

Your World Class
Laserfiche Provider



ECS Imaging Newsletter

Helping Companies Go Paper-Less

September 2010

[View Newsletter Online](#)
Volume VIII Issue IX



[News](#)

[Spotlight](#)

[Events](#)

[Webinars](#)

[Tech Tips](#)

[About ECS](#)

[Web Home](#)

[News – LincDoc Special!,
Laserfiche Special, NEW ECS
Tech](#)

[Spotlight – ECS 8th Annual
Conference **LAST CHANCE!**](#)

[About ECS and Product
Demos](#)

[Events – Upcoming Shows](#)

[Tech Tips – New Features](#)

[September Webinars – Best
Practices, Demos, Videos](#)

Your ECS Imaging Account Managers

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

LincDoc Special

Special Limited Time Promo

Get started with automating your forms
today.

*offered exclusively by ECS Imaging, Inc.
A Platinum LincDoc Reseller*

Take Advantage of
5 e-Forms for \$500/month

Promo Includes:

Connection to Auto-file Forms into Laserfiche
Setup of 1 Form (1 page in length)
Installation
Up to \$1,000 credit towards purchase of
Standard or Enterprise Editions
Promo valid through 10/31/10

Tempus Fugit!



Still Sizzling Summer Laserfiche Promotion!

Get **two free users** when upgrading to Avante with ten named users!

There is no limit on the number of free users you can get through this promotion, and it applies to both:

- Avante upgrades and New purchases for new and existing customers.

Customers also receive free Web Access and Audit Trail seats when these modules are included in the system purchase. Please note LSAP must be purchased for all of the free seats.

In addition, any customers with expired LSAP will be given a 75% credit (based on the purchase price of their Classic products) toward an upgrade to Avante. Standard upgrade policies will apply.

This promotion is ends on September 30, 2010 so act now.

Newest Addition to the ECS Imaging Tech-Family – Shelby Chung!



Shelby Chung is our new resident technician here at ECS Imaging. Bringing with him a fresh background from the University of California – Riverside with a B.A. in Computer Science, Shelby is keen to undertaking a practical application of expertise training. Specializing in computer networking and telecommunications, Shelby brings a diversified level of knowledge to the company, adding to the rapidly growing technical support team. In the last month that Shelby has been with ECS, he has shown a tremendous amount of tenacity and positive energy amongst his colleagues in the technical department. “Shelby makes a great fit with the rest of us”, says Israel Sandoval, also a recent addition to the team. Chad Rodriguez, the ECS Technology Manager, when asked about the expansion of his ECS technical staff said, “The strategic additions to the ECS support team have enabled ECS to expand rapidly in its ability to provide the highest level of customer satisfaction to its valued customers. Shelby Chung was hired because of his undeniable drive to learn and his self motivation to provide customers with the best level of support possible. The talents of the new ECS support technicians coupled with the diverse experience of the current ECS technical staff provide a unique and

powerful combination of knowledge, growth, determination, and heightened customer satisfaction.”

Spotlight

[TOP](#)

Location
Embassy Suites
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Airport
Burlingame, CA



Rooms are Sold
Out
At Embassy
Suites!!

Please contact ECS
directly to book your
room at the Red Roof
Inn located adjacently!
\$89 per night, per
room + taxes. We have
reserved rooms at this
rate, but don't delay!

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nights, beds, etc. via E-
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x107

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*This Conference will
provide you with the
latest updates,
training at all levels,
at an
industry networking
environment.*

Last Chance to Register for the Event of the Year!



ECS' 8th Annual Customer Conference **COMPLIMENTARY 2-DAY CONFERENCE!**

***Get Certified in Laserfiche and Let ECS be your Laserfiche Certification Test Tutor!

1. [Pre-register](#) for certification online here:
www.laserfiche.com/cpp
Administrator 1 or Capture 1 Specialist
2. **Take test Friday Sept. 24th** after reviewing material online
and in our prep class offered right before test.

