

Laserfiche®

GETTING STARTED WITH Laserfiche



Contents

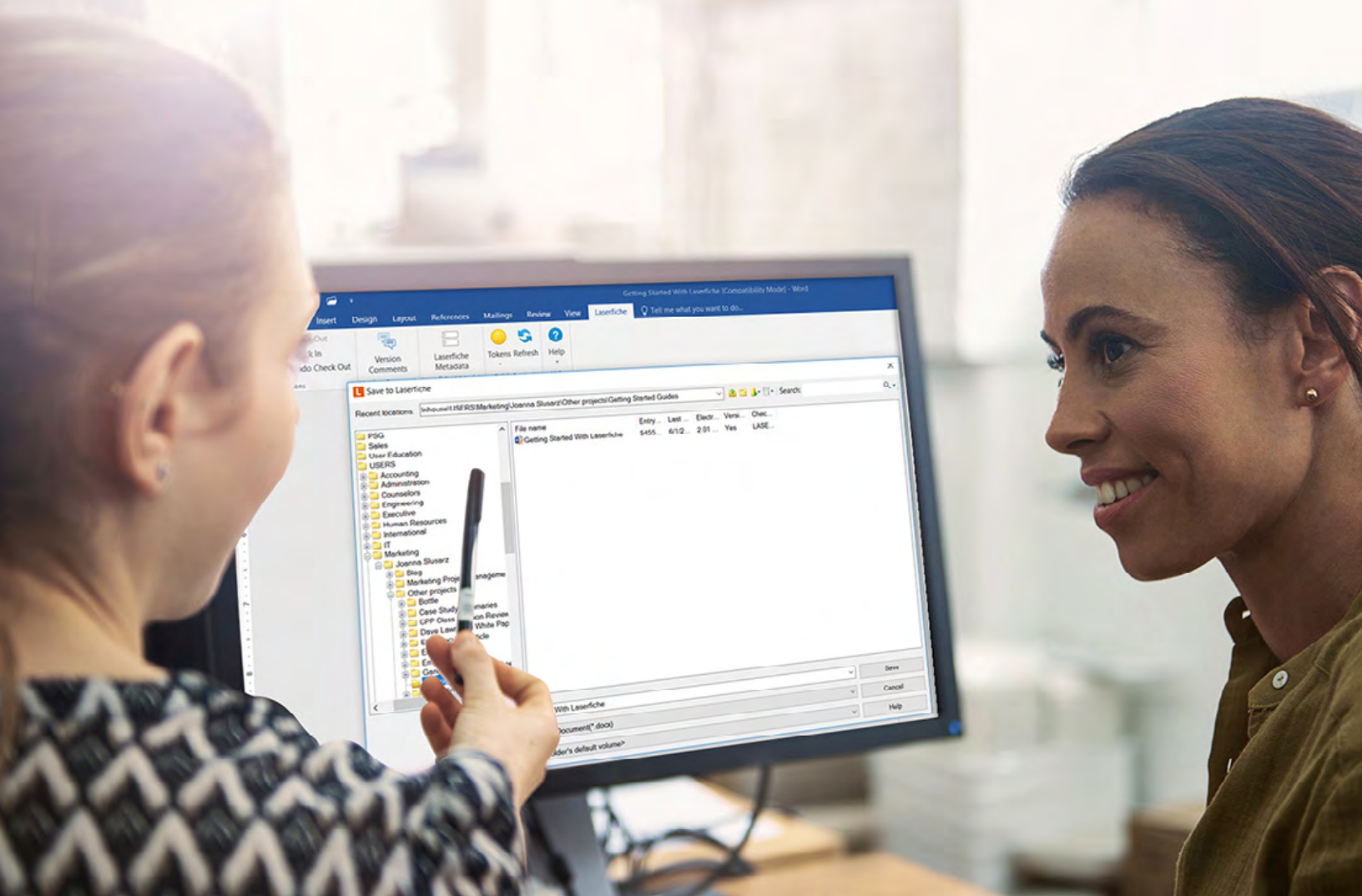
Introduction.....	1
Chapter 1: Laserfiche User Interface Overview.....	4
Chapter 2: Getting Documents into Laserfiche.....	9
Chapter 3: Working With Documents in Laserfiche.....	19
Chapter 4: Tips & Tricks.....	51
Key Terminology	65
Additional Resources	69

Introduction

Laserfiche Quick Start Guide

Welcome to Laserfiche! This quick start guide will help you start using the most common Laserfiche features. You can get more information from the additional resources listed at the end of the guide. Certain resources listed in this guide require a free Laserfiche Account to access. Those resources are marked with an asterisk (*). You can create the free account [here](#).

The terminology in these sections is also defined at the end of the guide.



Accessing Your Repository

The Laserfiche repository can be accessed in three different ways:

- The Laserfiche Windows client
- The Laserfiche web client
- The Laserfiche mobile app

The following information relates to the Windows and web client. For information on the Laserfiche mobile app, visit the [Laserfiche App Help Files](#).

Some organizations may only have one option available. Check with your IT department about which client is available to you.

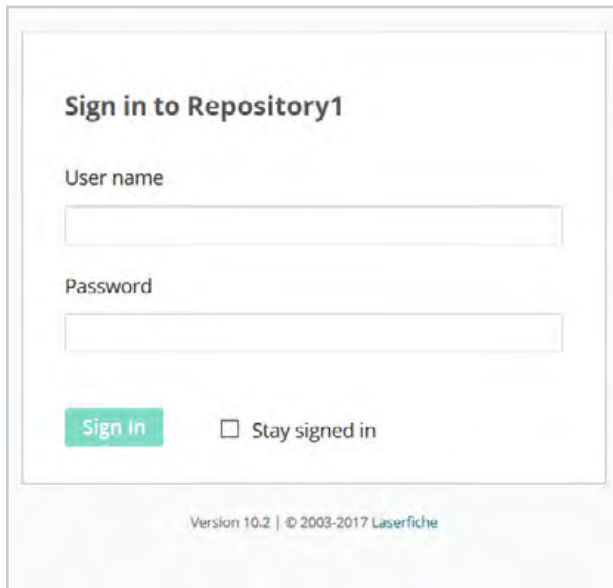
Signing in

You can sign in to the Laserfiche Windows or web client using one of the following methods:

- A specific username and password provided to you by your IT department
- Your Windows login credentials

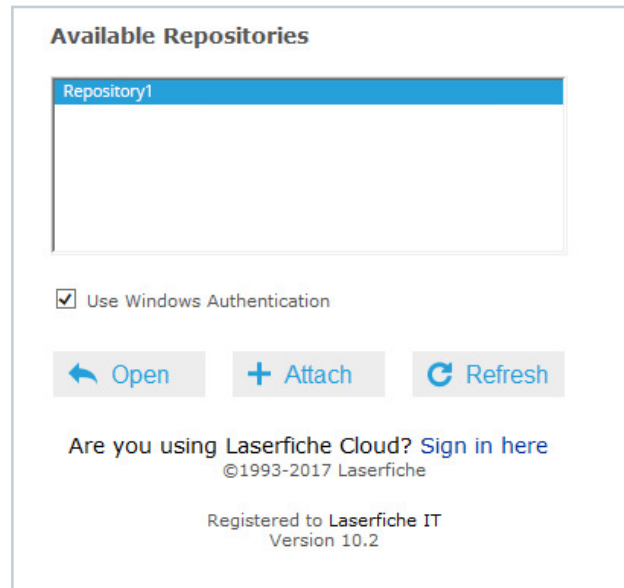
When you are signing in, you must first select the appropriate repository from the list. Your IT department or department manager will tell you which login method to use and which repository or repositories you are able to access.

You can sign in to both the Windows and web clients simultaneously.



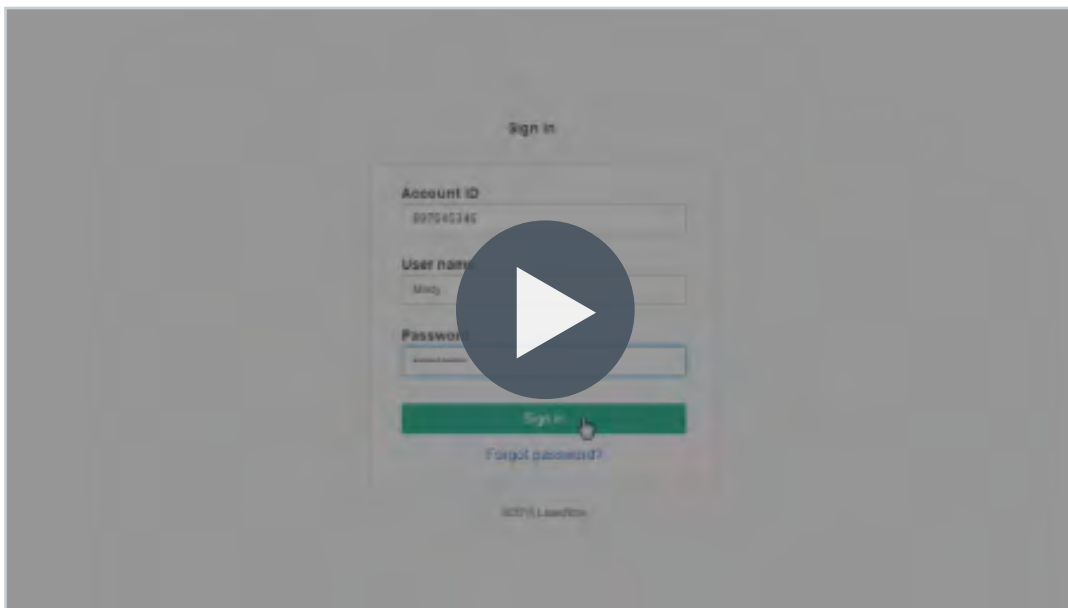
The screenshot shows the 'Sign in to Repository1' web interface. It features a title 'Sign in to Repository1' at the top. Below it are two input fields: 'User name' and 'Password'. A green 'Sign In' button is positioned to the left of a 'Stay signed in' checkbox. At the bottom, it displays 'Version 10.2 | © 2003-2017 Laserfiche'.

Signing in to the Laserfiche web client



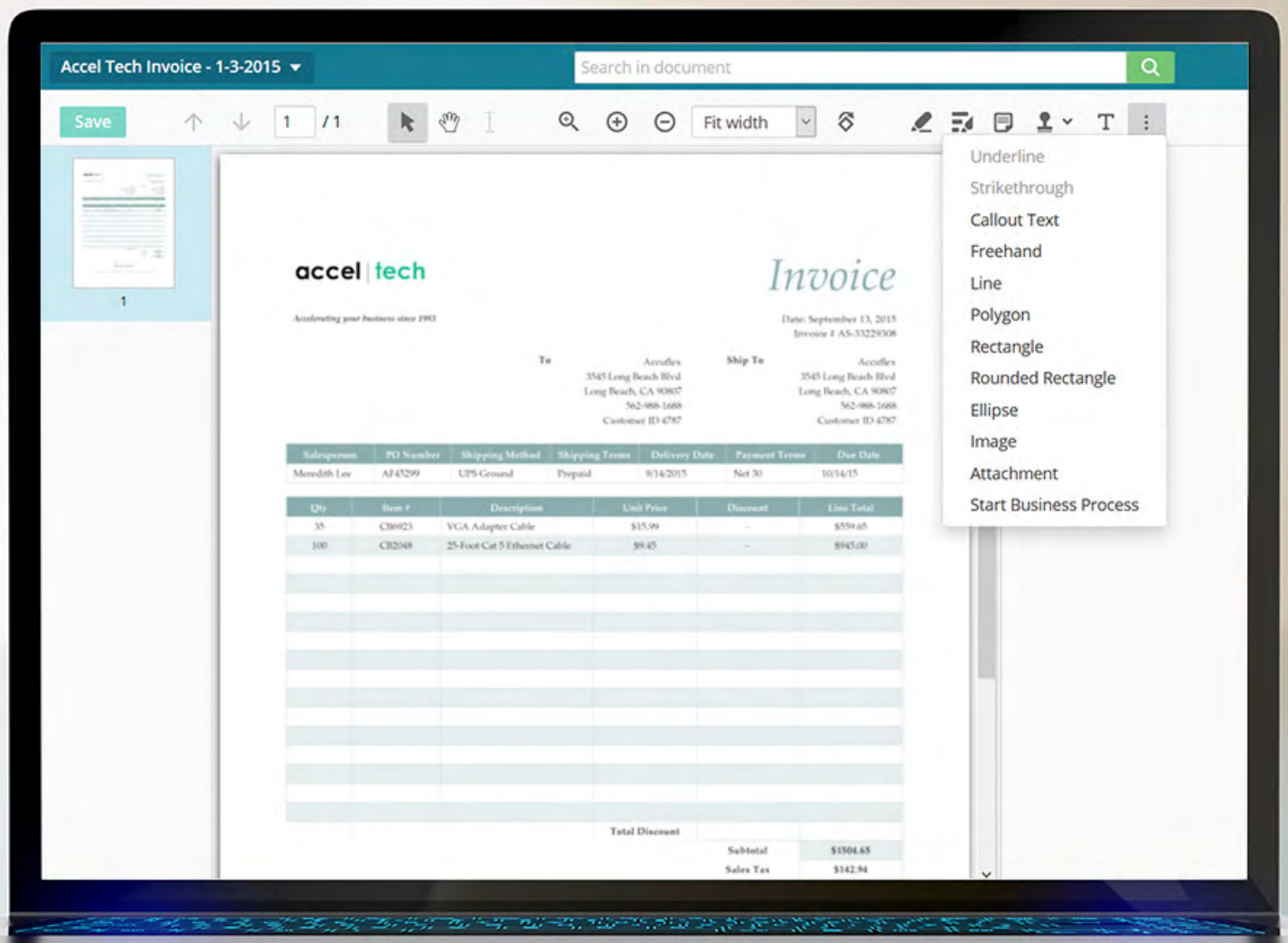
The screenshot shows the 'Available Repositories' window of the Windows client. It has a title 'Available Repositories'. Below the title is a list box containing 'Repository1'. A checkbox labeled 'Use Windows Authentication' is checked. Below the list box are three buttons: 'Open' (with a left arrow icon), 'Attach' (with a plus icon), and 'Refresh' (with a circular arrow icon). At the bottom, it says 'Are you using Laserfiche Cloud? Sign in here' with a link, followed by '©1993-2017 Laserfiche' and 'Registered to Laserfiche IT Version 10.2'.

Signing in to the Laserfiche Windows client

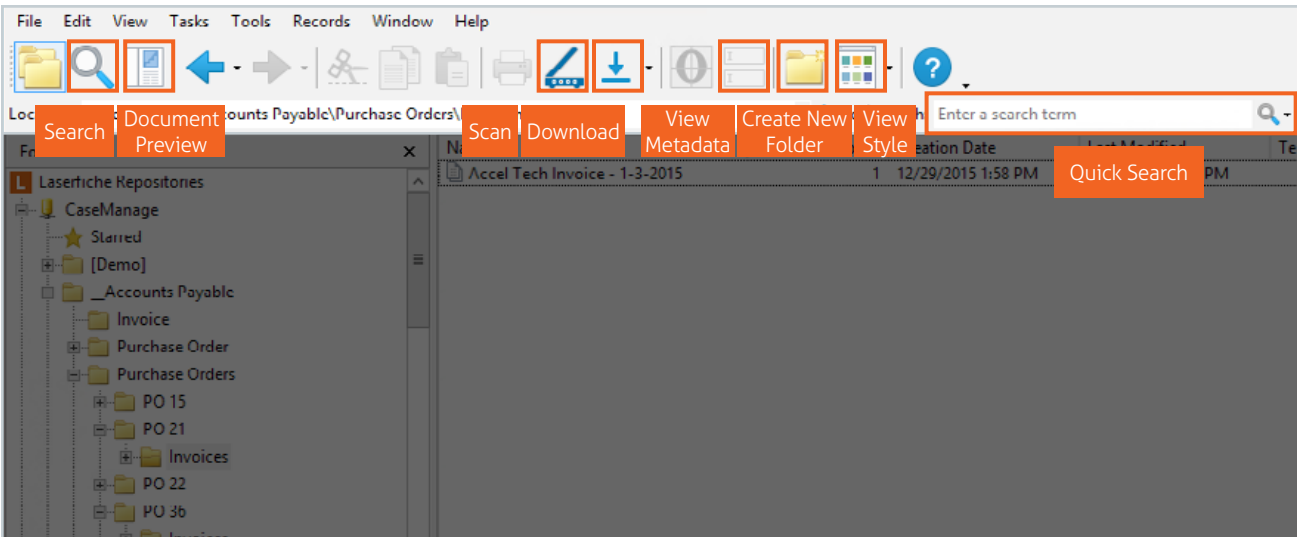


Video: Signing in to Laserfiche

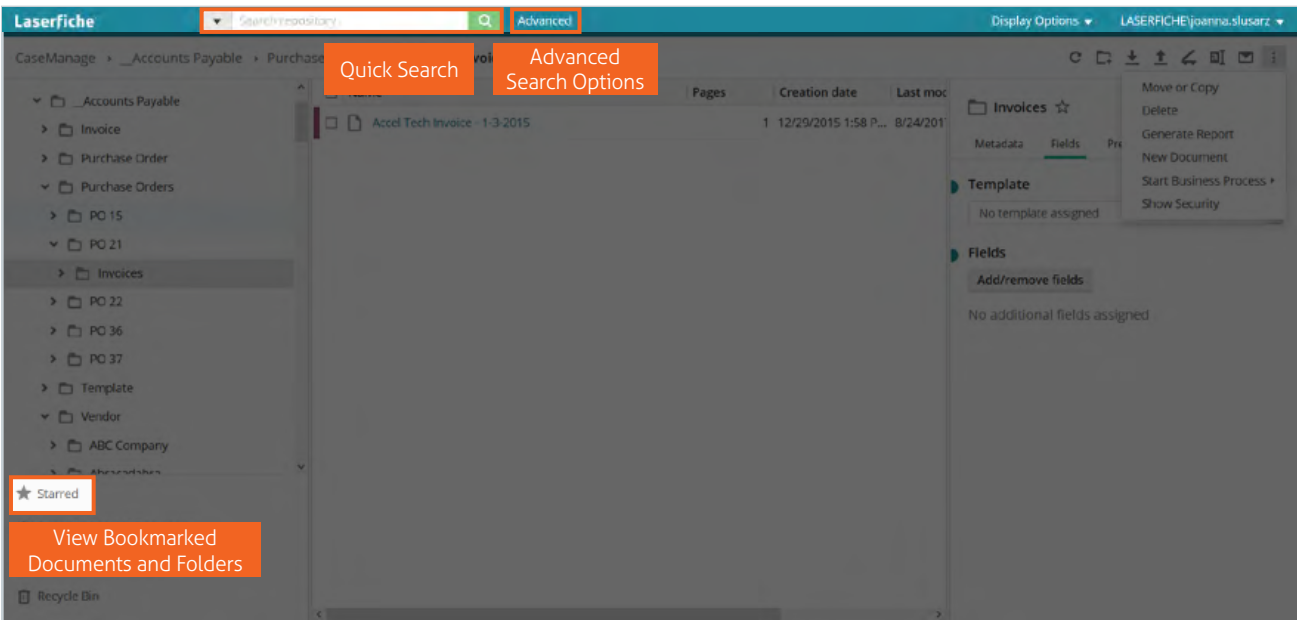
Laserfiche User Interface Overview



Once you sign in to the repository, you will be greeted with the Folder Browser view.



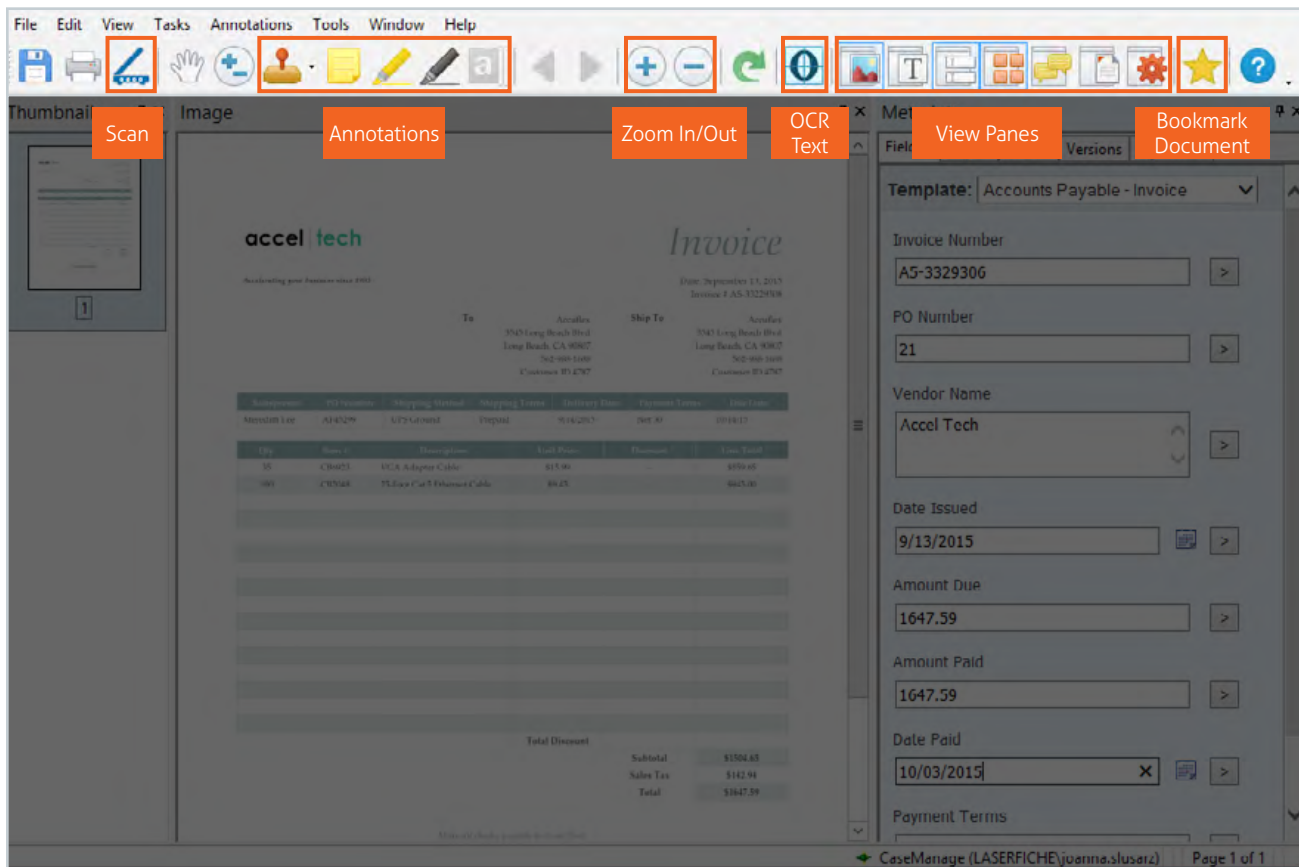
Laserfiche Windows Client Folder Browser



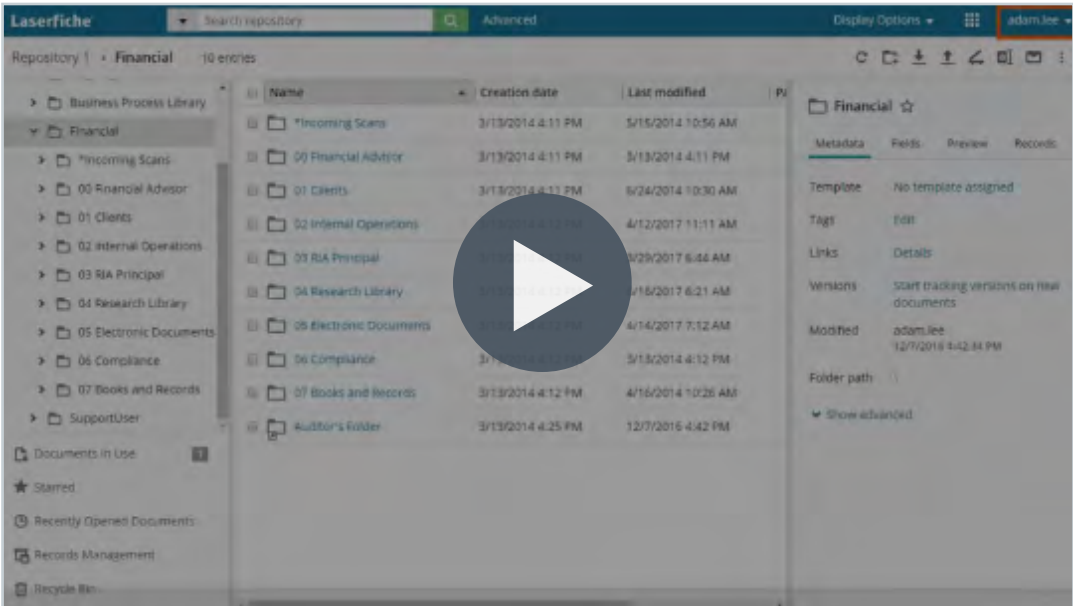
Laserfiche Web Client Folder Browser

In Laserfiche, you will find numerous documents. Some documents will be in the form of electronic files, such as PDFs or Microsoft Word documents. If you click on an electronic file, it will open in its native application. The only exception are PDFs which open in a Laserfiche PDF Viewer, by default, and Microsoft Office documents that will open in the Document Viewer (available with the Microsoft Office Online integration only). You can also choose to open PDF files in your computer's native PDF reader such as Adobe Acrobat, by electing to edit the file when prompted in the web client or checking out the file in the Windows client.

