

Laserfiche Avante 9.1: Deployment Guide

White Paper

December 2013

Laserfiche®

Table of Contents

Laserfiche Avante 9.1: Deployment Guide	1
How Laserfiche Licensing Works	3
Laserfiche Server Licensing	3
Laserfiche Client Licensing.....	4
Laserfiche Workflow Licensing.....	4
Other Products	5
Types of Licenses	5
Named User Licenses	5
Public Portal Licenses.....	6
License Interaction in the Repository.....	7
License Allocation and Repository Authentication	7
License Allocation and Security	8
License Allocation and Auditing.....	8
Deployment Overview.....	9
Install the Laserfiche Server, Client, and Administration Console	9
Create, Register or Migrate a Repository.....	10
Logging In to Your Repository	10
Add Trustees to the Repository, and Allocating Licenses to New Trustees.....	10
Adding Trustees to the Repository.....	11
Allocating Named User Licenses to New Trustees.....	11
Allocate Named User Licenses to Existing Trustees	12
Allocating a Named User License to an Existing Trustee	12
Allocating Named User Licenses to Members of a Windows or LDAP Group	13
Allocate Named Device Licenses.....	15
Review Allocated Named Users and Devices	16
Configure Users for WebLink Public Portal Access.....	17

Laserfiche Avante is an edition of Laserfiche that combines the Laserfiche Server's enterprise content management with Laserfiche Workflow's business process management. Like Laserfiche Rio, Laserfiche Avante gives you powerful, flexible tools for working with your information, but Laserfiche Avante is designed for smaller, single-server sites.

Laserfiche Avante's named user licensing ensures that users who should have access will always be able to log into the repository without fear of the site's licenses being taken up, allows you to set up computer kiosks for more general access, and provides new flexibility for sites that use WebLink for public portal access.

To grant users access to your repository, you will need to allocate your named user licenses. This guide will explain the way that Laserfiche licensing works, including the various license types available with Laserfiche Avante, and then will walk you through the process of setting up your Laserfiche Avante installation, whether you are upgrading an existing repository to Laserfiche Avante or implementing an entirely new Laserfiche Avante repository.

Laserfiche Avante includes the Web Administration Console, which has its own installation as part of the Laserfiche Avante package; E-mail Plug-in and Snapshot, which are installed with the Laserfiche Client; and Laserfiche Workflow, which is a separate installation. You can also license other Laserfiche products with Laserfiche Avante. These products will all be installed normally, according to their individual installation instructions.

How Laserfiche Licensing Works

Laserfiche products must be properly licensed both to install and to run. This section discusses licensing for products that are included with Laserfiche Avante, and for other products you may license.

For more information, see [Laserfiche Licensing and Activation](#) on the Laserfiche Support Site.

Laserfiche Server Licensing

Your Laserfiche Server license determines the edition and version of the Server that can be installed, as well as the features it will support. For instance, to install the Laserfiche Avante Server 9.1.0, you will need a license for the product Server, for the edition Laserfiche Avante, and for the version 9.1. (Version numbers are not specified past the first decimal place in the license, so an 9.1 license can be used to install 9.1.0 and 9.1.1.) A Laserfiche United license, or a Laserfiche Avante 8.2 license, would not work for installing the product. In addition, if the Server license includes a feature, that feature will be supported. For example, if your license includes the feature "Digital Signatures," the Server installation will support digital signatures; if the license does not include that feature, you will not be able to use digital signatures in repositories hosted by that Server. The same is true

for other Server features, such as Records Management Edition and Audit Trail.

In addition, your Server license specifies the number of repositories that the Server can host, and the number of users who will be able to access the Server. For example, if you have twenty-five named user licenses, and one Starter Public Portal license, you can grant up to twenty-five users or devices full connections to your Server, and up to ten people will be able to make concurrent retrieval connections to your site using WebLink. See [Types of Licenses](#), below, for more information.

There are two ways to provide a license when installing the Laserfiche Server. In most cases, you will license your installation by providing an activation key, which can be obtained from your reseller or on the Laserfiche Support Site. In some cases, you may instead receive a license file (lf.licx), which you will provide during the installation.

