

Laserfiche 8

User Quick Start

Welcome to Laserfiche

Laserfiche is a Windows application allowing you to store, organize, and access your organization's information. You have complete control over what type of information is stored, how long it is kept, and who can view the information. Laserfiche also allows you to create, modify, and delete content.

The screenshot displays the Laserfiche application interface. At the top, a red banner reads "Laserfiche®". Below it, a window titled "Available Repositories" shows a list of repositories: "MyLaserficheRepository" (selected) and "OtherRepository". Below the list are three buttons: "OPEN", "ATTACH", and "REFRESH".

The main window shows a file list with columns for Name, Size, Type, and Date. The list includes folders like "194856 Financial Records (Corporate)", "194859 Human Resources", and "General Documents", as well as files like "1 Laserfiche Product Brochures", "2 Laserfiche Product News", "3 Laserfiche Press Clippings", "4 Interesting Articles", "5 William Shakespeare", "6 Electronic Documents", "test", "Recycle Bin", and "INHOUSE".

Below the file list, a document preview is shown. The preview displays text about the Luminary award, Ms. Wacker's achievements, and the Create Your Dreams Gala. The text is as follows:

The Luminary honors working mothers who have achieved greatness in their field. Given by the The Morris in Business Network™, the award is intended to inspire other women who balance both career and motherhood.

The gala event and ceremony was held May 7, 2005, at the Vynn Resort in Las Vegas.

In acknowledging the award, Nien-Ling Wacker said, "It is such an honor to be named Luminary of the Year by my peers - other women who have made a difference in the board room and in the home. This distinction comes at a wonderful point in my career. It is a true testament to Laserfiche's employees, my mentors, friends, and family who provided the support to achieve such an honor."

Ms. Wacker founded the certified minority business, Compulink Management Center, Inc., in 1974. Her success with the award-winning Laserfiche document management software is the culmination of nearly three decades of work with computer systems, information management and office automation. The company has more than 22,000 clients worldwide.

In 2001, Ms. Wacker won the Association for Information and Image Management's Pioneer Award, which described her as a "visionary" and cited Laserfiche as "consistently among the leaders in developing solutions to international challenges."

Ms. Wacker's accomplishments have been chronicled in The Wall Street Journal, the Los Angeles Times and other major newspapers and industry publications. The Los Angeles Times described her integration of document imaging and full-text retrieval as "a big step closer to the paperless office."

Ms. Wacker was born in China and educated in Hong Kong, Australia and the United States. She is the mother of two sons.

The Create Your Dreams Gala™, hosted by Morris in Business Network and the International Association of Working Mothers™, is the only national award honoring the outstanding achievements of working mothers who are leaders in business, arts and the community.

At the bottom right, a "Metadata" window is open, showing a "Template: Press Articles" and a list of fields: "Author" (Laserfiche), "Title", "Date", "Location", "Category", "Keywords", "Comments", "Links", "Versions".

The status bar at the bottom indicates "etrenton (ADMIN) 0 of 2 pages selected Page 1 of 2".

Laserfiche Concepts

**Repository:**

A repository is a place where your files are stored. It contains your documents, organized within folders, and additional information about those documents and folders.

**Folder:**

Folders aid the organization of your documents. They can contain imaged documents, electronic documents, shortcuts, and other folders.

**Imaged Document:**

When you create a document by scanning or importing pages into the repository, you create an imaged document.

**Electronic Document:**

An electronic document is a document that contains an electronic file, such as a Word document or PDF. Electronic documents can contain searchable text and metadata, and they open in their native applications through Laserfiche.

**Document:**

Laserfiche uses the term “document” to refer to an imaged document or an electronic document.

**Fields:**

Fields contain additional information about the document that you can use for reference or search and retrieval.

**Template:**

A collection of fields that can help categorize documents or folders.

**Metadata:**

Metadata is a general term used to refer to information associated with a document. Metadata consists of field data, tags, version information, and linked documents.

**Volume:**

Volumes reflect the way the Laserfiche Server organizes and manages files. When you create or import a document, you will specify the volume it will be stored in.

**Briefcase:**

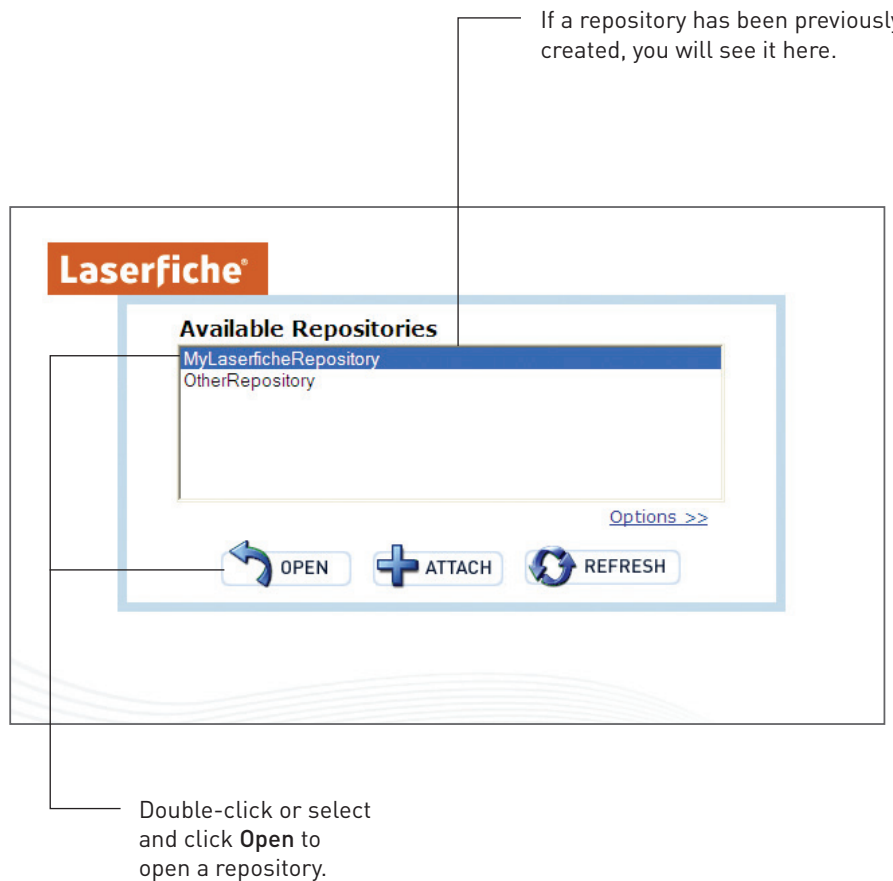
A briefcase is a single file that contains exported Laserfiche documents and folders. Documents will retain metadata, images, text, electronic files, and annotations.



Indicates new features in Laserfiche 8.

