Laserfiche®

Training Guide
Full User

Version 8

GENERAL
CODE

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INTRODUCTION

This training guide is intended to enhance the training program developed by General Code. This guide will walk you through the initial introduction to Laserfiche with step-by step instructions.

- ▶ The first section has instructions for tasks available to **Full Users**

- ▶ The second section has instruction for tasks available to **Retrieval Users**

- ▶ The Appendix lists keyboard shortcuts for Laserfiche

WHAT IS LASERFICHE?

Laserfiche® is a full-featured Windows-based Electronic Document Management System (EDMS) that enables organizations easily file, catalog, and retrieve documents, as well as automate many document - centered business processes.

Laserfiche files include an electronic non-editable image of the document, along with electronic text, and metadata that creates a searchable repository of document information. Laserfiche also allows for storage of "Native File Format" documents such as Microsoft Word, or PDFs. The Native File Format documents are also a part of the searchable repository.

LOGIN SCREEN

WHAT IS IT?

The login screen is used to sign in and access the Laserfiche repository. For security of the documents, most users will have to log in each time they work with Laserfiche.

LOGGING INTO LASERFICHE

Launch Laserfiche by double-clicking on the desktop icon or selecting Laserfiche from your program menu.

▶ The Login screen should show the available repositories that you have access to
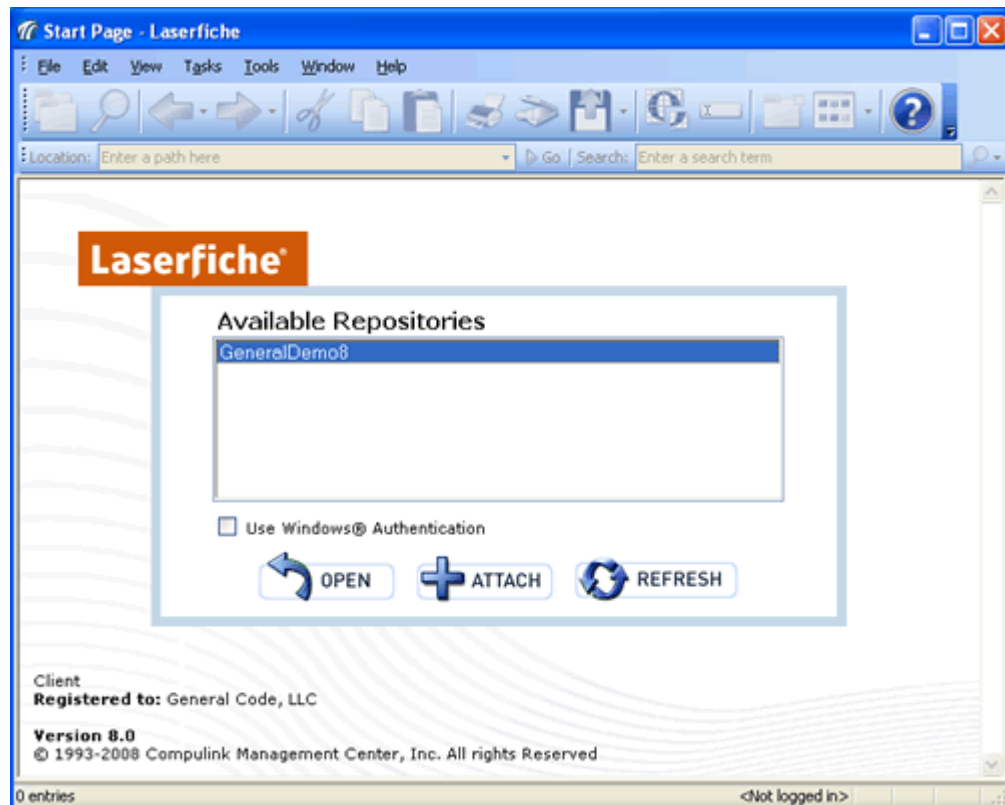
Users can take three actions here:

▶ Click the **Open** button to launch the application. You may be prompted to enter your user name and password

Note: The launch screen lists the Laserfiche repositories that are available. If more than one repository is listed, verify that the repository you want to use is selected before clicking **Open**.

▶ Click the **Attach** button to open the Attach Repository dialog box allowing the current workstation to access a repository that was previously unavailable

Note: This dialog box is used only if you need to attach a repository not listed in the Login screen.

▶ Use the Refresh button to look for additional repositories if the one you want to use does not appear in the window

EXITING LASERFICHE

When you exit Laserfiche, you may get a dialog box asking you to confirm the action.

LASERFICHE WINDOWS

WHAT IS IT?

Laserfiche opens three types of windows:

▶ The **Laserfiche Main Window**, used to find, search and organize Laserfiche documents

▶ The **Laserfiche Scanning Window**, used to control scanning activities, is covered in the scanning section

▶ The **Laserfiche Document Window**, where you can view, modify, or annotate individual documents, is covered in the document section

LASERFICHE MAIN WINDOW

The left pane of the Laserfiche main window has two views:

▶ The Folder view

▶ The Search view

You can toggle between the two views by clicking on the *Folder* and *Search* buttons on the toolbar.

The **Search** view will be covered later in this guide.
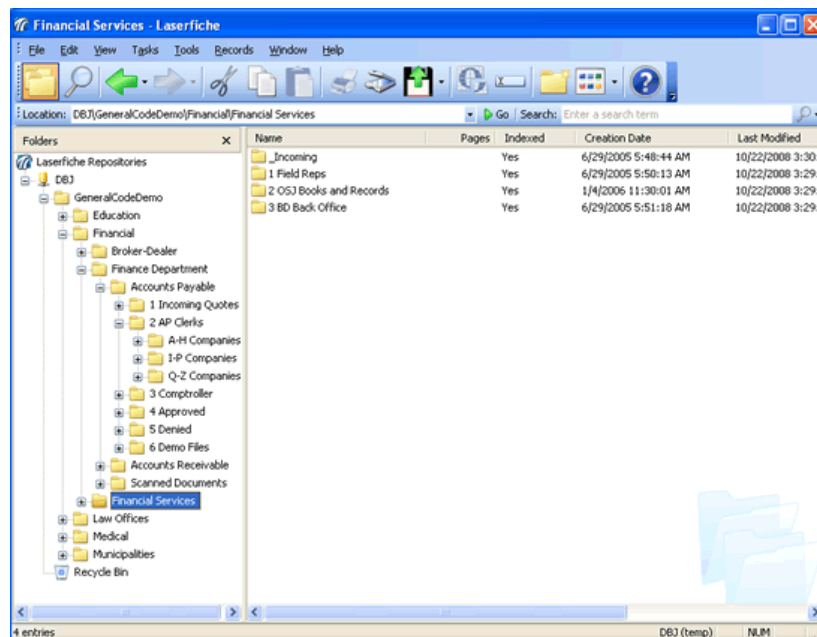
FOLDER VIEW

The **Folder** view displays the folders in your Laserfiche repository. It displays and functions the same way as the Microsoft Windows Explorer.

The left-hand pane lists the folders contained in the main repositories.

▶ Clicking on the + sign next to the folder icon expands it to show the folders it contains

▶ Clicking on the – sign next to the folder hides the folders it contains

▶ Clicking on any folder displays the contents of that folder in the right-hand pane

CONTENTS PANE

The **contents** pane displays the folders and documents in the currently selected folder, allowing you to easily navigate up or down the folder structure.
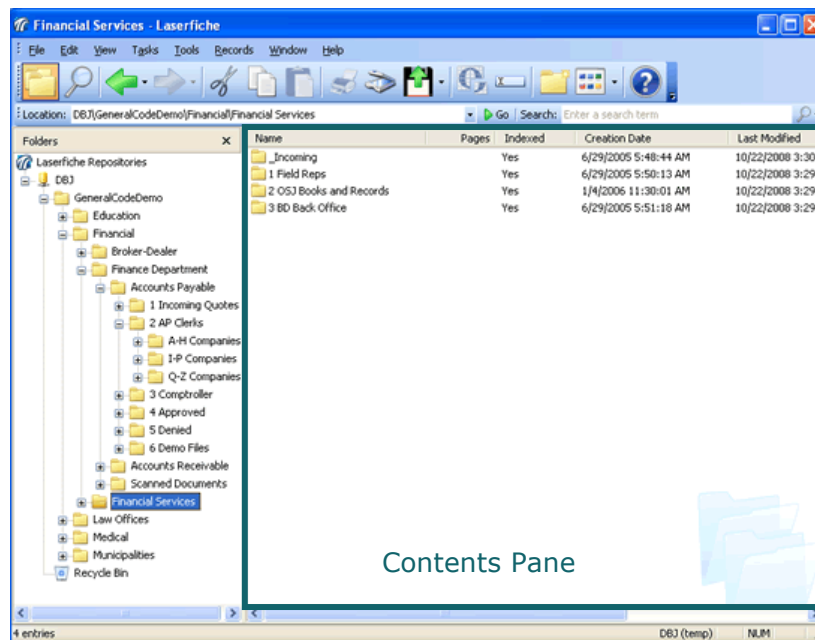
To browse folders using the contents pane:

▶ To open one of the listed folders, double-click it or use the arrow keys to select it and then press the Enter key

▶ You can view the folders up a level by pressing the Backspace key

ICONS

Within the Contents Pane, documents can appear with different icons.

Native-Format Document

No Template Attached

Template Attached

Name	Pages	OCR'ed Pages
BSC Project Plan		
Senior Protection Program...	2	All
Trading Authorization and...	4	All

MENU BAR

The Laserfiche Menu Bar is where you access the common commands to work within the application.

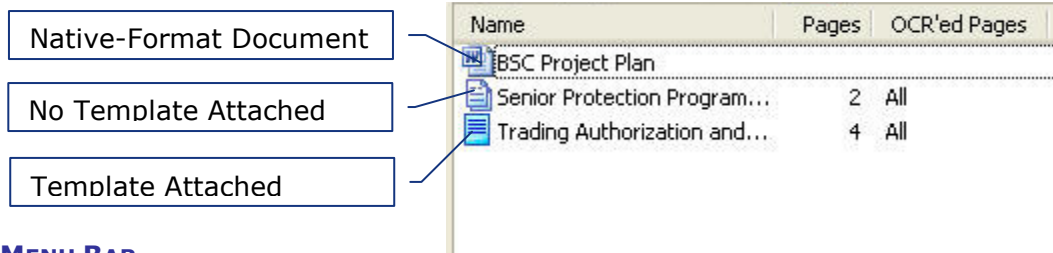| *File*	The File Menu allows access to basic application functions, such as creating new documents and folders, as well as changing the repository. **Note:** The Close command just closes the current window. The Exit command closes Laserfiche. There is also a New Browser Window command that opens an additional Laserfiche window for searching or browsing.
Edit	The Edit Menu accesses basic copy and paste functions
View	The View Menu allow access to modify the view in the contents pane, including how folders and document listings are displayed
Tasks	The Tasks Menu allows users to access Laserfiche capabilities, such as OCR. Also allows users to attach a document to an email as either a .pdf or .tif.
Tools	The Tools Menu lets users customize and set defaults for Laserfiche, as well as access administrative functions
Window	The Window Menu allows users access to commands to reorganize multiple Laserfiche Windows
Help	The Help Menu provides access to the Help database and access to online assistance.

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TOOLBAR

The Laserfiche Toolbar is where you access the common commands to work within the application.

Icon	Name	Function
	Toggle - Folder View or Search view	Toggles window between folder mode and search mode
	Forward / Back Arrows	Allows the user to retrace their browsing history
	Cut / Copy / Paste	Allows the user to cut or copy a folder or file and paste it into a new location
	Print	Allows the user to print a file
	Scan	Opens the scanning window
	OCR	Allows user to extract text from a document
	View Fields	Displays Metadata information for a document
	New Folder	Create a new folder
	View Style	Display folders as icons or thumbnails
	Help	Opens the Help window

RECYCLE BIN

If the Recycle Bin is enabled and you have the security rights to delete items within Laserfiche, they will be moved to the Recycle Bin when deleted. The documents, folders or shortcuts will not be permanently deleted from the Laserfiche repository until they are "Purged" by an administrator.

