

# Laserfiche Quick Fields 10 Webinar Questions

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**Webinar Date** 10 December 2015 and 17 February 2016

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## Answer Sheet

### General

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**Q: Is the Laserfiche Quick Fields Server now available?**

**A:** Not yet. The Laserfiche Quick Fields Server (as well as the other Laserfiche Quick Fields 10 changes discussed in this webinar) will be released with Service Pack 1, scheduled for release in early quarter 2 of this year.

**Q: We have just purchased Laserfiche Quick Fields. Should we wait for Laserfiche Quick Fields 10?**

**A:** I don't see a particular reason to wait to configure sessions, since sessions you create in Laserfiche Quick Fields 9 will work in Laserfiche Quick Fields 10. You may choose to wait on training scanner operators if you want them to use the new Laserfiche Quick Fields Scanning application, but even if you don't, the re-training required should be minimal.

**Q: Could you describe the review functions in Laserfiche Quick Fields?**

**A:** If you're referring to the web-based Document Revision functionality we've demonstrated previously, this will no longer be in the initial release, but is planned for a future release. Existing functionality for reviewing documents will still be available in Laserfiche Quick Fields 10.

**Q: Can you set up status/error emails per session?**

**A:** Laserfiche Quick Fields 10 does not contain new out-of-the-box functionality in this area. Depending on the type of errors you want to be notified about, your best bet is to use Laserfiche Workflow.

**Q: Will the simple interface for “only” scanner operators affect “full” scanner operators with rights through the Laserfiche Administration Console?**

**A:** If you are asking if scanner operators can continue using the Laserfiche Quick Fields application to scan (rather than the new Laserfiche Quick Fields Scanning), they can still do so. We have not removed the scanning functionality from the Laserfiche Quick Fields application.

**Q: Can sessions be assigned to specific operators?**

**A:** Yes, access rights can be configured in the Laserfiche Quick Fields Administration Console so that only specific operators can view the sessions.

- Q: Could I design a workflow that will assign the initial sessions to operator 1 and then send the results to operator 2 for quality assurance?**
- A:** Yes, Laserfiche Workflow can do this. For example, operator 1 could run a session to store the results in a Review In-Progress folder in Laserfiche. Then, a workflow could notify operator 2 to review the documents either by viewing them in Laserfiche or using another Laserfiche Quick Fields session.
- Q: Where is Optical Character Recognition (OCR) performed—on the workstation or server? Can the Distributed Computing Cluster (DCC) be used?**
- A:** When run as part of a Laserfiche Quick Fields session or document class, OCR (and all other Laserfiche Quick Fields processing) is performed on the local workstation, and does not use DCC. If you wish to optimize OCR performance, Laserfiche Workflow can use DCC to OCR your documents either before or after you process them with Laserfiche Quick Fields.
- Q: Is there Intelligent Character Recognition (ICR) now? Can we add it as an extra module?**
- A:** Laserfiche Quick Fields does not include ICR. However, you can use the Custom Process in Laserfiche Quick Fields to add it as an “extra module.”
- Q: If you scan a batch of similar documents and the system reads and automatically fills in a particular field, can you export that field into a spreadsheet? For example, can you export all the student name values populated into the Name field of each document?**
- A:** You can export the field data from Laserfiche into a spreadsheet after you’ve processed the documents using Laserfiche Quick Fields. See [this link](#) for details.
- Q: For invoices, can Laserfiche Quick Fields 10 perform line-item extraction/table extraction?**
- A:** Not yet, but we’re working on it for future releases. For now, the best way to accomplish this is with pattern matching.
- Q: For invoices, can Laserfiche Quick Fields 10 perform calculations such as multiplying the Quantity column by the Price per Unit column to get the value for the Extended Price column?**
- A:** It is possible to multiply two captured values together and use the result with a simple script in Laserfiche Quick Fields or by using Laserfiche Workflow’s Token Calculator activity. If you’d like to capture information in a table format, we’d need to know the format of your documents to recommend the best way to accomplish this in Laserfiche Quick Fields. Feel free to post a question on [Laserfiche Answers](#) about this issue if you need specific advice for your documents.
- Q: Will Laserfiche 10 work with Laserfiche Quick Fields 8.3?**
- A:** Yes, with the exception of functionality related to new features added to Laserfiche 10. For example, template-specific required fields may not work properly in Quick Fields 8.3.

