Laserfiche 8

Web Access Quick Start

Laserfiche

Welcome to Web Access

Web Access is an ASP.NET 2.0 Web application allowing you to store, organize, and access your organization's information using a Web browser. You have complete control over the documents and folders stored in your Laserfiche repository. Web Access also allows you to create, modify, or delete content.

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 Web Access.

Document:
Web Access uses the term "document" to refer to an imaged document or an electronic document.

Field:
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 Web Access 8.

Getting Started

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

If a repository has been previously created, it will be listed in this drop-down menu.

Laserfiche®   Run Smarter™

Select the repository to log into from the available list

Repository: MyRepository

Username:

Password:

☐ Use Windows Authentication

Login

You can log in using Windows authentication or by specifying a Laserfiche username and password.

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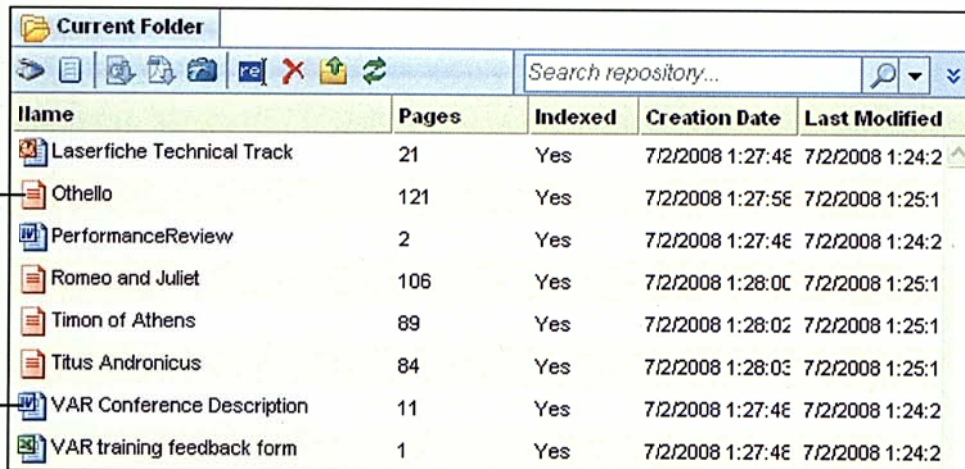
The Folder Browser is the main workspace where you can work with and find your organization's information. The primary visual aspects in the Folder Browser are the toolbar and the panes.
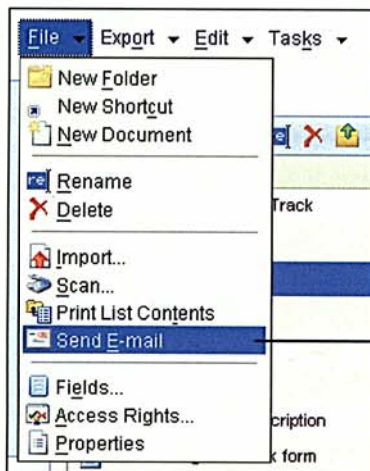
Folder Pane   Toolbar   ► Quick Search

► Recycle Bin

► Preview Pane   Contents Pane
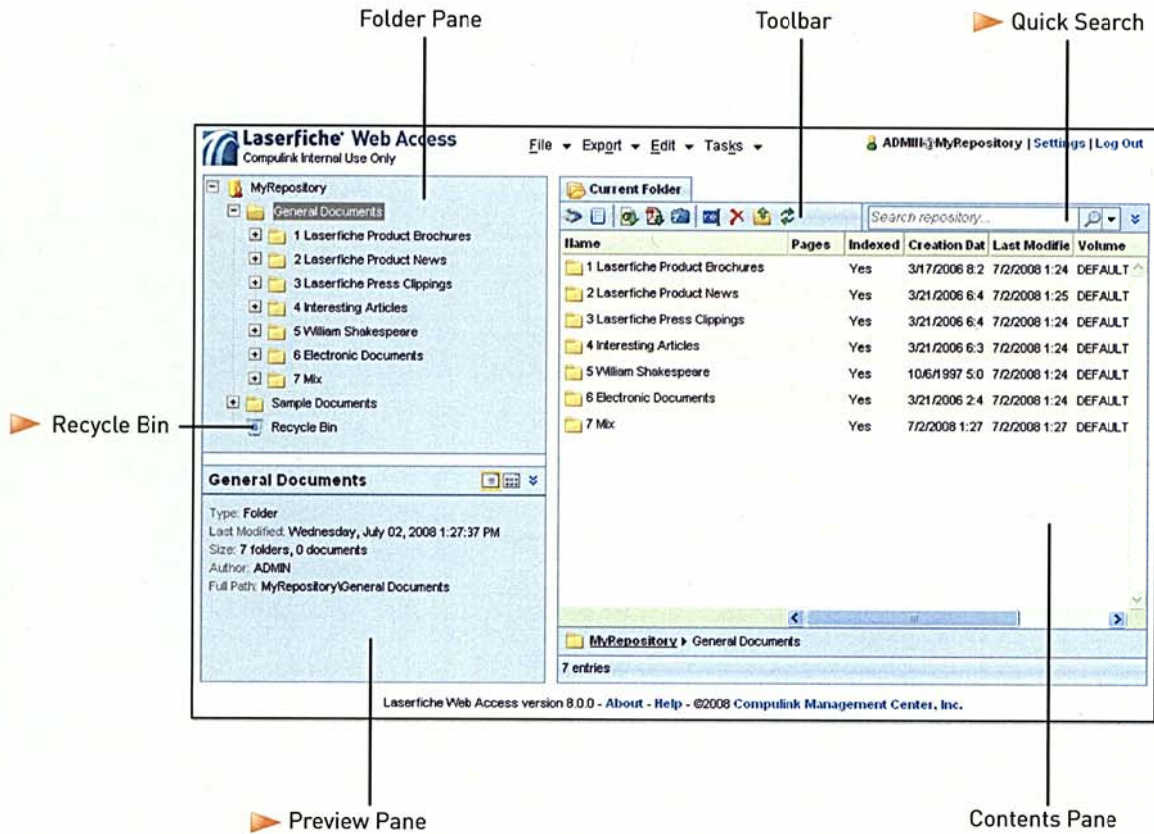
■ For more information about the toolbar and panes, see **User Interface** in the Web Access help files.

