URL Linking in Web Access and WebLink

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URL Linking

Web Access and WebLink is unique among Laserfiche products because it allows you to access and work with your documents from virtually any location with an Internet connection. One of the most useful ways to take advantage of this online format is through URL linking, which enables you to provide direct access for yourself and other users to folders, documents, search results, and other types of information stored in your repository without having to navigate to them.

This paper provides an overview of the URLs supported by Web Access and WebLink, as well as tips for how to modify these URLs to create your own custom links. We will also explore how your repository's security settings interact with URL linking to help you get the most out of sharing your links.

Web Access URLs

Entry URLs

Web Access entry URLs are used to link to documents, folders, and the information associated with these entries. Entry URLs can be divided into four basic categories—Folder Browser URLs, Document Viewer URLs, Electronic Document URLs, and Metadata URLs—each includes an assortment of URLs that can be used to access and share different types of information about an entry.

To copy the URL link to one or more entries

1. Right-click the entry and select **Copy Link**.
2. If you are viewing Web Access in Internet Explorer, the link will be copied directly to your clipboard. If you are viewing Web Access in Firefox or Chrome, the **Copy Link** dialog box will appear.
3. In the **Copy Link** dialog box, select the desired link and click **Copy Link**. If the **Copy Link** button does not appear, you can manually copy the link by pressing **CTRL + C**.

Folder Browser URLs

One type of entry URL is a Folder Browser URL, which determines what folders are displayed in the Folder Browser and the accompanying folder tree when you are navigating in Web Access. There are two types of Folder Browser URLs: one that specifies what folder is opened in the Folder Browser, and one that specifies what folder serves as the root of the folder tree. Web Access generates these URLs by default; however, you can also create your own custom Folder Browser URLs that include a particular folder.

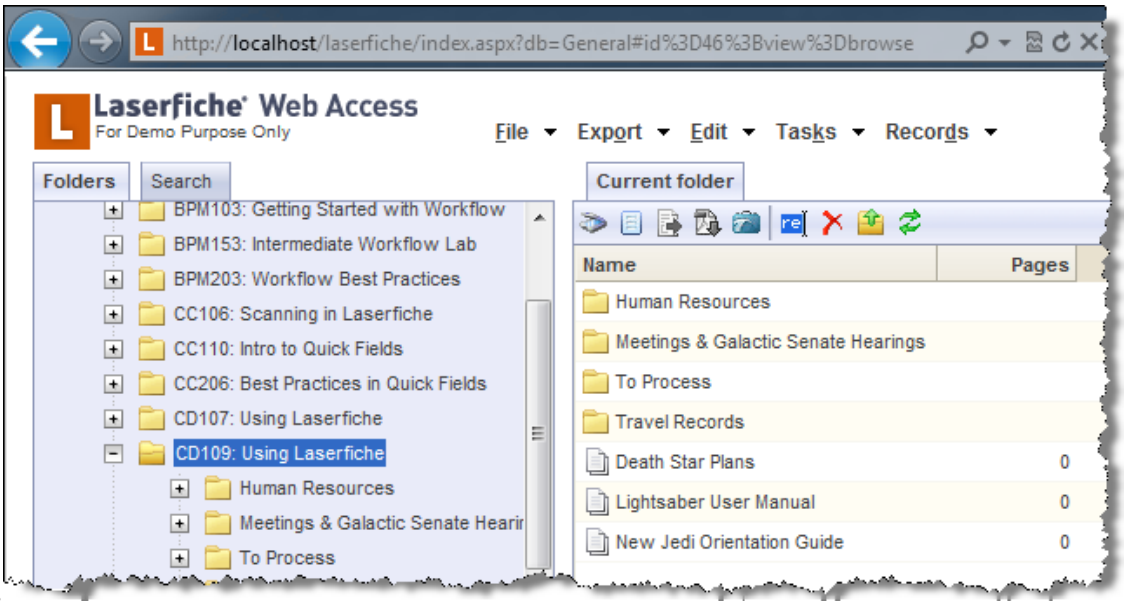
Display Folder in Folder Browser

When you navigate to a folder in your repository, Web Access generates a URL specific to that folder in the form

*http://**servername**/laserfiche/index.aspx?db=**repositoryname**#id=**id**;view=browser*

where **servername** is the name of the server where Web Access is installed, **repositoryname** is the name of your Laserfiche repository, and **id** is the folder's entry ID number. By copying this URL, you can send it (via e-mail, instant messenger, etc.) to other users, who will be directed to the Folder Browser with that specific folder in focus when they paste the link into an Internet browser, assuming they have necessary repository access and security rights. You can also create your own URLs that link to other folders by simply changing the entry ID listed in the URL syntax to specify the ID number of a different folder.

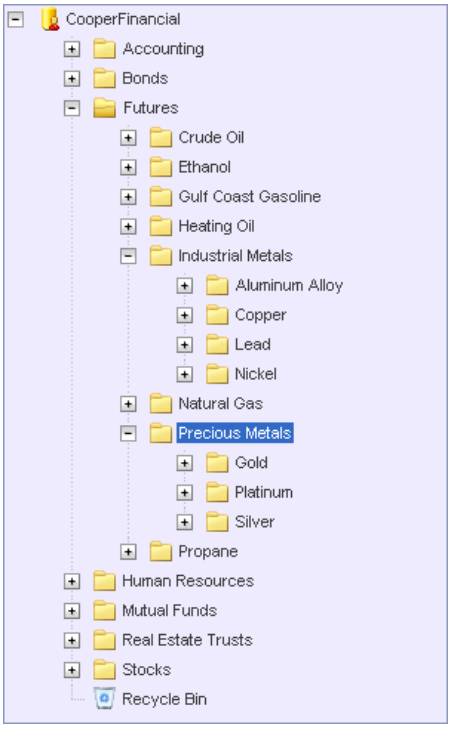
This type of Folder Browser URL is useful for accessing a specific folder without navigating through the entire repository. For example, every employee at Castle Industries has his or her own Human Resources folder, which contains personal files such as resumes, performance reviews, tax forms, insurance information, and more. To make it easier for employees to find their folders, Emma, the head of the HR department, creates custom Folder Browser URLs for each employee using their folder's entry ID number. When she is finished, she e-mails each folder URL to each employee, who will be directed to their personal Human Resources folder when they paste it in their Internet browser.



