

Automate Document Import

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Overview

Basic/Manual Methods to Import Documents

- ✓ *Drag & Drop – Import Button*
- ✓ *Snapshot*
- ✓ *Scanning*

Advanced/Automated Methods to Import Documents

- ✓ *Import Agent*
- ✓ *Email Archiving*
- ✓ *Quick Fields*

Basic Import Methods



Drag & Drop – Import Button

- ✓ *Simplest way to import*
- ✓ *Good for one-time and irregular capture*



Laserfiche Snapshot

- ✓ *Print or save documents directly to Laserfiche*
- ✓ *Good for archiving documents or saving copies of webpages*



Laserfiche Scanning

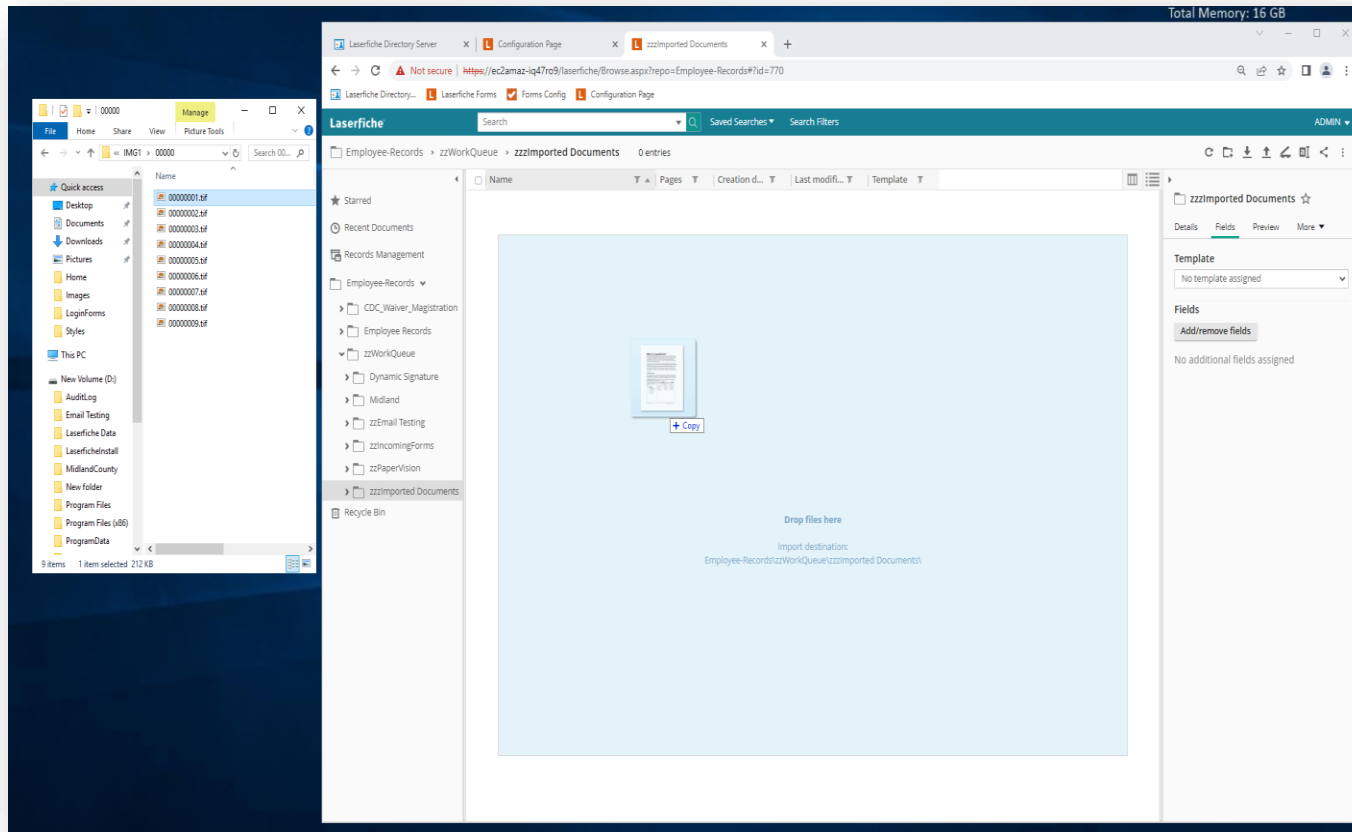
- ✓ *Scan physical documents directly to Laserfiche*
- ✓ *Good for handling batches of documents*

Drag & Drop – Import Button

Primary Uses

- ✓ *Importing documents stored locally or on the network*
- ✓ *Importing single or multiple documents*
- ✓ *One-time or irregular capture*
- ✓ *Simplest way to import documents*
- ✓ *Easily specify which folder to import into*
- ✓ *Apply metadata directly on import*

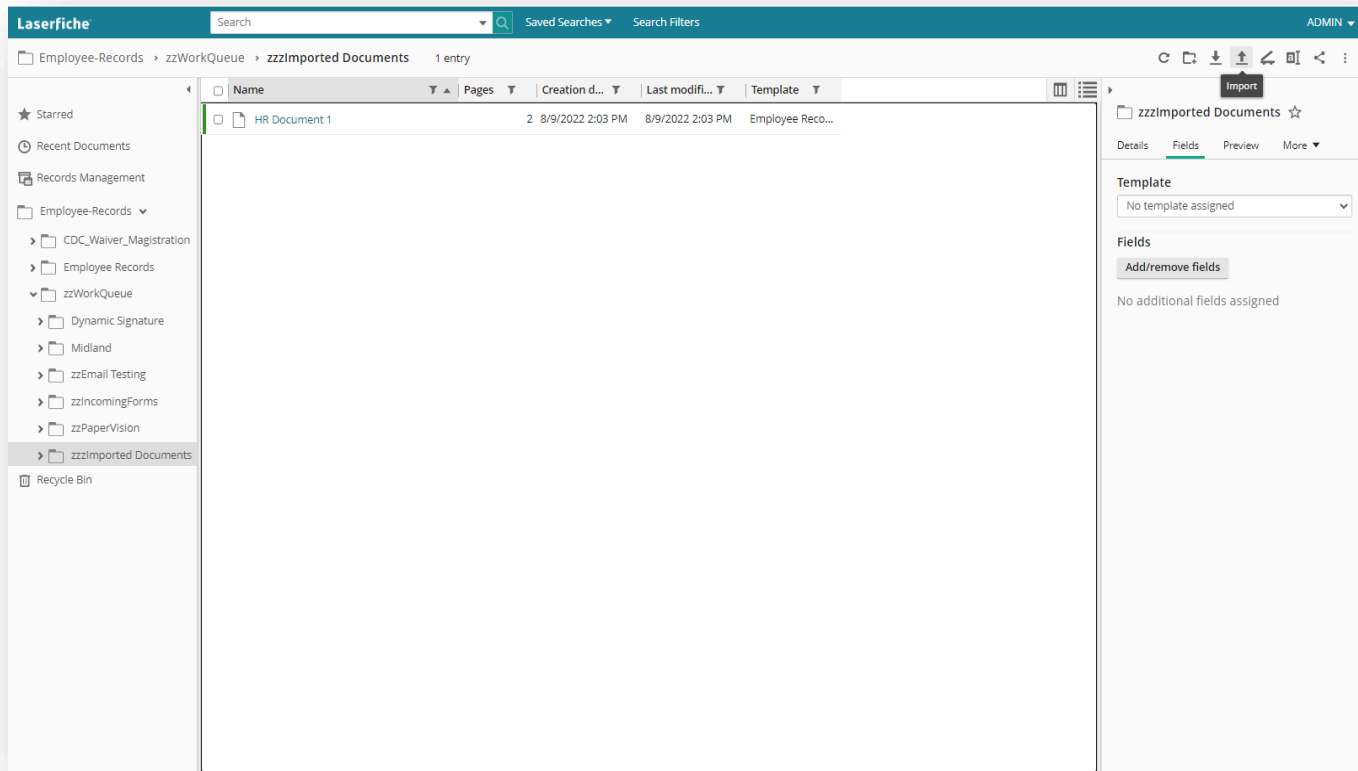




Importing through Drag & Drop

- ✓ *Select document from local device (or network)*
- ✓ *Can select single document or multiple*
- ✓ *Drag over to Laserfiche (Windows or Web Client)*

