

**Laserfiche<sup>®</sup>**

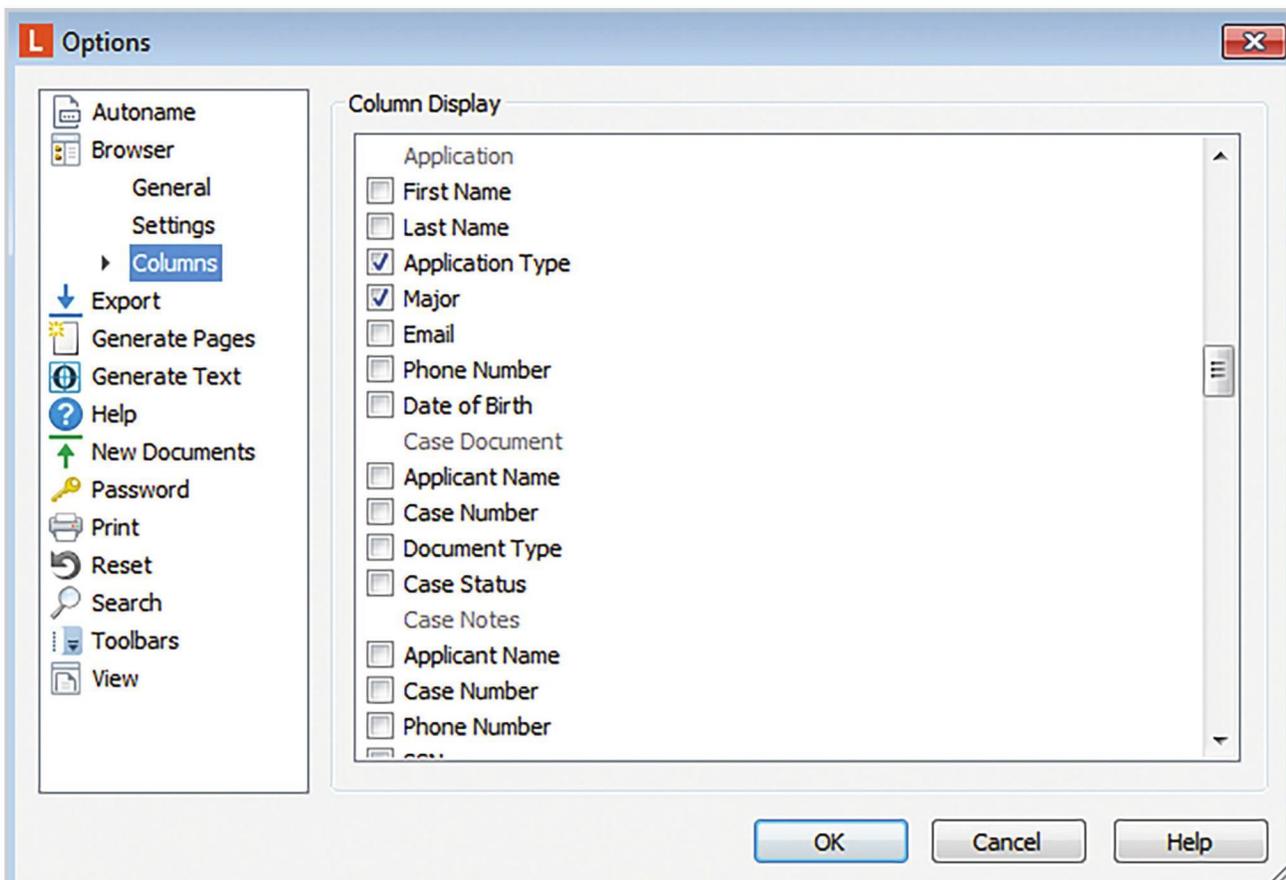
# Tips & Tricks



## Customize the Column View

The Laserfiche Windows and web clients allow you to customize your column display for each folder by creating and saving column profiles. Once created, a user can switch between them easily.