Entries in the Recycle Bin cannot be opened or modified and the entries will not be included in a search. If you need to open or modify a document or folder in the Recycle Bin, you must restore it first.
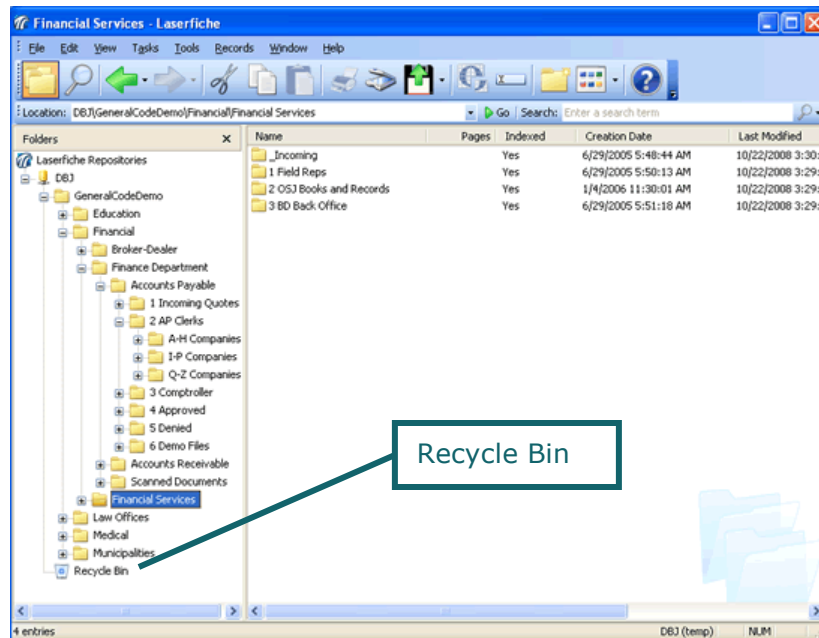
Recycle Bin

TO MOVE AN ITEM TO THE RECYCLE BIN

1. Select the document or folder

2. Do one of the following:

   ▶ Press the *Delete* key

   ▶ Click on the File menu - Click Delete

   ▶ Select the entry then drag and drop it to the Recycle Bin

3. Click *Yes* to confirm

TO DELETE AN ITEM PERMANENTLY

1. Move the document or folder to the Recycle Bin

2. Click the Recycle Bin in the Folder Pane

3. Click on the document within the Contents Pane

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4. Right-Click on selected entry **and** Click on ***Purge***

Note: If you have security rights to Purge all entries you can right-click on the Recycle Bin within the Folder Pane and ***Purge All Entries***

CUSTOMIZING THE LASERFICHE WINDOW

Laserfiche allows for customization of the Laserfiche window. Some examples listed are Page Scroll, Customizing Toolbars and Display Columns and are a small subset of "Customizations" that a user can do with the Laserfiche Window.

WHY YOU SHOULD CUSTOMIZE LASERFICHE

Some minor modifications to the Laserfiche defaults will make the Laserfiche window easier to work with, the options you change here will:

▶ Make it easier to view the document image

▶ Provide additional space to view useful information in the search results window

▶ Make the ***Refresh*** command easier to access

▶ Allow you to see the location of documents in the Search results window

TO CUSTOMIZE YOUR LASERFICHE WINDOW

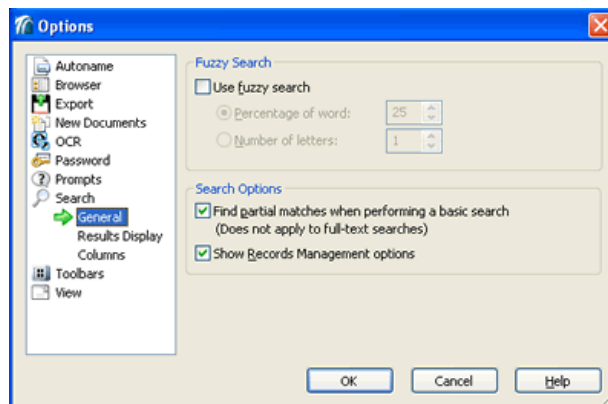**Steps for Customizing Page Scroll:**

5. Select Tools > Options, from the menu bar

  ▶ This opens the Options window

6. Click on the ***View*** icon in the left pane

7. Select the ***General*** sub-icon if it is not already highlighted

8. Check the box marked ***Page Scrolling***

  ▶ This will let you scroll between pages of a document in the document window

Steps for Customizing Toolbars:

1. Select Tools > Options, from the menu bar

   ▶ This opens the Options window

2. Click on the **Toolbars** icon and click the **Customize Toolbars** button to open the window

3. On the Commands tab, choose **All Commands** in the Categories list

4. Scroll down on the Commands list until you see the **Refresh** button

5. When you do, drag it to the toolbar

This adds the **Refresh** button to the Current toolbar buttons window. You can highlight it there and use the Move Up and Move Down buttons to position it where you want.

The **Refresh** button will make it easier to view newly added documents.

6. Click **Close** to return to the Options window

Steps for Customizing Display of Columns:

1. Select Tools > Options, from the menu bar

   ▶ This opens the Options window

2. Click on the **Search** icon in the right pane

3. Select the **Columns** sub-icon

4. Under Column Display, check **Path**

   ▶ This will add the path to your search results list and will make search results easier to work with.

5. Click **OK** to close the Options window.

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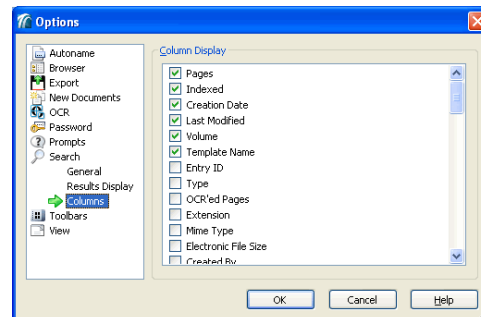
FOLDER STRUCTURE

WHAT IS IT?

The Folder Structure is the methodology that an organization uses to establish how Laserfiche documents are stored in the repositories.

It is critical that organizations create a structure for their Laserfiche folders that fits with Best Practices and the organization's process. Just as with physical files, if it is not clear where each document belongs, it may take creative searching to find it.

Folder structure goes hand-in-hand with how you name the documents. The folder structure and naming conventions of documents should be set up in such a way that helps users find documents quickly without necessarily knowing the folder structure or naming convention.

Laserfiche users should establish and communicate the folder structure early on, before adding documents to the system.

When creating the folder structure, remember:

 ▶ Use a structure that reflects the organization and the existing file system by department, function, etc

 ▶ Think about how documents were stored historically and how they will be stored going forward. Include folders to account for the past and going forward.

 ▶ Consider security concerns and access needs

A typical folder structure might look like these examples:
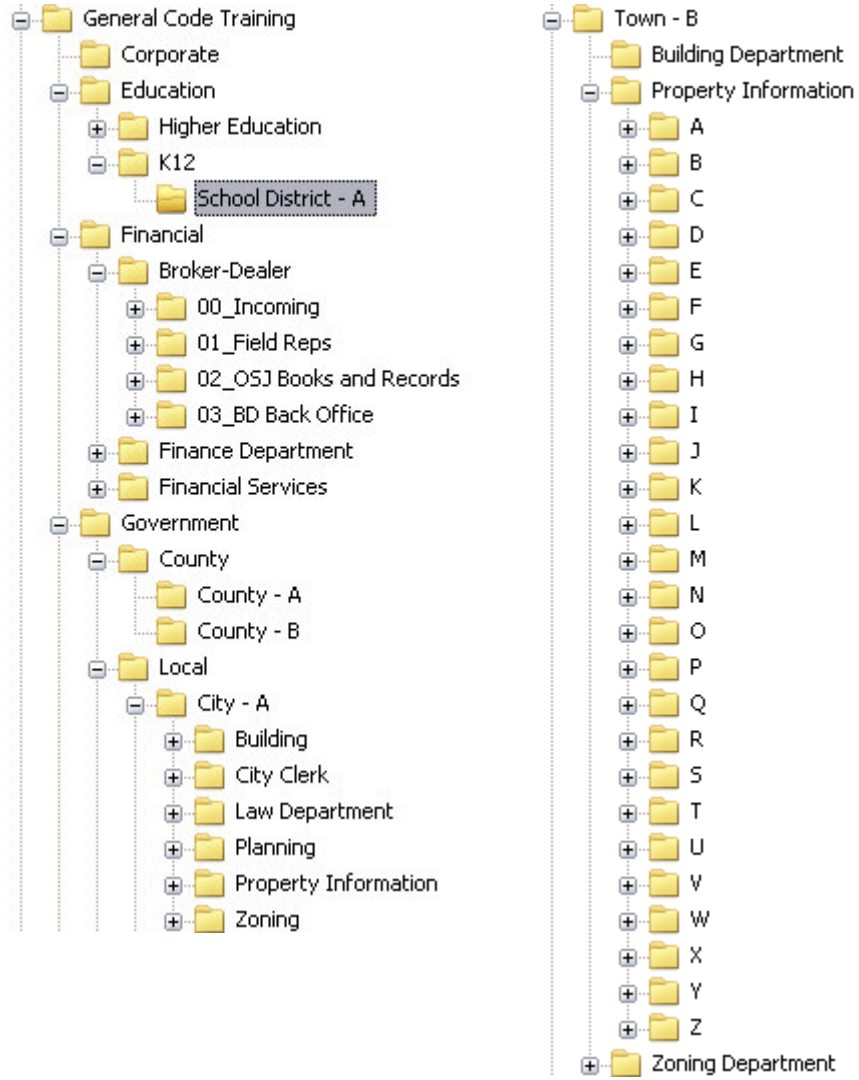
BEST PRACTICES FOR SETTING UP A FOLDER STRUCTURE

The way your Laserfiche folder structure is set up will have a lasting effect on how the users will have to work every day. Taking extra time at the early stages will save a lot of time and frustration in the future.

Key items to consider when setting up your folder structure

> ▶ **What is the most common way in which users are going to search?**

The folder structure should be set up in a way that allows users to browse directly to the document they want.

> ▶ **What are the secure areas within each department or area?**

Set up the folder structure by department first, and then by the security settings and access privileges needed.

> ▶ **How are documents currently being stored, and is this the best way to continue?**

Decide what practices you want to continue and which ones you should take the opportunity to change.

NAMING CONVENTIONS

WHAT IS IT?

The naming conventions are the rules established for identifying documents as they are added to the Laserfiche repository.

A key value of Laserfiche is its ability to find and display documents quickly. However, it is important to establish standard and consistent conventions for naming documents so users can best take advantage of the Search functions.

BEST PRACTICES FOR NAMING CONVENTIONS

Naming conventions should be established so that every document receives a unique name. While Laserfiche may provide a warning if you try to save a document under the same name as another document in the folder, it will save it.

Items that should be established for consistency include:

> ▶ **Dates**
> For sorting purposes, the best practices state dates should be entered as yyyy-mm-dd

> ▶ **Abbreviations**
> Abbreviations should be avoided when possible, but used consistently when necessary

> ▶ **General Naming**
> Establish consistent names for classes of documents

Note: Laserfiche searches only retrieves documents when the search window contains the exact name or uses wildcards. An asterisk (*) serves as a wildcard character in the Search box.

For example, if you are searching for a document named **2008-06-25 Special Meeting**, you can search for:

> ▶ 2008-*

> ▶ *06-25*

> ▶ *Special Meeting

However, if the search for 06-25 without the wildcard character the document will not appear.

DOCUMENT TYPES AND SEARCHING

Laserfiche documents contain different elements to facilitate searching and other functions. The document includes:

> ▶ An image of the document, saved as a .tif file

▶ ASCII Text, generated by OCR software

▶ Metadata, entered in the template fields

▶ Text Annotations

SEARCH PROCESSES

There are two basic search methods:

▶ **Browsing**

▶ Using the **Laserfiche Search** window

Both of these processes are facilitated when users create thought-out and purposeful folder structures, and establish standard, consistent naming conventions.

CREATING FOLDERS

WHAT IS IT?

The Folder Structure should be setup and permissions provided prior to storing documents within the Laserfiche repository.

Creating folders should be reserved for users with an understanding of the overall folder structure. In practice, though, if the structure has been developed clearly, it is rare that an unplanned folder will be needed.

TO CREATE A NEW FOLDER OR SUBFOLDER

1. Highlight the folder in which the new folder will be contained

2. Click on the New Folder button on the toolbar

   ▶ **Option**: With the contents of the current folder listed in the right-hand pane, right-click in that pane and select **New Folder** from the drop-down menu.

3. Name the folder while the **New Folder** designation is still highlighted

4. Press **Enter**

SCANNING WINDOW

WHAT IS IT?