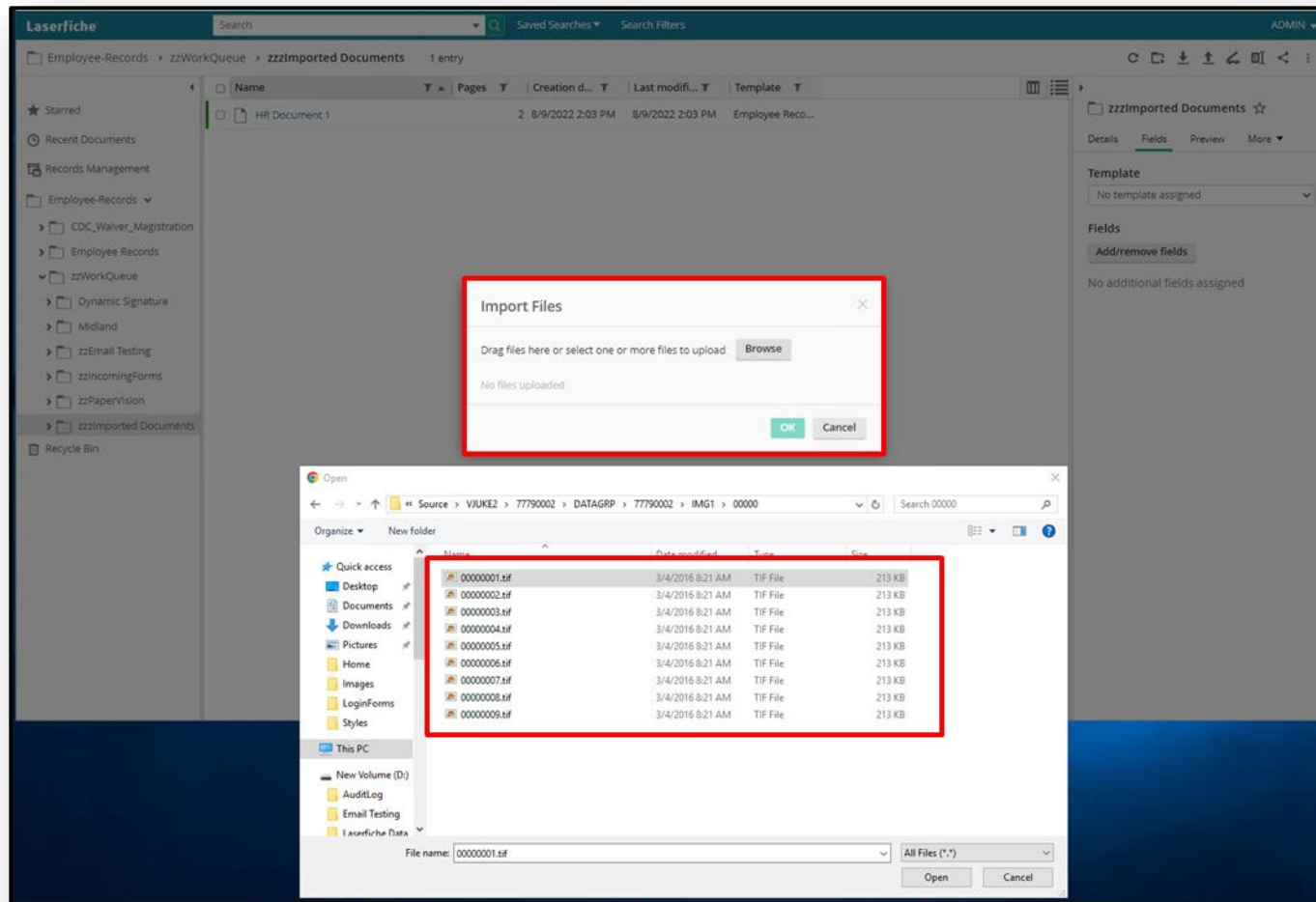
Drag & Drop



Importing through Import Button

- ✓ *Click Import button*
- ✓ *Alternative to Drag & Drop*

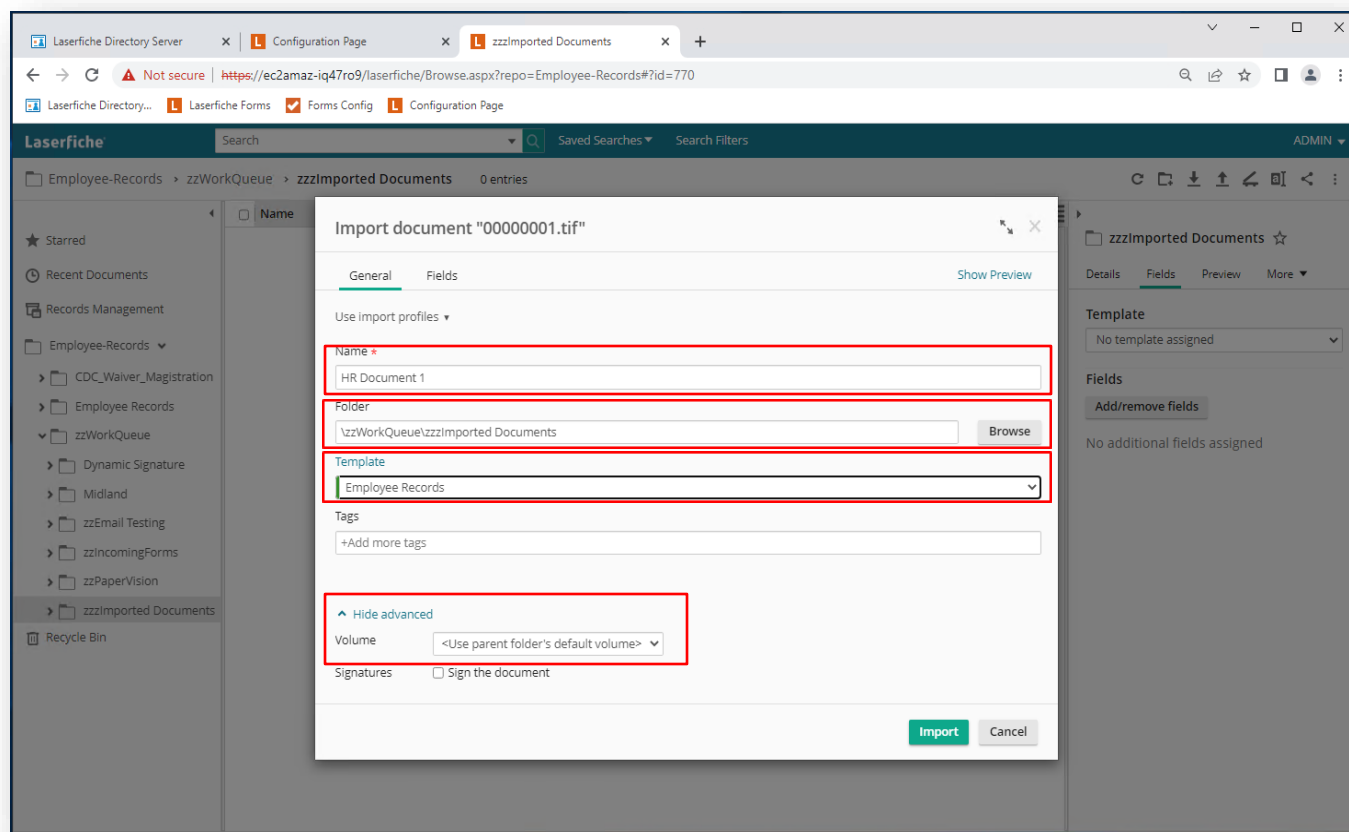
Import Button



Importing through Import Button

- ✓ *Browse for documents*
- ✓ *Select a single document or multiple documents*

Import Button



Apply Information to Document

- ✓ *Name*
- ✓ *Template*
- ✓ *Volume*

Drag & Drop – Import Button

ueue > zzzImported Documents 0 entries

Name

Import document "00000001.tif"

General Fields Show Preview

Template
Employee Records

Employee ID

Department

Position

First Name

Last Name

Document Type

Document Desc

Document Date
/ /

Fields
Add/remove fields

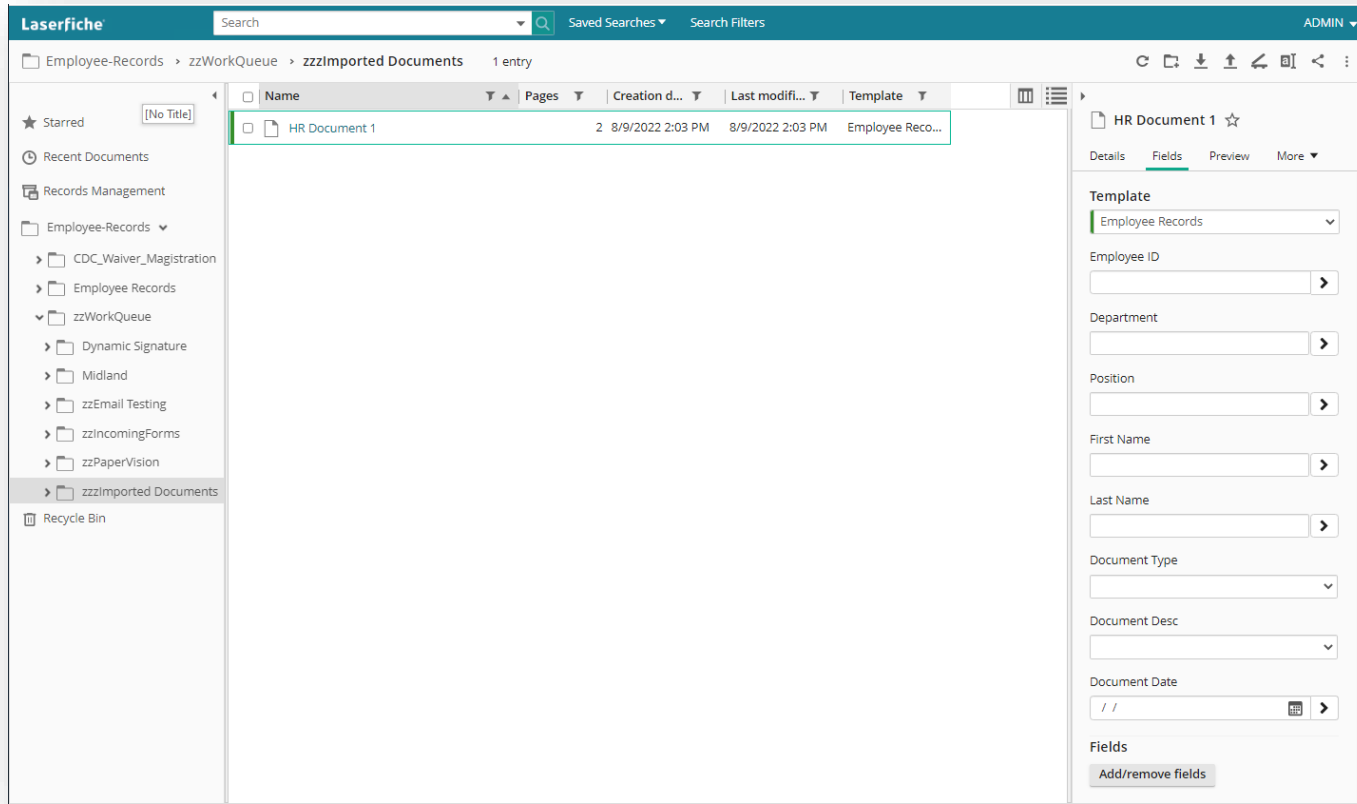
No additional fields assigned

Import Cancel

Apply Metadata to Document

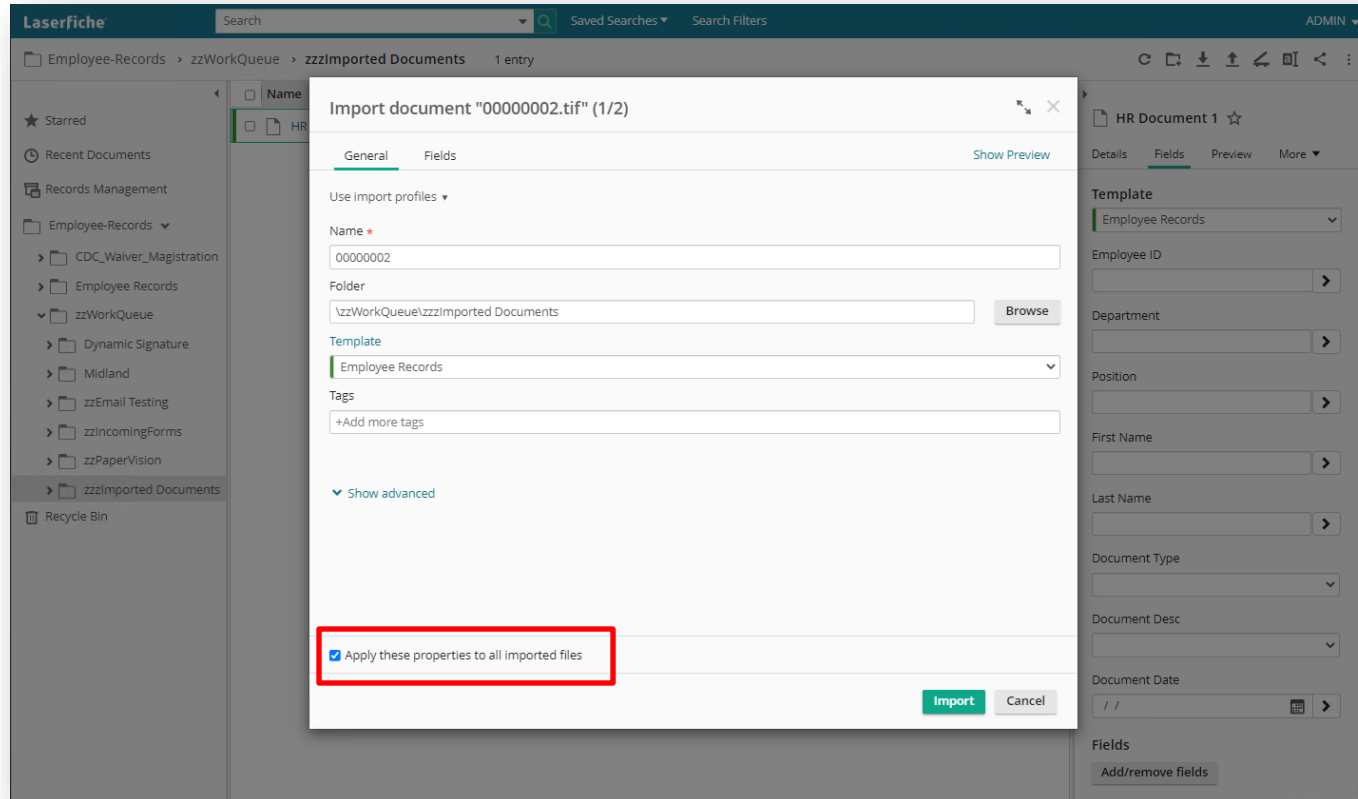
- ✓ *Fields based on selected Template*
- ✓ *Add additional Fields*

Drag & Drop – Import Button



**Document is now in
Laserfiche with
applied information**

Drag & Drop – Import Button



For Multiple Images selected...

