



Import Agent and Quick Fields



MEET OUR PRESENTER



Import Agent





What is Import Agent?

A tool used to automate the import and basic processing of documents into Laserfiche from a local drive or network location. Key features include:

- Fast import into Laserfiche from a local or network drive
- Generate Laserfiche pages from electronic files
- Generate OCR searchable text
- Assign template and/or metadata



How can Import Agent Help You?

- Import automated exports from other systems
 - Nightly exports of Purchase Orders from accounting software
 - Scheduled exports of Student Transcripts/Report Cards
 - New Hire documents from 3rd party hiring software
- Shared copy machines that scan to a network location
 - Campus/department MFC's to bring in records
- Conversion from other document management systems
 - E.g. Oracle, PaperVision, SharePoint, ...
- Large back-scanning projects
 - Import images utilizing .lst, .xml, .csv, or database to query corresponding metadata



Key Items Prior to Building a Session

Prior to building an Import Agent session, it is important to plan out the entire process. Some key components to determine are:

1. Where are the documents being imported from?
 - e.g. Network location, local drive, SFTP, ...
2. What type(s) of documents are being imported?
 - e.g. PDF, TIF, XLSX, ...
3. How often are these documents being imported?
 - e.g. Nightly, continuously, one time, ...
4. Where should these documents ultimately end up?
 - e.g. Employee/Student folder, Accounts Payable filed by Fiscal Year, ...
5. What metadata/process is needed for these documents to end up there?
 - Do they need it extracted from the file name, pulled from a 3rd party lookup, and/or routed through an existing Workflow?

Monitoring Folders

Setting up monitor options (*General* Tab):

- Select a local folder or network UNC path to monitor
 - Choose to monitor subfolders or not
- Select to import All Files or only those with specific names/file types
 - If limiting, click the *Add* button and be sure to include * as the wildcard

The screenshot shows the 'Edit Profile (DEMO)' dialog box with the 'General' tab selected. The 'Profile name' is 'DEMO'. The 'Monitored folder' is 'C:\DEMO', and the 'Retrieve files from subfolders' checkbox is checked. The 'Filter' section has 'Import' selected, with the option 'Only files whose names match one of these filters' chosen. A list box contains '*.tif', and there are 'Add', 'Edit', and 'Remove' buttons. At the bottom, there is an unchecked checkbox for 'Configure Laserfiche file settings for this profile' and 'OK', 'Cancel', and 'Help' buttons.

General

Properties

Fields

Tags

Schedule

Processing

Post-processing

Document handling

Profile name
DEMO

Monitored folder
C:\DEMO

☒ Retrieve files from subfolders

Filter

Import

☐ All files

☒ Only files whose names match one of these filters

*.tif

Add

Edit

Remove

Laserfiche files

☐ Configure Laserfiche file settings for this profile

OK Cancel Help

Laserfiche Repository Information

Setting up Laserfiche Repository (*Properties* tab):

- Create your connection to the repository
- Choose the name you want for the file in Laserfiche
- Select the location & volume you want the file imported into
- Utilize the > button to access tokens
 - e.g. File type/name/path in original location

The screenshot shows the 'Edit Profile (DEMO)' dialog box with the 'Properties' tab selected. The 'Document properties' section is highlighted with a red box. The 'Name' field contains '%(FileName)' and the 'Folder' field contains '\\DEMO\\%(Subfolder)'. The 'Volume' dropdown is set to '01SCAN'. The 'Count' section shows 'Set Profile Count token to' with a value of '1'.