Display Folder as Root Folder

In addition to using URLs to display a specific folder in the Folder Browser, you can also create URLs that will display a particular folder as the new root of the folder tree. This type of URL is useful if you only tend to work with one folder or set of folders in your repository. Root folder URLs use the following syntax structure:

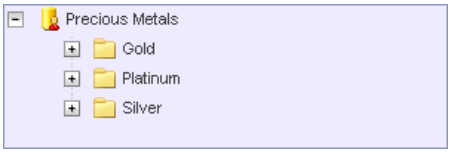
*http://**servername**/laserfiche/index.aspx?db=**repositoryname**#id=**id**;view=newroot*



You can create your own custom root folder URL by replacing **servername** with the name of the server where Web Access is installed, **repositoryname** with the name of your Laserfiche repository, and **id** with the folder's entry ID number.

For example, Dan works for Cooper Financial, which has organized its very large repository into groups of folders based on financial markets or departments (as seen in the folder tree on the right). Dan only accesses the "Precious Metals" folder and its subfolders when he uses the Cooper Financial repository. Rather than navigate through the entire repository each time he needs to find those folders, he can create a URL that will open Web Access with the "Precious Metals" folder as the root, allowing him faster access to the folders he uses.

For easy access, Dan adds the URL to an Internet Explorer shortcut that he places on his desktop. Whenever he opens the shortcut and logs into Web Access, he will be taken to the Cooper Financial repository with the "Precious Metals" folder as the root (as seen in folder tree on the right). He can also share the URL with others in his department, who will be taken to the same set of folders when they paste it into their Internet browsers.



To find a folder's entry ID number:

4. Navigate to the folder whose entry ID you want to find.
5. Right-click the folder and select **Properties**.
6. In the **Properties** dialog box, identify the number next to **Entry ID**. This is the document's entry ID number.

Document Viewer URLs

In addition to the Folder Browser URLs, there are three types of Document Viewer URLs. These URLs allow you to: open an imaged document in the Document Viewer, open an imaged document to a specific page, and open an imaged document to a particular annotation. Like Folder Browser URLs, the Document Viewer URLs can be copied and pasted, and shared with other Web Access users who have repository access and appropriate security rights to link directly to a particular imaged document, page, or annotation.

Open Document in Document Viewer

When you open an imaged document in the Document Viewer, Web Access generates a URL in the form

*http://**servername**/laserfiche/index.aspx?db=**repositoryname**#id=**id**;view=pages*

where **servername** is the name of the server where Web Access is installed; **repositoryname** is the name of your Laserfiche repository; and **id** is the entry ID number of the imaged document you opened. Copying this URL enables you to send it (via e-mail, instant messenger, etc.) to another user, who will be directed to the document when he or she pastes the link into an Internet browser.

Open Document to a Specific Page

In addition to creating and sharing URLs that link to a particular document, you can also create links that open to a specific page in the document using the following syntax structure:

*http://**servername**/laserfiche/index.aspx?db=**repositoryname**#id=**id**;view=pages;page=**pagenumber***

To complete the URL, replace **servername** with the name of the server where Web Access is installed; **repositoryname** with the name of your Laserfiche repository; **id** with the document's entry ID number; **pagenumber** with the specific page number.

To copy the URL link to a specific page

1. Open the specified imaged document in the Document Viewer.
2. In the Thumbnails Pane, right-click the page you want to create a URL link to and select **Copy Link**.
3. If you are viewing Web Access in Internet Explorer, the link will be copied directly to your clipboard. If you are viewing Web Access in Firefox or Chrome, the **Copy Link** dialog box will appear.
4. In the **Copy Link** dialog box, select the link and click **Copy Link**. If the **Copy Link** button does not appear, you can manually copy the link selecting it and pressing **CTRL + C**.

This type of URL is helpful when you want to point another user to a certain page of a particularly long document. For example, Tim is a clerk in the Los Angeles City Council's office and he wants to direct his fellow clerk, Tammy, to a section from last month's council agenda. Rather than share the standard document URL with Tammy and force her to wade through the entire agenda to find the section, Tim can create his own URL that will open the agenda to the specific page where the section begins. He knows the document's entry ID number is 1028, and the specific section starts on page 49 of the agenda. Along with the appropriate server and database names, he can create the URL

*http://la.gov/laserfiche/index.aspx?db=CityCouncil#id=**1028**;view=pages;page=**49***

and send it to Tammy, who will be directed to that specific page when she opens the link, provided she has the necessary repository access and security rights.