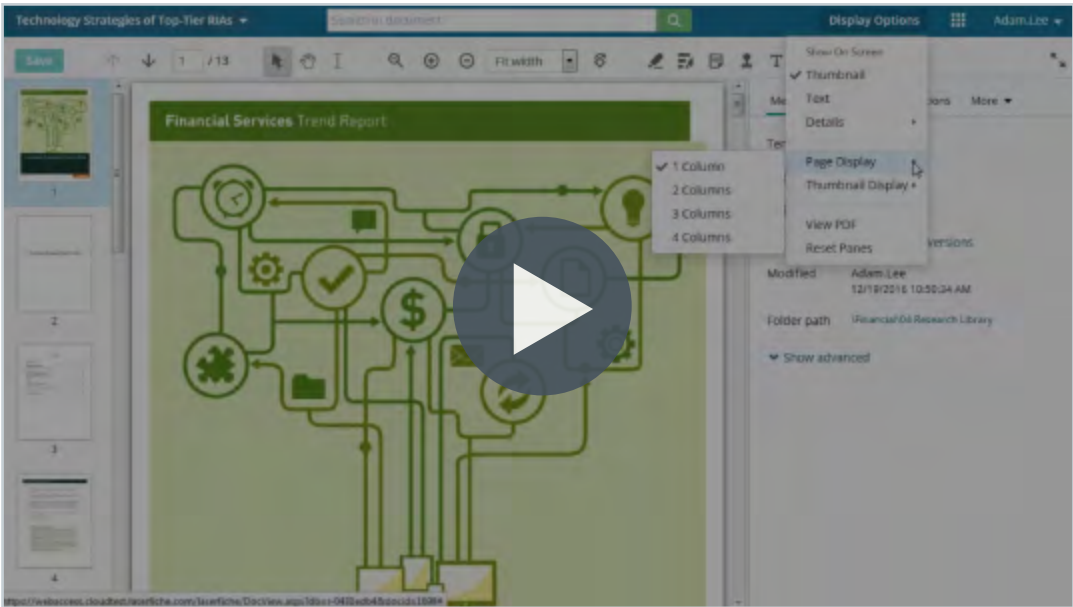
Other file types stored in Laserfiche are imaged files, known as TIFF files. Those files open directly in the Laserfiche Document Viewer.



Laserfiche Windows Client Document Viewer



Video: Laserfiche Folder Browser



Video: Laserfiche Document Viewer

Chapter 2

Getting Documents into Laserfiche

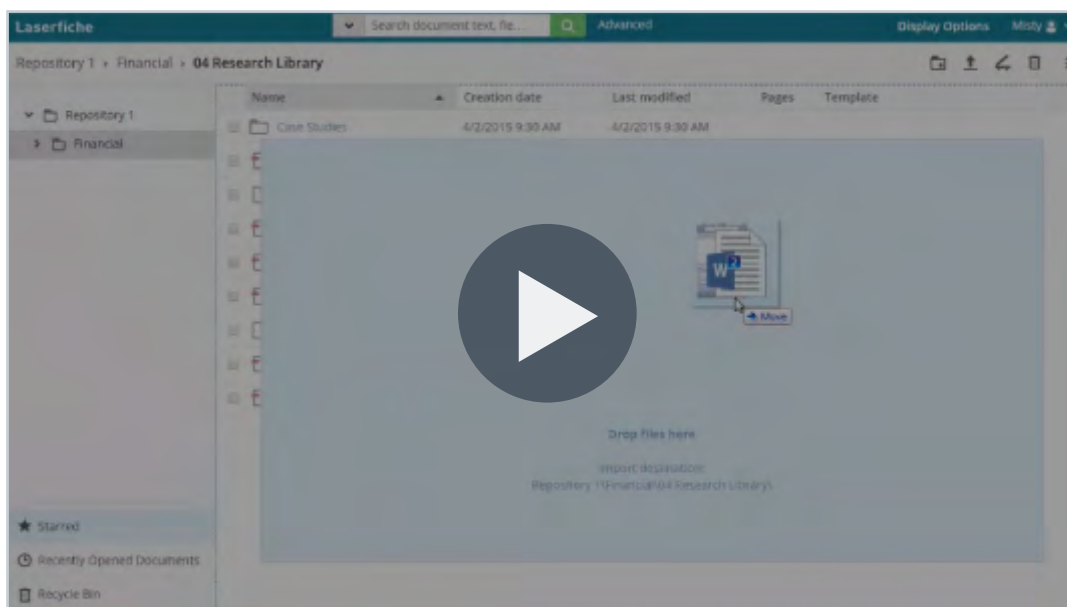


You can add new content into Laserfiche in a variety of ways. Some of the most common include:

- Import/Drag and Drop
- Laserfiche Snapshot
- Microsoft Office Integration
- Laserfiche Scanning

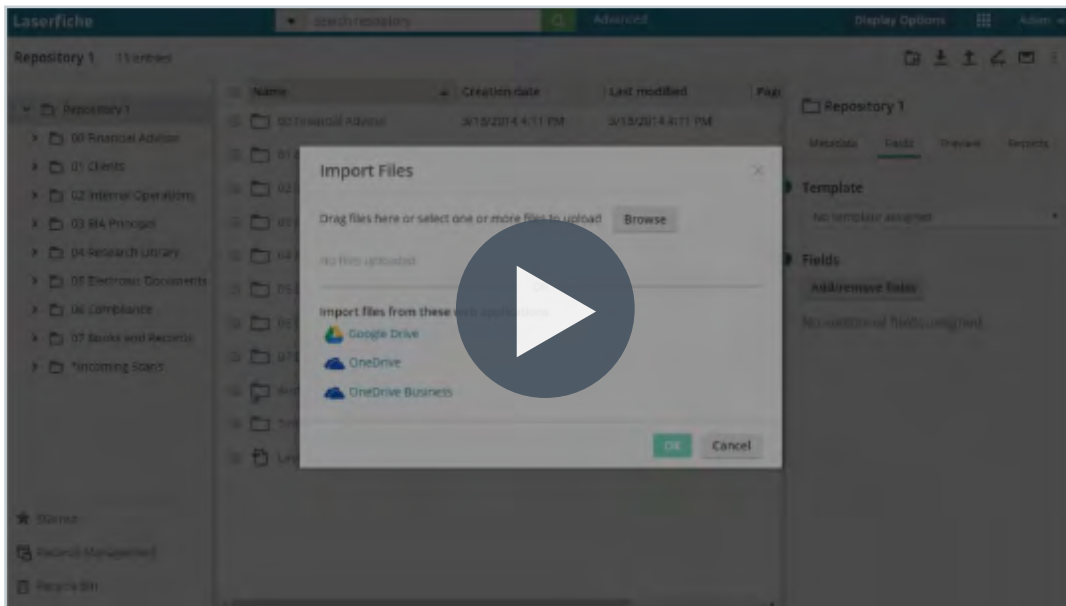
Import/Drag and Drop

Drag and drop, or import digital documents into the repository from your hard drive or desktop.



Video: Importing Documents into Laserfiche

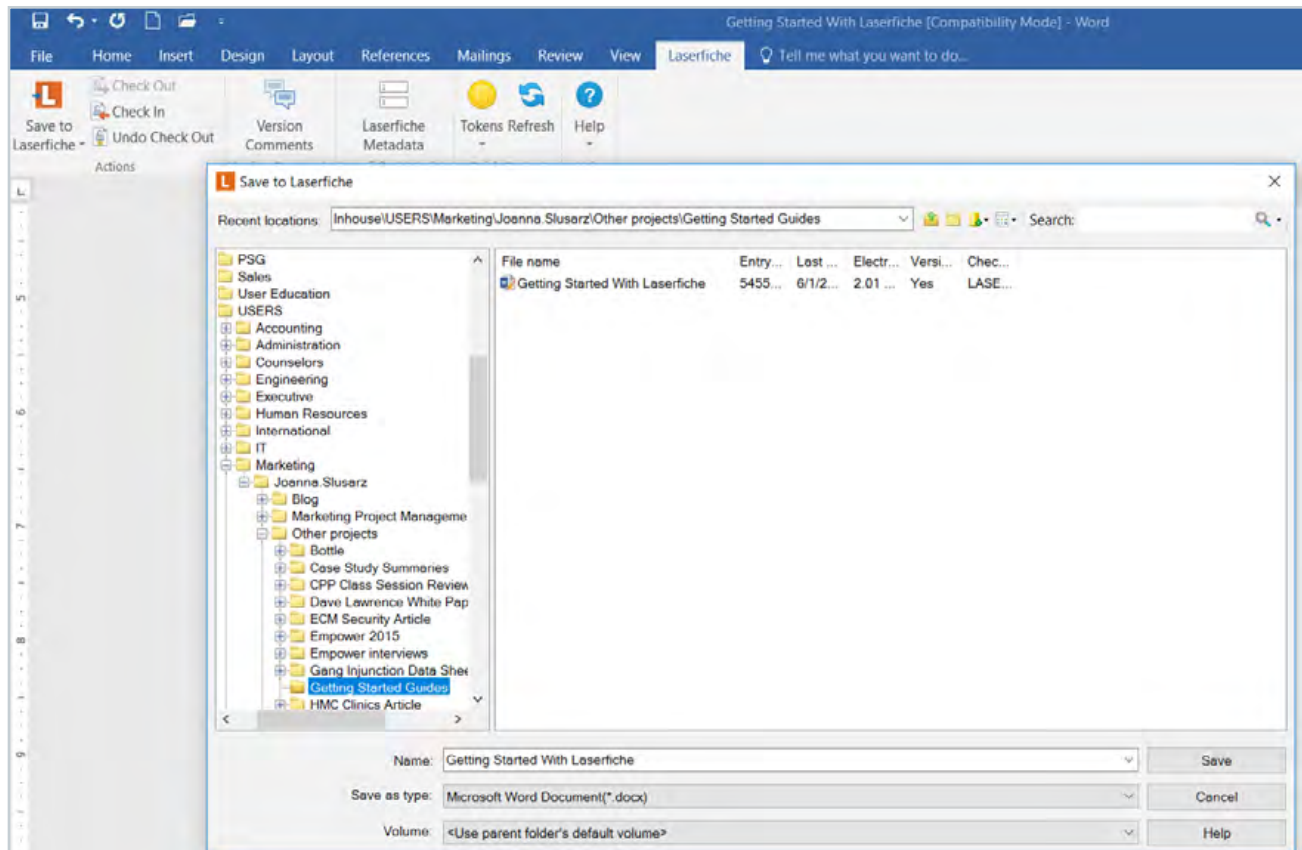
Import documents from Microsoft One Drive and Google Drive (Laserfiche web client only). This option is only available if your administrator has enabled and configured it.



Video: Import to Laserfiche from OneDrive and Google Drive

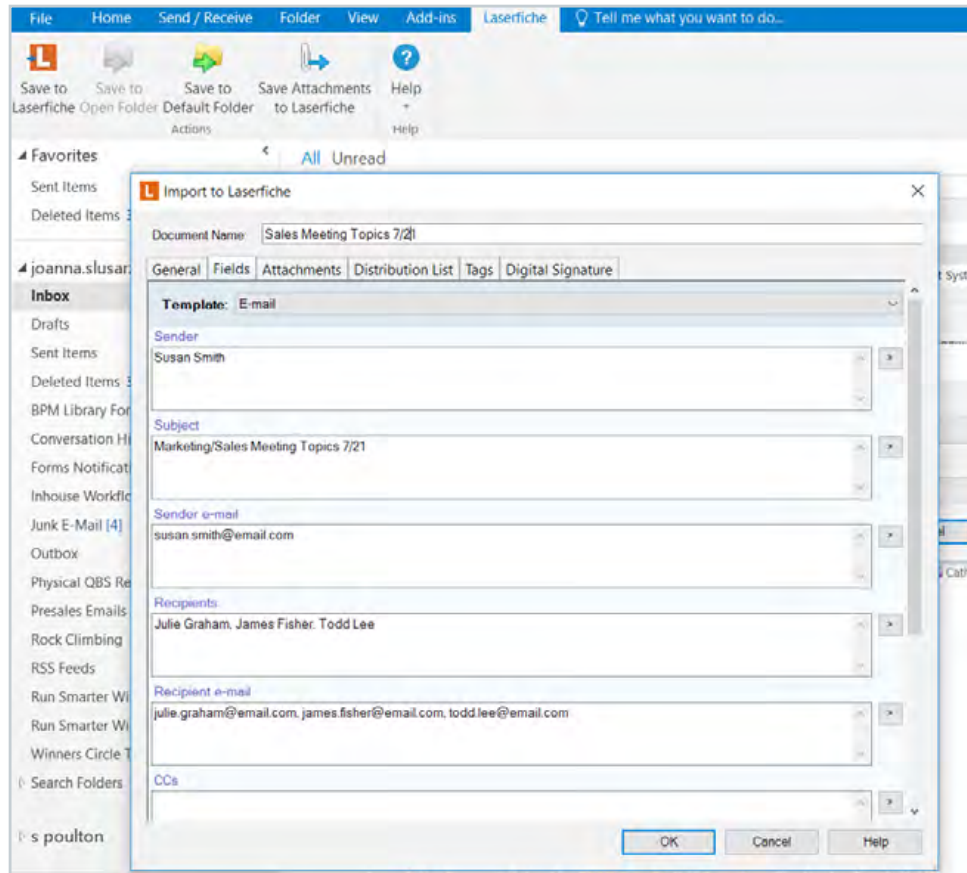
Microsoft Office Integration

Import Microsoft Office documents and populate metadata (Word, Excel and PowerPoint) directly from within the application using the Microsoft Office integration.

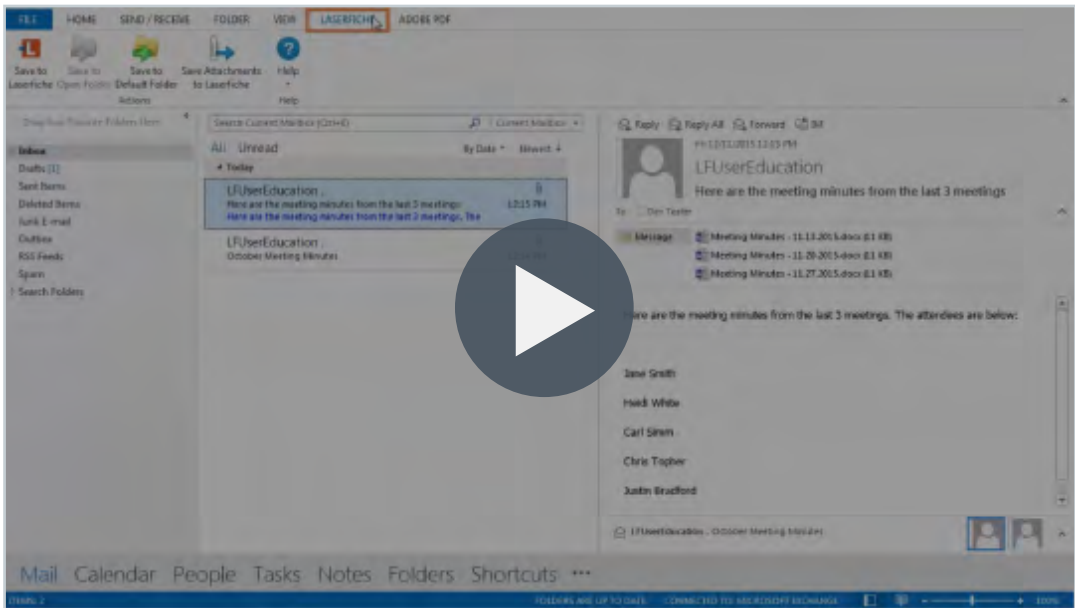


The Laserfiche toolbar in Microsoft Office applications let you save documents to the repository

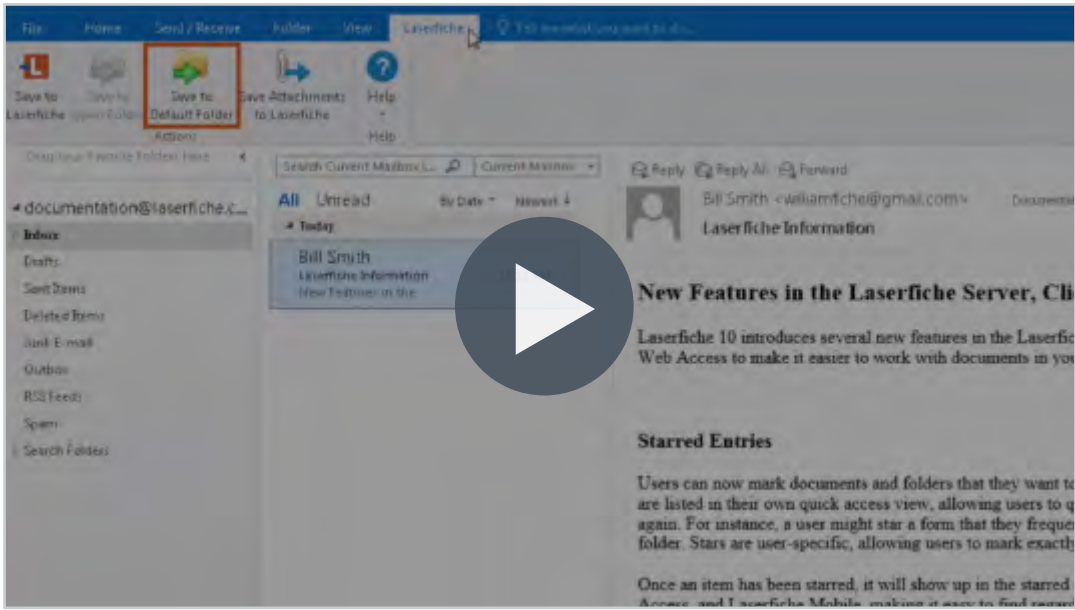
Import emails and/or their attachments using the Laserfiche Outlook integration with appropriate metadata applied automatically. You can also drag and drop emails from Outlook directly into Laserfiche.



The Laserfiche toolbar within Microsoft Outlook lets you save emails to the repository



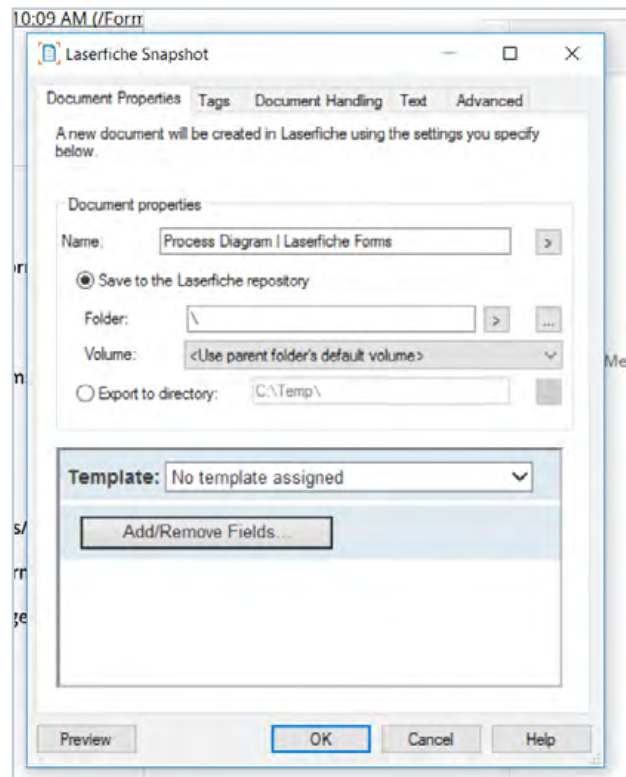
Video: Manually Send Outlook Emails to Laserfiche



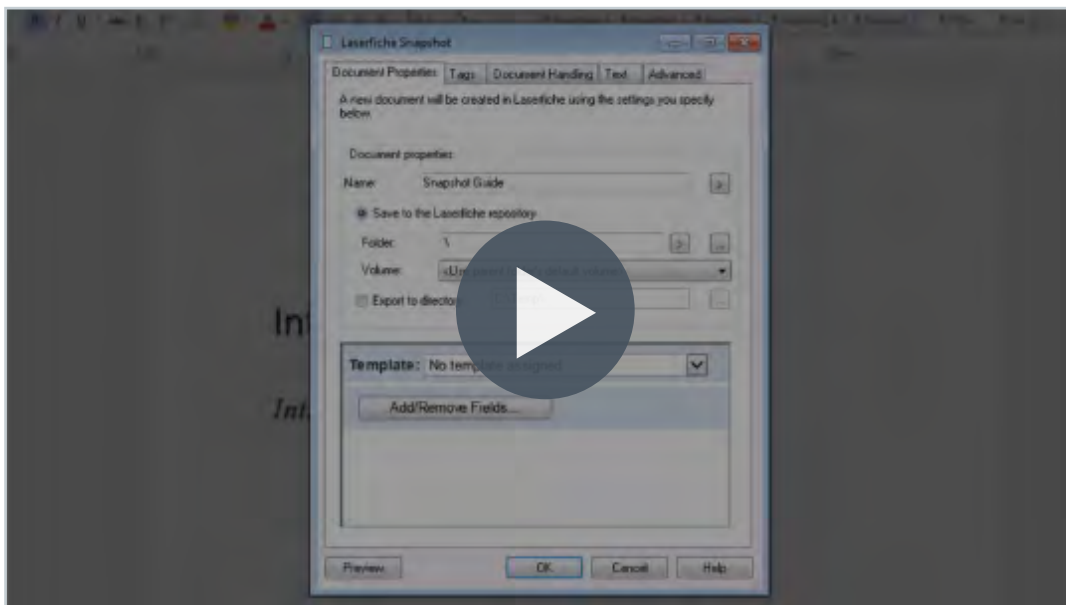
Video: Saving Emails to a Default Laserfiche Folder

Laserfiche Snapshot

Print websites or other digital documents into Laserfiche as a TIFF image using the Laserfiche Snapshot printer. During printing, you can specify the correct repository folder where the document should be saved, and add any metadata. If your administrator has set up Snapshot, it should be available from your list of printers when you open the Print option within your application.



Laserfiche Snapshot prints documents and webpages into the repository and saves them as TIFF images

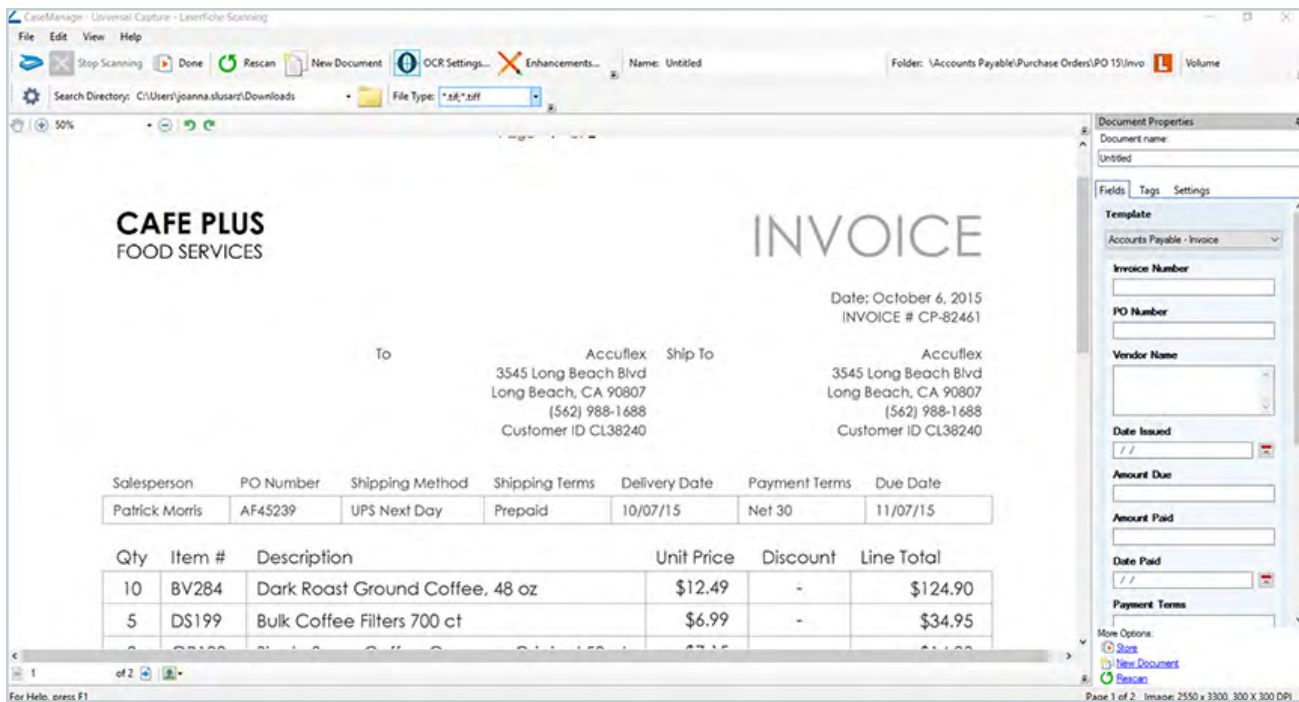


Video: Saving a Document with Laserfiche Snapshot

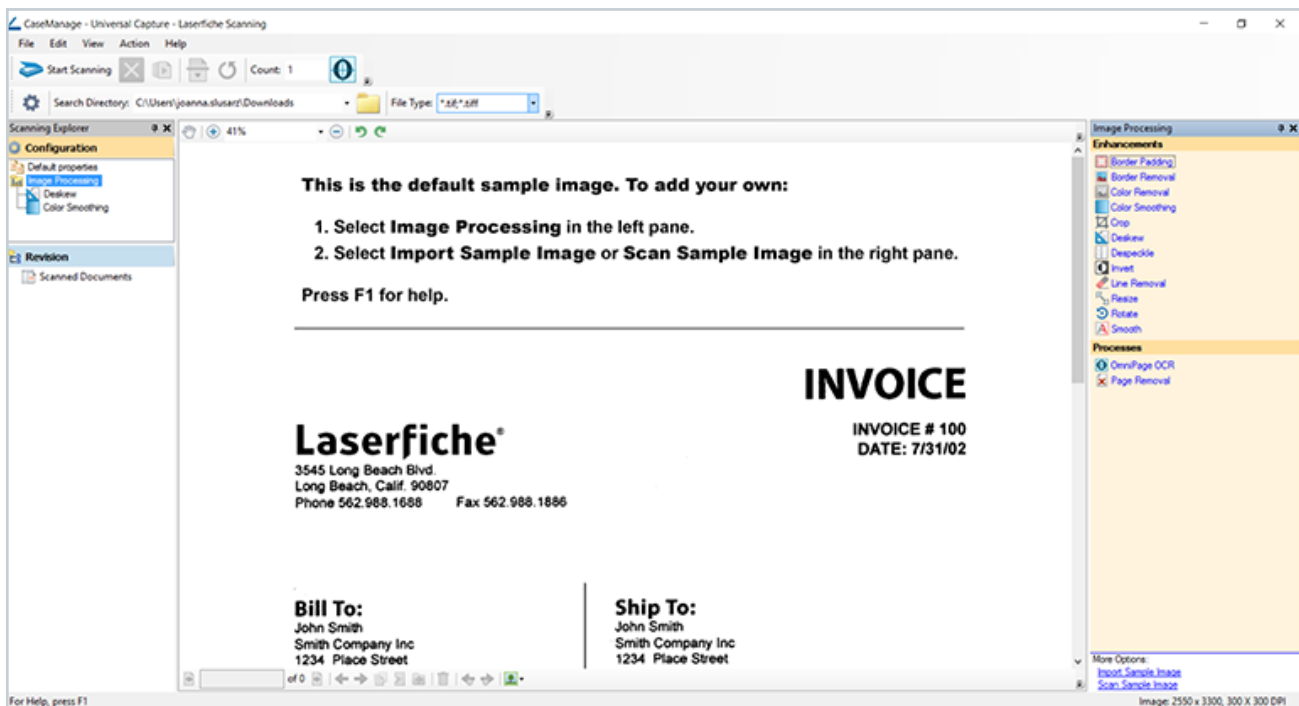
Laserfiche Scanning

Scan paper documents into Laserfiche with Laserfiche Scanning.