Sign-in account	
Server	localhost
Repository	Employee-Records
TLS	No
Name	ADMIN

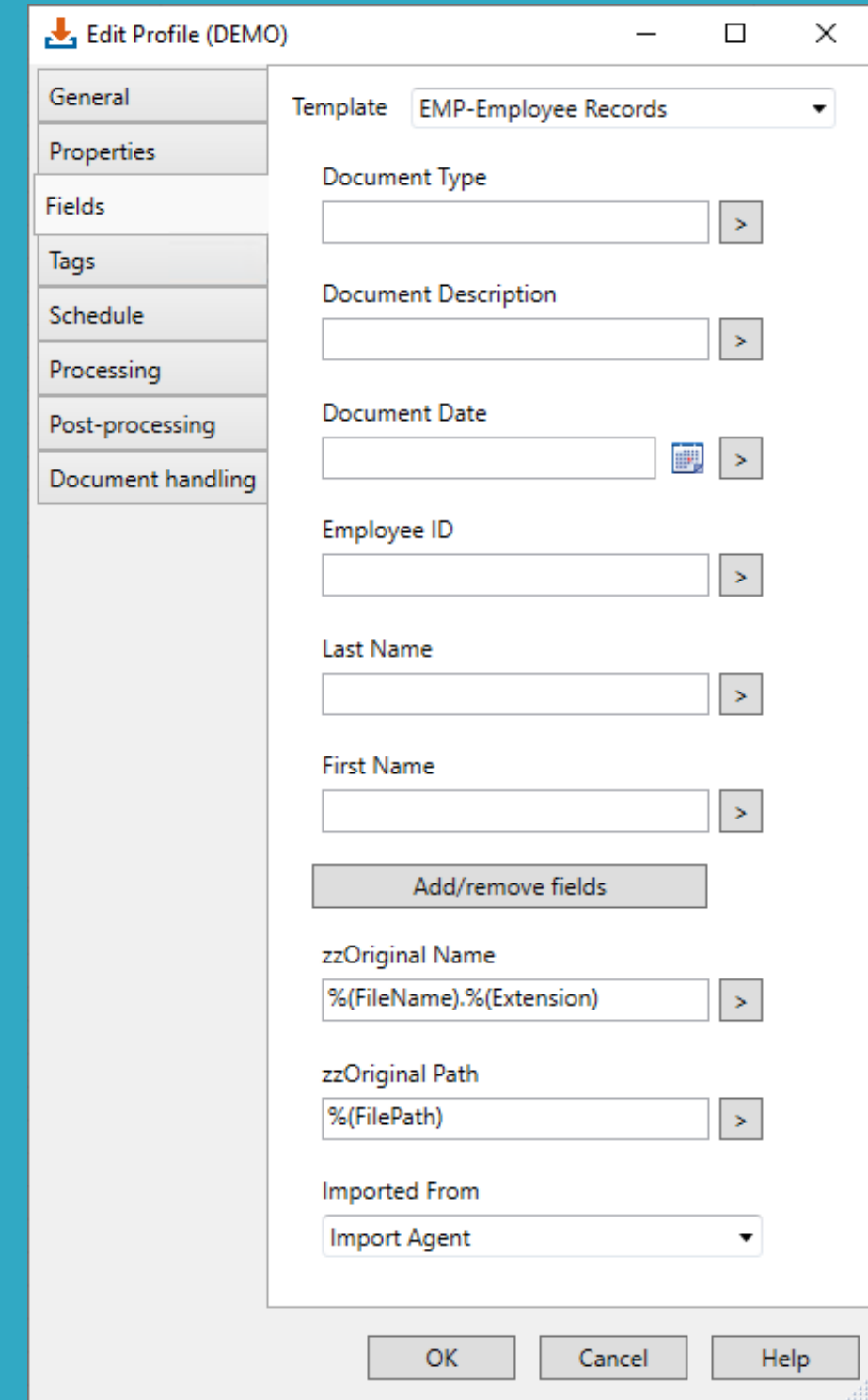
Document properties	
Name	%(FileName)
Folder	\\DEMO\\%(Subfolder)
☐ Use the following folder if the above folder cannot be found	
Volume	01SCAN

Count
Set Profile Count token to 1

Laserfiche Metadata

Setup Laserfiche metadata (*Fields* tab):

- Choose template to assign to documents
- Fill in the metadata fields to assign
 - You can use hard coded values or Import Agent provided tokens like file name or path
- It is important to put the original name and file path of a document into a field when importing so it can always be tracked back to its origin
- For additional metadata needs (e.g. Parsing metadata from file name/path) consider an integration with Workflow