The other products and components included with the Laserfiche Server installation (such as the Full-Text Search Service) do not require licenses to be installed. If you install them with the Laserfiche Server, you will only need to provide a Server license or activation key; if you install them separately (for instance, if you distribute your Full-Text Search engine to another computer), you will not be prompted for a license at all.

Laserfiche Client Licensing

The Laserfiche Client, desktop Administration Console, and Web Administration Console, along with the other components included in the Laserfiche Client, do not require a license for installation as of version 8.2 and later. You will not be prompted to provide a license when installing them.

Laserfiche Snapshot and the E-mail Plug-in are installed with the Laserfiche Client, but licensed through the Laserfiche Server. This means that they can be installed anywhere and will not prompt you for a license, but can only be used with repositories hosted by Laserfiche Servers that are licensed for them. Laserfiche Avante Servers all include licensing for Laserfiche Snapshot and the E-mail Plug-in.

If you install a legacy Client of version 8.1 or before, you will need a valid license for the version you want to install. You can activate the Laserfiche Server and use the Server license for Client installation in that case.

Laserfiche Workflow Licensing

Laserfiche Workflow 8.3 and later does not require a license if you are installing it for use with a Laserfiche Rio or Laserfiche Avante Server. You will not be prompted for a license when installing either the Workflow Designer or the Workflow Server with Laserfiche Avante.

If you install a legacy Workflow Server of a version prior to 8.3, you will need to provide a license for installation.

See the [Workflow documentation](#) for more information on installing and configuring Laserfiche Workflow.

Other Products

If you are licensed for other products on your Laserfiche Avante site, you will need to provide licenses or activation keys to install them. For instance, if you are licensed for Quick Fields or Web Access, you will need to activate them during installation. If you are licensed for WebLink, you will need to provide a license file for installation. You can refer to the installation guides for specific products for more information on their licensing and installation requirements.

Types of Licenses

There are two basic types of licenses that can be used with Laserfiche Avante: named user licenses and public portal licenses. Named user licenses reserve a connection for a particular user or device, and can be used with any Laserfiche products. Public portal licenses are used only with Laserfiche WebLink, and allow you to provide public read-only access to your repository.

Named User Licenses

Named user licenses are the most common way for Laserfiche users to access the Laserfiche repository. Each named user license is allocated to a single user or device. The named user license is reserved for this user or device—they will always have access to the repository.

Each named user license may be associated with only one Windows account, LDAP account, Laserfiche user or device. Named user licenses cannot be associated with groups; they must be associated with individual users, and cannot be shared.

A single named user license can support up to four simultaneous connections. This means that, for example, a single user could have the Laserfiche Client, Quick Fields, Workflow and an integration script running at the same time, using a single named user license.

There are three types of named user licenses:

A **Directory Named User** license is assigned to a Windows Account or LDAP user. It can be used to connect to any repository on your Laserfiche Server. For example, if the Windows user DOMAIN/JSmith has been allocated a Directory Named User license and the site has two repositories, he can use that single allocated license to log in to either repository.

A **Repository Named User** license is assigned to a Laserfiche user. It is specific to a single user in a single repository, and is not shared between repositories, because the user object to which it is assigned only exists in one repository. For example, if the Laserfiche user JDoe exists in two repositories, and you want that user to be able to log in to both, you will need to allocate two Repository Named User licenses, one for each repository.

A **Named Device** license is tied to a particular computer; any user may log in from that computer, but the license will not be available when accessing the repository from any other computer. Like Directory Named User licenses, Named Devices are not specific to a single repository. For example, if you have a scan station that will be used by multiple scanner operators to scan into two different repositories, you can allocate one Named Device license to that scan station for access to both. Note that Named Device licenses cannot be used with Laserfiche Web Access, WebLink, or the Web Administration Console.

Public Portal Licenses

A public portal license is a license type that allows public users to access the Laserfiche Server through Laserfiche WebLink. Because a WebLink installation may be accessed by the public, it is not feasible to allocate named user licenses to everyone who will need to access the repository through WebLink. With a public portal license, you can make your repository available for public access using WebLink.

Public portal licensed connections are retrieval connections, meaning they can be used to view documents but not modify them. Public portal licenses may only be used with WebLink; they are not available for other applications. They are linked to the specific Laserfiche Server with which they will be used.

