

Tips and Tricks in the Desktop Laserfiche Client

White Paper

February 2014

Laserfiche®

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Introduction

The Laserfiche Client provides many features and options that can make it easier for you to work with information in your repository. This paper provides a quick overview of tips and tricks for working in the desktop Laserfiche Client.

Many of the tips and tricks in this document involve configuring options and settings in Laserfiche. Options and settings are configured on a per-user basis. This means that if you modify your own settings, you will not affect the settings of anyone else at your company. In addition, even if you access Laserfiche from several different computers, your options will be in effect from every computer you use.

For more information on any of these features, see the [Laserfiche User Guide](#).

Client Shortcut

The Laserfiche Client shortcut on the desktop or in the Windows Start menu is the way most people will launch the Laserfiche Client. You can customize the Laserfiche Client shortcut to make it more useful and powerful.

Customizing a Client Shortcut

The Laserfiche Client shortcut, whether accessed from the desktop or the Start menu, launches the desktop Client. You can customize the default shortcut, allowing you to automatically select a repository and log in using your Windows credentials, without having to select your repository from the list. You can also customize the shortcut to open to a particular document or folder, or to run a particular search upon launch. For example, you might choose to always log in to the repository “CompanyRepository” using your own Windows credentials, and to open to your personal folder. Alternately, if you start your day’s work by running a search for documents that are assigned to you and pending approval, you could customize the shortcut to perform that search as soon as the Client opens.

For complete instructions, see [Laserfiche Client Shortcut Options](#) in the Laserfiche User Guide.

Note: Because the Laserfiche Client shortcut exists outside Laserfiche, any configurations you make to it will only take effect on a single computer. If you work using the Laserfiche Client on three different computers, you will need to configure the shortcut on all three.

Pinning a Customized Shortcut to the Taskbar

Windows 7 and later allows you to pin frequently-used programs to the Windows taskbar. While it is not possible to directly modify the shortcut for a program pinned to the taskbar, you can still use the Laserfiche Client shortcut customizations with the taskbar. For instructions, see [Laserfiche Client Shortcut Options](#) in the Laserfiche User Guide.

Administrator’s Tip: You can use Windows group policy to push shortcuts out to multiple users on your domain. See [Configuring a Shortcut Item](#) on Microsoft TechNet for more information.

Columns and Column Profiles

Laserfiche allows you to customize the information that you see when browsing the repository. In the Laserfiche Client’s [Folder Browser](#), just like in Windows Explorer, information about an entry (a document, folder, or shortcut) is displayed in the columns. For instance, the example below shows the default set of columns displayed in a new repository.

Name	Pages	Indexed	Creation Date	Last Modified	Volume	Template Name
Pending Approval		Yes	12/11/2013 8:49:30 AM	2/11/2014 7:06:49 PM	DEFAULT	General
Clean4U Custodial Services	2	Yes	12/9/2013 2:22:51 PM	2/11/2014 7:08:51 PM	DEFAULT000000	Contracts
Clean4U Custodial Services -...	4	Yes	12/18/2013 12:36:53 PM	2/11/2014 7:06:38 PM	DEFAULT000000	Contracts
CSI Databank, Inc.	1	Yes	12/9/2013 2:22:24 PM	2/11/2014 7:07:33 PM	DEFAULT000000	Contracts
National Bank of La-La Land	1	Yes	12/9/2013 2:23:48 PM	2/11/2014 7:07:50 PM	DEFAULT000000	Contracts
PayFlex Accounting Systems	5	Yes	12/9/2013 2:21:10 PM	2/11/2014 7:08:20 PM	DEFAULT000000	Contracts

You can customize the columns in your repository to display exactly the information you want.

Customizing Columns

A wide variety of information about documents can be displayed in the Folder Browser. By default, the Laserfiche Client displays basic information about the document, including its number of pages, indexing status, creation date, last modified date, volume, and template. However, you may want to display different information instead. For example, you might want to display relevant fields or information about whether a document is under version control. You might also want to hide information you don’t need. You can do so by configuring the columns that are displayed in the [Contents Pane](#) of the Folder Browser.