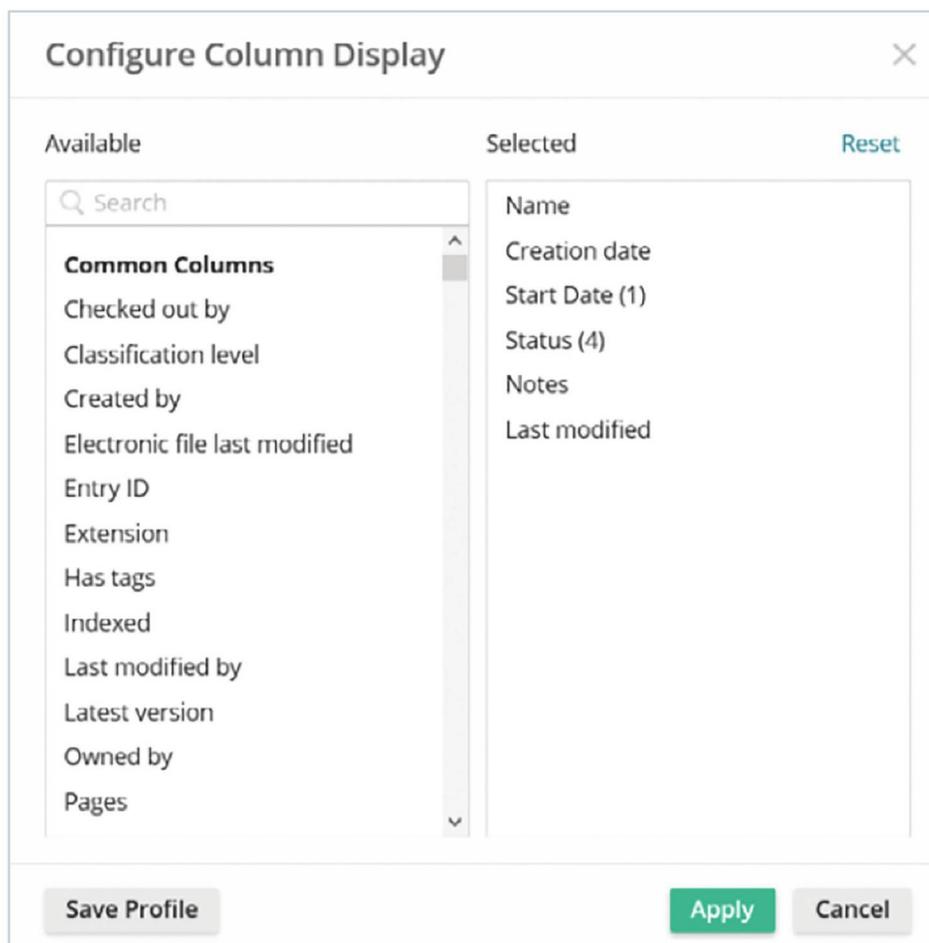
In the Windows client, open the folder where you store the documents, right-click anywhere in the column headers and select More. You will notice that some of the columns will be checked already. Scroll down the list and uncheck the columns you do not want, and check the columns you want to view. Click OK.



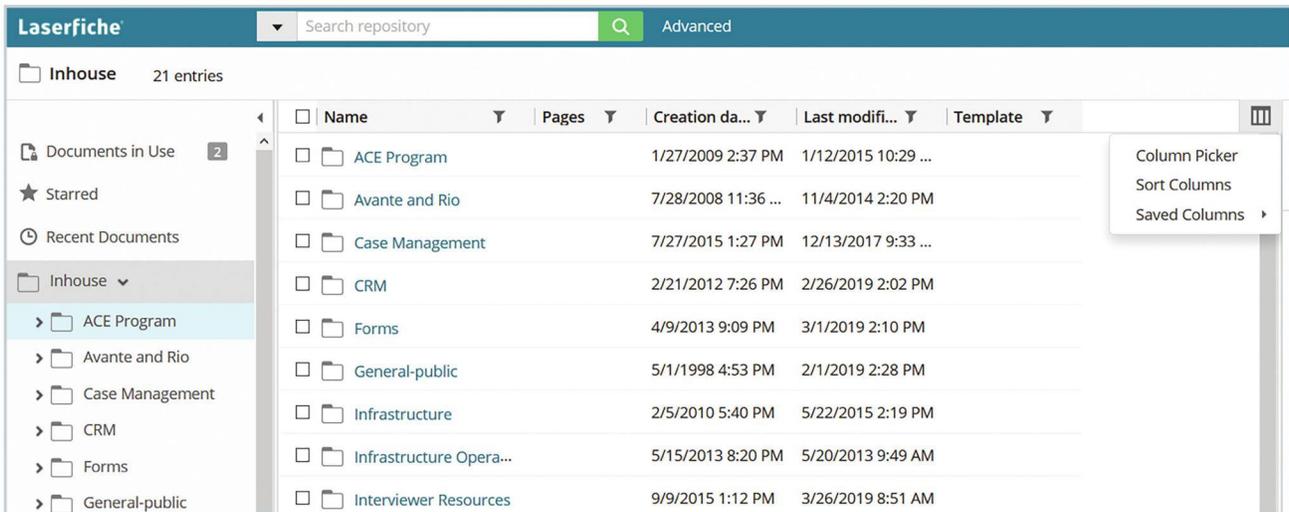
*The column picker in the Windows client*

To save this column profile, right-click in the column header and select Load/Save Columns – Save. Name the column profile and click OK. Your profile has been saved.

In the web client, click on Change Column Display button and select Column Picker. Add or remove your columns and click Save Profile. You can also get to the Configure Column Display menu by right-clicking on the column headers and selecting the Column Picker.