Public portal licenses vary depending on how many connections to WebLink they allow. Public portal licenses may allow a specific, limited number of connections, or unlimited connections, depending on the public portal type you have licensed. Large numbers of connections will eventually affect server performance. If you are using unlimited public portal licenses, you must have one public portal license for each CPU on the Laserfiche Server computer that WebLink will connect to. For instance, a Laserfiche Server with two processors would require a dual-CPU public portal license (or two single-CPU public portal licenses) for unlimited access. (Note that a dual-core processor does not count as two processors.)

If you have a public portal license with Laserfiche Avante, it will appear in your Laserfiche Server license.

License Interaction in the Repository

For the most part, license allocation has no effect on other settings in your Laserfiche repository. Allocating a license to a user does not grant them any rights to the repository, nor does it affect their auditing or other settings. By itself, license allocation does not even grant them the rights to log in. It simply indicates that they are capable of connecting to a Laserfiche Server.

This section contains more information on the interaction between license allocation and repository settings.

License Allocation and Repository Authentication

In order for a user to log in to the repository, they must have both a valid license and a user account in the repository that has been granted trusted access. The license may be a named user license allocated to that user, a computer with a named device license that can be used to log in, or access to a WebLink installation that has an associated public portal license. The user account may be a Windows user or LDAP user that has been granted Trusted access to the repository, or a Laserfiche user created in that repository.

Note: A WebLink installation configured to automatically log users in may appear to log them in without a user account. However, users who are automatically logged in are still accessing the repository as a particular account, they are simply not prompted to specify the account name. See [Automatically Log In](#) the WebLink Administration and Configuration Guide for more information.

Because repository authentication is not the same thing as license allocation, you can specify which users should be able to log in to which repositories. Simply allocating a named user license does not bypass the authentication step. A Windows domain or LDAP directory user must have Trusted authentication (either on their own account, or inherited from one of their groups) in order to log in. Without that authentication, they will not be allowed to log in to the repository. See [Windows and LDAP Authentication](#) for more information.

Example: Joe has a Windows domain account (DOMAIN\Joe) that has been granted a named user license. His company has three repositories: Sales, Account Information, and HR. Joe should be able to access the Sales and Account Information repositories, but he should not be able to log in to the HR repository at all. His administrator verifies that he has inherited Trusted authentication to the Sales repository because of his membership in the DOMAIN\Sales domain group, and that he has been granted Trusted authentication to the Account Information group. The combination of his Trusted authentication status and his named user license will allow him to log in to both of those repositories.

However, since he has not been granted Trusted access to the HR repository, he cannot log in to that repository at all, even though he has a named user license.

Because Laserfiche users are specific to each repository, you can simply remove or disable a user who should not be able to log in. This will not affect other repositories. (If the Laserfiche user only exists in one repository, they will automatically be unable to log in to other repositories.)

License Allocation and Security

Regardless of the type of license used to log in—named user, named device, or public portal—users log in as a particular trustee, as mentioned above. Laserfiche security can be configured for those users and the groups to which they belong as usual. License allocation has no effect on security settings.

Important: Even users who do not have a named user license allocated to them specifically will still log in as a particular user, and their security settings depend on their user settings, not their license. For example, if two users with different security access the repository using the same Named Device, they will have different access to information in Laserfiche. Similarly, if two users with different security both log in to WebLink using a public portal license, they will have different access to entries.

License Allocation and Auditing

As with security, auditing is configured and reported by trustee, not by license. Thus, if two different users log in using the same Named Device but as different trustees, they will be audited separately. Similarly, if two different users log in to WebLink using the same public portal license, they will be audited separately.

Note: If you have configured WebLink to automatically log public users in as a particular trustee, they will all be audited collectively. However, this is not because they are using a public portal license. Instead, they are audited collectively because they are all logging in using the same trustee.

Deployment Overview

Deploying Laserfiche Avante has several steps:

- Install and activate your Laserfiche Server.
- Create, register, or migrate a repository.
- Add Windows or LDAP domain accounts, and Laserfiche users, to your repository.
- Allocate named user licenses.
- Allocate named device licenses.
- Configure users for WebLink public portal access.

Install the Laserfiche Server, Client, and Administration Console

Launch the Laserfiche Server installation from the autorun of your installation DVD or downloaded installation package and follow the instructions in the installation wizard. For more information, see [Installing the Laserfiche Server](#) in the Administration Guide.

