

Laserfiche 101

A BEGINNER'S GUIDE TO LASERFICHE

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DOCUNAV SOLUTIONS

| Tanner Kos
BUSINESS DEV REP
DOCUNAV SOLUTIONS

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Sales Engineer/Trainer
DocuNav Solutions

Moderator



Tanner Kos
Business Dev Rep
DocuNav Solutions

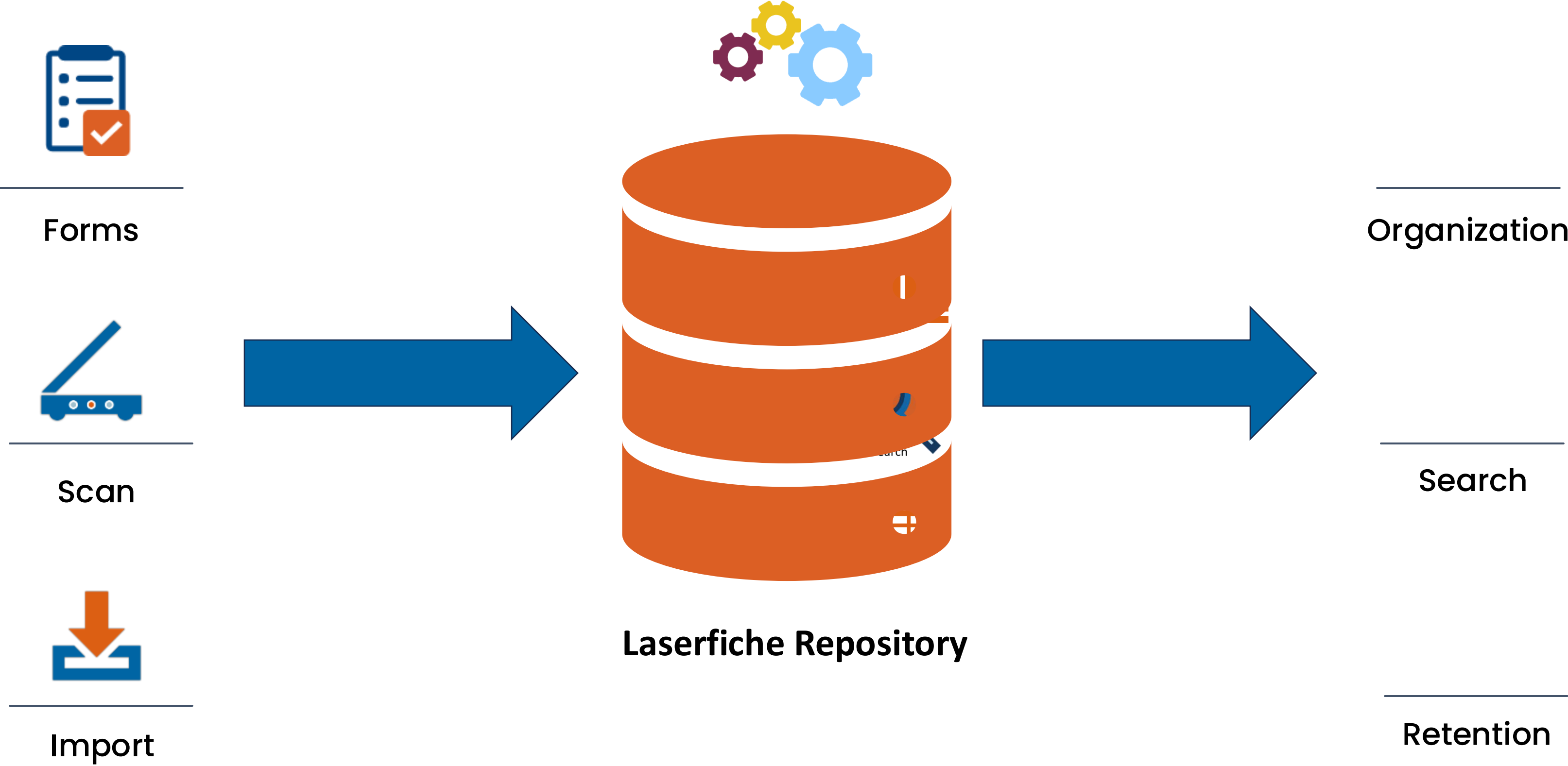
How you felt in your records room?



How you felt in your records room?

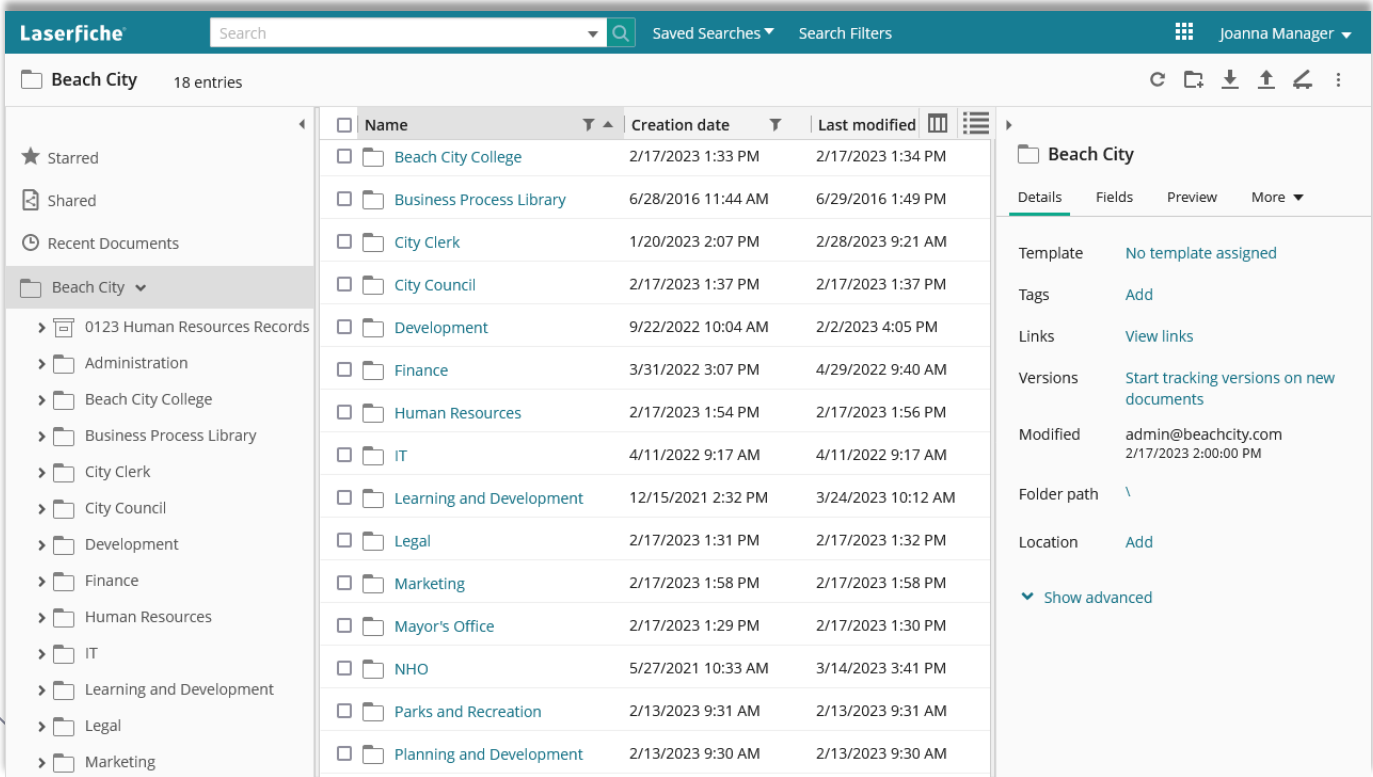


What is Laserfiche and what can it do?