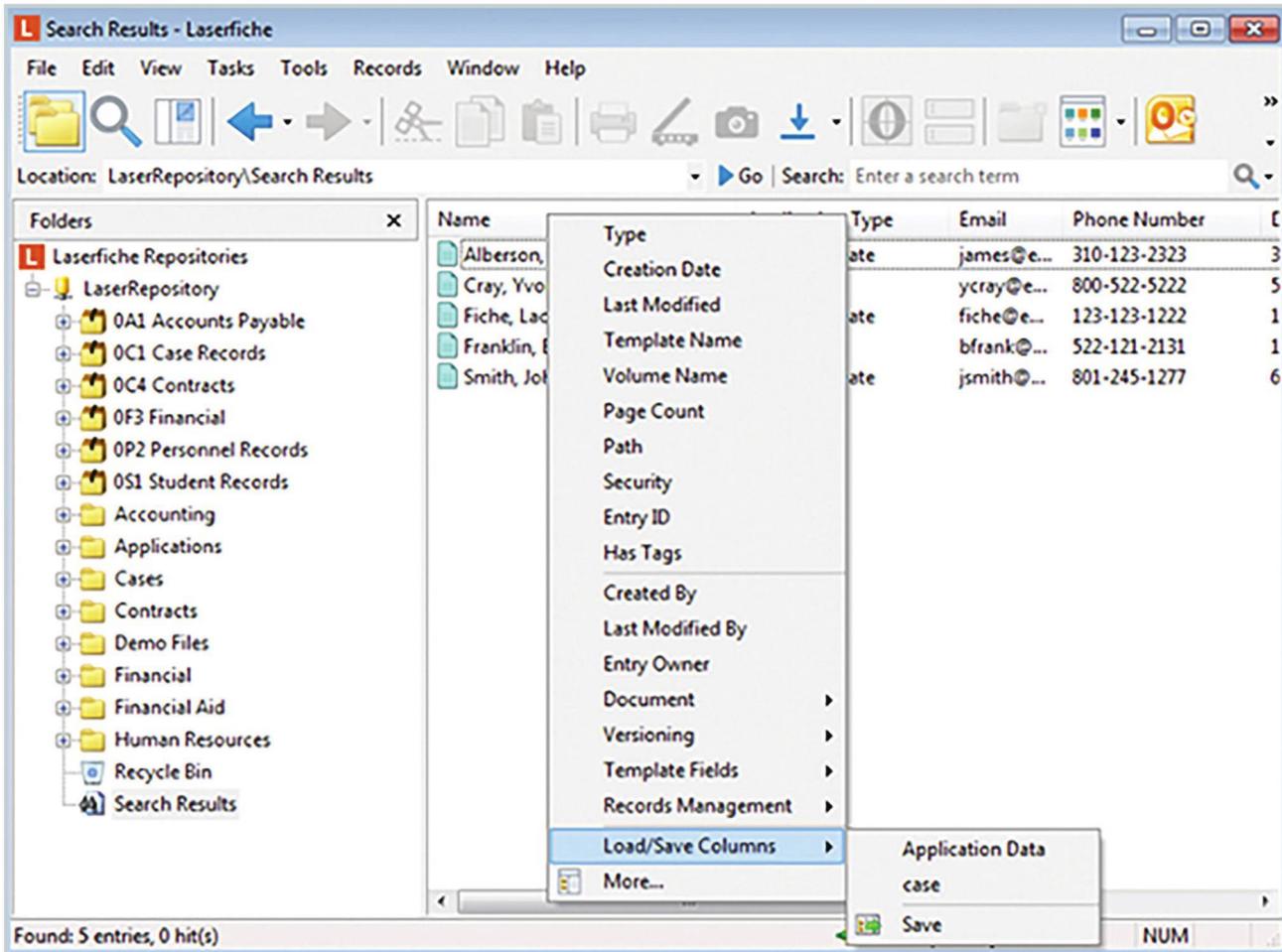
*The column picker in the web client*



*The Change Column Display button in the web client*

Follow the same directions for creating another column profile.

