Laserfiche 8

Plus Quick Start

Laserfiche®

Welcome to Laserfiche Plus

Laserfiche Plus is an application that allows you to create a read-only copy of documents and folders in your Laserfiche repository that can be distributed outside your organization or used for backup purposes. You can choose exactly what files you want to include in your published repository, and how you want those files to be displayed. The published repository can be burned to CD or DVD, or stored on a flash drive, and then launched directly from the CD, DVD, or flash drive, even on computers that do not have any Laserfiche software installed. Users will be able to browse the files using the Viewer, a version of the Laserfiche Client that will allow them to open, view, print and export the files in the distributed repository, but not add to or modify them.

How Laserfiche Plus Works

Plus publishing begins in your source repository, the main Laserfiche repository in which the documents and folders you want to publish are stored. You begin publishing by launching the Plus Wizard, which will walk you through the steps of choosing which documents to include in your final published repository, and how to publish them. When you have completed this wizard, the Plus publishing process will start. Plus exports the files you selected to a temporary folder on your computer, and then creates the read-only Viewer. Finally, the whole published package—repository and Viewer files—is stored to the destination you chose during publishing.

By launching the published repository, users can browse through published folders and view published documents, read the field information, annotations and other data contained in the documents, and print or export the documents. They cannot make any modifications, however.

Getting Started

You can publish with Plus from any computer on which both Laserfiche Plus and the Laserfiche Client have been installed.

Note: Some information, including security and records management-specific settings, is not included in the published repository.

1. Open the Laserfiche Client and log in as a user with the **Export** feature right, **Browse** and **Read** entry access rights, and all relevant security tags for all entries you wish to publish.

2. Select the documents you want to publish. You can publish in one of three different ways: by volume (which will publish all the entries contained in a particular volume or set of volumes), by entry (which will publish the documents and folders you select), or by searching for a set of documents. Depending on which type you wish to publish, choose one of the following:

    a. To publish by volume, select any folder in the repository. Volume publishing can be launched from anywhere in the repository.

    b. To publish by entry, select one or more folders and/or documents that you want to publish.

    c. To publish a set of search results, create and run a search that includes the entries you want to include in the published repository.

    Tip: If you are publishing by folder, and you want to include a document in a different folder, you don't need to move the document to the folder to publish it. Instead, you can create a shortcut to the document within the folder. The shortcut will be replaced with a copy of the actual document when the folder is published.
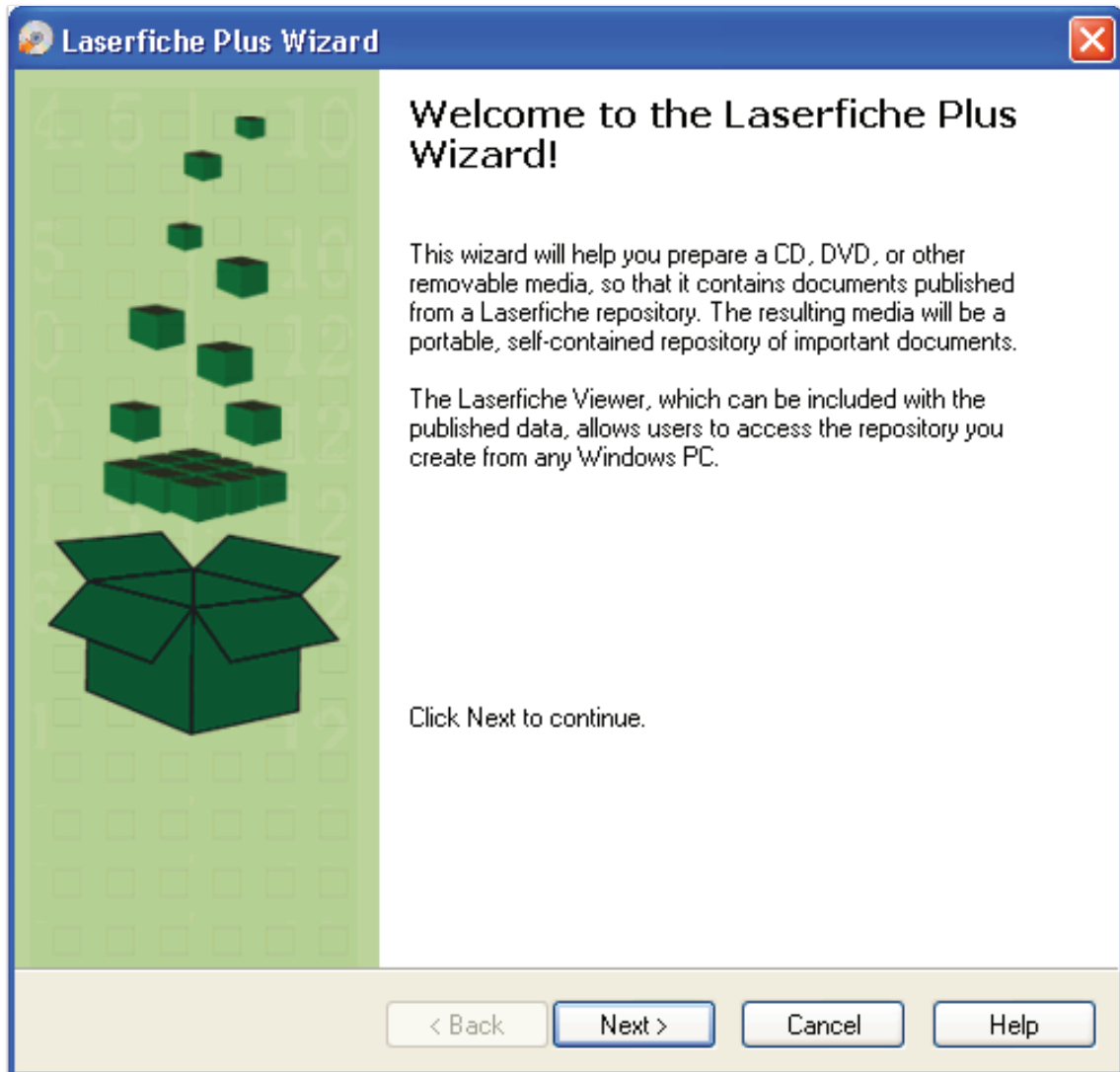
3. Open the Tools menu and select **Publish**, or click the **Publish** toolbar button.