Double-click a document icon to open the file.

Name	Pages	Indexed	Creation Date	Last Modified
Laserfiche Technical Track	21	Yes	7/2/2008 1:27:48	7/2/2008 1:24:2
Othello	121	Yes	7/2/2008 1:27:58	7/2/2008 1:25:1
PerformanceReview	2	Yes	7/2/2008 1:27:48	7/2/2008 1:24:2
Romeo and Juliet	106	Yes	7/2/2008 1:28:00	7/2/2008 1:25:1
Timon of Athens	89	Yes	7/2/2008 1:28:02	7/2/2008 1:25:1
Titus Andronicus	84	Yes	7/2/2008 1:28:03	7/2/2008 1:25:1
VAR Conference Description	11	Yes	7/2/2008 1:27:48	7/2/2008 1:24:2
VAR training feedback form	1	Yes	7/2/2008 1:27:48	7/2/2008 1:24:2

Search repository...

Current Folder

File ▾ Export ▾ Edit ▾ Tasks ▾

New Folder
New Shortcut
New Document

Rename
Delete

Import...
Scan...
Print List Contents
Send E-mail

Fields...
Access Rights...
Properties

To e-mail a document, select it, click **File**, and select **Send E-mail**. Configure e-mail properties and compose your e-mail from Web Access.

■ For more information on e-mailing documents from Web Access, see **Sending Documents via E-Mail** in the Web Access help files.

Searching

After storing your documents, 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 expanding the Search Bar.

Quick Search

Search the full text of documents.

Click to toggle the display of the Search Bar.

Search by name for a document, folder, or shortcut.

Search for specific fields and their values.

Search the text inside sticky notes, callout text, and text boxes.

Search Bar

Choose from a variety of search types by clicking **Customize Search** in the Search Bar.

Frequently Used Search Types

Customize Search ▾	Search within **entire repository** ▾ View Advanced Search
Last Modified	Today ☑ ❷ ⊠
Created	Today ☑ ❷ ⊠

Today
Since Yesterday
This week
Within last 2 weeks
This month
Within last 2 months
Within last
Exactly
Before
After
Between

Search by modification or creation date.

Customize Search ▾	Search within **entire repository** ▾ View Advanced Search
Checked Out By	❷ ⊠
Created By	❷ ⊠
Owned By	❷ ⊠

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

View Advanced Search

{LF:modified="7-2-2008"} & {LF:created="7-2-2008"}

View or modify Advanced Search syntax.