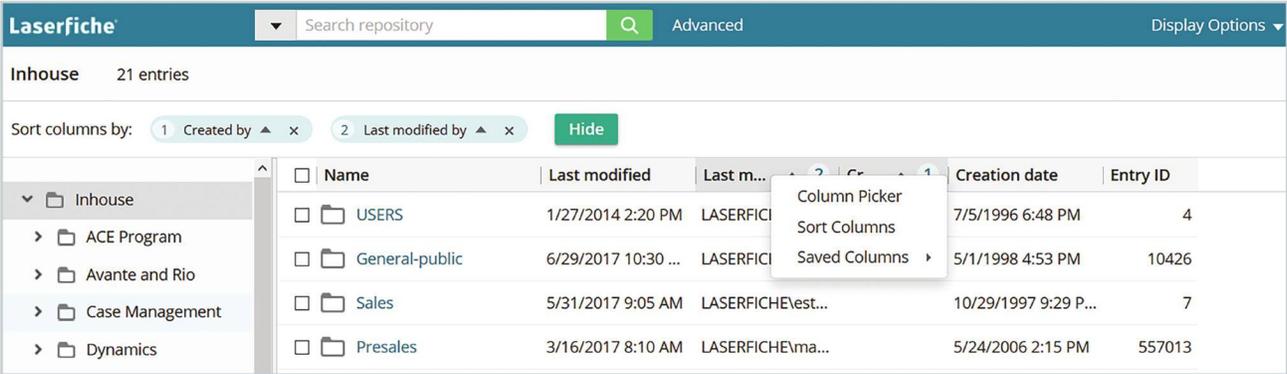
After saving it, you'll be able to quickly switch between column views by right-clicking in the column headers and selecting Load/Save Columns along with the name of your profile (in the Windows client) and Saved Columns along with the name of your profile (in the web client).



Loading a saved column profile in the Windows client

You can also load a column profile in the web client by clicking on Change Column Display button and selecting Saved Columns. From there, select the column profile that you would like to use. Additionally in the web client, you can set a default column sort order by clicking on Sort Columns from the Change Column Display menu.

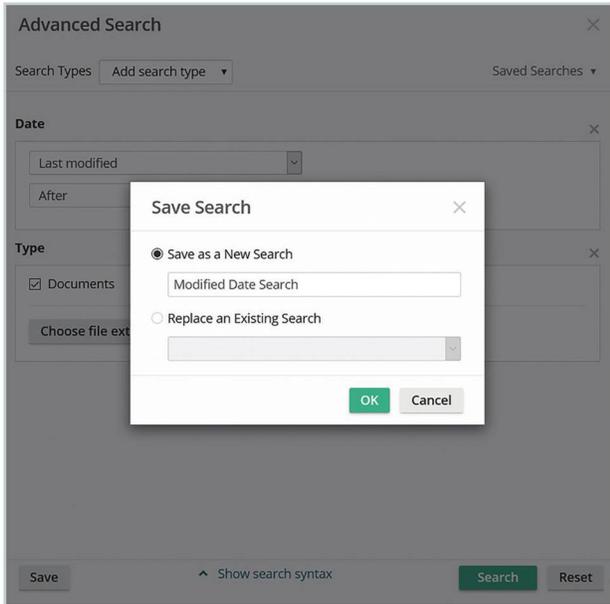
You can also sort by more than one column by right-clicking in the column headers, selecting Sort Columns and clicking on the various column headers.



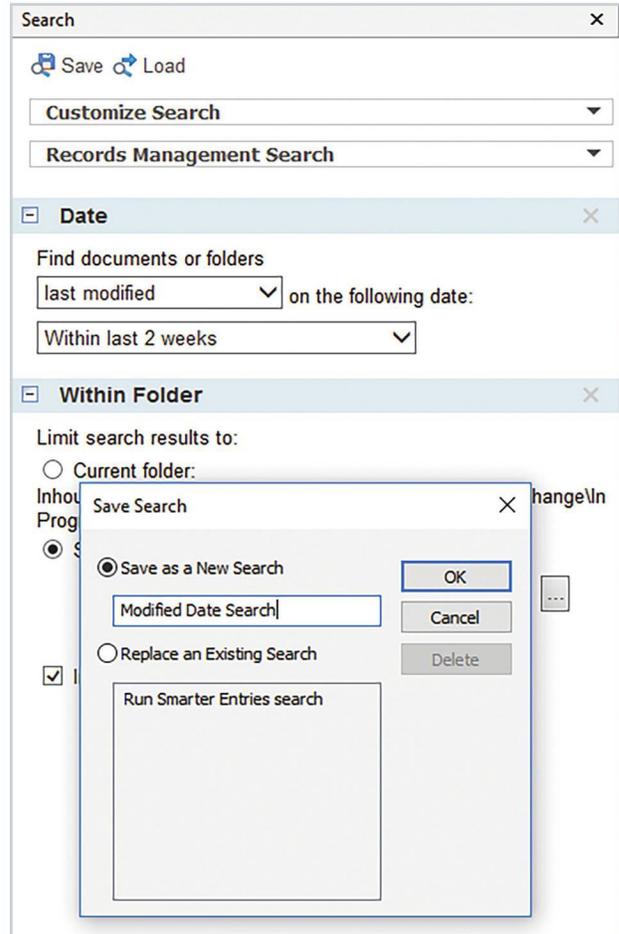
*Configuring a multi-column sort in the web client*

## Save a Search

If you perform the same search regularly, you can save it as a Saved Search. This search will then be accessible from within the Saved Searches menu in the Advanced Search window.