Getting Started

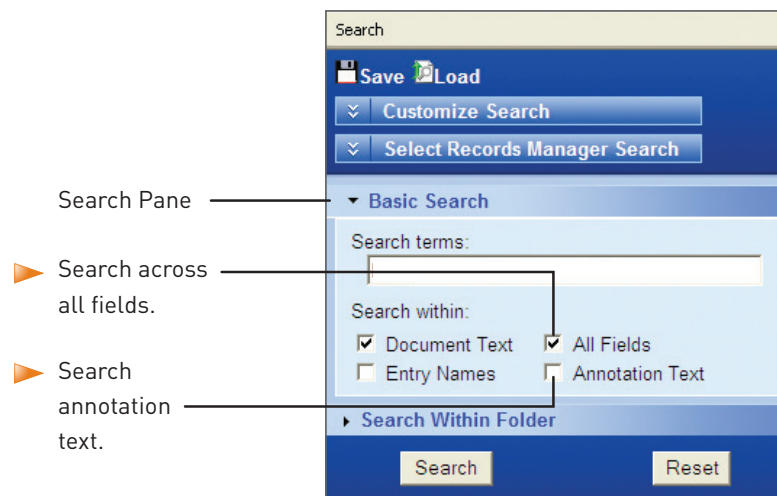
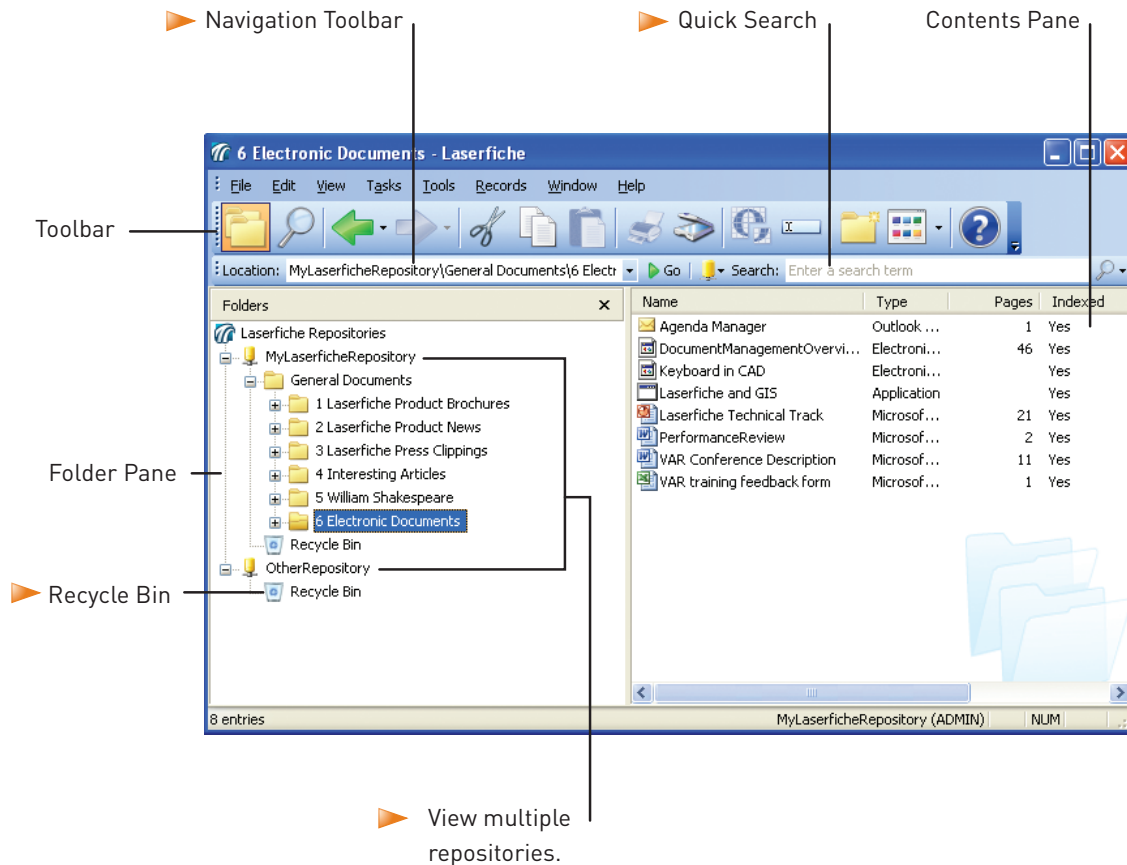
To view information stored in Laserfiche, you will need to open a Laserfiche repository. If a repository has already been created, it will be displayed on this Laserfiche Start Page. If you do not see a repository, contact your administrator for help creating or connecting to a repository.



■ For more information, see **Getting Started** in the Laserfiche Client help files.

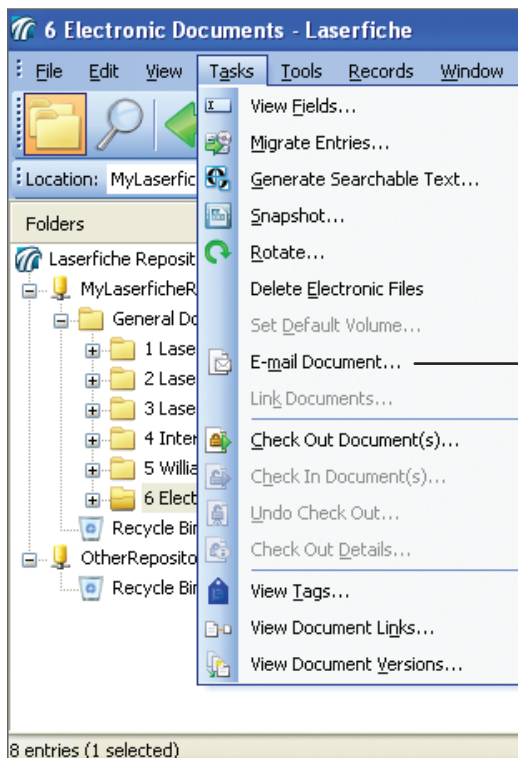
Folder Browser

The Folder Browser is the main workspace where you can work with and find your organization's information. The primary visual aspects in the Folder Browser are the toolbar and the panes.



Double-click a document icon to open the file.

Name	Type	Pages	Template Name
A letter from the Smithsonian	Document	2	General
Agenda Manager	Outlook Item	1	e-Mail
Declaration of Independence	Document	4	General (2)
DocumentManagementOvervi...	Adobe Acrobat 7.0 Document	46	Brochures
Emancipation Proclamation	Document	1	e-Mail
Keyboard in CAD	Electronic Document		General (2)
Laserfiche and GIS	Application		General (2)
Laserfiche Technical Track	Microsoft Office PowerPoint 97-2003 Presentation	21	General (2)
NASA Shuttle Launch	Document	1	Library Documents
PerformanceReview	Microsoft Office Word 97 - 2003 Document	2	General (2)
The Gettysburg Address	Document	1	Press Articles
VAR Conference Description	Microsoft Office Word 97 - 2003 Document	11	General (2)
VAR training feedback form	Microsoft Office Excel 97-2003 Worksheet	1	General (2)

