

Laserfiche Client Options

Quick Reference

January 2006



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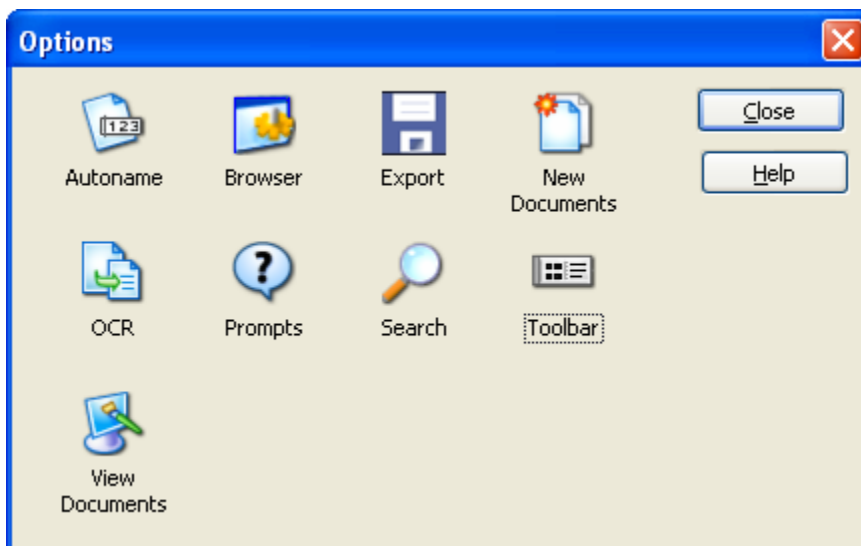
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Laserfiche Client Options

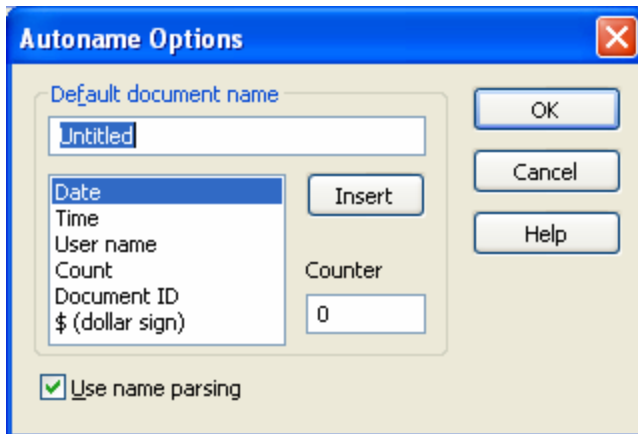
The Laserfiche Client Options menu gives users the opportunity to customize their Laserfiche Client in a variety of ways. They can change the appearance and layout of many aspects, as well as altering the behavior of the client to help them work more efficiently.

Options set or modified in the Laserfiche Client's option dialog are not universally applied to the repository. The Client associates options settings with the Windows user logged in to that particular machine at the time the option is changed. This allows multiple users to set different options to suit their own needs on the same machine.



Autonaming

To open the Autaname Options dialog, click the Autaname icon in the Options menu. The Autaname dialog allows you to configure the name that will be applied to Laserfiche documents by default, if the user doesn't manually input a document name.



Default Document Name: The default document name option allows you to specify the name that will be automatically assigned to documents if the user does not input a document name.

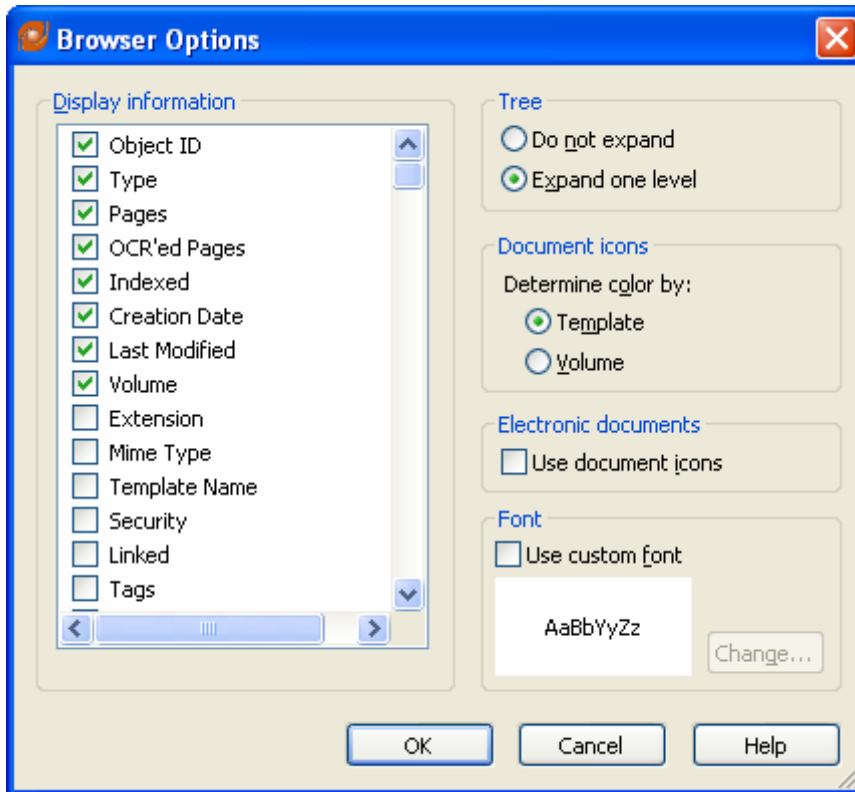
You can insert tokens into the default document name by selecting the token – Date, User name, et cetera – and clicking

Insert. With Laserfiche 7.0.x and 7.1.x, the tokens will be replaced with the relevant information when documents are scanned into the repository. With Laserfiche 7.2, the relevant information will be included for all new and imported documents.

