



PRAIRIE VIEW A&M UNIVERSITY

Laserfiche Basic Navigation



Laserfiche

Laserfiche is the document imaging and records management software that the university is currently using.

It allows you to scan and store documents, whether it be in paper or an electronic format (ex. PDF).

Laserfiche Terminology



Repository - This is where your files are stored. It contains your documents, organized within folders.



Folder - They contain imaged documents, electronic documents, shortcuts, and other folders.



Imaged Document - When you create a document by scanning or importing pages into the repository, you create an imaged document.



Electronic Document - This is a document that contains an electronic file such as a Word document or PDF.



Field - They contain additional information about the document that you can use for reference or search and retrieval.



Template - This is a collection of fields that can help categorize documents or folders.



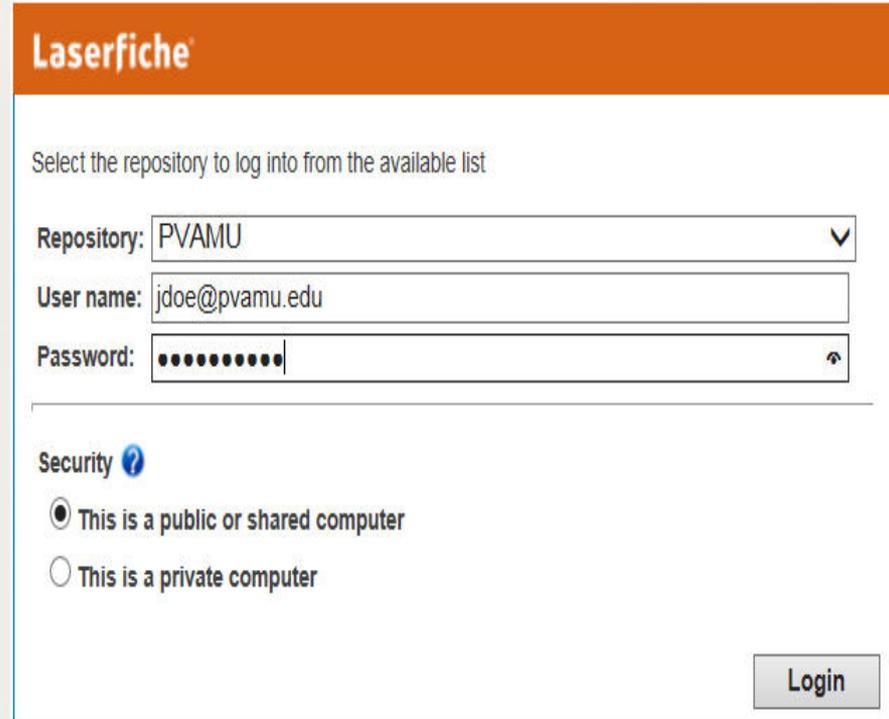
Metadata - This is a general term used to refer to information associated with a document. It consists of field data, tags, version information and linked documents.



Volume - This is how the Laserfiche Server organizes and manages files. When you create or import a document, you will specify the volume it will be stored in.

Laserfiche Login

- Laserfiche can be accessed via the internet (<https://edocs.tamu.edu/laserfiche/Login.aspx?db=PVAMU>)
- At the login screen, select the PVAMU repository from the drop-down menu and then enter your username along with the domain (jdoe@pvamu.edu) and then your password. Your login credentials are the same as the ones used to gain access to your PVAMU computer.



The screenshot shows the Laserfiche login page. At the top, there is an orange header with the text "Laserfiche". Below the header, the text "Select the repository to log into from the available list" is displayed. There are three input fields: a dropdown menu for "Repository" with "PVAMU" selected, a text box for "User name" containing "jdoe@pvamu.edu", and a password field with masked characters. Below these fields is a "Security" section with a question mark icon and two radio button options: "This is a public or shared computer" (selected) and "This is a private computer". A "Login" button is located in the bottom right corner.

