Overview of New Features in Laserfiche 8.2

White Paper

February 2011

Laserfiche®

Table of Contents

Laserfiche 8.2 is a minor release of the Laserfiche core Client and Server, including significant enhancements, fixes and new features in the Laserfiche Server, Client, Administration Console, PhotoDocs, Snapshot, Records Management and Audit Trail. This paper provides an overview of the new features available in this release.

Laserfiche 8.2 Client and Server Enhancements

Dynamic Fields

Often, one field may refer to a value in another field—for instance, when filling in an address on a template, you might need to allow users to select a country, state or province, and city. With dynamic fields, you can set up your fields to reflect this. In this example, you could configure your fields so that a user would select a country first, and then would only be able to select states or provinces within that country; once a state or province was selected, they would only be able to select cities in that state or province.

Dynamic fields improve your use of fields in two ways. First, users don't need to scroll through a long list of irrelevant results: only the results that are relevant to them will be displayed. In addition, users cannot accidentally input invalid values, as they are constrained by the possible values configured by the administrator.

Native PDF Import Handling

We now support native conversion of PDF files into Laserfiche imaged documents, either during the import process or for PDFs already in the repository. If this option is enabled, a PDF imported into Laserfiche will be converted to TIFF image pages so that it can be viewed and worked with using the Laserfiche Document Viewer. Any compatible PDF annotations will also be converted to Laserfiche annotations, and Laserfiche can extract any existing text from the PDF and store it as text pages as well. If the PDF has no text stream, you can OCR the generated TIFF images and create searchable text that way. You can choose either to retain the electronic file along with the image and text pages, or to discard the original electronic file and work only with the image and text pages. This allows you more flexibility when working with PDFs, and the ability to take advantage of all of Laserfiche's document handling features even for PDF documents.

Text Stamps and Dynamic Stamps

In previous versions of Laserfiche, the only way to create a stamp was to create a bitmap of the image you wanted to use for the stamp and upload it to Laserfiche. In Laserfiche 8.2, we have added the ability to create a text stamp directly within Laserfiche without needing to create an image. Additionally,

4

text stamps support tokens. For instance, you could create a stamp that displays the user who applied the stamp and the date a document was stamped. This allows you to apply information dynamically to documents using stamps.

Search Improvements

Laserfiche 8.2 includes several new search features and enhancements. These features include new options for existing searches, new search types, and the ability to refine a set of search results.

Search Within Search Results

Laserfiche 8.2 supports the ability to refine a search by performing another search within the current set of results. This allows you to quickly narrow down a large set of search results, as the refined search does not need to be performed across the entire repository.

Search Stemming

Search stemming is an optional setting that allows a user to return search results that share the same root word as the search term. For instance, with search stemming enabled, a search for "swim" would return results including the words "swam" and "swimming" in addition to results including the word "swim." Like fuzzy search or wildcard search, this allows users to quickly find relevant documents even if they don't have the exact words.

Relevance Ranking

Full-text search results can now be ranked by relevance, allowing you to sort more relevant search results to the top of the search results list. Relevance ranking makes it faster and easier to find the documents you want, particularly for full-text searches that return a lot of results.

New Search Types

Laserfiche 8.2 allows you to search for documents based on the number of pages in the document, or the size of the electronic file associated with the document. You can also choose to search within multiple folders when using the Within Folder search.

Office Integration Updates

Laserfiche's integration with Microsoft Office has been significantly streamlined and more tightly integrated with Office. In addition to improved interactivity between Microsoft Office and your repository, the integration also includes new features such as the ability to view document metadata from within an Office application, and the ability to attach documents directly to e-mail in Microsoft Outlook.

Optional Watermarks

Users can now configure optional watermarks that will be printed on documents when they are exported or printed. Unlike the watermarks available with Laserfiche Audit Trail, these watermarks are configured by the user and are not used for security. Instead, these watermarks allow users to add information to documents when they are exported or printed, such as "Draft" or "Do Not Copy."

Tag Watermarks

With Advanced Audit Trail 8.2, administrators can configure watermarks as part of the tag metadata type. This allows you to create watermarks that are specific to a particular document or set of documents, rather than specific to a particular group in Laserfiche. For instance, you could configure a Confidential tag to print a watermark reading "Confidential – Do Not Copy" on all documents to which the tag was applied.

Custom Field Formats

Administrators can now specify how number and date fields are displayed to users. When creating or modifying a number or date field, you can select from several pre-defined formats (such as currency or percentage), or you can create a custom format to display the number or date exactly as you want it.

Volume Enhancements

Laserfiche 8.2 includes two major enhancements to volumes: volume rollover based on a time schedule, and the ability to encrypt or compress writeable volumes.

Time-based Volume Rollover

When a volume has been created as a logical volume, it will periodically "roll over" and create a new subvolume. In previous versions of Laserfiche, this rollover was determined by volume size. In Laserfiche 8.2, you can choose to trigger volume rollover based on volume size or on a time schedule. For example, you could choose to have your volumes roll over on a quarterly basis.

Writeable Encrypted and Compressed Volumes

In Laserfiche 8.1, we introduced the ability to compress a volume's files to reduce the space they took up, and the ability to use strong encryption to protect a volume's files on the hard drive. However, for Laserfiche 8.1, these features were only available for read-only volumes In Laserfiche 8.2, volumes can be encrypted or compressed while still in a writeable state.

WebHelp

The User and Admin Guides, including help for all features of Laserfiche 8.2, are now available online in their most up-to-date form. This allows you to quickly find the most current information about your installation.

