Trustee Attributes

White Paper

February 2012

Table of Contents

Trustee attributes are the settings specific to a particular user that influence the way they use the Laserfiche Client or Web Access. This paper explains what trustee attributes are and how administrators can work with them, and provides a reference for several commonly-used attributes.

What is a Trustee Attribute?

Laserfiche products allow users to configure a wide variety of options and settings, such as what columns will be displayed in the Client and how they will be sorted, what Quick Search settings should be used by default, what import options should be used, how the Document Viewer should be displayed, and what scanning options should be used. These settings are saved on a per-user basis: if one user customizes the column display, they will see their own column display, but other users won't be affected. Each setting is stored as its own trustee attribute in the user's properties. Trustee attributes are stored centrally in the repository, which makes them available regardless of what computer or application (such as the Client or Web Access) is used to connect.

Users and Trustee Attributes

When a user makes a change to an option or setting in a Laserfiche client application, such as the Laserfiche Client or Web Access, that setting is automatically saved in that user's trustee attributes. Nothing additional is required from the user. That attribute will remain until the user modifies the same setting (unless it is manually modified by an administrator), and will apply to that user whenever the user accesses the repository.

> **Example**: Bob logs in to the repository and configures the columns for a particular folder. He then changes the way Laserfiche handles imported PDFs, and chooses a default volume for new documents. As soon as he makes those changes, they are automatically and silently saved in Bob's trustee attributes. When Bob next logs in, even though he logs in from another computer, the same columns will be displayed for the folder, and his settings for imported PDFs and the volume for new documents will be used. If he configures new columns, changes the handling of PDFs, or selects a new default volume, his trustee attributes will automatically be updated.

How Trustee Attributes Work

Trustee attributes are stored as part of a user's properties in Laserfiche. They can be set for both Laserfiche and Windows users, and for the Everyone group. Attributes set directly for a particular user take precedence over attributes set on the Everyone group; if a user has configured a particular

setting, and that setting has also been configured on the Everyone group, the user's setting is the one that Laserfiche will use.

When determining what setting to use, Laserfiche client applications will use the following order or precedence: If a user has an attribute set for an option, it will be used. If the user has no attribute set for an option, but the Everyone group does, the Everyone group's attribute will be used. If no attribute has been set for that option on either the user or the Everyone group, the application will use the default setting.

> **Example**: Bob opens the Human Resources folder in the Laserfiche Client. The Client checks to see whether Bob has a column display attribute saved for that folder. Bob has configured the Human Resources folder to display the Template Name and Creation Date columns, so the Laserfiche Client displays those columns.
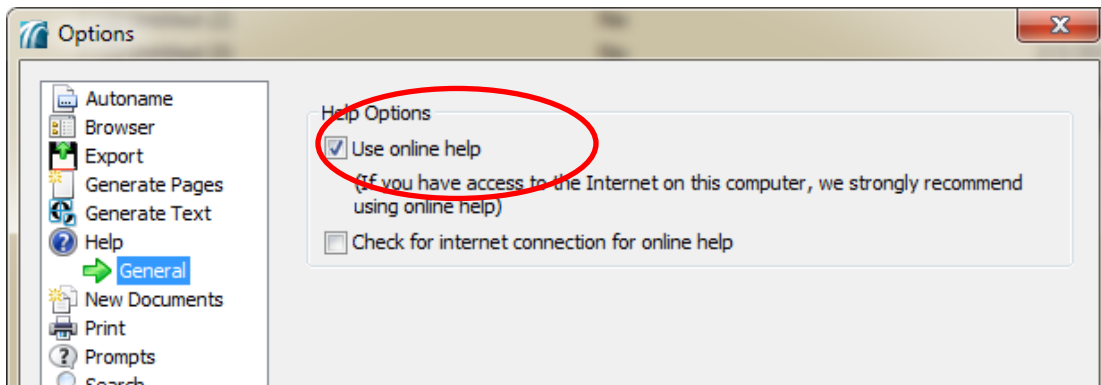>
> Bob opens the Marketing folder in the Laserfiche Client. The Client checks whether Bob has a column display attribute saved for that folder. Bob does not, because he has never configured columns in that folder. The Laserfiche Client then checks whether a column display attribute for that folder has been saved on the Everyone group. The Everyone group is configured to display the fields in the General template for that folder, so the Laserfiche Client displays those columns.
>
> Bob opens the Sales folder in the Laserfiche Client. The Client checks whether Bob has a column display attribute saved for that folder, which he does not. The Client then checks whether a column display attribute has been saved on the Everyone group for that folder. It has not. The Client therefore displays the default columns.
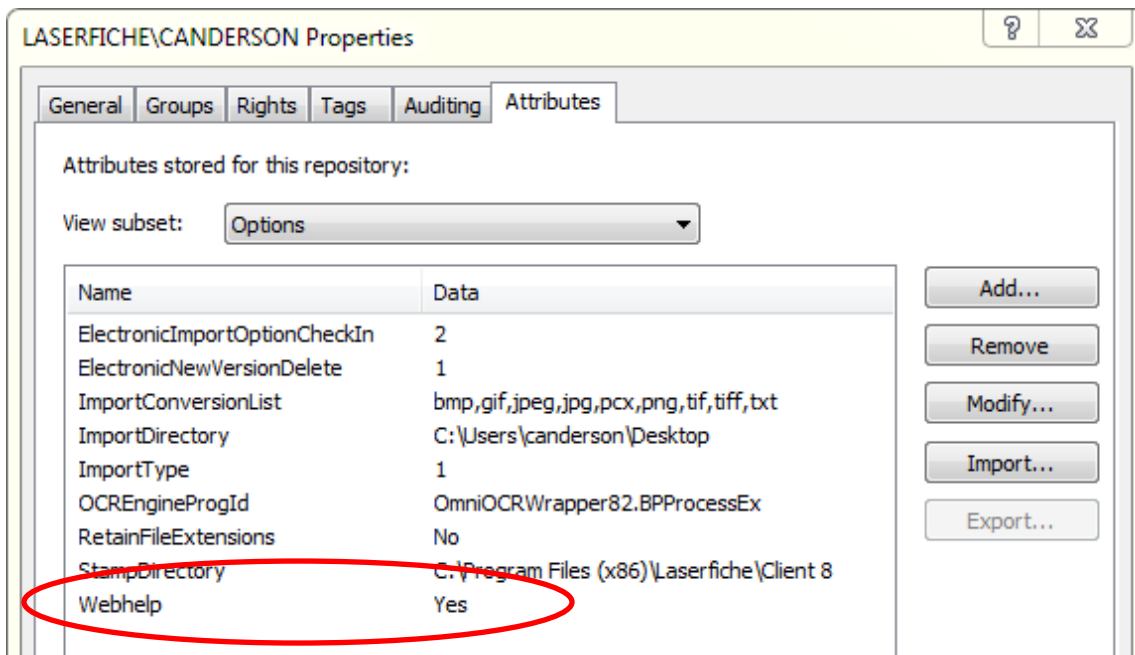
In most cases, trustee attributes will be checked in real time. This means that, if an attribute has been modified either within the client application or by an administrator through the Administration Console, it will immediately take effect in client applications. The user does not need to log out and log back in for the changes to be applied, although they may need to refresh the page or close and re-open a particular dialog.