■ For more information about searching, see **Searching** in the Web Access help files, or search **support.laserfiche.com.**
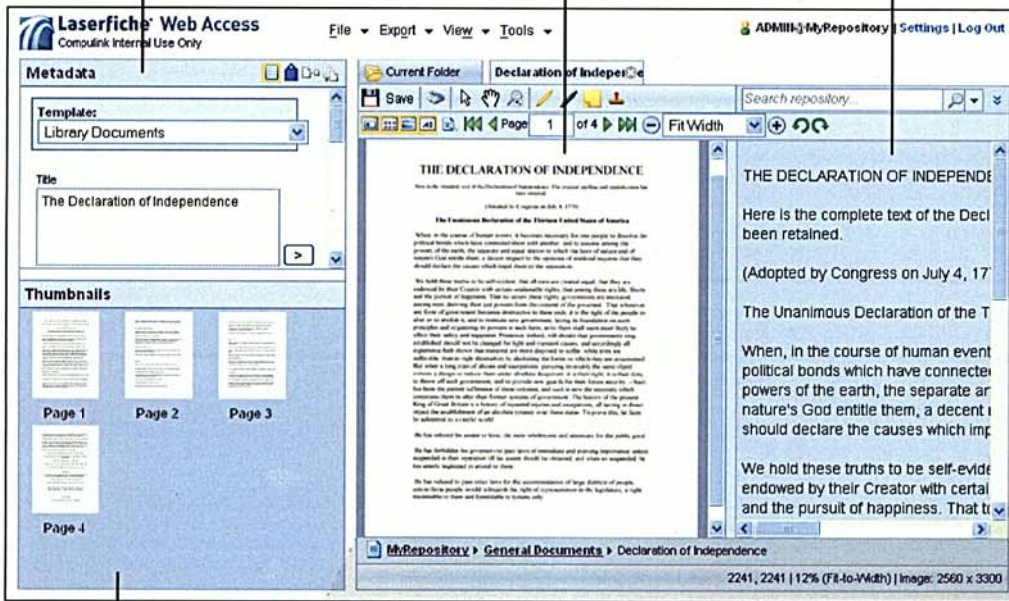
Document Viewer

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, and manage the pages in the document.

Metadata Pane
Add additional information to organize your documents.

Image Pane
The document image.
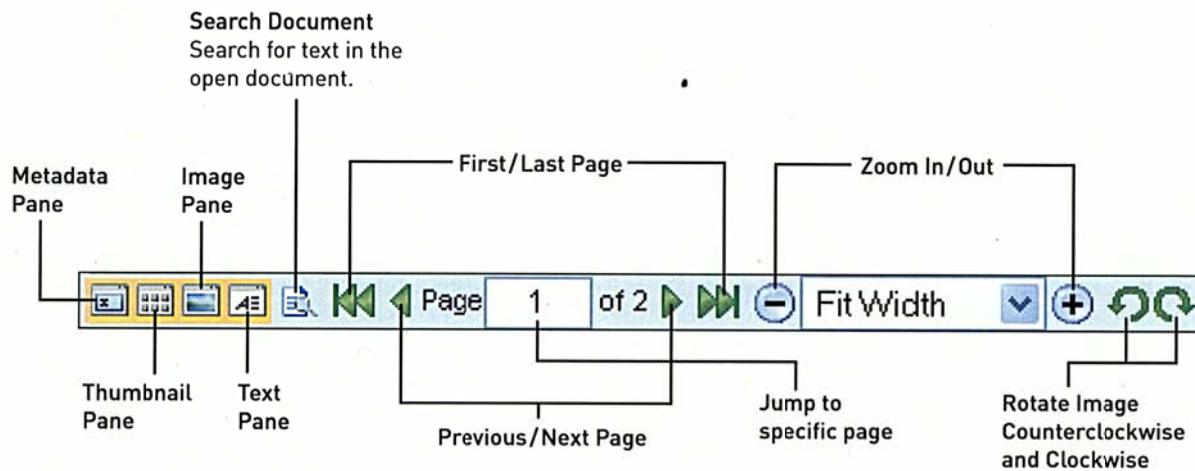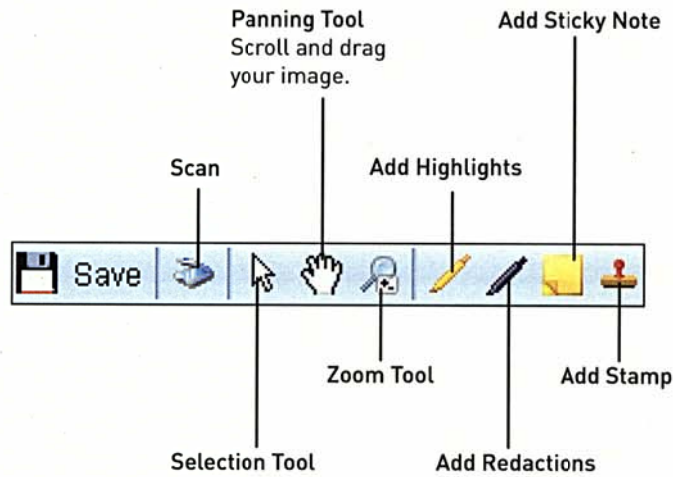
Text Pane
Add or modify searchable text.

Thumbnail Pane
View pages at a smaller scale for easier navigation.