1. Navigate to where you want the document stored and then press the scanner icon in the toolbar ( in the web client and  in the Windows client). This will launch the Laserfiche Scanning module.
2. From there, you can select either:
 - Laserfiche Basic Scanning (best for scanning in one document at a time with basic enhancements)
 - Laserfiche Standard Scanning (best for scanning in a batch of documents)
3. Once you open a particular scanning module, you can scan from your hard drive or network drive. You can also capture and process electronic documents through scanning by selecting Universal Capture as the scan source.
4. During scanning, you can populate the document's metadata, split the document into multiple documents, perform OCR on the document and add different enhancements (such as rotate pages, remove lines or blank pages, or despeckle the image).

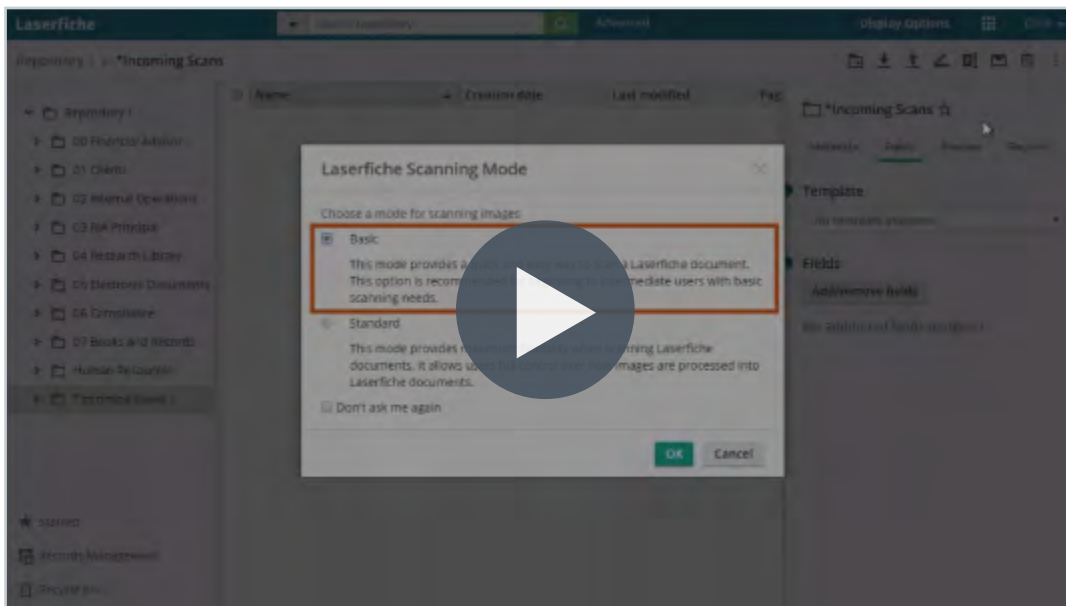


The Laserfiche Basic Scanning interface

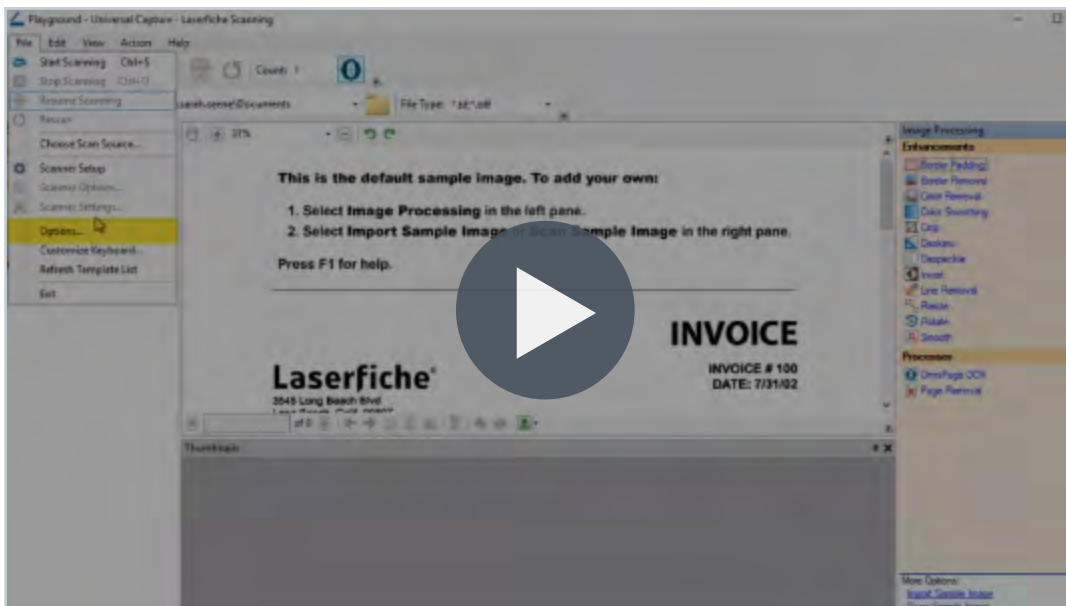


The Laserfiche Standard Scanning interface

Learn More: [Read the Laserfiche Scanning Help Files](#)



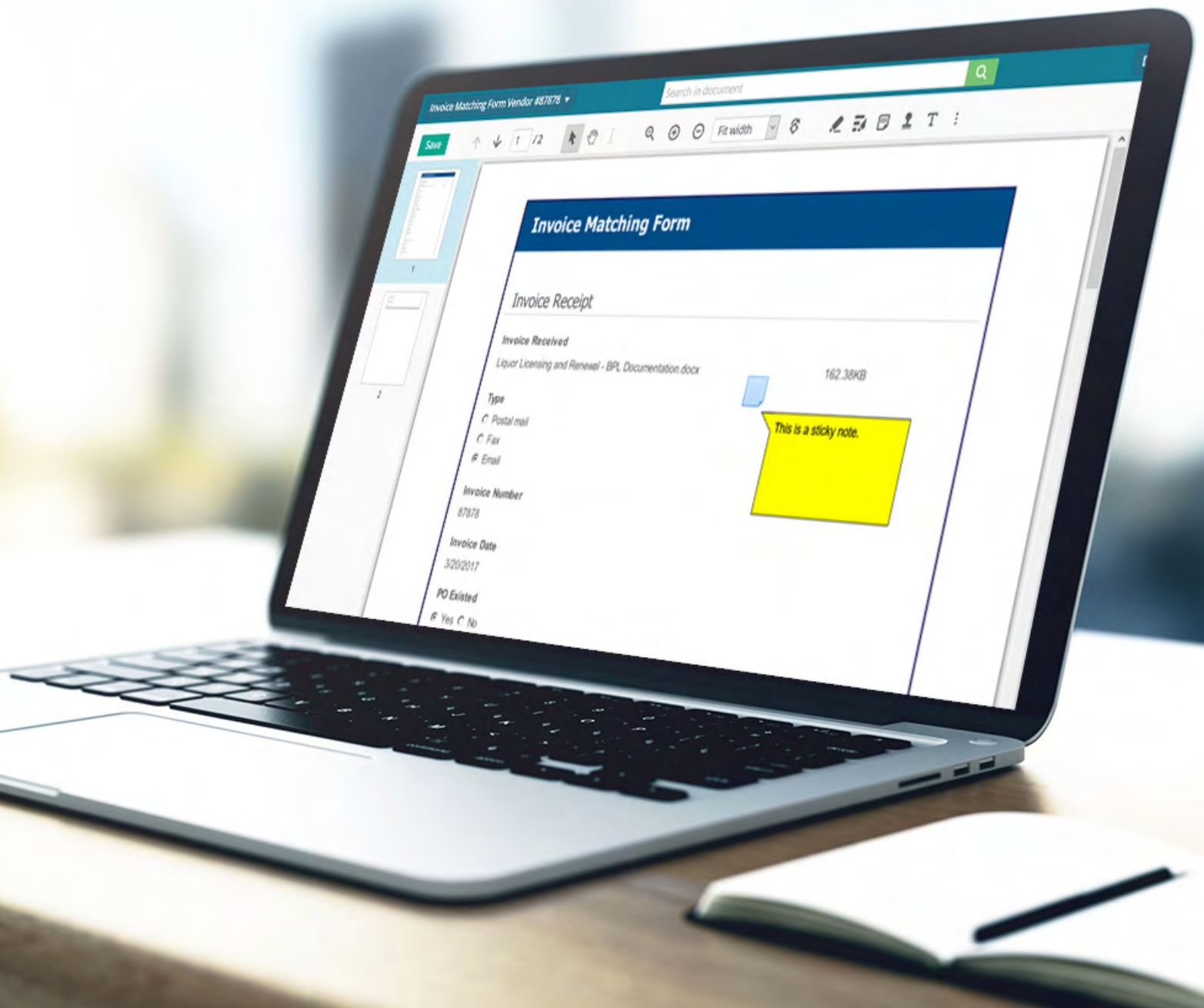
Video: Laserfiche Basic Scanning



Video: Laserfiche Standard Scanning

Chapter 3

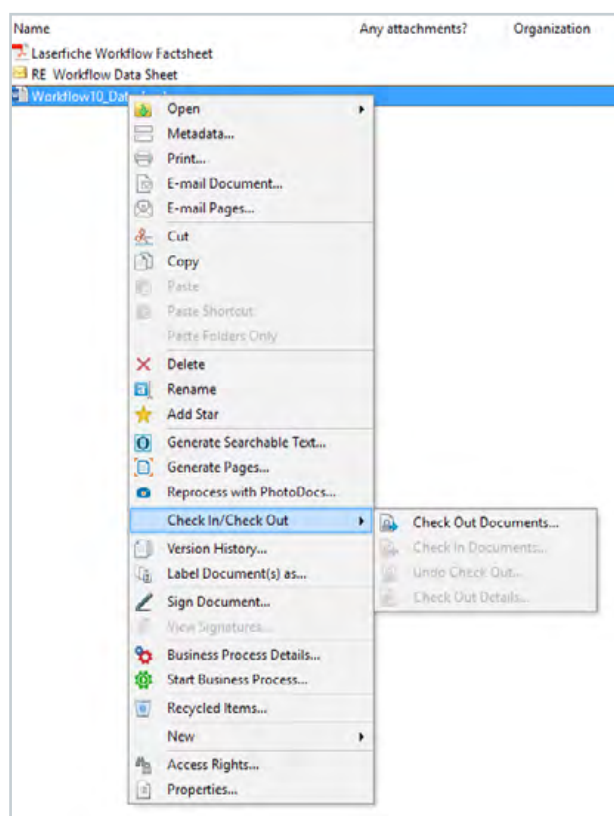
Working With Documents in Laserfiche



Check Out / Check In Documents

In order to ensure that two people do not edit the same document at the same time, you can use the Check Out/Check In option. Check out an electronic document when you are ready to work on it and check it back in when you are done. When a document is checked out, it is locked to all other users for editing.

If you are using the web client, an electronic document is checked out automatically when you select that you want to edit it. If you are using the Windows client, you will have to manually check out the document by right-clicking it and selecting the Check Out Documents option.

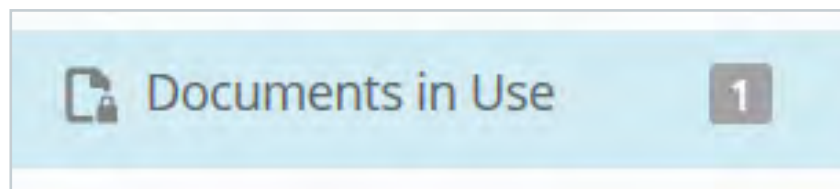


Checking out a document in the Windows client

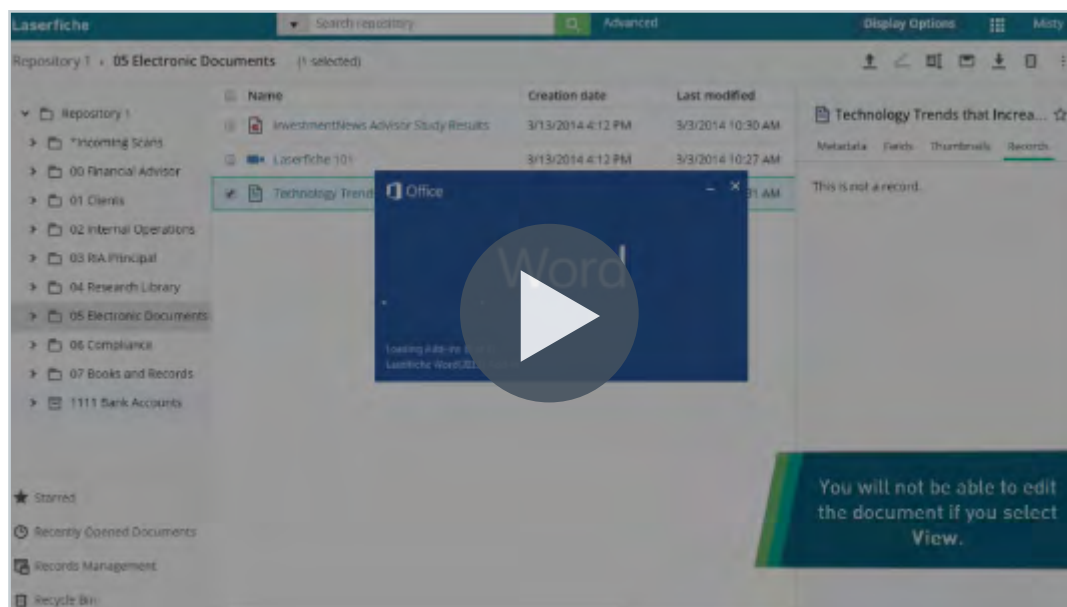
Checked out documents are stored on your hard drive in the My Laserfiche Documents folder within My Documents by default. Once you check a document back in, you will be asked whether you want to delete the copy from your computer.

In the web client only, selecting the Documents in Use option in the lower left-hand corner of the Folder Browser screen allows you to see all of your currently checked out documents.

Learn More: [Check In/Check Out White Paper](#)✳



The Documents in Use menu in the web client

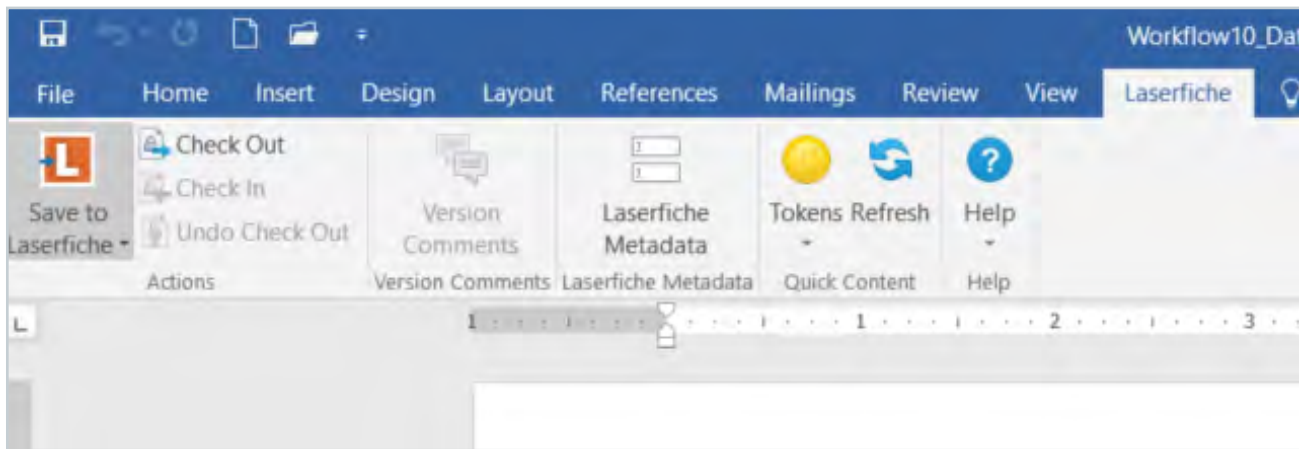


Video: Checking Out a Microsoft Office Document in Laserfiche

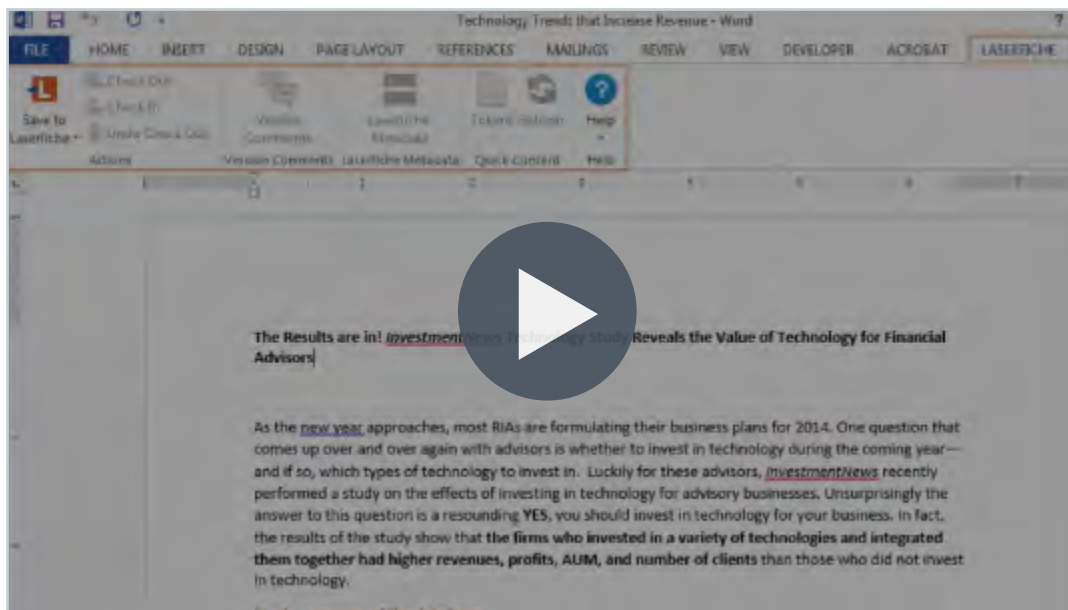
Work with Microsoft Office Documents

You can simplify working with Microsoft Word, Excel, and PowerPoint documents by using the Laserfiche toolbar within each application. This toolbar allows you to:

- Check the document in or out
- View the document's versions
- Store the document in Laserfiche
- View or modify the document's metadata



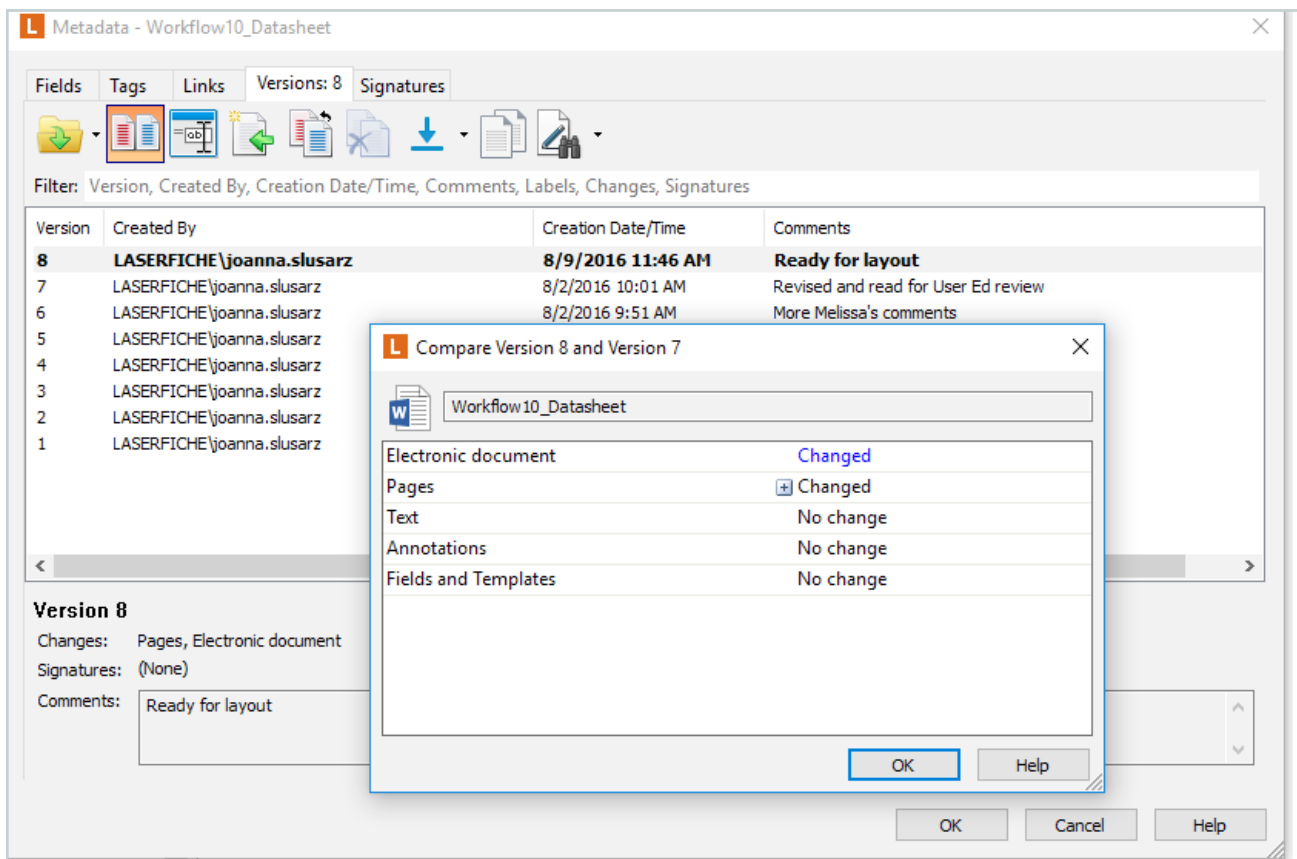
The Laserfiche toolbar makes working with Microsoft documents easy



Video: Laserfiche Microsoft Office Integration

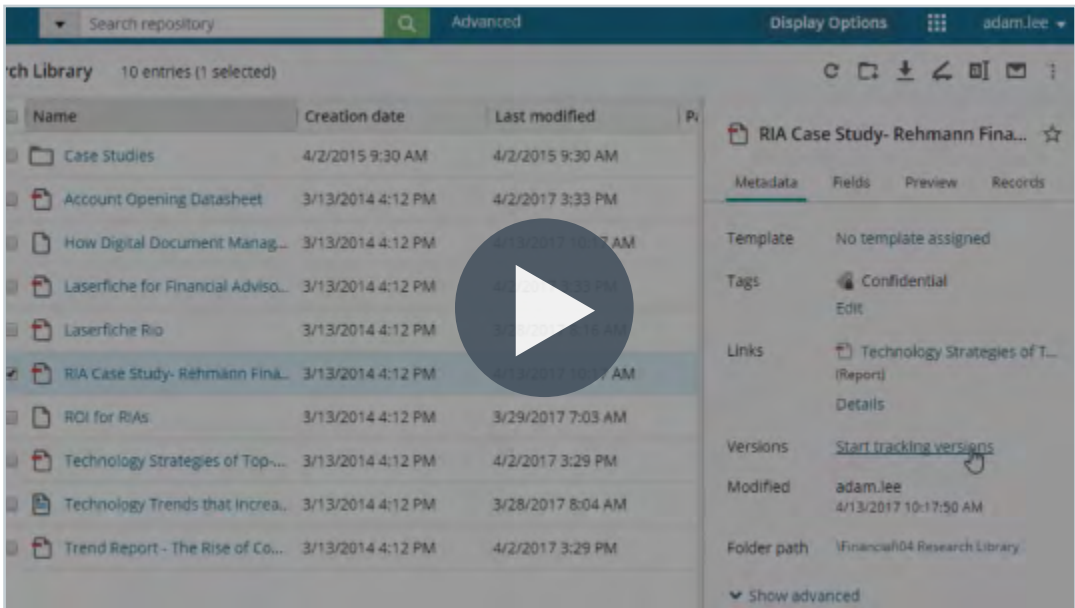
Keep Control of Document Versions

Laserfiche allows users to apply version control to any document or folder. When a document is under version control, all changes to the document text, annotations and metadata are tracked and saved as different versions. You can also view the version history, the differences between versions or revert to an older version from within the Versions menu in the document's metadata. When a folder is placed under version control, any new documents created in that folder will automatically also be placed under version control.