The **Laserfiche Scanning** window allows users to scan paper documents and store them as Laserfiche documents. With the usual scanning preferences already configured, users can conduct a Simple Scan by clicking on the *Scan* button on the Browser toolbar.
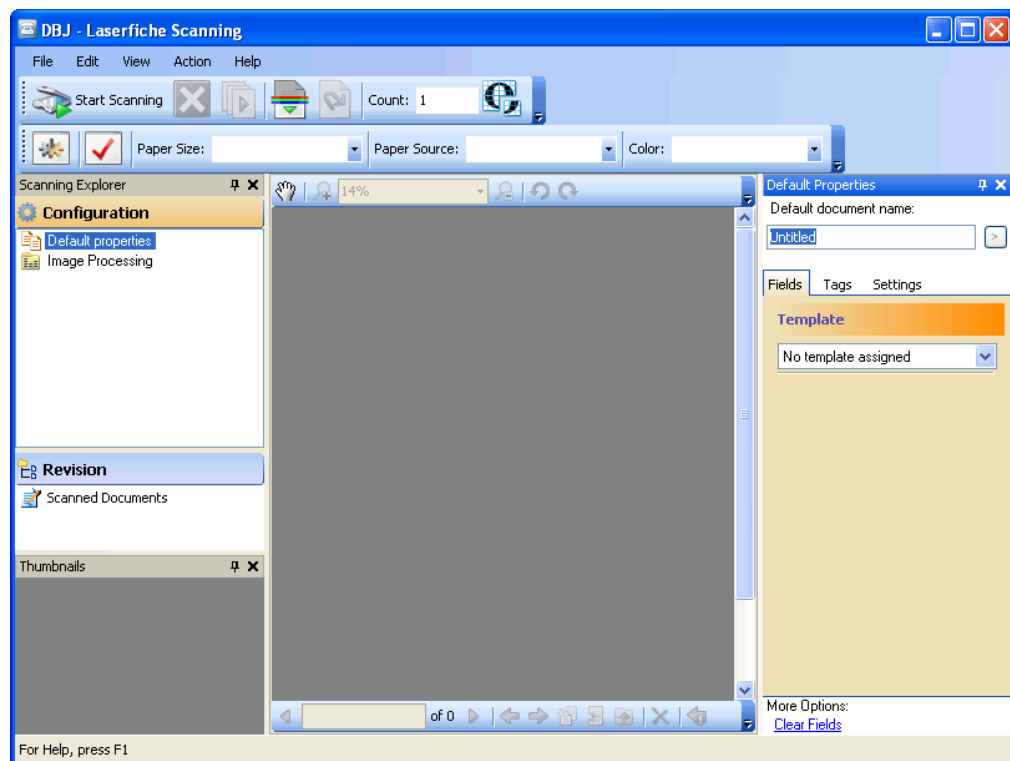
If you receive a window asking you to select Basic or Standard mode, select *Standard mode*.
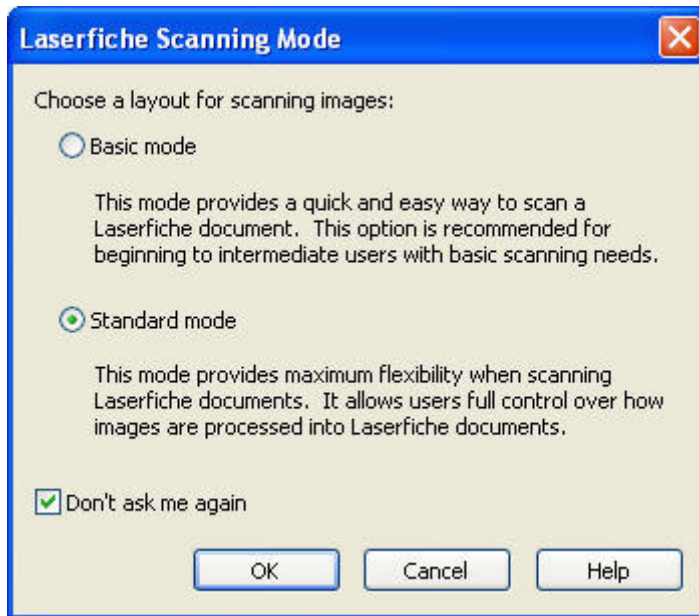
Check *Don't ask me again*, then click *OK*.

This opens the **Laserfiche Scanning** window.

MOVING AROUND IN THE SCANNING WINDOW

The Scanning window has three main panes:

▶ The **Configuration** pane

▶ The **Image** pane

▶ The **Document Properties** pane

CONFIGURATION PANE

The **Configuration** pane shows the processes and enhancements set to be applied to scanned images.

Note: Laserfiche allows different Processes and Enhances to run while scanning to improve the image being scanned for the document.

IMAGE PANE

The **Image** pane is where you can preview scanned images to adjust settings before making the final scan.

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DOCUMENT PROPERTIES PANE

The **Document Properties** pane lets you add metadata to the document and select how it will be saved. There are three tabs:

▶ **Fields**
This tab is where you enter data in to the template
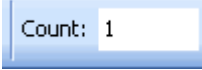
▶ **Tags**
This is where users add tags, if used

▶ **Settings**
Use this to set the default volume where scanned images will be saved

There are toolbar buttons at the top of the window for common actions:

Icon	Name	Function
Start Scanning	Start Scanning	Begins the scanning process
	Stop Scanning	Stops scanning, even if there are pages left in the feeder
	Store	Moves the document from the scanning process to the Laserfiche folder
	Resume	Restarts the scanning process adding pages to the end of the current document
	Rescan	Scans a page that scanned incorrectly
Count: 1	Scan Count	Allows user to add a count token to the document title
	OCR	Allows the user to OCR the document if OmniPage OCR was not selected as a process

SCANNING

A Simple Scan allows you to scan documents into Laserfiche without any of the Enhancements and Processes, to be discussed later in this guide.

TO CONDUCT A SIMPLE SCAN

1. Open the folder where you would like to store the new document(s)

2. Click the *Scan* button to open the **Laserfiche Scanning** window

3. Check that the settings in the two drop-down menus are correct:

   ▶ Scanning source

   ▶ Paper size

4. Ensure that you are scanning to the correct folder

5. Under Document Properties, name the document

6. Enter template information:

   ▶ Under the **Fields** tab, select the desired template for the documents you are about to scan

   ▶ Enter the desired data into the appropriate fields

7. Click the *Start Scanning* button

8. Review your scanned documents:

   ▶ Each scanned page will be viewable in the center pane. You can page through them using the *Forward* and *Back* Arrows

   ▶ Make any desired corrections

9. Click *Store Documents* to store the documents in the designated Laserfiche folder

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DOCUMENT WINDOW

WHAT IS IT?

The **Document Window** is the workspace to view and work with individual documents. When users double-click a document in the main window, the document opens in a new document window.

Users can have several document windows open at once.

There are **four panes** in the document window.
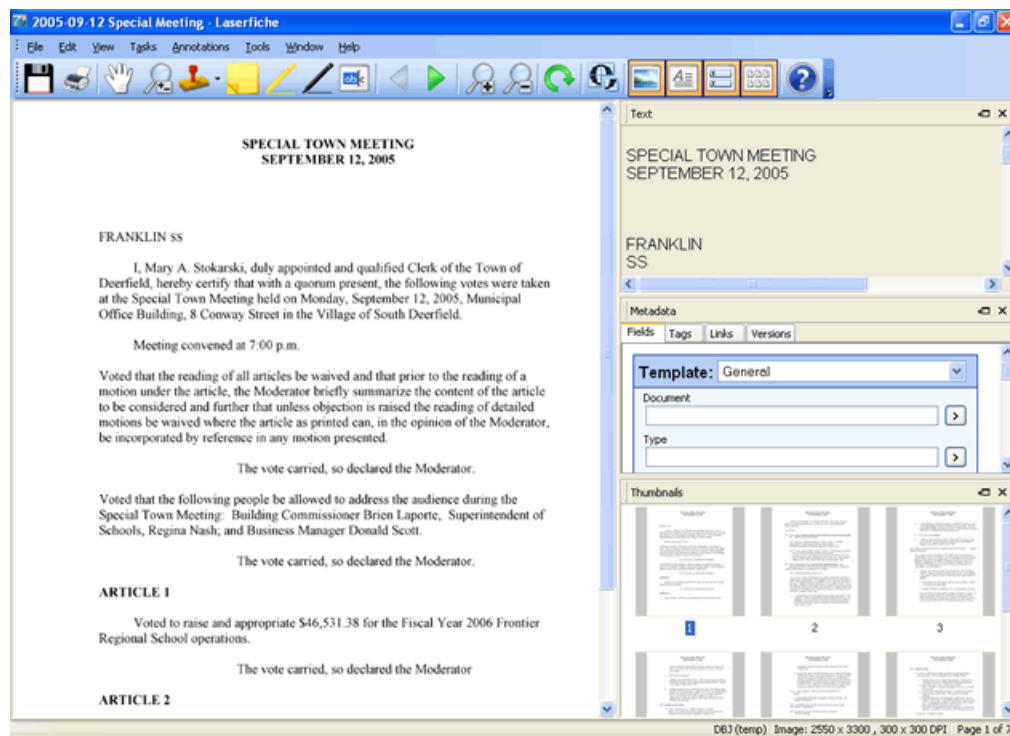
IMAGE

The **Image** pane shows a picture of the captured document, which is the permanent record. In the image pane, you can annotate the document on a separate layer that does not change the image file.

TEXT

The **Text** pane displays the document text generated by the Optical Character Recognition (OCR) software. The OCR software has an accuracy rate of approximately 85%. The OCR text can be edited if needed.

You can also copy and paste this text into other documents, or e-mails.

METADATA

The **Metadata** pane contains additional data associated with the document:

▶ **Fields**

Lists keywords added to the document template.

▶ **Links**

Laserfiche lets you link different documents in the repository so it is easy to open related documents. Double-clicking on a link opens the document in a new window.
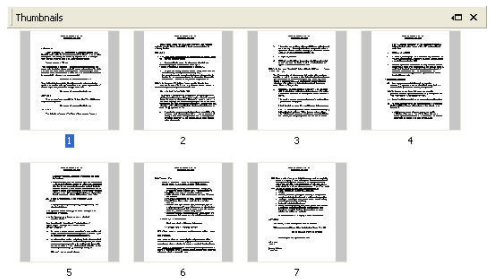
▶ **Versions**

Allows for different versions of the document that have been created and renamed.

THUMBNAILS

The **Thumbnails** pane shows small images of every page of the document. Here, you can double-click a thumbnail page to display in the image pane or re-order and delete pages.

You will also use the Thumbnails pane to break batch-scanned documents into individual Laserfiche documents.

You can open and close individual panes in a document window by using the *toolbar* buttons.

MENU
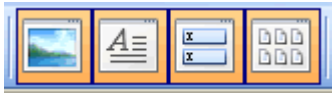
The **Menu** bar on the Document window is similar to the Folder Browser window

File	Accesses basic application functions, such as creating new documents and folders, as well as changing the repository. Note that there is a Close command that just closes the current window, as well as Exit to exit Laserfiche. There is also a New Browser Window command that opens an additional Laserfiche window for searching or browsing.
Edit	Accesses basic copy and paste functions, as well as searching text
View	Allows users to navigate the document as well as modifying the image
Tasks	Allows users to generate searchable text and email documents
Annotations	Allows users to add annotations including those not on the toolbar
Tools	Lets users modify the document, as well as extract text and other functions
Window	Automatically reorganizes open Laserfiche windows on the desktop
Help	Laserfiche User Guide, also allows users to access online assistance

DOCUMENT TOOLBAR

There are *toolbar* buttons for common actions.

Icon	Name	Function
	Save	Save changes made to annotations, text, or layout
	Print	Prints a document
	Panning Tool	Drags the viewable area of the document
	Zoom tool	Zooms in or out on a selected area of the document
	Stamp	Allows a user to place a predefined stamp on a document
	Sticky Note	Allows a user to place a note on a document
	Highlight	Allows a user to highlight a portion of a document or OCR'ed text
	Redact	Allows a user to block a portion of a document or OCR'ed text from view
	Edit Text	Allows changes to be made to the OCR'd text of a document
	Previous or Next Page	Takes the user to the next or previous page of the document
	Zoom In or Out	Zooms in or out from the center of the viewable area of the document
	Rotate	Rotates a document 90º clockwise

	OCR	Captures the text from the document image
	Open or Close Panes	Opens or closes the image, text, metadata, and thumbnail panes
	Help	Opens the help window

OPTICAL CHARACTER RECOGNITION

Laserfiche can be configured to automatically use the Optical Character Recognition (OCR) software to extract text from documents, as they are scanned or imported. This allows them to be indexed and added to the repository for searching.
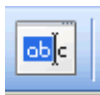
Because the OCR is about 85% accurate, you can change errors in the text window by clicking on the button to activate the **Text** window and edit text as needed.

ANNOTATIONS

Laserfiche allows users to add Annotations to a document. Annotations do not change the original document; they add a layer on top of the actual document. The most commonly used Annotations are Highlight, Redaction, Stamps and Sticky Notes.

You can add the most common annotates to a Laserfiche document by using the following buttons on the toolbar:

Stamp	Sticky Note	Highlight	Redaction

Note: After adding an annotation to a document Laserfiche will prompt you to save the current page before you move to another page in the document.