Trustee attributes for a particular trustee can be found in the Administration Console, in the Attributes tab of the trustee's properties. Each trustee attribute consists of three parts: a category, a name, and a value. The category specifies what type of attribute it is, and enables filtering when viewing the attribute through the Administration Console. The name determines what the attribute controls, and the value specifies how the option is being configured.

For example, whether the Laserfiche Client will use online help or local help is determined by the [Options]Webhelp attribute. This setting can be configured in the Laserfiche Client, as seen in the screenshot below.

That choice is reflected in the trustee attribute for the user. In the screenshot below, the Options subset of the user's trustee attributes has been selected, filtering only for those attributes in the Options category. The [Options]Webhelp attribute, circled, has been set to Yes, indicating that online help will be used.

Note: Trustee attributes can also be set for Laserfiche and Windows groups, but attributes configured for those types of trustees will not be checked by Laserfiche client applications. They are intended for integrations only.

Administering Trustee Attributes

Most users will never interact directly with trustee attributes; trustee attributes will be created and modified for them behind the scenes, based on choices they make in Laserfiche client applications. However, administrative users with the **Manage Trustees** privilege can work more directly with trustee attributes. They can view user attributes for individual users, set attributes manually, or export attributes and then import them into other users' attributes. This allows administrators to quickly push out desired settings, standardize options in client applications, provide a new set of defaults for a repository, and make options such as saved searches or column profiles available to multiple users.

Viewing Trustee Attributes

Administrators can view trustee attributes, to see what settings users have configured and for troubleshooting purposes. Trustee attributes can be viewed in either the desktop Administration Console or the Web Administration Console. You can view the entire list of attributes for a user, or filter for a subset of the available attributes.

To view trustee attributes for a user or the Everyone group

1. Log in to the desktop Administration Console or the Web Administration Console as a user with the **Manage Trustees** privilege.

2. Expand your Laserfiche Server.

3. Expand your Laserfiche repository.

4. Under **Users and Groups** (in the desktop Administration Console) or **Accounts** (in the Web Administration Console), navigate to the Windows or Laserfiche user you whose attributes you want to view. (You can also select the Everyone group.)

5. Open the properties for the user:

    - In the desktop Administration Console, double-click the user name or the Everyone group to open its properties.

    - In the Web Administration Console, click the name of the user to open its properties. (The Everyone group properties will open automatically when the node is selected.)

6. Select the **Attributes** tab.

7. By default, the full list of attributes will be displayed. In the **Name** column, the category for each attribute will be listed in brackets, followed by the attribute's name. The **Data** column will display the value for the attribute.

8. To filter the list by category, open the dropdown next to **View subset** and select the category you want to view. The list will filter to display only the attributes in that category. When the list is filtered, the category will not be displayed at the beginning of the attribute name, but you can see which category is being shown by reviewing to the category selected under **View subset**.

Importing and Exporting Trustee Attributes

You can export attributes from one user and import them into another user's attributes. This allows you to share settings with other users, or to set them on the Everyone group so that they are available to all users.

When you import a set of attributes, any attributes that were not already set for the user will be added. You will be prompted to decide how to handle attributes that already exist in the user's properties. You can choose to replace the existing value with the imported value, retain the original value, return an error and stop import, or return an error and continue importing. This allows you to decide whether you want to override a user's existing settings, or simply supplement their settings with additional settings.

> **Example**: Sally, an administrator, wants the four members of the HR department to scan into the volume HRVOL and to use the template "Human Resources" for new documents. She configures her settings accordingly, then exports the attributes for default volume and default template. She then imports it into the user attributes for each of the four HR users, and chooses to override their existing settings. When those four users create new documents in the repository, those documents will now be created in the HRVOL volume, with the template "Human Resources," by default.

Importing a set of attributes to the Everyone group will effectively set a new default for the repository. This means that, if a user has not configured an option but that option has been set as an attribute for the Everyone group, the Everyone group's setting will be used. If the user has configured the option, the user's setting will be used. Importing attributes into the Everyone group will not override individual user settings.

> **Example**: By default, unless a user has customized their column display, Laserfiche displays the following columns: Name, Pages, Indexed, Creation Date, Last Modified, Volume, and Template Name. Sally wants to display default columns that are more tailored to her users, but she doesn't want to override any custom columns her users have set up. She configures columns displaying Last Modified, Template Name, Author field, and Extension, and exports that column display, then imports it into the Everyone group. Users who have configured custom column displays will

7

still see their own displays, but users who have not will now see the columns Sally selected by default, instead of the default Laserfiche columns.

Importing and exporting is particularly useful for sharing attributes such as saved searches and saved column profiles. Because saved searches and saved column profiles are stored as unique attributes, sharing them via import (whether into an individual user's attributes or into the Everyone group) will not replace the user's existing saved searches and column profiles, but will add them to the list so that they can be selected.