     This will launch the Laserfiche Plus Wizard.

Plus Wizard: Welcome and License Agreement

1. The Laserfiche Plus wizard will appear and will display the **Welcome** step. Click **Next** to continue.

2. The first time you publish on a particular computer, the Laserfiche Plus wizard will display the **License Agreement** step. Click **Yes** to accept the license agreement. This step will not be displayed to you again on this computer.

Plus Wizard: Laserfiche Exporting Options

The **Laserfiche Exporting Options** step allows you to select the publishing method you want to use. You can publish by volume, by folder, or by search results. You will also determine how Plus will handle annotations on published documents in this step.
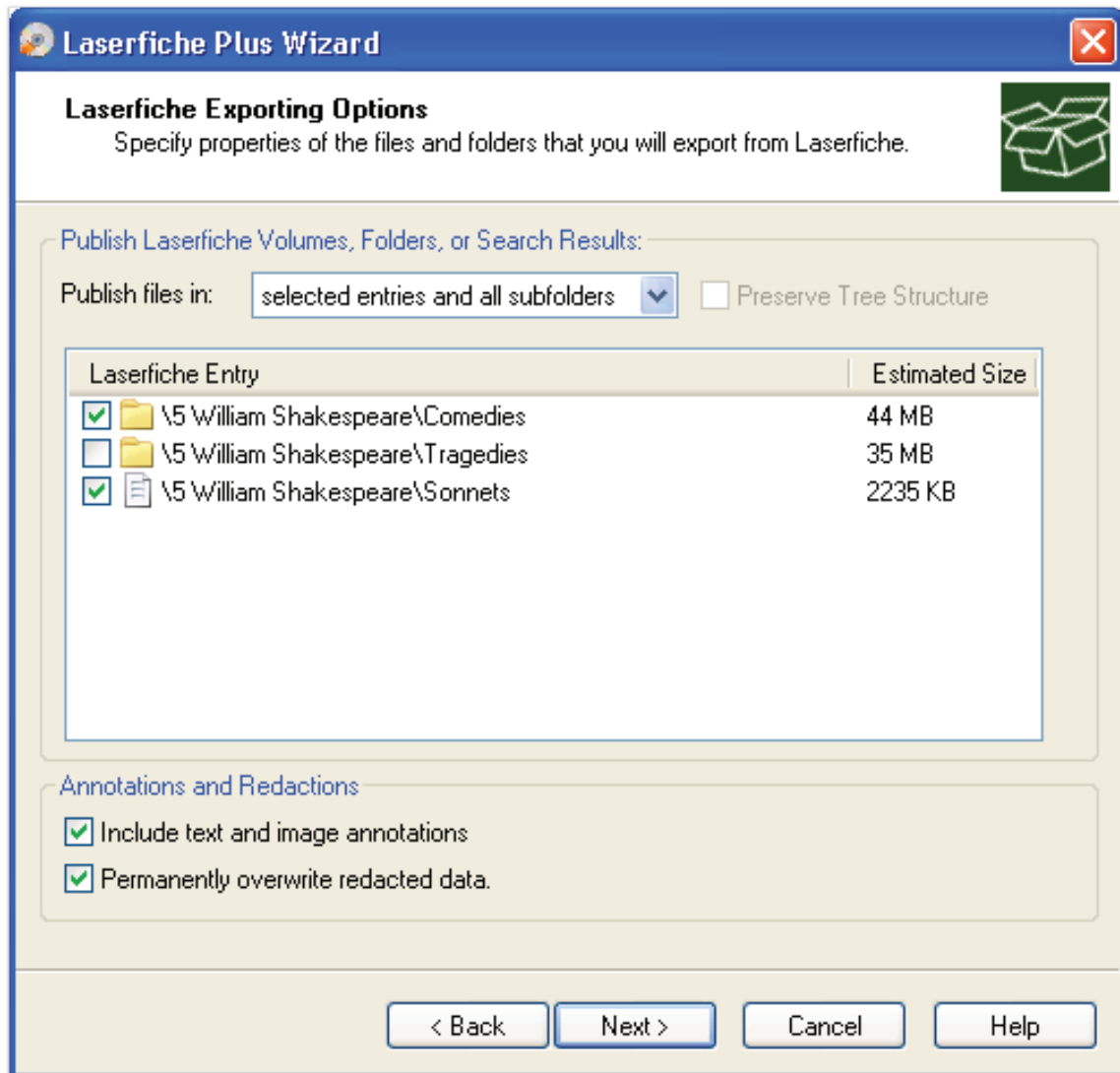
1. Choose one of the following, depending on the way you want to publish your documents:

   a. To publish the contents of one or more volumes, choose **the following volumes**. This will display the volumes for your repository. Select each volume that should be included in the published repository.

   b. To publish by entries and include subfolders and their contents, select **selected entries and all subfolders**. Clear any entries you do not want to include in the published repository. This will publish the contents of the folders, their subfolders, the contents of the subfolders, and so on.

c. To publish by entries without including subfolders and their contents, select **only selected entries**. Clear any entries you do not want to include in the published repository. Immediate children of the selected folders will be published, but subfolders and their contents will not.

d. To publish a set of search results, select **search results**. If you select this option, you can choose **Preserve Tree Structure** to organize the search results into their original folders, or clear **Preserve Tree Structure** to publish the search results as a list, as in the Search Results Pane.

2. In the **Estimated Size** column, you can view the estimated size required for this volume, folder, or set of search results.

3. To include annotations in the published repository, select **Include text and image annotations**. If you do not want to include annotations, clear this option.

    Note: If the user who is publishing does not have the rights to see through a particular redaction, that redaction will be included and will be permanently obscured, regardless of these settings. This prevents a user from publishing in order to circumvent security.

4. To permanently overwrite redacted data in the repository, select **Permanently overwrite redacted data**. This will burn redactions into the TIFF images and remove redacted information from the text files to ensure that redacted information is secure. If you do not want to make redactions permanent, clear this option.

5. Click **Next**.

    Note: If you do not have the Microsoft Image Mastering API 2.0 component (IMAPIv2.0) installed, you may be prompted to download and install it. IMAPIv2.0 is necessary for publishing to a CD or DVD directly and for writing an ISO file. If you are publishing to a temporary staging directory, you will be able to do so without this component.