Breadcrumb Navigation
Links are provided to each previous folder you navigated through to get to your current location.
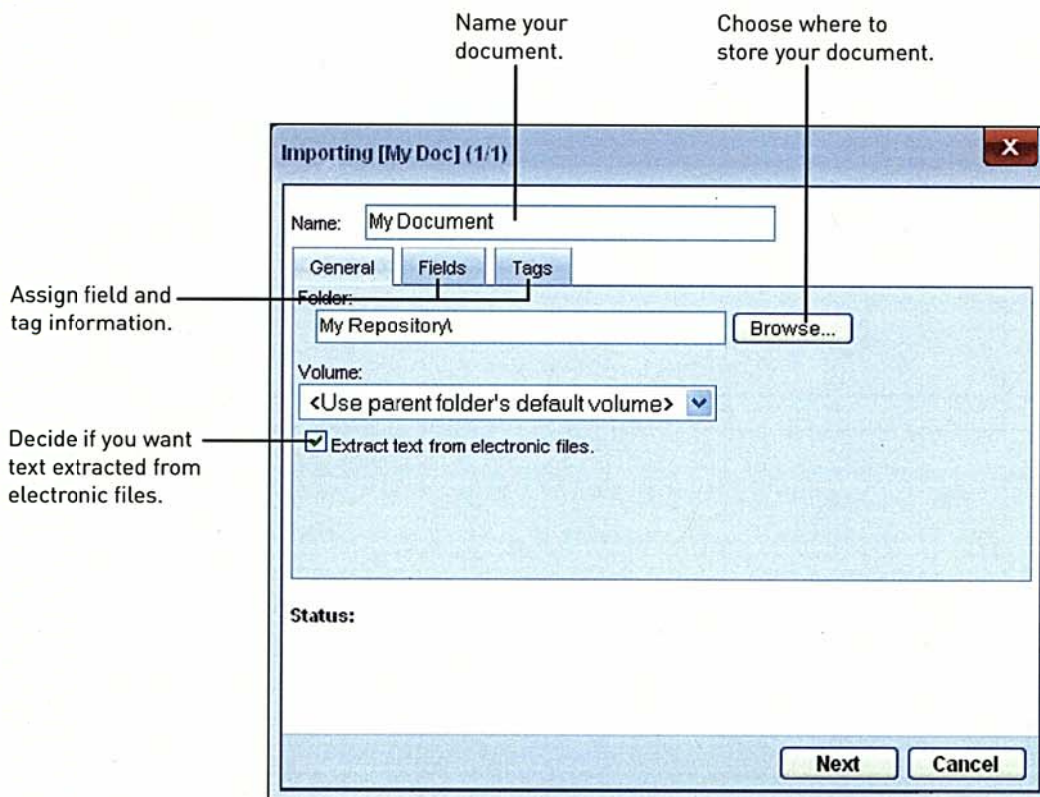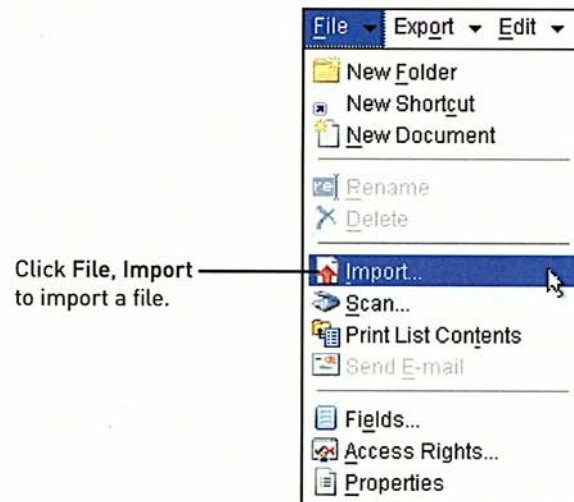
Document Viewer Toolbar

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.

Panning Tool
Scroll and drag
your image.

Add Sticky Note

Scan

Add Highlights

Save

Zoom Tool

Add Stamp

Selection Tool

Add Redactions

Search Document
Search for text in the
open document.

