

# SEARCHING IN LASERFICHE

City of Manteca

10/29/2019

# INTRODUCING THE TEAM

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# TRAINING AGENDA



**Background  
Information**



**Searching in  
Laserfiche**



**Demo**



**Next Up in  
Laserfiche**

# DEFINITIONS

- Metadata – important information captured for a document, commonly known as indexing fields
- Template – an place to capture metadata for a document in an organized way
- OCR – Optical Character Recognition - used to recognize text in scanned documents

The defined words will appear throughout the slides with an \*

## WHY LASERFICHE

Improve management of records by:

- Automating the application of retention
- Improving access to documents
- Reducing redundancy of work and documents
- Creating a more effective and efficient Government

DOCUMENTS  
AVAILABLE IN  
LASERFICHE

- Minutes
- Resolutions
- Ordinances
- Agendas
- Contracts
- Recorded Documents

# NAMED LICENSE VS GENERAL LICENSE

## **Named License User**

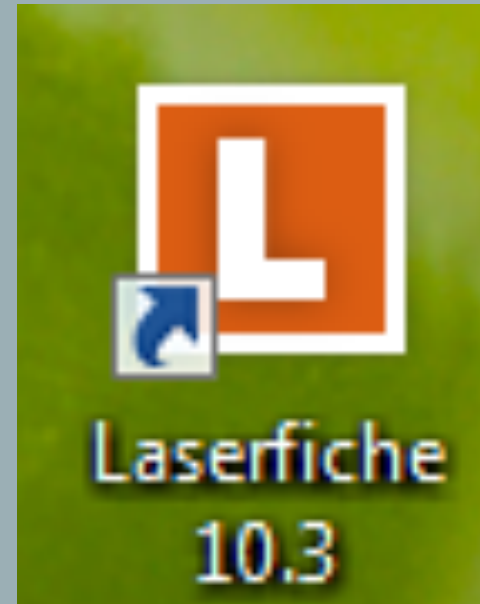
- Users with their own license under their name.
- Ability to scan/import records into repository

## **General License User**

- Users who share a license with everyone in the City.
- Read-Only access to repository of non-confidential documents

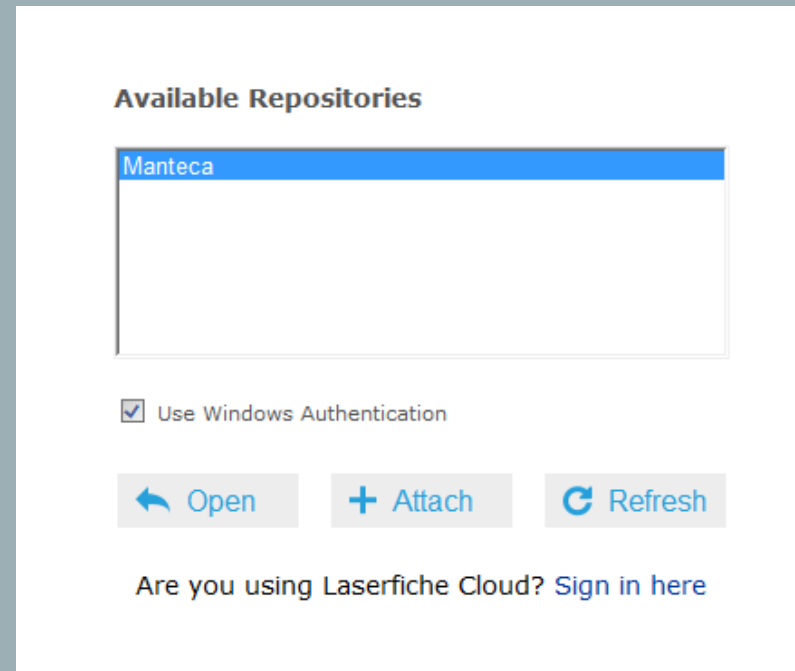
# HOW TO ACCESS LASERFICHE FOR NAMED LICENSE USERS

Open your Laserfiche icon that has been installed on your desktop.