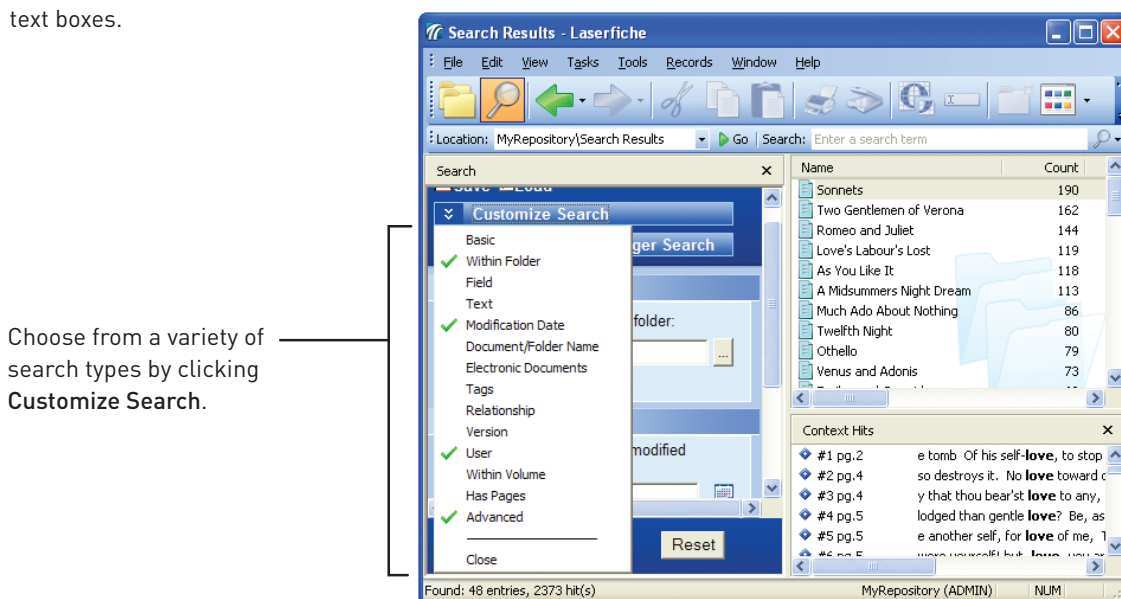
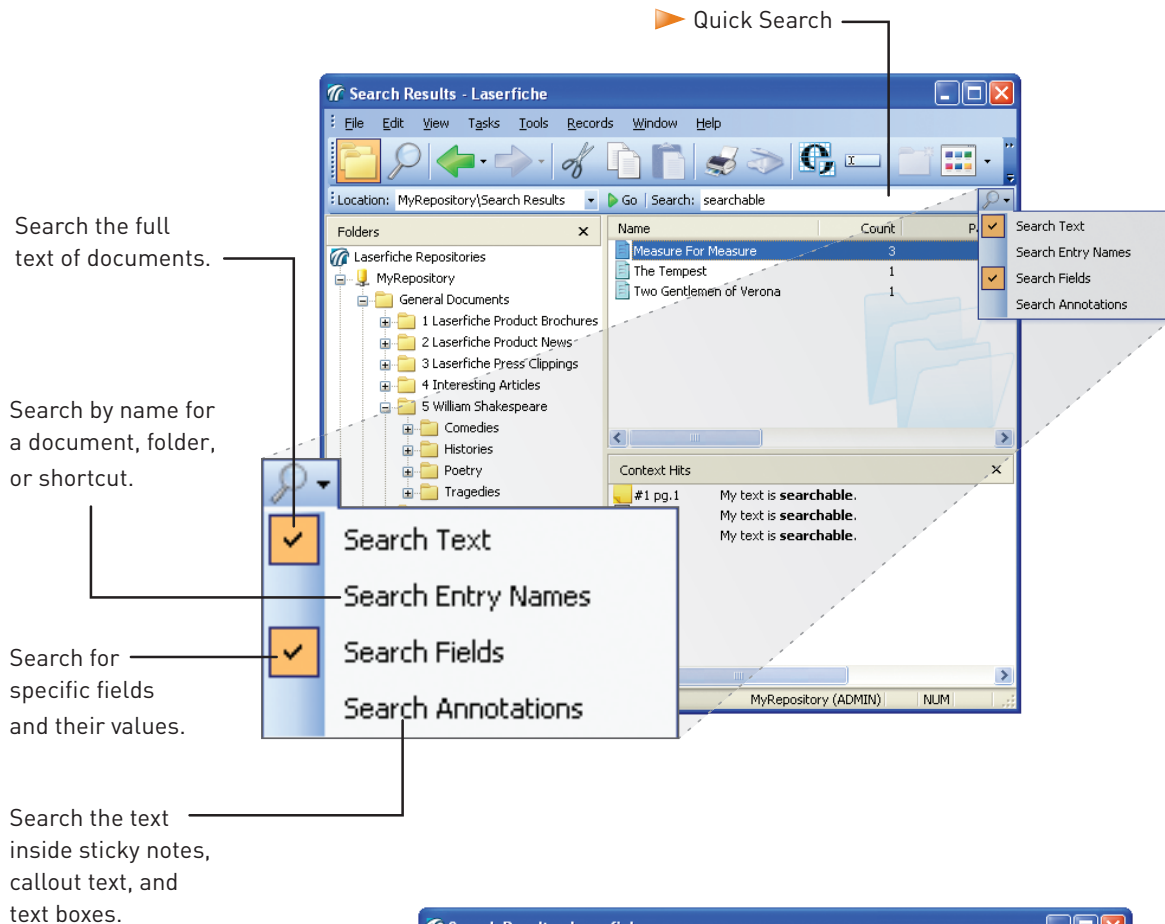


To e-mail a document, select it, click **Tasks**, and select **E-mail Document**. Configure e-mail properties and compose your e-mail from the default e-mail application.

- For more information on navigating and customizing the Folder Browser, see **Learning About Laserfiche** in the Laserfiche Client help files.

Searching

After storing your documents in Laserfiche, you can retrieve them by using one of a variety of search types, or you can use the Quick Search in the Folder Browser to perform searches quickly without opening the Search Pane.



Frequently Used Search Types

▸ **Basic Search**

Search terms:


Search within:


<input checked="" type="checkbox"/> Document Text	<input checked="" type="checkbox"/> All Fields
<input type="checkbox"/> Entry Names	<input type="checkbox"/> Annotation Text

Basic Search can perform the same searches as the Quick Search.

▼ **Modification Date**

Find documents or folders modified between these dates:

from 

to 

☒ Modification Date ☐ Creation Date

Search by modification or creation date.

▼ **User**

Find documents and folders associated with the following user:

☒ Created By ☐ Owned By

☐ Checked Out By

Search for entries created, checked out, or owned by a specific user.

▼ **Advanced Search**

Enter the phrase to search for:

```
{LF:LOOKIN="MyRepository\"} & {LF:Modified>="4/1/2008", Modified<="4/15/2008"} & ({LF:Creator="admin"})
```

☐ Include advanced search criteria in query

View or edit Advanced Search syntax.

- For more information about searching, see **Searching for Documents** in the Laserfiche Client help files, or search support.laserfiche.com.

Document Viewer

The Document Viewer allows you to view your document's images, text, thumbnails, and field data. With sufficient privileges and security rights, you can make changes to a document, apply annotations, set field data, modify the text associated with each page, manage the pages in the document, and print.

Image Pane

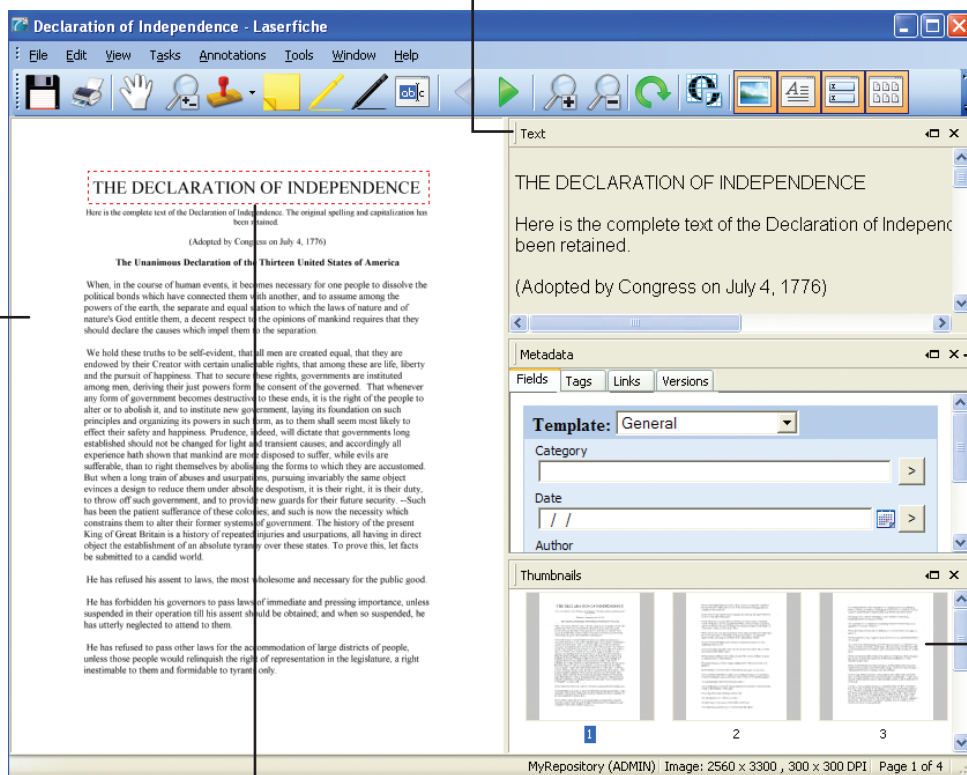
The document image.

Text Pane

Add or modify searchable text.

Metadata Pane

Add additional information to organize your documents.



To zoom to a specific region of a document, hold CTRL while drawing a rectangle around the area to zoom, then release the mouse.

