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Reform.12

Laserfiche

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About the Laserfiche Plug-in

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

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 from the host, scanned in using an MFP or copier, or generated by a user from an application, 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
- 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)

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

Hardware Requirements

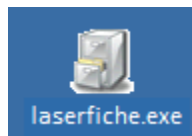
- Production System Recommendation (These suggestions are only estimations. High load environments may require multiple servers, or additional hardware.)
 1. Pentium 4 Processor

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 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.

Plugin Registration and Licensing

When evaluating Reform 12, the plugins will also be in an evaluation mode for that period of time. Once Reform has been purchased and licensed, the required plugins must also be licensed in order to continue functioning correctly.

Please see the “Reform 12 Licensing and Registration” section of the Reform 12 User Manual for more information on how to license Reform 12 Plug-ins. After the license is entered, the Reform Spooler will need to be restarted to refresh the licenses. More information regarding the Reform Spooler Service can be found in the Reform 12 User Manual.

Sending Your First Document to Laserfiche

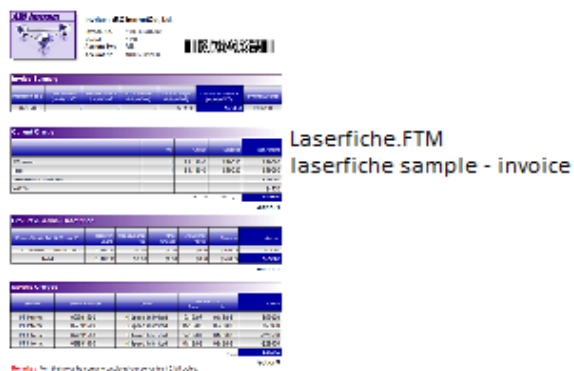
After installing the Laserfiche plug-in, it is important to confirm that the Laserfiche Service is running. This can be accomplished by restarting the PC or by manually starting the service. For more information on starting it manually, please see the **Starting Laserfiche Service** section at the end of this manual.

Very Important:

You will need to have a Laserfiche server on the network you are connected to with a valid username and password.

First, the Reform Designer must be started. To open it, go to **Start>Programs>Reform...>Designer**.

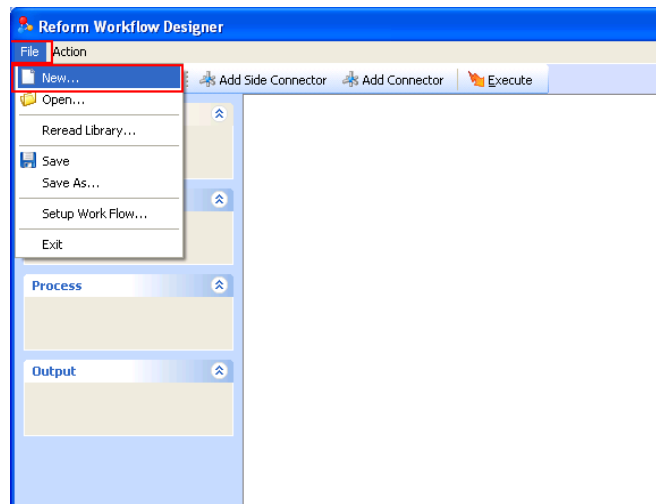
1. For the example, we will be creating a new form with an existing template. Go to **File > New > New**. Select the **LASERFICHE.FTM** and click **OK**.



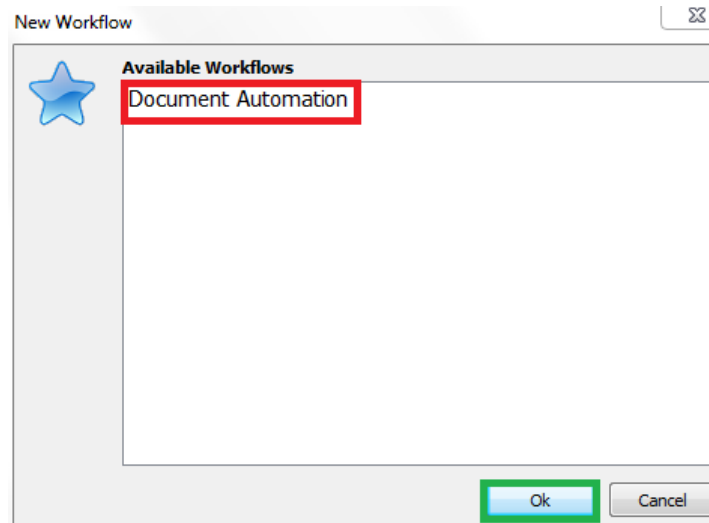
2. When it asks if you would like to open a text file for designing, select **No**.
3. Next, go to **File>Save** to save your form. Name it **LaserficheInvoice.FOM**
4. You can now close the Reform Designer since we have our form which we will be using alongside the Workflow Designer to route the document.

*Now that we have our form, we can begin to create the desired Laserfiche workflow using the Workflow Designer. First, the Workflow Designer must be started.