# HOW TO ACCESS LASERFICHE FOR NAMED LICENSE USERS

- Laserfiche will automatically sign in with your Windows credentials.
- Click on the Manteca repository.

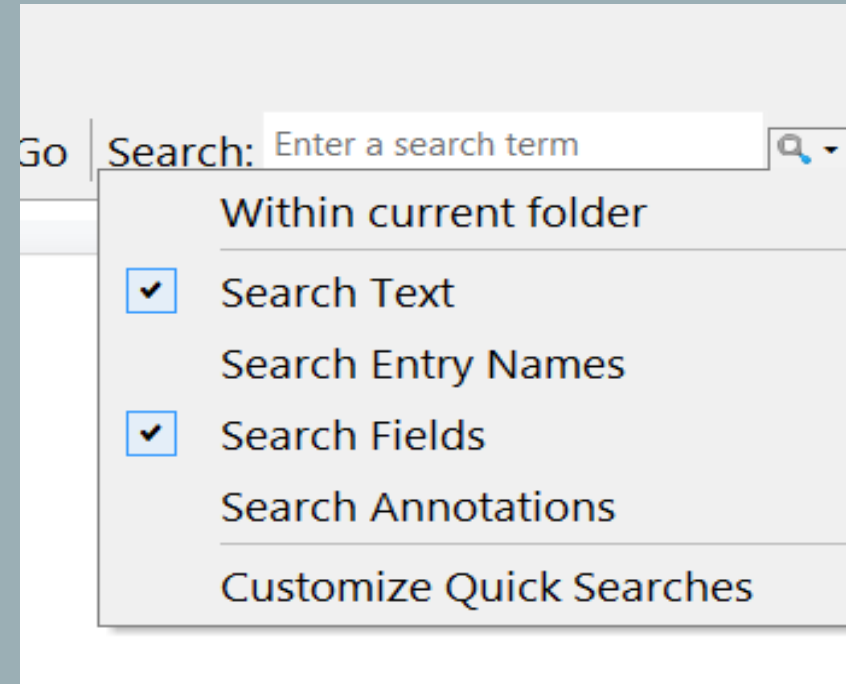


# SEARCHING IN LASERFICHE FOR NAMED LICENSES USERS

## BASIC SEARCH

*Basic Search is used when you don't know exactly what you're looking for or you're looking for different document types associated with your search.*

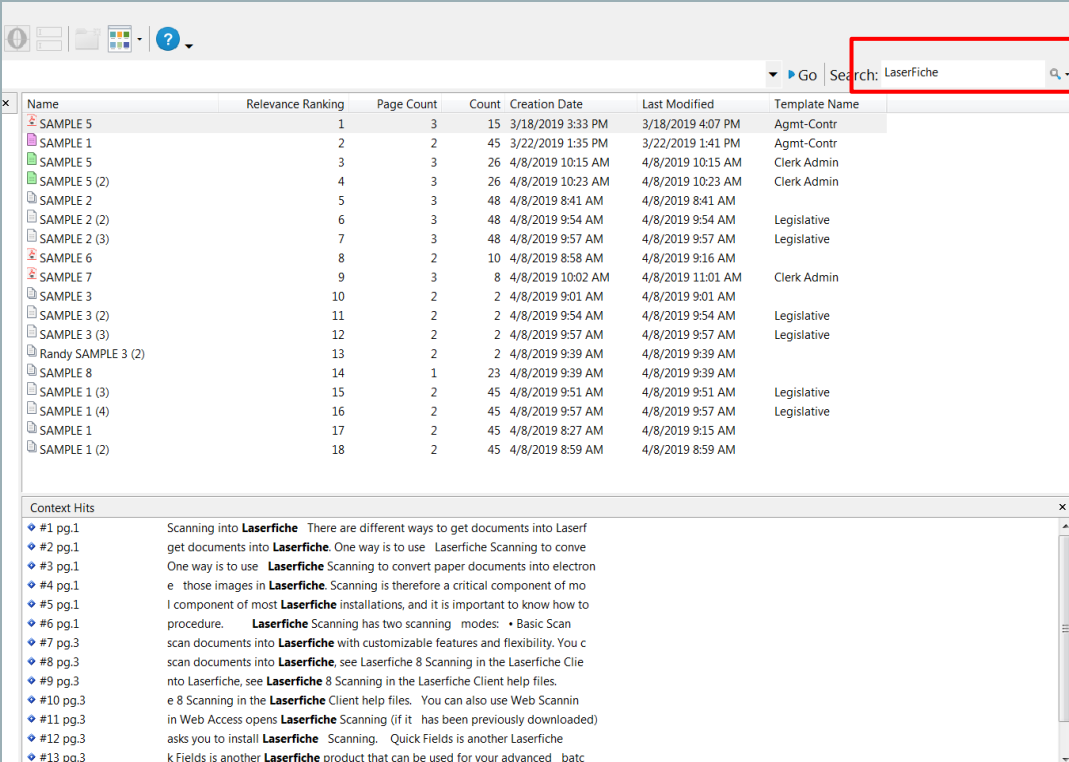
- Top right of tool bar.
- If you click on the magnifying glass icon you can choose some options.
  1. You can search within the folder you are in, by the name the document is entered as, by certain fields, or annotations.
  2. "Search Text" & "Search Fields" are default but you can also check any or all that apply to your search.
- Type in the keyword you'd like to search