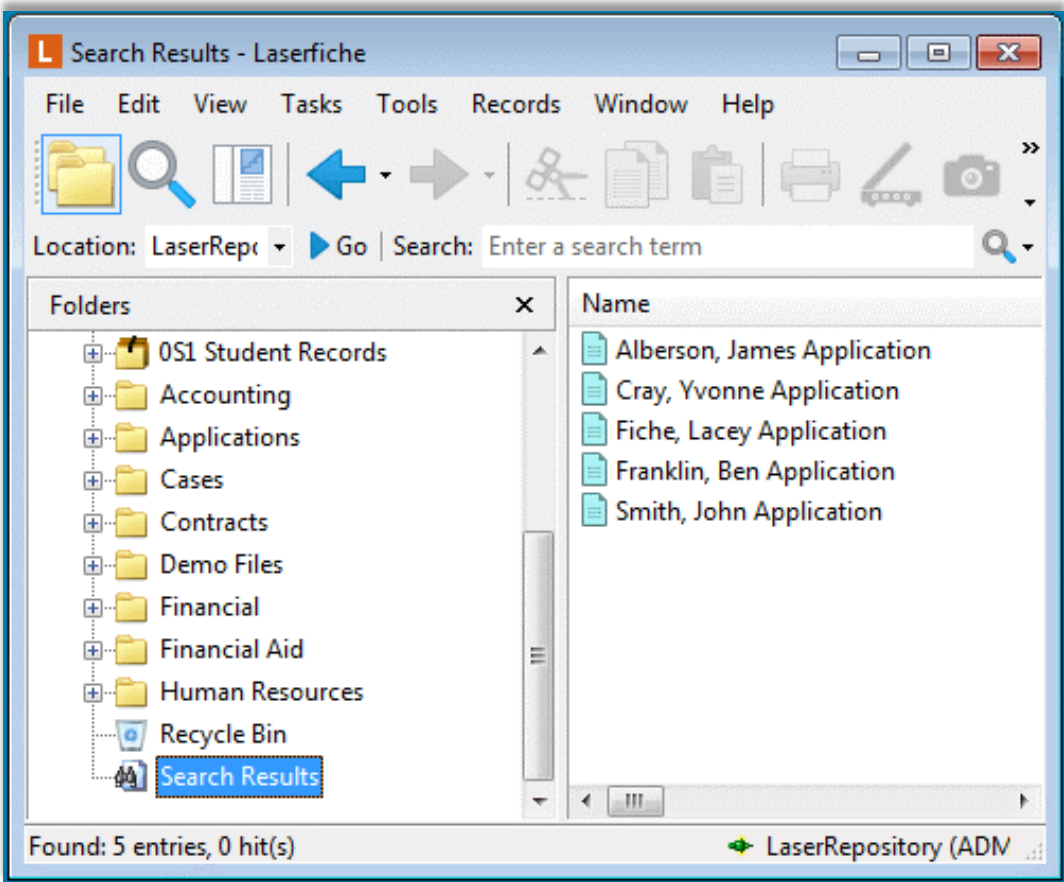


Accessing Your Laserfiche Repository

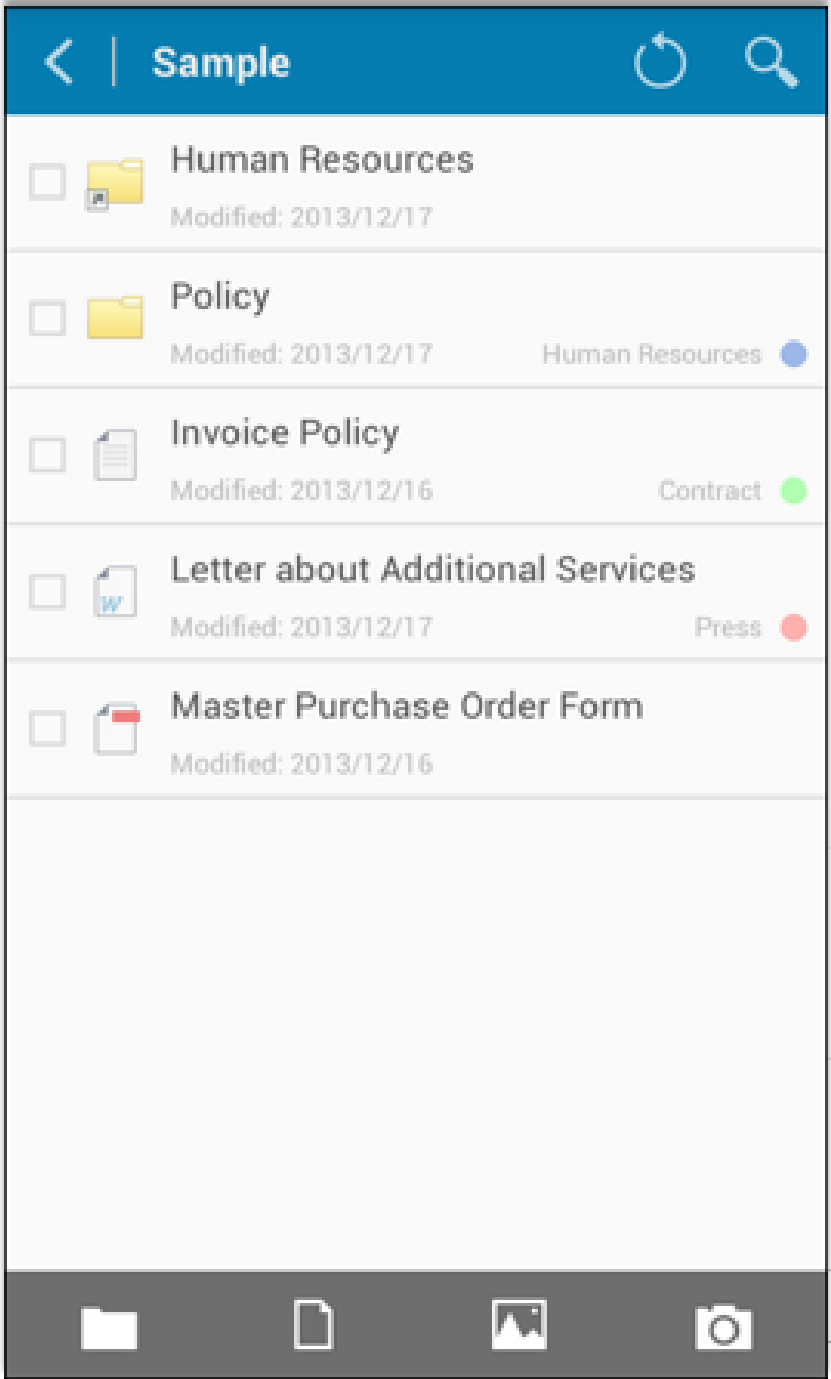
Web Client

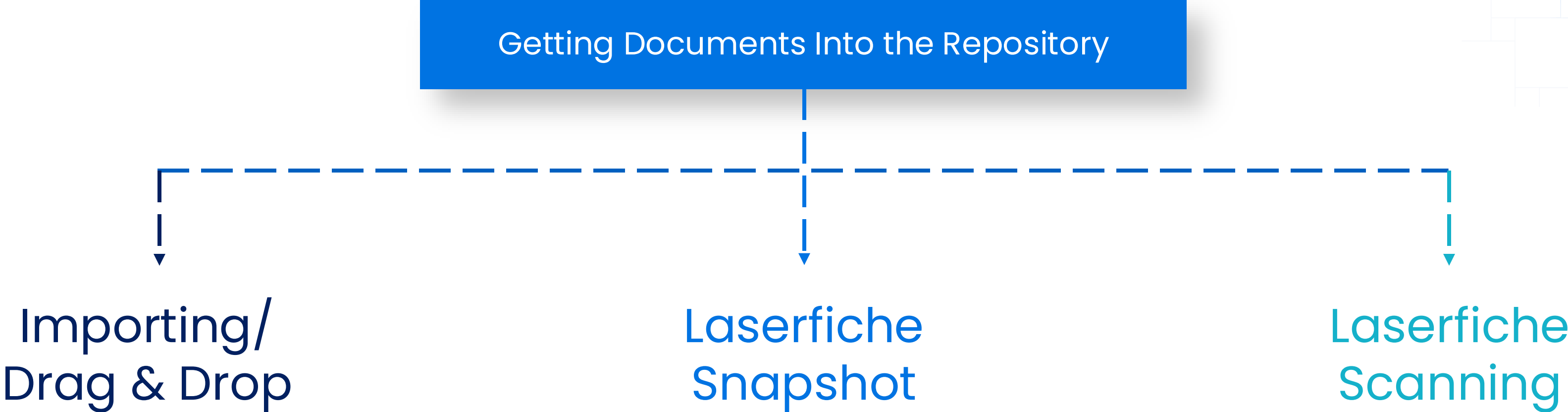


Windows Client



Mobile App





LASERFICHE
SCANNING

Laserfiche Snapshot

Document Properties | Tags | Document Handling | Text | Advanced

A new document will be created in Laserfiche using the settings you specify below.

Document properties

Name: Document1

☒ Save to the Laserfiche repository

Folder: \

Volume: <Use parent folder's default volume>

☐ Export to directory: C:\Temp\

Template: No template assigned

Add/Remove Fields...

Preview

OK

Cancel

Help



LASERFICHE
SNAPSHOT

Universal Capture - Laserfiche Scanning

File Edit View Action Help

Start Scanning Count: 1

Search Directory: C:\Users\joanna.bauer\Downloads\TEMP File Type: *.tif;*.tiff

Scanning Explorer

Configuration

Default properties

Image Processing

Revision

Scanned Documents

Legal\Review Guidelines\

NDA Review Guidelines

Image Processing

Enhancements

Border Padding

Border Removal

Color Removal

Color Smoothing

Crop

Deskew

Despeckle

Invert

Line Removal

Resize

Rotate

Smooth

Bill To:

John Smith

Smith Company Inc

1234 Place Street

Los Angeles, CA 90806

323.123.4567

Ship To:

John Smith

Smith Company Inc

1234 Place Street

Los Angeles, CA 90806

323.123.4567

Universal Capture - Laserfiche Scanning

File Edit View Help

Stop Scanning Done Rescan New Document OCR Settings... Enhancements...

Search Directory: C:\Users\joanna.bauer\Downloads\TEMP File Type: *.tif;*.tiff

50%

Name: NDA Review Guidelines Folder: Volume

Basic Contract Information

- Review the entire contract, including all attachments, exhibits and/or appendices.
- Is the correct name of each party included?

Length of Contract

- Does the contract have a start date?
- Does the contract have an end date?
- Does the contract only renew when agreed upon by the parties?

Other Contract Terms

- Do the terms and conditions of the contract accurately reflect the final agreements, understandings and negotiations of the parties?

Document Properties

Document name: NDA Review Guidelines