Metadata
Pane

Image
Pane

First/Last Page

Zoom In/Out

Page   1   of 2   Fit Width

Thumbnail
Pane

Text
Pane

Jump to
specific page

Rotate Image
Counterclockwise
and Clockwise

Previous/Next Page

■ For more information about the Document Viewer and Toolbar, see **User Interface** in the Web Access help files.
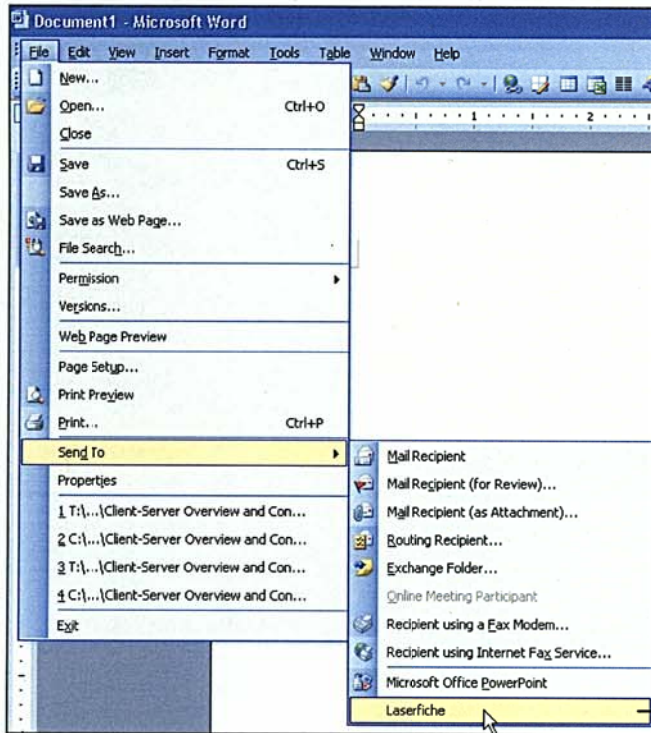
Importing

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 and Windows Explorer directly to a Laserfiche repository.
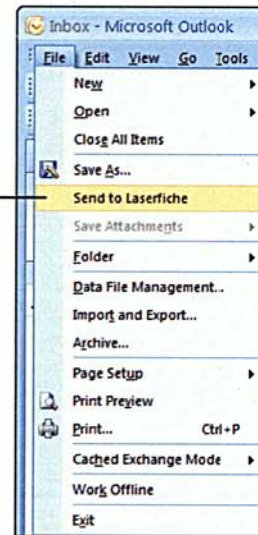
Click File, Import to import a file.

Name your document.

Choose where to store your document.

Assign field and tag information.

Decide if you want text extracted from electronic files.

Microsoft Office Integration

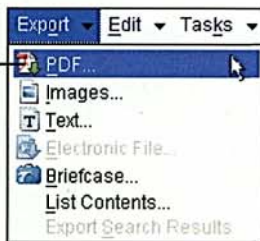Office 2003

Outlook

Office 2007

Send Microsoft Office and
Microsoft Outlook files directly
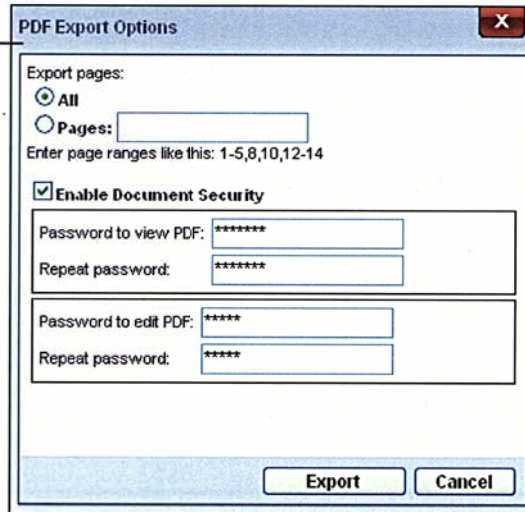to a Laserfiche repository.

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Exporting

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

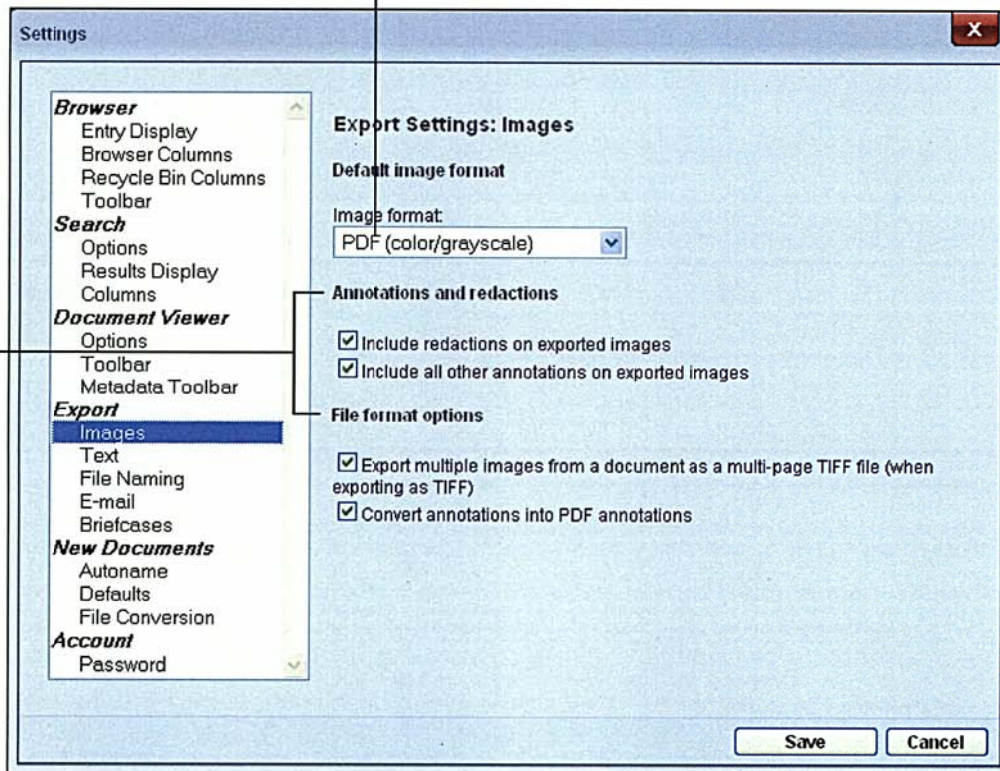Click **Export** and select what you want to export.