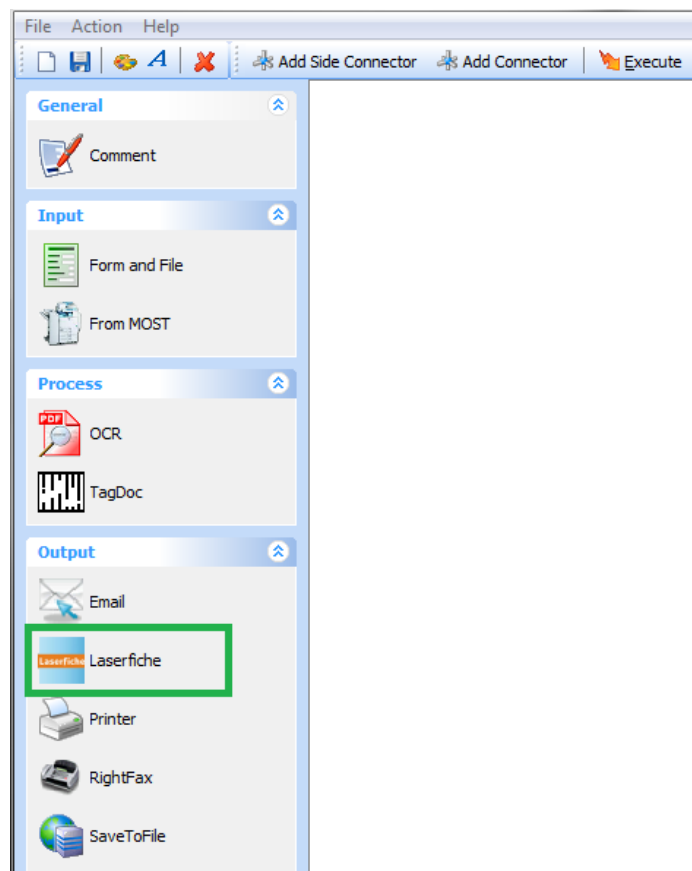
5. To open it, go to **Start>Programs>Reform...>Workflow Designer**.
6. Once open, we must go to **File > New...**



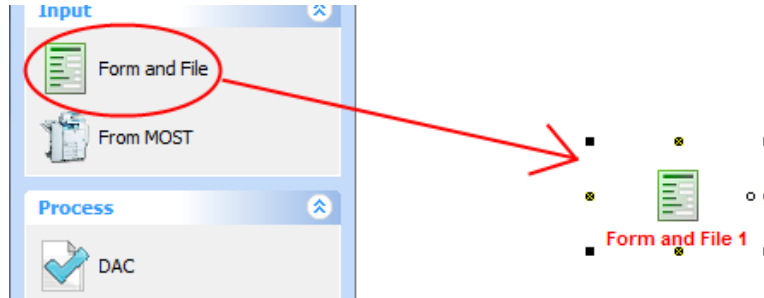
7. Select **“Document Automation”** and click **Ok**.



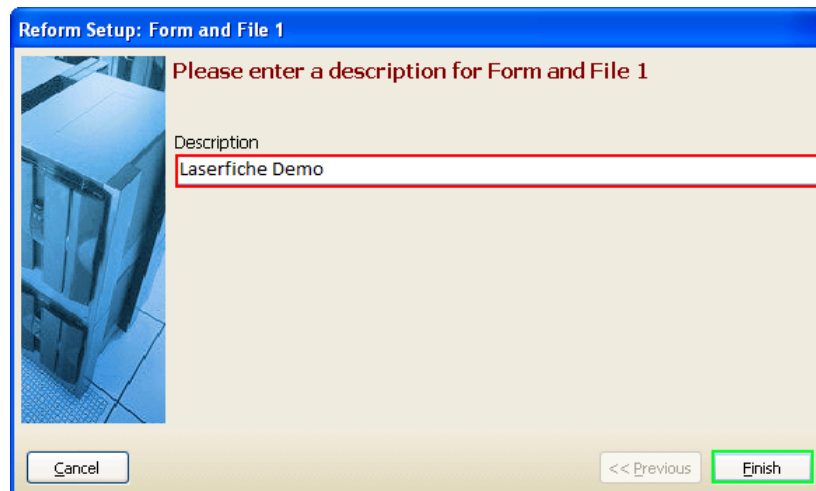
8. You will now notice that your Inputs, Processes and Outputs have been populated by the various plugins you have installed (Laserfiche being one of the Outputs)



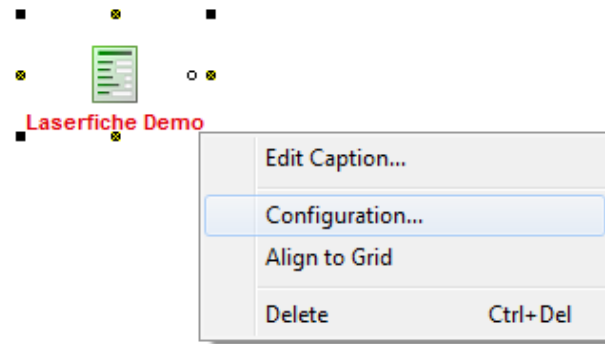
9. Once open, we can start adding the necessary components to the workflow. First, drag and drop a **Form and File** object onto the workflow by clicking and holding your mouse on **Form and File** and then moving your mouse over to the workflow and releasing the mouse button.



