Quick Fields 10 Licensing Summary

White Paper

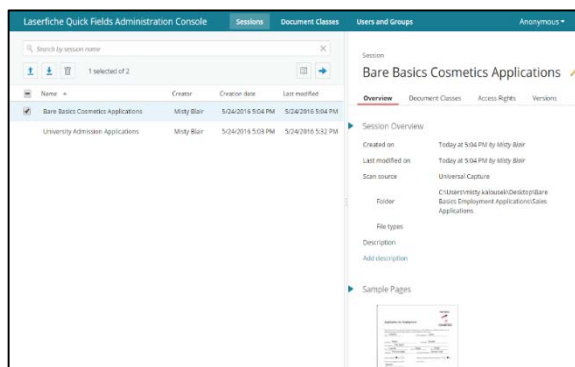**Laserfiche**®

Table of Contents
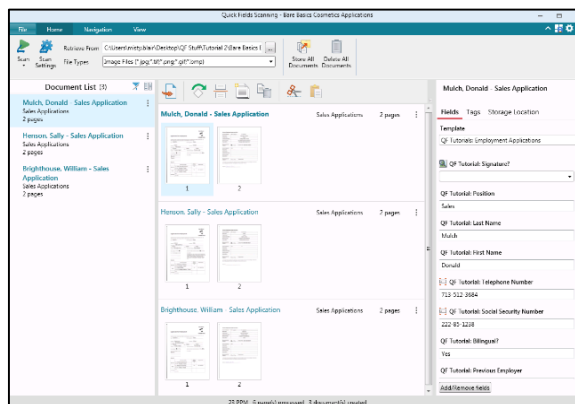
Laserfiche Quick Fields 10 Components

Laserfiche Quick Fields Server – New in Quick Fields 10

The new Quick Fields Server, which is accessed using the web-based Quick Fields Administration Console, is a centralized storage location that manages sessions and document classes. User- and group-based security settings can also be configured using the server. The sessions and document classes stored on the server are run by Quick Fields and Quick Fields Scanning on local machines.
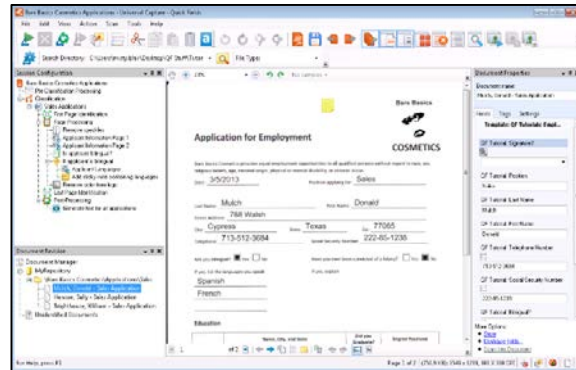
Laserfiche Quick Fields Scanning – New in Quick Fields 10

Quick Fields Scanning is a new, simple and intuitive desktop application designed specifically for scanner operators to scan and process documents. Quick Fields Scanning can only run sessions and document classes stored on the Quick Fields Server. Once documents are scanned, scanner operators can easily view and identify documents, reprocess documents, modify metadata, and store documents to Laserfiche.
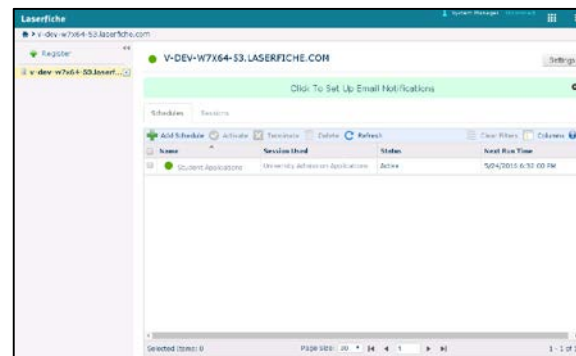
Laserfiche Quick Fields 10

Quick Fields is a desktop application used to build, scan, and store documents to Laserfiche. The ability to publish sessions and document classes to the Quick Fields Server has been added to the Quick Fields application, along with other bug fixes and enhancements.