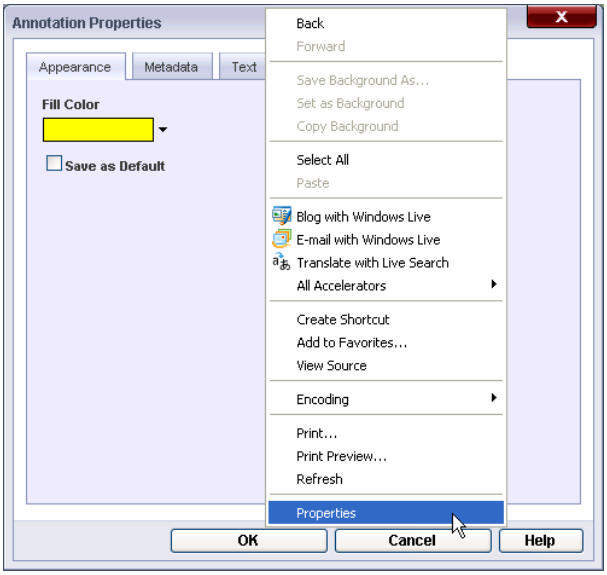
Open Document to a Specific Annotation

You can also create URL links that will open an imaged document to a page with a specific annotation in focus. This is particularly useful if you want to direct another user's attention to an annotation that may be of particular importance. For example, Paul works for the Beaver County State Attorney's office and, in preparation for an upcoming trial, he has added a several sticky notes with important remarks to the case file. He wants his coworker Jennifer to review one of his notes, but rather than make Jennifer search through the entire 80-page case file to find the specific note, he can create a URL link that will open the case file directly to that sticky note when she pastes the URL in her Internet browser (if she has the requisite repository access and security rights).

You can create your own URLs that will link to a document with a specific annotation in focus using the following syntax structure:

*http://***servername***/laserfiche/index.aspx?db=***repositoryname***#id=***id***;view=pages;page=***pagenumber***;annotation=***annotationID**

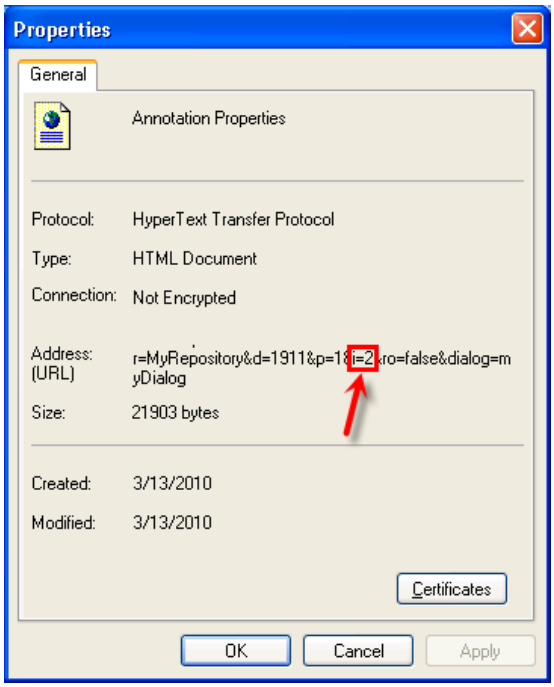
To complete the URL, replace **servername** with the name of the server where Web Access is installed; **repositoryname** with the name of your Laserfiche repository; **id** with the document's entry ID number; **pagenumber** with the page number the annotation appears on; and **annotationID** with the annotation's ID number.



Depending on your Internet browser, the steps to find the annotation's ID number will vary.

To obtain the annotation ID number using Internet Explorer:

1. Open the document in the Document Viewer, navigate to the annotation, right-click it, and select **Properties**.
2. In the **Annotation Properties** dialog box, right-click anywhere and select **Properties** again.
3. In the **Properties** dialog box, next to **Address: (URL)**, identify the numeric value that immediately follows the syntax *i*=. This number is the annotation ID number.

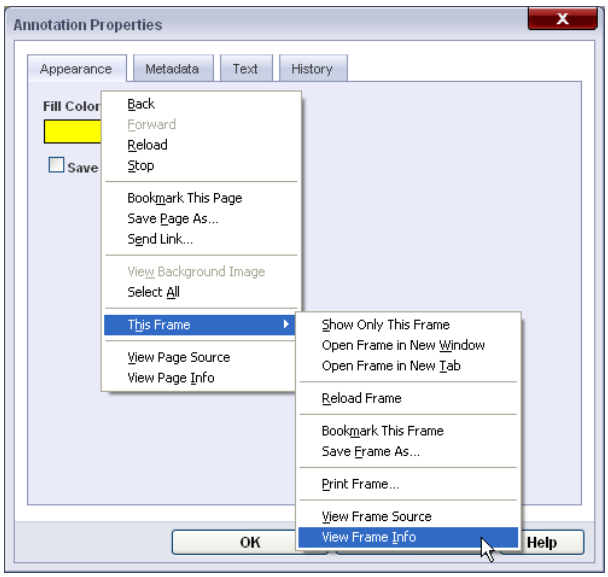


Note: In the example on the right, the annotation ID number is 2.

Note: You may have to highlight the URL and scroll down to see the portion of the URL you are looking for.

