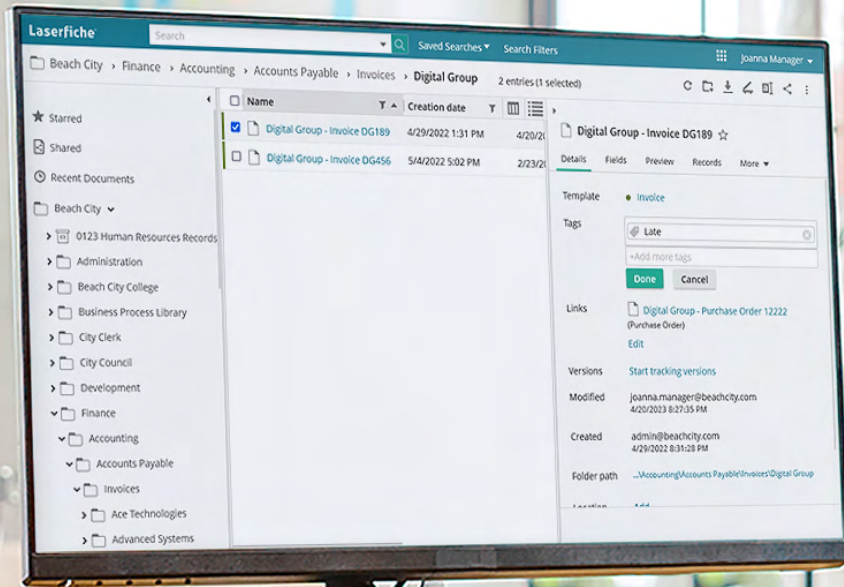




GETTING STARTED WITH Laserfiche





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Introduction

Welcome to Laserfiche! This guide will help you start using the most common Laserfiche repository features. You can get more information from the additional resources listed at the [**end of the guide**](#).

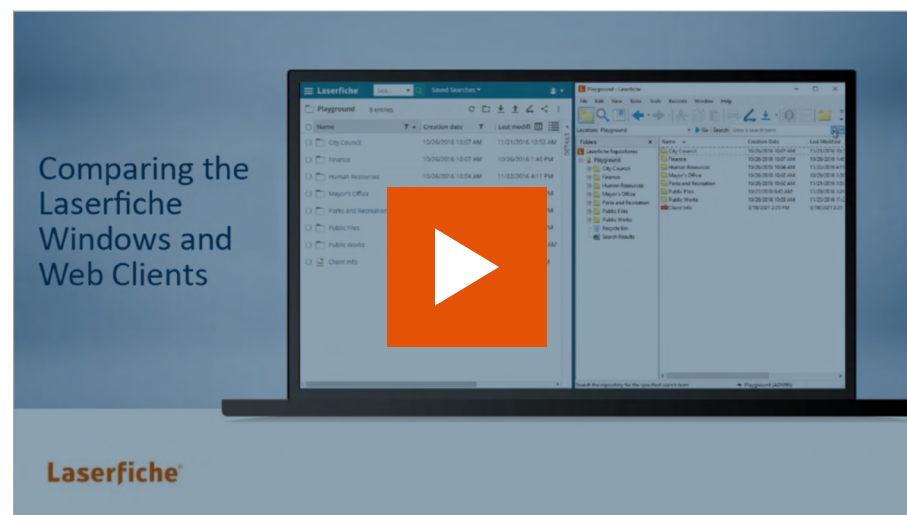
The terminology in these sections is also defined at the [**end of the guide**](#).

Accessing Your Laserfiche Repository

The Laserfiche repository can be accessed in three different ways:

- The Laserfiche web client
- The Laserfiche Windows client
- The Laserfiche mobile app

The following information relates to the web client, which is the most common way of accessing Laserfiche.



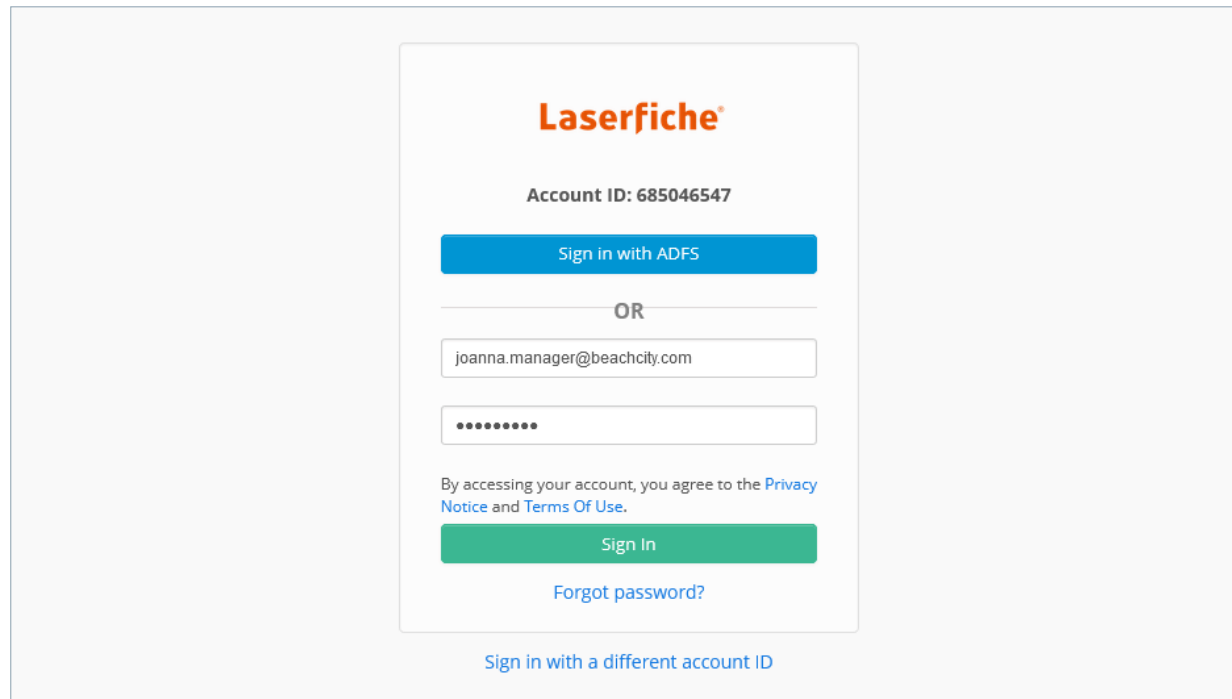
To learn more, watch the video: [Comparing the Laserfiche Windows and Web Clients](#)



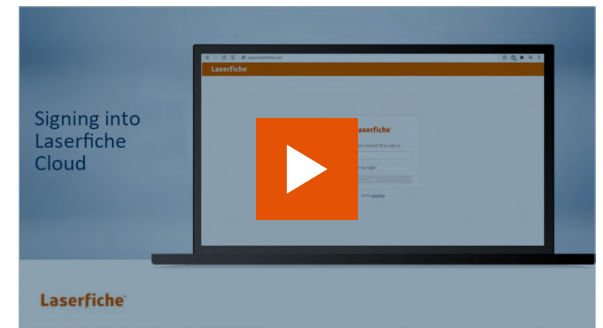
For information on the Laserfiche mobile app, download the [Getting Started with the Laserfiche App Guide](#).

Signing Into Laserfiche Cloud

If you are signing into Laserfiche Cloud, you will first need to type in the Account ID assigned to your organization. You will then sign in with either single-sign on – which is your existing Windows password, or with a specific username and password provided to you by your IT department. If you select “Remember this account” then you will no longer be prompted to type in the Account ID next time you navigate to the sign in page.



Signing Into Laserfiche Cloud



To learn more, watch the video:
Signing into Laserfiche Cloud



For more information about signing into Laserfiche Cloud, read the [Laserfiche product documentation](#).

Signing Into a Self-Hosted Laserfiche System

When you are signing into a self-hosted Laserfiche system, you do not have to provide an Account ID. You have the option of signing in using Windows Authentication or a username and password provided to you by your IT department. Your IT department or department manager will tell you which login method to use.



More information about signing into a self-hosted Laserfiche system can be found on [this page in the product documentation](#).

Laserfiche User Interface Overview

Home Screen

Once you sign in to Laserfiche Cloud, you will be greeted with the Home Screen. This screen is a centralized dashboard that displays any of your active tasks, starred documents, saved searches and more.

The screenshot shows the Laserfiche Cloud Home Screen for user Joanna Manager. The interface includes a navigation bar with tabs for Home, Documents, Tasks, Reports, and Submit Forms. Below the navigation bar, there are several summary cards and detailed sections:

- My Tasks This Week:** 1 New, 1 Completed.
- My Active Tasks:** 1 My Active Tasks.
- Open Team Tasks:** 0 Open Team Tasks.
- Starred Documents:** 4 Starred Documents.
- My Active Tasks Table:**

Name	Date Assigned	Details
Review Request	4/20/2023	Joanna - Samp...
- Starred Documents Table:**

Name	Date Modified
Laserfiche Cloud Overview	9/23/2021
Accounting eLearning Course	4/22/2021
NDA Review Guidelines	2/3/2021
Updated Holiday Leave Policy	2/17/2020
- Document Searches:** Search Repository, Saved Searches (Job Applications - L...).
- Forms:** Admin Tasks, Automate - Beach City Hiring Process, Beach City Hiring Process, Cornerstone Upload Request, Course Review - Getting Started with Workf..., Customer Service Request, Digitize - Beach City Hiring Process, ERP System, JL - Professional Development Request.
- Recent Documents Table:**


Name	Date Modified
Application - Bruce, Mikayla	2/23/2023
Application - Holcomb, Nell	2/23/2023
- My High-Priority Tasks:** You do not have any high-priority tasks.

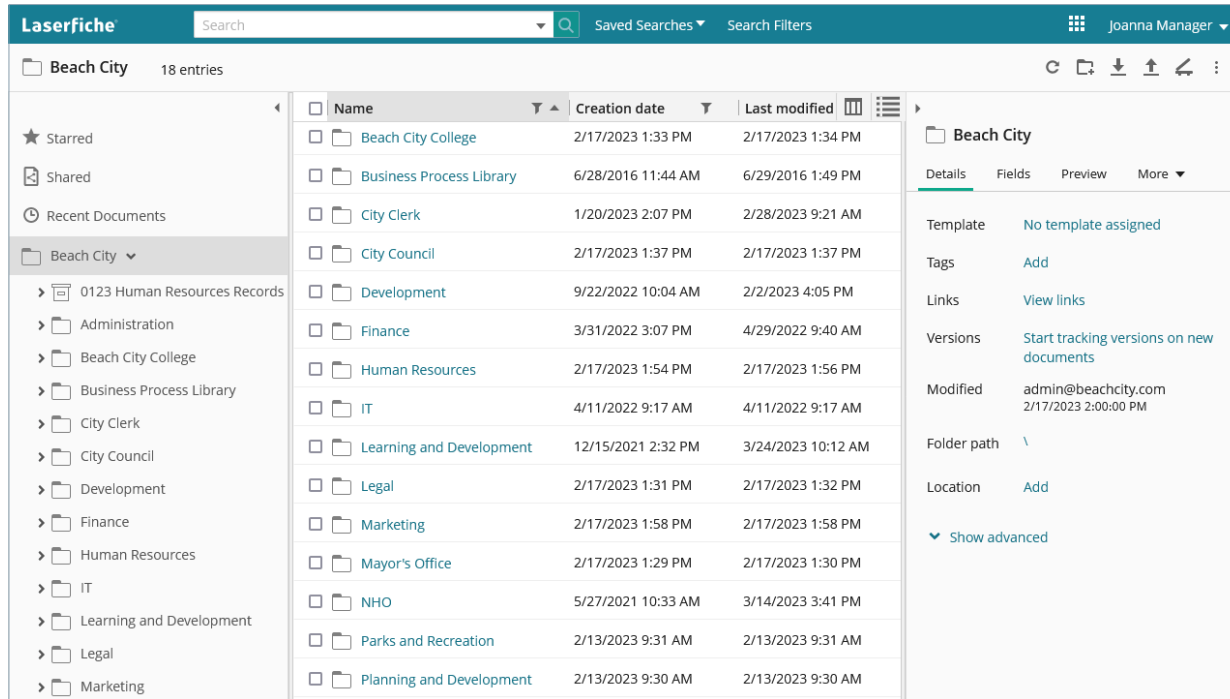
Laserfiche Cloud Home Screen

The thumbnail shows a video player interface with a play button in the center. The video title is "Overview of the Home Screen".

To learn more, watch the video:
Overview of the Home Screen

Repository

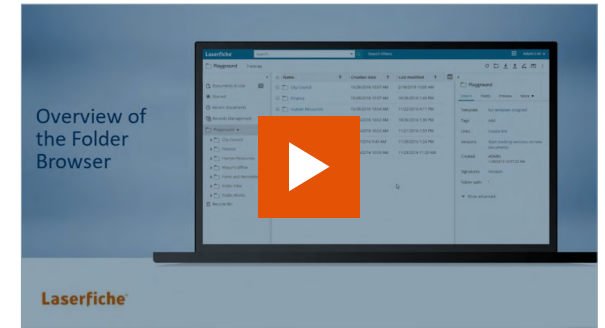
To access your document repository, you can click the app picker () and select the repository name from the Repository section of the list. This will take you to the folder browser. If you are using the Laserfiche web client with a self-hosted system, then you'll be presented with the folder browser right after signing in to Laserfiche.



The screenshot shows the Laserfiche web client interface. At the top, there is a search bar and navigation options. The main area displays a folder browser for 'Beach City' with 18 entries. The entries are listed in a table with columns for Name, Creation date, and Last modified. The folders include: Beach City College, Business Process Library, City Clerk, City Council, Development, Finance, Human Resources, IT, Learning and Development, Legal, Marketing, Mayor's Office, NHO, Parks and Recreation, and Planning and Development. A sidebar on the left shows a navigation tree with 'Beach City' selected. On the right, there is a details panel for the selected folder, showing metadata such as Template, Tags, Links, Versions, Modified, Folder path, and Location.

Name	Creation date	Last modified
Beach City College	2/17/2023 1:33 PM	2/17/2023 1:34 PM
Business Process Library	6/28/2016 11:44 AM	6/29/2016 1:49 PM
City Clerk	1/20/2023 2:07 PM	2/28/2023 9:21 AM
City Council	2/17/2023 1:37 PM	2/17/2023 1:37 PM
Development	9/22/2022 10:04 AM	2/2/2023 4:05 PM
Finance	3/31/2022 3:07 PM	4/29/2022 9:40 AM
Human Resources	2/17/2023 1:54 PM	2/17/2023 1:56 PM
IT	4/11/2022 9:17 AM	4/11/2022 9:17 AM
Learning and Development	12/15/2021 2:32 PM	3/24/2023 10:12 AM
Legal	2/17/2023 1:31 PM	2/17/2023 1:32 PM
Marketing	2/17/2023 1:58 PM	2/17/2023 1:58 PM
Mayor's Office	2/17/2023 1:29 PM	2/17/2023 1:30 PM
NHO	5/27/2021 10:33 AM	3/14/2023 3:41 PM
Parks and Recreation	2/13/2023 9:31 AM	2/13/2023 9:31 AM
Planning and Development	2/13/2023 9:30 AM	2/13/2023 9:30 AM

Laserfiche repository folder browser

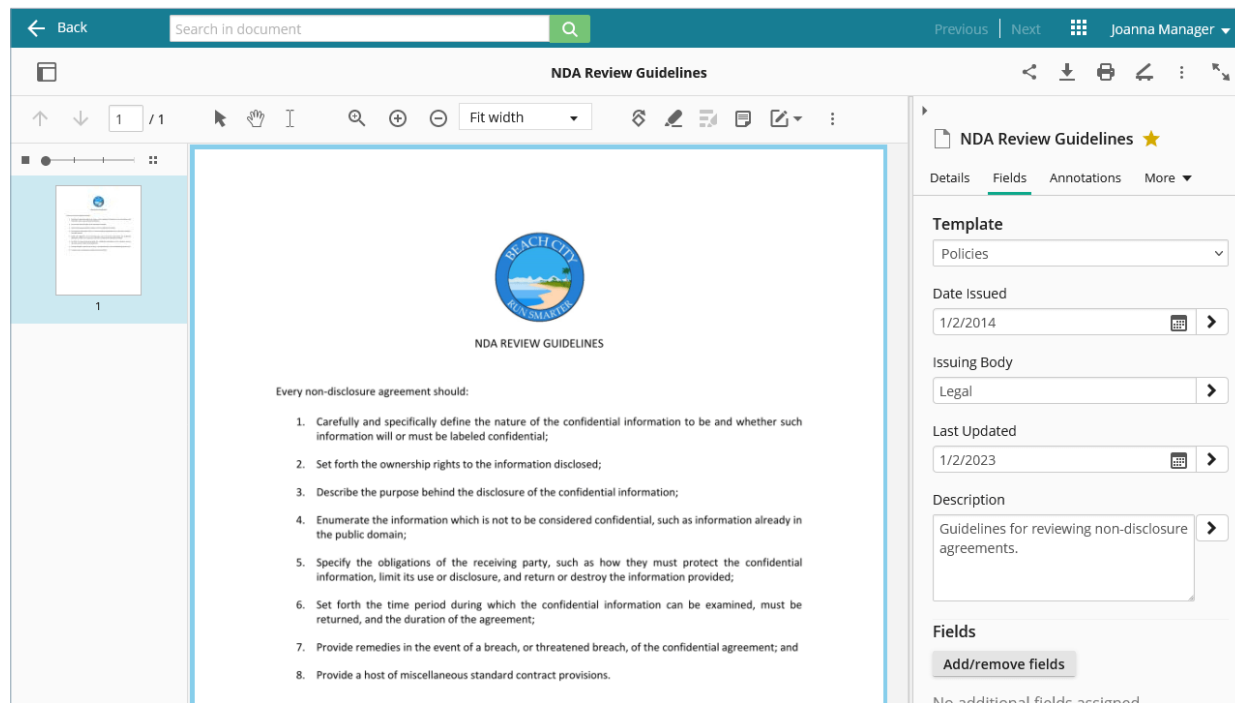


To learn more, watch the video:

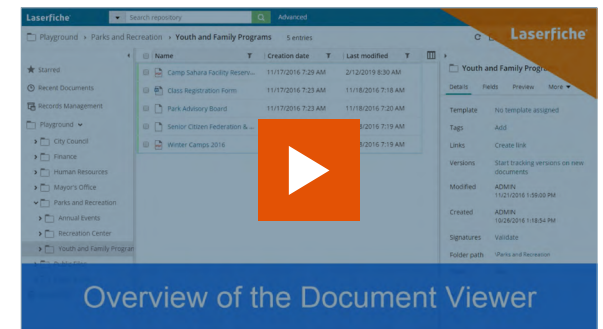
Overview of the Folder Browser

In the repository, you will find numerous documents. Some documents will be in the form of electronic files, such as PDFs or Microsoft Office documents. If you click on an electronic file, it will open in its native application. The only exception are PDFs which open in a Laserfiche PDF viewer, by default, and Microsoft Office documents that will open in the document viewer. You can also choose to open PDF files in your computer’s native PDF reader application, by electing to edit the file when prompted in the web client.