Laserfiche Web Access Screen

The screenshot displays the Laserfiche Web Access interface. The interface is divided into several sections:

- Folder Pane:** Located on the left side, it shows a tree view of folders under the 'Training' category. The folders listed are: 0500 Academic Affairs, 6500 Business Affairs, Do Not Use, Scan, TEST_IN, Training Session Folders, and Recycle Bin.
- Toolbar:** Located at the top center, it contains various icons for file operations such as copy, paste, delete, and refresh.
- Quick Search:** A search bar located at the top right, labeled 'Search repository...'. A red arrow points to it from the 'Quick Search' callout.
- Contents Pane:** The main area of the interface, displaying a table of records. A red arrow points to it from the 'Contents Pane' callout.

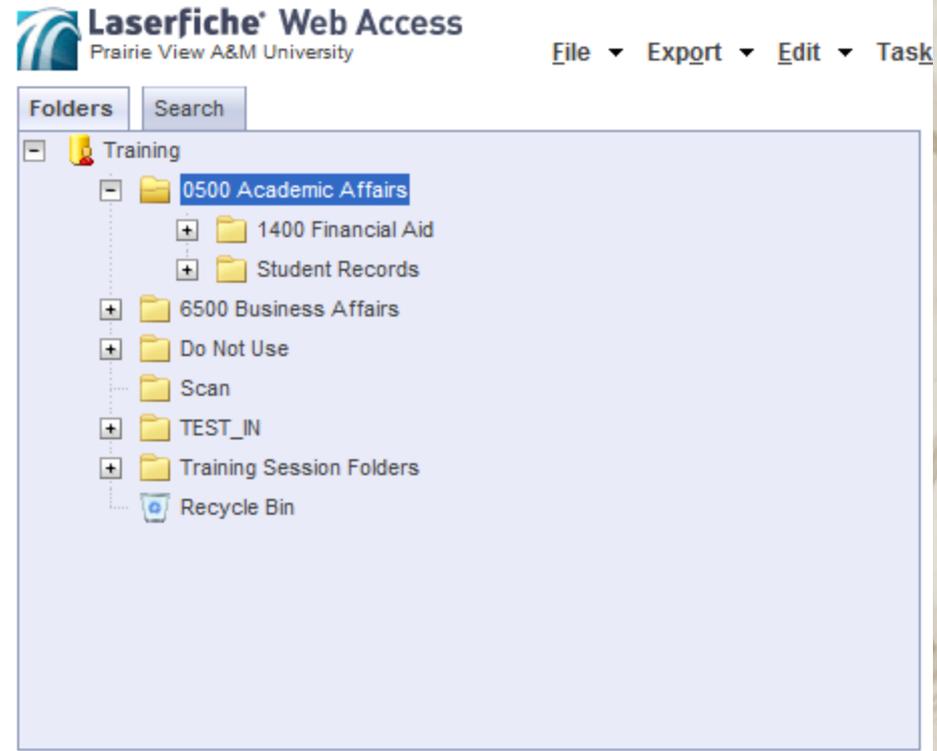
Name	Creation Date	Last Modif...	Pages	Template Name	Volume	OCR'ed ...	Created By	Type
0500 Academic Affairs	12/2/2011 10:14:27 AM	3/30/2012 11:...			TRAINING_DBI		Administrators	Folder
6500 Business Affairs	12/2/2011 10:14:36 AM	12/2/2011 10:...			TRAINING_DBI		Administrators	Folder
Do Not Use	9/22/2011 4:00:39 PM	3/5/2012 2:08:...			TRAINING_DBI		Administrators	Folder
Scan	3/14/2012 10:50:23 AM	2/5/2013 8:55:...			TRAINING_DBI		PV/MAMartinez	Folder
TEST_IN	3/19/2012 4:56:03 PM	11/19/2012 4:...			TEST_IN		PV/HNAbbasi	Folder
Training Session Folders	10/12/2011 12:23:37 PM	3/7/2012 3:40:...			TRAINING_DBI		Ijohnson	Folder

At the bottom of the interface, there is a status bar showing 'Training' and '6 entries'.

Folder Pane

In the Folder Pane you will see the folders that you have access to. If you click on the “+” sign beside the folder, it will expand and show the subfolders.