- ✓ *Apply information to each individual document*
- ✓ *Apply the same properties to all imported documents*

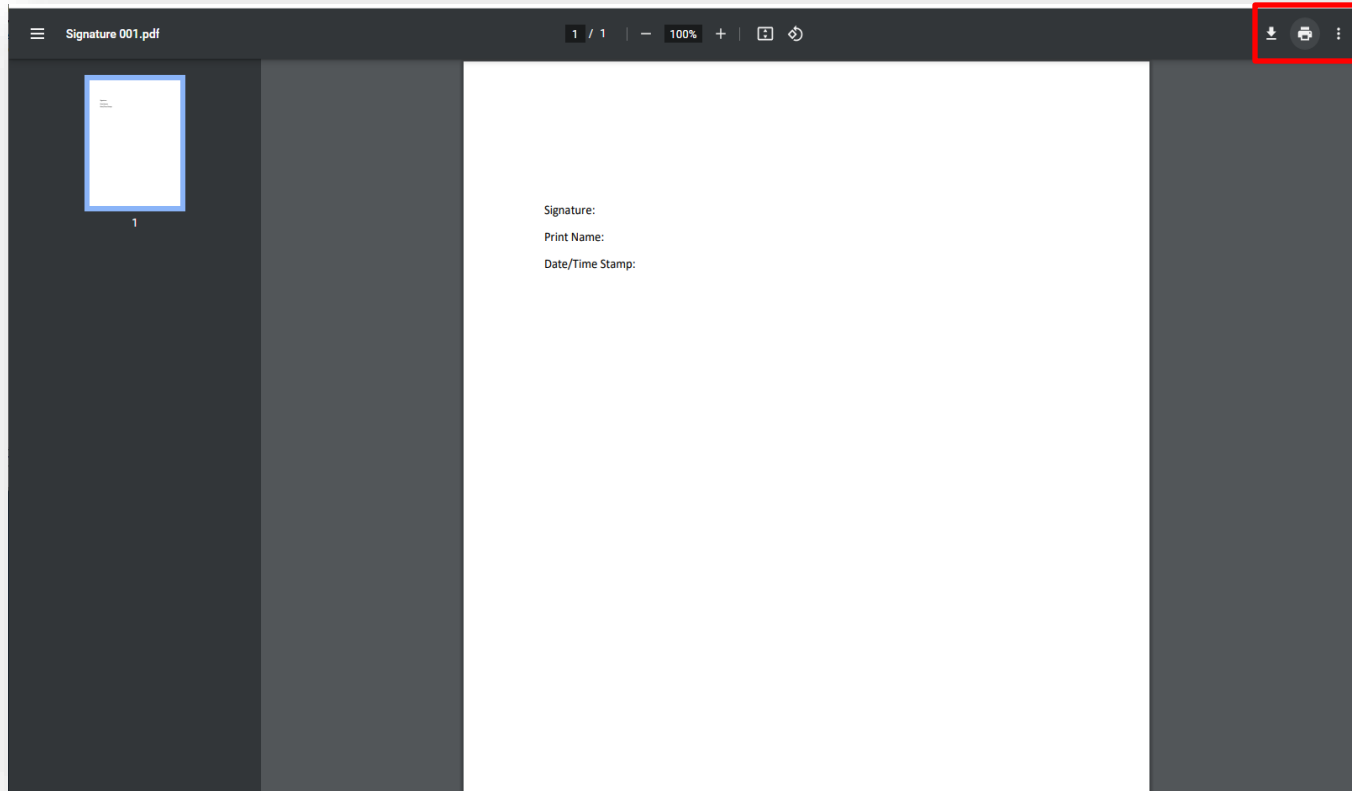
Drag & Drop – Import Button

Laserfiche Snapshot

Primary Uses

- ✓ *Archiving documents into Laserfiche*
- ✓ *Converts documents into TIFF images*
- ✓ *Saves copies of web pages*
- ✓ *Save electronic documents as unalterable copies*
- ✓ *Snapshot must be installed on computer*

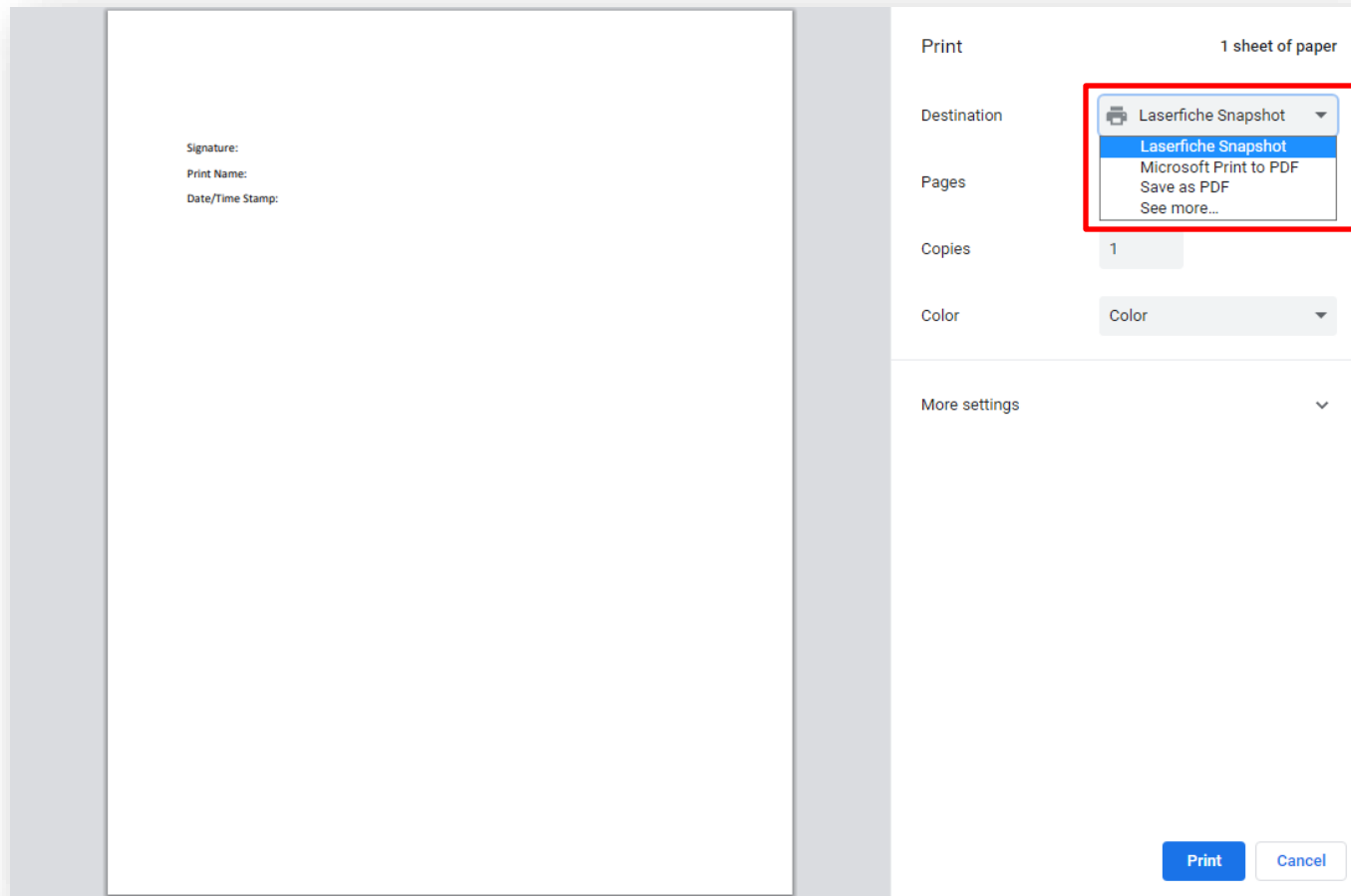




Importing through Snapshot

- ✓ *Open Document*
- ✓ *Select "Print"*
- ✓ *Works with PDFs, Word Documents, Excel Spreadsheet, Web pages, and more...*

Snapshot Process



Importing through Snapshot

- ✓ Select "Laserfiche Snapshot"
- ✓ Click "Print"

Snapshot Process

Signature:
Print Name:
Date/Time Stamp:

Laserfiche Snapshot

Repository Login

Repository
Server:
EC2AMAZ-IQ47RO9

Repository selection:
Employee-Records

☐ Use TLS Connection
[Click here to sign in to Laserfiche Cloud](#)

Authentication
Log into the repository using:
☐ Windows authentication
☒ This user account
User name:
Password:

☐ Laserfiche Directory Server
Directory Server URL:
https://EC2AMAZ-IQ47RO9/LFDSSTS

OK Cancel

Importing through Snapshot

- ✓ *Connect to Laserfiche Server*
- ✓ *Saves connection info after first configuration*

Snapshot Process

Signature:

Print Name:

Date/Time Stamp:

Laserfiche Snapshot

Document Properties | Tags | Document Handling | Text | Advanced

A new document will be exported in folder using the settings you specify below.