Laserfiche Quick Fields Agent

Quick Fields Agent remains unchanged in Quick Fields 10. Its two key components include:

- The Quick Fields Agent Service, which runs unattended scanning sessions
- The Quick Fields Agent Web Administration Console, which schedules sessions and tracks processing results

Note: Quick Fields Agent shares no functionality overlap with new Quick Fields 10 components.

Laserfiche Quick Fields 10 License Summary Chart

	Laserfiche Rio	Laserfiche Avante	Note
Laserfiche Quick Fields Server	License included with Laserfiche Quick Fields purchase. No limit to number of Quick Fields Servers.	License included with Laserfiche Quick Fields purchase. Limited to one included license, but more can be purchased.	• Licensed and installed separately from Quick Fields and Quick Fields Scanning • No additional license cost • At least one Quick Fields workstation license required for Quick Fields Server • A separate activation key will need to be generated to install the Quick Fields Server
Laserfiche Quick Fields **Laserfiche Quick Fields Scanning**	Licensed per workstation	Licensed per workstation	• Both applications share the same license and installer • No additional license cost for Quick Fields Scanning • Choose to install one or both applications on the *same* machine • Retains all existing bundles/process restrictions • Quick Fields Scanning requires Quick Fields Server

Laserfiche Quick Fields Agent	Licensed per workstation	Licensed per workstation	- Installed on the same computer as Quick Fields - Does not interact with the Quick Fields Server - Retains same functionality as Quick Fields 9 without overlap with new Quick Fields applications

Laserfiche Quick Fields 10 Upgrade Scenarios

A university has multiple Quick Fields sessions that process registrar documents such as diploma requests, change of major/minor requests, course add/drop requests, etc. The university uses student scanner operators and Quick Fields Agent to run processes at non-peak hours. The current Quick Fields 9 setup is as follows:

- Laserfiche Rio
- 20 Quick Fields Complete Workstations, which include add-ons such as:
    - Annotations
    - Pattern Matching
    - Zone OCR
    - Optical Mark Recognition
    - Real-Time Lookup
    - Document Classification
- 1 Quick Fields Agent station

If the university chooses to upgrade to Quick Fields 10, there are several implementation options:

Scenario 1 – Use Quick Fields, Quick Fields Server, and Quick Fields Scanning

Quick Fields 10 remains as the application used to develop sessions, and it retains all existing features and purchased add-ons from the previous Quick Fields version. Using the same license and installer as Quick Fields 10, the university can also choose to install the new Quick Fields Scanning application with no additional license cost on all 20 machines—or on a limited number of machines.

While both applications can be installed on the same machine, the university can choose to install either one depending on the particular user's role. For users that design and test sessions, Quick Fields will be the primary application. For the student scanner operators, having access to the full capability of Quick Fields is not always necessary, so Quick Fields Scanning would be ideal to install at their stations.

The Quick Fields Server will also be installed for the university to take advantage of several benefits it provides. After installing and licensing the Quick Fields Server at no additional license cost (and with a separate installer), Quick Fields and Quick Fields Scanning can then be connected to the Quick Fields Server. The Quick Fields Server, which is necessary for Quick Fields Scanning, will provide a centralized location for different stations to conveniently access sessions that are published to the server using Quick Fields.

Sessions on the server are then run on the machines where Quick Fields and Quick Fields Scanning are installed. Administrators will also be able to easily move document classes between sessions as needed and set security privileges for users with the Quick Fields Server. Since this university uses Laserfiche Rio, it can also choose to deploy as many Quick Fields Servers as it needs for no additional cost. Quick Fields Agent will still be available to schedule processing as needed and remains unchanged.