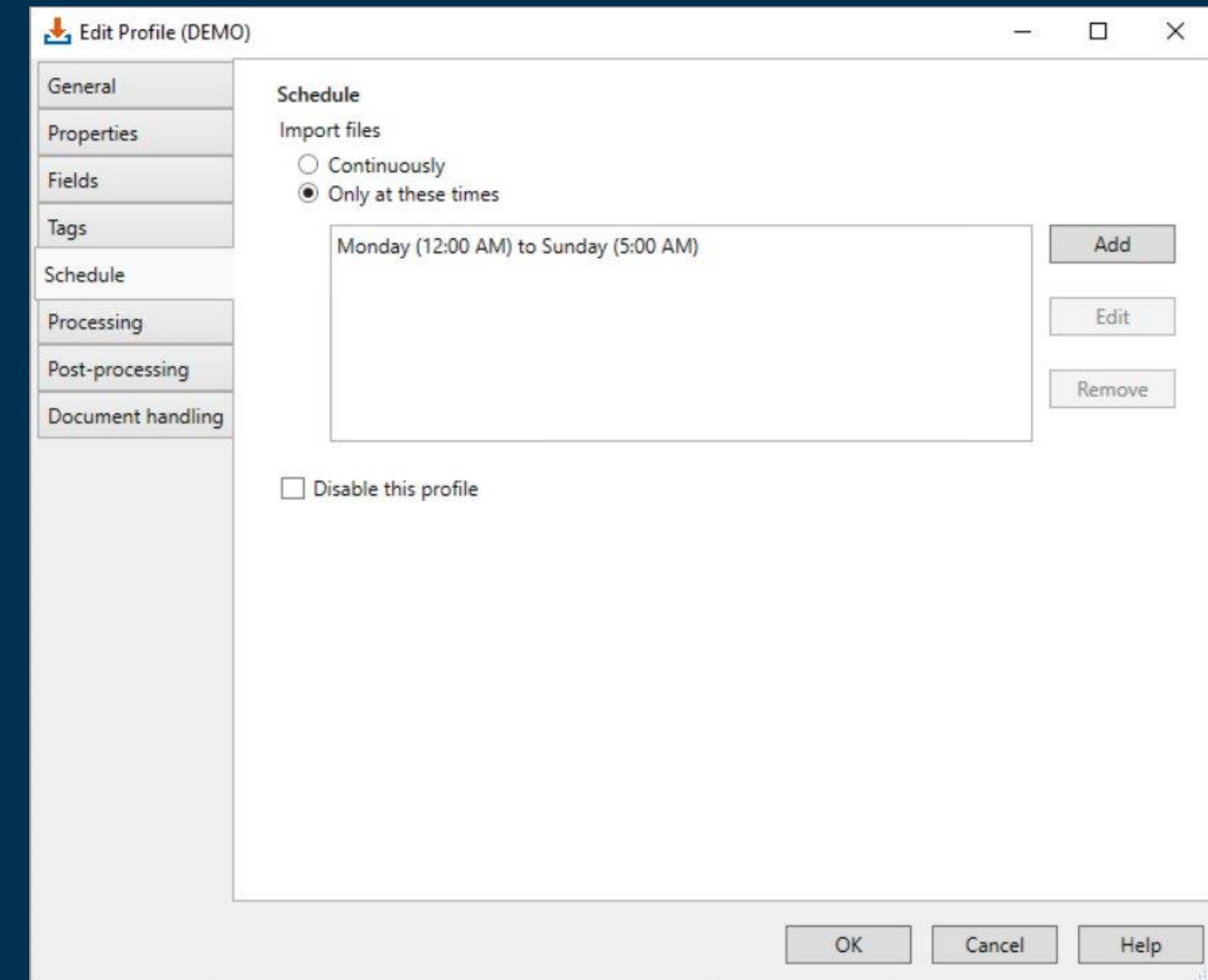
The screenshot shows the 'Edit Profile (DEMO)' dialog box with the 'Fields' tab selected. The 'Template' dropdown is set to 'EMP-Employee Records'. The 'Fields' list on the left includes General, Properties, Fields, Tags, Schedule, Processing, Post-processing, and Document handling. The main area contains the following fields:

- Document Type: [Text field] >
- Document Description: [Text field] >
- Document Date: [Text field] [Calendar icon] >
- Employee ID: [Text field] >
- Last Name: [Text field] >
- First Name: [Text field] >
- Add/remove fields: [Button]
- zzOriginal Name: [%{FileName}.%{Extension}] >
- zzOriginal Path: [%{FilePath}] >
- Imported From: [Import Agent] >

At the bottom are OK, Cancel, and Help buttons.

Scheduling Import

- Select a folder to monitor with the agent
- Choose to monitor subfolders or not
- If necessary, choose the type of documents to import
- Choose to either monitor the folder constantly or on a schedule



Options for Processing

Setting up Process Options (*Process* tab):

- Choose whether you want to retrieve existing text associated with the document or if you want to generate OCR text
- For PDF's, select:
 - Whether to generate Laserfiche pages
 - Generate as Color, Grayscale, or Black & White
 - If keeping original PDF
 - DPI if wanting to downsize PDF

The screenshot shows the 'Edit Profile (DEMO)' dialog box with the 'Process' tab selected. The 'Generate text' section is highlighted with a red box, showing options to 'Retrieve text' and 'Use OCR if no text is available'. The 'Text file processing' section shows a checkbox for 'Create a new text page every 60 lines'. The 'PDF file processing' section is also highlighted with a red box, showing options to 'Generate Laserfiche pages in Standard color', 'Keep original PDF files', 'Preserve PDF annotations on Laserfiche pages', 'Ignore PDF native text', and 'Create pages at DPI 300'. The 'OK', 'Cancel', and 'Help' buttons are at the bottom right.

Edit Profile (DEMO)

General
Properties
Fields
Tags
Schedule
Processing
Post-processing
Document handling

Generate text

- ☒ Retrieve text
- ☒ Use OCR if no text is available
- ☐ Configure profile-specific OCR settings.