Plus Wizard: Published Repository Destination

In the **Select a Destination for the Published Repository** step, you will specify how and where Plus will store the published repository. You can choose to burn directly to disc, create an ISO file for batch burning, or publish to a folder on your hard drive.
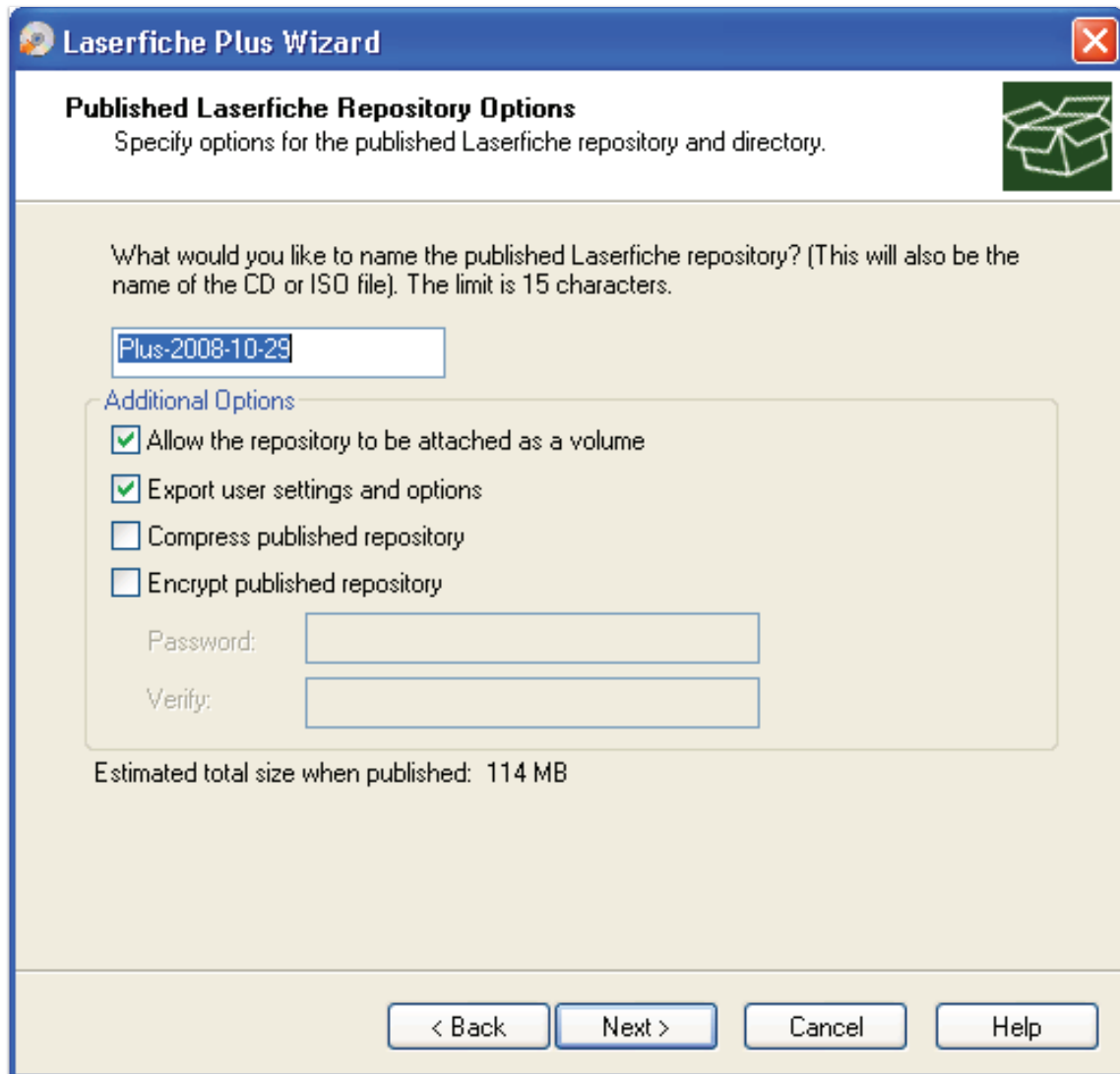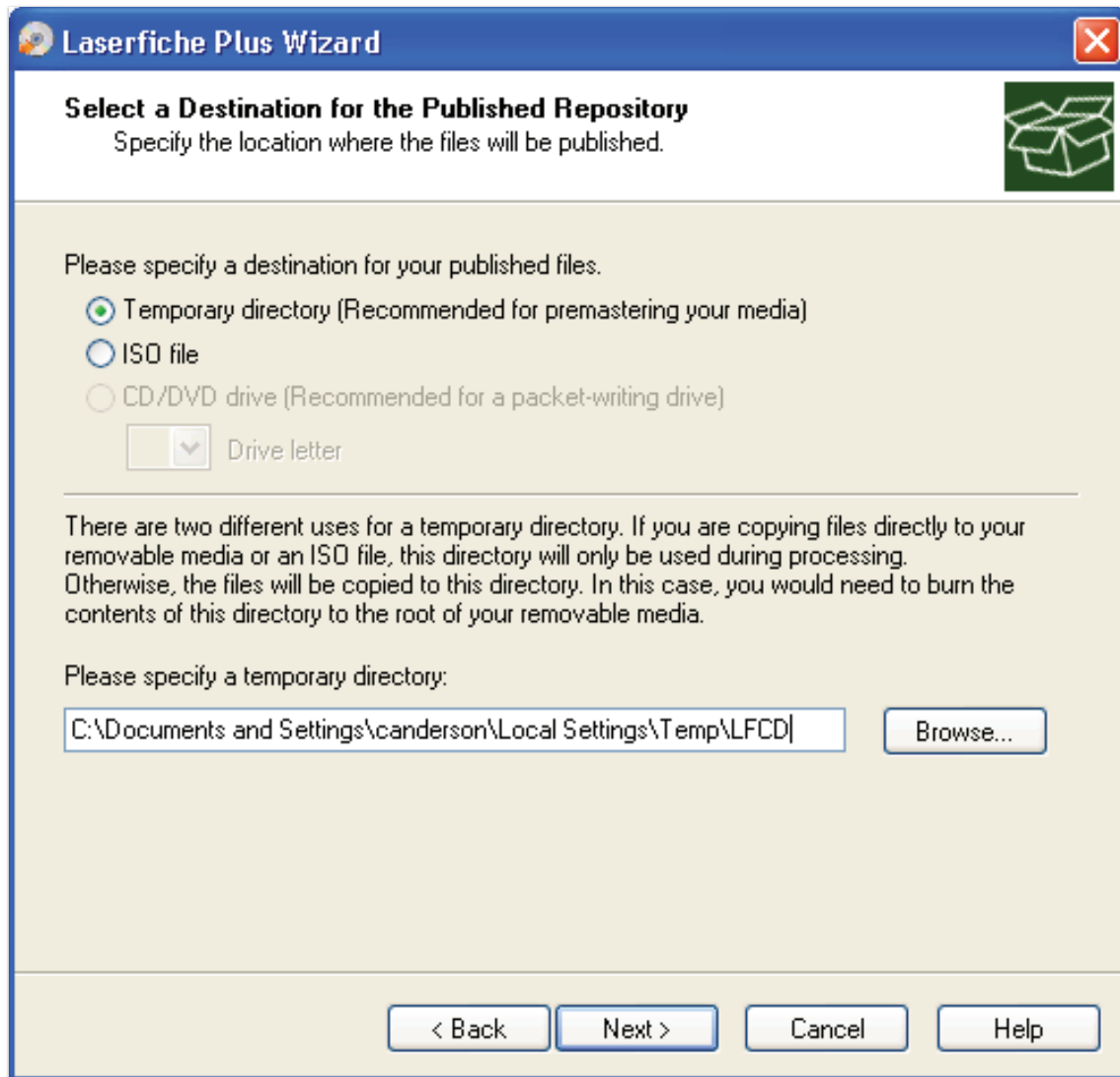