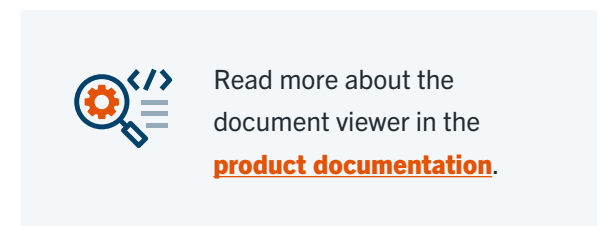
Other file types stored in Laserfiche are imaged files, known as TIFF files. Those files open directly in the Laserfiche document viewer.



The Laserfiche document viewer



To learn more, watch the video:
Overview of the Document Viewer





Getting Documents into Laserfiche

- Import/Drag and Drop
- Microsoft Office Integration
- Laserfiche Snapshot
- Laserfiche Scanning

You can add new documents into Laserfiche in a variety of ways.

Some of the most common include:

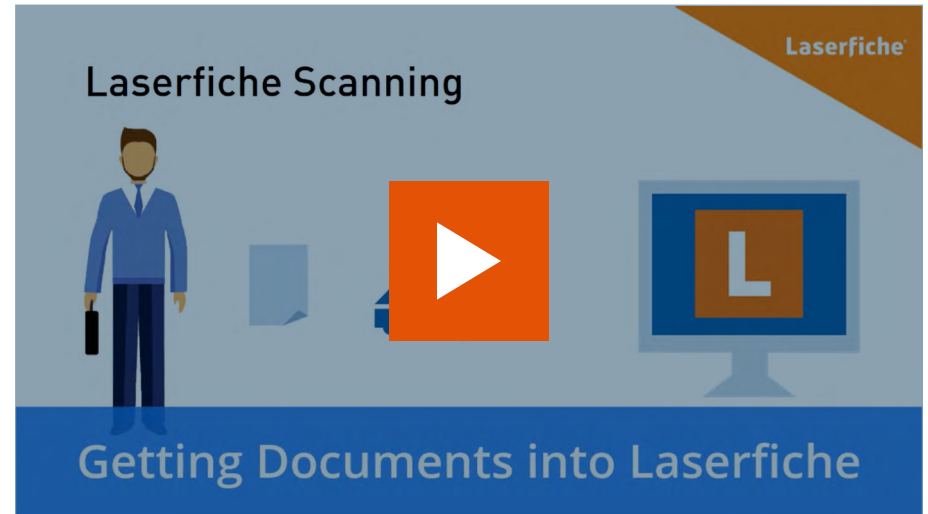
- Import/Drag and Drop
- Microsoft Office Integration
- Laserfiche Snapshot
- Laserfiche Scanning

Import/Drag and Drop

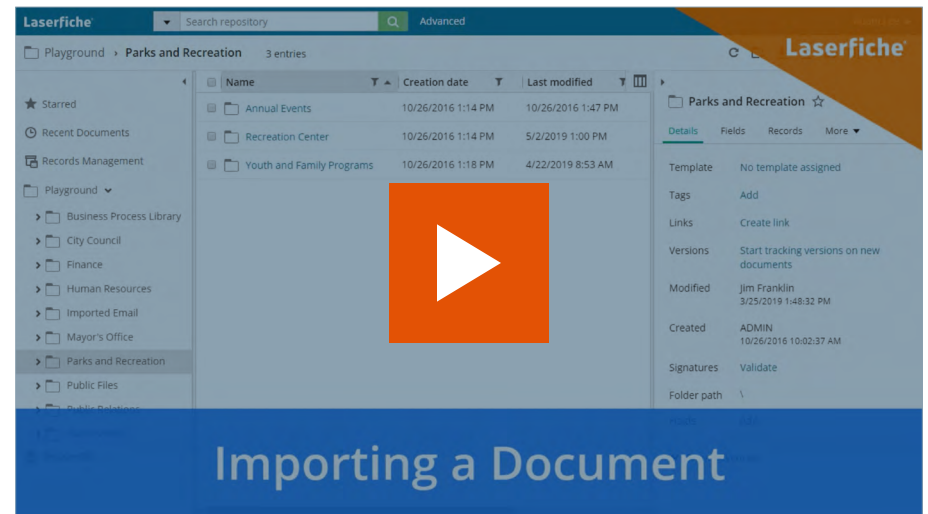
You can drag and drop, or import digital documents into the repository from your computer. This method works well for ad hoc document imports. When you import image files, they will be made into pages in a Laserfiche document, which allows you to use Laserfiche annotations with them. When you import non-image files, such as Microsoft Office documents, they will remain in their original formats. When you import a PDF, it will be converted to pages that you can annotate, but your original PDF will be retained in the document as well.



Learn more about various methods of adding documents and folders to Laserfiche in the [product documentation](#).



To learn more, watch the video: [Getting Documents into Laserfiche](#)



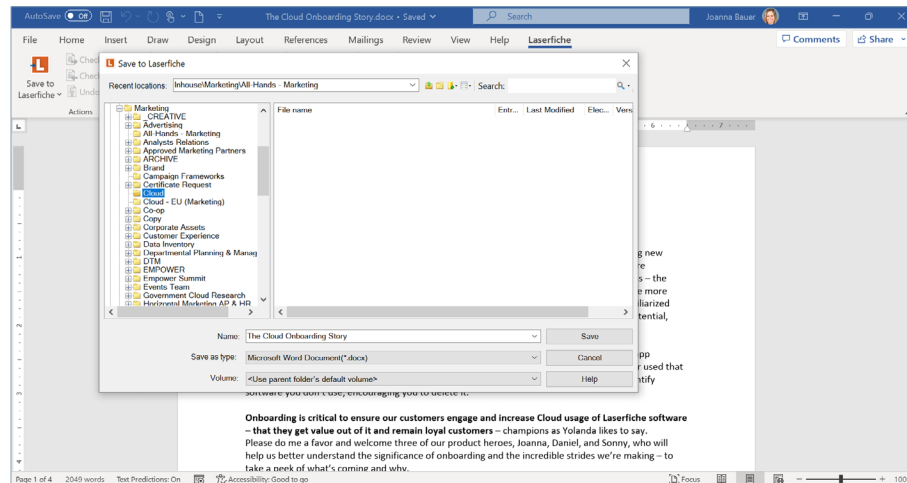
To learn more, watch the video: [Importing a Document](#)

Microsoft Office Integration

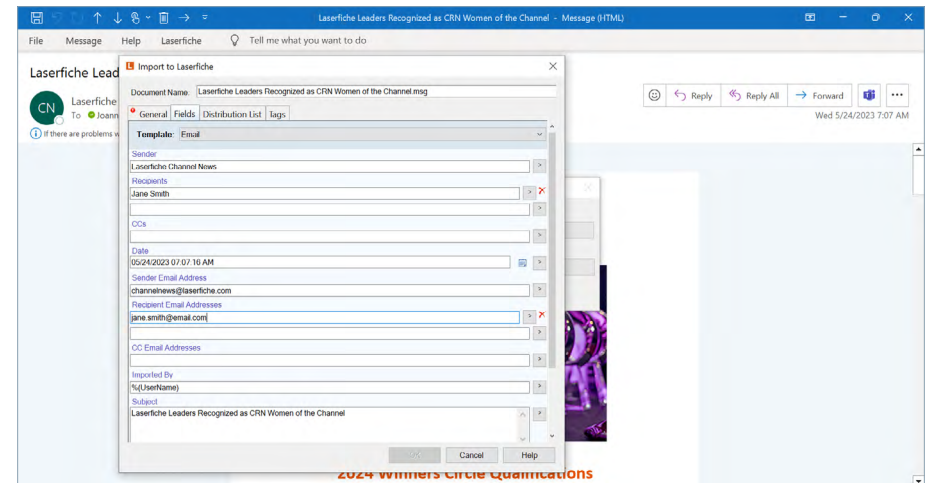
You can import Microsoft Office documents and populate metadata (Word, Excel, and PowerPoint) directly from within the application using the Microsoft Office integration. This integration is very useful if you spend a lot of time creating and editing Office documents.

Additionally, this integration allows you to:

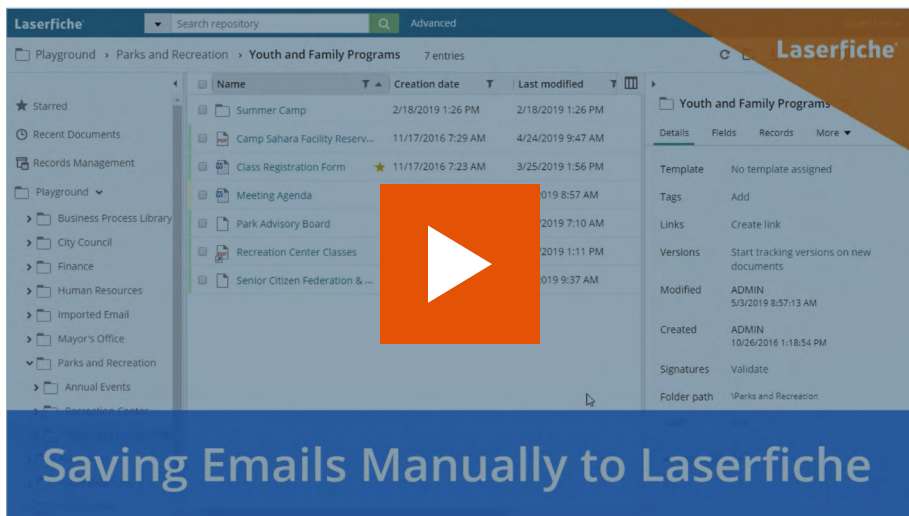
- Create a new Microsoft Office document from within the folder browser, so you don't have to open a separate application.
- Import emails and/or their attachments using the Laserfiche Outlook integration with appropriate metadata applied automatically. You can also drag and drop emails from Outlook directly into Laserfiche. This is very useful if you need to save emails alongside related documents, such as all correspondence related to a specific project.



Saving a document into a Laserfiche repository from the Laserfiche toolbar in Microsoft Word

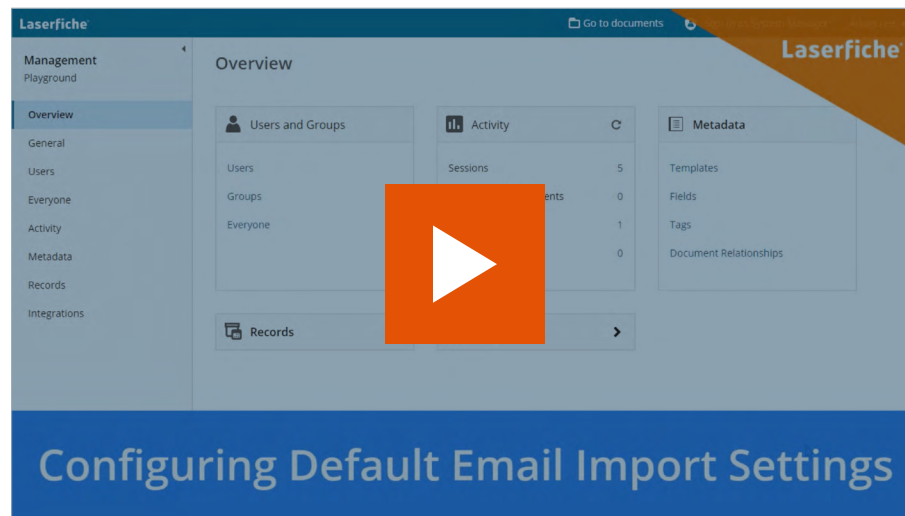


Saving an email into the repository from the Laserfiche toolbar in Microsoft Outlook



Saving Emails Manually to Laserfiche

To learn more, watch the video: [Saving Emails Manually to Laserfiche](#)



Configuring Default Email Import Settings

To learn more, watch the video: [Configuring Default Email Import Settings](#)



Find more information about the Microsoft Office integration in the [product documentation](#).

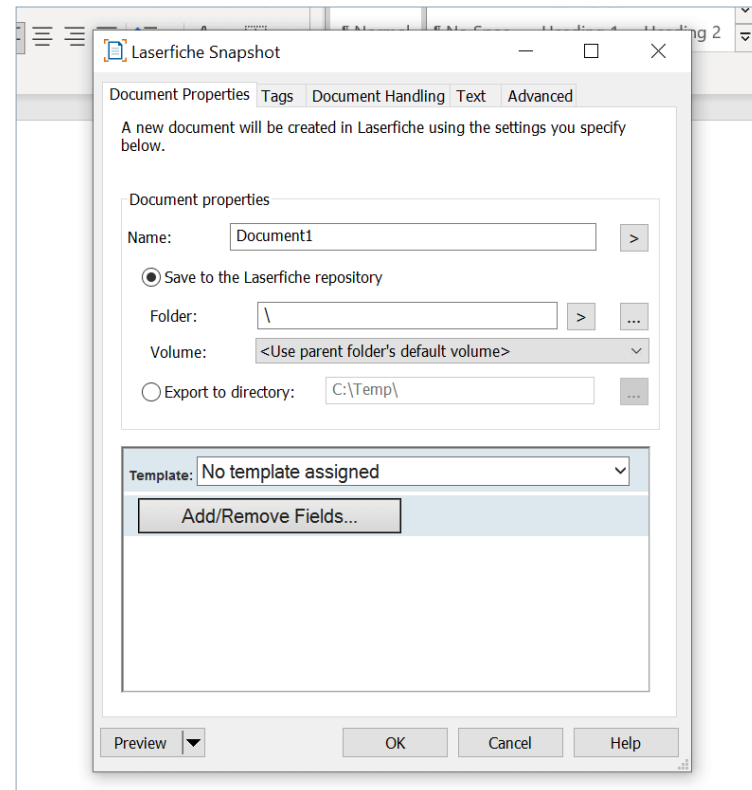
Laserfiche Snapshot

You can print websites or other digital documents into Laserfiche as a TIFF image using the Laserfiche Snapshot printer.

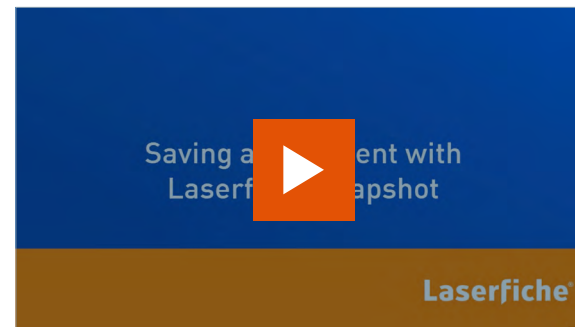
Laserfiche Snapshot is a great tool for:

- Archiving documents
- Saving copies of webpages
- Sharing unalterable copies and unsupported file types with others
- Appending pages to existing documents

During printing, you can specify the correct folder where the document should be saved, and add any metadata. If your administrator has set up Snapshot, it should be available from your list of printers when you open the Print option within your application.



The Laserfiche Snapshot printer




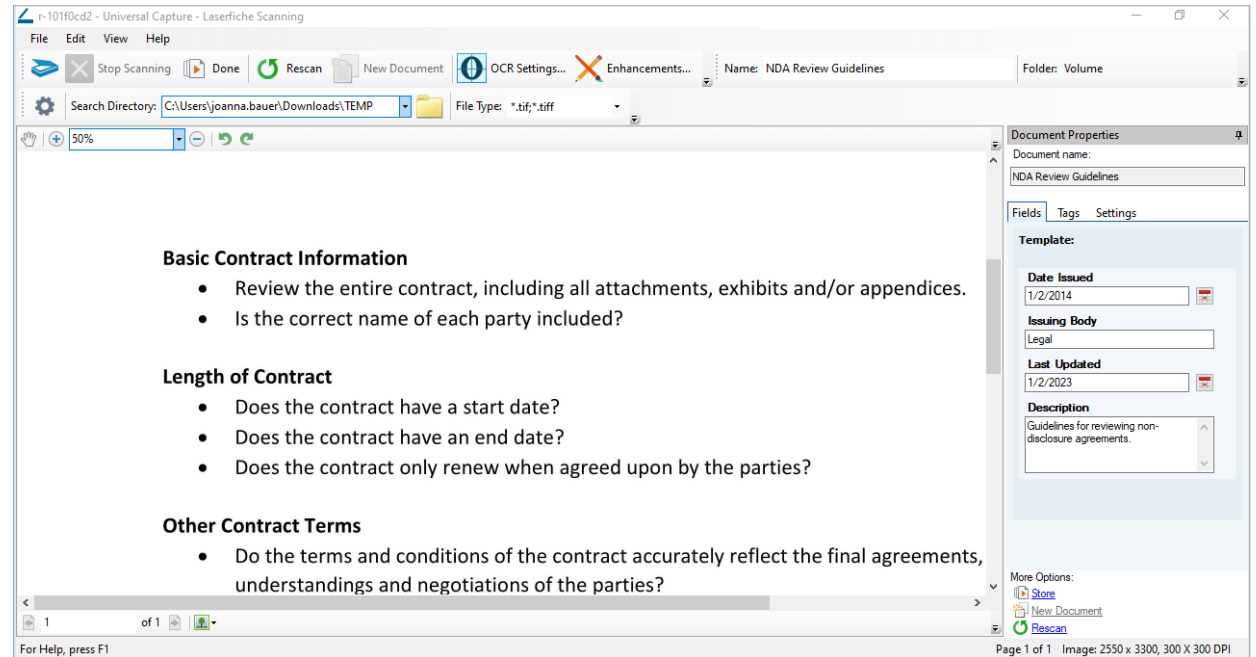
To learn more, watch the video: Saving a Document with Laserfiche Snapshot

Laserfiche Scanning

If you have paper documents that need to be scanned into Laserfiche, you can use Laserfiche Scanning.

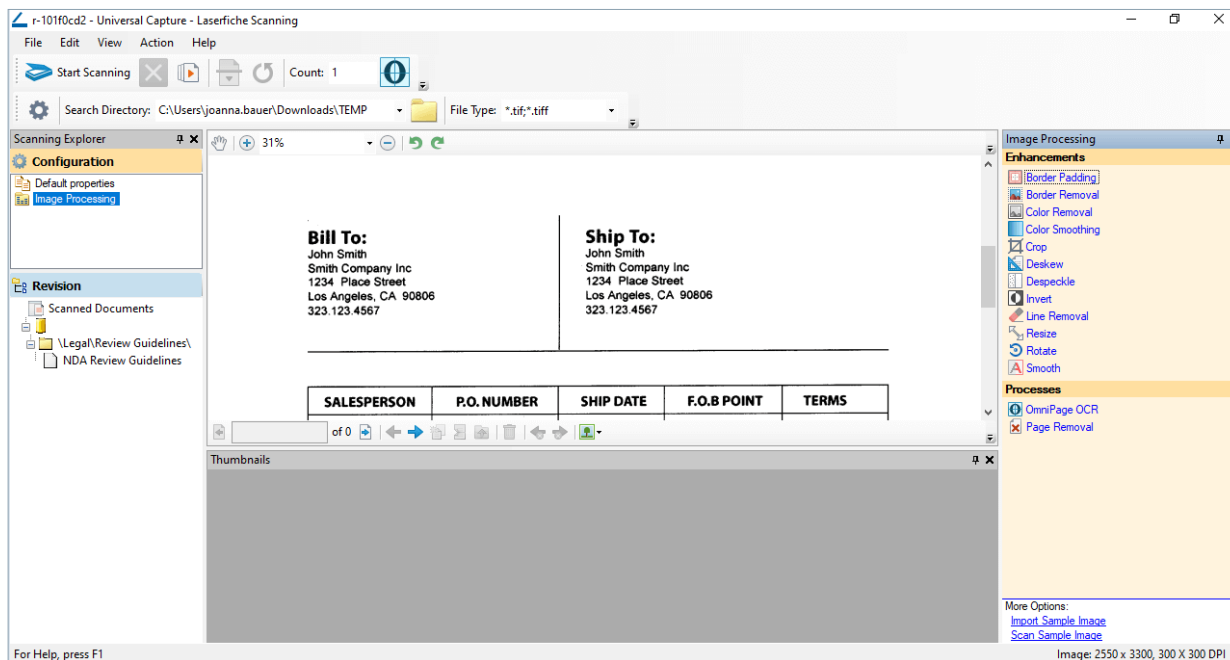
Step-by-step guide:

1. Navigate to where you want the document stored and then press the scanner icon in the toolbar (). This will launch the Laserfiche Scanning module.
2. From there, you can select either:
 - **Web Scanning:** Best for scanning multiple documents in your browser, without opening a separate application
 - **Laserfiche Basic Scanning:** Best for scanning one document at a time with basic enhancements
 - **Laserfiche Standard Scanning:** Best for scanning a batch of documents



The Laserfiche Basic Scanning interface

3. Once you open a particular scanning module, you can scan from your hard drive or network drive. You can also capture and process electronic documents through scanning by selecting Universal Capture as the scan source.
4. During scanning, you can populate the document's metadata, split the document into multiple documents, perform OCR on the document and add different enhancements (such as rotate pages, remove lines or blank pages, or despeckle the image).