It is possible to view the changes between different document versions when a document is placed under version control

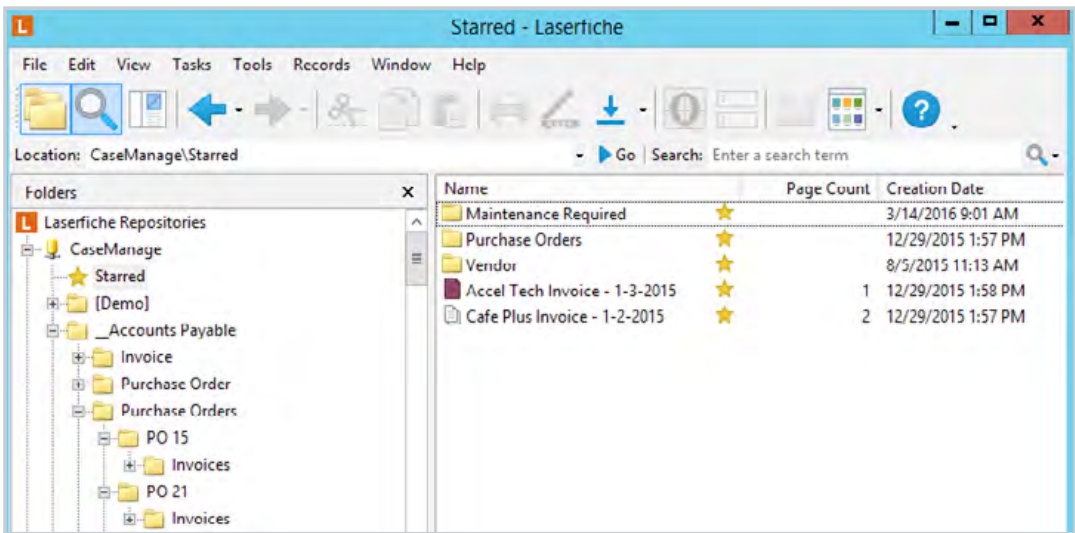
Read More: [Versioning Solution Exchange article](#)



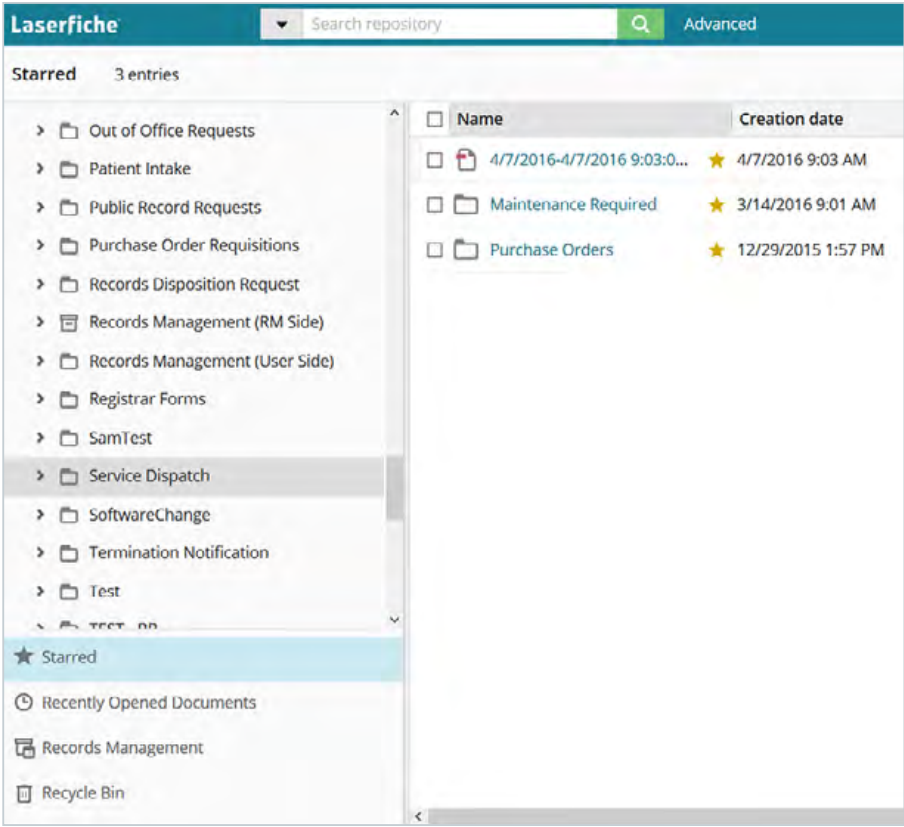
Video: Versions in Laserfiche

Bookmark Your Favorite Documents or Folders

You can add a star to any document or folder, and view them from the Starred menu for quick access.

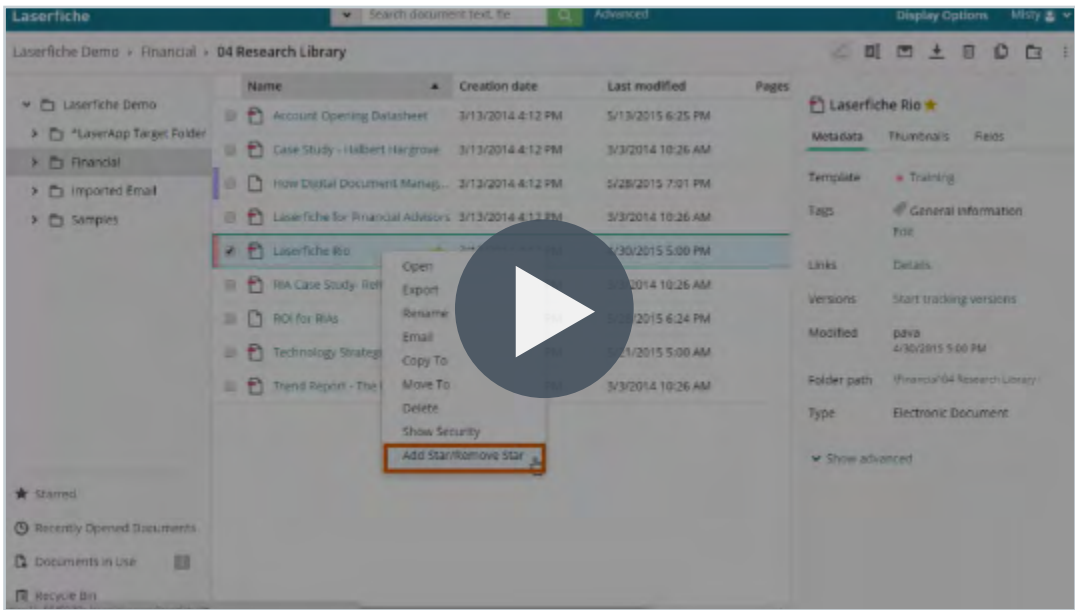


Starred documents in the Windows client



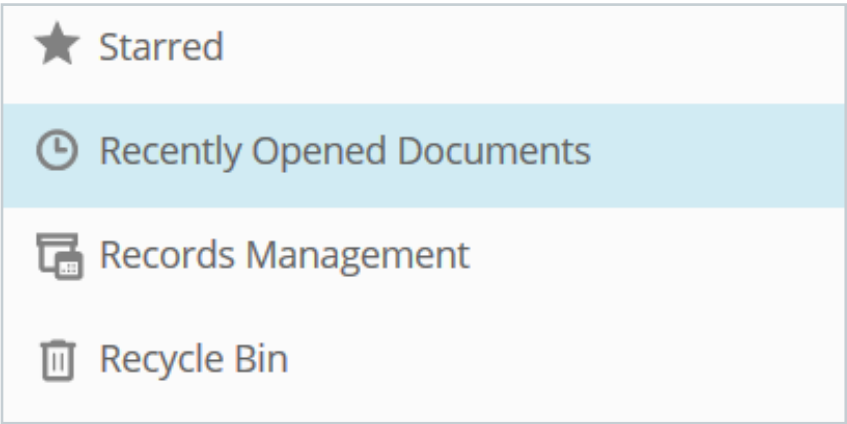
Starred documents in the web client

To add a star to a folder or document, right click the entry and select Add Star.

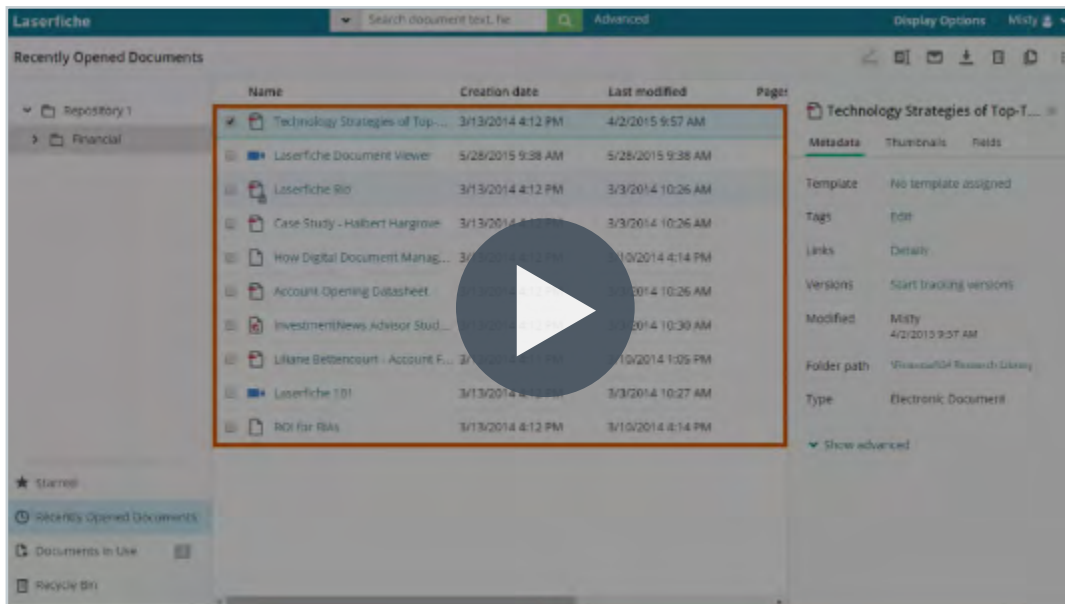


Video: Starring Documents and Folders in Laserfiche

In the Laserfiche web client, you can also view recently opened documents for quick access.



The Recently Opened Documents menu in the web client simplifies document access

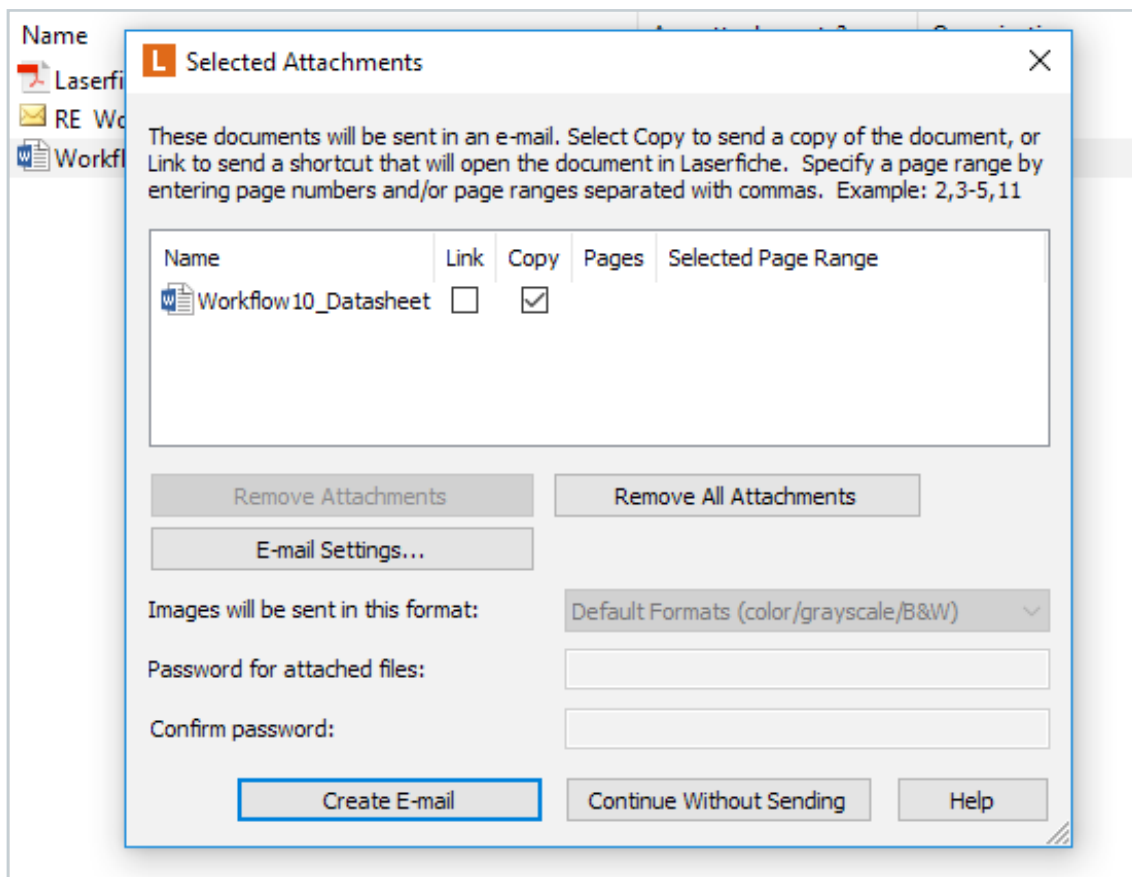


Video: Accessing Documents in Laserfiche

Email Documents

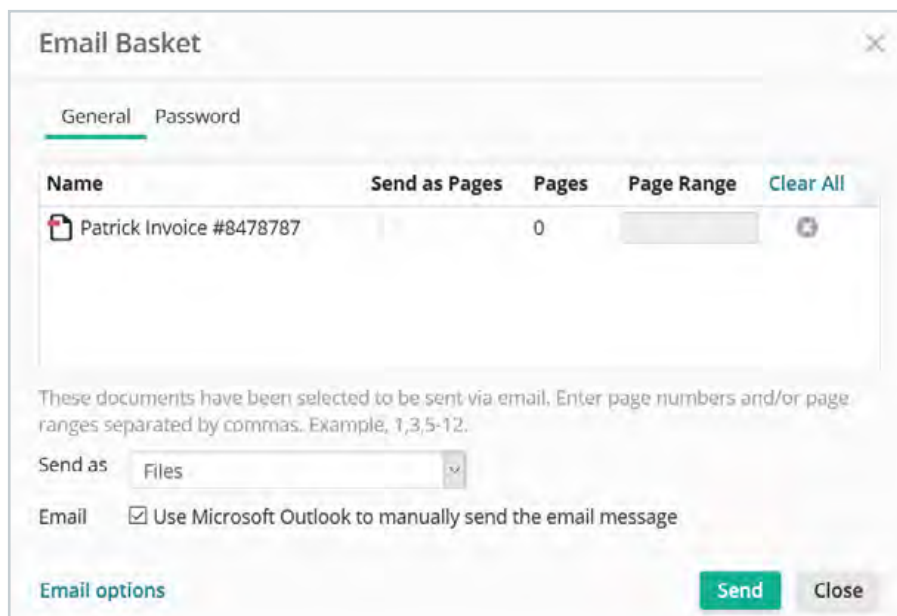
You can easily share documents with other Laserfiche users by emailing a link to the document in Laserfiche. If you would like to send the document to a user who does not have Laserfiche, you can also email a copy of the document directly from within Laserfiche.

To email a document from the Windows client, right-click on it and select E-mail Document.



In the Windows client, you can select to send either a copy of the document, a link to the document in Laserfiche, or both

In the Web client, right-click on the document and select Email.



The screenshot shows the 'Email Basket' dialog box with the 'General' tab selected. It contains a table with columns: Name, Send as Pages, Pages, Page Range, and Clear All. One document is listed: 'Patrick Invoice #8478787' with 0 pages. Below the table, there is a text box for 'Send as' set to 'Files', a checkbox for 'Use Microsoft Outlook to manually send the email message' which is checked, and a link for 'Email options'. At the bottom right are 'Send' and 'Close' buttons.

Name	Send as Pages	Pages	Page Range	Clear All
Patrick Invoice #8478787		0		

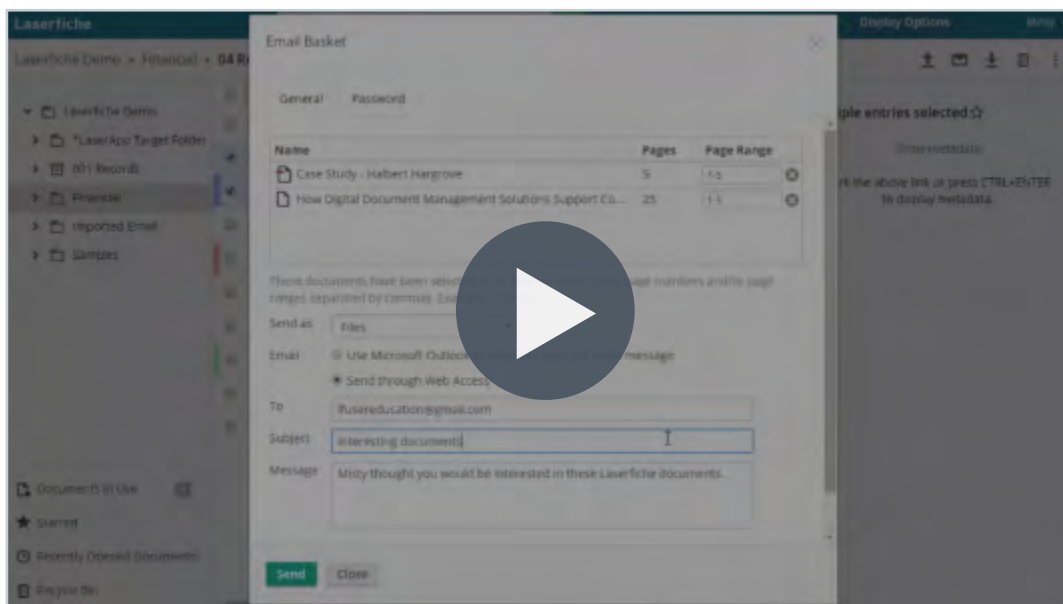
These documents have been selected to be sent via email. Enter page numbers and/or page ranges separated by commas. Example, 1,3,5-12.

Send as: Files

Email: ☒ Use Microsoft Outlook to manually send the email message

[Email options](#) Send Close

In the web client, you can send either a copy of the document (the file) or the link to the document in Laserfiche

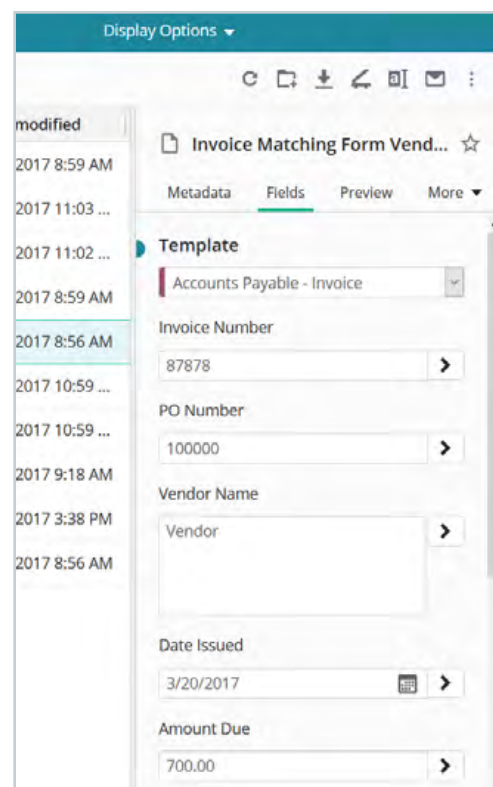


Video: Emailing Documents in Laserfiche

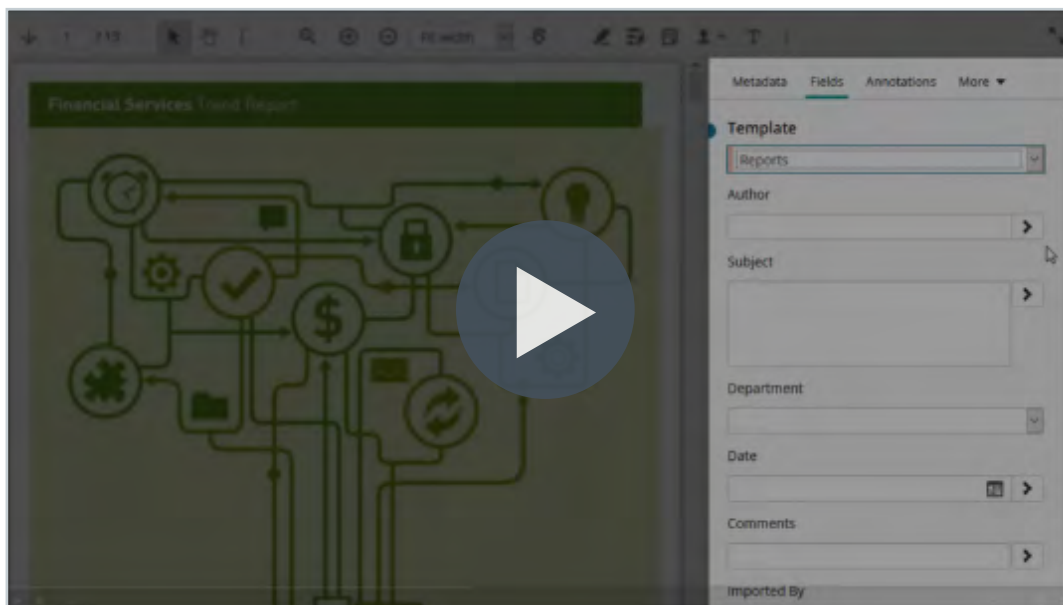
View and Edit Document Metadata

Documents and folders in Laserfiche usually have metadata associated with them. The most common form of metadata is fields. Fields contain identifying information about the document and can be grouped in templates.

You can view all of the metadata associated with a document or folder in the Metadata pane. In the Metadata pane, you can also edit the field values and add or remove fields.



The templates and fields section of the Metadata pane in the web client

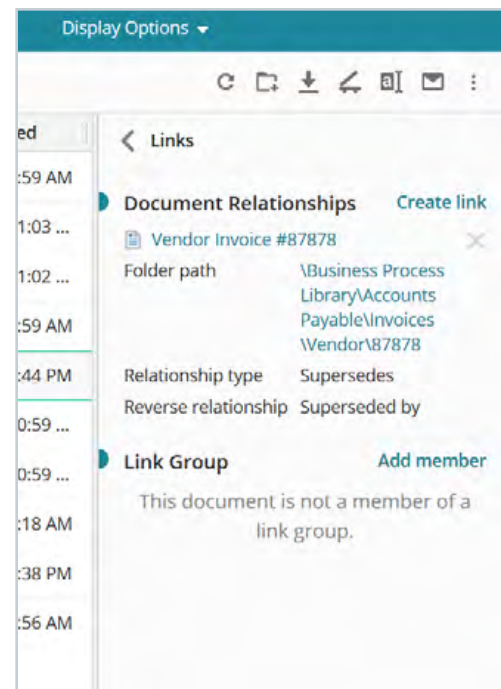


Video: Overview of Metadata

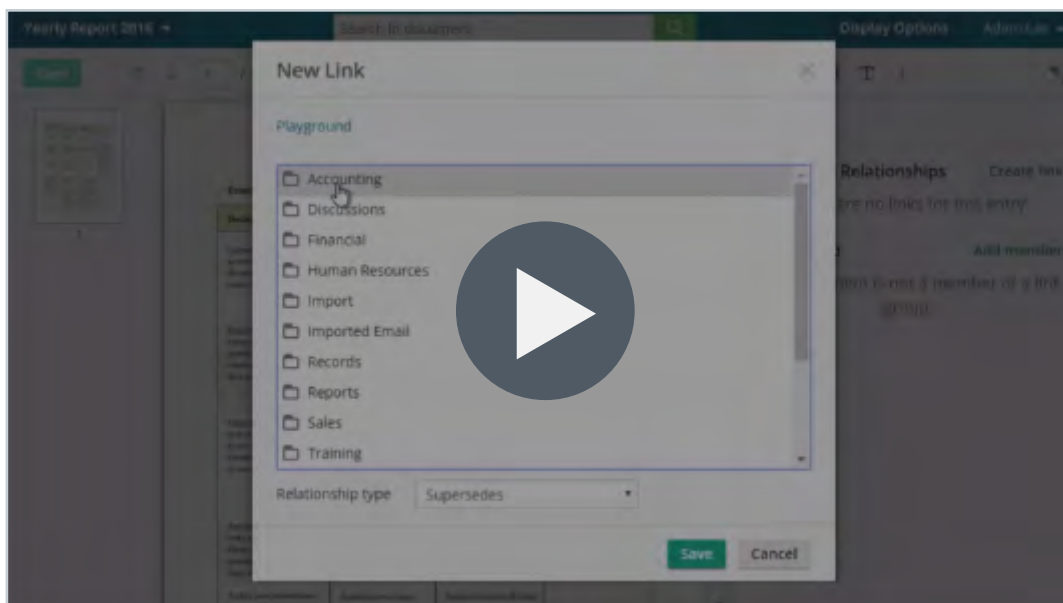
Other types of metadata include links and tags. There are two types of links:

- **Document relationships** - allows you to connect two related entries, such as an invoice and a purchase order
- **Link groups** - a group of related documents, such as all contracts for a particular vendor

You can access all document links from the metadata pane.