## Installation/Server

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- Q: Does the Laserfiche Quick Fields Server need its own SQL Server installation on the same box or can it use/connect to the SQL Server installed on the Laserfiche Workflow box? Is it recommended to have Laserfiche Quick Fields and Laserfiche Workflow on separate servers?**
- A:** It depends on your load. You could put them on the same SQL Server for now, because the Laserfiche Quick Fields Server isn’t doing too much processing just yet (since session processing is still done locally). In future releases, however, the Laserfiche Quick Fields Server will perform a larger share of the processing, so you may find yourself eventually wanting to put them on separate servers if you expect to use both products heavily.

- Q: Is the new Laserfiche Quick Fields 10 Administration Console cloud-based or is it actually in our physical server bank?**
- A:** The Laserfiche Quick Fields Server is not cloud-based. It requires an on-premises server installation.
- Q: Does the Laserfiche Quick Fields 10 Server need to be in a server box or can it be installed on a Windows Client such as Windows 7?**
- A:** It can be installed on [any of our supported versions of Windows](#) (including Windows 7) that support Internet Information Services (IIS).
- Q: Can you install the Laserfiche Quick Fields Administration Console on multiple computers?**
- A:** The Laserfiche Quick Fields Administration Console is a web application, so you can access it from a browser on any computer that can access the Laserfiche Quick Fields 10 Web Server.

## Laserfiche Quick Fields Agent

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- Q: Is the Laserfiche Quick Fields Server the same thing as Laserfiche Quick Fields Agent?**
- A:** No, the Laserfiche Quick Fields Server and Laserfiche Quick Fields Agent perform totally separate functions (at least for now). The Laserfiche Quick Fields Server is a central location for sessions and document classes, as well as a place for managing security related to Laserfiche Quick Fields and its users. Laserfiche Quick Fields Agent is used to schedule Laserfiche Quick Fields scanning sessions.
- Q: What happened to Laserfiche Quick Fields Agent? Is Laserfiche Quick Fields Agent still available in version 10? Also, will there be a version 10 of Laserfiche Quick Fields Agent or is Laserfiche Quick Fields Agent version 9 backward-compatible?**
- A:** Laserfiche Quick Fields Agent will still be available in Laserfiche Quick Fields 10. See the next question for more details.
- Q: If leveraging Laserfiche Quick Fields Agent, how will Laserfiche Quick Fields 10 sessions be visible to the Laserfiche Quick Fields Agent? Will we need to create individual sessions as we do today? For example, will we be able take advantage of the single document classification to multiple sessions?**
- A:** For the initial Laserfiche Quick Fields 10 release, Laserfiche Quick Fields Agent will still work the same as it did previously. This means it does not yet use the sessions on the server (it will continue using local copies).

As for the second part of this question—the “single document classification to multiple sessions” feature will still be useful, but it will require a bit more user input to use this feature with Laserfiche Quick Fields Agent. Any changes published to a document class will still be applied to all the sessions on the server that use that same document class. But since Laserfiche Quick Fields Agent uses local sessions instead of server sessions, Laserfiche Quick Fields Agent won’t automatically grab the updated session on the server like Laserfiche Quick Fields Scanning does. However, all you’ll have to do to update Laserfiche Quick Field Agent’s version manually is to download the session from the server and use it to replace the copy that Laserfiche Quick Fields Agent was previously using.

- Q: Does Laserfiche Quick Fields 10 allow you to run a Laserfiche Quick Fields session while Laserfiche Quick Fields Agent is attempting to run it?**
- A:** Laserfiche Quick Fields Agent does not yet use the sessions on the server (it will continue using local copies). Therefore, users running sessions that are stored on the Laserfiche Quick Fields server will not experience conflicts due to what Laserfiche Quick Fields Agent is doing.

## Sessions

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- Q:** In Laserfiche Quick Fields 10, is the session file updated every time it is run? In other versions of Laserfiche Quick Fields, the date/time is updated every time, making it hard to know if the session file was updated by a person.
- A:** Session files will not update when you use Laserfiche Quick Fields Scanning to run them. Using the Laserfiche Quick Fields server, it should now be much easier to see if the session file was updated by a person (and you'll even be able to see the full version history of the session in the Laserfiche Quick Fields Administration Console).
- Q:** If you publish an update, does it go into effect immediately or does it kick in the next time the scanner operator signs in and chooses that session? Will the update affect the current session they are working in?
- A:** For scanner operators using Laserfiche Quick Fields Scanning, published updates to a session will go into effect for newly scanned documents without the scanner operator having to sign in again. Even if the scanner operator currently has a session open in Laserfiche Quick Fields Scanning, he will be prompted to update to the new version the next time he presses "Scan."
- Q:** Do existing sessions need to be re-created in Laserfiche Quick Fields 10?
- A:** No, there is no need to re-create any existing sessions. To use Laserfiche Quick Fields Scanning and other new features with sessions that were built in Laserfiche Quick Fields 9, all you have to do is open your existing session with Laserfiche Quick Fields 10 and go to File -> Publish to publish it to the Laserfiche Quick Fields Server.