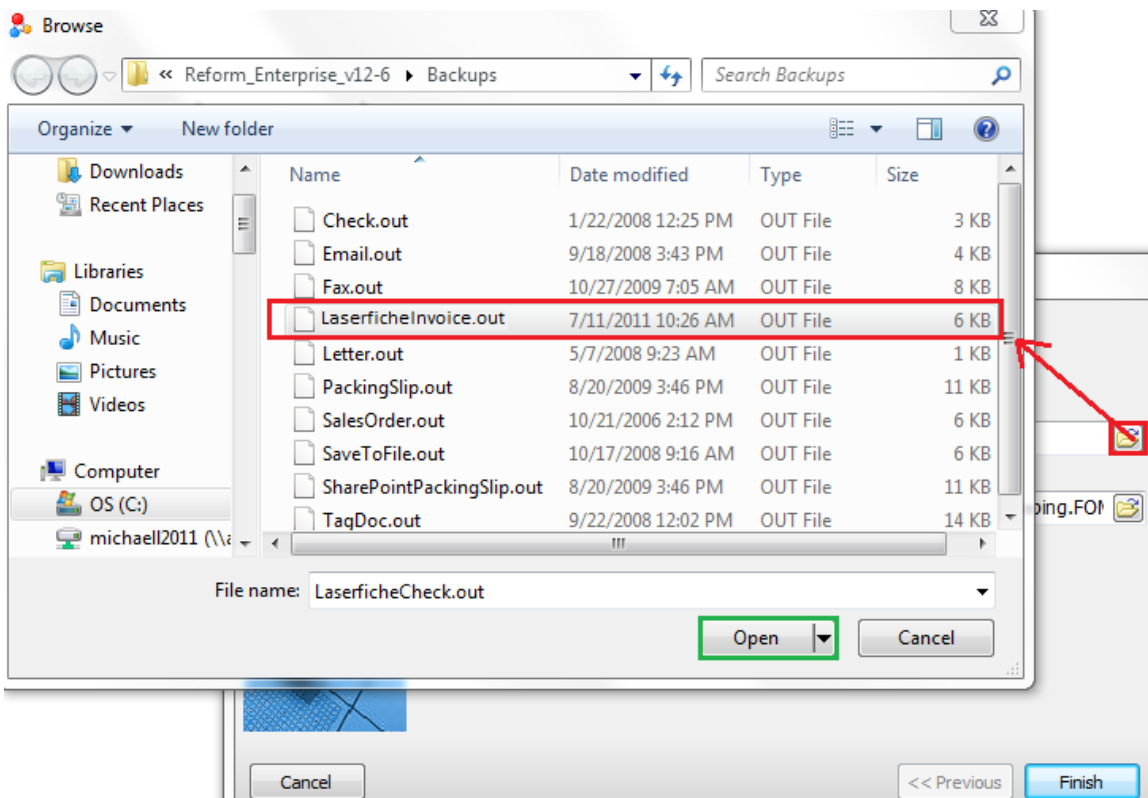
*You will be prompted with the following dialog:



10. Type **“Laserfiche Demo”** and click **Finish**.
11. Now we are ready to configure the **“Laserfiche Demo”** form and input file. To do so, right click on the newly added object and select **“Configuration...”** or simply **double-click** it.

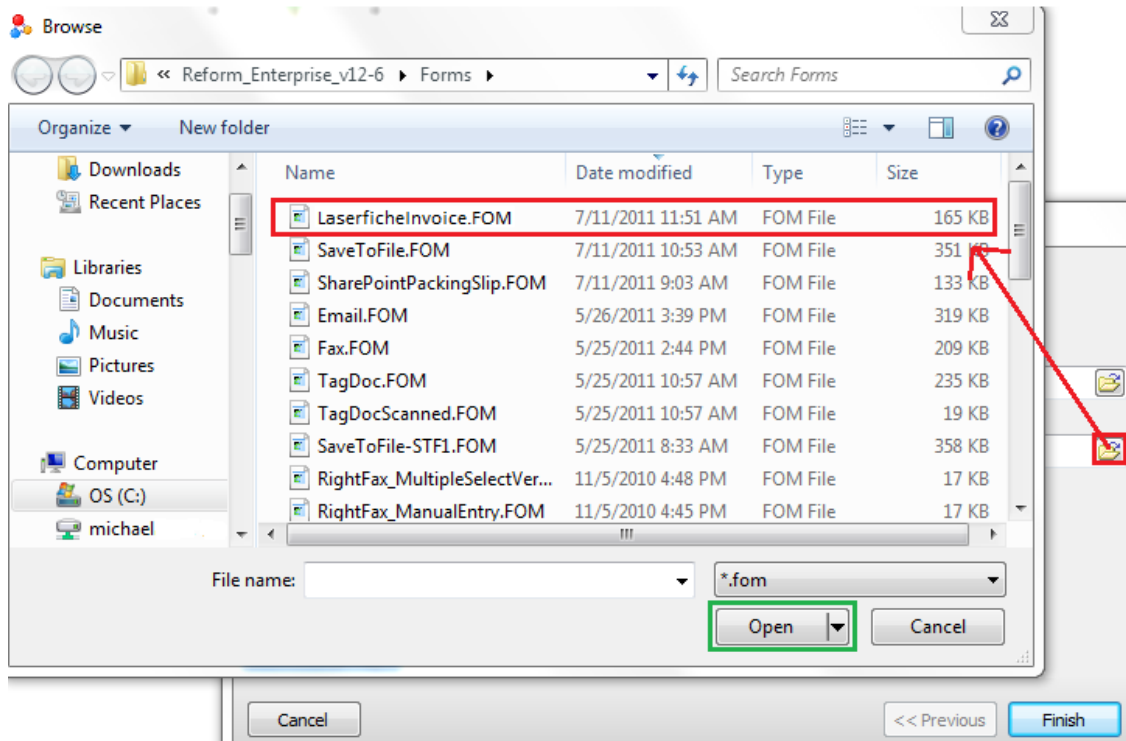


12. You are now presented with the Input Setup window. First, we want to select the TextFile or data stream that our form will be using. To do so, you can simply begin typing in the box, or you can browse to find it. We want to select the **LaserficheInvoice.out** file. Click the small folder icon to bring up a window which will let us choose that file. Select the file and click **Open**.