STAMPS

Frequently used stamps are installed with Laserfiche. You can create new ones by importing monochrome bitmap files.

TO ADD A STAMP

1. Open the desired document
   Make sure the Image pane is open

2. Click on the *Stamp* button

▶ This opens the Stamp Manager window
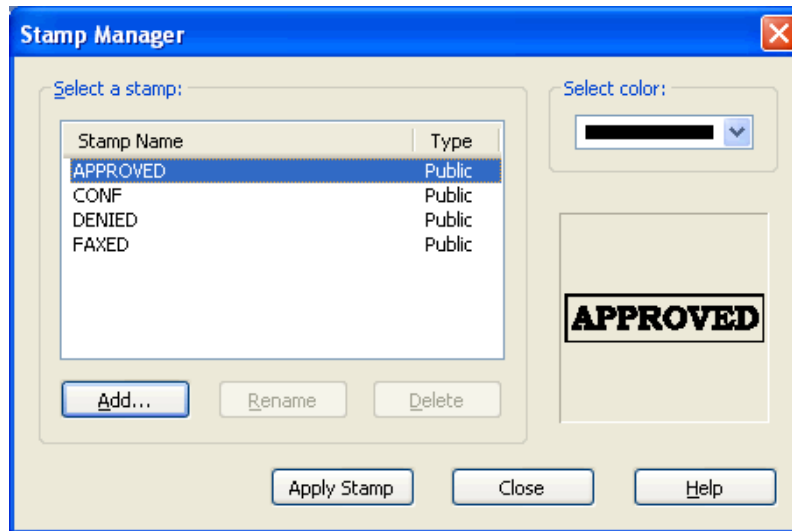
3. Select the desired **Stamp** from the list

4. Select the desired color for the **Stamp**

5. Click **Apply** Stamp

   ▶ This closes the stamp manager button

   ▶ The cursor will change to the stamp icon

6. Click on the **image** to place the stamp where you would like it to appear

7. Save the document

Note: You can click on and drag the Stamp to another location after placing it, or click and hit the Delete key to delete it.

STICKY NOTES

Like sticky notepads or post-it-notes, you can attach a Laserfiche Sticky Note anywhere on a document without changing the document itself. You can also search for text within Sticky Notes.

TO ADD A STICKY NOTE

1. Open the desired document Make sure the Image pane is open

2. Click on the **Sticky Note** button

The cursor will change to the *Sticky Note* icon

3. Click on the image where you would like the Sticky Note to appear

   ▶ The Sticky Note text window will open

4. Enter the desired text

5. Close the Sticky Note window by clicking its X in the upper-right corner

6. Save the document

Note: You can click on and drag the Sticky Note to another location after placing it, or click and hit the Delete key to delete it.

HIGHLIGHTS AND REDACTIONS
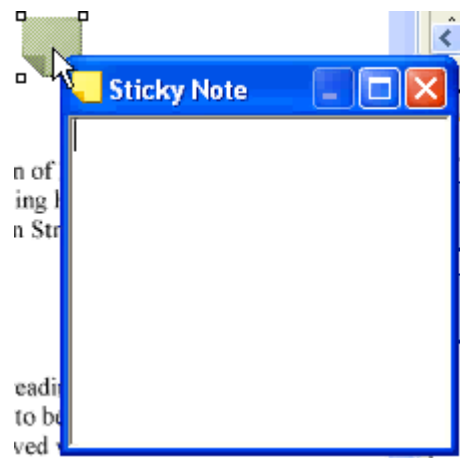
Users can highlight or redact areas of documents. The Highlighting and Redaction tools work essentially the same way. The main difference is that the redaction tool creates a gray "shadow" over the text in the image or text panes. If the actual image is printed or otherwise transmitted, the text is blocked out.

HIGHLIGHTING AND REDACTING TEXT

In the Text window, the tools highlight or redact text word by word. The corresponding text is also highlighted or redacted on the image.
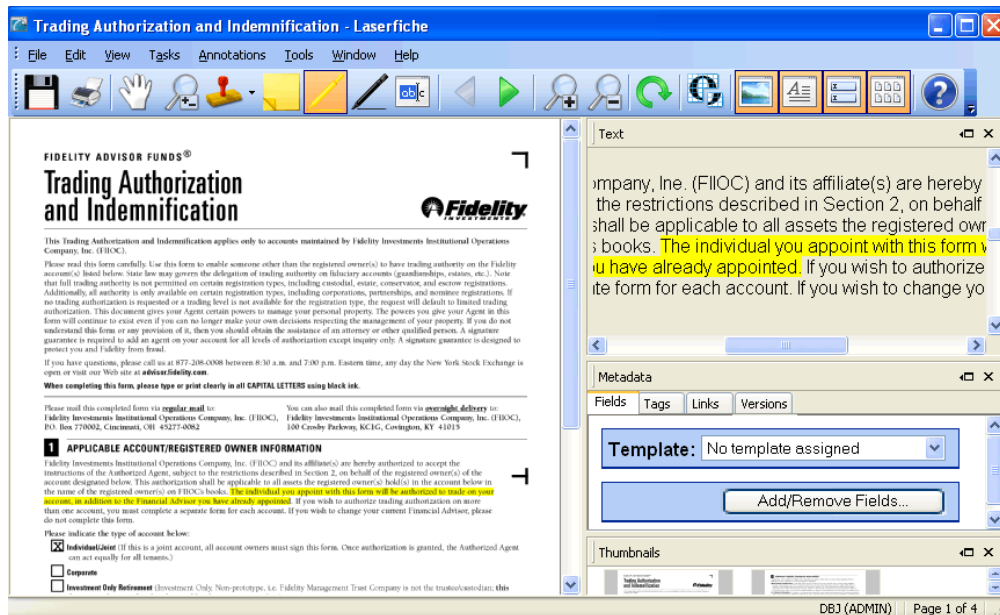
Users can remove highlights in the text window by selecting the highlighted text with the highlighting tool and hitting the Delete key.

HIGHLIGHTING AND REDACTING IMAGES

When highlighting or redacting the image, the tool highlights regions of the page rather than lines of text. Users click and drag the highlighting tool to select the highlighted region. These highlights can be moved or resized.

Users can remove highlights or redactions in the image by selecting them and hitting the Delete key.

TO CREATE HIGHLIGHTS AND REDACTIONS

1. Open the desired document

   ▶ Make sure the Image and Text panes are both open

2. Click on the **Highlighter or Redaction** button

   ▶ The cursor will change to the highlighter tool

3. Highlight the desired text in the text window

4. Click on the **Tool** button to return the cursor to normal

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To change the color of a highlighted or redacted section, right-click on the highlighted or redacted section and click properties.

Note: Redaction colors are limited to black or white.
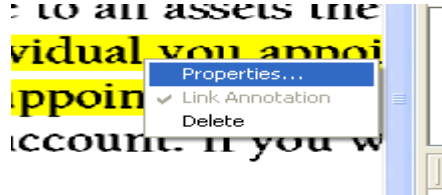
OTHER ANNOTATIONS

TO USE OTHER ANNOTATIONS

1. Click on the Annotation Menu within the documents window
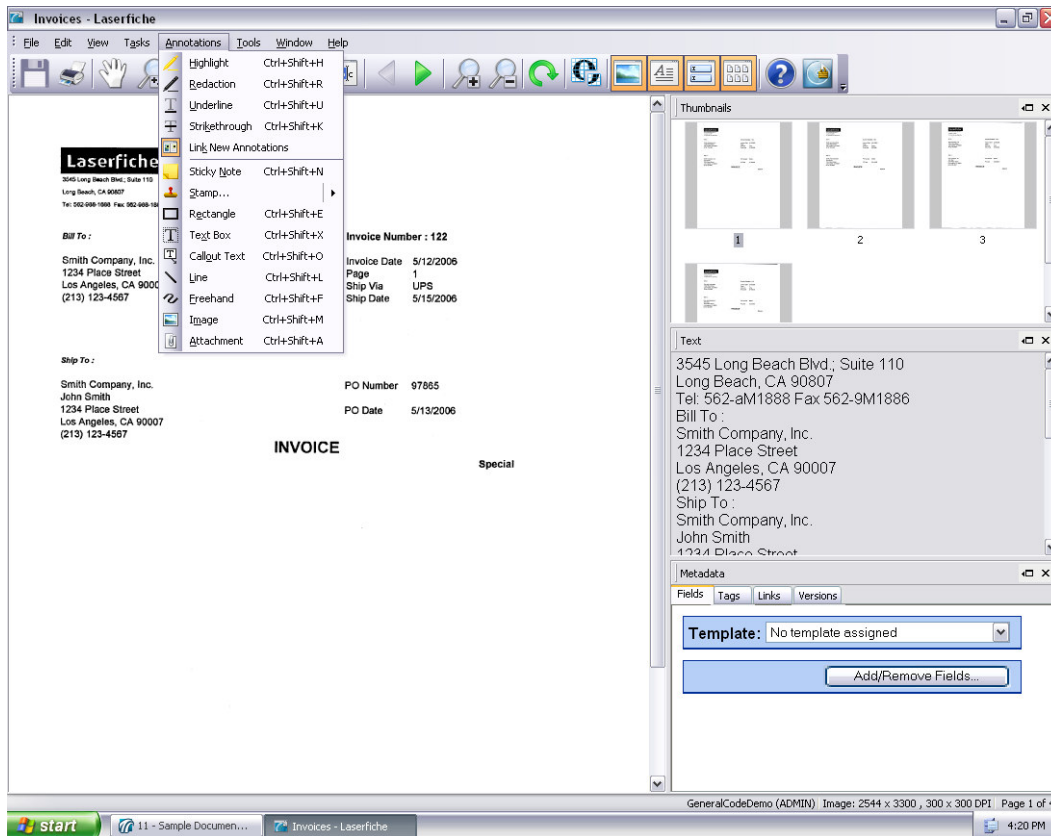
2. Click on the desired Annotation

Annotation	Name	Function
	Highlight	Allows a user to highlight a portion of a document or OCR'ed text
	Redact	Allows a user to block a portion of a document or OCR'ed text from view
	Underline	Allows a user to under line a portion of a document or OCR'ed text
	Strikethrough	Allows a user to strike through a portion of a document or OCR'ed text
	Sticky Note	Allows a user to place a note on a document
	Stamp	Allows a user to place a predefined stamp on a document
	Rectangle	Allows a user to place a rectangle on a document
	Text Box	Allows a user to place a text box on a document
	Callout Text	Allows a user to place a callout text box on a document
	Line	Allows a user to draw a line on a document
	Freehand	Allows a user to do free hand drawing on a document
	Image	Allows a user insert an image onto a document
	Attachment	Allows a user to add an attachment to a document

3. Click within the document to place the Annotation

From the Properties dialog box, select the new color and click *OK*.
Note that the Opacity can be changed as well as the color.
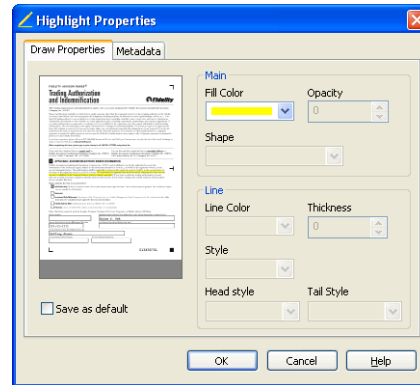
4. Save the document

Note: The Sticky Note, Callout Text and Text Box are searchable annotations

MOVING OR DELETING PAGES

Moving or deleting pages within a document or into another document is simple with drag and drop.

Note: To delete or move multiple pages, you can use the ctrl key or the shift key. Ctrl will allow you select multiple pages not in a row, for example click on page 2 hold the ctrl key and click on page 4, only page 2 and 4 will be selected. The shift key will select pages in a row, for example click on page 2 hold the shift key and click on page 4, pages 2, 3 and 4 will be selected.