Fields Tags Settings

Template:

Date Issued: 1/2/2014

Issuing Body: Legal

Last Updated: 1/2/2023

Description: Guidelines for reviewing non-disclosure agreements.

More Options: Store New Document Rescan

Page 1 of 1 Image: 7550 x 1100 300 X 300 DPI

LASERFICHE
SCANNING

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Universal Capture - Laserfiche Scanning

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Search Directory: C:\Users\joanna.bauer\Downloads\TEMP File Type: *.tif;*.tiff

Scanning Explorer

Configuration

Default properties

Image Processing

Revision

Scanned Documents

Legal\Review Guidelines\

NDA Review Guidelines

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Page 1 of 1 Image: 7550 x 1100 300 X 300 DPI



LASERFICHE
SNAPSHOT

Working with Documents in Laserfiche

Document Viewer

Search

Annotations Tools

Toolbar

Back

Search in document

Previous

Next

Johnna Manager

NDA Review Guidelines

Annotations Tools

Toolbar

1 / 1

Fit width

Annotations Tools

1

NDA REVIEW GUIDELINES

Every non-disclosure agreement should:

1. Carefully and specifically define the nature of the confidential information to be and whether such information will or must be labeled confidential;

2. Set forth the ownership rights to the information disclosed;

3. Describe the purpose behind the disclosure of the confidential information;

4. Enumerate the information which is not to be considered confidential, such as information already in

NDA Review Guidelines

Details

Fields

Annotations

More

Template

Policies

Date Issued

1/2/2014

Issuing Body

Legal

Last Updated

1/2/2023

Description

Template & Metadata

Metadata: What is it and how is it used?

- Template: Pre-defined structure of fields
- Fields: Containers of information
- Tags: Informational or Security
- Links/Relationships: Tying related files together
- Versions: Tracking changes to document

Document Details Pane

NDA Review Guidelines

Details

Fields

Annotations

More

Template

Policies

Date Issued

1/2/2014

Issuing Body

Legal

Last Updated

1/2/2023

Description

Guidelines for reviewing non-disclosure agreements.