1. Chose one of the following options, depending on how you want to publish your selected documents and folders:

    a. To publish to a temporary directory, select **Temporary directory**. This will store the published repository and its Viewer in the directory you choose.

b. To publish your repository as an ISO file, which can later be used to burn CDs or DVDs, select **ISO file**. This option creates a CD or DVD image without burning it to an actual disc, which allows you to burn multiple copies of the disc from one file, or distribute the file so that users can burn their own copies.

c. To publish directly to a CD or DVD, select CD/DVD Drive and select the drive location of your CD or DVD packet-writing device. This option will burn a single copy of your published repository directly to CD or DVD.

2. In the **Please specify a temporary directory** option, type the location to store the published repository. If you have selected publishing directly to a CD or DVD, this directory will only be used during processing, and the files will be automatically cleaned up by the publishing process. If you are publishing to a temporary directory, the published repository and viewer files will remain in this directory after publishing is complete. If you are publishing to an ISO file, only the final ISO file will remain in this directory after publishing is complete.

    Note: This directory must have sufficient space to store your published repository as well as temporary files necessary during publishing. It is a good idea to have three times the estimated size of the published repository free in this directory.

3. Click **Next**.

Plus Wizard: Published Repository Options

In the Published Laserfiche Repository Options step, you can configure settings for your published repository.


1. In the **Repository Name** option, specify the name by which the published Laserfiche repository will be identified. This will also be the name of your CD, DVD, or ISO file. Repository names may have up to 15 characters.