By default, if you use the Count token, the counter will start with zero. To set the counter to start at a different number, input that number in the Counter box.

Browser Display

To open the Browser Options dialog, click the Browser icon in the Options menu. The Browser Options dialog allows you to configure the appearance of the Laserfiche Client's folder tree and folder browser.



Display

Information: You can configure which columns are displayed in the folder browser for folders and documents. This allows you to display some or all of the template field values as well as more general information.

Tree: The tree option allows you to configure the initial display

of the folders. If you choose "Do not expand," only the root folder of the repository will be displayed. If you choose "Expand one level," the folder tree will display both the root folder of the repository and the folders contained within the root folder.

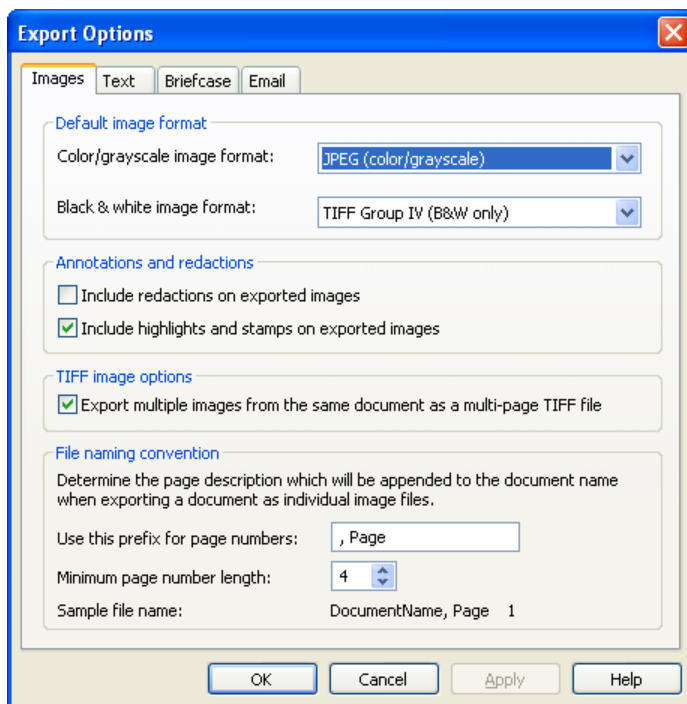
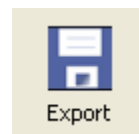
Document icons: The Laserfiche document icon's color depends on the features of the document itself. This setting allows you to determine whether you want all of the documents from the same volume to have the same color, or all of the documents with the same template to have the same color.

Electronic documents: By default, electronic documents are displayed using the icon associated with their native file format – Microsoft Word documents display the Word icon, and so on. If you select the 'Use document icons' option, however, electronic documents will be displayed with Laserfiche document icons.

Font: By default, the Laserfiche Client uses the same font for the folder browser display as the default Windows Explorer font. By selecting 'Use custom font,' you can customize the font display to choose the text font, size and style you prefer. Click Change to specify the text font, size and style.

Export

To open the Export Options dialog, click the Export icon in the Options menu. The Export Options dialog allows you to specify the settings and options for exporting Laserfiche images, text documents, briefcases and, if Email Plug-in is installed, for exporting documents in email.



Images

Default image format: You can set the default formats in which images will be exported. You can specify different formats for color or grayscale image, and for black and white images. These are the options that will be used if you leave the image format set to 'default' when you export images – Laserfiche will automatically detect whether the image is color/grayscale or black & white and print it using the appropriate default setting. (Note that you can also manually specify a different

image format at the time of image export; this setting only controls the default format.)

Annotations and redactions: You can specify whether to include redactions, and whether to include highlights and stamps. If redactions are included, the images will be exported with the redaction permanently in place. Note that this setting only affects the document if the user has the right 'See Through Redactions' on the exported document. If the user does not have this right, the redaction will be automatically printed on the image. If a user chooses to include highlights and stamps, any highlights and stamps which that user has the rights to see on the exported document will be present on the exported document.

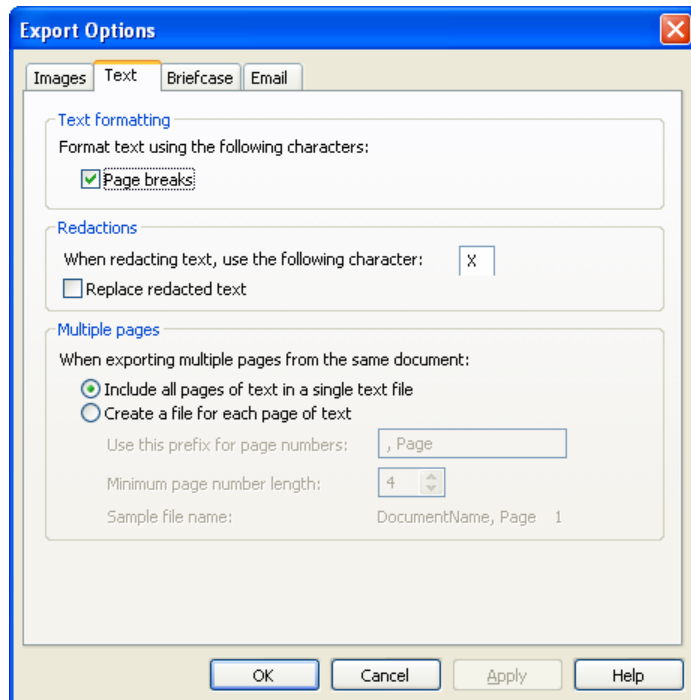
TIFF image options: If more than one page in a document is exported, and if you are exporting the image in TIFF format, you can specify whether the pages should be exported as a multi-page TIFF file or as multiple single-page TIFF files. Note that this setting has no effect on files in non-TIFF formats.