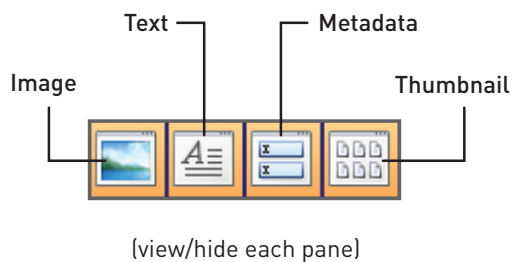
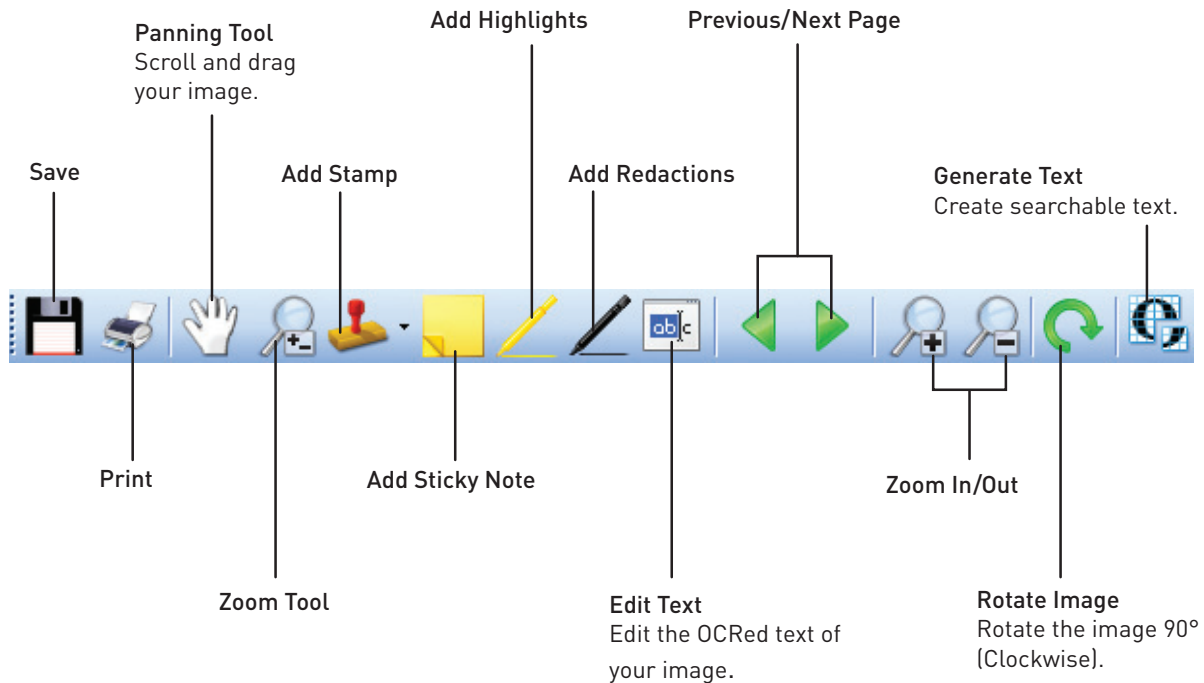
Thumbnail Pane

View pages at a smaller scale for easier navigation.

THE DECLARATION OF INDEPENDENCE

Document Viewer Toolbar

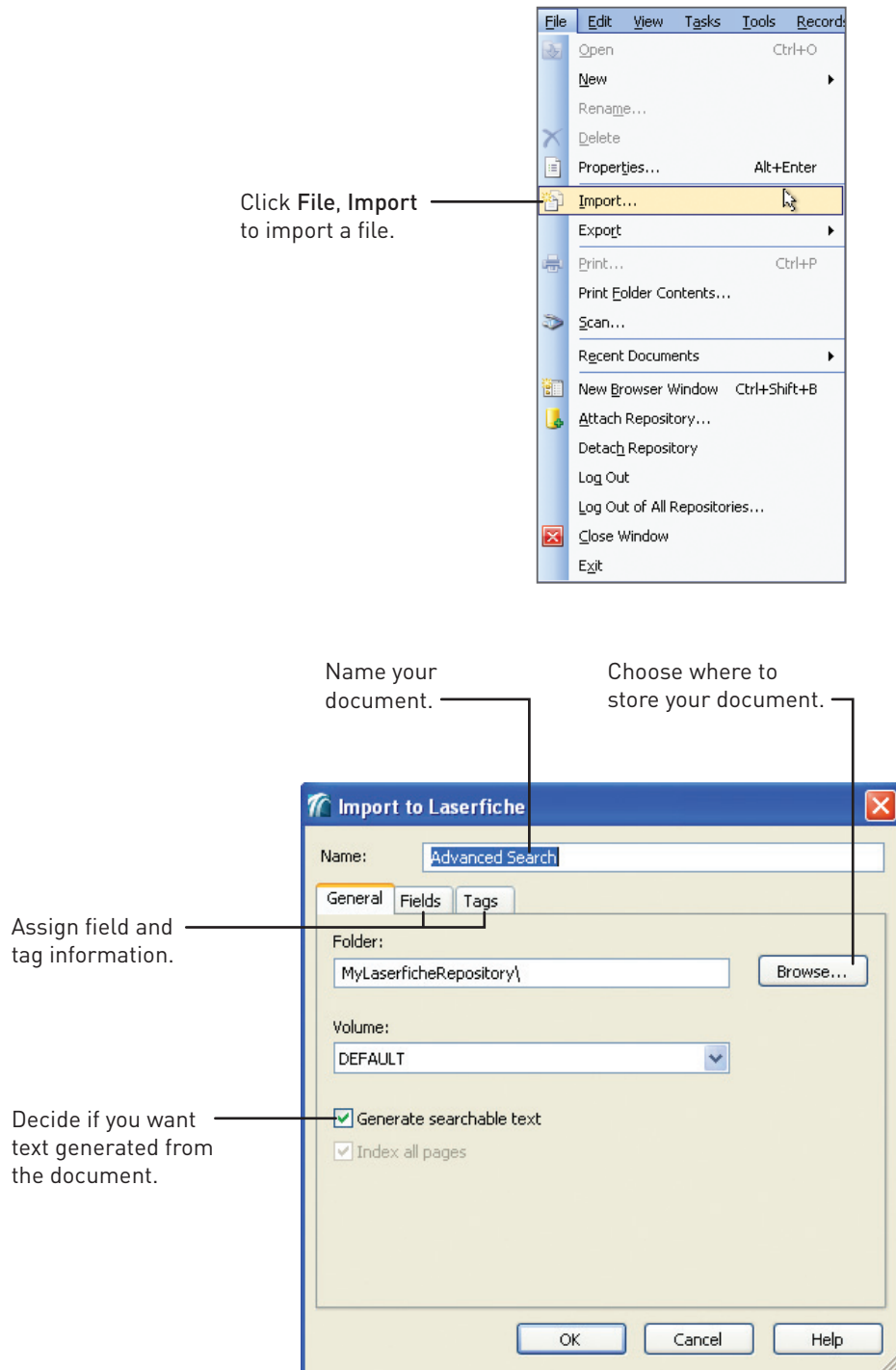
The Document Viewer toolbar allows you to perform basic operations, such as adding image and text annotations, zooming in and out of the image, and determining what type of information is displayed.



