Laserfiche

Laserfiche User Training Manual

1. Using the Folder Browser

The Folder Browser is one of the primary places for working with documents and folders in Laserfiche. All documents in the repository are stored within the folder browser, and therefore it is important to be able to navigate the folder browser quickly.

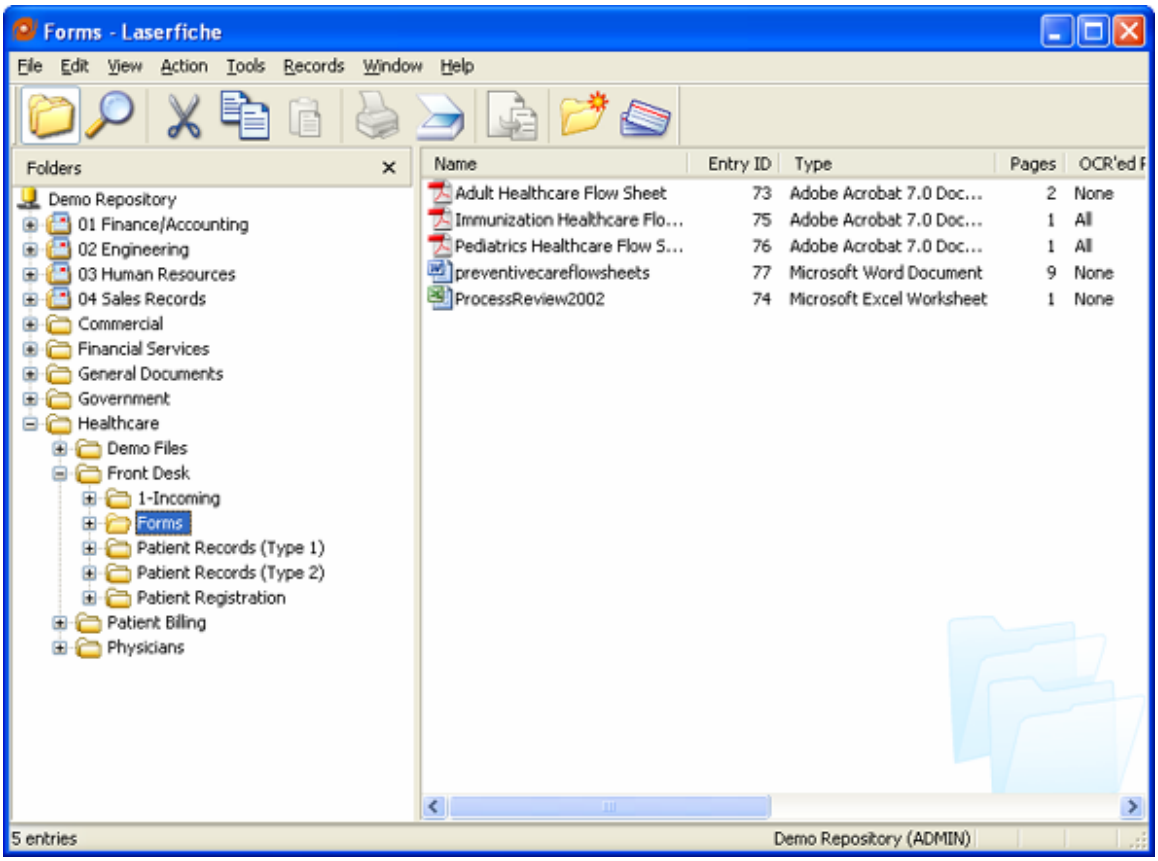


Figure 1: The Laserfiche Folder Browser

1.1. Designing a Folder Structure

The folder tree is the first thing most users will see when they log in to a Laserfiche repository. Because it is the primary interface with the repository, it is extremely important that it be well-organized. It should be easy for users to decide where a document should be placed, and it should be intuitive to locate existing documents.

The first thing to consider when designing a folder structure is who will be accessing those documents. The folder structure should be understandable and accessible for all users. Consider not only the users who will be working with the system daily, but also the users who will work with it less frequently. If you will be using WebLink to make the repository available to the general public, you should also keep those users in mind. The filing and naming structure should be as self-explanatory as possible. This will allow users to find the documents they need quickly.

For example, a city council's repository will be primarily used by the city council members and staff, but will also be accessed by the public using WebLink. Each document type – agenda, resolution, deed, ordinance, et cetera – is classified with a numerical code. However, using these codes as folder names wouldn't be a good idea: although the council members and staff could readily identify them, members of the public would have trouble navigating them. A member of the public looking for the city council agendas wouldn't necessarily know that 1047759-1 was the code for agendas. If the folder was called "Agendas," however, even users who had never seen the repository before would be able to locate the correct documents.

You can also use shortcuts to help make your folder structure more intuitive. Shortcuts allow you to structure your repository such that it is usable in different ways. For instance, you might have a set of folders that contain all the supplementary reports for agendas. You want to store those reports in the same dated folders as the agendas, so that members of the public can quickly find them using WebLink. However, you might also want the city clerk who must work with the reports to have quick access to them. You might also want to be able to find the report in the folder corresponding to the report's subject – for instance, building plans in a Building Plans folder. Keeping separate copies in these folders would quickly become unmanageable. Instead, you could place the report in one of the folders – for instance, the Building Plans folder – and then place shortcuts in the agenda folder and the city clerk's personal folder.

1.2. Navigating the Folder Browser

Like in Microsoft Windows, documents in Laserfiche are contained within folders, which may in turn be contained within other folders. The structure of folders is called a folder tree. As in Windows Explorer, the entire folder tree can be seen in a folder pane on the left side of the screen, while the contents of the folder you have selected – both documents and folders – is in the contents pane on the right side of the screen.

You can use keyboard shortcuts to quickly navigate and perform various actions in Laserfiche. Many users find keyboard shortcuts to be significantly more efficient than using the mouse. See Section 11. Appendix: Keyboard Shortcuts for an overview of useful shortcuts in Laserfiche.

1.2.1. Navigating the Folder Pane

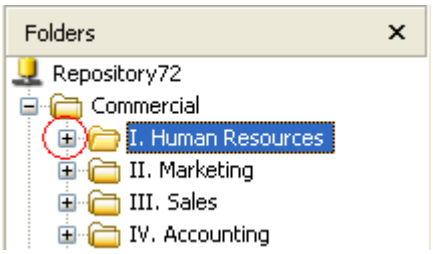


Figure 2: Expanding Folders in the Folder Pane.

You can move between folders simply by selecting them in the folder pane. To see a folder's subfolders, you can either double-click the folder, or click once on the plus sign to the left of the folder icon. You can also navigate between folders using the keyboard: use the ENTER key to expand a folder and see its subfolders, and the UP and DOWN keys to move between visible folders. For more information on keyboard shortcuts, see Section 11. Appendix: Keyboard Shortcuts.

1.2.2. Navigating the Contents Pane

When you have selected a folder, the documents and folders within that folder are visible in the contents pane. As in the folder pane, you can click on documents or folders to open them, or you can use the keyboard to navigate. In addition to showing the name of the document or folder, the contents pane can display a number of other pieces of information, such as document type, number of pages, and volume. You can reorder the columns by selecting one and dragging it left or right. You can also sort documents based on the column information by clicking on the column. For instance, clicking on the Type column will sort by document type. By default, the column will be sorted in ascending order, but clicking it again will change it to sort in descending order.

Figure 3: A Column in the Contents Pane

1.2.3. Tips for Creating an Easy-to-Use Folder Structure

In order for a folder structure to be easy and intuitive to use, users should be able to locate relevant information after only a few quick decisions. To facilitate that, here are some tips for creating your folder structure:

- **Self-explanatory folder and document names**. The name scheme for your folders and documents should be as understandable as possible. For instance, in the example above, you should use the word 'Agendas' for the folder rather than the agenda document code number, because the code is only comprehensible to a few people but the word is comprehensible to all users. Similarly, it would be easy to find the city council meeting minutes for a particular year if the document name for minutes were of the format "Minutes – City of Utopia – 11/14/05."

- **Fewer choices at higher levels**. The more folders there are in the higher levels, the more difficult the user's first choice is. If a user is confronted with fifteen folders as soon as they open the repository, they will need to scan over all of them and decide which is most relevant. If there are only a few clearly-defined folders, they will be able to make the first choice much more quickly and accurately.

- **Folder ordering.** Laserfiche sorts documents and folders alphanumerically. You can use this sorting mechanism to order your folders in the way most useful to you. Thus, if you want to display folders in a particular order, you can preface the folder name with a number. If you have three folders – Engineering, Accounting, and Human Resources – and you want them to display in that order, you could name them "1. Engineering," "2. Accounting," and "3. Human Resources." Similarly, if you have folders for every employee in your company, and you wish them to be sorted alphabetically by last name, you could name the folders after the employees, last name first.

- **Autonaming**. Using the autoname feature allows you to automatically give documents names that reflect aspects of their content. For more information on autonaming, see Section 5.2.4. Autonaming.

1.3. Managing Folders and Documents

1.3.1. Creating Folders and Documents

Folders and documents can be created from within the Folder Browser. To create a document or folder, you must first have the appropriate permissions: the entry access right Create Documents or Create Folder.

To create a document or folder, first navigate to the folder in which you wish to create the new entry. Then, select the **File** menu and choose **New**. This will open a sub-menu. Choose **Folder** or **Document**. You can also access the **New** sub-menu by right-clicking within the folder. If you are creating a new document, the **New Document** dialog will appear; see Section 1.3.1.1. New Document Dialog for more information. If you are creating a new folder, the folder will immediately be created; once it has been created, you can type a new name for it.

Documents created in this way are 'empty' – in other words, they do not have any associated image pages or electronic document files. Generally, you will instead create documents with pages, by scanning or importing documents into the repository. See Section 5. Importing Documents and Section 8. Scanning for more information.

1.3.1.1. New Document Dialog

When you create a new document, the New Document dialog will open. This dialog allows you to customize the new document and add metadata to it.

Name. Type the name of the new document. If you have configured **Autoname** options (see Section 5.2.4. Autonaming), your autoname will be supplied by default.

Figure 4: The New Document dialog.

General. This tab allows you to specify which folder and volume to create the document in. The folder you currently have open will be listed as the default, but you can type or browse to another folder. If you type the name of a folder that does not currently exist, the folder can be created. Finally, you can choose whether or not to index the new document. Documents with text must be indexed before you can locate them with a full-text search. (If the repository is configured to automatically index new documents, this option will be selected and greyed out.)

Fields. In this tab, you can choose a template for the new document and input template field information. For more information, please see Section 3.1. Templates.

Tags. In this tab, you can apply security or informational tags to the new document. For more information, please see Section 3.2. Tags.

1.3.2. Creating Shortcuts

A shortcut is a pointer to another document or folder in the repository. Shortcuts allow you to store a document in one place in your repository, but allow users to access it from one or more other places. For instance, you might store all of your loan applicants' documents in a Loan Applications folder, but place shortcuts in the personal folders for your loan officers, so they can quickly access the applications they are handling.

To create a shortcut to a document or folder, right-click the document or folder and select **Copy**, or select **Copy** from the **Edit** menu. Navigate to the folder in which you want to create the shortcut. Then, either right-click and select **Paste Shortcut**, or select **Paste Shortcut** from the **Edit** menu.

1.3.3. Moving Folders and Documents

While using a repository, you may need to move documents or folders from one folder to another. You can simply select an item or items and then drag and drop them into the destination folder, just as you would in Windows Explorer. You can also use the **Cut** and **Paste** commands in the **Edit** menu to 'cut' the document or folder from one location and 'paste' it to another. If you are moving a folder, all of the documents within that folder, and all subfolders and their contents, will be moved as well.

1.4. Customzing the Folder Browser

You can customize many of the display options for the folder browser from the Browser Options menu. To open the Browser Options dialog, open the **Tools** menu and select **Options**, then click the Browser icon in the **Options** menu. The Browser Options dialog allows you to configure the appearance of the Laserfiche Client's folder tree and folder browser.

Column Display: You can configure the default columns that are displayed in the folder browser for folders and documents. This allows you to display some or all of the template field values as well as more general information. Under **Column display should be…**, select **The same for all folders** if you want a consistent column display, or **Remembered for each folder** if you want the ability to customize column display for each folder.

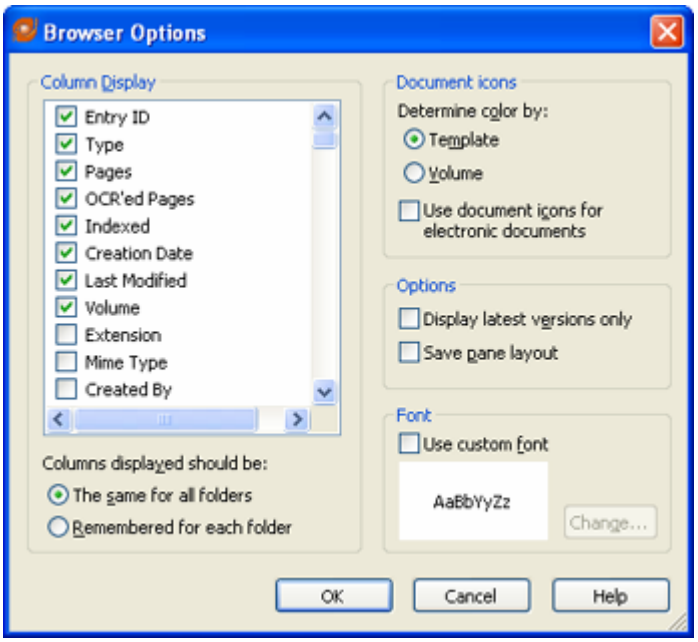


Figure 5: The Browser Options dialog.

Document icons: The Laserfiche document icon's color depends on the features of the document itself. This setting allows you to determine whether you want all of the documents from the same volume to have the same color, or all of the documents with the same template to have the same color. The **Use document icons for electronic documents** check box controls the icon display for electronic documents. By default, electronic documents are displayed using the icon associated with their native file format – Microsoft Word documents display the Word icon, and so on. If you select the 'Use document icons' option, however, electronic documents will be displayed with Laserfiche document icons.

Options: The **Display latest version only** option allows you to specify that only the most recent version of a document should be visible. See Section 3.4. Versions for more information on versions. Checking the **Save pane layout** box configures the Laserfiche Client to remember whether the Folder Browser or Search panes were open when the Client was last closed, and to open the Client to that pane. If the box is cleared, the Client will always open to the folder browser.

Font: The Laserfiche Client uses the same font for the folder browser display as the default Windows Explorer font. By selecting 'Use custom font,' you can customize the font display to choose the text font, size and style you prefer. Click Change to specify the text font, size and style.

1.4.1. Managing Prompts

In many cases, dialog boxes in the Laserfiche Client have a check box that can be selected to prevent the dialog from appearing in the future. The check box is usually called **Don't ask me again** or **Do not show this dialog again**. If this option is selected, the dialog will not be presented to the user again. In most cases, the option selected at the time the **Do not ask me again** box is checked will be used as the default option in future cases.

In addition, certain prompts can be turned on or off by selection **Options** from the **Tools** menu and then clicking the **Prompts** icon. These settings will apply to all repositories accessed by that particular Windows users on that computer; other Windows users and users on other computers will not be affected and can configure these prompts independently.

Figure 6: The Prompt Options dialog.

For instance, a user who frequently moves items from one folder to another might wish to speed up the process by eliminating the **Move / copy / shortcut** prompt. He or she could either check **Don't ask me again** when next moving an item, or open the Prompts option dialog and uncheck **Move / copy / shortcut**.

If you would like to turn on a prompt that had previously been turned off, there are two options. If the prompt is one that is listed in the **Prompts** option dialog, you can select it; this will cause the prompt to appear in the future. If it is not, you can click the **Reset** button in the **Prompt Options** dialog. Note that this will turn all prompts back on; you will need to again disable any prompts you do not wish to see.

1.4.2. Customizing the Toolbar

You can add, remove or rearrange the buttons displayed in the toolbar of the Folder Browser. To do so, select **Options** from the **Tools** menu, and click on the **Toolbar** icon. This will open the **Customize Toolbar** dialog box. In this dialog, you can select buttons you would like to add to the toolbar from the **Available toolbar buttons** option and click the **Add** button, or you can select buttons you would like to remove from the **Current toolbar buttons** option and click the **Remove** button.

If you customize the toolbar from within the folder browser, you will customize the folder browser toolbar. If you open the document viewer and then open the **Customize Toolbar** dialog box from within that document, you will customize the document viewer toolbar.

You can also determine whether toolbar icons should be small or large, whether they should have text labels, and where on the screen the toolbar should be positioned.

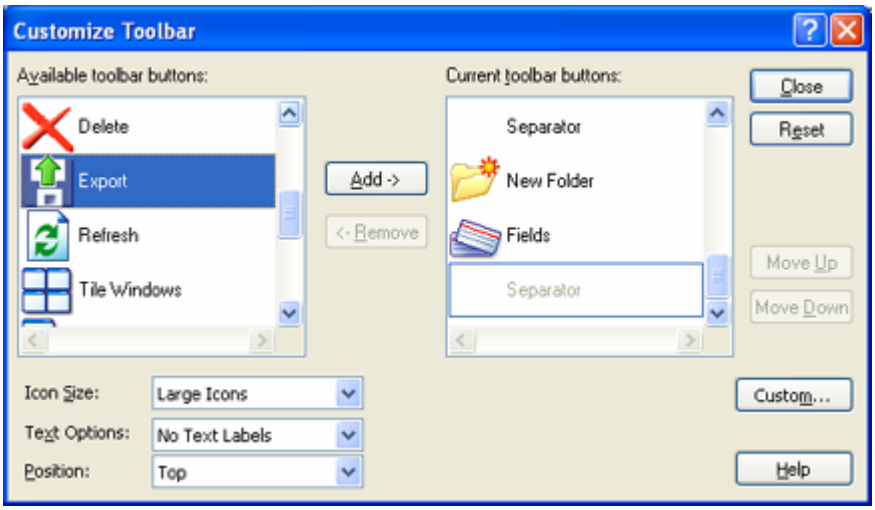


Figure 7: The Customize Toolbar dialog.

1.4.2.1. Creating a Custom Toolbar Button

To create a custom button, open the **Customize Toolbar** dialog and click the **Custom** button. This will open the **Toolbar Button Properties** dialog.

The Toolbar Button Properties dialog has three options: **Name**, **Command** and **Icon**. In the **Name** option, type the name you would wish to associate with the new custom button. In the **Command** option, type or browse to the path to the application you wish the button to open. For instance, to create a button to open Internet Explorer, you would input the path to the iexplore.exe file, which launches Internet Explorer. Finally, in the **Icon** option select an icon for the application. Many executable files have a number of

icons associated with them; you can select one of these files and then browse the available icons to choose one.

Click Ok to close the **Toolbar Button Properties** dialog. You will need to open a new Client instance for the toolbar button to be implemented. You will then be able to re-open the **Toolbar** dialog and add the new button to your toolbar. Clicking the new button will launch the specified application.

2. Viewing and Working With Documents

You can open documents from the Folder Browser by double-clicking on the document.

2.1. Types of Documents

Broadly speaking, there are two types of documents: documents which consist only of TIFF image pages and text (also called "Laserfiche documents"), and documents which contain a file of another format, such as a Word document or Excel spreadsheet (also called "electronic documents"). Both of these document types can have TIFF image pages, text pages and metadata. Laserfiche documents will always be viewed in the Document Viewer; you can choose how you wish to view electronic documents.

Laserfiche uses an image encoding format called TIFF (Tagged Image File Format), which is a non-proprietary file type that can be opened in most image viewing programs. You can associated additional information, called *metadata*, with your Laserfiche documents and electronic documents.

2.2. The Document Viewer

In the Document Viewer, users with appropriate rights can view and modify Laserfiche documents. You can open up to four panes in the Document Viewer, and move and resize those panes to your liking. The available panes are Image, Thumbnails, Text and Metadata; the panes will be discussed in more detail below.

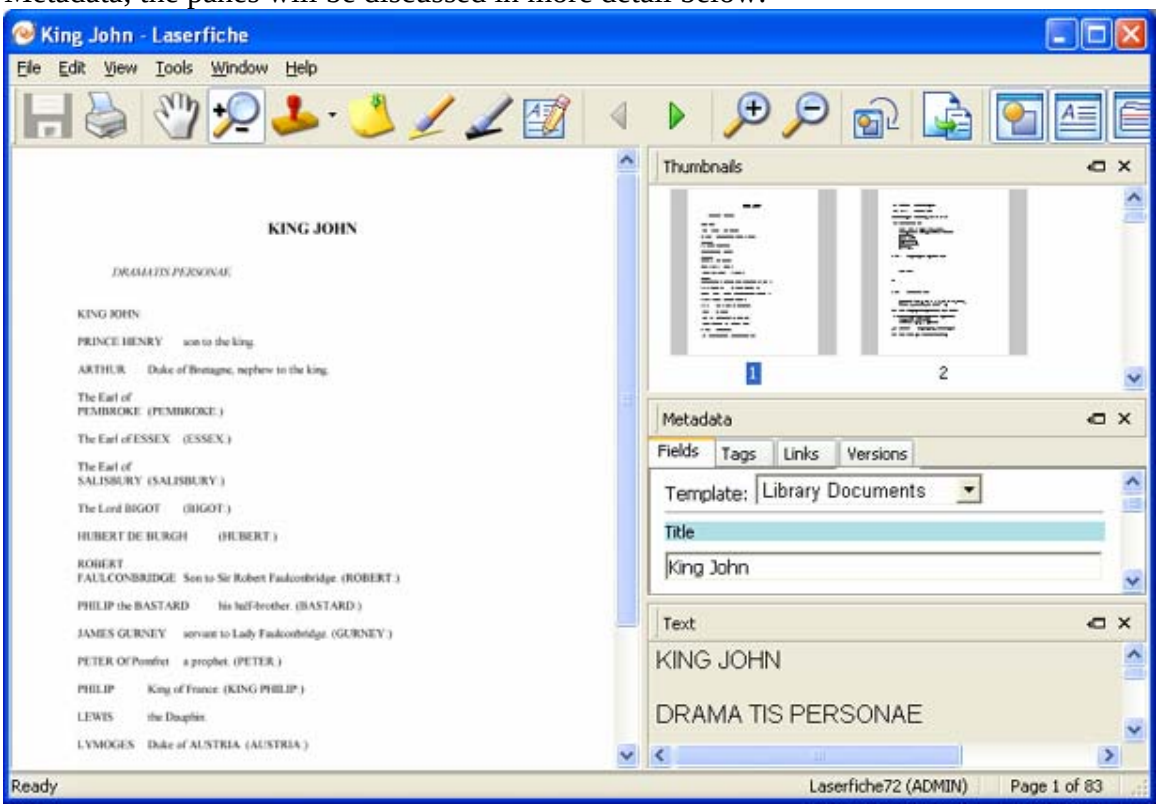


Figure 8: The Laserfiche Document Viewer

To open a pane in the Document Viewer, you can open the **View** menu and select **Views**. You can also use the Document Viewer's toolbar buttons to show or hide the various views.

Figure 9: The Pane Selection Buttons. From left to right: Image, Text, Metadata and Thumbnails.

To close an open pane, you can simply click the 'X' in the pane's upper right-hand corner. To switch the positions of two panes, grab the title bar of one of the panes and drag it onto the other pane. To resize a pane, grab the edge of the pane and drag it to the desired position. You can also undock a pane by clicking the Undock button in the pane's upper right-hand corner. This will open the pane as a new window.

Figure 10: The Undock Button.

2.2.1. Image Pane

You can view the TIFF images associated with a document in the Image pane. The Image pane displays one page at a time, and shows both the image itself and any annotations – such as highlights or sticky notes – that users previously applied to the image. (For more information on annotations, see Section 2.4. Annotations.)

2.2.1.1. Zooming In and Out

Users can take a closer look at sections of the image – or get a broader view of the whole image – using the **Zoom** tool. Select the **Zoom** tool from the Document Viewer toolbar and click on the image to zoom in. If your mouse has a scroll wheel, you can also scroll up to zoom in, or down to zoom out.

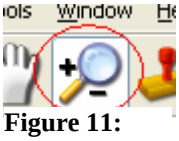


Figure 11: The Zoom Tool.

You can also use the cursor to enclose a certain section of the text. The image will zoom in such that the surrounded section fills the image pane.

You can also configure the default zoom in the settings. This is the size the image will start at when you first open the document. To choose a different default zoom, select the **Tools** menu and choose **Options.** Click **View Documents**. In the **Default image settings** option, choose the zoom level from the "Zoom" dropdown list.

2.2.1.2. Scrolling

If you are viewing an image at a size such that the entire image is not visible on the screen at once, you can scroll up and down to view the whole image. There are two ways to do this. First, you can use the scrollbar on the right side of the image, just as you would in any other application. Second, if you are using any cursor tool except Zoom, you can use a mouse scroll wheel to scroll up or down.

If you are using a scroll wheel, you can also configure the Document Viewer to automatically load the next page when you scroll past the bottom of the page. See Section 2.3. Customizing the Document Viewer for more information.

Figure 12: The Panning tool.

You can also use the **Panning** tool to move around the image. Select the **Panning** tool from the Document Viewer toolbar. You can then use this tool to click on the image and 'drag' it up or down to move your view horizontally or vertically.

2.2.2. Text Pane

The text pane contains text associated with the document. Most of the time, this will be text that has been OCRed from the image pages or extracted from an electronic document. Annotations can be added directly to text, just as they can to the image. (For more information on annotations, see Section 3 Annotations.)

2.2.2.1. Generating Text

There are two fundamental ways to generate text from a document. If the document has image pages, you can perform Optical Character Recognition (OCR) to 'read' the text from the image. If the document has an electronic document portion, you can extract text from the electronic document directly. If there is already text associated with the document – if it has already been OCRed or had text extracted from it, for instance – generating text again will overwrite any existing text.