File naming convention: If you choose to export multiple pages, and you are either exporting them in an image format other than TIFF or PDF, or if you have chosen to export TIFF images as single pages rather than as multi-page TIFFs, you can specify the names given to the individual pages. The first part of the name is the same as the document's name; this is followed by the page number. You can specify a prefix for the page number, and determine the length of the page number; for instance, if you set the minimum page length to 4, page one would look like 'Page 1' and page ten would look like 'Page 10.'

Text

Text formatting: If you are exporting multiple text pages to a single text file, selecting this option will separate the individual pages with page breaks. This setting has no effect on single text pages.

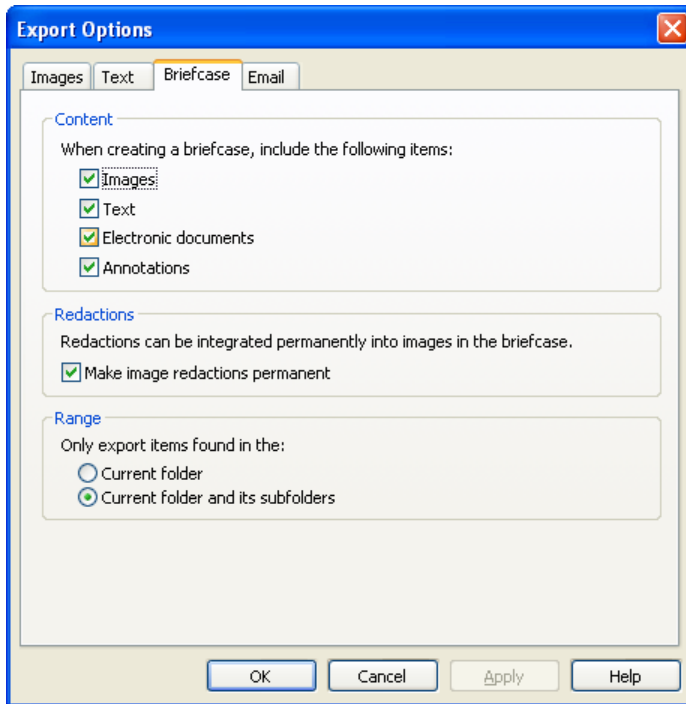
Redactions: If a text file that includes redactions is exported, you can determine the character that will replace the redacted text. For instance, the following sentence might exist in a text file: "The quick brown fox jumps over the lazy dog." If the word 'jumps' was redacted, and the character X was selected as the redaction character, the text would be exported as, "The quick brown fox XXXXX over the lazy dog."



If you have the 'See Through Redactions' right on the document to be exported, you can select the 'Replace redacted text' option to replace the redacted text with the redaction character. If this option is not selected and you have the 'See Through Redactions' right, the text will be exported without being redacted. If you do not have the 'See Through Redactions' right on the document, the text will automatically be redacted; this option will have no effect.

Multiple pages: If you are exporting multiple pages from the same document, you can choose to merge the pages into a single text file or create separate text file for each page. If you choose to create multiple text files, you will need to

configure the page number format for those files; for details, see "File Naming Conventions" in the Export Image option, above.



Briefcases

Content: You can specify what types of files are included in a briefcase when it is exported from Laserfiche. You could choose to only export electronic documents, for instance, or could choose to export everything but the annotations associated with the documents. Note that these options do not affect security settings in any way; if you do not have the right to see annotations on a document, the annotations will not be included even if you select 'include

annotations.'

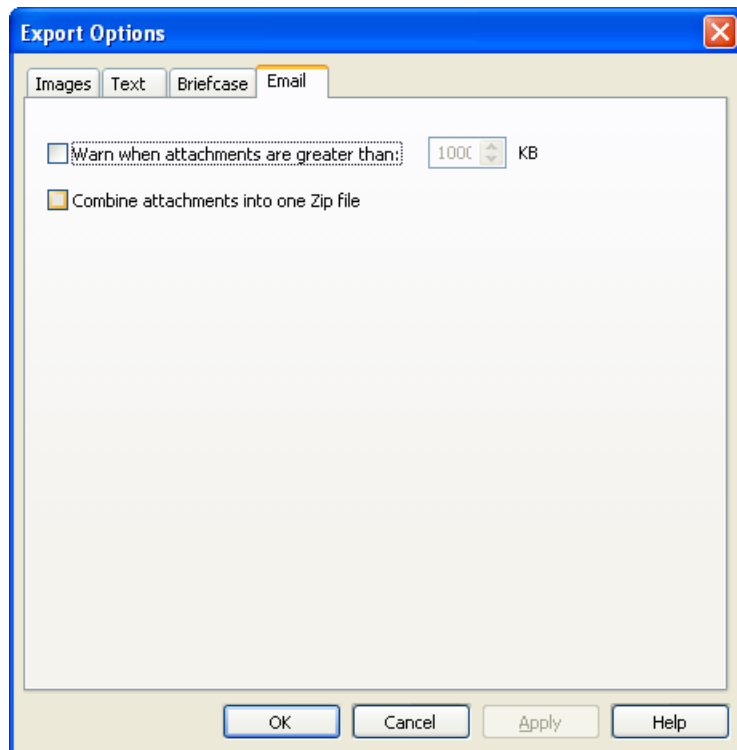
Redactions: You can choose to permanently incorporate redactions into the exported images. If this option is chosen, the redaction will be a part of the image itself; even if the briefcase is imported into a repository, the redaction section of the image will not be viewable by any users, as the redaction has become part of the image. This setting only affects those documents on which the exporting user has the 'See Through Redactions' right; redactions will automatically made permanent for users who do not have the rights to see through the redactions. The setting does not affect the original image in any way.

