

11/2/2011

Reform.12

**Laserfiche for
MOST**

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About the MOST Laserfiche Plug-in

The Laserfiche plug-in acts as a bridge between MOST and Laserfiche. It allows you to archive documents processed by MOST to Laserfiche Repositories where your collection of documents can be shared.

MOST along with Reform Enterprise/PDC maximizes the integration with Laserfiche by enabling automatic delivery of document information from any operating system, application or device. Whether a document is being printed scanned in using an MFP or copier with MOST, or using MOST Desktop, Reform will capture the process, extract the text and intelligently archive it to Laserfiche. With Reform's alternative input options, more of your valuable information can be effortlessly accessed and easily shared company-wide through Laserfiche. Reform can control directory locations as well as custom index information to simplify document retrieval. Fast and easy access to important information is an extremely vital resource, and Reform's integration capabilities to Laserfiche let you obtain the most comprehensive document information archive to improve the workflow of your business operations.

System Requirements

- Reform 12 Enterprise or Reform 12 PDC
- MOST Plugin
- Laserfiche Plugin
- MOST Laserfiche Plugin
- For Evaluation and Demonstration: Windows XP, Windows 2003 Server, Windows Vista, Windows 7 or Windows 2008 Server (64 Bit Operating Systems are Supported)
- For Production Systems: Windows 2003 Server or Windows 2008 Server (64 Bit Operating Systems are Supported)
- Microsoft SQL Server (SQL Server Express will be automatically installed by the Laserfiche installer if it is not present on the current system)
- Microsoft .NET Framework 2.0 (installed automatically if not present on the current system)
- Laserfiche Server

All required Reform software downloads can be found at www.fabsoft.com >> Downloads section.

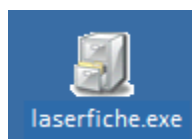
Hardware Requirements

- Production System Recommendation (These suggestions are only estimations. High load environments may require multiple servers, or additional hardware.)
 1. Pentium 4 Processor
 2. 4 GB RAM
 3. HDD Space 100 GB (Redundancy recommended)
 4. Battery Backup (UPS)
 5. Dedicated server, no other software products except for virus and security programs.
- Minimum System Requirements for demonstration purposes only
 1. Pentium 4 Processor
 2. 2 GB RAM
 3. HDD Space 30 GB

Hardware specifications depend greatly on the workload and throughput that is required. Higher end processors and greater amounts of memory will increase the amount of information and data that Reform can process thus improving overall system throughput. For load balancing or failover, multiple servers can also be used. (Note: A license for Reform and each plug-in is required for each server running the software.) Before obtaining the server that you plan on utilizing for Reform, please check the plug-ins' user manuals for System Requirements as well as they may require additional hardware. For production systems, we also recommend redundant hard drives utilizing the mirroring features of RAID (Redundant Array of Independent Disks) to minimize data loss and expedite system recovery in the event of a hardware failure. Battery backups are also suggested to maintain system uptime and reliability in case of power failures.

Installation

To install the Laserfiche Plug-in components, download and run the installer.



Step through the prompts and accept the User License Agreement. The installation will begin. Allow the installation to complete and then read on to the next section to learn how to set up the MOST_Laserfiche integration.

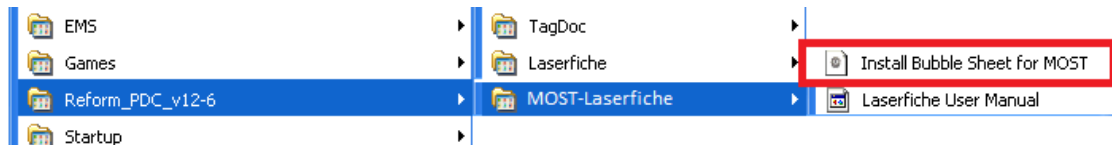
The default installation directory for Reform 12 and its plugins is **C:\Program Files\Reform...**. If you have changed the path during the Reform installation routine,

or if you are using a 64 bit operating system, please refer to the appropriate path instead of the default one referenced throughout this documentation.