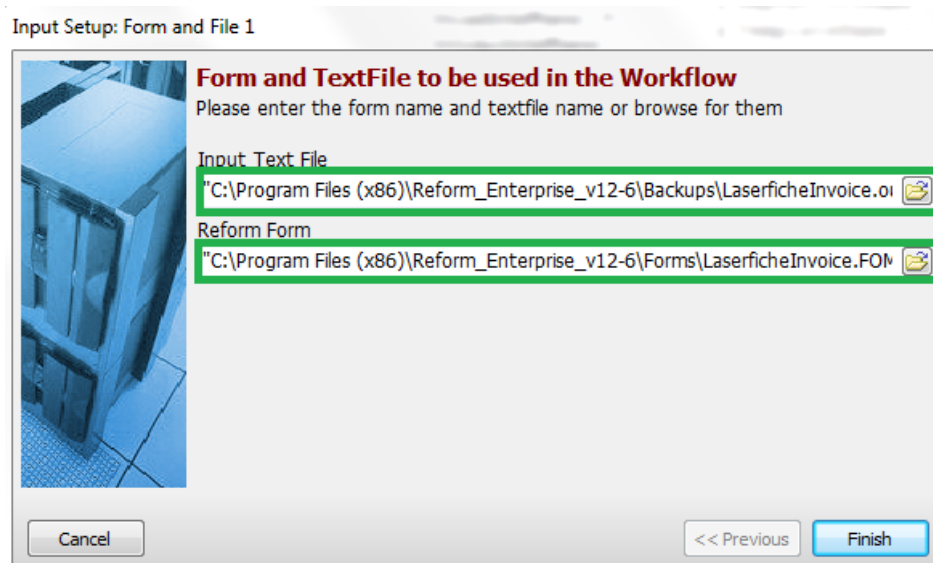


13. After choosing the text file, you are taken back to the Input Setup page so that you can now select a form. Click the small folder icon to bring up a window which will

let us choose the desired **LaserficheInvoice.FOM** form file. Select the FOM file and click **Open**.



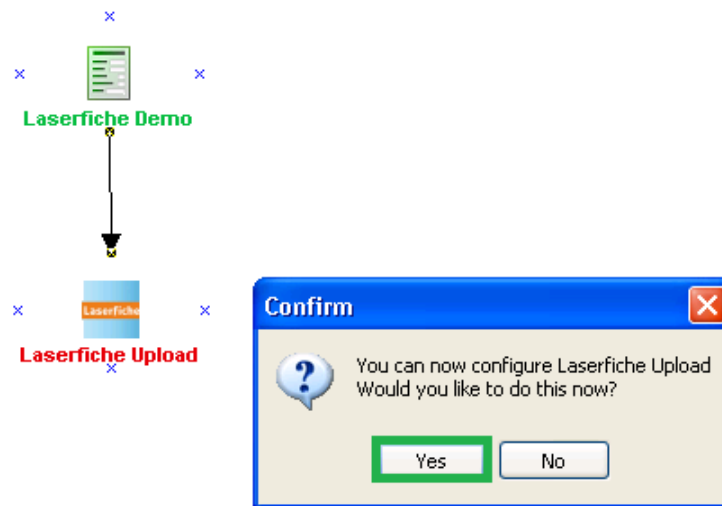
14. Now that you have both your Input Text File and Reform Form selected, the setup of Form and File is complete. You can quickly double check that the correct files are selected and then click **Finish**.



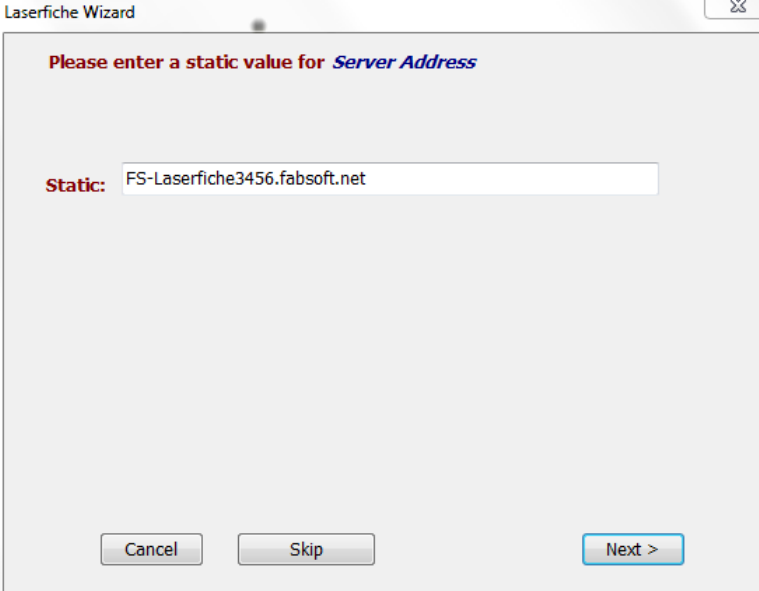
15. You will also be prompted to add a page-break field to the forms. At this point, we want to select **No**.
16. To finish the Laserfiche workflow, we want to add a **Laserfiche** Output. We use the same drag and drop procedure as with the “**Form and File**” (see step 9). Take your mouse and drag the “**Laserfiche**” object from under Output onto the workflow somewhere below your Input. You will be prompted with a dialog box, type “**Laserfiche Upload**” and click **Finish**.
17. Once you click Finish, you are taken back to your workflow. Your **Laserfiche** will have a **Red** Caption because it is not yet configured. To configure **Laserfiche**, you must first connect the Form and File object titled “**Laserfiche Demo**”. To do so, first select the “**Add Connector**” button from the menu bar. Next, drag your mouse from the small “**x**” underneath “**Laserfiche Demo**” to the small “**x**” above “**Laserfiche Upload**” as pictured below. When the connection is complete, the connector will turn black (if red, connection has not been made correctly, try again) and the “**Laserfiche Demo**” caption will turn **green**.



18. Now we are ready to configure the “**Laserfiche Upload**” output. Click **Yes**.



19. Please enter your Laserfiche Server Address and then click **Next**. You can also hit **Skip** and it will search your network for any Laserfiche server. A sample server address is filled in below.