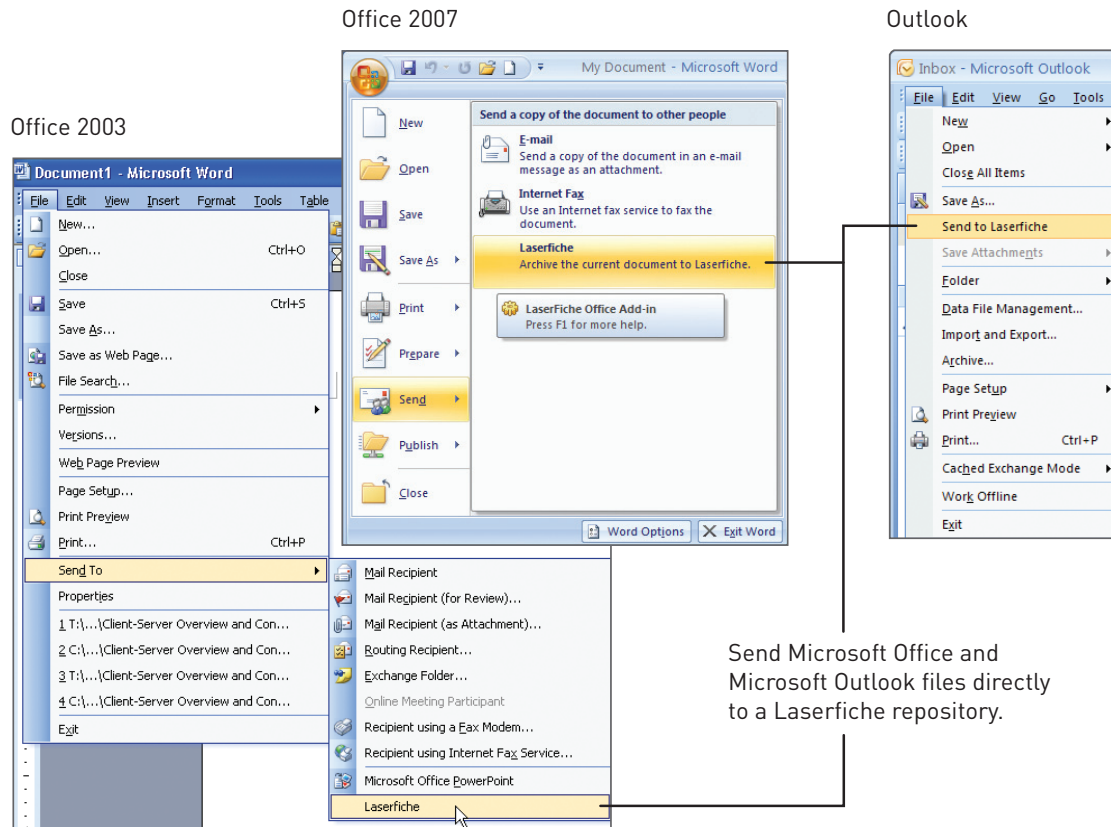
- For more information about the Document Viewer and Toolbar, see **Visual Elements (User Interface)** in the Laserfiche Client help files.

Importing

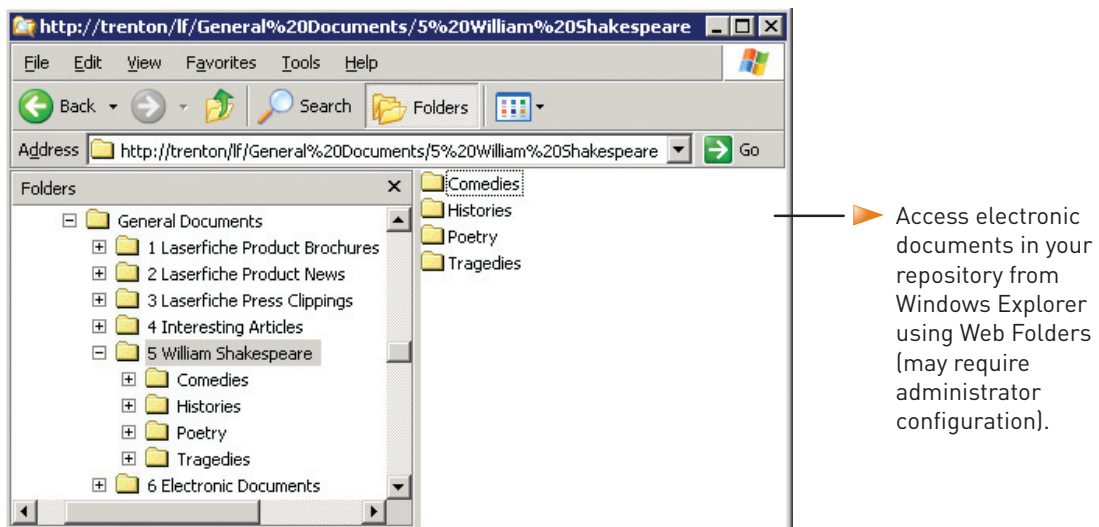
Any file can be imported into a Laserfiche repository. For example, you can import previously scanned images, PDFs, Word documents, and other electronic files. When importing files, you can set basic document properties such as the name of the document, the folder where it will be stored, and field data. You can also send documents from Microsoft Office, Microsoft Outlook, and Windows Explorer directly to a Laserfiche repository.



