

What's New in Laserfiche 8

White Paper

June 2008

Laserfiche®

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Table of Contents

New Search Engine and Search Enhancements	4
Search Within Documents	4
Expanded Electronic Document Search	4
Quick Search	4
Recycle Bin	5
HTTP Server/Client Communication	5
Trustee Management	6
Improved Windows Account Handling	6
Trustee Attributes	6
Account Security	7
Annotation Enhancements	7
New Annotation Types	7
Annotation Preferences	8
Sticky Note History	9
Field and Template Enhancements	9
Multi-Value Fields	10
New Security Features	10
Default Security	10
Entry Ownership	11
Folder Tunneling	11
Folder Filter Expressions	11
New Access Rights and Privileges	12
System Managers	12
Folder Browser Enhancements	13
Folder Copying and Folder Structure Copying	13

Shortcuts to Documents or Folders.....	13
Default Volumes on Folders.....	13
Recent Documents	14
Navigation Bar	14
Fully Customizable Toolbar and Shortcut Keys.....	14
Audit Trail Reporting.....	14

Laserfiche 8 includes many new features, ranging from architectural upgrades to new Client usability features. This paper provides an overview of some of the most important new features and describes how they might be useful for your repository. For more information on features and changes in Laserfiche 8, see the [Laserfiche 7 to 8 Comparison Guide](#) and the DevNotes [Laserfiche 8.0 Detailed New Feature List](#) page.

New Search Engine and Search Enhancements

Laserfiche 8 features a new search engine service that operates separately from the Laserfiche Server service. The new service offers expanded Unicode searching, as well as providing several new search features.

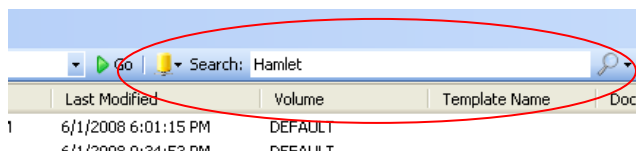
Search Within Documents

You can search across multiple pages within a specific document from the Document Viewer in the Laserfiche Client. Choose **Find** from the **Edit** menu, or type CTRL+F. You can continue to click Find Next to continue searching through the document.

Expanded Electronic Document Search

The Laserfiche 8 search engine can retrieve text from certain kinds of electronic documents, even if those documents have not had text generated for them during importing or in the Client. If the computer that the Laserfiche Server is installed on has the proper IFilter to extract text from these documents, and if the documents are indexed, the Laserfiche Search Engine will automatically extract text from the documents at the time of indexing. This will not create a text file in the Laserfiche repository, and if a text file already exists for the document, this process will not be run for that document; search engine text extraction makes documents searchable that have *not* already had text generated for them. This allows you to perform IFilter text extraction without installing IFilters on each Client workstation.

Quick Search



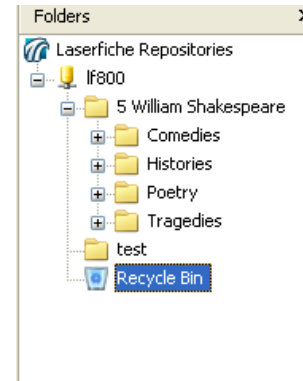
A quick search box is available from the toolbar in the Laserfiche Client, without leaving the folder pane. This

box allows you to type a search term and choose which search types you would like the quick search to use: text, entry name, field, annotation, or any

combination. You can also use the quick search in the standard search pane to quickly search across the same common search types as well.

Recycle Bin

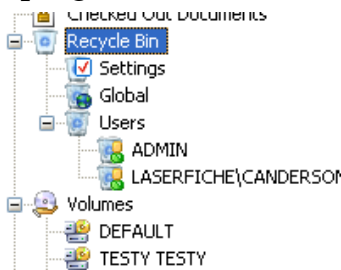
The recycle bin allows users and administrators the opportunity to review and restore deleted items before they are permanently purged. When a user deletes an entry, it is moved to a special folder. Users can see a list of documents they deleted, and, if they choose, can restore deleted documents. When a document is restored, all of the information for that document – including security settings and most metadata – will be restored also. Users with the **Purge Entries** privilege can permanently purge documents they deleted themselves, while users with the **Manage Entry Access** privilege can purge or restore any document from the recycle bin.