Document properties

Name: Signature 001 - Testing

☒ Save to the Laserfiche repository

Folder: \\zzWorkQueue\\zzzImported Documents

Volume: <Use parent folder's default volume>

☐ Export to directory: C:\\Temp\\

Template: Employee Records

Employee ID
1234

Department
Testing Dept

Position
Test Position

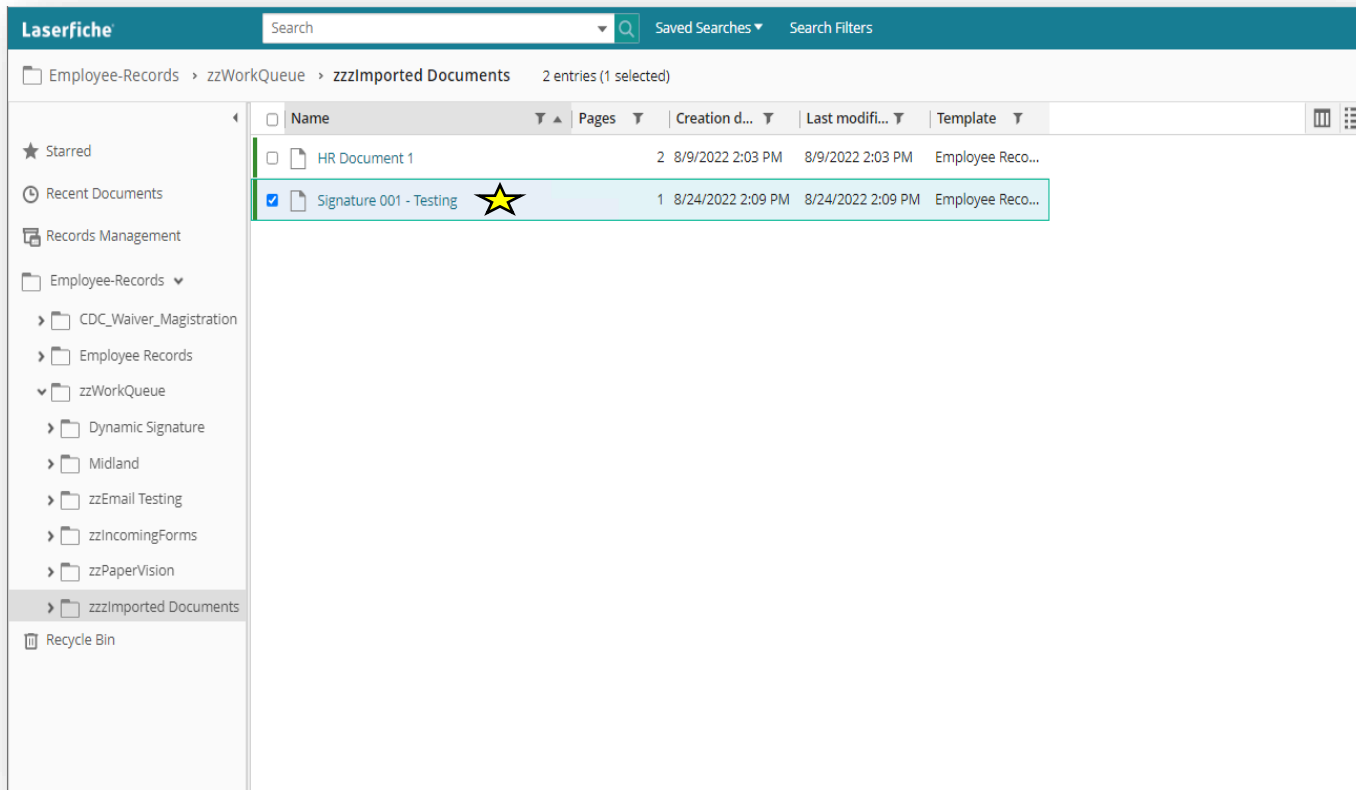
First Name
Robert

Preview | OK | Cancel | Help

Apply Information to Document

- ✓ Document Name
- ✓ Folder Path
- ✓ Template & Fields

Snapshot Process



**Document is now in
Laserfiche with
applied information**

Snapshot Process

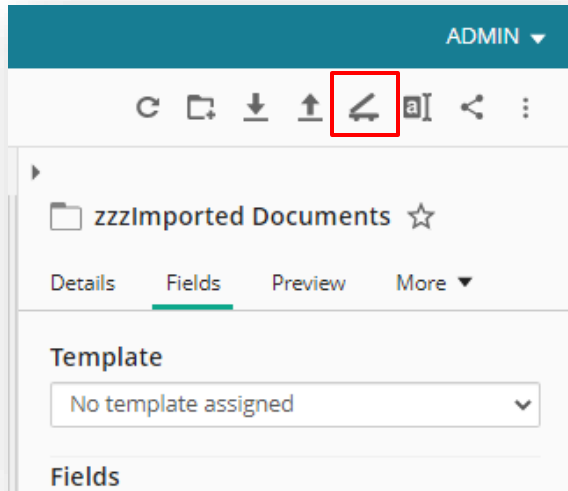
Laserfiche Scanning

Primary Uses

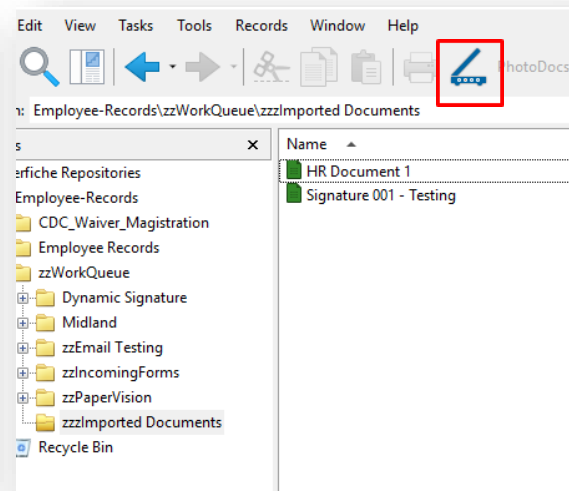
- ✓ *Scan physical document directly into Laserfiche*
- ✓ *Scan large quantities of documents*
- ✓ *Requires a desktop scanner with TWAIN drivers*



Web Client



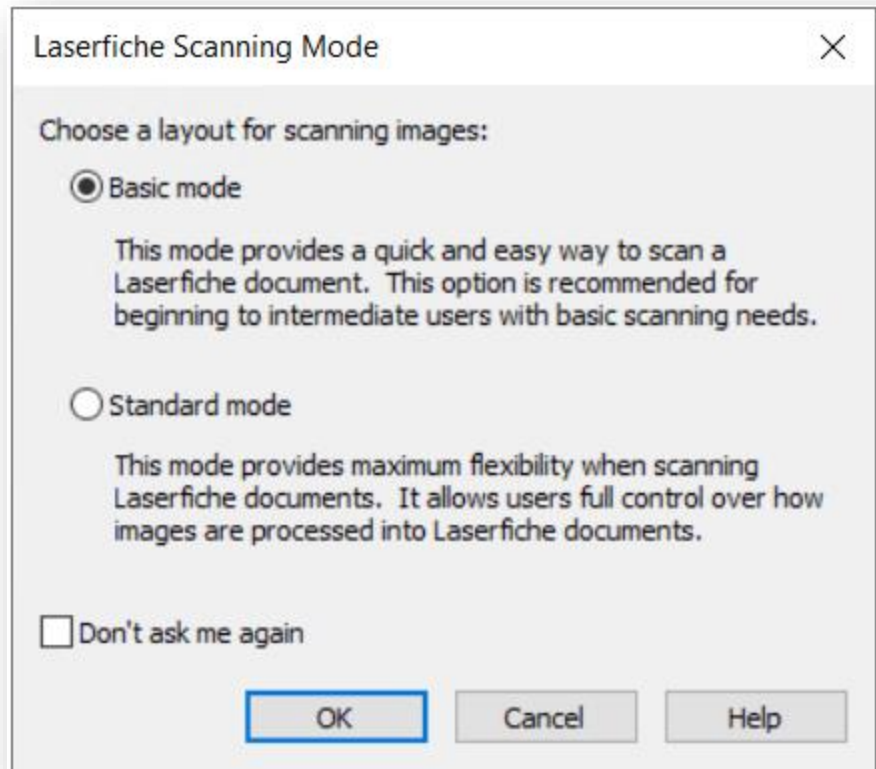
Windows Client



Importing through Laserfiche Scanning

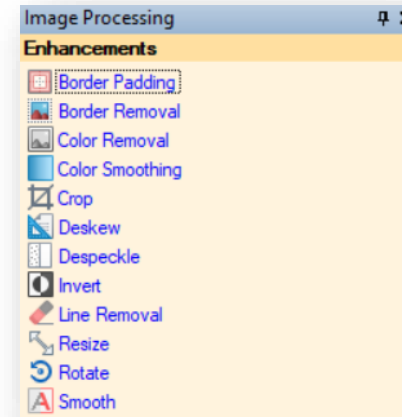
- ✓ *Select Scanning Button*
- ✓ *In the Web Client, it will prompt for a separate install*

Laserfiche Scanning

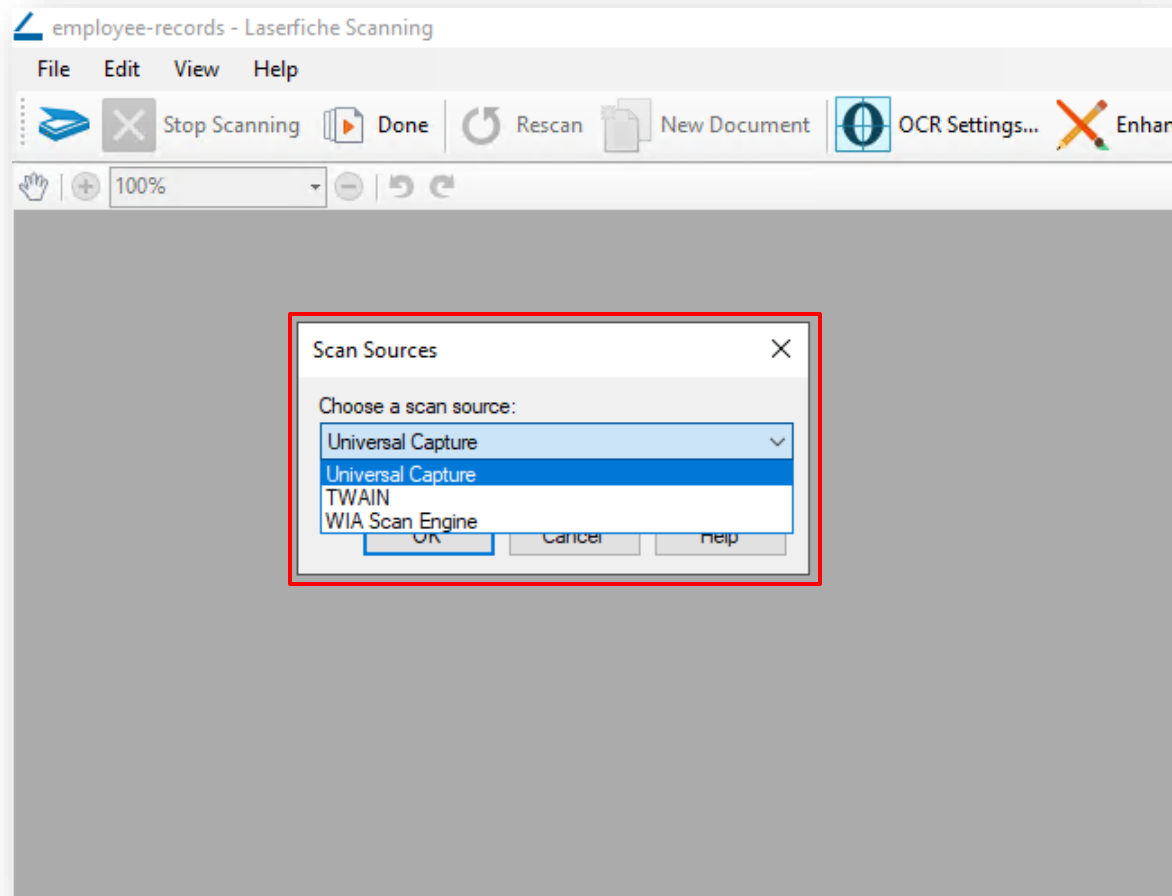


Select Scanning Mode

- ✓ *Basic Mode*
 - ✓ *Scans the document as is*
- ✓ *Standard Mode*
 - ✓ *Allows for additional modification to scans*



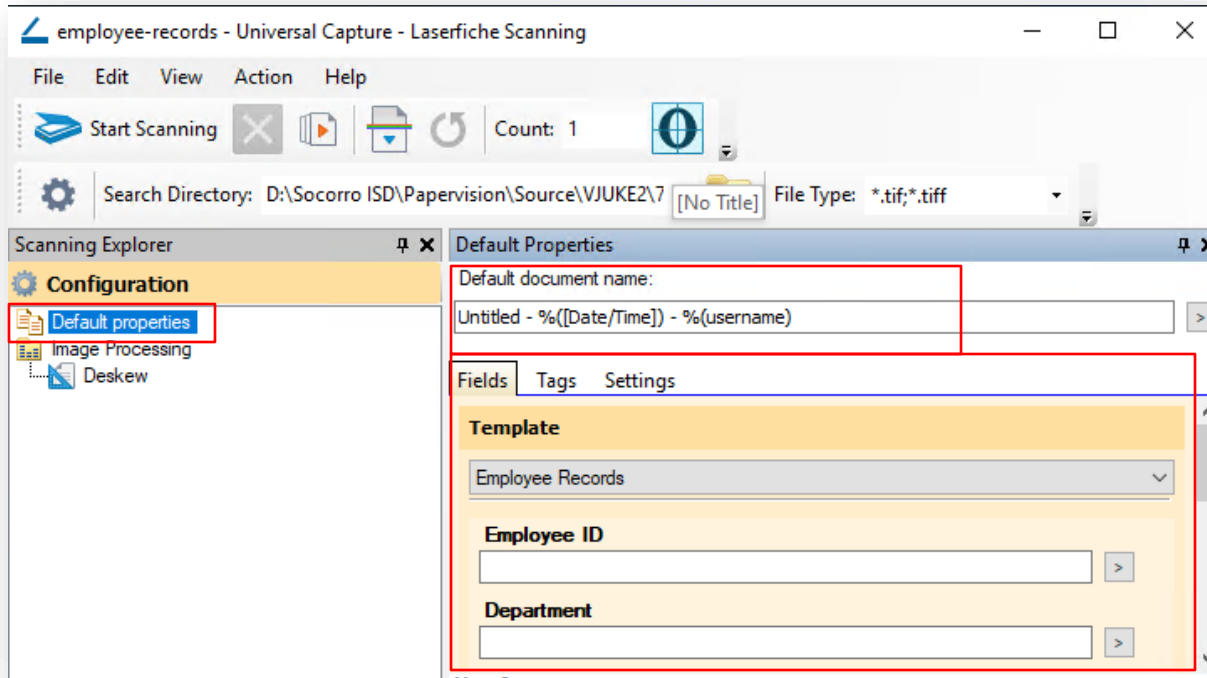
Laserfiche Scanning



Select Scanning Source

- ✓ *Universal Capture*
 - ✓ *Scans from a Windows Folder*
- ✓ *TWAIN*
 - ✓ *Scans from Desktop Scanner or Scan Source*