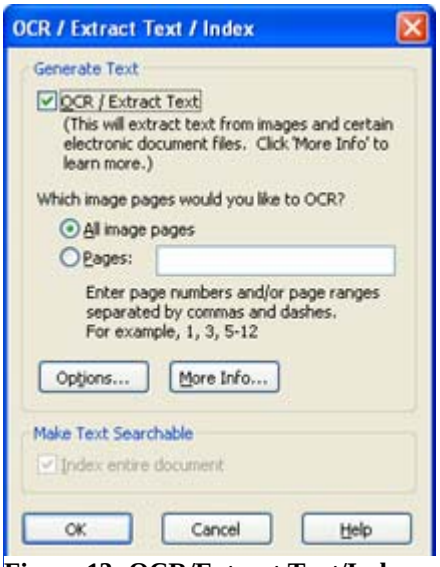


Figure 13: OCR/Extract Text/Index Dialog.

There are several ways to start generating text from a document; however, they all use the same dialog, so you can use any of them with the same results. You can select a document or documents in the Folder Browser and select **OCR/Extract Text/Index** from the **Tools** menu or by right-clicking the document or documents. You can click the OCR button in the Folder Browser. You can open the document and then select **OCR/Extract Text/Index** from the **Tools** menu in the document viewer. You can use any of these methods to either OCR or extract text, and all methods will ultimately open the same dialog.

In order to OCR or extract text from the document, the first box must be selected. (There are extremely few situations in which you would want to uncheck the box, in fact; generally, you should make sure that it remains checked.) You can determine whether you want to OCR all the pages in the document or only selected pages. In many cases – particularly for scans of text documents – you will want to OCR all pages. However, if you know that certain pages are image-only (for instance, a document's cover page, or a photo), you might want to exclude that page from the OCR.

The **Make Text Searchable** box controls whether the documents will be full-text indexed. When you index a document, its text is added to the full-text search. If a document with text is not indexed, its text can be viewed in the Document Viewer, but you cannot use full-text search to find keywords in the document. Again, you will generally always want to keep this box checked, since full-text search is one of the main reasons that text is useful in a document. (If this box is grayed out, it means that an administrator has configured indexing preferences for the entire repository that cannot be modified for a particular document.)

If you click the **Options** button, you can further customize your OCR process. In this dialog, you can select the language for which you want to optimize your OCR settings. Setting the OCR language to match the language of the document will increase OCR accuracy. You can choose whether to decolumnize text, so that text that takes up two or more columns on an image (for instance, a page from a newspaper or magazine article) appears as a single column in the text document. Finally, you can choose to temporarily enhance or 'clean up' the image prior to OCRing. If you choose this option, click the Configure button to specify your image clean-up preferences.

The **Image Clean-Up Options** dialog allows you to deskew, despeckle, or rotate the image, or remove lines from it. These processes are only for the purposes of enhancing the OCR, and do not permanently affect the images. Deskew straightens crooked images. Despeckle removes tiny spots and other 'noise' from the image. Rotate reorients the image; you can choose to rotate images either automatically or by a set amount. Automatic rotation is best if images may be imported in any orientation, but it takes longer than rotating by a set amount as the page must be OCRed at each possible orientation to determine the correct orientation. If all pages will be imported with the same incorrect orientation, you should use Rotate 'by this amount.' Finally, line removal allows you to remove horizontal or vertical lines from the image that might affect the quality of the OCR.

The **More Info…** button in the **OCR/Extract Text/Index** dialog allows you to view more information about text searching, OCR and text extraction. It also allows you to view the types of electronic document that can have text extracted from them.

Once you have generated text from a document, you can view that text in the Text pane of the Document Viewer.

2.2.2.2. Editing Text

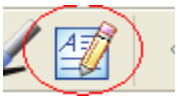


Figure 14: The Edit Text Button.

By default, the text pane is greyed out so that the text cannot be accidentally changed. However, you can turn on text editing, which will allow you to change the text directly. This can be useful for repairing errors in the OCR; for instance, if a client's name was misread by the OCR, but you nonetheless wanted it to be searchable, you could modify the text so that the name was correctly spelled. To turn text editing on or off, you can either select **Edit Text** from the **Tools** menu, or click the Edit Text button.

2.2.3. Metadata Pane

The Metadata Pane displays additional information relevant to the document. It contains four tabs: Fields, Tags, Links and Versions. For more information on the different kinds of metadata, see Section 2.2.3. Metadata.

2.2.4. Thumbnail Pane

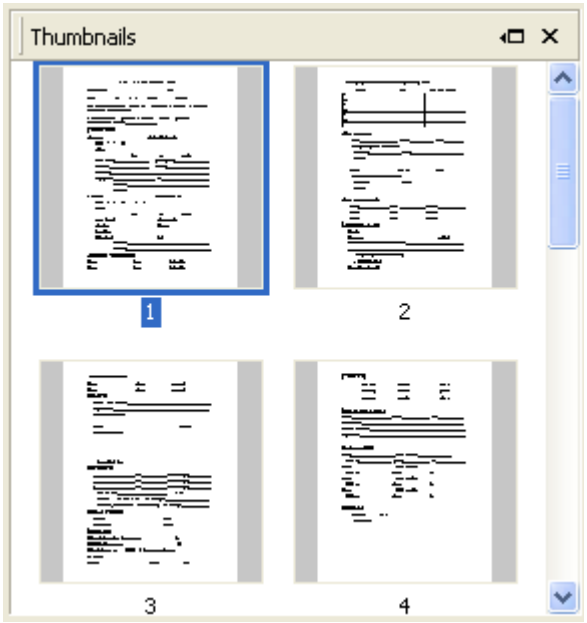


Figure 15: The Thumbnail pane.

The Thumbnail view provides a larger-scale view of your document. You can see several pages at once, and can scan through your entire document quickly. The thumbnail view is useful for quickly locating and opening pages. You can also use the thumbnail pane to modify individual pages in certain ways.

To open a page from the Thumbnail view, simply double-click the thumbnail image. You can move a page to a different location in the document by dragging and dropping, just as you would move a document in Windows: select the image and drag it to its new location. (In fact, you can drag a page to a different place in the same document or into a different document. To do the latter, just open another Document Viewer and drag the page from one thumbnail pane to the other.)

To rotate one or more pages from the document viewer

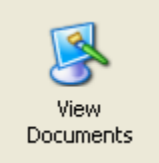
1. Select the page or pages in the thumbnail view.
2. Right-click the documents.
3. Select **Rotate image(s)…**
4. Choose the amount you wish to rotate the images.

If you want to split one document into multiple documents, you can also do this from the thumbnail view. This will remove the selected page or pages and create a new document containing those pages. Both image and text pages, and any annotations on the pages, will be moved to the new document.

1. Select the relevant page or pages.
2. Either right-click the pages and select **New Document**, or press CTRL-D.

The New Document dialog will open and allow you to configure the new document. For more information on this dialog, see Section 5.2.1. Configuring Default Behavior for New Documents

2.3. Customizing the Document Viewer



You can customize the appearance and behavior of the document viewer to match the way you want to work with documents. To open the View Document Options dialog, open the **Tools** menu and select **Options,** then click the **View Documents** icon in the Options menu. The View Document Options dialog allows you to customize the appearance of the Document Viewer in the Laserfiche Client and configure the method for opening certain special types of files.

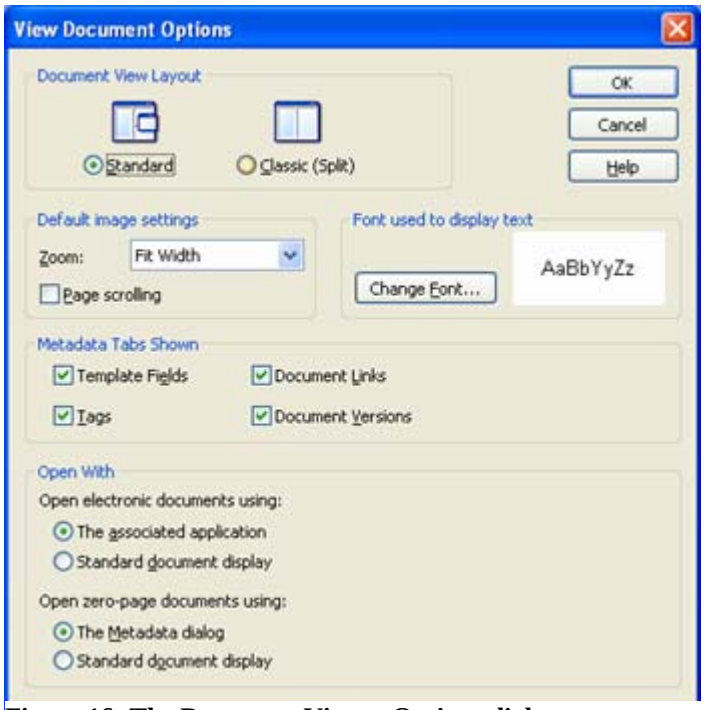


Figure 16: The Document Viewer Options dialog.

Document View Layout: There are two basic options for the layout of the document viewer: Standard, which allows you to configure up to four panes, and Classic, which allows you to configure up to two panes and which is reminiscent of the Document Viewer in Laserfiche 6. Standard allows for more flexibility and the ability to see more information at once, while Classic may be desirable for users who were very comfortable with the Laserfiche Client 6.

Default image settings: This option allows you to configure the default magnification used to display an image in the Document Viewer. Select the **Page scrolling** check box to configure the Document Viewer to automatically load the next page when you scroll past the bottom of the page. **Font used to display text:** By selecting 'Change Font,' you can customize the font display to choose the text font, size and style you prefer for the text associated with the document.

Metadata tabs shown: This options allows you to determine which metadata types – template fields, document links, tag and document versions – you wish to see in the Metadata section of the Document Viewer. For more information on metadata types, see Section 3. Metadata.

Open With: The Open With option allows you to customize the way that certain special document types are opened. You can determine whether electronic documents should be opened with their native application, or whether the template field and any associated text or Snapshot images should be opened by default instead. You can also determine whether zero-page documents should open just the Metadata dialog or the entire Document Viewer.

2.3.1. Customizing the Document Viewer Toolbar

You can customize the toolbar for the document viewer just as you can customize the toolbar for the folder browser. The process is exactly the same, except you must open the **Toolbar** options dialog from within the document viewer rather than from the main Client application. For more information, see Section 1.4.2. Customizing the Toolbar.

2.4. Annotations

Annotations are a way to add additional information to a page of your document. Annotations allow you to work with a Laserfiche document as you would a paper document – for instance, adding sticky notes or highlighting sections of the document – without actually modifying the image. The annotations are applied over the image pages, without changing the underlying page. There are four types of annotations in Laserfiche: stamps, sticky notes, highlights and redactions.

Note: Since annotations are applied over the image pages, annotations cannot be applied to electronic document files.

2.4.1. Stamps

A stamp is a small image placed on a page of your document. For instance, you might mark approved documents with a stamp that says "Approved," or stamp "Confidential" on confidential documents. Laserfiche comes with four default stamps: Faxed, Received, Approved and Confidential. You can also create custom stamps tailored to your needs.

There are three types of stamps. Public stamps are available to any user in the organization. Personal stamps are available only to the user who created them. Single use stamps remain in the list of stamps only until you use a different stamp; then they are removed.

A stamp can be made from almost any monochrome bitmap image. If the image you want to use is in another file format, or is a color bitmap, you will need to convert it to a monochrome bitmap. For many document formats, you can do this by opening the image in Microsoft Paint, selecting **Save As**, and then choosing Monochrome Bitmap from the file type list.

Once you have saved the image you want to use as a monochrome bitmap, you can use that image as a stamp. Once you have applied a stamp, you can rotate the stamp or change its color by right-clicking the stamp and selecting **Rotate** or **Change color**.

To add a stamp

1. In the Laserfiche Client, open the document to which you want to apply the new stamp. If you do not want to apply the stamp to any document at this point, open any document.

2. From the **Tools** menu, select **Add Annotation** and then **Stamp**, or click the **Stamp** button on the toolbar. This will open the **Stamp Manager** dialog.

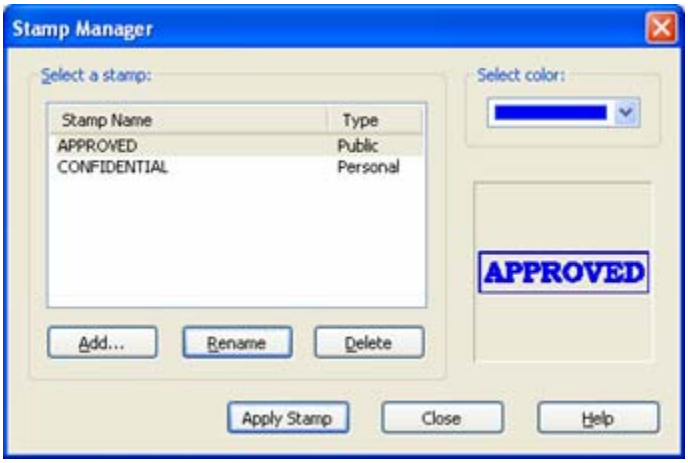


Figure 17: The Stamp Manager.

3. Click the **Add** button.

4. Navigate to the monochrome bitmap which you want to add as a stamp.

5. In the **Add to list** option, select **Public** if you want the stamp to be available to all users, **Private** if you want to only use the stamp yourself, or **Neither** if you wish to create it as a single-use stamp.

6. Click **Open**.

To apply a stamp to a document

1. In the Laserfiche Client, open the document to which you want to apply a stamp.

2. Navigate to the page to which you wish to apply the stamp.

3. From the **Tools** menu, select **Add Annotation** and then **Stamp,** or click the **Stamp** button on the toolbar. This will open the **Stamp Manager** dialog.

4. In the **Select a stamp** option, select the stamp you wish to apply.

5. If you wish to apply the stamp in a color other than black, select the color from the **Select color** list.

6. Click the **Apply Stamp** button.

7. Click on the part of the image to which you want to apply the stamp.

To remove a stamp

1. In the Laserfiche Client, open the document from which you want to remove a stamp.

2. Navigate to the page from which you wish to remove the stamp.

3. Right-click the stamp and select **Delete**.

2.4.2. Sticky Notes

Sticky notes are small text notes you can apply to pages of a document, just as you would attach a physical note to a paper document. Unlike physical notes, however, the text in Laserfiche sticky notes can be searched. Sticky notes are placed on a specific part of the page. For instance, if you want to comment on a particular paragraph, you can place the sticky note next to that paragraph.

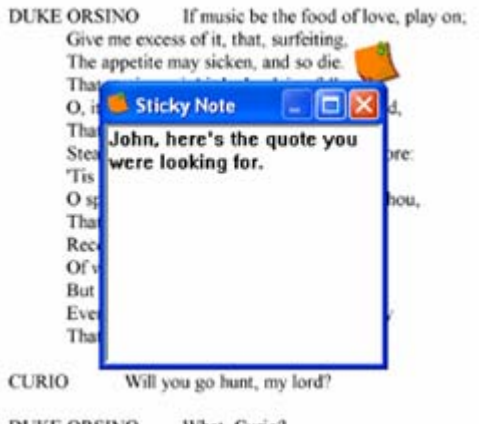


Figure 18: An open sticky note. When closed, only the sticky note icon is visible on the page.

If you type the URL to a websites (for instance, beginning with http://, ftp:// or www), the URL will automatically be changed into a clickable hyperlink. This allows you to click directly on the link and have the web page or file open. You can also customize the color of a sticky note by right-clicking the note and selecting **Change color**.

Sticky notes are useful for adding additional information to a document. For instance, you might create a sticky note to a comment to a picture identifying the person depicted, or you might add a note to supplement an account number with the company name and contact information for that account. Since sticky notes are searchable, you can use them to flag documents or portions of documents for another user. If you saw a document that you wanted to bring to the attention of your co-worker, Jack, you could add a sticky note saying something like "Jack, this might interest you." Jack could then perform a sticky note search of his name and return all the documents that his co-workers had flagged as potentially interesting for him. For more information on sticky note searches, see Section 8. Searching.

To apply a sticky note

1. In the Laserfiche Client, open the document to which you want to add a sticky note.

2. Navigate to the appropriate page.

3. From the **Tools** menu, select **Add Annotation** and then **Sticky Note**, or click the **Sticky Note** button on the toolbar.

4. Click on the image to place the sticky note. The **Sticky Note** dialog will open.

5. Type your note in the box.

6. Click the red X in the upper right-hand corner of the sticky note to close it and save the text.

To remove a sticky note

1. In the Laserfiche Client, open the document from which you want to remove a sticky note.

2. Navigate to the page from which you wish to remove the sticky note.

3. Right-click the sticky note and select **Delete**.

2.4.3. Highlights

You can emphasize or set off certain sections of a document you are working with by applying a highlight to the image. A highlight is a colored overlay of the image; it does not obscure the image. You can customize the color of a highlight by right-clicking the highlight and selecting **Change color**.

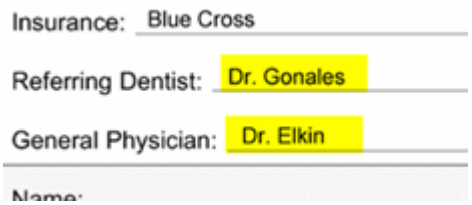


Figure 19: An image with highlighting applied.

To highlight your image or text

1. In the Laserfiche Client, open the document to which you want to add a highlight.

2. Navigate to the appropriate page.

3. From the **Tools** menu, select **Add Annotation** and then **Highlight**, or click the **Highlight** button on the toolbar.

4. Click and drag on the image to draw a box around the section of the image you want to highlight, or select the text in the text pane that you want to highlight. (See Section 2.4.5. Linking Text and Image Annotations for information on highlighting both image and text.)

To remove a highlight

1. In the Laserfiche Client, open the document from which you want to remove a highlight.

2. Navigate to the appropriate page.

3. Select the highlight by clicking on it.

4. Either right-click the highlight and select **Delete**, or press the DELETE key.

2.4.4. Redactions

You can redact a portion of an image or text. Once an image is redacted, only users with the **See Through Redactions** right for that document can see the text. Other users will see an opaque black box. Redactions provide page-by-page, paragraph-by-paragraph or even line-by-line security for a document. For instance, you might choose to redact a client's social security number to protect that client's identity, and configure your security settings such that only users with a legitimate need for that information can see through the redactions.

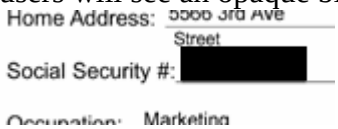


Figure 20: A redacted image viewed by a user with the See Through Redactions right.

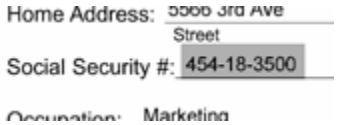


Figure 21: A redacted image viewed by a user without the See Through Redactions right.

To redact your image or text

1. In the Laserfiche Client, open the document to which you want to add a redaction.

2. Navigate to the appropriate page.

3. From the **Tools** menu, select **Add Annotation** and then **Redaction**, or click the **Redaction** button on the toolbar.

4. Click and drag on the image to draw a box around the section of the image you want to redact, or select the text in the text pane that you want to redact. (See 2.4.5. Linking Text and Image Annotations.)

To remove a redaction

1. In the Laserfiche Client, open the document from which you want to remove a highlight.

2. Navigate to the appropriate page.

3. Select the redaction by clicking on it.

4. Either right-click the redaction and select **Delete**, or press the DELETE key.

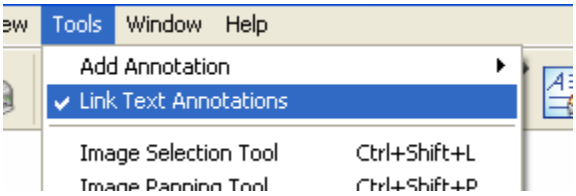
2.4.5. Linking Text and Image Annotations

In many cases, when you are highlighting or redacting text in a Laserfiche document, you will want to apply the annotation both on the image and in the text part of the document. This ensures that the annotation is visible however one views the document; in the case of redaction, it ensures that the information is redacted everywhere it might be seen by people who don't have the rights to see it.

Redacting the text part of the document is also the only way to ensure that the redacted segment will not be searchable in Laserfiche, and that it will not be searchable if the document is exported as a PDF. You might also want sections of text that are highlighted on the image to be highlighted in the text portion, and vice versa.

By default, if you apply a redaction or highlight to the text portion of the document, Laserfiche automatically applies the annotation to the image as well. This is called a linked annotation, and it allows you to redact both text and images in one step. Note that linked annotations only work if you apply the annotation to the text of the document. Applying the annotation to the image will redact or highlight only the image, not the text.

If you do not want text annotations to be linked to the image, you can turn off this option. In the Document Viewer, open the **Tools** menu and select **Link text annotations** to clear the selection. To turn annotation linking back on, simply select it again.



2.5. Electronic Documents

Any document which contains a file other than a TIFF image or a text page is an electronic document. For instance, if you imported a Word document or an Excel spreadsheet into Laserfiche, it would be an electronic document. Electronic documents can be opened in their native applications directly from the Laserfiche repository. For instance, you could open a Word document from Laserfiche, and Microsoft Word would launch and open the document.

Electronic documents are represented by their native file format icons – for instance, an Adobe PDF file in Laserfiche will use the same icon that it would in Windows Explorer. This allows you to quickly determine at a glance what type of file you are opening.

2.5.1. Opening Electronic Documents

If you want to view the electronic document – for instance, if you have imported a spreadsheet to Laserfiche and you would like to view it or change it in Excel – you will want to open the Electronic File portion of the document. This is the default method of opening an electronic document. If you double-click on the document in the repository, it will launch in its native application. (You can also right-click the document, choose Open and then choose Electronic file.)

You can also open the document in the document viewer. This will *not* open the electronic file itself. Instead, it will allow you to view the document's metadata (any template fields, links, tags or versions associated with the electronic document), as well as any extracted text. If you have printed images of the electronic file using Snapshot, those images will be included as well. You can view the document in this manner by right-clicking it and choosing Open and then Pages.

Figure 22: The Open command for an electronic document. You can choose to open the electronic file itself, or to open the pages and view the metadata and any images or extracted text.

If you simply want to make the document's metadata visible, you can configure the folder browser view to display that information. For more information, see 1.4. Customizing the Folder Browser

You can change the default means of opening an electronic document so that the pages will open automatically rather than the electronic file.

To change the default view for electronic documents

1. In the Laserfiche Client, open the Tools menu.

2. Select Options.

3. Select View Document.

4. Under "Open electronic documents using" choose "The associated application" if you want electronic documents to launch in their native applications by default, or "Standard document display" if you want to view pages by default.

5. Click Ok.

2.5.2. Modifying Electronic Documents

You can modify an electronic document simply by opening the electronic file and making the changes you want. While you have that electronic document open, no other users will be able to modify it, although they will be able to modify its metadata or open it for viewing. When you save and close the document, you will be prompted to save the document to the Laserfiche repository. You will be able to save the document as a new version, save it as a new document, overwrite the existing document, or discard the changes you made. (For more information on saving the document as a new version, see Section 3.4. Versions.)

Figure 23: The Save dialog for electronic documents.

The changes you made will only be saved to the repository if you save and close the document before you log out of Laserfiche. If you want to be able to edit the document over a longer period of time, see Section 2.5.3 Electronic Document Check In and Check Out.

2.5.3. Electronic Document Check In and Check Out

If you are opening an electronic document in order to modify the file – for instance, if you want to make edits to a Word document stored in Laserfiche – you can check out that document. Checking out an electronic document ensures that no other users attempt to modify that document while you have it checked out, even if you log out of the repository. Checking out the document also saves a copy locally to your computer so that you can continue to modify it even when you do not have the Client open.

When one user has a document checked out, other users will be able to view the document, but not make any changes to it. The copy of the document on the Server won't be modified until you choose to check the document back in, allowing you to discard changes if you decide you do not want to apply them.

To check out an electronic document

1. Right-click the document and select **Check In/Check Out** and then **Check Out Document(s)**, or open the **Action** menu and select **Check Out Document**. This will open the **Check Out Document(s)** dialog.

2. The document will, by default, be stored locally in a "My Laserfiche Documents" folder in the "My Documents" folder. You can choose another location, if you wish.

3. Optionally, add a comment describing why you are checking out the document.

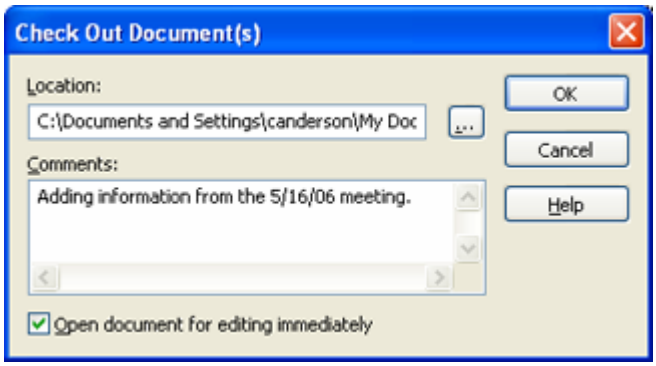


Figure 24: The Check Out Document(s) dialog.

4. If you wish to immediately open the document, check "Open document for editing immediately." Otherwise, clear this box.

5. Click **OK** to check out the document.

When you have a document checked out, a pencil will appear on the icon for that document. If another user has a document checked out, a red check will appear on the icon for that document. To see who has a document checked out, and to read their Check Out comments, right-click the document, select Properties, and click the Check Out Details button.

> **Note:** Do not move or rename the file stored on your computer. If you move or rename the file, then Laserfiche will not be able to find it. If Laserfiche cannot find the file, then you cannot check in your changes.

When a document is checked out, it cannot be modified by other users. This extends to the document's metadata: other users will be unable to modify the document's template fields, add or remove tags from the document, change the version group of the document, or add other documents to the document's version group. (Other users can still create document links to or from the document, or delete other versions of the document.) If the user who has checked out the document edits its fields or tags, however, the modifications to the metadata are cached locally and applied to the Laserfiche repository

only when the document is checked back in. Changes to the links and version group are applied immediately, since they also affect other documents in the repository.