Range: You can specify the scope of documents that the Client will include in the exported briefcase. If you select 'Current folder,' only the files in the current folder will be exported; subfolders will be ignored. If you select 'Current folder and its subfolders,' the subfolders will be included, as will the documents in those folders.

Email

If you have the Laserfiche Email Plug-in, an Email tab will be available in the Export Options dialog. You can configure the way that documents are handled when they are exported in an email document.

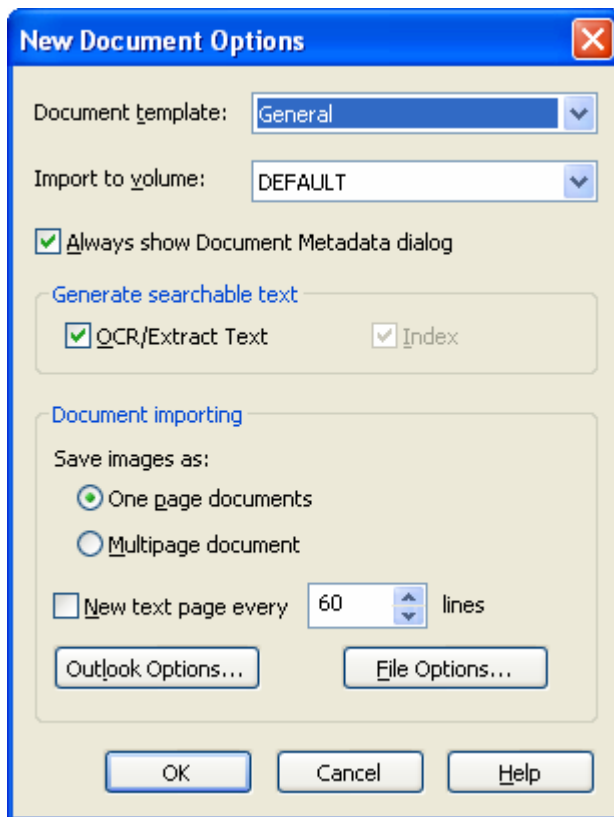
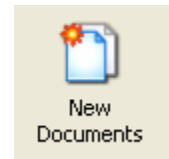
Since large emails can take a long time to download, you may not wish to send very large attachments to some email recipients. By selecting "Warn when attachments are greater than..." and inputting a size in KB, you can configure the Laserfiche Client to send a warning whenever a set of attachments would exceed a particular size.



If you are sending multiple documents, you may wish to zip them together to help manage a large list of files or to reduce the size of the attachment. You can do so by selecting 'Combine attachments into one Zip file.'

New Documents

To open the New Document Options dialog, click the New Documents icon in the Options menu. The New Document Options dialog allows you to specify the settings and options for newly-created documents, including options for creating new documents from Outlook email message and options for handling file types.



In the "Document template" and "Import to volume" options, you can specify the default template and volume for new documents. (Note that this value can still be manually configured by the user; these settings only control the default value.)

Selecting or clearing the "Always show Document Metadata dialog" option will determine whether the Import to Laserfiche dialog will be automatically opened when creating or importing new documents. This dialog allows you to set the document name, folder and volume; choose a template and set field information; and set tags on the document. If you clear this option, the dialog will not be opened, and

documents will automatically be assigned the default name, volume and template.

Generate Searchable Text: You can determine whether documents should be OCR'd or have text extracted from them by default when they are created. If auto-indexing upon creation has not been enabled in the Administration Console, you can also determine whether documents should be indexed. (If auto-indexing upon creation has been set at the Administration Console level, the option will be grayed out in this dialog, as the option cannot then be turned off at the Client level.)

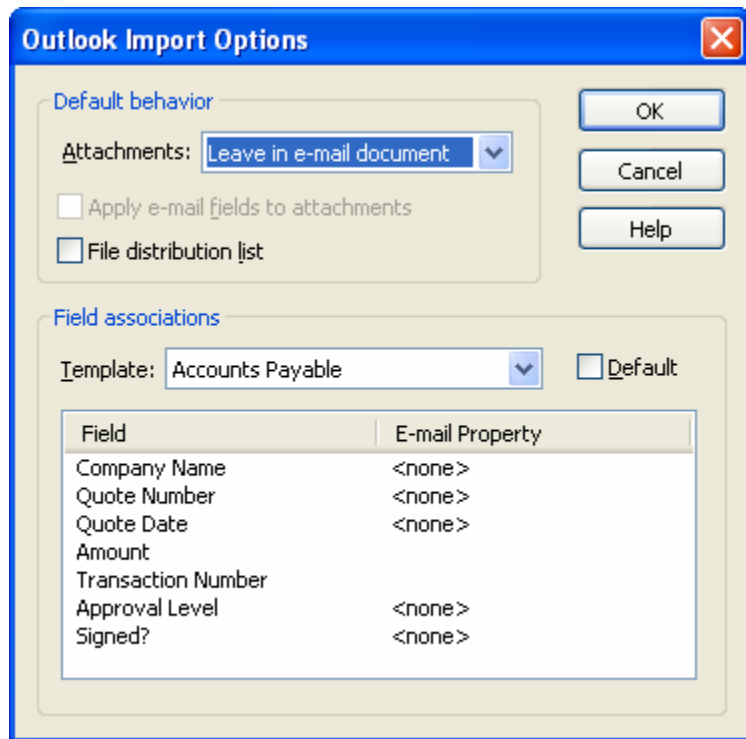
Document importing: You can choose to save imported images as one-page documents or as multipage documents. If you choose to save imported