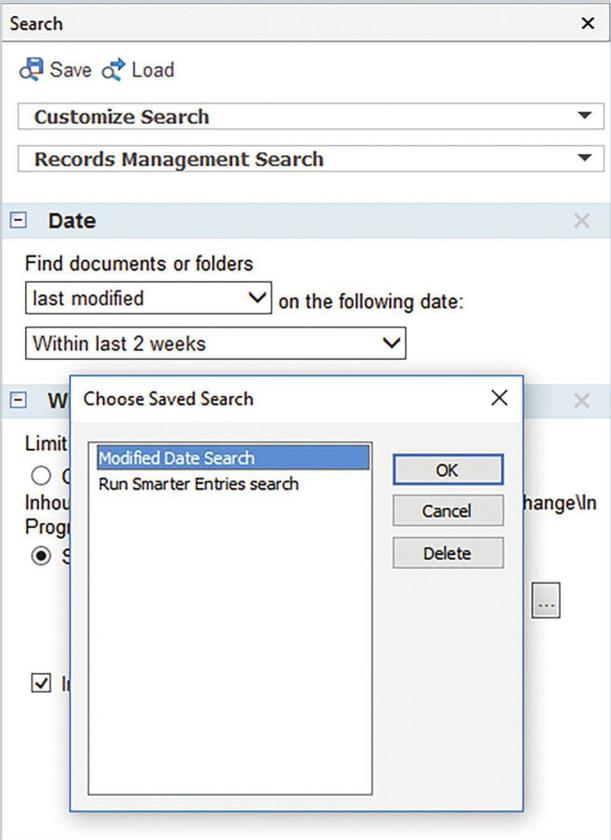


*Saving a search in the web client*



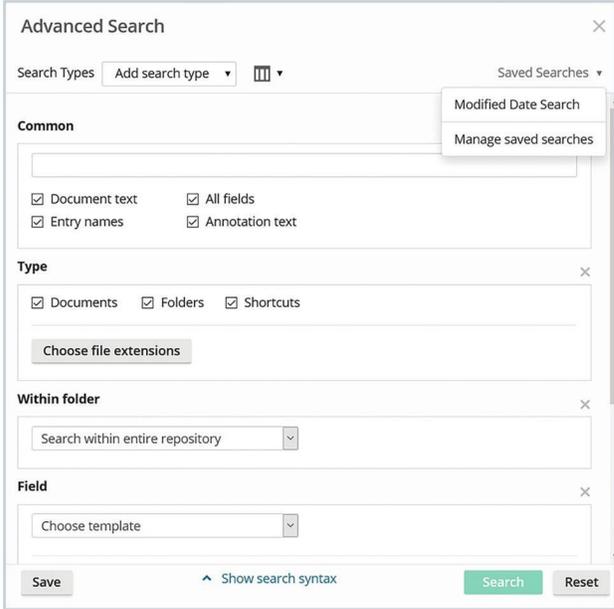
*Saving a search in the Windows client*

To run a saved search in the Windows client, open the search tab and click on Load. Then select the saved search.



Loading a saved search in the Windows client

In the web client, click on the Advanced search button at the top of the browser window. Then select Saved Searches.



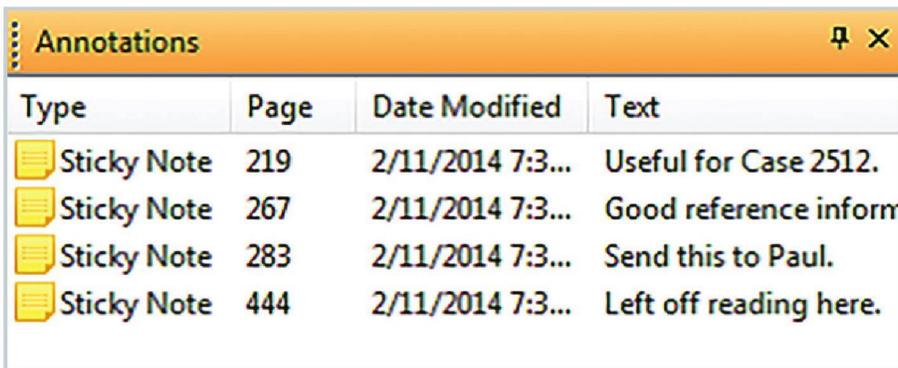
Loading a saved search in the web client

Note that any saved searches created with the Windows client will not be available in the web client, and vice versa. If you want to use the same saved search in both clients, you will have to create it in each client separately.

## Bookmark Pages in a Document

When working within large documents, it can be useful to leave a bookmark so that you remember where you found a particular piece of information, or so that you know where you left off working. In Laserfiche, you can use annotations and the Annotations pane as a bookmark list.

For example, you might add a sticky note to signal where you stopped reading so that you begin there the next day. You can then display the Annotations pane and jump immediately to the location that you need by double-clicking on the annotation. You can even display the sticky note text in the pane to distinguish one bookmark from another. If you do not want to display your bookmarks to other users, you can make them private.



