

Bluelake Software

Laserfiche Import Utility

Overview and Instructions

Description:

Bluelake Laserfiche Import is a configurable application for importing Documents and meta data into Laserfiche. It is a flexible and easy-to-configure utility for importing data from a variety of file formats, into Laserfiche.

It can be used to import documents that were scanned in (for instance) Kofax Ascent Capture and released using Kofax's Text release script. It is particularly useful for Service Bureaus who perform capture of documents into 3rd party systems, on behalf of their clients who run Laserfiche.

While importing, the utility can be configured to create a virtually unlimited number of folders and subfolders in Laserfiche, based on one or more import field values. Likewise, document names within Laserfiche can be based on any number of import field values.

Once configured, the application can run as a scheduled process, or on an ad hoc basis.

While executing, Laserfiche Import requires a live connection to the Laserfiche repository and utilizes a Laserfiche Full user license. In a Service Bureau context, Laserfiche Import would be installed and run at the customer's location.

System Requirements:

Hardware requirements are the same or similar to the minimum requirements for running Laserfiche (P4 or above, 512mb of ram or above, 10mb of available disk space not including import files and document images).

The machine on which the Laserfiche Import utility is installed must have the Laserfiche Client software installed, with connectivity to the Laserfiche repository.

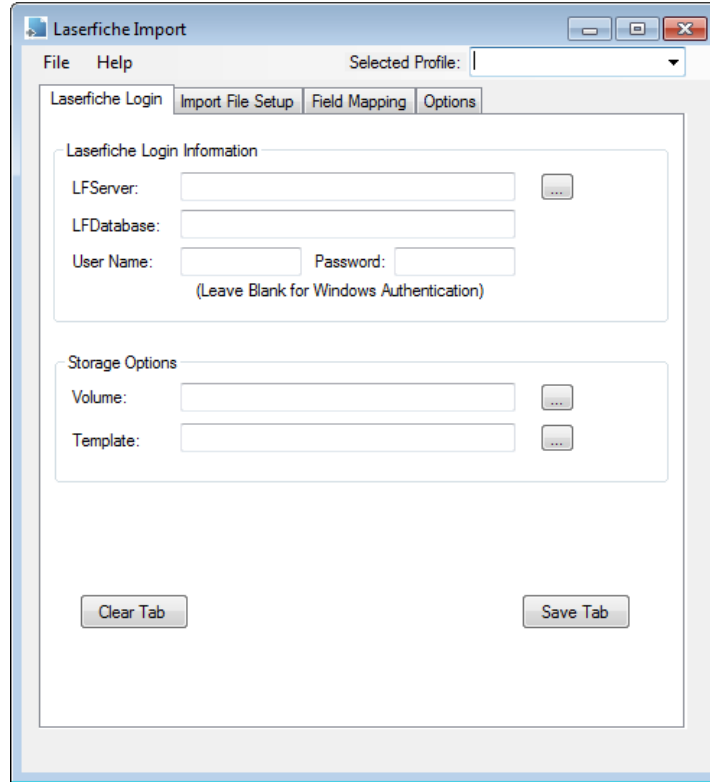
Installation:

A demo download is available at: www.bluelake.com/Products under the Laserfiche-Related Apps and Utilities section.

The demo version is limited to 30 days or 200 documents. The demo can be extended upon request. It can be converted to a permanent version by purchasing a license. Licensing is done on a per-machine basis.

After install (assuming default locations), the application can be found under *Start, Programs, Bluelake Software, Laserfiche Import*. Click on *Laserfiche Import* to bring up the configuration interface.

Configuration Steps:



Configuration is organized into multiple tabs, presented in the order in which they should be provided. The basic sequence of steps is as follows:

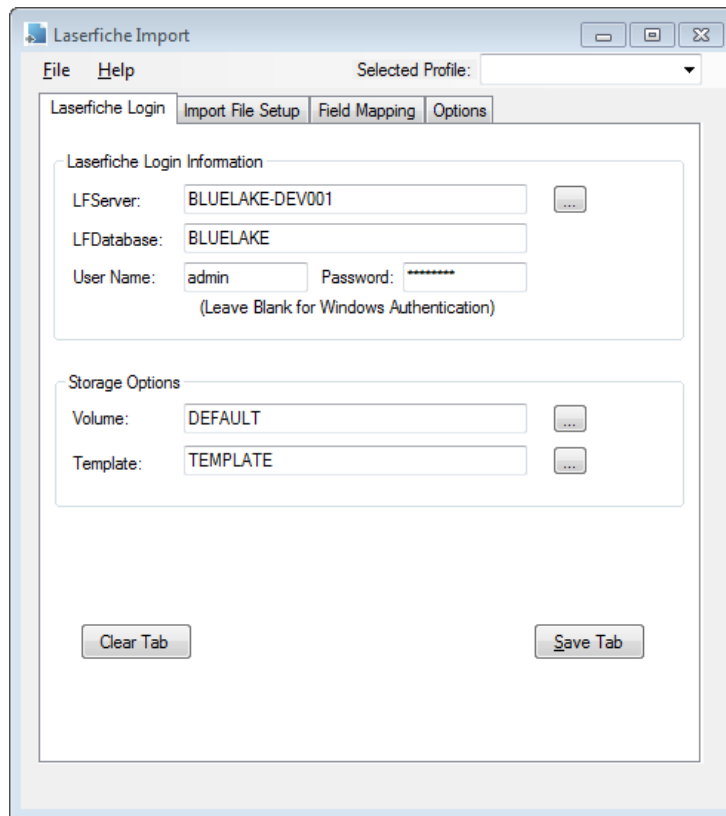
1. Specify Laserfiche Login and related information.
2. Specify the import file information and specify which import fields are to be included or ignored, and (optionally) provide friendly field names for import fields.
3. Specify the Laserfiche folder and subfolder creation criteria, as well as document names and mapping between import fields and Laserfiche Template fields.
4. Specify optional criteria for running the application.
5. Save the collection of information as a “Profile” to be re-used either through the interface or when running as a scheduled task.

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Tab 1 – Laserfiche Login information.

Provide the Laserfiche Server, Database, Login name/password, Volume and Template selection.

Tab 1: Laserfiche Login Information

The screenshot shows the 'Laserfiche Import' application window. The 'Laserfiche Login' tab is active, displaying the following fields and options:

- Laserfiche Login Information:**
 - LFServer: BLUELAKE-DEV001 (with a browse button)
 - LFDatabase: BLUELAKE
 - User Name: admin
 - Password: ***** (with a note: "(Leave Blank for Windows Authentication)")
- Storage Options:**
 - Volume: DEFAULT (with a browse button)
 - Template: TEMPLATE (with a browse button)

At the bottom of the tab, there are two buttons: 'Clear Tab' and 'Save Tab'.

LFServer/LF Database

Click on the browse button to the right of the LF Server box to select a Laserfiche Server and Database. Using the browse button ensures that the workstation or server being configured to run the Laserfiche Import has connectivity to Laserfiche.

User Name/Password

Provide a valid Laserfiche UserName and Password, or leave blank for Windows Authentication.

Volume

Use the browse button to the right of this field to select a valid Laserfiche Volume.

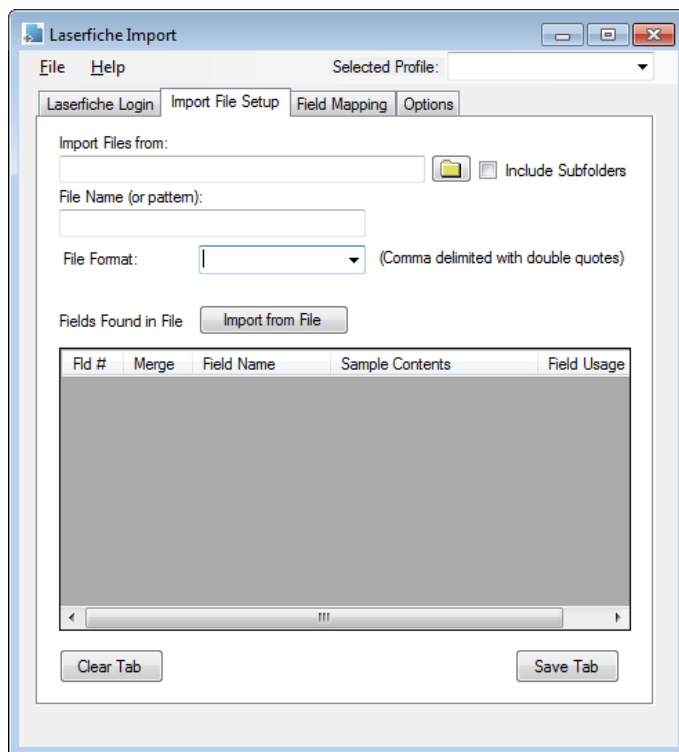
Template

Use the browse button to the right of this field to select a valid Laserfiche Template.

Click Save at the bottom of this tab to save the information before moving onto the next tab.

Tab 2 – Import File Setup

The Import File Setup tab contains information about the file(s) to be imported, and is used to specify which fields from the import file(s) should be made available to Laserfiche.



Import File Setup Tab elections

Import Files From

Copy and paste or use the folder browse button to select the source folder from which file(s) are to be imported.

Include Subfolders

When checked, subfolders below the immediate “Import Files From” folder will be included in the search for metadata import files matching the specified filename pattern.

Please note that when processing metadata files in subfolders, image file paths within each metadata file must be resolvable from the location where the metadata file is found. This can be achieved by ensuring that relative paths are correct within each file, or alternately, provide absolute file paths within the metadata files and select the "Image Path is Full Path" option on the Options tab.

File Name (or pattern)

Provide a full file name (i.e. export.txt) or a file name pattern (i.e. export*.txt) for selection of files within the source folder.

File Format:

Choose a predefined format such as “Ascii Text”, “Kofax Text”, or “Kofax Express”, or select “Custom” to provide a custom field delimiter, and optionally a custom subfield delimiter character.

Note, for multivalued field support in Laserfiche 8 or above, you MUST select the “Custom” format and provide a value for the subfield delimiter.

The format selections are explained below.

Ascii Text	Supports a comma delimited file, with double quotes around fields and carriage return + line feed as the end-of record character.
Kofax Text	Supports the file format output by the Kofax Capture Text Release script.
Kofax Express	Supports the file format output by Kofax Express.
XML	Supports XML file input (assumes 1 XML file per document). Note, this option requires additional licensing after the evaluation period expires. (XML Setup instructions begin on Page 7)
Custom	If “Custom” is selected, provide the following additional information:

(Custom Format options – continued)

Field Delimiter

Provide the field delimiter, such as the pipe (|) character. When selecting a field delimiter it is very import to select a character that is not likely to appear within the metadata for documents. This is why the pipe (|) character is often used. Note, you can also provide multiple character field delimiters, such as “|””, “|**|”, etc., further decreasing the chances that the field delimiter sequence will be found within the metadata.

SubField Delimiter (optional)

Support for multi-valued fields in Laserfiche started with version 8.x. To import meta data to multi-valued fields in Laserfiche, a subfield delimiter must be provided. In addition, the Laserfiche Template field must be configured for “multiple” entries (Laserfiche Admin Console, Metadata fields).

The specified subfield delimiter will denote multi-instance field data embedded within a field. For instance, if the selected field delimiter is a pipe (|) character and the specified subfield delimiter is ~~ , the input file should appear as follows:

Field 1|Field 2|**field 3 value 1~~field 3 value 2~~field 3 value 3**|Field 4|...

Like Field Delimiters, when selecting a Subfield delimiter it is very import to select a character that is not likely to appear within the metadata for documents, and it is permissible and recommended to use a sequence of 2 or more characters to denote a subfield.

Record Delimiter

This is currently set at Carriage Return + Line Feed (CRLF) – in other words, files that contain one record per line. For other end-of-record delimiters, contact Bluelake for a customized version.