Questions about Certification or Conference?
Contact ECS sales@ecsimaging.com or 951-787-8768 x107

*****Conference Special Guest Speakers from**
Microsoft, City of Vista,
Santa Clara County Office of Education

[Register Today Online](#)

Thursday-Friday, September 23-24th, 2010

Sessions with Training at All Levels

- Customer Case Studies – *From a City and a School*
- Integrated Solutions
- Workflow, Quick Fields, Audit Trail Training
- User & Admin Training, Tips & Tricks
- Weblink 8 Customizations
- How to use the Toolkit
- SharePoint Integration
- Agenda Management

- Individual Training and Consulting
- Microsoft New Concepts
- E-Forms Creation, Digital Signatures, Scanners & **MORE!**

Daily Breakfast, Lunch & Happy Hour included.

Events

[TOP](#)



We look forward to seeing you at our booths!

September 15-17th: League of CA Cities in San Diego
 September 21-22nd: CSDA Show, Booth 30 in Newport Beach
 Thursday and Friday, September 23-24th: [ECS Annual Conference in Burlingame](#)

***Please stop by the ECS Booth and say, Hello!
 Get the latest info.***

Webinars

[TOP](#)

Laserfiche
 Run Smarter

Tuesday,
 September 7,
 10:00 AM PDT
[Register](#)

Prepare for the Coming Compliance Tsunami

In today's constantly shifting regulatory environment, Financial Planners need to prepare themselves, their firms, and their clients to comply with SEC and/or FINRA requirements.

Laserfiche enterprise content management (ECM) helps you mitigate risk and ease compliance headaches with:

1. Automated compliance, check and security logs.
2. Secure, searchable correspondence and document archiving.
3. Faster, easier audits.

Laserfiche and GIS

This session covers integrated document management and GIS solutions. In conjunction with ESRI software, the session explores trends, analytics and practical applications that reveal the value of integrating document management and GIS. By using the existing maps, parcels, roads, properties, and layers we eliminate the tedious task of attaching documents to objects.

- Use existing maps and layers with Laserfiche documents
- Push list of applicable Laserfiche documents to ESRI map users without searching
- Index and retrieve Laserfiche documents from within ESRI map interface
- Select a document and locate it within the ESRI map

Tuesday,
 September 14,
 8:00 AM PDT
[Register](#)

Partner Focus: Building Complete ECM with Laserfiche + SharePoint 2010

Wednesday,
 September 15,
 10:00AM PM PDT
[Register](#)

Learn how the integrated Laserfiche + SharePoint 2010 solution helps make system integrators more competitive in the ECM marketplace.



[Click Here](#)

To sign up for our weekly LincDoc Webinar Wednesdays or Thursdays @ 11am PST



[Register for Webinars](#)

This webinar is designed as an introductory session highlighting the various integration points and added functionality achieved by deploying Laserfiche alongside your clients' SharePoint 2010 installation. Topics to be discussed include: capture, workflow development tools, DoD certified records management and user success story.

E-Forms Solution Integrated with Laserfiche

As a valued customer of ECS Imaging we invite you to a new way of thinking about document management, using an electronic forms product called LincDoc. It is fully integrated with Laserfiche and will solve your problems with cumbersome, paper based forms.

Laserfiche's Three Laws of Agile ECM address the importance of being agile, seeking simple solutions and continually evolving in technology and business. It is these very concepts that have driven the development of a new Laserfiche partner software that is quickly proving itself around the world to be the next step toward complete document control.

LincDoc is cloud-based software that creates eForms for Laserfiche. Straight from your desktop, you can transform Word and PDF files into intelligent business forms that can be completed online and immediately streamed into Laserfiche workflow folders and routed to any project stakeholder.

LincDoc eForms use alerts and advanced field dependency rules that literally "hand-hold" customers and constituents through to completion. LincDoc forms do not ever need to be printed or scanned, rapidly energizing document processes. Once the form is filled out online, it is instantly located in your Laserfiche system! Almost magical!