In most cases, with Laserfiche Avante you will activate your installation to generate your Server license. This will create a Server license that is linked to your specified Server computer. Activation requires an activation key, which you can retrieve from the Laserfiche Support Site.

Note: When you activate your Laserfiche Server, the license that is generated is specific to your Server computer, and cannot be used on other computers.

Once you have installed the Server, install the Laserfiche Client. The Laserfiche Client installation also includes associated applications, such as the desktop Administration Console, Scanning, Snapshot and PhotoDocs. The Laserfiche Client installation does not require a license file as of Laserfiche 8.2 and later. For more information, see [Installing the Laserfiche Client](#) in the Administration Guide.

In order to begin license allocation, you will need to install at least one administration console. Laserfiche has two administration console: the Web Administration Console (which has its own installation, separate from the Laserfiche Server and Client), and the desktop Administration Console (which is part of the Laserfiche Client installation). You can also install and use both types of administration console simultaneously. The Web Administration Console can be installed once and then accessed by browser from anywhere. The desktop Administration Console must be installed on each workstation from which it will be accessed. Both administration consoles allow you to perform the same administrative tasks, and can be used interchangeably.

You can install Workflow and any other products you are licensed for at this point as well, or after you have allocated your named user licenses. You can install the other products normally according to their installation instructions, using activation keys obtained from the Laserfiche Support Site.

Create, Register or Migrate a Repository

Once you have installed your Server, you will need to configure the repository or repositories you will be using with it. If you do not already have a repository hosted on your Laserfiche Server, you can create a new repository, register an existing Laserfiche 9 repository, or migrate a Laserfiche 6 or 7 repository to 9 and then register it. For more information on creating, registering or migration a repository, see [Creating a Repository](#), [Registering/Unregistering a Repository](#) or [Migration from Laserfiche 6 or 7 to Laserfiche 9](#) in the Laserfiche Administration Guide.

Logging In to Your Repository

Named user licenses in Laserfiche Avante must be assigned to users or devices. Both steps—creation or authorization of the trustee, and allocation of the named user license—must be performed before a user can log in.

However, when you begin implementing Laserfiche Avante, you must be able to log in to the Administration Console in order to set up the first Windows Accounts users. In order to facilitate this, Laserfiche Avante allows an administrative connection to the Laserfiche repository to set up the initial users. You can use this connection to log in as any user with the Manage Trustees or Set Trustee Privileges privilege. In new repositories, you can use the Admin user for this purpose. This administrative connection is to allow you to add the accounts necessary for the allocated named users to log in.

Add Trustees to the Repository, and Allocating Licenses to New Trustees

Once you have installed your Laserfiche Server, created a repository, and logged in using your administrative connection, you will need to add the users and groups you want to allow to access your repository. (If you already have users and groups in your repository, you can skip to [Allocating a Named User License to an Existing Trustee](#), below.) You can also allocate named user licenses to these user and groups as you create them. (If you are working with an existing repository and do not need to add additional users, you can skip to the next section.)

Creating a user requires the Manage Trustees privilege. Allocating named user license requires the System Manager role. (See [System Managers](#) in the Administration Guide for more information.)

Adding Trustees to the Repository

In order for users to log in, they must have a user account that has been granted access to the repository. This can be a Windows or LDAP user that has been granted Trusted authentication (or that inherits Trusted authentication from its group membership), or a Laserfiche user configured in that repository. See [Authentication](#) in the Administration Guide for more information.

We recommend using Windows or LDAP users with Laserfiche where possible; see [Benefits of Domain and Directory Groups](#) in the Administration Guide, for more information. You do not need to add members of domain or directory groups individually. You can add an entire Windows domain group or LDAP directory group at once, and all the members of the group will inherit their settings from the parent group.

For more information on adding users to the repository, see [Creating a User](#), [Adding a Windows Account](#), or [Adding an LDAP Account](#) in the Administration Guide for more information.

Allocating Named User Licenses to New Trustees

As you add trustees to the repository, you can also allocate named user licenses to those trustees during the same step.

Laserfiche users must be allocated licenses one by one. Named user licenses may not be allocated to Laserfiche groups. Named user licenses may also not be allocated to entire Windows or LDAP groups, but you can quickly add named user licenses to all individual members of a Windows or LDAP group. See [Allocating Named User Licenses to Members of a Windows or LDAP Group](#), below, for more information.