Merge

When the merge option selected an additional column will appear in the Import fields list. For each field that is checked, and in conjunction with the Mapping tab where these fields are mapped to a Laserfiche template field, if an existing Laserfiche document is found with matching values in the fields, the input document will be added to the existing document in Laserfiche. Otherwise a new document will be created from each import file document record.

Fid #	Merge	Field Name	Sample Contents	Field Usage
1	<input type="checkbox"/>	Field1	BUILDING	[Send To LF] ▼
2	<input type="checkbox"/>	Field2	6800	[Send To LF] ▼
3	<input type="checkbox"/>	Field3	KILDARE AVE	[Send To LF] ▼
4	<input type="checkbox"/>	Field4	04/17/2008	[Send To LF] ▼
5	<input type="checkbox"/>	Field5		[ignore] ▼
6	<input type="checkbox"/>	Field6	ARCHIVE	[ignore] ▼
7	<input type="checkbox"/>	Field7	00000001.TIF	[Image File] ▼

Fid #	Merge	Field Name	Sample Contents	Field Usage
1	<input checked="" type="checkbox"/>	Field1	BUILDING	[Send To LF] ▼
2	<input checked="" type="checkbox"/>	Field2	6800	[Send To LF] ▼
3	<input checked="" type="checkbox"/>	Field3	KILDARE AVE	[Send To LF] ▼
4	<input type="checkbox"/>	Field4	04/17/2008	[Send To LF] ▼
5	<input type="checkbox"/>	Field5		[ignore] ▼
6	<input type="checkbox"/>	Field6	ARCHIVE	[ignore] ▼
7	<input type="checkbox"/>	Field7	00000001.TIF	[Image File] ▼

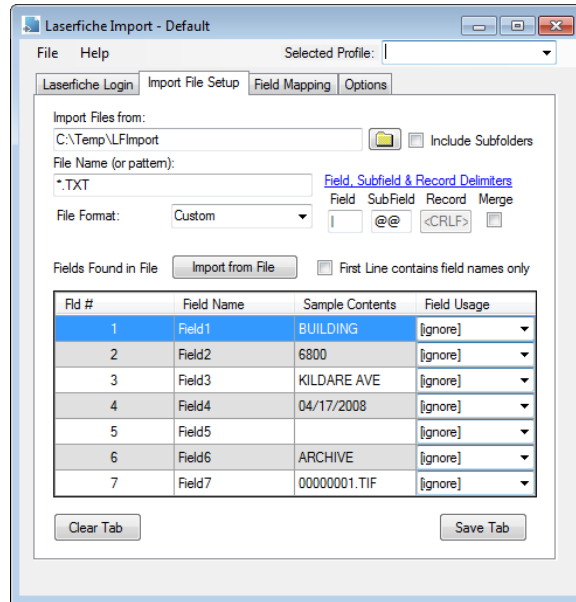
First Line Contains Field Names only

This option replaces the Field Name in each position with the value contained in the first record of the file

Import From File Button (not applicable to XML option)

After specifying the import file format, click the Import From File button to test the file format, and import a single record from the first record in the file. This includes sample data from the first line of the file, to assist in identifying which import fields should be made available for mapping to Laserfiche. When “First Line Contains Field Names Only” is checked, the first line of the file is used to set the Field Name value, and the second line is read to provide sample data.

Please see next page for an example Import File configuration immediately after configuring a "Custom" file format with the first line in the file containing field names and selecting the “Import From File” button. Note the Field Name and Field Usage columns.



Selecting Import Fields for inclusion in the Import (not applicable to XML option):

After importing a test record, the fields contained in the import file are listed in the Import File Setup tab.

Merge (not shown in example above)

When the merge option selected an additional column will appear in the Import fields list. For each field that is checked, and in conjunction with the Mapping Tab where these fields are mapped to a Laserfiche template field, if an existing Laserfiche document is found in the destination Laserfiche folder, with matching values in these fields, the input document will be added to the existing document in Laserfiche. Otherwise a new document will be created from the import file document contents.

Fld #	Merge	Field Name	Sample Contents	Field Usage
1	<input type="checkbox"/>	Field1	BUILDING	[Send To LF] ▼
2	<input type="checkbox"/>	Field2	6800	[Send To LF] ▼
3	<input type="checkbox"/>	Field3	KILDARE AVE	[Send To LF] ▼
4	<input type="checkbox"/>	Field4	04/17/2008	[Send To LF] ▼
5	<input type="checkbox"/>	Field5		[ignore] ▼
6	<input type="checkbox"/>	Field6	ARCHIVE	[ignore] ▼
7	<input type="checkbox"/>	Field7	00000001.TIF	[Image File] ▼

Fld #	Merge	Field Name	Sample Contents	Field Usage
1	<input checked="" type="checkbox"/>	Field1	BUILDING	[Send To LF] ▼
2	<input checked="" type="checkbox"/>	Field2	6800	[Send To LF] ▼
3	<input checked="" type="checkbox"/>	Field3	KILDARE AVE	[Send To LF] ▼
4	<input type="checkbox"/>	Field4	04/17/2008	[Send To LF] ▼
5	<input type="checkbox"/>	Field5		[ignore] ▼
6	<input type="checkbox"/>	Field6	ARCHIVE	[ignore] ▼
7	<input type="checkbox"/>	Field7	00000001.TIF	[Image File] ▼

Field Name:

Meaningful field names are useful (though not required) when mapping import fields to Laserfiche Template fields later on the Field Mapping tab. If the first line of the import file contains field names and the "First Line contains field names" option is selected, the field names column will already be populated with meaningful field names. If not, each field will be assigned a name from "Field 1" through "Field n" where n is the total number of input fields found in the file. You can click in the Field Name cell for each input field to change the field name from "Field n" to a more meaningful name – for instance "Company Name" instead of "Field 1", "Code" instead of "Field 2", etc.

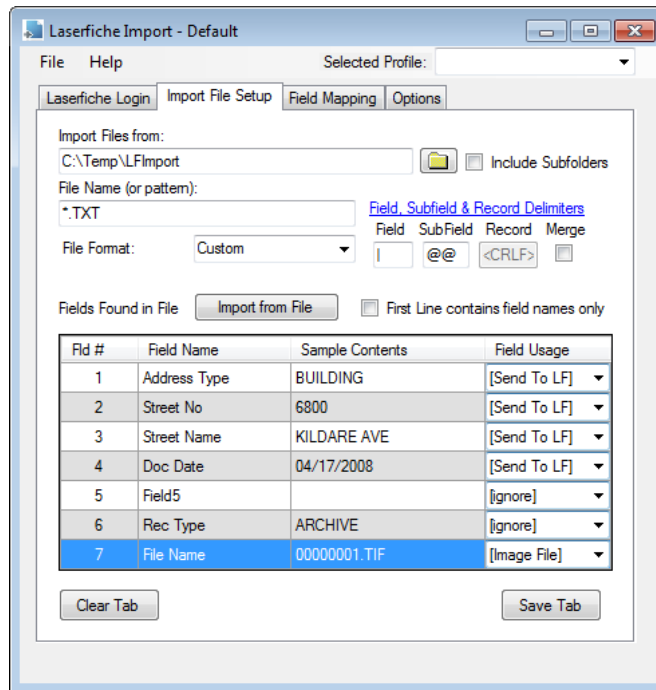
Sample Contents:

Sample contents contains the first line of data from the test import from the import file (if "First Line is field names" is checked, this will be from the 2nd line of the file).

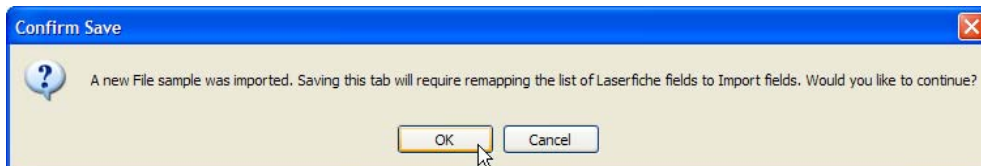
Field Usage:

Each field has a Field Usage column that determines whether to make the field available for mapping to a Laserfiche Field "[Send to LF]", where to ignore it "[ignore]" and also which of the fields contains the path to the document file [Image File]. One field and only one field MUST be declared as the image file field.

Below is an example of the Import File Setup tab with the Field Names and Field Usages set.

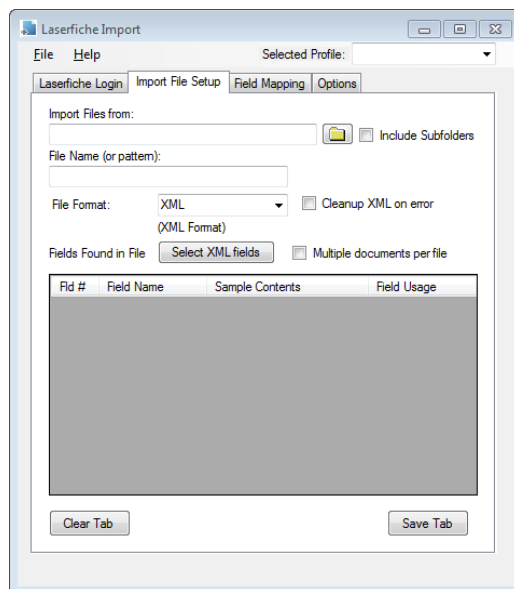


Press the "Save" button to save the contents of the current tab. A warning message will appear as shown below, noting that fields on the Field Mapping window will be reset. Select OK to this message.



Tab 2 - XML Format Configuration

When the XML format option is selected, the button options on Tab 2 will change slightly, as shown below:



Import Files From

Copy and paste or use the folder browse button to select the source folder from which file(s) are to be imported.

File Name (or pattern)

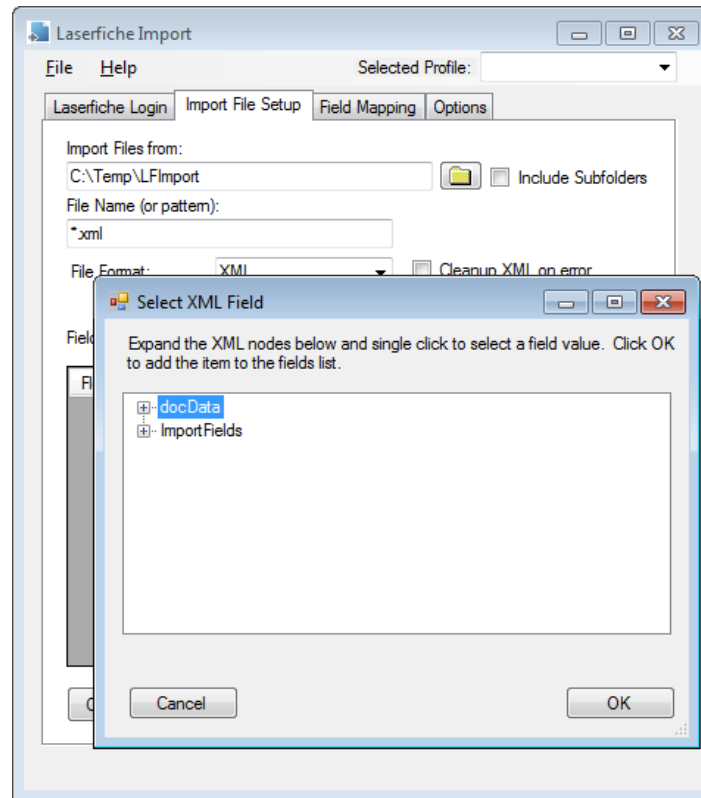
Provide a file name pattern (i.e. export*.xml) for selection of files within the source folder. The XML format assumes one XML file per document to be imported into Laserfiche.