With multiple editions and options to address multiple size businesses and organizations, LincDoc is scaled and customizable. Please join us Wednesday or Thursday at 11am PST to learn more about this powerful supplement to Laserfiche. [Visit our Web site](#) to sign-up today. If you prefer a custom demonstration, please let us know sales@ecsimaging.com.

Contex E-size Map Scanners

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. We will discuss the full Contex scanning portfolio so that you will learn which scanner best meets your needs.

Tech Tips

[TOP](#)



[Creating a Shortcut to a Specific Document or Folder](#)

[Enhancing Security by Dividing Administrative Privileges](#)

[Customizing Scanner Operator Permissions for a Session in](#)

[Setting Default Document Options in Laserfiche](#)



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 8.1.2
- 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 Shortcut to a Specific Document or Folder

Save time by eliminating the need to search for specific documents or folders

You can make it even easier for you and your users to access documents and/or folders inside a Laserfiche repository by creating shortcuts to them outside of Laserfiche. Shortcuts save you time by eliminating the need to search or browse through the repository to find a specific document or folder.

You can store a shortcut on your Windows desktop for quick access, or send it as an e-mail attachment to another Laserfiche user—who has the Laserfiche Client installed locally—to provide that person with a direct link to that same entry. If the user is configured to log in to Laserfiche using Windows Authentication, he/she will be logged in automatically and will not have to provide credentials each time the shortcut is clicked.

To create a shortcut to a specific document

1. Navigate to the folder where the document is located in the Folder Browser.
2. While holding CTRL + SHIFT, drag the document out of Laserfiche and onto your desktop.
Note: If you do not hold CTRL + SHIFT while dragging, you will export the document.

To create a shortcut to a specific folder

1. Navigate to the folder in the Folder Browser.
2. Drag the folder out of Laserfiche and onto your desktop.

To edit a shortcut's XML to point to a different entry

You can also take an existing document or folder shortcut and change its path by editing the shortcut file, which is in XML format.

Note: Though the shortcut file has a .lfe extension, it is actually a file that uses an XML format that can be edited in a text-editor. Ensure you do not change the extension from .lfe to anything else.

1. Right-click the existing shortcut and open it in a text editing program (e.g., Notepad).
2. Change the entry ID number to point to a different document or folder.

```
<?xml version='1.0' encoding='Unicode'?>
<laserfiche>
<repository name='myRepository'>
<entry id='109578' />
</repository>
</laserfiche>
```
3. When finished, save the XML file.

Note: If you change the document or folder shortcut to point to a different document or folder, you should also rename the shortcut itself so it's not misleading.

[Email this](#)

Enhancing Security by Dividing Administrative Privileges

Certain privileges or combinations of privileges can be very powerful, and you need to be careful about granting them

In Laserfiche, *privileges* are a set of permissions that secure elements of your repository beyond the basic functions of feature rights or the object-specific functions of access rights. While some of these privileges may be appropriate for regular users, many are specifically administrative. For example, the **Manage Entry Access** privilege allows a user to see (although not open) every entry in the repository and set access right security for those entries, and the **Manage Tags** privilege allows the user to set, unset and grant all the tags in the repository. Because these rights are powerful, if your repository uses security to restrict access to the repository, it's a good idea to only grant those privileges to trusted administrative users.

If you have a secure repository, particularly one with a restrictive security policy, you may want to be particularly careful about granting certain privileges. Certain privileges or combinations of privileges can be particularly powerful.

Separating Trustee Privileges

One pair of privileges that is particularly powerful in conjunction with one another is **Manage Trustees** and **Set Trustee Privileges**. The former, **Manage Trustees**, allows the user to create new users and set user passwords. The latter, **Set Trustee Privileges**, allows the user to grant rights to a particular user.