Export ▾ Edit ▾ Tasks ▾
- 📄 PDF...
- 🖼 Images...
- T Text...
- 📄 Electronic File...
- 📁 Briefcase...
- List Contents...
- Export Search Results

Password protect images exported as PDFs.

PDF Export Options   ☒

Export pages:
- ⦿ All
- ○ Pages: [   ]

Enter page ranges like this: 1-5,8,10,12-14

☑ **Enable Document Security**

| Password to view PDF: | ******* |
| Repeat password: | ******* |

| Password to edit PDF: | ***** |
| Repeat password: | ***** |

[Export] [Cancel]

Select **Images** under **Export** in the **Settings** dialog box to select the default file format you want images exported to.

You can also choose how you want annotations exported, as well as file format options.

Settings   ☒

Browser
  Entry Display
  Browser Columns
  Recycle Bin Columns
  Toolbar
Search
  Options
  Results Display
  Columns
Document Viewer
  Options
  Toolbar
  Metadata Toolbar
Export
  Images
  Text
  File Naming
  E-mail
  Briefcases
New Documents
  Autoname
  Defaults
  File Conversion
Account
  Password

Export Settings: Images

Default image format

Image format:
[PDF (color/grayscale) ▾]

Annotations and redactions

☑ Include redactions on exported images
☑ Include all other annotations on exported images

File format options

☑ Export multiple images from a document as a multi-page TIFF file (when exporting as TIFF)
☑ Convert annotations into PDF annotations

[Save] [Cancel]

■ For more information about importing and exporting documents, see **Creating Documents** and **Exporting** in the Web Access help files, or search **support.laserfiche.com**.

Printing

Printing in Web Access is done through each document's native application.
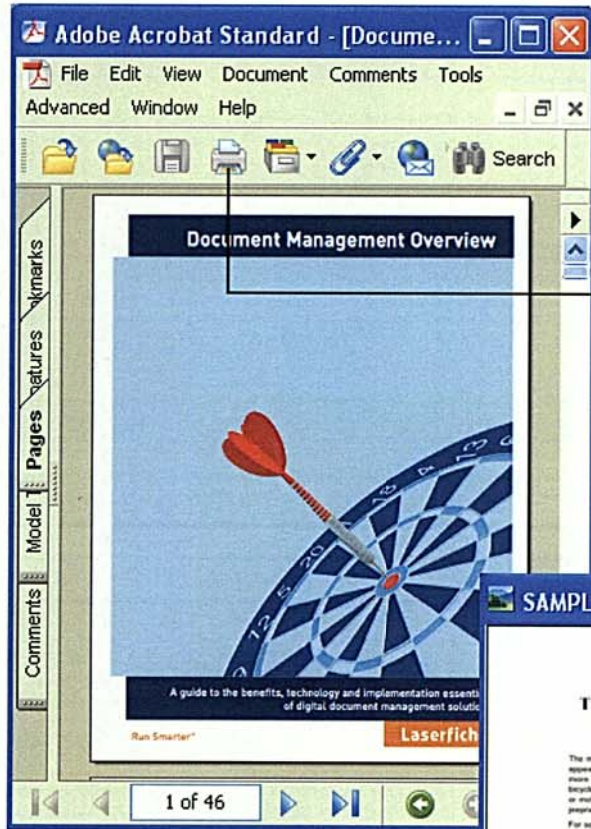
To print an electronic document, right-click it, point to **Open** and select **Electronic Document**. Print it from its native application.
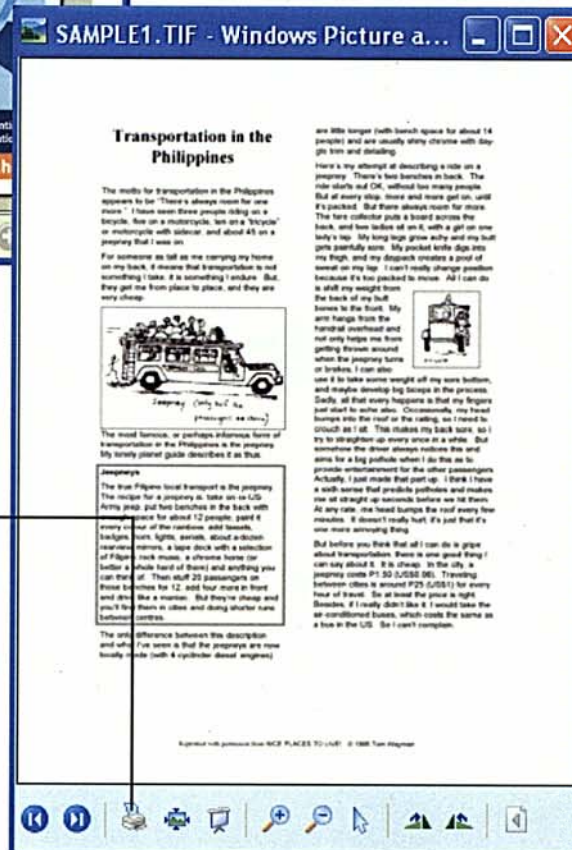
To print an imaged document, export it, for instance, to a PDF or TIFF, open it in its native application, and print it using that application.