To allocate a named user license to a new trustee

1. Open the desktop or Web Administration Console. You must be logged in to Windows as a user with the System Manager role.
2. Expand your Laserfiche Server.
3. Expand your repository and log in as a user with the Manage Trustees privilege.
4. Perform one of the following:
 - In the desktop Laserfiche Administration Console, expand the **Users and Groups** node and select one of the following:
 - Windows accounts: Select **Windows Accounts**
 - LDAP accounts: Expand the **LDAP Management** node and select the **LDAP Accounts** node.
 - Laserfiche users: Select **Users**.

- In the Web Administration Console, select one of the following under **Accounts**:
 - Windows accounts: Select **Windows Users/Groups**.
 - LDAP accounts: Select **LDAP Users/Groups**.
 - Laserfiche users: Select **Laserfiche Users/Groups**.

Note: If you are adding LDAP accounts, you will first need to configure your LDAP Server Profile. See [LDAP Accounts](#) in the Administration Guide for details.

5. In the desktop Administration Console, right-click or open the **Action** menu and select **New User**, **New Windows Account**, or **New LDAP Account**, as appropriate. In the Web Administration Console, click the **Add** button.
6. Configure the trustee. See [Creating a User](#), [Adding a Windows Account](#), or [Adding an LDAP Account](#) in the Administration Guide for more information.
7. Before saving the trustee, perform one of the following:
 - In the desktop Administration Console, select the **Repository Named User** or **Directory Named User** option.
 - In the Web Administration Console, ensure that **True** is selected in the **Repository Named User** or **Directory Named User** option.
8. Click **OK** to save the trustee.

Allocate Named User Licenses to Existing Trustees

If you have already set up the trustees for your repository, you will need to mark those users as named users in order to allow them to log in using a named user license. You can do this in one of two ways: from the User and Groups node of your repository, or from the **Named Users and Devices** node for your Server.

Allocating a Named User License to an Existing Trustee

The easiest and fastest way to allocate a named user license to an existing trustee is in the repository's **Users and Groups** node. This allows you to select one or more trustees and add them to the named user list with a single command or button click.

Note: Adding multiple users to the named user list at one time is not currently possible in the Web Administration Console. In both the Web and desktop Administration Console, you can add individual users to the Named User list. See [Administering Named Users with Laserfiche Avante](#) for more information.

If you are adding users by Windows domain or LDAP directory group, you do not need to configure each user individually. See [Allocating Named User Licenses to Members of a Windows or LDAP Group](#), below, for more information.

To allocate named user license to an existing trustee

1. Open the desktop Laserfiche Administration Console. You must be logged in to Windows as a user with the System Manager role.
2. Expand your Laserfiche Server.
3. Expand your repository and log in as a user with the Manage Trustees privilege.
4. Expand the **Users and Groups** node and select the node for the type of user you want to add:
 - Laserfiche users: Select the **Users** node.
 - Windows accounts: Select the **Windows Accounts** node.
 - LDAP accounts: Expand the **LDAP Management** node and select the **Accounts** node.
5. Select the user or users you want to add to the Named Users list. (You can select more than one user to add multiple users at once.)
6. Do one of the following:
 - a. Right-click, or open the **Action** menu, and point to **All Tasks**. Select **Add to Named Users**.
 - b. Click the **Add selected account(s) to the named user collection** toolbar button.

Allocating Named User Licenses to Members of a Windows or LDAP Group

If you are adding Windows Domain or LDAP Directory accounts to your named user list, and the users are members of a group, you can quickly add some or all members of that group without having to add them to Laserfiche directly.

Note that you are not adding the group to the named user list. Instead, you are specifying some or all of the members of the group to be added to the list. Once you have added the group members, they will not be automatically updated when the Windows group is changed. That means that if a user is added to or removed from the group, they will not automatically be added to or removed from the named user list. You will have to manually add any additional members to the group.

If you choose to add all members of a group to the named user list, but there are insufficient named user licenses for all group members, group members will be added in alphabetical order until the license limit is reached. For

example, if you have three named user licenses available, and attempt to add all members of a group containing Adam, Bob, Jill, and Sandy, named user licenses would be allocated to Adam, Bob and Jill, but because there are only three licenses available, Sandy would not receive a license.