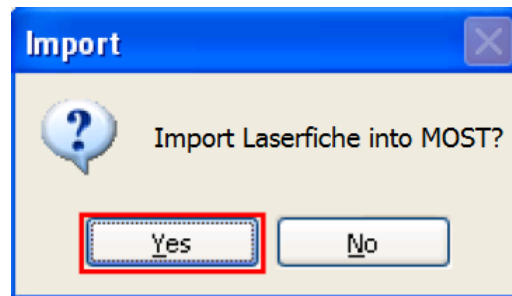
Importing MOST Screen

Please refer to the MOST manual for more information regarding MOST terminology, MOST Setup, and Connection Test.

To import MOST screens for Laserfiche **Go to Start > Programs > Reform... > MOST-Laserfiche > Install MOST Screens**



If not already open, MOST designer will appear. You will be prompted if you want to import Laserfiche into MOST. Click **Yes**. If asked if you want to overwrite files, click **Yes**.

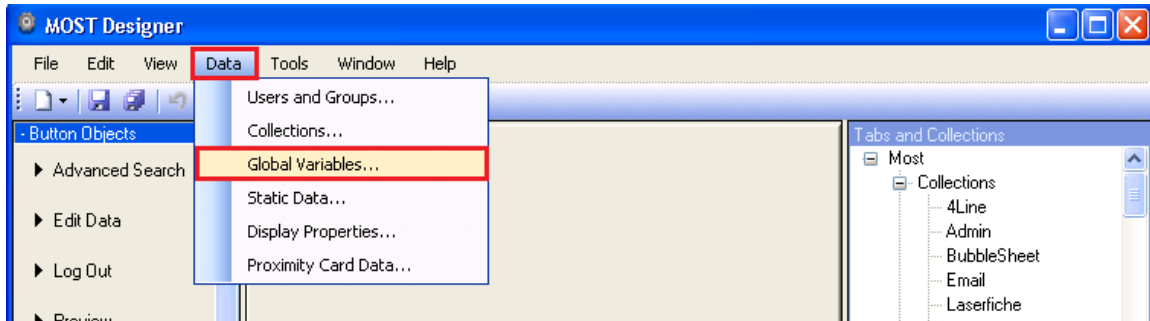


You can leave the MOST Designer open as it will be used in the following section.

Setting Global Variables

We need to setup the communication between MOST and Laserfiche. To do so, we have to configure certain parameters in MOST's Global variables screen. If the MOST Designer is not already open, go to **Start>Programs>Reform...>MOST>Designer**.

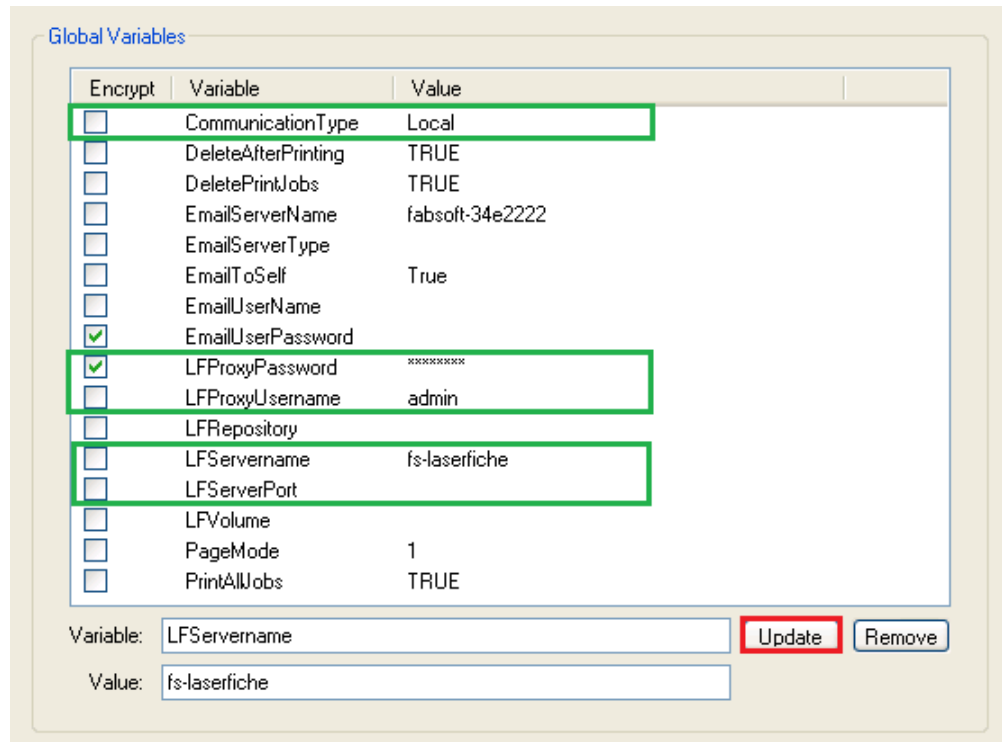
Go to **Data>Global Variables** on the menu bar.




