

ECS Newsletter

"Your Source for Document Management"

MAY 2008

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Laserfiche Specials

Five full-featured (FX) licenses* with any new purchase of WebAccess™, a savings of \$3,750 off the retail price.

Five retrieval (Rx) licenses* with any new purchase of WebLink™, a savings of \$1,500 off the retail price.



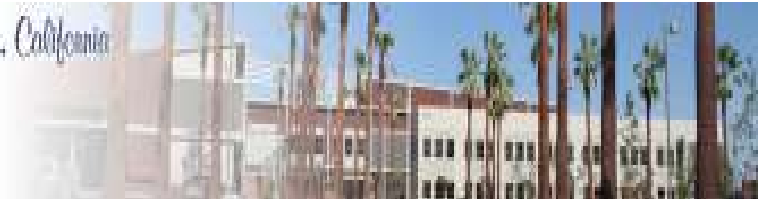
The Xerox DocuMate 262i Scanning Paper or Plastic-Fast and Easy

There's a lot about the Xerox DocuMate 262i that will make it your favorite desktop device. This latest DocuMate is packed with features that will change how you look at and manage paper documents and information. The DocuMate 262i is the fastest, most technologically advanced and easiest to use document scanner in its class

[Click here to view full Description](#)

Spotlight

TOP



Congratulations to our customer Vicki Soderquist, City Clerk for The City of Hesperia on winning The Innovation with Laserfiche Award at this years CCAC conference.



The City of Hesperia has used Laserfiche since 2001. Vicki had used Laserfiche at a city she worked at previously and knew she wanted to bring it to this City as soon as possible. Vicki has known and worked with ECS for over 12 years between the two cities!

Vicki started using Laserfiche first in the City Clerks office. Last year the clerks office processed over 10,000 public records requests. Vicki says now they just respond to the majority of those by sending the documents via email through Laserfiche. They are also planning to post the Laserfiche documents on Weblink in the new fiscal year to provide more access to employees internally. Eventually to help alleviate many of those public requests they will deploy Weblink on their website.

Laserfiche then spread to the community development department for quick access to plans. ECS Imaging scanned many of their plans to get them caught up and has continued to on an annual basis for them.

Most recently the finance department has come on board to start scanning. And Vicki is implementing the Laserfiche Agenda Manager product to streamline their agenda packet creation process. Along with the Agenda Manager they will be using Granicus' integration to import the agenda packet directly into the Granicus Minutes Maker.



Please let us know as soon as possible if you plan to attend.

We want to ensure meeting space and rooms are reserved to accommodate everyone.

Special Room rate \$99/night
Tues-Thurs night.

Fri/Sat rate \$189

Room code is S09ecs

Website links:
[Harrah's Lake Tahoe](#)

[Tahoe Visitors Page](#)

[Map and Info](#)

[Photos from previous conferences](#)



**Harrah's Hotel , Lake Tahoe, NV
September 10-12 , 2008**

September 10: **Optional Training Day**

- 8:30 a.m. – 4:30 p.m.
- \$395 per seat with advance payment
- Basic Laserfiche 8 Training

September 11: **Complimentary Conference Day**

- Training: 8:00 – 4:30 p.m.
- Breakfast and Lunch included
- Cocktail Hour: 4:30 – 5:30 p.m.

September 12: **Complimentary – Half Day**

- Consulting and Best Practices: 8:00am – 12:00pm
- Breakfast Included

Conference and Training Registration

To register for the conference

Send your contact information to Sales@ecsimaging.com.

Please let us know which days you will be attending.

*Early bird registrants before July 31st will receive a free gift.

To register for Optional LF Institute Training:

- Call (951)787-8768 x 107
- Just 25 spots available for hands on training with laptops - Register Today!

Join us at our 2nd Quarter User Group at Queen of the Valley Medical Center in Napa - May 9th

These events are offered with no charge to our customers. Connect with other Laserfiche users and learn new solutions for your Laserfiche system. Our user groups introduce our customers to each other and to the latest technologies.

Join us to learn what is new in 2008.

Friday, May 9th in Napa

Schedule 8:30am – 4:00pm ([map](#))

[Click to see the schedule](#)