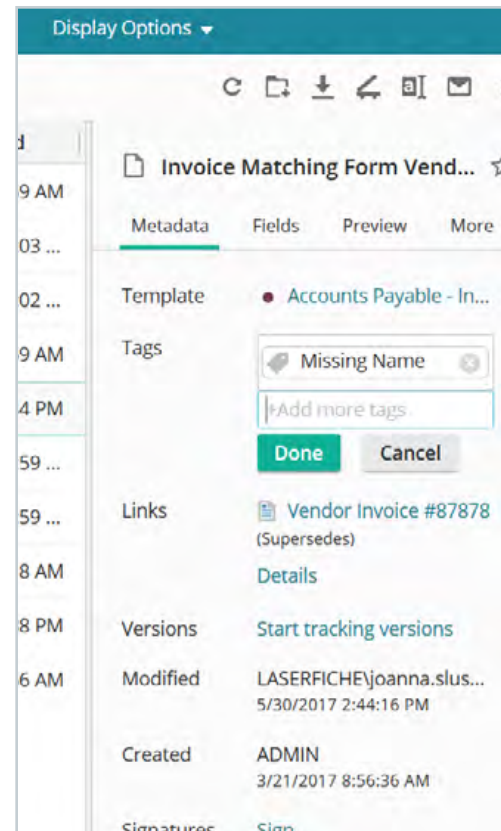
The Links section of the Metadata pane in the web client



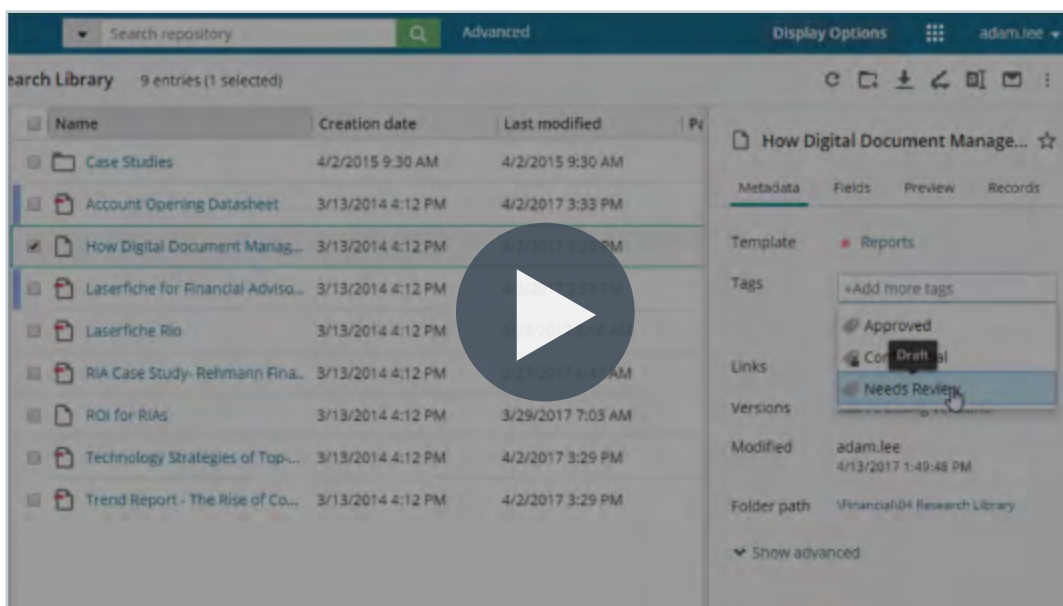
Video: Document Links

A tag can be used to categorize documents or folders. For example, you can tag all documents related to a particular project with a project tag. You can view, add, or delete tags in the Metadata pane.

Read More: [Manage Your Metadata White Paper](#)*



The Tags section of the Metadata pane in the web client



Video: Adding Tags to Documents or Folders in Laserfiche

Add Annotations to Documents

You can add annotations, such as sticky notes, text boxes, highlights, redactions, etc. to your TIFF documents. You can then view all annotations in the Annotations pane. You can only add annotations to TIFF images. Annotations are not available for PDFs or other electronic files.

Some of the most popular annotation types include:

- Stamps (text and image stamps)
- Sticky Notes
- Redactions
- Text Boxes

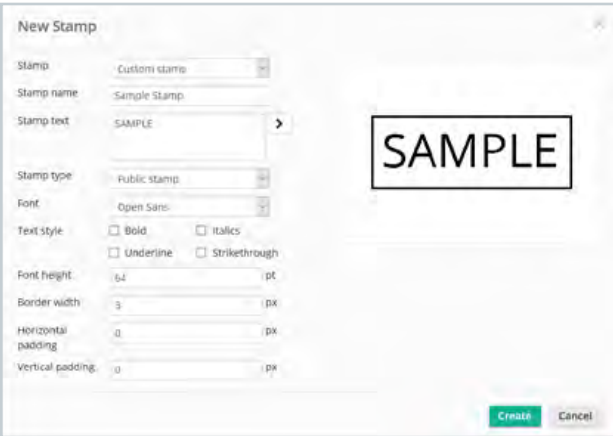
Stamps

A stamp is a small image that is overlaid on your document. You can create as many custom stamps as you like. Stamps can be text, an image, or dynamic text.

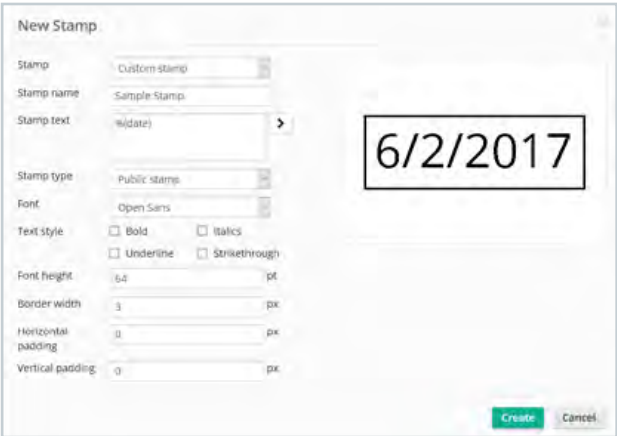
- Public stamps can be used by everyone
- Personal stamps can only be used by you

Once the stamp is applied, the text or image cannot be altered, but the stamp can be dragged to a different location in the document, resized, or deleted.

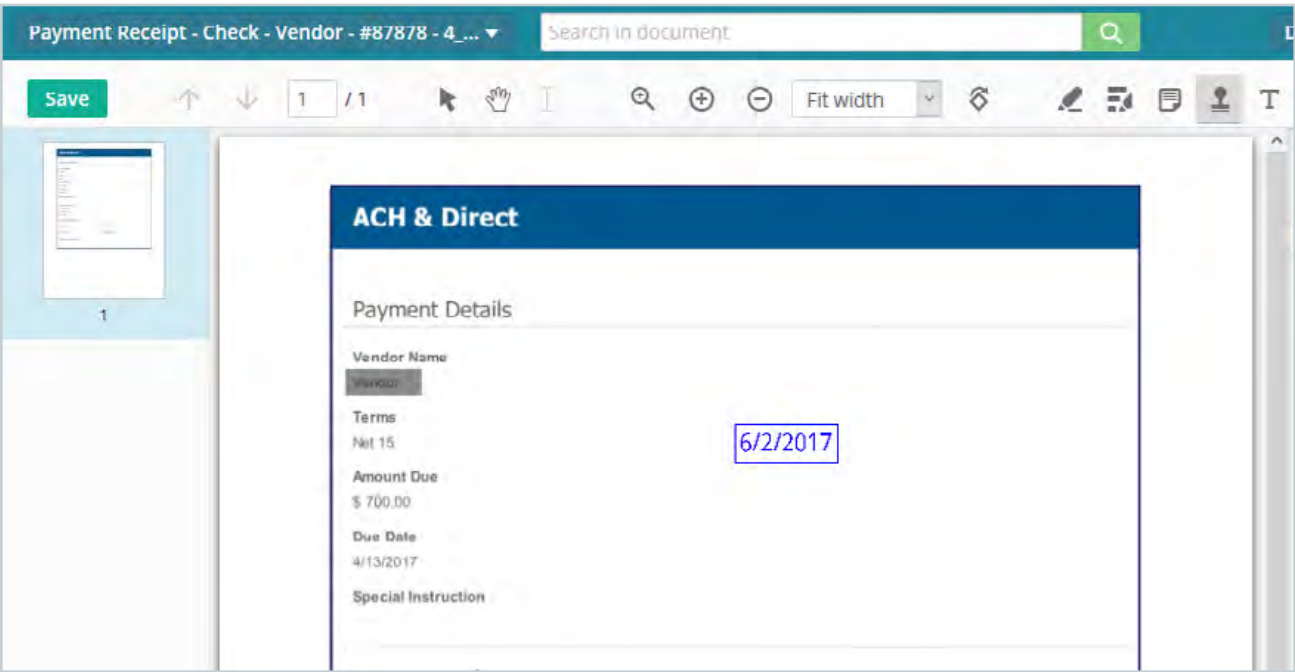
The image below is an example of a custom, dynamic stamp. In this case, the stamp contains the current date. You can add other variables to your stamp, by selecting the carat (>) icon next to the Stamp text box.



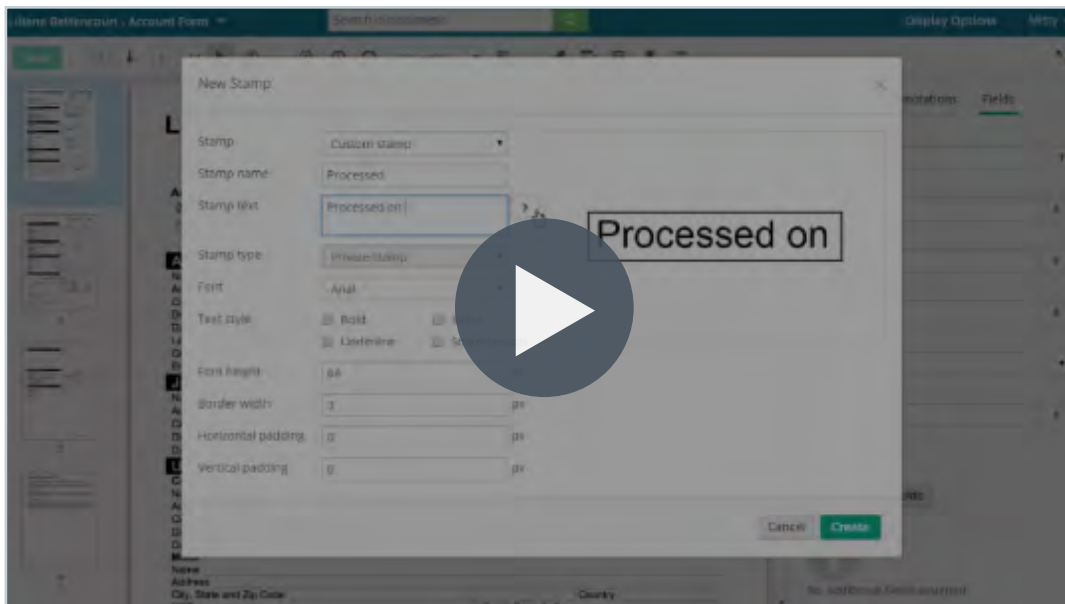
An example of a custom, public stamp in the web client



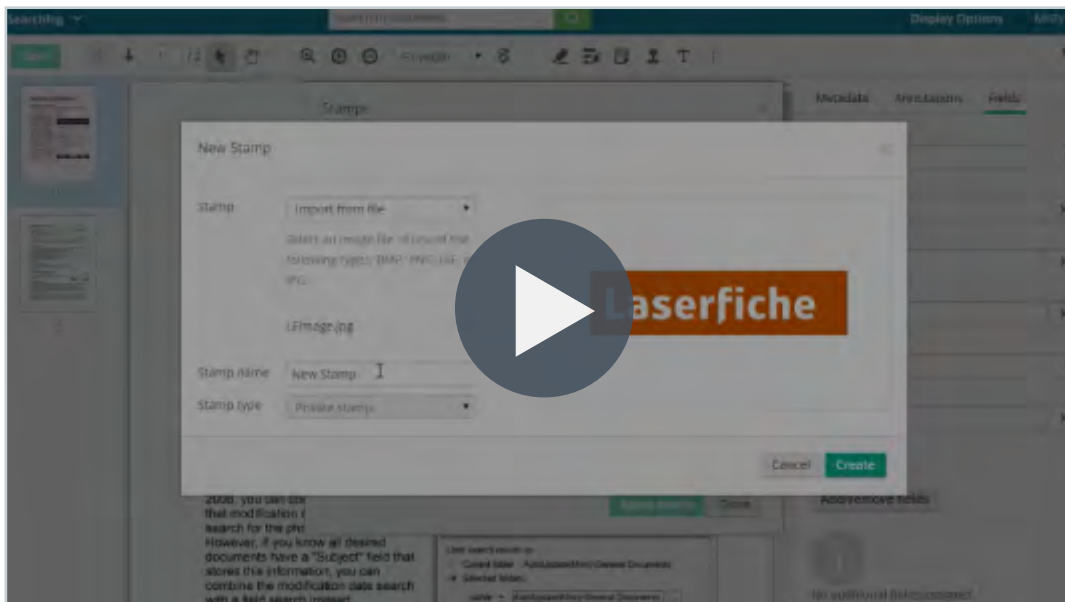
An example of a custom, dynamic stamp in the web client



The custom date stamp applied to a document in the web client



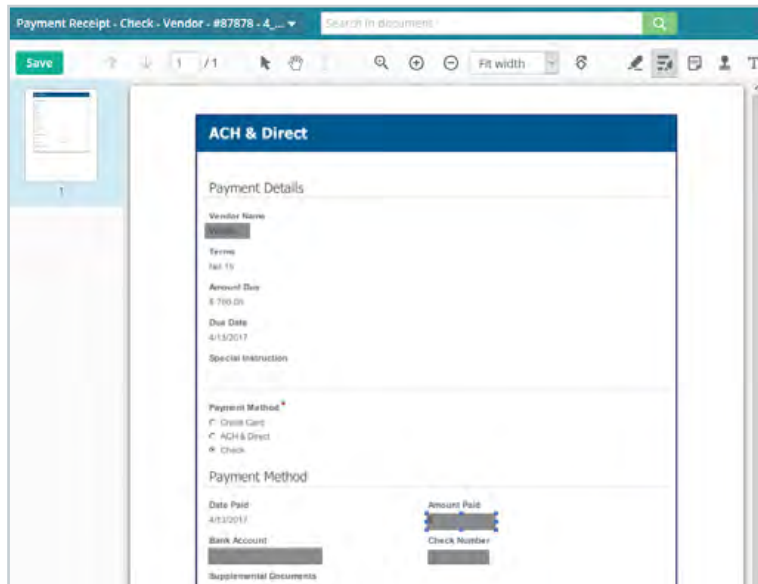
Video: Laserfiche Text Stamp Annotation



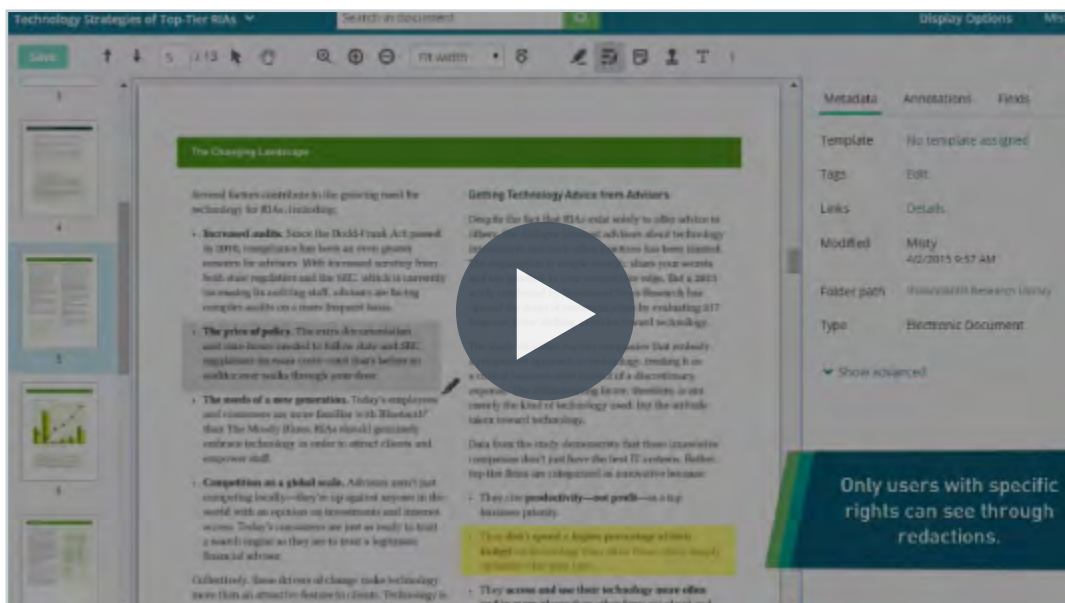
Video: Laserfiche Image Stamp

Redactions

Another type of annotation is a redaction. You can redact certain sections of a document, and the content will not be visible to anyone who is not authorized to view it. The redactions can be either black or white.



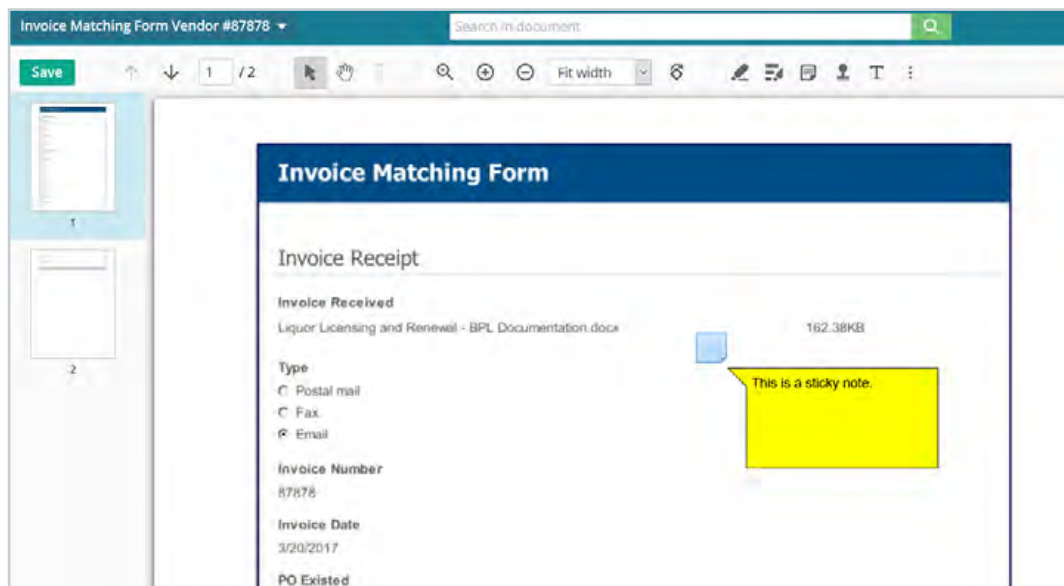
An example of redactions placed on a document in the web client



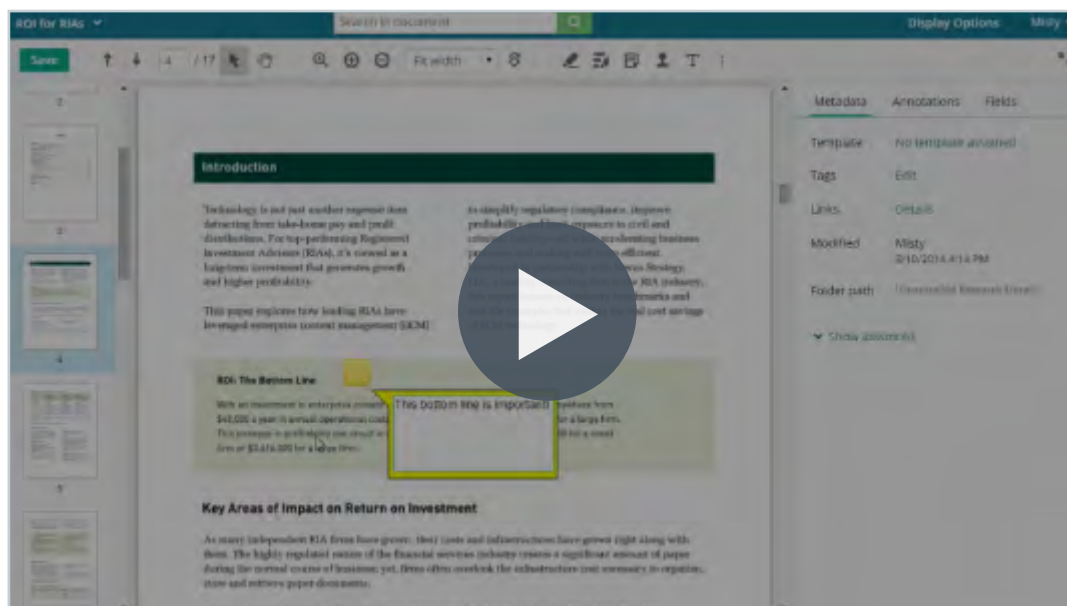
Video: Laserfiche Redaction Annotation

Sticky Notes

Sticky notes can be added to a document, much like a sticky note would be stuck on top of a piece of paper.



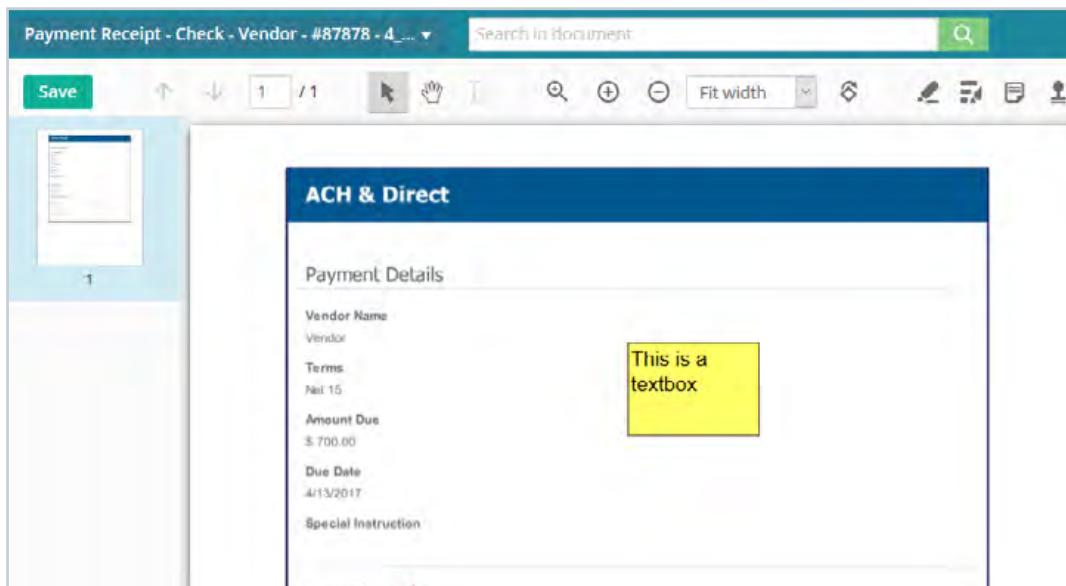
An example of a sticky note annotation with the text visible in the web client



Video: Laserfiche Sticky Note Annotation

Textboxes

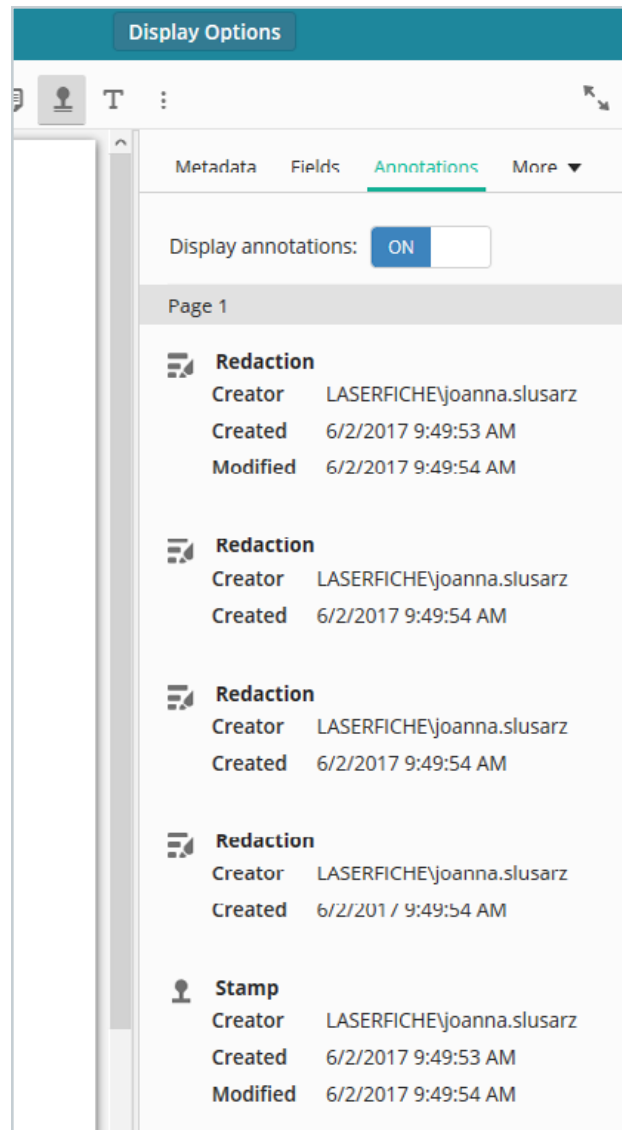
Unlike a sticky note, a textbox has the text always visible. Textboxes can be used for the same function as sticky notes. Unlike stamps, the text in sticky notes and textboxes can be altered at any time.