The Laserfiche Standard Scanning interface



Learn more about Laserfiche scanning by taking the [Laserfiche Scanning eLearning Curriculum and Certification Course](#) in Laserfiche Aspire.

Working With Documents in Laserfiche

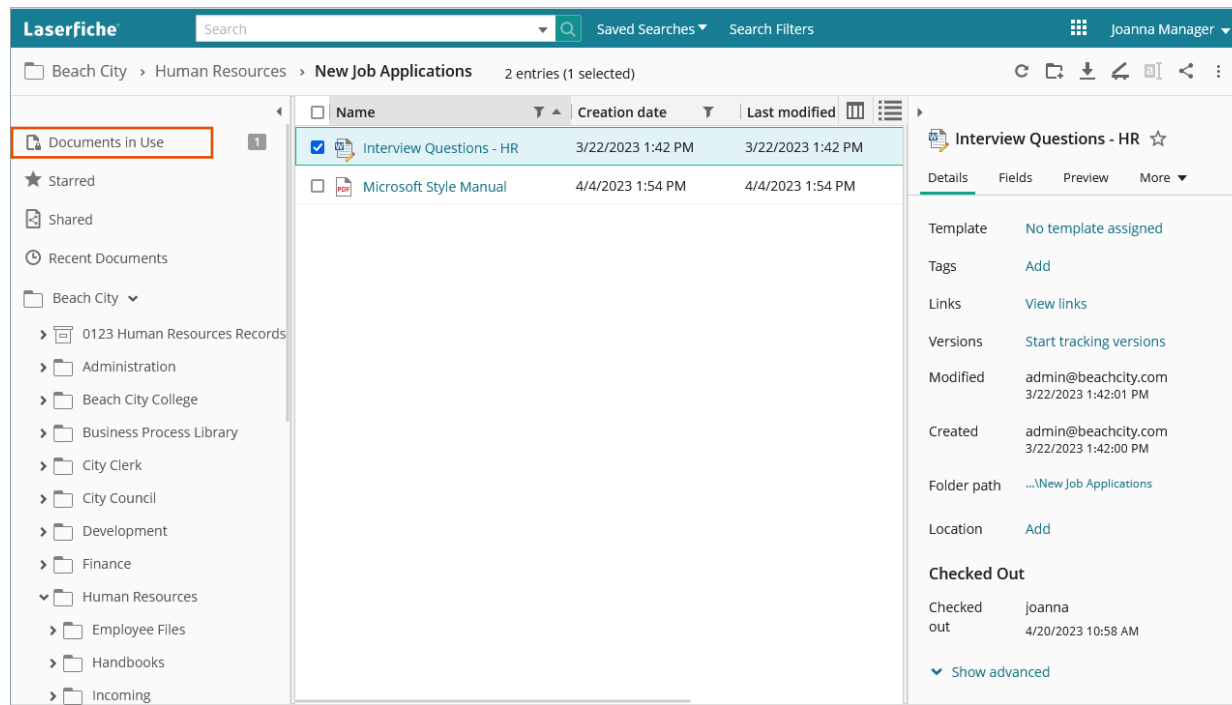
- Checking Out / Checking In Documents
- Working with Microsoft Office Documents
- Versioning Documents
- Quickly Accessing Documents or Folders
- Sharing Documents
- Viewing and Editing Metadata
- Annotating Imaged Documents
- Organizing Documents and Folders
- Searching

Checking Out/Checking In Documents

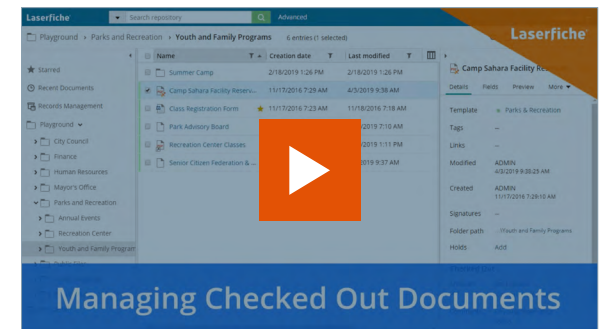
In order to make sure no one makes edits to the same document as you at the same time, you can use the Check Out/Check In option. Check out an electronic document when you are ready to work on it and check it back in when you are done. When a document is checked out, it is locked to all other users for editing.

An electronic document is checked out automatically when you select that you want to edit it with the desktop version of Microsoft Office, or the relevant software. You can also right-click on the document and select Open – Download and Check Out.

Selecting the Documents in Use option in the upper left-hand corner of the Folder Browser screen allows you to see all of your currently checked out documents.



The Documents in Use menu in the web client



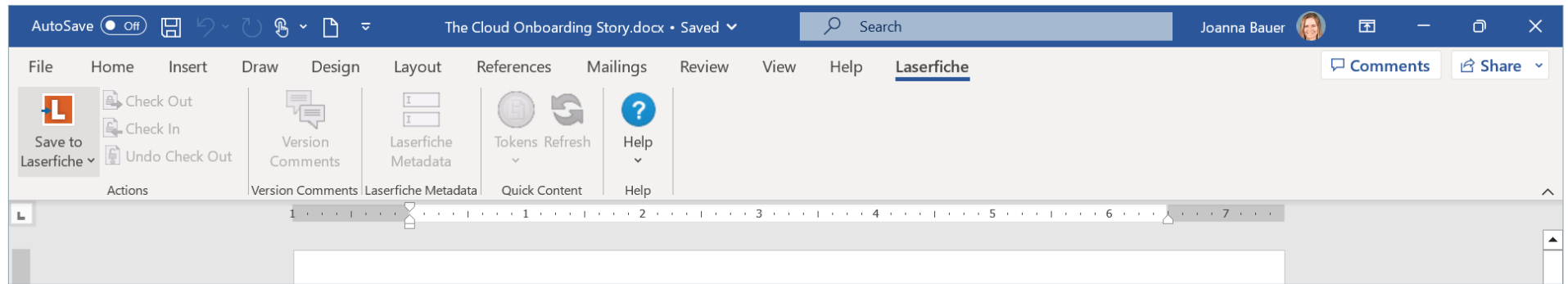
To learn more, watch the video:
Managing Checked Out Documents

Working with Microsoft Office Documents

You can simplify working with Microsoft Word, Excel, and PowerPoint documents by using the Laserfiche toolbar within each application.

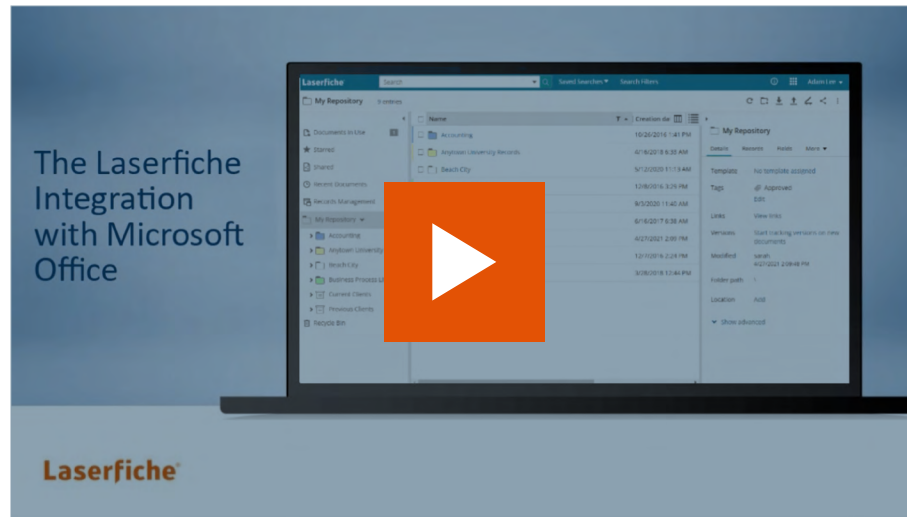
This toolbar allows you to:

- Check the document in or out
- Store the document in Laserfiche
- View the document's versions
- View or modify the document's metadata

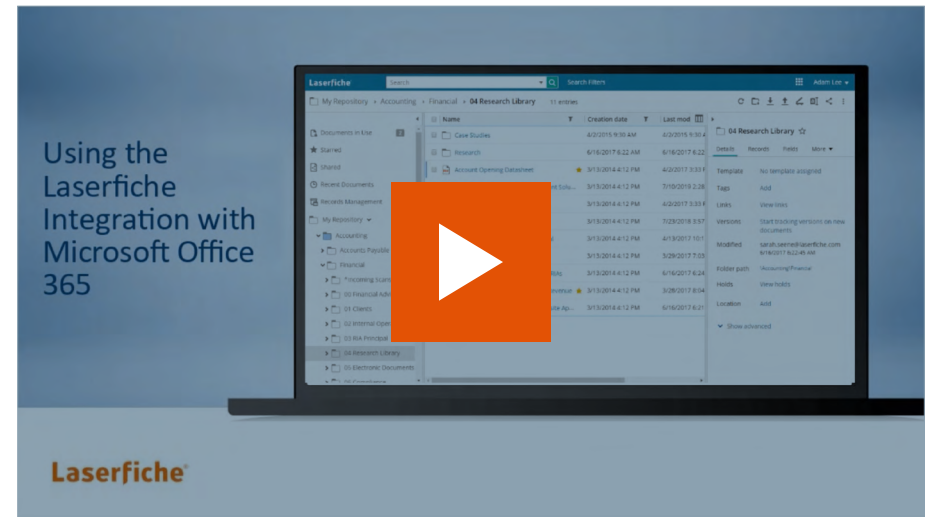


The Laserfiche toolbar makes working with Microsoft documents easy

If your organization has Microsoft Office Web Apps Server implemented, you can configure Laserfiche to allow you to edit Office documents directly in the document viewer. You can also enable simultaneous co-authoring to allow multiple users to edit the same document at once.



To learn more, watch the video: [The Laserfiche Integration with Microsoft Office](#)



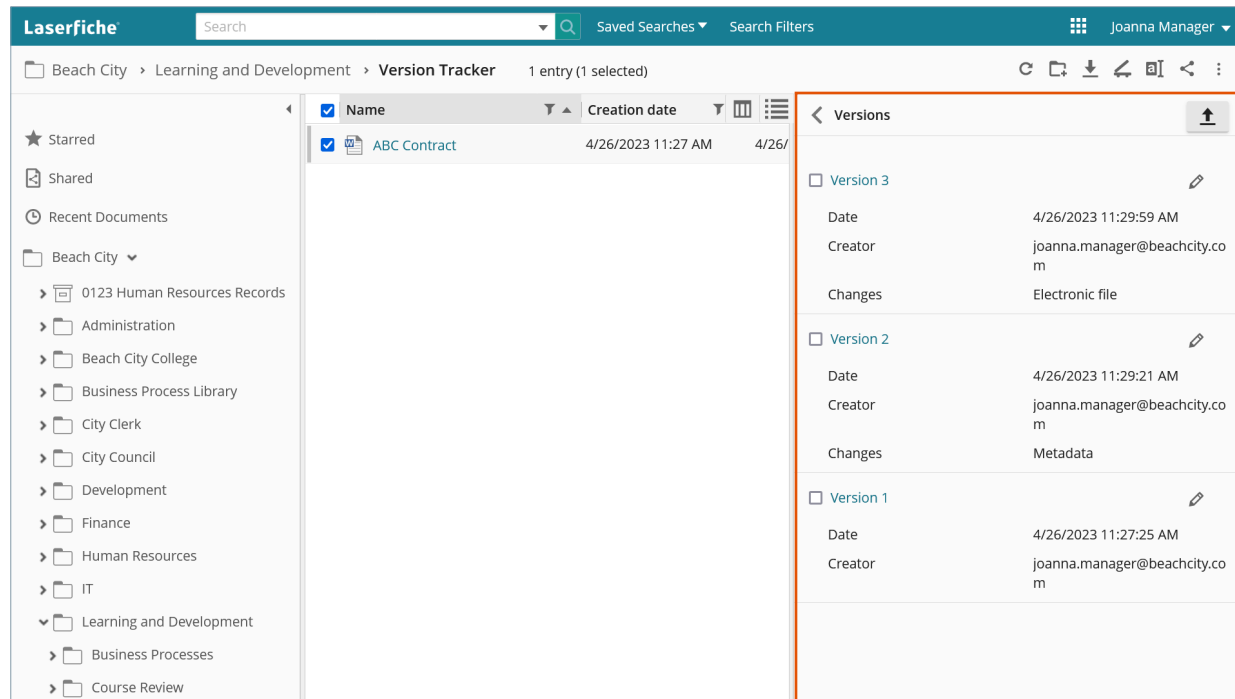
To learn more, watch the video: [Using the Laserfiche Integration with Microsoft Office 365](#)



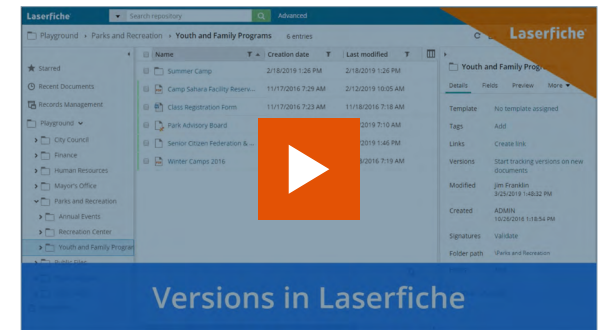
More information about this can be found in the [product documentation](#).

Versioning Documents

Laserfiche allows users to apply version control to any document or folder. When a document is under version control, all changes to the document text, annotations, and metadata are tracked and saved as different versions. You can also view the version history, the differences between versions or revert to an older version from within the Versions section of the document's Details pane. When a folder is placed under version control, any new documents created in that folder will automatically also be placed under version control.

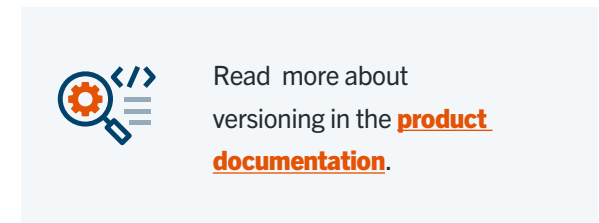


The versions section of the Details pane



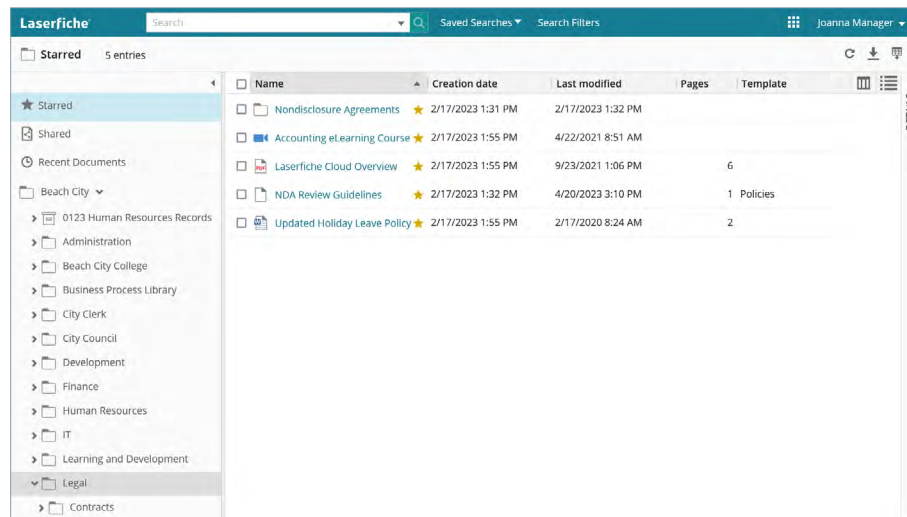
To learn more, watch the video:

[Versions in Laserfiche](#)

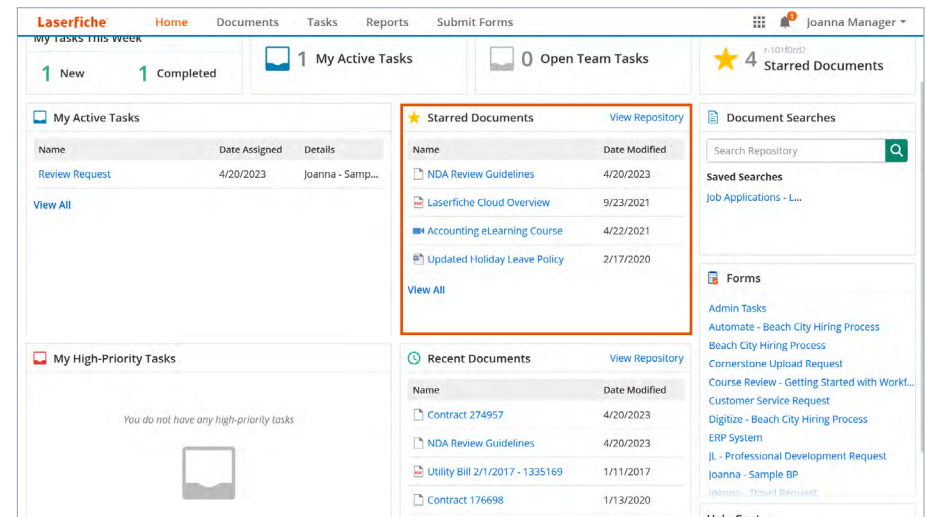


Quickly Accessing Documents or Folders

You can add a star to any document or folder, and view them from the Starred menu for quick access. In Laserfiche Cloud, you can also view starred documents from the Home Screen. To add a star to a folder or document, right click the entry and select Add Star.

