

# Laserfiche 8 Implementation Checklist

*White Paper*

August 2008

**Laserfiche®**

*The information contained in this document represents the current view of Compulink Management Center, Inc on the issues discussed as of the date of publication. Because Compulink must respond to changing market conditions, it should not be interpreted to be a commitment on the part of Compulink, and Compulink cannot guarantee the accuracy of any information presented after the date of publication.*

*This chapter is for informational purposes only. COMPULINK MAKES NO WARRANTIES, EXPRESS OR IMPLIED, AS TO THE INFORMATION IN THIS DOCUMENT.*

**Table of Contents**

Laserfiche 8 Implementation Checklist .....i

    Table of Contents .....2

    Before You Begin.....3

    Installation.....3

    Post-Installation.....4

    Post-Installation Checks.....5

This checklist provides a quick, chronological list of the important steps in a Laserfiche installation. For an expanded version of this list, with step-by-step instructions, please see the [Laserfiche 8 Implementation Guide](#).

## Before You Begin

The Server computer meets the recommended software/hardware requirements.	<input type="checkbox"/>
The Client computers meet the recommended software/hardware requirements.	<input type="checkbox"/>
The computers on which you will be installing the server and storing the database and volume files have adequate disk space.	<input type="checkbox"/>
The Windows domain user who the Server service will be logging in as has access to Microsoft SQL Server or Oracle and to the volume files.	<input type="checkbox"/>

## Installation

Install the Server from your installation CD or the installation download on the Support site.	<input type="checkbox"/>
If you are installing Scanning, install your scanner drivers and configure your scanner according to its manufacturer's instructions. If you will be using Kofax, you must install the ACE or VRS software before installing Laserfiche Scanning.	<input type="checkbox"/>
Install the Client on the Client workstations from your installation CD or the installation downloaded on the Support site. The Client installation also includes the Laserfiche Scanning and Snapshot installations. (Snapshot for x64 computers requires an additional installation.)	<input type="checkbox"/>

Install at least one Administrator instance of the Client on the computer or computers on which you want to use the Administration Console.	<input type="checkbox"/>
If you are licensed for Audit Trail, install Laserfiche Audit Trail Reporting from your installation CD.	<input type="checkbox"/>
If you are licensed for Snapshot, and will be using it on one or more x64 computers, launch the Snapshot x64 installation from your installation CD. (The Snapshot installation for other operating systems is part of the Client installation.)	<input type="checkbox"/>
If you will be migrating a repository from Laserfiche 6 or 7 to Laserfiche 8, install the Laserfiche Migration Guide from your installation CD.	<input type="checkbox"/>

## Post-Installation

Ensure that the Laserfiche Server can communicate with client applications over the relevant ports (5050 for the 32-bit edition of Windows XP, 80 for all other supported operating systems, and 5051 for all installations).	<input type="checkbox"/>
Register your Laserfiche Server in the Administration Console.	<input type="checkbox"/>
Create a Laserfiche Repository.	<input type="checkbox"/>
Configure basic Laserfiche security, such as adding Windows Accounts or creating users, and setting a password on the Admin user.	<input type="checkbox"/>

Enable or disable the Recycle Bin.

☐

## Post-Installation Checks

You should perform all post-installation checks on a Client workstation that is not on the server machine.

In the Administration Console, can you create a new user or add a Windows Account?

☐

In the Administration Console, can you create new fields and templates?

☐

In the Administration Console, can you create a new volume?

☐

In the Client, can you open your new repository?

☐

In the Client, can you import a document?

☐

In the Client, can you open a document, and view its image, text, thumbnails and fields?

☐

In the Client, can you OCR or extract text from a document?

☐

In the Client, can you perform a text search? Are the text highlights in the proper places?

☐

In Scanning, can you scan a new document and store it in the repository?

☐



Laserfiche 8 Implementation Checklist  
August 2008

Author: Constance Anderson

Compulink Management Center, Inc.  
Global Headquarters  
3545 Long Beach Blvd.  
Long Beach, CA 90807  
U.S.A

Phone: +1.562.988.1688  
[www.laserfiche.com](http://www.laserfiche.com)

Laserfiche is a trademark of Compulink Management Center, Inc.  
Various product and service names references herein may be  
trademarks of Compulink Management Center, Inc. All other products  
and service names mentioned may be trademarks of their respective owners.

Copyright © 2006 Compulink Management Center, Inc.  
All rights reserved