Type	Page	Date Modified	Text
Sticky Note	219	2/11/2014 7:3...	Useful for Case 2512.
Sticky Note	267	2/11/2014 7:3...	Good reference inform
Sticky Note	283	2/11/2014 7:3...	Send this to Paul.
Sticky Note	444	2/11/2014 7:3...	Left off reading here.

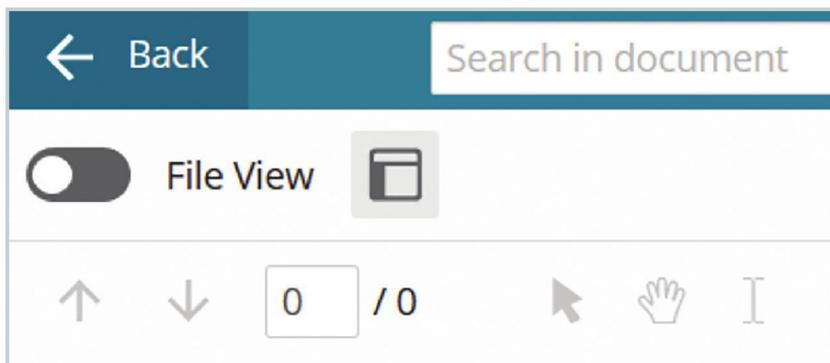
*Annotations used as bookmarks in the Windows client*

## Customize the Document Viewer

You can rearrange the panes in the Laserfiche Windows client Document Viewer, allowing you to close panes that you do not want to use, open panes that you do, and drag and drop panes to different locations. You can also stack panes on top of one another so that they are accessible via tabs, or pin/unpin panes so that they open when you need them and slide out of sight when you do not. In addition, once you have set the panes in the configuration you want, you can lock the pane display to avoid accidentally moving a pane.

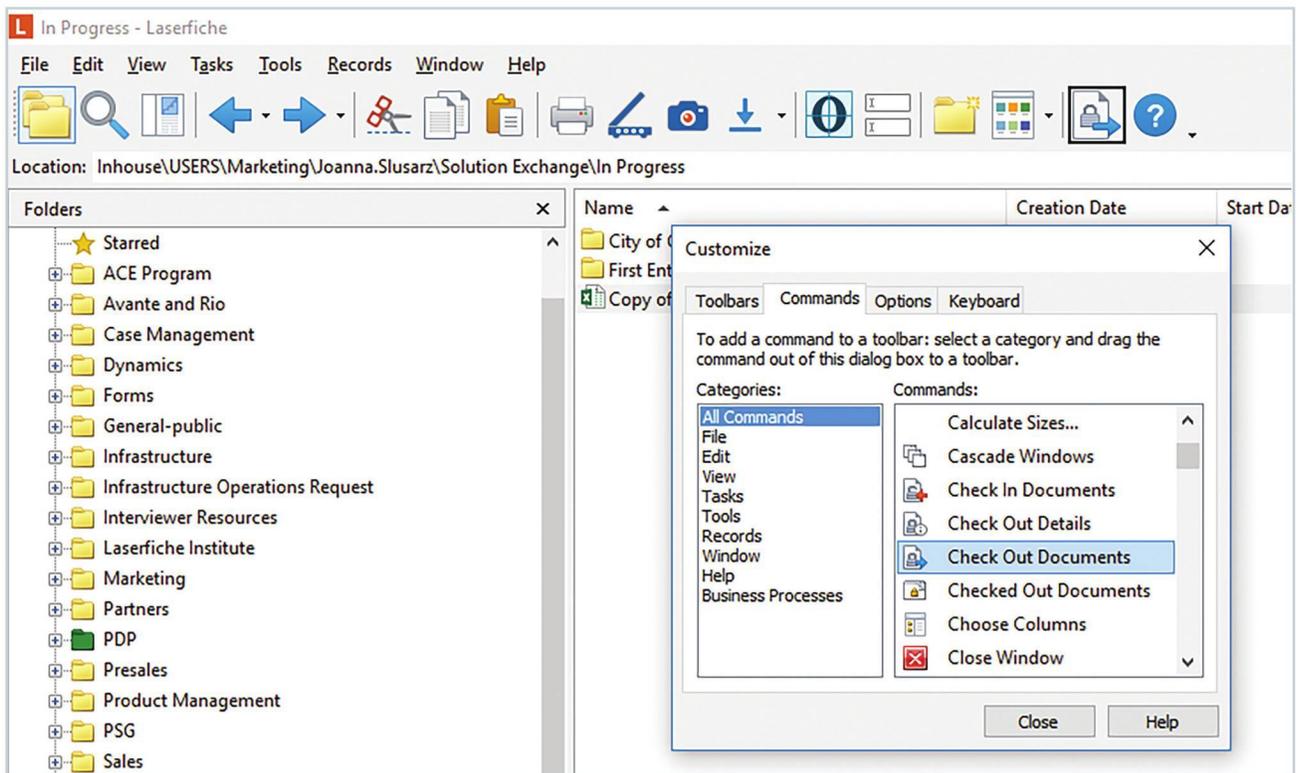
If you do accidentally move a pane, or rearrange your panes and later decide that you are not happy with them, you can quickly reset your pane layout to the default by closing all of the open panes. Once the last pane has been closed, the Document Viewer will give you the option to return to the default.