Name	Client Name	Contract Expir...	Email	Version C...	Creation Date	Last Modified
Pending Approval				No	12/11/2013 8:49:30 AM	2/11/2014 7:06:49
Clean4U Custodial Services	Clean4U Custod...	6/1/2014	clean4u...	Yes	12/9/2013 2:22:51 PM	2/11/2014 7:08:51
Clean4U Custodial Servic...	Clean4U Custod...		clean4u...	No	12/18/2013 12:36:53 PM	2/11/2014 7:06:38
CSI Databank, Inc.	CSI Databank, Inc.	3/1/2015	CSIDatab...	Yes	12/9/2013 2:22:24 PM	2/11/2014 7:07:33
National Bank of La-La La...	National Bank o...	3/1/2014	lala@exa...	Yes	12/9/2013 2:23:48 PM	2/11/2014 7:07:50
PayFlex Accounting Syste...	PayFlex Accoun...	5/1/2014	payflex@...	Yes	12/9/2013 2:21:10 PM	2/11/2014 7:08:20

For more information, including complete instructions, see [Assigning Columns](#) in the Laserfiche User Guide.

Global vs. Specific Columns

By default, when you configure columns in the Folder Browser, those columns will be displayed for all folders in the repository. However, you can choose to save each folder's columns individually, so that modifying the columns in one folder will not affect any other folders. This is done in the Options menu, in the Browser: General section, where you can choose **Applied to all folders** or **Remembered for each individual folder** for column display. This is useful if you need to see one set of information in one folder but a different set of information in another folder. For example, you might want to see fields from the "Human Resources" template while in the "Employees" folder, but fields from the "Invoices" template when in the "Sales" folder.

Note: The columns shown when displaying search results are always distinct from the columns shown in the rest of the repository, regardless of the options you choose.

For more information, see [Assigning Columns](#) and [Options: Browser: General](#) in the Laserfiche User Guide.

Saving Column Layouts as Column Profiles

In some cases, you may frequently want to apply the same sets of columns, or you may want to quickly switch between multiple column layouts. A column profile saves a column layout so that it can easily be applied later.

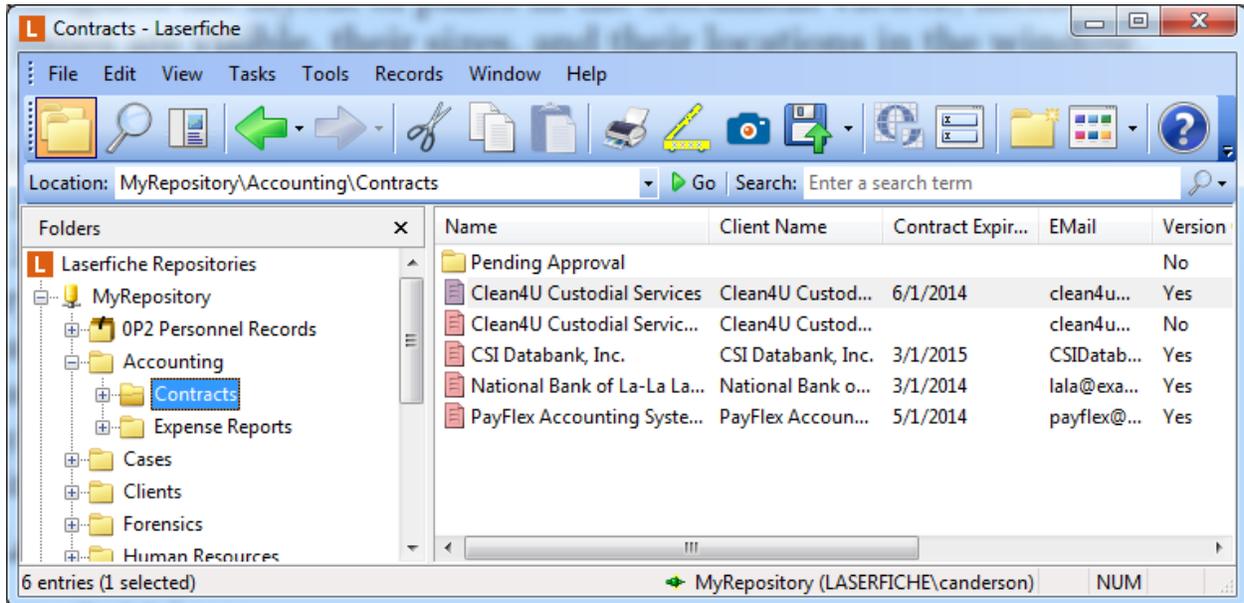
For instance, a Human Resources manager might be responsible for both reviewing applications and for ensuring that all the documents in the "Applicants" folders are correctly OCR'd and indexed. That user might want to display information from the "Human Resources" template when reviewing applications, but might instead need to display the Pages, Indexed, OCR'd Pages, and Extension information when checking the documents for searchable text. The manager could use column profiles to quickly switch between these two sets of columns, rather than changing them manually each time.