Laserfiche Wizard

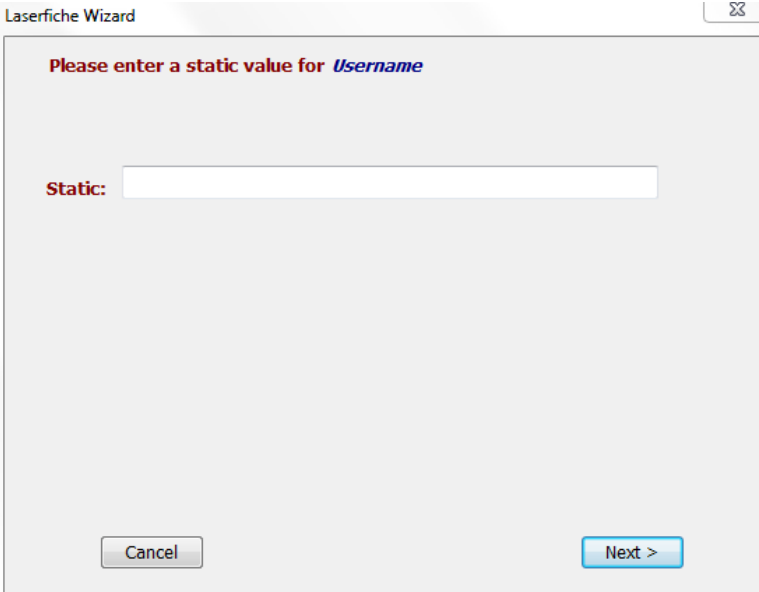
Please enter a static value for *Server Address*

Static:

Cancel Skip Next >

This screenshot shows a dialog box titled "Laserfiche Wizard". The main instruction is "Please enter a static value for *Server Address*". Below this, there is a label "Static:" followed by a text input field containing the value "FS-Laserfiche3456.fabsoft.net". At the bottom of the dialog, there are three buttons: "Cancel", "Skip", and "Next >".

20. Enter a valid Username. Click **Next**.



Laserfiche Wizard

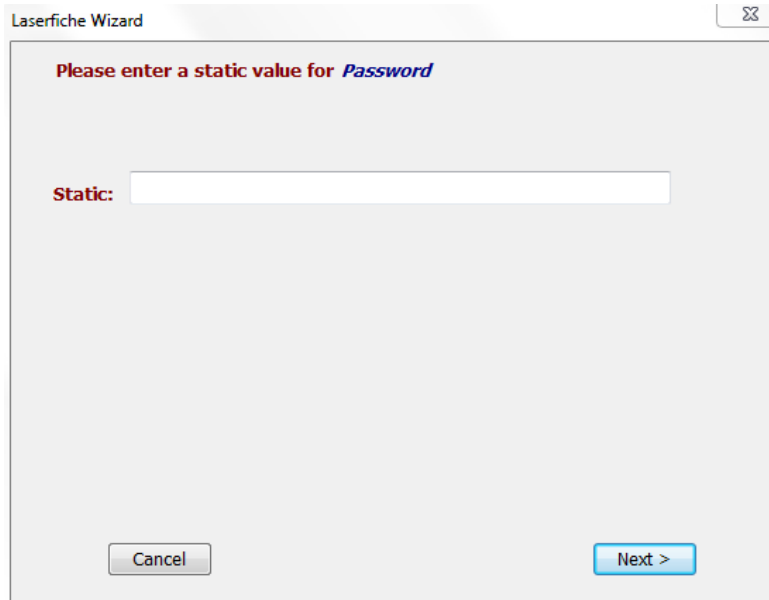
Please enter a static value for *Username*

Static:

Cancel Next >

This screenshot shows a dialog box titled "Laserfiche Wizard". The main instruction is "Please enter a static value for *Username*". Below this, there is a label "Static:" followed by an empty text input field. At the bottom of the dialog, there are two buttons: "Cancel" and "Next >".

21. Enter a valid password and click on **Next**.



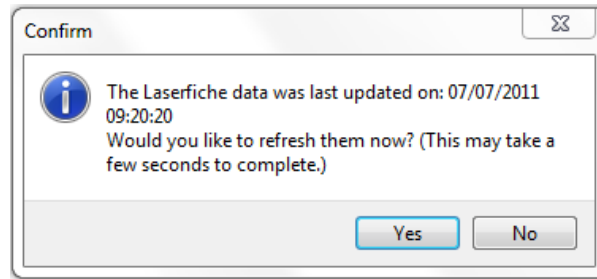
The screenshot shows a dialog box titled "Laserfiche Wizard". The main text reads "Please enter a static value for *Password*". Below this text is a label "Static:" followed by an empty text input field. At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Next >" on the right.

22. Enter the Port Number used by the Laserfiche server and click **Next** or you can press **Skip**.

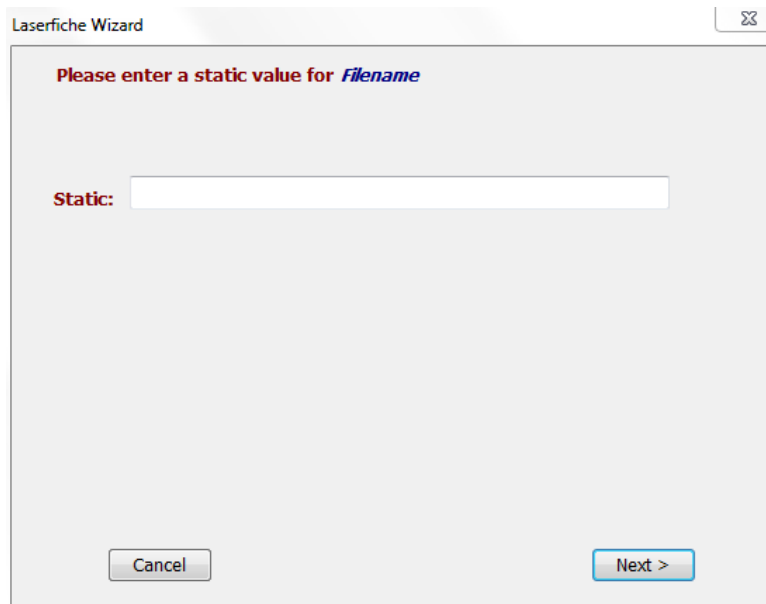


The screenshot shows a dialog box titled "Laserfiche Wizard". The main text reads "Please enter a static value for *Port*". Below this text is a label "Static:" followed by an empty text input field. At the bottom of the dialog, there are three buttons: "Cancel" on the left, "Skip" in the middle, and "Next >" on the right.