<p><u>Wed., May. 14, 2008</u> 9:00 a.m. Pacific <u>Wed., May. 21, 2008</u> 9:00 a.m. Pacific <u>Wed., May. 28, 2008</u> 9:00 a.m. Pacific</p> <p><u>Register</u></p>	<p>Document Management 101</p> <p>Learn how digital document management helps you find files faster, reduce storage space costs and improve information security.</p>
<p></p> <p><u>Register</u></p>	<p>Digital Signatures for Document Management</p> <p>Learn now from industry experts in a fifteen minute web seminar. Learn how to Reduce operational costs, Expedite Approvals, Comply with regulations and much more! See how CoSign can pay for itself in as little as 30 days!</p>
<p><u>Thu., May. 29, 2008</u> 11:00 a.m. Pacific</p> <p><u>Register</u></p>	<p>18 Minutes to More Intelligent Searching</p> <p>Learn how to balance the demands of capturing records with the need to retrieve information quickly for internal and public requests.</p>
<p><u>Tue., May. 13, 2008</u> 9:00 a.m. Pacific <u>Tue., May. 20, 2008</u> 11:00 a.m. Pacific</p> <p><u>Tue., May. 27, 2008</u> 11:00 a.m. Pacific</p> <p><u>Register</u></p>	<p>Laserfiche 8 - Client and Scanning</p> <p>An introduction to the new features of the Laserfiche 8 Administration Console.</p>
<p><u>Wed., May. 14, 2008</u> 8:00 a.m. Pacific <u>Wed., Feb. 28, 2008</u> 9:00 a.m. Pacific</p> <p><u>Register</u></p>	<p>Simplify Agenda Creation, Management and Distribution with Laserfiche</p> <p>The complexity of preparing agendas often rivals the importance of the documents themselves. Laserfiche Agenda Manager simplifies every aspect of the agenda creation process, from the submission of proposed agenda items to the publication of the final agenda packet. Attend this Webinar to learn how this easily-implemented, Web-based solution promotes smarter agenda management throughout your organization—without disrupting the way you work</p>

Tech Tips

TOP



**Power Up and
Get Connected.
Visit the Laserfiche**



New privileges in Version 8

Support and User Information [Site](#)

We encourage you to take advantage of the resources available 24 hours a day.



Support Site

Current Versions

- Client-Server 7.2.1
- Plus 7.2
- WebAccess 7.2
- Quick Fields 7.1.2
- Agenda Manager 7.2
- Audit Trail 7.2
- Email (Mapi) 7.1
- Integrator's Toolkit 7.2
- Scan Connect 7.1
- Import Agent 7.0.2
- Integration Express-H.T.E 7.0
- Snapshot 7.0.3
- WebLink 7.0.5
- Workflow 7.0
- Toolkit 7.2.1

The Laserfiche 8 Client allows you to copy folders (with or without content) to other Laserfiche folders. The copied folder will retain the volume and metadata information previously assigned to it and will retain all contents (documents and folders). Note that you cannot copy a folder that has a document checked out for editing or copy a folder into one of its own sub folders. You can, however, copy a folder into the same root folder. It will duplicate that folder and give you a prompt allowing you to rename it.

Purge Entries

Laserfiche 8 includes a new recycle bin feature, which allows administrators and users to review documents that have been deleted before they're permanently purged from the repository. Administrators with the Manage Entry Access privilege can review, restore and purge any deleted entries, and users with the new Purge Entries privilege can purge entries they have deleted themselves. Granting this privilege allows users to manage their own deleted documents and determine whether they should be permanently removed. If you would like a user to be able to decide whether a deletion should be permanent, you should give him or her this privilege. For more information, see the Recycle Bin chapter of the Administration Console help files.

Manage Filter Expressions

Folder filter expressions are new security features that allow administrators to set security dynamically. A filter expression is an advanced string defined by an administrator and set on a folder, which uses the field values of individual entries within the folder to determine which users should be able to access which entries. The Manage Filter Expressions privilege determines who can set filter expressions on folders in the repository. (The user must also have the Write Security entry access right for a folder to set its filter expression.) For more information, see the Folder Filter Expression section of the Administration Console help files.

Bypass Browse and Bypass Filter Expressions

As security grows more granular and complex, the Laserfiche Server must perform more security checks to determine whether a particular document should be displayed to a user. This does not generally impact performance when browsing a repository, but returning a search results list with many hits may be slower, as the Server must calculate security for each entry in the search results before they can be displayed. The Bypass Browse and Bypass Filter Expressions privileges speed up security calculations by allowing the Server to ignore the Browse right or the parent folder's filter expression for the user the privileges have been applied to.

Because these privileges ignore the Browse right and the folder filter expressions in the repository, they should only be granted if you are not

using these security features to restrict access for that user. For instance, if certain users have the Browse right for the entire repository, you should grant them this privilege in order to improve system performance, given that it does not grant them access to any document they wouldn't be able to see anyway. Similarly, if you are not using folder filter expressions in your repository, you should grant the Bypass Filter Expressions privilege to the Everyone group, because it will improve performance without affecting access. However, if you do choose to use filter expressions, or if certain users should have their Browse access restricted, they should not be granted these privileges.

In a new repository, Bypass Browse and Bypass Filter Expressions are granted to the Everyone group by default. In a migrated repository, only Bypass Filter Expressions is granted to the Everyone group, given that the folder filter expression feature was not present in Laserfiche 7 and therefore will not be relevant in a newly migrated repository.