Example: Sally has created a saved search that she wants to copy to the Everyone group so that it will be available to everyone. She copies the attribute for that search from her own trustee attributes, then opens the Everyone group and pastes it into the attributes list. The saved search will now be available to all users accessing the repository. If they have already configured a saved search, their own search will remain available as well.

Attributes are exported as an XML file, which can be imported, saved, and distributed like any other file.

To export trustee attributes

1. Log in to the desktop Administration Console or the Web Administration Console as a user with the **Manage Trustees** privilege.

2. Expand your Laserfiche Server.

3. Expand your Laserfiche repository.

4. Under **Users and Groups** (in the desktop Administration Console) or **Accounts** (in the Web Administration Console), navigate to the Windows or Laserfiche user you whose attributes you want to export. (You can also select the Everyone group.)

5. Open the properties for the user:

   - In the desktop Administration Console, double-click the user name or the Everyone group to open its properties.

   - In the Web Administration Console, click the name of the user to open its properties. (The Everyone group properties will open automatically when the node is selected.)

6. Select the **Attributes** tab.

7. Locate the attribute or attributes you want to export. You can filter by opening the dropdown next to **View subset** and selecting the category you want to view.

8. Select one or more attributes. You can select multiple attributes by holding down CTRL and clicking on the attributes in the desktop

Admin Console, or by selecting the box next to each attribute you want to export in Web Admin.

9. Click the **Export** button. You will be prompted to save the attributes as an XML file on your computer.

Once you have exported a set of attributes as an XML file, you can import it into another user's attributes or into the Everyone group's attributes immediately, save it for import later, or keep it to import multiple times. You can also import it into another repository. However, note that repository-specific settings may not be recognized in the new repository. For instance, if you export a set of attributes that specify a default volume or template that does not exist in the destination repository, users will encounter an error when attempting to import documents until those settings are reconfigured to specify a valid volume or template.

To import trustee attributes

1. Log in to the desktop Administration Console or the Web Administration Console as a user with the **Manage Trustees** privilege.

2. Expand your Laserfiche Server.

3. Expand your Laserfiche repository.

4. Under **Users and Groups** (in the desktop Administration Console) or **Accounts** (in the Web Administration Console), navigate to the Windows or Laserfiche user you want to import attributes into. (You can also select the Everyone group.)

5. Open the properties for the user:

   - In the desktop Administration Console, double-click the user name or the Everyone group to open its properties.

   - In the Web Administration Console, click the name of the user to open its properties. (The Everyone group properties will open automatically when the node is selected.)

6. Select the **Attributes** tab.

7. Click the **Import** button. The **Select an Attribute File** dialog will open.

8. Navigate to the attribute XML file you want to import.

9. In the **Conflict Resolution** option, determine how you want to handle the import if one or more attributes in the file have already been configured for this user. Select one of the following:

   - **Replace with the imported value**: Select this option if you want to override the user's existing settings and replace them with the settings in the import attribute file.

- **Retain the original value**: Select this option if you want to leave existing attributes configured for the user unaltered. Only attributes not yet configured for the user will be added.

- **Return error and stop the process**: Select this option if you want to display an error and cancel the import if a conflict is found.

- **Return error and continue the process**: Select this option if you want to display an error but continue importing if a conflict is found.

10. Click **OK** to import the attributes.

> **Note**: In the desktop Administration Console, you can also copy attributes from one user to another without performing an export. This operation only works for attributes that have not yet been configured for the destination user; copy and paste cannot be used to override existing attributes. To copy and paste attributes, select the attributes you want to copy, right-click, and select **Copy**, then open the attributes tab for the user you want to paste them into, right-click, and select **Paste**. This operation is not available in the Web Administration Console.

Deleting Trustee Attributes

You can clear out one or more of a user's settings by deleting the relevant trustee attributes. For instance, if a user makes changes to their import conversion list, but is not happy with the changes they made, you can quickly return them to the default by deleting the relevant trustee attribute. You can also return all of a user's settings to the default by selecting all the user's attributes and deleting them.

If you want to back up an attribute before deleting it, you can do so by exporting the attribute before you delete it. To restore it, re-import the attribute.

To delete trustee attributes

1. Log in to the desktop Administration Console or the Web Administration Console as a user with the **Manage Trustees** privilege.

2. Expand your Laserfiche Server.

3. Expand your Laserfiche repository.

4. Under **Users and Groups** (in the desktop Administration Console) or **Accounts** (in the Web Administration Console), navigate to the Windows or Laserfiche user you whose attributes you want to delete. (You can also select the Everyone group.)

5. Open the properties for the user:

- In the desktop Administration Console, double-click the user name or the Everyone group to open its properties.

- In the Web Administration Console, click the name of the user to open its properties. (The Everyone group properties will open automatically when the node is selected.)

6. Select the **Attributes** tab.

7. Locate the attribute or attributes you want to delete. You can filter by opening the dropdown next to **View subset** and selecting the category you want to view.

8. Select one or more attributes to delete. You can select multiple attributes by holding down CTRL and clicking on the attributes in the desktop Admin Console, or by selecting the box next to each attribute you want to export in Web Admin.

9. Click the **Remove** button (in the desktop Admin Console) or the Delete button (in Web Admin).

Adding and Modifying Trustee Attributes

In addition to copying existing attributes from one user to another, you can add or modify attributes directly. This is useful for quickly changing simple attributes (such as changing Boolean attribute from Yes to No or vice versa), and for a few advanced or troubleshooting attributes that cannot be configured through client applications.