## Questions on Demo

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- Q:** Are the users in the Laserfiche Quick Fields Administration Console Laserfiche users or Active Directory users?
- A:** The users you see in the Laserfiche Quick Fields Administration Console are Active Directory users.
- Q:** When should messaging be displayed?
- A:** The Messages Pane in Laserfiche Quick Fields Scanning shows information about token values captured from documents, pages that were removed, and any processes that encountered warnings or errors. It's pretty much the same information you see in the Laserfiche Quick Fields Processing Information Pane, so any scanner operator who is used to using that information will probably want to see the Messages Pane in Laserfiche Quick Fields Scanning.
- Q:** After splitting documents, can you show merging documents?
- A:** We ran out of time to show this in the demo, but merging documents should work pretty similarly to splitting, depending on exactly what aspects of the document you're looking to merge. You can use Laserfiche Quick Fields Scanning to drag and drop pages from one document into the other, and then rerun the processing as needed.
- Q:** In the demo, I see the student names are being populated in the far left column under "Documents." Were these names auto-populated from the document or are they from a database?
- A:** In the example, the names for most of the documents were retrieved from a database by running a lookup on the Student ID, which was captured using pattern matching. However, you could make a similar session by reading the student name directly.

**Q:** Are you using barcode sheets to separate the documents? If you weren't using barcode sheets, how did the system separate the document?

**A:** I did not use barcode sheets in this example, but I definitely could have. For most of the documents in the example, I used a Text Identification process in First Page Identification to separate them.

## Licensing/Pricing

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**Q:** Was there any consideration in changing licensing to be more like that of Laserfiche Directory Server so that Value Added Resellers (VARs) and customers can better manage licenses?

**A:** In Laserfiche Rio Installations, Laserfiche Quick Fields licenses are already managed by the Laserfiche Directory Server.

**Q:** Does this also create another SQL Server database?

**A:** Yes, the Laserfiche Quick Fields Server uses a SQL database.

**Q:** Do new “document classes” make the document classification add-on superfluous?

**A:** From a technical standpoint, the ability to use multiple document classes per session still results in significant classification functionality that isn't possible without it.

**Q:** Is the Laserfiche Quick Fields Server licensed separately from Laserfiche Quick Fields? Is the Laserfiche Quick Fields Server a separate purchase? Will the Laserfiche Quick Fields Server cost anything extra or be an additional module, or will that be added as a bonus feature? Is there an additional server license cost?

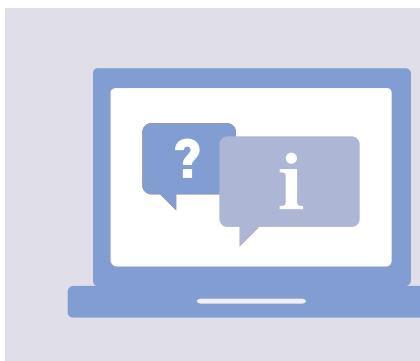
**A:** As with other aspects of licensing, this is still undecided. However, it is worth mentioning here that the new Laserfiche Quick Fields Scanning application exclusively uses sessions on the Laserfiche Quick Fields Server, so you will not see a scenario that involves using the Laserfiche Quick Fields Scanning application without a Laserfiche Quick Fields Server.

**Q:** Will Laserfiche Quick Fields 10 work on a Laserfiche United system? Can Laserfiche Quick Fields 10 integrate with Laserfiche 9 and Laserfiche United users OR does the Laserfiche Server need to be version 10 as well? Are any of these features unavailable to those on the Laserfiche United/Laserfiche Team setup?

**A:** This has not yet been determined.

**Q:** We have issues with deactivation and current fingerprint licensing. Will this change?

**A:** This depends on the specific issue. Feel free to contact support if you need assistance.



# HAVE MORE QUESTIONS?

Check out [Laserfiche Answers](#)