Name	Path	Type	Date Deleted	Creation Date	Deleted By
King Henry VIII	...	Document	6/1/2008 1...	4/22/1998 12:...	LASERFICHE\canderson
Love's Labour's L	...	Document	6/1/2008 9...	4/22/1998 12:...	ADMIN

A context menu is open over the 'Love's Labour's L' entry, showing three options: 'Purge' (with a red 'X' icon), 'Restore' (highlighted in yellow), and 'Purge All Entries'.

Privileged users can view the list of deleted items and, if they choose, restore or purge those items. In the Administration Console, they can review all deleted items or items sorted by the user who deleted them. Administrators can also configure how long an entry will wait in the recycle bin before it will automatically be purged, or can specify that entries should only be purged manually. This prevents accidental deletion and purging of important documents.



HTTP Server/Client Communication

The Laserfiche Server communicates with Laserfiche 8 client applications, such as the Laserfiche Client, using the HTTPServ protocol. This protocol is firewall-friendly and optimized for use over a wide-area network. It requires less configuration than DCOM, and no longer needs a compatibility component to work over a firewall. (The Laserfiche Server 8 does still use DCOM for legacy compatibility with Laserfiche 7 client applications.)

Trustee Management

Improved Windows Account Handling

Like Laserfiche 7, Laserfiche 8 allows you to add Windows domain account users and groups directly to your repository, so that they can log in using Windows authentication rather than needing to type a username and password. Laserfiche 8 introduces the ability to treat these domain users and groups like any other user in Laserfiche. Thus, administrators can grant security rights – feature rights, access rights, privileges, and tags – directly to these domain users and groups, configure auditing for them, and otherwise treat them exactly the same as Laserfiche trustees.

This ability simplifies user and group administration and maintenance. It is not necessary for an administrator to create new users manually; if a Windows account for a new user has been created on the domain, that user can simply be added to Laserfiche and administered normally, without needing to tie them to Windows trustees. If a user leaves the organization, the administrator can simply remove their Windows account; the corresponding Windows account in Laserfiche will also be removed. Furthermore, this ability allows users to authenticate directly to Laserfiche based on their Windows username; they do not need to remember an additional username and password for the repository. Additionally, if you add a Windows domain group, you do not need to add users who belong to that group to Laserfiche individually. If the groups to which a user belongs are permitted to log in to Laserfiche, then the user will inherit that ability to log in. Similarly, a Windows domain user's feature rights, access rights, privileges and other security information will be inherited from the group.