When you are finished with a document, you can choose to undo the check out or to check the document in. Both of these options are available by right-clicking the document and selecting Check In/Check Out. Undoing the check out discards the changes you made, leaving the document in the repository unaltered; it also unlocks the document so that other users can check it out or modify it. Checking the document in will apply the changes to the server.

To check in a document

1. In the Laserfiche Client, right-click the document and select **Check In/Check Out** and then **Check In Document(s)**.

2. Choose whether you want to save the document as a new version of the document, to save as a new document, or to overwrite the existing document.

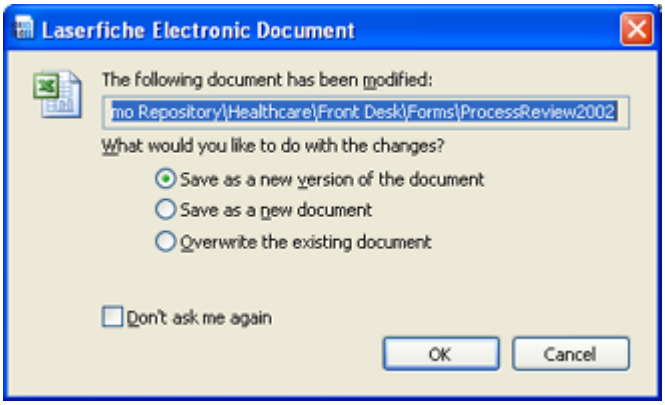


Figure 25: The Check In dialog for documents that have been modified.

3. Click **OK**.

4. If you choose to save as a new version, you can set new version comments. A new document will be created and added as the most recent version of the original document's version group. (See Section 3.4. Versions for more information.)

5. If you choose to save as a new document, the New Document dialog will open. (See Section 1.3.1.1 New Document Options for more information.)

To undo a check out

1. In the Laserfiche Client, select the electronic document whose check out you wish to undo.

2. In the **Action** menu, select **Undo Check Out**.

Note: Administrators can also 'break' the lock on checked out documents. For instance, if a user checked out a document and then went on vacation, and other users needed to be able to modify the document in the interim, an administrator could break the check out and allow other users to check out the document.

3. Document Metadata

Laserfiche documents can contain additional information, besides that contained in the actual images, text and electronic files. This information is called metadata. For instance, in addition to storing a document itself, you might also want to keep track of when that document was added to your repository, to what user it is currently assigned, or whether it is a later version of an existing document. There are four types of document metadata: templates, tags, document links, and versions.

You can view a document's metadata by opening the metadata dialog directly, or by viewing the document in the Document Viewer. To open the metadata dialog directly, select a document and open the **Action** menu. Select the metadata type you want to view: **View Fields**, **View Tags**, **View Document Links** or **View Versions**. You can also open the dialog by right-clicking the document and choosing **View Fields**. Any of these commands will open the Metadata dialog.

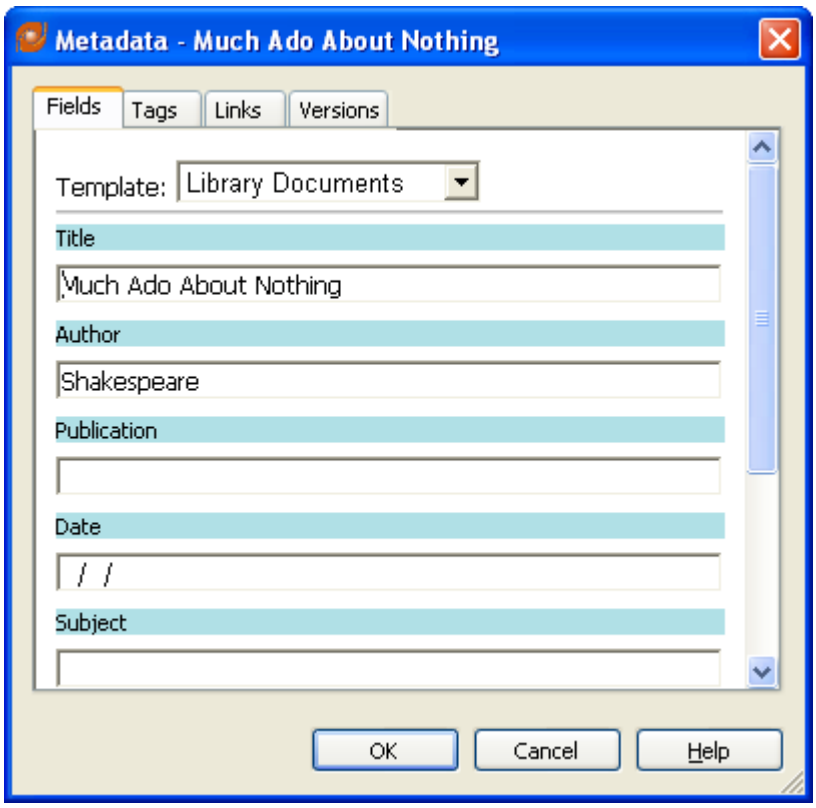


Figure 26: The Metadata dialog, with the Fields tab open.

The Metadata dialog has four tabs – one for each metadata type – and the tab for the metadata type you selected will automatically be opened. The Document Viewer's Metadata pane uses the same layout of four metadata tabs.

3.1. Templates

Template design is essential to a well-thought-out file plan. Because template data can be used to file documents and create folder structures, it is important to design templates with more than just document retrieval in mind.

3.1.1. What are Templates?

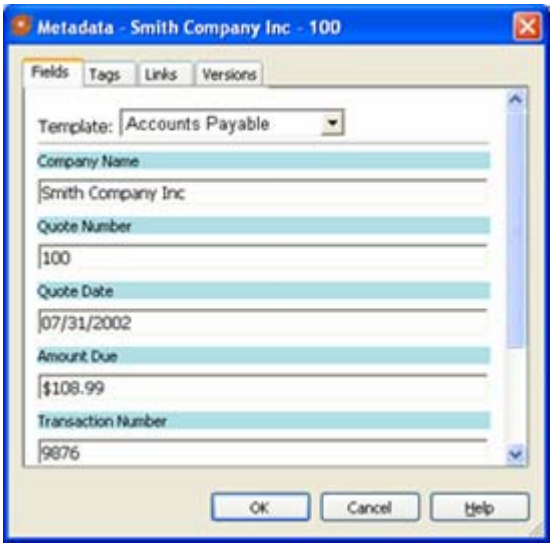


Figure 27: The Template Fields tab of the Metadata dialog.

Templates allow Laserfiche users to attach a variety of metadata to documents. A template consists of a collection of template fields, each of which holds a specific item of information relating to a document—customer names, filing dates, telephone numbers, unique ID codes, or anything else you choose to attach. Template information can include words, numbers, dates and times. Template information makes documents easier to find.

3.1.2. Designing Templates

In designing your templates, you will need to select properties for each field of the template. Depending on how you plan to use the templates, different template field properties can make a significant difference in data accuracy, speed of entry, and database size. The following sections will help you choose the appropriate field properties for your goals.

3.1.2.1. Template Field Data Types

The properties of a template field determine what information a user can enter in that field. The most important property of a template field is the type of data that it will contain. The following data types are available for Laserfiche template fields:

- **Character (Char).** This type may contain a string of any type of characters. This is the most flexible type of field. Use this type when you are not sure if the constraints of the other types of fields will be appropriate. You can define your own constraints on char fields; see the next section for more information.
- **Integer.** This type may contain a whole number between zero and 64,999.
- **Long integer.** This type may contain a whole number between zero and 3,999,999,999.
- **Date.** This type may contain a date. Date fields will use the date format configured on your workstation, and will only accept valid dates (for instance, they will not accept a date of February 29 for a non-leap year.)

- **Date/Time.** Date/Time fields contain a date and time, which will be configured according to the settings on your workstation as with Date fields.
- **List fields.** List fields allow you to create a list of values for users to choose from. List fields should be used whenever there are limited choices for field values. Using drop-down lists makes working with the template more efficient and ensures that the field values will always be consistent. For example, a "department" field could list the departments in your organization. This allows your users to simply select a value rather than typing it in, and prevents differing values like Sales, Sales Dept., Sales Department, etc. that could make it difficult to search on that field.

3.1.2.2. Other Template Field Properties

In addition to the data types listed in the previous section, you may place several additional constraints on your template fields, as well as determining whether the fields are indexed for faster searching and whether they will contain a default value.

- **Name.** To avoid confusion, your template field name should be as descriptive as possible. Note that if several templates share a field with the same name, you can display information from all of these templates in the same column in the folder browser.
- **Required.** If the Required box is checked, a user will not be able to assign field data to a document or folder unless they fill in the required field. Be careful with required fields; using too many of them can significantly slow scanner operators, since any field that cannot be filled in will prevent the document from being filed and halt the scanning process until the information for that field can be located. (You can use default values to avoid this problem; if there is a default value for a field, that field will always be created with a starting value.)
- **Indexed.** Checking the Index option will tell your DBMS to index the values in this field. Fields do not need to be indexed in order to be searchable – all template fields are automatically searchable. Indexing makes searches on that field faster and more efficient. However, indexing is only useful if the values stored in this field are relatively unique (such as names or telephone numbers). It provides little advantage for fields with only a few possible values (such as a Yes/No list field). Indexing fields will increase your database size somewhat. Indexing all the fields in a template will negatively affect performance. Indexing should be used, therefore, in situations where one or two fields are searched much more often than the other fields, and those fields have relatively unique values. Note that indexing template fields is unrelated to indexing documents.
- **Width.** This property applies only to character (char) fields. It determines the maximum number of characters that may be entered in the field.
- **Default value.** Laserfiche provides the ability to set default values for any field on a template and recognizes "tokens" for special values that can be used to automatically fill in the field. Default values can be especially useful for fields

that will always have the same value when they are first filed. For instance, applications and requests might be first filed with status "pending", which would be later changed to "approved" or "rejected." Setting "pending" as the default value for the Status field would save time for scanner operators.

Similarly, information such as “scan date” or “document ID” can be automatically assigned to the documents using default values and Laserfiche “tokens.” To automatically apply the current date to a “scan date” field, you can use the $date$ token as a default value. See Section 10. Appendix: Tokens for more information.

- **Constraints.** This property applies only to character (char) fields. If you wish to ensure that data is entered only in a specific format, you can set a constraint using regular expressions. For instance, to make sure that phone numbers are entered in the format 123-456-7890, you would create a field constraint with the value \d\d\d-\d\d\d-\d\d\d\d. These constraints are particularly useful for ensuring that data is entered correctly and completely, to ensure that it is easy to search for later on.

3.1.2.3. Template Design Tips Summary

The following is a quick summary of some of the tips given in this section. Note that many of the methods for increasing data accuracy will slow data entry.

To improve data accuracy, completeness, and searchability:
- use list fields wherever possible
- use required fields
- use constraints

To increase speed of data entry:
- create templates containing only necessary fields
- don't use required fields and constraints unless necessary
- use list fields
- use default values and tokens

To increase search speed, index one or two fields that are frequently searched.

It is particularly helpful to combine these techniques. For instance, if you frequently search by account number, you might want to make the account number field required, and set a constraint to ensure that the number will always be a valid account number. This increases the likelihood that the numbers will be correctly input, which in turn increases the likelihood that you will be able to locate the document using that number.

3.1.3. Creating templates

Any user with the "Manage Metadata" privilege can create templates in the Laserfiche Administration Console. Once a template has been created, users with this privilege may edit, reorganize or add to it using the same interface. Be aware that editing a template may affect existing metadata.

To create a template

1. Open the Laserfiche Administration Console. Expand your repository item, expand the **Metadata Management** item, and select Templates. Select **New Template** from the **Action** menu or the context menu that appears when you right-click on Templates item.

2. Choose a name for your template.

3. Click the **Insert** button to create a new field.

4. Under **Field Name**, type a name for the field.

5. Under **Type**, select a field type. See Section 3.1.2.1. Template Field Data Types for descriptions of the types.

6. Under **Width**, type a maximum length in characters for the field.

7. Under **Default Value,** type an optional default value. You can use tokens for this value. For a list of tokens, see Section 10. Appendix: Tokens.

8. If you wish the field to be indexed, select the **Indexed** box.

9. If you wish the field to be a required field, select the **Required** box.

10. If you wish to use a field constraint, click the **Constraint** button to select or create a constraint. Constraints use regular expressions – for instance, you could use the regular expression \d\d\d-\d\d\d-\d\d\d\d to ensure that phone numbers are input in the format XXX-XXX-XXXX, and contain only numbers and dashes. You can also configure a constraint violation message, which will be displayed to users if they type an entry that does not meet the constraints. For more information on using regular expressions, see the "Regular Expression Reference" in the "Metadata Administration" section of the Laserfiche Administration Guide.

11. If the field is a list field, select the **Edit List** button to input the items that should be available in the list. In the **Edit List** dialog, you can add or remove list entries, choose to sort them in ascending or descending order or leave them unsorted, or add a blank value to the list.

12. Repeat steps 4-11 for each template field you wish to add to this template.

13. When you have finished adding fields, you can re-order the fields by selecting a field and clicking the **Up** or **Down** button. Templates in the Laserfiche Client will be displayed in the order configured here.

14. When you have finished, click **OK** to save changes to the template.

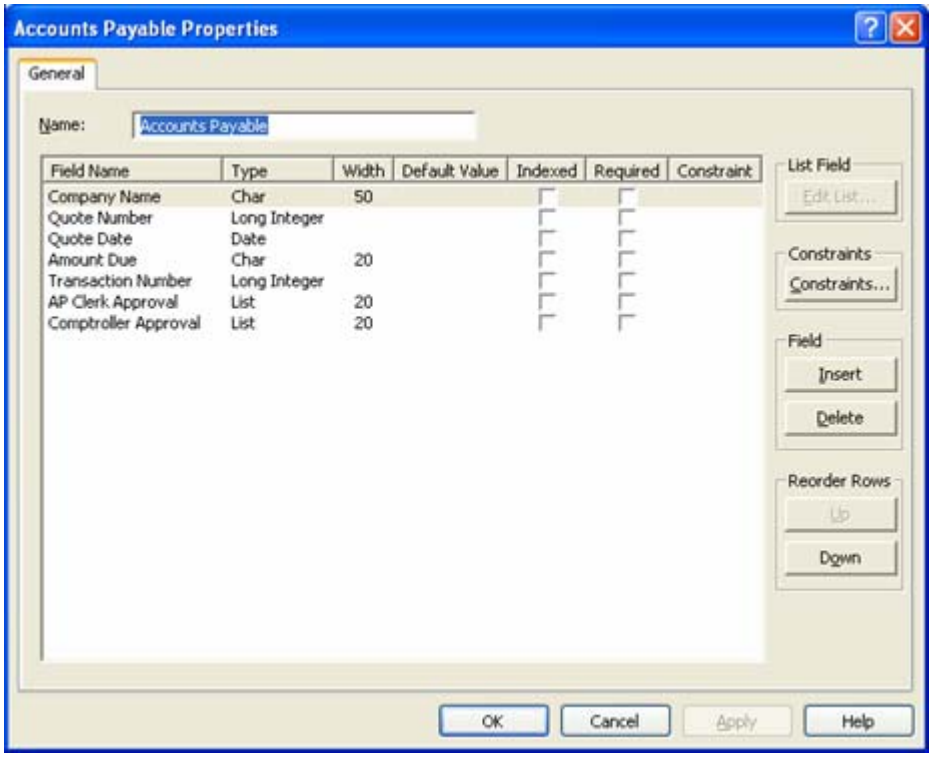


Figure 28: The Template Creation dialog.

Existing templates can be updated, reorganized or modified at a later time. If a modification will affect existing data, the system will warn the user and ask if they are sure they want to make the modification.

3.1.4. Filling Template Fields

1. Open the **Fields** tab of the **Metadata** dialog for the document whose fields you wish to fill.

2. Type a value in each template field you wish to fill, or select a value for list fields.

   Tip: If you want to fill a Date or Date/Time field with the current date and time, press the spacebar.

3. If you are viewing the metadata dialog on its own, click **OK** to save the values. If you are viewing it in the Document Viewer, save the document to save the values.

Required fields are marked in red. You cannot save your changes if any of these fields are blank. You will be unable to type a value that is not valid for the field type – for instance, if a field is of type 'integer,' and you try to type a string of non-numeric characters, the characters you are typing will not appear in the field.

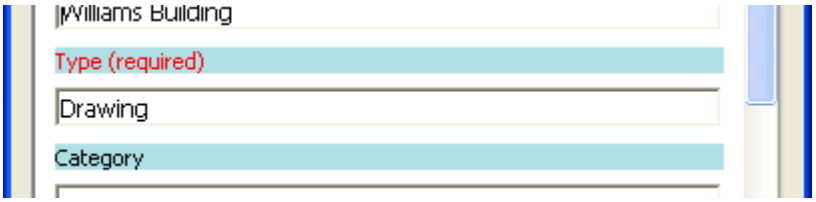


Figure 29: A required template field.

If you are filling a template field in the Document Viewer, you can open the text pane and drag text directly from that pane into the relevant template field. As long as the text pane is not in Edit mode, the text will only be copied, not moved. This is useful for quickly filling template fields with information from the document – for instance, an author's name or title.

3.2. Tags

Tags are an optional method for categorizing documents that can be added to or removed from a document at any point. There are two types of tags: informational tags, and security tags. Informational tags provide a purely informational categorization, while security tags can be used to restrict access to documents.

3.2.1. Informational Tags

You can mark and categorize documents using informational tags. Informational tags simply flag a particular document; you can then either view the tags on a document or search for documents with that particular tag. For instance, you might want to mark certain documents as having particularly high priority. You could create an informational tag called "Priority" to mark documents that are of high importance, and then search on the Priority tag to locate and keep track of those documents.

3.2.2. Security Tags

Security tags are different than informational tags because they can be used to restrict access to documents. Users can only open documents with security tags if the user has been assigned the security tag as well. For instance, if the document "Report" has been assigned a security tag called TagA, the user JSmith will only be able to open that document if he or she has TagA as well.

Security tags can be used to add another level of security – independent of folder structure – to documents. For instance, your company's workflow process might route documents through several folders with different security settings. For highly confidential documents, you might want to restrict access beyond that provided by your normal folder security. You could use a security tag to implement this, since it wouldn't be dependent on the document's location in the folder tree.

3.2.3. Viewing Tags

You can view the Tags tab by opening the Metadata dialog; see Section 3. Document Metadata.

The Tag tab will display all the tags that can be applied to the document. If the tag is currently applied, the box will be checked; if the box is not checked, the tag is not currently applied. The tab will also display the description of the tag and any comments that might have been set.

3.2.4. Creating and Applying Tags

Tags are created in the Administration Console and applied to documents or folders in the Laserfiche Client. Administrators can also apply security tags to users in the Administration Console; those users will then be able to open documents with that security tag. It is a good idea to consider carefully what tags your repository needs, to ensure that you have the tags you need and to avoid extraneous tags. Creating a tag will make it available for the entire repository.

To create a tag for the repository

1. Open the Laserfiche Administration Console.
2. Select **Metadata Management**.
3. Select **Tags**.
4. Right-click and select **New tag**.
5. Type the name of the tag in the **Name** field. Optionally, type a description in the **Description** field.
6. If the tag will be a security tag, check **Security tag**.

To apply a tag to a document or folder

1. Open the **Tags** tab of the **Metadata** dialog.
2. Check the box for the tag or tags you wish to apply.

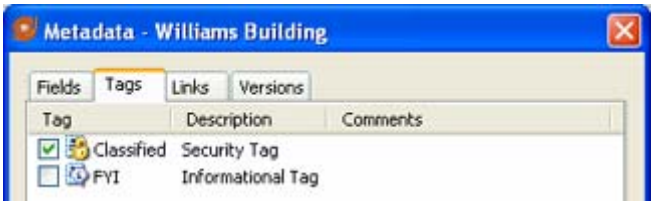


Figure 30: The Tags tab of the Metadata dialog.

3. Optionally, select the **Comments** column and type a comment.

4. Click **OK**.

3.3. Links

Document Links are ways of connecting two documents, regardless of where they might be in the repository. If you have linked two documents, they will remain associated with one another regardless of where you move them in the repository, even if you rename them or otherwise modify them.

For instance, you might use document links to associate an imported e-mail message with its attachment. Thus, even if you moved the e-mail message and attachment to different parts of the repository, you could quickly find and open the attachment when viewing the e-mail and vice versa.

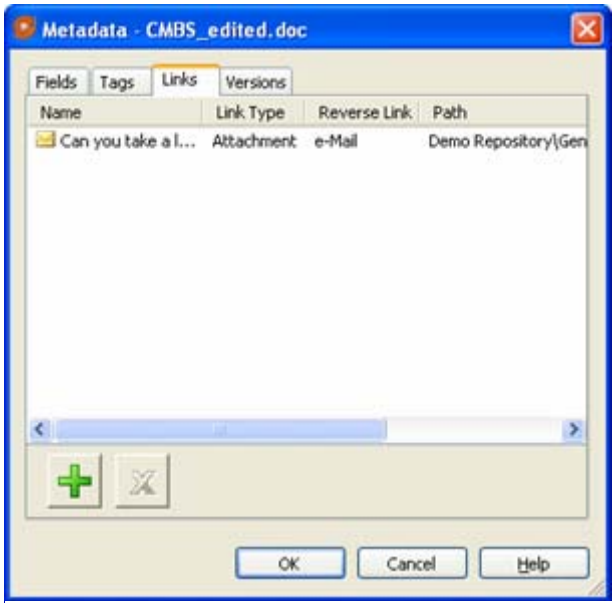


Figure 31: The Links tab of the Metadata dialog.

3.3.1. Viewing Document Links

You can view the Document Links tab by opening the Metadata dialog; see Document Metadata, above.

The Links tab will display the document or documents which are linked to your current document. You can view the name of the linked document, the type of link, and the document's location. You can also open the document directly by double-clicking on its name.

3.3.2. Linking and Unlinking Documents

You can link documents together directly from the Links tab. You will use a document relationship to connect documents, and the link type you will use must be created before you link the documents. Laserfiche 7.2 provides you with one default link type – "Supersedes" and "Superseded by" – but you can add more in the Laserfiche Administration Console. It is a good idea to consider carefully what document relationships your repository needs, to ensure that you have the tags you need and to avoid extraneous document relationships. Creating a document relationship will make it available for the entire repository.

To add a new document relationship

1. Open the Laserfiche Administration Console.
2. Expand Metadata Management.
3. Select Document Relationships.
4. Right-click Document Relationships and choose New Document Relationship.
5. Input the terms for the relationship. For instance, to link e-mails and attachments, you might use "E-mail" and "Attachment." To link an application and supporting documents, you might use "Application" and "Supporting Document."
6. Click Ok.

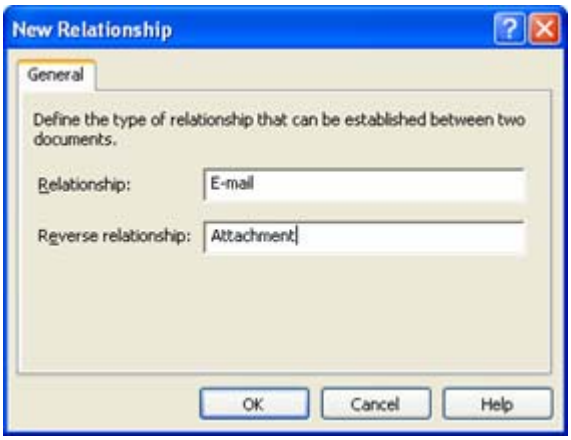


Figure 32: The New Relationship dialog.

Once the document link type has been created, you can link documents using that link type.

To link two documents using a document relationship

1. Open the Document Links tab of the Metadata dialog.
2. Click the "Create a document relationship" button, which has a green plus sign on it. This will open a "Create a Document Link" dialog.
3. Browse your repository and choose the document you wish to link.
4. In the "Choose a link…" box, select the link type you would like to use.
5. Click Ok.

You can also remove document links from this same tab.

To remove a document link

1. Open the Document Links tab of the Metadata dialog.

2. Select the document which you would like to unlink from the current document.

3. Click the "Remove the selected relationship(s)" button, which has a red X on it.

3.4. Versions

The ability to create new versions of a document was introduced in Laserfiche 7 and has been considerably expanded in Laserfiche 7.2. Versions allow you to save modifications to a document as a different, but related, document.

3.4.1. Why Use Versions?

Different organizations use versions in different ways, depending on the way they manage and use documents. Here are some examples of how and why document versioning could be used:

- **Tracking changes.** If you save modified documents as new versions of the original document, the older documents remain. You can then compare older versions to newer ones to track changes. Version tracking is enhanced by the ability to track the version creator and set comments on versions.

- **Preventing information loss.** When you create a new version of a document, you are not replacing any other versions of the document; instead, you are adding an additional version of the document to the version group. Thus, the original document remains untouched. If you want to review the previous version of the document, or return to the older version, you can still do so.

- **Maintaining different versions for different purposes.** You may wish to keep different versions of a particular document for use in different circumstances. For instance, you might want to format a particular report differently to meet the requirements of different recipients. You could use a version group to create and keep track of different versions of the report.

3.4.2. Versions and Version Groups

A *version group* is created when a new version of a document is created, either by importing or saving a document as a new version of an existing document, or by linking one existing document to another. Both the original document and the newly created or linked document are considered *versions* of the same document within that version group. By default, documents do not belong to any version group; they are not added to a version group until they have either been linked into a version group, or have had another version created or linked from them.

Laserfiche 7.2 allows you to track information about various versions. In addition to the version's creation date, Laserfiche 7.2 keeps track of the user who created the version. You can also add comments to versions; see "Version Comments," below.