This means that a user with both privileges can create a new user, set the password for that user, grant the user all the rights in the repository and then log in as that user. Essentially, setting both rights on a user allows that user to do anything in the repository. For a small site with only one or two administrators, or a site without a restrictive security policy, this may be acceptable. However, for larger sites, or sites with restrictive security policies, you may want to avoid this situation.

To avoid granting a user all rights in the repository, simply make sure that no single user has both **Manage Trustees** and **Set Trustee Privileges**. By splitting this right between multiple users, you can ensure that there are checks and balances on your security policy.

Granting Rights to Individual Templates and Fields

In many cases, you may want or need to have non-administrative users manage certain templates and fields. For instance, you might want the Accounting Manager to be able to make changes to the Accounting template and the fields in that template, since he knows more about the template and fields than the general repository administrators.

Your first instinct may be to grant the Accounting Manager the **Manage Templates and Fields** privilege. This privilege would allow the Accounting Manager to manage the Accounting template and its fields... but it would also allow him to manage all the templates and fields for other departments as well.

Instead, you can use template and field access rights to grant the Accounting Manager the right to handle the Accounting department's templates and fields. This allows you to grant the general **Manage Templates and Fields** privilege only to administrators who should be able to handle all the repository's templates and fields. (For specific instructions on template and field access rights, see the Laserfiche Administration Console help files, in the "Security" chapter.)

Note: In Laserfiche 7, there is only one privilege for all metadata items: **Manage Metadata**. Because this does not allow for distribution of various metadata management rights, if distributing metadata security is important to you, you may want to consider upgrading to Laserfiche 8.

Managing Entry Access Rights

The **Manage Entry Access Rights** privilege is a very powerful privilege: it allows the user to browse any entry in the repository, manage documents in the recycle bin and set entry access rights for every entry in the repository. While this is an appropriate right for high-level administrators who are in charge of managing security for the entire repository, it is not appropriate for many other users, even power users.

However, you may want to allow power users to manage entry access security for certain folders. For example, you may want the Sales Manager to be able to set entry access rights for documents in the Sales folder—without giving her access to documents in other departments' folders.

It was for this situation that the **Write Entry Security** entry access right was created. **Write Entry Security** allows a user to manage entry access rights, but only for the entries on which that user has been granted that right. This means that you can grant **Write Entry Security** to your Sales Manager on the Sales folder, with the scope **This entry, subfolders and documents**, and thus allow the Manager to configure security for her folder and subfolders, but not for other folders in the repository.

Customizing Scanner Operator Permissions for a Session in Quick Fields 8

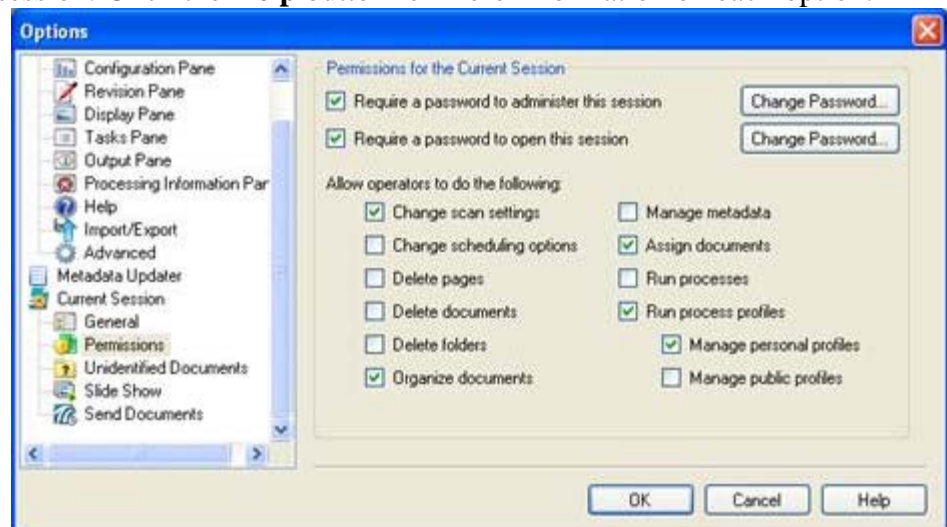
Specify the particular tasks you want scanner operators to be able to perform

You can create a scanner operator view of Quick Fields that includes scanning and revision options but does not show the session configuration.