images as one-page documents, a single image file will result in a single document file. (Please note that if the file type supports multi-page images – for instance, TIFF files – the document may have multiple pages; this option will not split a multi-page TIFF file into multiple single-page TIFF files.) If you choose to save imported images as multipage documents, importing more than one image at the same time will create a single document containing all of the image files. The document will have the same name as the first file in the list of imported files.

Outlook Imports

By selecting the "Outlook Options..." button, you can open the Outlook Import Options dialog.

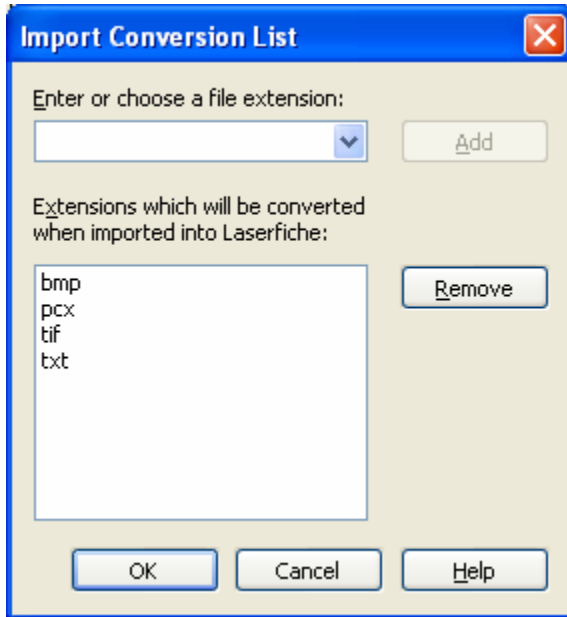
Default behavior: You can determine how attachments are handled when an email is imported by selecting one of the items in the "Attachments" list. "Leave in e-mail document" will keep the attachment in the imported email message. "File separately" will import the attachments as separate electronic documents and remove it from the email message. "Leave in and file a copy" will create a separate electronic document and also leave a copy of the document in the email message.



If you choose to import the attachments as new electronic documents, you can select "Apply e-mail fields to attachments" to apply the same template fields to the attachment as to the email message. Selecting "File distribution list" will create an additional file containing all of the names and email addresses listed in the TO, CC and BCC fields.

Field associations: The Field associations option allows you to associate certain fields in the Laserfiche templates with certain properties of the email itself. For instance, you could choose to have a Date/Time field in the template populated with the Time Received or Time Sent field of the email.

You can also select one of the templates and click the Default box to make that the default template to be applied to newly-imported email messages.

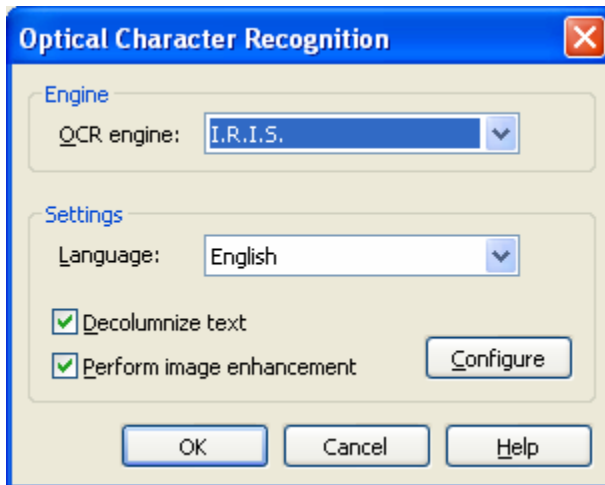
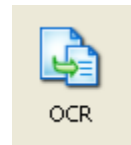


Import Conversion

By selecting the "File Options..." button in the New Documents dialog, you can open the Import Conversion List dialog. This dialog allows you to select what image files will be converted to Laserfiche documents when they are imported into the repository. Images whose file extensions are listed in the conversion list will be converted to TIFF format and made into Laserfiche documents. Images whose file extensions are not listed will remain in their native file format and will be imported as electronic documents.

OCR

To open the Optical Character Recognition dialog, click the OCR icon in the Options menu. The OCR Options dialog allows you to specify your OCR preferences and set your image clean-up options.



Engine: You can select your OCR engine from the list. Please note that, under almost all circumstances, you will want to leave the OCR engine set to I.R.I.S.