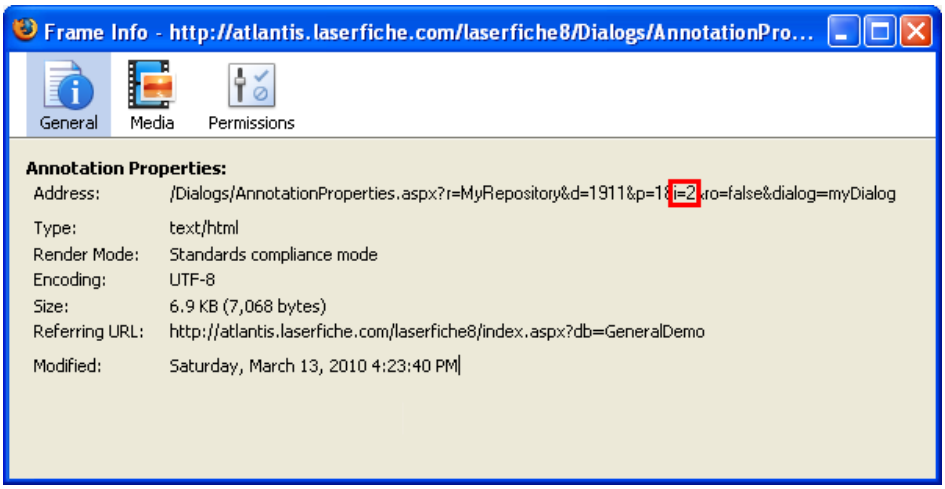
To obtain the annotation ID number using Firefox:

1. Open the document in the Document Viewer, navigate to the annotation, right-click it, and select **Properties**.
2. In the **Annotation Properties** dialog box, right-click anywhere, point to **This Frame**, and select **View Frame Info**.
3. In the **Frame Info** dialog box, next to **Address: (URL)**, identify the numeric value that immediately follows the syntax *i*=. This number is the annotation ID number.



Note: In the example below, the annotation ID number is 2.

Note: You may have to highlight the URL and scroll down to see the portion of the URL you are looking for.



Checking-In or Checking-Out an Imaged Document via URL

For imaged documents under version control, you can create URL links that will check in or check out a document. You can accomplish this by including the **action** parameter at the end of the URL. Using the action parameter, you can tell Web Access to perform one or more check in or check out related actions when the URL is clicked. The following list shows the available actions and their associated syntax.

action=Checkout checks out an imaged document.

- *http://servername/laserfiche/index.aspx?db=repositoryname#id=id;* ***action=Checkout***

When checking in a document via a URL, you can specify the check in comment and whether to show the **Check In** dialog box.

action=Checkin;versioncomment=*comment* checks in a document and specifies the check in comment.

- *http://servername/laserfiche/index.aspx?db=repositoryname#id=id;* ***action=Checkin;versioncomment=Updated the document***

action=Checkin;showcheckindialog=n checks in a document without showing the Check In dialog box.

- *http://servername/laserfiche/index.aspx?db=repositoryname#id=id;****action=Checkin;showcheckindialog=n***

These parameters can both be used in a link. For example, you could create a URL that checks an imaged document, specifies a check in comment, and skips the Check In dialog box.

- *http://servername/laserfiche/index.aspx?db=repositoryname#id=id;****action=Checkin;versioncomment=****comment****;showcheckindialog=n***

Electronic Document URLs

When you open an electronic document, Web Access generates a URL in the form

http://***servername***/laserfiche/ElectronicFile.aspx?db=***repositoryname***&id=***id***

where **servername** is the name of the server where Web Access is installed; **repositoryname** is the name of your Laserfiche repository; and **id** is the entry ID number of the electronic document. Copying this URL enables you to send it (via e-mail, instant messenger, etc.) to another user, who will open the document when he or she follows the link.

To copy the URL link to one or more electronic documents

1. Right-click the electronic document and select **Copy Link**.
2. If you are viewing Web Access in Internet Explorer, the link will be copied directly to your clipboard. If you are viewing Web Access in Firefox or Chrome, the **Copy Link** dialog box will appear.
3. In the **Copy Link** dialog box, select the desired link and click **Copy Link**. If the **Copy Link** button does not appear, you can manually copy the link by pressing **CTRL + C**.

Customizing Electronic Document URLs

You can customize electronic document URLs by including the **mode** parameter at the end of the URL. This parameter specifies how an electronic document will be opened (either through the Web Access Office Integration or by exporting and downloading it) and whether the document will be checked out. The following list shows the available modes and their associated syntax.

mode=export-checkout downloads and checks out an electronic document.

- *http://servername/laserfiche/ElectronicFile.aspx?db=repositoryname&id=id&**mode=export-checkout***

mode=export downloads an electronic document.

- *http://servername/laserfiche/ElectronicFile.aspx?db=repositoryname&id=id&**mode=export***

mode=officeplugin opens an electronic document with the Web Access Office Integration. If the electronic document is not an Office document, it will be downloaded instead.

- *http://servername/laserfiche/ElectronicFile.aspx?db=repositoryname&id=id&**mode=officeplugin***

mode=officeplugin-checkout opens an electronic document with the Web Access Office Integration and checks out the document. If the electronic document is not an Office document, it will be downloaded instead.

- *http://servername/laserfiche/ElectronicFile.aspx?db=repositoryname&id=id&**mode=officeplugin-checkout***

The **mode** parameter can also be included in URLs for electronic documents to check in those documents. Set **mode=checkin** to check in an electronic document simply by following the link.

When checking in a document via a URL, you can specify how the document should be added to the repository.

mode=checkin checks in a document.

- *http://servername/laserfiche/ElectronicFile.aspx?db=repositoryname&id=id&**mode=checkin***

mode=checkin-newlink checks in an electronic document as a new version in the link group. If a link group does not exist, one will be created.

- *http://servername/laserfiche/ElectronicFile.aspx?db=repositoryname&id=id&**mode=checkin-newlink***

mode=checkin-newversion Checks in an electronic document as a new version and places it under version control if necessary.