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.

Text Box

Attachment

Highlight

Redaction

Strikethrough

Underline

Rectangle

Callout Text

Line

Image

Freehand

To edit text, right-click in the Text Pane and select **Edit Text**.

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.

Select a template.   Select a tag to add to your document.

📁 Current Folder	Julius Caesa⊗

💾 Save | 🔁 Revert   Search repository... 🔍 ▾ ☒

Template:
Library Documents ▾

Tags

☐ 📘 My Informational Tag
☐ 📙 My Security Tag

Title
Julius Caesar

>

Author
Shakespeare   >

Date
07/02/2008 12:00:00 AM ▦ >

Add/Remove Field(s)...

Linked Documents

Attachment: 📄 **Antony and Cleopatra** (Message) -
Remove
My Repository\General Documents\5 William
Shakespeare\Tragedies\Antony and Cleopatra

Add Linked Document...

Versions

Version 1 - 📄 Julius Caesar
ADMIN - 4/22/98 12:42 AM - My Repository\General
Documents\5 William Shakespeare\Tragedies\Julius Caesar
Details - Remove

Add Version...   Import Version...

📄 Metadata for **MyRepository ▸ General Documents ▸ 5 William Shakespeare ▸ Tragedies ▸** Julius Caesar

Displaying metadata for entry

▶ Add or remove fields without associating them with a template.

Create, import, delete, and view versions of a document.

Link to or delete a link to another document in the repository.

■ For more information about annotations and assigning information to documents, see **Viewing and Modifying Documents**, **Assigning Information to a Document**, and **Fields** in the Web Access help files, or search **support.laserfiche.com**.
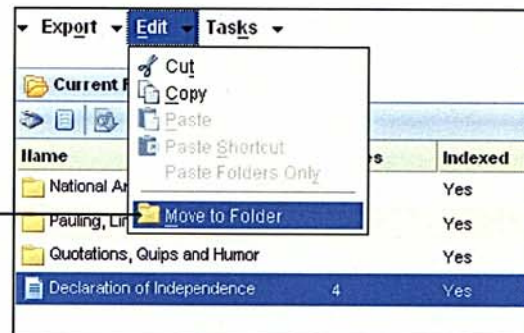
Moving Pages and Documents

Pages can be rearranged within a document, and documents themselves can be moved to new locations in the repository.

Rearrange pages by dragging the thumbnail to the new location.
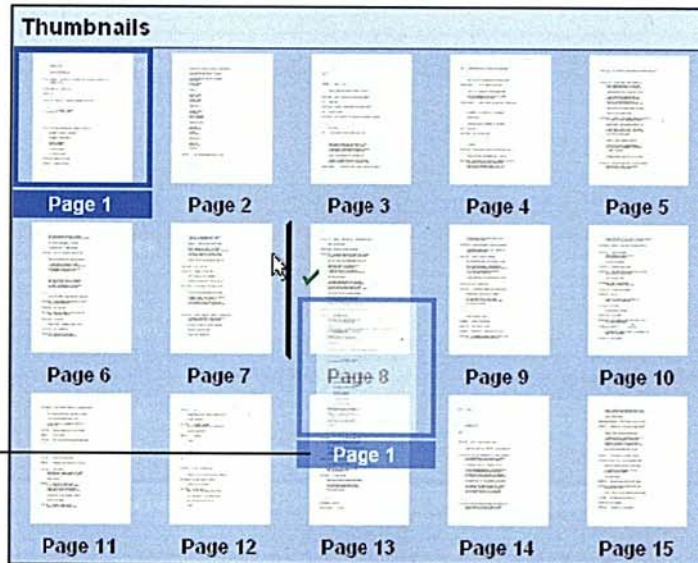
To move a document to a different location, select it in the Folder Browser and select **Move to Folder** from the **Edit** menu.