Microsoft Office Integration

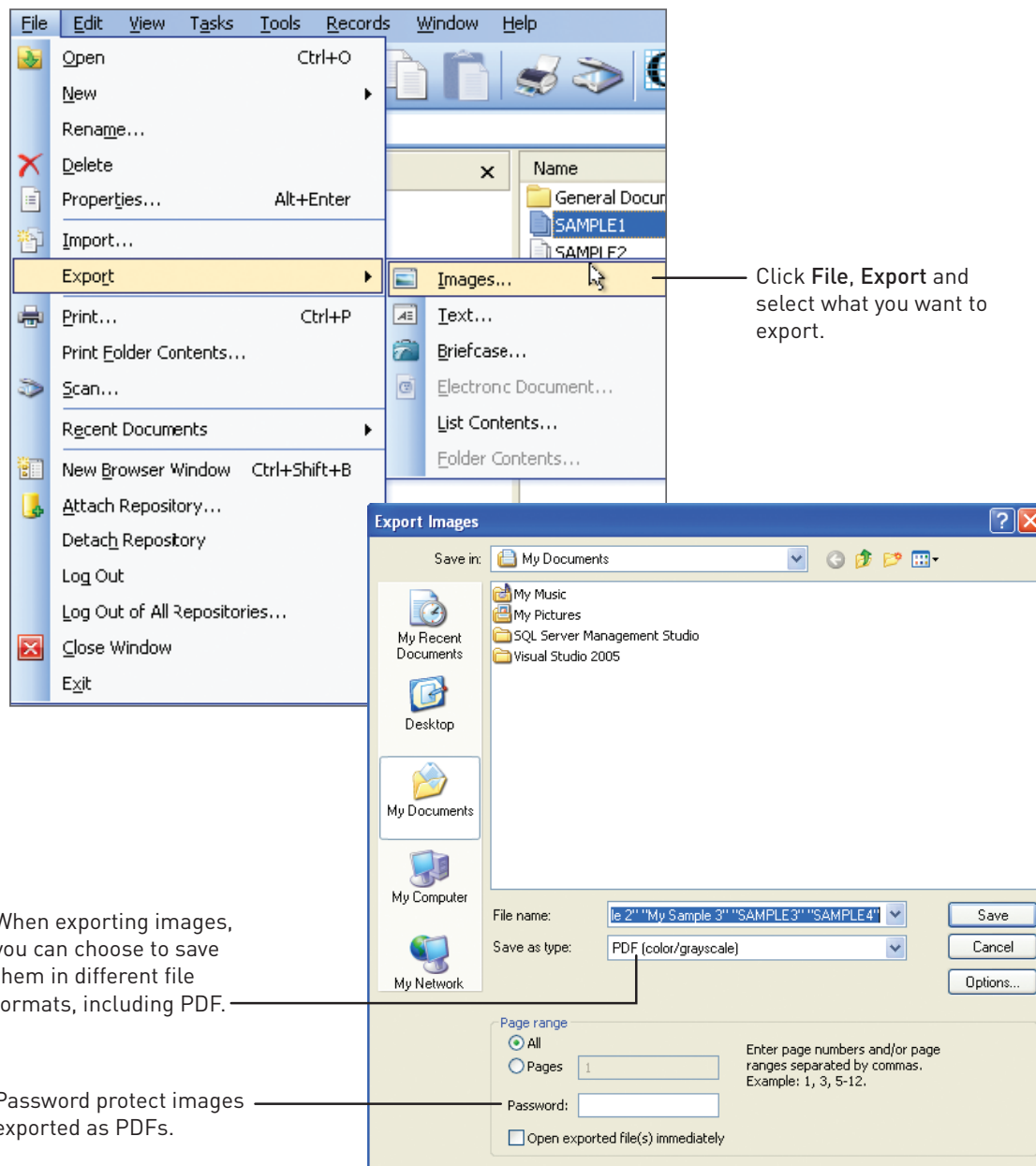


Web Folders



Exporting

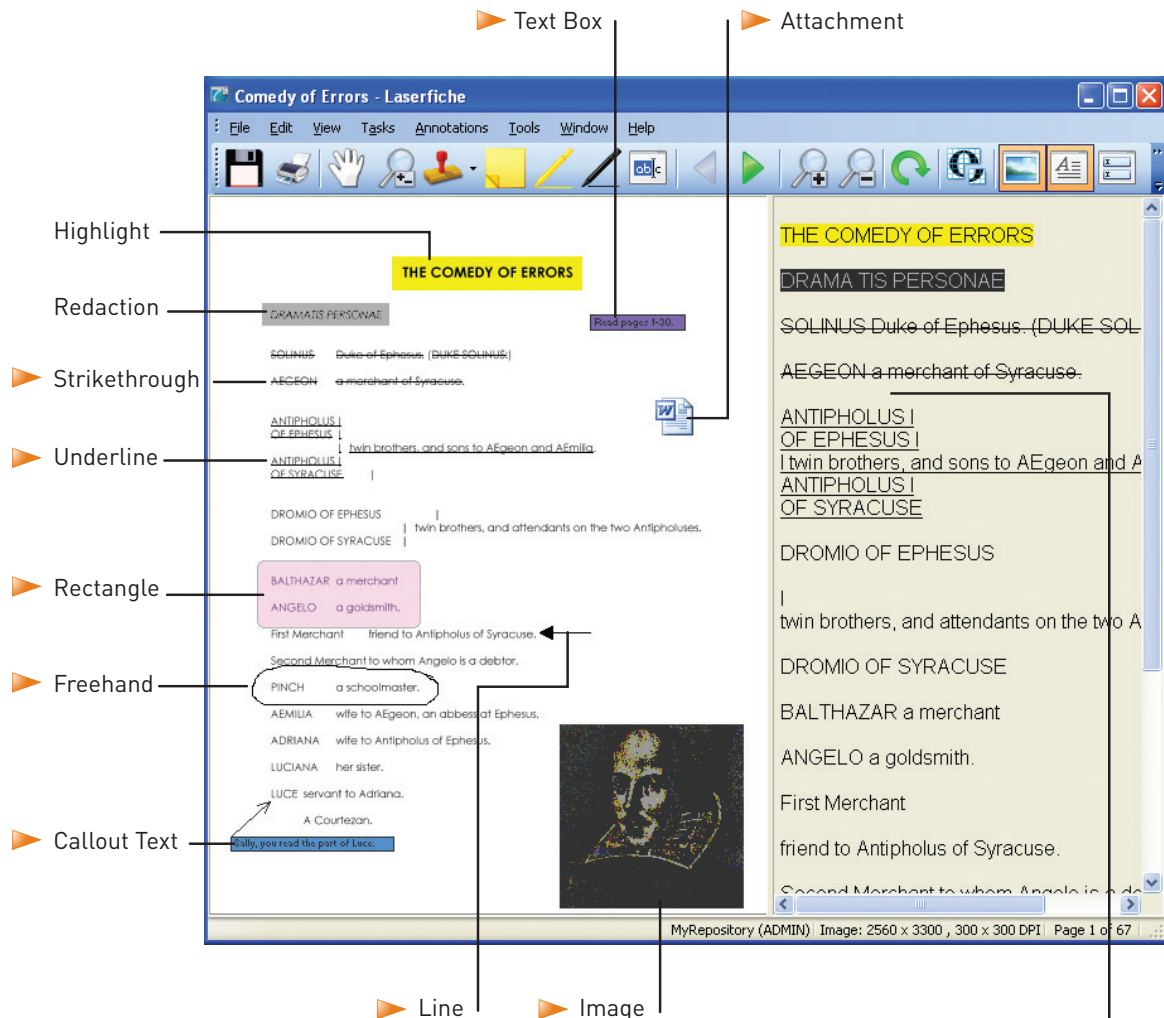
You can export images, text, briefcases, electronic documents, folder contents lists, and search results lists.



- For more information about importing and exporting documents, see **Creating Documents and Exporting From Laserfiche** in the Laserfiche Client help files, or search support.laserfiche.com.

Annotations

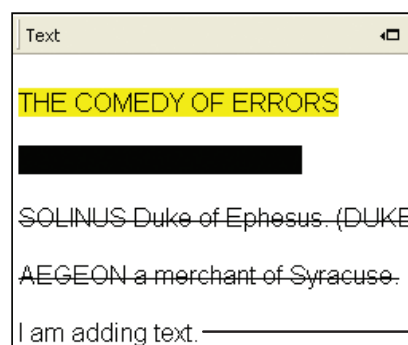
A wide variety of annotations can be applied to your documents, some to either an image or text, and others only to an image. Text can be added to a document in the Text Pane.



To edit text, right-click in the Text Pane and select **Edit Text**. You can also click the **Edit Text** button on the toolbar.