# SEARCHING IN LASERFICHE FOR NAMED LICENSES USERS

## BASIC SEARCH

- Once search term is entered, two panes will pop up.
- The top pane shows the records, where as the bottom pane shows the page number that your search term is found within the document you've highlighted in the top pane.



The screenshot displays the Laserfiche search interface. At the top right, a search bar contains the term "Laserfiche" and a search icon. Below the search bar is a table of search results. The table has columns for Name, Relevance Ranking, Page Count, Count, Creation Date, Last Modified, and Template Name. The results list various sample documents with their respective rankings and page counts. Below the table, a "Context Hits" pane is visible, showing a list of page numbers (e.g., #1 pg.1, #2 pg.1) and a corresponding text snippet from the document.

Name	Relevance Ranking	Page Count	Count	Creation Date	Last Modified	Template Name
SAMPLE 5	1	3	15	3/18/2019 3:33 PM	3/18/2019 4:07 PM	Agmt-Contr
SAMPLE 1	2	2	45	3/22/2019 1:35 PM	3/22/2019 1:41 PM	Agmt-Contr
SAMPLE 5	3	3	26	4/8/2019 10:15 AM	4/8/2019 10:15 AM	Clerk Admin
SAMPLE 5 (2)	4	3	26	4/8/2019 10:23 AM	4/8/2019 10:23 AM	Clerk Admin
SAMPLE 2	5	3	48	4/8/2019 8:41 AM	4/8/2019 8:41 AM	
SAMPLE 2 (2)	6	3	48	4/8/2019 9:54 AM	4/8/2019 9:54 AM	Legislative
SAMPLE 2 (3)	7	3	48	4/8/2019 9:57 AM	4/8/2019 9:57 AM	Legislative
SAMPLE 6	8	2	10	4/8/2019 8:58 AM	4/8/2019 9:16 AM	
SAMPLE 7	9	3	8	4/8/2019 10:02 AM	4/8/2019 11:01 AM	Clerk Admin
SAMPLE 3	10	2	2	4/8/2019 9:01 AM	4/8/2019 9:01 AM	
SAMPLE 3 (2)	11	2	2	4/8/2019 9:54 AM	4/8/2019 9:54 AM	Legislative
SAMPLE 3 (3)	12	2	2	4/8/2019 9:57 AM	4/8/2019 9:57 AM	Legislative
Randy SAMPLE 3 (2)	13	2	2	4/8/2019 9:39 AM	4/8/2019 9:39 AM	
SAMPLE 8	14	1	23	4/8/2019 9:39 AM	4/8/2019 9:39 AM	
SAMPLE 1 (3)	15	2	45	4/8/2019 9:51 AM	4/8/2019 9:51 AM	Legislative
SAMPLE 1 (4)	16	2	45	4/8/2019 9:57 AM	4/8/2019 9:57 AM	Legislative
SAMPLE 1	17	2	45	4/8/2019 8:27 AM	4/8/2019 9:15 AM	
SAMPLE 1 (2)	18	2	45	4/8/2019 8:59 AM	4/8/2019 8:59 AM	