Fields

Add/remove fields

No additional fields assigned

Links

Document Relationships

Create link

Purchase Order

Digital Group - Purchase Order 12222

Folder path

\Finance\Accounting\Accounts Payable\Purchase Orders\Digital Group

Reverse relationship

Invoice

Document Details Pane

NDA Review Guidelines

Details

Fields

Annotations

More

Template

Policies

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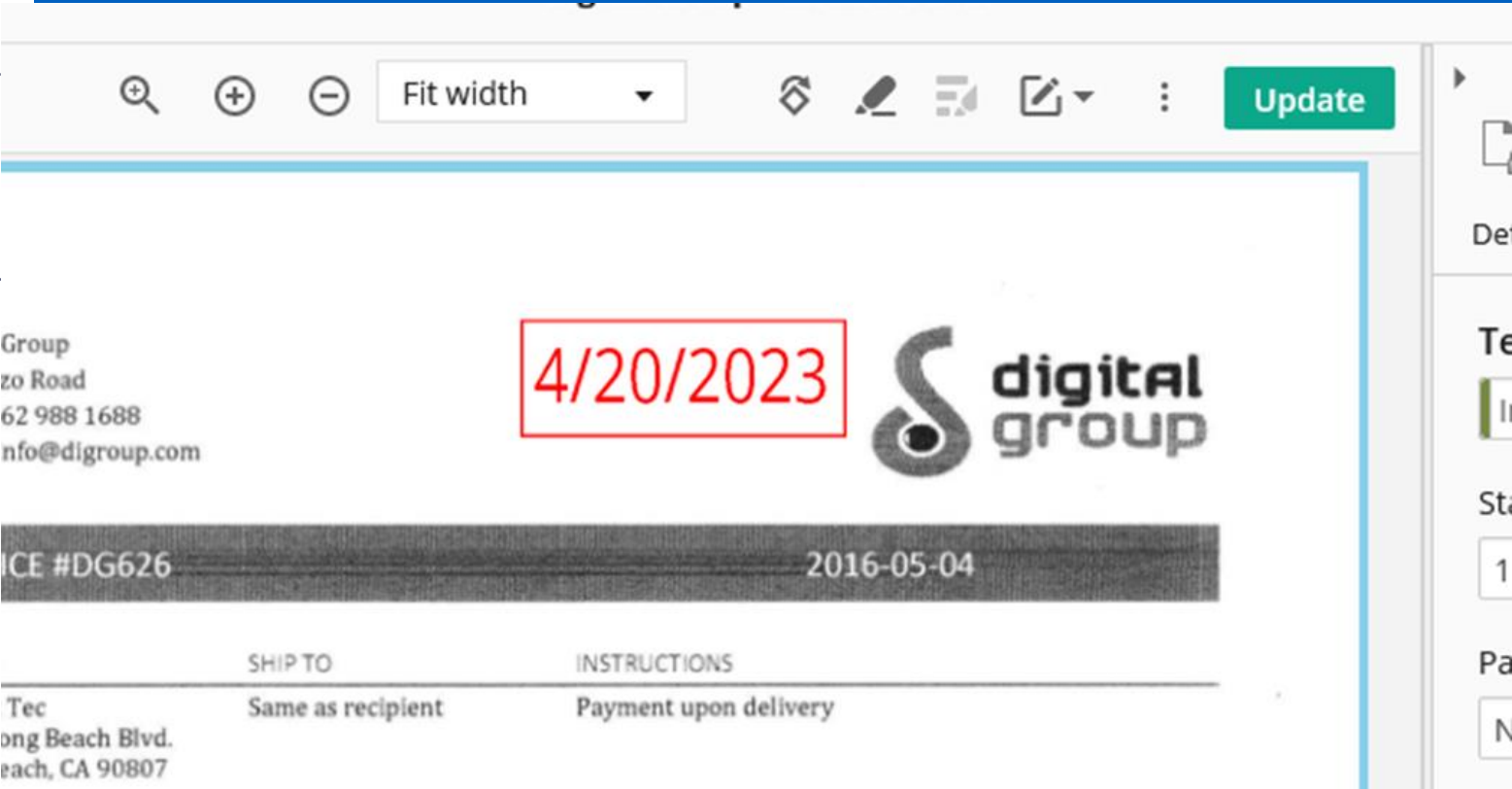
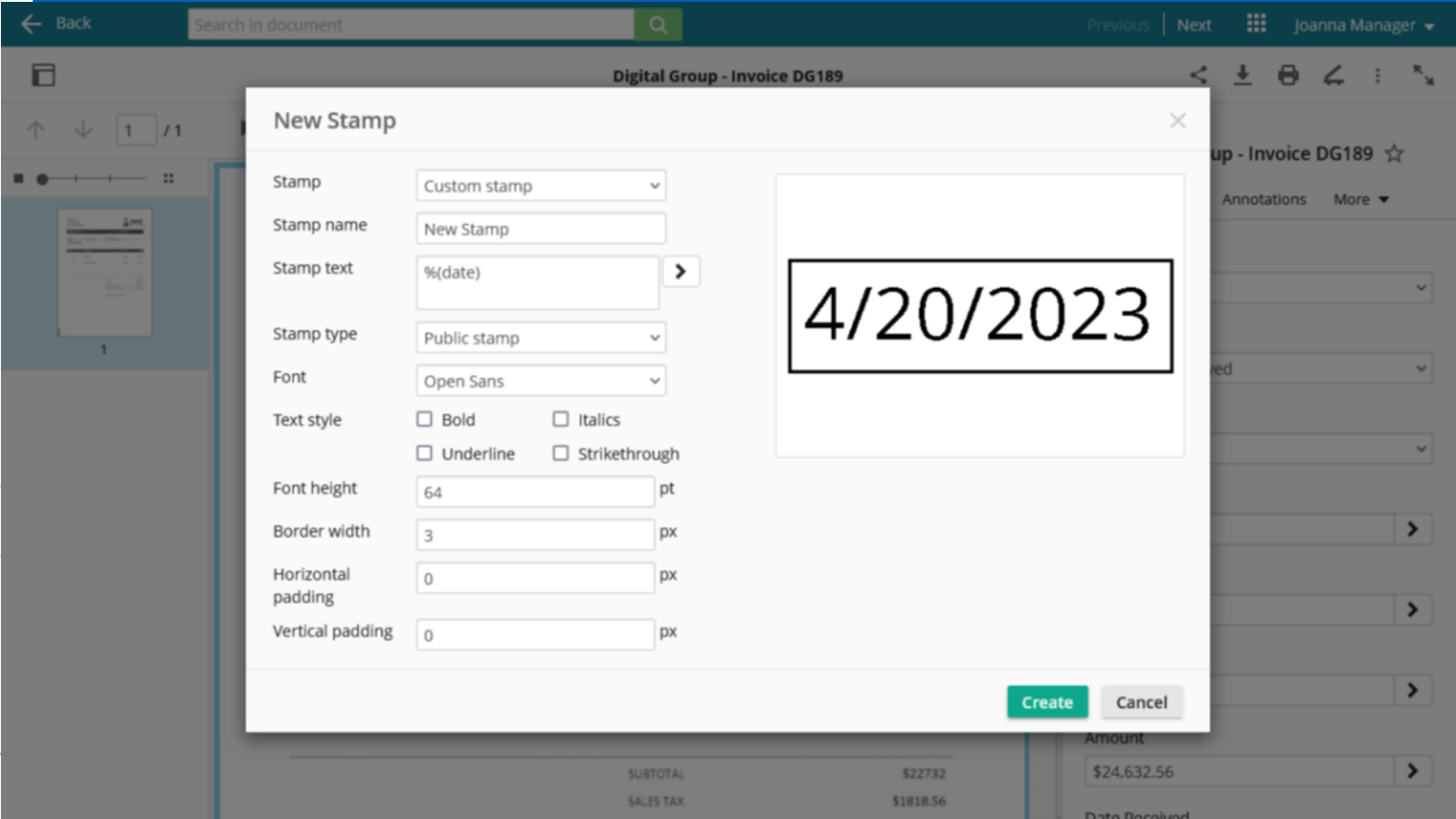
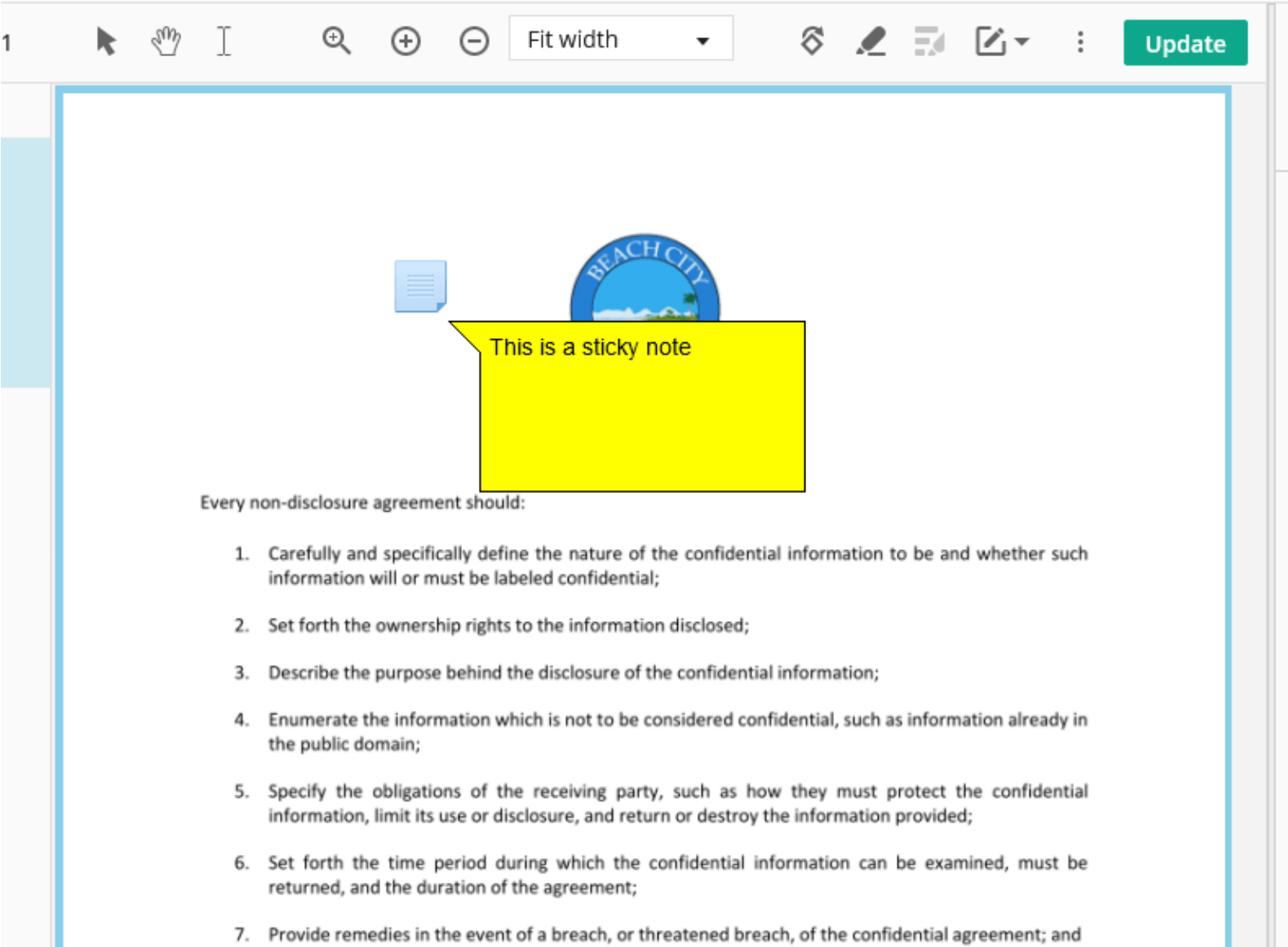
Folder path