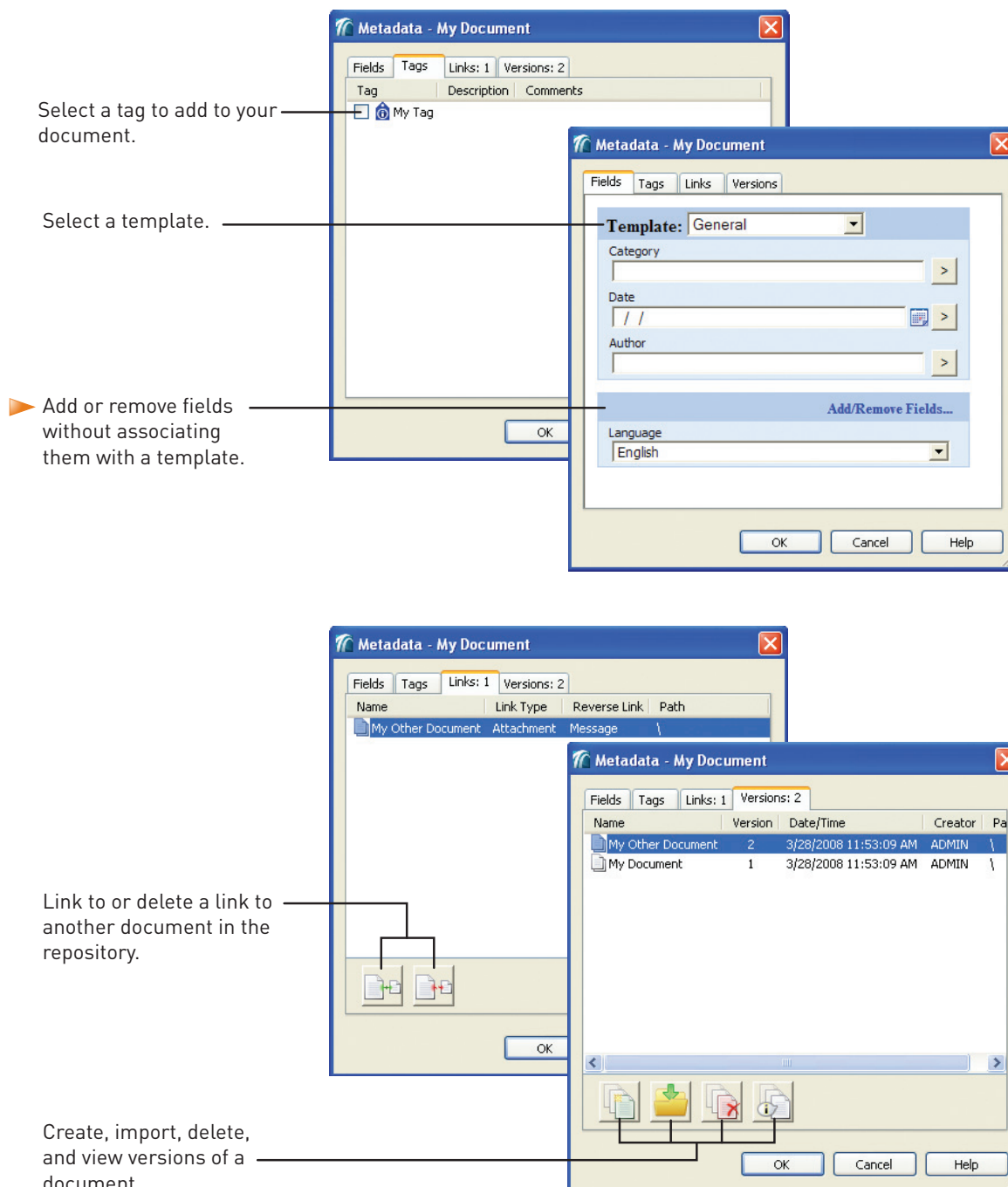


Edit Text
button



Metadata

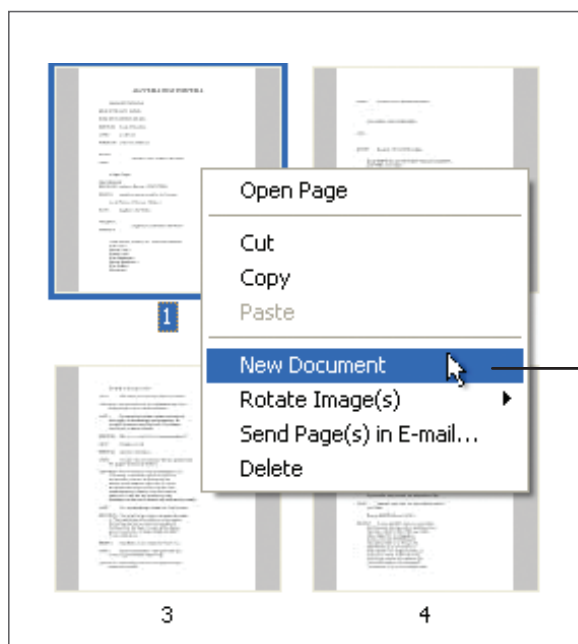
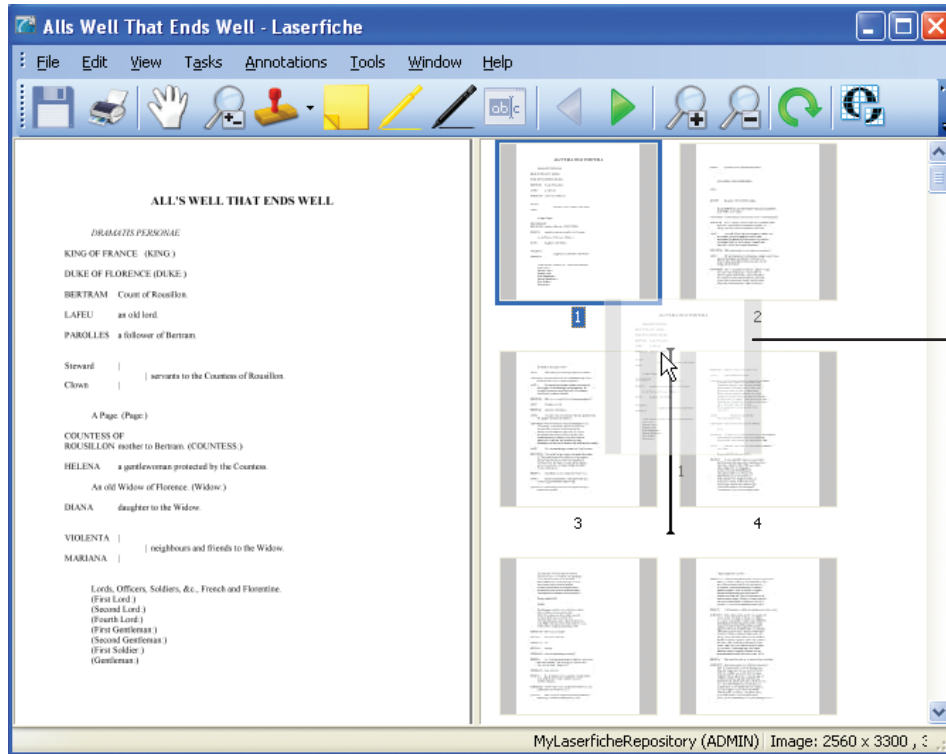
Metadata is information associated with a document and consists of fields, tags, links, and versions. Metadata helps you organize and find documents and folders.



■ For more information about annotations and adding information to documents, see **Viewing and Working with Documents and Assigning Information to a Document** in the Laserfiche Client help files, or search support.laserfiche.com.

Moving Pages

Pages can be rearranged within a document or selected to create a new document.



Scanning: Basic Mode

One way to bring documents into a repository is by using Laserfiche Scanning. You can scan images, perform image processing, and create standard documents from processed images. Basic mode provides a fast and simple interface requiring minimal configuration.

Click the **Scan** button on the Folder Browser toolbar.

Choose the desired scanning mode.

Laserfiche Scanning Mode

Choose a layout for scanning images:

- ☒ **Basic mode**
This mode provides a quick and easy way to scan a Laserfiche document. This option is recommended for beginning to intermediate users with basic scanning needs.
- ☐ **Standard mode**
This mode provides maximum flexibility when scanning Laserfiche documents. It allows users full control over how images are processed into Laserfiche documents.

☐ Don't ask me again

OK Cancel Help

MyLaserficheRepository - Laserfiche Scanning

File Edit View Help

Stop Scanning Done Rescan New Document OCR Scanning Enhancement

Search Directory: C:\Program Files\Laserfiche\Client 8 File Type: *.tif

16%

Transportation in the Philippines

The motto for transportation in the Philippines appears to be "There's always room for one more." I have seen three people riding on a bicycle, five on a motorcycle, ten on a "tricycle" or motorcycle with sidecar, and about 45 on a jeepney that I was on.

For someone as tall as me carrying my home on my back, it means that transportation is not something I take, it is something I endure. But they get me from place to place, and they are very cheap.

are little longer (with bench space for about 14 people) and are usually shiny chrome with day-glo trim and detailing.

Here's my attempt at describing a ride on a jeepney. There's two benches in back. The ride starts out OK, without too many people. But at every stop, more and more get on, until it's packed. But there always room for more. The fare collector puts a board across the back, and two ladies sit on it, with a girl on one lady's lap. My long legs grow achy and my butt gets painfully sore. My pocket knife digs into my thigh, and my daypack creates a pool of sweat on my lap. I can't really change position because it's too packed to move. All I can do is shift my weight from the back of my butt bones to the front. My arm hangs from the handrail overhead and not only helps me from getting thrown around when the jeepney turns or brakes, I can also use it to take some weight off my sore bottom, and maybe develop big biceps in the process. Sucky, all that every happens is that my fingers just start to ache also. Occasionally, my head bumps into the roof or the railing, so I need to crouch as I sit. This makes my back sore, so I try to straighten up every once in a while. But somehow the driver always notices this and aims for a big pothole when I do this as to provide entertainment for the other passengers. Actually, I just made that part up. I think I have a sixth sense that predicts potholes and makes me sit straight up seconds before we hit them. At any rate, my head bumps the roof every few minutes. It doesn't really hurt, it's just that it's one more annoying thing.

