

Laserfiche Session Series

Group 2 = Training for End User

Day 1

1.0 Introduction to Laserfiche

1.1. Using the Folder Browser & Designing a Folder Structure

1.2. Navigating the Folder Browser

1.2.1. Navigating the Folder Pane

1.2.2. Navigating the Contents Pane

1.2.3. Tips for Creating an Easy-to-Use Folder Structure

1.3. Managing Folders and Documents

1.3.1. Creating Folders and Documents

1.3.2. Creating Shortcuts

1.3.3. Moving Folders and Documents

1.4. Customizing the Folder Browser

1.4.1. Managing Prompts

1.4.2. Customizing the Toolbar

Question and Answers Session

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Day 2

2. Viewing and Working With Documents

2.1. Types of Documents

2.2. The Document Viewer

2.2.1. Image Pane

2.2.2. Text Pane

2.2.3. Metadata Pane

2.2.4. Thumbnail Pane

2.3. Customizing the Document Viewer

2.3.1. Customizing the Document Viewer Toolbar

2.4. Annotations

2.4.1. Stamps

2.4.2. Sticky Notes

2.4.3. Highlights

2.4.4. Redactions

2.4.5. Linking Text and Image Annotations

2.5. Electronic Documents

2.5.1. Opening Electronic Documents

2.5.2. Modifying Electronic Documents

2.5.3. Electronic Document Check In and Check Out

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Day 3

3. Document Metadata

3.1. Templates

3.1.1. What are Templates?

3.1.2. Designing Templates

3.1.3. Creating templates

3.1.4. Filling Template Fields

3.2. Tags

3.2.1. Informational Tags

3.2.2. Security Tags

3.2.3. Viewing Tags

3.2.4. Creating and Applying Tags

3.3. Links

3.3.1. Viewing Document Links

3.3.2. Linking and Unlinking Documents

3.4. Versions

3.4.1. Why Use Versions?

3.4.2. Versions and Version Groups

3.4.3. Creating New Versions

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Day 4

4. Searching

4.1. Wildcards

4.2. Basic Searches

4.2.1. Basic Search Types

4.3. Combining Searches

4.4. Advanced Searching

4.5. Search Options

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Day 5

5. Importing Documents

5.1. Import Methods

5.1.1. Importing Images and Electronic Documents

5.1.2. Importing Briefcases

5.1.3. Dragging and Dropping From Windows

5.1.4. "Send To" from Windows and Office Applications

5.2. Configuring Document Import

5.2.1. Configuring Default Behavior for New Documents

5.2.2. Outlook Import Options 63

5.2.3. Import Conversion List Options

5.2.4. Autonaming

5.2.5. Best Practices for Importing

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Day 6

6. Exporting and Printing Documents

6.1. Export Methods

6.1.1. Text, Images and Electronic Documents

6.1.2. Briefcases

6.1.3. E-Mailing Documents

6.2. Export Options

6.3. Copying and Pasting

6.4. Printing

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Day 7

7. Snapshot

7.1. When to Use Snapshot

7.2. Snapshot Configuration

7.2.1. General

7.2.2. Destination

7.2.3. Template

7.2.4. Tags

7.2.5. Document Handling

7.2.6. Advanced

7.3. Snapshot Printer Properties

7.4. Using Snapshot in the Client

7.5. Using Snapshot in Other Applications

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Day 8

8. Scanning

8.1. Getting Started with Laserfiche Scanning

8.2. How Does It Work?

8.3. Choosing a Scanning Mode

8.4. Scan Sources

8.5. Basic Scanning

8.5.1. Basic Scanning Quick Start

8.5.2. Default Properties

8.5.3. Options

8.6. Standard Scanning

8.6.1. Standard Scanning Quick Start

8.6.2. Default Properties

8.6.3. Image Processing

8.7. Other Options

8.7.1. Scanning into an Existing Document

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Day 9

Part A

9.1 Passwords and Authentication

9.2 Tokens

9.3` Keyboard Shortcuts

Part B

9.4 Integration and automation

9.5 Google Sheets and Laserfiche integration + automation

9.6 Laserfiche and Google Drive integration and automation

Recaps if requested by the learners

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Day 10 Laserfiche Solution Marketplace for Users, 10 examples

10.1 Accounting

10.2 Finance

10.3 Records Management

10.4 Document Capture

10.6 Operations

10.7 Facility Management

10.8 ERP (Enterprise Resource Planning)

10.9 CRM (Customer Relationship Management)

10.10 Human Resources

Recaps if requested by the learners

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