Context Hits

- ◆ #1 pg.1
- ◆ #2 pg.1
- ◆ #3 pg.1
- ◆ #4 pg.1
- ◆ #5 pg.1
- ◆ #6 pg.1
- ◆ #7 pg.3
- ◆ #8 pg.3
- ◆ #9 pg.3
- ◆ #10 pg.3
- ◆ #11 pg.3
- ◆ #12 pg.3
- ◆ #13 pg.3

Scanning into **Laserfiche** There are different ways to get documents into Laserfiche. One way is to use Laserfiche Scanning to convert paper documents into electronic images in **Laserfiche**. Scanning is therefore a critical component of most **Laserfiche** installations, and it is important to know how to perform this procedure. **Laserfiche** Scanning has two scanning modes: • Basic Scan scan documents into **Laserfiche** with customizable features and flexibility. You can scan documents into **Laserfiche**, see Laserfiche 8 Scanning in the Laserfiche Client help files. • Web Scanning in the **Laserfiche** Client help files. You can also use Web Scanning in Web Access opens **Laserfiche** Scanning (if it has been previously downloaded) asks you to install **Laserfiche** Scanning. Quick Fields is another Laserfiche product that can be used for your advanced batch

# SEARCHING IN LASERFICHE FOR NAMED LICENSES USERS

## BASIC SEARCH

- Click on the Document Preview icon to quickly see the record without having to open it up separately.
- Once you've clicked on a document, you will see your search term highlight in blue throughout the document in the Document Preview pane to the right.

The screenshot displays the Laserfiche web interface. The top navigation bar includes 'File', 'Edit', 'View', 'Tasks', 'Tools', 'Window', and 'Help'. A search bar at the top right shows 'Go Search: Laserfiche'. The main content area is divided into three panes:

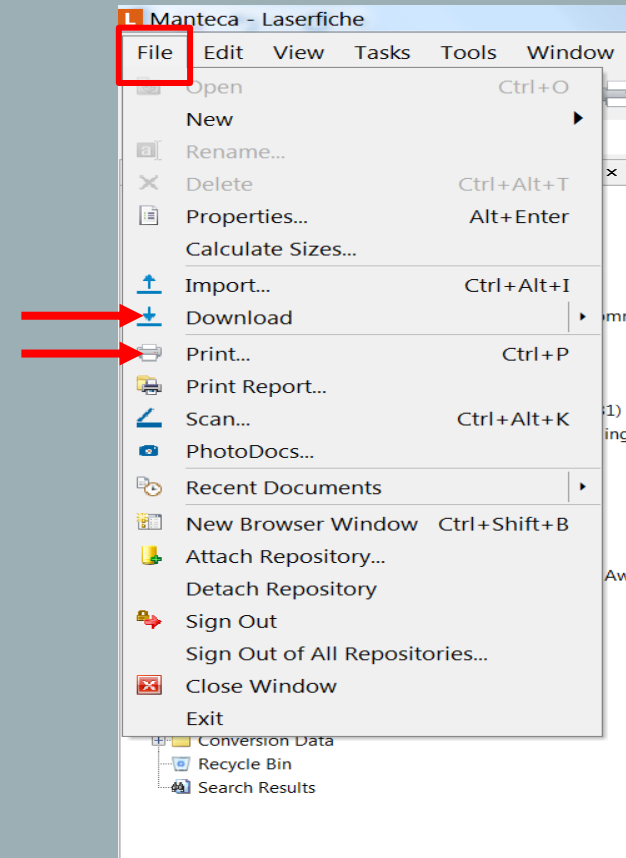
- Left Pane (Folders):** A tree view showing the hierarchy of folders under 'Manteca', including 'City Clerk', 'Incoming', 'Agreements, Contracts and Leases (001)', and many others.
- Middle Pane (Table):** A table of search results with columns: Name, Relevance Ranking, Page Count, Count, and Creation Date. The row 'SAMPLE 5 (2)' is highlighted in blue.
- Right Pane (Image):** A document preview pane showing a page titled 'Scanning into Laserfiche'. The text on the page describes the scanning process and provides instructions for users.

