



ECS Imaging Newsletter

Helping Companies Go Paper-Less

June 2010
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Volume VIII Issue VI



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Get ready for the Event of the Year! ECS Imaging’s Annual Customer Conference 8th year in a row!

Location: Embassy Suites, San Francisco Airport: Burlingame

Come and get the latest updates, additional training,
and an opportunistic environment for industry
networking!

COMPLIMENTARY 2-DAY CONFERENCE!

REGISTRATION NOW AVAILABLE!

Thursday, September 23, 2010 (8:00am-5:00pm)

Three Breakout Sessions with Training at All Levels

- Case Studies
- Integrated Solutions
- Workflow & Quick Fields
- User & Admin Training
- Weblink 8 Customizations
- E-Forms Creation, Digital Signatures & **MORE!**

Your ECS Imaging
Account Managers

- Debbi Bodewin
- Bob McCowan
- Pete Herschelman
- Tim McGrath
- Steve Walter
- Andrew Albers

Friday, September 24, 2010 (8:00am-4:00pm)

Two Breakout Sessions with Training at All Levels

- Individual Training and Consulting
- Power User Training and Consulting
- Expert Level Training and Consulting
- Roundtables

Daily Breakfast, Lunch & Happy Hour included in stay.

ECS Imaging's Northern California office would like to say a warm **Welcome to Michele Waddell. She will be relocating to our Northern California office starting June 1st!**



Michele started with ECS Imaging in 2001 as a scan operator. She was the fastest operator and excelled quickly at learning Laserfiche. With her technical background and enthusiasm, she quickly became a Technical Associate. She continued to challenge herself and conquered learning the most advanced products and concepts. In a very short time, Michele became the "ECS Answer Lady"! If you could stump her with a question at ECS' 1st Annual conference in 2003, you would get a free T-shirt or prize. The intent of the game was to be fun and informational, but what happened was she knew too much and hardly anyone won a prize.

Michele continued her knowledge to master and get certifications in all the products such as Workflow, Quick Fields and Audit Trail. In fact she was one of the first techs in the world to get certified in these products at Laserfiche Headquarters. She's worked with Versions 5, 6, 7, and 8 of Laserfiche. She's won many awards for being an outstanding technician. She's officially a Laserfiche certified professional as of January 2010 when the new certification program was launched at the Annual Laserfiche Institute. After 9 years working in the ECS Imaging headquarters, we will greatly miss seeing her on a day-to-day basis, yet we know our northern CA customers will be served with an outstanding technical analyst and trainer.

Ready for a check-up?



ECS Imaging is announcing our latest technology to ensure that our customers' Laserfiche systems are functioning with peak performance and efficiency. As the physicians to your Laserfiche system, ECS has developed the capability to take an **X-ray of your Laserfiche system and usage**. This X-ray exam will assist us in determining the systems operating health and diagnose illnesses or dysfunctions it may be experiencing.

For all our valued customers, we are providing this new service at no additional charge. It will be included as part of our Annual Priority Support Plan service automatically. It is our goal to run this X-ray program on an annual basis, just like an annual checkup at the doctor's. Our Team will analyze the results and provide the results in an easy to view report for the management of your organization. Your dedicated Account Manager will review the findings, discuss pro-active measures and results found.

The reports will show items such as the systems age, usage of Laserfiche for the year, comparisons from year to year, and ultimately the value of the Laserfiche system. The intent is to continue to modernize and provide additional info in the future to allow our customers to see what they need to do to make system more effective for the organization. This examination will assist your organization and ours, to determine the health and status of the system.

In many cases, issues that occur in Laserfiche can commonly be tracked down to a problem within the server's hardware, software or network. ECS' X-ray is a new and innovative customized piece of technology which allows the retrieval of valuable data about the server machine to help diagnose and analyze its' health. Pulling information such as CPU processing data, application log errors, startup programs, and so much more, ECS is now able to view the skeleton and muscles of your server machine.

ECS' X-ray is also able to retrieve statistics about Laserfiche and SQL. As the innovators and creators of this technology, ECS Imaging strives to resolve any Laserfiche problems as quickly as possible. This is a pivotal stage in technological advancement to help identify not only current issues within a system but also "potential" areas of concern of a server system. ECS Imaging is taking the lead on prevention as well as problem-solving within the industry.



Please Join Our 2nd Quarter User Group in S. CA Hosted at City of Poway



Thursday, June 3rd 2010 — 8:30am-3:00pm

[View Agenda Online](#)

Reserve Your Spot Today!

Register Today [Online](#), By E-mail: sales@ecsimaging.com, or

Phone: 951-787-8768 x105

[Come Run with the Best at ECS](#)

ECS provides these *complimentary* events to continue to educate our clients on Laserfiche, provide opportunity to connect with other Laserfiche users, and to learn about the latest technologies available to enhance your system.