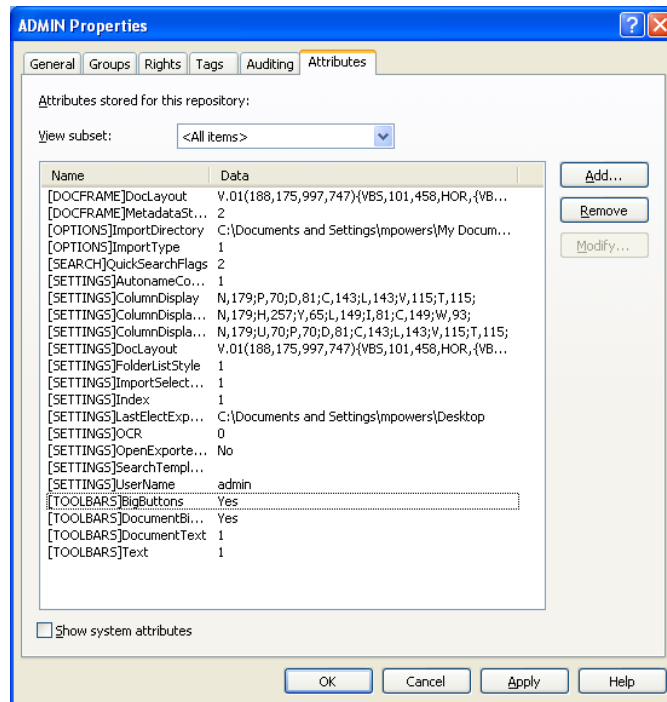
Trustee Attributes

Trustee attributes are the settings specific to a particular user that influence the way they use the Laserfiche Client. Trustee attributes include information such as what columns will be displayed in the Client and how they will be sorted, what Quick Search settings should be used by default, how the toolbar should be displayed, what import options should be used, how the document viewer should be displayed, and what scanning options should be used by default. They are specific to a particular user – if one user customizes the column display for the Client, they will thereafter see their own column display, but won't affect other users.

In Laserfiche 7, trustee attributes were stored in the registry. This allowed them to be specific to particular users, but also made them computer-specific.

In Laserfiche 8, trustee attributes are still user-specific, but are stored on the Server. This means that a user logging in on several different workstations will still always see the Client using their own settings.

Laserfiche 8 also introduces an interface that allows you to view and modify trustee attributes directly from the Laserfiche Administration Console, without needing to open or modify the registry. A user with the **Manage Trustees** privilege can log in to the Administration Console, open **Properties** for any Laserfiche or Windows Account user, and then select the **Attributes** tab. This tab lists all currently-set properties and their values. (If no property is set for an option, the user will use the default setting.) In this dialog, you can add or remove attributes, or copy attributes from one user to another. Additionally, by setting attributes on the Everyone group, you can create new default starting settings for all users.



Account Security

Laserfiche 8 introduces several new features that make it easier to manage your trustees and security policies. These features include the ability to generate a random password for users, the ability to ignore maximum password age, and the ability to lock an account that has been inactive for more than a certain period of time.

Annotation Enhancements

New Annotation Types

Laserfiche 8 introduces nine new annotation types. These annotations, as well as older annotation types, are now fully supported during PDF export – for

instance, a text box drawn on a Laserfiche document will remain a text box on the page if the document is exported as a PDF.

- **Underline** allows you to underline selected words. You can choose to underline the image or the text, or you can use annotation linking to underline both.
- **Strikethrough** allows you to strike out selected words. You can choose to apply strikethrough to the image or the text, or you can use annotation linking to strike out both.
- **Rectangle** allows you to draw a box on the document. You can use the Shape property to specify whether you want a rectangle, a rounded rectangle, or an ellipse.
- **Text Box** allows you to draw a box in which you can type comments. Unlike sticky notes, these comments will appear directly on the page when it is printed or exported.
- **Callout** is similar to Text Box, but includes an arrow pointing between a particular part of the image and the text box.
- **Line** allows you to draw a line or arrow on the document.
- **Freehand** allows you to draw or write on the document. Lines drawn are part of the same annotation, so that you can write words but still move the entire block rather than having to move individual letters.
- **Image** allows you to place a .bmp, .jpg or .gif image on the document. Unlike stamps, this can be a full-color image, and is used once rather than being saved for re-use.
- **Attachment** allows you to link directly to a file. The attachment will display the appropriate icon for the file type (for instance, a Word .doc will use the Word icon). Double-clicking the attachment icon will open the attachment in its native application.

Annotation Preferences

Annotation display settings can now be customized in many ways. While the exact display settings available will vary depending on the type of annotation (for instance, an attachment annotation does not have a line or fill color, and a sticky note will always have the same shape), in general it is now possible to customize the line color, style and thickness, fill color, shape, and opacity, among others.

You can also set annotations as 'protected' or 'private.' A protected annotation can only be modified by the person who applied the annotation and the document's owner. A private annotation is only visible to the person who created the annotation, and is useful for personal notes that are not relevant or necessary to other users.

You will also be able to preview changes to your annotation using the preview pane.

Sticky Note History

When sticky note history tracking is enabled, all changes to the text of a sticky note will be recorded, along with the date and time they were made and the user who made them. Users with the rights to see the sticky note will be able to review the entire sticky note history. Any user who can modify a sticky note can enable history tracking for that sticky note, and users with the **Manage Repository Configuration** privilege can turn sticky note tracking on or for the entire repository.