Name	Relevance Ranking	Page Count	Count	Creation Date
SAMPLE 5	1	3	15	3/18/2019 3:33 F
SAMPLE 1	2	2	45	3/22/2019 1:35 F
SAMPLE 5	3	3	26	4/8/2019 10:15 F
SAMPLE 5 (2)	4	3	26	4/8/2019 10:23 F
SAMPLE 2	5	3	48	4/8/2019 8:41 AI
SAMPLE 2 (2)	6	3	48	4/8/2019 9:54 AI
SAMPLE 2 (3)	7	3	48	4/8/2019 9:57 AI
SAMPLE 6	8	2	10	4/8/2019 8:58 AI
SAMPLE 7	9	3	8	4/8/2019 10:02 F
SAMPLE 3	10	2	2	4/8/2019 9:01 AI
SAMPLE 3 (2)	11	2	2	4/8/2019 9:54 AI
SAMPLE 3 (3)	12	2	2	4/8/2019 9:57 AI
Randy SAMPLE 3 (2)	13	2	2	4/8/2019 9:39 AI
SAMPLE 8	14	1	23	4/8/2019 9:39 AI
SAMPLE 1 (3)	15	2	45	4/8/2019 9:51 AI
SAMPLE 1 (4)	16	2	45	4/8/2019 9:57 AI
SAMPLE 1	17	2	45	4/8/2019 8:27 AI
SAMPLE 1 (2)	18	2	45	4/8/2019 8:59 AI

# SEARCHING IN LASERFICHE FOR NAMED LICENSES USERS

## BASIC SEARCH

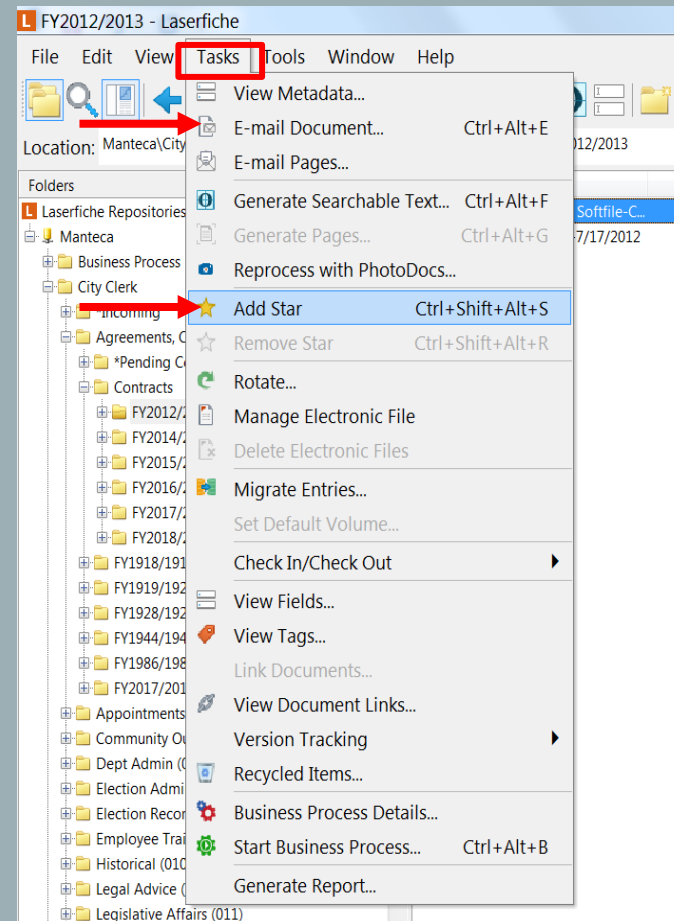
You can also Download or Print the document by clicking "File" in the top right corner of the tool bar.



# SEARCHING IN LASERFICHE FOR NAMED LICENSES USERS

## BASIC SEARCH

- You can also email the document by clicking the “Tasks” tab on the top right of the tool bar.
- You can also Add Star to a document as a bookmarker tool to easily go back and reference that search.