An example of a textbox annotation in the web client

You can view a list of all annotations on a particular document by opening the Annotations pane. From there you can see the details of each annotation. Clicking on an annotation will take you directly to the place in the document where it is located.

Read More: [Annotations White Paper](#)✱



The Annotations pane in the web client

Organize Documents or Folders

In Laserfiche, you can organize your documents and folders by creating new ones, or copying and renaming existing ones. To create a new folder in the web client, click on the Folder icon in the upper right hand pane.



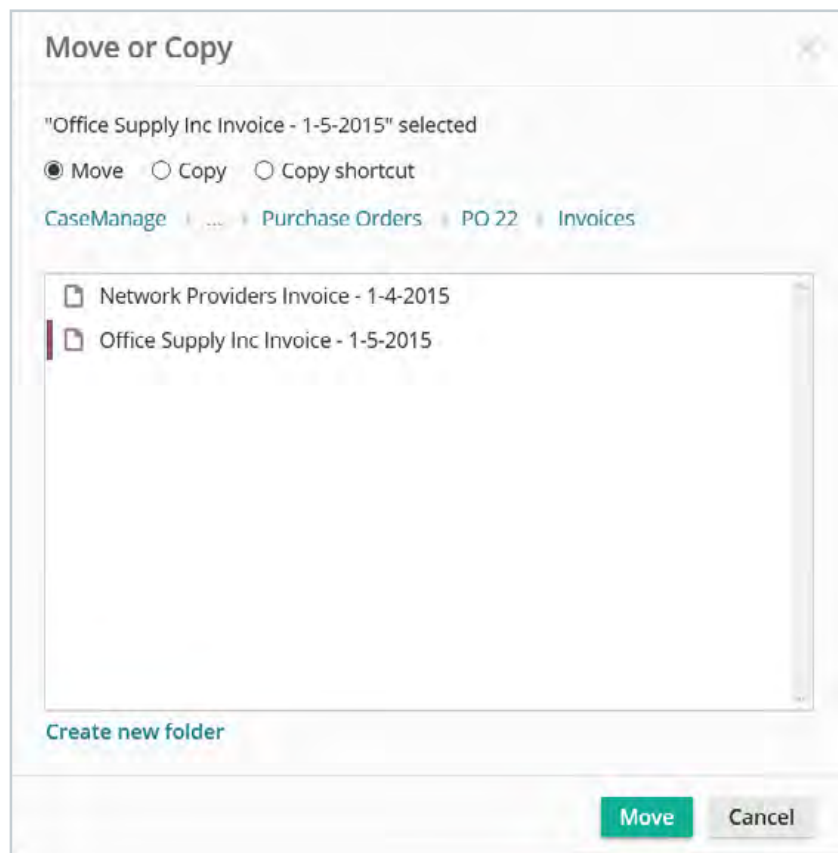
The New Folder button in the web client

In the Laserfiche Windows client you can right-click anywhere in the Folder Browser, navigate to New and then Folder. You can also select New – Folder from the File menu.

You can easily move or copy existing documents to a newly created folder in the web client by selecting the document, right-clicking, and choosing the Move or Copy option.

- 1.** In the dialog box, you can choose to move, copy or copy a document shortcut.
- 2.** Double-click on the repository name in the folder path and navigate to the folder where you would like the new document to be located.
- 3.** Once the folder is selected, click the green Move or Paste button, depending on the action chosen.

You can also drag and drop the document into the appropriate location.

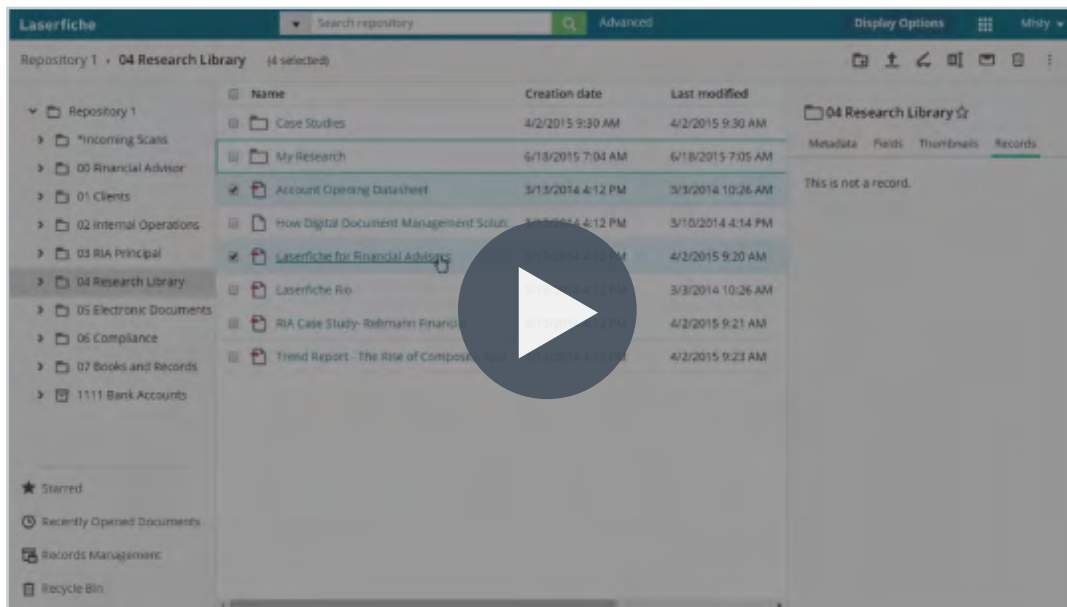


The Move or Copy dialog box in the web client

To move existing documents to a new folder in the Laserfiche Windows client, select the entry and drag it into the appropriate folder.

You can easily move or copy existing documents to a newly created folder in the web client by selecting the document, right-clicking, and choosing the Move or Copy option.

1. To copy it, select the entry, right-click and check Copy.
2. Navigate to the repository location where you want the entry copied to, right-click and select Paste.



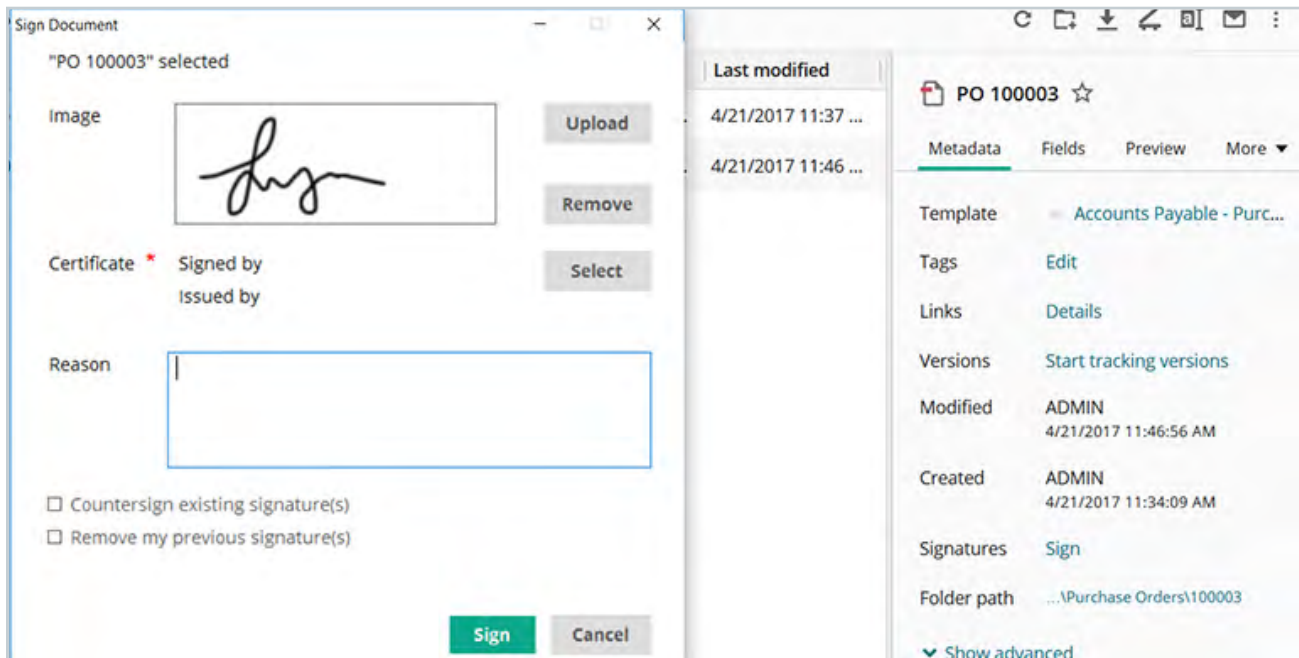
Video: Organizing Documents and Folders in Laserfiche

Digitally Sign Documents

Laserfiche supports the ability to apply digital signatures to documents. You can also view who signed a document and if the document has been altered since it was signed.

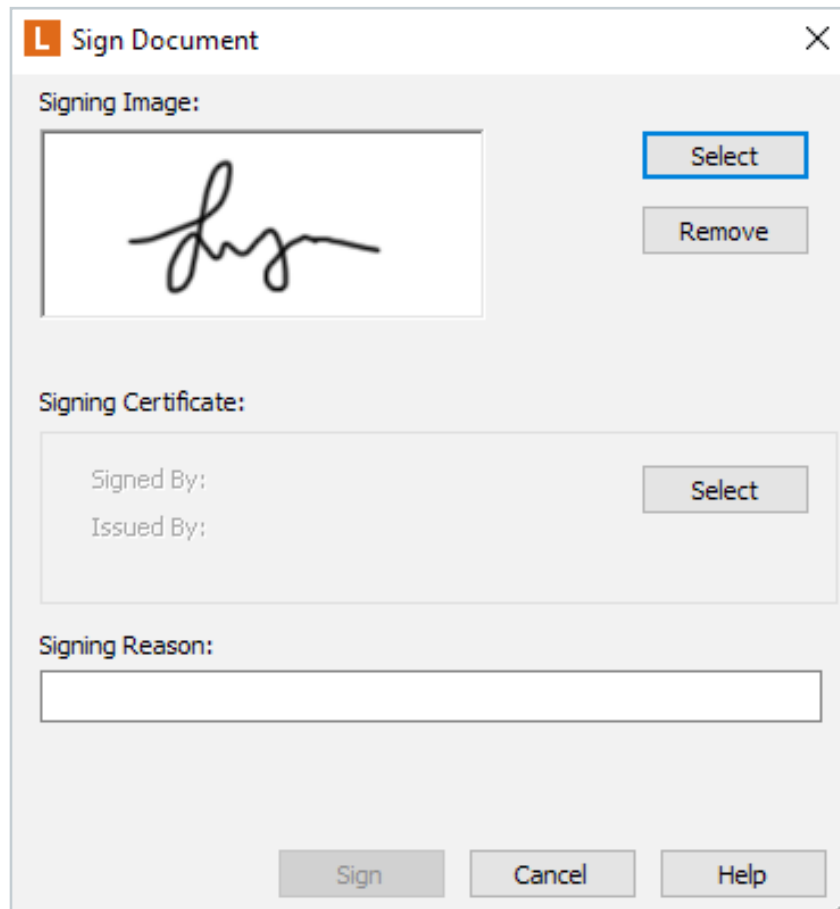
The first time that you want to sign a document via the web client you may be prompted to download a special plug-in.

To digitally sign a document, open the document's Metadata pane and click on Sign.



Digitally signing a document in the web client

In the Laserfiche Windows client, right-click the document you want to sign and navigate to Sign Document.



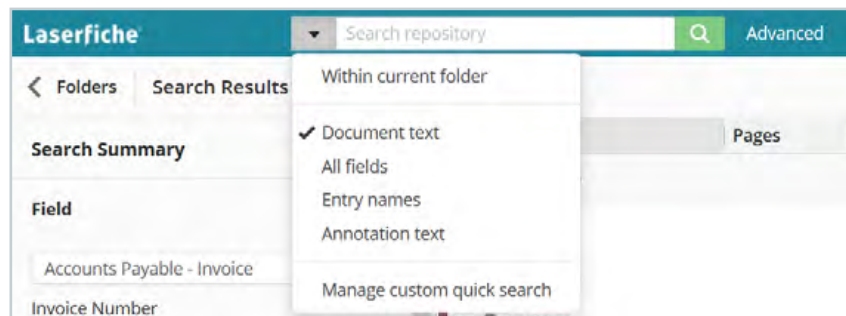
Digitally signing a document in the Windows client

Searching

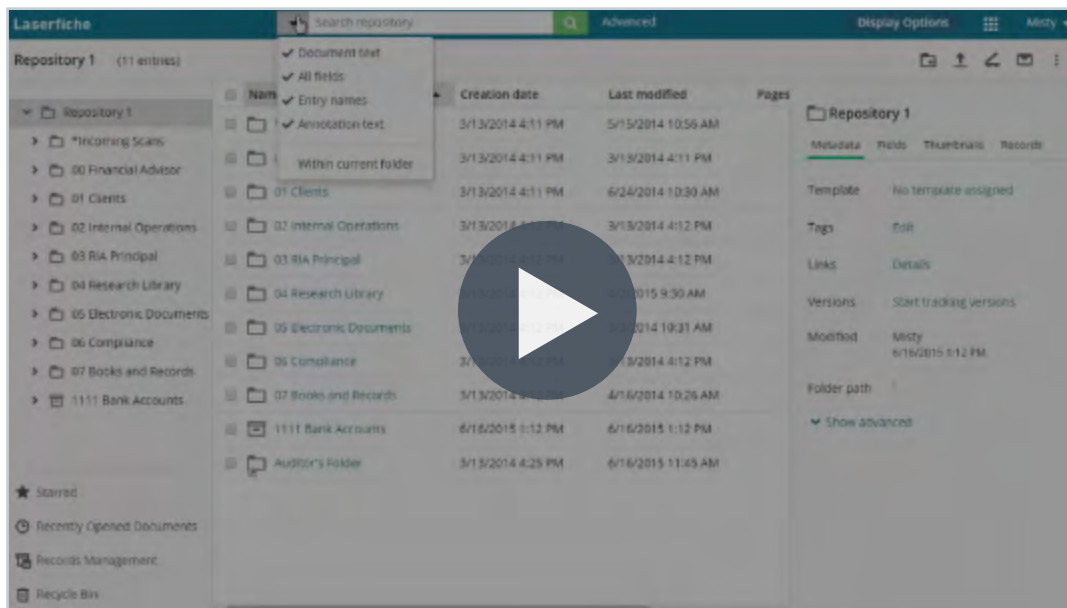
Laserfiche offers a variety of search options.

The most commonly used option is the Quick Search, which is accessible via the search bar in the top of the Folder Browser pane. The Quick Search allows you to search with a few different options:

- Within current folder
- Document text
- All fields
- Entry names
- Annotation text



The Quick Search options in the web client

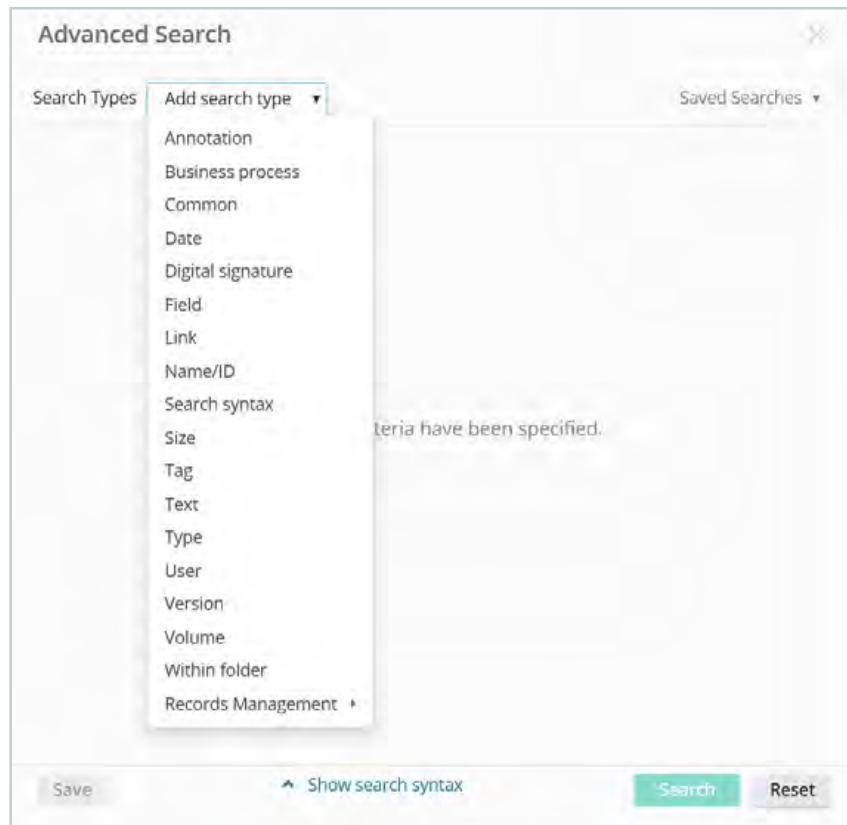


Video: Laserfiche Quick Search

Sometimes, the basic Quick Search is not as specific as you may like. In cases like these, Laserfiche allows for more advanced searches. In the web client, click the Advanced label next to the search bar to open the Advanced search options. From there, you can select the appropriate search type.

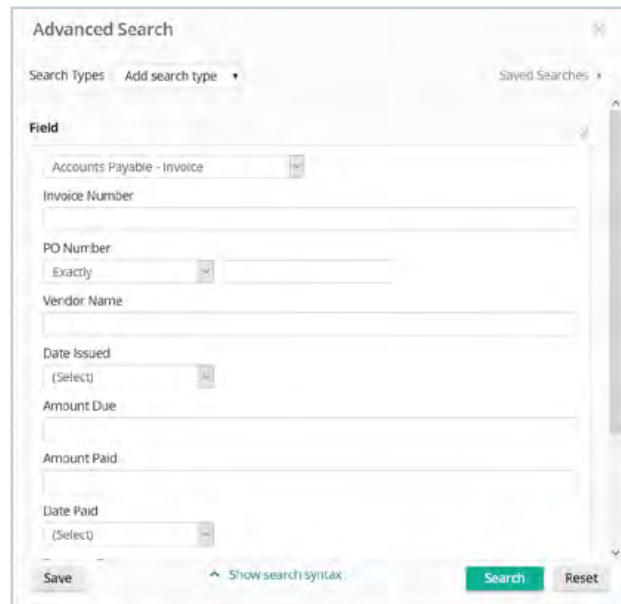
Some of the most popular searches include:

- Field and template
- Text
- Within Folder
- Name
- Date
- Type



The advanced search options in the web client

For a **Field search**, you can select either a template or fields. If you select a template and leave it blank, the search will return all documents with that template.

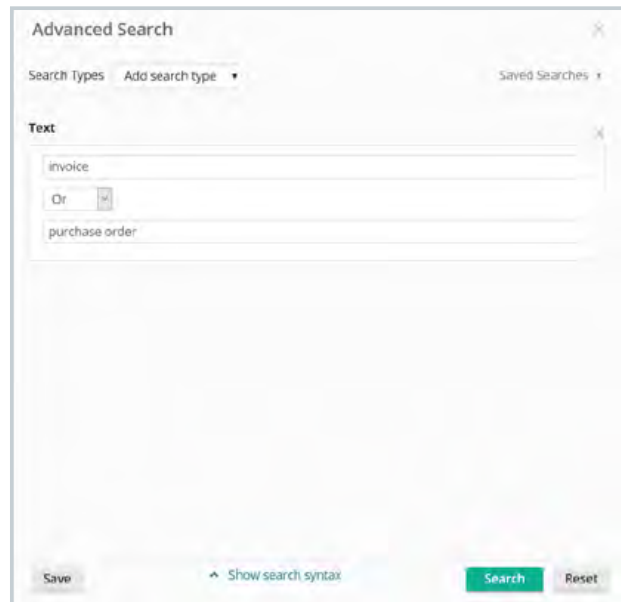
The screenshot shows the 'Advanced Search' window in the Laserfiche web client. The 'Field' tab is selected. At the top, there are 'Search Types' and 'Add search type' buttons, and a 'Saved Searches' dropdown. The main area contains several search fields: 'Accounts Payable - Invoice' (with a dropdown arrow), 'Invoice Number', 'PO Number' (with an 'Exactly' dropdown), 'Vendor Name', 'Date Issued' (with a '(Select)' dropdown), 'Amount Due', 'Amount Paid', and 'Date Paid' (with a '(Select)' dropdown). At the bottom, there are 'Save', 'Show search syntax', 'Search' (in a green button), and 'Reset' buttons.

The template and field search in the web client

To **remove a search type**, click on the X in the upper right-hand corner.

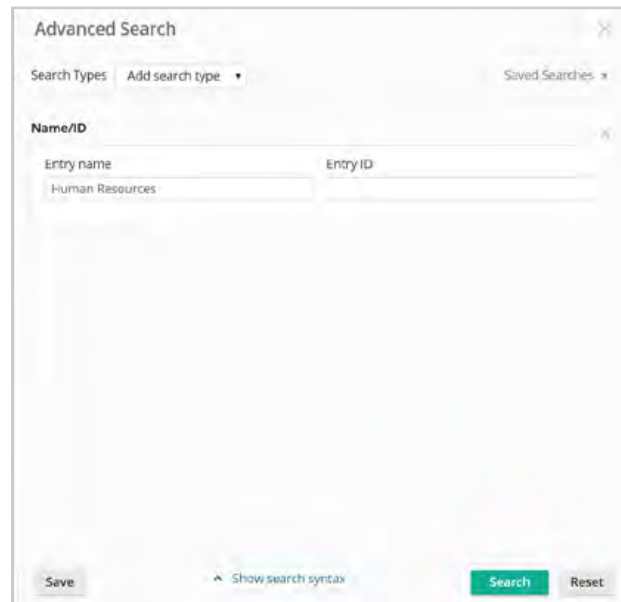
A Text search searches any documents for a key word or phrase. You can perform And/Or/Not/Within searches.

A TIFF file must be OCR'd in order for the Text search to return results.

The screenshot shows the 'Advanced Search' window in the Laserfiche web client. The 'Text' tab is selected. At the top, there are 'Search Types' and 'Add search type' buttons, and a 'Saved Searches' dropdown. The main area contains two text input fields: 'invoice' and 'purchase order'. Between them is an 'Or' dropdown menu. At the bottom, there are 'Save', 'Show search syntax', 'Search' (in a green button), and 'Reset' buttons.

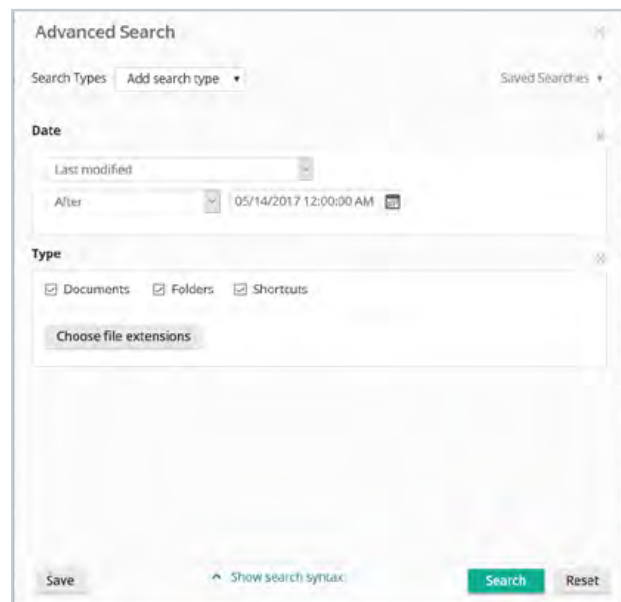
The Text search in the web client

A **Name/ID search** searches only the document or folder name or entry ID.

The screenshot shows the 'Advanced Search' window in the Laserfiche web client. At the top, there's a 'Search Types' dropdown set to 'Add search type' and a 'Saved Searches' link. Below this, the 'Name/ID' search type is selected. It features two input fields: 'Entry name' with the text 'Human Resources' and 'Entry ID' which is currently empty. At the bottom of the window, there are buttons for 'Save', 'Show search syntax', 'Search' (highlighted in green), and 'Reset'.