Text file processing

- ☐ Create a new text page every 60 lines

PDF file processing

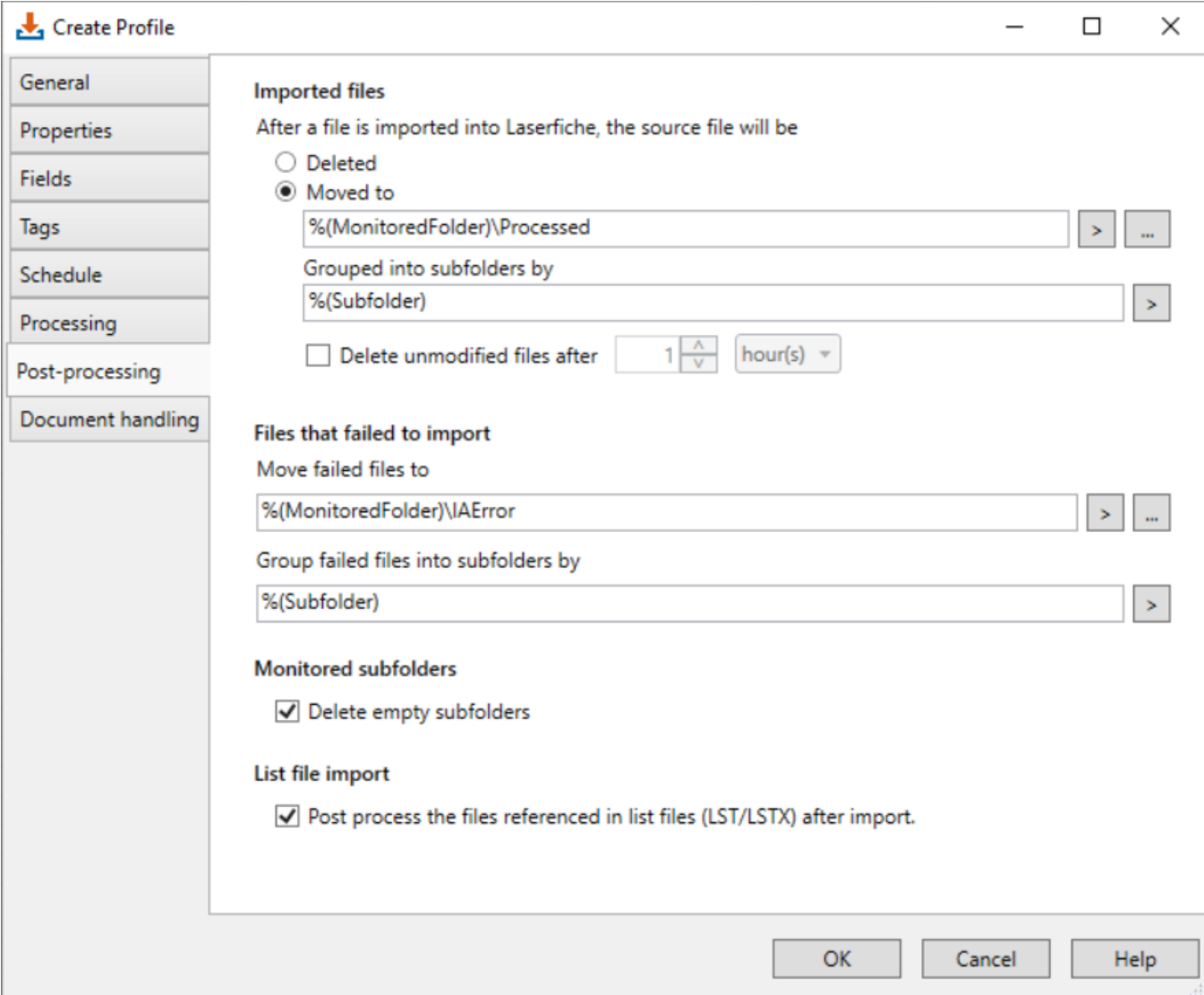
- ☒ Generate Laserfiche pages in Standard color
- ☒ Keep original PDF files
- ☒ Preserve PDF annotations on Laserfiche pages
- ☐ Ignore PDF native text
- ☐ Create pages at DPI 300

OK Cancel Help

Post Processing for Documents

Decide how to handle documents once processing is completed (*Post Processing* tab):

- For successfully imported documents, choose to:
 - Delete original documents immediately after import
 - Move original documents to a location & delete after X amount of time
- For unsuccessfully imported documents, choose where to move the original documents to
- Determine whether to delete the now empty sub-folders from the original document's locations



The screenshot shows the 'Create Profile' dialog box with the 'Post-processing' tab selected. The 'Imported files' section has 'Moved to' selected, with the path '%(MonitoredFolder)\Processed' and a 'Grouped into subfolders by' field set to '%(Subfolder)'. There is a checkbox for 'Delete unmodified files after' set to 1 hour(s). The 'Files that failed to import' section has 'Move failed files to' set to '%(MonitoredFolder)\IAError' and 'Group failed files into subfolders by' set to '%(Subfolder)'. The 'Monitored subfolders' section has 'Delete empty subfolders' checked. The 'List file import' section has 'Post process the files referenced in list files (LST/LSTX) after import.' checked. The dialog has 'OK', 'Cancel', and 'Help' buttons at the bottom.