Madera County User Group Update:

Madera County User Group Meeting was a complete success! Thanks to everyone at Madera County for making the event happen. For those of you who missed us or if you would like to recap on the exciting and innovative material covered, you may find a link below to a video archive of the meeting...

[Click Here](#) for video playback of ECS
N. CA User Group @ Madera County

***We look forward to seeing you at this upcoming
conference!***

June 6th-8th: PHADA Conference in Las Vegas



Thursday, June 3, 10:00
AM PST
[Register](#)

Thursday, June 3, 2:00
PM PST
[Register](#)

Wednesday, June 23,
11:00 AM PST
[Register](#)



[Click Here](#)
To join our weekly
LincDoc Webinar
Wednesdays @ 11am
PST

Laserfiche Webinars

ECM + BPM: HR Onboarding With Laserfiche & MS SharePoint

Looking to develop an ECM strategy? Do you have a current SharePoint initiative? Find out how Laserfiche can provide essential building blocks to developing your ECM strategy and incorporate your SharePoint initiatives.

ECM + BPM =Contract Management

Enterprise content management is an agile framework upon which organizations can build their most important business processes. Within organizations, contract management is a crucial process and critical component of compliance and enterprise risk management. Join us for this Webinar to learn how to manage the contract cycle using an ECM system. ECM+BPM =Contract Management is the latest in a series of Webinars designed to teach the participant how to engage your ECM framework in your delivery of shared services.

SharePoint And ECM: Better Together For Hospital-wide Initiatives

Healthcare organizations are feeling the push to adopt EMRs to facilitate delivery of care and improve clinical outcomes. But truly agile healthcare organizations are also monitoring the health of their own operations. Join us for our next Webinar to take a look at how hospitals are leveraging Laserfiche + SharePoint as part of their overall ECM strategy to facilitate back office tasks.

E-Forms Solution Integrated with Laserfiche

With LincWare you can skip the scan and paper process altogether!

Fillable e-Forms solution is great to process forms such as permit applications, business licenses, enrollment applications and others electronically! E-forms works independently of Laserfiche yet also integrates with it, as well as your other databases. Most companies have a lot of forms and can save time by not having to re-enter data since the information on the forms can be transferred to a database and the images & data to Laserfiche. There are [online demos every Wednesday at 11am](#) or we can setup a custom demo with your forms.

Our Simple Solution:

With this solution we are providing an intuitive front end for processing complex forms, in a digital format to Laserfiche thus enhancing your document lifecycle management. And with the software's ability to automatically complete Laserfiche template field data when the form is filled out, it improves your efficiency and eliminates the need for you to scan paper forms into Laserfiche. The forms are automatically filed into Laserfiche at the time they are filled out.

Each LincDoc version simultaneously populates Laserfiche template fields and 3rd party databases upon the completion of any eForm or document, eliminating redundant entry, scanning and storage steps.

- Dramatically enhance efficiency by producing documents more quickly.
- Ensure homogeneity, correctness, and quality of documents via a fully audited and centralized repository.
- Allow inexperienced end users to create complex documents.

- Reduce errors and company risk by ensuring the right documents, paragraphs and data are included in generated documents.
- Lower manual labor costs and increase productivity by capturing and disseminating the knowledge previously only held by your company's experts.
- Document automation and eForms software can make the information submittal and approval process a breeze.
- Provides organizations with the power to streamline entire departments driven by forms processes.
- Exceptionally rapid ROI and measurable green benefits!

LincDoc's document automation and eForms software can make the information submittal and approval process a breeze.



Tuesday, June 1,
8:00AM PST
[Register](#)

Contex Webinars

Everything You Need For Large Format Scanning

Learn about imaging solutions that enhance your business – from the newest Contex scanning technology and scanning software to the best ways to manage and access your scanned drawings. This webinar provides useful suggestions for every large format industry and any large format document user.

Scan to Communicate with the new Contex XD2490 MFP

Learn how the new XD2490 can improve your day-to-day business practices by:

- o Capturing changes to plans and drawings fast and easily
- o Scan small and large documents – up to A1/D-size
- o Share changes instantly with one-touch email
- o Make quality copies with built-in printer integration
- o User-friendly and lightweight design

Now Contex offers a multi-functional solution for the XD2490 to make scanning with the new 24" XD scanner even easier. Learn how the XD2490 can help you!

Tuesday, June 15,
8:00AM PST
[Register](#)



Empower!

Visit the [Laserfiche Support and User Information Site](#)

Resources available 24 hours a day on this [Support Site](#).