- *http://servername/laserfiche/ElectronicFile.aspx?db=repositoryname&id=id&**mode=checkin-newversion***

mode=checkin-newdocument checks in an electronic document as a new document.

- *http://servername/laserfiche/ElectronicFile.aspx?db=repositoryname&id=id;**mode=checkin-newdocument***

mode=checkin-overwrite checks in an electronic document, overwriting the repository copy.

- *http://servername/laserfiche/ElectronicFile.aspx?db=repositoryname&id=id&**mode=checkin-overwrite***

Metadata URLs

When you open an entry in the Metadata Viewer (which displays the fields, tags, links, versions, and digital signatures associated with the entry) Web Access generates a URL in the form

*http://**servername**/laserfiche/index.aspx?db=**repositoryname**#id=**id**;view=metadata*

where **servername** is the name of the server where Web Access is installed, **repositoryname** is the name of your Laserfiche repository, and **id** is the document or folder's entry ID number.

You can further customize the URL to specify which tab of the Metadata Viewer will be displayed by using different syntax after *view*=. For example:

view=metadata;type=tags: show an entry in the Metadata Viewer with the Fields/Tags tab open.

- *http://servername/laserfiche/index.aspx?db=repositoryname#id=id;* ***view=metadata;type=tags***

view=metadata;type=links: show an entry in the Metadata Viewer with the Links tab open.

- *http://servername/laserfiche/index.aspx?db=repositoryname#id=id;* ***view=metadata;type=links***

view=metadata;type=versioncontrol: show an entry in the Metadata Viewer with the Versions tab open.

- *http://servername/laserfiche/index.aspx?db=repositoryname#id=id;* ***view=metadata;type=versioncontrol***

view=metadata;type=digitalsignatures: show an entry in the Metadata Viewer with the Digital Signatures tab open.

- *http://servername/laserfiche/index.aspx?db=repositoryname#id=id;* ***view=metadata;type=digitalsignatures***

Like other types of Web Access URLs, you can use this general syntax to create your own custom Metadata URL that will link to other documents and display them in Metadata Viewer by entering the appropriate information that applies to your specific servers, repositories, and document IDs.

Search URLs

Search URLs are used by Web Access to specify what type of search is performed, what search terms are used, and whether the search will be performed across the entire repository or within a single document. There are five types of Search URLs—text search, advanced search, Quick Search, in-document text search, and saved search—each of which will be explored in more depth in this section.

Text Search URLs

The simplest type of search URL is the text search URL, which allows you to perform searches for terms in document text across your entire repository. The text search URL uses the syntax structure

*http://**severname**/laserfiche/index.aspx?db=**repositoryname**#view=search;search=**searchquery***

which can be modified to create your own custom URLs. To create your own text search URL, replace **servername** with the name of the server where Web Access is installed, **repositoryname** with the name of your Laserfiche repository, and **searchquery** with the search term you want to find.

Like other types of Web Access URLs, text search URLs can easily be sent to other users (via e-mail, instant message, etc.) to share a particular set of search results. For example, Tom works as a records clerk in the traffic division of the Los Angeles Police Department and Beth, an officer in the department, has requested all entries in the repository that include the ZIP codes for Brentwood (**90094**), Echo Park (**90026**), or Westlake (**90057**) in the document text. Using the traffic division's server and database names, Tom can generate a separate text search URL for each ZIP code:

*http://LAPD.org/laserfiche/index.aspx?db=TrafficDivision#view=search;search=**90094***

*http://LAPD.org/laserfiche/index.aspx?db=TrafficDivision#view=search;search=**90026***

*http://LAPD.org/laserfiche/index.aspx?db=TrafficDivision#view=search;search=**90057***

He can send Beth all three URLs via e-mail, and when she opens the URL for a particular ZIP code, she will be shown the corresponding search results (assuming she has the necessary repository access and security rights).

Advanced Search URLs

For users looking to perform searches that are more complex than a simple text search, one option is advanced search URLs, which allow you to run various searches using advanced search syntax. Advanced search URLs use the general syntax structure

*http://**severname**/laserfiche/index.aspx?db=**repositoryname**#view=search;search=**searchquery***

which can be modified to create your own custom URL by replacing **servername** with the name of the server where Web Access is installed, **repositoryname** with the name of your Laserfiche repository, and **searchquery** with the advanced search syntax for your search criteria.

> **Note:** Be aware that advanced search URLs use the same syntax structure as text search URLs. The only difference appears when you specify your search query. If you replace **searchquery** with a search term, such "October," the URL will behave like a text search URL. If replace **searchquery** with an advanced search string, such as {LF:id=45}, the URL will behave like an advanced search URL.

Advanced search URLs allow you to take advantage of the wide range of searches made available by advanced search strings. For example, Sarah works in her company's shipping department. At the beginning of every week, she searches for all entries that have blank field values for the Shipping Address field and fills in the missing information. To perform this search, she must use the advanced search string {[]:[Shipping Address]=""}. Rather than opening the Search Pane and typing in the syntax for this search every week, she decides to create an advanced search URL that she can click on to quickly run the search whenever she needs it. Using the shipping department's server and database names, along with her advanced search syntax, Sarah can generate her URL:

*http://ShipDept/laserfiche/index.aspx?db=*Shipping*#view=search;search=***{[]:[Shipping Address]=""}***

For more information on advanced search syntax, see Advanced Search Syntax 8.3.