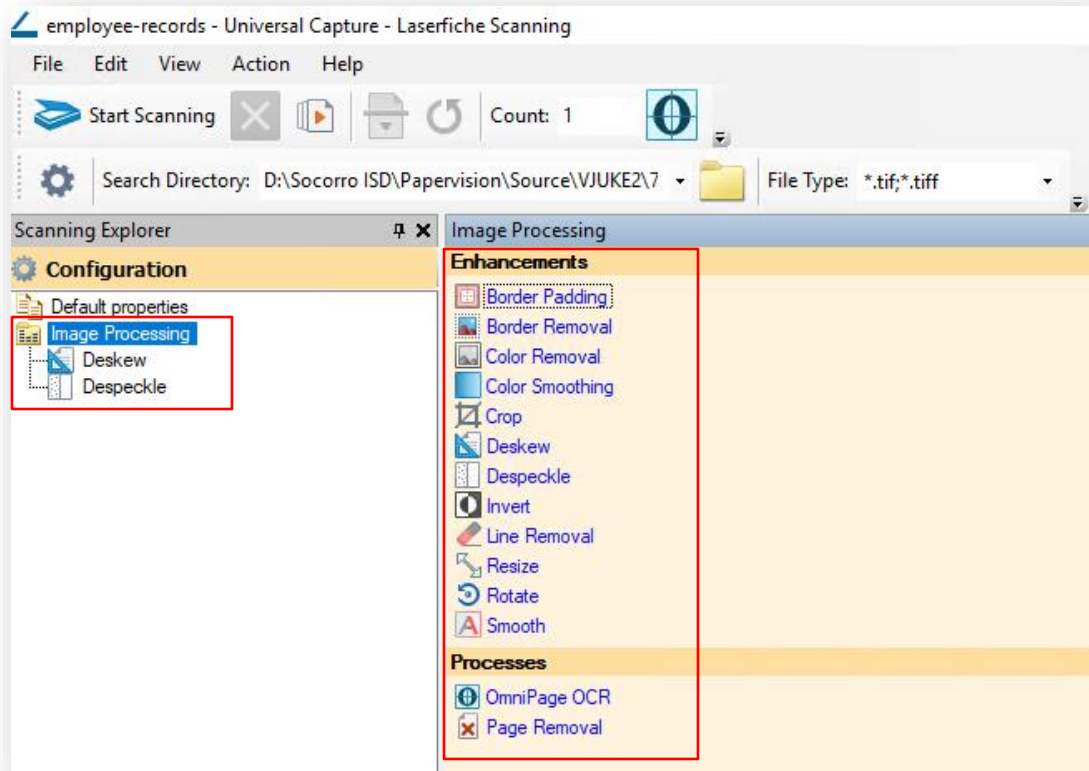
Laserfiche Scanning



Set Default Properties

- ✓ Document Name
- ✓ Template & Fields
- ✓ Folder Path in Laserfiche

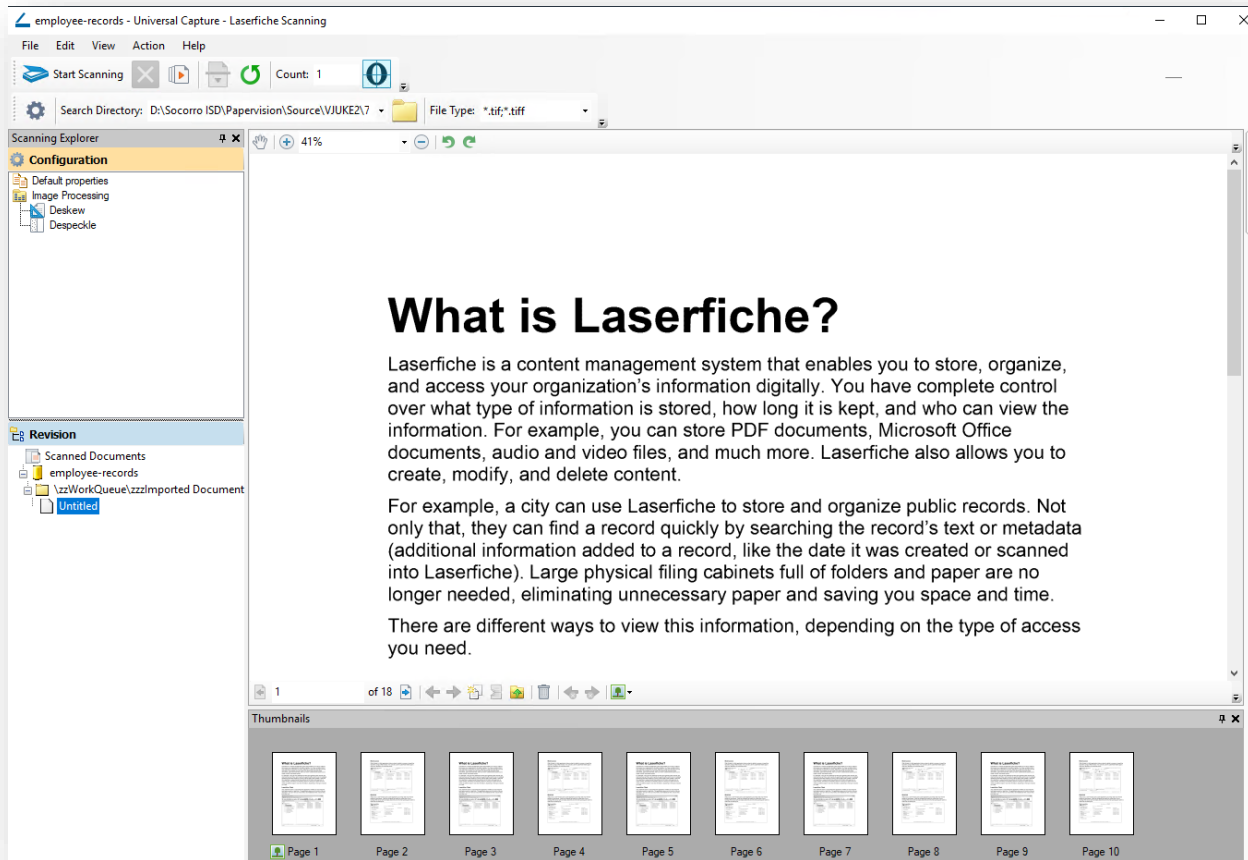
Laserfiche Scanning



Set Image Processing

- ✓ Enhancements to scanned documents
- ✓ Processes to run on documents after scan

Laserfiche Scanning



Scan & Store Documents

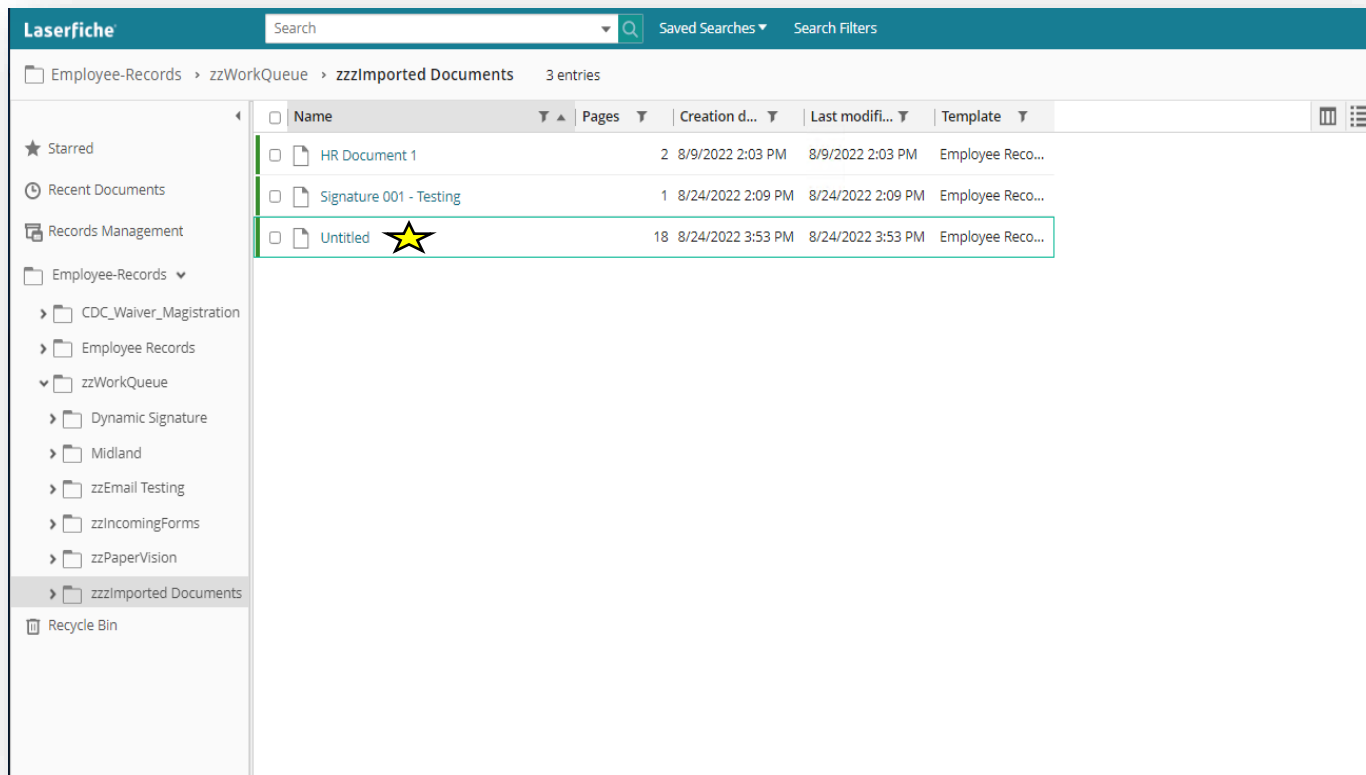
✓ *Start Scanning*



✓ *Store Documents*



Laserfiche Scanning



**Document is now in
Laserfiche with
applied information**

Laserfiche Scanning

Recap: Basic Importing



Drag & Drop – Import Button

- ✓ Simplest way to import
- ✓ Good for one-time and irregular capture



Laserfiche Snapshot

- ✓ Print or save documents directly to Laserfiche
- ✓ Good for archiving documents or saving copies of webpages



Laserfiche Scanning

- ✓ Scan physical documents directly to Laserfiche
- ✓ Good for handling batches of documents

Advanced Import Methods



Laserfiche Import Agent

- ✓ *Monitors a Windows Folders for incoming documents*
- ✓ *Automatically imports documents into Laserfiche*
- ✓ *Can apply metadata automatically*



Laserfiche Email Archiving

- ✓ *Monitors an email inbox/folder*
- ✓ *Automatically imports emails into Laserfiche*
- ✓ *Can apply metadata automatically*