Laserfiche®
Run Smarter™

Version 8 Products

- Client-Server 8.1
- Snapshot
- Email
- Workflow
- Audit Trail
- Records Manager
- Web Access
- Plus
- Toolkit
- Weblink
- Quick Fields
- Agenda Manager & Processor
- Import Agent
- Avante/Rio Named User system



Creating a Field and Tag Search in WebLink's Search

Administrators can take the burden of configuring a search and knowing what search types to configure off their users with the new Search Form Designer in WebLink 8.

For administrators looking to make it easier for WebLink users to find the information they need within Laserfiche repositories, learning to use the new Search Form Designer in WebLink 8 to make targeted, custom searches is the perfect place to start. It enables administrators to create customized searches, taking the burden of configuring a search and knowing what search types to configure off their users. As an administrator, the new Search Form Designer will give you complete control over how users find and view documents in WebLink 8.

For example, you have a repository containing white papers, KB articles and videos covering Web Access, WebLink and Audit Trail. White papers contain a "white paper" resource tag, KB articles contain a "KB article" tag, and videos contain a "video" tag. If the resource covers Web Access, it will have a **Product** field applied to it with the value "Web Access," and the same goes for resources on WebLink and Audit Trail. As an administrator, you can take the burden off your users and configure a field and tag search so they can find a specific type of resource (white paper, KB article or video) on a specific product (Web Access, WebLink or Audit Trail). Users don't even know they are performing a field and tag search. They just select the resource and product from drop-down menus and click Search.

A dialog will appear asking if you want to add the bookmark to your new search form, click **Yes**. In the **New Bookmark** dialog, enter a name for the search that will be linked from the Welcome Page next to **Text**, ensure **Search Form** is selected under **Type**, and select the search form you just created. Click **OK**.

When your users open WebLink, they will see a link on the Welcome Page to the new search. When that link is clicked, the search form you just configured will be displayed.

Tip: Administrators can copy and paste the URL for the customized search and send it directly to users. Users will be able to click on the link, log in, and will be taken directly to the customized search.

Relocating an Activated Laserfiche 8 Product

For administrators looking to move an activated Laserfiche 8 product from one machine to another, it is important to understand how activated products differ from those with legacy licensing. In this week's Tech Tip, we'll walk you through how to successfully relocate your product by helping you better understand this important

distinction.

When you install an activation-based product—such as Avante Server 8.1, Rio License Manager 8, Quick Fields 8, Web Access 8.1, Plus 7 (or any subsequent versions of these products)—you provide an activation key to complete the installation. The activation key communicates with the Laserfiche activation server to generate your product's license, which enables you to authenticate your copy of the product and use it on your machine. This license differs from legacy licenses because it contains a hardware fingerprint that is specific to the machine where the product was activated, so you cannot just manually move the product to another machine.

Understanding the function of this hardware fingerprint is essential to successfully relocating any activated product. Imagine a game of musical chairs where each hardware fingerprint on a license is a chair, and each machine where you want to install your product is a person vying for one of those chairs. Before your product can “sit” on another machine, you have to vacate one of your “chairs” by removing the hardware fingerprint—and the only way to do that is by deactivating your product.

The recommended way to deactivate your product is to simply uninstall it, as the uninstall process will automatically attempt to deactivate the product by connecting to the Laserfiche activation server. It is important to note, however, that if your computer cannot connect to the Laserfiche activation server (for example, if your firewall blocks the connection, or if your Internet connection fails), the deactivation may silently fail.

You can find out more information about whether deactivation failed or succeeded by looking at the LFActivationLog.txt file, which can be located by running a search on your computer. (**Note:** LFActivationLog.txt is a hidden file, so make sure your search includes hidden files.) This file provides a log of what caused your deactivation to fail, and you can use this information to successfully deactivate your product on the next attempt.

If your attempt to automatically deactivate fails or if you suspect your attempt might fail beforehand (i.e., faulty Internet connection, etc.), you can also manually deactivate your product using the Activation Tool utility. For more information on manual deactivation, see Knowledge Base article 1012301, “[HOW TO: Deactivating Laserfiche Products.](#)”

Note: If you uninstall your product and automatic deactivation fails, you will have to reinstall the product before attempting manual deactivation.

Once your product has been successfully deactivated, you will be free to move it to another machine and install it using the standard steps for installation and activation.

Managing Your Document Viewer Panes

When it comes to working with and managing your documents in Laserfiche, understanding the ins and outs of the Document Viewer and its panes is paramount. After all, how can you expect to get the most out of your documents if you can't view them in a way that is practical for you? In this week's Tech Tip, we'll give you some tricks for laying out your Document Viewer panes to help you better manage your documents and the information associated with them.

The key to creating a practical Document Viewer layout is being able to rearrange your panes in a way that meets your needs. For example, you may want to position the Image and the Text panes side by side so you can compare the two, or position the Text and the Metadata panes on top of each other to help you populate field

values with information from the text more easily.