Field and Template Enhancements

In Laserfiche 8, fields exist independently from the templates that contain them. In other words, a template collects a number of fields – which can be created separately from the template – rather than defining the fields. This has a number of advantages for the administrator and the user.

An administrator can create a single field (for instance, a field named "Author") and apply it to more than one template. This saves time, as the admin no longer need to create an "Author" field for each template whose filing date he or she wishes to track. More importantly, it allows for more efficient searching for the user, since you can search for a particular author in any of the "Author" fields in the repository, regardless of what template they are a part of. Furthermore, you can merge existing fields into a single field. For instance, you might want to merge fields created in a Laserfiche 7 template, or you might create an Author field and a Source field and decide later that you want them to be a single field.

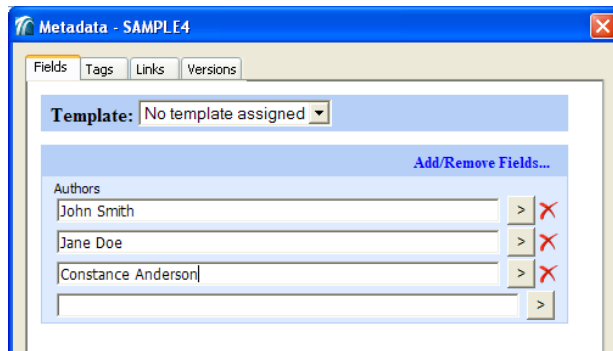
An administrator can also delete a template without deleting all the fields contained by the template, or can make changes to a field that will apply to all instances of the field in the repository. Furthermore, users with appropriate rights can add fields directly to documents without needing to add them to a template first. For instance, if a few certain documents should have the "Routing Information" field, but most documents do not need it, a user could

simply set the "Routing Information" field directly on those documents that need it, regardless of the template that is applied to the document.

Laserfiche 8 also includes several new annotation types, including Time, Number, which supports decimal and negative numbers, and Data, which is useful for integrations and customizations.

Multi-Value Fields

Among other template and field enhancements, Laserfiche 8 will feature multi-value fields. A multi-value field allows you to store more than one piece of information easily within a single field. For instance, you could create an Author field as a multi-value field. Then, if you needed to store a report or other document that had been worked on by more than one person, you could simply save each author's name as a value within that field. Multi-value fields automatically expand as you fill them to contain as many values as you need.



If you search for a value that is contained within the multi-value field, the document or folder will be returned if any of its values match your search. For instance, if you have an e-mail with many e-mail addresses stored in a Recipients list, you can search for any one of those e-mail addresses and retrieve the original e-mail.

Additionally, any length limitations or constraints for the field will be applied to each value within the field. If you have set up a constraint to force all phone numbers to be stored in 123-456-7890 format, this constraint would be in effect for each of the phone numbers stored in that field. All field types can be set to be multi-value fields.

New Security Features

Laserfiche 8 includes several new security features. For more information, see the [What's New in Security for Laserfiche 8](#) white paper.

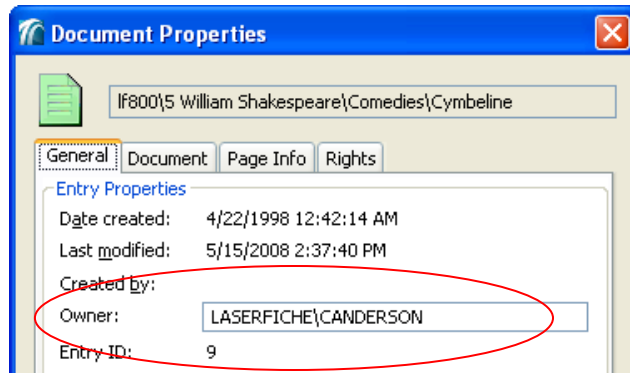
Default Security

Whenever you create a new volume, template or field, Laserfiche creates a starting set of security for that new object. In Laserfiche 8 you can customize

the starting default security for your volumes, templates and fields. Laserfiche will then automatically apply your default security to all objects of that type that are created after that point. (Default security won't affect volumes, templates or fields that have already been created, and physical sub-volumes of logical volumes will have security settings that match their parent volume.) You can configure default security by user, group or Windows account, just like regular security. You can also grant special rights to the object's creator.