To allocate named user licenses to members of a directory group

1. Open the desktop or Web Administration Console, You must be logged in to Windows as a user with the System Manager role.
2. Expand your Laserfiche Server.
3. Expand your repository and log in as a user with the Manage Trustees privilege.
4. Perform one of the following:
 - In the desktop Laserfiche Administration Console, expand the **Users and Groups** node and select one of the following:
 - Windows group: Select **Windows Accounts**
 - LDAP group: Expand the **LDAP Management** node and select the **LDAP Accounts** node.
 - In the Web Administration Console, select one of the following under **Accounts**:
 - Windows group: Select **Windows Users/Groups**.
 - LDAP group: Select **LDAP Users/Groups**.
5. Select the group whose members you want to add. In the desktop Administration Console, right-click or open the **Action** menu, and select **Properties**. In the Web Administration Console, click the group name.
6. In the desktop Administration Console, expand the group name in the **Directory Named Users** option. In the Web Administration Console, click the **View named users assigned** button to open the Directory Named Users dialog, and then expand the group name.
7. **Optional:** To manage a subgroup, expand the subgroup name.
8. Perform one of the following:
 - To add all members of a group to the Named Users list, select the checkbox next to the group name.
 - To add specific members to the Named Users list, select the checkbox next to each user's name.
 - To remove all members of a group from the Named Users list, clear the checkbox next to the group name.

- To remove specific members from the Named Users list, clear the checkbox next to each user's name.
9. Click **OK** to save changes.

Allocate Named Device Licenses

In some cases, you may want to allocate one of your named user licenses to a computer rather than to an individual user. When you allocate a license to a computer rather than to a user, that computer becomes a named device. Any user can log in to the Server using that device, regardless of whether they are themselves named users. This is useful in situations where a variety of users might need to use a workstation for a particular purpose, but only one user at a time will use that workstation. For example, you might set up a computer as a scan station, configure it as a named device, and then have a variety of scanner operators use that scan station. In other words, configuring a named device is useful when you want to allocate a license for a particular purpose (in this case, "scan station") rather than to a particular user.

In order to log in to a repository using a named device, a user must still have a user account in Laserfiche. Named devices do not bypass regular repository authentication. If a particular scanner operator will be logging in to the repository using a named device, you will still need to configure a user account (whether a Windows or LDAP account or a Laserfiche trustee) that they will use to log in. You do not, however, need to allocate a named user license to that user. You can set security for the user as normal, and the user will be audited normally as well.

As with named users, named devices can have up to four simultaneous connections. A named device's license can only be used with the computer to which it has been allocated.

You will need to configure your named devices in the Administration Console before users can log in to them.

To add a named device

1. Log in to the desktop or Web Administration Console as a System Manager account.
2. Select your Laserfiche Server.
3. In the desktop Administration Console, select the **Named Users and Devices** node. In the Web Administration Console, select the **Named Users and Devices** tab.
4. In the desktop Administration Console, right-click or open the **Action** menu and select **New Named Device...** In the Web Administration Console, click the **Add** button and select **Named Device**.

5. In the **Name** option, type the name of the Named Device. You can use any name you want—you could use the computer name, or you could name it according to its purpose (for example, "scan station.")
6. Perform one of the following:
 - In the desktop Administration Console, type the MAC address of the computer you want to add in the **MAC Address** option, or click the Browse (...) button to look up the MAC address:
 - i. Type the machine name of the computer you want to add in the **Machine Name** option.
 - ii. Click the **Lookup** button to automatically look up the MAC address for that computer.
 - iii. Click **OK** to use this MAC address.
 - In the Web Administration Console, type machine name of the computer you want to add in the **Machine Name** option, and then click **Look up** to automatically find the MAC address for that device. You can also add the MAC address manually in the **MAC Address** option.
7. Click **OK** to add the Named Device.

Review Allocated Named Users and Devices

Once you have allocated your named user licenses to trustees and to named devices, you can review your complete list of named users and devices.

To review the named user and device list

1. Log in to the desktop or Web Administration Console as a System Manager account.
2. Select your Laserfiche Server.
3. In the desktop Administration Console, select the **Named Users and Devices** node. In the Web Administration Console, select the **Named Users and Devices** tab.
4. Review the list of named users and devices.