These are the Global Variables required for MOST to access your Laserfiche server. For the variables LFServername, LFServerPort, LFProxyUsername and LFProxyPassword you will have to enter valid information to connect to your Laserfiche server. After entering each Variable Name be sure to click **Update**.

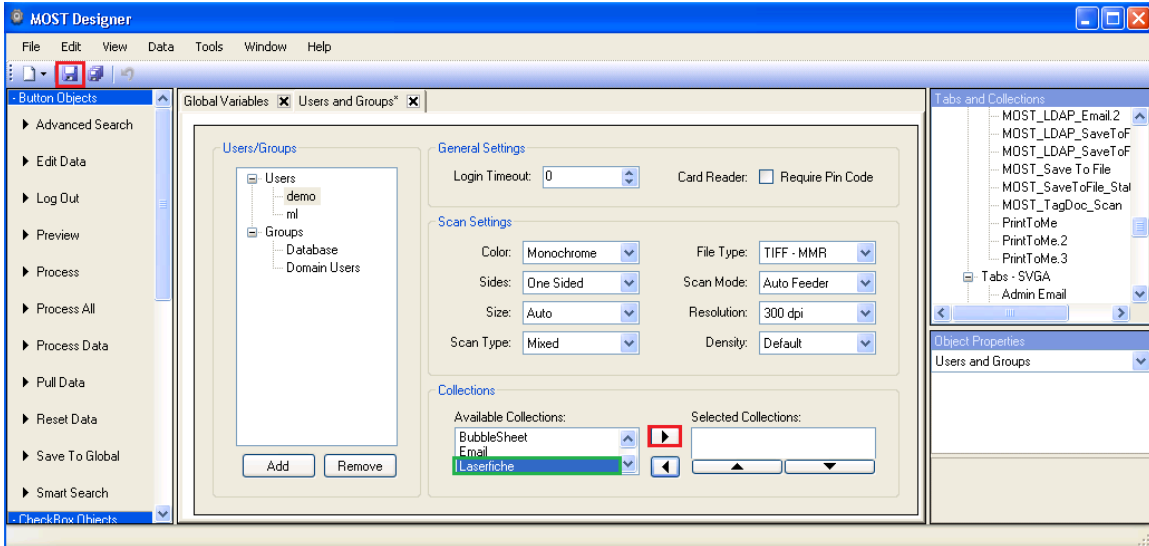
1. Variable Name = **CommunicationType** Value = **Local**
2. Variable Name = **LFProxyPassword** Value = "Your Laserfiche account password"
3. Variable Name = **LFProxyUsername** Value = "Your Laserfiche account username"
4. Variable Name = **LFServername** Value = "Your Laserfiche server name"
5. Variable Name = **LFServerPort** Value = "Your Laserfiche server port"


***CommunicationType specifies whether or not the MFP is reachable by IP from the MOST server. If the MFP is reachable by IP from the MOST server, the CommunicationType should be set to "Local". If the MFP is on a remote (wide area) Network, the CommunicationType should be set to "Remote". (Remote printing may be required in the MOST Manager)**