In general, we recommend making changes to attributes by changing settings in client applications, and then sharing those changes by exporting and importing the affected attributes. There are two reasons for this. First, some attributes, such as the document layout or column display attributes, are very long and complex, and may be difficult to create or modify by hand. Second, there is no error catching when modifying attributes. If you mistype or do not format an attribute correctly, your values will be saved, but when the client application tries to read them, it will fail and may produce an error for the user.
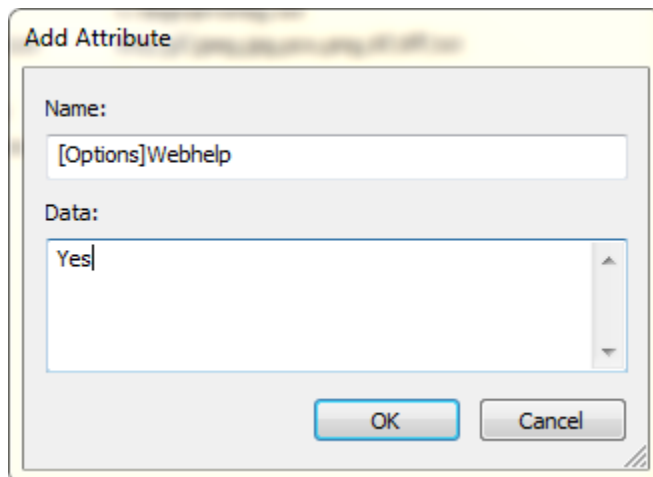
However, it is generally safe to make manual changes to simple attributes that contain data such as yes/no values or ID numbers.

Tip: If you set an attribute incorrectly, remember that you can always delete it. This will return the user to the default.

To add trustee attributes

1. Log in to the desktop Administration Console or the Web Administration Console as a user with the **Manage Trustees** privilege.

2. Expand your Laserfiche Server.

3. Expand your Laserfiche repository.

4. Under **Users and Groups** (in the desktop Administration Console) or **Accounts** (in the Web Administration Console), navigate to the Windows or Laserfiche user you whose attributes you want to delete. (You can also select the Everyone group.)

5. Open the properties for the user:

   - In the desktop Administration Console, double-click the user name or the Everyone group to open its properties.

   - In the Web Administration Console, click the name of the user to open its properties. (The Everyone group properties will open automatically when the node is selected.)

6. Select the **Attributes** tab.

7. Click the **Add** button.

8. In the **Name** option, type the name of the attribute you want to add, prefaced by the category. (Example: "[Options]Webhelp")

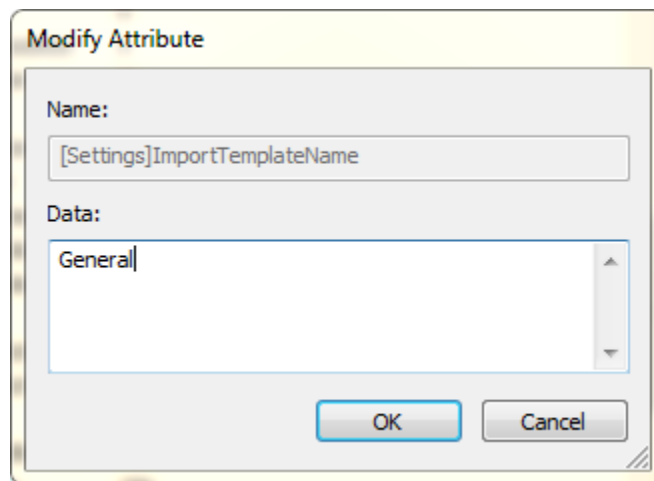9. In the **Data** option, type the value for the attribute.

10. Click **OK**.

To modify trustee attributes

1. Log in to the desktop Administration Console or the Web Administration Console as a user with the **Manage Trustees** privilege.

2. Expand your Laserfiche Server.

3. Expand your Laserfiche repository.

4. Under **Users and Groups** (in the desktop Administration Console) or **Accounts** (in the Web Administration Console), navigate to the Windows or Laserfiche user you whose attributes you want to delete. (You can also select the Everyone group.)

5. Open the properties for the user:

- In the desktop Administration Console, double-click the user name or the Everyone group to open its properties.

- In the Web Administration Console, click the name of the user to open its properties. (The Everyone group properties will open automatically when the node is selected.)

6. Select the **Attributes** tab.

7. Locate the attribute you want to modify. You can filter by opening the dropdown next to **View subset** and selecting the category you want to view. Only one attribute may be modified at a time.

8. In the desktop Admin Console, click the **Modify** button. In Web Admin, click the name of the attribute you want to modify. The **Modify Attribute** dialog will open.