2. To include the necessary XML files to allow the published repository's volumes to be attached to a repository in the future, select **Allow the repository to be attached as a volume**. If you select this option, you can use your published repository as a backup.

Warning: Volumes in a compressed or encrypted repository can be viewed within the published repository using the Plus Viewer, but can only be attached to Laserfiche Servers of version 8.1 or higher. If you wish to attach your published repository's volumes to Laserfiche Server 8.0.x, do not choose to compress or encrypt them.

3. To include the user-specific viewing and exporting settings in the published repository, select **Export user settings and options**. For example, if you choose this option, your Folder Browser column settings will be used rather than the default columns.

4. To reduce the size of the published repository, select **Compress published repository**.

5. To password-protect the repository, select **Encrypt published repository**. Type the password that recipients of the published repository should use to access it in the **Password** option, and then type it again in the **Verify** option. This will prompt a user to input the password before they can access the published repository.

6. At the end of this step, you will see an estimated total size for the published repository. You should make sure that the publishing destination has enough free space. Please note that this estimate does not include documents or folders included as shortcuts.

7. Click **Next**. You may be prompted to confirm the creation of a new directory, if your specified publishing directory does not yet exist.

Plus Wizard: Completing the Publishing Process

In the Publish a Laserfiche Repository step, review your settings. To change any settings, use the **Back** button to return to the relevant step and make your changes. When you are satisfied with your settings, click **Publish**.
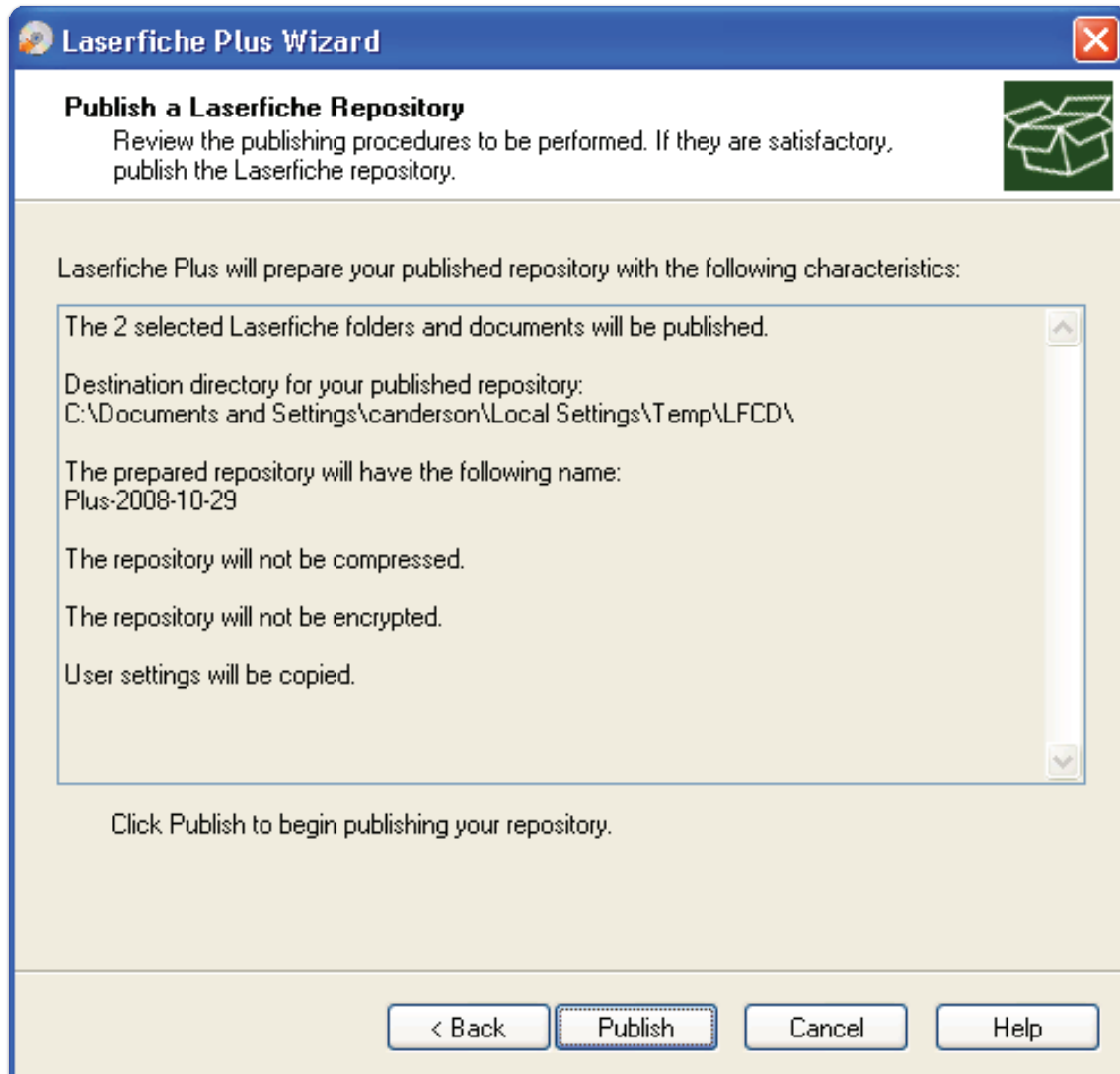