Assigning Collections to Users

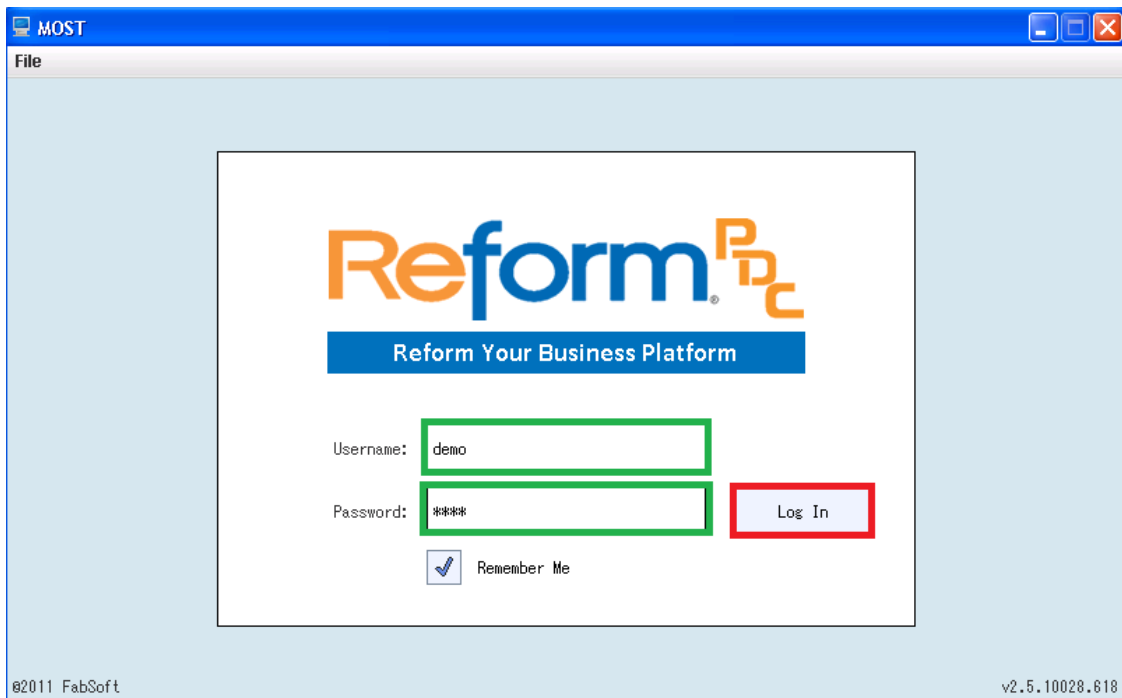
1. Open your MOST Designer if not already opened (**Start>Programs>Reform...>MOST>Designer**).
2. On the MOST Designer tool bar, click on **Data > Users and Groups**
3. Select the **demo** user from the User/Groups list. We will be adding the Laserfiche collection for this user. The same process can be user for any user or group.
4. Select **Laserfiche** from the Available Collections and click the  to add the Laserfiche collection.



5. **File>Save** or use the small save icon  to save your changes.

MOST Laserfiche Tutorial

1. Login to MOST at an MFP or use MOST Desktop (**Start > Programs > Reform...>MOST>Misc>MOST Desktop**) using the demo account. Username is **demo**, password is **demo**.



2. You will now be logged into MOST, click the Laserfiche tab, you should see a screen similar to below.

*In step two the Laserfiche servername should be there. If you do not see, you may have entered incorrect information in the values for the setting global variables section of this manual.

The screenshot shows a web application window titled "MOST" with a "File" menu. The main content area is titled "Laserfiche" and contains four steps for configuration:

- Step 1: Enter a Filename**: A text input field.
- Step 2: Select a Repository and specific folder you would like to upload to**: A list box containing "+ FS-Laserfiche8.fabsoft.net".
- Step 3: Select a Template**: A dropdown menu.
- Step 4: Enter value for fields asterik(*) before name of field means it's required to be entered**: A table with multiple rows and columns for field configuration.

At the bottom of the interface are two buttons: "Log Out" and "Scan".