■ For more information on moving pages and documents, see **Working with Documents** and **Viewing and Modifying Documents** in the Web Access help files.

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.

Please select the scanning mode

Choose a layout for scanning images:

⦿ Basic
○ Standard

Choose the desired scanning mode.

OK   Cancel

OCR Settings...   Enhancements...

File Type: *.tif

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

For Help, press F1

1   of 4

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

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.

Image enhancements and processes assigned to the scanned document.

The properties associated with the scanned document.

Scanned images

Thumbnail Pane

Image enhancements and processes
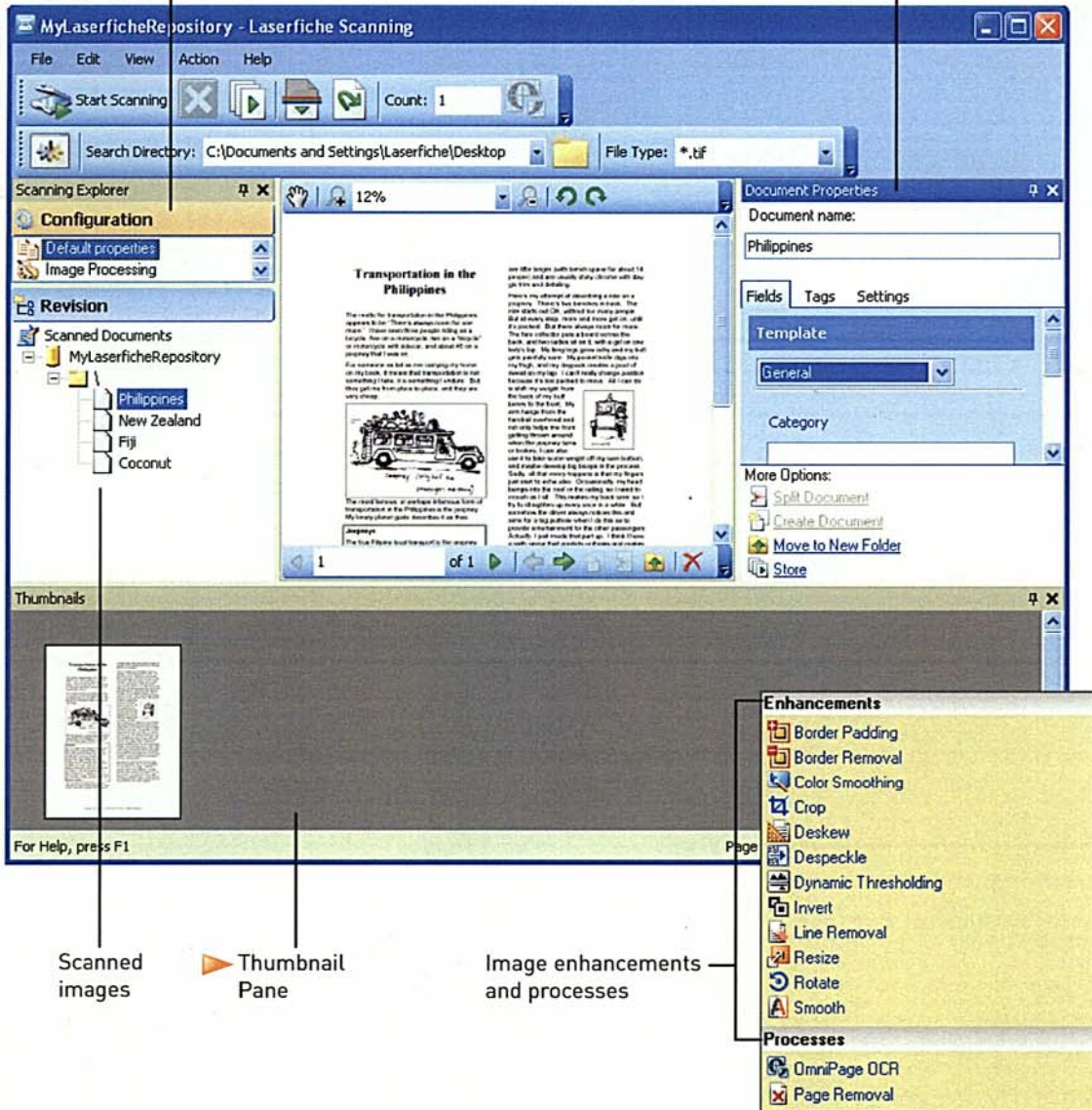
- For more information on scanning, see **Web Scanning** in the Web Access help files or search **support.laserfiche.com**.