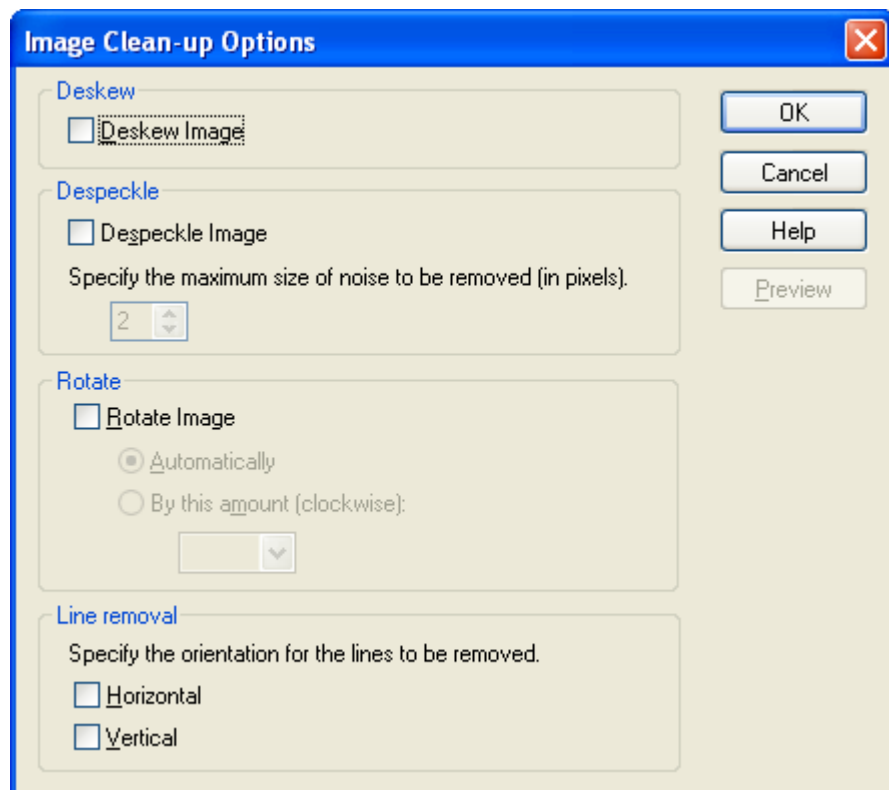
Settings: You can select the language for which you want to optimize your OCR settings. Setting the OCR language to match the language of the document will increase OCR accuracy. You can choose whether to decolumnize

text, so that text that takes up two or more columns on an image appears as a single column in the text document. Finally, you can choose to temporarily enhance or 'clean up' the image prior to OCRing. If you choose this option, click the Configure button to specify your image clean-up preferences.

Image Clean-up

Deskew:
Selecting this option will straighten crooked images.

Despeckle:
Selecting this option will remove tiny spots and other 'noise' from an image. You can specify the maximum size, in pixels, of



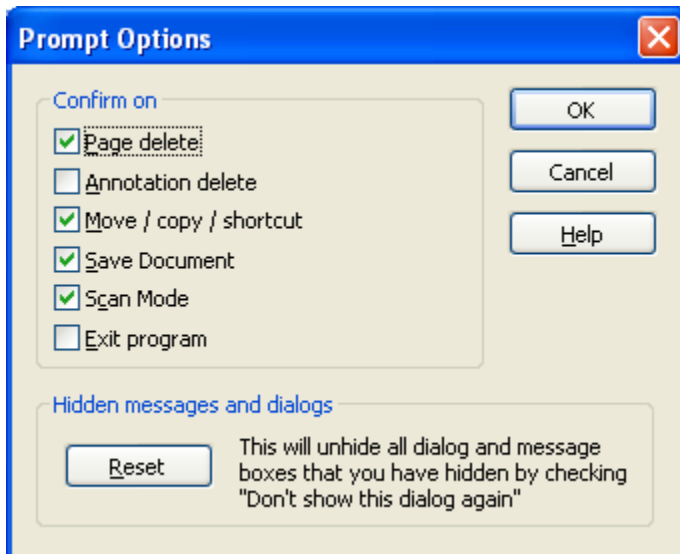
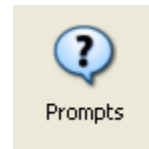
stray spots to remove.

Rotate: You can choose to rotate images either automatically or by a set amount. Automatic rotation is best if images may be imported in any orientation, but it takes longer than rotating by a set amount as the page must be OCR'd to determine the correct orientation. If all pages will be imported with the same incorrect orientation, you should use Rotate 'by this amount.'

Line removal: You can choose to remove horizontal or vertical lines from an image. If a character will be damaged by line removal – for instance, if a line bisects a character, and therefore line removal would also remove part of the character – the line removal process will also repair those characters.

Prompts

To open the Prompt Options dialog, click the Prompts icon in the Options menu. The Prompts Options dialog allows you to specify what prompts in the Laserfiche Client you wish to see.



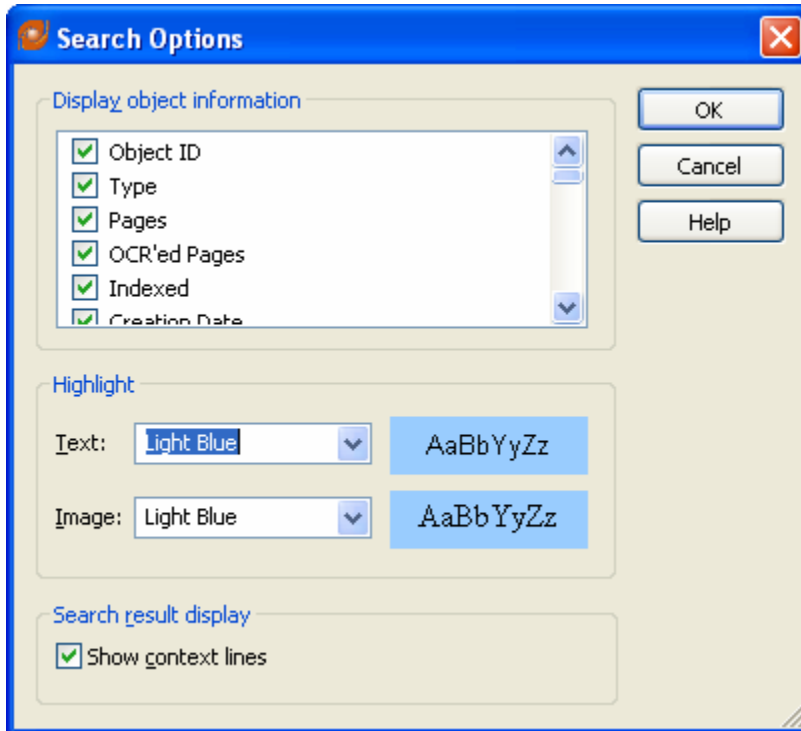
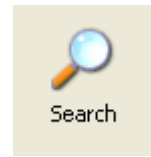
Confirm on: This option allows you to specify what prompts you wish to see and what prompts you do not wish to see. For instance, if you do not wish to be prompted every time you exit the program, you can clear the Exit program box.