In Quick Fields 8, you can also specify the particular tasks you want scanner operators to be able to perform. For example, you can determine whether they have the ability to delete documents or change scheduling options.

To set operator mode permissions for a particular session:

1. From the **Tools** menu, select **Options, Current Session, and Permissions**.
2. Require a password to administer the session, so that unless that password is entered, the session will open in operator mode. If you like, require a password to open it in operator mode as well.
3. Specify the settings you want scanner operators to be able to perform for this session. Click the **Help** button for more information on each option.

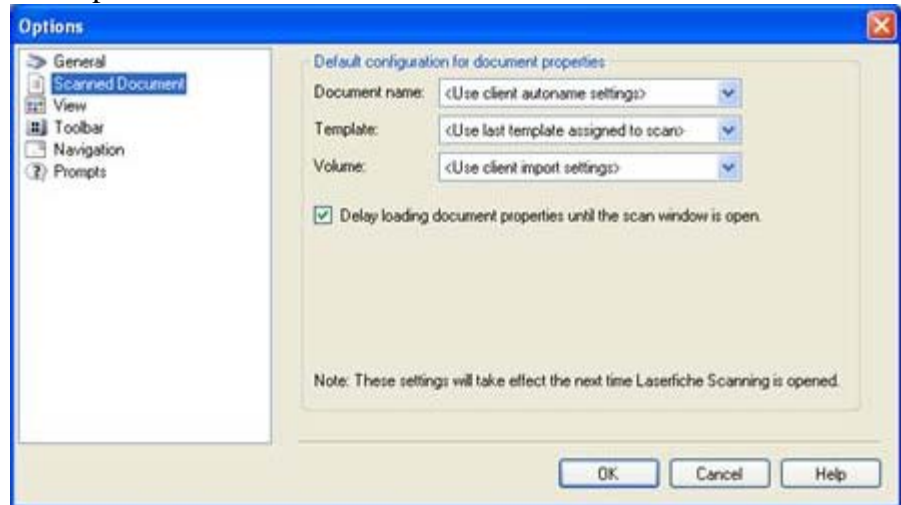


For similar ideas, see the [Customizing the Quick Fields 8 Interface white paper](#).

Customize defaults for how the name, template and volume for a newly scanned document will be determined

In Laserfiche 8 Scanning, you can customize defaults for how the name, template and volume for a newly scanned document will be determined. In general, you have the choice of using the Client settings, the settings for the folder being scanned into, the item most recently used in Scanning or a specific item. These options are the same in both Basic and Standard Scanning.

Note: You can modify these values for individual documents during the configuration and/or revision process.



To set the default document properties in Laserfiche Scanning:

1. From the menu bar, select **File** and **Options**.
2. In the **Options** dialog box, select the **Scanned Document** node.
3. Select settings.

Document name

This option defines a default name for scanned documents.

- **Use client autoname settings.**
- **Use last scanned document name.**
- **Custom:** Assign a custom default name.

Template

This option defines a default template for scanned documents.

- **Use client import settings.**
- **Use folder last scanned into.**
- **Use last template assigned to scan.**
- **No template assigned.**
- **Assign a custom template to scanned documents.**

Volume

This option defines a default volume for scanned documents.

- **Use client import settings.**
- **Use folder default volume.**
- **Use last volume scanned to.**
- **Assign a custom volume.**

Delay Loading Document Properties Until the Scan Window is Open

This dialog box also allows you to delay loading document properties until the scan window is open. This allows the initial opening of Laserfiche Scanning to proceed faster, since some elements will load later.

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Kofax Virtual ReScan Software