

Laserfiche Import Agent Quick Start Guide

White Paper

Laserfiche®

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Welcome to Import Agent

Import Agent is a tool for automatically retrieving files stored in a Windows folder and importing them into a Laserfiche repository. The Windows folder can be local to the Import Agent machine or stored on a network drive. During the import process, Import Agent can process the files (e.g., perform OCR), add metadata (e.g., populate fields, add tags), and perform additional tasks.

The Windows folder that files are retrieved from is referred to as the monitored folder. If a file is found in this folder, it will be imported into a repository. After a file is imported to Laserfiche, the source file can either be deleted or moved to another Windows folder. If a file cannot be imported into Laserfiche, it will be moved to an alternate Windows folder.

What's New in Import Agent 10?

Laserfiche Import Agent 10 is a major release that includes new features and enhancements.

- Import Agent now supports multiple threads on multi-core machines.
- Existing profiles can be copied, giving you a starting point when creating a new profile.
- When importing into an existing document, that document can now be put under version control.
- Schedule importing has been updated so that it only imports files during the configured time period. Previously, schedule importing would import any documents found during the configured time period even if the import process took longer than the time period.
- A new option lets you delete monitored subfolders if they are empty after import.
- Text generation has been improved so you can automatically generate text from electronic documents and OCR PDFs that do not have text streams.
- Import Agent has new email tokens for MSG files and file tokens for creation and modification date.
- Files imported from an XML list file can be post-processed, and PDF files imported from an XML list file follow the PDF import options.
- Import profiles are now saved as XML files (saved under Program Data) instead of as registry keys.

Getting Started

Import Agent runs as a Windows service named **Laserfiche Import Agent Service** to retrieve, import, move, and delete files from monitored folders. Follow these three steps to get Import Agent up and running.

1. [Create a profile](#). Profiles define the Windows folder from which files will be retrieved, the import schedule, what will happen to source files after an import is attempted, the metadata that should be assigned to imported files, and other settings.
2. Ensure the Windows account assigned to the Import Agent service has sufficient permissions to the Windows folder. [Learn more](#).
3. Ensure the Laserfiche Import Agent service is started. [Learn more](#).

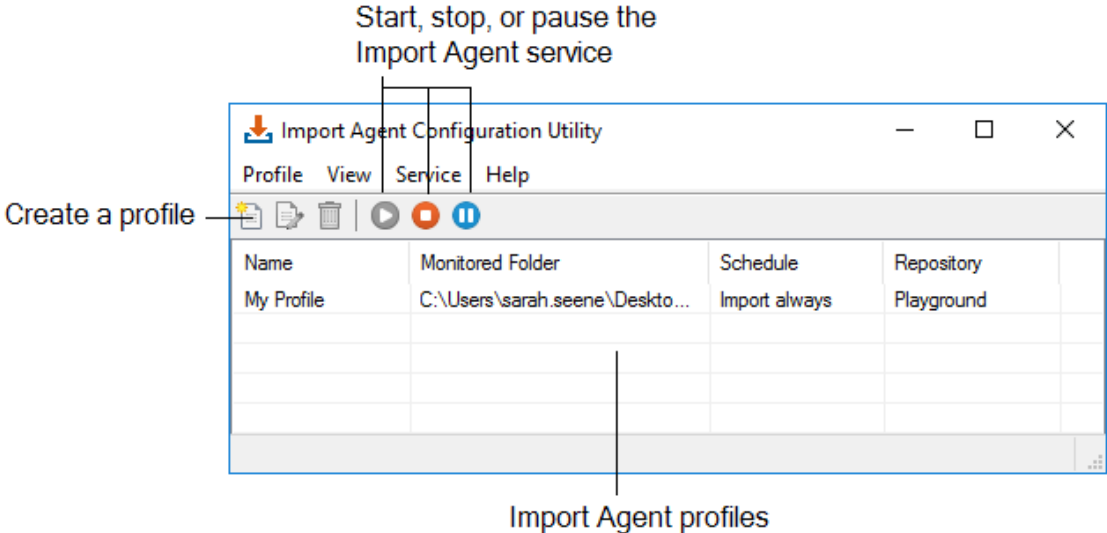
For more information, see the [Import Agent help file](#).

Import Agent Configuration Utility

Use the Import Agent Configuration Utility to create one or more Import Agent profiles. Each profile can monitor a different set of Windows folders.