Each version is designated by a number; the latest version of the document is the document with the highest number. (For documents that do not have a version group the version will be "None.") When a new version is added to a document, it is added as the newest version of the entire version group. In other words, Laserfiche version groups do not keep track of which specific document in the group the new document has been created from. Regardless of the document you are working with when you save or link a new version, the new version will become the latest version for every document within the group.

> **Example**: The document "Expense Report 2/24/06" does not have a version group: it is not a version of another document, nor are any other documents versions of it. If you open the document's **Versions** tab, you will see that the **Version** column has a value of "None." You open "Expense Report 2/24/06" and make some changes, then save it as a new version called "Expense Report 2/26/06." A version group will be automatically created; "Expense Report 2/24/06" will now have a value of "1" in the **Version** column, and "Expense Report 2/26/06" will have a value of "2." A few days later, you realize that another document – "John's Expense Report" – should also be in the same version group. From the **Versions** tab of either of the other documents, you can click the **Select an existing document to designate as the latest version** button and designate "John's Expense Report," which becomes version 3. Now, if you open the **Versions** tab of any of these three documents, you will see all three documents. Thus, all three documents are part of the same version group, and "John's Expense Report" is the latest version of that group.

3.4.2.1. The Versions Dialog

The **Versions** dialog is available from the **Metadata** dialog. You can open this dialog by selecting the document in the Laserfiche Folder Browser and selecting **View Document Versions** from the **Action** menu, or by selecting the **Versions** tab of the **Metadata** pane in the Document Viewer.

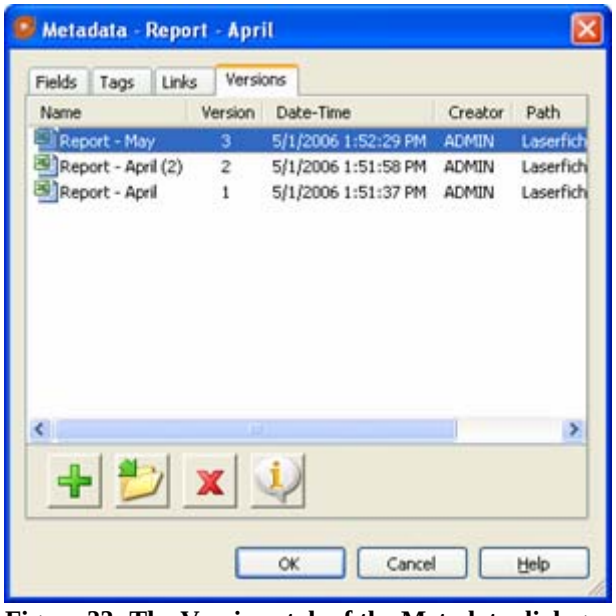


Figure 33: The Versions tab of the Metadata dialog.

The **Versions** dialog lists the files in the same version group as the currently selected document. It also lists the version number, the date and time of creation, the username of the user who created the document, and the path to the document. (If the document does not belong to a version group, only that document will be listed, and its version number

will be listed as "None.") If you have the appropriate rights, you can open any of these documents directly from the dialog by double-clicking its entry in the list.

You can also add or remove documents from the version group or view detailed version information from the **Versions** dialog. This is done using the buttons at the bottom of the dialog.

Select an existing document to designate as the latest version. This allows you to chose an existing document in Laserfiche and add it to the current document's version group as the latest version. See "Designating an Existing Document as the Latest Version," below, for more information.

Import a new document to become the latest version. This allows you to choose a document outside of Laserfiche, import it, and add it directly to the current document's version group as the latest version. See "Importing a Document as the Latest Version," below, for more information.

Remove selected document(s) as versions of this one. This allows you to remove documents from the current version group. Note that this does not delete the document. The document removed from the version group will remain in the repository with no affiliated version group. This means that, if you remove the document currently selected in the folder browser from the version group, the other documents will cease to be displayed in the **Versions** dialog; the document is no longer a member of their version group.

View or modify the comment associated with the selected version. This displays the information associated with the document you currently have selected in the **Version** dialog. The **Detailed Version Information** dialog displays the document name, its location in the repository, its version number, creation date, modification date, and the user who created it. It also displays, and allows you to modify, the comments on the version.

3.4.2.2. Version Comments

In Laserfiche 7.2, you can add comments to each version of a document. Comments can be added when the document is created, or they can be added or edited using the **View or modify the comment associated with the selected version** button in the **Version** dialog. Since opening many versions of a document and scanning for variations would be cumbersome, you might use comments on versions to record the changes made to a version. If users carefully comment when saving each new version of the document, however, locating changes is as simple as searching through the version comments or skimming the **Comments** dialogue for the versions.

3.4.2.3. Version Display

By default, the Laserfiche Client will display all versions of a document. You can also configure it to show the most recent version only. This is particularly useful if you are

working with a document that has many versions but only need to work with the latest version. Documents with no versions will always be displayed.

To display only the latest versions of documents

1. In the Laserfiche Client, open the **Tools** menu and select **Options**.
2. Under Options, select Display latest versions only.
3. Click **Ok**.

3.4.2.4. Version Searches

Laserfiche now provides a new **Version** search. Using this search option, you can search for a particular word or phrase within version comments. You can also specify that the search should only return the latest version of a document. If a document is not part of a version group it will also be returned. For instance, if you wanted to search for invoices, but only return the most recent versions of the invoices, you could perform a **Document/Folder Name** search for "Invoice," and add the **Version** search with the **Limit search to latest versions** box checked. You do not need to run a version comments search to use the **Limit search to latest versions** feature; this search constraint can be used with any other search type.

You can also use the **Created by** search to locate all versions of a document created by a particular user.

3.4.3. Creating New Versions

A document can be designated as a version in three ways: by saving a newly-modified document as a new version, by importing a file from Windows as a new version, or by designating an existing document as a version of the document. In either case, the document that you are creating or designating becomes the latest member of the original document's version group. If the original document does not have a version group, a new version group will be created for it automatically.

3.4.3.1. Saving an Electronic Document as a New Version

You will be given the option to save an electronic document as a new version in two circumstances: when you are saving changes to an electronic document you have opened directly from Laserfiche, or when you are checking in a document that you checked out and modified. Once you have saved or checked in the document, the procedure is the same.

In order to save a new version of an electronic document, it must be present in your Laserfiche repository, and you must make a modification to it. To save an electronic document that is not in your repository as a new version, see Section 3.4.3.3. Importing a Document as the Latest Version.

To save an electronic document as a new version

1. Save or check in an electronic document. The **Laserfiche Electronic Document** dialog will open.

2. Select **Save as a new version of the document**.

3. Click **Ok**. This will open the **New Document Version** dialog.

4. Under **Comments,** type any comments you wish to add to the version. Comments are optional. If the document was checked out, the check in comments will be provided as a default version comment.

5. Click **Ok**. The new version will be saved according to your new document preferences.

3.4.3.2. Designating an Existing Document as the Latest Version

You can add a document that already exists in your Laserfiche repository to the selected document's version group. The document you designate will become the latest version for that version group.

To add an existing document to the version group

1. Open the **Versions** dialog for a document in the version group to which you want to add an existing document.

2. Click the **Select an existing document to designate as the latest version** button, represented by a green plus sign.

3. Browse to the document you wish to add to the version group.

4. Click **Ok**. This will open the **New Document Version** dialog.

5. Under **Comments,** type any comments you wish to add to the version. Comments are optional.

6. Click **Ok**. This will add the document to the version group.

Note: The version group is determined by the document you have selected when you open the **Versions** dialog. If the document you select in Step 3 already belongs to another version group, it will be removed from that group and added to the currently selected one.

3.4.3.3. Importing a Document as the Latest Version

You can import a document from Windows and add it directly to a particular version group. The document you designate will become the latest version of the version group.

To import a document to a version group

1. Open the **Versions** dialog for a document in the version group to which you want to add an existing document.

2. Click the **Import a new document to become the latest version** button, represented by a folder and a green arrow.

3. Browse to the document you wish to add to the version group.

4. Click **Ok**. This will open the **New Document Version** dialog.

5. Under **Comments,** type any comments you wish to add to the version. Comments are optional.

6. Click **Ok**. The new version will be saved according to your new document preferences.

4. Searching

Searching is one of the fastest and most effective ways of locating a document. Laserfiche was designed on the principle that you should be able to take any piece of information you know about a document and use that information to quickly locate the document. To that end, you can perform a variety of different kinds of searches in Laserfiche, and combine those searches to pinpoint exactly the document you need.

4.1. Wildcards

Wildcards are a way of compensating for inconsistencies between your search term and the term in the document you wish to locate. This is useful to compensate for OCR errors or typos, or to find different forms of a word – for instance, to find documents containing the terms 'swim,' 'swam,' and 'swimming.'

- **Asterisk (*)**. The asterisk wildcard represents any number of missing characters, including zero. For instance, a search on the term 'report*' would find report, reports, reporting, reported, reporter, et cetera.

- **Question mark (?)**. The question mark wildcard represents exactly one character. For instance, if you were unsure whether a name was spelled 'Anderson' or 'Andersen,' you could search on the term 'Anders?n.' This would return the results either way.

- **Brackets ([])**. Like a question mark, a set of brackets represents a single missing character. However, brackets can be used to specify a smaller range of options. For instance, searching for 'd[io]ve' would find the words 'dive' and 'dove,' but not 'Dave.' **Note**: Oracle does not support brackets. If your repository uses Oracle for its database management system, you can use brackets for full text searches but not for any other search type.

- **Dash (-)**. The dash character is used in conjunction with brackets to specify that only characters within a particular range should be found. For instance, you might want to locate all documents that contain an account number that begins with '100347' and ends with a number rather than a letter. You could search on '100347[0-9].' This would return account number 1003475 but not 100347C.

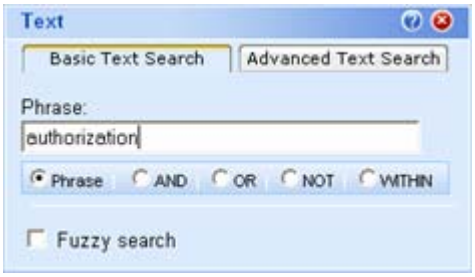
Wildcards can be used in combination. For instance, if you wanted to return all documents with reference to writing or written materials, you could search on the term 'wr[io]t*' This could locate any of the following terms: write, written, writing, wrote.

4.2. Basic Searches

4.2.1. Basic Search Types

4.2.1.1. Text

The Text search performs a full-text search of the text portions of all documents within your repository. You can use the Text search to locate documents containing specific key words. The search will return all documents which contain the specified word or words. Text search is useful if you remember a particular phrase from the document you are looking for, or if the document or documents you are searching for have distinctive keywords. If your repository is large, consider the words you are searching for carefully, or combine your text search with other searches, to keep the number of search results returned to a manageable size.



You can use wildcards in conjunction with text search. Text search is not case sensitive.

Note: Full text search only works for documents which have text: Laserfiche documents which have been OCRed, and electronic documents which have had text extracted from them.

There are some additional options for your text search.

Phrase. The default text search, phrase search, searches for multiple search terms as a phrase. For instance, if you wanted to find documents containing the phrase "market exposure," you could type those words as a phrase search. Documents would only be returned if they contained the exact phrase "market exposure." If a document contains both the word "market" and the word "exposure," but they are in different parts of the document, the document will not be returned.

AND. The AND search allows you to find all documents that contain both of two words or phrases. You could search for documents containing both the word "invoice" and the word "authorization." All documents that contained both words – no matter where the words are in the document – will be returned; documents will not be returned if they contain only one of the words, or none of the words. This is useful for narrowing the focus of your search, particularly if one of your search terms is common in documents in your repository.

OR. The OR search allows you to find all documents that contain one or both of two words or phrases. If you wanted to find all documents that contained either the word "account" or the word "client," you could use an OR search. Documents that contained either word, and documents that contained both words, would be returned.

NOT. The NOT search allows you to find all documents that contain one word or phrase but do not contain another word or phrase. This is useful for narrowing the focus of your search.

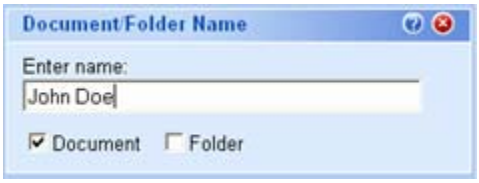
WITHIN. The WITHIN search finds all instances of two words or phrases within a certain number of words of each other. You can input a second phrase, and determine the number of characters, sentences or paragraphs by which the two search terms can be separated. (Sentences, in this context, consist of 10 words; paragraphs consist of 50 words.) This can help you find the specific document you are looking for, particularly if one of the search terms is very common and may match too many documents that are not the ones you are looking for.

Fuzzy Search. Fuzzy search can be used in conjunction with any of the above searches. Fuzzy searches locate both the exact matches to the search terms you provide and partial matches, where a certain number or percentage of letters in the result can differ from the search term. Fuzzy searches are useful to account for any errors in OCR, uncertainty about the spelling of a word or name, words or names that may be misspelled in the document, or inflected versions of words (such as “swim” and “swam”).

Under Criteria, determine whether you want the criteria for the fuzzy search to be the number of letters or the percentage of words in the search terms. If you select Number of letters, you will need to input the maximum number of letters that can differ from your search terms and still return the result. If you select Percentage of words, input the maximum percentage of letters in the search terms that can differ. For instance, you might want to locate a document which refers to a particular person. You don’t know whether the person's name is spelled "Sandra" or "Sondra," so you run a fuzzy search and specify that the number of letters can differ by one. That way, regardless of whether you input "Sandra" or "Sondra," you will be able to find the document. You will not, however, be able to find documents that refer to the person by her nickname, "Sandy." To return "Sandy," you would need to increase the number of letters that can differ to two.

Note: Fuzzy searches can take significantly longer than regular searches and may turn up less relevant search results. Thus, it is usually best to try a regular search first and use the fuzzy search only if the regular search does not return the results you need.

4.2.1.2. Document/Folder Name



The Document/Folder Name search searches for the name of an entry. You can specify whether you wish to search for documents or folders by selecting the "Document" or "Folder" boxes. You can select both to locate both documents and folders. (This search will also return shortcuts: document shortcuts are returned in document search, and folder shortcuts are returned in folder search.) Document and folder name search is useful if you know the name or part of the name of the document you are looking for.

If you know that a document is called "Application – John Doe," you can type that into the Document/Folder Name search to locate the document. By default, the search will return only exact matches. In other words, if you typed simply "John Doe," the document with the name "Application – John Doe" would not be returned. You would need to use wildcards if you wanted your search to return that result.

You can use wildcards in conjunction with Document/Folder Name search. Document/Folder Name search is not case sensitive.

4.2.1.3. Field

The Field search searches the template fields of documents in your repository. If you select a template from the list but do not type anything in the fields, the search will return all documents with that template. If you select a template and type a word or phrase in one of the field, the search will return documents if they have the selected template and have a template field value matching that which you input. If you type search terms in more than one field, the search will return documents only if their template field values match all of the values you input.

Field searches are useful for targeting documents based on specific kinds of information that you or other users in your organization have configured, such as the patient on a healthcare form or the recipient of an imported e-mail. If you have set up your templates with fields that would be useful to you, and if you have kept your template fields updated (either manually or with tokens), template searches can very quickly locate and return exactly the documents that meet those specialized criteria.

By default, the search will return only exact matches. In other words, if you typed simply "Susan" in the From search above, the document whose From field contained "Susan Ieda" would not be returned. You would need to use wildcards if you wanted your search to return that result.

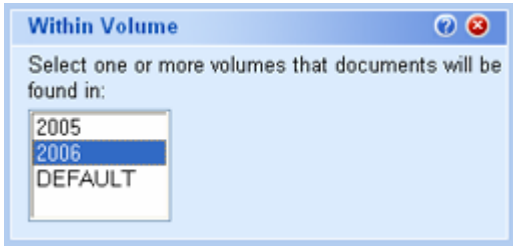
Date or Date/Time Field Searches. If the template you are searching has a date field, you can search for documents whose date field contains a value that falls in a certain date range. If you want to return only documents with a date field value of one specific day, both ends of the range should be the same date; if the field is a date/time field, you should make sure that the time range spans the entire day. If you leave one of the boxes empty, the search will be open-ended. For instance, if you type a date in the From option but not the To option, you will retrieve all documents created after the date specified in From**.** If you type a date in the To option but not the From option, you will retrieve all documents created after before the date specified in To.

You can use wildcards in conjunction with Field search. Field search is not case sensitive.

4.2.1.4. Within Folder

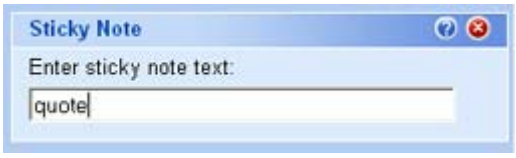
The **Within Folder** search type is unique in that it cannot be used on its own; it must be combined with another search. In effect, the **Within Folder** search is a constraint on other searches: it will return only documents that both fit the criteria of the other search and that are in the specified folder. Click the '**…**' button to browse to the folder. If you select the **Search subfolders** box, the search will also return results from the selected folder's subfolders.

4.2.1.5. Within Volume



The **Within Volume** search type returns documents that are in the specified volume or volumes. Select the volume or volumes you wish to search within from the list.

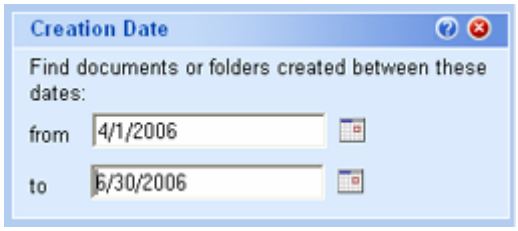
4.2.1.6. Sticky Note



This search type searches the text of all sticky notes in the repository and returns the documents whose sticky notes contain contents that match the search. If you are displaying context lines for searches (see Section 4.5. Search Options), double-clicking on the context line for the search result will take you to the page that has the sticky note and open the sticky note.

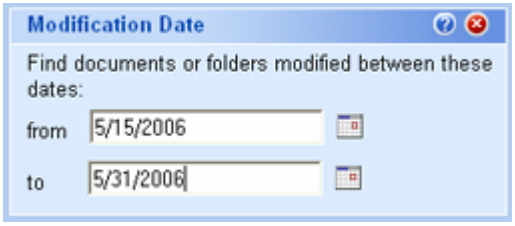
You can use wildcards in sticky note search. Sticky note search is not case sensitive.

4.2.1.7. Creation Date



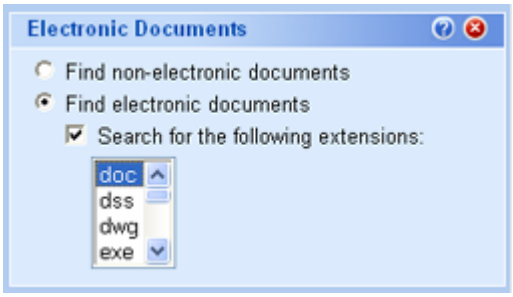
The **Creation Date** search type allows you to search for documents created during a specific period. You can type dates in the **From** and **To** options, or you can click the calendar icon to browse to a particular date. If you leave one of the boxes empty, the search will be open-ended. For instance, if you type a date in the **From** option but not the **To** option, you will retrieve all documents created after the date specified in **From.** If you type a date in the **To** option but not the **From** option, you will retrieve all documents created before the date specified in **To**.

4.2.1.8. Modification Date



The **Modification Date** search type is very much like the **Creation Date** search type, except it returns results that were modified during the specified period.

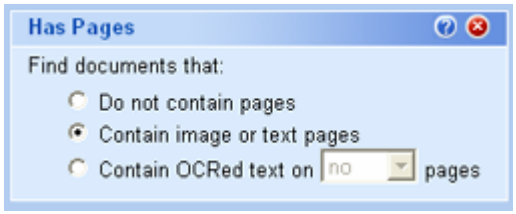
4.2.1.9. Electronic Document



The **Electronic Document** search allows you to specify whether you want to retrieve electronic documents or non-electronic Laserfiche documents. If you select "Search for the following extensions," you can specify the electronic document types you wish to be returned. (To select more than one document type, hold the CTRL key at the same time you click on the extensions.) This allows you to search for particular types of electronic documents if you want to manage certain electronic documents in a particular way.

Note: The list of extensions includes those extensions that exist or have existed in that particular repository, and so may vary from installation to installation, depending on what types of files have been present.

4.2.1.10. Has Pages

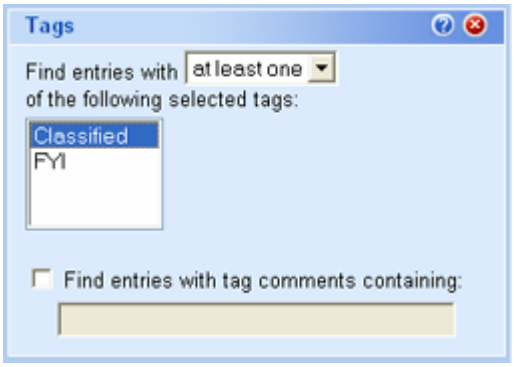


This search type allows you to specify whether you want to retrieve documents with no pages or documents with pages. If you select **Do not contain pages**, you will retrieve electronic documents that have neither had images printed with Snapshot nor have had text extracted from them; you will also retrieve any empty documents that do not contain TIFF images or text. If you select **Contain image or text pages**, you will return all documents that have TIFF image pages, all documents that have extracted or OCRed text, and all electronic documents that have had images printed with Snapshot. If you select **Contain OCRed text on**, you can specify whether to return documents with text pages. If you select **no**, only documents with no generated text will be returned. If you select **some**, documents will be returned if they have generated text for some but not all pages. If you select **all**, documents will be returned if they have text for all pages.

4.2.1.11. Relationship

The **Relationship** search type allows you to find all documents to which a particular document link relationship has been applied. For instance, you might want to locate all documents that have been marked as having superseded another record. You would choose the "Supersedes" document link from the list. You can also select multiple document link types – for instance, if you wanted to find all documents that were attachments to e-mail messages and that had been superseded, you could select both the "Attachment" and the "Superseded by" link types. The **Find documents with** option allows you to determine whether you want to return documents with at least one of the selected links, or if you want to restrict your search to documents that have all the selected links.

4.2.1.12. Tags



The **Tags** search allows you to find all documents with a particular tag. If you use an informational tag to specify which documents are urgent, for instance, you could use a **Tag** search to find all urgent documents. If you use tag comments, you can also search for documents whose tag comments contain a certain word or phrase. If you select more than one tag, the **Find entries with** option allows you to determine whether you want to return documents with at least one of the selected tags, or if you want to restrict your search to documents that have all the selected tags.

4.2.1.13. Created By

This search type allows you to find all documents and folders created by a particular user. It will also return shortcuts created by that user. (Note that it is the user who created the shortcut that is relevant in this case, not the user who created the document or folder that the shortcut leads to.) You can use wildcards with this search type. The search type is not case sensitive.

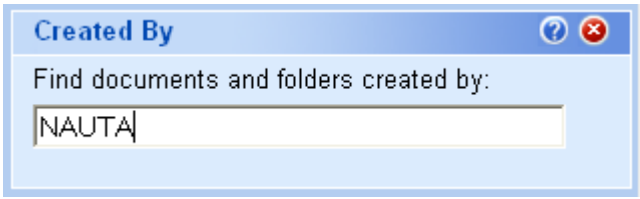
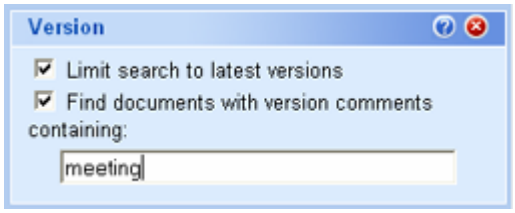


Figure 34: The Version search.

4.2.1.14. Version



This search type allows you to search for a particular word or phrase within version comments. You can also specify that the search should only return the latest version of a document. If a document is not part of a version group and therefore has no versions, it will also be returned. Note that **Limit search to latest versions** cannot be used on its own; it must be used in conjunction with another search. However, **Limit search to latest versions** doesn't need to be combined with **Find documents with version comments containing** – the two types of version searches can be used independently of one another.

4.2.1.15. Checked Out Document

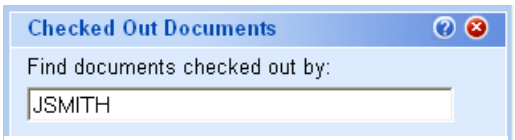


Figure 35: The Checked Out Documents search.

You can locate the documents checked out by a particular user using the Checked Out Documents search. This search will return all documents checked out by the specified user.

4.3. Combining Searches

You can combine multiple searches by simply selecting more than one search type in the Search pane. Many search types lend themselves well to combined searches, and one search type – **Within Folder** – can only be used in conjunction with other searches.

For instance, you might want to find the most recent version of all invoices created by the user AKIM. You could do this by combining a **Field** search for documents with the template "Invoice," a **Version** search specifying **Limit search to latest version**, and a **Created By** search for the user AKIM. This would return only searches that fulfill all three criteria, quickly pointing you to exactly the documents you want.

Searches combined in this manner can only be combined as AND searches. In other words, documents will only be returned if they meet all search criteria. If you want to combine multiple searches more flexibly, see Section 4.4. Advanced Searching.

4.4. Advanced Searching

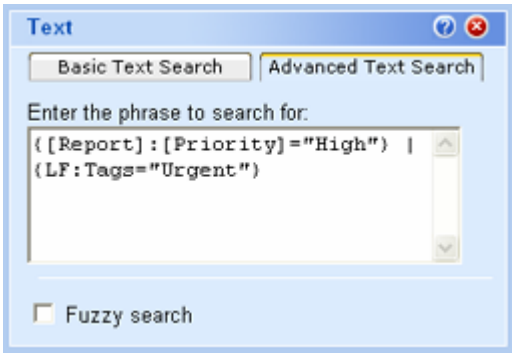
Advanced searching is a powerful way to locate documents and manage your Laserfiche repository. Using the advanced search syntax, you can combine searches in more flexible ways than you can with basic searches. You can perform an Advanced Search by selecting **Text** search and then clicking the advanced text search tab.