TO MOVE A PAGE

Select individual pages or groups of pages in the Thumbnails window.
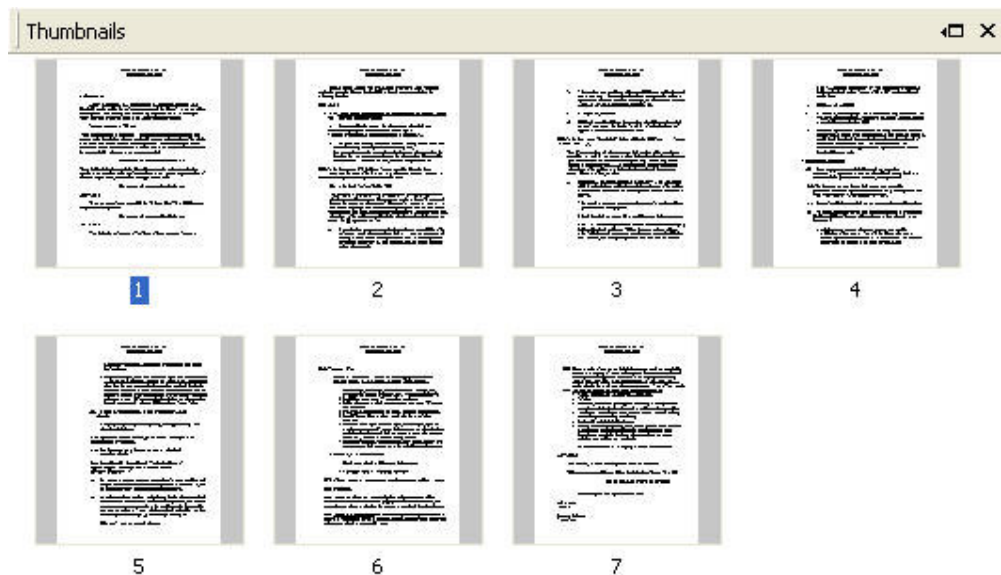
1. Click and drag the thumbnails, either individually or as groups, to the desired location

2. To remove pages, select the page or pages and hit the Delete key

3. Click **Yes** when Laserfiche prompts you to confirm the move or deletion

PERFORMING OCR

This step is necessary only for documents that were not OCR'd during the scanning process or while importing. Documents brought into Laserfiche with Snapshot can also be OCR'd during the process of scanning.

1. In the right-hand pane of the folder browser window, **select** the documents that you wish to OCR

2. Select all of the documents in a given folder by selecting the first one, holding down the Shift key, and selecting the last one

3. Select certain documents by holding down the CTRL key as you click on the desired documents

Note: You can select a set of documents by running a search for a group of documents and then selecting all or some of the documents from the Search Results screen in the same manner as above. Using the Has Pages search option can help you find documents that have not been OCR'd and indexed.

4. Click on the **OCR** button

5. In the OCR Window, select the **OCR / Extract Text** checkbox and use the appropriate radio buttons to indicate the pages you would like to OCR

6. Click **OK**
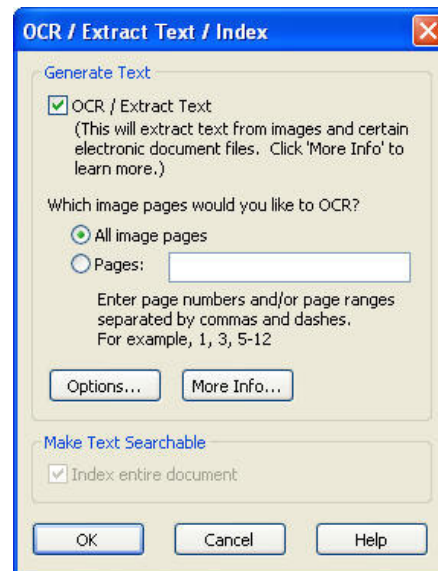
SCANNING WINDOW

WHAT IS IT?

In the Laserfiche Scanning window, you can set controls to modify how Laserfiche treats documents. Setting these controls once can save you time.

PROCESSES

Processes are additional functions available when you scan documents into Laserfiche:

One process within Laserfiche Scanning is - **OCR (Optical Character Recognition)** converts the text on hard-copy documents or document images into text that you can edit in Laserfiche, bring into word processing applications, such as Microsoft Word, or add to e-mails.

ENHANCEMENTS

Enhancements are modifications to scanned images to improve their appearance and / or increase OCR accuracy. Enhancements may be needed because of the quality or appearance of the original document or due to scanner settings.

While some processes can be done anytime with a captured image file, enhancements must be selected before the image is scanned.

Enhancements within Laserfiche Scanning:

Border Removal	Border Removal lets you remove a border from the image by cropping it or changing it to white space.
Color Smoothing	Color Smoothing averages the background color of an image to reduce the total number of colors used in an image. This produces a cleaner image to improve image clarity with a smaller file size.
Dynamic Thresholding	Dynamic Thresholding converts images to black and white format.
Border Padding	Border Padding adds a border around the current image.
Crop	Cropping removes a specified border around the image
Deskew	Deskewing straightens images that have been scanned at a slight angle, usually because the paper was fed at a slight angle or not positioned correctly on the flatbed.

Despeckle	Despeckling removes small marks on the image. Users may have to adjust the Despeckle setting to avoid removing punctuation marks or other document elements.
Invert	Invert reverses the colors on an image. Inverting the colors converts white text to black text, which produces better OCR results.
Line Removal	Horizontal and / or vertical lines from forms or other printed items can be removed so they do not cause errors in the OCR scan.
Photo Correction	Photo Correction removes the background of a document image and straightens the photo as it appears on a page.
Resize	Resize adjusts the size of an image by specifying the desired image dimensions, percentage, or resolution (expressed in dpi).
Rotate	Rotate adjusts images so they appear with the correct orientation, regardless of how they went into the scanner.
Smooth	Smooth enhances images by growing, shrinking, or smoothing out pixels for added legibility or to improve OCR accuracy.

Selecting any of these enhancements, opens a pane where you can specify the specific settings you want to use.

TO SCAN A DOCUMENT

1. Select the folder where you would like to store the new document

2. Click the *Scan* button to open the Laserfiche Scanning window

3. Under *Document Properties*, name the document

4. Under *Default Folder*, ensure that you are scanning to the correct folder

SPECIFY TEMPLATE PROPERTIES

1. Under the *Fields* tab, select the desired template for the documents you are about to scan

2. *Enter* the desired data into the appropriate fields

3. Specify additional image processing options, if desired by selecting Image Processing in the left-hand pane

   Note: If the process you want is already listed under Image Processing, do not list it again.

4. In the right-hand pane, select Omnipage OCR to automatically OCR every scanned page

5. In the right-hand pane, select Page Removal to automatically remove blank pages

Note: The file size setting for the Page Removal process is scanner dependent and may need to be adjusted. The key is to make the size large enough that it removes all blank pages, but small enough to ensure pages with only one line of text are not removed.

6. In the right-hand pane, select Laserfiche Rotate to have Laserfiche automatically determine the correct orientation of scanned images

7. Click the Start Scanning button

8. Review your scanned documents:

Note: Each scanned page will be listed in the left-hand pane. The selected page is displayed in the center pane. You can page through them using the Forward and Back buttons or by selecting the thumbnail in the lower left-hand pane.

9. Make any desired corrections

10. Click Store Documents to store the documents in the designated Laserfiche folder

11. Click the Refresh button to see the new file listed in the directory

DOCUMENT PROPERTIES

The **Document Properties** pane is where you can set additional options for scanned documents. There are three tabs in the **Document Properties** pane:

▶ **Fields** is where you attach the desired template and add metadata to facilitate finding for the document during searches.

▶ Tags are used by some organizations to indicate access to documents or provide additional information.

▶ The Settings tab allows you to select the default folder where Laserfiche will save scanned documents. This also allows you to set the standard document length when batch-scanning, as well as assigning names to a group of similar documents.

BATCH SCANNING

WHAT IS IT?

Batch scanning lets you scan a group of documents at one time, then name, split and organize them before they are stored in the Laserfiche repository. This is especially useful for offices that process a large numbers of documents using a high-volume scanner.

If the documents will use the same template, you can fill in the fields before scanning and modify them later as needed.

TO BATCH PROCESS A GROUP OF DOCUMENTS

1. Scan the documents
   ▶ Do not save the large document that opens up

2. Review the document in the Thumbnails and Image panes

3. Review the document page by page with the Forward Arrow button

4. Select *Create New Document* from the File menu (or hit CTRL+D) at the first page of each new document

   ▶ A duplicate name will appear in the Revision Pane
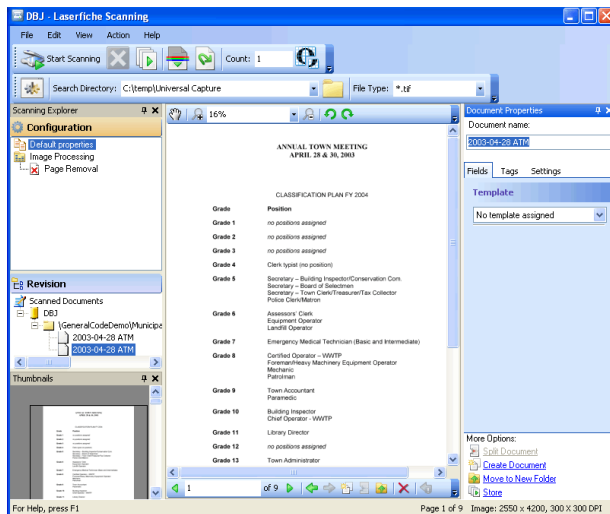
5. Rename the document and change template information as needed, then click *OK*

   ▶ As soon as you create the new document, the pages are removed from the original Laserfiche document

6. When finished, click Store Documents to save them all to the Laserfiche repository

You can also create new documents from existing ones by selecting the pages you want to save as a new document in the Thumbnails pane. Select multiple pages by:

▶ Shift-clicking on the first and last pages in a series

▶ Dragging to select a group

▶ Control-click to select non-contiguous pages

With the pages selected, right click on one of the pages and select **Create Document** from the drop-down menu. A window will appear asking if you wish to create a new document from the selected pages. Select **Yes** and edit the name and template information as necessary.

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USING HELP

WHAT IS IT?

The Help database in Laserfiche lets you find information onscreen from within Laserfiche.

ACCESSING HELP

Help is available through the Help Menu, by clicking the Help Icon, or by hitting the F1 key

▶ Using the F1 key will open the Help window for the current view and cursor location. For example, if the cursor is in the Text pane of the Document window when you hit F1, the help window will open with information about the Text pane.

Opening Help from the menu bar opens the main **Laserfiche Help** window, which has three tabs:
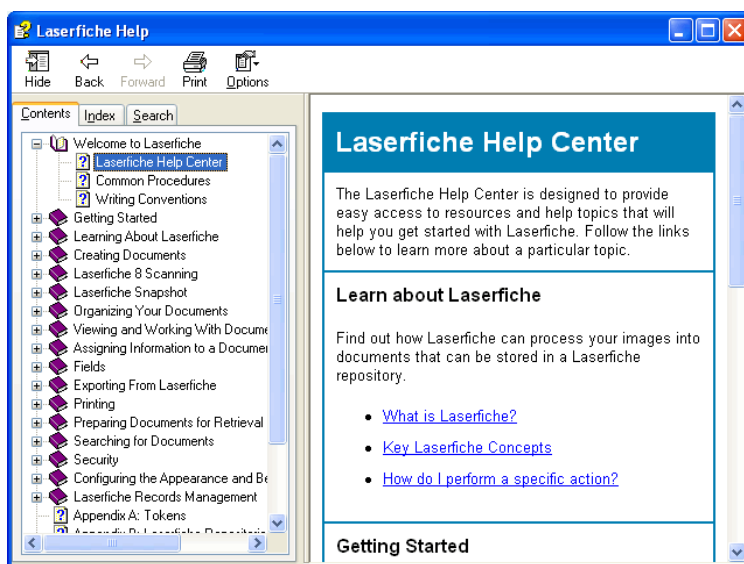
▶ The *Contents* tab allows the user to browse for the information needed

▶ The Index tab lists page contents alphabetically. Users can type the term they are looking up and the screen moves to that item

▶ The *Search* tab searches for relevant help entries for the search term entered in the box.

SNAPSHOT

WHAT IS IT?

Laserfiche Snapshot is a utility used to generate images and text from an electronic file. This eliminates the need to print electronic documents and scan them into Laserfiche. Snapshot can process any electronic document that can be opened with a windows application with printing capabilities.

Snapshot generates an image of an electronic document (saved as a .tif file) that users can view and work with as if they were scanned from a hard copy.

Snapshots are generated from the original document application (such as Microsoft Word or PowerPoint) through the *Print* function by selecting Laserfiche Snapshot 8 in the printer box.

Snapshot can be configured to automatically perform OCR and index the document.

TO CREATE A SNAPSHOT
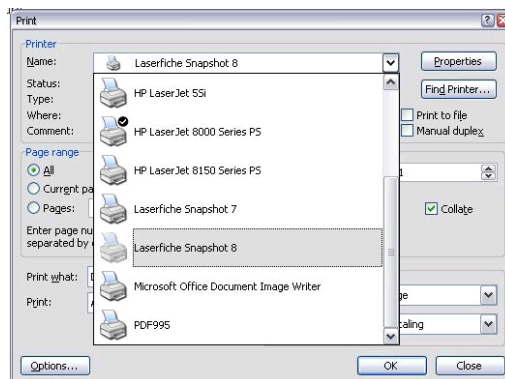
1. *Open* the document in its native application

2. Click *File* > *Print*

3. In the Print dialog box, select **Laserfiche Snapshot 8** under Printer Name

   ▶ This may be listed as **Lf Snapshot 8**

4. Click *OK*

5. On the *Repository Login* screen, select your repository and enter your Login information

6. Click *OK*

   ▶ This reveals the Laserfiche Snapshot screen.