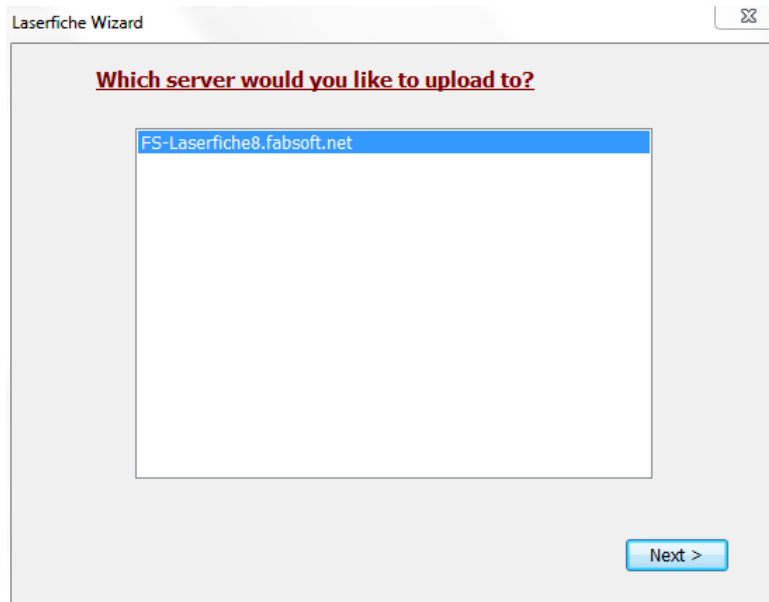
23. Click **Yes**. This may take a few seconds to complete.



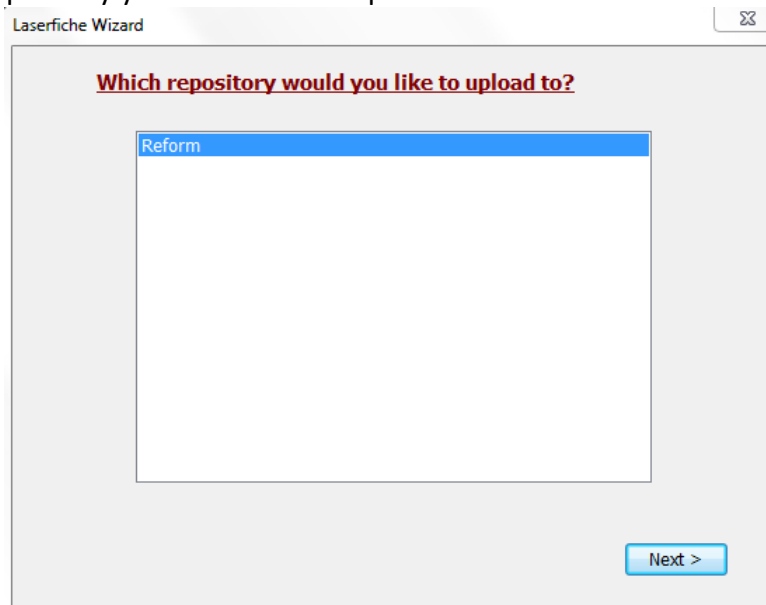
24. Enter a Filename. Click **Next**.



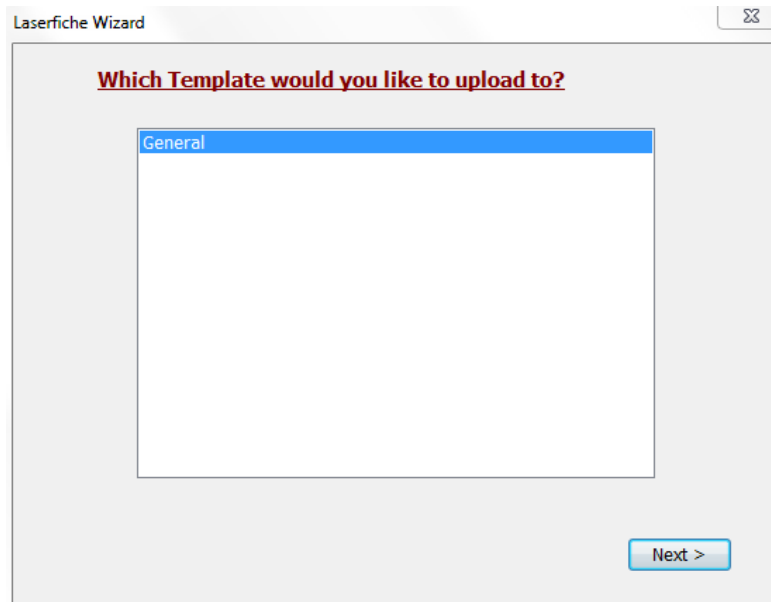
25. Select the server you would like to upload to from the list and Click **Next**.