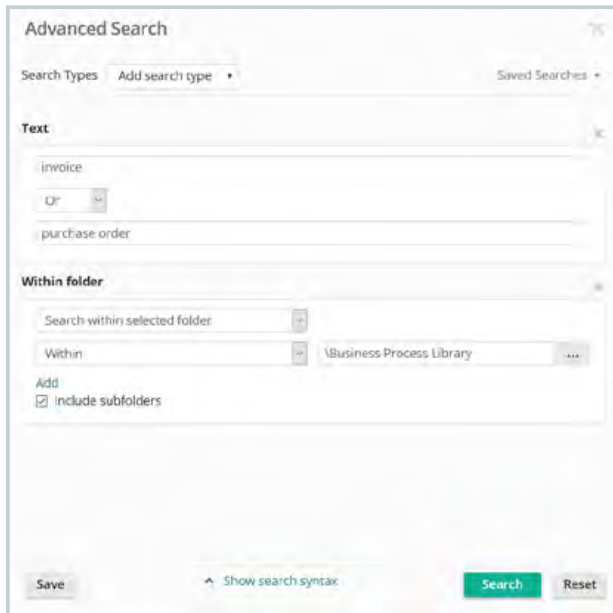
The Name/ID search in the web client

A **Date search** enables you to find documents or folders based on the last modified or created dates. You can specify if you are looking for folders, documents, or shortcuts by joining the Date search with the Type search.

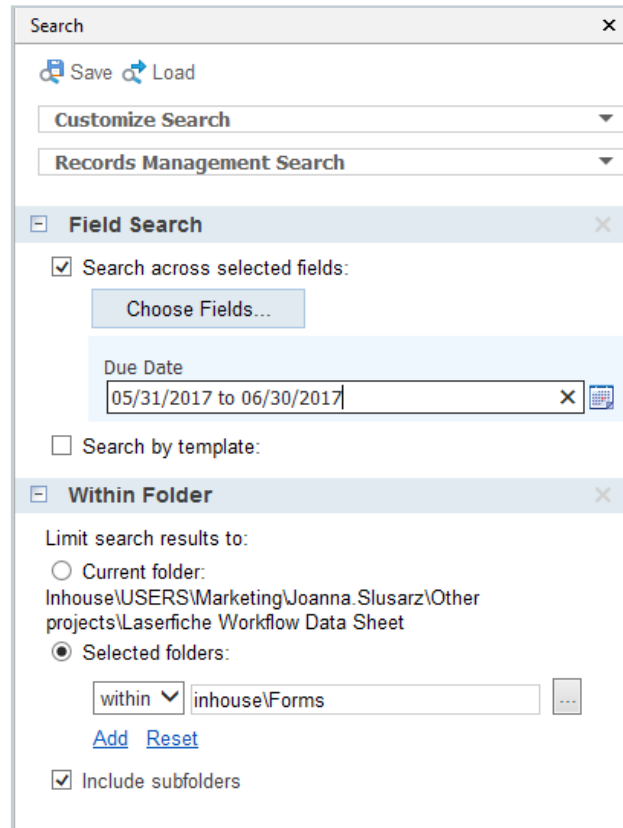
The screenshot shows the 'Advanced Search' window with the 'Date' and 'Type' search types selected. Under the 'Date' section, 'Last modified' is chosen from a dropdown, and the date '05/14/2017 12:00:00 AM' is entered in the 'After' field. The 'Type' section has checkboxes for 'Documents', 'Folders', and 'Shortcuts', all of which are checked. There is also a 'Choose file extensions' button. The bottom of the window features 'Save', 'Show search syntax', 'Search' (green), and 'Reset' buttons.

A Date and Type search in the web client

A **Within Folder search** narrows the search to a specific folder. To get more specific results, you can join different search types together, such as a Text search and a Within Folder search.

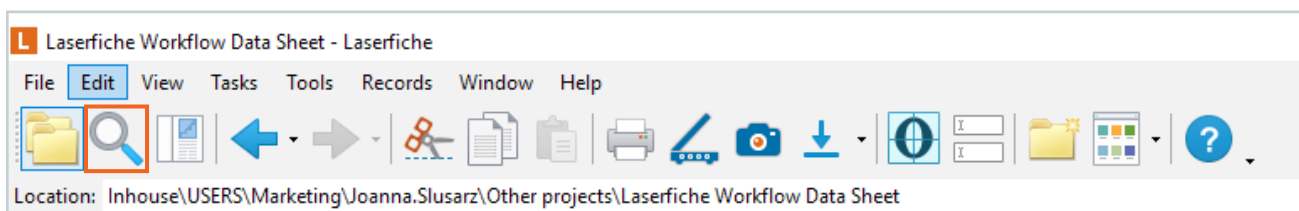


The Text search joined with the Within Folder search in the web client

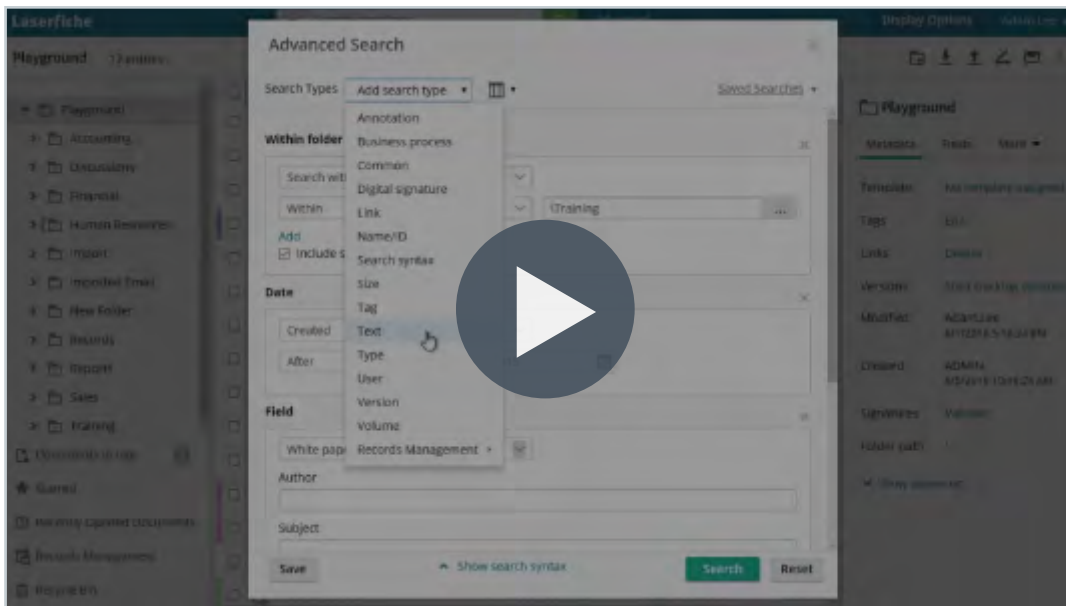


The Field search combined with the Within Folder search in the web client

In the Laserfiche Windows client, the Advanced search is accessible via the **magnifying glass button** in the toolbar.



The advanced search button in the Windows client



Video: Laserfiche Search Types

Read More: [Getting Started with Searching in Laserfiche white paper](#)✳

Chapter 4

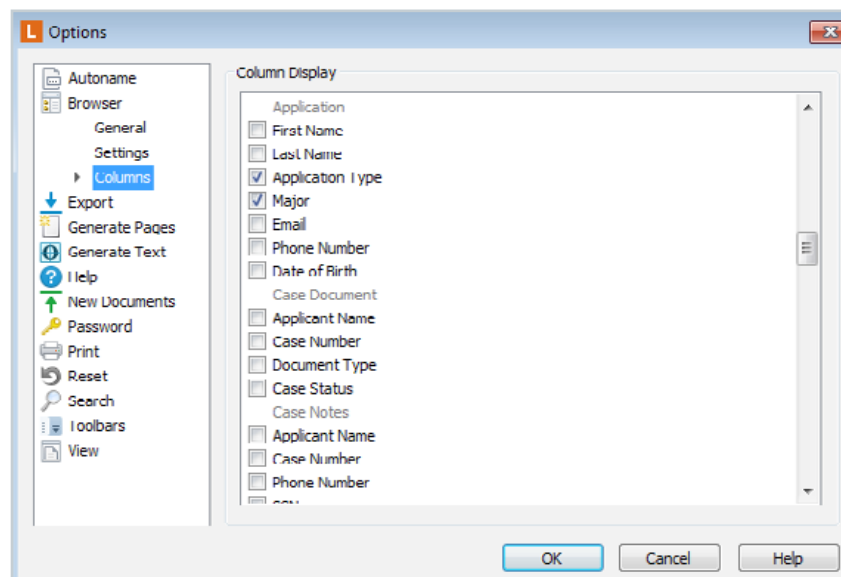
Laserfiche Tips & Tricks



Customize the Column View

The Laserfiche Windows and web clients allow you to customize your column display for each folder by creating and saving column profiles. Once created, a user can switch between them easily.

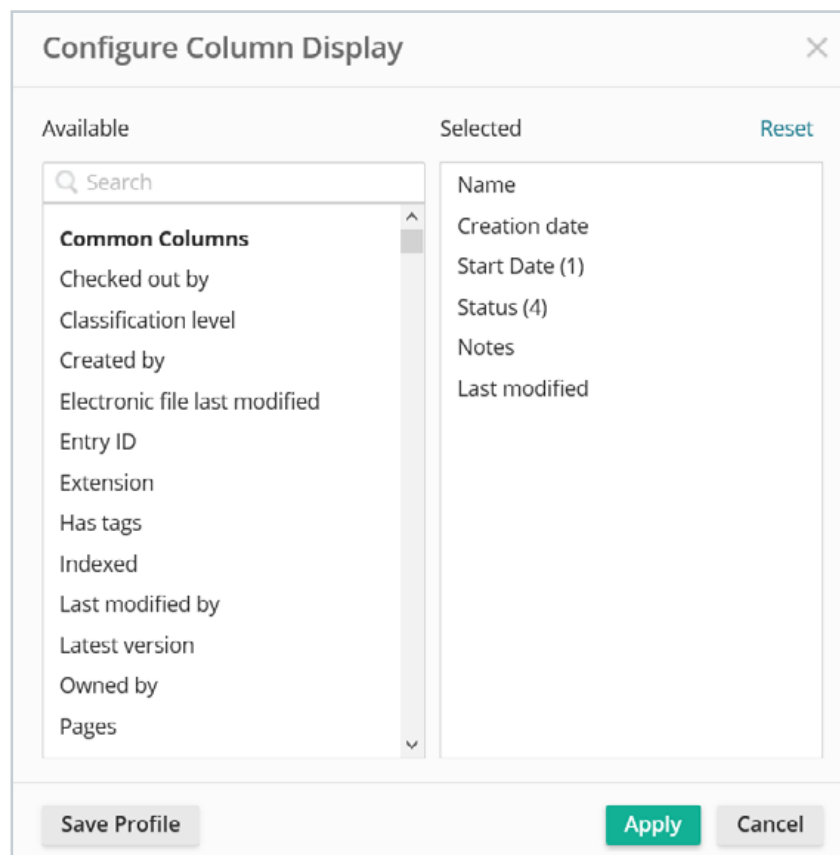
In the Windows client, open the folder where you store the documents, right-click anywhere in the column headers and select More. You will notice that some of the columns will be checked already. Scroll down the list and uncheck the columns you do not want, and check the columns you want to view. Click OK.



The column picker in the Windows client

To save this column profile, right-click in the column header and select Load/Save Columns – Save. Name the column profile and click OK. Your profile has been saved.

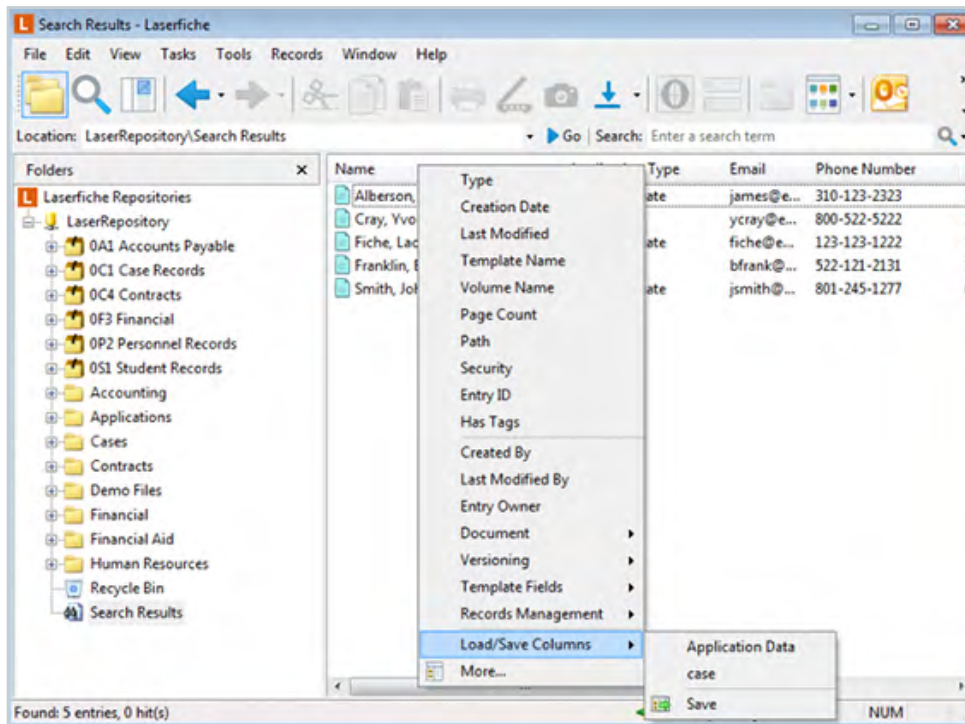
In the web client, click on Display Options and select Column Picker. Add or remove your columns and click Save Profile. You can also get to the Configure Column Display menu by right-clicking on the column headers and selecting the Column Picker.



The column picker in the web client

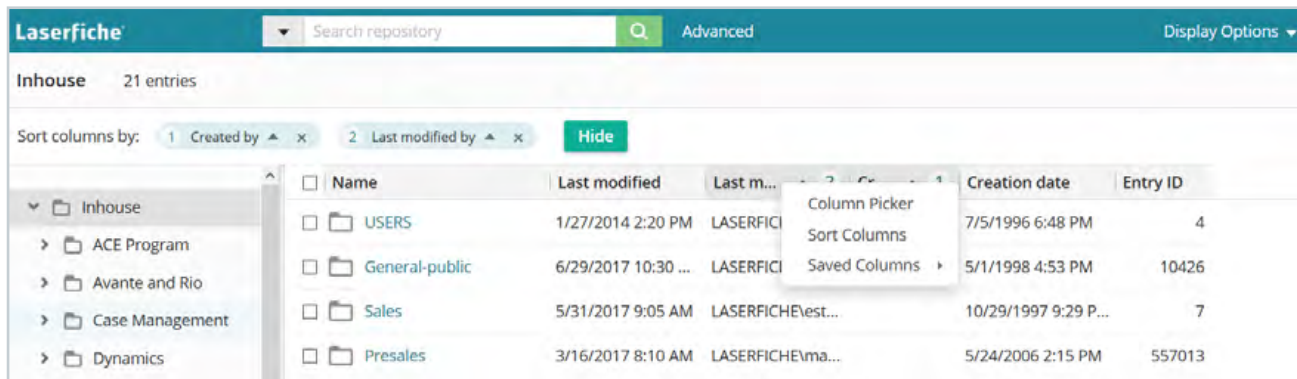
Follow the same directions for creating another column profile.

After saving it, you'll be able to quickly switch between column views by right-clicking in the column headers and selecting Load/Save Columns along with the name of your profile (in the Windows client) and Saved Columns along with the name of your profile (in the web client).

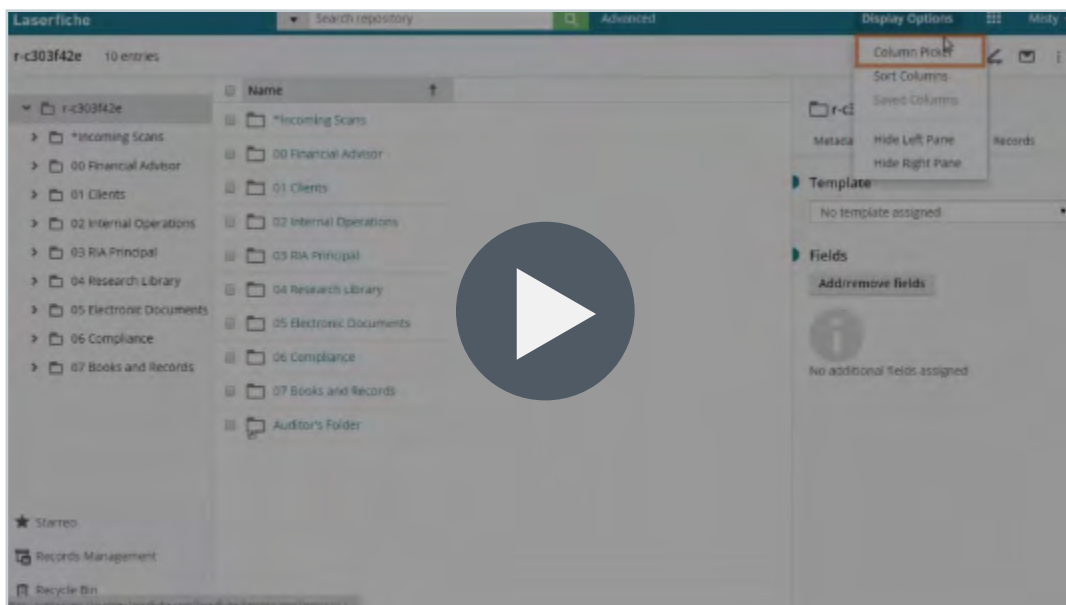


Loading a saved column profile in the Windows client

You can also load a column profile in the web client by clicking on Display Options and selecting Saved Columns. From there, select the column profile that you would like to use. Additionally in the web client, you can set a default column sort order by clicking on Sort Columns from the Display Options menu. You can also sort by more than one column by right-clicking in the column headers, selecting Sort Columns and clicking on the various column headers.



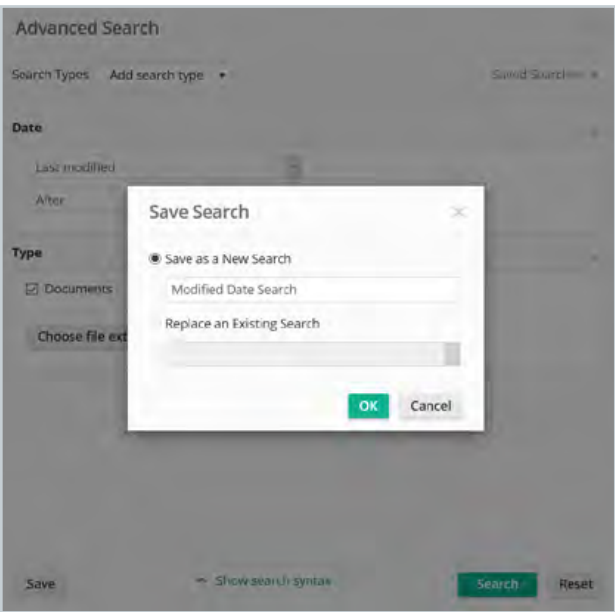
Configuring a multi-column sort in the web client



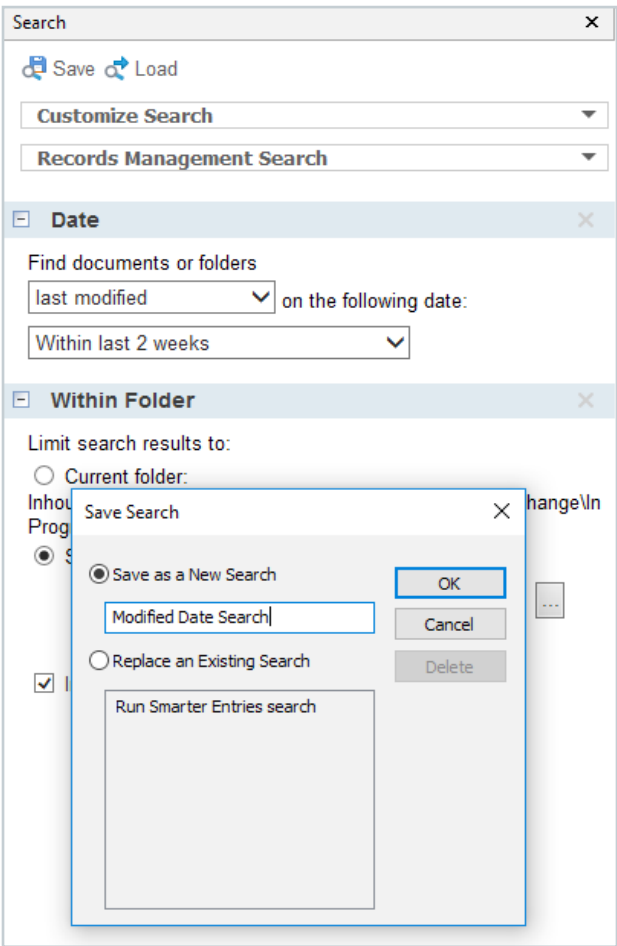
Video: Laserfiche Column Profiles

Save a Search

If you perform the same search regularly, you can save it as a Saved Search. This search will then be accessible from within the Saved Searches menu in the Advanced Search window.

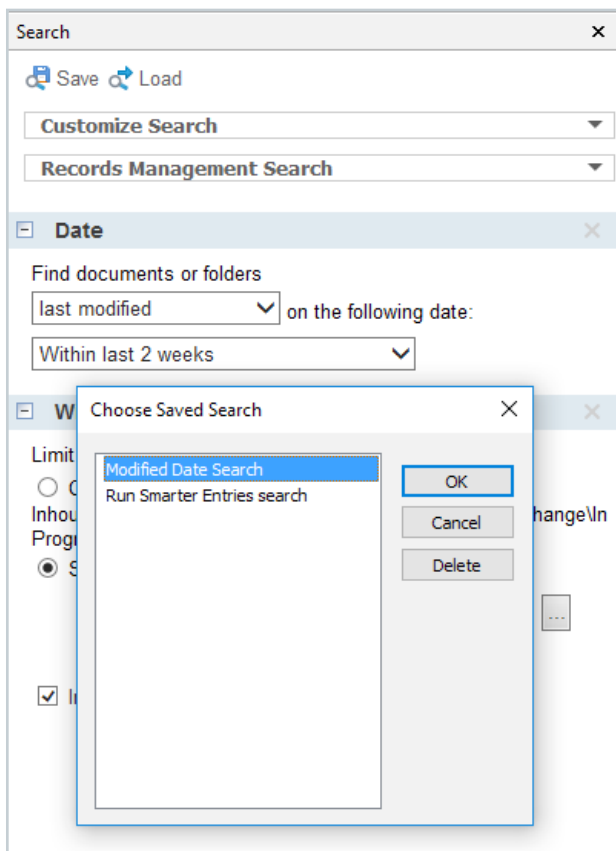


Saving a search in the web client



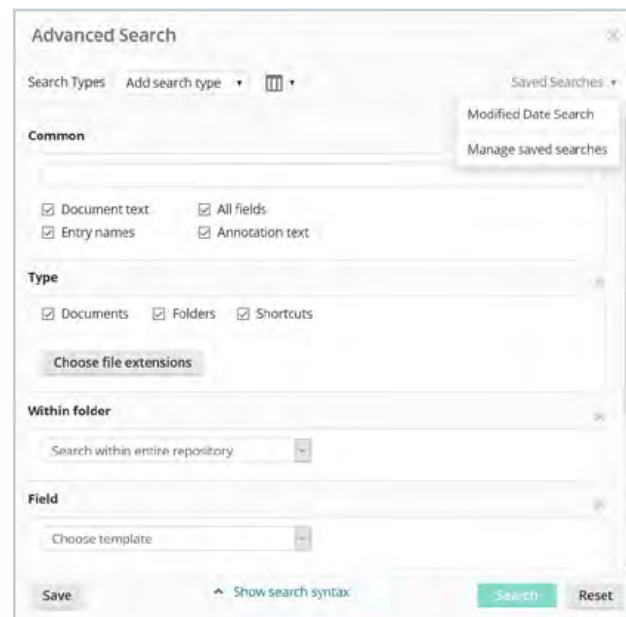
Saving a search in the Windows client

To run a saved search in the Windows client, open the search tab and click on Load. Then select the saved search.



Loading a saved search in the Windows client

In the web client, click on the Advanced search button at the top of the browser window. Then select Saved Searches.



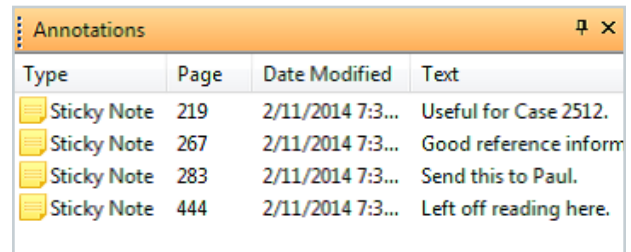
Loading a saved search in the web client

Note that any saved searches created with the Windows client will not be available in the web client, and vice versa. If you want to use the same saved search in both clients, you will have to create it in each client separately.

Bookmark Pages in a Document

When working within large documents, it can be useful to leave a bookmark so that you remember where you found a particular piece of information, or so that you know where you left off working. In Laserfiche, you can use annotations and the Annotations pane as a bookmark list.

For example, you might add a sticky note to signal where you stopped reading so that you begin there the next day. You can then display the Annotations pane and jump immediately to the location that you need by double-clicking on the annotation. You can even display the sticky note text in the pane to distinguish one bookmark from another. If you do not want to display your bookmarks to other users, you can make them private.