Integration with Workflow

If all processing cannot be done via Import Agent, then integrate Workflow into your process. Some examples are:

- Parsing metadata from file's original name/path
 - e.g. Looking up employee ID/name
- Mapping document types provided to their corresponding Laserfiche document types

Name
 11111_Smith_Jack_01-21-2025_Payroll_W-2.pdf



What is rumored for Import Agent 12

While we don't yet know the specifics, the following has been requested and/or rumored to be in the coming fall or spring release:

- Web services integration
 - Ability to connect to Laserfiche via Web Services for hosted customers
- Improved notification and logging
- Updated User Interface
 - Improved administrative experience
 - Additional tokens and token editor

Quick Fields



What is Quick Fields?

A tool used to automate the import of documents into Laserfiche from a local drive or network location, along extract metadata. Key features include:

- Import into Laserfiche from a local or network drive
- Generate Laserfiche pages from electronic files
- Generate OCR searchable text
- Assign template and/or metadata
- Extract metadata via OCR and/or barcodes
- Classify & process various documents via a single session
- Provide logic for routing, metadata assignment, classification, and error handling

How can Quick Fields Help You?

- Import & Process large batches of consistently designed computer-generated documents from other systems & extract their corresponding metadata (OCR, barcode, name parsing, ...)
 - Nightly exports of Purchase Orders from accounting software
 - Scheduled exports of Student Transcripts/Report Cards
 - New Hire documents from 3rd party hiring software
- Process batches of scanned documents using Slip Sheets
- Break apart large batches into their individual documents
 - e.g. Backscanning employee folders
- OCR Batches of documents from network or already in Laserfiche

Difference Between Import Agent, Quick Fields, DCC, & Workflow

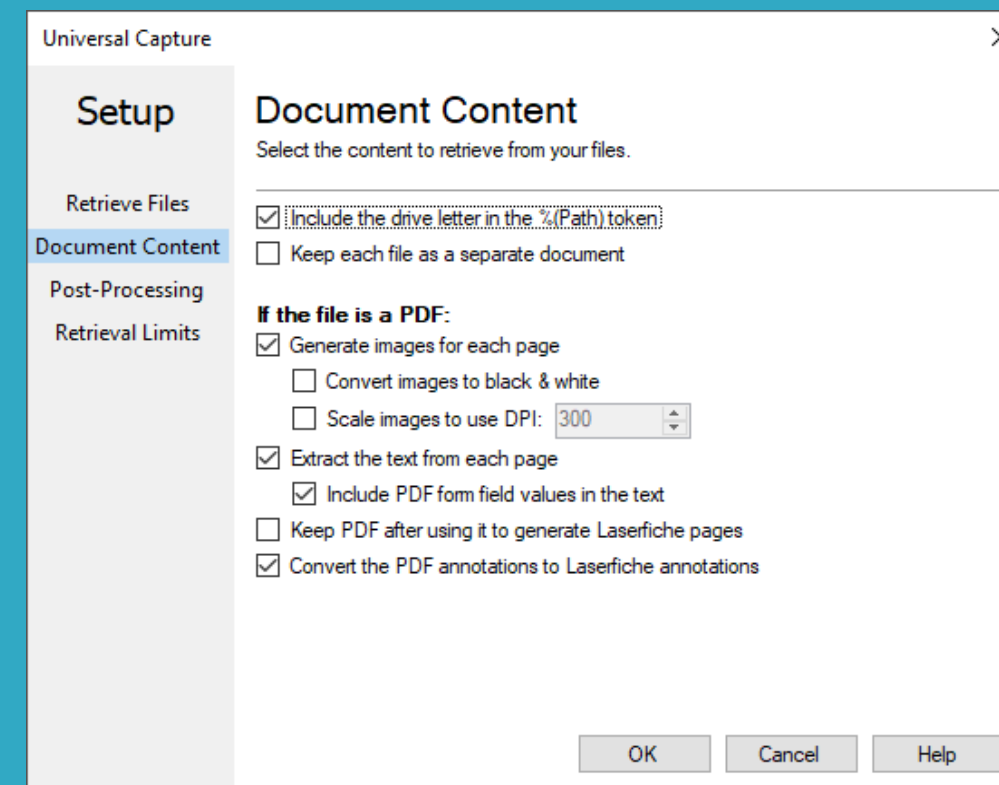
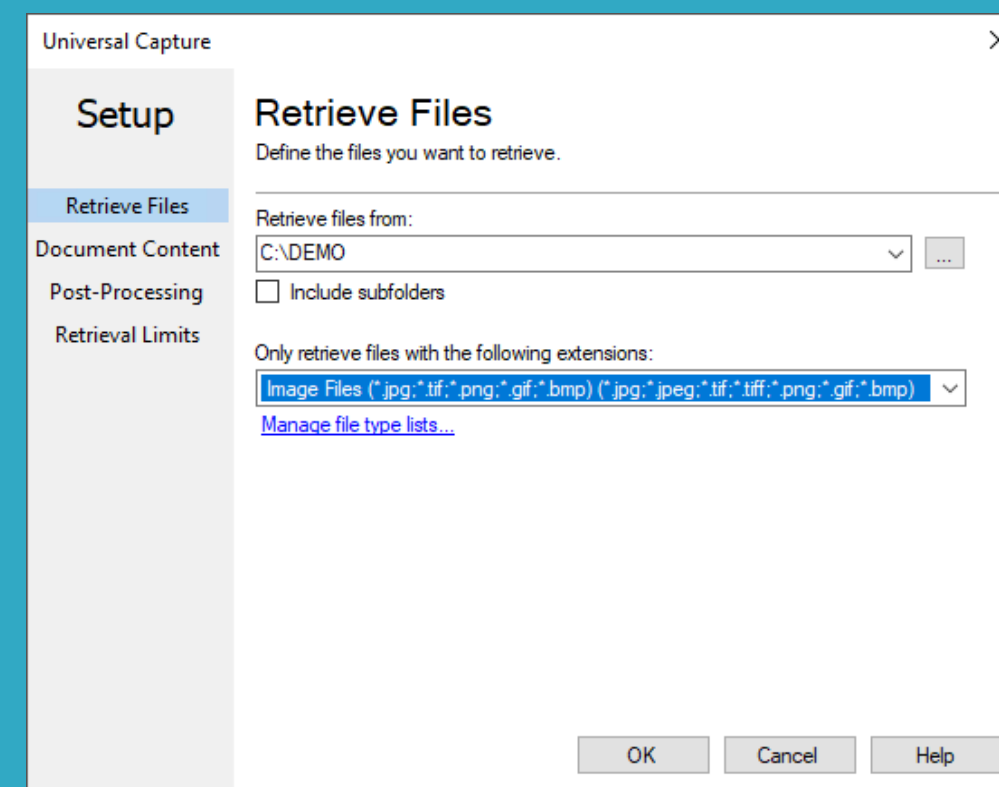
While some functionality is shared across these applications, they each excel in their unique areas. As such, it is key to determine which to use or if a combination will work best for your process. Below are the key strengths to consider:

- Import Agent
 - Fastest automated import but limited customization/logic
- QuickFields
 - Barcode & Zone OCR extraction, slower import, but less limited customization/logic
- DCC
 - Server based OCR & PDF page creation but limited to only those functions
- Workflow
 - Fully customizable and most logic but slowest at import and cannot OCR or generate pages

Scanning from a Network Location

When scanning from a drive/network location

- *Retrieve Files* tab
 - Select the location to scan from
 - Choose the file types to scan
- *Document Content* tab
 - Choose how you want to handle the document
 - Select how to handle PDF's
- *Post Processing* tab
 - Choose to keep, move, or delete originals
- *Retrieval Limits* tab
 - Set any time or quantity limits on retrieving the documents



Scanning from a Laserfiche Location

When scanning from a Laserfiche location

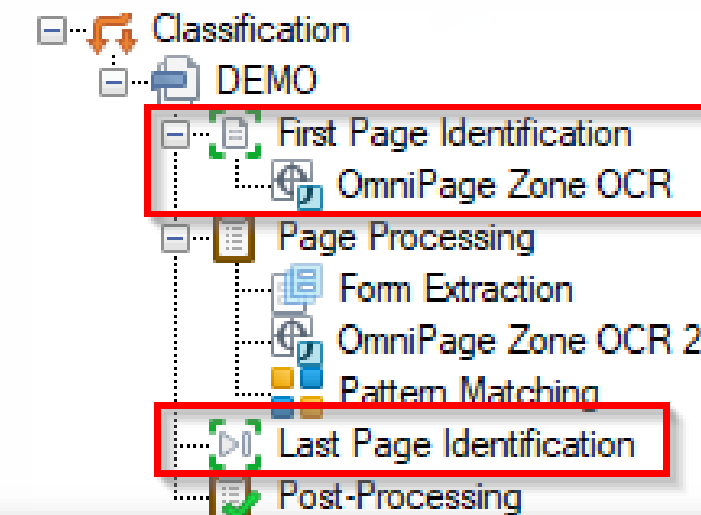
- **Retrieve Files** tab
 - Select the path to scan from along with existing document info to include (e.g. template, metadata, ...)
 - Use *Search for entries* for more advanced searches
- **Document Content** tab
 - Choose how you want to handle the document
 - Select how to handle PDF's
- **Post Processing** tab
 - Choose to keep, move, or delete originals
- **Retrieval Limits** tab
 - Set any time or quantity limits on retrieving the documents

The screenshot shows the 'Retrieve Entries' dialog box in the Laserfiche Capture Engine. The 'Setup' tab is selected on the left. The 'Retrieve Entries' section on the right has two radio buttons: 'Basic retrieval' (selected) and 'Search for entries'. Under 'Basic retrieval', there are several checkboxes: 'Path' (checked), 'Name' (unchecked), 'Type' (checked), 'Fields' (unchecked), 'Template' (unchecked), and 'Tags' (unchecked). The 'Path' dropdown menu is set to 'employee-records\DEMO'. There are 'OK', 'Cancel', and 'Help' buttons at the bottom right.