For complete instructions on creating and using column profiles, see [Column Profiles](#) in the Laserfiche User Guide.

Administrator's Tip: You can use trustee attributes to create a new default set of columns for new users, or to make a column profile available to the Everyone group, so that everyone who uses the repository has access to it. While users won't be forced to use the columns in any particular folders, they will be able to select them from the list of saved column profiles. This is an easy way to set up new defaults and allow users to quickly and easily choose useful sets of columns. See the [Trustee Attributes](#) paper for more information.

Folder Browser Tips

The [Folder Browser](#) is the part of the Laserfiche Client that allows you to navigate your repository, view your repository's folder structure, and find the documents you need. It is the main workspace through which you can administer and find your organization's information. Laserfiche provides many ways to use the Folder Browser to allow you to locate and work with your documents quickly and easily.



Document Preview Pane

The Preview Pane allows you to view documents and document information without actually opening the document. This is useful if you are looking for a document that you will know on sight, or if you simply need to refer to a page in the document without making changes. The Preview Pane is read-only, and allows you to view the document's pages, text, metadata, thumbnails, business process information, and annotations. If the document is a PDF, you can also view the PDF electronic file.

For more information on the Preview Pane, including instructions for opening it, see [Preview Pane](#) in the Laserfiche User Guide.

Copying a Folder Structure

Many repositories feature sets of folders that are repeated in different places. For instance, you might have a set of folders for each employee, with one folder for the initial resume and application, one for tax information, one for yearly reviews, and one for insurance paperwork. You can use Workflow or Quick Fields to automate creation of these repeated folder structures, but you can also easily copy them in the Laserfiche Client using the **Paste Folders Only** command. This command allows you to copy a set of folders and then paste them; the documents contained within the folders will not be copied, but all folders will.

For more information, including complete instructions, see [Copying Documents, Folders, and Shortcuts](#) in the Laserfiche User Guide.

Setting the Parent Folder's Template as the Default New Document Template

Since folders collect documents that are related in some way, it's often the case that most or all of the documents in a particular folder will have the same template. If this is the case, you can assign that template to the folder, and then configure Laserfiche to automatically assign documents the same template as their parent folder. This is done in the Options menu, in the New Documents: General section, by selecting **<Use parent folder's template>** as the default template for new documents. You can still manually change the template if a document is an exception. This allows you to take advantage of your folder structure to give documents the appropriate template.

Note: This setting only applies to newly-created documents. If you create a document and then move it into a folder with a particular template, the document's template will not be changed. In addition, if you change the template on a parent folder, the documents within that folder will not be modified. A workflow could be used instead if you want to keep information dynamically updated.

For information on assigning templates to folders, see [Assigning a Template](#). For information on assigning a default template to new documents, see [Options: New Documents: General](#).

Administrator's Tip: You can use trustee attributes to set **<Use parent folder's template>** as the default template for all new documents. See the [Trustee Attributes](#) paper for more information.