To modify the configuration of Document Viewer panes in the web client, click on the Toggle Panes button. From there, you can toggle through the different pane options.



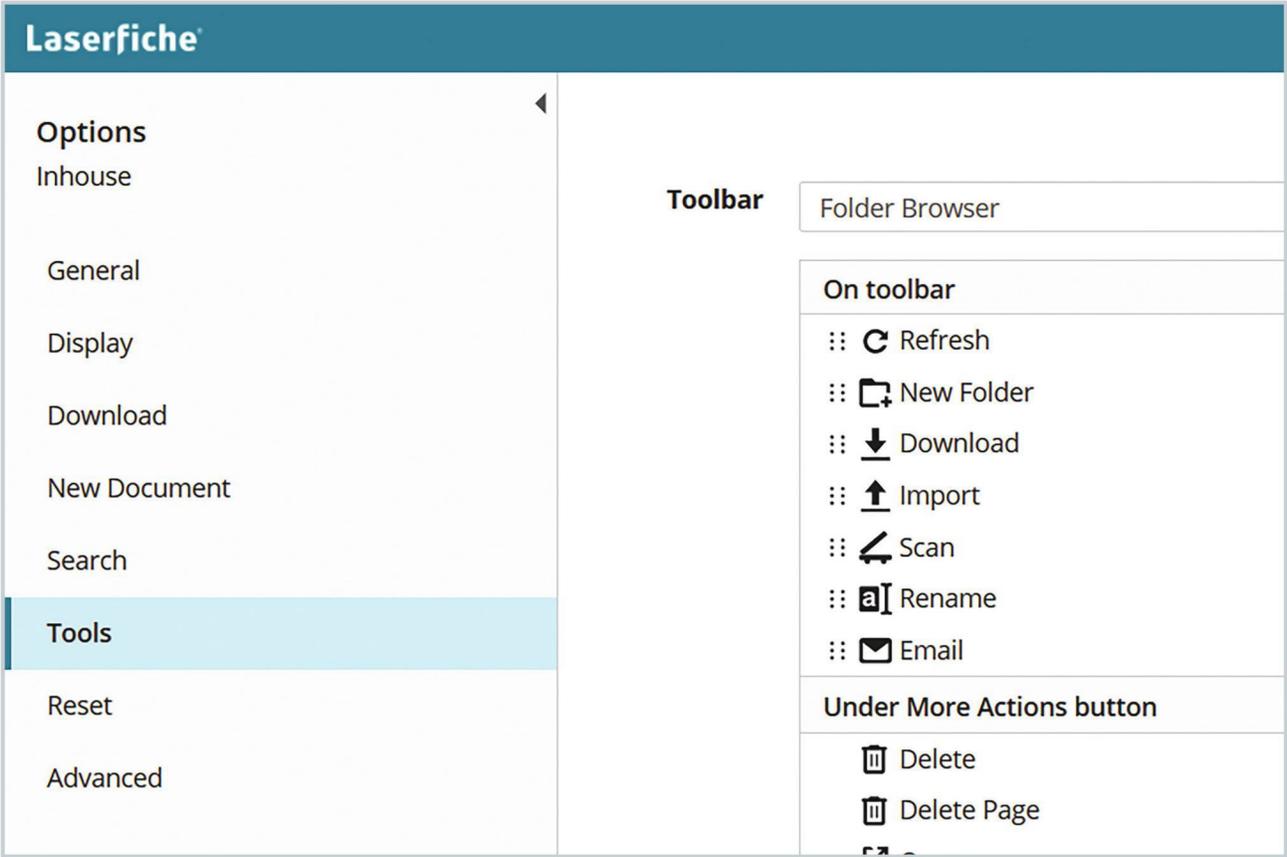
*Clicking the Toggle Panes button toggles through the different pane options*

You can customize your Laserfiche Windows client toolbar by adding or removing buttons. For example, if you check out electronic documents frequently you can add the Check Out document button to your toolbar. Simply right-click the toolbar and click Customize. Select the buttons you want to add and drop them onto the toolbar.



*Customizing the toolbar in the Windows client*

To customize the web client toolbar, navigate to the Tools section in the Options menu (found when clicking on your user name in the upper right corner of the Folder Browser). Drag the options you want to display to the "On toolbar" list and drag the options you do not want to display to the "Under More Actions" button list.