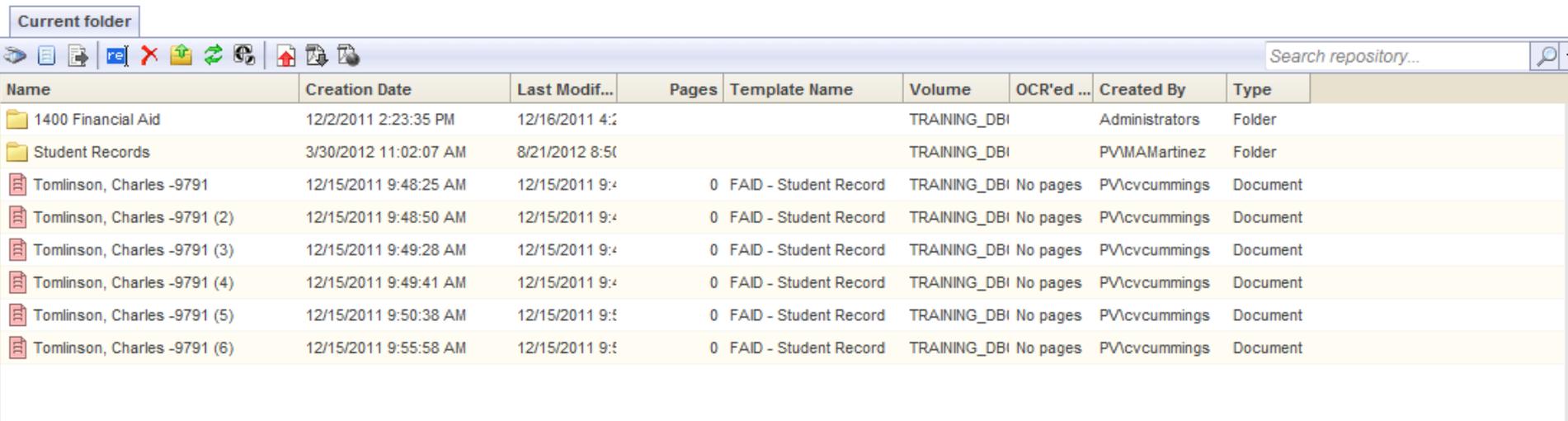
You will also see the Search tab. This is where you would perform searches on the documents with the folders that you have access to.



Contents Pane

The Contents Pane will show the information that is contained in the folders. When you click on a folder in the Folder Pane, the name of the folder and all its contents will be displayed.

There are various fields that provide information on the document and these fields can be customized.



The screenshot shows a digital repository interface. At the top, there is a 'Current folder' label. Below it is a toolbar with various icons for navigation and actions. A search bar labeled 'Search repository...' is located in the top right corner. The main area displays a table with the following columns: Name, Creation Date, Last Modif..., Pages, Template Name, Volume, OCR'ed ..., Created By, and Type. The table lists two folders and six documents.

Name	Creation Date	Last Modif...	Pages	Template Name	Volume	OCR'ed ...	Created By	Type
1400 Financial Aid	12/2/2011 2:23:35 PM	12/16/2011 4:2			TRAINING_DBI		Administrators	Folder
Student Records	3/30/2012 11:02:07 AM	8/21/2012 8:50			TRAINING_DBI		PVMAMartinez	Folder
Tomlinson, Charles -9791	12/15/2011 9:48:25 AM	12/15/2011 9:4	0	FAID - Student Record	TRAINING_DBI	No pages	PV\cvcummings	Document
Tomlinson, Charles -9791 (2)	12/15/2011 9:48:50 AM	12/15/2011 9:4	0	FAID - Student Record	TRAINING_DBI	No pages	PV\cvcummings	Document
Tomlinson, Charles -9791 (3)	12/15/2011 9:49:28 AM	12/15/2011 9:4	0	FAID - Student Record	TRAINING_DBI	No pages	PV\cvcummings	Document
Tomlinson, Charles -9791 (4)	12/15/2011 9:49:41 AM	12/15/2011 9:4	0	FAID - Student Record	TRAINING_DBI	No pages	PV\cvcummings	Document
Tomlinson, Charles -9791 (5)	12/15/2011 9:50:38 AM	12/15/2011 9:5	0	FAID - Student Record	TRAINING_DBI	No pages	PV\cvcummings	Document
Tomlinson, Charles -9791 (6)	12/15/2011 9:55:58 AM	12/15/2011 9:5	0	FAID - Student Record	TRAINING_DBI	No pages	PV\cvcummings	Document

