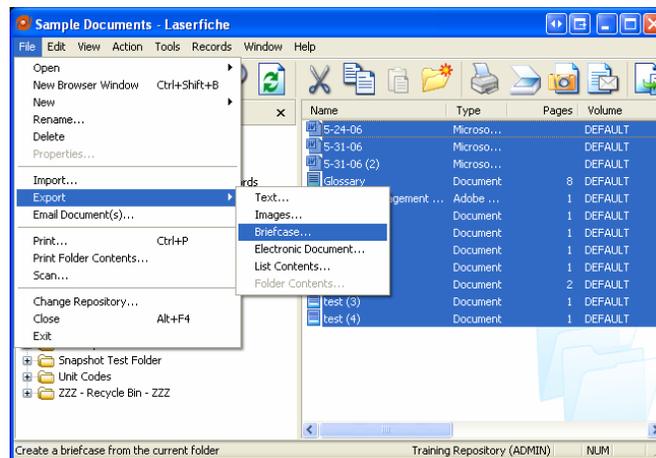


Laserfiche Briefcases

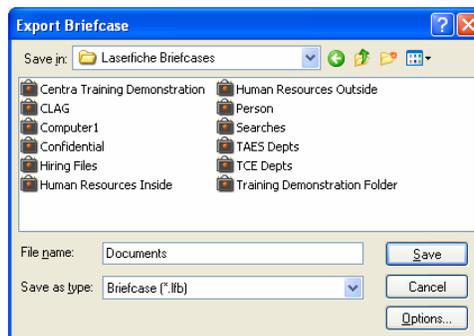
Laserfiche Briefcases are containers used within the Document Management system that package entries for ease of movement from one location to another. They can contain images, electronic documents, associated text files, template information, supplemental markings and any associated file structure that is saved within the Briefcase.

There are two main uses of the Laserfiche Briefcase that we will discuss. The first is the ability of Laserfiche Briefcases to “export” a grouping of documents and/or folders out of the repository. This Briefcase can then be “imported” into another repository. Since there is currently only one production repository, there will be very limited need to use briefcases out of one Laserfiche repository and into another, but suffice it to say that the Laserfiche Briefcase is the easiest method to accomplish this task. The steps to perform such a function are shown below:

The desired set of documents or section of the folder area should first be highlighted. Next, choose File>Export>Briefcase as shown below.

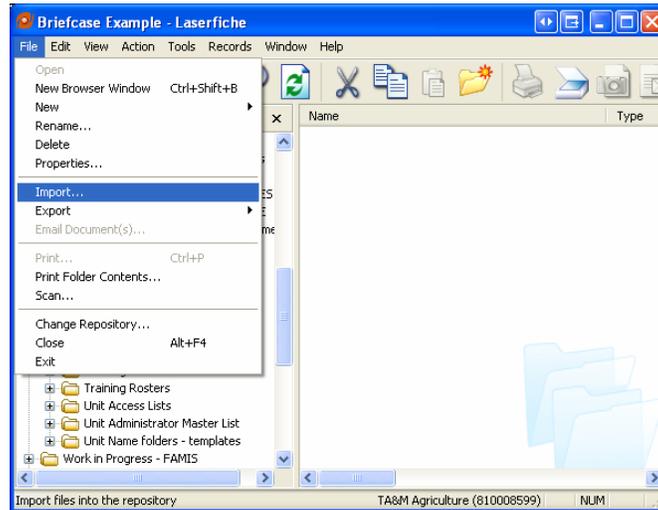


The following dialog box will appear requesting you to select a location to save the Laserfiche Briefcase to. Select the location on your workstation or any accessible network drive and title the Briefcase appropriately. The only option for “Save as type:” is as Briefcase (*.lfb). Click “Save” to save the Briefcase to the desired location.

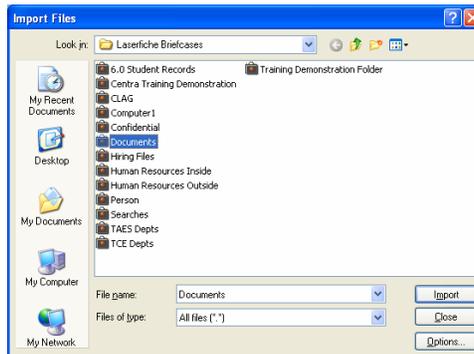


If we have saved the contents for use in another Laserfiche repository, then we must next “import” the Briefcase to the desired repository. The process is described in the following steps.

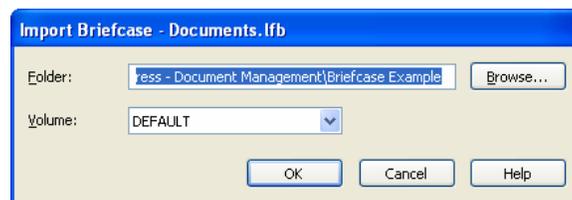
When logged into the appropriate repository, choose the location that you wish to import the images and/or associated folder structure. When at that location choose File>Import.