Current Activity Node

Laserfiche 8.2 includes several new tools that allow administrators to manage activity in the repository. Administrators can now see a list of all documents that have been locked for editing, as well as when and by whom they were locked. They can also now see what actions—particularly operations that may cause high server load, such as briefcase import or volume migration—are currently ongoing in the repository, which can help them locate performance bottlenecks. These new Administration Console nodes, along with the existing Sessions and Checked Out Documents nodes, have been collected into a new Activity parent node to allow administrators to quickly find and view important information about their repository.

Troubleshooting Enhancements

Both administrators and users now have access to additional troubleshooting enhancements and resources in case problems occur. Client error messages now contain additional information about the issue being reported. The briefcase and volume import and export dialogs now link users directly to the relevant log file if errors or warnings occur. In addition, users can enable tracing for troubleshooting purposes directly from within the Client, and can use a new tool for gathering troubleshooting information about your Laserfiche installation.

Performance Enhancement Options

Laserfiche 8.2 features several new performance enhancements designed to speed up loading of thumbnails, document pages, and lists of entries. In addition, users can take advantage new options to determine how search results are returned and how the folder browser is displayed in order to improve performance for those features.

Expanded Export Options

Laserfiche 8.2 allows you more finely-grained control of document export. You can now choose to compress JPG and PDF files when they are exported, and can choose the desired quality level for compressed files. You can also choose to export imaged documents in the archival PDF/A format.

Installation Enhancements

The Laserfiche 8.2 installation has been updated and streamlined, and now includes single-operation installation and fully integrated language pack handling.

License Manager Registration During Installation

Users who are installing the Laserfiche Server as part of a Rio installation can now register their Laserfiche Server directly to the Rio License Manager as part of the install process. It is no longer necessary to register the Server separately.

Improved Compatibility and Driver Updates

As of 8.2, the Laserfiche Office integration now fully supports the win32 edition of Office 2010. In addition, Laserfiche Snapshot's drivers are now fully compatible with Windows 7.

Annotation Enhancements

Laserfiche 8.2 includes several enhancements to annotation handling. Laserfiche annotations can now be converted to and from PDF annotations when PDFs are imported or exported from Laserfiche. Text annotations such as sticky notes and callout text now support tokens. In addition, you can now specify a direction for textbox, callout, strikethrough and underline annotations.

Laserfiche 8.2 Records Management Edition Enhancements

Cutoff Based on "Any" or "All" Events Triggered

In previous versions of Laserfiche Records Management Edition, event-based cutoff required all event dates to be set and passed before the records were eligible for cutoff. In Laserfiche 8.2, you can configure an event-based cutoff instruction to make records eligible for cutoff either when all events have been set (as before) or when any one of the events has been set.

New Cutoff Instruction Types

Laserfiche RME 8.2 introduces four new cutoff instruction types.

Interval Cutoff

Interval cutoff allows for cutoff after a certain interval of time (such as sixty days, six months, a year, or five years) has passed after the filing date. Unlike time-based cutoff, where the record is eligible for cutoff at the start of the next cycle, interval cutoff makes the record eligible as soon as the exact interval has passed.

Interval-Event Cutoff

Like Time-Event Cutoff, Interval-Event cutoff calculates cutoff eligibility based on the combination of a time period and an event date. As with Interval cutoff, Interval-Event cutoff uses an exact length of time after the filing date rather than a cycle definition.

Superseded Cutoff

Superseded Cutoff allows you to immediately perform cutoff on any record that has been superseded. If a record within a record folder or series set to this cutoff instruction is assigned the "Superseded by" document relationship, it will be automatic cutoff.

Linked Disposition Cutoff

Linked Disposition Cutoff allows you to immediately perform cutoff on any record that has a particular document relationship assigned to it *and* that has been accessioned or transferred. As with Superseded Cutoff, Linked Disposition Cutoff is automatic.

Record-Specific Retention Schedules, Cutoff, and Disposition Handling

In previous versions of Laserfiche RME, very few actions could be performed on individual records; most records management operations could only be

performed on the parent folder. To give you more flexibility in handling individual records, we have extended some records management operations and settings to individual records. You can now set a retention schedule on an individual record; this retention schedule will take precedence over the retention schedule on the parent record folder. You can also perform cutoff on individual records within an eligible record folder. In addition, you can perform transfers and final disposition on individual records, as long as they are eligible according to either their own or a parent folder or series' retention schedule.

Records Management Information in Briefcases

Briefcases now support inclusion of records management information and disposition states. Briefcases exported as part of an accession or transfer will automatically include this information; briefcases exported at other times can be configured to include or exclude RME data.

Other Components

PhotoDocs Improvements

Laserfiche Photodocs has been significantly enhanced to make it easier to use when importing and working with photos. It features several new panes to allow you to view document and processing properties, as well as a new workspace. You can also save processing profiles, allowing you to quickly apply a set of options to similar types of images.

Reprocess Mode in PhotoDocs

Laserfiche PhotoDocs now allows you to reprocess images that are already in your Laserfiche repository. This allows you to take advantage of the advanced OCR image processing features of PhotoDocs for documents you scanned before you began using PhotoDocs.

Snapshot Profiles

Laserfiche Snapshot allows you to save sets of Snapshot options and settings and quickly select them for use later. This allows you to switch between more than one collection of settings easily to allow for processing of different document types.

Snapshot Compatibility

Laserfiche Snapshot's driver set is now fully compatible with Windows 7.

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Author: Constance Anderson
Technical Editor: Justin Pava

Description:
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