The screenshot shows the 'Document Content' dialog box in the Laserfiche Capture Engine. The 'Setup' tab is selected on the left. The 'Document Content' section on the right has two sections: 'For each document:' and 'For each page in the document, retrieve:'. Under 'For each document:', there are checkboxes for 'Keep each entry as a separate document' (checked), 'Retrieve electronic file' (checked), 'Retrieve fields' (checked), and 'Retrieve tags' (unchecked). Under 'For each page in the document, retrieve:', there are checkboxes for 'Image' (checked), 'Text' (unchecked), and 'Annotations' (unchecked). There is also a section for 'If the document is a PDF:' with checkboxes for 'Generate images for each page' (checked), 'Convert images to black & white' (unchecked), 'Scale images to use DPI: 300' (selected), 'Extract the text from each page' (checked), 'Include PDF form field values in the text' (checked), 'Keep PDF after using it to generate Laserfiche pages' (checked), 'Convert the PDF annotations to Laserfiche annotations' (checked), and 'If the entry already has Laserfiche pages, overwrite them' (unchecked). There are 'OK', 'Cancel', and 'Help' buttons at the bottom right.

Creating Document Classes

- Each class is for a different type of document being processed by the session
- The class is identified by an identifying condition on the first page of the document (E.g. document header, Slip Sheet, barcode)
- The condition is commonly identified by zone OCR, pattern matching or reading a barcode
- The session will append pages to the document until one of the following actions occur
 - The first page identification conditions are met again
 - If set, the last page identification conditions are met
 - A predetermined number of pages have been processed



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

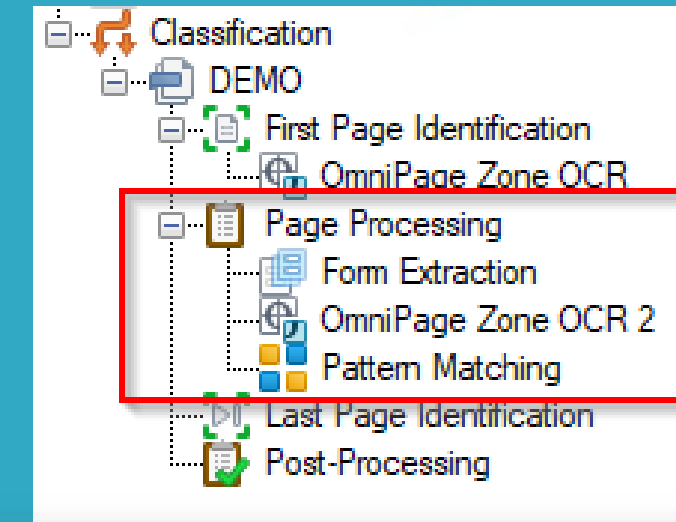
PAY THE SUM OF EIGHT HUNDRED EIGHTY EIGHT DOLLARS & TWENTY FIVE CENTS

TO THE
ORDER OF

Teller Automotive & Co.
545 Best Repair St.
Fixitight, TX 32145

Extract Information on the Document

- Use zone OCR, pattern matching, and barcode reading to extract necessary metadata for Laserfiche
- To set the zones upload a sample page of the document and use it as a guide to set the zones for scanning
- Use page enhancements to make the document more consistent to process (E.g. form extraction, form alignment)



CHECK# 123456		CHECK DATE 09/26/2021		VENDOR# 6055	
Account	Purchase Order	Invoice Number	Description	Amount	
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DocuNav
Independent School District