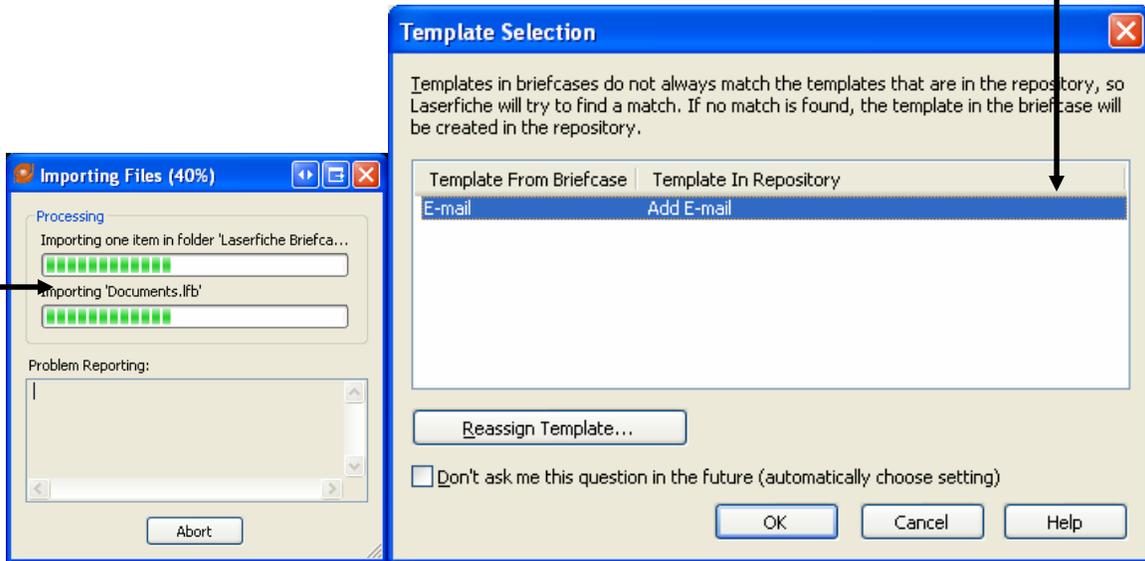
The following dialog box will appear asking that you browse to the location of the item you wish to import. Browse to the location that you have saved the Laserfiche Briefcase that you wish to import. Click on “Import”.



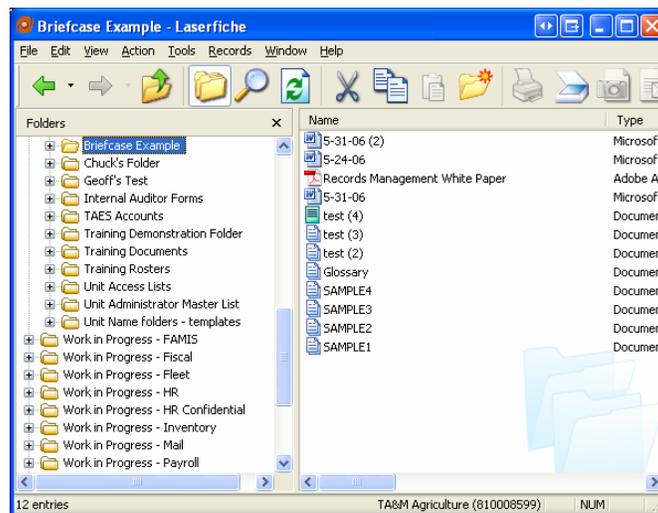
The following dialog box will appear asking you to confirm the location you are seeking to import to. Confirm by clicking “OK”.



The following status box will appear showing that the import is in progress. Since template information might be contained in the Briefcase, it will confirm to either match the template in the Laserfiche Briefcase with a similarly named template in the destination repository, or will ask to add the template to the destination repository. Click on “OK” to finalize the import.

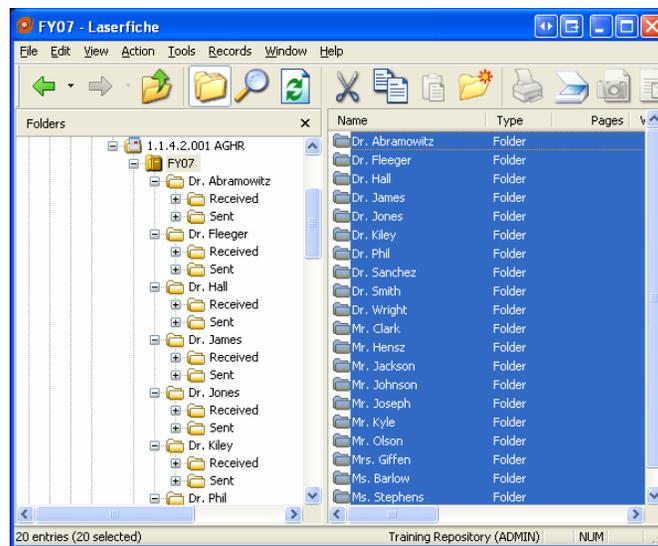


The documents previously exported from the 1st repository are now brought into the 2nd repository for use.