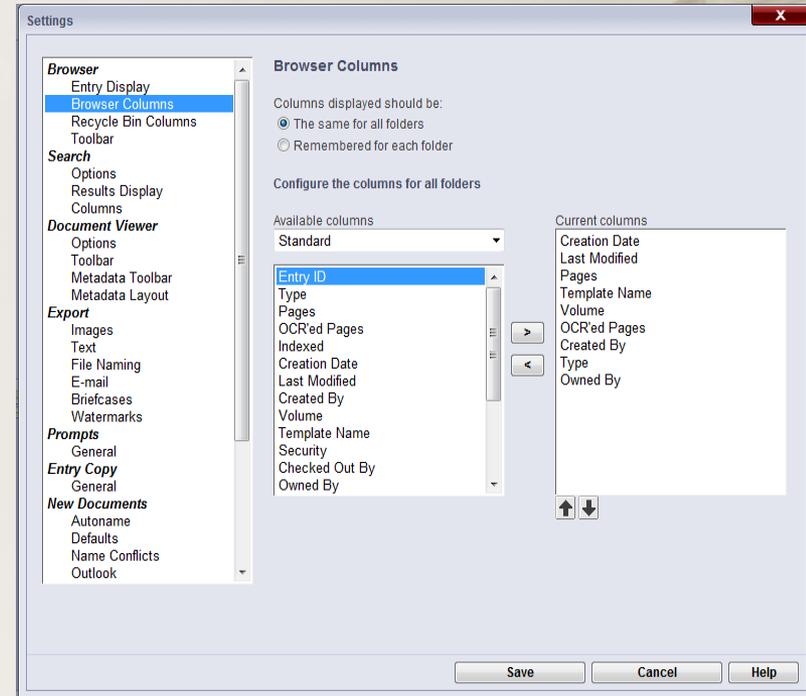
Content Pane - Fields

The fields that are displayed can be changed.



Name	Creation Date	Last Modif...	Pages	Template Name	Volume	OCR'ed ...	Created By	Type
1400 Financial Aid	12/2/2011 2:23:35 PM	12/16/2011 4:1			TRAINING_DBI		Administrators	Folder
Student Records	3/30/2012 11:02:07 AM	8/21/2012 8:50			TRAINING_DBI		PVMAMartinez	Folder

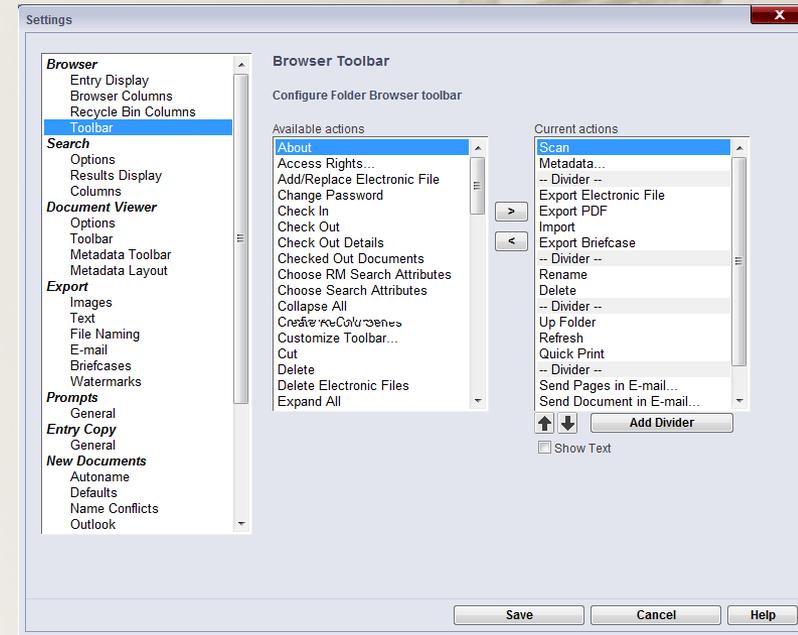
1. You can make changes by either doing a right-click on the toolbar or by clicking on Settings.
2. The Settings window will open up. Make sure you are looking at the section titled **Browser**.
3. Click on *Browser Columns*.
4. Select from the left side the columns that you want and then click on the arrow key to move them over to the right.
5. Click on **Save**. The new columns should now be displayed.