But before you think that all I can do is gripe about transportation, there is one good thing I can say about it. It is cheap. In the city, a jeepney costs P1.50 (US\$0.06). Traveling

Document Properties

Document name: Transportation in the Philippines

Fields Tags Settings

Template

General

Category: Transportation

Date: 04/03/2008

Subject: Philippines

Author: Jeff Crain

More Options:

- Create Document
- Store
- New Document
- Rescan

Page 1 of 4 Image: 2560 x 3300, 300 X 300 DPI

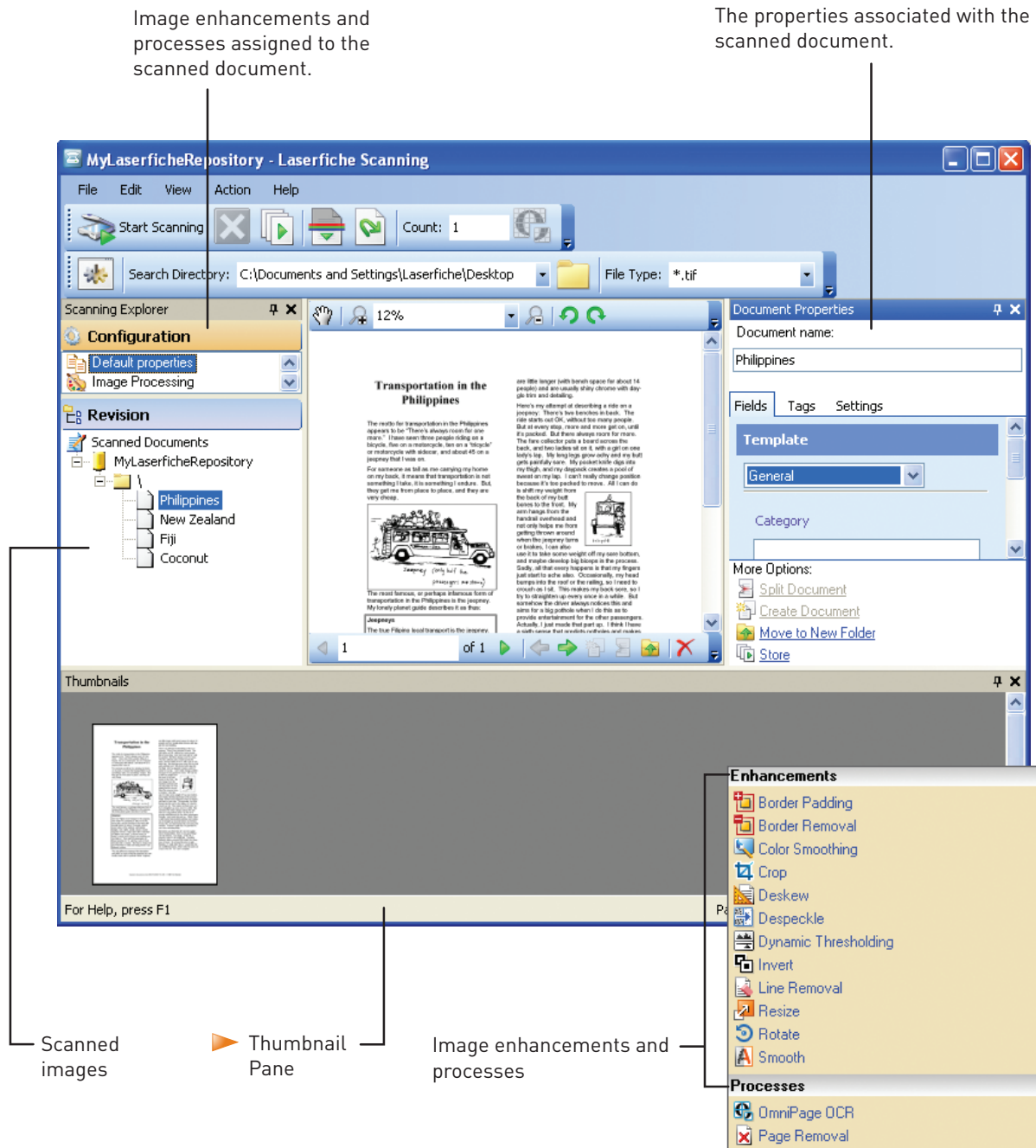
For Help, press F1

Scanned image

The properties associated with the scanned document.

Scanning: Standard Mode

Standard mode offers all the features of Basic Mode, plus the ability to perform advanced image enhancements, scan multiple documents, customize the organization and storage of documents, and configure default document properties to be applied to future documents.

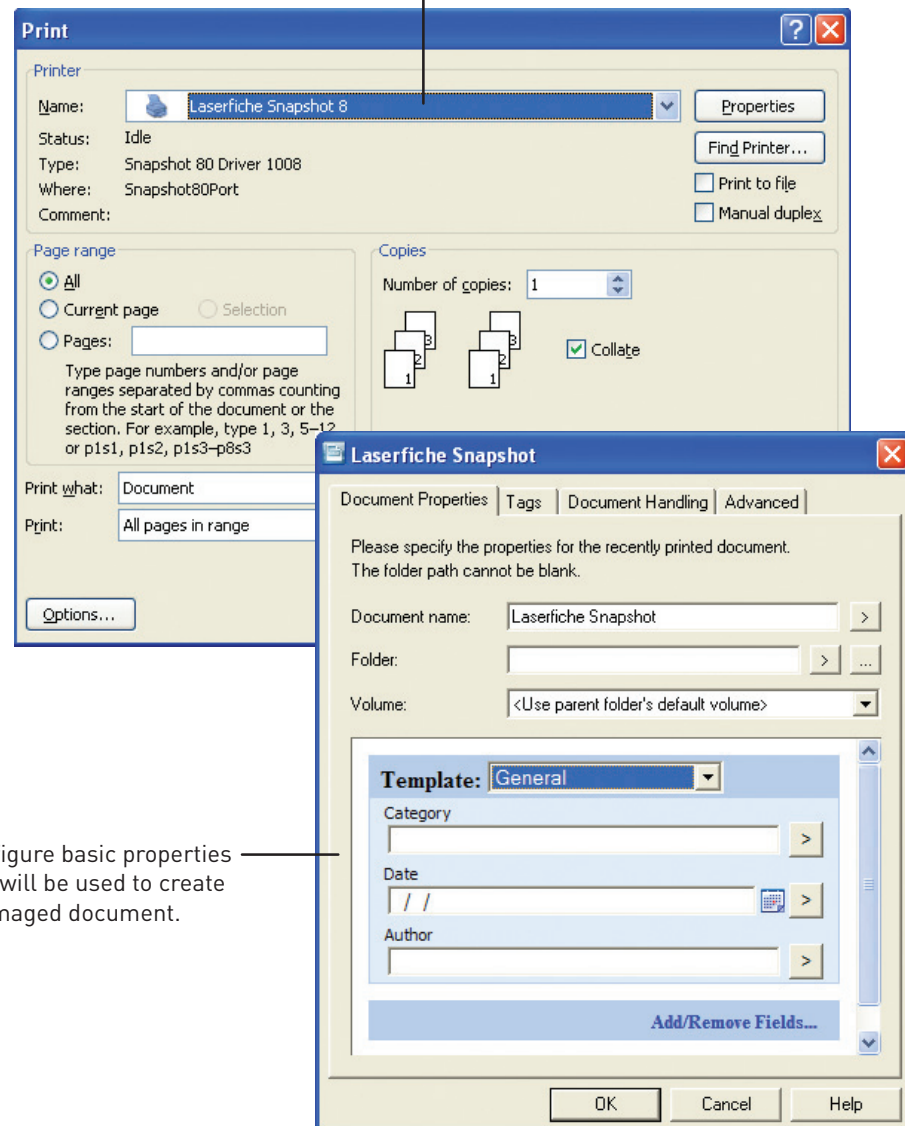


■ For more information on scanning, see **Laserfiche Scanning** in the Laserfiche Client help files.

Snapshot

Laserfiche Snapshot can generate images and text from an electronic file. This eliminates the need to print electronic files and scan them into Laserfiche. Snapshot can process any electronic file that can be opened with a Windows application with printing capabilities.

When printing from a Windows application, select Laserfiche Snapshot.



Configure basic properties that will be used to create an imaged document.

- For more information on Laserfiche Snapshot, see **Laserfiche Snapshot** in the Laserfiche Client help files.

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