Entry Ownership

Entry ownership allows a user specified as a document's owner the ability to manage his or her own documents without needing to involve an administrator. Entry ownership confers the ability to modify security on the entry in question. By default, entry ownership is granted to a



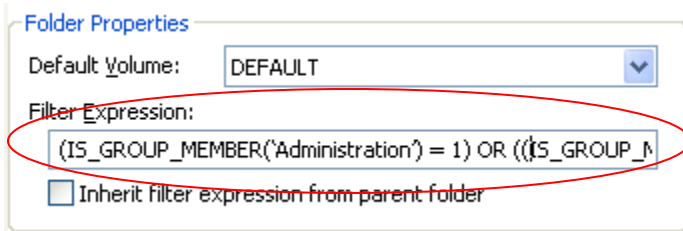
document's creator. If you wish to change the default document owner, or if you want documents to be created with no default owner, you can change default document ownership.

Folder Tunneling

In some cases, you might want to grant users or groups access to folders that are 'buried' beneath folders to which they don't have access. For example, you might want users to be able to access their own personal folder, but not the rest of the department folder in which it resides. You can do this by creating a shortcut to that folder. You will need to place the shortcut in a folder to which the user *does* have sufficient rights, so they can navigate to it. They will also need to have the rights to access the folder to which the shortcut points, but they don't need rights to the folders in between.

Folder Filter Expressions

Folder Filter Expressions are a dynamic form of security that uses an advanced syntax string to determine what users should be able to access which documents within a folder. A user with the **Manage Filter Expressions** privilege for the repository and the **Write Entry Security** entry access right for the folder can build a filter expression specifying what criteria should be used



to determine access to the entries; when a user opens the folder, the Server will use this criteria to determine what documents they should be able to see.

New Access Rights and Privileges

Laserfiche 8 offers several new access rights and privileges that allow you to manage documents and divide administrative roles more easily. The **Delete Pages** entry access right controls whether a user can delete pages in a document. The **Bypass Browse** and **Bypass Filter Expression** privileges determine whether a user should be able to bypass certain security settings; granting this right confers a significant performance benefit, since the **Browse** right or the folder's filter expressions do not need to be checked for each document or folder. The **Purge Entries** privilege controls whether a user should be able to permanently delete their own items when the recycle bin is enabled. Finally, the abilities formerly granted by the **Manage Metadata** privilege have been split into several new privileges: **Manage Templates and Fields**, **Create Templates and Fields**, **Manage Stamps**, **Manage Tags**, and **Manage Links**. This allows you to divide administrative tasks – a user can be granted the ability to create new fields without also being granted the ability to manage security tags, for instance.

System Managers

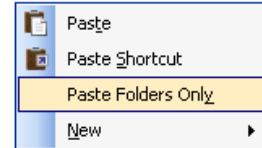
In Laserfiche 7, system management operations (such as creating repositories, registering and unregistering repositories, performing traces, or monitoring license use) were controlled by a single system management password. To make system management more secure and flexible, Laserfiche 8 now allows you to specify which Windows domain users will be system managers. By default, members of the Local Administrators Windows group on the computer hosting the Laserfiche Server are system managers. You can add or remove additional Windows domain users and Windows domain groups as system managers. Note that system managers are only able to perform certain high-level Server maintenance tasks; setting a domain user as a system manager does not grant that account access to the contents of the repository itself.

Folder Browser Enhancements

Folder Copying and Folder Structure Copying

You can now copy and paste folders and their contents directly in the Laserfiche Client. A standard copy and paste will copy the folder and all of its contents (including the contents of its subfolders). Note that copying and pasting a folder with many subfolders can be a very time- and resource-intensive process.