When finished, the **Completing the Laserfiche Plus Wizard** step will appear. Review the publishing rocedures that were performed. Click **Close**.

Viewing a Published Repository

A published Laserfiche repository includes the files and folders you chose to publish, as well as the annotations and metadata for those entries. It also includes a Laserfiche Viewer that allows you to search for and retrieve those documents. The Viewer is very similar to the Laserfiche Client, but, since a published repository is read-only, it does not allow users to modify entries in any way.

The Plus Viewer does not require the user viewing the repository to install any additional software. (We recommend, however, that you allow Plus to copy a few files to your local TEMP directory to considerably enhance performance.) A published Plus repository uses an automatically-included SQLite database, which can run directly from the published media. This makes it easy to distribute your published documents and streamlines the process of accessing those documents.
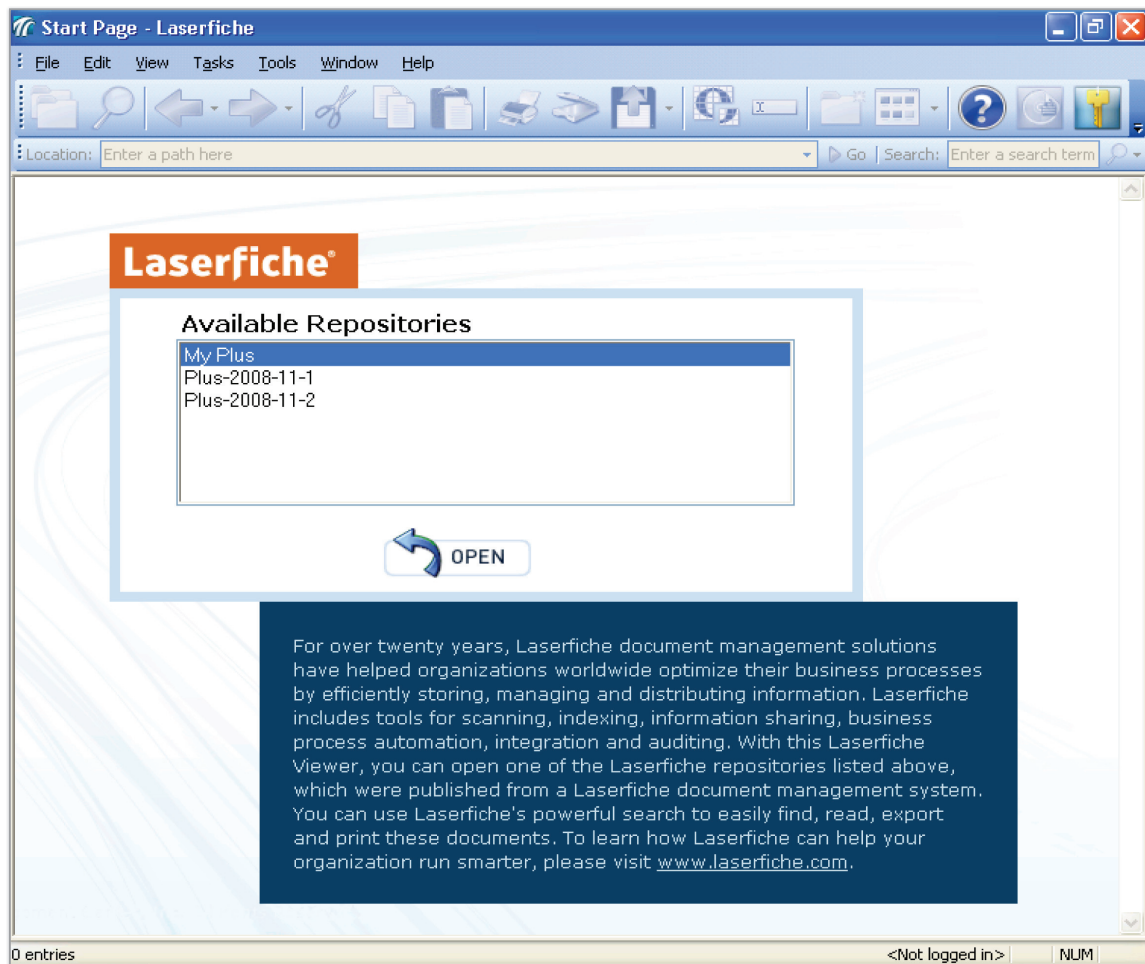
1. To open your published repository, simply insert your published CD, or navigate to your published directory, and launch the Plus Viewer. (If you are viewing the repository from a CD or DVD, the autorun should launch automatically; if not, you will need to select launch.exe.)