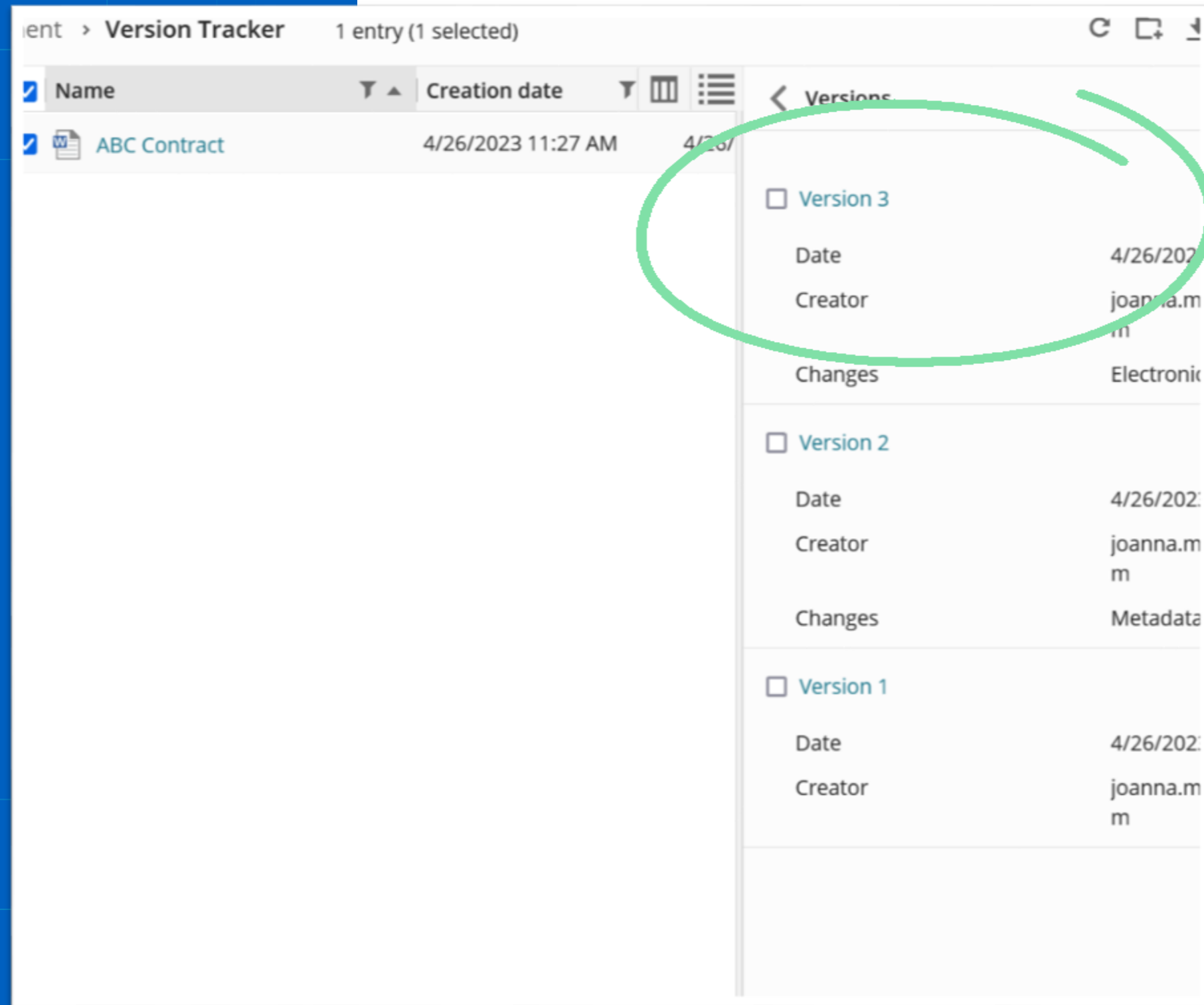
\Finance\Accounting\Accounts Payable\Purchase Orders\Digital Group