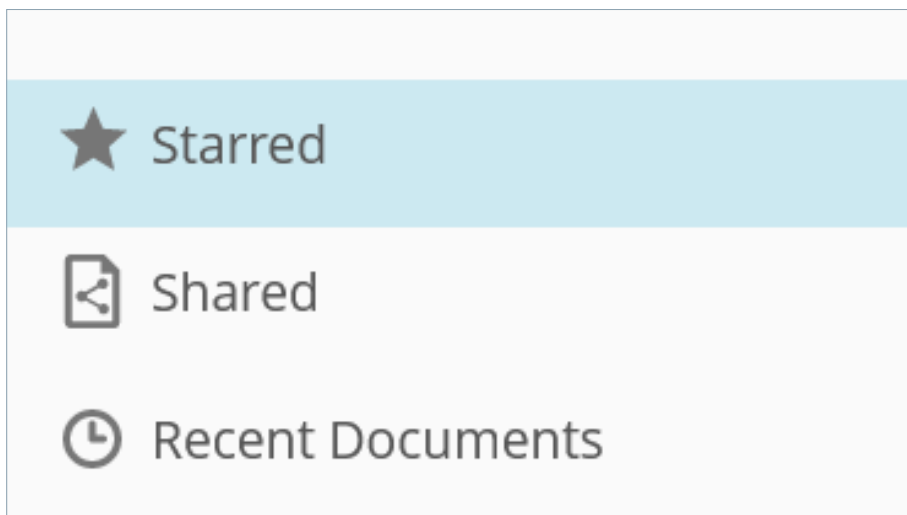


Viewing starred entries in the folder browser

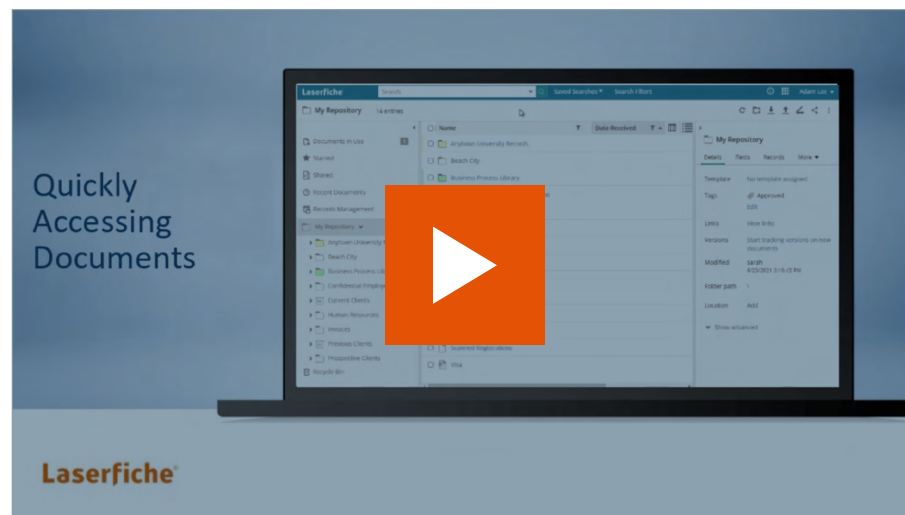


Starred documents section on the Home Screen

Another way of quickly accessing the documents is the Recent Documents section in the folder browser.



The Recently Opened Documents menu in the web client simplifies document access



To learn more, watch the video: [Quickly Accessing Documents](#)

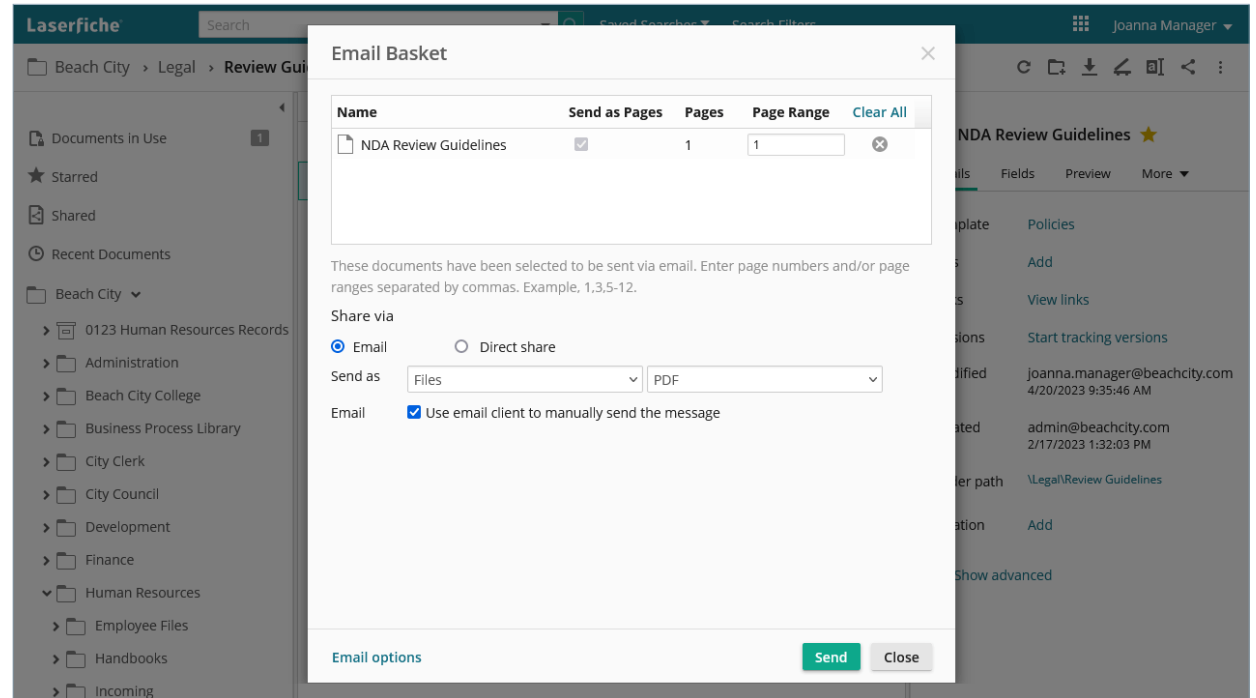
Sharing Documents

You can easily share documents with other Laserfiche users by emailing a link to the document in Laserfiche. If you would like to send the document to a user who does not have Laserfiche, you can also email a copy of the document directly from within Laserfiche. You can also send a document to an external user using Direct Share.

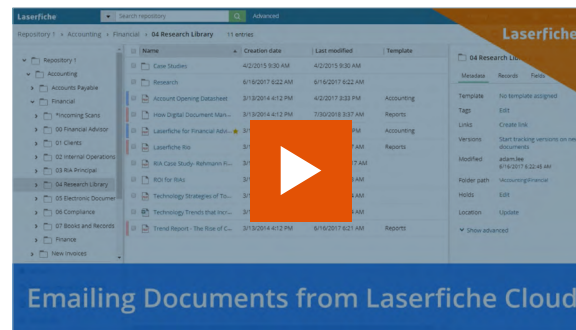
To share a document, right-click on the document and select Share. From there, you have the option of sharing via email or Direct Share.

Sharing via Email

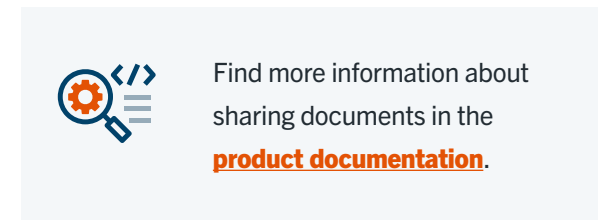
If selecting email, you have the option of sending the file as an attachment, or as a link to Laserfiche. You can configure the email details directly within the Email Basket dialog box, or check the Use email to manually send the message option to finish composing the email in Microsoft Outlook.



Emailing a document from the Web client

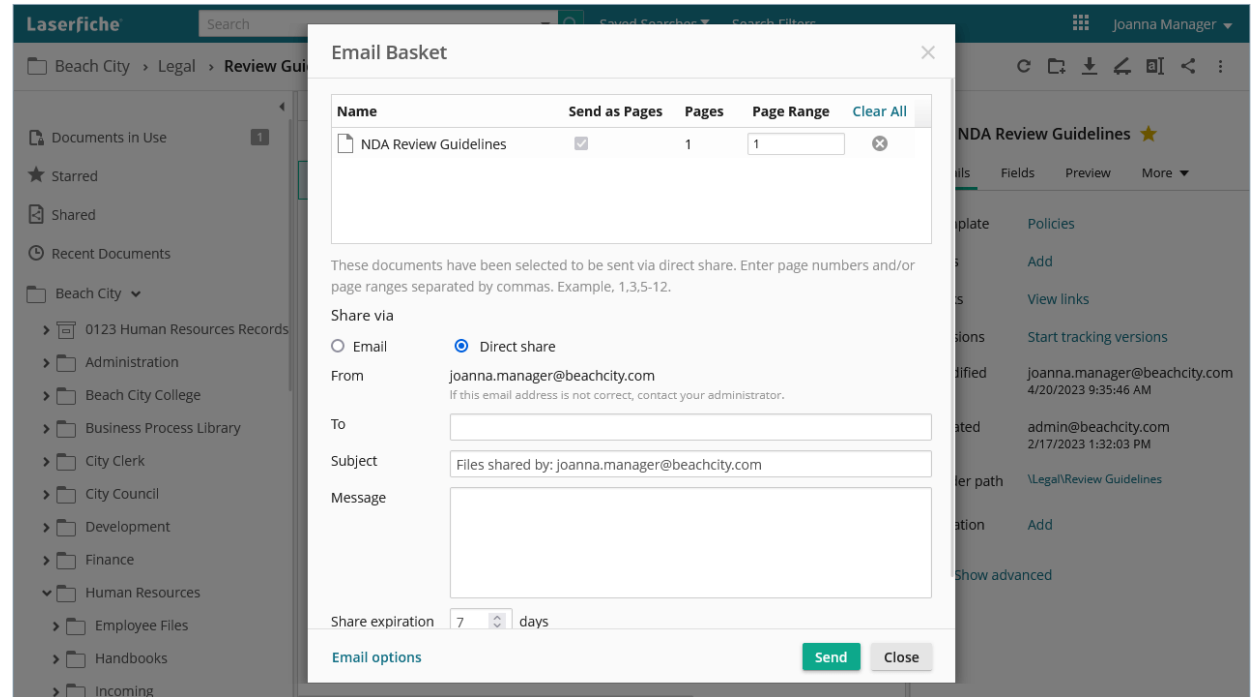


To learn more, watch the video:
Emailing Documents in Laserfiche

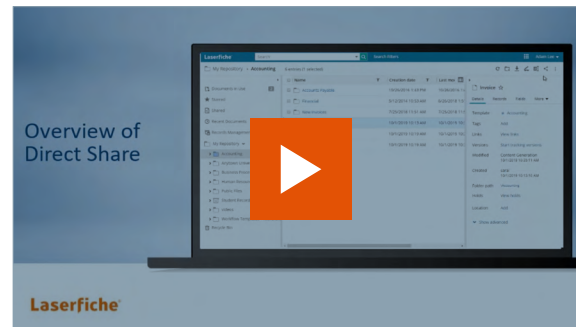


Sharing via Direct Share

To share a document via Direct Share, select the Direct Share option. You can then configure the settings for the email that will be sent to the recipient, as well as to set the expiration date on the file. The recipient will receive an email with a link to download the file within a specified number of days. Direct Share is a great option for sending documents such as contracts to customers or student records to students.



Sharing a document via Direct Share

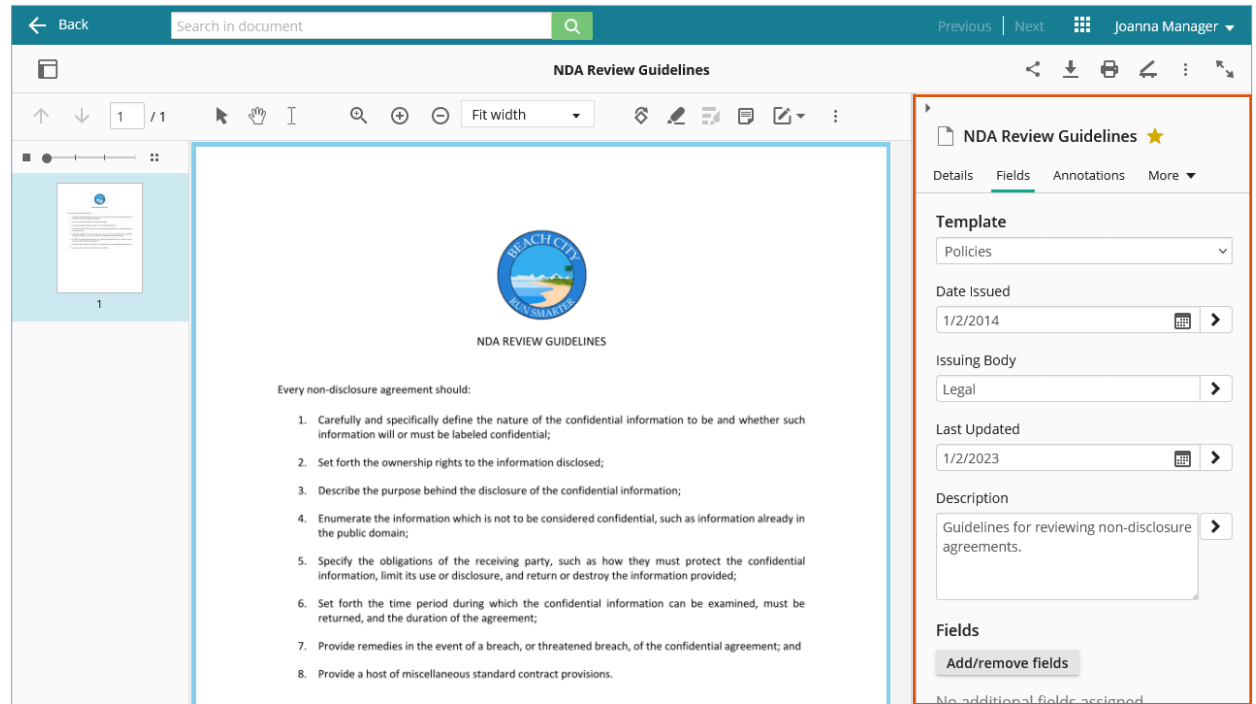


To learn more, watch the video:
[Overview of Direct Share](#)

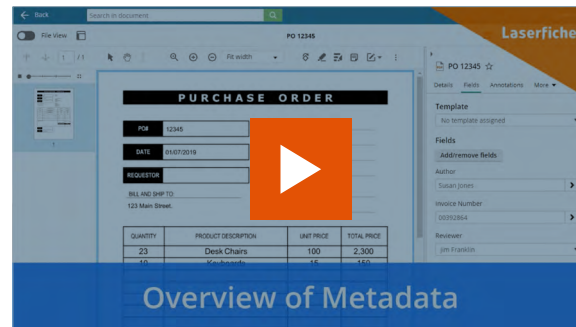
Viewing and Editing Metadata

Documents and folders in Laserfiche usually have metadata associated with them. The most common form of metadata is fields. Fields contain identifying information about the document and can be grouped in templates. Adding fields and templates to documents and folders makes searching for them easier.

You can view all the metadata associated with a document or folder in the Fields tab of the Details pane. In the Fields tab, you can also edit the field values and add or remove new fields.



The templates and fields section of the Details pane in the web client

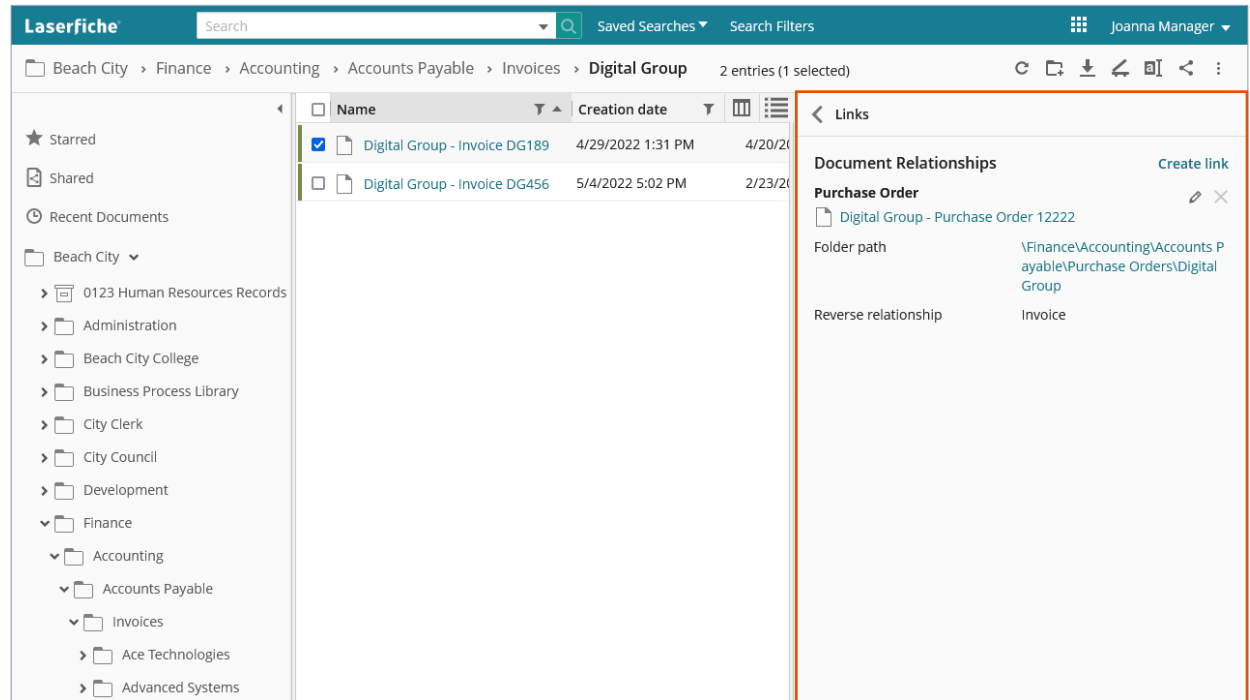


To learn more, watch the video:
[Overview of Metadata](#)

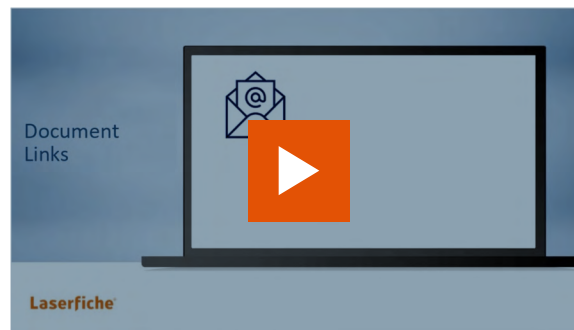
Other common types of metadata include links and tags. There are two types of links:

- **Document relationships:** Allow you to connect two related entries, such as an invoice and a purchase order
- **Link groups:** A group of related documents, such as all contracts for a particular vendor

You can access all document links from the Details tab in the Details pane.

