

Laserfiche Scanning: Teacher's Guide

In teaching Laserfiche Scanning, you will be teaching your students how to use the Laserfiche Scanning tool to get the best results for their particular scanning task. This may include choosing a scanning source, choosing whether and where to install Laserfiche Scanning itself, determining how to process the documents and how to assign metadata, and teaching them how to use the basic tools of the Laserfiche Scanning program.

Before you begin

Find out what scanning devices and procedures your students will be using, what type of documents they will scan, and how they will split up scanning tasks (will you be instructing scanner operators, or casual users?) Try to replicate the scanning setup your students will be using. Make sure you are familiar with the options for their chosen scan source and scanner model.

Make sure you have any capture devices you plan to demonstrate to your students set up and tested with drivers installed. This may include different types of scanners and digital cameras, or you may choose simply to use scan sources like Universal Capture that don't require additional equipment.

Install the Laserfiche Client and Laserfiche Scanning on your demonstration machine(s). Include Universal Capture in the scanning installation for quick and simple demonstrations. Set up a folder from which Universal Capture can retrieve TIFF files and populate it with sample TIFF files for capture demonstrations.

Familiarize yourself with the subjects you will be discussing. Read the Scanning white paper and the Scanning Troubleshooting guide. Refer to the documentation for more information about particular options and enhancements available in Laserfiche Scanning.

Keep in mind

Try to prepare students for what they'll actually need to use. Scanner operators will need to understand Standard mode and its various options, but other users may only need the functionality of Basic for occasional document scanning. Focus on results; not every enhancement will need to be used, or every option changed, in day-to-day scanner usage.

Introduction to Laserfiche Scanning

- Hands-on demonstration

Describe to students the basic functionality of Laserfiche scanning and its relationship to the main Laserfiche client. Note that Scanning is a free component of the Laserfiche client, but does not need to be installed with every client installation; users may choose to

install it on most machines or only on a few that are used for large-scale scanning operations.

Basic vs Standard mode

- Basic: One document at a time
- Standard: Batch scanning, more image enhancements

The first choice users are asked to make when they open Laserfiche scanning is: Standard or Basic mode? Demonstrate these two different modes to your students. Explain the different ways they are used, showing how Basic has a simplified interface and closes after sending the document to Laserfiche, and is therefore used for single-document jobs, while Standard's more complex interface makes it appropriate for large batches.

Scanning sources

See the Scanning White Paper for a detailed description of scanning sources. Most users will only be capturing documents with one or two different scanning sources, so concentrate on these. Note that the scanner options will be different based on the scanning source selected. If your students are interested in exploring different types of document capture, you may briefly discuss alternative capture methods such as digital cameras and Universal Capture.

Hands-on demonstration

Start with the basic mode. You can begin by demonstrating how to retrieve the dialog that presents a choice between Basic and Standard mode if it doesn't appear when the user selects Scanning.

- Begin by demonstrating how to use their chosen scanning method. Show students how to set up their scan source.
- Briefly discuss the enhancements available in Basic mode. Show students how to OCR documents.

After demonstrating Basic mode, go to Standard mode.

- Demonstrate the settings and options available in Standard mode. These are discussed in detail in the documentation.
- Show the students the different panes: configuration, output, document properties, revision, and document text. Describe the function of each one.
- From the associated text view, highlight ASCII text, then drag and drop it into a template field. This drag-and-drop functionality can be particularly useful in filling out template fields and other document information, so be sure to demonstrate its potential uses.
- Discuss OCR enhancements available for captured documents. These are described briefly in the Scanning White Paper and more thoroughly in the documentation. In advanced courses, show students each enhancement and its effects; for casual users or users who will scan only a few different document types, you may demonstrate only those enhancements they will need for everyday

use. Discuss how enhancements affect OCR accuracy. Show students how to OCR documents.

Points to emphasize

Reiterate the differences between basic and standard mode.

Basic mode:

- Is intended for single-document scan jobs; once the document is sent to the repository, the program will close.
- Has a simplified, streamlined interface with just a few enhancements

Standard mode:

- Is ideal for multiple documents and batch processing, and does not close after documents are sent.
- Provides a wide variety of enhancements
- Can use tokens for document naming
- Allows text drag-and-drop.

For scanning overall, remind students that scanning is an optional component of the Laserfiche client installation, meaning that they can choose to install it where they need it at no additional cost, and to leave it off of workstations where it isn't necessary. Discuss the setup options for their scanning source. Remind students that their document tokens will not be saved from session to session.

Troubleshooting

The [Laserfiche Scanning troubleshooting white paper](#) available on the Institute Press provides a good overview on the subject of Scanning troubleshooting.

The most basic problem users may encounter is simply that Scanning is not installed. Users may not be aware that the Scanning install is optional, so they may expect it to be available even if it has not been explicitly installed. Scanning may also be improperly licensed, in which case users can back up their old license by renaming it (for instance to If.lic.backup) and put a new, correct license in their license folder.

Another very common problem with Scanning occurs when the scanner drivers themselves develop problems. These problems may appear to cause Laserfiche Scanning to malfunction, even though they are actually based in the underlying scanning software. Instruct students to test the scanner with other scanning programs to see if the problem is with the underlying scanner software rather than with Laserfiche scanning.

Outline View

Basics

- Choice between 'Standard' and 'Basic'
 - Basic: One document at a time
 - Standard: Batch (and some other processing options)
- Scanning sources:
 - TWAIN scanning
 - Kofax
 - ScanConnect
 - Universal Capture
 - Photo Capture
- Scanner options (settings) based on what's selected

Loading

- Start w/ 'Basic'
 - If basic/standard dialogue is not there, show how to get it back
 - Universal Capture (TIFF's)
 - Scanner setup: read from Client folder, 'move' to that folder
 - Talk about tools
 - OCR
 - Enhanced elements
 - Go over each one
- Now go to 'Standard'
 - Go over settings/options
 - Panes
 - Highlight, then drag & drop ASCII text into template field (from associated text view)

Points to Emphasize

- Basic
 - Single document
 - Simple scanning
 - Only a couple of enhancements
 - Once sent, the program closes
- Standard
 - Multiple docs
 - After send, can still use
 - Batch processing
 - Lots of enhancements
 - Tokens for doc naming
 - Drag and drop text ☺

- Overall
 - Can't save document token settings
 - No additional cost, but choose to install with Client
 - Scanner setup options

Troubleshooting

- Make sure scanning is installed
- Replacing license to include Scanning
 - Back up original (like lf-old.lic)
 - Restart server service if all on same machine
- Testing scanner
 - Other apps, like MS desktop scanning



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