Hidden messages and dialogs: In addition to turning certain prompts on and off in the Confirm on dialog, you can also turn

certain prompts off by selecting "Do not ask me again" in the prompt box itself. The "Hidden messages and dialogs" allows you to unhide all of the prompts that you hid in this way. Note that it does not affect the prompts configured in the Confirm on dialog, as those can be individually hidden or unhidden.

Searching

To open the Searching dialog, click the Search icon in the Options menu. The Search Options dialog allows you to specify the fields that will be displayed in the search pane and to configure the appearance of searched-for text.



Display object information: You can configure which columns are displayed in the search pane. This allows you to display some or all of the template field values as well as more general information.

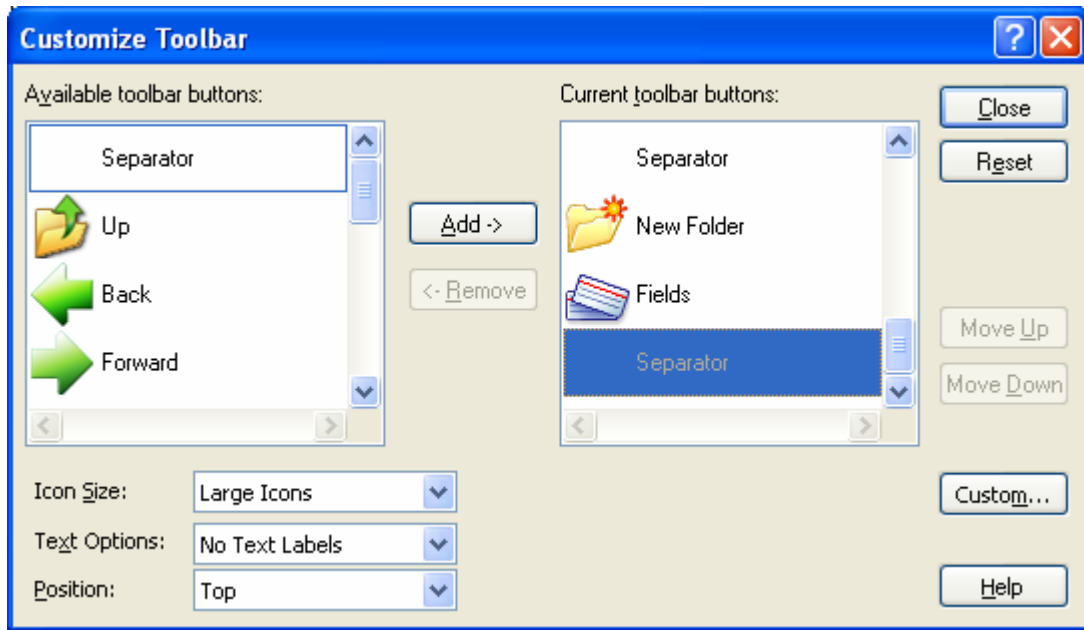
Highlight: This option allows you to customize the colors used to highlight keywords found in the search results. This also allows you to set different colors

to distinguish highlights on the image from highlights in the text.

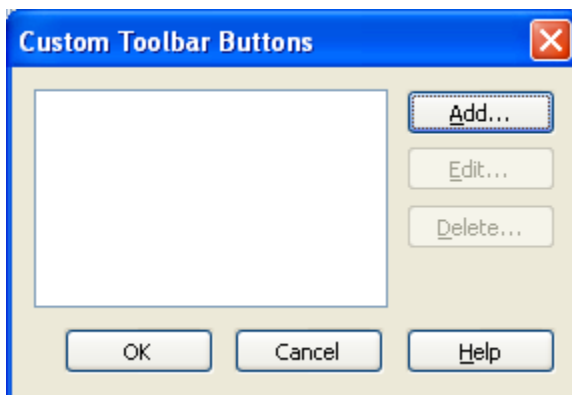
Search result display: If you select the Show context lines option, the context of the keywords found in the document will be displayed when you select the search result in the search pane. If you clear this option, no context will be displayed.

Toolbar

To open the Toolbar dialog, click the Toolbar icon in the Options menu. The Toolbar Options dialog allows you to customize the appearance of the toolbar in the Laserfiche Client and add custom buttons.