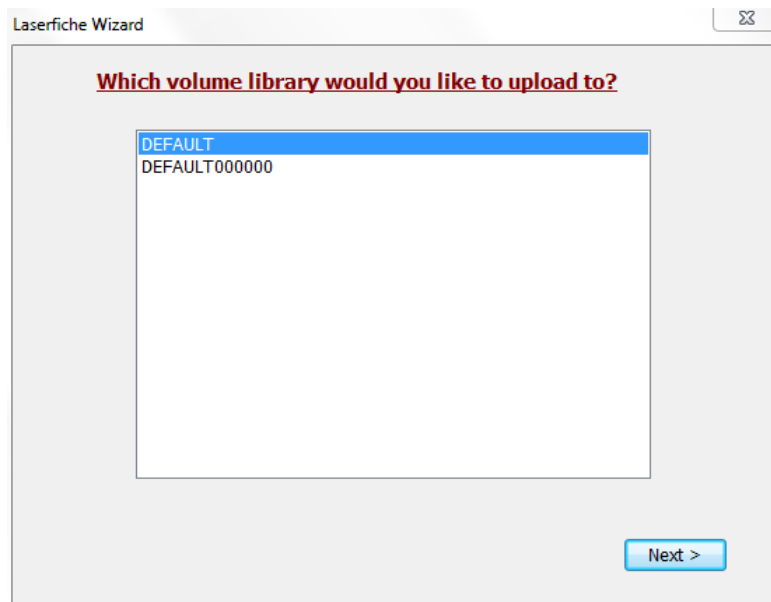
26. Select the repository you would like to upload to from the list and Click **Next**.



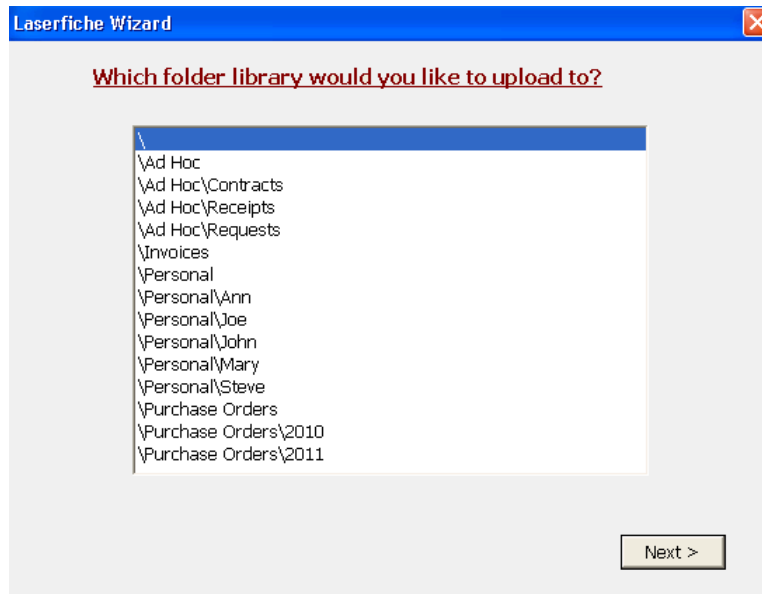
27. Select the Template you would like to upload to from the list and Click **Next**.



28. Select the Volume you would like to use from the list and Click **Next**.



29. Select the Folder you would like to upload to from the list and Click **Next**.

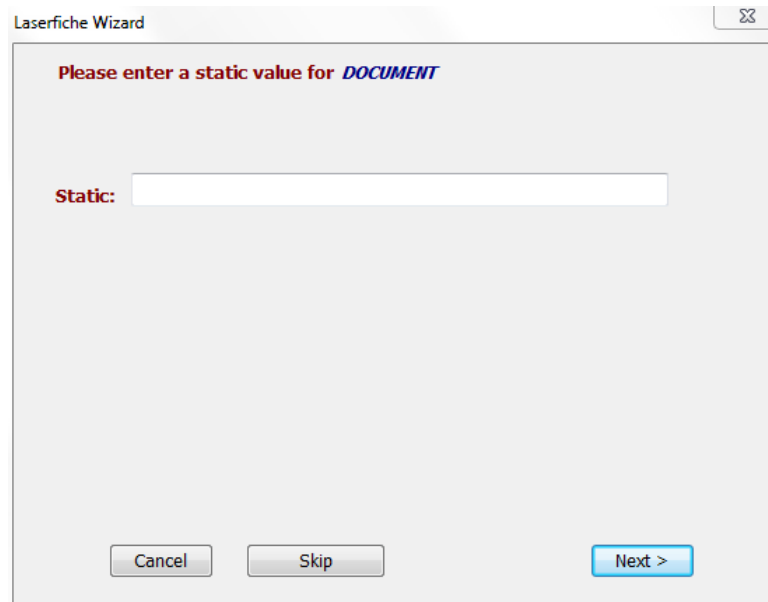


*Note: After doing so, the list of variable data for you to enter in the next few steps will vary depending on what fields are in the template that you selected above.

30. Repeat Step 31 until you have entered or skipped all the fields that you are prompted to enter.

31. Enter a value for DOCUMENT and click **Next**. You may also click **Skip** and have nothing entered into the value.

*Note: Some values may not have a **Skip** button, those are required to be entered.