Users create advanced searches using the advanced search syntax. Each search type has its own syntax – for instance, the syntax for a text search is simply the word you are

searching for; the syntax for a template field search is {[*TemplateName*]:[*FieldName*]="*Value*"}; the syntax for a tag is {LF:Tags="*TagName*"}. A complete list of advanced search syntaxes is available in the Laserfiche Client help files. You can refer to this list while you are using the Laserfiche Client by selecting **Context** from the **Help** menu and navigating to the section "Finding and Retrieving Documents."

You can connect advanced search terms using & (which represents AND), | (which represents OR) or – (which represents NOT). If you wanted to find all reports that either had the template field Priority set to High or that had an Urgent tag, you would use the syntax {[Report]:[Priority]="High"} | {LF:Tags="Urgent"}. You can create even more complicated searches by setting off part of the search string in parentheses. For instance, a text search for invoice & (city | county) would return documents that contained either the word invoice and the word city or the word invoice and the word county.

Wildcards can be used with most advanced searches.



4.5. Search Options

The Search Options dialog allows you to specify the fields that will be displayed in the search pane and to configure the appearance of searched-for text. To open the Search Options dialog, open the **Tools** menu and select **Options** and then **Search**.

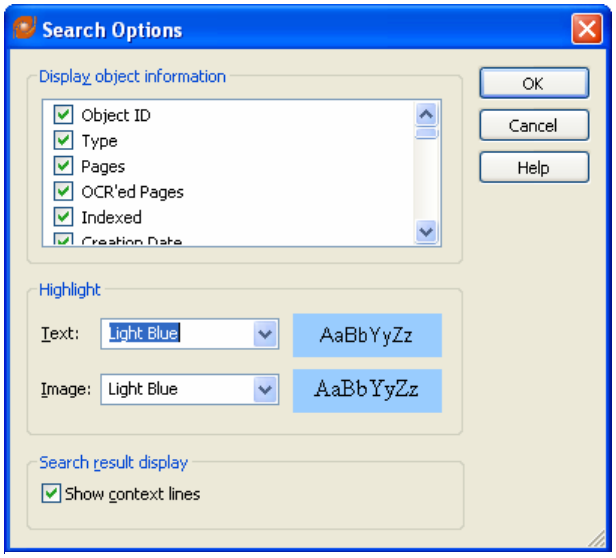


Figure 36: The Search Options dialog.

Display object information: You can configure which columns are displayed in the search pane. This allows you to display some or all of the template field values as well as more general information. When you perform a template search, the fields for that template will always be displayed in the Search pane.

Highlight: This option allows you to customize the colors used to highlight keywords found in the search results. This also allows you to set different colors to distinguish highlights on the image from highlights in the text.

Search result display: If you select the **Show context lines** option, the context of the text or sticky note search terms found in the document will be displayed when you select the search result in the search pane. If you clear this option, no context will be displayed.

5. Importing Documents

One method of adding documents to a Laserfiche repository is by importing electronic documents from Windows (for more information about electronic documents, see Section 2.5. Electronic Documents). Electronic document import is useful both for storing data that may change, such as Word documents that are in progress, and for storing files that are not text-based, such as photographs, audio, and videos. Any of these types of files can have metadata such as template data and document links applied, making them easily searchable even if there is no "full text." Additionally, image files, such as JPGs and TIFFs, can be imported and either left in their native format or converted to Laserfiche documents.

5.1. Import Methods

5.1.1. Importing Images and Electronic Documents

You can import single or multiple files from Windows into your Laserfiche repository through the Import Dialog. TIFF files and image files on the image conversion list will be saved as Laserfiche documents; other file types will be imported as electronic documents.

To import images and electronic documents

1. From the Laserfiche Client, select **File > Import…**.

2. The **Import Files** dialog will appear, displaying the Windows folder system. Browse to and select the file(s) you wish to import. Click **Import**.

   Note: If your options are set to skip the Import to Laserfiche dialog, Laserfiche will import at this time, and the following steps do not apply. See Section 5.2.1. Configuring Behavior for New Documents for more information.

3. The **Import to Laserfiche** dialog will appear for the first (or only) file you have selected for import.

   In the **General** tab, name the document and type in or browse to the appropriate folder where you want the document stored

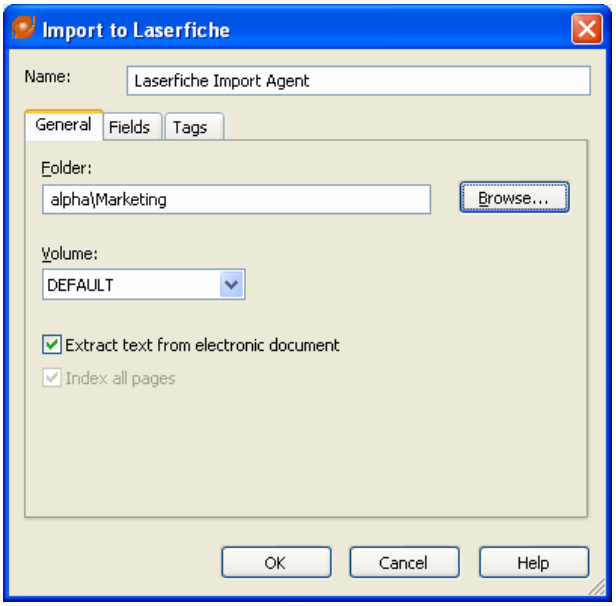


Figure 37: The Import dialog.

in Laserfiche. Select the correct Volume and choose whether or not you want to OCR or extract text (when possible).

4. Click on the **Fields** tab if you want to enter metadata in the template.

5. Click on the **Tags** tab to add tags.

6. Click **OK** when finished.

7. If you have selected multiple files for import, the next **Import to Laserfiche** dialog will now appear. Repeat steps 3-8 for each file you are importing.

5.1.2. Importing Briefcases

Briefcases are collections of files exported from Laserfiche. Briefcases retain the folder structure of the exported folders. The metadata (field information, version information, etc.) will also be included. Field data may be applied differently if the briefcase you are importing contains a template or templates that do not exist in your repository. For example, you might import a briefcase containing a document with a template called Accounts Payable, but not have the same Accounts Payable template in your own repository. In that case, Laserfiche will look for the closest match. (If you have the Manage Metadata privilege, you can choose to create the Accounts Payable template if it does not already exist.)

To import a briefcase

1. From the **File** menu, select **Briefcase**.

2. Select the briefcase you would like to import.

3. The **Import Briefcase** dialog will open. Select the folder and volume to which you would like to import the briefcase, and click **OK**.

4. If the documents or folders in the briefcase have templates, the **Template Selection** dialog will open. This dialog will display the templates found in the briefcase and the template in the repository which is the closest match. If you do not want to match the template in the briefcase to the indicated template, you can click the **Reassign Template** button. If you have the **Manage Metadata** privilege, you can choose to add it as a new template. If there are more than one

possible matching template, you can select the template you want to use from the dropdown box. Or you can choose to discard the field data for entries with the template. Once you have finished template selection, click **OK** to complete briefcase import.

5.1.3. Dragging and Dropping From Windows

The simplest way to import documents into Laserfiche is to drag them from Windows and drop them into a folder in Laserfiche. When you drag and drop files, they will be imported according to the default import settings you have configured. If you import a nested folder structure from Windows, Laserfiche will automatically recreate it in Laserfiche and import the documents contained in all of the folders.

To drag and drop from Windows

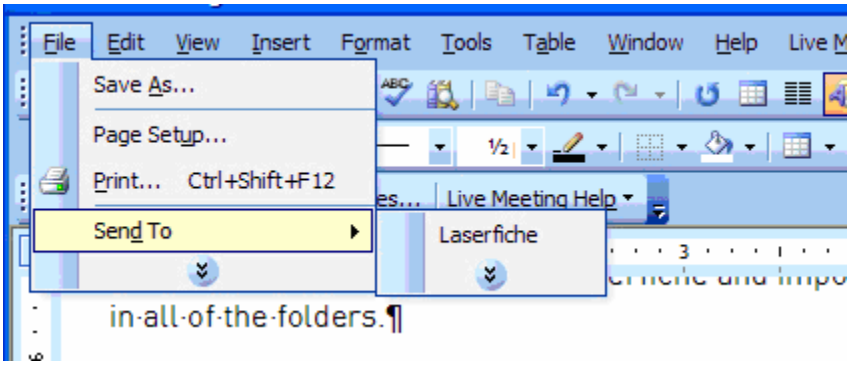
1. Select file(s) or folder(s) in a Windows folder and drag the selection into the Laserfiche Client window.

2. Drop the selection into the appropriate Laserfiche repository folder.

3. The **Import to Laserfiche** dialog will appear unless your default behavior is configured otherwise (see "Configuring Behavior for New Documents" above). Proceed as outlined in the "Import Dialog" section.

5.1.4. "Send To" from Windows and Office Applications

Laserfiche is integrated with Microsoft Office and provides the ability to send documents directly from Office applications using the **File** > **Send To** > **Laserfiche** menu option.



Office documents that are sent directly to Laserfiche can be indexed and filed in Laserfiche even if the Laserfiche Client is not open.

You can also import files of any type from Windows Explorer by right-clicking the file and selecting **Send To** > **Laserfiche**.

To import using Send To

1. Begin by either selecting **File** > **Send To** > **Laserfiche** in a MS Office application or by right-clicking a file in Windows and selecting **Send To** > **Laserfiche**.

2. Either method of Send To will bring up the **Laserfiche Repository Selection** dialog box. Select the repository into which the document(s) will be sent, choose your login preference, and click **OK**.

3. The **Import to Laserfiche** dialog will appear unless your default behavior is configured otherwise (see "Configuring Behavior for New Documents" above). Proceed as outlined in the "Import Dialog" section.

5.2. Configuring Document Import

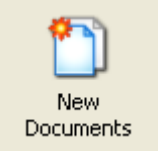
Imported documents will be handled as new documents. For information on the options for new documents, see Section 5.2.1. Configuring Default Behavior for New Documents.

The New Document options also allows you to customize certain behaviors specific to importing: the Outlook Import Options and the Import Conversion List.

5.2.1. Configuring Default Behavior for New Documents

Once you have imported a few documents, you will notice that there are numerous options displayed at each import. It is likely that you will want similar settings applied to most of the documents that you import into your repository. Laserfiche allows you to specify the default settings for imported documents, saving you the trouble of making the same choices every time you import.

To configure your default settings



1. In the Laserfiche Client, select **Tools** > **Options** from the task bar at the top of the screen.

2. Double-click the **New Documents** icon.

3. The **New Document Options** dialog will appear.

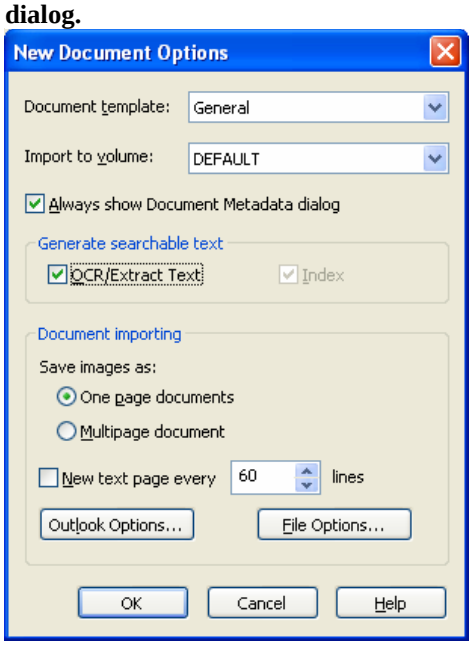
4. Under **Document template**, select the template that you will use the most frequently.

5. Under **Import to volume**, choose the volume that you will use most frequently. (There may be only one volume available.)

6. Under **Always show Document Metadata dialog**, choose whether you would like the **Import to Laserfiche** dialog to open when you import documents. Check the box if you will be entering metadata upon import or if you want to manually name and file documents; leave it blank if you will be importing large numbers of documents at once and entering the metadata later, or if you will be using default values to fill in the fields.

7. Under **OCR/Extract Text**, check the box if you would like Laserfiche to generate fully searchable text on every document imported (when possible). OCR, or Optical Character Recognition, is a method of 'reading' the text from an image. Text Extraction allows you to generate text directly from the text stream of an electronic document. Leave this box blank if you would like to manually OCR/Extract Text at a later time or leave some documents without full text. You can also choose whether or not to index the new document. Documents with text must be indexed before you can locate them with a full-text search. (If the repository is configured to automatically index new documents, this option will be selected and greyed out.) See Section 2.2.2. Text Pane for more information about OCRing and extracting text.

Figure 38: The New Document Options dialog.



8. In the **Save images as** option, determine whether multiple images will be saved together as a single multi-page document or kept as separate documents. For instance, if you were importing five images all belonging to the same document, you would select **Multipage Document**; if you were importing five images that were separate documents, you would select **One page documents**.

9. Under **New text page every ___ lines**, you can set this dialog to break up text documents or OCRed or extracted text into pages.

10. Configure your **Outlook Options** and **File Options** (see Section 5.2.2. Outlook Import Options and Section 5.2.3. Import Conversion List Options).

11. Click **OK**. You can also close the Options dialog if you have no other options to configure at this time.

5.2.2. Outlook Import Options

The **Outlook Import Options** dialog, which is accessed from the New Document Options dialog, allows you to tell Laserfiche what information it should extract from Outlook e-mails and where to put that information in the template. By associating e-mail properties with template fields, you can automatically populate template data upon import of Outlook e-mails.

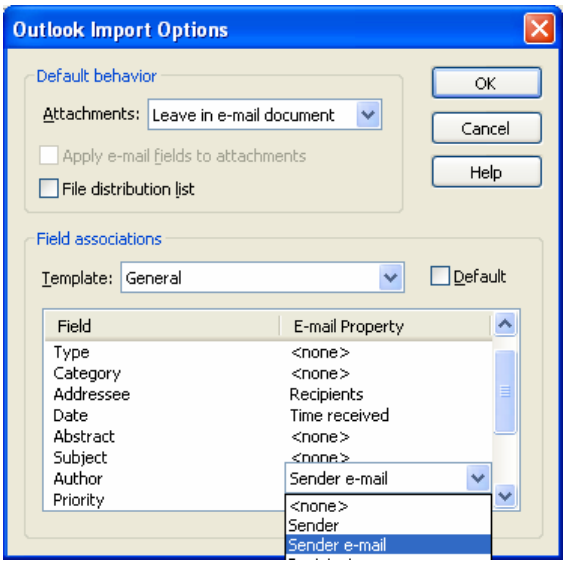


Figure 39: The Outlook Import Options list.

To configure Outlook options

1. From the New Document Options dialog, click the **Outlook Options…** button. The Outlook Import Options dialog will appear.

2. The **Attachments** pull-down configures what will happen to any attachments on the Outlook e-mail. You can keep the attachments as part of the e-mail (**Leave in e-mail document**), import them into Laserfiche as separate electronic documents (**File separately**), or both (**Leave in and file a copy**). Choose the behavior that you would like Laserfiche to perform by default.

3. **Apply e-mail fields to attachments** will be an available option if you choose to import attachments as separate documents (whether you are also keeping them as part of the e-mail or not). Check this box if you would like the extracted metadata to apply to the attachments as well as the e-mail.

4. Check **File distribution list** if you would like Laserfiche to add a page to the stored document that lists all recipients of the e-mail. This page would include the display names and e-mail addresses of everyone listed in the To and CC properties of the e-mail. If you are the sender of the e-mail, the BCC property will also be included.

5. Next, you will configure the field associations for each appropriate template. From the **Template** pull-down, choose the template you wish to configure.

6. For each appropriate field in the template, choose an e-mail property by clicking on **<none>** (or the current property listed) under the **E-mail Property** column, pulling down the menu, and choosing the correct property.

7. Once you have chosen e-mail properties for all applicable fields in the template, you can configure another template if you wish. To do so, simply pull down the **Template** menu to change templates, and repeat the process of setting field associations (step 6).

8. To set one of the templates as the default for Outlook e-mails, choose that template in the **Template** pull-down and click the **Default** checkbox next to it. This is strongly recommended, as you can use it to ensure that all e-mails will be imported with a consistent template and with the appropriate fields filled with the correct default values.

9. Once you have configured all desired templates, click **OK**.

5.2.3. Import Conversion List Options

The **File Options** dialog allows you to specify which image files should be automatically converted into Laserfiche files (images and/or text). This setting is helpful if you have images that are scanned or otherwise received outside of Laserfiche Scanning, but you would like them to be stored in Laserfiche format so that you can work with them in the Document Viewer.

To configure File Options

1. Click the **File Options…** button from the New Document Options dialog (see above). The **Import Conversion List** dialog will appear.

2. If you wish to add a file type that is not listed, choose it from the **Enter or choose a file extension** drop-down or enter it as text in the field, and then click **Add**.

   Note: Although many file types are listed, you should only choose image files or ANSI text files. Other file types, including MS Word and other electronic documents, will be converted into "garbage" text. To generate TIFF images that you can work with in Laserfiche from electronic documents, you must use Snapshot. See Section 7. Snapshot for more

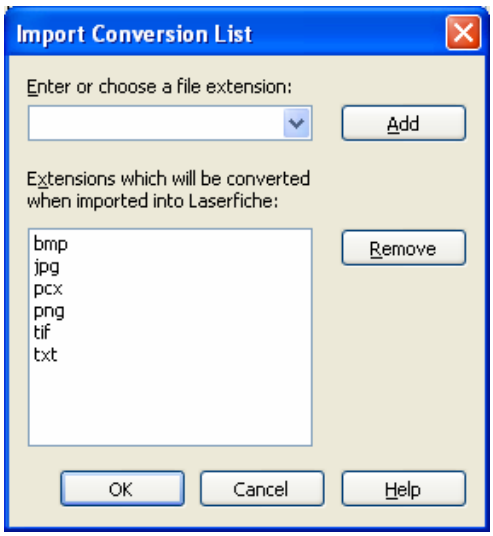


Figure 40: The Import Conversion List dialog.

information.

3. If you wish to store some image types in their native formats, remove them from the list by selecting the appropriate extension under **Extensions which will be converted when imported into Laserfiche** and clicking **Remove**.

4. When finished, click **OK**.

5.2.4. Autonaming

The Autoname dialog allows you to configure the name that will be applied to Laserfiche documents by default if the user does not manually input a document name. You can set your autonaming options by selection **Options** from the **Tools** menu and then clicking on the **Autoname** icon.

Default Document Name: The default document name option allows you to specify the name that will be automatically assigned to documents if the user does not input a document name. You can insert tokens into the default document name by selecting the token – Date, User name, et cetera – and clicking Insert. See Section 10. Appendix: Tokens for more information.

You can also determine which types of new documents should use this default document name. For instance, you might want to use the name when creating a blank document or scanning a document, but not when importing a file.

Count. By default, if you use the Count token, the counter will start with one and increment every time it is used. For instance, if your default document name is "New Document $count$," the first document you create will be called "New Document 1," the second will be "New Document 2," and so on. To set the counter to start at a different number, input that number in the **Current count token** box.

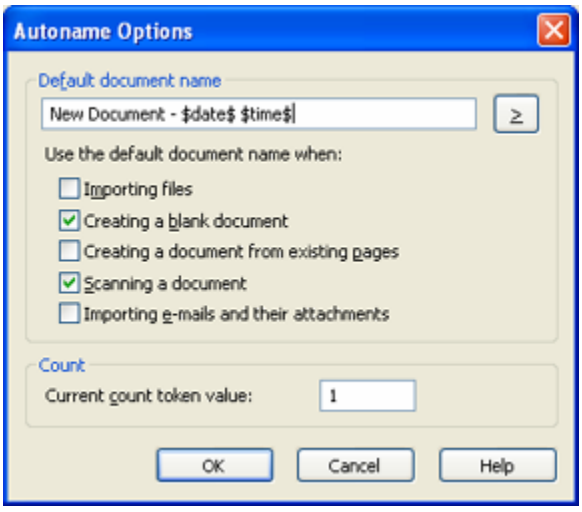


Figure 41: The Autoname Options dialog.

5.2.5. Best Practices for Importing

Each of the outlined methods will work for importing any type of electronic document or image, so ultimately you should choose the method that seems easiest to you. Here are a few tips for choosing an import method:

- To import Microsoft Office documents that you have just created or modified, using the Send To method is often the quickest.

- When importing large numbers of documents, it is often a good idea to configure your import settings to skip the **Import to Laserfiche** dialog; otherwise, this dialog will be presented for each document during the import.

- The **Import to Laserfiche** dialog can be helpful when importing individual or small numbers of documents, as you can fill out the template information and assign any tags in one step. This way, the document's metadata is complete and ready for use upon import.

- Make sure to consider what file types you want automatically converted to Laserfiche documents. By default, many common image types (such as JPGs) are automatically converted in order to allow people to scan images in third-party applications and import them as Laserfiche documents. However, you may want to store some images, such as photos, in their original format. See the Import Conversion List section above for more information. Note that many functions of the Laserfiche image viewer are only available for images that are stored as Laserfiche documents.

- Keep in mind that Laserfiche documents can be exported in a variety of file formats when deciding whether to convert image files.

  Example: Lisa has just finished an invoice in Microsoft Word, and wants to import the document into Laserfiche. She does not have Laserfiche open, so she simply chooses File > Send To > Laserfiche in the Microsoft task bar. She typically only imports a few documents at a time, so she has her import options configured to show the **Import to Laserfiche** dialog. This allows her to fill out the template information without opening the Laserfiche Client. She chooses to extract text from the document and completes the template, then sends the invoice to Laserfiche.

  Example: Robert received a CD of files from a customer. He wants to import the entire CD, about 50 files of different types, into a folder in Laserfiche. The CD contains some images of the file type PNG, and Robert wants to make sure they will be converted so that the users can work with them in the Document Viewer, add annotations, and so on. However, he does not want to go through the

Import to Laserfiche dialog for each file. In the **New Document Options** dialog, he turns off the option **Always Show Metadata Dialog.** Then, under **File Options**, he adds PNG to the list of files that will be converted to Laserfiche documents upon import. After configuring these settings, he opens the CD in windows, selects all of the contents, and drags them into the appropriate folder in Laserfiche. Laserfiche reconstructs the folder structure and file names without prompting Robert for any further information. If he wants to add metadata, he can do so in Laserfiche once the import finishes or at a later time.

6. Exporting and Printing Documents

Once you have documents in Laserfiche, you will want to not only browse or search for documents, but use the information that you find. There are a variety of ways of getting information back out of Laserfiche so that you can use it for other purposes or share information with other people. This chapter will cover exporting, copying and pasting portions of a document, and printing documents.

Exporting a document typically means saving it in a form that someone else can use. It often involves changing the file type or packaging the file differently so that people without Laserfiche, or other Laserfiche users who do not have access to your repository, can open it. There are many options for export in Laserfiche, and when choosing how to export your documents, you should keep in mind your reasons for exporting, as they will frequently dictate your choices. For example, when choosing what type of image file to use when exporting images, you would want to consider whether or not the exported file needs to be in color. When e-mailing a document, you want to consider whether your recipient will be able to open that file type.

There are five types of files that you can export from Laserfiche: images, text, electronic documents, briefcases, and contents lists. Each type includes different amounts of information.

When you export **images**, you are simply exporting the TIFF images that are associated with the document—the scanned pictures of the pages. You can export images to a variety of file types. However, when you export images, you will not get document metadata and the text associated with the image, but only the image itself. The only exception is when you export images as a PDF, the full text of the document will be searchable if the images are OCRed.

When you export **text**, you are simply saving copies of the OCR or extracted text of a document in the form of text files. The text file will contain no images or metadata.

Likewise, **electronic document** exporting simply saves a copy of the electronic document in its native format. Again, no images, associated text, or metadata is included.

A **briefcase** is a Laserfiche document or set of documents that is packaged so you can move it from one Laserfiche repository to another. The briefcase includes any images, text, electronic document information, or metadata that are associated with the document. However, a briefcase can only be opened in the Laserfiche Client.

A **contents list** is simply a .csv (Comma Separated Values) file that lists the contents of a folder or a search result. This file can be opened in Microsoft Excel or other spreadsheet programs. The list will contain all of the items in the current folder or search results, along with all additional information that is currently being displayed in the Details view

of the contents pane, listed in the order in which it is displayed. This function provides a handy inventory of a folder or search results list.

6.1. Export Methods

6.1.1. Text, Images and Electronic Documents

There are a few ways to export text, images and electronic documents. The methods may vary slightly for each type of file you are exporting, but they are all very similar.

The first way to export is via the Export dialog. To access this dialog, select the document you wish to export, and then choose **File > Export** from the task bar, or click the **Export** toolbar button. (The **Export** toolbar button is not present on the toolbar by default, but it can be added; see Section 2.3.1. Customizing the Toolbar for more information.) You will then have to choose the appropriate export type (**Text**, **Images**, **Briefcase**, **Electronic document** or **List contents**). The options that are unavailable, such as **Electronic document** when you have selected an image, will be grayed-out.

The resulting export dialog will give you the options available for the type of file you have chosen to export. Each will allow you to browse to the Windows folder where you wish your exported document(s) to reside and to name the file(s)—recall that if you are exporting a multiple-page document as single-page image or text files, the export will result in multiple files. The **Export Text** dialog will also let you choose a page range and access the **Text** tab of the **Export Options** dialog, in case you want to change your defaults. Though there is **a Save as type** field, the only option available for exporting text is a text file (*.txt).