Reverse relationship

Invoice

Annotating In Document Viewer

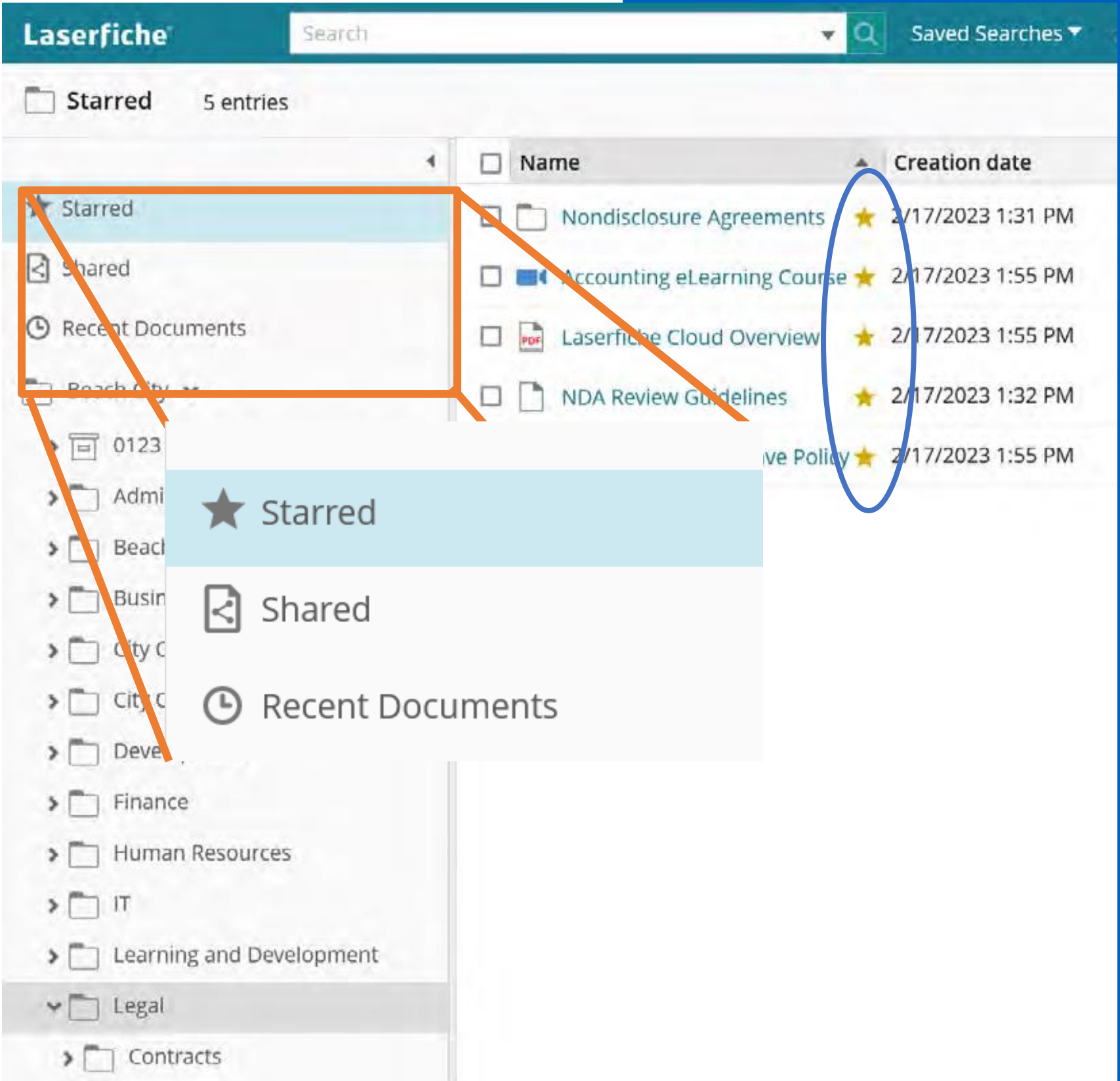




Version Control

- Can be applied on document or folder
- All changes are tracked – text, annotations, and metadata
- Saved as different versions
- Can view version history
- Revert to previous versions

Favorites/Quick Access



Email

Email Basket

Name	Send as Pages	Pages	Page Range	Clear All
NDA Review Guidelines	☒	1	1	

These documents have been selected to be sent via email. Enter page numbers and/or page ranges separated by commas. Example, 1,3,5-12.

Share via

☒ Email ☐ Direct share

Send as Files PDF

Email ☒ Use email client to manually send the message

Email options

Send

Close

Direct Share

Email Basket

Name	Send as Pages	Pages	Page Range	Clear All
NDA Review Guidelines	☒	1	1	

These documents have been selected to be sent via direct share. Enter page numbers and/or page ranges separated by commas. Example, 1,3,5-12.