Using the Field Data Inheritance Token

If you have configured a template and fields on a folder, you can use those field values to automatically populate the fields of documents and folders within the folder using a token. For example, you might have a folder containing documents pertaining to a particular customer, with a template on each document to store the customer's name, phone number, address, and other information. You could set the customer information on the template of the parent folder, and then use the Parent Field token, **%(Parent)**, when creating the document to automatically copy the customer information from the folder's fields to the document's fields. (If the parent folder does not have the field, or the field is blank on the parent folder, the field will be blank on the document as well.)

Note: If a field is set using the Parent Field token, and later the parent folder's field changes, the document will not be updated. For example, if a parent folder had "Department" field with a value of "Sales," and a user created a new document with **%(Parent)** in that field, the document's "Department" field would be created with the value "Sales." But if the person moved to the "Accounting" department and you

changed the value on the parent folder, it would not be automatically updated for all documents in that folder. A workflow could be used instead if you want to keep information dynamically updated.

For information on assigning templates to folders, see [Assigning a Template](#). For information on using tokens to set field information, see [Using Tokens with Fields](#). For information on types of tokens, see [Token Types](#).

Administrator’s Tip: You can set the Parent Field token as a default value for a field to automate this behavior so that users do not need to manually select the token. See [Setting a Default Field Value](#) for more information.

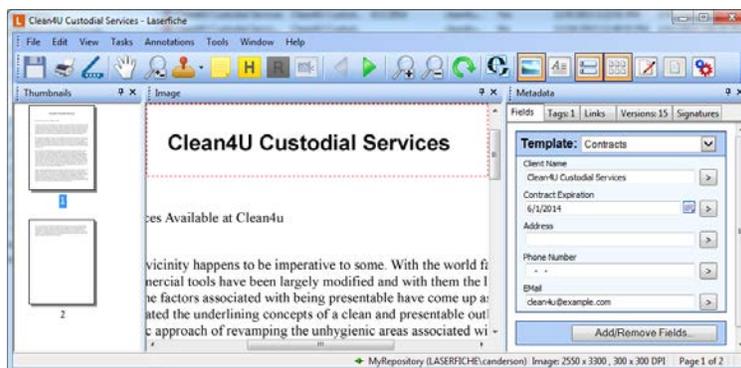
Document Viewer Tips

The Document Viewer is where you view the contents of a document in Laserfiche. It displays the document’s image pages, text, metadata, thumbnails, business process information, and annotations. The Document Viewer is the primary place that you will work with imaged documents and PDFs in Laserfiche, and there are a variety of tips and features that you can use to work with them more effectively.

Using the Text Lasso

When working in an [imaged document](#), 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.

If you want to select without zooming more often than you want to select and zoom, you can change Laserfiche’s default behavior. To do so, open the Options menu and select the View: General section, then clear **Zoom to selected region by default**. (You can select this option again if you want to return to the default behavior.)



For more information on selecting part of a document, see [Selection Mode](#). For more information on changing the behavior of selection mode, see [Options: View: General](#).

Dragging and Dropping Text

Once you have selected a portion of your image using the [text lasso](#), you can 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 don't 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.

Note: Dragging and dropping 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.

For more information on dragging and dropping text from an image, see [Copying Part of an Image](#) in the Laserfiche User Guide.

Using the Scroll Wheel to Move within a Document

When working in a document, you can use the scroll wheel on your mouse, trackball, or trackpad to help you navigate. When in any [cursor mode](#) other than zoom, the scroll wheel will scroll up and down a document's pages. If you want to zoom in, you can hold down CTRL while scrolling up, or switch to Zoom Mode and scroll. The Document Viewer will zoom in on the image, with the zoom centered on your cursor. You can zoom out by scrolling down.

For more information, see [Zoom Mode](#) in the Laserfiche User Guide.

Jumping to a Particular Page

When working in a large document, you may want to jump immediately to a particular page rather than having to scroll to that page. There are two ways to do so in the Document Viewer.

First, you can select a page in the Thumbnail Pane and begin typing the page number you want to go to. For instance, if you were on page one of a document and wanted to jump to page 49, you would click on page one in the thumbnail pane and then type 49. This will take you directly to that page. Alternately, you can use the **Go To Page** command to jump to a particular page.