To move a pane, click on its header and drag it. As you drag the pane, blue layout indicators will appear on the Document Viewer, which you can use to preview the pane's new location by hovering over a particular indicator. The indicators pointing to the four edges of the Document Viewer (#1 in the image above) allow you to select the general area where you want to place the pane. To get more specific about its orientation within that area, use the diamond-shaped group of indicators (#2). The blue shadow box (#3), which shifts depending on which indicator you hover over, designates the potential location for the pane. When you're happy with the location, drop the pane to place it.

Another way to customize your pane layout is to use undocked panes. Undocking a pane frees it from the Document Viewer window and allows you to move it anywhere on your screen (as depicted in the image below). To undock a pane, double-click its header. You can also undock a pane by dragging and dropping it in a location that is not marked by a blue shadow box. To dock a pane, double-click its header again.

In addition to positioning panes next to each other, you can also stack panes on top of each other. To stack a pane, drag it toward the pane you want to stack it with. Using the diamond-shaped group of layout indicators, hover over the circular indicator in the middle, and drop the pane. Stacking panes allows you to view only one pane at a time; however, you can toggle between panes by clicking the corresponding tabs at the bottom (highlighted in the image below). To remove a pane from a stack, click and drag its tab, and drop the pane in a new location.

Effective Rights

Best practices in Laserfiche security are to apply security settings to groups rather than individual users, and to use scope and inheritance to set security on entries. These processes make administration simpler and faster than working with each user or entry separately. Effective rights are the cumulative security settings that determine what a particular user can do or see, based on all their group memberships and the security settings in the repository. Viewing the effective rights can be useful for managing security and for troubleshooting—for example, if a user cannot scan into a folder and you suspect rights to be the issue.

Laserfiche administrators can view a user's effective feature rights and privileges in the Laserfiche Administration Console. Feature rights control which actions are available to that user through Laserfiche client applications, such as the ability to print, scan, import, or export. Privileges grant the ability to perform administrative operations and to bypass certain regular security elements. If security settings are managed through groups, those settings will not necessarily be indicated in top of the **Rights** tab of a particular user's profile. However, if you click **View** in the **Effective Rights** section, a dialog box appears that shows the user's effective feature rights and privileges based on their group memberships. If the user belongs to multiple groups, you can click on a specific feature right or privilege to see which group or groups granted it. In addition, you can view effective rights for an item, such as a volume, template, or field, by right-clicking on that item and selecting **All Tasks** and **Security**. In the **View Effective Rights** tab, you can select a Laserfiche trustee or domain account to view that user's effective rights for the item.

In the Laserfiche Client or Web Access, users with the appropriate rights or privileges can see the security settings for a particular entry by right-clicking on a document or folder and selecting **Access Rights**. Entry access rights control the ability to view or modify specific elements in the repository. In the **Entry Access** dialog box, the **Access Rights** tab indicates the rights available on that document or folder by group

and their scope and inheritance through the folder structure in the repository. The **Effective Rights** tab displays the effective rights on that document or folder for a given user or group based on the inheritance shown in the **Access Rights** tab. By default, the effective rights are shown for the Current Connection, which means the user you are logged in as. Click **Choose** to browse (in the Client) or search (in Web Access) other users and view their effective rights.

Whether a user can view these entry access rights is determined by some of the effective rights discussed here. To view the entry access rights for a particular item, a user will need either the **Read Entry Security** access right on that entry (which can be applied through inheritance, including from the repository root), or the powerful **Manage Entry Access** privilege throughout the repository.

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Our Services

- Scanning Services
- Microfiche/Film/Aperture Card Conversions
- E-Forms
- Digital Signatures
- Hosted WebLink
- Custom Programs: Case# Generator, Mug Shot Capture, Six-Pack Creator, Barcode Coversheet Automation
- Custom Integrations: ESRI, Permits Plus, CRW, H.T.E., Navision, Eden, Munis, Oracle, DataTel, PeopleSoft, Digital Recorder Importer
- Turn-key Implementations

Software

Laserfiche®
Run Smarter®

Document Management Software

Integrations With Laserfiche



LincDoc eForms Creation & Automation



Agenda Manager Integration



ESRI Integrations



Free
15-minute webinar

Digital Signatures



Email & Data Encryption



Court Case Management Integration



SharePoint and Office Integrated

Scanning and Capture Technologies



Premier Partner

Product videos click [HERE](#)



Certified Solutions Partner



Certified Solutions & Service Partner



Elite Channel Partner



E-size/Map Scanners



Advanced Capture Solution
ICR & Forms Processing



Check Scanning & Remittance
Processing Integration



Kofax Virtual ReScan Software

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