Share via

☐ Email ☒ Direct share

From joanna.manager@beachcity.com
If this email address is not correct, contact your administrator.

To

Subject Files shared by: joanna.manager@beachcity.com

Message

Share expiration 7 days

Email options

Send

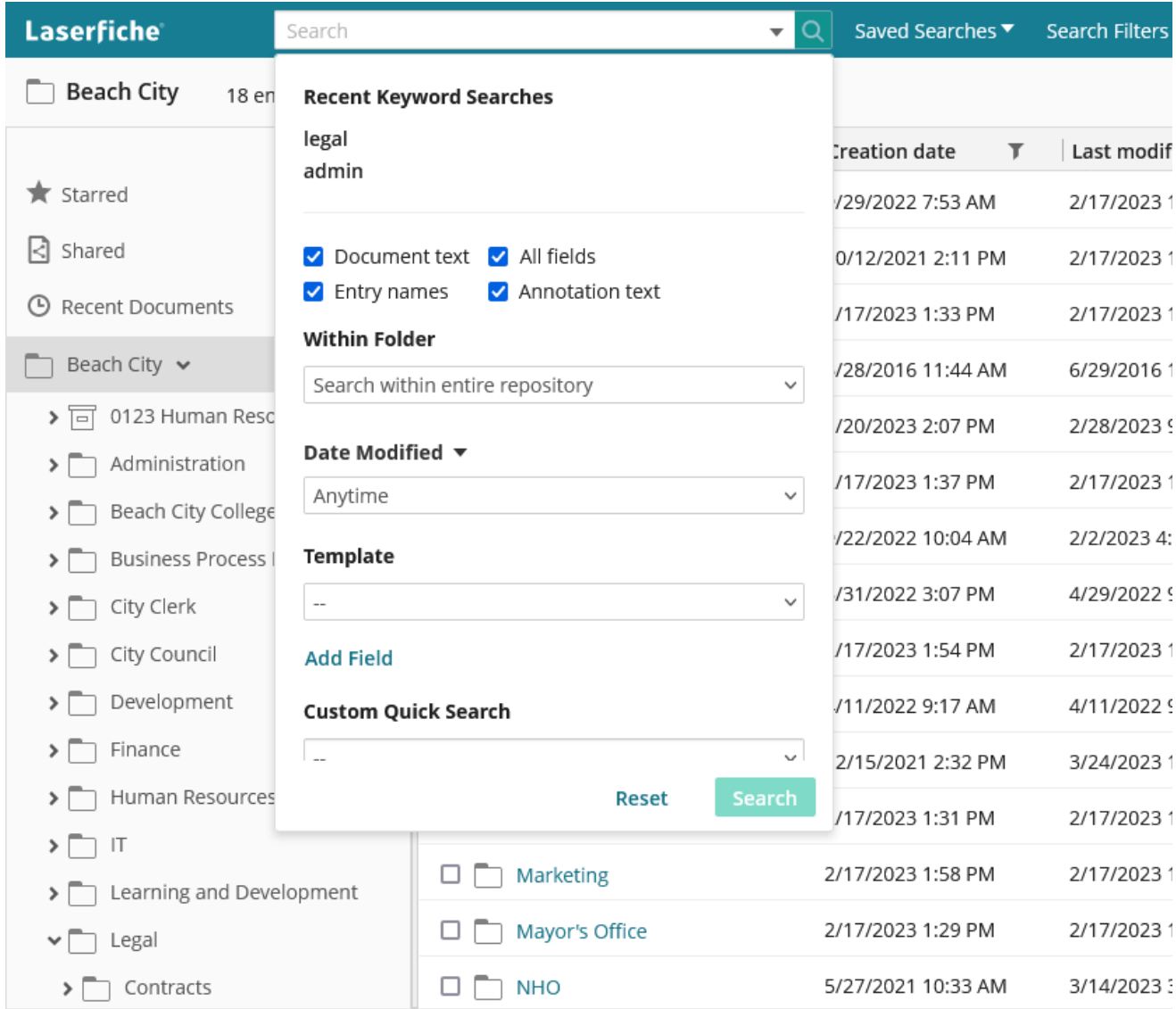
Close

Sharing Documents

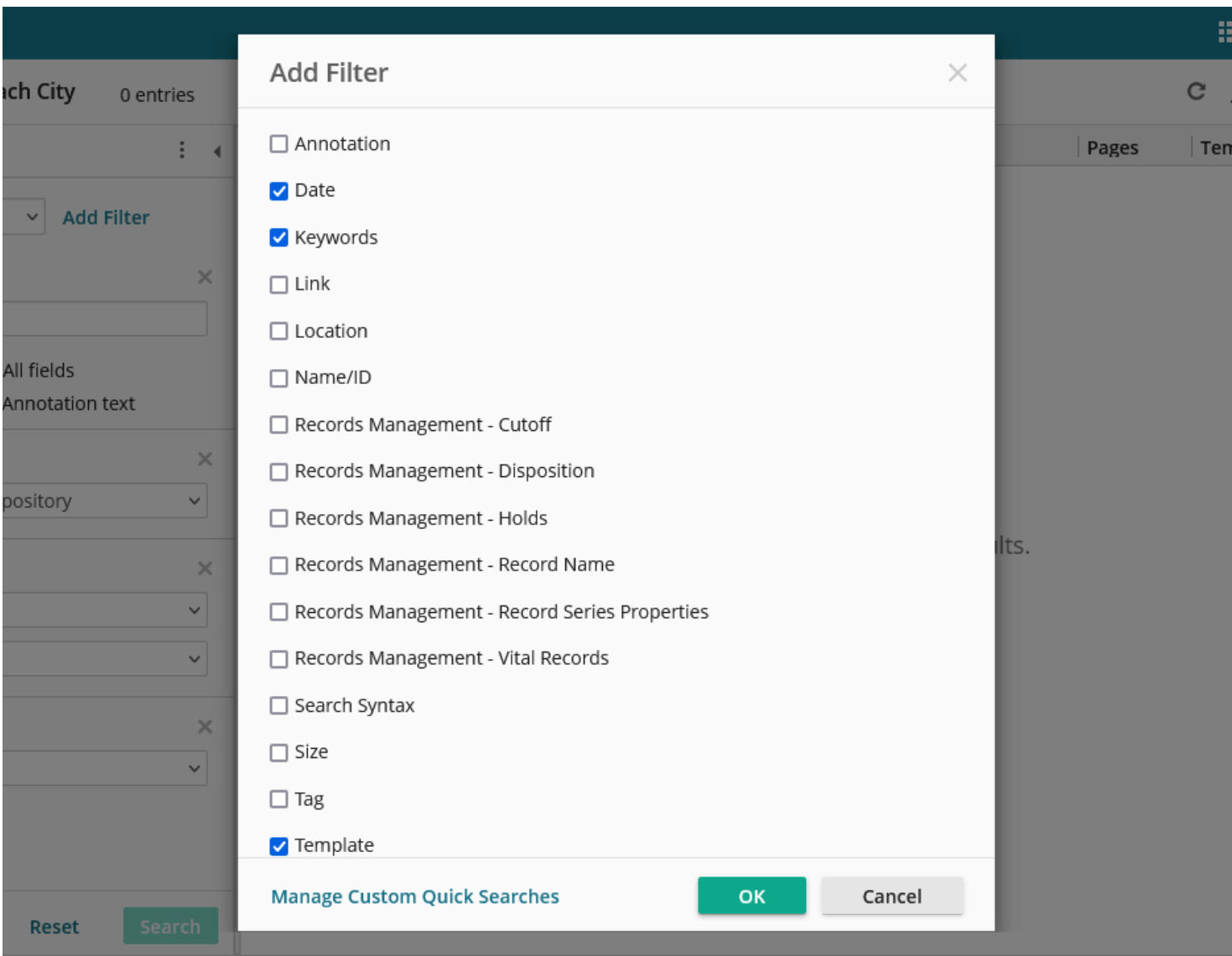
Other Tips and Tools



Quick Search



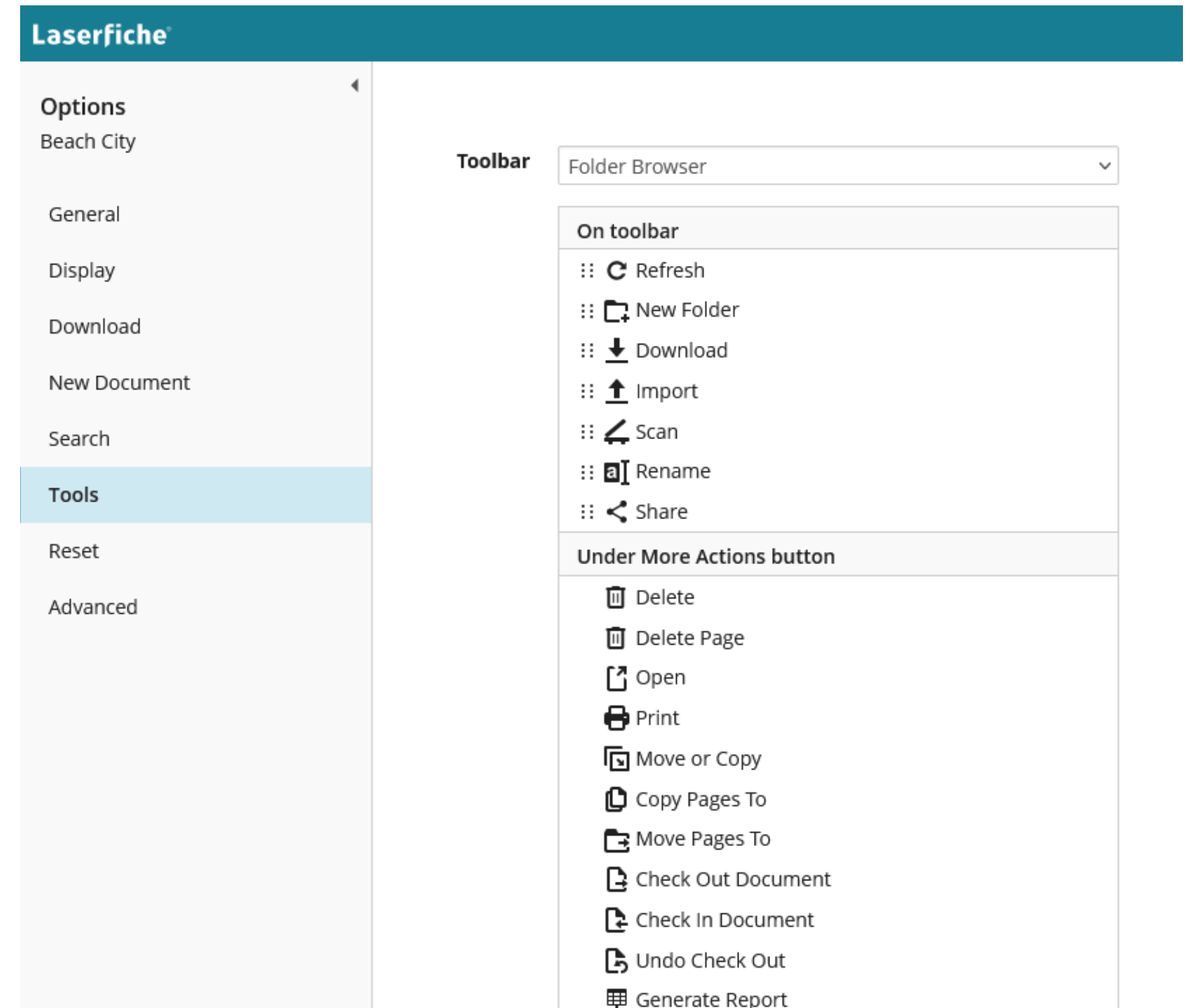
Advanced Search



Searching

Customize Repository Toolbar (Web Client)

1. Go to Options by clicking your Username.
2. Panel on left, under Options select Tools. Select option items and save.



Customize Columns

The top screenshot shows the DocuNav interface with a red circle highlighting the 'Column Picker' and 'Sort Columns' options in the top right corner. A red arrow points from this area to the 'Configure Column Display' dialog box below.

The 'Configure Column Display' dialog box has two main sections: 'Available' and 'Selected'. The 'Available' section contains a search bar and a list of 'Common Columns' including: Checked out by, Created by, Electronic file last modified, Entry ID, Extension, Has tags, Indexed, Last modified by, Latest version, Location description, Text pages, and Total document size. The 'Selected' section contains a list of columns: Name, Creation date, Last modified, Pages, and Template. At the bottom of the dialog are buttons for 'Save Profile', 'Apply', and 'Cancel'.

The bottom screenshot shows a table of documents. A blue circle highlights the 'Name' column header and a 'Reset' button. The table has columns for Name, Creation date, Last modified, and a 'Details' column. The 'Name' column is currently selected, and the 'Reset' button is visible next to it.

☐ Name	Creation date	Last modified	Pag...	Template	Details
☐ 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 Agree...	
☐ 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 Agree...	
☐ Nondisclosure Agreement - ...	2/17/2023 1:32 PM	6/1/2021 2:23 PM	2	Nondisclosure Agree...	

TidBits

- Every document in the system is given a **unique entry ID**.
- **OCR** – Optical Character Recognition – extract text from image containing text
- **Thumbnail** – tiny image of document
- Whether using Web Client or Windows, most functionalities are the same
- If you can't see it or do it, most likely you don't have access for it.

Questions?

THANK YOU!

Laserfiche 101