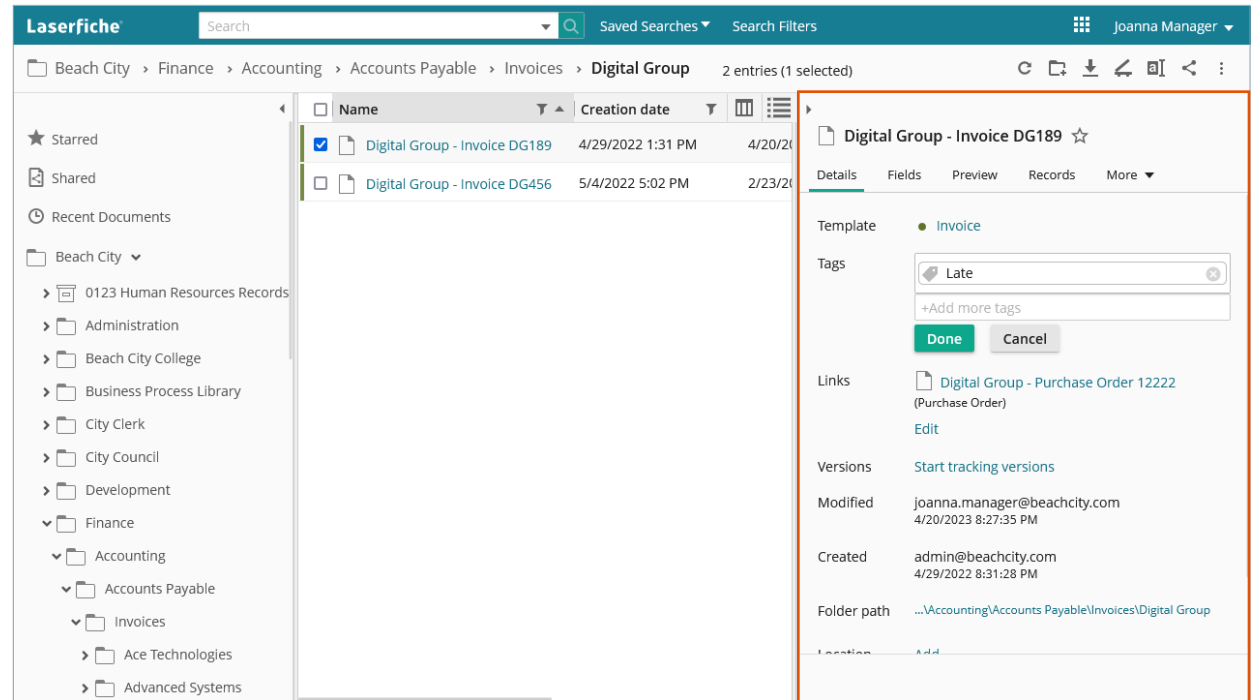


The Links section of the Details pane in the web client

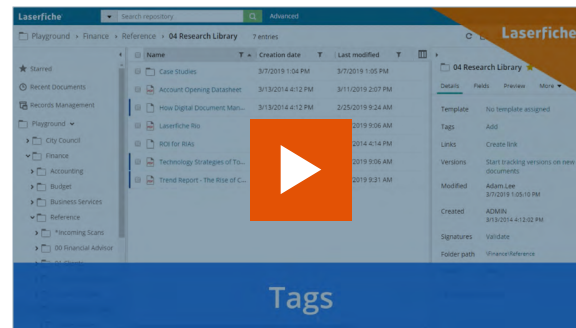


To learn more, watch the video:
Document Links


A tag can be used to categorize documents or folders. For example, you can tag all documents related to a particular project with a project tag. You can view, add, or delete tags in the Details tab of the Details pane. You can also search for all documents with a particular tag.



The Tags section of the Metadata pane in the web client



To learn more, watch the video:
[Tags in Laserfiche](#)



Learn more about working with Laserfiche metadata by downloading the [Getting Started with Laserfiche Metadata Guide](#).

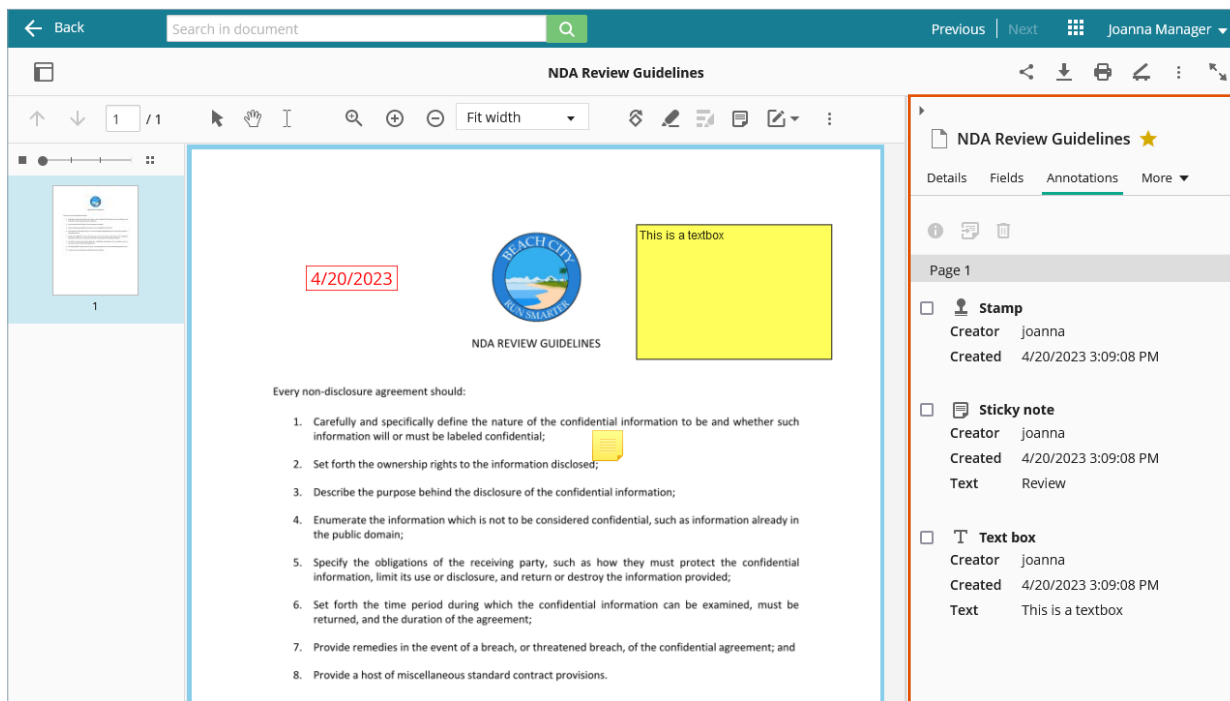
Annotating Imaged Documents

You can add annotations, such as sticky notes, text boxes, highlights or redactions and more to your imaged documents. You can only add annotations to TIFF images or document pages. Annotations are not available for PDFs or other electronic files.

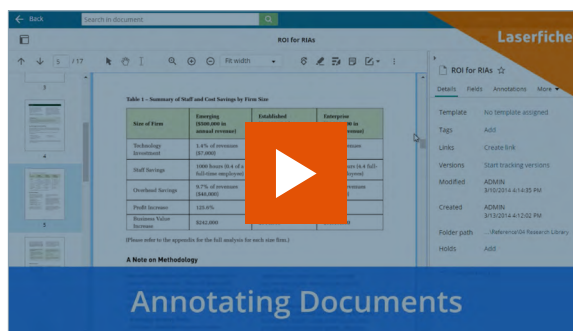
You can view a list of all annotations on a particular document by opening the Annotations pane. From there you can see the details of each annotation. Clicking on an annotation will take you directly to the place in the document where it is located.

Some of the most popular annotation types include:

- Text and Image Stamps
- Sticky Notes
- Text Boxes
- Redactions



The Annotations pane in the web client



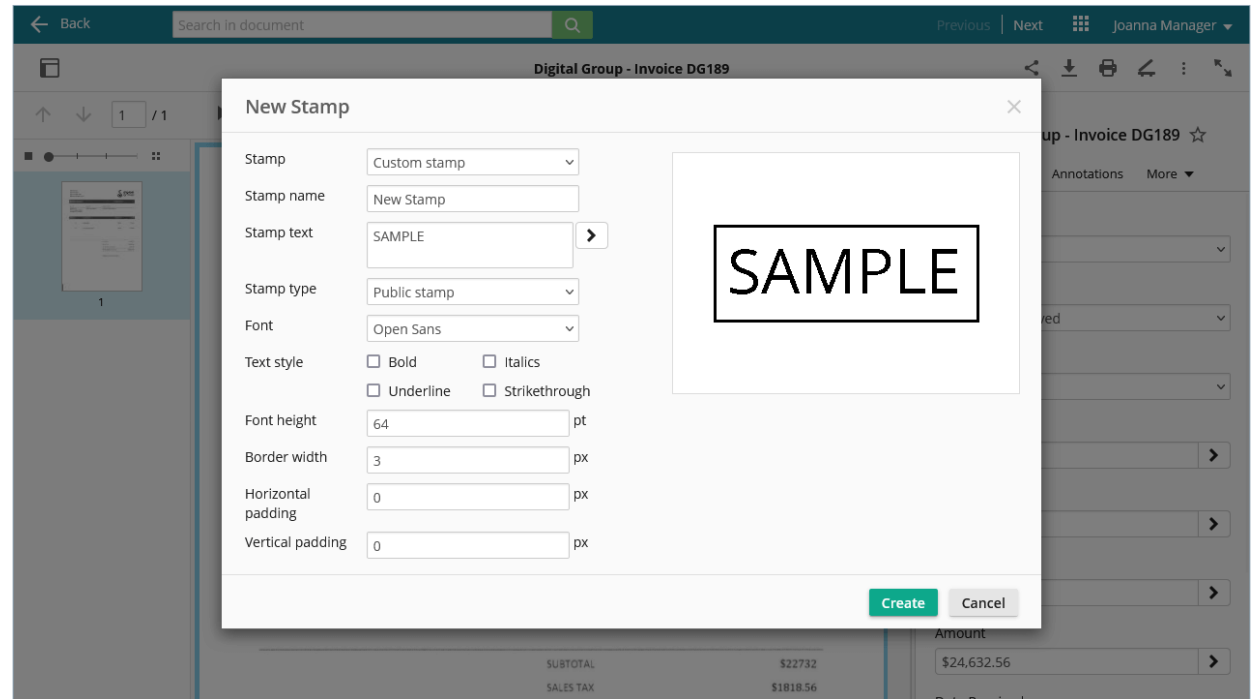
To learn more, watch the video:
Annotating a Document in Laserfiche

Stamps

A stamp is a small image that is overlaid on your document. You can create as many custom stamps as you like. Stamps can be text, an image, or dynamic text.

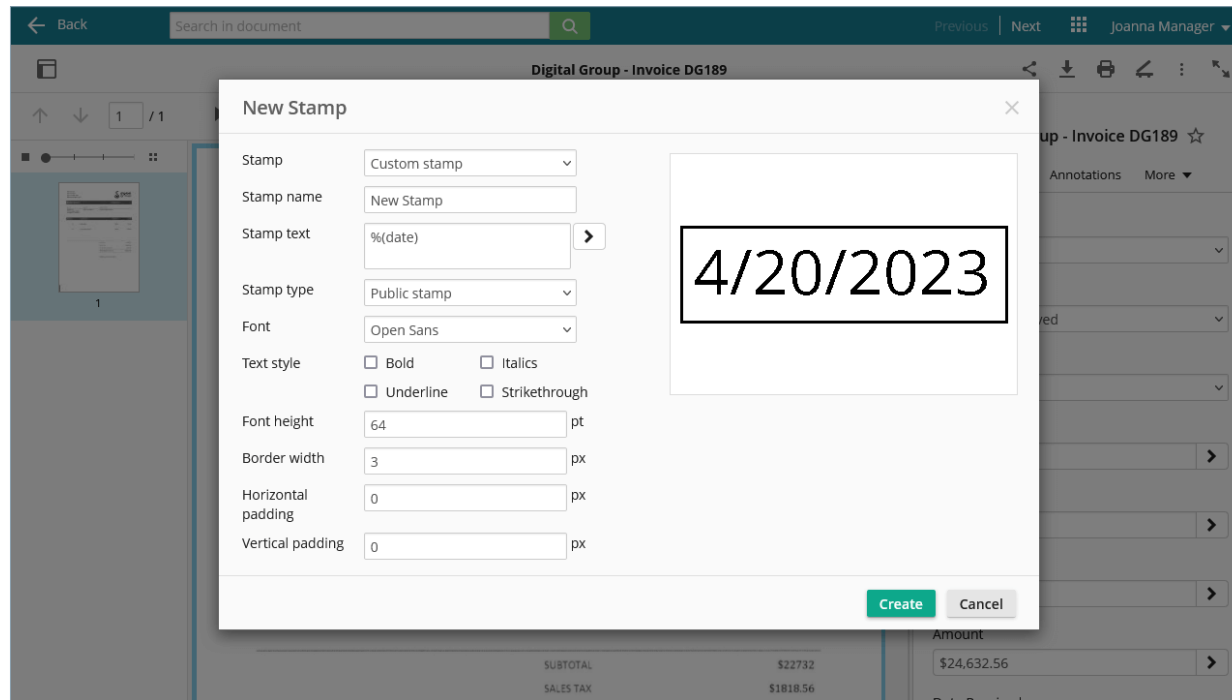
- Public stamps can be used by everyone
- Personal stamps can only be used by you

Once the stamp is applied, the text or image cannot be altered, but the stamp can be dragged to a different location in the document, resized, or deleted.

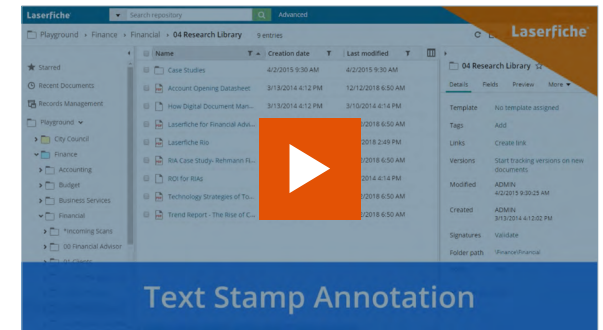


An example of a custom, public stamp in the web client

This is an example of a custom, dynamic stamp. This stamp contains the current date. You can add other variables into your stamp, by selecting the token button (>) next to the Stamp text box.

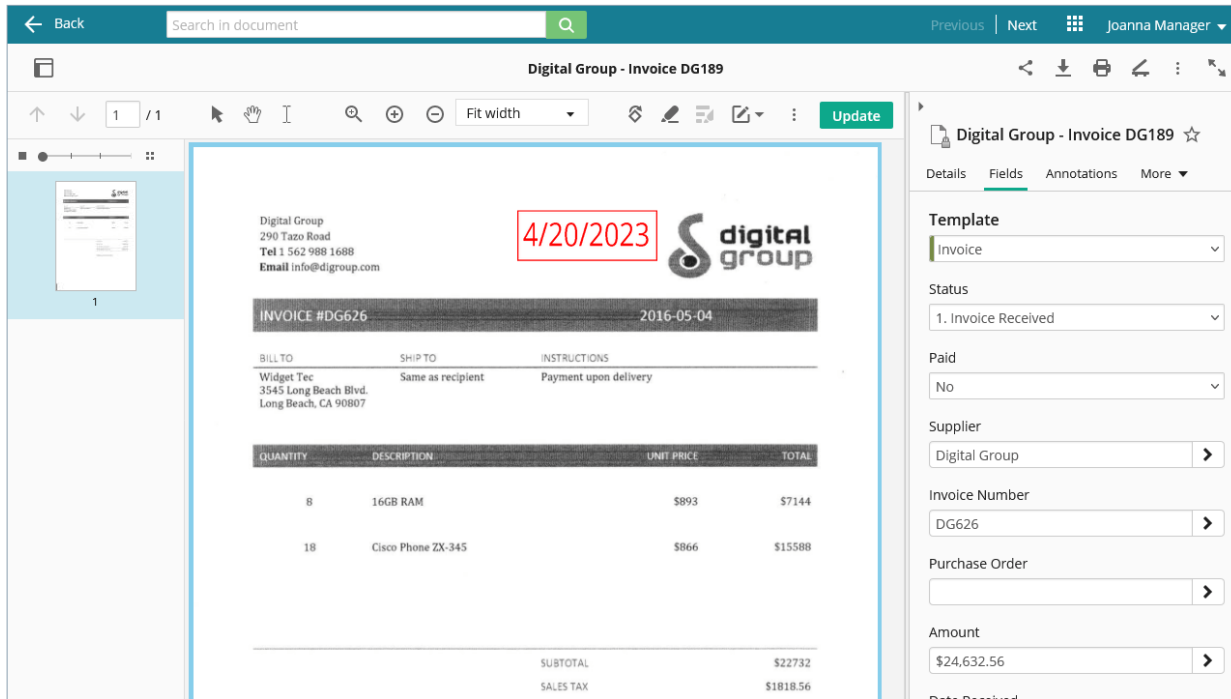


An example of a custom, dynamic stamp in the web client

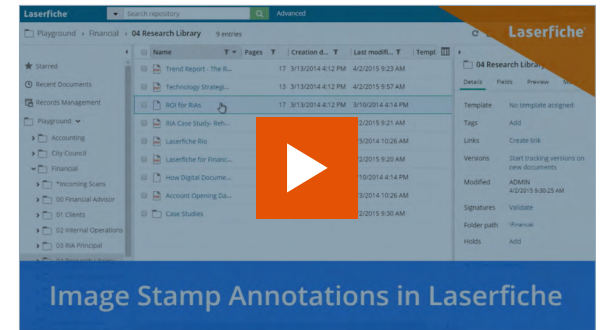


To learn more, watch the video:

[Text Stamp Annotation](#)



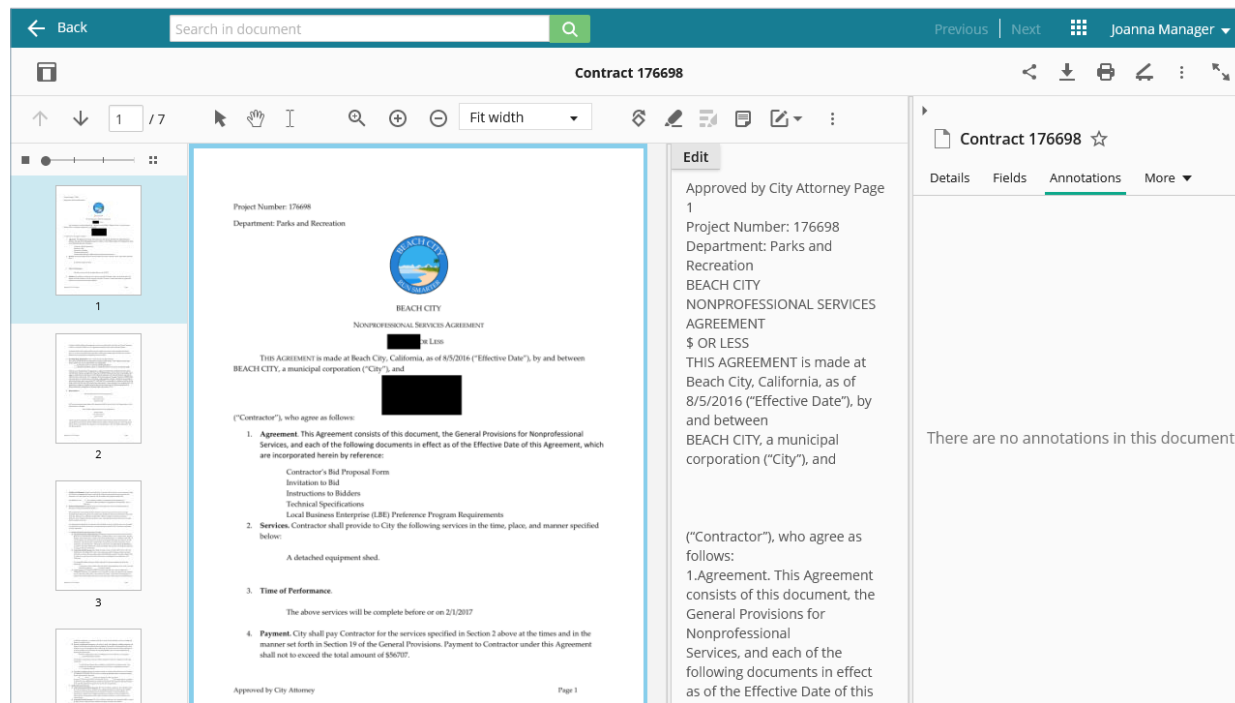
The custom date stamp applied to a document in the web client



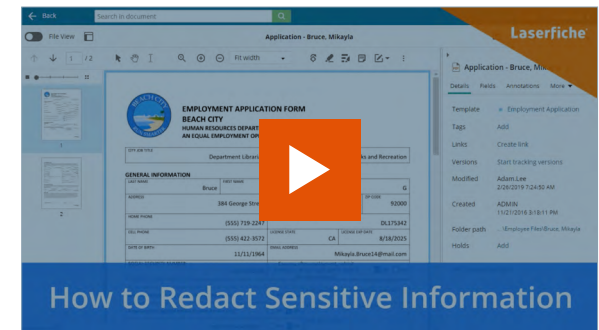
To learn more, watch the video:
Image Stamp Annotations in Laserfiche

Redactions

Another type of annotation is a redaction. You can redact certain sections of a document and the content will not be visible to anyone who is not authorized to view it. The redactions can be either black or white.