To open the Configuration Utility

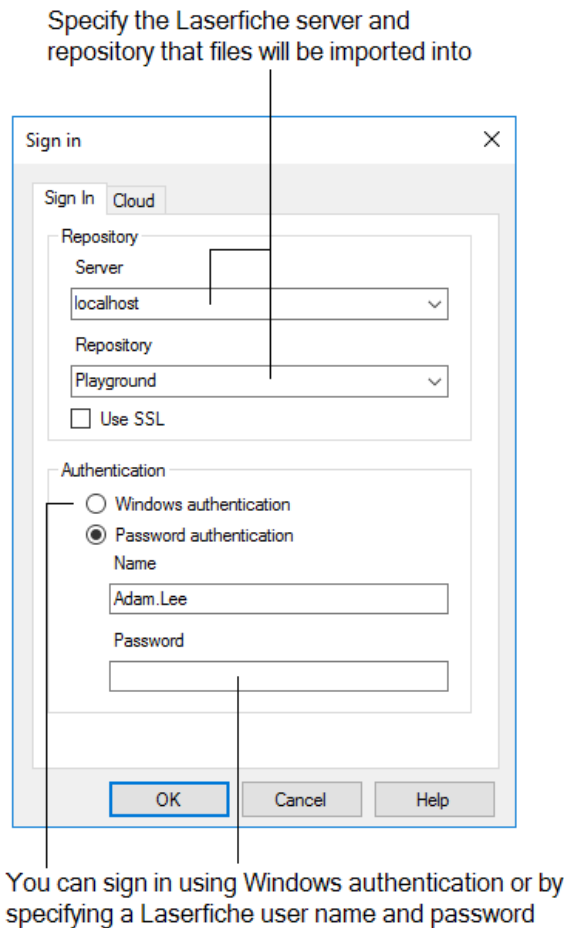
1. Go to the Windows **Start** menu.
2. Click **Laserfiche Import Agent Config** to open the **Import Agent Configuration Utility**.



Creating a Profile

Profiles define the Windows folder from which files will be retrieved, the import schedule, what will happen to source files after being imported, the metadata that will be assigned to imported files, and other settings. You must create at least one profile to use Import Agent.

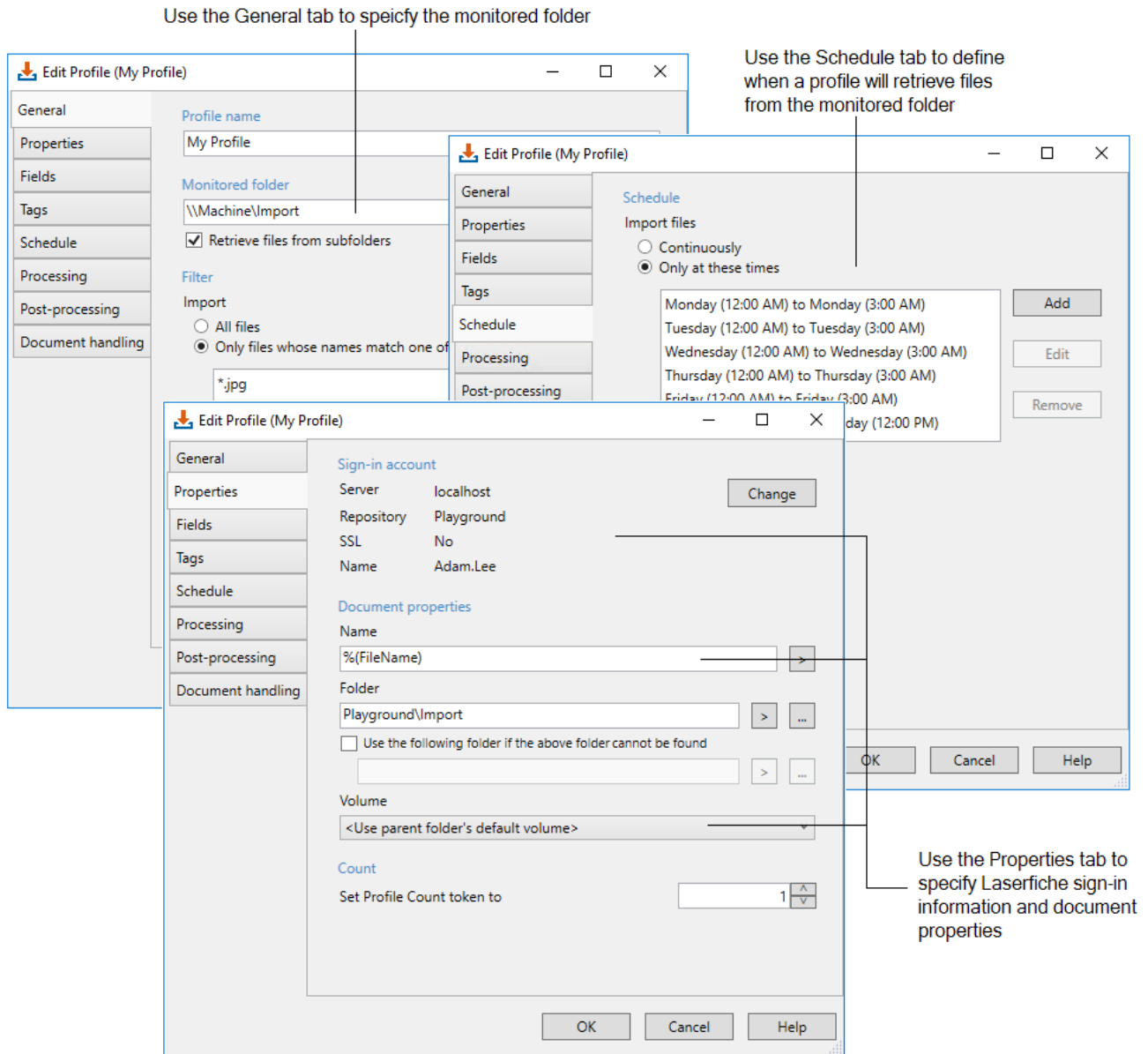
In the Import Agent Configuration Utility, click the **Create a profile**  toolbar button. Then sign in with the information Import Agent will use to connect to the Laserfiche repository it is importing into.