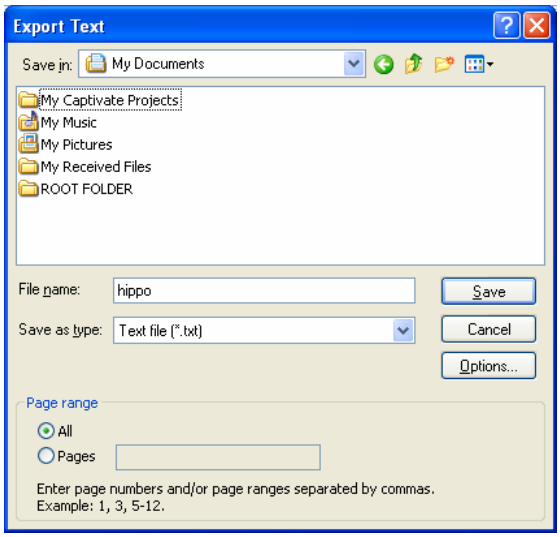


Figure 42: The Export Text dialog.

The **Export Images** dialog is similar to the text dialog, in that you can choose a page range and can access the **Images** tab of the **Export Options** dialog. However, when exporting images, you also have the option of changing the file type. The **Save as type** field will automatically be set to export according to the defaults that are configured in the **Export Options**; however, you can change the type as desired for each export by pulling down the menu and choosing another file type. Note: If you export images from a document that has been OCRed as a PDF, the PDF will be created with a text layer and will be fully searchable.

When exporting an electronic document, the **Export Electronic File** dialog will appear. This dialog is very simple, allowing you to browse to the save location and name the file. As when exporting text, you are shown a **Save as type** field, but you cannot change it.

The file will be exported in its native format. The files will not contain metadata, annotations, etc.

The export dialogs covered so far allow you to export single documents or multiple documents of the same type—for example, you could export images from a single document, or from many documents by selecting multiple documents that contain images and then choosing **File > Export > Export images**.

However, you may wish to export entire folders that contain mixed file types—for example, a folder with both imaged documents and electronic documents. There are two ways to export a folder or a folder structure in a format that can be viewed outside Laserfiche (for exporting folders that will be used in another Laserfiche repository, see the next section, **Briefcases**). The first way, which requires the Laserfiche E-Mail Plug, is to drag a selected Laserfiche folder and drop it into a Windows folder or Desktop. The second way is to right-click a folder and choose **Export contents**. Either way, the Laserfiche folder will be recreated in Windows, complete with any subfolders, images, and electronic documents. Metadata will not be included. Laserfiche documents that contain images (whether or not they also contain text), will be exported as images only. All files will be exported using the default settings that you configured in the **Export Options** dialog.

6.1.2. Briefcases

As explained in the previous sections of this chapter, briefcases allow you to transport Laserfiche documents between repositories. You can include any combination of documents or folders in a briefcase.

To export a briefcase, first choose the documents that you wish to include in the Laserfiche Client. You can do this by simply selecting a folder; by selecting one or more documents, folders, or shortcuts within a folder; or by making one or more selections in a search results window.

From the task bar, choose **File > Export > Briefcase**. The **Export Briefcase** dialog will appear.

You will be able to name the briefcase and choose a destination. You can also access the **Export Options** dialog by clicking the **Options…** button.

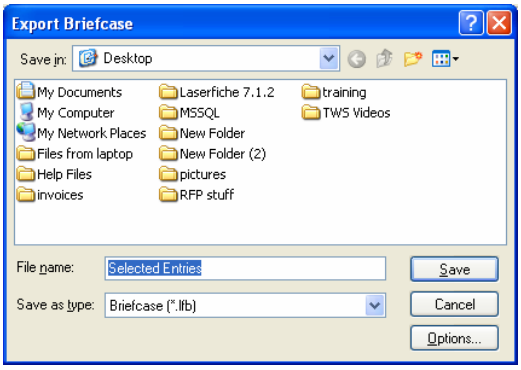


Figure 43: The Export Briefcase dialog.

6.1.3. E-Mailing Documents

Note: E-mailing documents requires the Laserfiche E-Mail Plug-In.

When it is necessary to export documents to give them to someone who does not have access to Laserfiche, emailing them directly from the system is often the simplest thing to do. Documents can be emailed as images or PDF files and sent from your local email account. Laserfiche can even warn you if your attachments exceed a specific size or Zip a group of attachments to save effort and bandwidth.

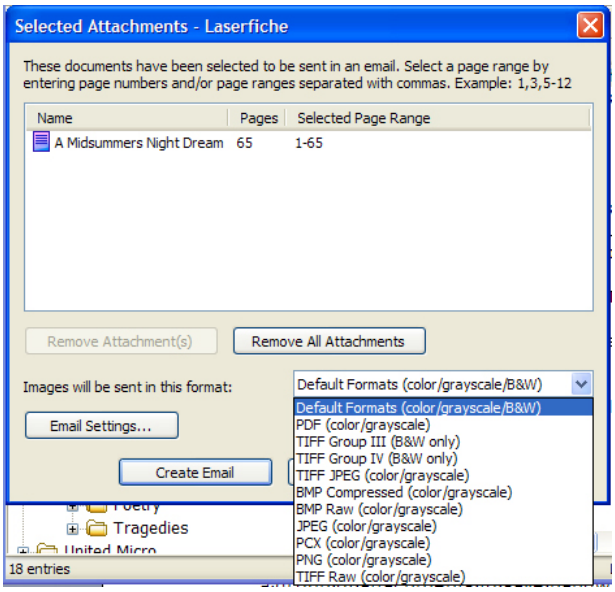


Figure 44: The E-Mail Documents dialog.

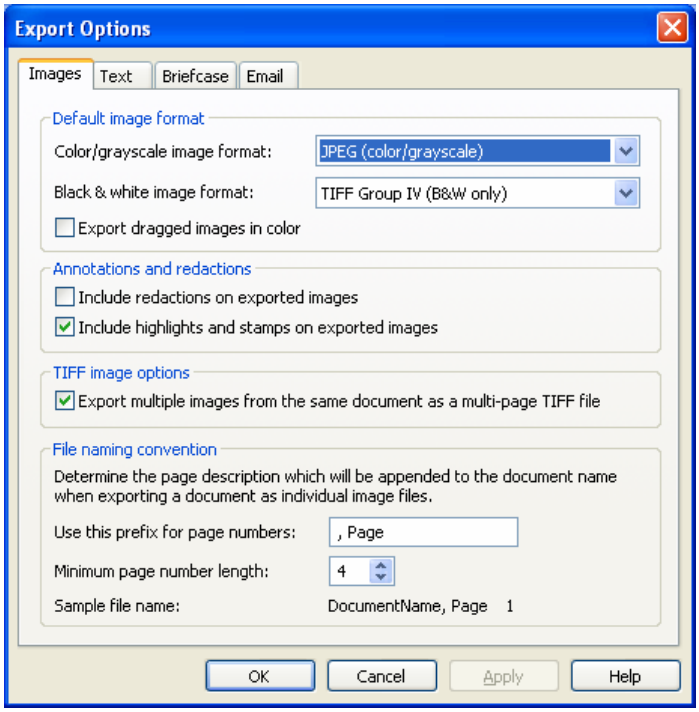
The E-Mail Plug-In allows you to send attachments straight to Microsoft Outlook via two ways: you can either simply drag the document(s) from the Laserfiche Client into your Microsoft Outlook window, or you can select the document(s) you wish to send and choose **File > Email Document(s)**. You will then be able to choose a file type for any imaged documents, as well as access the **Export Options** dialog by choosing **Email Settings…**. Outlook will then open a new e-mail message from your account with the chosen documents as attachments.

6.2. Export Options

Like many functions in Laserfiche, exporting requires you to make a few decisions that, if you have to make them repeatedly in your everyday tasks, could get tedious. For that reason, you can configure the default behavior to match the choices you would make most of the time. To do this, you would use the **Export Options** dialog, which you can access by choosing **Tools > Options** in the task bar, and then clicking on the **Export** icon.

The dialog has four tabs. The first tab is where you configure your options for exporting **Images**.

The first box in the tab is **Default image format**, which allows you to choose what format will be selected by default when you export an image. This default format can differ depending on whether you are exporting an image that is stored in color/grayscale, or in black-and-white. To set these defaults, select the appropriate formats from the pull-downs, **Color/grayscale image format** and **Black & white image format**.



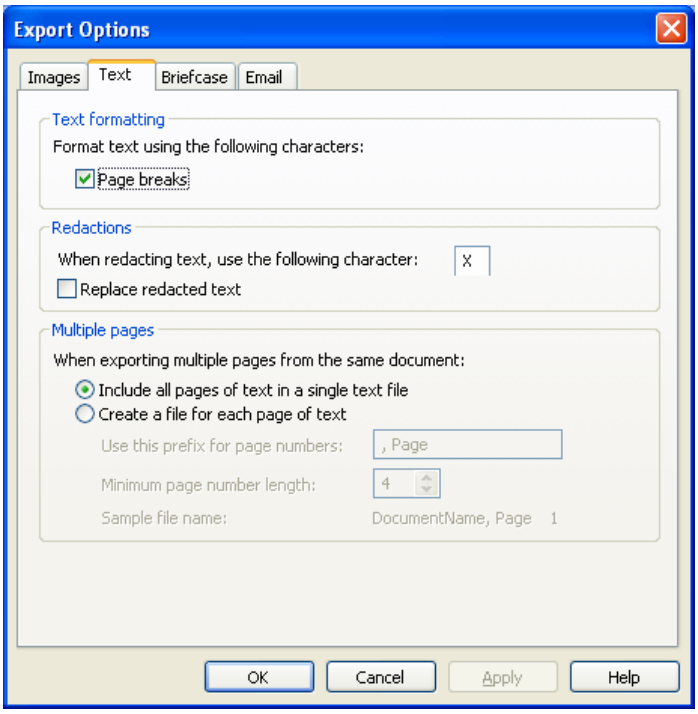
One method of exporting, which will be covered later in the chapter, is by dragging documents from Laserfiche and dropping them into Windows. When you export by this method, all images will be exported in the same format. **Export dragged images in color** determines whether this format will be color/grayscale (checked) or black-and-white (unchecked).

Under **Annotations and redactions**, choose whether you want these items to be visible on the exported image. For **Include redactions on exported image**, this controls whether the redactions will be present on images exported by a user with sufficient rights to see through redactions—if the user does *not* have access to redacted portions of the document, the exported image will have permanent redactions regardless of this setting.

Under **TIFF image options**, check **Export multiple images from the same document as a multi-page TIFF** if you would like imaged documents to export in TIFF format as one file with multiple pages. Single-page TIFFs have a separate file for each page.

Under **File naming convention**, these options determine how files will be named if you choose to export them as single-page TIFFs, since a single Laserfiche document will be exported as many files, one for each page.

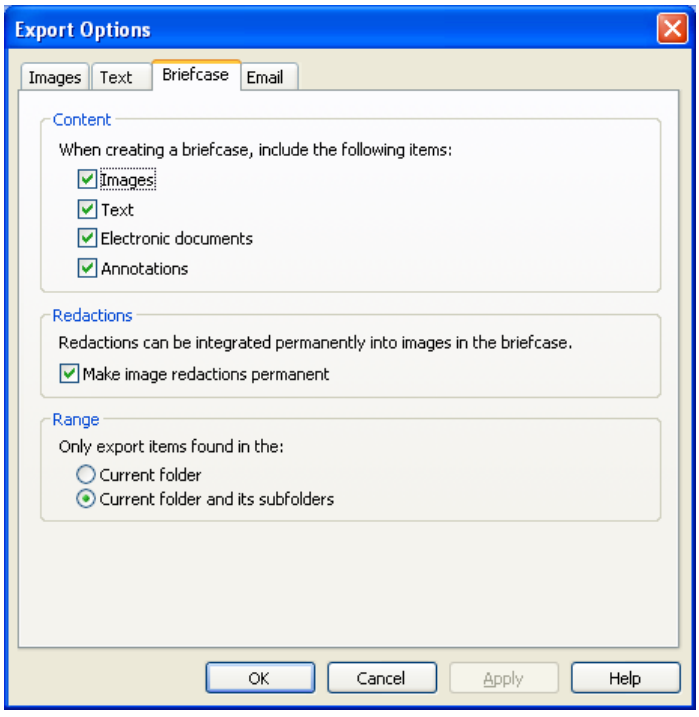
The options for exporting **text** are fairly straightforward. Under **Text formatting**, check **Page breaks** if you would like your text document to include page breaks. Under



Redactions, choose whether you would like to replace redacted text with a character, and if so, which character you would like to use. For example, if you choose X, redacted text will be replaced with a series of Xs. If you redacted the words "not to be" in the famous quote from Hamlet, the text would be exported as, "To be or XXXXXXXXX, that is the question." As with images, if the user who is exporting does *not* have access to redacted portions of the document, the exported text will be replaced with a series of Xs regardless of this setting.

Under **Multiple pages**, these options are much like those in the Image tab. If you choose to save a separate file for each page of text, you will have to set a naming convention for the pages, since each document can be many exported text files.

Briefcases allow you to transport Laserfiche documents between repositories. Briefcases are an export of a Laserfiche document or folder of documents. You can include—or exclude—images, text, electronic documents, and annotations. The metadata (field information, version information, etc.) will be included; however, field data may be applied differently in another repository if that repository does not have the same template that the original documents used. For example, you might briefcase a document with a template called INVOICE. If the repository to which you move the document does not have the same

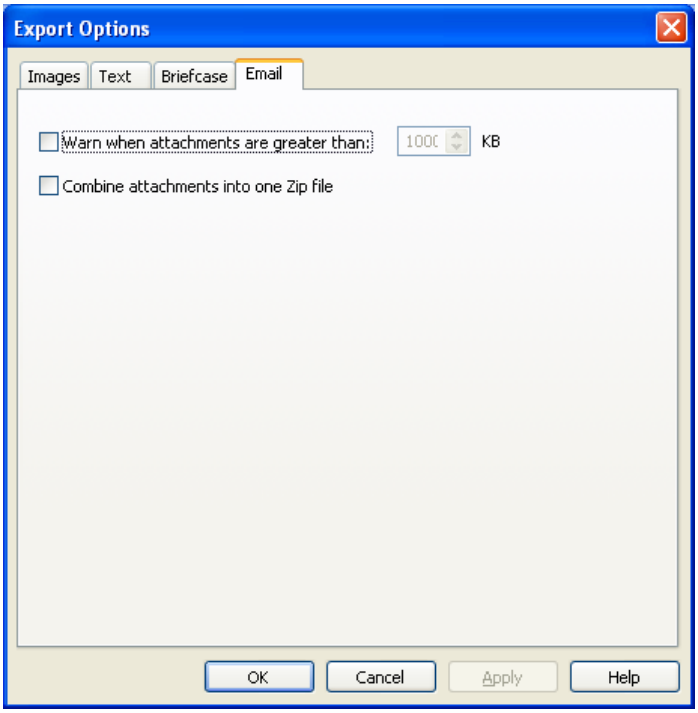


INVOICE template, it will look for the closest match. (If you have the Manage Metadata privilege, you can choose to create the INVOICE template if it does not already exist.)

Under **Redactions**, choose whether or not to **Make image redactions permanent**. Like the option in the Image tab, this option allows those with the appropriate privileges to see through redactions to make the redactions permanent in the exported briefcase. If it is unchecked, the redactions will still be in place when the briefcase is imported to another Laserfiche repository, and Laserfiche users with the **See Through Redactions** right in that repository will be able to see through them. Thus, you should choose to make image redactions permanent if they will be imported into a repository whose users should not be able to see the redacted information even if they have this right. A user without the privileges to see through redactions on the documents included in a briefcase will export permanently-redacted images regardless of this setting.

Under **Range**, choose whether you would like only documents in the current folder, or documents in the current folder and its subfolders. Note: Briefcases take up a lot of disk space. It is often a good idea to create a folder and place shortcuts to the documents you wish to briefcase in that folder, rather than briefcasing an existing folder that has extraneous, unwanted documents in it.

The **Email** options are very straightforward. Simply choose whether you want a warning when attachments exceed a certain size—this setting is helpful when your e-mail server, or the recipient's e-mail server, has a size limit for outgoing/incoming e-mail. Then choose whether or not you would like to combine attachments into a Zip file. Zip files allow your recipient to download attachments as a single file, which is nice when you need to send a lot of documents.



6.3. Copying and Pasting

Sometimes exporting part of a document is more useful than the whole thing. With Laserfiche you can copy a portion of a document and past it into another application such as an email or Word document. If the document has been OCRed, you have the choice of pasting the image or text from the document.

To copy and paste portions of the image and/or text

1. In the Laserfiche Viewer, click and drag your cursor over a portion of an image to select it, and either select **Edit > Copy** from the task bar, or type **Ctrl-C**. Laserfiche will copy both the image and the text associated with the image, if the document has been OCRed.

2. Paste the selection into the program of your choice. Depending on the type of application, either the text or image will be pasted. If you are pasting into a program, that can display either text or images, such as MS Word, use the **Paste Special** command (or equivalent).

6.4. Printing

Printing from Laserfiche includes the usual options, such as page range, number of copies, etc, as well as a few special ones. One unique feature is the **Print Type** option, which allows you to choose to print **Images**, **Text**, **Images and text**, or **Zoomed area of image.** The last option allows you to print only the area that is showing in the Laserfiche Viewer, and is useful for printing detail on large or intricate images. The **Auto-detect page orientation** option will automatically determine whether the image should be printed with a Portrait or Landscape orientation.

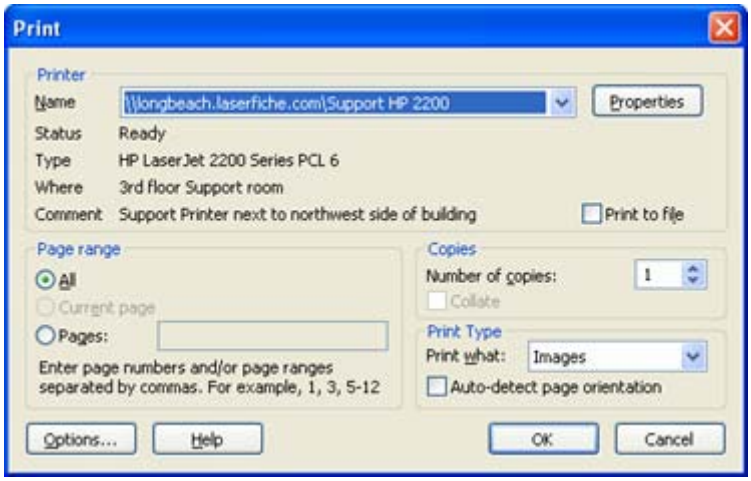


Figure 45: The Print dialog.

Also, the Options… button will bring up a Print Options dialog, which allows you to choose whether you want applicable annotations and redactions to be printed. You can also choose whether to print the image in its actual size, or scale it to fit the page on which you are printing (**Scale to fit**).

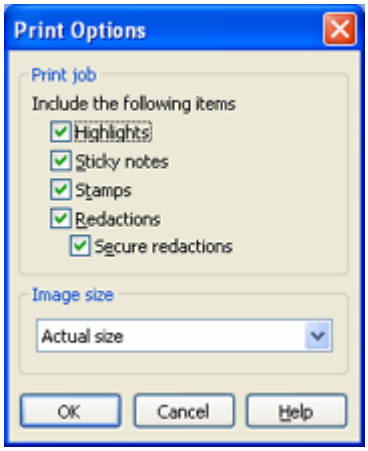


Figure 46: The Print Options dialog.

7. Snapshot

Laserfiche Snapshot is a program that allows you to print TIFF images of documents. Snapshot works in two ways. First, you can use Snapshot on electronic documents that are already in the Laserfiche Client. This adds a TIFF image to the electronic document, and generates searchable text for the document. Second, you can use Snapshot outside Laserfiche in any program that allows you to print. This will create a TIFF image and send it to Laserfiche as a Laserfiche document.

7.1. When to Use Snapshot

Snapshot can be used in several different ways for several different purposes.

- **Creating archived images**. Snapshot creates a TIFF image of a document and stores it in Laserfiche. Although the original document might be altered, the TIFF image will not be altered unless you delete or overwrite it. This is important if you need unalterable archived copies of documents whose original format is alterable.

- **Making electronic documents readable for users who do not have the native application.** For instance, you may have a CAD or other drafting document that you would like to make available to everyone in your organization. However, you know that some users don't have a CAD program installed. Since electronic documents open in their native formats, these users won't be able to view the documents. If you Snapshot those documents, however, the TIFF images can be opened and viewed like any other Laserfiche documents, even by users who don't have the CAD program. If you use WebLink or Web Access, you might want users to be able to look at the document immediately upon opening it in that program. Without TIFF images associated with the electronic documents, you would need to download the electronic document to view it with these products. However, if you have printed TIFF images with Snapshot, those pages will be immediately viewable.

- **Extracting text from documents that cannot otherwise have text extracted.** Although many document formats can have text extracted from them with Laserfiche 7.2, some document formats still cannot have text extracted from them. If you wish to generate searchable text from those documents, you will need to print them with Snapshot and generate text from the images.

- **Preserving the formatting of extracted text**. Although text generated by text extraction is very accurate, its format may not be easy to read. For some document formats, extracted text creates a single long document with no formatting or line breaks. If you want text that is easily eye-readable, you may want to use Snapshot in those circumstances.

7.2. Snapshot Configuration

Once Snapshot has been installed, you should configure it to match the way you want to use it. This will save you time in the future, since setting defaults for the way that Snapshot documents are handled means that you won't have to configure it by hand each time you print a document using Snapshot.

When you open the Laserfiche Snapshot Configuration, you will be prompted to select a repository and log in to it. This is the repository which Snapshot will print to by default. Once you have logged in, you will be presented with the Laserfiche Snapshot Configuration dialog.

7.2.1. General

The General tab of the Laserfiche Snapshot Configuration dialog allows you to set some basic properties and methods for handling documents.

Document properties. This option determines whether the document properties dialog will be opened once a document has been printed. If you choose not to view the dialog after the document has been printed, the default settings will be applied to that document. If you will be printing many documents and do not want to stop and assign properties to each of them individually, or if you do not need to customize the properties beyond the default settings, you should select **Assign it default properties**. If you do need to modify the properties for individual documents printed to Laserfiche, you should select **Show\modify document properties**.

Settings. This option allows you to change the settings for the Snapshot printer itself. These settings include paper size and orientation, file formats, watermarking and annotation, and numbering. To modify these settings, click the **Settings** button. For more information on these settings, see Section 7.3. Snapshot Printer Properties.

Laserfiche repository. Here you can change your repository and the Laserfiche user you are logged in as. By default, this will be the same as the repository and user name you entered when you first opened the configuration dialog. Clicking the **Change** button will open that same dialog to allow you to change your repository and user name.

Count. This option allows you to set the starting number for the Count token. For instance, if you wanted to consecutively number documents starting with the number 1, you would select 1 in the **Set Count to** option, and then configure the document name to use the Count token. (See Section 7.2.2.. Destination, and Section 10. Appendix: Tokens for more information.) **Count** can be configured to use leading zeroes; for instance, if you would like all numbers to be generated with four digits (for instance, the first document would be 0001, the second 0002, et cetera), you would simply set the Count token to 0001. The number will be correctly incremented and printed with leading zeroes.

7.2.2. Destination

The **Destination** tab allows you to configure what the newly-created document will be named, where in your repository it will be placed, and what volume it will be stored in.

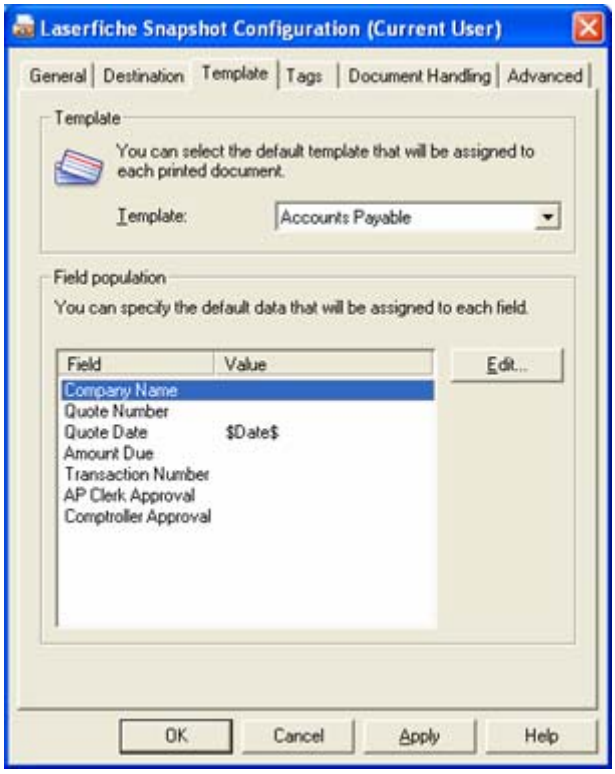
Document name. You can type a document name in this option that will be applied to any printed documents. Document names can contain text (such as 'New Document' or 'Printed Document'), tokens, or a combination of the two. For instance, you might want each document to be named "Report" followed by the date and time that the document was printed to Laserfiche. You could type "Report - $DateTime$" into the **Document name** option. When the document is printed, the DateTime token will be replaced by the actual date and time of printing.

Folder. This option allows you to specify the repository folder in which you want to store the printed documents. Click the **…** button to browse to a folder, or use the > button to insert a token. If you specify a folder that doesn't exist, Snapshot will create it. For instance, you could specify the path *RepositoryName*/Accounting/$User$. This would place the printed documents in a folder with the same name as the user who printed it, which in turn is inside the Accounting folder.

Volume. You can select the volume into which you want to store the image in this option. Simply select the volume from the list.

7.2.3. Template

The **Template** tab allows you to both set a default template and configure default values for that template's fields.



Template: This option allows you to select the template that will be applied to printed documents. Select a template from the list, or choose **<NO TEMPLATE>** if you do not want to automatically assign a template.