File Format: XML

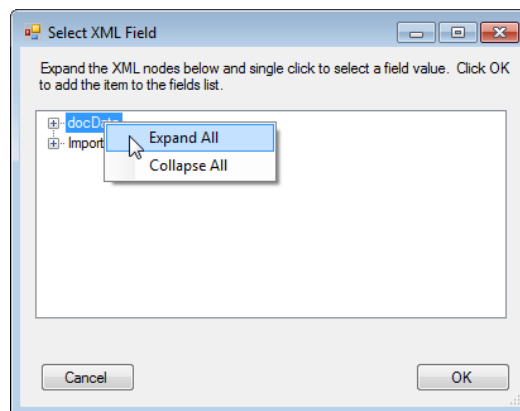
Cleanup XML on error: Sometimes XML file contents provided by third parties may contain invalid XML, such as issues with case sensitivity within XML tags (<Section 1>...</section 1>) or invalid characters within XML such as the ampersand (&) character showing up within data fields without the proper XML escape character syntax. When this option is selected (checked) and an XML format error is encountered when loading a file, an attempt will be made to fix common XML errors and reload the XML file. Case sensitivity errors will be corrected and invalid characters will be removed. Messages will be written to the log file indicating that an error occurred and was subsequently corrected so that follow-up can occur with the provider of the XML file.

Select XML Fields button

After specifying the path and filename pattern for XML files, click the “Select XML Fields” button. At the “Changes have not been saved...” prompt select Yes. The Select XML Field window will display, as shown below. The *Select XML Field* window presents the various nodes contained in the XML file in a hierarchical format.



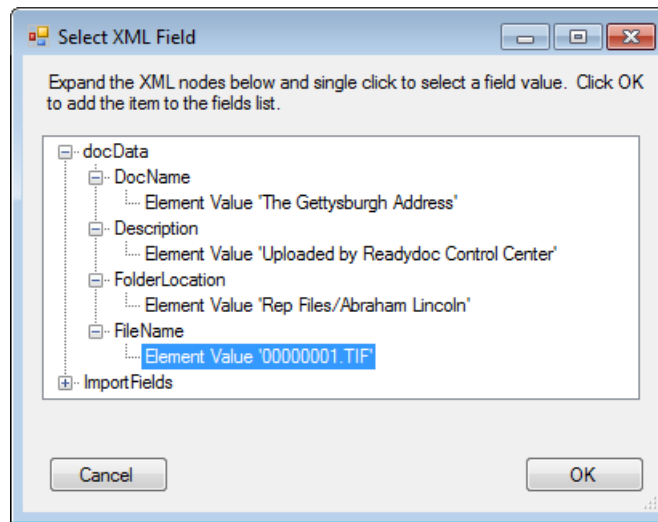
Click the + sign to expand a node individually, or right click on any node and select Expand All to expand all the nodes contained in the XML file.



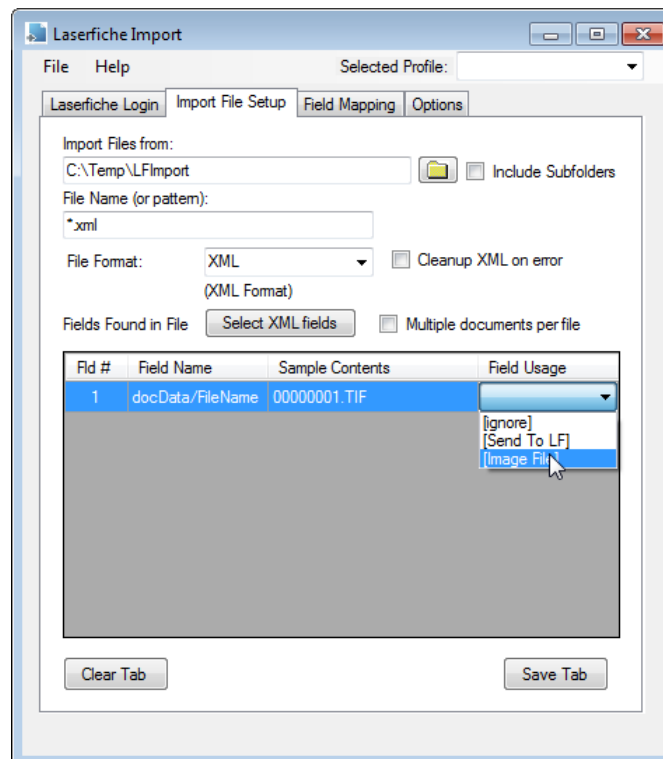
To select a node, navigate to the lowest level entry in the node and click to select it, then click the OK button to add it to the import fields list.

As with the other file formats, at least one of the selected fields must be a reference to the electronic document file that will be forwarded to Laserfiche, along with the meta-data.

Though it does not have to be the first field selected, in our example we will select the field containing the file name reference first, as shown below:

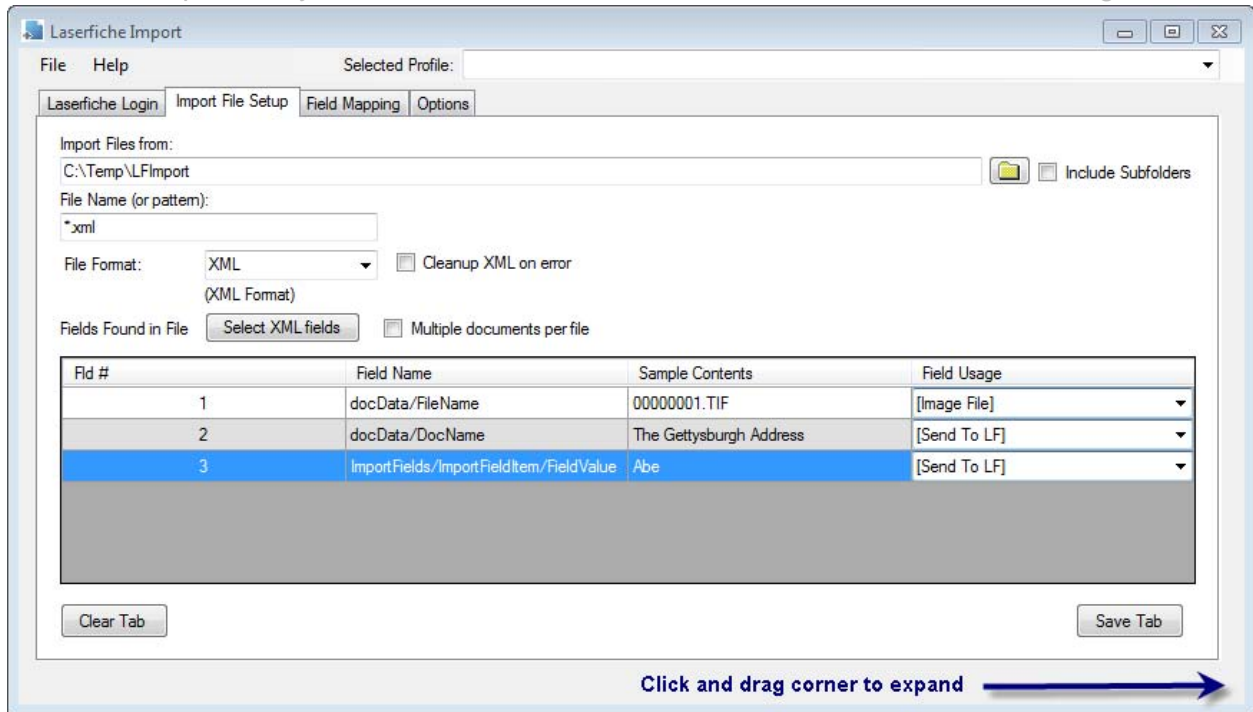


And after it is added to the field list on the Import Tab, we select “[Image File]” in the field usage dropdown list:

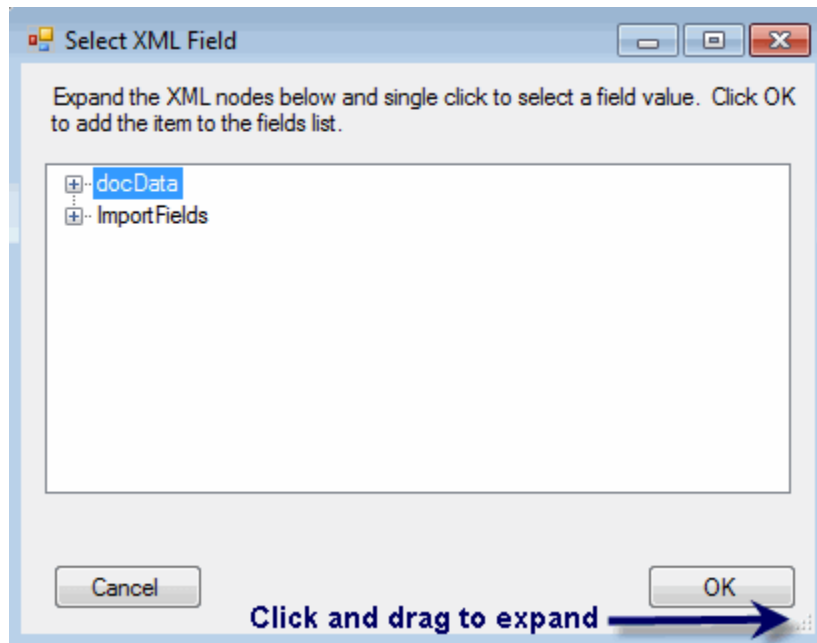


Click the Select XML Fields button again for each field that will be extracted from the XML file. Be sure to set the Field usage as “Send to LF” for the remaining fields to be extracted from the XML file.

NOTE: XML field name references can be quite long. You can click and drag the lower right corner of the Laserfiche Import configuration window to widen the display for long field names.

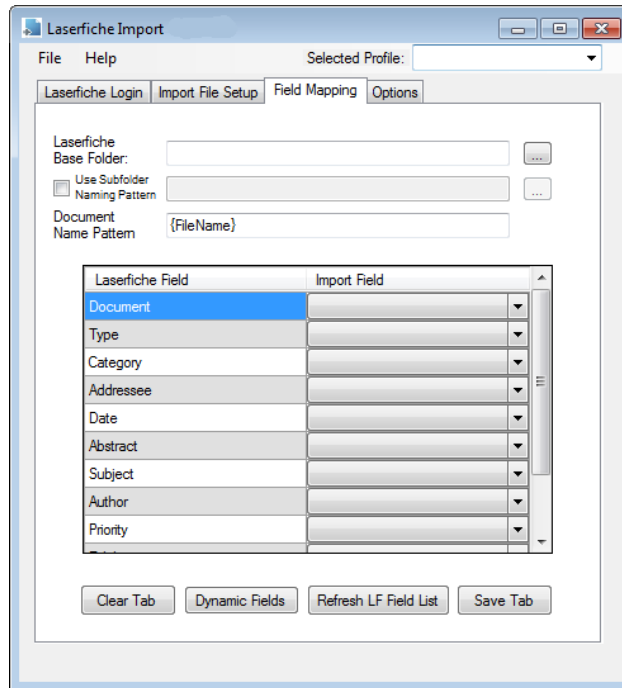


Likewise, the Select XML Field window is also resizable by clicking and dragging from the lower right corner.



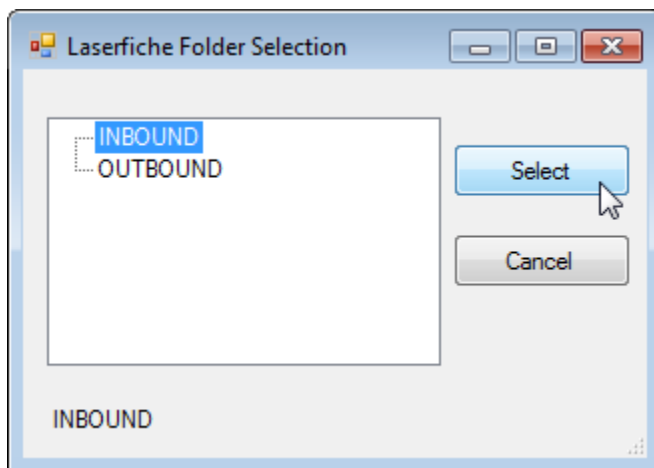
Tab 3 – Field Mapping

The Field Mapping tab is used to associate the fields defined previously from the Import File setup, with Laserfiche folder, document or index field names.