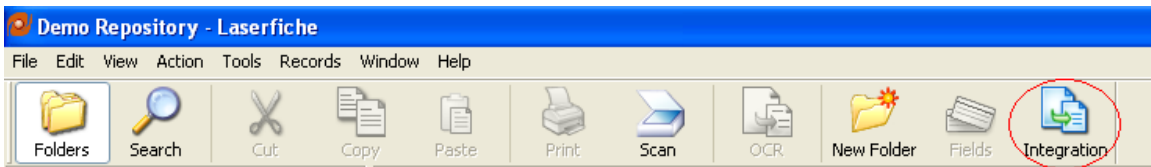
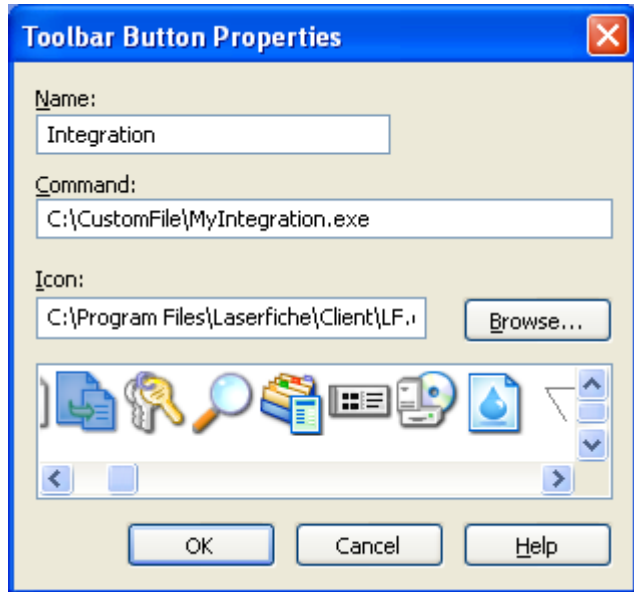


You can add toolbar buttons for actions or processes you frequently complete, or remove toolbar buttons for processes you do not often need. You can also configure the size of the icons and the presence of text labels in the Icon Size and Text Options lists. The Position list allows you to specify where on the screen the toolbar should be placed.



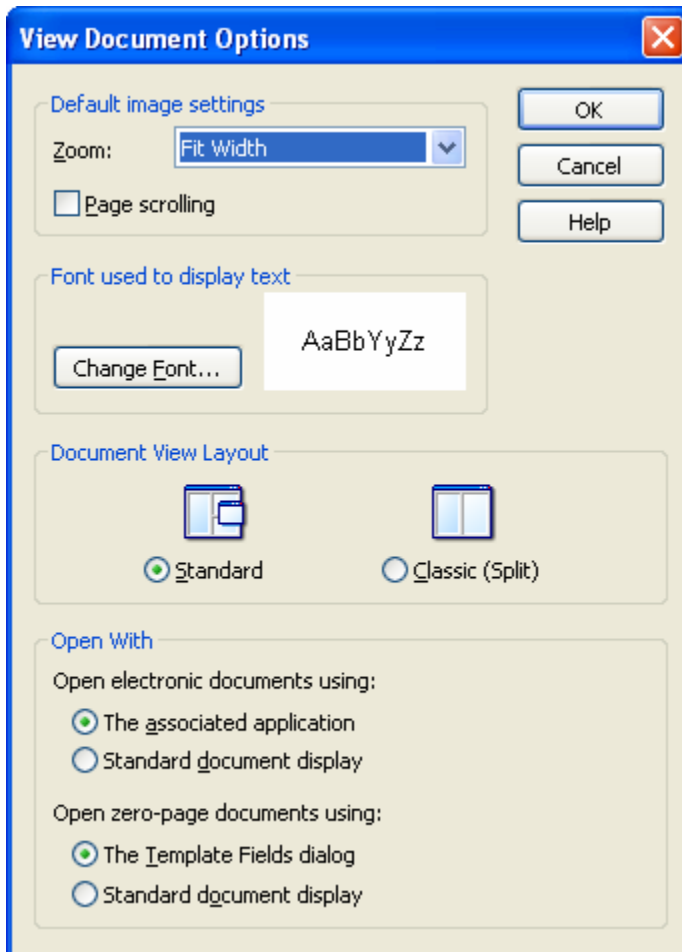
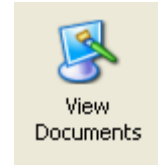
You can create a new, customized toolbar icon by clicking Custom, which will open the Custom Toolbar Buttons dialog. If you have existing custom buttons you would like to modify, select the button and click Edit. Otherwise, click Add to create a new toolbar button.

To create a new button, input the name of the new button in the Name option. In the Command option, input the path to the file you wish to open upon pressing the button. (For instance, in this case clicking the button would open a custom integration created in Toolkit called MyIntegration, located at C:\CustomFile.) Then navigate to an icon file and select your icon. Click OK to finish. You may need to restart your client for the new button to take effect.



View Documents

To open the View Document Options dialog, click the View Documents icon in the Options menu. The View Document Options dialog allows you to customize the appearance of the Document Viewer in the Laserfiche Client and configure the method for opening certain special types of files.



Default image settings: This option allows you to configure the default magnification used to display an image in the Document Viewer.

Font used to display text: By selecting 'Change Font,' you can customize the font display to choose the text font, size and style you prefer for the text associated with the document.

Document View Layout: There are two basic options for the layout of the document viewer: Standard, which allows you to configure up to four panes, and Classic, which allows you to configure up to two panes and which is reminiscent of the Document Viewer in Laserfiche 6.

Standard allows for more flexibility and the ability to see more information at once, while Classic may be desirable for users who were very comfortable with the Laserfiche Client 6.

Open With: The Open With option allows you to customize the way that certain special document types are opened. You can determine whether electronic documents should be opened with their native application, or whether the template field and any associated text or Snapshot images should be opened by default instead. You can also determine whether zero-page documents should open just the template field, or the entire Document Viewer.



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