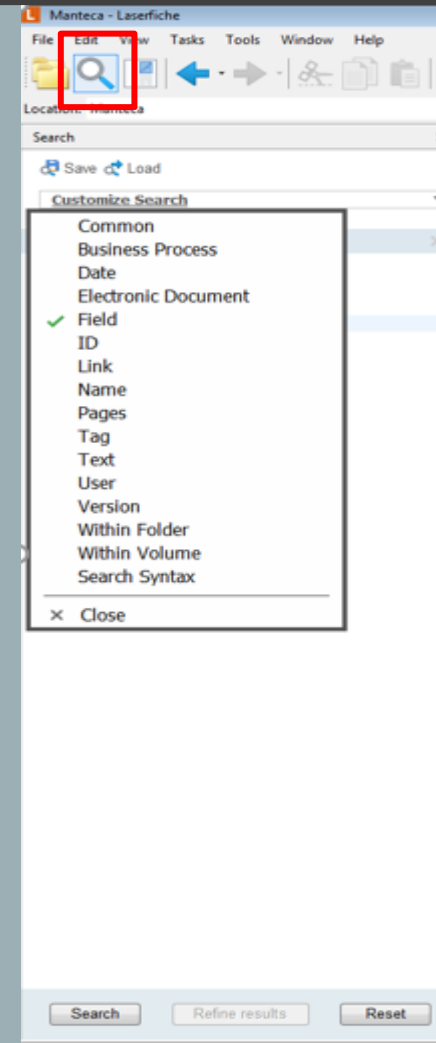


# SEARCHING IN LASERFICHE FOR NAMED LICENSES USERS

## ADVANCED SEARCH

*Advance Search is for when you KNOW what record type you're looking for (i.e. Agreement, Resolution, etc.)*

- Click the magnifying glass icon on the top left of the tool bar.
- An advanced search pane will appear on the left of your screen.
- The Customize Search drop down menu allows you to choose specific criteria for your advanced search.



The “Common” tool is your Basic Search where you can enter a search term.

The “Field” tool will allow you to search by \*Template and \*Metadata associated with that template.

# SEARCHING IN LASERFICHE FOR NAMED LICENSES USERS

## ADVANCED SEARCH

- If you want to search by \*Template, then you would need to fill in \*metadata to help further narrow down your search.
- Once a metadata field is filled in, you can then hit the Search button at the bottom.

Location: Manteca\Search Results

Search

Save Load

Customize Search

Field Search

Search across selected fields:

Search by template:

Agmt-Contr

Document Date  
04/08/2018 to 04/08/2019

Vendor Name

Fiscal Year

Department

Awarded?

Contract Start Date  
/ / to / /

Contract End Date  
/ / to / /

Contract Number

Search Refine results Reset

# SEARCHING IN LASERFICHE FOR NAMED LICENSES USERS

## ADVANCED SEARCH

- Again, your search results will appear in the middle of the screen.
- Click on Document Preview to view to view the document image.
- Here you can see both the full page and the thumbnails at the bottom.

The screenshot displays the LaserFiche search results page. The interface includes a menu bar (File, Edit, View, Tasks, Tools, Window, Help) and a toolbar with various icons. The search results are presented in a table with columns for Name, Page Count, Creation Date, and Last Modified. The search criteria are visible in the left sidebar, including 'Field Search' and 'Search by template' set to 'Legislative'. The main content area shows a list of search results for 'Ordinances', with the first result selected. The right sidebar contains a document preview window showing the text of the selected ordinance, including the title 'ORDINANCE O2018-32' and the text 'WHEREAS, currently, the City of Manteca states the length of permit is for one year from date of issuance; and'. Below the preview, there are thumbnail images of the document pages.