Laserfiche Base Folder

Click on the browse button to browse the Laserfiche folder structure (based on correct login information provided on the first Laserfiche Login tab) – the following window will appear:

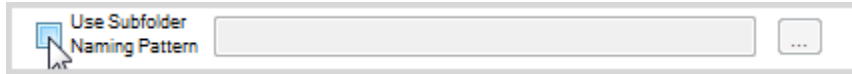


Select the starting folder in Laserfiche to import documents. Double-click to drill down additional levels, as applicable.

(Field Mapping Tab Selections – Continued)

Use Subfolder Naming Pattern

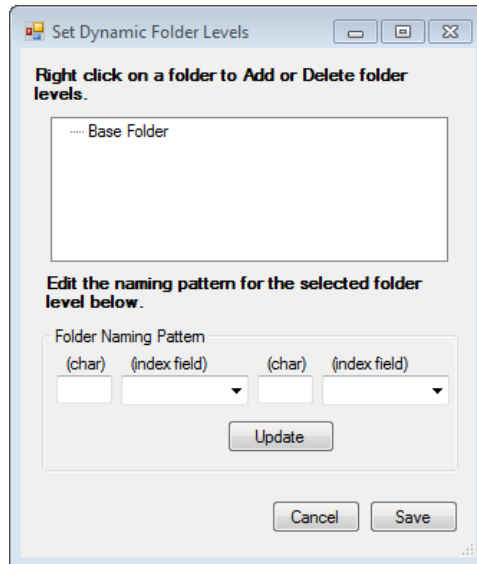
Click on the checkbox to enable this function if subfolders are to be created dynamically, based on metadata field values.



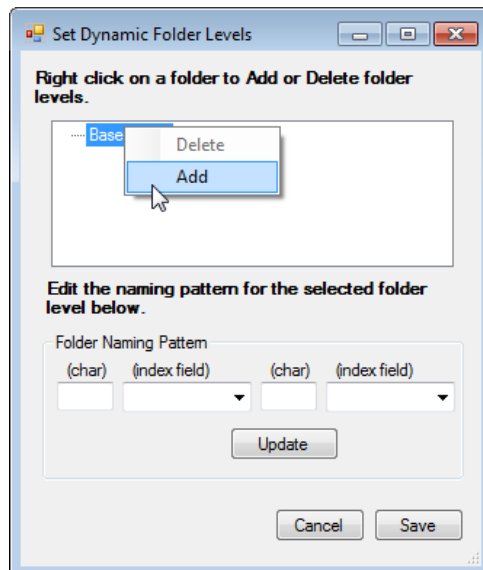
Then click on the browse button to the right of the field to bring up the folder creation window.



The folder creation window is shown below:

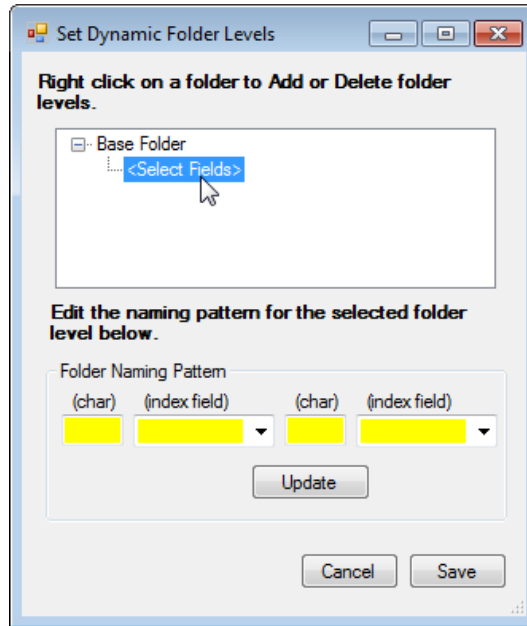


Right click on the "Base Folder" level and select Add to add another level.



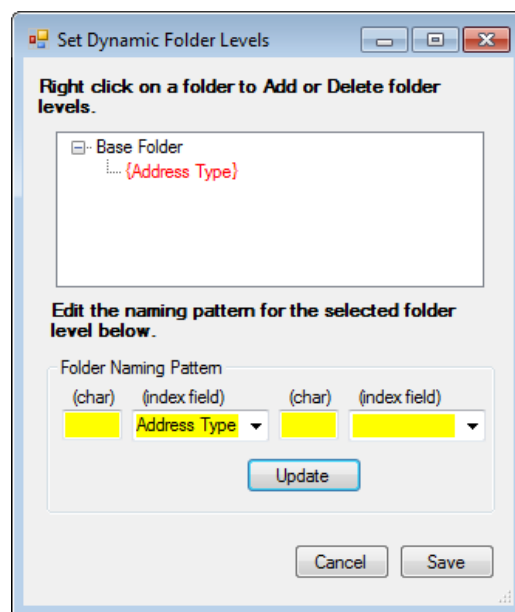
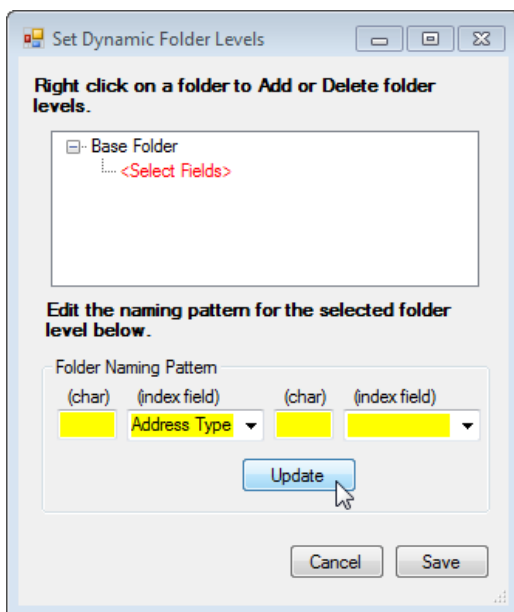
(Tab 3 Selections – Subfolder Naming - Continued)

Click on the <Select fields> text at the new level to specify the dynamic contents for that folder level. At each level, you may specify up to two index fields, along with intervening static text.



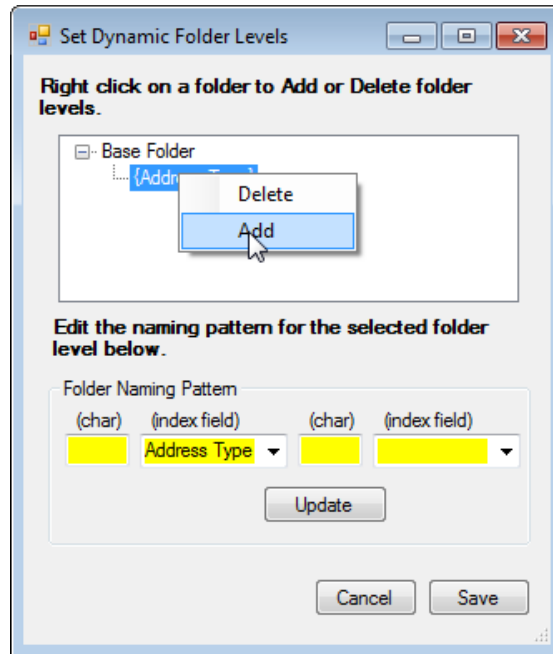
For this example, we will create two levels deep, consisting of the first level made up of Address Type associated with the document (i.e. “BUILDING”), and the second level being a combination of Street Number and Street Name.

Selection of the first level is shown below. We select “Address Type” from the index field list (left image, below), then click update (right image).

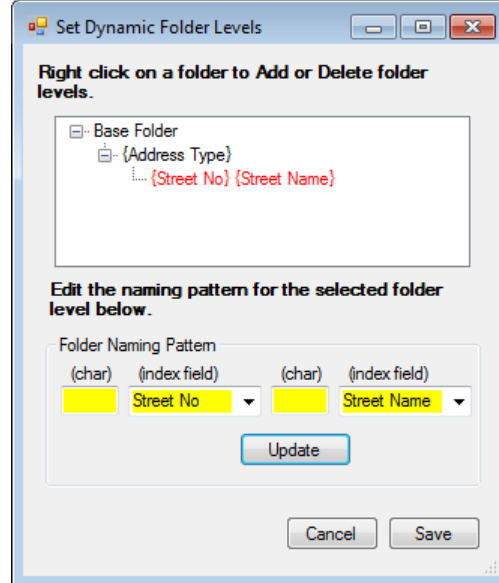
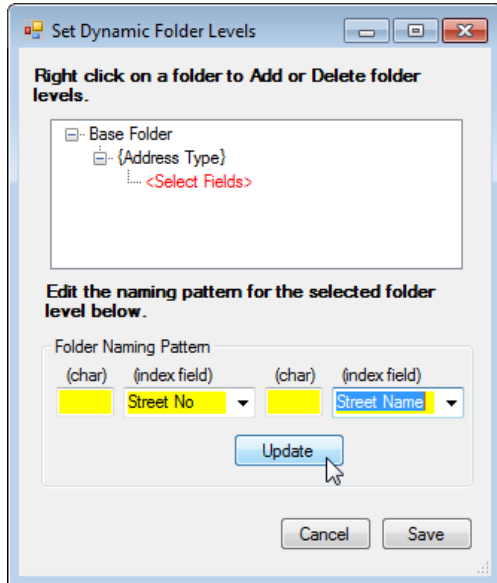


(Tab 3 Selections – Subfolder Naming - Continued)

Next, we right click on the Address Type level and select Add:



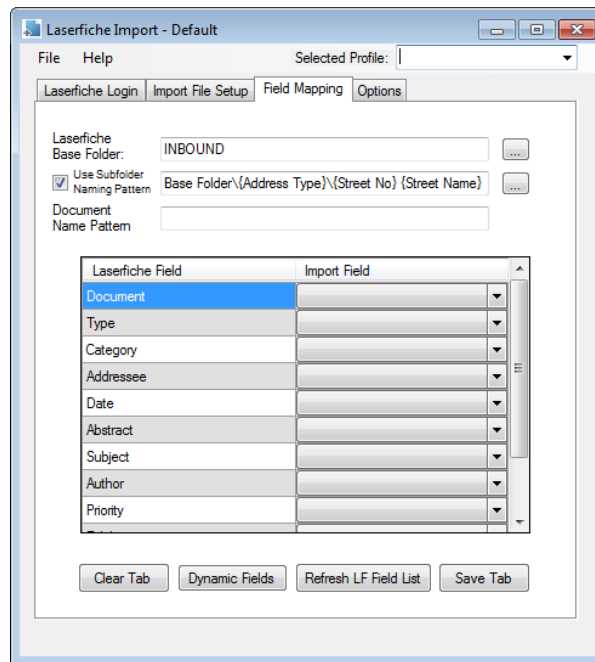
Then click on <Select Fields> for the new level and select Street Number from the first Index field list, then type a space into the (char) box between, then select Street Name from the second index field box (image left) and click Update. The result is shown on the right, below.



Click Save at the bottom of the window to Save the selections and return to the Field Mapping tab. (see next page).