An example of redactions placed on a document in the web client

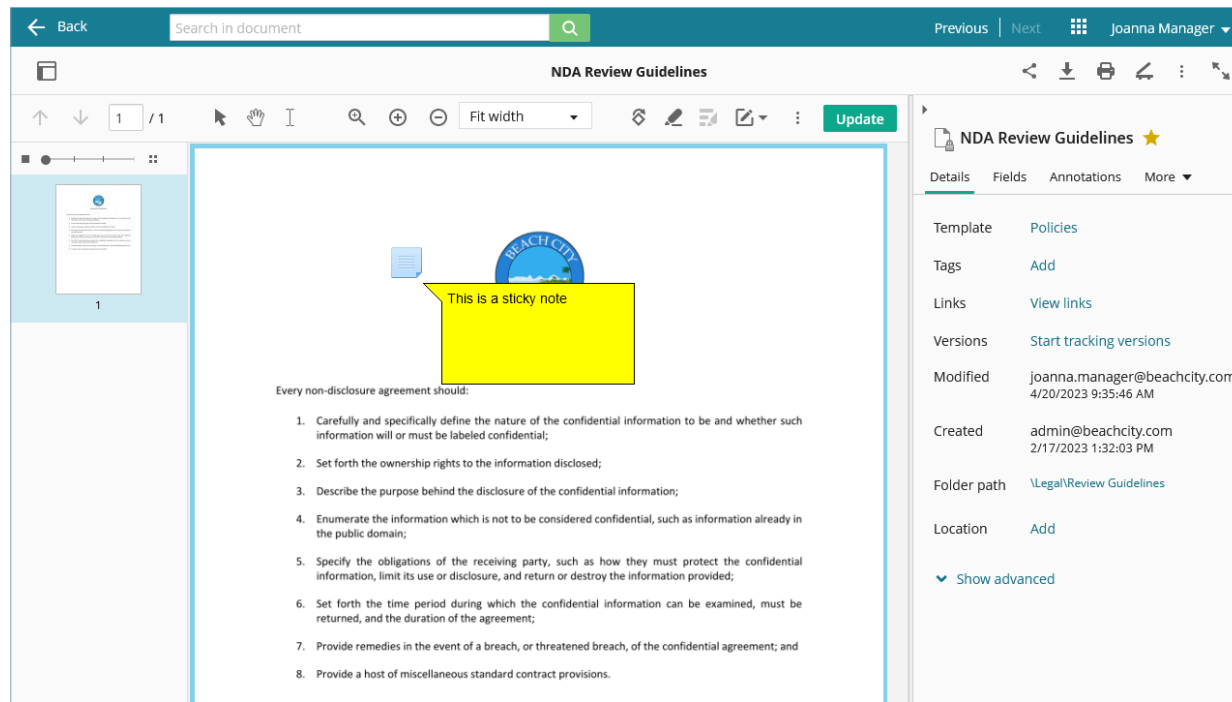


How to Redact Sensitive Information

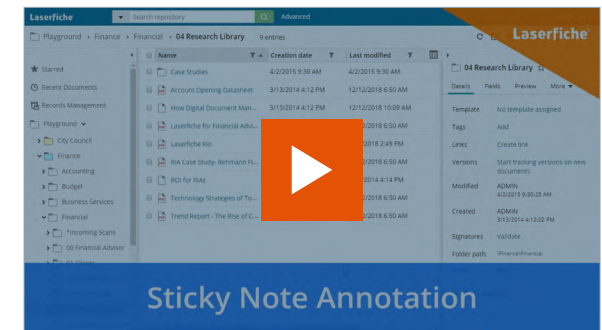
To learn more, watch the video: [How to Redact Sensitive Information](#)

Sticky Notes

Sticky notes can be added to a document, much like a sticky note would be stuck on top of a piece of paper. You can also search for the text of the sticky note.



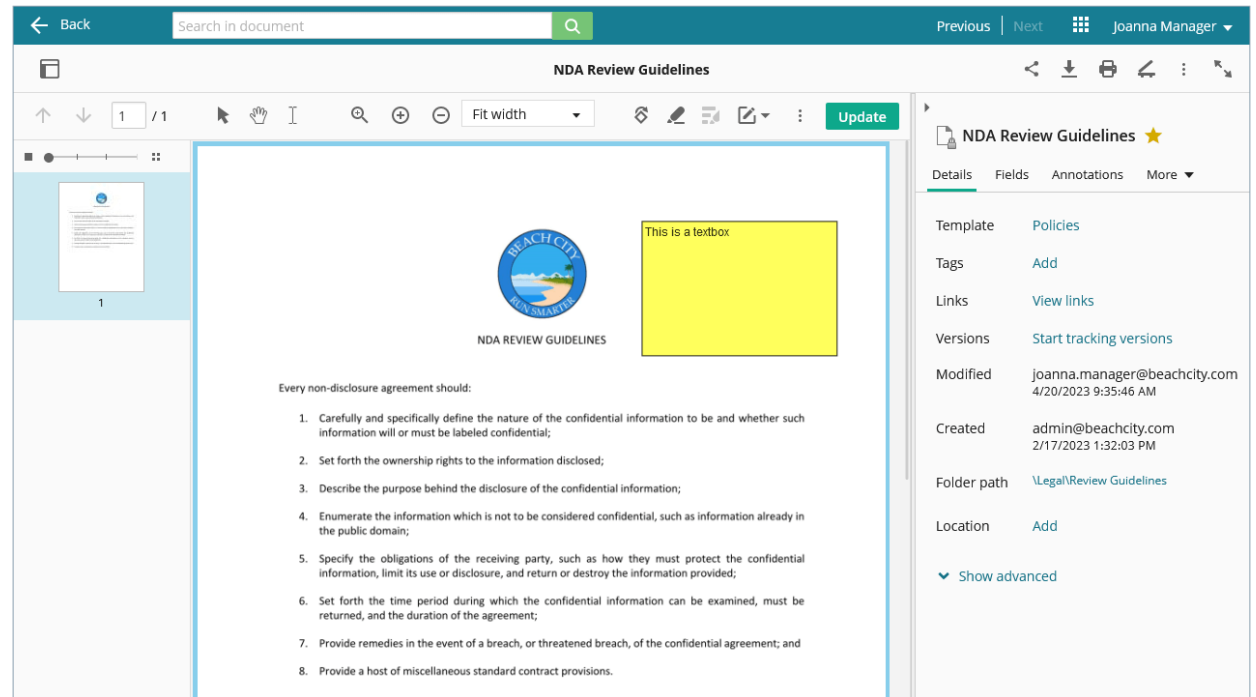
An example of a sticky note annotation with the text visible in the web client



To learn more, watch the video:
Laserfiche Sticky Note Annotation

Textboxes

Unlike a sticky note, a textbox has the text always visible. Textboxes can be used for the same function as sticky notes. You can also search for the text of the textbox. Unlike stamps, the text in sticky notes and textboxes can be altered at any time.



An example of a textbox annotation in the web client

Organizing Documents and Folders

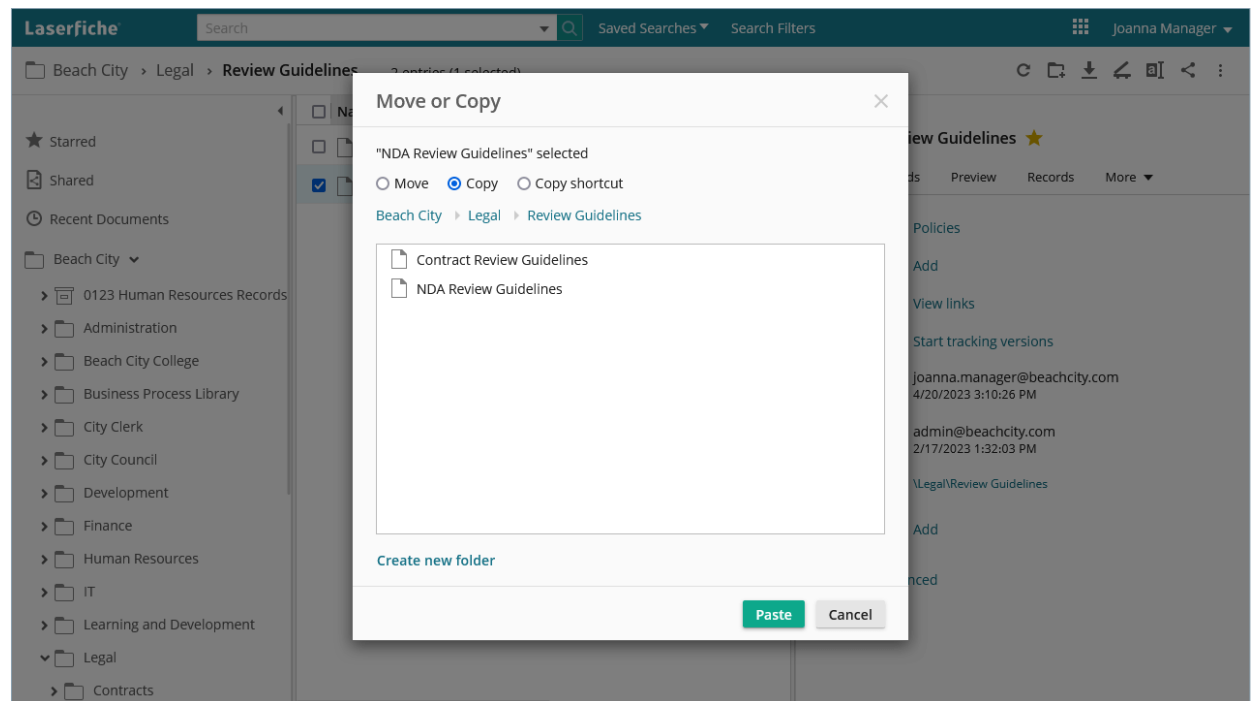
In Laserfiche, you can organize your documents and folders by creating new ones, or copying and renaming existing ones. To create a new folder, click on the Folder icon in the upper right-hand pane of the folder browser.

You can easily move or copy existing documents to a newly created folder by selecting the document, right-clicking, and choosing the Move or Copy option.

1. In the dialog box, you can choose to move copy or copy a document shortcut.
2. Double-click on the repository name in the folder path and navigate to the folder where you would like the new document to be located.
3. Once the folder is selected, click the green Move or Paste button, depending on the action chosen.

You can also drag and drop the document into the appropriate location.

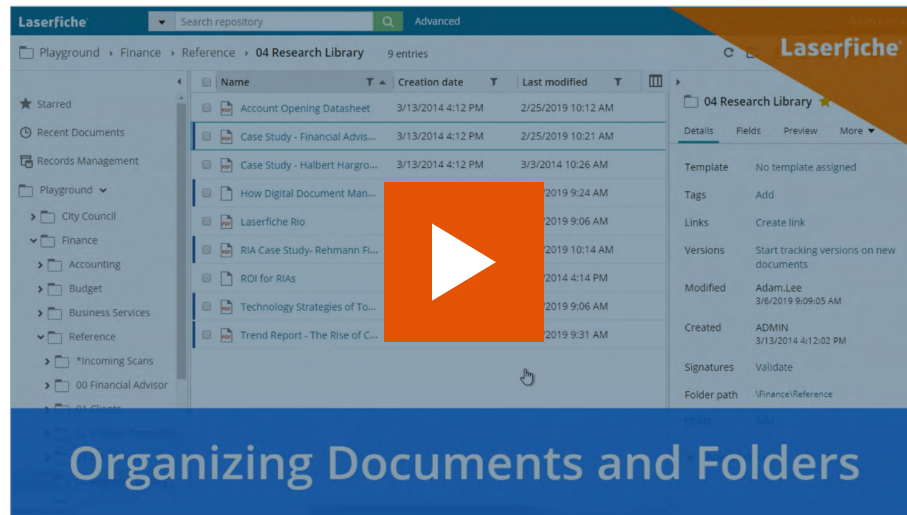
To rename a document or folder in the folder browser, select it and click the Rename button in the toolbar.



The Move or Copy dialog box in the web client

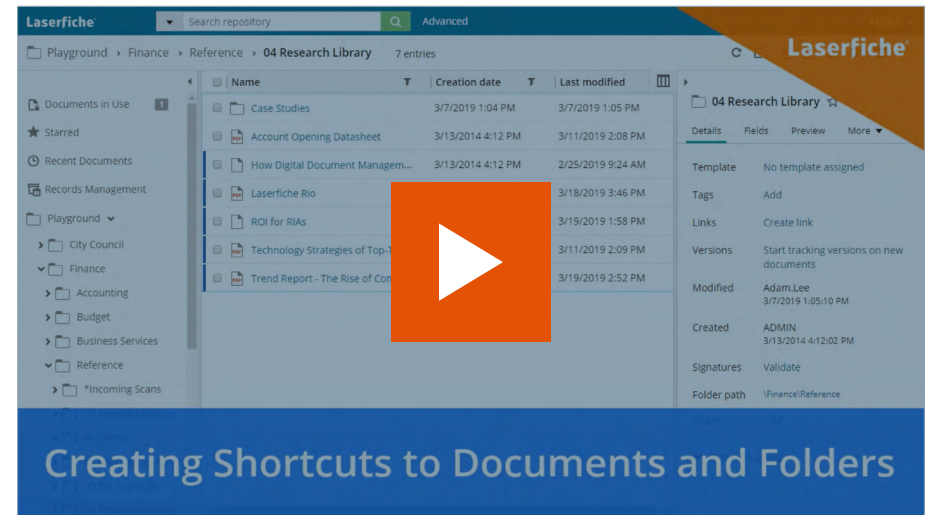


Learn how to organize documents and folders in the [product documentation](#).



Organizing Documents and Folders

To learn more, watch the video: [Organizing Documents and Folders](#)



Creating Shortcuts to Documents and Folders

To learn more, watch the video: [Creating Shortcuts to Documents and Folders](#)

Searching

Laserfiche offers a variety of ways to search for documents and folders.

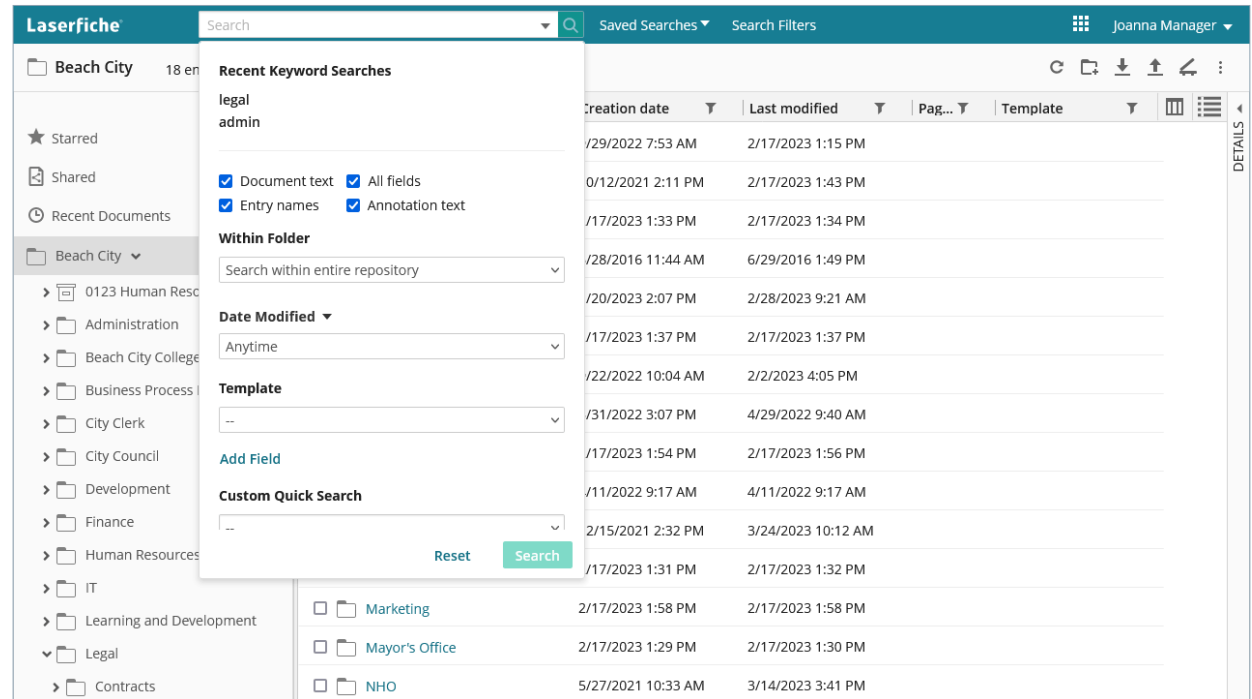
The most commonly used search option is the Quick Search, which is accessible via the search bar in the folder browser. The Quick Search allows you to search with a few different options.

- Document text
- Entry names
- All fields
- Annotation text

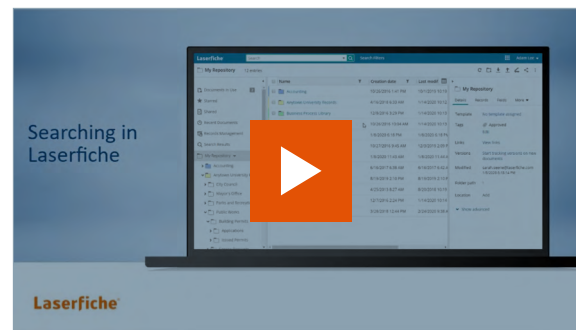
You can also refine your search by selecting the following search options:

- Within folder
- Template or field
- Date modified


If you have custom quick searches saved, you can also select that search from the Custom Quick Search drop-down.