Note: If you select Windows authentication, the Windows account assigned to the Laserfiche Import Agent service will be used to sign into the repository.

Note: The user you specify must have sufficient [Laserfiche rights](#) to perform the actions in the profile. For example, the user must be able to sign into the repository and create files in the destination folder.

Proceed through each tab of the **Edit Profile** dialog box.



Import Agent Profile Tabs

General: Define the profile's name, the Window's folder from which files will be retrieved, and which types of files will be imported.

Properties: Define the sign-in account, the document properties (e.g., name, destination folders, volume), and a value for the Profile Count token

Fields: Specify the template and/or fields that will be assigned to imported documents, and populate assigned fields.

Tags: Specify the tags and tag comments that will be assigned to imported documents.

Schedule: Define when Import Agent will retrieve and import files. Scheduling a time interval lets you reduce network usage during peak hours. You can also disable the profile from this page.

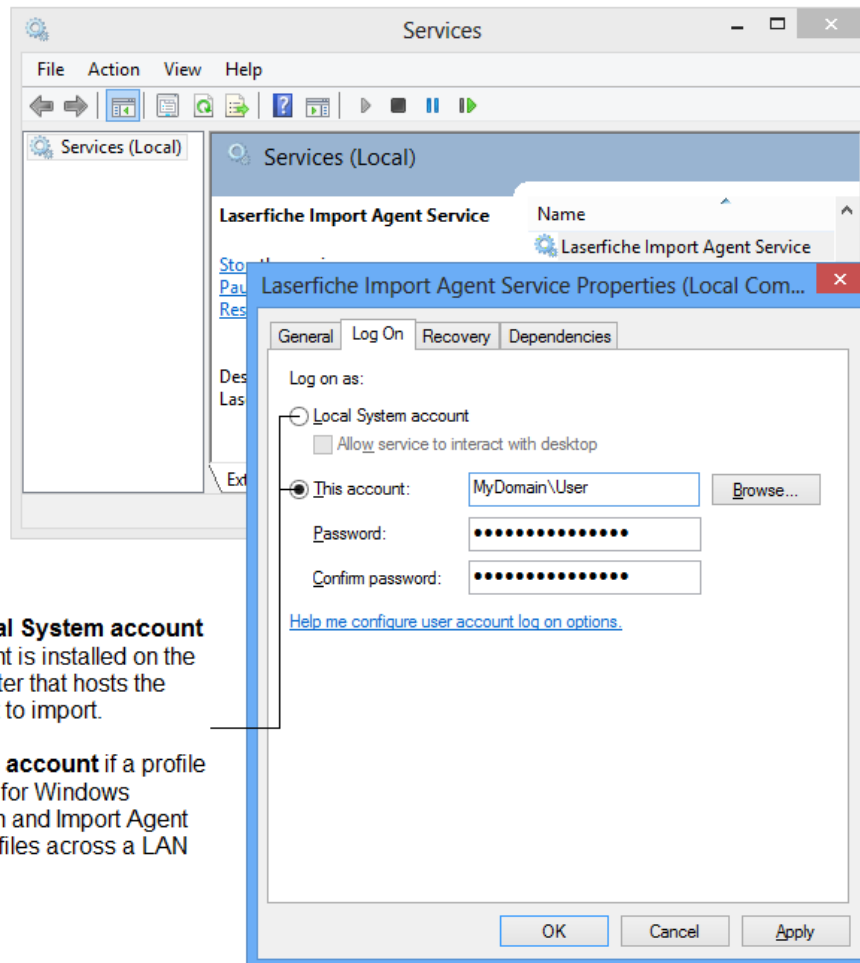
Processing: Specify whether text will be generated for imported files and how often to make new text pages. You can also configure the profile to generate Laserfiche image pages from PDF files.

Post-Processing: Specify what will happen to source files after they are imported or if the import fails.

Document Handling: Specify what will happen if the name of the document being imported matches the name of document already in the destination folder. Additionally, if you are importing into existing documents, you can put those documents under version control.

Configure Windows Rights for the Import Agent Service

Import Agent uses a Windows service named Laserfiche Import Agent to retrieve, import, move, and delete files in Windows folders. In some cases, you may need to modify the Windows account associated with this service.



Choose **Local System account** if Import Agent is installed on the same computer that hosts the files you want to import.

Choose **This account** if a profile is configured for Windows authentication and Import Agent must access files across a LAN or WAN.

Starting the Import Agent Service

The Laserfiche Import Agent service must be started for Import Agent to function.

Open the Import Agent Configuration Utility and use the Service menu option to start the service.



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This paper provides an overview of Laserfiche Import Agent.

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