9. In the **Data** option, type the new value for the attribute.

10. Click **OK**.
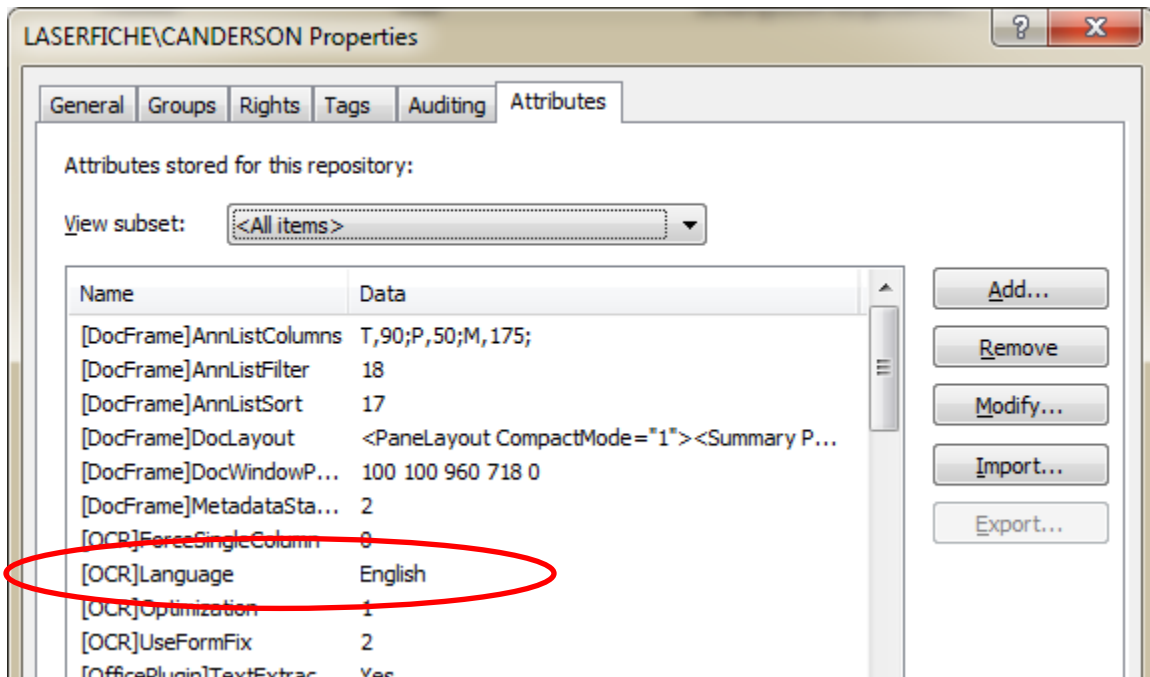
List of Selected Trustee Attributes

The following section provides syntax and usage information for a selection of commonly-used trustee attributes. Attribute information is provided for the following topics: online help, column display, saved column profiles, saved searches, document viewer layout, document import, and OCR and text extraction.

Each trustee attribute will contain the following information:

- **Category**: The category under which the attribute is stored. When an attribute is named using category and name syntax (such as [Options]Webhelp), the category is the portion of the attribute contained in square brackets. (In this example, the category is Options.) You can also filter the attribute list by category.

- **Name**: The name of the attribute. When an attribute is named using category and name syntax (such as `[Options]Webhelp`), the category is the portion of the attribute listed after the square brackets. (In this example, the name is `Webhelp`.) Each attribute name must be unique within its category, but there may be another attribute with the same name in a different category.

- **Valid Values**: The values that the attribute recognizes as valid, and what each one does. This section will also list the default value, if any.

- **Use**: The purpose of the attribute, and the client behavior it controls.

- **Notes**: Any additional information or further considerations pertaining to the attribute. If the attribute can be set in the user interface, the location of that setting is listed here as well.

In the example circled below, `[OCR]` is the category for the attribute, `Language` is the name, and `English` is one of the valid values.

Note: No error checking is performed when inputting or modifying trustee attributes. This means that a typo or miswording in the category, name or value will result in an attribute that cannot be accurately read by the client application. This may result in the client application ignoring the attribute, or in an error, depending on the exact nature of the misconfiguration. It is therefore important to carefully note the exact syntax and valid set of values for the attributes you want to configure manually.

Online Help

Two attributes control the way a user accesses help: the `[Options]Webhelp` attribute and the `[Options]CheckForInternet` attribute. The `[Options]Webhelp` attribute determines whether online help or local help will be used, and `[Options]CheckForInternet` determines whether the client application should check for an Internet connection before using `[Options]WebHelp`.

Syntax: Webhelp

- **Category**: `Options`
- **Name**: `Webhelp`
- **Valid Values**:
  - `Yes`
    - The user will use online help.
  - `No`
    - The user will use local help.
- **Use**: Determines whether the user will use online or local help when opening documentation.
- **Notes**: If this attribute is not set, the user will be prompted to select online or local help. This attribute can also be set in the **Help** section of the **Options** dialog in the Laserfiche Client.

Syntax: CheckForInternet

- **Category**: `Options`
- **Name**: `CheckForInternet`
- **Valid Values**:
  - `Yes`
    - Client applications will check for an Internet connection, and if one is found, online help will be used. Otherwise, local help will be used.
  - `No`
    - No check will be performed.
    - If the attribute is not set, this value will be used as default.
- **Use**: Determines whether the client application will check for an Internet connection to determine whether to use online or local help.

15

- **Notes**: This attribute can also be set in the **Help** section of the **Options** dialog in the Laserfiche Client.

Column Display

Column displays can be configured in several ways, each of which is reflected in the trustee attributes.

First, users can determine whether they want to display the same columns for all folders, or remember changes to each folder's columns separately. This is controlled by the `[Settings]UniqueFolderColumns` attribute.

If the user has chosen to display the same columns for all folders in the folder tree, the column display will be stored in the `[Settings]ColumnDisplay` attribute. If the user has chosen to display different columns for different folders, each folder will be represented with a separate attribute of the format `[Settings]ColumnDisplay`*`EntryID`*, where *`EntryID`* is the entry ID of the specific folder. For example, the column display for the folder with entry ID 455 would be ColumnDisplay455. Two special folders have their own column display attributes, which will be used regardless of whether column displays are unique for different folders: `[Settings]ColumnDisplaySearch`, which controls the columns that will be displayed in the search results, and `[Settings]ColumnDisplayRecycleBin`, which controls the columns that will be displayed in the recycle bin. If the general `[Settings]ColumnDisplay` attribute was set before the user chose to save changes to different folders independently, its value will be used as the default for new folders when they are opened, but any changes made to them will be saved.

Manually modifying the values of the `[Settings]ColumnDisplay` attributes is not recommended. However, you can use attribute copying, import, and export to share column displays between users or set them on the Everyone group. If you wish to copy the column display from one folder to another, you can do so by copying the attribute and modifying the entry ID number of the attribute name. For instance, to copy the column display for the folder with entry ID 899 to the folder with entry ID 400, you would copy the value of `[Settings]ColumnDisplay899` and paste it into the value of `[Settings]ColumDisplay400`.

Syntax: UniqueFolderColumns

- **Category**: `Settings`
- **Name**: `UniqueFolderColumns`
- **Valid Values**:
    - `Yes`

16

- - Changes made to the column display for each folder will be saved for that folder only. Each folder can have its own unique column display.
  - o No
    - Changes made to the column display for a folder will be applied to all folders in the folder tree. (The recycle bin and search panes are excluded.)
    - If the attribute is not set, this value will be used as default.
- **Use**: Determines whether changes to the column display will be saved on a per-folder basis, or will be applied to every folder in the folder tree.
- **Notes**: This attribute can also be set in the **Browser** section of the **Options** dialog in the Laserfiche Client or Web Access.