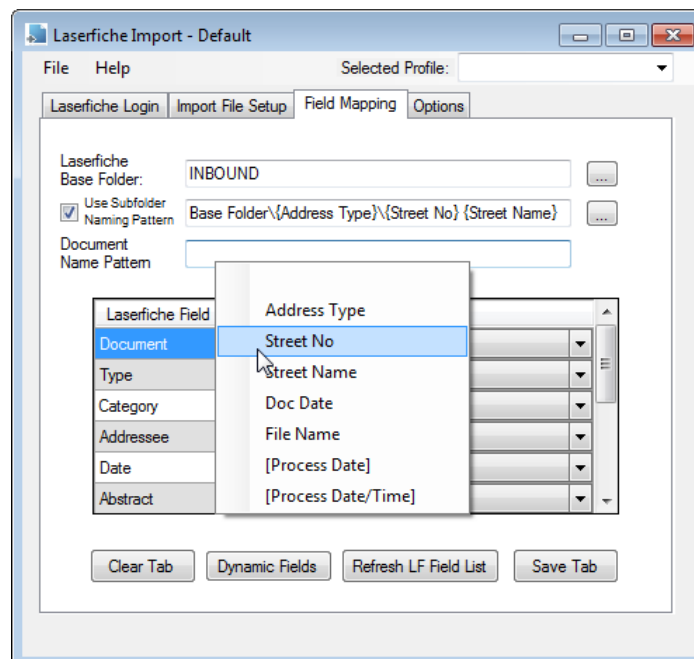
(Tab 3 Selections – Continued)

Field Mapping Tab 3 - With dynamic subfolder values configured



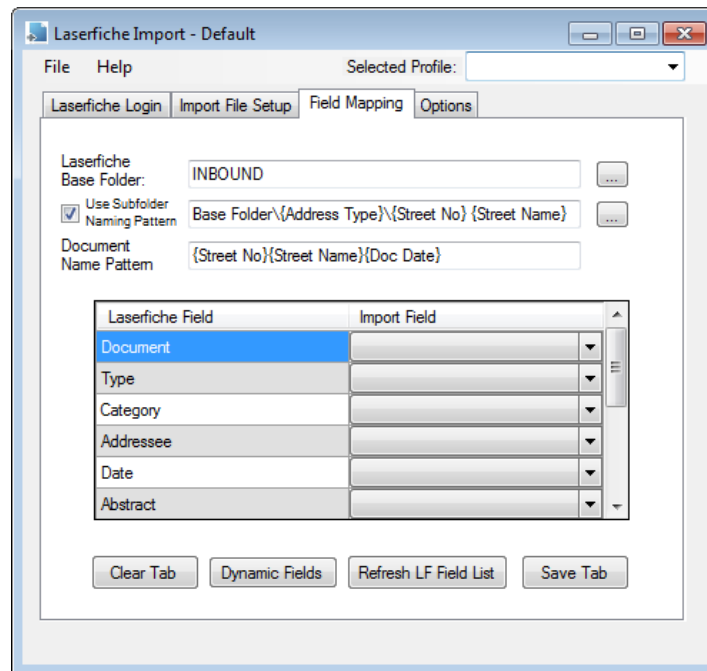
Document Name Pattern

The document name pattern allows specification of any combination of static text and imported index fields to determine how documents are named in Laserfiche. To access the list of index fields, right click within the document name pattern field. The values forwarded from the Import file are displayed.

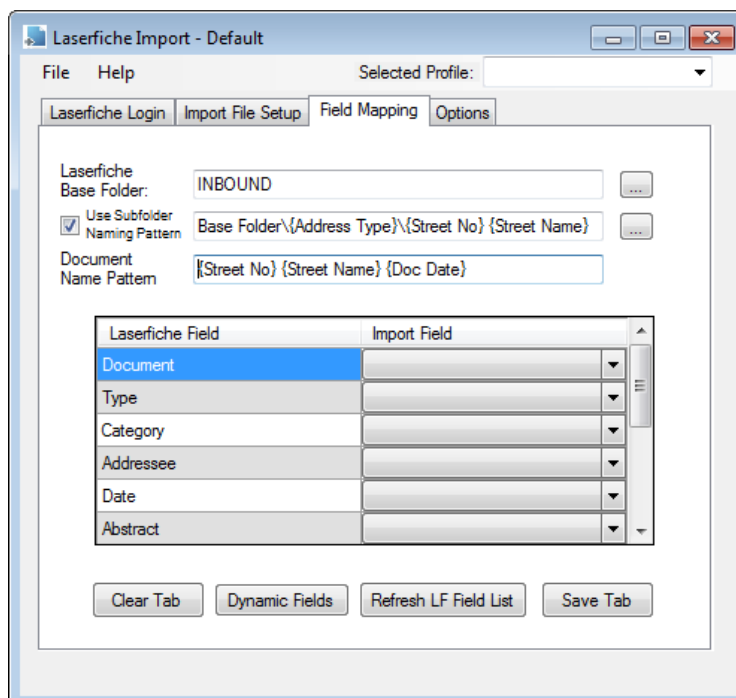


(Tab 3 Selections – Continued)**Document Name Pattern (continued)**

In our example, we want the documents to be named according to the pattern <Street Number> <Street Name> <Document Date>. Therefore, we will right click 3 times to select Street Number, then select Street Name, then select Document Date, as shown below.



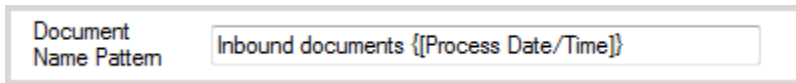
We will then manually click into the Document Name pattern field and insert a space between each of the selected field names, as shown below.



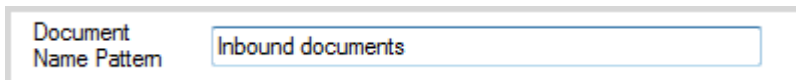
(Tab 3 Selections – Continued)

Document Name Pattern (continued)

Static Text can also be typed into the Document Name pattern field, in conjunction with meta data fields or on its own. For instance:



Or to create documents in Laserfiche with static naming - for Instance *Inbound documents*, *Inbound documents (1)*, *Inbound documents (2)*, etc:

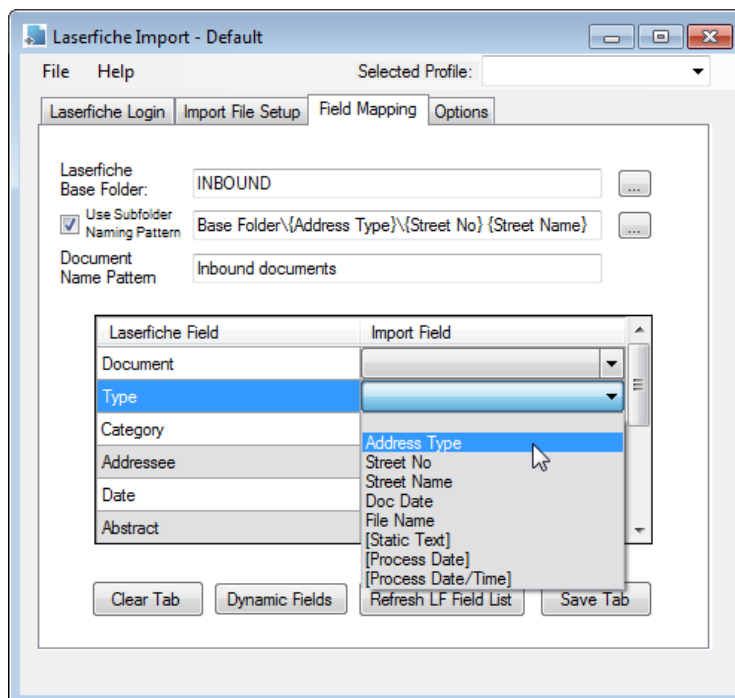


If the Document Name pattern box is left empty, Laserfiche Import will use the name of the imported "image" file, minus the file extension.

Field Mapping

The final task on the Field Mapping Tab is to provide the actual mapping between the import fields and Laserfiche. This is accomplished by selecting a value from the Import Field columns dropdown list, for each of the desired Laserfiche fields.

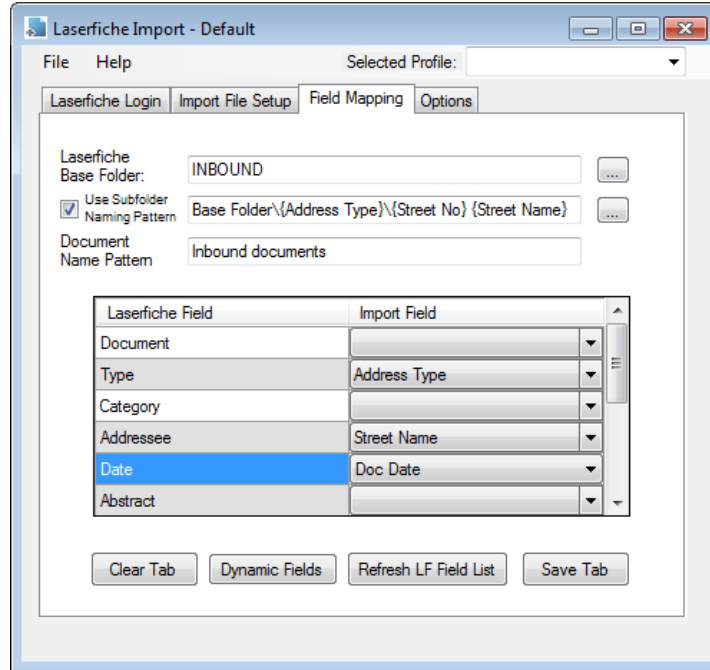
Note, if "friendly" names were not provided on the prior Import File Setup tab, then values such as "Field1", "Field2", etc will appear in the Import Field dropdown list. In the example below, we provided friendlier names for these fields – i.e. Address Type, Street Number, Street Name, etc.



(Tab 3 Selections – Continued)

The end result of mapping the remaining fields is shown below.

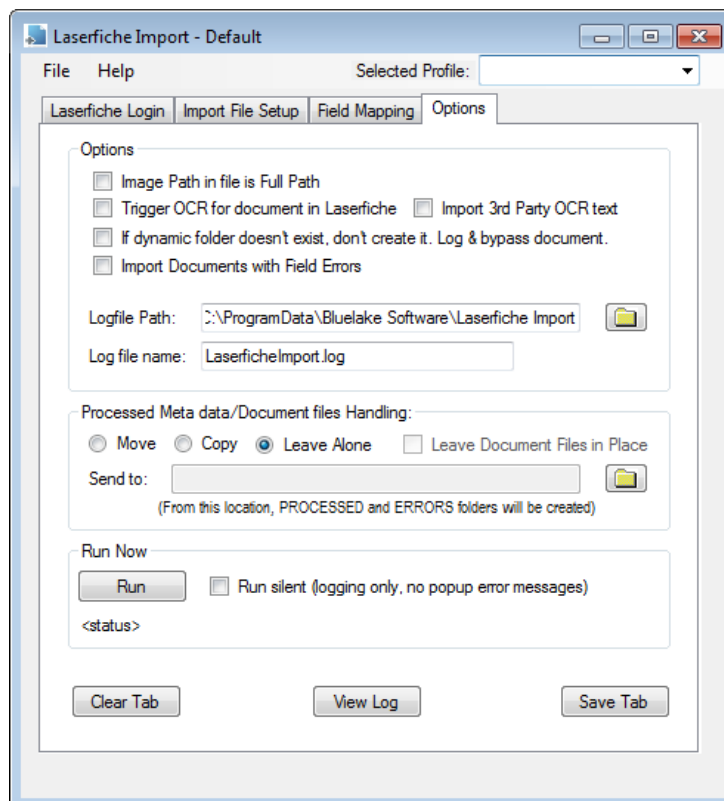
Field Mapping Tab – Completed:



Be sure to click on the Save button at the bottom of this tab to Save these values.

Tab 4 - Options

The Options tab provides various configuration options that affect how the Laserfiche Import application will operate and is also the launch point for running Laserfiche Import in interactive mode.



Options:

Image Path in file is the full path

The default behavior is to extract the image file name only, from what is provided as the image name in the import file (ignoring path information if provided). Checking this option will cause the full path as provided in the Import file to be used.