Quick Search URLs

Like text search URLs, Quick Search URLs perform searches for entries across your entire repository. However, instead of being limited to only document text searches, Quick Search URLs allow you to take advantage of your Quick Search options—which include text, entry name, field, and annotation searches, as well as any custom searches you have created. When using a Quick Search URL, it is important to remember that it will only perform a search based on the searches you have selected from your Quick Search drop-down menu. For example, if you create a Quick Search URL that is intended to find any fields, entry names, or document text containing the word

"resume," and your Quick Search options are configured to only search text (such as in the image here), your URL may not return the intended results.

The standard syntax structure for a Quick Search URL is

*http://**severname**/laserfiche/index.aspx?db=**repositoryname**#view=search;quicksearch=**searchquery***

which can be modified to create your own custom search URL by replacing **servername** with the name of the server where Web Access is installed, **repositoryname** with the name of your Laserfiche repository, and **searchquery** with the search term you want to find.

Like other types of Web Access search URLs, Quick Search URLs provide a convenient way to share search results with other users and allow you to create easy access to searches that you use often.

For example, Kevin works in the accounting department for Xpress Paper Company, where he is responsible for processing the expense reports filed by the company's salespeople. At the end of every month, he searches for any reports that still need to be processed by running a Quick Search for fields containing the value "Expenses Pending." Because he only runs the search once a month, he sets up a calendar reminder for the last Monday in each month, and he includes a Quick Search URL for the "Expenses Pending" search in the reminder's notes. When the reminder pops up at the end of every month, it not only reminds Kevin to process the reports, but also conveniently displays his Quick Search URL, allowing him to run the search without even opening Web Access to configure it.

> **Note:** Given that Quick Search URLs run searches based on a user's current Quick Search settings, search results may vary when these URLs are shared between users with different Quick Search settings or used after your own settings have been changed. To avoid this, make sure the matching settings have been applied before opening a Quick Search URL.

In-Document Text Search URLs

In addition to being able to share URL links to repository-wide searches, users can also use URLs to share results for text searches performed within a specific document. For example, John searches within a sales record for the company name "GogoTech," and he wants to share the results with his co-worker, Karen. If John and Karen have access to the same repository, as well as appropriate security rights, John can copy the URL and send it to Karen, who will be directed to the document and the corresponding search results when she pastes the URL in her Internet browser.

You can also create your own in-document search URLs using the following syntax structure:

*http://**severname**/laserfiche/index.aspx?db=**repositoryname**#id=**id**;view=pages;find=**searchterm***

To complete the URL, replace **servername** with the name of the server where Web Access is installed, **repositoryname** with the name of your Laserfiche repository, **id** with the document's entry ID number, and **searchterm** with the search term you want to find.

Saved Search URLs

The last type of search URL is the saved search URL, which allows you to run any of the searches that you have previously created and saved from the Search Pane. Saved search URLs use the syntax structure

*http://**severname**/laserfiche/index.aspx?db=**repositoryname**#view=search;searchname=**searchname***

To create your own custom URL, replace **servername** with the name of the server where Web Access is installed, **repositoryname** with the name of your Laserfiche repository, and **searchname** with the name of the saved search you want to run.

Saved searches are useful if you frequently use a particular set of search types together in a search. Using URLs to access these saved searches can make running them even easier and more efficient. For example, Christina, an admissions officer, runs a search each week for all admissions applications that have been submitted over the course of the previous week and still need to be reviewed. Her search includes a Within Folder search for the "Applications" folder, a Created search for all entries created within the last week, and an Admissions Application template search for all entries with that template applied and a value of "Pending Review" in the Status field. She saves the search with the name "Applications to Review." To make it easier to access her saved search, Christina creates a custom URL by entering her department's server and database names, and the search's name:

http://SHCC/laserfiche/index.aspx?db=Admissions#view=search;searchname=Applications to Review

Now, whenever she clicks on the URL, she will be able to run the search without having to open the Search Pane or configure search types again.

> **Note:** A saved search URL runs the designated search exactly as it was saved. This includes not only search types, but also any search terms that were present as the time it was saved. If no search terms were saved with the search, you may receive an invalid search error when running it via URL. For more information on saving searches, see the Web Access help files.

Using Login Profiles with URL Linking

In addition to creating custom URLs that link to specific documents, folders, search results, and more, you can also create your own URLs that use login profiles to grant whoever clicks them access to a repository as a particular user. In its simplest form, a URL that uses a login profile has the general syntax structure

*http://**severname**/laserfiche/index.aspx?db=**repositoryname**&profile=**profile name***

where **servername** is the name of the server where Web Access is installed, **repositoryname** is the name of your Laserfiche repository, and **profilename** is the name of a login profile that you have configured.

Note that you can also modify any of the Web Access URLs discussed in this paper to include a login profile by attaching the **&profile=profilename** syntax string immediately after the name of your Laserfiche repository. For example, if you wanted to create a URL that opened a specific document in the Document Viewer while using a login profile, it would take the general form

*http://**servername**/laserfiche/index.aspx?db=**repositoryname**&profile=**profilename**#id=**id**;view=pages*

Applying login profiles to your URLs is useful if you want to control the type of access and security rights that people who use your URL will have when they click on it.

For example, Indigo Insurance uses Web Access as a portal for its customers to upload their claims information. Indigo also uses Web Access to manage its own internal company records and needs to restrict its customers from this other information when they access the Indigo repository. To satisfy both of these functions, Indigo's Laserfiche administrator, Jim, creates a user with limited security and entry access rights that will serve as the user login for every customer who accesses the repository. He also adds a login profile named "Customer" to accompany this generic user. Jim then creates a Folder Browser URL that will direct customers to Web Access with the "Customer Insurance Claims" folder (entry ID **2019**) as the root folder, in order to leave customers unaware of the rest of the company repository. Along with the Indigo server and database names, he attaches the login profile syntax to create the custom URL

*http://Indigo/laserfiche/index.aspx?db=IndigoInsurance&profile=**Customer**#id=**2019**;view=newroot*

which the company links through their corporate Web site. When customers click on the link, they will be logged in to Web Access using the "Customer" profile and brought directly to the "Customer Insurance Claims" folder.