Syntax: ColumnDisplay

- **Category**: `Settings`
- **Name**: `ColumnDisplay`
- **Valid Values**:
  - o Manually altering the data for the `[Settings]ColumnDisplay` attribute is not recommended. We recommend configuring the desired column display in the Client or Web Access, and then exporting and importing it to share it between users.
- **Use**: Determines what columns will be displayed for folders in the folder tree, if `[Settings]UniqueFolderColumns` is set to No or has not been set. If `[Settings]UniqueFolderColumns` has been set to Yes, determines what the starting columns will be for newly-opened folders.
- **Notes**: If `[Settings]UniqueFolderColumns` has been set to `No`, you can configure this attribute in the Client or Web Access, either by right-clicking the column header bar, or in the **Browser** section of the **Options** dialog. If `[Settings]UniqueFolderColumns` has been set to `Yes,` configuring columns in the Client or Web Access will instead set the `[Settings] ColumnDisplayEntryID` attribute.

Syntax: ColumnDisplay*EntryID*

- **Category**: `Settings`
- **Name**: `ColumnDisplayEntryID`
  - o *EntryID* represents the entry ID number for the folder whose column display this attribute controls. For instance, the column

display for the folder with entry ID 123 is stored in the attribute `ColumnDisplay123`. The entry ID for a folder can be found in the folder's properties.

- **Valid Values**:

    o Manually altering the data for the `[Settings]ColumnDisplay`*`EntryID`* attribute is not recommended. We recommend configuring the desired column display in the Client or Web Access, and then exporting and importing it to share it between users.

- **Use**: Determines what columns will be displayed for the folder with the specified entry ID, if `[Settings]UniqueFolderColumns` has been set to Yes.

- **Notes**: The `[Settings]ColumnDisplay`*`EntryID`* attribute will only be used if the `[Settings]UniqueFolderColumns` attribute has been set to `Yes`; if it has been set to `No`, or if it has not been set, only the `[Settings]ColumnDisplay` attribute will be used. The `[Settings]ColumnDisplay`*`EntryID`* attribute for each folder is created when the user opens the folder for the first time, but you may pre-create these attributes. The column display can be set in the Client or Web Access, either by right-clicking the column header bar, or in the **Browser** section of the **Options** dialog.

Syntax: ColumnDisplayRecycleBin

- **Category**: `Settings`

- **Name**: `ColumnDisplayRecycleBin`

- **Valid Values**:

    o Manually altering the data for the `[Settings]ColumnDisplayRecycleBin` attribute is not recommended. We recommend configuring the desired column display in the Client or Web Access, and then exporting and importing it to share it between users.

- **Use**: Determines what columns will be displayed for the recycle bin folder.

- **Notes**: The column display can be set in the Client or Web Access, by right-clicking the column header bar.

Syntax: ColumnDisplaySearch

- **Category**: `Settings`

- **Name**: `ColumnDisplaySearch`

- **Valid Values**:

- o Manually altering the data for the `[Settings]ColumnDisplaySearch` attribute is not recommended. We recommend configuring the desired column display in the Client or Web Access, and then exporting and importing it to share it between users.
- **Use**: Determines what columns will be displayed for the search results folder.
- **Notes**: The column display can be set in the Client or Web Access, either by right-clicking the column header bar, or in the **Search** section of the **Options** dialog.

Syntax: AddTemplateColumns

- **Category**: `Options`
- **Name**: `AddTemplateColumns`
- **Valid Values**:
  - o `Yes`
    - ▪ When the user performs a template search, the fields for the template specified in the search will be appended to the column display after the standard search pane columns (as specified in `[Settings]ColumnDisplaySearch`).
    - ▪ If the attribute is not set, this value will be used as default.
  - o `No`
    - ▪ When the user performs a template search, only the standard search pane columns will be displayed (as specified in `[Settings]ColumnDisplaySearch`).
- **Use**: Determines whether to display field information for a template when performing a search for that template.
- **Notes**: This setting has no effect on searches other than template search.

Saved Column Profiles

Laserfiche 8.3 supports the ability to save a column display as a profile, which can later be quickly applied to a folder. Saved column profiles are a good way to apply the same column display to multiple folders or to switch between multiple column displays in the same folder. Since they are saved as trustee attributes, they are also a good way to share column displays with other users.

Each saved column profile is stored as a separate attribute in the `ColumnProfile` category, with its attribute name matching the name of the

profile. Unlike the `ColumnDisplay` attributes, pasting or importing a saved column profile will not replace an existing column display. It will simply make that column display available for use.

Syntax: ColumnProfile

- **Category**: `ColumnProfile`

- **Name**: *ProfileName*

  - *ProfileName* represents the name the column profile was saved as by the user who created it.

- **Valid Values**:

  - Manually altering the data for the `[ColumnProfile]` attributes is not recommended. We recommend configuring the desired saved column profile in the Client, and then exporting and importing it to share it between users.

- **Use**: Adds a column profile with the specified name and layout to the user's list of saved column profiles.

- **Notes**: A user may have multiple column profiles saved; as long as they do not have the same name, they will not conflict, and all will be available to select. The column display can be set in the Laserfiche Client by configuring the column display, then right-clicking the column header and selecting **Load/Save Columns**.

Saved Searches

As of Laserfiche 8.3, saved searches are stored in a user's attributes. Each saved search is stored as a separate attribute in the `[SavedSearch]` category, with its attribute name matching the name the search was saved under.

Syntax: SavedSearch

- **Category**: `SavedSearch`

- **Name**: *SearchName*

  - *SearchName* represents the name the search was saved as by the user who created it.

- **Valid Values**:

  - Manually altering the data for the `[SavedSearch]` attributes is not recommended. We recommend configuring the desired saved search in the Client or Web Access, and then exporting and importing it to share it between users.

- **Use**: Adds a saved search with the specified name and contents to the user's list of saved searches profiles.

- **Notes**: A user may have multiple saved searches; as long as they do not have the same name, they will not conflict, and all will be available to select. Saved searches can be created and managed in the Laserfiche Client and Web Access, in the Search pane.