Toolbar

The Toolbar can also be customized. You can access the settings by either performing a right-click on the toolbar or by clicking on the **Settings** button.

1. You can go through the list of Available Actions on the left and select what you want.
2. Once you have selected then click on the arrow to move it to the Current Actions section on the right.
3. You can also remove items that you don't need.
4. Once you are done you can click on Save when you are done.

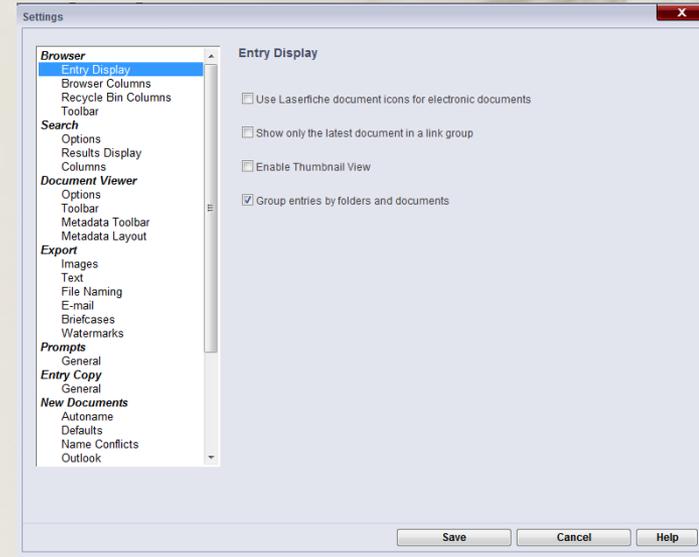


System Settings

You have the ability to change the settings by clicking on the Settings Button.

[@PVARS](#) | **Settings** | [Help](#) | [Support Site](#) | [Log Out](#)

- In the Settings window, you can go in and change different aspects of how you either view or work with documents.
- Each section has different options that you can modify.
- Once you click on the section you will see the options open on the right side of the window.
- Once you have finished making all your changes, you can click on **Save**.



System Options

The ability to use all of the system options shown here will depend on the User Group that you are assigned to, whether it's the Scan, View, or Records Manager Group.

File

- Open
- New Folder
- New Shortcut
- New Document
- Rename
- Delete
- Import...
- Scan...
- Print List Contents
- Send Document in E-mail...
- Recent Documents
- Recycled Items...
- Metadata...
- Access Rights...
- Properties...

Export

- PDF...
- Images...
- Text...
- Electronic File...
- Briefcase...
- List Contents...
- Folder Contents...
- Search Results

Edit

- Redo Ctrl+Alt+Y
- Undo Ctrl+Alt+Z
- Cut
- Copy
- Paste
- Paste Shortcut
Paste Folders Only
- Move to Folder

Tasks

- Generate Searchable Text...
- Generate Pages...
- Add/Replace Electronic File
- Delete Electronic File
- Migrate Entries
- Check In/Check Out
Version Tracking
- Checked Out Documents

Records

- Create Record Series...
- View Record Properties...
- Record Management Actions...
- Frozen Status...
- Review Vital Records...
- Print File Plan/Disposition Instruction
Export File Plan/Disposition Instruction

Document Viewer

Double-click on a document it will open in a new tab and this is your Document Viewer screen. The Document Viewer allows you to view your document's images, text, thumbnails and field data. Depending on your user privileges you can make changes to a document

The screenshot displays the Laserfiche Web Access interface. The top navigation bar includes 'File', 'Export', 'Edit', 'View', and 'Tools'. The left sidebar contains 'Metadata' and 'Thumbnails' panels. The main content area shows a document titled 'Importing PDF's into Laserfiche' with the following text:

Importing PDF's into Laserfiche

Documents stored in Laserfiche must be in the TIFF format, which is the native format for Laserfiche.