Scenario 2 – Use Quick Fields and Quick Fields Server

In this case, the university chooses not to install Quick Fields Scanning, so as in the previous Quick Fields version, all users will use the same Quick Fields application to design, test, and scan documents depending on their role.

While sessions and document classes can still be stored and managed on each machine, the Quick Fields Server will enable users to centrally manage and share published sessions and document classes across all stations as needed.
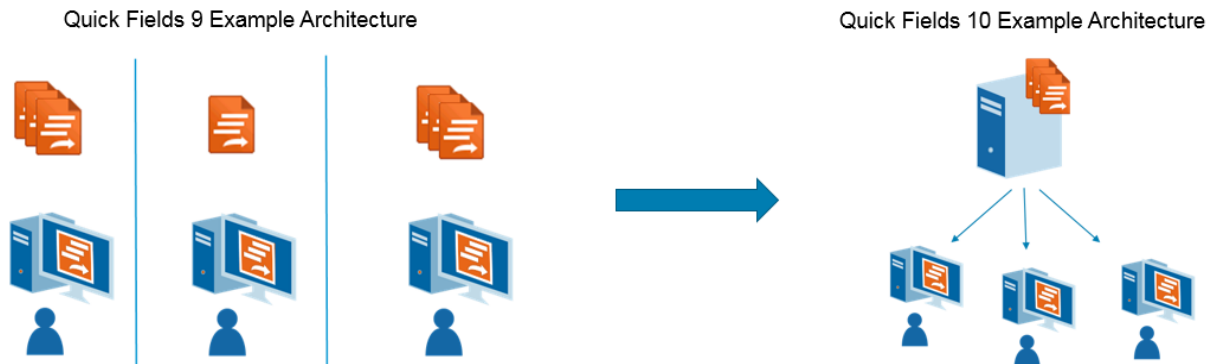
Scenario 3 – Quick Fields Only

This will function the same way as a Quick Fields 9 implementation. Users can continue to use the Quick Fields application and add-ons to design and test sessions as done previously.

Summary

Upgrading a Quick Fields 9 environment to a Quick Fields 10 environment can include the following:

- Laserfiche Rio
- 20 workstations, each with Quick Fields and/or Quick Fields Scanning, with add-ons such as:
  - Annotations
  - Pattern Matching
  - Zone OCR
  - Optical Mark Recognition
  - Real-Time Lookup
  - Document Classification
- At least 1 Quick Fields Server
- 1 Quick Fields Agent Station

Quick Fields 9 Example Architecture

Quick Fields 10 Example Architecture

In Quick Fields 9, sessions are stored locally on each workstation and individually need to be manually updated. In Quick Fields 10, sessions can be stored on the Quick Fields Server for multiple users to access, where any session updates can be immediately available to the relevant users.

Other Considerations

For a Laserfiche Avante platform, all the above applies with the limitation of one Quick Fields Server license. However, additional Quick Fields Servers can be purchased.

The existing Migration Utility is required to migrate sessions from Quick Fields 7 and earlier. For sessions created in Quick Fields 8 or 9, there is no migration required and sessions can be published to the Quick Fields Server as necessary using Quick Fields 10. To view the documentation on moving to Quick Fields 10 from earlier versions, click here.

Laserfiche Team and United systems do not support the Quick Fields Server or Quick Fields Scanning. Classic Laserfiche Quick Fields 9 can be upgraded to version 10 and will continue to run as previously established.

Upgrading to Quick Fields 10 does not require additional licensing fees. However, non-licensing costs may be incurred with changing the capture architecture, such as hardware or professional services.

A separate activation key will need to be generated to install the Quick Fields Server in addition to the Quick Fields 10 activation key.

For more information on Quick Fields 10, see the Quick Fields 10 help files.

Laserfiche®

Quick Fields 10 Licensing Summary
June 2016

Author: Brandon Buccowich
Editor: Misty Blair, Catherine Ramos
Technical Editor: Tessa Adair

Description:
This paper provides information on Quick Fields 10 licensing.