Name	Page Count	Creation Date	Last Mod
City Council-Ordinances-O2018-32-12/18/2018	2	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	2	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	2	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	105	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	3	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	6	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	4	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	26	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	21	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	3	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	8	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	3	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	13	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	4	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	3	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	7	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	10	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	3	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	3	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	5	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	3	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	9	3/26/2019 1:40 PM	3/28/201
City Council-Ordinances-O2018-...	26	3/26/2019 1:40 PM	3/28/201

ORDINANCE O2018-32

ORDINANCE OF THE CITY COUNCIL OF THE CITY OF MANTECA, STATE OF CALIFORNIA, AMENDING MANTECA MUNICIPAL CODE TITLE 8, HEALTH AND SAFETY, CHAPTER 8.04, BURGLAR ALARM SYSTEMS; 8.04.120 EXPIRATION AND RENEWAL OF PERMIT

WHEREAS, currently, the City of Manteca states the length of permit is for one year from date of issuance; and

WHEREAS, the Alarm Permit Application was updated with an annual expiration date of December 31<sup>st</sup>, however the Municipal Code was not updated to reflect this change; and

WHEREAS, the City Council has considered all information related to this matter, as presented at the public meeting of the City Council identified herein, including any supporting reports by City Staff, and any information provided during public meetings.

THE CITY COUNCIL OF THE CITY OF MANTECA DOES ORDAIN AS FOLLOWS:

**SECTION 1: Amendment.** Manteca Municipal Code section 8.04.120 is hereby

# SEARCHING IN LASERFICHE FOR NAMED LICENSES USERS

## ADVANCED SEARCH

- If you want to refine your results further, you can choose more tools in the Customize Search drop down menu.
- Once you've chosen more tools and filled in more information, click Refine Results at the bottom and your new results will appear.

Location: Manteca\Search Results

Search

Save Load

Customize Search

Field Search

Search across selected fields:

Search by template:

Agmt-Contr

Document Date  
04/08/2018 to 04/08/2019

Vendor Name

Fiscal Year

Department

Awarded?

Contract Start Date  
/ / to / /

Contract End Date  
/ / to / /

Contract Number

Search Refine results Reset

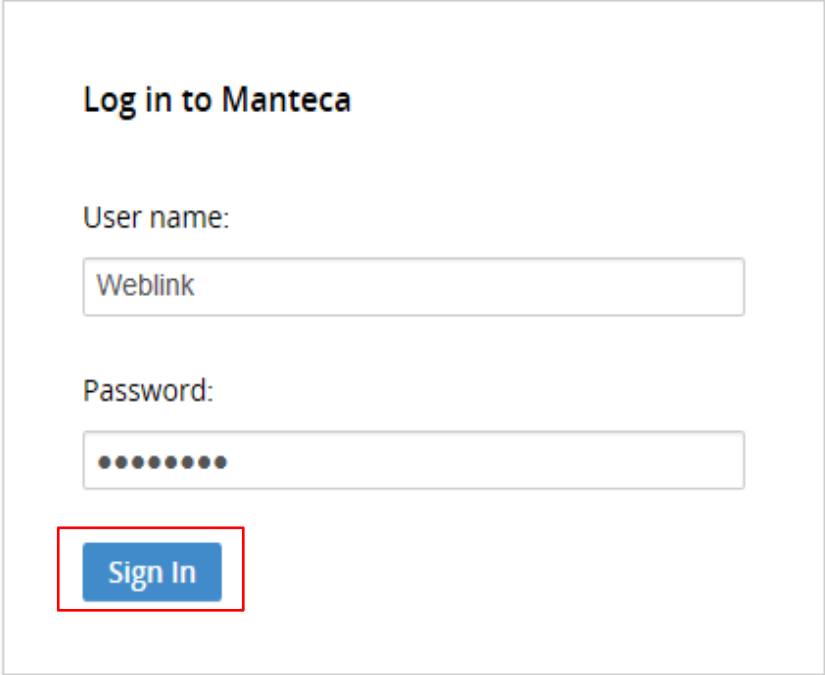
# HOW TO ACCESS LASERFICHE FOR GENERAL USERS

- Open the City Intranet Page. Here is the shortcut link to the screenshot shown.
- <http://intranet/cityclerk/SitePages/Records%20Management.aspx>
- Navigate to Records Management site in the City Clerk page.
- Click the link in the bottom right of the screen called “Internal Public Records Portal”.