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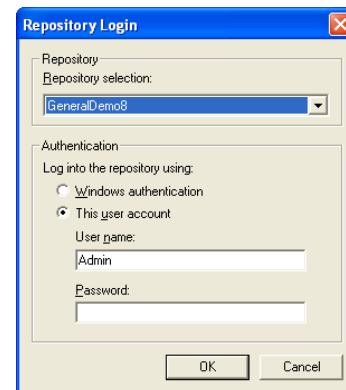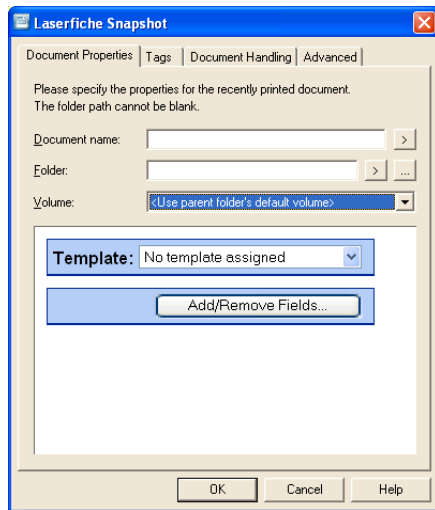
7. On the *Document Properties* tab, enter a document name

8. Select the *Laserfiche* folder where you would like to document to be stored

    ▶   The *Ellipsis* button opens a window you can use to browse the repository

9. Select the desired template from the drop-down menu

10. Fill in the desired template data

11. Click on the *Advanced* tab and, under *Text generation*, click *Perform OCR* on the images created for the print job.
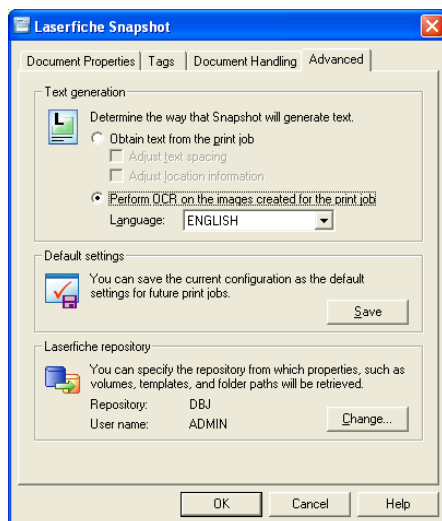
12. Click *OK*

Note: You can configure Laserfiche to Snapshot documents into a specified folder with a default volume and template so that you do not have to enter this information each time.

IMPORTING

WHAT IS IT?

The Import function brings electronic files into the Laserfiche. When a document is imported, users can enter data into template fields, add tags, index text, and search for it as with any Laserfiche document.

Imported documents are created in the folder currently selected in the Document window. A folder must be selected to access the Import option from the File menu.

IMPORTING TIFF FILES

Imported tiff (.tif) files become Laserfiche documents and can be stored, annotated and OCR'd as if they were scanned into the repository. They appear in Browser and Search windows just as any Laserfiche document.

NATIVE FORMAT DOCUMENTS

Imported non-image files, such as Microsoft Word, Excel, or PowerPoint documents remain in their native format. However, the version in Laserfiche is separate from the original. Any changes made to the file in the Laserfiche repository are not saved in the original document, and vice versa.

When these files are imported into Laserfiche, they remain in their native format, as a new copy in the Laserfiche repository. They display in the Laserfiche browser window with the icon of their native program.

These imported files can be opened two ways:

 ▶ Double-clicking and selecting Open > Electronic file from the pop-up menu launches the native program in a new window. You can work with the document as usual, and save changes to the Laserfiche copy only

 ▶ Right-clicking and selecting Open > Pages from the pop-up menu opens the document in the usual Laserfiche Document window. You can work with it as any Laserfiche document, although it does not exist as a separate Laserfiche document

TO IMPORT A DOCUMENT

1. Open the document in its native program and make sure it appears as you want it

 ▶ Make sure you save any changes to the document before importing it into Laserfiche

2. Close the document

3. Open Laserfiche and select *File > Import*…
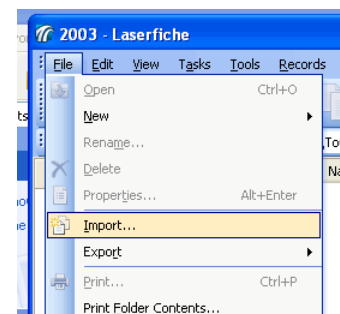
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▶ This opens the Import to Laserfiche window

4. Under the *General* tab, you can:

▶ Change the document name if desired

▶ Click the *Browse* button to select the location where the imported file will be stored

▶ Select *Extract text from electronic document* to run OCR and index the document
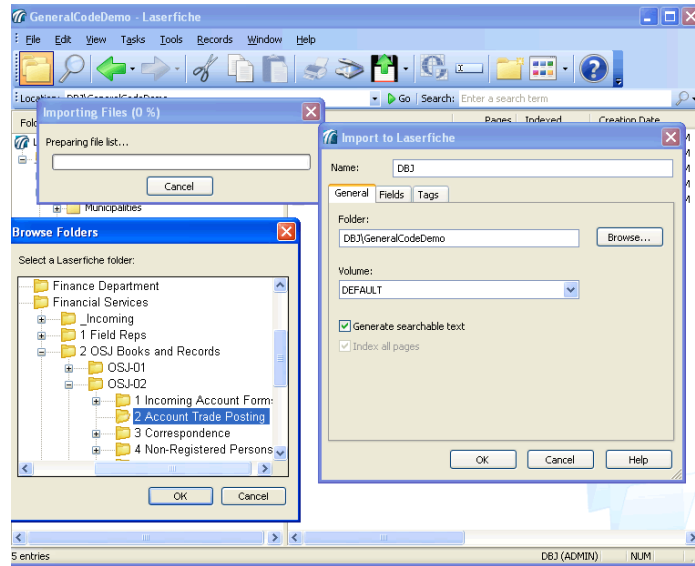
5. In the *Fields* tab, select the template and enter any Template data

6. Click *OK*

BEST PRACTICES FOR NATIVE FORMAT DOCUMENTS

While Laserfiche gives you the ability to bring other types of documents into the Laserfiche repository, in practice this usually is not recommended because:

▶ Laserfiche cannot track changes made to either the original or imported version of the document

▶ When a Laserfiche user opens the document, the native program opens

Example: If the document is a Microsoft Word document, then it will open in Microsoft Word, however if you do not have Microsoft Word on your computer, you will not be able to open the document in its native format.

BROWSING

WHAT IS IT?

Browsing is the process of opening and exploring the contents of Laserfiche in the **Folders** view, instead of using the Search command to locate a document.

When you look for a document by browsing, the need for clear folder structure and naming conventions becomes apparent. The process itself is simple, but only when there is a clear path to follow.

TO FIND A FOLDER BY BROWSING

1. The Folder browser window works like the browser in Windows Explorer. The top level is the repository name.
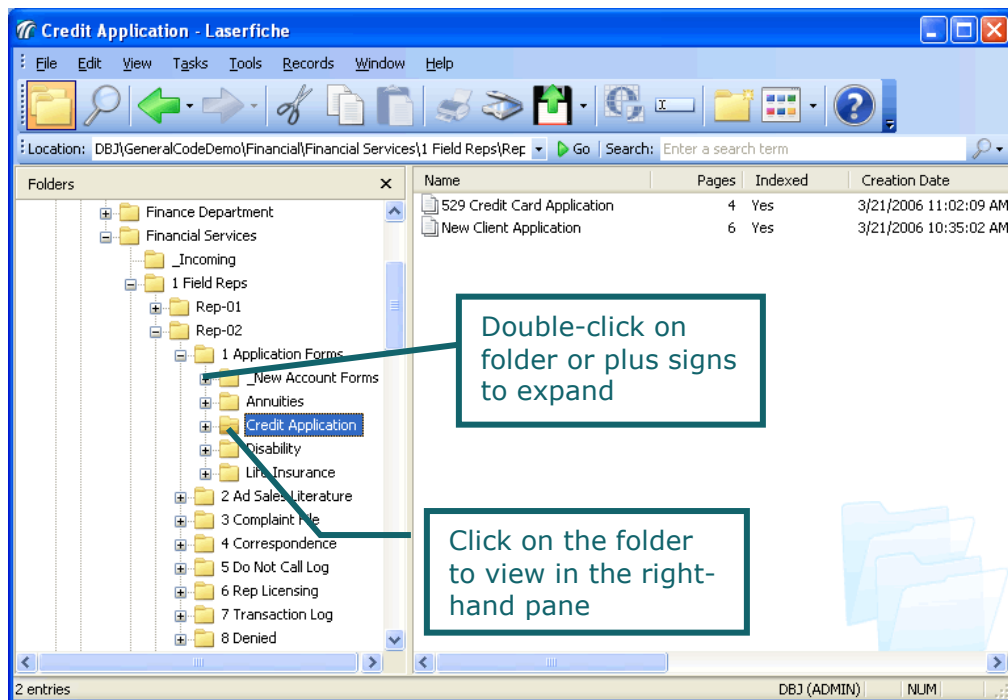
2. The levels beneath it are designated by folders

   ▶ Clicking on a folder in the left pane displays its contents in the right pane

   ▶ Clicking in the plus sign (+) expands the folder view for the next level down

3. The left pane shows only folders and last search, not individual documents

4. Double clicking on a folder in the right pane displays the contents of that folder. On the left, the folder list expands to show that folder

OPEN DOCUMENTS

WHAT IS IT?

When you open a Laserfiche Document it will open in its own window. This is window allow you to view the document as well as work with it.

MOVING AROUND IN A DOCUMENT

There are several ways to move around a Laserfiche Document:

IN THE THUMBNAILS PANE:

▶ Double-clicking on a thumbnail opens that page in the Image pane

▶ *CTRL + Page Up* and *CTRL + Page Down* moves from page to page

▶ If there is multiple occurrences of highlighted text from a search, *F3* jumps to the next occurrence

IN THE TEXT PANE:

▶ If there is highlighted text from a search, N jumps to the next occurrence while P jumps to the previous occurrence.
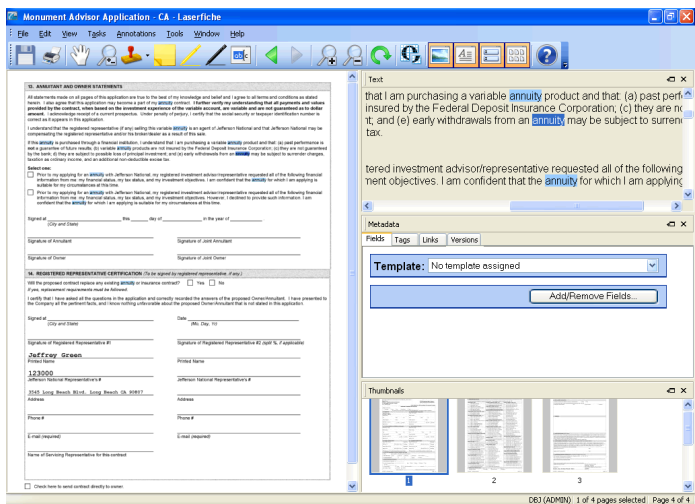
IN THE IMAGE PANE:

You can zoom into a section of a page by clicking on the image and dragging the cursor to enlarge that section. You can then use the panning tool to move the image in the window.

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SEARCHING

WHAT IS IT?

One of the most powerful features of Laserfiche is its ability to search the entire repository for a document using up to 14 separate search criteria's. Advantages of the Laserfiche search function include its flexible search criteria and the ability to save commonly used searches.

Searching allows you to find the documents within Laserfiche quickly and easily.

Search is always available by clicking on the magnifying glass button on the Browser window toolbar. This opens the *Search Window*.
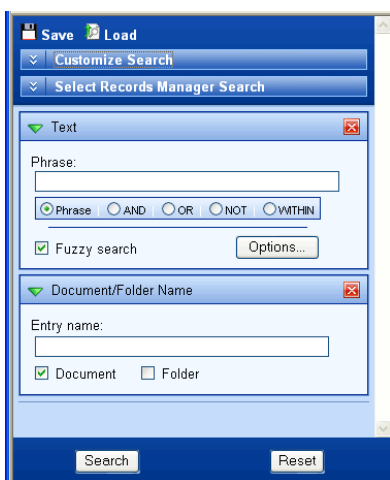
After the search is completed, documents matching the search appear in the **Documents** pane.