Laserfiche Quick Fields

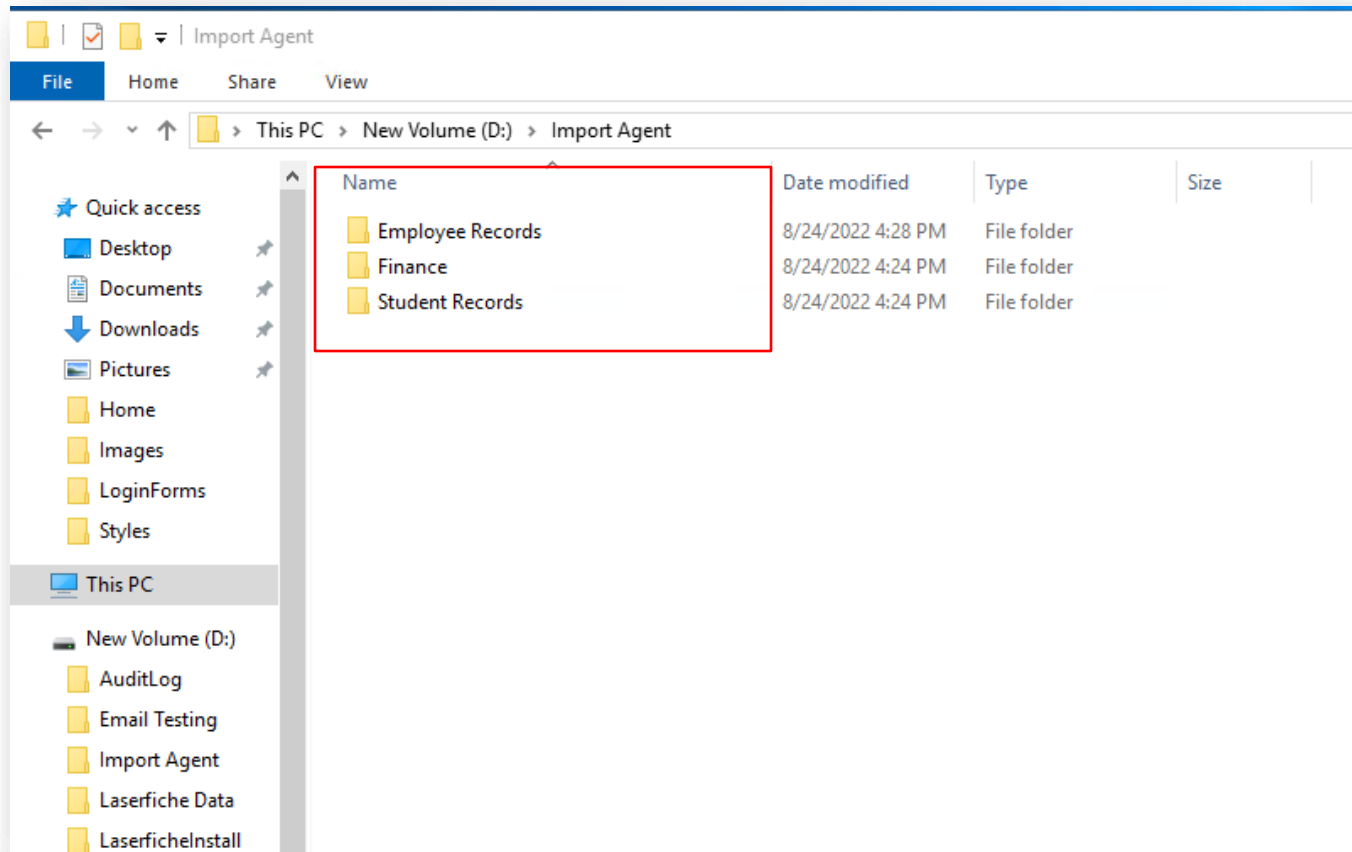
- ✓ *Reads information directly off documents*
- ✓ *Good for processing batches of similar/consistent documents*

Laserfiche Import Agent

Primary Uses

- ✓ *Automate importing documents into Laserfiche*
- ✓ *Monitor a Windows Location*
 - ✓ *Local drive or folder on server*
 - ✓ *Network drive*
- ✓ *Import large batches of documents*
- ✓ *Automatically convert electronic documents to Laserfiche pages*
- ✓ *Automatically apply metadata to documents at import*



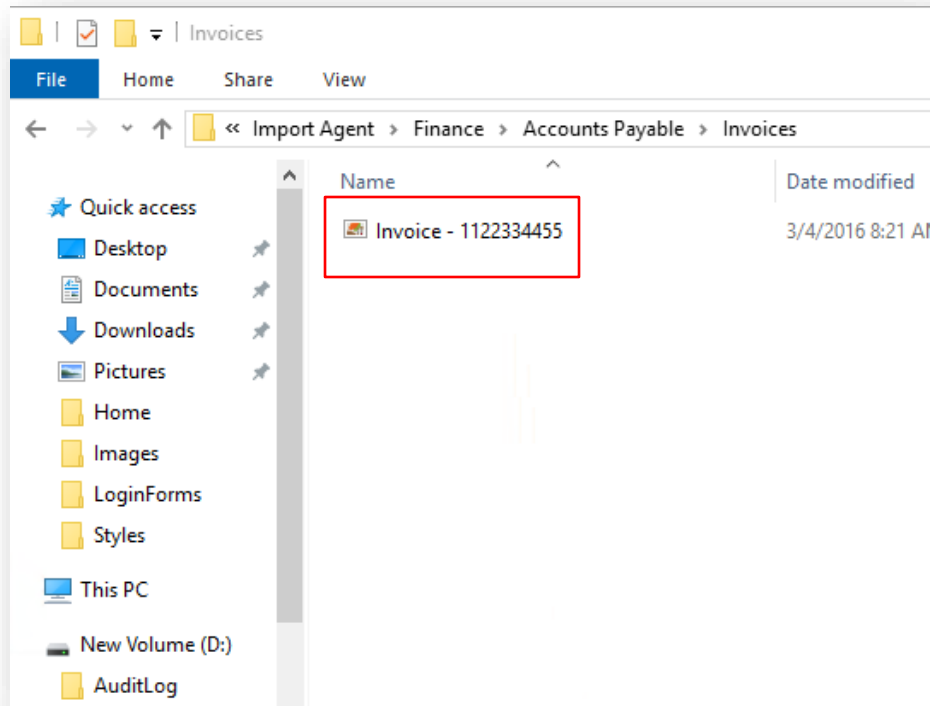


Monitor a folder with Import Agent

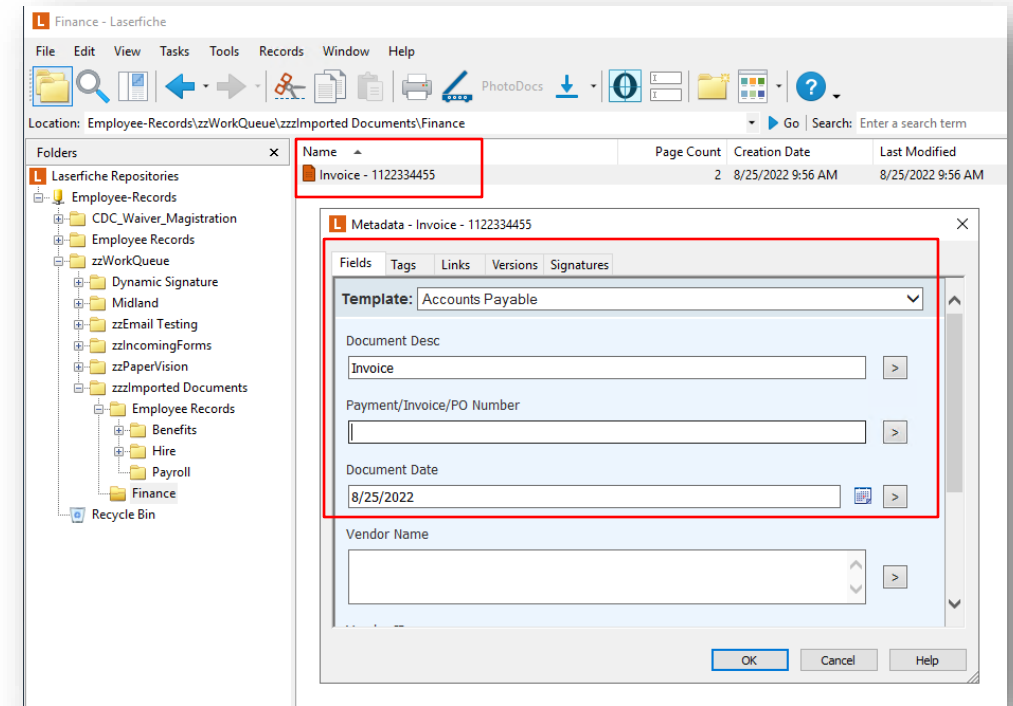
- ✓ *Pick a folder to monitor*
- ✓ *Select Repository connection*
- ✓ *Select path in Laserfiche to import documents*