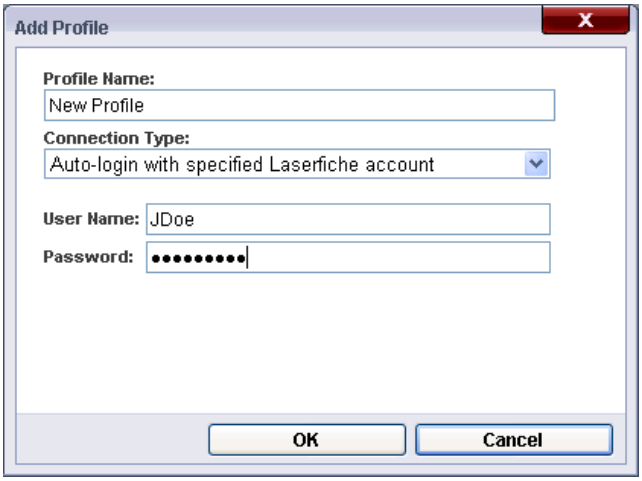
Before you can specify a particular login profile name in your URL, it must be configured using the Web Access Configuration Page.

To configure a login profile for your Web Access repository:

1. Open the **Web Access Configuration Page**.
2. Under **Repositories**, locate your repository and click the corresponding **Add Profile** button.
3. In the **Add Profile** dialog box, configure the following:
   - In the **Profile Name** field, specify the name you want to give your new auto-login profile.

     Note: This is the name you will use to designate a particular login profile in your URLs.

   - Under **Connection Type**, specify if you want to automatically log in using a specific Laserfiche account or using an integrated Windows account.
   - Use the **Username** and **Password** fields to provide valid login credentials for the Laserfiche or Windows account you want to associate with this profile.



     Note: You must provide login credentials for a Laserfiche or a Windows account that has already been configured for your repository in the Administration Console.

4. Click **OK**.

Note: Login profiles are configured on a per-repository basis.

Security and URL Linking

Having access to a URL does not necessarily mean having access to the information linked by that URL. As with anything stored in Web Access, a user's ability to access the information linked by a URL is subject to that user's specific security rights. Without the proper repository access and other security rights required to view a particular document, folder, etc., a user would be unable to access the information linked by a URL.

To explore the ways that security and shared URL links can interact, consider the following example:

Laura, a salesperson for BNC Software, has reviewed a purchase order for one of her clients and attached a sticky note with special instructions for verifying the payment for her colleague, Mark, in the finance department. To make it easier for Mark, Laura creates a Document Viewer URL that links directly to the document with that specific sticky note annotation in focus and sends it to him.

When Mark clicks on the link, he will be asked to log in to the repository Laura designated in her URL (unless he is already logged in to that repository). This is the first step in determining if Mark can access the information linked by Larry's URL. If Mark does not have valid login credentials for the repository, he will be taken back to the Web Access login page and he will not be given access to the document or the annotation. If he does have valid credentials, however, Web Access will open the repository.

Assuming Mark is granted access to the repository, Web Access then determines if he has the proper entry and volume access rights for Laura's purchase order. To view the document, Mark must have the Read entry access right for the document and the Read volume access right for the volume where the document is stored. If, for example, he has Read access for the document but not the volume, he will be able to open the document, but he will not be able to view its pages. Conversely, if he has Read access for the volume but not the document itself, he will not even able to open the document in the first place.

Entry access rights also apply to whether or not Mark can see the annotation with Laura's instructions. To view the annotation, Mark must not only have access to the document and the volume where the document is stored, but he must also have the See Annotations access right for the document. Without this right, the document will appear as if no annotations have been added, and he will not be able to view Laura's note or its instructions.

If the URL is intended for your own use, security is not necessarily an issue, because your security settings aren't likely to change, even if you continue to use the same URL over a long period of time. However, if you intend to share a URL with other users, it is very important to remember that their security settings must provide appropriate access to the information linked by your

URL. Without *all* of the necessary security rights in place, a user may not be able to view the folder, document, annotation, search result, or other item you intended to share.

Web Scanning URLs

You can pass custom parameters through Web Access to customize how Web Scanning will load. For example, you can specify that Web Scanning should launch with a specific default template and field values. You can also specify parameters that can hide certain parts of the Web Scanning user interface.

See the following basic form of a custom Laserfiche Scanning URL:

lfwa80://scanning/***Location***/ScanningService.asmx?***customparameters***;

where **Location** is the URL to the **ScanningService.asmx** page and **customparameters** is the parameters that you'll use to customize the URL.

Laserfiche Scanning accepts the following parameters:

Parameter	**Description**
r=*RepositoryName*	Specifies the Laserfiche repository name. The specified repository must be listed on the Web Access Configuration page. The parameter is required for all custom Scanning URLs.
b=*EntryID*	Loads Web Scanning in basic mode and scans into the specified entry. By default, Scanning launches in Standard mode if the URL does not include the b or c parameter.
c=*EntryID*	Loads Web Scanning in standard mode and scans into the specified entry. By default, Scanning launches in Standard mode if the URL does not include the b or c parameter.
d=1	Specifies that the entry ID set on the b or c parameter is a document and that Web Scanning will scan into the existing document. This parameter is required if the EntryID specified for the b or c parameter is a document.
p=*PageNumber*	If scanning into an existing document, Scanning will insert new pages after the specified page number.
ci=*LanguageString*	Loads Web Scanning in a different language mode if the appropriate Laserfiche language pack is installed.