Import Settings

To be able to import PDF's into Laserfiche, you have to first setup the default settings.

1. Go to the "Settings"
PV: ... @PVAMU **Settings** Help | Support Site | E
Search repository...
2. When the following window opens up, make sure that under the "When importing PDF files" section that you make sure the "Generate Laserfiche pages" and the "Preserve PDF annotations on Laserfiche pages" boxes are checked. Also uncheck the "Keep original PDF files". Click Save.

The bottom status bar shows 'Training > TEST_IN > Laserfiche Importing.pdf' and '5, 555 | 34% (Fit-to-Width) | Image: 2550 x 3300'.

Document Viewer

Metadata Pane

Add additional information to organize your documents.

Image Pane

The document image.

Text Pane

Add or modify searchable text.

The screenshot shows the Laserfiche Web Access interface. The main window displays a document titled "Importing PDF's into Laserfiche". The document content includes a section titled "Import Settings" with a list of steps: "1. Go to the 'Settings'" and "2. When the following window opens up, make sure that under the 'When importing PDF files' section that you make sure the 'Generate Laserfiche pages' and the 'Preserve PDF annotations on Laserfiche pages' boxes are checked. Also uncheck the 'Keep original PDF files'. Click Save." The interface also features a Metadata Pane on the left with a "Template" dropdown set to "No template assigned", a Thumbnail Pane below it showing "Page 1" and "Page 2", and a Text Pane on the right showing the document's content. A breadcrumb navigation bar at the bottom of the document viewer shows "Training > TEST_IN > Laserfiche Importing.pdf".

Thumbnail Pane

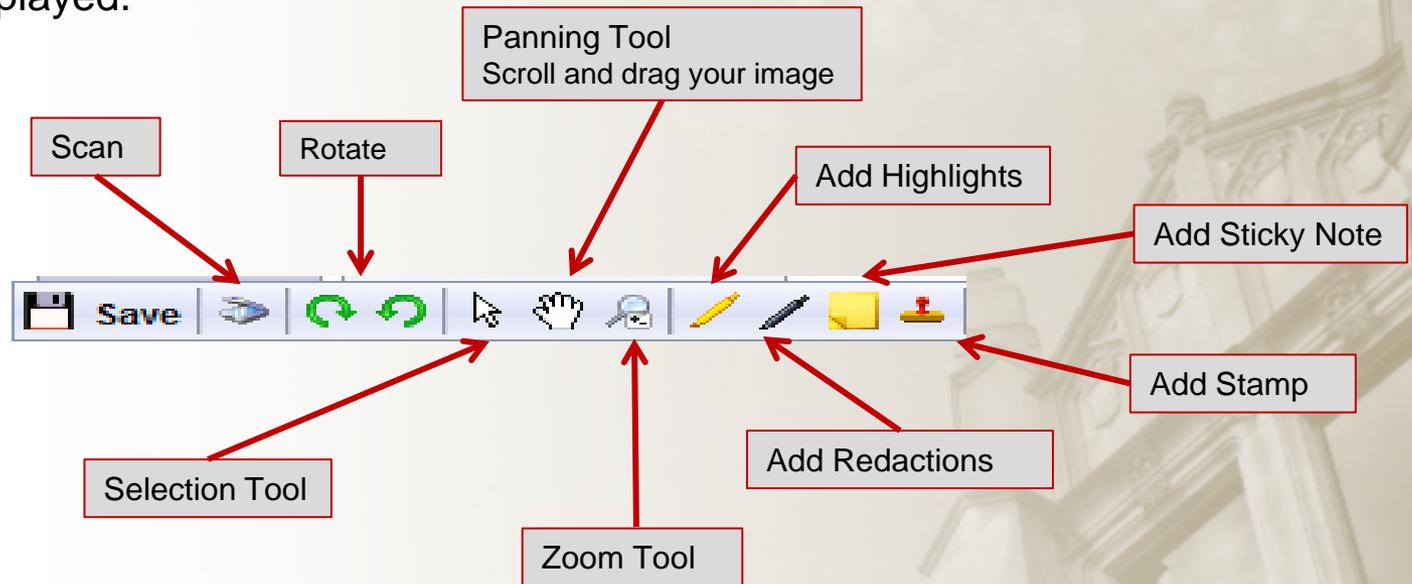
View pages at a smaller scale for easier navigation.