Import Agent – Monitor Folder

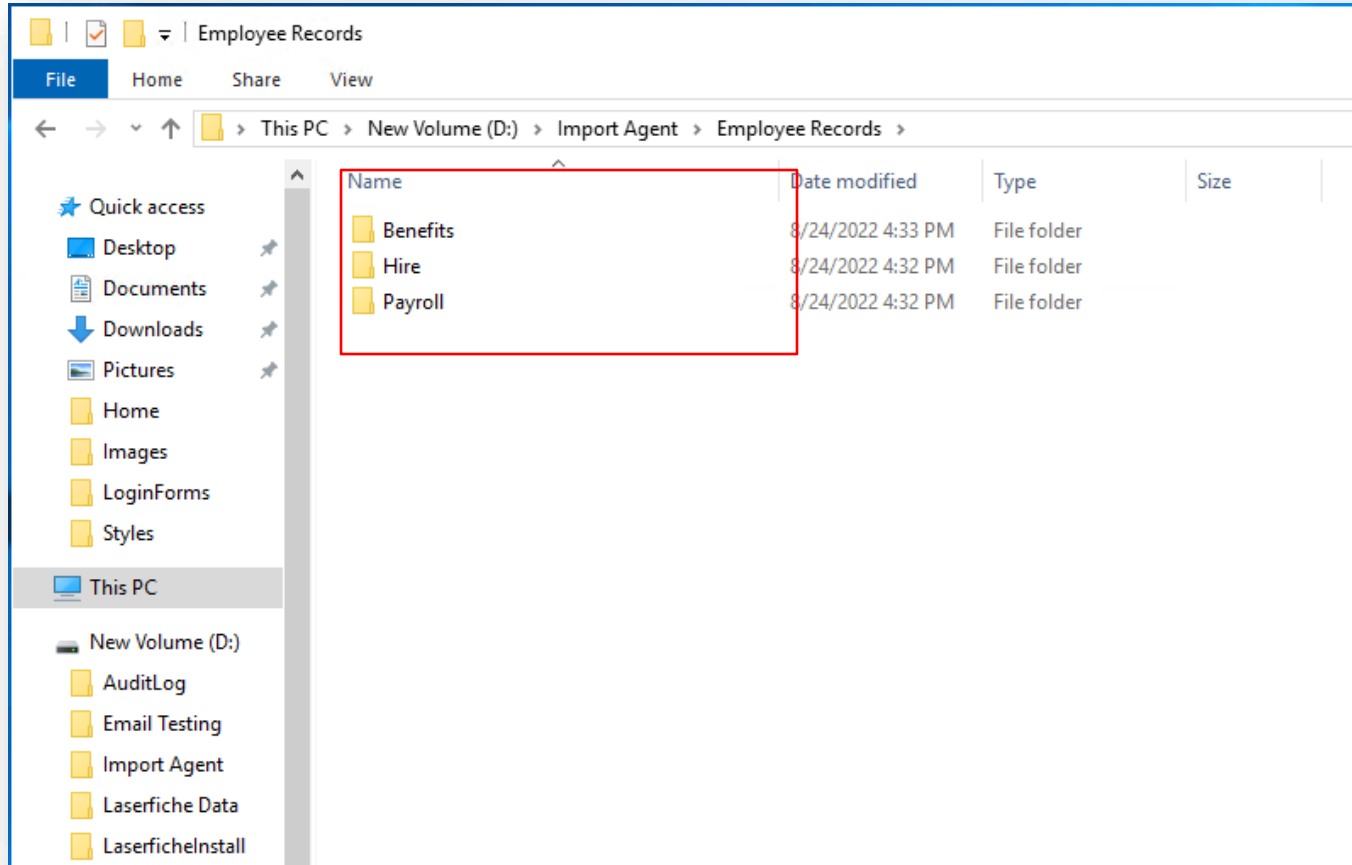
Windows Path



Laserfiche Path



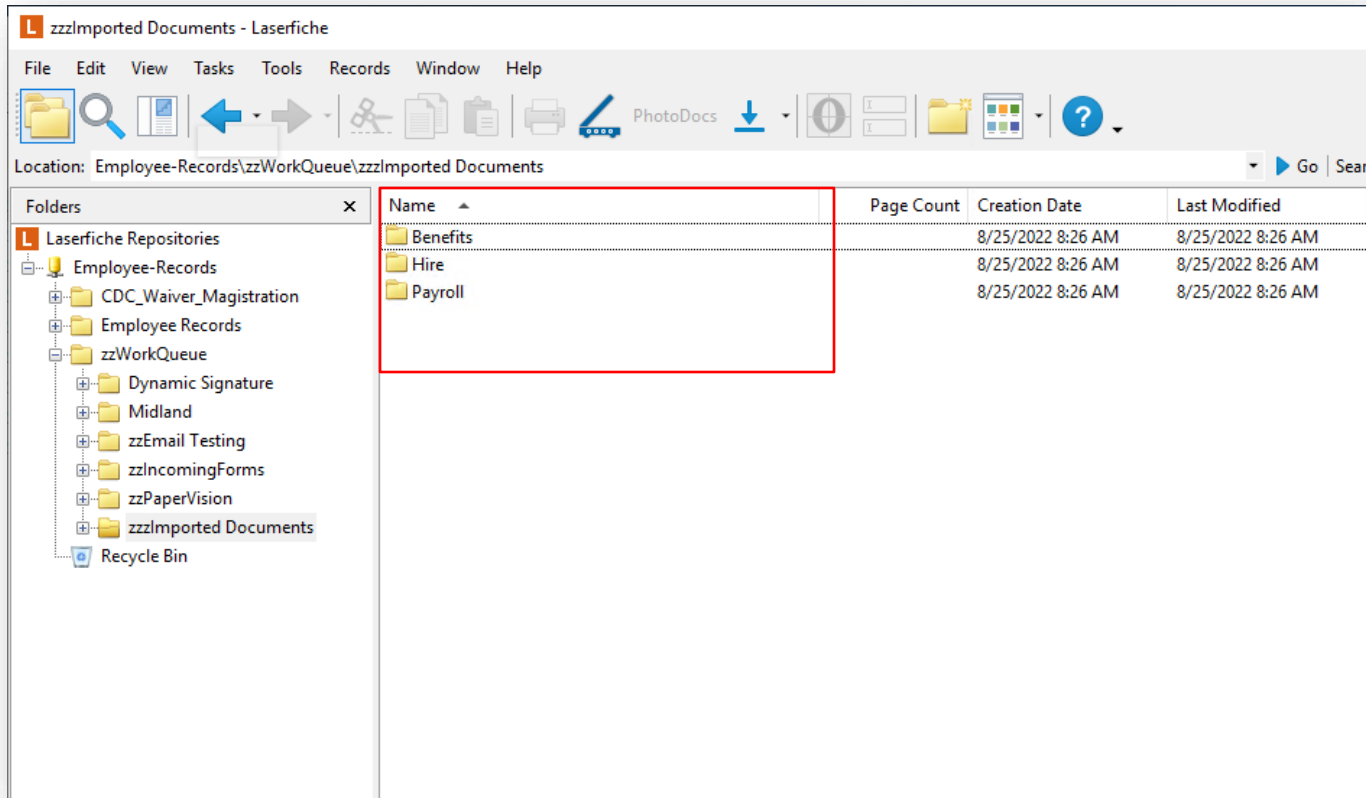
Import Agent – Imported Folder



Monitor subfolders with Import Agent

- ✓ *Monitor subfolders below the main folder*
- ✓ *Use subfolders to capture more information*
- ✓ *Use subfolders to route documents differently*

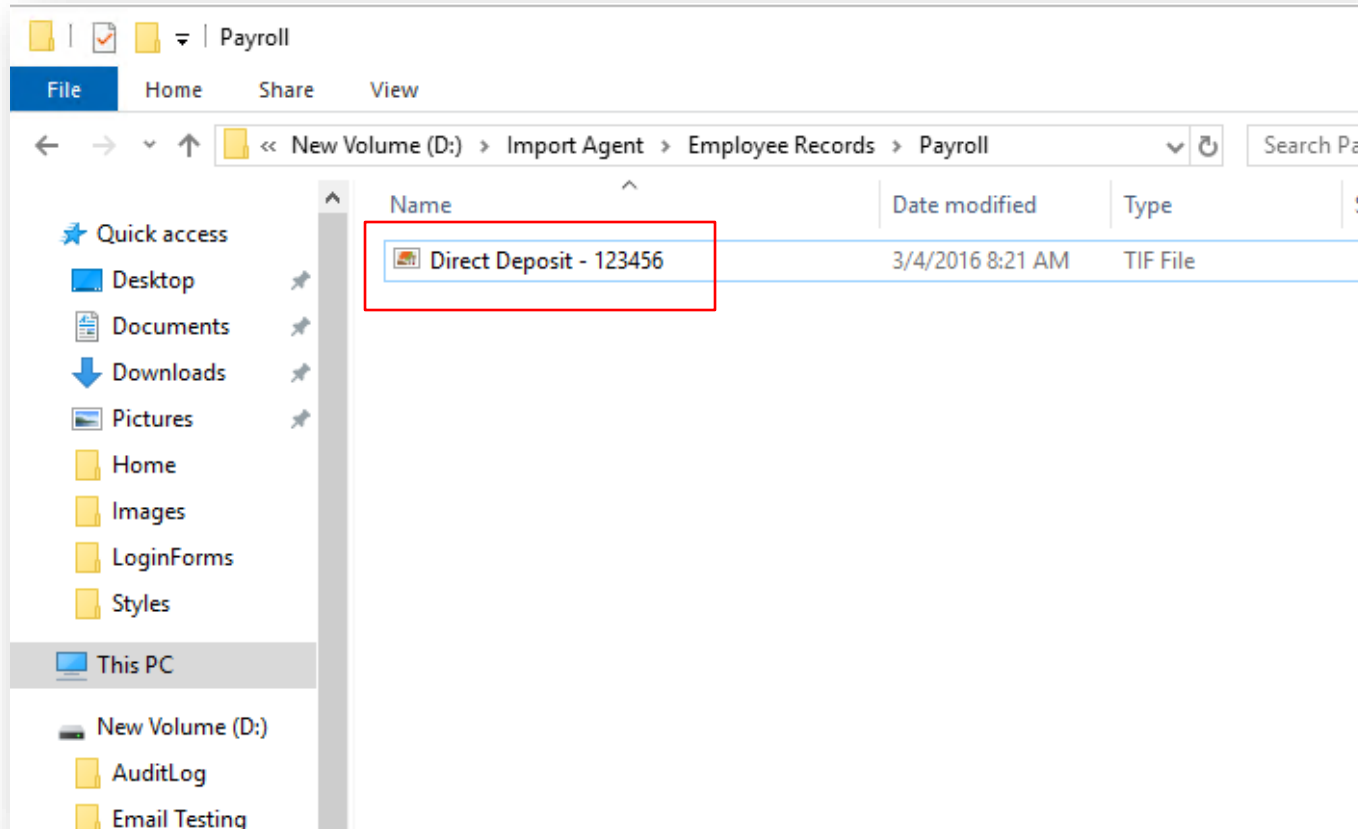
Import Agent – Monitor Subfolders



Automatically create subfolders in Laserfiche

- ✓ *Monitored subfolders get created in Laserfiche*
- ✓ *Documents get routed to subfolders in Laserfiche accordingly*

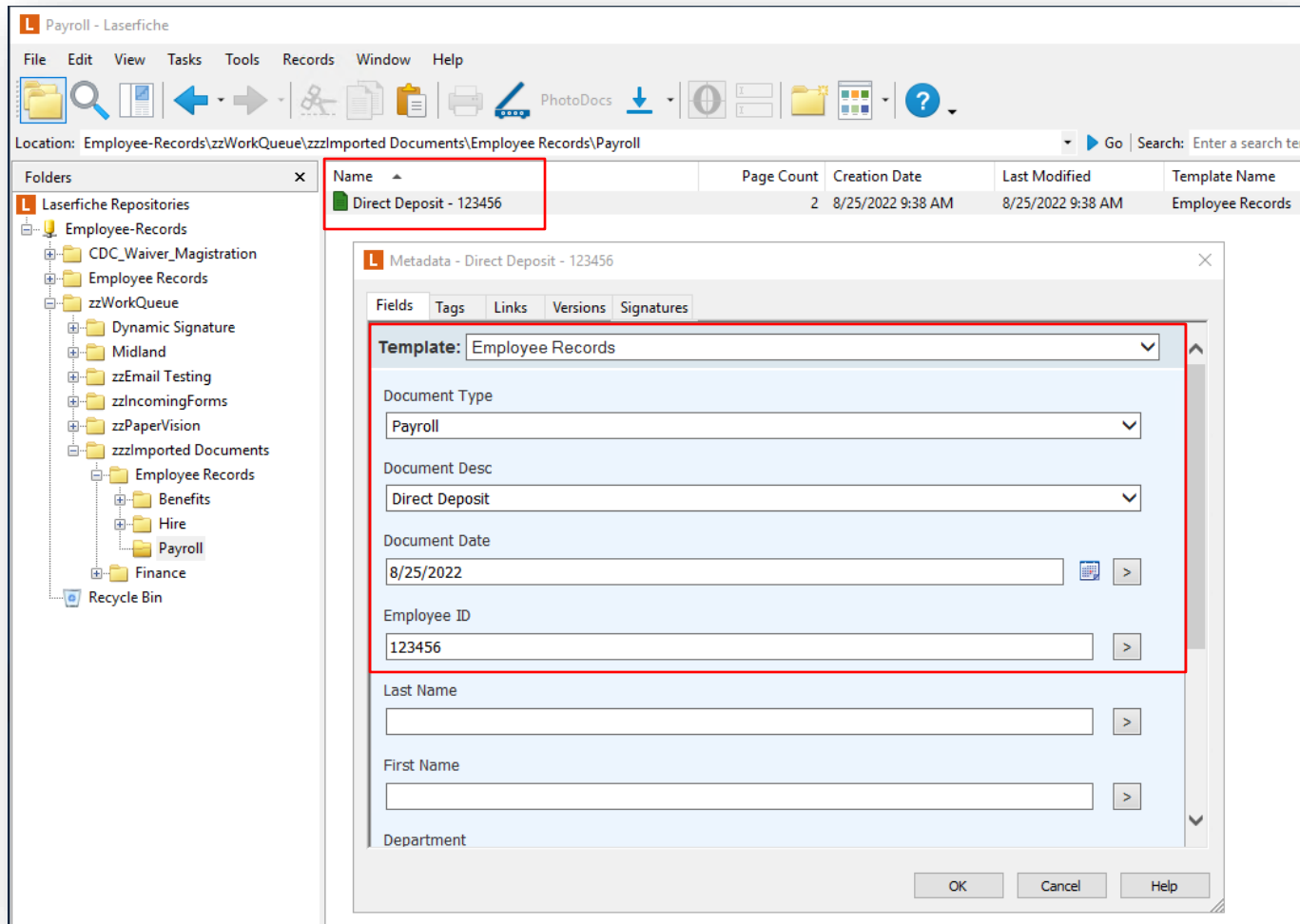
Import Agent – Imported Subfolders



File Name can be used as metadata

- ✓ Pull information directly from file name
 - ✓ Type of document – Direct Deposit
 - ✓ Employee ID – 123456