The Quick Search options in the web client



To learn more, watch the video:
[Searching in Laserfiche](#)



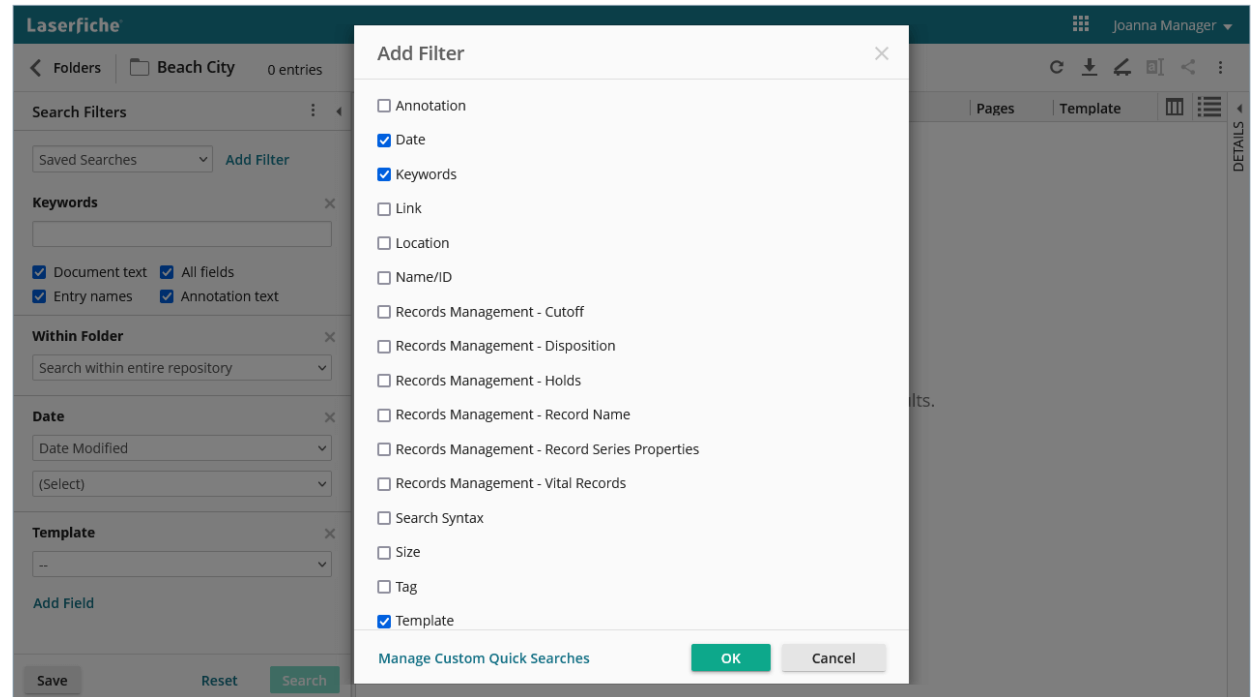
Learn how to create a custom quick search in the [product documentation](#).

Advanced Search Options

Sometimes, the basic Quick Search is not as specific as you may like. In cases like these, Laserfiche allows for more advanced searches. In the folder browser, click on Search Filters next to the search bar to open the advanced search options. From there, you can click the Add Filter to pull up a list of available search filters.

Some of the most popular search filters include:

- Field and Template
- Name/ID
- Text
- Date
- Within Folder
- Type



The advanced search options

Field and Template

For a Field search, you can select either a template or fields. If you select a template and leave the fields blank, the search will return all documents with that template. To remove a search type, click on the X in the upper right-hand corner.

The screenshot shows the Laserfiche search interface. At the top, it says "Laserfiche" and "Folders | Beach City | 0 entries". Below that is a "Search Filters" section with a "Saved Searches" dropdown and an "Add Filter" button. The "Template" filter is active, showing a dropdown menu with "Policies" selected. Other filters include "Date Issued" (set to "(Select)"), "Issuing Body" (empty text field), "Last Updated" (set to "(Select)"), and "Description" (empty text field). There is an "Add Field" button below the description field. At the bottom, there are "Save", "Reset", and "Search" buttons.

The Template and Field search

Text

A Text search searches any documents for a key word or phrase. You can perform And/Or/Not/Within searches. A TIFF file must be OCR'd in order for the Text search to work properly.

The screenshot shows the Laserfiche search interface. At the top, it says "Laserfiche" and "Folders | Beach City | 0 entries". Below that is a "Search Filters" section with a "Saved Searches" dropdown and an "Add Filter" button. The "Text" filter is active, showing two text input fields: the first contains "admin" and the second contains "legal". Between the fields is an "Or" dropdown menu. At the bottom, there are "Save", "Reset", and "Search" buttons.

The Text search

Within Folder

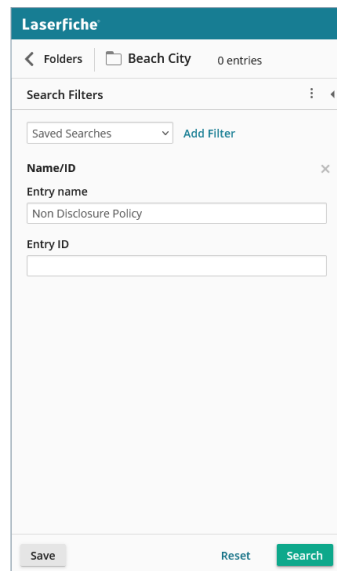
A Within Folder search narrows the search to a specific folder. To get more specific results, you can join different search types together, such as a Text search and a Within Folder search.

The screenshot shows the Laserfiche search interface. At the top, it says "Laserfiche" and "Folders | Beach City | 0 entries". Below that is a "Search Filters" section with a "Saved Searches" dropdown and an "Add Filter" button. The "Text" filter is active, showing two text input fields: the first contains "admin" and the second contains "legal". Between the fields is an "Or" dropdown menu. Below the text filters is the "Within Folder" filter, which has a dropdown menu set to "Search within selected folder", another dropdown menu set to "Within", and a text field containing the path "\Human Resources\Incoming\Employment ...". There is an "Add" button and a checked checkbox labeled "Include subfolders". At the bottom, there are "Save", "Reset", and "Search" buttons.

The Text search joined with the Within Folder search in the web client

Name/ID

A Name/ID search searches only the document or folder name or entry ID.

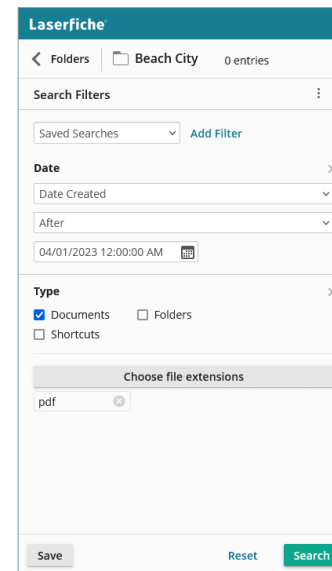


The screenshot shows the Laserfiche search interface. At the top, it says "Laserfiche" and "Folders Beach City 0 entries". Below that is a "Search Filters" section with a dropdown for "Saved Searches" and an "Add Filter" button. A "Name/ID" filter is active, with a sub-section for "Entry name" containing the text "Non Disclosure Policy" and an "Entry ID" field that is currently empty. At the bottom, there are "Save", "Reset", and "Search" buttons.

The Name/ID search

Date

A Date search enables you to find documents or folders based on the last modified or created dates. You can specify if you are looking for folders, documents, or shortcuts by joining the Date search with the Type search.

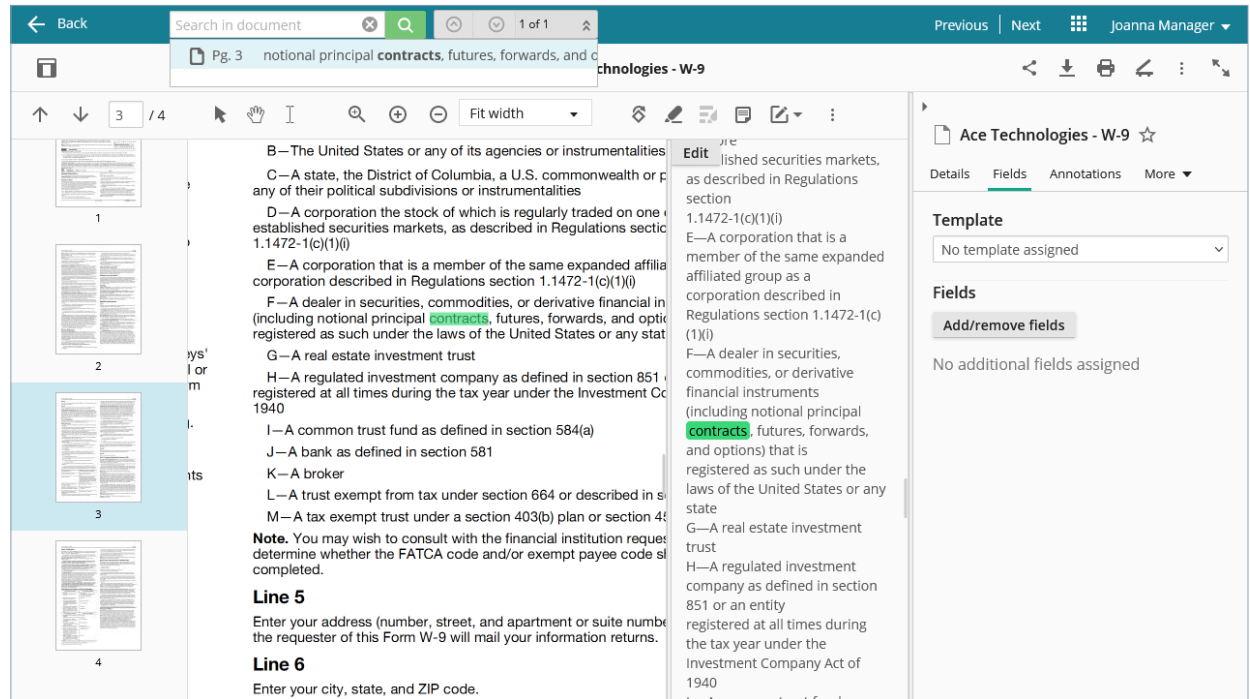


The screenshot shows the Laserfiche search interface. At the top, it says "Laserfiche" and "Folders Beach City 0 entries". Below that is a "Search Filters" section with a dropdown for "Saved Searches" and an "Add Filter" button. A "Date" filter is active, with a sub-section for "Date Created" set to "After" and a date field containing "04/01/2023 12:00:00 AM". A "Type" filter is also active, with checkboxes for "Documents" (checked), "Folders", and "Shortcuts". Below the "Type" filter is a "Choose file extensions" button and a field containing "pdf". At the bottom, there are "Save", "Reset", and "Search" buttons.

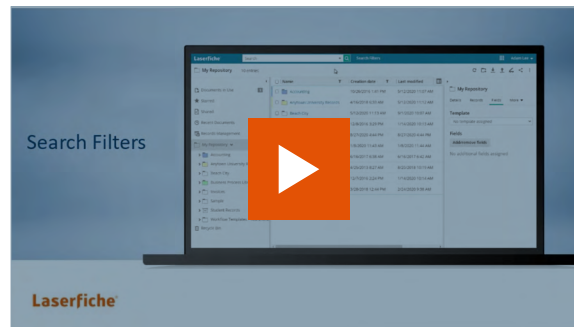
A Date search joined with a Type search

If your search returns just one result, then that document will open automatically. If it returns multiple results, then selecting an individual document will display the context hits within the document in the Context Hits pane. You can also view all instances of the search term highlighted in the document after you open it (for TIFF documents only).


If you want to navigate to the folder in which that document resides, you can click on the folder path in the Details tab.



Opening a search result with the context hits highlighted.



To learn more, watch the video:
[Search Filters](#)



Learn more about the various search filters available in the [product documentation](#).



Tips and Tricks for Working with Documents

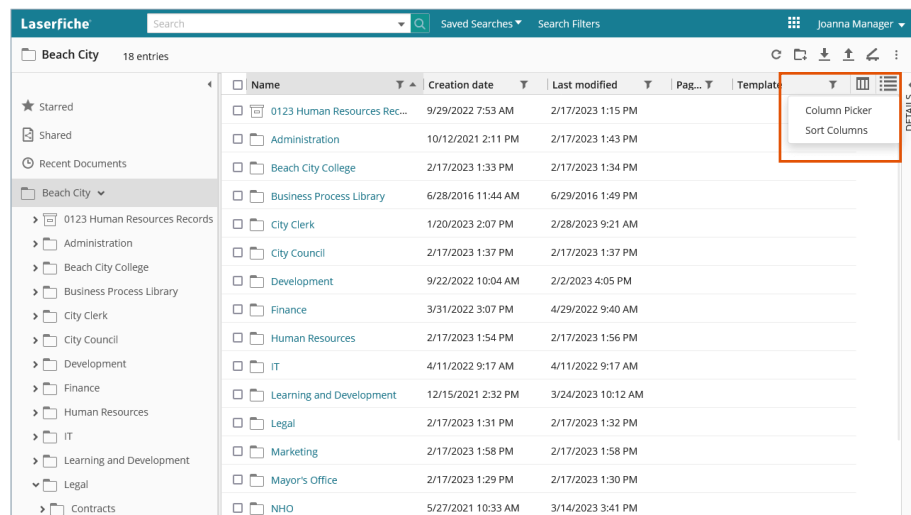
- [Customizing the Folder Browser Column View](#)
- [Saving a Search](#)
- [Bookmarking Pages in a Document](#)
- [Customizing the Document Viewer](#)
- [Setting Up Import Profiles](#)
- [Changing the Default Application When Signing In](#)
- [Simplifying Field Entry](#)

Customizing the Folder Browser Column View

The Laserfiche folder browser allows you to customize your column display for each folder by creating and saving column profiles. Once created, a user can switch between them easily. This can be helpful if you are responsible for reviewing different types of documents stored in separate folders. For example, a folder that contains job applications can have a different set of columns displayed than one that contains invoices. By adding specific field information as columns, you are able to view information about the job applicants or invoices at a glance, without having to open each folder or document individually.

Configure Column Profiles

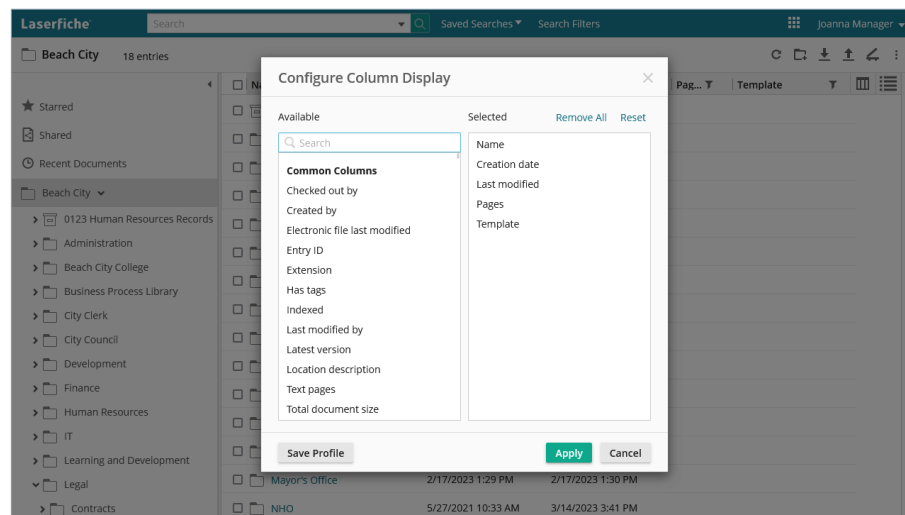
To save this column profile, right-click in the column header and select Load/Save Columns – Save. Name the column profile and click OK. Your profile has been saved.



The Change Column Display button in the web client

Saving a Selected Column Profile

Click on Change Column Display button and select Column Picker. Add or remove your columns and click Save Profile. You can also get to the Configure Column Display menu by right-clicking on the column headers and selecting the Column Picker.



The column picker in the web client

Follow the same directions for creating another column profile. After saving it, you'll be able to quickly switch between column views by right-clicking in the column headers and selecting Saved Columns along with the name of your profile.

Load Column Profiles

You can also load a column profile by clicking on Change Column Display button and selecting Saved Columns. From there, select the column profile that you would like to use. Additionally, you can set a default column sort order by clicking on Sort Columns from the Change Column Display menu.

Sort Columns

You can sort by more than one column by selecting the appropriate column, right-clicking in the column header and selecting Sort Columns. You can then click on other column headers to create a multi-column sort. Click the Reset button to reset the columns.

The screenshot shows the Laserfiche web client interface. At the top, there is a search bar and navigation options. Below that, the breadcrumb path is 'Beach City > Legal > Nondisclosure Agreements' with 12 entries. The 'Sort columns by' section shows two columns selected: '1 Last modified' and '2 Name', with a 'Reset' button. The main table displays a list of documents with columns for Name, Creation date, Last modified, Pag..., and Template. The table content is as follows:

Name	Creation date	Last modified	Pag...	Template
2018	2/17/2023 1:31 PM	2/17/2023 1:31 PM		
2019	2/17/2023 1:31 PM	2/17/2023 1:31 PM		
2020	2/17/2023 1:31 PM	2/17/2023 1:32 PM		
2021	2/17/2023 1:32 PM	2/17/2023 1:32 PM		
Nondisclosure Agreement - ...	2/17/2023 1:32 PM	3/5/2020 3:51 PM	3	
Nondisclosure Agreement - ...	2/17/2023 1:32 PM	3/5/2020 4:04 PM	2	
Nondisclosure Agreement - ...	2/17/2023 1:32 PM	3/5/2020 4:06 PM	2	
Nondisclosure Agreement - ...	2/17/2023 1:32 PM	3/5/2020 4:07 PM	2	Nondisclosure Agreem...
Nondisclosure Agreement - ...	2/17/2023 1:32 PM	4/13/2020 1:34 PM		
Nondisclosure Agreement - ...	2/17/2023 1:32 PM	4/13/2020 1:41 PM		
Nondisclosure Agreement - ...	2/17/2023 1:32 PM	6/1/2021 2:16 PM	2	Nondisclosure Agreem...
Nondisclosure Agreement - ...	2/17/2023 1:32 PM	6/1/2021 2:23 PM	2	Nondisclosure Agreem...

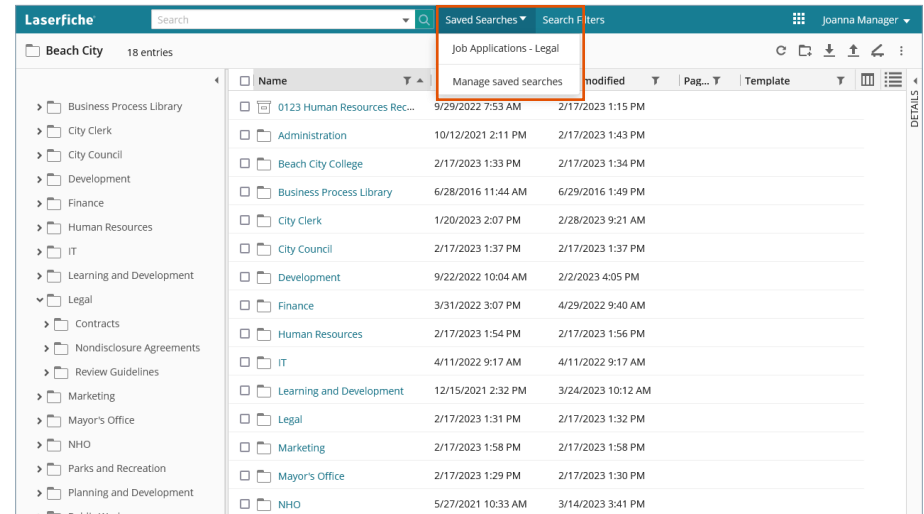
Configuring a multi-column sort in the web client

The screenshot shows the Laserfiche web client interface with a video player overlay. The video player has a play button and the text 'Column Profiles' below it. The background shows the document list interface.