Trigger OCR for document in Laserfiche

If this option is selected, Laserfiche OCR will be triggered for each document as it enters Laserfiche. Note that this option will slow the import process based on the average document size in pages, since Laserfiche OCR will need to run for each document. There are other solutions for OCRing documents after they have entered Laserfiche.

If dynamic folder doesn't exist, don't create it...

If checked, new dynamic folders will not be created. If a folder does not exist that matches the defined subfolder pattern, the document will be bypassed and an entry made to the log file.

Logfile Path:

If provided, will override the default location for the application log file. The default location for the log file is as follows:

Windows 7/Vista/Server 2008:

C:\Program Data\Bluelake Software\Laserfiche Import

Windows XP/Server 2003:

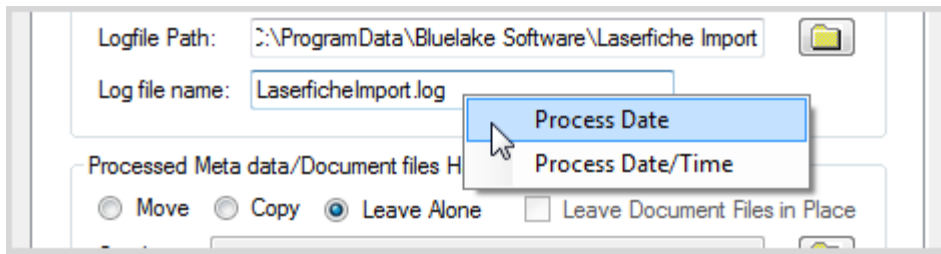
C:\Documents and Settings\All Users\Application Data\Bluelake Software\Laserfiche Import

Log file name:

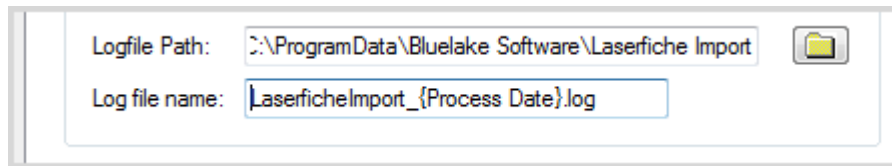
If provided, will override the default file name for the application log file. The default file name is *LaserficheImport.log*.

Optional: Append Process Date or Process Date/Time to the log file name:

Right click on the Log file name field and select either Process Date or Process Date/Time to have these values appended to the file name – for instance, LaserficheImport_2012-07-01.log.



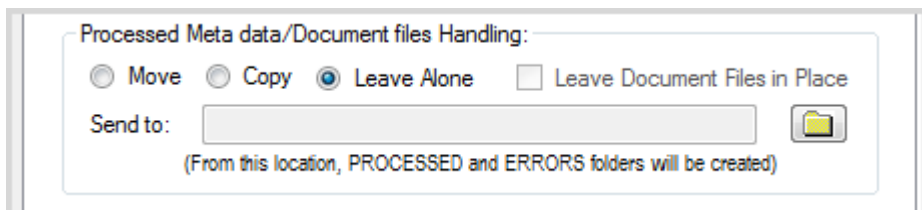
Result:



Appending the Process Date to the log file name has the effect of creating a single log file for all imports processed on a given date. Appending the Process Date/Time has the effect of creating a log file each time Laserfiche Import is executed.

Processed Document Handling:

Move/Copy/Leave Alone options describe what the Laserfiche Import application should do with import files and associated image files after they are processed.



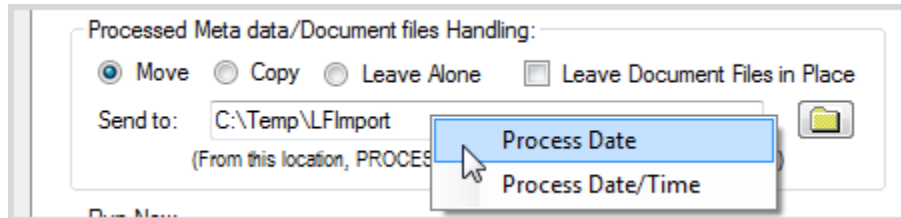
When a CD or DVD is the source of the Import files and Images, only the Copy or Leave Alone options should be selected, otherwise errors will result since these media are, by definition, READ Only.

Send To:

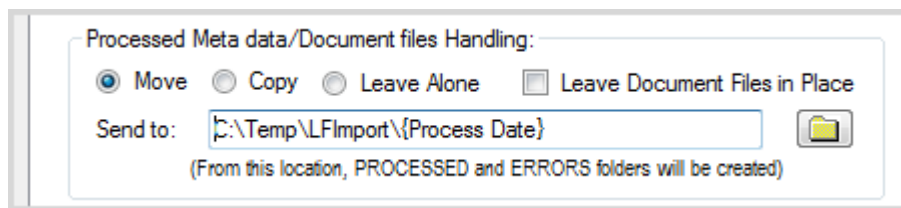
Specify a folder location to move or copy processed files after processing.

Optional: Append Process Date or Process Date/Time to the SEND TO location:

Right click on the "Send to" field and select either Process Date or Process Date/Time to have these values appended to the Send To folder location.



Result:



This option, in conjunction with appending Process Date or Date/Time to the Log file name provides segregation of processing results into separate log files and folders according to the Process Date or Process Date/Time.

Leave Document Files in Place:

Normally both the meta data files and document files "Processed" handling is the same. However there are some scenarios such as in a document conversion from another system to Laserfiche, where the meta data files need to be moved after import but the underlying document files need to be left in place. Checking this option will cause the document files to be left in place, independent of the Move/Copy or Leave Alone option selected for the meta data files.

Run Now

The Run button allows running of the application using the current settings for testing or Ad Hoc processing purposes. When running in this mode, the default is to display error messages to the user. To avoid visible error messages (which halt processing), select the Run Silent checkbox.

View Log button

Select this button to view the application log. A snippet of the application log is shown below:

```
6/24/2008 11:14:47 AM> ** Processing Started...
6/24/2008 11:14:47 AM> Processing file: E:\Backups\Import\CFile1-convert.txt...
6/24/2008 11:14:47 AM> Creating LF Folder: SWS Files\AR1\Client Files\Smith, Clifford Family
6/24/2008 11:14:49 AM> Created Document (DocID: 14392) Name: Smith Confidential Data
6/24/2008 11:14:50 AM> Created Document (DocID: 14393) Name: Smith 401K Documents
```

6/24/2008 11:14:52 AM> Created Document (DocID: 14394) Name: Smith Beneficiary Spreadsheet
 6/24/2008 11:14:54 AM> Created Document (DocID: 14395) Name: Smith Investment Policy Statement

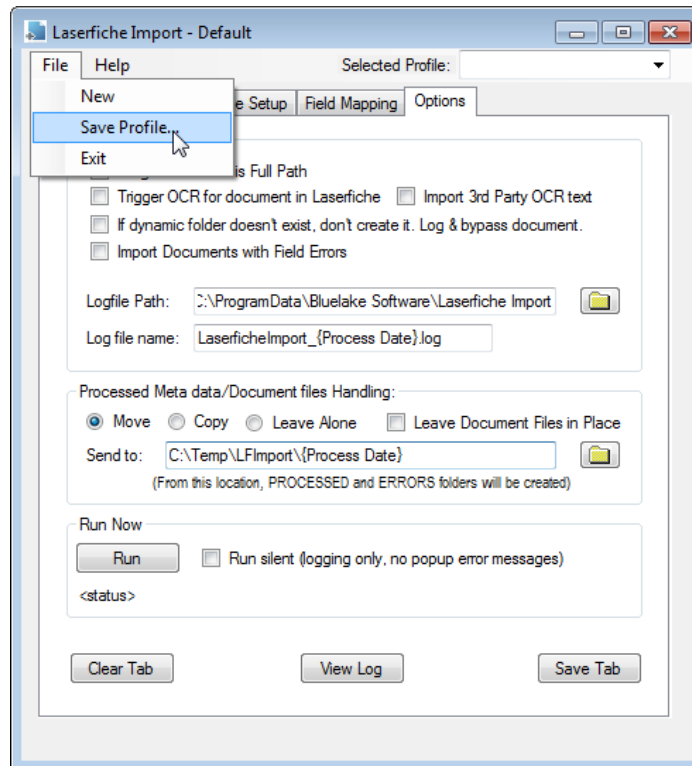
```

.....
6/24/2008 11:15:05 AM> Created Document (DocID: 14402) Name: Smith Debrief 5-18-05
6/24/2008 11:15:07 AM> Created Document (DocID: 14403) Name: Smith Debrief 8-10-05
6/24/2008 11:15:17 AM> Created Document (DocID: 14410) Name: Smith Debrief 11-17-04
6/24/2008 11:15:18 AM> Created Document (DocID: 14411) Name: Smith Debrief 11-24-03
6/24/2008 11:15:20 AM> Created Document (DocID: 14412) Name: Smith DWA 5-03-06
6/24/2008 11:15:21 AM> Created Document (DocID: 14413) Name: Smith 401K Changes Fax 4-21-04
6/24/2008 11:15:23 AM> Created Document (DocID: 14414) Name: Smith 401K Statement 8-20-04
6/24/2008 11:15:25 AM> Created Document (DocID: 14415) Name: Smith 401K Statement 11-17-04
6/24/2008 11:15:26 AM> Created Document (DocID: 14416) Name: Smith 401K Statement 11-29-05
6/24/2008 11:15:28 AM> Created Document (DocID: 14417) Name: Smith Address Change Ltr. 7-27-04
6/24/2008 11:15:30 AM> Created Document (DocID: 14418) Name: Smith Retirmnt Pln Fax 12-10-03
6/24/2008 11:15:32 AM> Created Document (DocID: 14419) Name: Smith Yoder Fax 4-09-04
6/24/2008 11:15:33 AM> Created Document (DocID: 14421) Name: Smith Address Change Ltr. 7-27-04
6/24/2008 11:15:35 AM> Created Document (DocID: 14422) Name: dbCams
6/24/2008 11:15:37 AM> Created Document (DocID: 14423) Name: 2005 Tax Returns
6/24/2008 11:15:39 AM> Created Document (DocID: 14424) Name: 2004 Tax Returns
6/24/2008 11:15:40 AM> Created Document (DocID: 14425) Name: Smith Family Trust
6/24/2008 11:15:42 AM> Created Document (DocID: 14426) Name: Kids Irrev. Tst
6/24/2008 11:15:44 AM> Processed file: E:\Backups\ReadyDoc\Stadjuhar Wealth Strategists\CFile1-convert.txt...
6/24/2008 11:15:44 AM> *****
6/24/2008 11:15:44 AM> ** Processing Complete. Summary:
6/24/2008 11:15:44 AM> ** Files Read: 1
6/24/2008 11:15:44 AM> ** Records Read: 33
6/24/2008 11:15:44 AM> ** Records Bypassed: 0
6/24/2008 11:15:44 AM> ** Fields Bypassed: 0
6/24/2008 11:15:44 AM> *****
  
```

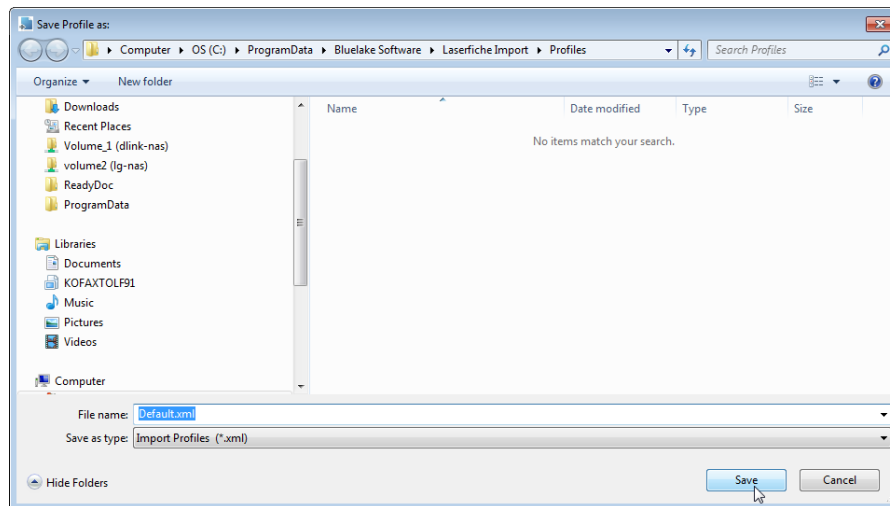
Final Configuration Task – Save the Settings as a Profile

The collection of settings provided on the 4 tabs must be saved into a “Profile”. The defined profile can then be selected through the interface the next time it is run, or it can also be specified when running Laserfiche Import as a scheduled task.