The screenshot shows a window titled 'Annotations' with a close button. It contains a table with four rows of sticky notes. Each row has a yellow sticky note icon, the text 'Sticky Note', a page number, a date and time, and the note's content.

Type	Page	Date Modified	Text
Sticky Note	219	2/11/2014 7:3...	Useful for Case 2512.
Sticky Note	267	2/11/2014 7:3...	Good reference inform
Sticky Note	283	2/11/2014 7:3...	Send this to Paul.
Sticky Note	444	2/11/2014 7:3...	Left off reading here.

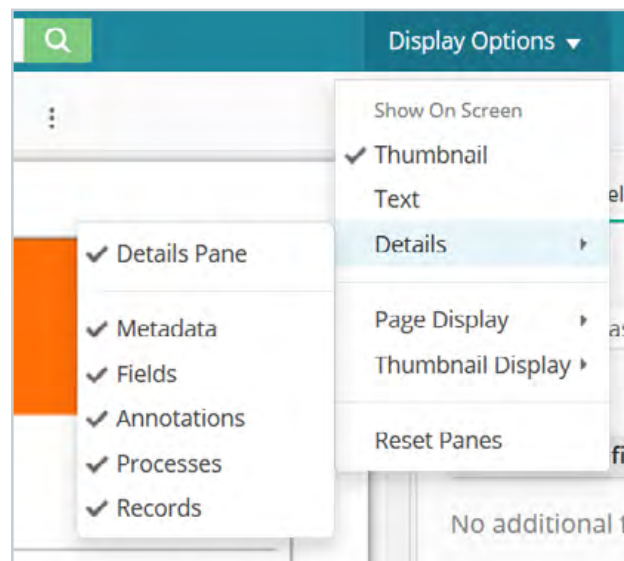
Annotations used as bookmarks in the Windows client

Customize the Document Viewer

You can rearrange the panes in the Laserfiche Windows client Document Viewer, allowing you to close panes that you do not want to use, open panes that you do, and drag and drop panes to different locations. You can also stack panes on top of one another so that they are accessible via tabs, or pin/unpin panes so that they open when you need them and slide out of sight when you do not. In addition, once you have set the panes in the configuration you want, you can lock the pane display to avoid accidentally moving a pane.

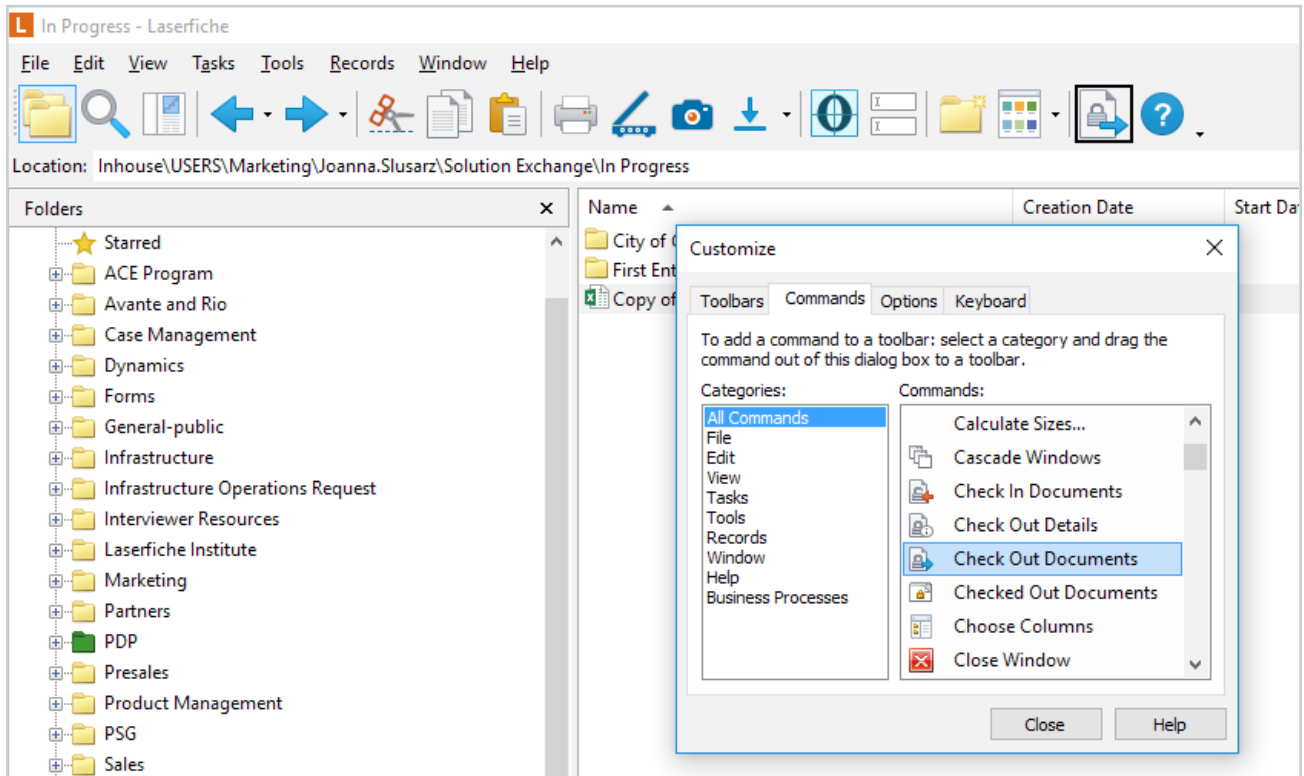
If you do accidentally move a pane, or rearrange your panes and later decide that you are not happy with them, you can quickly reset your pane layout to the default by closing all of the open panes. Once the last pane has been closed, the Document Viewer will give you the option to return to the default.

To modify the configuration of Document Viewer panes in the web client, click on Display Options. From there, you can select which panes to view and how the imaged document and thumbnails should be arranged.



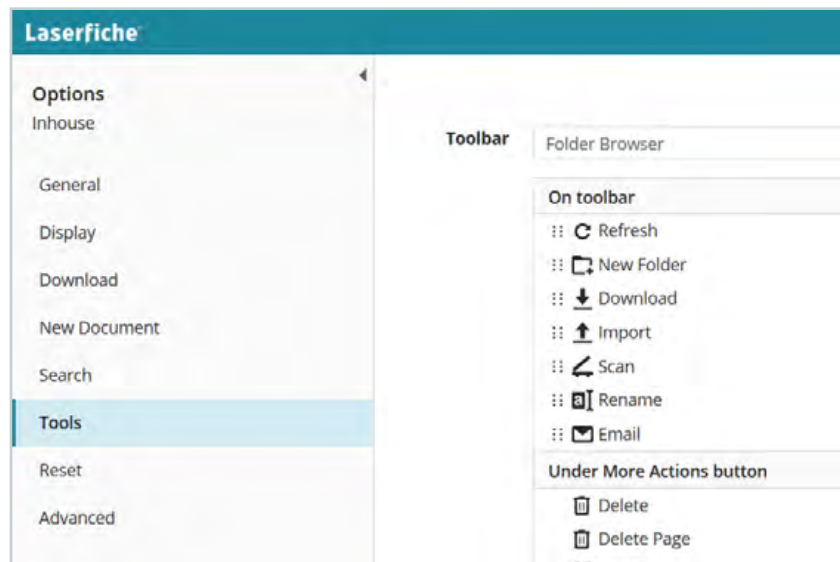
The Display Options menu in the web client Document Viewer

You can customize your Laserfiche Windows client toolbar by adding or removing buttons. For example, if you check out electronic documents frequently you can add the Check Out document button to your toolbar. Simply right-click the toolbar and click Customize. Select the buttons you want to add and drop them onto the toolbar.

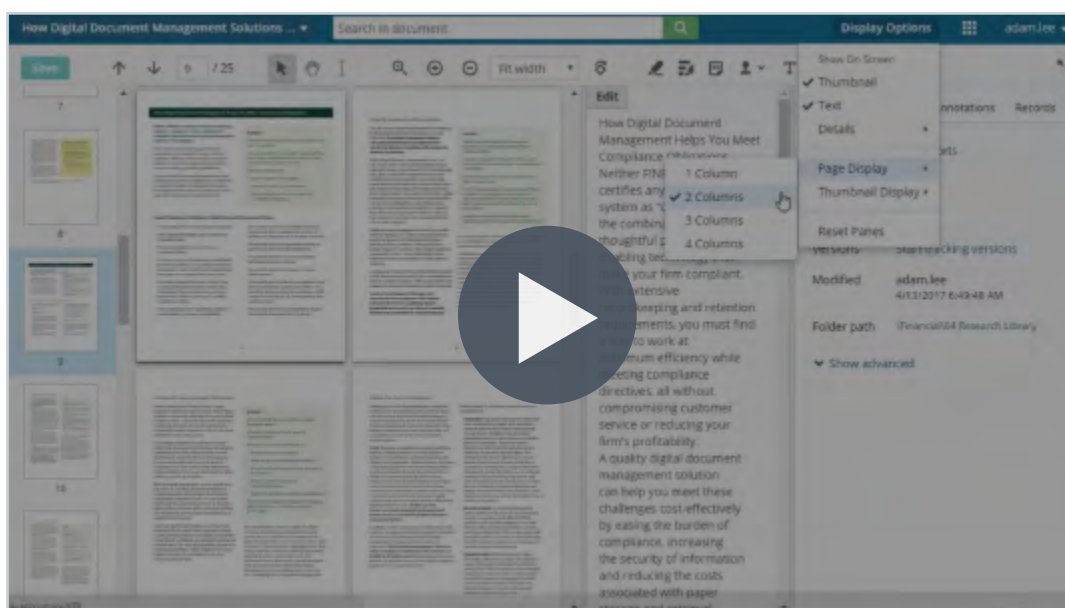


Customizing the toolbar in the Windows client

To customize the web client toolbar, navigate to the Tools section in the Options menu (found when clicking on your user name in the upper right corner of the Folder Browser). Drag the options you want to display to the “On toolbar” list and drag the options you do not want to display to the “Under More Actions” button list.



Customizing the toolbar in the web client



Video: Configure the Document Viewer

Zoom In On a Portion of the Document

When working in an imaged document in the Windows client, you can quickly select sections of a document. Simply click on the document's page and drag the cursor to create a lasso encompassing the part of the image you want to select. By default, as soon as you release the mouse button the Document Viewer will zoom in on the selected portion of the image. If you want to select a section of the image without zooming, you can hold down CTRL as you select.

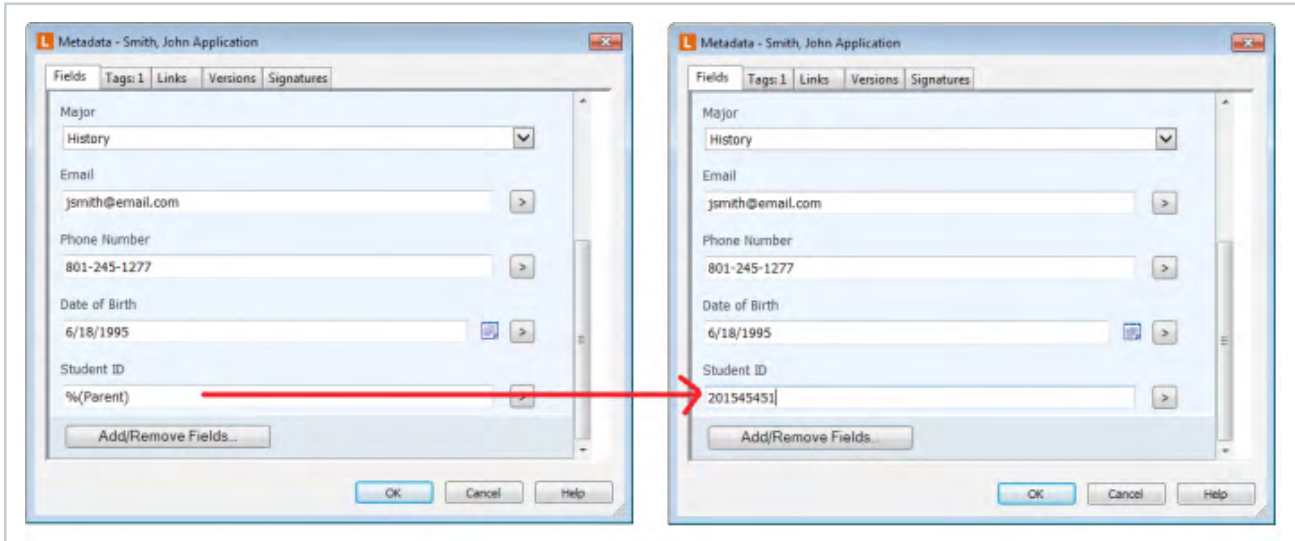
In the web client, you can click the magnifying glass icon in the document's tool bar and then click a portion of the document to zoom in on that particular section.

Simplify Metadata Entry

In order to simplify the process of manually filling out metadata, you can add the **%(Parent)** token inside a field to automatically pull information from the parent folder's template.

Example: Once a graduate or undergraduate application is reviewed, it is moved to the Student Records folder where a subfolder is created for each applicant. A Student ID is then automatically generated and inserted in the folder's template Student ID field. In order to simplify populating the Student ID in the application document's template, you can set the default value of this field to the **%(Parent)** token.

This way, the next time you view the document's metadata, it will be filled with the Student ID pulled from the folder's template.



Using the field data inheritance token in the Windows client

In the Windows client, you can also select a portion of your image using the text lasso, (see [Zoom In On a Portion of the Document](#) section) and drag and drop that selection into the fields of a document. (You will need to make sure that you are selecting the image without zooming, either by holding down CTRL or by changing the default behavior in Options.) This will copy the text from the selected portion of the image into the field.

For instance, if your document contains a customer name, and you need to fill out a customer name field, you do not need to retype the field value. Instead, you can select the portion of the document that contains the customer name, then drag and drop it into the Customer Name field. This allows you to take advantage of existing text, rather than having to re-input it by hand.

The web client has a separate select text button in the toolbar. This allows you to select a portion of the document's text, automatically copying it to your computer's clipboard. Simply paste the text in the appropriate field.



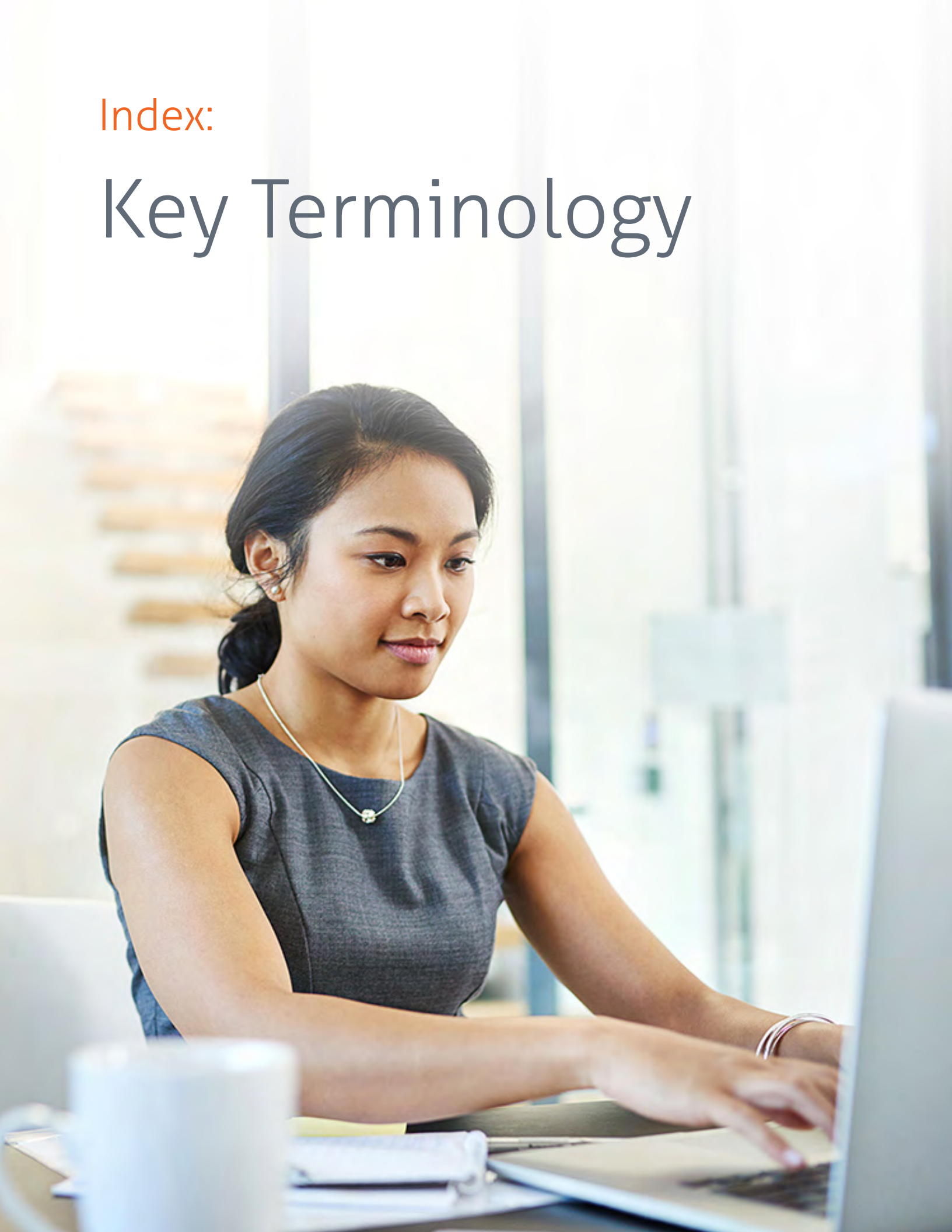
The select text button in the web client Document Viewer

Dragging and dropping, or selecting text from the image only works if there is text associated with the image. If the document has not been OCR'd, you will not be able to use this feature.

Learn More: [Tips and Tricks White Paper](#)*

Index:

Key Terminology



Annotation

An annotation is additional information applied to a specific page of a document, such as a highlight, a sticky note, or a redaction, that does not alter the underlying information in the document.

Check Out/In

Checking out a document is a way of indicating that you are currently working on that document. When a document is checked out, other users can open the document and view its contents, but they will not be able to make or save changes to the document.

Digital Signature

A digital signature is a way of indicating that a document is authentic, has been signed by a particular person, and has not been modified since the signature was applied. Digital signatures will only be available in your repository if your Laserfiche Server is licensed for them.

Document Viewer

The Document Viewer displays images, text, metadata (fields, tags, links, versions and digital signatures), annotations and thumbnails.

Electronic Document

An electronic document is a Laserfiche document associated with an electronic file. An electronic file is any non-image file that was created in an application other than Laserfiche. Electronic documents are usually viewed and modified using an external application.

Entry

An entry is a generic term for a document or folder.

Entry ID

The unique identifying number associated with an entry in Laserfiche.

Field

A field stores supplemental information on a document or folder.

Fields provide a quick overview of the content or important identifying characteristics of a document or folder, and increase the entry's searchability.

Folder Pane

The Folder Pane facilitates navigation and provides a clear, hierarchical representation of how your folders have been organized.

Imaged Document

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

Link

A link is a connection between multiple documents that allows you to keep track of related items.

Metadata

Metadata is a general term used to refer to information associated with a document in Laserfiche. Metadata consists of template and field data, tags, links, version information and digital signatures.

OCR

OCR stands for Optical Character Recognition, which is the process of extracting text from an image containing text.

Repository

A repository allows information to be organized and accessible from a central location. Your repository contains your documents, the folder structure in which they are contained, and additional information such as metadata, annotations, and security.

Tag

A tag is a label applied to a document.

Template

A template is a collection of fields, which can be used to categorize a document for search and retrieval and to quickly apply those fields to the document.

Thumbnail

A thumbnail is a miniature image of a document's page.

TIFF

TIFF is the default file format for saving imaged documents in Laserfiche.

Token

A token is a placeholder for a value to be inserted. Tokens can be used when populating fields in metadata, or in creating annotations such as dynamic stamps.

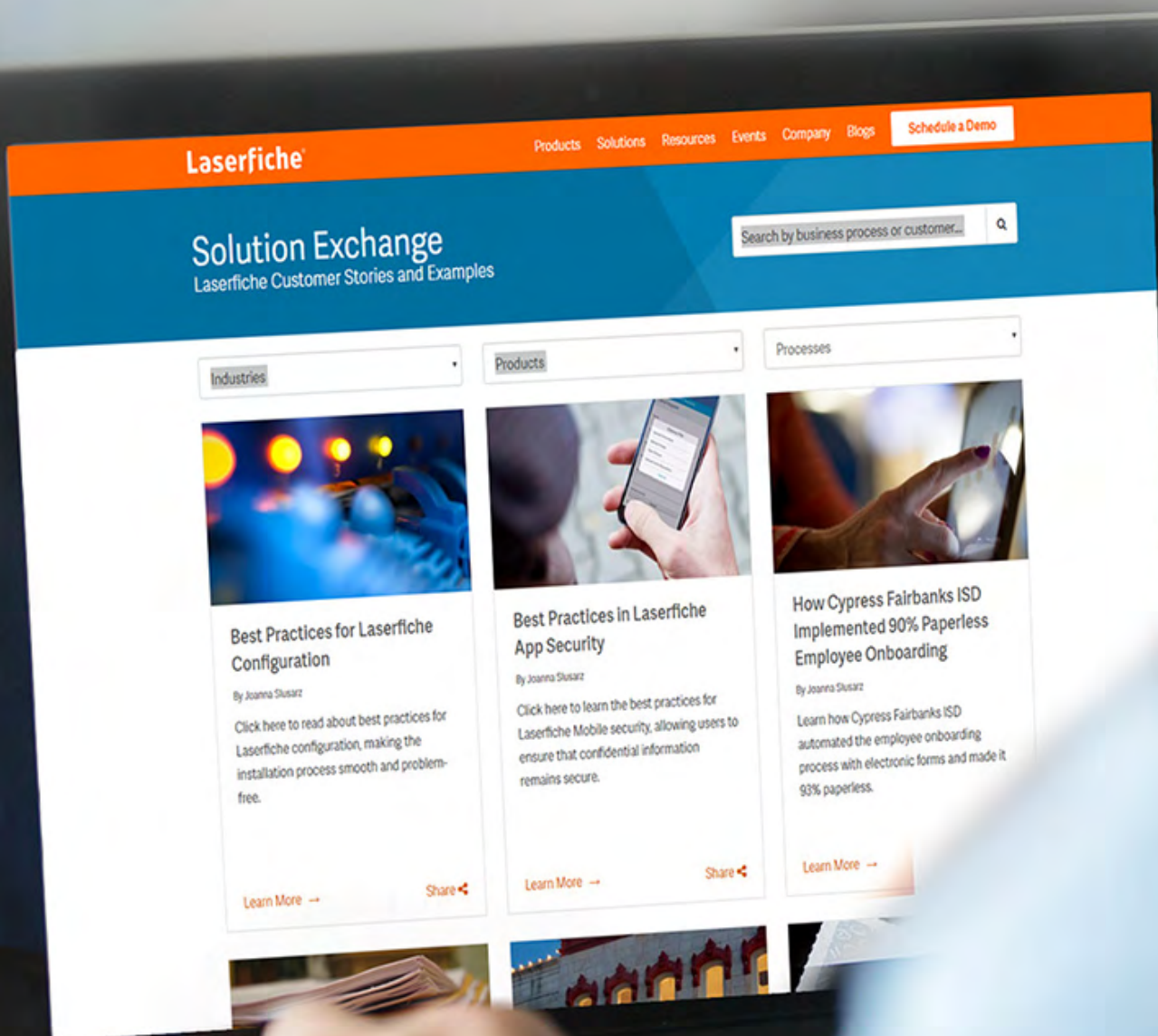
Version

Documents in the repository can be placed under version control. When a document is under version control, changes to that document will be saved as new versions within the document. You can then view the changes to a document, keep track of edits, compare versions, or revert to another version.

Index

Additional Resources

Laserfiche provides numerous resources, both digital and in person, to help you get the most out of your Laserfiche system.



Resources marked with an asterisk (*) require a free Laserfiche Account to access. You can create the free account [here](#).

- The [Laserfiche Online User Guide and Help Files](#) (*) contains a comprehensive overview of all Laserfiche functionality.
- The [Laserfiche Video Tutorial gallery](#) (*) includes various instructional videos on many Laserfiche topics.
- The [Laserfiche Solution Exchange](#) comprises a number of real-world customer use-cases of Laserfiche, including screenshots of implementations.
- [Laserfiche Answers](#) (*) is a question and answer forum where Laserfiche users, resellers and developers interact. You can search to see if someone has already answered a question that you have, and if not, ask it to receive answers from the community. Join [Laserfiche Answers groups](#) (*) based on industry or common interest to share ideas with like-minded individuals.
- The [Laserfiche Online Training and Certification Program \(CPP\)](#) contains a number of comprehensive online training courses to help you get certified in various aspects of Laserfiche software.
- The [Laserfiche Support Site](#) (*) provides white papers, videos and presentations on various topics to provide an in-depth look at different Laserfiche functionality. You can use the comprehensive search functionality or filter by product.

- The annual Laserfiche [Empower Conference](#) allows you to choose from more than 250 sessions and hands-on labs taught by industry experts, Laserfiche engineers, and customers on all topics related to Laserfiche. You can also test drive the newest features of the Laserfiche product line.
- [Regional User Groups](#) are held all around the world and help users network, exchange tips and tricks, and learn about new features.
- [Regional Training](#), which includes certified Laserfiche training classes, is held around the world. Learn how to take full advantage of your Laserfiche system, and use new products and features.



Join the Laserfiche Community

Laserfiche Answers is a community-driven web forum where Laserfiche users from all around the world share their knowledge and expertise.



Join Laserfiche Answers