Customizing the toolbar in the web client

## Zoom In On a Portion of the Document

When working in an imaged document in the Windows client, you can quickly select sections of a document. Simply click on the document's page and drag the cursor to create a lasso encompassing the part of the image you want to select. By default, as soon as you release the mouse button the Document Viewer will zoom in on the selected portion of the image. If you want to select a section of the image without zooming, you can hold down CTRL as you select.

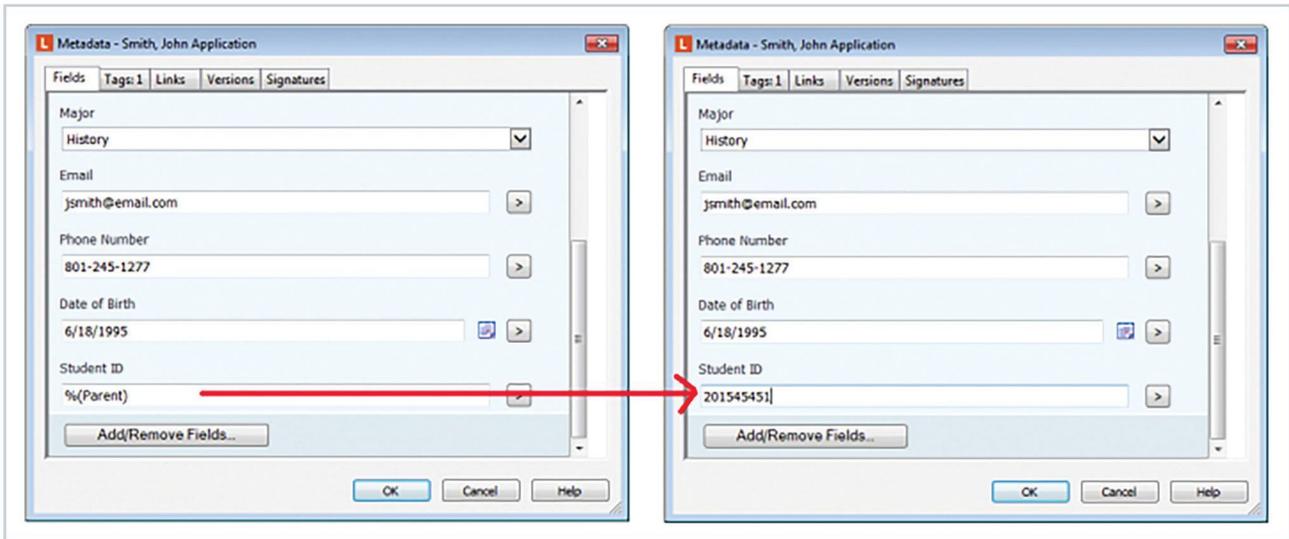
In the web client, you can click the magnifying glass icon in the document's tool bar and then click a portion of the document to zoom in on that particular section.

## Simplify Metadata Entry

In order to simplify the process of manually filling out metadata, you can add the **%(Parent)** token inside a field to automatically pull information from the parent folder's template.

Example: Once a graduate or undergraduate application is reviewed, it is moved to the Student Records folder where a subfolder is created for each applicant. A Student ID is then automatically generated and inserted in the folder's template Student ID field. In order to simplify populating the Student ID in the application document's template, you can set the default value of this field to the **%(Parent)** token.

This way, the next time you view the document's metadata, it will be filled with the Student ID pulled from the folder's template.

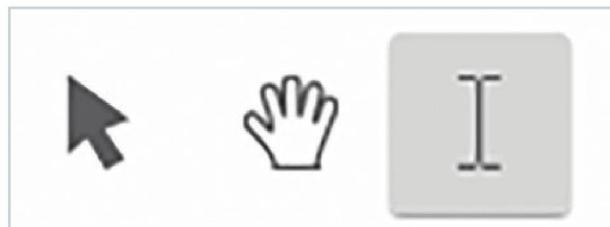


*Using the field data inheritance token in the Windows client*

In the Windows client, you can also select a portion of your image using the text lasso, and drag and drop that selection into the fields of a document. (You will need to make sure that you are selecting the image without zooming, either by holding down CTRL or by changing the default behavior in Options.) This will copy the text from the selected portion of the image into the field.

For instance, if your document contains a customer name, and you need to fill out a customer name field, you do not need to retype the field value. Instead, you can select the portion of the document that contains the customer name, then drag and drop it into the Customer Name field. This allows you to take advantage of existing text, rather than having to re-input it by hand.

The web client has a separate select text button in the toolbar. This allows you to select a portion of the document's text, automatically copying it to your computer's clipboard. Simply paste the text in the appropriate field.



*The select text button in the web client Document Viewer*

Dragging and dropping, or selecting text from the image only works if there is text associated with the image. If the document has not been OCR'd, you will not be able to use this feature.

**Laserfiche®**

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