DocuNav Independent School District
Frisco, TX 75034

Check Date	Check Number
09/26/2021	123456

Amount

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

TO THE
ORDER OF Teller Automotive & Co.
545 Best Repair St.
Fixitight, TX 32145

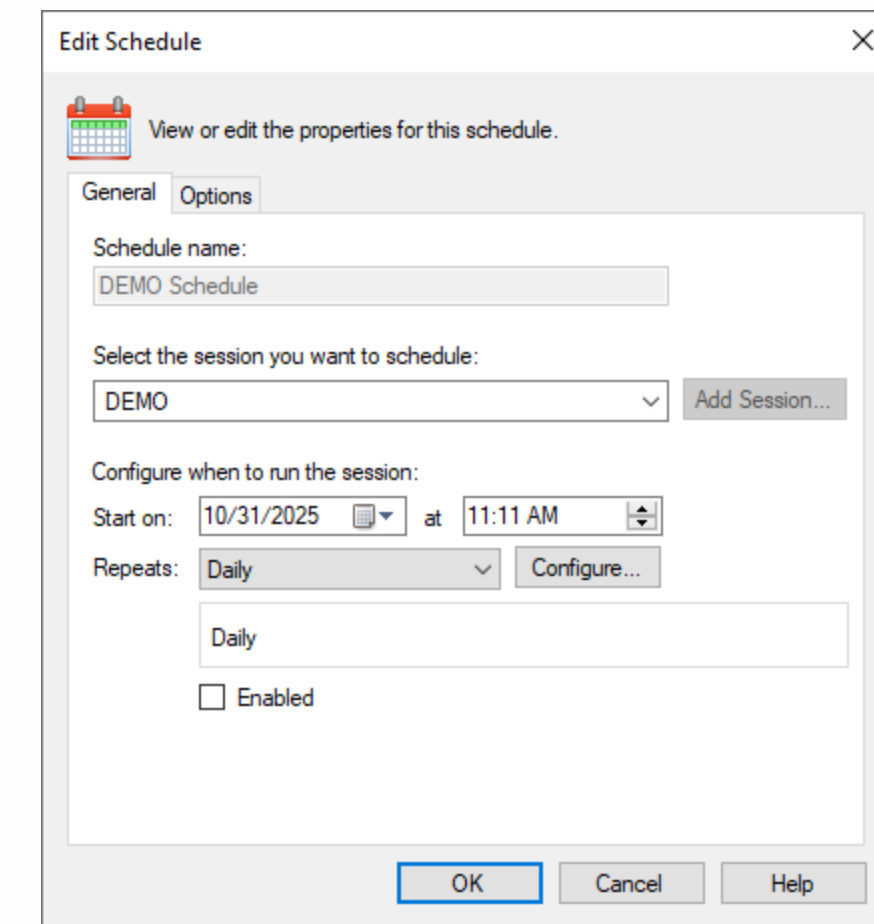
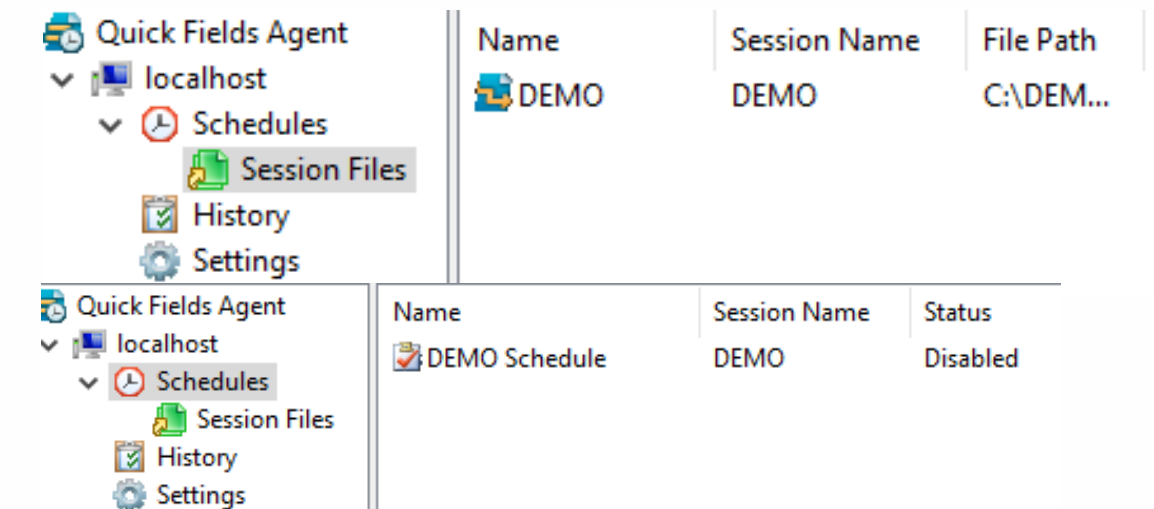
Assign Metadata and Folder Locations

- Use the information extracted from the document to assign metadata to the document when it gets sent to the repository
- You can also use tokens for the path and name of the document to route and name based on variables
- Once in the repository the folder can be monitored by a filing workflow that can file the documents without any manual input

The screenshot shows a configuration window for DocuNav. At the top, there are two input fields: 'Default document name:' with the value '%(Name)' and 'Store documents in:' with the value '\\DEMO'. Below these are two tabs: 'Fields' (selected) and 'Options'. Under the 'Fields' tab, the 'Template: FIN-Vendor Records' is selected. The configuration includes several fields with tokens: 'Check Number' with token '%(tkCheckNumber)', 'Check Total' with token '%(tkCheckAmount)', 'Document Date' with token '%(tkCheckDate)', 'Document Description' with the value 'Vendor Check', 'Document Type' with the value 'Checks', 'Vendor Number' with token '%(tkVendorNumber)', and 'Imported From' with the value 'Quick Fields'. Each field has a right-pointing arrow button next to it.

Schedule Sessions with Quick Fields Agent

- Quick Fields Agent is a separate application that can automatically run sessions
- Select the session by referencing the .qfx file of the session
- Create a schedule to run the session on a schedule



QUESTIONS?