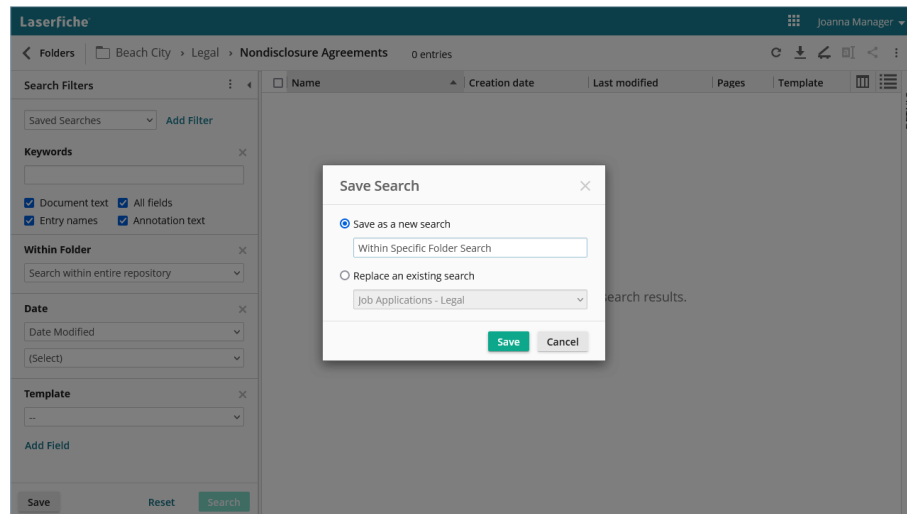
To learn more, watch the video: Laserfiche Column Profiles

Saving a Search

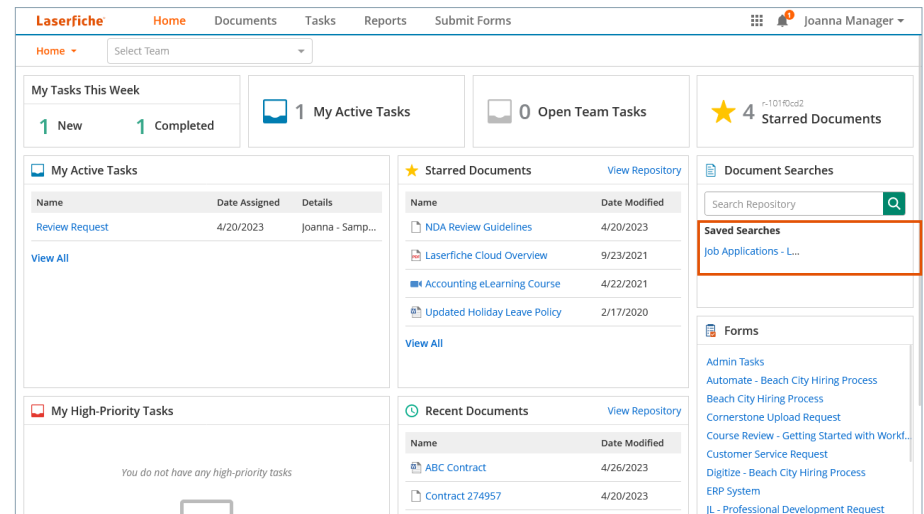
If you perform the same search regularly, you can save it as a Saved Search. This search will then be accessible from within the Saved Searches drop-down next to the Search box in the folder browser navigation bar. It will also be available on the Saved Searches section of the Home Screen in Laserfiche Cloud. For example, if you have to search for all contracts that expired during the week, you can create this search once and then save it, saving you time when you need to run it again next week.



Selecting a saved search from the drop-down menu in the folder browser



Saving a search



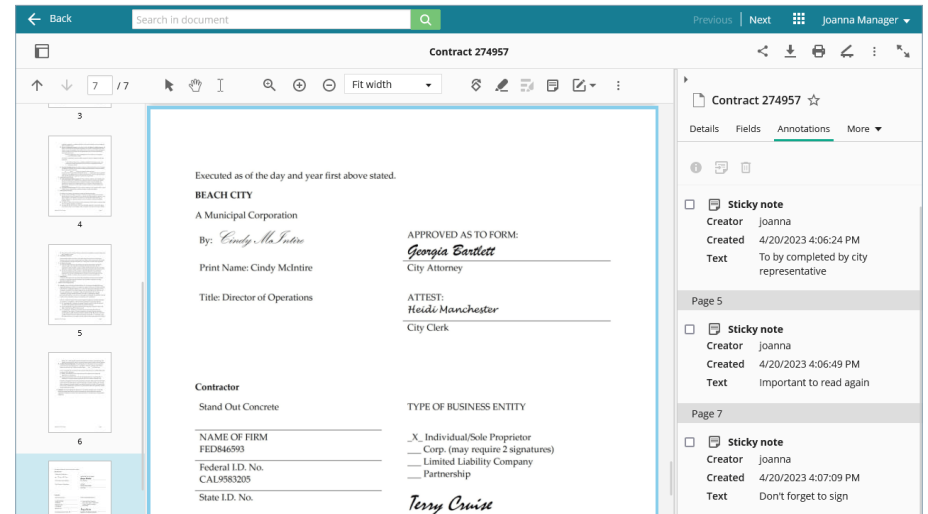
The saved search section of the Home Screen

Bookmarking Pages in a Document

When working within large documents, it can be useful to leave a bookmark so you remember where you found a particular piece of information, or so that you know where you left off when working over more than one day. In Laserfiche, you can use annotations and the Annotations pane as a bookmark list.

For example, you might add a sticky note to signal where you stopped reading so that you begin there the next day. You can then display the Annotations pane and jump immediately to the location that you need by clicking on the annotation. You can even display the sticky note text in the pane to distinguish one bookmark from another. If you do not want to display your bookmarks to other users, you can make them private.

The annotations pane can be accessed by clicking the Annotations tab in the Details pane.

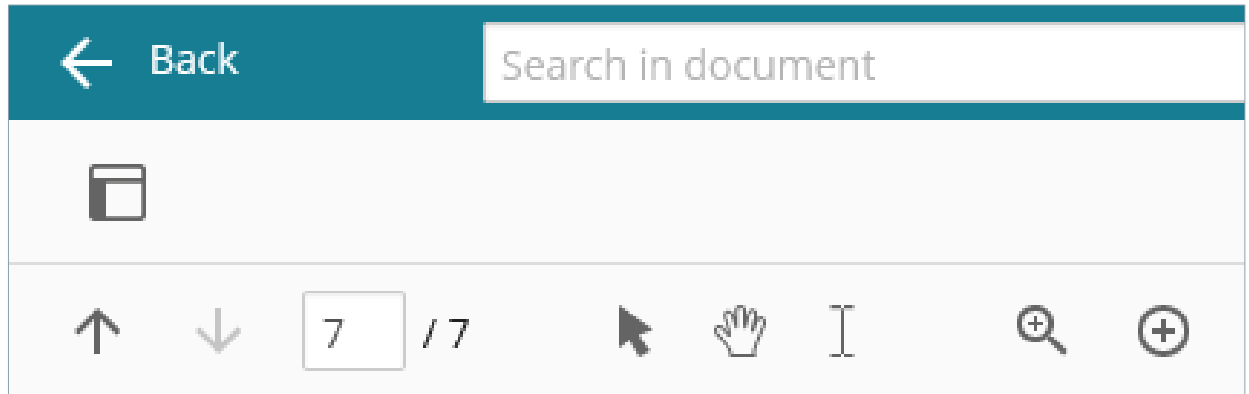


Annotations used as bookmarks in the Web client

Customizing the Document Viewer

You can customize the panes in the Laserfiche Windows client document viewer, allowing you to close panes you do not want to use and open panes you do.

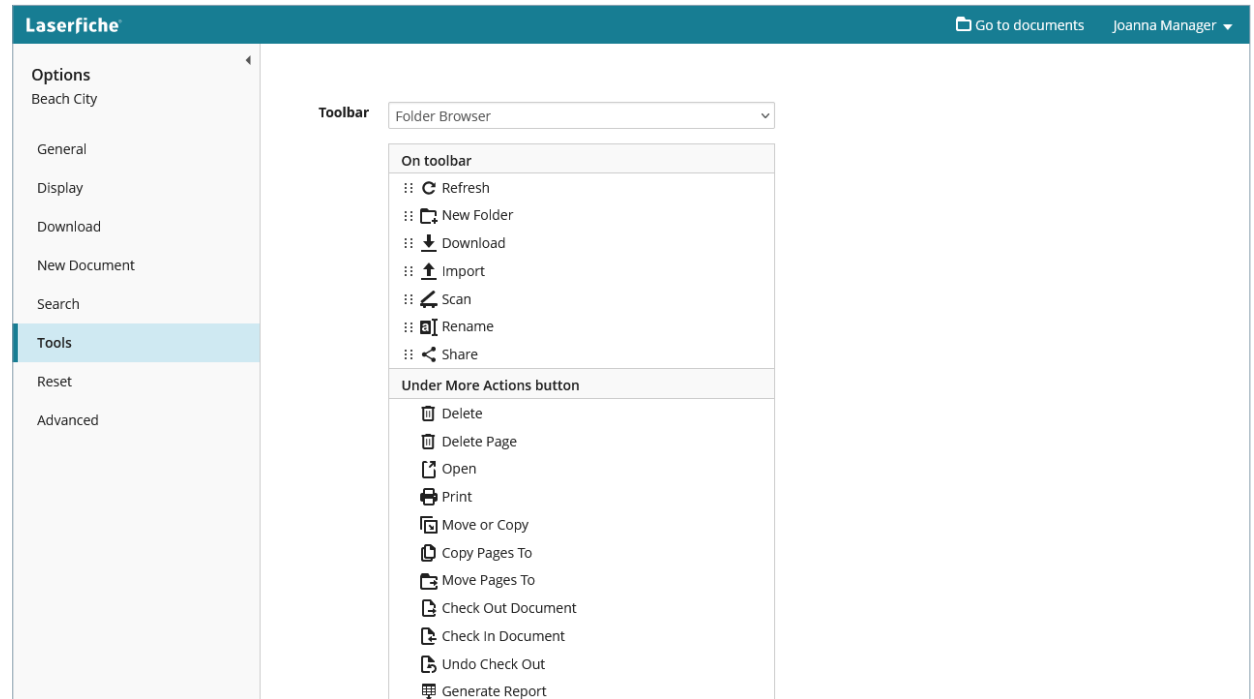
To modify the configuration of document viewer panes in the web client, click on the Toggle Panes button. From there, you can toggle through the different pane options.



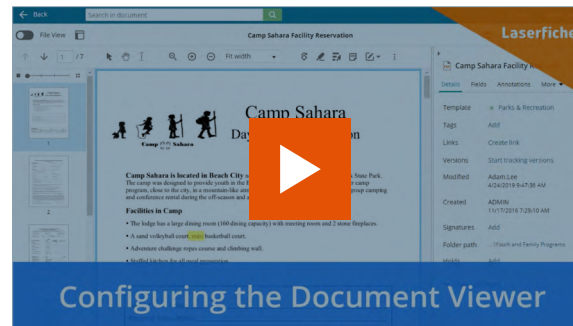
Clicking the Toggle Panes button toggles through the different pane options

Toolbar

You can also customize the buttons visible on the toolbar. To customize the toolbar, navigate to the Tools section in the Options menu (found when clicking on your user name in the upper right corner of the screen). Drag the options you want to display to the “On toolbar” list and drag the options you do not want to display to the “Under More Actions button” list.



Customizing the toolbar



To learn more, watch the video:
Configuring the Document Viewer

Setting Up Import Profiles

An import profile allows you to configure a default name, folder path, and template for imported documents of a particular type. When importing a document, you can select the import profile from the list, rather than manually selecting the appropriate path, template, and so forth. This allows you to speed up import of documents of a certain type, freeing up your time for other tasks. For example, if you frequently import contracts into Laserfiche, you can create an import profile that will rename the contract, route it to the appropriate folder, and apply the relevant template and field information.



Find out more information about Import Profiles in the [product documentation](#).

Changing the Default Application When Signing In

If you are a Laserfiche Cloud user, by default, you'll be presented with the Home screen when signing into Laserfiche. If you'd prefer to open another application, such as the repository, instead, you can change your default application. To do so, navigate to the My Account menu from the drop-down accessed by clicking your name in the upper right-hand corner of the screen. Find the Default application drop-down, and select the one you would like to see.

From now on, whenever you log into Laserfiche, you'll be taken to that specific application, instead of the Home screen.

The screenshot shows the 'My Account' settings page in the Laserfiche interface. The user is identified as 'Joanna Manager (ADMINISTRATOR)'. The 'Default application' dropdown menu is highlighted with an orange border, and 'Home' is selected. Other fields include Email (joanna.manager@beachcity.com), First name (Joanna), Last name (Manager), Display name (Joanna Manager), Username (Joanna), Time zone (System Default [(UTC-08:00) Pacific Time (US & Canada)]), Language (System Default [English (United States)]), Regional Format (System Default [English (United States)]), Groups (None), Old password, New password, and Confirm new password. A 'Save' button is located at the bottom left of the form.

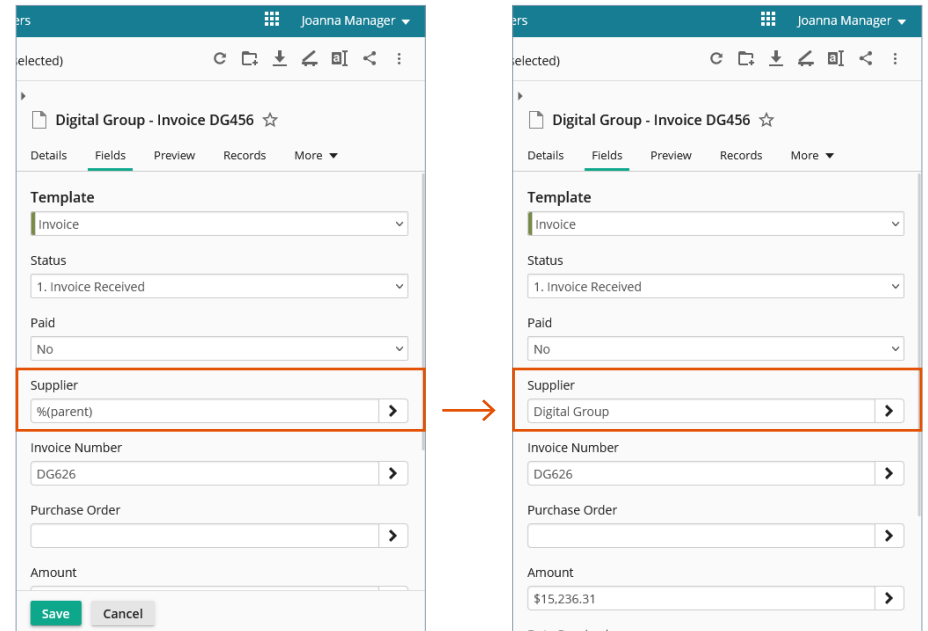
Changing the default application in Laserfiche Cloud

Simplifying Field Entry

In order to simplify the process of manually filling out fields, you can add the %(Parent) token inside a field to automatically pull information from the parent folder's template.

For example, once an invoice is received, it is moved to the supplier's folder. In order to simplify populating the Supplier field in the invoice's template, you can set the default value on this field to the %(Parent) token.

This way, the next time you view the invoice's metadata, the Supplier field will be filled with the supplier pulled from the folder's template.



Using the field data inheritance token



Find more tips and tricks in the [Tips and Tricks in Laserfiche white paper](#).

Key Laserfiche Terminology

- **Annotation:** An annotation is additional information applied to a specific page of a document, such as a highlight, a sticky note, or a redaction, that does not alter the underlying information in the document.
- **Check In/Out:** Checking out a document is a way of indicating that you are currently working on that document. When a document is checked out, other users can open the document and view its contents, but they will not be able to make or save changes to the document.
- **Document Viewer:** The document viewer displays images, text, metadata (fields, tags, links, versions, and digital signatures), annotations, and thumbnails.
- **Details Pane:** The details pane displays information about the selected document such as metadata, annotations, versions, etc.
- **Electronic Document:** An electronic document is a Laserfiche document associated with an electronic file. An electronic file is any non-image file that was created in an application other than Laserfiche. Electronic documents are usually viewed and modified using an external application.
- **Entry:** An entry is a generic term for a document or folder.
- **Entry ID:** The unique identifying number associated with an entry in Laserfiche.
- **Field:** A field stores supplemental information on a document or folder. Fields provide a quick overview of the content or important identifying characteristics of a document or folder, and increase the entry's search ability.
- **Folder Browser:** The folder browser facilitates navigation and provides a clear, hierarchical representation of how your folders have been organized.

- **Imaged Document:** When you create a document by scanning or importing pages into the repository, you create an imaged document.
- **Link:** A link is a connection between multiple documents that allows you to keep track of related items.
- **Metadata:** Metadata is a general term used to refer to information associated with a document in Laserfiche. Examples of metadata are template and field data, tags, links and version information.
- **OCR:** OCR stands for Optical Character Recognition, which is the process of extracting text from an image containing text.
- **Repository:** A repository allows information to be organized and accessible from a central location. Your repository contains your documents, the folder structure in which they are contained, and additional information such as metadata, annotations, and security.
- **Tag:** A tag is a label applied to a document.
- **Template:** A template is a collection of fields, which can be used to categorize a document for search and retrieval and to quickly apply those fields to the document.
- **Thumbnail:** A thumbnail is a miniature image of a document's page.
- **TIFF:** TIFF is the default file format for saving imaged documents in Laserfiche.
- **Token:** A token is a placeholder for a value to be inserted. Tokens can be used when populating fields in metadata, or in creating annotations such as dynamic stamps.
- **Version:** Documents in the repository can be placed under version control. When a document is under version control, changes to that document will be saved as new versions within the document. You can then view the changes to a document, keep track of edits, compare versions, or revert to another version.

Additional Laserfiche Educational Resources

Laserfiche provides numerous resources, both digital and in person, to help you get the most out of your Laserfiche system.



Aspire Learning Platform

The Aspire learning platform is a one-stop-shop for educational resources including hands-on eLearning courses, tutorial videos, more getting started guides, and white papers.

LEARN & SUPPORT

[LEARN MORE](#)



Online Product Documentation

The documentation contains a comprehensive overview of all Laserfiche functionality.

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Laserfiche Answers

This question-and-answer forum is where Laserfiche users, solution providers and developers interact.

RESOURCES

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Certification Program

The certification program contains a number of courses and paths to help you get certified on various aspects of Laserfiche.

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Support Site

The Support Site contains product downloads and technical white papers.

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User Groups

User groups are held around the world and online, to help users network, exchange tips and tricks, and learn about new features.

[RESOURCES](#)

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Instructor-Led Training

Receive hands-on training in a Laserfiche sandbox environment led by a Laserfiche expert.

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Empower Conference

The annual Empower Conference lets you choose from numerous sessions and hands-on labs taught by Laserfiche experts.

[RESOURCES](#)

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Solution Marketplace

Download numerous process templates to help jump start your Laserfiche process automation.

[RESOURCES](#)

[BROWSE](#)



About Laserfiche

Laserfiche is the leading SaaS provider of intelligent content management and business process automation. Through powerful workflows, electronic forms, document management and analytics, the Laserfiche® platform accelerates how business gets done, enabling leaders to focus on growth across the enterprise.

Laserfiche pioneered the paperless office with enterprise content management. Today, Laserfiche's cloud-first development approach incorporates innovations in machine learning and AI to enable organizations in more than 80 countries to transform into digital businesses. Customers in every industry — including government, education, financial services, healthcare and manufacturing — use Laserfiche to boost productivity, scale their business and deliver digital-first customer experiences.

Laserfiche employees in offices around the world are committed to the company's vision of empowering customers and inspiring people to reimagine how technology can transform lives.

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Connect with Laserfiche