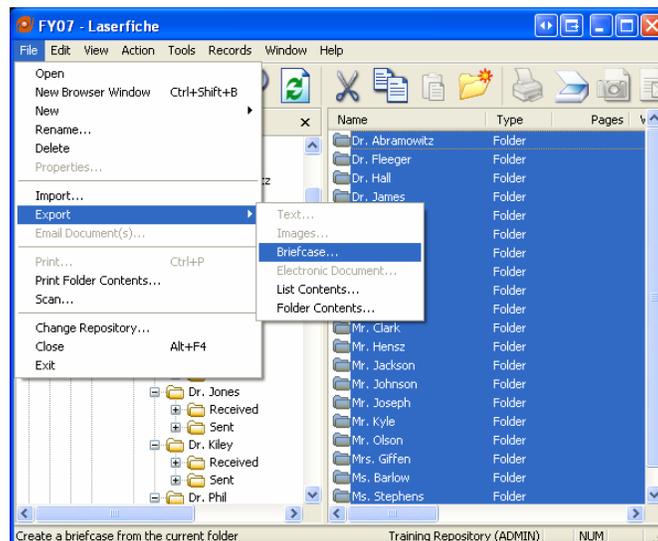


NOTE: If the items exported into a Laserfiche Briefcase contain either Record Series or Record Folders (Laserfiche containers with special Records Management properties and settings) they are only created as “regular” manila folders, such as in a Windows Explorer environment. ******

The second and much more common use of Laserfiche Briefcase capabilities is in the creating, exporting and re-creating of a particular folder structure for your use in filing of documents in the Laserfiche production repository. For example, suppose that you are going to file correspondence by recipient, and you have an office with multiple persons working in it. As you would move from one fiscal year for filing to the next fiscal year, you could take time and re-create the same folder structure each year. Alternatively, you could use a Laserfiche Briefcase to act as a template and re-create your folder structure each year. This would involve repetitious data entry, leaves multiple possible points of error and consumes a lot of time depending on the complexity of the folder structure. To begin, highlight the folder structure that you wish to export as a Laserfiche Briefcase and use again in the future. Note that each of the selected folders also contains 2 nested sub-folders. To re-create this folder structure manually would require making and naming 60 folders total.



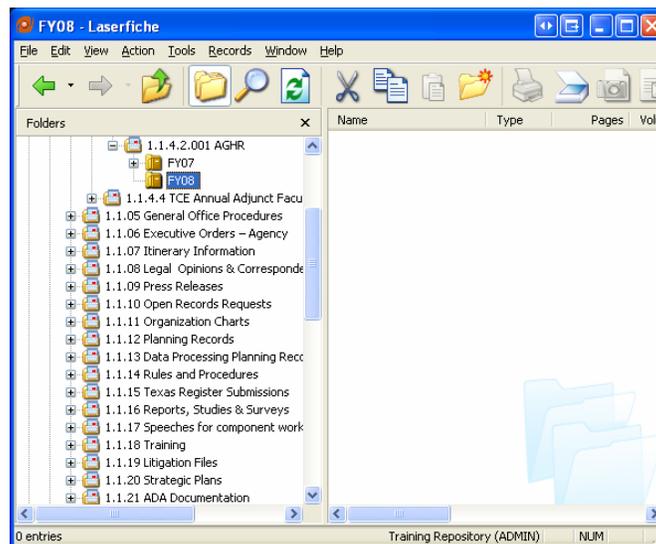
Next, select File>Export>Briefcase.



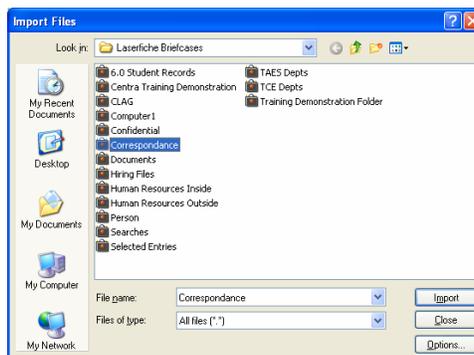
Next select a destination to save the Laserfiche Briefcase and name it appropriately. Click “Save” to finalize the export and save the Briefcase.



When you then need to re-create the folder structure, highlight the destination where you wish to import the Laserfiche Briefcase to.



Select File>Import and the following dialog box will appear. Browse to and choose the appropriate Laserfiche Briefcase. Click on “Import”.



The following dialog box will appear asking you to confirm the location you are seeking to import to. Confirm by clicking “OK”.



The Briefcase will complete its import (since there are no templates attached to our folder structure, it does not ask for confirmation of the template import). The destination folder now has the re-created folder structure, to include the associate sub-folders. All 60 folders are as they were in the previous folder. If personnel have changed, then the folder structure can be modified and re-exported to use as the new template.