To Save a profile, select File, Save Profile, as shown below:

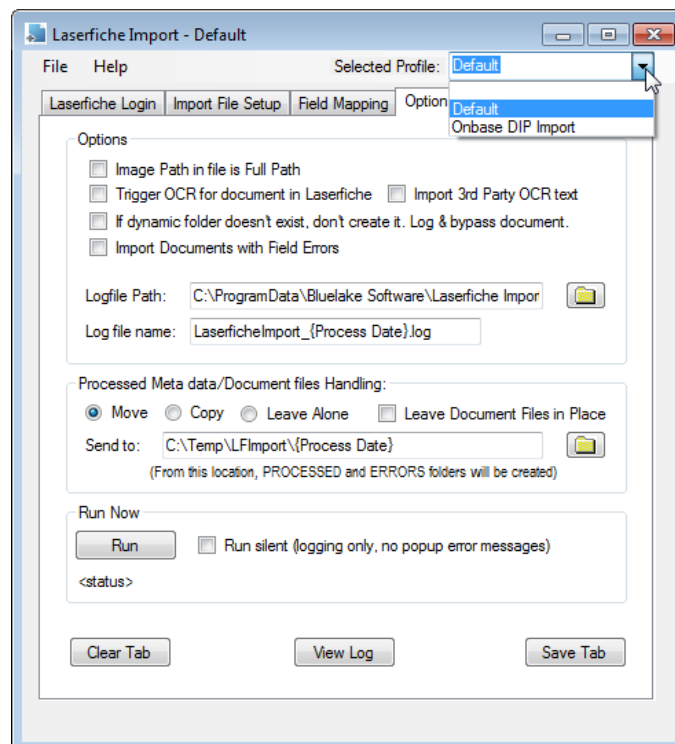


The location for profiles will be the installation directory (*i.e. Program Files\Bluelake Software\Laserfiche Import*) in a subdirectory called Profiles. The default name is 'default' but any name can be selected. There is no limit to the number of profiles that can be created and used.



Click Save to save the profile.

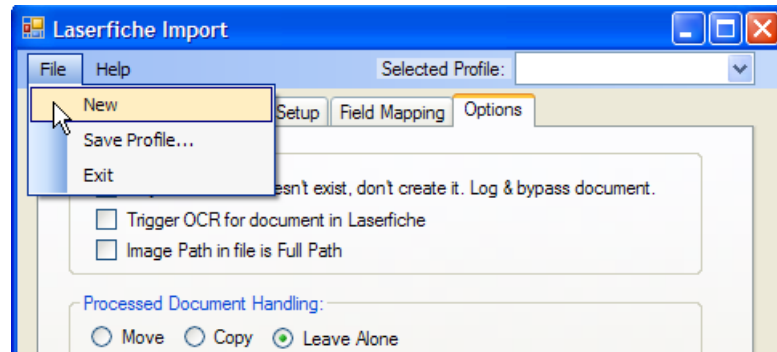
The next time the Laserfiche Import application is launched it will load the last Profile used. Other profiles can be selected by clicking on the "Selected Profile" dropdown list on the upper right of the application window:



Clearing out entries, creating new profiles:

There are several methods for clearing out existing configuration values and for creating new Profiles based on existing profiles.

1. Selecting *File, New* will clear the contents of all tabs and create a blank profile, the same as when the application was started for the first time.

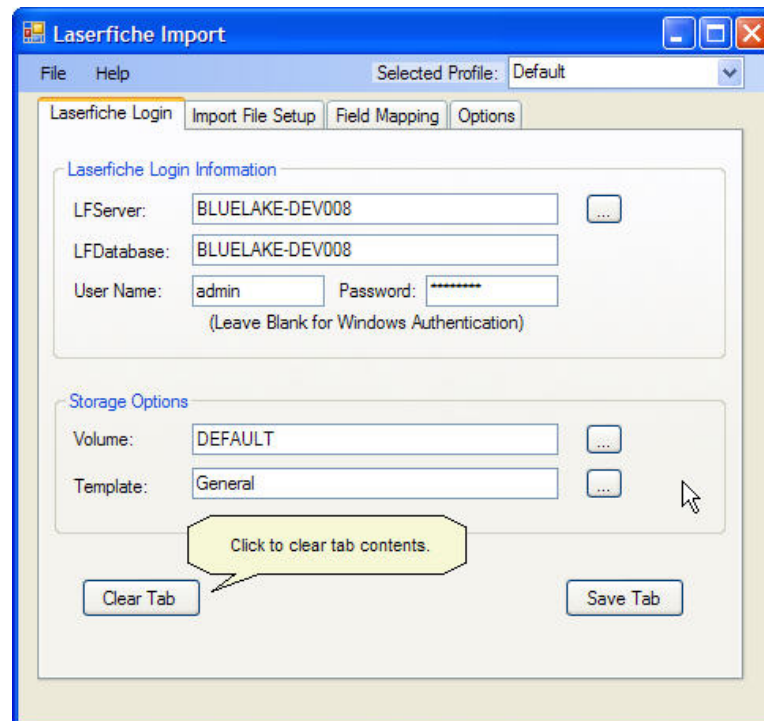


After providing settings on each of the tabs, you can then Save the Profile under a new name.

2. Clearing individual tabs:

Each of the individual tabs in the Laserfiche Import application has a “Clear Tab”

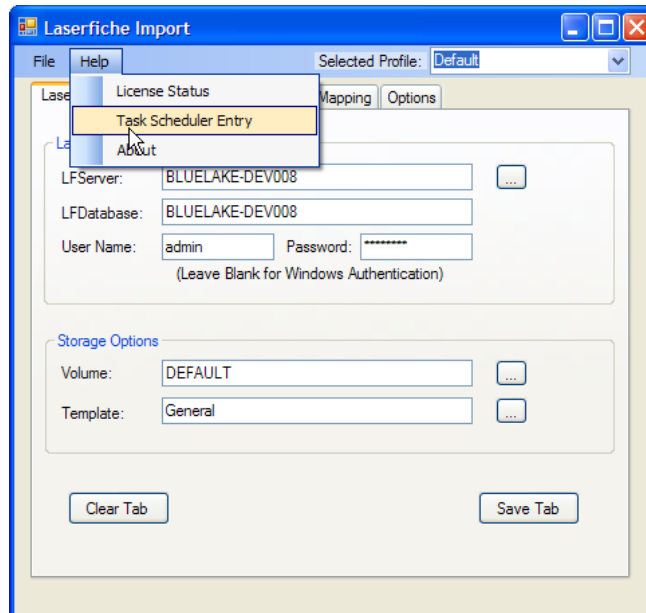
button. Clicking this button will clear the contents of the immediate tab, as well as the underlying Profile fields that are associated with that tab.



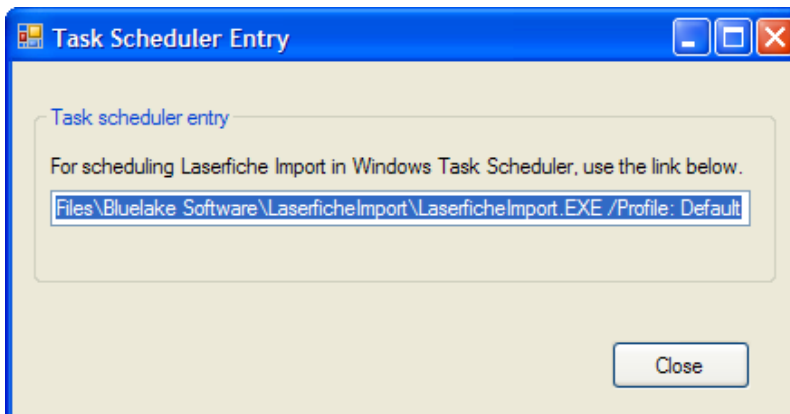
Running Laserfiche Import as a scheduled Task:

Once configured with at least one profile, Laserfiche Import can be run as a scheduled task under Windows (control panel) Task Scheduler.

The correct path and information to provide can be found by clicking Help, Task Scheduler Entry as shown below:

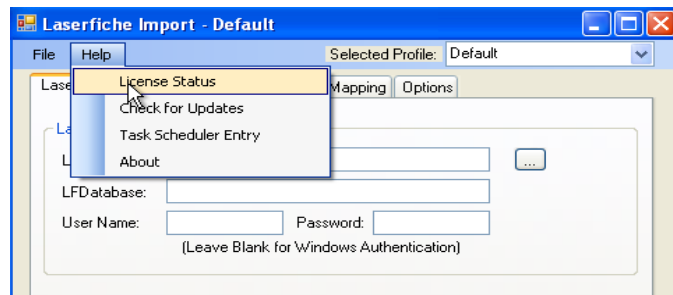


Copy and paste the entire entry (example below) into Task Scheduler:

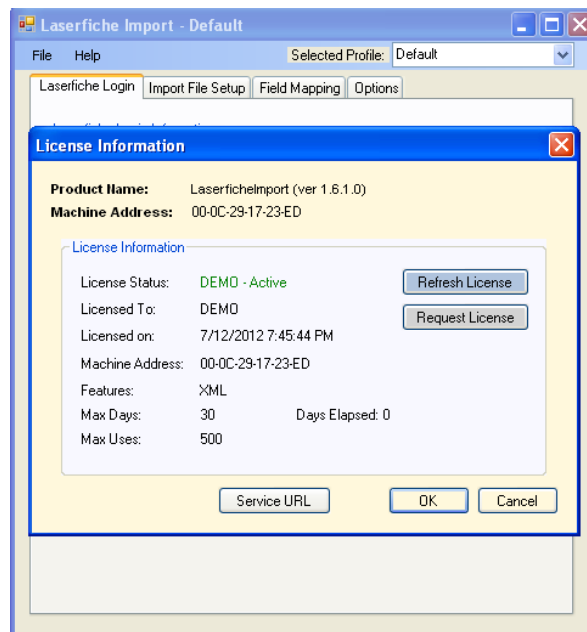


Product Licensing:

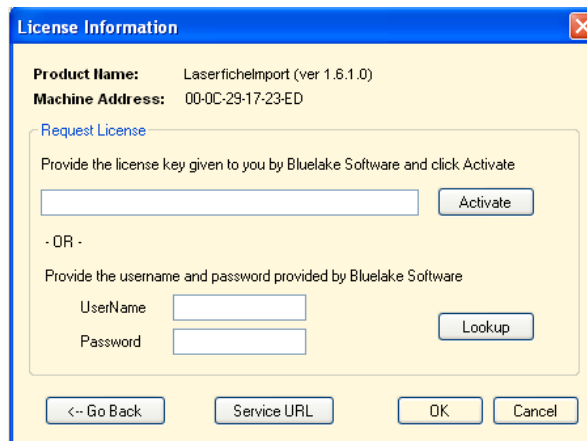
When first installed, Laserfiche Import is granted a 30 day, 500 document demonstration license. After install, to view the license status, select Help, License Status, as shown below:



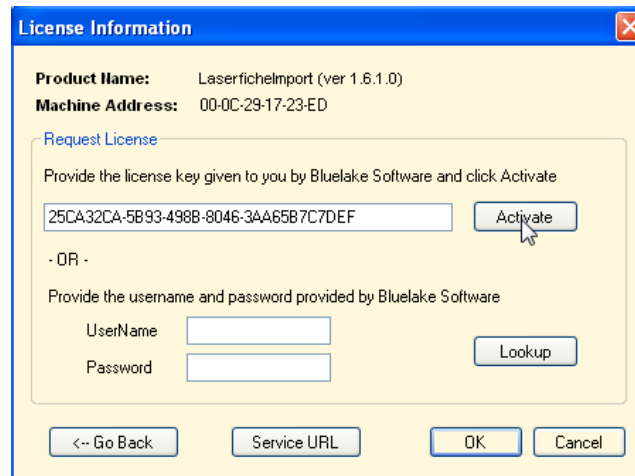
The license information will be shown, as depicted below:



To extend the demo license or to convert to a permanent license, please contact Bluelake for a license code. Upon receipt of the license code, click on “Request License” from the License Information window and the Request License window will appear as shown below:



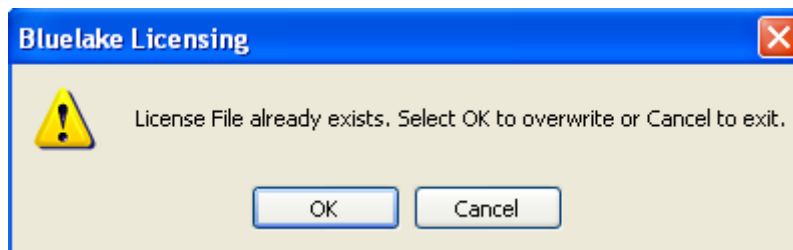
Paste the license code into the Activation box and click “Activate”:



The "License Information" dialog box displays the following information and options:

- Product Name:** LaserficheImport (ver 1.6.1.0)
- Machine Address:** 00-0C-29-17-23-ED
- Request License** section:
 - Instruction: "Provide the license key given to you by Bluelake Software and click Activate"
 - License key input field: 25CA32CA-5893-498B-8046-3AA65B7C7DEF
 - Activate button
 - Separator: - OR -
 - Instruction: "Provide the username and password provided by Bluelake Software"
 - Username input field
 - Password input field
 - Lookup button
- Bottom buttons: <- Go Back, Service URL, OK, Cancel

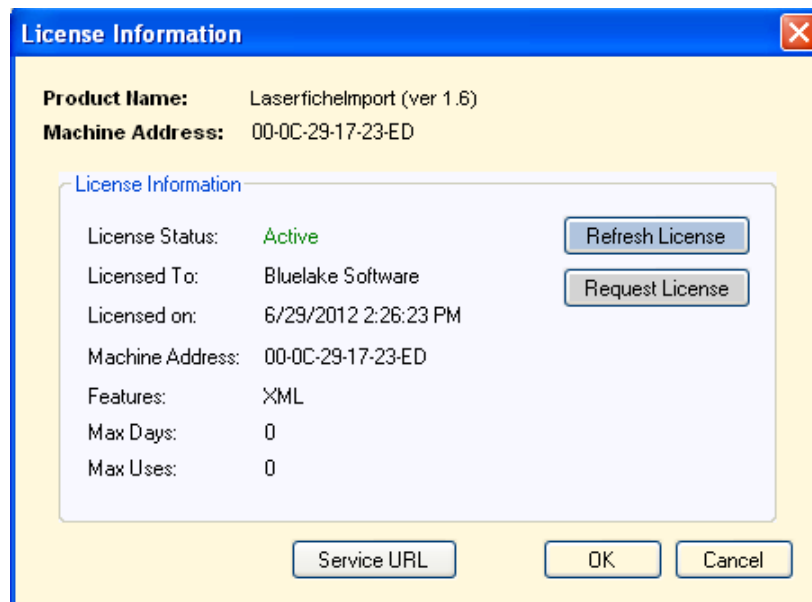
Click OK to overwrite the existing (demo) license file with the updated license file:



The "Bluelake Licensing" dialog box displays a warning message:

- Warning icon: A yellow triangle with an exclamation mark.
- Message: "License File already exists. Select OK to overwrite or Cancel to exit."
- Buttons: OK, Cancel

You should then receive the “License File Created Successfully” message and the updated license will display.



The "License Information" dialog box displays the following information and options:

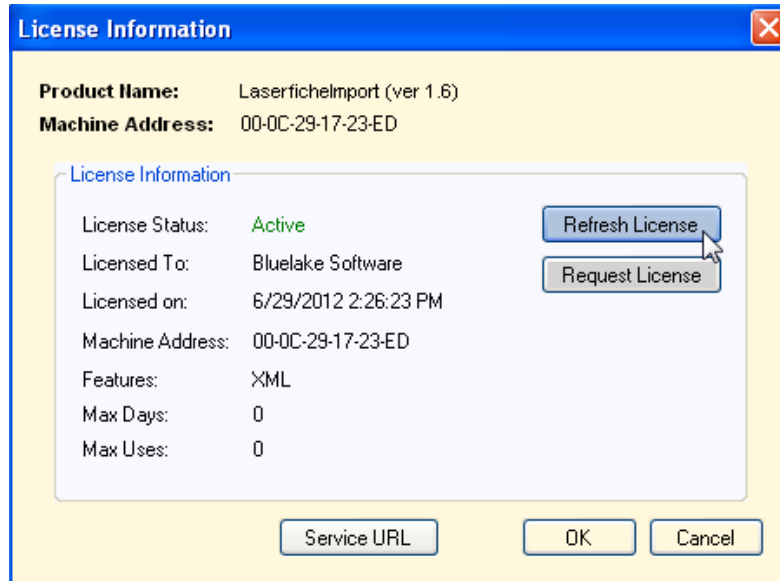
- Product Name:** LaserficheImport (ver 1.6)
- Machine Address:** 00-0C-29-17-23-ED
- License Information** section:
 - License Status: Active
 - Licensed To: Bluelake Software
 - Licensed on: 6/29/2012 2:26:23 PM
 - Machine Address: 00-0C-29-17-23-ED
 - Features: XML
 - Max Days: 0
 - Max Uses: 0
- Buttons: Refresh License, Request License, Service URL, OK, Cancel

Refreshing the license

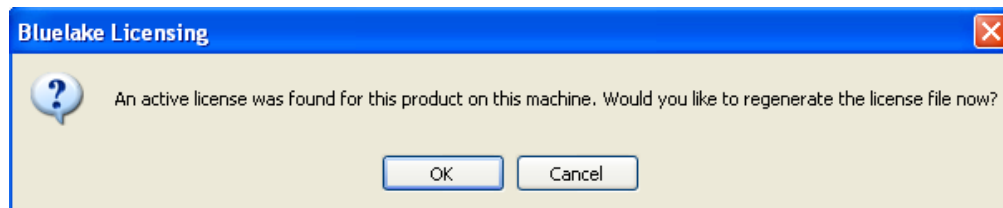
Occasionally, license files can become corrupted, or it may be necessary to rebuild or re-image the machine on which Laserfiche Import is installed, requiring a re-installation of

Laserfiche Import. As long as the machine MAC address upon which licensing was based has not changed, the original license can be restored from the Bluelake License Server.

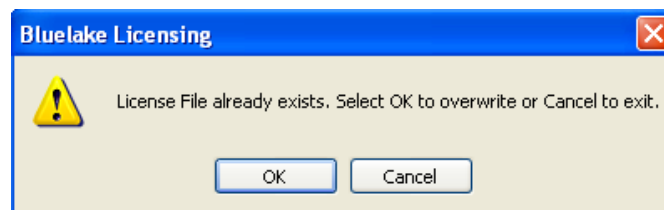
To restore or refresh the product license, click on the Refresh License button.



Click OK to regenerate the license file:



Click OK to overwrite any existing license file with the updated license file:

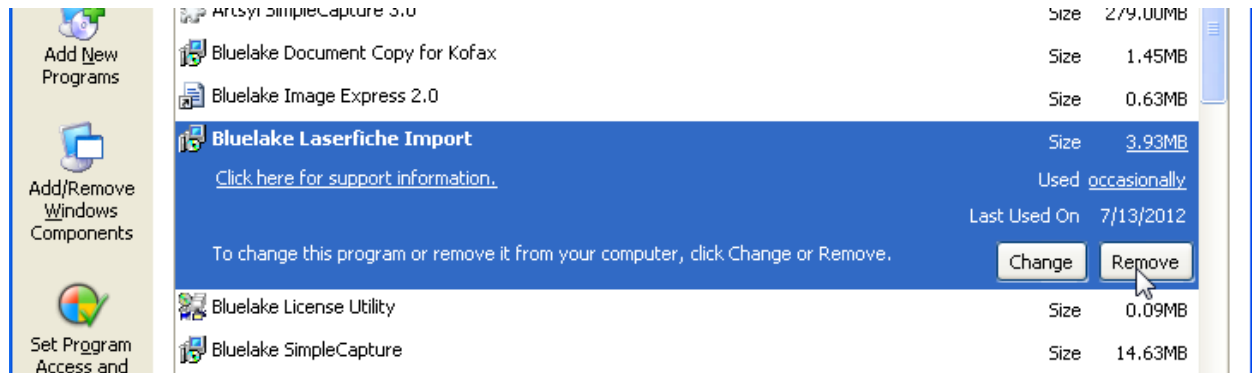


You should then receive the "License File Created Successfully" message and the updated license will display.

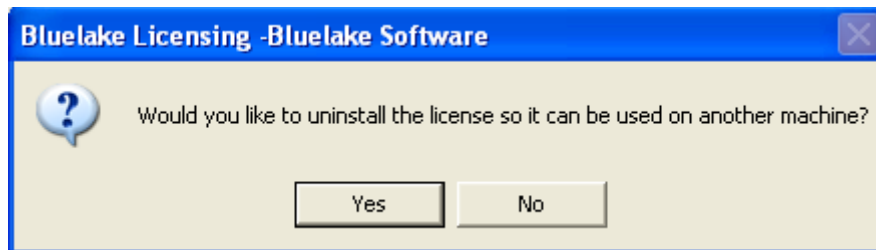


Moving the Product License

It is possible to move an existing product license from one machine to another. To do so, invoke uninstall of Laserfiche Import from Add/Remove Programs.

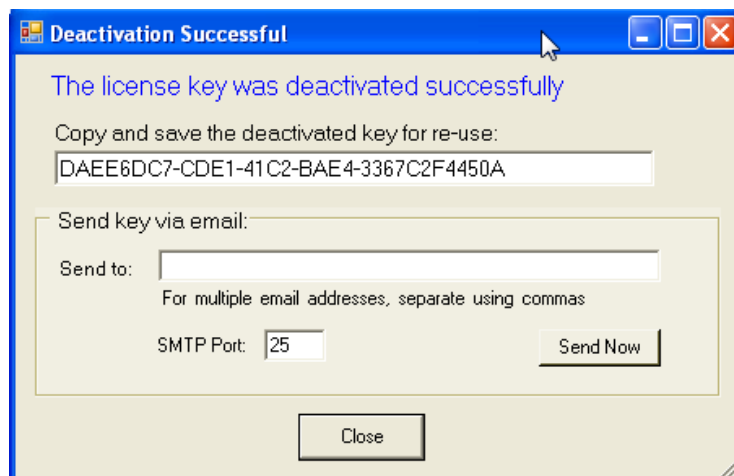


At the end of the uninstall if a valid, permanent license is found on the machine, a prompt will appear regarding uninstalling the license.



If the license will continue to be used on the same machine (i.e. after an uninstall/reinstall sequence), select NO to the prompt above. If the license needs to be moved to a different machine, select YES.

If YES was selected, after a few moments, the deactivation window will display as shown below. Note the deactivation key – this code can be used to Activate the license on another machine:



Optionally, provide one or more email addresses and click "Send Now" to receive the activation code via email.