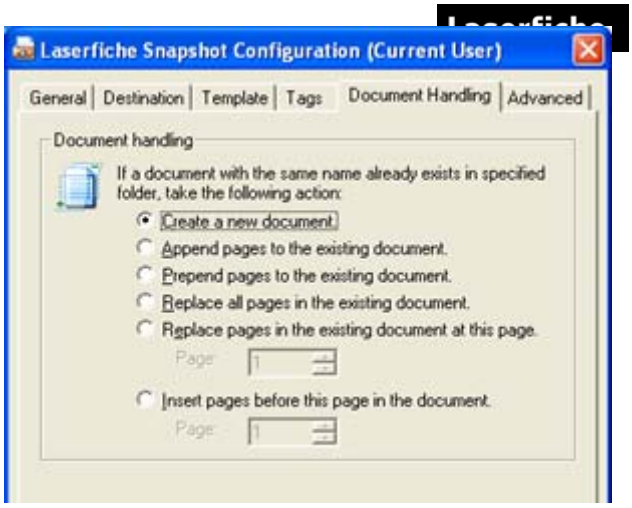
Field population. If you have selected a template in the **Template** option, you can set default values for that template's fields. As with document names, template field values can be set to static text, dynamic tokens, or a combination. You might, for instance, have an "Imported By" field, and set the value to $User$.

7.2.4. Tags

In the **Tags** tab, you can specify which tags (informational or security) will be applied to a document. Check the boxes for the tags you wish to apply by default to printed documents. As with other security, the tags available are determined by the user logged into the Laserfiche Snapshot Configuration utility.

7.2.5. Document Handling

In the **Document Handling** tab, you can specify what you want to happen if a document of the same name already exists in the same folder. **Create a new document** creates the printed document as a new document with (1) appended to the name. If a document of the same name with (1) appended already exists, the document will be created with a (2) appended, and so forth. **Append pages to the existing document** will add all of the printed pages to the end of the document. **Prepend pages to the existing document** will add them to the beginning of the document. **Replace all pages in the existing document** overwrites the existing pages with the printed pages, but maintains template, link, tag and version information. **Replace all pages in the existing document at this page** will leave all the pages in the original up to the specified page untouched, but will overwrite

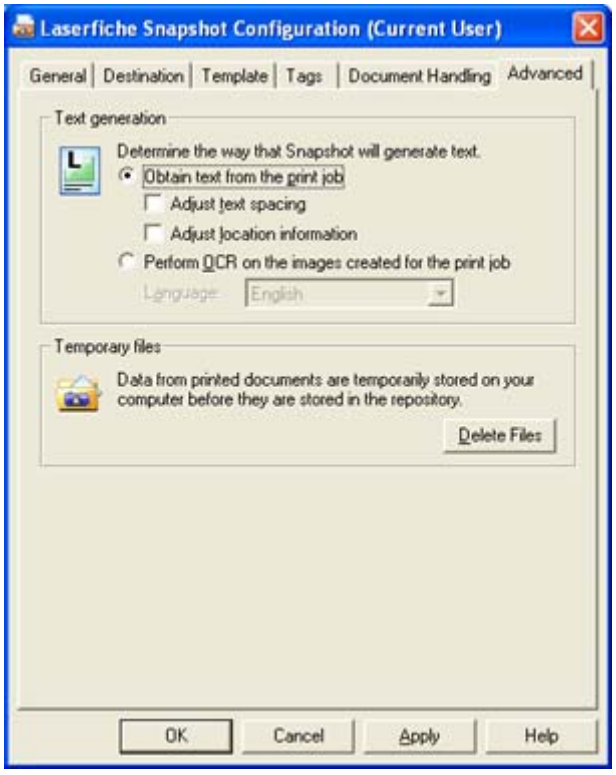


succeeding pages with the new, printed pages. **Insert pages before this page in the document** will insert the newly printed pages into the existing document at the specified point, without overwriting any pages.

The way you choose to handle documents with the same name will depend on how you use Snapshot. For instance, if most documents that you print are independent documents, you can assume that naming conflicts are coincidental. In that case, you would not want to merge or overwrite the existing document, and would choose **Create a new document**.

However, if you were frequently going to print new copies of existing documents, and you no longer wanted to keep the prior version, you might want to immediately overwrite it. In those situations, you would choose **Replace all pages in the existing document**.

Or you might print additional information intended for the same report or file. In that case, you might want to add the additional pages to the end of the document, and so you could choose **Append pages to the existing document**.



7.2.6. Advanced

Text generation. This option allows you to determine how Snapshot will generate text. If you choose **Obtain text from the print job**, the TIFF images will not be OCRed. Instead, Snapshot will read text directly from the printer text stream and send that to Laserfiche. If you choose this option and the spacing or text locations do not appear correctly in Laserfiche, you can select the **Adjust text spacing** or **Adjust location information** boxes to correct for that on future print jobs.

If you choose **Perform OCR on the images created for the print job**, Snapshot will not collect the text from the text stream. Instead, once Snapshot has printed the TIFF images, Laserfiche will OCR them just as any other image would be OCRed.

Generally, obtaining text from the print job is faster and more accurate than performing an OCR. However, you may wish to perform OCR on the images if the print stream is encrypted or corrupted, or if it contains no information. For instance, some PDFs consist solely of images, and do not have a text stream. You may also prefer the formatting of OCRed text to formatting of text generated from the text stream.

Temporary files. Snapshot temporarily stores some files in the Windows temporary directory. You can click the **Delete files** button to delete these files immediately.

7.3. Snapshot Printer Properties

In the **LF Snapshot 7 Properties** dialog, you can configure print options such as paper size and orientation, image format, and watermarking, among others. This dialog can be accessed in a number of ways. From the **General** tab of the **Laserfiche Snapshot Configuration** dialog, you can click the **Settings** button. From the Laserfiche Client, you can click the **Properties** button in the **Snapshot** dialog. Additionally, most programs that have a print dialog will have a **Properties** or **Settings** button that will open this dialog.

In the **Device Settings** tab, you can specify the size and dimensions of the images that you will be printing. You can also determine the images' orientation and resolution. A number of default options for image size and resolution are available from the lists.

In the **File Formats** tab, you can specify the type of image that will be printed with Snapshot. You can choose the file format, determine whether you want to print in monochrome, grayscale or color, and set certain text options.

In the **Watermark** tab, you can choose to print a watermark image on each page of the document when it is printed by Snapshot.

In the **Embed Annotation** tab, you can configure an annotation to print on each page, which marks the pages with the combination of text, date and time that you want. You can also determine the place on the page that the annotation prints.

In the **Bates Numbering** tab, you can configure a number to apply to each printed page. You can set the starting number and the position of the number on the page.

In the **Profile Manager** tab, you can establish different sets of printer settings. For instance, you could set the paper orientation and color settings one way for printing certain kinds of files, and a different way for printing different files. Then you can quickly change the settings by switching between profiles.

7.4. Using Snapshot in the Client

You can use Snapshot within the Client to create TIFF images associated with electronic documents. (You cannot use Snapshot on Laserfiche documents, since Snapshot creates TIFF images and Laserfiche documents are already in TIFF image format.) Though the

electronic document file will still open in the native application, you can then open the document as pages and view the printed TIFF images and the generated text. Snapshot will also generate searchable text from the text stream of the document, if you cannot or do not want to use text extraction on the documents.

When using Snapshot in the Client, you will not see the **Laserfiche Snapshot Configuration** dialog. This is because most of the settings in the Configuration dialog are not applicable to printing within the Client. For instance, you do not need to select a template, since the pages will become part of the same document as the electronic file, which already has template settings of its own. For the same reason, you do not need to choose a document name or location, since the document you are printing with Snapshot already has a name and location. However, you can use the **Snapshot Printer Preferences** dialog to configure the way the images themselves print. See Section 7.3. Snapshot Printer Properties for more information. You can also choose to automatically index the documents as soon as they have been printed.

To use Snapshot in the Laserfiche Client

1. Select the document or documents you wish to Snapshot.

2. Right-click and select **Snapshot**.

3. The **Snapshot** dialog will open. If you wish to set the printer preferences, click the **Properties** button.

4. If you wish to index the document, select **Index (Make Text Searchable).** (If the repository is configured to automatically index new documents, this option will be selected and greyed out.)

5. When you have configured the settings to your liking, click **OK**.

7.5. Using Snapshot in Other Applications

You can use Snapshot directly from any application which has a Print option. This will print a TIFF image of the document and send it to your repository, where it will be imported as a new Laserfiche document. The new document is just like any other Laserfiche document.

Unless you have configured Snapshot to use default settings rather than prompt you for them, you will see the **Laserfiche Snapshot Configuration** dialog every time you print a document using Snapshot. This will allow you to customize the document name, location, template, and other information.

To use Snapshot in another application

1. Open the document you wish to print in the application.

2. Open the application's print dialog. (Usually there will be a Print button or a Print option in the File menu.)

3. In the printer selection option, select the **Laserfiche Snapshot 7** printer.

4. If you wish to configure the printer settings (such as paper size or color settings), open the **Snapshot Printer Preferences** dialog. This can usually be opened by clicking a Properties or Options button in the application's print dialog.

5. Once you have made any configuration changes you want, start the print.

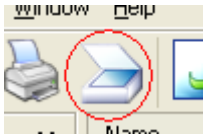
6. Once the image printing has finished, the **Laserfiche Snapshot Configuration** dialog will open.

7. Once you have made any changes to the configuration that you want, click **OK**. The document will be sent to the Laserfiche repository.

8. Scanning

Laserfiche Scanning allows users to convert paper documents into electronic images and then store those images in Laserfiche easily and quickly. Scanning is therefore a critical component of most Laserfiche installations, and it is important to know how to use it in order to make your document management process as efficient and useful as possible. Scanning provides a wide variety of options for processing documents as they are scanned; you can tailor your scanning procedure to meet your organization's needs. Using these options can make your documents easier to read, easier to categorize, and easier to locate in your Laserfiche repository later.

8.1. Getting Started with Laserfiche Scanning



1. In the Laserfiche Client, click the **Scan** button or select **Scan** from the **File** menu.

2. The **Laserfiche Scanning Mode** dialog box will open. Select either **Basic mode** or **Standard mode**. (For more information on the scanning modes, see Section 8.3. Choosing a Scanning Mode.)

3. Click **OK**. The Laserfiche Scanning window will appear in the selected mode.

8.2. How Does It Work?

Once Laserfiche Scanning is loaded, scanning into a Laserfiche repository is a four-step process, consisting of configuration, scanning, quality control, and storage. It is useful to consider these four steps when planning your scanning procedure.

> **Note**: This section provides a basic overview to scanning. More information on all of these steps is available in the rest of this chapter.

Configuration. The Configuration step has three parts: scanner setup, default properties, and image processing. The options available in scanner setup vary depending on your scan source and scanner type, but can include factors such as color settings, paper source, and paper size. Default properties include the document name, folder, volume, template, and field data that will be assigned to documents created during scanning. Image processing options include all actions that will be performed on the images after they have been scanned but before they are sent to Laserfiche – for instance, OCRing documents or cleaning them up with despeckle or line removal.

Scanning. When you are satisfied with your configuration, you are ready to start scanning. Images will be scanned and processed according to the selected configuration.

Quality Control. After they have been scanned, but before they are sent to Laserfiche, you can review your images. If you are not happy with an image, you can rescan it at this

point. Additionally, you can make sure that your images have been assigned to the appropriate documents, and make any necessary modifications to their properties.

Storage. When you are satisfied with the images and properties of your documents, store them in your Laserfiche repository. This creates the documents in the Laserfiche folder you specified. These new documents will contain the recently scanned images and the properties you set for them.

8.3. Choosing a Scanning Mode

The first choice you make as you begin to scan is the choice between basic and standard scanning modes. **Basic mode** requires minimal configuration, providing a few basic enhancements and the option to set default document properties or fill in properties for each document. It is ideal for beginning and intermediate users with relatively simple scanning needs, or for short scanning jobs by any user. **Standard mode** provides much more flexibility, with a broad variety of available enhancements and processes giving users full control over images. Standard mode is best for more advanced users.

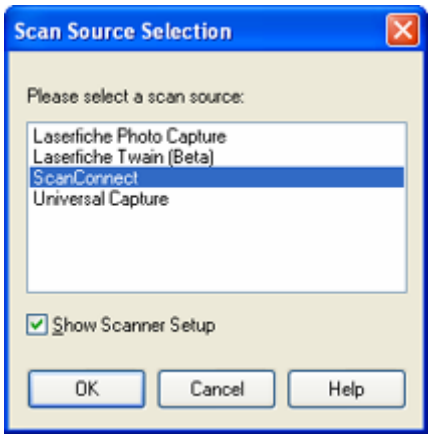
8.4. Scan Sources

The *scan source* is the interface between Laserfiche Scanning and your scanner. Five scan sources can be used with Laserfiche Scanning: Photo Capture, ScanConnect, Kofax, TWAIN, and Universal Capture.

- **Laserfiche Photo Capture:** Aquires images from a digital camera.
- **Laserfiche ScanConnect:** Retrieves images from a scanner that uses ISIS drivers.
- **Laserfiche Kofax:** Retrieves images from a scanner that supports Kofax.
- **Laserfiche TWAIN:** Retrieves images from a scanner that uses TWAIN drivers.
- **Universal Capture:** Acquires images directly from a local or network drive.

Note: Laserfiche ScanConnect must be purchased separately. Laserfiche Kofax will only be installed if your Kofax ACE or VRS card has been installed prior to installing Scanning. Photo Capture, TWAIN and Universal Capture are automatically installed with Laserfiche Scanning

To select a scan source



1. From the **Scan** menu, select **Scan Source Selection**. The **Scan Source Selection** dialog box will appear. This dialog also opens automatically the first time you use Laserfiche Scanning.

2. In the **Select a scan source** option, select the desired scan source.

3. Click **OK**.

8.5. Basic Scanning

Basic scanning requires minimal configuration and allows you start scanning quickly and easily. In Basic Mode, you create, modify and store one document at a time. The scanned images that will be assigned to the current document are displayed on the left side of the window, while document properties are displayed on the right. Basic mode also allows you to use OCR, rotate images, or perform basic enhancements on images.

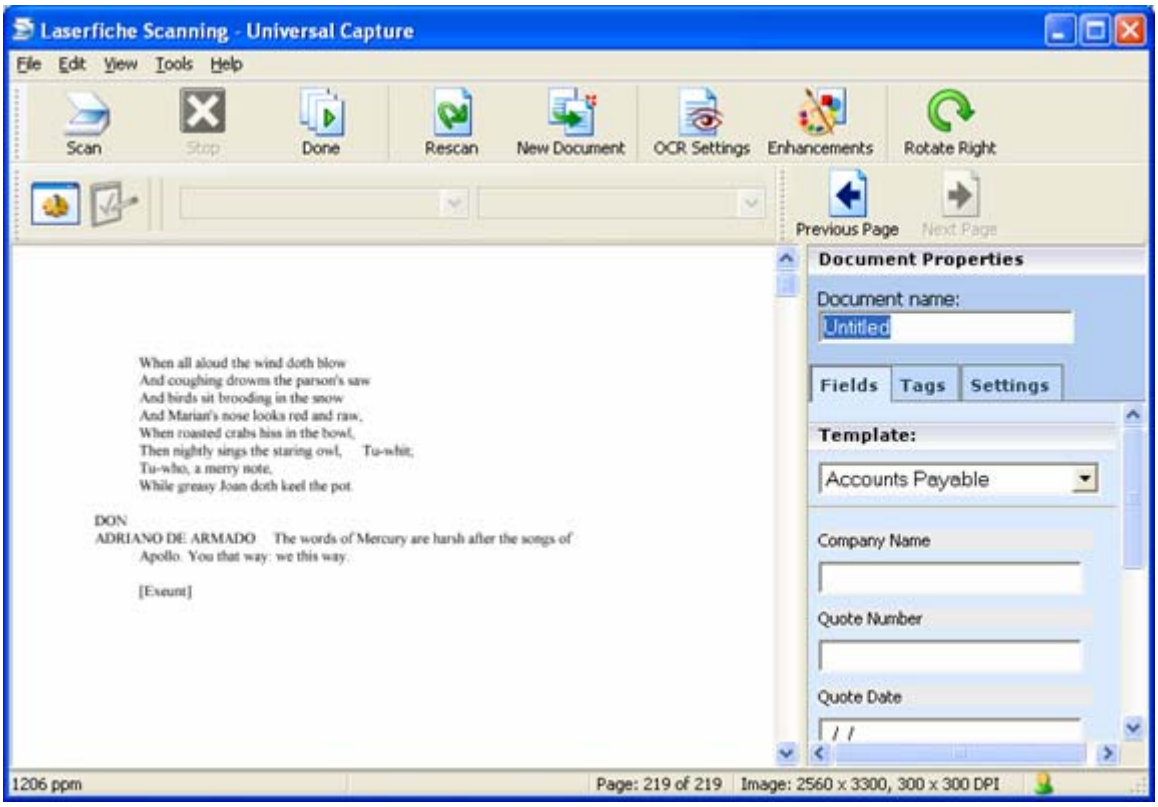


Figure 47: Basic Scanning mode.

8.5.1. Basic Scanning Quick Start

1. In the Laserfiche Client, navigate to the folder you wish to scan into.

2. Open Laserfiche Scanning from the Client.

3. Select your scanning mode. In this case, select Basic.

4. Select your scan source and configure your scanner. Scanner configurations differ from scanner model to scanner model; check your scanner documentation for more information.

5. In the **Document Properties** pane, you can view or modify the document's name, template fields, tags, and other settings. For more information, see Section 8.5.2. Default Properties.

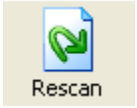
6. When you are happy with your default properties, you can determine whether the document should be OCRed by clicking the **OCR Settings** button. For more information, see Section 8.5.3.1 OCR Settings.

7. If you wish to configure any image enhancements, you can do so by clicking the **Enhancements** button. For more information, see Section 8.5.3.2. Enhancements.

8. You are now ready to scan. Click the **Scan** button to begin.

9. Once your document has been scanned, you can check the pages using the **Previous Page** and **Next Page** buttons. If any pages are incorrectly oriented, you can rotate them using the **Rotate Image** command from the **Edit** menu. You can also remove pages by selecting **Delete Page** from the **Edit** menu.

10. If you are not happy with the scan of a page, you can rescan the page before storing it in the repository. Navigate to the page you wish to rescan. Place the page in the scanner again and click the **Rescan** button.



11. When you are happy with the document, click the **Done** button to send it to Laserfiche. At this point, you can scan another document, or close Scanning.

8.5.2. Default Properties

8.5.2.1. Document Name

Laserfiche Scanning will suggest the default name defined in the Autoname dialog in the Laserfiche Client; see Section 5.2.4. Autonaming for more information. You may choose a different name for those documents created in the current scan session. You can also dynamically create document names using tokens. For more information, see Section 10. Appendix: Tokens.

The name for the document you are creating is set in the **Document Properties** pane, under **Document Name**. Simply type the name for the document, including any tokens you are using.

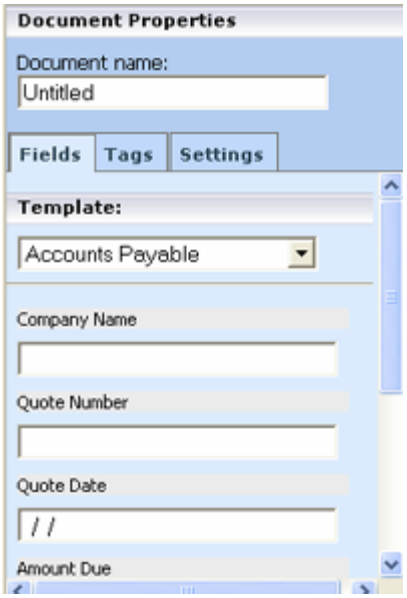


Figure 48: The Fields tab of the Document Properties dialog in Basic mode.

8.5.2.2. Fields

In the **Fields** tab of the **Document Properties** pane, you can set the template field information for the current document. If any fields have default values, those values will be pre-populated in the fields. If any fields have invalid data, the document cannot be sent to the Laserfiche repository. Therefore, fields with invalid data are flagged by a white exclamation point in a red circle. If you hover your cursor over this mark, a tooltip will pop up explaining why the data is invalid. For instance, if a required field has been left blank, the invalid data mark will be shown until it has been filled in. If a field has a constraint which has not been me, the mark will be shown until the data has been corrected to fit the constraint.

8.5.2.3. Tags

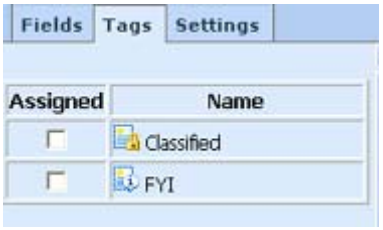


Figure 49: The Tags tab of the Document Properties dialog in Basic mode.

If a document should be marked with an informational or security tag, the tag can be applied in the **Tags** tab of the **Document Properties** pane. Select the tags you wish to apply. Note that you will only be able to apply tags that have been assigned to you.

8.5.2.4. Settings

In the **Settings** tab of the **Document Properties** pane, you can select which volume you wish to scan into. If you check the **Validate Document Name** box, Laserfiche will notify you if you attempt to store a document in a folder

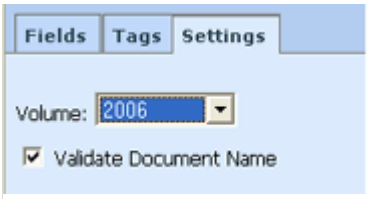


Figure 50: The Settings tab of the Document Properties dialog in Basic mode.

which already contains a document with the same name. You will be given the opportunity to change the document's name and re-send it.

8.5.3. Options

8.5.3.1. OCR Settings

Figure 51: The OCR Settings dialog.

You can configure Scanning to automatically OCR all newly-scanned documents. This will ensure that your new documents are full-text searchable as soon as they enter the repository. To enable OCR, either select **OCR Settings** from the **Tools** menu, or click the **OCR Settings** button in the Scanning toolbar. This will open the **OCR Settings** dialog.

To automatically OCR new images, select the **Perform OCR on new images** check box. You can then select your OCR language, and choose whether or not to decolumnize text.

8.5.3.2. Enhancements

To produce a cleaner image and/or to improve OCR accuracy, you can enhance scanned images. These enhancements affect all documents scanned after the enhancements were configured. The four types of enhancements that can be performed in Basic mode are described below.

> **Tip**: More image enhancement types are available in Standard scanning mode.

- **Deskew:** This image enhancement straightens images that have been scanned at an angle. Typically, crooked images occur when paper is fed at a slight angle in the feeder or if the paper is not positioned correctly on the flatbed.

- **Despeckle:** This image enhancement removes stray marks on your images. These stray marks generally look like small dots, specks or 'noise' on your scanned image. The size of the dots that will be removed can be configured so that you don't accidentally remove periods, apostrophes, or other characters that belong on the image.

- **Rotate:** This image enhancement rotates your scanned images. This process can be performed automatically or images can be rotated by a certain amount. Automatic rotation will detect the correct orientation of your images and then rotate your scanned images to match that orientation. Manual rotation will rotate all scanned images clockwise by a set degree (i.e. 90, 180, and 270).

- **Line removal:** This image enhancement will remove horizontal lines, vertical lines, or both from your scanned images. Typically, you will only want to perform

line removal to improve OCR accuracy. For this reason, you may choose to discard the changes performed by this image enhancement after OCR processing. In other words, you can determine whether the image stored in Laserfiche will retain its horizontal or vertical lines.

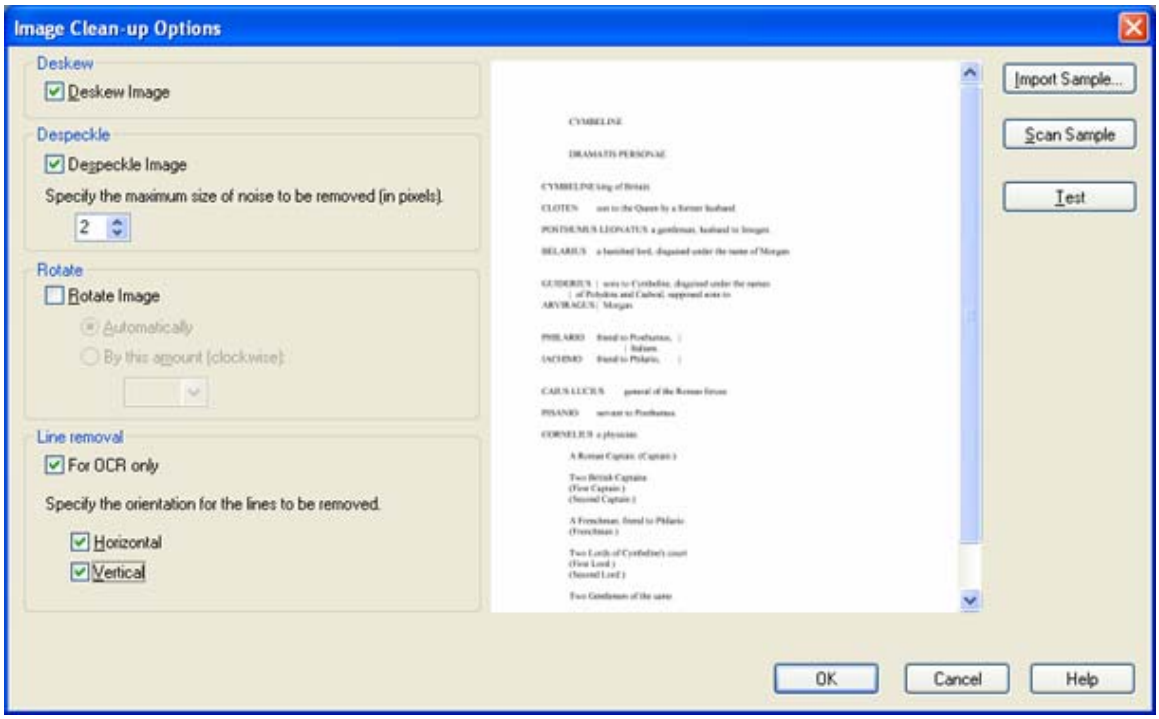


Figure 52: The Image Clean-Up Options dialog in Basic mode.