Tip: You can also add or remove named accounts and devices directly from this list. For more information, see the [Administering Named Users with Laserfiche Avante](#) section of the Laserfiche Administration Guide.

You can also view the number of named user licenses that have been allocated, and determine how many licenses you have left to allocate.

To determine the number of available named users

1. Start the Laserfiche Administration Console. You must be logged in to Windows as a user with the System Manager role.
2. Select your Laserfiche Server.
3. Perform one of the following:
 - In the desktop Administration Console, view the Server's license information in the details view:
 - i. Note the number of named user and device licenses currently in use, which is listed next to the label **Named User and Device Licenses Assigned**.
 - ii. Note the number of named user and device licenses licensed to the Laserfiche Server, which is next to the label **Total Named User Licenses**.
 - iii. Subtract line i from line ii. The result is the number of available named user licenses.
 - In the Web Administration Console, view the license information in the **License** section of the **General** tab:
 - i. Note the number of licenses next to the label **Named User and Device Licenses (Assigned/Total)**.
 - ii. Subtract the first number from the second. The result is the number of available named user licenses.

Configure Users for WebLink Public Portal Access

If your Laserfiche Server license includes public portal licenses, any user (whether a Laserfiche user, a Windows user, or an LDAP user) who has been marked as a Read-Only user in the Administration Console will automatically use a public portal license when connecting to the repository via WebLink. If that user has been allocated a named user license, the Laserfiche Server will attempt to connect them using the public portal license first. However, if the public portal license is a limited license and all connections are in use, the Laserfiche Server will then connect them using their allocated named user license.

If a user accessing WebLink has not been marked as Read-Only in the Administration Console, they will not be able to connect using the public portal license. If the user has a named user license, that license will be used when logging in to WebLink. If the user does not have a named user license, they will not be able to log in.

If you have configured one or more trustees for anonymous public access (for instance, if you have your WebLink installation configured to automatically

log visitors in as a particular Laserfiche user), you can enable public portal access for those users by marking them as Read-Only.

Note: For information on configuring users with WebLink, including instructions for configuring automatic anonymous login for public users, see [Administration](#) in the WebLink Administration and Configuration Guide.

Marking a user as read-only

1. Start the desktop or Web Administration Console.
2. Select your Laserfiche Server.
3. Select your Laserfiche repository.
4. Log in as any user with the Manage Trustees privilege.
5. Perform one of the following:
 - In the desktop Administration Console, expand the Users and Groups node and select one of the following:
 - i. Windows accounts: Select **Windows Accounts**.
 - ii. LDAP accounts: Expand the **LDAP Management** node and select the **LDAP Accounts** node.
 - iii. Laserfiche users: Select **Users**.
 - In the Web Administration Console, select one of the following under Accounts:
 - i. Windows Accounts: Select **Windows Users/Groups**.
 - ii. LDAP Accounts: Select **LDAP Users/Groups**.
 - iii. Laserfiche users: Select **Laserfiche Users/Groups**.
6. Select the account you want to mark as read-only. In the desktop Administration Console, right-click or open the **Action** menu, and select **Properties**. In the Web Administration Console, click the group name.
7. Perform one of the following:
 - In the desktop Administration Console, select **Only allow read-only access**.
 - In the Web Administration Console, in the **Access Type** option, select **Read-only**.
8. Click **OK** to save your changes.



Laserfiche Avante 9.1 Deployment Guide
December 2013

Author: Constance Anderson
Editor: Tammy Kaehler, Catherine Ramos
Technical Editor: Justin Pava

Description:

This guide explains the way that Laserfiche licensing works, including the various license types available with Laserfiche Avante. It also walks you through the process of setting up your Laserfiche Avante installation, whether you are upgrading an existing repository to Laserfiche Avante or implementing an entirely new Laserfiche Avante repository.

Laserfiche
3545 Long Beach Blvd.
Long Beach, CA 90807
U.S.A

Phone: +1.562.988.1688
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.

Laserfiche makes every effort to ensure the accuracy of these contents at the time of publication. They are for information purposes only and Laserfiche makes no warranties, express or implied, as to the information herein.

Copyright © 2013 Laserfiche
All rights reserved