Distributed Metadata Privileges

In Laserfiche 7, the ability to modify metadata types was controlled by a single privilege, Manage Metadata. In Laserfiche 8, Manage Metadata has been split into several separate privileges: Manage Templates and Fields, Create Templates and Fields, Manage Stamps, Manage Tags and Manage Links. This allows you to distribute the ability to modify metadata to exactly the users who need particular rights. It's no longer necessary, for instance, to grant the ability to modify tags (which can be very powerful, in the case of security tags) along with the ability to create or modify a field. Additionally, due to new template and field rights, it's not necessary to grant the Manage Templates and Fields right simply to allow a user to modify a particular template or field. The user only has to be granted the appropriate rights for that particular field or template.

Laserfiche Routing activities

Note: Watch the interactive Laserfiche Guided Help [video](#) that shows this workflow in action.

In Workflow 8, the process of building a workflow is now easier than ever with the introduction of **activities**. An activity is a single, pre-built, configurable process, and Workflow 8 contains over 30 of them. In this Tech Tip, we'll explore an especially useful group of activities: Laserfiche Routing activities.

Super Activities

Most Workflow 8 activities are designed to perform a single task, but Laserfiche Routing activities have the ability to accomplish a number of tasks in one step. In addition to routing Laserfiche entries, activities in this group can:

- Assign a template or tag to an entry.

- Populate fields.
- Send an e-mail.
- Use wait conditions.

There are three Laserfiche Routing activities: Route Entry to Folder, Route Entry to Group and Route Entry to User.

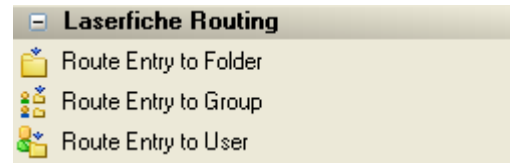


Figure 1: Laserfiche Routing activities are stored in the Toolbox Pane.

Real Life Example

It's Jacob's job to process sales orders. When a new order is scanned into the Laserfiche repository, the Route Entry to User activity has been designed to:

- Route the sales order to Jacob's folder.
- Assign the **Sales Order** template to the document.
- Tag the order **Being Processed by Jacob**.
- Send a notification e-mail to Jacob.

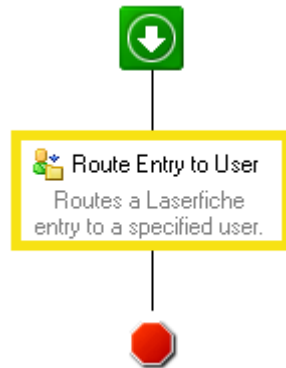


Figure 2: The activity in the Designer Pane.

Using a **wait condition**, the workflow will wait for Jacob to process the order before performing any additional activities the workflow might contain. To notify Workflow 8 that the order has been processed, Jacob adds the **Processed by Jacob** tag to the sales order.

```
If all of these conditions are true
  Entry : Tag (Processed by Jacob) is set
```

Figure 3: Wait conditions must be satisfied before the workflow proceeds to the next step.

Flexible Licensing

In Laserfiche 8, administrators determine whether users log in to the repository using a full-featured or a read-only connection. What happens in the following scenario:

1. An administrator grants a user read-only access to the repository.
2. The user needs to log in to the repository, but all read-only licenses are in use.
3. Full-featured licenses are available.

When this scenario occurs, there is a way for the user to connect to the repository using a full-featured license.

A feature called Flexible Licensing determines what occurs in this situation. If an administrator enables Flexible Licensing, then the user can log in using a full-featured license. In accordance with the administrator's settings, this user will, however, have read-only access to the repository.

You enable Flexible Licensing in the Laserfiche 8 Administration Console:

Settings [?] [X]

General

Server Communication

Listening port:

Notification port:

LFAPI port:

Default Repository

Name:

Flexible Licensing

Allow read-only sessions to draw from read-write pool.

OK Cancel Apply Help

As a reminder, you'll need to restart the Laserfiche Server Service in order for your change to take effect.

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Our Services

- Scanning Services
- Microfiche/Film/Aperture Card Conversions
- Hosted WebLink
- Custom Programs: Case# Generator, Mug Shot Capture, Six-Pack Creator
- ECS Integration Library Tool
- Custom Integrations: ESRI, Permits Plus, CRW, H.T.E., Navision, Eden, Munis, Oracle, DataTel, PeopleSoft, Digital Recorder Importer
- Fax Server Solutions
- Turn-key Implementations

Software



Document Management Software

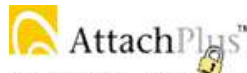
Integrations



Agenda Manager Integration



ESRI Integrations



Email & Data Encryption



Court Case Management Integration



Check Scanning & Remittance processing Integration

Archiving



UDO, WORM compatibility & Email Archiving Solutions

Kofax Product Suite



Virtual ReScan



Adobe LiveCycle Barcoded Forms



Fax Server Solution

Scanners



Elite Channel Partner



Premier Partner



E-size Map Scanners

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