Document Viewer Layout

When users open documents in the document viewer, the document information is displayed in a collection of panes: images, text, metadata, thumbnails, annotations, and electronic file. Users can configure which panes to view and what size and layout to display them in. These settings are stored in the DocLayout attribute (for imaged documents and most electronic documents) or the DocLayoutPDF attribute (for PDF electronic documents).

Syntax: DocLayout

- **Category**: `Settings`

- **Name**: `DocLayout`

- **Valid Values**:

  - o Manually altering the data for the `[Settings]DocLayout` attribute is not recommended. We recommend configuring the desired pane layout in the Client or Web Access, and then exporting and importing it to share it between users.

- **Use**: Configures the layout of panes in the document viewer, including which panes are visible, their sizes, and their locations in the window.

- **Notes**: The `[Settings]DocLayout` attribute does not apply to PDF electronic documents, whose layout is controlled by the `[Settings]DocLayoutPDF` attribute, below. The `[Settings]DocLayout` attribute also exists under the `[DocFrame]` category, but the `Settings` attribute will be checked first and is the one that should be exported, imported, and modified. The layout of the document viewer can be configured within the document viewer, by displaying or hiding panes in the **View** menu and dragging and dropping to move or resize them.

Syntax: DocLayoutPDF

- **Category**: `Settings`

- **Name**: `DocLayoutPDF`

- **Valid Values**:

  - o Manually altering the data for the `[Settings]DocLayoutPDF` attribute is not recommended. We recommend configuring the desired pane layout in the Client or Web Access, and then exporting and importing it to share it between users.

- **Use**: Configures the layout of panes in the document viewer for PDF electronic documents, including which panes are visible, their sizes, and their locations in the window.

- **Notes**: The `[Settings]DocLayoutPDF` attribute also exists under the `DocFrame` category, but the `Settings` attribute will be checked first and is the one that should be exported, imported, and modified. The layout of the document viewer can be configured within the document viewer, by displaying or hiding panes in the **View** menu and dragging and dropping to move or resize them.

Document Import

Settings for new and imported documents are stored in various trustee attributes. You can modify or export and import these settings to standardize document import. For example, you might use trustee attributes to specify a particular import volume and template as the default for all users.

Syntax: ImportVolume

- **Category**: `Settings`

- **Name**: `ImportVolume`

- **Valid Values**:

  o `-1`

    ▪ The parent folder's volume will be used by default when importing documents.

  o *`VolumeID`*

    ▪ *`VolumeID`* represents the numeric volume ID for the default import volume.

    ▪ The volume ID for a volume can be found by opening the volume's properties in the desktop Administration Console or Laserfiche Web Admin.

    ▪ **Example**: If the volume HRVOL has an ID of 455, a value of 455 would cause the user to import into the HRVOL volume by default.

    ▪ If no volume exists for a specified ID, the user will receive an error when they attempt to import, and must choose another volume.

- **Use**: Determines which volume, by ID number, will be used to store new or imported documents by default.

- **Notes**: This attribute can also be set in the **New Document** section of the **Options** dialog.

Syntax: ImportTemplateName

- **Category**: `Settings`

- **Name**: `ImportTemplateName`

- **Valid Values**:

  - `<Use parent folder's template>`

    - The parent folder's volume will be used by default when importing documents.

  - *TemplateName*

    - *TemplateName* represents the name of the template to be assigned to new documents by default.

    - **Example**: To assign the template "Human Resources" to new documents by default, use the value `Human Resources`.

  - If the attribute is not set, there will be no default template. Unless a template is selected during document creation or import, documents will be created without a template.

- **Use**: Determines which template will be assigned to new or imported documents by default.

- **Notes**: This attribute can also be set in the **New Document** section of the **Options** dialog.

Syntax: NewFolderTemplateName

- **Category**: `Settings`

- **Name**: `NewFolderTemplateName`

- **Valid Values**:

  - *TemplateName*

    - *TemplateName* represents the name of the template to be assigned to new folders by default.

    - **Example**: To assign the template "Human Resources" to new folders by default, use the value `Human Resources`.

  - If the attribute is not set, there will be no default template, and folders will be created by default without a template.

- **Use**: Determines which template will be assigned to new folders by default.

Syntax: ImportConversionList

- **Category**: `Options`

23

- **Name**: `ImportConversionList`
- **Valid Values**:
  - List the extensions for image file types that you want to be automatically converted to TIFF image pages when imported, separated by commas and without spaces.
  - The following extensions are valid and represent file types that can be automatically converted: tif, tiff, bmp, pcx, jpg, jpeg, txt, gif, png and ico.
  - **Example**: The value `tif,tiff,bmp,pcx,txt,gif,png,ico` would cause tif/tiff images, bitmaps, pcx images, text files, gif images, png images, and ico files to be automatically converted to Laserfiche TIFF image pages upon import. Because jpg and jpeg were left off the list, images in that format would not be converted, and would be imported as electronic documents.
  - Adding unsupported file types to the list may result in error messages or bad or missing data, and is not recommended. For example, adding the extension docx to the list and then importing a Word .docx file would result in an imported document full of gibberish text.
  - The default value for this attribute is `tif,tiff,bmp,pcx,jpg,jpeg,txt,gif,png`
- **Use**: Determines which file types to convert to Laserfiche TIFF image pages during import.
- **Notes**: This attribute can also be set in the **New Document** section of the **Options** dialog.

Syntax: RetainFileExtensions

- **Category**: `Options`
- **Name**: `RetainFileExtensions`
- **Valid Values**:
  - `Yes`
    - When electronic documents are imported, extensions will be retained in the file name.
  - `No`
    - When electronic documents are imported, extensions will not be retained in the file name.
    - If the attribute is not set, this value will be used by default.

- **Use**: Determines whether electronic document extensions will be retained in the file name when the documents are imported.

- **Notes**: This attribute can also be set in the **New Document** section of the **Options** dialog.

Syntax: ImportNameConflictOption

- **Category**: `Settings`

- **Name**: `ImportNameConflictOption`

- **Valid Values**:

  o 0

    ▪ If a document is imported that has the same name as an existing document in the same folder, and the existing document is not under version control, Laserfiche will ask the user how the name conflict should be handled.

