabled.
- **No permissions:** the user will not see them in the station list.

eFLOW 5.2

Supervise

SLA calculator

A new functionality that helps to calculate the SLA settings and assignments.

Settings calculator:

- The required number of collections per minute (CPM).
- The required number of pages per minute (PPM).
- The total number of collections per SLA work unit (hour/minute/time interval).

Assignment calculator:

- Queue level assignment calculation.
- The calculation is done semi-automatically.

SLA view improvement

SLAs are wrapped to fill the view instead of being stacked by the application.

Refreshing the results display

It is possible to refresh the results on demand. Previously you had to wait until the time interval passed in order to view updated results. The button is disabled for the first few seconds after the refresh.

Custom alerts

It is possible to create customization DLLs that contain user-defined station alerts.

Demo application

A new eFlow demo application that demonstrates the Supervise functionality.

Organize

Improved image manipulation stability and performance.

External classes tree.

Organize is now able to work with external (predefined) classes. Previously, it was dependent on the Smart model.

Analyze Free

New UI features that improve the understanding of the station functionality:

- Improved main screen navigation.
- Enhanced data filtering.

Analyze Recognition

Customized events invocation:

eFLOW 5.2

- The user can decide to invoke events from specified stations in the recognition workflow.
- The following events are invoked: OnLogin, OnPostGet, OnPrePut.
- The station compares collections that were processed using different events.

Recognition

A new output variable was added to eFLOW built-in Integra and Freedom recognition activities. This variable contains the information per page and holds the selected EFI or script name.

Parallel virtual OCR engines: Added the ability to run FullPage OCR engines in parallel. This is done automatically by the system and does not require any configuration.

Data Entry

JPG attachments

Only the relevant JPG images are downloaded when the user switches to JPG mode.

Previously, the user had to select JPG as a station attachment.

Collection filter

The list of available collections can be filtered and sorted.

Users can select the collections they are planning to work on.

Web Validate

The application retrieves the data for the InvoiceReader search dialog from the database instead of using the browser cached data.

Web Scan

Added the OnSetCollectionName event.

Deliver

When the export fails, the station collections are put on hold.

In previous versions, when the export station failed, the collections disappeared from the system.

ShowCase Demo Application

A new ShowCase demo application that incorporates basic examples of Freedom, Integra and Smart modules, along with simple validations.

Installation and usage instructions can be found in the documentation folder of the application.

Bug fixes

This release contains numerous bug fixes. See the separate document *eFLOW 5.2 Fixed Issues* for details.

eFLOW 5.2

Installation instructions

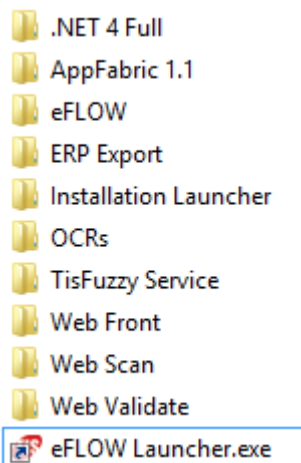
The eFLOW 5.2.0 installation package can be downloaded from the TIS FTP site.

1. Read carefully the eFLOW 5.2.0 Release Notes before you proceed with the installation.
2. Download and unzip the eFLOW Platform Installation.
3. If you are planning to run Web stations, download and unzip the relevant Web station installations.

Note: It is necessary to unblock cookies in Google on machines running Web Validate, Web Scan or Web Front Office servers.

4. If you will be using Tis Fuzzy Server, download and unzip the relevant installation.
5. Download and unzip the OCR Engines Installation.

OCR engines should be copied to the installation root folder so that the full folder structure looks as follows:



6. Start the eFLOW Installation Launcher by clicking on the eFLOW Launcher shortcut.

Upgrade procedure

Before upgrade

1. Export the application CAB.
2. Backup the existing *TisConfiguration.config* and *Web.config* configuration files.

Important: Any configuration parameters that are not defined during the installation (for example, timeout intervals, etc.) will retain the default values. If non-default values were defined previously, they should be copied manually after the installation to the relevant *TisConfiguration.config* file.

3. Make sure that there are no collections in the system.

eFLOW 5.2

Installation

The eFLOW 5.2.0 installation performs the upgrade from the eFLOW 5.1.0 and eFLOW 5.1.0 SP1 versions. There is no need to apply special update command line parameters or uninstall the existing version.

We recommend uninstalling eFLOW 5.0.1, 5.0.2 or 5.0.3 before installing eFLOW 5.2.0.

Application

Reinstall the application CAB.

Customization

Recompile the custom stations with the new version of eFLOW core DLLs.

Known issues

Installation

No error message is issued when the user does not define an existing SSL certificate after selecting the HTTPS protocol. The installation continues successfully, but, as a result, the HTTPS binding is not configured properly.

The problem can be easily fixed after the installation by editing Tis Web Site bindings in IIS.

HTTPS SSL Self-Signed Certificates

HTTPS SSL self-signed certificates created by the eFLOW installation may become invalid after a system reset or under other circumstances.

In this case, it is necessary to create a new self-signed certificate and connect it to the HTTPS binding of the TIS Web Site.

eFLOW certificates

eFLOW Web stations use the same certificates as the eFLOW server. As a result, if one of the products is uninstalled, the certificates are removed, even if they are used by other products.

If eFLOW STS certificates were removed, they can be easily reinstalled. See *Install eFLOW certificates* in the *eFLOW Implementation Guide*.

STS Management

Roles are not implemented.

Collect

The user has to click **Pause** twice to pause the file input.

The station is not loaded if the automatic collection path does not exist.