You can also choose to copy a folder and paste only its folder structure, without the documents contained in the folder and subfolders. This is useful for replicating a frequently-used folder structure, such as a set of folders for a client.



Shortcuts to Documents or Folders

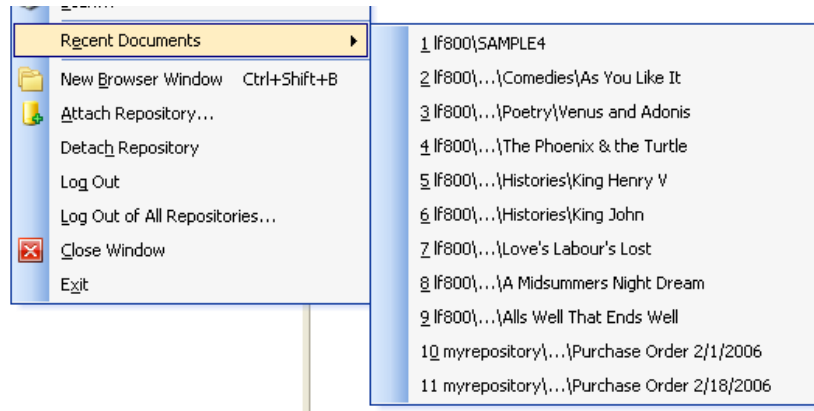
You can create a desktop shortcut directly to a particular document or folder in Laserfiche. To create a link to a folder, simply select the folder and drag it onto your Desktop or into Windows Explorer. When you drop the folder, it will create a link with the same name as the folder and with an .lfe extension. When you click this link, it will open the Laserfiche client directly to the folder in question. You can also create a link to a document by holding down CTRL and SHIFT while dragging and dropping. (Simply dragging and dropping the document without holding down these keys will export it rather than creating a link.)

Default Volumes on Folders

You can assign a default volume for a folder's contents in the folder's advanced properties dialog. This will set the default volume for all documents newly scanned, imported or created in that folder to the specified volume. It will not affect already-created documents that are moved to the folder, and will not prevent a user with sufficient volume rights from migrating the document to another volume after it has been created.

Recent Documents

You can jump directly to documents you have recently opened using the Recent Documents command in the File menu. This list of recently-viewed



documents is specific to each user. Selecting a document from this list will open it immediately in the Document Viewer.

Navigation Bar

The Laserfiche 8 Client features a navigation bar similar to the one available in Windows Explorer. The navigation bar is a text box that displays the folder path to the currently-open folder. You can type a different folder path in the bar to jump directly to another folder, or use the dropdown to view the list of recently-opened folders and select one to open.

Fully Customizable Toolbar and Shortcut Keys

The Laserfiche Client toolbars are now fully customizable, and you can assign and customize shortcut key combinations to tasks in the Laserfiche client. Right-clicking the Laserfiche toolbar will open the Customize Toolbars dialog. From here, you can add or remove commands on the toolbar, set new keyboard shortcuts, and even create new toolbars.

Audit Trail Reporting

Audit Trail 8 includes a new web-based audit reporter. This allows you to configure and create audit reports, view them in your web browser, save report configurations to run in the future, and export reports as a comma-separated list. This web interface provides a way to easily create and read audit reports – furthermore, it's no longer necessary to have an Administration Console available to view an audit report.

You can create and constrain audit reports just as you would have in Laserfiche 7. You can select the events you would like to report on or limit

the report to a particular timeframe or set of users. You can also create advanced constraints – for instance, you could create different reports for different Laserfiche products (for instance, the Client or Web Access), or to report on particular error codes.

When the audit report has been created, the user creating the report can preview the report, reorder and resize the displayed columns, and determine how many items should be displayed per page.



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Author: Constance Anderson

Technical Editor: Justin Pava

Compulink Management Center, Inc.

Global Headquarters

3545 Long Beach Blvd.

Long Beach, CA 90807

U.S.A

Phone: +1.562.988.1688

www.laserfiche.com

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