Note: Plus Viewer performance is considerably faster if Plus can copy a small set of files to the TEMP directory of your local hard disk. The first time you launch the Plus Viewer from CD or DVD on a particular computer, it will prompt you to allow these files to be copied. We recommend allowing this, as it provides significant performance advantages. This dialog will not be displayed if you are launching Plus from a temporary directory.

2. The Plus Viewer will open to the **Start Page**. This page will list the Plus repositories published in this publishing package.

3. Select your repository and click **Open**.

4. If the published repository was encrypted, you will be prompted for a password. Input your password and click **OK**.

5. Your published repository will open.

Publishing Best Practices

Plus offers three publishing methods to allow you to choose which entries to include: publishing by entry, publishing by volume, and publishing a set of search results. When planning your publishing process, you should decide which method is best for your needs.

Publishing by Entry

Publishing by entry allows you to select specific documents or folders to publish. If you select an individual entry, only that entry will be included, whereas if you select a folder, its contents will also be included. (You can also choose to include a folder's subfolders, their contents,their subfolders, and so on down the folder tree.)

Publishing by entry is particularly useful for distribution of related documents. In most cases, documents are organized into folders by some criteria—subject, date, or the user who created them—and you can therefore use folder publishing to publish documents of a similar type. For instance, you might have a folder that contains all reports submitted by a particular person, with subfolders for types of reports. You could create a distributable repository containing all reports submitted by that person by publishing the top folder. If you only wanted reports of a particular type, you could publish only the relevant subfolder.

When you publish a folder or set of folders, the structure of the folders (and any subfolders) is preserved. If the folder you are trying to publish contains shortcuts to documents, those documents will be included in the published repository; if it contains shortcuts to folders, the folders will be published if you have chosen to publish folders and subfolders.

Publishing by Volume

You can use Plus to publish all the files in a particular volume. This is particularly useful if you are using Plus to create archival copies or backups of your Laserfiche repository.

When you select by volume, the Plus publishing process gives you the option of retaining the information necessary to re-mount the volumes. This allows you to quickly restore the documents within them in the case of disaster, or to use Plus publishing to transfer volumes between more than one repository. You may also want to publish by volume if you use volumes to categorize documents—for instance, if you have an Accounting departmental volume that contains all of the accounting-related documents. This allows you to publish all of those documents, and only those documents, even if they are scattered among many folders in your repository.

Publishing by volume will publish every document in that volume, regardless of the folder it is in, and will retain folders that contain documents in that volume, as well as their parent folders. This allows you to maintain the folder organization for the volume. It will not retain folders that contain no documents in the volume unless they are parent folders to folders that do.

Publishing Search Results

Publishing a set of search results allows you to create a search that returns the results you want to include, and then publish those documents. It can be used with any search type; as long as the search returns a set of results, those results can be published.

Publishing search results allows you to publish all documents that meet criteria you specify—which means you can distribute exactly the files you need. You might publish all results that contain one or more keywords, all results with a particular value in the Author field, or all results that have a particular tag. This gives you a great deal of flexibility in what you publish, even if the documents are in different parts of the repository

When publishing a set of search results, you can choose to preserve the tree structure of the original repository or to place all search results in the same folder. If you choose the former, the tree structure will be preserved just as it is in volume publishing. If you choose the latter, all search results will be placed in the same folder at the root of the published repository, mirroring the set of search results you returned, regardless of their original folder.