Note: When the user return to the Search window, options selected earlier will appear.

Clicking on the *Reset* button at the bottom of the Search pane will close any search windows and open the text search window.

QUICK SEARCH

Laserfiche "Quick Search" searches OCR Text, Entry Names, Fields and Annotations without having to open the search pane. Quick Search does a simple search of the phrase typed with in the *Search Box* on the **Navigation Bar**.
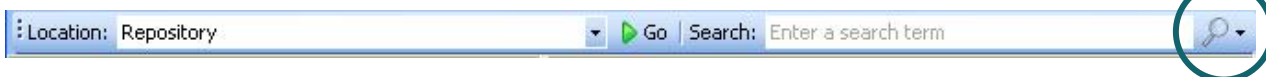
TO DETERMINE WHAT TEXT IS SEARCHED

1. Click on the drop down arrow

2. Select items to search

   ▶ **Note:** You can select multiple items in the list to be searched. If the item is checked as in the example here, it will be searched.
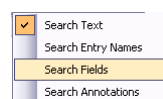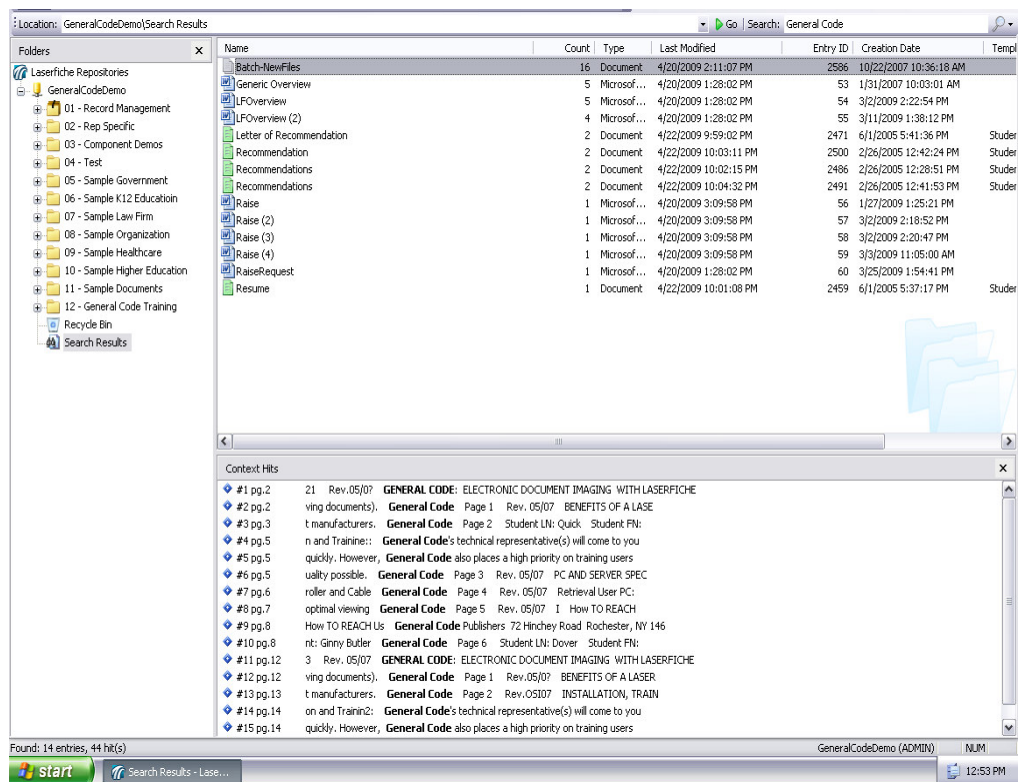
STANDARD SEARCH

1. Click the *Search* button on the toolbar

2. If **Text** is not already displayed in the Search pane, click *Reset* at the bottom of the pane

   ▶ You can also click the down arrow button on the **Customize Search** bar and select *Text*

3. Enter the word or phrase you would like to search for into the box

   ▶ Asterisks (*) work as wildcard characters

4. Click *Search*

   ▶ Search results will display in the top portion of the right-hand pane

   ▶ Lines of context from the document selected in the results appear on the bottom half of that pane
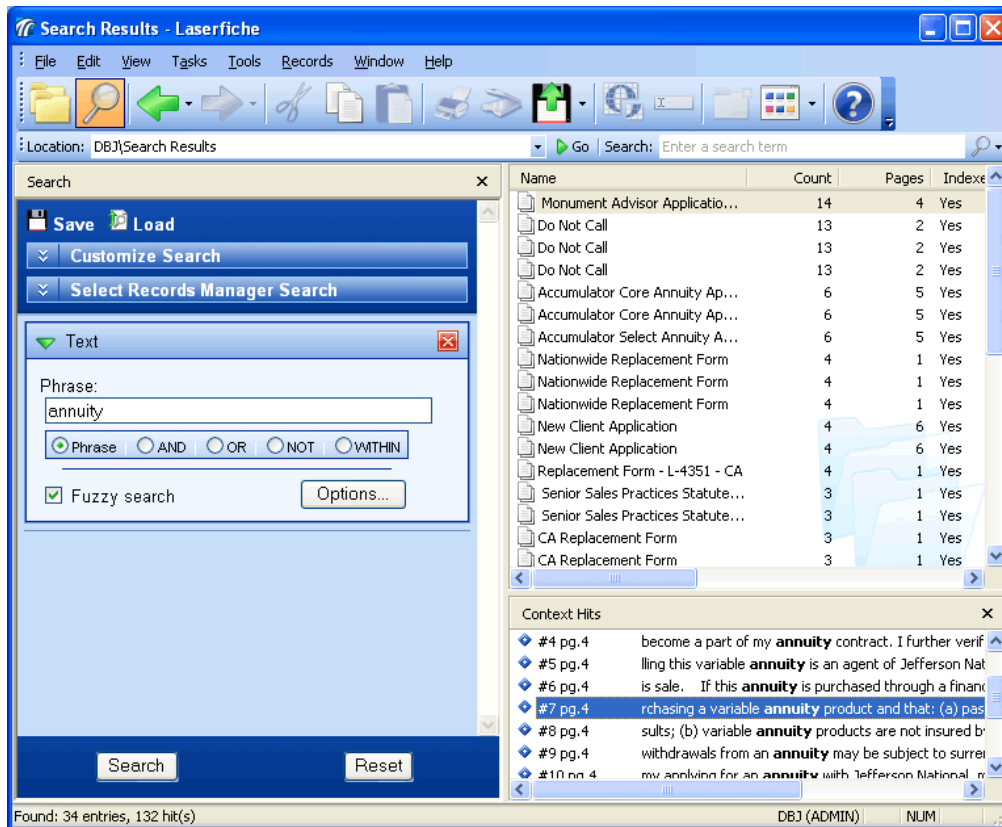
Double-click on the desired document in either pane to open the document

ADDITIONAL TEXT SEARCH FEATURES

You can use any of these to modify your search parameters

AND	Searches for a word or phrase AND a second word or phrase in the same document.
OR	Searches for a word or phrase OR a second word or phrase in a document.
NOT	Searches for a word or phrase in a document where a second indicated word or phrase does NOT exist.
WITHIN	Searches for a word or phrase WITHIN a designated number of characters, sentences, or paragraphs of another word or phrase. Selecting WITHIN opens a sub-window to select the parameters of the search.
FUZZY SEARCH	Searches for words or phrases substantially similar to the entered word or phrase. You can set the criteria to indicate either how many letters or what percentage of the word can be different from the sought-after word. This feature compensates for spelling errors, OCR text errors, or if you are not sure of a correct name spelling.

BASIC SEARCH

Basic search allows you to search all text items: the user has the option to search Document Text, All Fields, Entry Names and Annotation Text.

1. Check the check box of items to search

2. Type in Phase to search

   ▶ Remember all text searches within Laserfiche are literal except Annotation Text

3. Click on Search
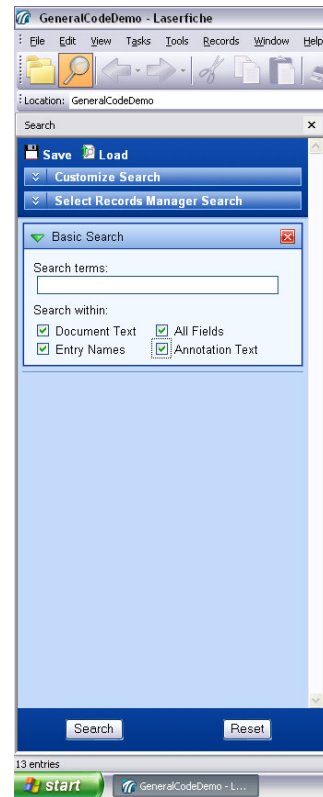
OTHER SEARCHES

Search type	Finds…
Within Folder	Limits the search to a specific folder. Clicking the ⬚ button opens a browser window to select the desired folder
Field	Searches on information contained in a template field. Users select the desired template from the drop-down menu and then fill in the appropriate fields with the search text
Modification Date	Searches by the date the document was modified. Users can enter a date or date range, or select dates from a calendar
Document / Folder Name	Searches for the name of an entry or a portion of the name using wildcards
Electronic Documents	Searches according to whether files are Laserfiche or have been imported from another application, and can limit searches to specific types of imported files (Microsoft Word, PowerPoint, Excel, or Adobe Acrobat)
Tags	Searches for documents that were assigned tags
Relationship	Searches for documents that have multiple versions; this can be limited by the type of relationship: Supersedes or Superseded by
Version	Searches for documents with multiple versions
User	Searches for documents scanned by a specific user
Within Volume	Limits the search to one volume
Has pages	Limits search according to pages that have or have not been OCR'd
Advanced	Allows the user create specific searches with a syntax

Note: If you search by template or field data, the results will display columns for each field in the template.

TO SEARCH FOR TEXT WITHIN A DESIGNATED FOLDER

1. Click the *Customize Search* down arrow button and select Within Folder

   ▶ Both the Text Search and Within Folder search panes should be displayed

2. Under Within Folder, select the folder within which you wish to search by clicking on the **Browse Button** and selecting the folder from the file directory

3. Make sure that the Search Subfolders checkbox is checked if you wish to search within subfolders of that folder

TO SEARCH FOR A DOCUMENT USING TEMPLATE DATA

1. Click the **Search** button on the Toolbar

   ▸ Click **Customize Search** and select **Field**

   ▸ Select the Template on which you would like to search

2. Enter the data you would like to search for into the box following the appropriate field or fields

3. Click **Search**

4. The search results will display in the right-hand pane

5. Double-click on the desired document to display the document
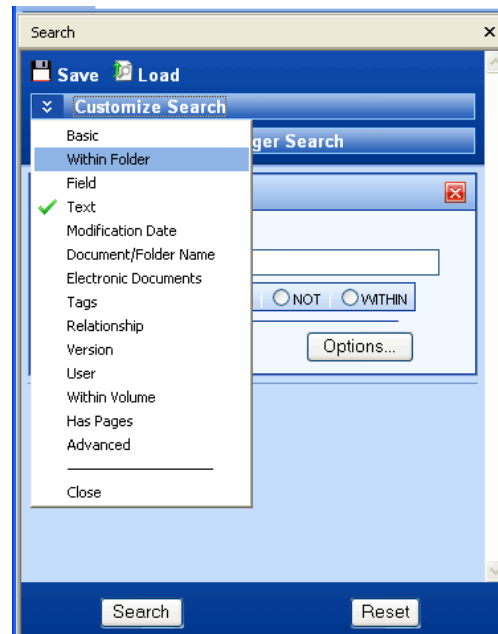
TO SEARCH BY STICKY NOTES TEXT

1. Click the **Search** button on the Toolbar

2. Click **Customize Search** and select **Basic**

3. Enter the word or phrase you would like to search for into the box

4. Ensure the Annotation Text box is checked and click Search

5. The search results will display in the top portion of right-hand pane. The text or a portion of the text of the Sticky Note will display on the bottom half of that pane

6. Double-click on the desired document to display the document

Note: When performing a search, be sure to close any panes for search types that you are not using. If you have multiple search types open, Laserfiche will automatically search using all of the criteria listed.