    ▪ If the attribute is not set, this value will be used by default.

  o 1

    ▪ If a document is imported that has the same name as an existing document in the same folder, and the existing document is not under version control, Laserfiche will automatically rename the new document by appending a number in parentheses.

  o 2

    ▪ If a document is imported that has the same name as an existing document in the same folder, and the existing document is not under version control, Laserfiche will place the existing document under version control and add the new document to its version history as the latest version.

  o 3

    ▪ If a document is imported that has the same name as an existing document in the same folder, and the existing document is not under version control, Laserfiche will overwrite the existing document with the new document.

- **Use**: Determines how name conflicts are handled when the existing document is not under version control.

- **Notes**: This attribute can also be set in the **New Document** section of the **Options** dialog.

Syntax: ImportNameConflictVersionControlOption

- **Category**: `Settings`
- **Name**: `ImportNameConflictVersionControlOption`
- **Valid Values**:
  - `0`
    - If a document is imported that has the same name as an existing document in the same folder, and the existing document is version control, Laserfiche will ask the user how the name conflict should be handled.
    - If the attribute is not set, this value will be used by default.
  - `1`
    - If a document is imported that has the same name as an existing document in the same folder, and the existing document is under version control, Laserfiche will automatically rename the new document by appending a number in parentheses.
  - `2`
    - If a document is imported that has the same name as an existing document in the same folder, and the existing document is under version control, Laserfiche will place the existing document under version control and add the new document to its version history as the latest version.
- **Use**: Determines how name conflicts are handled when the existing document is under version control.
- **Notes**: This attribute can also be set in the **New Document** section of the **Options** dialog.

OCR and Text Extraction

OCR and text extraction settings, which are configured in the Options menu, are stored in various trustee attributes. You can modify or export and import these settings to standardize text generation. For example, you might choose to specify the optimization priority "Balance" in the `[OCR]Optimization` attribute for scanner operator users, to ensure that their OCR process does not take too long.

Syntax: OCR

- **Category**: `Settings`
- **Name**: `OCR`

- **Valid Values**:

  - `0`

    - New documents will not be OCRed by default.

  - `1`

    - New documents will be OCRed by default.

    - If the attribute is not set, this value will be used by default.

- **Use**: Determines whether new documents will be OCRed when they are created or added to the repository.

- **Notes**: This attribute can also be set in the **New Documents** section of the **Options** dialog.

Syntax: OCRConflict

- **Category**: `Settings`

- **Name**: `OCRConflict`

- **Valid Values**:

  - `0`

    - When the text extraction process encounters electronic documents with existing image pages, text will be extracted from the electronic documents and the image pages will be deleted.

  - `1`

    - When the text extraction process encounters electronic documents with existing image pages, the existing image pages will be OCRed.

  - `2`

    - When the text extraction process encounters electronic documents with existing image pages, the documents will be skipped without additional processing.

    - If the attribute is not set, this value will be used by default.

- **Use**: Determines how to handle text extraction for electronic documents that contain image pages. You can choose whether to OCR the image pages (which will result in text that matches the pagination, but that does not necessarily exactly match the text stream), or to extract text from the document's text stream (which will give the most accurate results, but will not match the page and line breaks of the images), or to ignore these documents.

Syntax: ForceSingleColumn

- **Category**: OCR

- **Name**: ForceSingleColumn

- **Valid Values**:

  - 0

    - If the original text is in columns, decolumnize the text and store as a single continuous block.

    - If the attribute is not set, this value will be used by default.

  - 1

    - Maintain the columns in the original text (do not decolumnize).

- **Use**: Determines how to handle text in columns during OCR.

- **Notes**: This attribute can also be set in the **Generate Text** section of the **Options** dialog.

Syntax: Language

- **Category**: OCR

- **Name**: Language

- **Valid Values**:

  - Any language that is valid for the OCR engine may be specified. You can view a complete list of languages valid for your OCR engine in the Generate Text section of the Options dialog.

  - If the attribute is not set, the value English will be used.

  - **Example**: The value French would indicate that the OCR engine should use the French language for OCR.

- **Use**: Determines the language the OCR engine will use.

- **Notes**: This attribute can also be set in the **Generate Text** section of the **Options** dialog.

Syntax: Optimization

- **Category**: OCR

- **Name**: Optimization

- **Valid Values**:

  - 0

    - OCR will be optimized for speed.

- o 1
  - OCR will be optimized in a balance between speed and accuracy.
  - If the attribute is not set, this value will be used by default.
- o 2
  - OCR will be optimized for accuracy.
  - Note that this setting is recommended only if you are not getting sufficiently accurate results with the `Balanced` option, as it can significantly slow OCR processing.

- **Use**: Determines the speed vs. accuracy prioritization of the OCR engine.

- **Notes**: This attribute can also be set in the **Generate Text** section of the **Options** dialog.

Syntax: TextExtraction

- **Category**: `OfficePlugin`

- **Name**: `TextExtraction`

- **Valid Values**:

  - o Yes
    - Text will automatically be extracted from documents when they are saved with the Laserfiche Office Integration.
    - If the attribute is not set, this value will be used by default.

  - o No
    - Text will not be automatically extracted from documents when they are saved to Laserfiche using the Laserfiche Office Integration.

- **Use**: Determines whether documents saved to Laserfiche using the Laserfiche Office Integration.

- **Notes**: This attribute can also be set in the **Generate Text** section of the **Options** dialog.

Laserfiche®

Trustee Attributes
February 2012

Author: Connie Anderson
Editor: Justin Pava, Misty Kalousek
Technical Editor: Robert Strickland

Description:
 Trustee attributes are the settings specific to a particular user that influence the way they use the Laserfiche Client or Web Access. This paper explains what trustee attributes are and how administrators can work with them, and provides a reference for the following commonly-used attribute types: online help, column display, saved column profiles, saved searches, document viewer layout, document import, and OCR and text extraction.

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

Phone: +1.562.988.1688
www.laserfiche.com