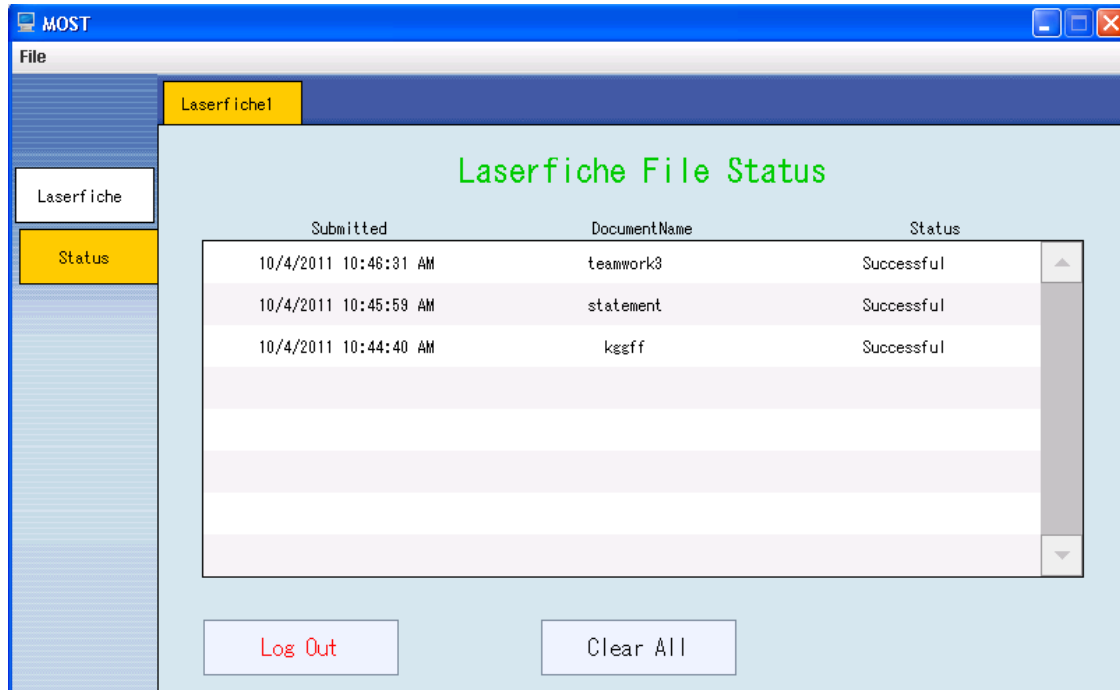
3. Click the box below Step 1 and enter the filename you would like to name the document you are about to scan.
4. Under step 2, select a repository. Click the server, you should then see a list of repository folders, select the one you would like to upload the scan to.
5. Under step 3, select the template you would like to upload the scan to.
6. Under step 4, you should now see a list of fields. The fields with a (*) are mandatory, you must enter a value. All other fields you may or may not enter values. To enter a specific field click the corresponding box outlined in red for the field you would like to enter. You will see a popup, enter the value and click **OK**.

The screenshot shows the MOST software interface for Laserfiche. The window title is "MOST". The main area is titled "File" and contains a "Laserfiche" tab. The interface is divided into four steps:

- Step 1: Enter a Filename (text box with "LFTest123")
- Step 2: Select a Repository and specific folder you would like to upload to (tree view showing folders like "Reform", "Ad Hoc", "Invoices", "Personal", "Purchase Orders", "2010", "Feb")
- Step 3: Select a Template (dropdown menu with "General")
- Step 4: Enter value for fields asterik(*) before name of field means it's required to be entered (table with fields: Document, Type, Category, Addressee, * Date, Abstract, Subject, Author)

A red box highlights the input fields for Step 4. At the bottom, there are "Log Out" and "Scan" buttons.

7. Select **Scan**. If using MOST Desktop, there is a .tif file in the **Reform..>Misc** folder you can use. If using MFP, you can scan any page/s.
8. You can then check the status of Scan by selecting the **Status** tab. This screen will show you the status of all the scans that you have made. Clicking the **Clear All** we clear all of your scans. You can also logon to your Laserfiche account and confirm that your scanned documents made it to the correct folders in Laserfiche.



Maintenance

There are certain directories and SQL tables that need to be monitored for growth along with the Laserfiche plugin for Reform 12. As a system processes more and more jobs, the size of these directories and SQL tables can grow very quickly. Overall system performance can be affected by the large amounts of space that the files may take up. Also, there exists a 4GB database limit if using the Microsoft SQL Server Express 2005 supplied with this installation. Obsolete files/database entries should be deleted according to your needs and file retention specifications. It is recommended to monitor the following directories and SQL tables for growth:

Directories:

C:\Program Files\Reform...\Backups
C:\Program Files\Reform...\Spooler\ImageQueue
C:\Program Files\Reform...\Plugins\Laserfiche\Attachments

SQL Tables:

Reform_Laserfiche_Trans

Troubleshooting

Q: Nothing is happening after the scan is processed. How can I determine the cause of an issue?

A: Check the Event Log for errors related to Reform or the Laserfiche service. The Event Log can be access by going to Control Panel > Administrative Tools > Event Log. This will usually give you a good idea about why the Laserfiche plugin might be failing.

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