Import Agent – File Name



File Name can be used as metadata

- ✓ Information is automatically assigned to fields
- ✓ This information can be used in Workflow to further process documents

Import Agent – File Name

Laserfiche Import Agent

Other Information that can be Captured

- ✓ *Full File Path*
- ✓ *File Type or Extension*
- ✓ *Creation Date*
- ✓ *Last Modified Date*
- ✓ *Created By*



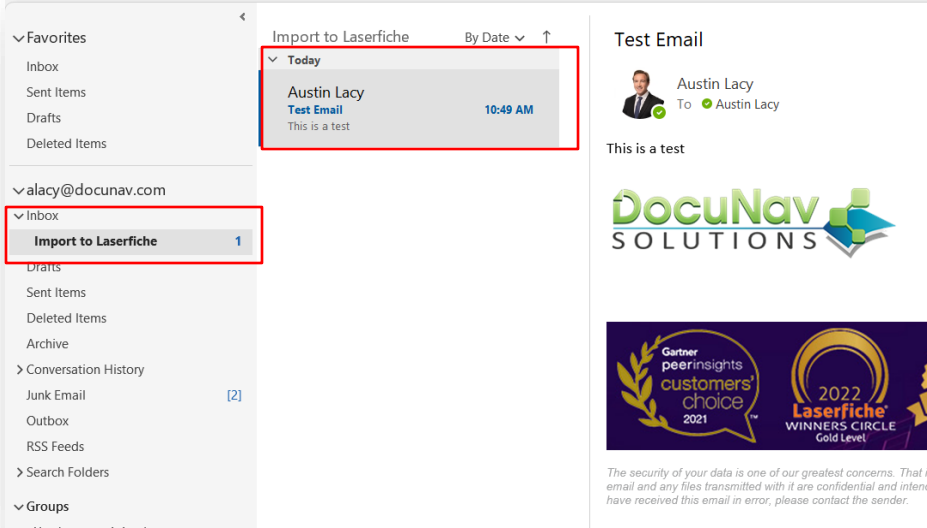
Laserfiche Email Archiving

Primary Uses

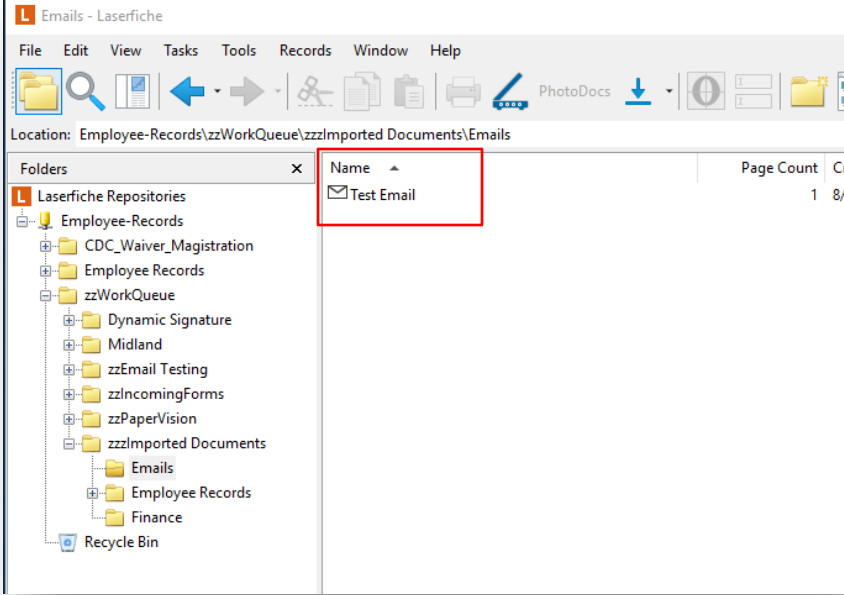
- ✓ *Automate importing emails into Laserfiche*
- ✓ *Monitor an Inbox*
 - ✓ *Entire Inbox*
 - ✓ *Subfolders inside Inbox*
- ✓ *Import large batches of emails*
- ✓ *Automatically archive emails that cannot be edited*
- ✓ *Automatically apply email information to archived emails*
 - ✓ *Sender*
 - ✓ *Receiver*
 - ✓ *Date*
 - ✓ *Title/Subject*



Email Folder



Laserfiche Path



Email Archiving

Laserfiche Email Archiving

Considerations

- ✓ *Marks imported emails as "read"*
- ✓ *Moves imported emails to a separate "processed" folder*
- ✓ *Best practice is to set Email Archiving to monitor subfolders*
 - ✓ *Especially for active email addresses*
 - ✓ *Prevents Email Archiving altering entire inboxes*



Laserfiche Quick Fields

Primary Uses

- ✓ Automate importing documents into Laserfiche
- ✓ Grab documents from a Windows Location or Laserfiche Folder
 - ✓ Local drive or folder on server
 - ✓ Network drive
 - ✓ Folder inside of Laserfiche
- ✓ Scan/Import large batches of documents
- ✓ Read information directly off documents using OCR
 - ✓ Identifying information on Document Class
 - ✓ Specific Information/Metadata
- ✓ Very useful for importing batches of consistently formatted documents
 - ✓ Transcripts & Report Cards
 - ✓ Invoices, Purchase Orders, and Checks



nts > Tanner Demo Server > AP-Finance > Samples

Name	Date modified	Type	Size
 Invoice - Teller Automotive Invoice_1518...	4/22/2022 9:19 AM	Microsoft Edge P...	142 KB
 Teller Automotive Repair - PO 22345.pdf	4/22/2022 9:19 AM	Microsoft Edge P...	115 KB
 Teller Automotive Payment.pdf	4/22/2022 10:09 AM	Microsoft Edge P...	107 KB

Select Location to Import & Scan documents from

- ✓ *Windows Folder Location*
 - ✓ *Local File Location*
 - ✓ *Network Location*
- ✓ *Laserfiche Folder*

Quick Fields – Capture Folder

Teller Automotive & Co.



545 Best Repair St.
Fixitright, TX 32145
Phone: 972-111-1212

INVOICE #: 151821
DATE: 09/20/2021

TO:
United Schools ISD
3341 Howard Blvd.
Richmond, TX
Phone: 214-123-3456

SHIP TO:
Business Office
c/o: Ray Sternly
United Schools
3341 Howard Blvd.
Richmond, TX
Phone: 214-123-3456

COMMENTS OR SPECIAL INSTRUCTIONS:
Broken Front Axle Repair;

SENIOR TECH	P.O. NUMBER	REQUISITIONER	SHIPPED VIA	F.O.B. POINT	TERMS
Jim Johnson	22345	Anita Miller	n/a	n/a	Due on receipt

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
1	Front Axle Replacement	335.00	335.00
1	Labor (FIXED)	385.55	385.55
1	Tow > 20_Miles	100.00	100.00

SUBTOTAL \$820.55

SALES TAX \$67.70

SHIPPING & HANDLING n/a

TOTAL DUE \$888.25

Make all checks payable to Teller Automotive & Co.

If you have any questions concerning this invoice, contact Name, Phone, Email

THANK YOU FOR YOUR BUSINESS!

Capture Information

- ✓ Invoice
- ✓ Invoice Number
- ✓ Invoice Date
- ✓ Invoice Amount
- ✓ Vendor Name/Number

Quick Fields – Invoice

CHECK# 123456		CHECK DATE 09/26/2021		VENDOR# 6055
Account	Purchase Order	Invoice Number	Description	Amount
123456789	22345	151821	Teller Automotive	\$888.25



DocuNav
Independent School District

DocuNav Independent School District
Frisco, TX 75034

Check Date	Check Number
09/26/2021	123456

Amount \$888.25

PAY THE SUM OF EIGHT HUNDRED EIGHTY EIGHT DOLLARS & TWENTY FIVE CENTS

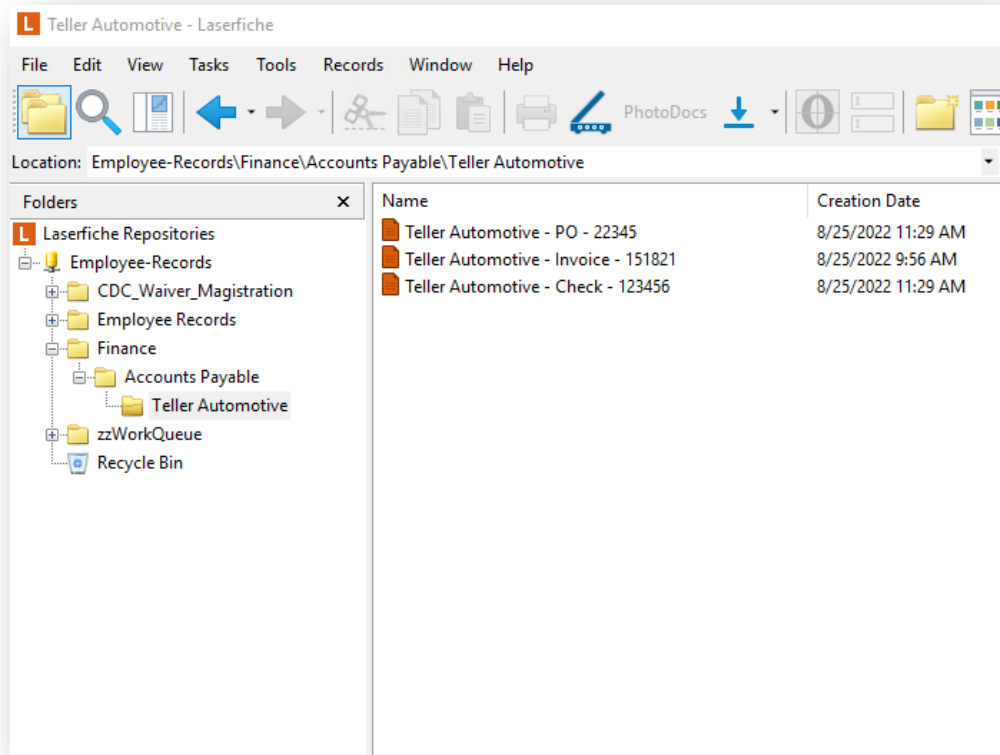
TO THE
ORDER OF

Teller Automotive & Co.
545 Best Repair St.
Frisco, TX 75034

Capture Information

- ✓ Check
- ✓ Check Number
- ✓ Check Date
- ✓ Check Amount
- ✓ Vendor Name/Number

Quick Fields – Check



Automatically Process Documents

- ✓ *Using captured data, documents get automatically imported and filed into archival folders*

Quick Fields – Automation

Laserfiche Quick Fields

Considerations

- ✓ *Quick Fields does not actively monitor folders w/o Quick Fields Agent*
- ✓ *OCR is only as accurate as the quality of document images*



Full Recap

Basic/Manual Methods to Import Documents

- ✓ *Drag & Drop – Import Button*
- ✓ *Snapshot*
- ✓ *Scanning*

Advanced/Automated Methods to Import Documents

- ✓ *Import Agent*
- ✓ *Email Archiving*
- ✓ *Quick Fields*

Questions?

THANK YOU!