Breadcrumb Navigation

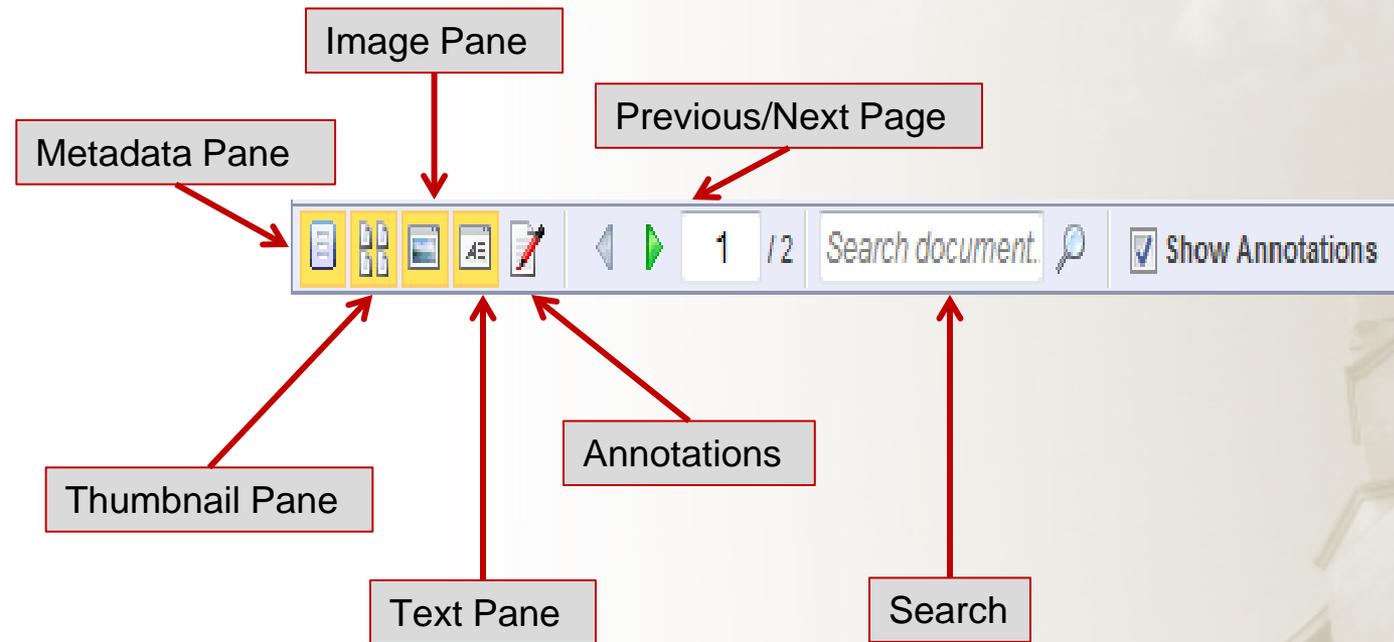
Links are provided to each previous folder you navigated through to get to your current location.

Document Viewer Toolbar

The Document Viewer toolbar allows you to perform basic operations, such as adding image and text annotations, zooming in and out of the image, and determining what type of information is displayed.



Document Viewer Toolbar



Questions



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