For more information, see [Go To Page](#) in the Laserfiche User Guide.

Searching Within a Document

If you know a keyword from part of a document, but aren't sure where that keyword is, you can search within the document to find it. This allows you to search for words in document text for the open document and quickly find the page you need.

For more information, see [Within Document Search](#) in the Laserfiche User Guide.

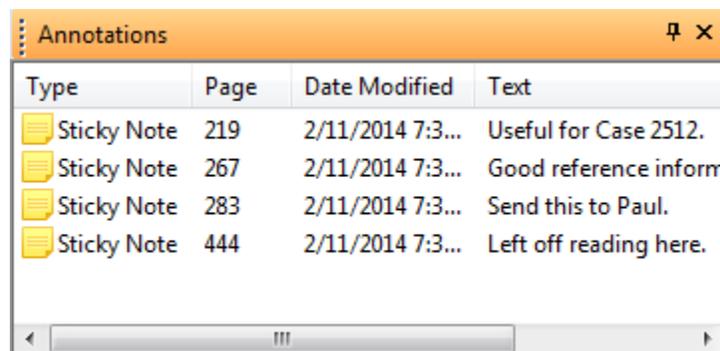
Using Private Annotations

In some cases, you may want to make annotations on a document that are only relevant or useful to yourself. For example, you may want to make notes that are just for personal reference, or you might circle or highlight information that's relevant to use but that may not be important for other users. If you want to make these personal annotations without cluttering the document for other users, you can do so using private annotations. When an annotation is marked as private, only you can see it. It will be completely invisible to other users.

For more information, on annotations, see [Annotations](#). For information on private annotations, see [Private and Protected Annotations](#).

Using the Annotation Pane as a Bookmark List

When working in 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 when working over more than one day. In Laserfiche, you can use annotations and the Annotation List Pane as a bookmark list. The Annotation List Pane lists all the annotations on a document, and allows you to jump directly to a particular annotation by double-clicking it. For example, you might leave a sticky note on pages with information pertaining to a particular client, or you might leave a note where you left off reading so that you can pick up the next day. You could then display the Annotation List Pane and jump immediately to the location that you need. 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](#).



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.

For more information, see [Annotations](#) and [Annotation List Pane](#) in the Laserfiche User Guide.

Rearranging the Document Viewer Panes

You can rearrange the panes in the Document Viewer in almost any configuration you want. You can 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 atop one another so that they are accessible via tabs, or unpin panes so that they open when you need them and slide out of sight when you don't. In addition, once you have panes the way you want them, 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 aren't 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. This makes it easy to correct mistakes if you accidentally rearrange the panes or decide that you are not happy with your pane layout.

For more information, see [Working with Panes in the Document Viewer](#) in the Laserfiche User Guide.

Administrator's Tip: You can use trustee attributes to set a different default pane configuration for new users. See the [Trustee Attributes](#) paper for more information.

Resetting Your Client Configuration

When working in Laserfiche and learning about options, you may find that you have configured things in a way that you don't like, or that you have accidentally chosen a setting that is causing problems. While you can always reset a setting in the Options dialog, it may be difficult to remember what you changed, or you may want to start fresh by clearing all of your custom settings. You can do so with the **Restore Default Settings** command.

Restore Default Settings will clear all of the configurations you performed in the Laserfiche Client and will return you to your repository's defaults. It will not delete your saved searches, custom quick searches, column profiles, custom toolbar buttons, optional watermarks, or favorite business processes, but it will remove all other settings that you configured. This is an easy way to return to a standard set of options.

For more information, see [Prompts and Settings](#) in the Laserfiche User Guide.

Administrator's Tip: You can manually clear out all of a user's settings and options in the Laserfiche Administration Console. This is useful for troubleshooting issues with a user's configuration. It will clear settings that are not included in the Restore Default Settings command, such as saved searches and column profiles. See the [Trustee Attributes](#) paper for more information.



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Description:

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