	The *LanugageString* should be one of the following two-letter codes, which correspond to the language packs you have installed: • **es** – Spanish • **en** – English • **ar** – Arabic • **fr** – French • **it** – Italian • **pt-br** – Portuguese
rtl=1	Loads Web Scanning in Right-To-Left user interface mode.
cl=*EntryID*	Specifies that Scanning will automatically fill in the template and field data with the same values as the specified entry.
custom=*CustomizationString*.	Specifies default values when loading Scanning and whether certain parts of the user interface is disabled.

The following list details acceptable values for the **CustomizationString**.

Keyword	**Description**
name:'*DocumentName***'**	Specifies the default document name.
path:'*FolderPath***'**	Specifies the default destination Laserfiche folder path
volume:'*VolumeName***'**	Specifies the default destination Laserfiche volume using the volume name.
volid:'*VolumeID***'**	Specifies the default destination Laserfiche volume using the volume ID.
template:'*TemplateName***'**	Specifies the default Laserfiche template to use for the scanned document
[*FieldName***]'***FieldValue***'**	Specifies default field values. For a multi-value field, separate multiple values with a | character.

{*TagName*}'*TagComment*'	Assign a default tag to the scanned document.
(*AttributeName***)'***AttributeValue*'.	Set a user attribute value for that specific instance of Laserfiche Scanning.
(**ProtectedItems)'***IntegerValue*'.	A user attribute that locks certain default document settings as read-only in the Scanning user interface. ***IntegerValue*** can be a sum of the following values: 1. User cannot change the default template. 2. User cannot change the default document name. 3. User cannot change the default volume. 4. User cannot change the default destination folder path.

Sample custom Scanning URLs:

The following sample launches Scanning in Basic mode and tells Scanning to

- Connect to a repository named "MyRepository"
- Scan into an existing document that has an entry ID of 434166
- Insert new pages after page 3

lfwa80://scanning/http://MyWebServer/laserfiche/App_Services/ScanningService.asmx?r=MyRepository&b=434166&d=1&p=3

This next sample launches Scanning in Standard mode and tells Scanning to

- Connect to a repository named "MyRepository"
- Scan new documents into an existing folder that has an entry ID of 22307
- Set the default document name to "MyNewDoc"
- Set the default template to "General"
- Set the value of the Document field to "MyField Value"
- Prevent the user from being able to change the default template or path of new documents

lfwa80://scanning/http://MyWebServer/laserfiche/App_Services/ScanningService.asmx?r=MyRepository&c=22307&custom=name:'MyNewDoc'template:'General'[Document]'MyFieldValue'(ProtectedItems)'9'

The following sample launches Scanning in Standard mode and tells Scanning to

- Connect to a repository named "MyRepository"
- Scan new documents into the "\Folder 1\SubFolder 2" folder
- Set the default document name to "MyNewDoc"
- Set the default volume to volume ID 124
- Set the default template to "General"
- Set 3 default values for a multi-value field named "Author"
- Prevent the user from modifying the default document name, template, path, and volume.

lfwa80://scanning/http://MyWebServer/laserfiche/App_Services/ScanningService.asmx?r=MyRepository&custom=name:'MyNewDoc'path:'\\Folder 1\\SubFolder 2'volid:'124'template:'General'[Author]'Value1|Value2|Value3'(ProtectedItems)'15'

WebLink URLs

The base form of all WebLink URLs looks like the following:

http://*Servername*/WebLink8/*Page*.aspx?dbid=x

Replace ***Servername*** with the name of your WebLink Web server.

Replace ***Page*** with one of the following choices:

- **Login.aspx**: to view the Welcome page.
- **Browse.aspx**: to open the Folder Browser.
- **DocView.aspx**: to view or download a document.
- **Search.aspx**: to see search results.

Replace the **x** with the dbid number of the desired repository connection as configured in the WebLink Administrator's Utility.

You can then specify additional parameters depending on what ***Page*** you chose.

To view a specific repository:

- *http://Servername/WebLink8/**Login.aspx?dbid=x***

To directly open a specific folder:

- http://*Servername*/WebLink8/**Browse.aspx?dbid=x&startid=y**

With Browse.aspx, you must specify the folder you want to open. After **started=**, specify the entry ID of the folder you want to open.

To directly open a specific document:

- http://*Servername*/WebLink8/**DocView.aspx?dbid=x&id=y**

With DocView.aspx, you must specify the document you want to view. After **id=,** specify the entry ID of the document you want to open. This URL will open the WebLink Document Viewer to page 1 of the specified document.

DocView.aspx supports additional options that let you control how to open that document.

To directly open a specific page of a document:

- http://*Servername*/WebLink8/**DocView.aspx?dbid=x&id=y&page=z**

To directly download an imaged document as a PDF:

- http://*Servername*/weblink8/**DocView.aspx?dbid=x&id=y&openpdf=true**

> **Note:** The **openpdf** parameter will be ignored if your repository is configured to require an export reason.

To directly download an electronic document:

- http://*Servername*/WebLink8/**DocView.aspx?dbid=x&id=y&openfile=true**

Search

To directly open a specific search result:

- http://*Servername*/WebLink8/**Search.aspx?dbid=x&searchcommand=*searchquery***

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