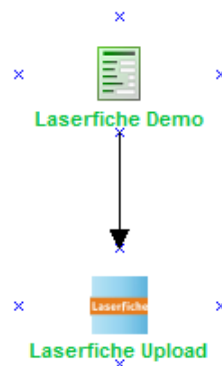
Laserfiche Wizard

Please enter a static value for *DOCUMENT*


Static:

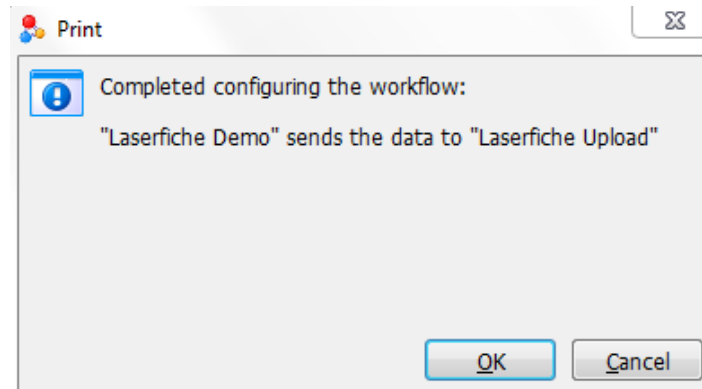
Cancel Skip Next >

32. You have completing configuring your simple Laserfiche workflow. Your 2 objects (“Laserfiche Demo” and “Laserfiche Upload”) should all be green meaning they have been successfully configured and the workflow is ready to be created.



33. To make all the appropriate forms and changes, the workflow must be executed.

This is accomplished by clicking the “Execute” button  Execute on the menu bar. After execution, you will be notified about what has taken place. Click **OK**.

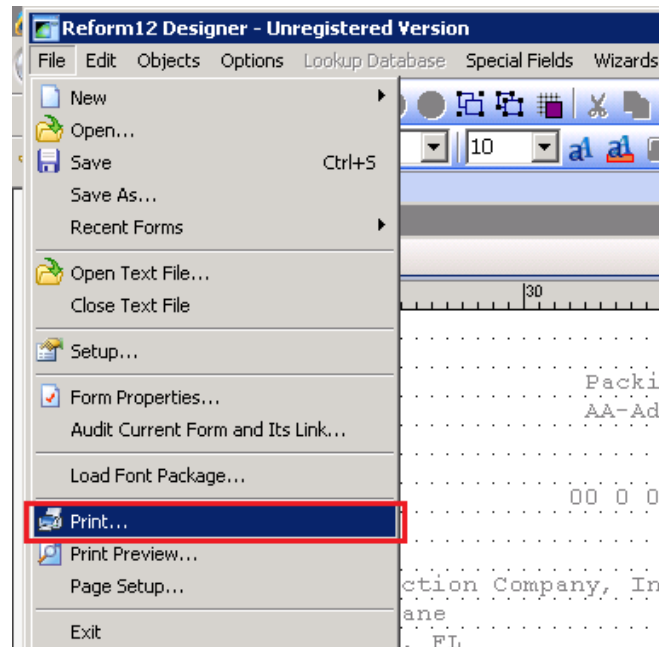


34. You can now close the Workflow Designer. Your form has been saved in your default forms directory. A backup of your original **LaserficheInvoice.FOM** file has been copied to the "**Workflow Designer Original Forms**" folder in your forms directory. **Any permanent form changes should be made to this original form as it is used throughout the form configuration process as a template. If changes are made to this template, you will have to execute your workflow again to see the changes in the forms.**

35. To test your settings and make sure that files can be uploaded, first we should open the form with the Reform Designer. Navigate to your Forms directory and double click **LaserficheInvoice.FOM**. When asked to open the associated TextFile, click **Yes**. Verify that the special fields exist on the right hand side of your form.

Note: make sure that Laserfiche Service is running. For more information please see the **Starting Laserfiche Service** section at the end of this document to start it manually.

36. Go to **File>Print** in the Designer to send the document to Laserfiche.



37. Log into your Laserfiche account and check to see if the document was sent there.

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\Uploads

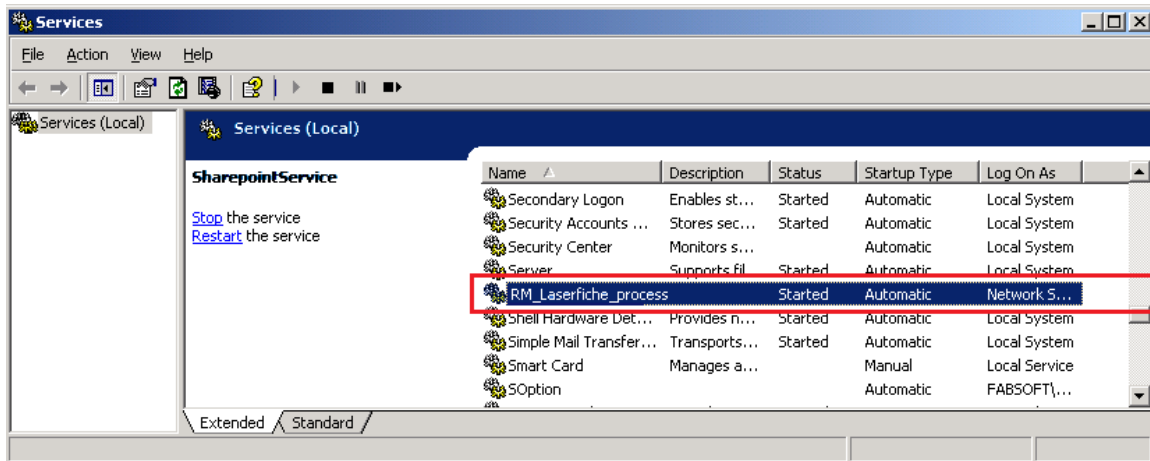
SQL Tables:

Reform_Laserfiche_Trans

Starting Laserfiche Service

Go to Start > Programs > Control Panel > Administrative Tools > Services

Right click on RM_Laserfiche_process > Properties. Under Service status click on Start.



This service acts as a liaison between Reform 12 and Laserfiche. It allows for Reform to upload documents and their properties to the Laserfiche server.

Troubleshooting

Q: Nothing is happening after the form 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 accessed 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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