TO SORT SEARCH RESULTS

1. To sort a set of search results or a list of documents displayed in the right-hand pane, determine the column on which you would like to sort and click on the column heading for that column

2. If the column that you want to sort by is not displayed, right-click any column heading and select the column heading that you want to display
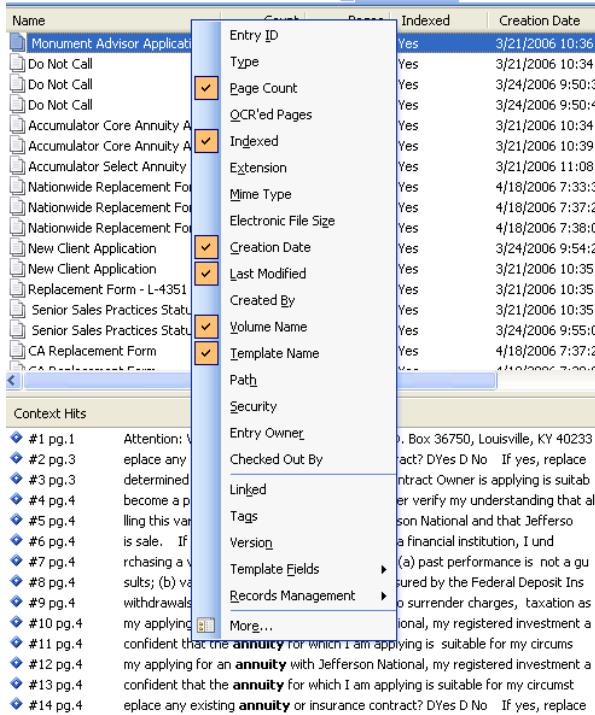
TO SAVE SEARCH CRITERIA

1. Create the search with the criteria you want to repeat
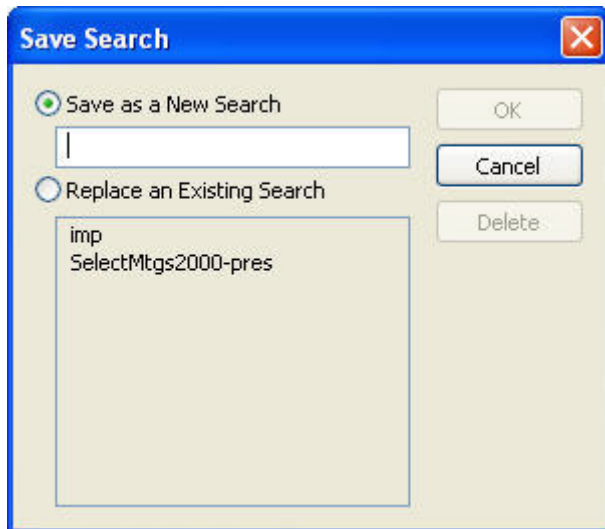
2. With this search criteria displayed in the left-hand pane, click on the Save button at the top of the left-hand pane

   ▶ This opens the **Save Search** window

3. Enter a name for your saved search in the top box

4. Click **OK**

Note: Remember all saved searches are global, meanings all users can see them and use them

TO LOAD A SAVED SEARCH

1. At the top of the Search Panel, click on the *Load Saved Search* button

2. Select the name of the search you wish to run

3. Click *OK*

   ▶ This will display the saved search criteria

4. Click the *Search* button to run the search

PRINTING

WHAT IS IT?

Printing allows you to create a hard copy of any document in the repository. Laserfiche lets you print files in two ways:

▶ The images of the official documents

▶ Text of the documents as derived through OCR and edited

Laserfiche also makes it easy to print both versions at the same time. The Print What menu in the Print dialog box lets users select what they want.

PRINTING IMAGES

Selecting images prints the document as it appears in the image pane of the document window.

PRINTING DOCUMENTS

1. Click on the *Print* icon on the toolbar

2. Click the *Options* button to open a window to select how to print the image by including or excluding:

▶ Highlights (Other annotations)

▶ Stamps (Other annotations)

▶ Sticky Notes

▶ Redactions

3. The default option is to print out the image at its actual size, but users can elect to fit to paper or only print a selected section of the document
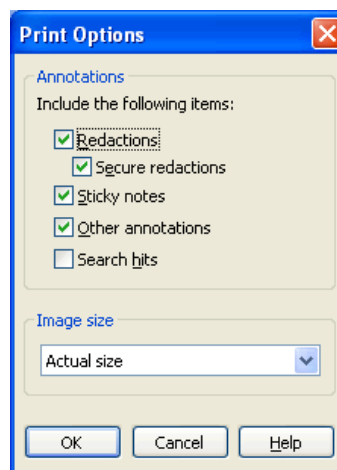
Note: Sticky Notes do not print on the actual document. Instead, a separate sheet prints with the text of the notes, numbered if there is more than one.

PRINTING TEXT

The process for printing text is the same, with the same options available.

Note: Redactions and highlights will only print as they appear in the text window. Highlights and redactions made on the image will not appear on the printed text.

When printing images or text, you should keep in mind that security (access rights) will ultimately determine whether you will print redacted material and whether annotations will be included.
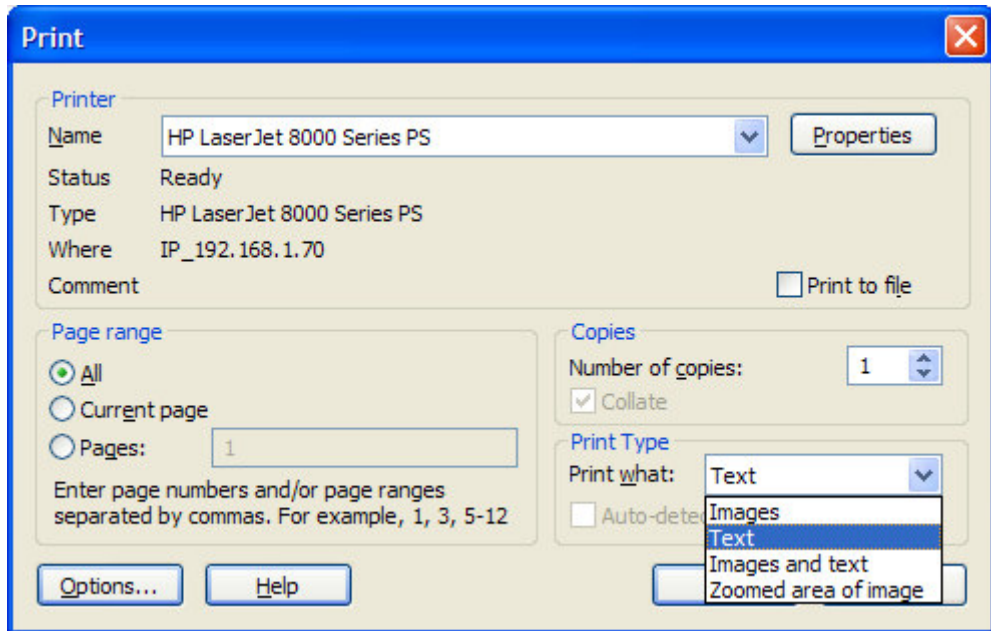
EXPORT

WHAT IS IT?

The Export function saves a Laserfiche document as a file in a different format that can be opened by people who do not have access to Laserfiche.

▶ Images can be exported as an image file, such as a .tif or .jpg, that can be opened by a graphics users in Windows, or as a PDF file that can be opened in Adobe Acrobat

▶ Text can be exported as a .txt file that can be opened in Word or another word processing application

EXPORT TO FILE

The Export command is under the File menu in both the **Folder Browser** and Document windows.

TO EXPORT A DOCUMENT

1. Select File > *Export* > *Images*

   ▶ This opens the **Export Images** dialog box

2. Name the document; determine where the file will be saved, and the type of file to create
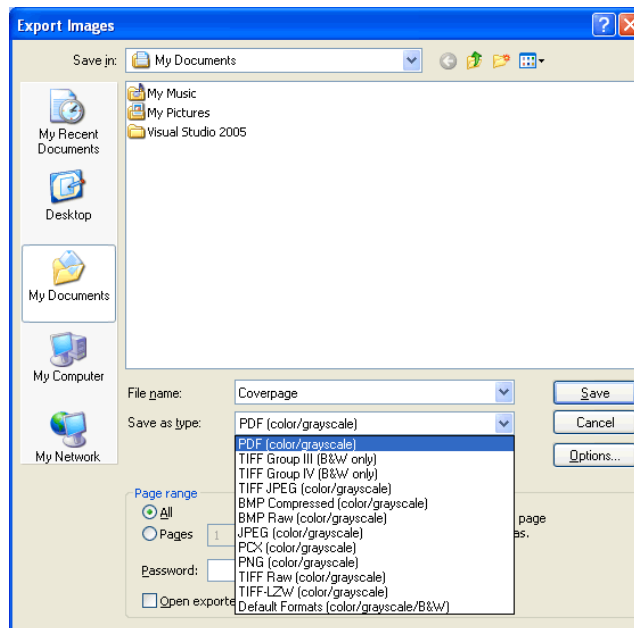
The process for saving a text file is the same, after selecting *File* > *Export* > *Text* from the menu bar. There is no option for the type of file to create.

When working in the Folder Browser window, users can export multiple files at once by selecting them in the right-hand pane of the document window and select *File* > *Export*.

When a you use this method, Laserfiche automatically saves the files with the same names as the Laserfiche documents.

EXPORT TO E-MAIL

Laserfiche E-mail allows you to send e-mail messages containing Laserfiche documents and electronic documents as attachments. Recipients do not need to have Laserfiche installed to view documents or electronic documents that have been included as attachments to a message. They simply need to have the appropriate software installed to view the attachment that you have sent.

TO E-MAIL LASERFICHE DOCUMENTS

1. In Laserfiche, select the document(s) that you wish to e-mail

2. Click *Tasks* > *E-Mail Document*…

3. Select the format in which you would like to send the document(s)

4. If you are sending a large file or multiple files and wish to zip them prior to sending, click on the *E-Mail Settings* Button and check *Combine Attachments* into One Zip File

   ▶ If you need to ensure that your e-mail is under a certain size, click on the *E-Mail Settings* Button and check Warn When Attachments are Greater Than and indicate the desired size

5. Click *Create E-Mail*

6. Address and title the e-mail and add any desired message

7. Click *Send*

APPENDIX: SHORTCUTS

PROGRAM SHORTCUTS

Shortcut	What it does…
CTRL + P	Print the document
CTRL + X	Cut the selected item or text
CTRL + C	Copy the selected item or text
CTRL + V	Paste the last copied or cut item
DEL	Delete the selected item or text
F2	Rename the selected item
F5	Refresh

FOLDER BROWSER WINDOW SHORTCUTS

Shortcut	What it does…
CTRL + SHIFT + B	Open a new Folder Browser window
CTRL + B	Open the Folders pane
CTRL + F	Open the Search pane

DOCUMENT WINDOWS SHORTCUTS

Shortcut	What it does…
CTRL + 1	Show or hide the Image pane
CTRL + 2	Show or hide the Text pane
CTRL + 3	Show or hide the Fields pane
CTRL + 4	Show or hide the Thumbnails pane
CTRL + S	Save all changes made to the current document
CTRL + D	Create a new document from selected thumbnails

DOCUMENT NAVIGATION SHORTCUTS

Shortcut	What it does…
CTRL + PAGE UP	View the previous page in the document
CTRL + PAGE DOWN	View the next page in the document
P	Jump to the previous occurrence of a search result in the current document
N	Jump to the next occurrence of a search result in the current document

IMAGE VIEWING SHORTCUTS

Shortcut	What it does…
CTRL + + (Plus)	Magnify image to 2X
CTRL + - (Minus)	Reduce image to ½ X
UP ARROW	Scroll up
DOWN ARROW	Scroll down
LEFT ARROW	Scroll left
RIGHT ARROW	Scroll right
PAGE UP	Scroll up by one window length
PAGE DOWN	Scroll down by one window length

HOME	Scroll to the top of the image
END	Scroll to the bottom of the image

ANNOTATION SHORTCUTS

Shortcut	What it does…
CTRL + SHIFT + H	Highlight
CTRL + SHIFT + R	Redact
CTRL + SHIFT + S	Stamp
CTRL + SHIFT + N	Sticky Note
CTRL + SHIFT + T	Edit Text

REVIEWING SHORTCUTS

Shortcut	What it does…
ALT + UP ARROW	Select the previous page (image) in the tree
ALT + DOWN ARROW	Select the next page (image) in the tree
ALT + LEFT ARROW	Select the previous document in the tree
ALT + RIGHT ARROW	Select the next document in the tree
ALT + SHIFT + LEFT ARROW	Select the previous document containing invalid field data
ALT + SHIFT + RIGHT ARROW	Select the next document containing invalid field data
CTRL + D	Create a new document by splitting the existing document starting at the currently selected page

HELPDESK

Please contact General Code for technical support if users have any problems or questions about Laserfiche.

BY PHONE

Contact the Laserfiche help desk at *800-836-8834*

The Help Desk is open from 8:00 AM to 5:00 PM (Eastern Time), Monday through Friday

BY EMAIL

Write to *lfsupport@generalcode.com*