To configure image enhancements

1. From Laserfiche Scanning, select **Enhancements** from the **Tools** menu. The **Image Clean-Up Options** dialog box will appear.

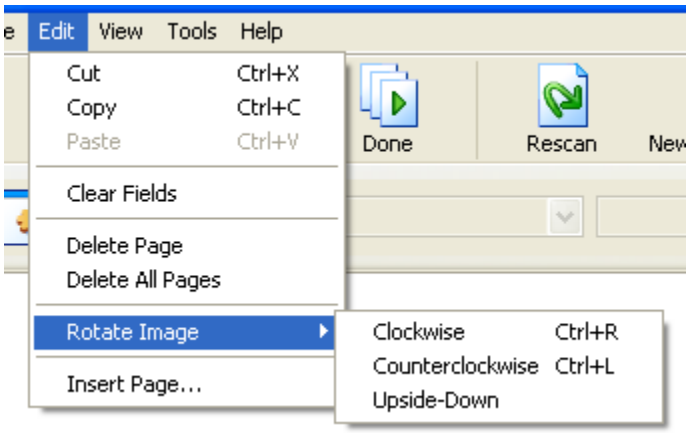
2. Select the image enhancements that you would like to perform on your scanned images.

3. If you would like to preview how image enhancements will affect your scanned images, click **Import Sample** or **Scan Sample** to acquire an image. After you have imported or scanned the desired image, it will appear to the right of the image enhancement options. Click **Test** to preview how the current configuration will affect the selected image.

4. Click **OK**.

8.5.3.3. Rotate Image

In addition to the **Rotate** image enhancement, which rotates all pages in a document, you have the option to chose **Rotate Image** from the **Edit** menu. This will rotate only the page you have selected. It is therefore useful if only a small number of pages in a document need to be reoriented. Select **Rotate Image** and choose either **Clockwise** or **Counterclockwise** (each of which rotates the image ninety degrees in the selected direction), or **Upside-Down**.



8.6. Standard Scanning

Standard scanning mode provides more features and flexibility than basic scanning mode. It allows you to process your images using a wide variety of image enhancements, and to configure exactly how your images will be processed. This allows you to fine-tune the enhancement of your images and OCR processing to produce results that are optimized for the type of images that you are scanning. This mode also allows you to configure default document properties, which will be applied to newly scanned documents. Finally, this mode allows you to work more efficiently by allowing you to scan more than one document at a time. After Laserfiche Scanning has been configured, you can quickly scan as many Laserfiche documents as desired.

The Standard mode interface has five components: the configuration pane, the revision pane, the text pane, the task pane, and the output pane. You can choose to view any combination of these panes, or to hide panes that you do not want to see, by clicking the pane icon in the toolbar.

The configuration pane allows you to view your document settings and view and add image processing options. The revision pane lists the documents which have been scanned, and allows you to quickly create new documents or move or remove individual pages. The text pane displays any text OCRed from the scanned document. The properties associated with the currently selected document can be found in the task pane, which appears by default on the right-hand side of the window. If you are configuring an image processing operation, the options for that process will be displayed in the task pane as well. The output pane provides an area where you may view processing and error messages.

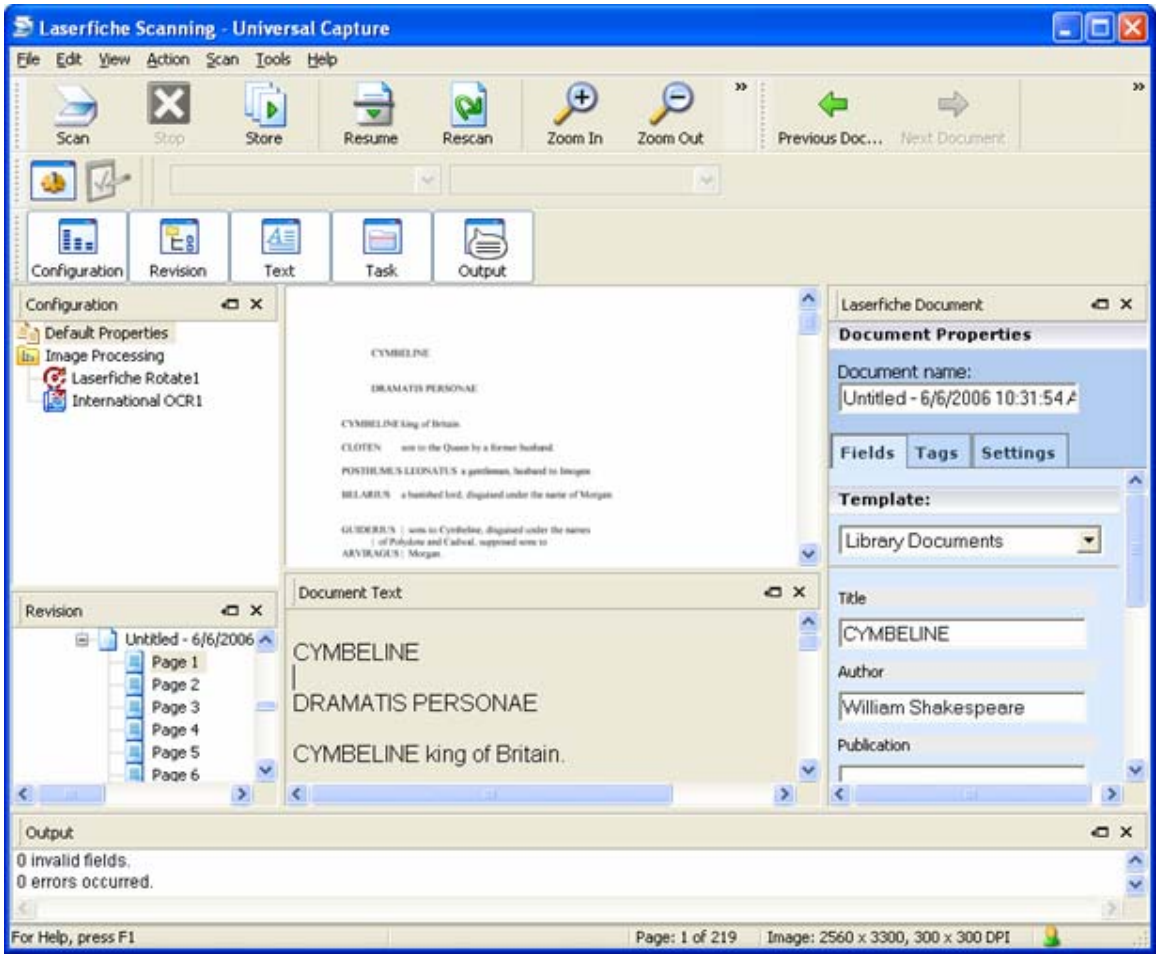


Figure 53: Standard Scanning mode.

8.6.1. Standard Scanning Quick Start

1. Open Laserfiche Scanning from the Client.

2. Select your scanning mode. In this case, select Standard.

3. Select your scan source and configure your scanner. Scanner configurations differ from scanner model to scanner model; check your scanner documentation for more information.

4. In the configuration pane, select **Default Properties**. This will open the **Document Properties** dialog in the task pane.

5. View or modify the default document name, template fields, tags, and other settings. These settings will be applied to all documents in this session, although you can modify the information for individual documents later. For more

information, see Section 8.6.2 Default Properties.

6. When you are happy with your default properties, select **Image Processing** in the configuration pane. This will open the **Image Processing** list.

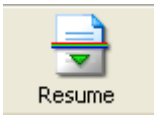
7. Select and configure the image processes you wish to use for this scanning session. Note that OCR is an image process; to OCR the document, you will need to select the **International OCR** process. For more information on image processing options, see Section 8.6.3. Image Processing.

8. You are now ready to scan. Click the **Scan** button to begin. If you have multiple documents to scan, you can repeat this step until all documents have been scanned.

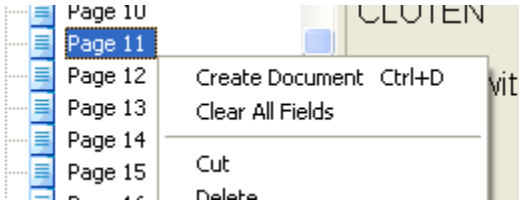
9. If you opted to send documents immediately, the documents will be sent to your repository as soon as they have been scanned. (See Section 8.6.2.4. Settings for information on sending options.) If not, you can review the document or documents in the revision pane. See Steps 10-15 for information on reviewing and sending documents.

10. If any pages are incorrectly oriented, you can select them in the revision pane and rotate them using the **Rotate Image** command from the **Edit** menu. You can also remove pages by selecting **Delete Page** from the **Edit** menu.

11. If you would like to scan more documents but add them to the existing document rather than creating a new document, click the **Resume Scanning** button on the toolbar.



12. You can break a single document into multiple documents in the revision pane. Select the page which should be the first page of the next document. Right-click and select **Create Document**.

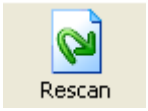


13. You can customize the document properties for individual documents before sending them to the repository. Select the document in the revision pane. The document's properties will appear in the task pane. Make any necessary changes to the document's name, fields or tags. You can also change the volume in which the pages will be stored.

Tip: If you have OCRed the images, you can select text from the text pane and drag it into the template field directly. In this way, you can quickly fill template

fields with information such as the title or author of the document. This will not remove the text from the text pane; it will simply copy it.

14. If you are not happy with the scan of a page, you can rescan the page before storing it in the repository. Navigate to the page you wish to rescan. Place the page in the scanner again and click the **Rescan** button.



15. When you are happy with the document, click the **Send** button to send it to Laserfiche. At this point, you can scan another document or close Scanning.

8.6.2. Default Properties

The options you set in the Default Properties pane will be applied to all documents. You will be able to modify the values for a specific document once that document has been scanned by selecting the document in the Revision pane.

8.6.2.1. Document Name

Laserfiche Scanning will suggest the default name defined in the Autoname dialog in the Laserfiche Client; see Section 5.2.4. Autonaming for more information. You may choose a different name for those documents created in the current scan session. You can also dynamically create document names using tokens. For more information, see Section 10. Appendix: Tokens.

The name for the document you are creating is set in the **Document Properties** pane, under **Default document name**. Simply type the name for the document, including any tokens you are using.

8.6.2.2. Fields

In the **Fields** tab of the **Document Properties** pane, you can set the template field information for the current document. If any fields have default values, those values will be pre-populated in the fields. If any fields have invalid data, the document cannot be sent to the Laserfiche repository. Fields with invalid data are flagged by a white exclamation point in a red circle. If you hover your cursor over this mark, a tooltip will pop up explaining why the data is invalid. For instance, if a required field has been left blank, the invalid data mark will be shown until it has been filled in. If a field has a constraint which has not been met, the mark will be shown until the data has been corrected to fit the constraint.

Figure 54: The Fields tab of the Document Properties dialog in Standard mode.

8.6.2.3. Tags

Figure 55: The Tags tab of the Document Properties dialog in Standard mode.

If a document should be marked with an informational or security tag, the tag can be applied in the **Tags** tab of the **Document Properties** pane. Select the tags you wish to apply. Note that you will only be able to apply tags that have been assigned to you.

8.6.2.4. Settings

In the **Settings** tab of the **Document Properties** pane, you can configure several document handling options.

Default Volume. Select which volume you wish to scan into.

Default Folder. Select which folder in the repository you wish to scan into. By default, the folder you had open when you launched Scanning will be used. You can browse by clicking **Browse for a location**. You can either choose an existing Laserfiche folder or you can create a new one. If you want to create a new folder, you can either type the path to the new folder or you can use tokens to create the new folder. For more information about tokens, see Section 10. Appendix: Tokens.

Document Length. By default, the length for scanned documents is determined by the number of pages scanned at a single time. In other words, a new document will be created whenever you start processing; if you process one set of pages, then stop, then process another, they will be created as two documents. In this option, you can choose to create documents with a specified maximum number of pages, regardless of how many pages have been scanned at one time. For instance, if you set the document length to five pages and then scanned twelve pages at once, three documents would be created: two of five pages, and one of two pages.

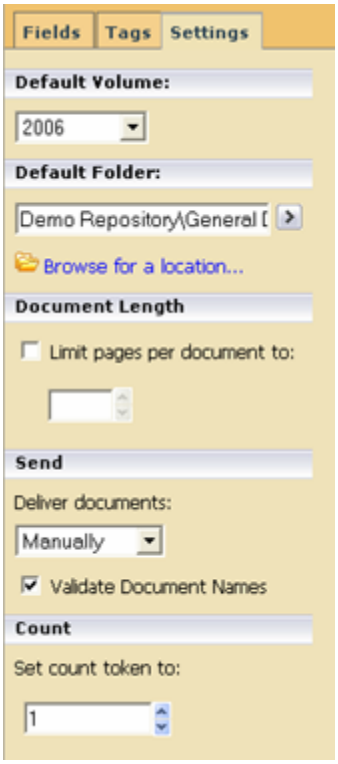


Figure 56: The Settings tab of the Document Properties dialog in Standard mode.

Send. You can choose to deliver documents manually or immediately. If you choose to send them manually, documents will only be sent to the repository when you click the **Store** button. You should choose this option if you wish to review or modify the documents after they have been scanned. If you choose to send them automatically, documents will be sent to the repository immediately upon being scanned. This option is useful if you wish to quickly scan and store a large number of documents, and if you do not need to modify them before sending them to the repository. If you check the **Validate Document Name** box, Laserfiche will notify you if you attempt to store a

document in a folder which already contains a document with the same name. You will be given the opportunity to change the document's name and re-send it.

Count. If you are using the $count$ token in your document's name, folder location or fields, you can use this option to change the starting value of the counter. For more information, see Section 10. Appendix: Tokens.

8.6.3. Image Processing

Laserfiche Scanning's Standard mode offers a wide variety of image processing processes and configurations. For instance, if you use a slipsheet on your documents, you can use Page Removal to automatically remove the first page of a document. If you are scanning documents with 'noise' on the page, you can configure your Scanning session to automatically despeckle and smooth images before they are OCRed.

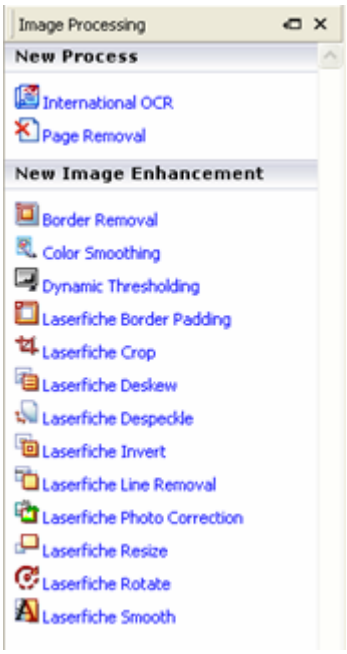


Figure 57: The Standard mode image processing options.

To add image processing operations to your scanning session, select **Image Processing** from the configuration pane. This will open the list of image processing operations in the task pane. To add an operation, select it from the list. The task pane will switch to display the configuration options for that process. Once you have configured the process, you can test it on the sample image by clicking **Test Image Enhancement** at the bottom of the task pane.

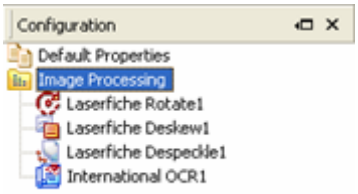


Figure 58: The Configuration pane.

You can re-order your image processing operations by selecting one in the configuration pane and dragging it to a new position in the list. If you no longer wish to use an operation, you can delete it.

In Standard mode, OCR is considered an image processing option. If you wish to OCR documents before storing them in your repository, you will need to add an **International OCR** process. Generally, it is best to perform an OCR last, as it will then benefit from any other image clean-up processes you might run.

For a complete list of image processes, and information on how to configure them, see the "Determining How Images are Processed" section of the Laserfiche Scanning help file.

8.7. Other Options

8.7.1. Scanning into an Existing Document

You can scan new pages into an existing Laserfiche document – for instance, to amend a document with new information, or to add a missing title page to the beginning of a document. As with normal scanning, you can use either Basic or Standard mode. You can modify template fields and tags normally, and can configure image processing settings, but all other document properties are read-only. You will not be able to change the document name or volume from the scanning interface, for instance.

To scan images into an existing document

1. In the Laserfiche Client, open the document into which you wish to scan.

2. From the **File** menu, select **Scan**. The Insert New Pages dialog box will appear.

3. Specify whether newly scanned pages should be inserted at the beginning, at the end, or after a specific page in the currently opened document.

4. Click **OK**. Laserfiche Scanning will open and run as normal.

5. After you are finished scanning images, store them in the existing document by clicking **Store Documents** from the toolbar.

9. Appendix: Passwords and Authentication

There are two ways to log in to a Laserfiche repository: using a Laserfiche user name and password, or using Windows Authentication. If you are using Windows Authentication, Laserfiche will use your Windows domain name to authenticate you and grant you access. Simply select the **Use Windows Authentication** box when you log in. If you are not using Windows Authentication, you will need to input a user name and password.

If you need to change your password, you can do so from the **Options** menu. In the **Tools** menu, select **Options** and then **Password**. You will need to enter your old password, and then enter your new password twice.

If your administrator has set up a password policy, your password may need to meet certain restrictions. For instance, you might need a password of at least four characters, not containing the user name. If this is the case, and your password does not meet the criteria, you will be notified of the password policy criteria your password is not meeting. For more information on the password policy in place in your Laserfiche installation, talk to your Laserfiche administrator.

10. Appendix: Tokens

Tokens offer a way to automatically populate template fields, name documents, and create or specify folders in the Laserfiche folder structure where documents will be filed. Tokens represent information that Laserfiche can automatically fill in for you. For example, the token "$Date$" represents the current date. You can enter this token in a field, and Laserfiche will replace the token with the current date according to your computer's date and time settings. Using tokens in this manner becomes especially powerful when they are set as default values – if a Date field's default value is "$Date$," then new documents with this template will automatically have the current date filled in.

Most tokens are straightforward, consisting of a simple word with $ symbols on either side. Here is a list of the tokens that you can use in Laserfiche and Scanning:

Name	Symbol	Applies To	Description
Count	$Count$	Laserfiche Client and Scanning	The count token is a sequential number. By default, this token starts at 0. It can be configured from the Autoname options dialog and the Laserfiche Scanning task pane.
Date	$Date$	Laserfiche Client and Scanning	The date token is replaced by the system date from the current workstation.
ID	ID	Laserfiche Client and Scanning	A token that represents the identification number assigned to the Laserfiche document where data will be stored. This identification number will be generated when the Laserfiche document is created. Unlike most tokens, this token is replaced when the document is stored in Laserfiche. Until then, the token will appear at the insertion point.
Field Data	$[*Field*]$	Scanning	A token that represents the value assigned to a field in the current document. The format for this type of token is a dollar sign, left bracket, the name of the desired field, right bracket, and then a dollar sign. The specified field must belong to the template that will be assigned to scanned documents. Unlike most tokens, this token is replaced when the document is stored in Laserfiche. Until then, the token will appear where it was inserted.

Field Data Inheritance	$Parent$ $Parent:*Field*$	Laserfiche Client and Scanning	The parent token allows a document or folder to inherit a field value from the folder in which it resides. If this token is set in a document or folder's template field, then field data will be inherited from the folder in which the document or folder will be created. Once a document or folder inherits a field value, the parent token will be replaced with the value assigned to a field in the parent folder. **Note:** Keep in mind that a token will only be replaced once. The parent token cannot maintain field data synchronization between a folder and its children. The $Parent$ token inherits the value assigned to the field with the same name in the parent folder. For example, if you insert the $Parent$ token in a field called "Name," then it will be replaced by the value assigned to the "Name" field in the parent folder. If the parent folder has not been associated with a field called "Name," then the child document's field will be blank. If you would like to inherit the value assigned to a field with a different name, then you should use the $Parent:*Field*$ token. The term *Field* should be replaced with the name of the desired field associated with the parent folder. If the parent folder has not been associated with a field with the specified name, then the token will not be replaced.
Name	$Name$	Laserfiche Client and Scanning	The name token is replaced by the file name for the scanned or imported image. This token is available for use with Laserfiche Universal Capture.

Path	$Path$	Scanning	The path token is replaced by the path to the file for the image that was scanned. This token is available for use with Laserfiche Universal Capture.
Time	$Time$	Laserfiche Client and Scanning	The time token is replaced by the system time on the current workstation.
User	$User$	Laserfiche Client and Scanning	A token that represents the name of the Laserfiche user through which documents were sent to a Laserfiche repository. Unlike most tokens, this token is replaced when the document is stored in Laserfiche. Until then, the token will appear where it was inserted.

11. Appendix: Keyboard Shortcuts

For many users, keyboard shortcuts – once learned – are a much faster way of navigating and performing operations in Laserfiche than pointing and clicking with a mouse. This section offers an overview of the keyboard shortcuts available in Laserfiche.

Note: Not all shortcut keys are specific to Laserfiche. Some are general Windows system commands that may improve your overall efficiency.

Shortcut Key	**Function**
System Commands	
CTRL+ALT+(key)	In Windows, you can assign a hotkey to any shortcut icon, whether it points to an application or file. Simply right-click on the shortcut icon, and select **Properties**. In this dialog, there is a text field titled **Shortcut key**: Type any character key into this field (like the L key), and the new hotkey sequence will appear in this field (for instance, CTRL + ALT + L). After this, holding down CTRL+ALT and pressing this key will launch the file or application pointed to by the shortcut.
ALT+F4	Windows standard for "Exit." This closes the active application. If no application is active, it prompts the user to shut down the computer.
ALT+TAB	Brings up a list of icons for all running applications. Holding down the ALT key and repeatedly pressing TAB allows you to bring any running application to the front. ALT+SHIFT+TAB goes backwards through the list.
ALT+SPACE	Opens the **System** menu for the running application. This is equivalent to clicking the icon in the upper left-hand corner of an application's frame. This menu has items like **Minimize**, **Maximize**, **Restore**, and **Close**. Each has a hotkey assigned to it, so, for instance, the sequence ALT+SPACE, N will minimize the current application.
WINDOWS+D	Minimizes *all* windows, leaving the Windows desktop unobstructed. (Hold down the key that has the Windows icon, then press the D key.)
WINDOWS+R	Opens the **Run** dialog. This is the same as selecting **Run...** from the start menu. From here, you can access system utilities. For example, typing "regedit" and hitting ENTER will run RegEdit to allow you to modify the registry.

WINDOWS+E:	Starts the Windows Explorer, opened to "My Computer".
WINDOWS+F	"Windows Find"... opens Windows Explorer with the Search Pane visible on the left instead of the Folder Tree.
WINDOWS+L	Locks your workstation. Current user's password is then needed to access it.

Application Commands

F1	Windows standard for **Help**; in Laserfiche, this opens the Laserfiche Help file.
F2	Windows standard for **Rename**; in Laserfiche, this allows you to rename the selected document, shortcut or folder.
F3	Windows standard for **Find** or **Find Next**. In the Laserfiche Folder Browser, F3 will toggle (show or hide) the Search pane.
CTRL+F	Windows standard for **Find** or **Search**. In the Laserfiche folder browser, CTRL+F will toggle (show or hide) the Search pane. In the Laserfiche document viewer, CTRL+F will open a standard **Find** dialog for the text pane, if the text pane is visible. If text is selected when you press CTRL+F, this text appears in the **Find** dialog.
CTRL+B	In the Laserfiche folder browser, CTRL+B will toggle (show or hide) the folder tree.
F4	If focus is on a drop-down list (like the Template selection list at the top of the Template View pane), this will expand the list. This is Windows standard, and works in Laserfiche.
F5	This is Windows standard for **Refresh**. In the Laserfiche folder browser, this gets the most recent list of documents and folders from the server. In the document viewer, it gets the latest version of the document from the server.
TAB	This is Windows standard for **Next Item**. It moves focus to the next item in a dialog box or other interface window.
SHIFT+TAB	This moves backwards through the "tab order."
F6	In Laserfiche, this sets focus on the next view in the Document Viewer. Whereas clicking TAB will hit every field in the Template View and the **Undock** buttons in the views' title bars, F6 moves focus immediately from one visible view to the next.

ALT+ENTER	Windows standard for **Properties**. Works similarly in Laserfiche, although, unlike Windows, it will not open up multiple dialogs if multiple items are selected.
CTRL+A	Windows standard for **Select All**, and works in the folder list, the Thumbnail view, and the Text view.
Laserfiche Commands	
CTRL+N	New Folder
CTRL+D	New Document (either creates a blank document in the folder browser, or creates a new document from the selected pages in the document viewer).
CTRL+SHIFT+B	New Folder Browser window
CTRL+T	Toggles title bars in the Document Viewer.
CTRL+1	Show/hide **Image** view
CTRL+2	Show/hide **Text** view
CTRL+3	Show/hide **Metadata** view
CTRL+4	Show/hide **Thumbnail** view
CTRL+5	Switch to the **Fields** tab of the Metadata view
CTRL+6	Switch to the **Tags** tab of the Metadata view
CTRL+7	Switch to the **Links** tab of the Metadata view
CTRL+8	Switch to the **Versions** tab of the Metadata view
CTRL+SHIFT+H	Activate **Highlighting** tool (text and image)
CTRL+SHIFT+R	Activate **Redaction** tool (text and image)
CTRL+SHIFT+N	Activate **Sticky Note** tool (image)
CTRL+SHIFT+S	Activate **Stamp** tool (image; shows Stamp Selection dialog)
CTRL+SHIFT+C	Display **Recent Stamps** menu (image)
CTRL+SHIFT+P	Activate **Panning** tool (image)
CTRL+SHIFT+Z	Activate **Zooming** tool (image)
CTRL+SHIFT+T	Activate **Text Editing** tool

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