The screenshot shows the City Clerk Records Management website. The page title is "Records Management" in green. The left sidebar contains navigation links: "Recently Modified", "Records Management", "ContractManagement", "Agenda Management", "Home", "ContractManagementOLD", "Libraries", "Site Pages", "Shared Documents", "Private Documents", "Drop Off Library", "Lists", "Calendar", "Tasks", "Laserfiche Forms Links", "Discussions", "Team Discussion", "Recycle Bin", and "All Site Content". The main content area has sections: "Records Retention Schedule" (with a link to "City of Manteca Retention Schedule - Approved-20170403.xlsx"), "Records Retention Schedule Training" (with links to "RS Training Slides-FINAL-20170915.pdf" and "CAPTURE-HD33c656\_2017-09-20\_14\_04\_26.mp4"), "Filtering in Excel" (with a link to "How to sort the Retention Schedule Document.docx"), and "FAQ's" (with a link to "RIM FAQs.docx"). On the right side, there is a "Destruction Process" section with a link to "Manteca Destruction Procedure 09-19-17.pdf" and a "Destruction Forms" section with links to "Request for Authority to Destroy Form.docx", "Destruction Inventory Form.xlsx", and "Destruction Certificate.docx". A red box highlights a link in the bottom right corner labeled "Internal Public Records Portal".

# HOW TO ACCESS LASERFICHE FOR GENERAL USERS

- The log in credentials will be prepopulated and won't be able to be edited.
- Click Sign In.
- There will be 10 concurrent login's for the City.
- If all of the login's are in use, there will be a message that will tell you.
- Laserfiche will automatically log you out after 10 minutes of no activity.



The screenshot shows a login form titled "Log in to Manteca". It contains two input fields: "User name:" with the value "Weblink" and "Password:" with masked characters. A blue "Sign In" button is located below the password field and is highlighted with a red border.

Log in to Manteca

User name:

Password:

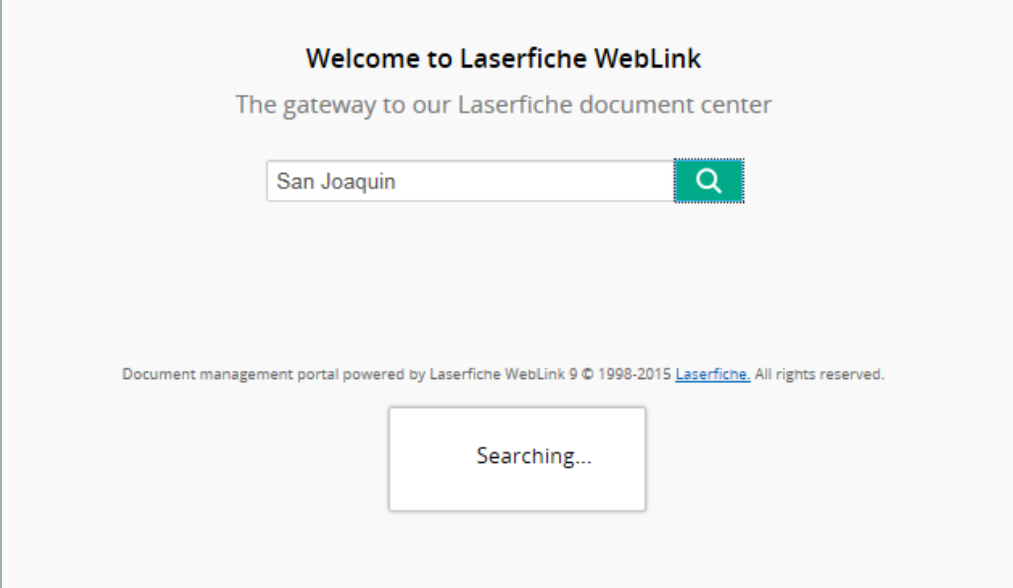
# SEARCHING IN LASERFICHE FOR GENERAL USERS

## BASIC SEARCH

*Basic Search is used when you don't know exactly what you're looking for or you're looking for different document types associated with your search.*

Once logged in, the default screen is the basic search bar.

Type in a search term in click the search button.

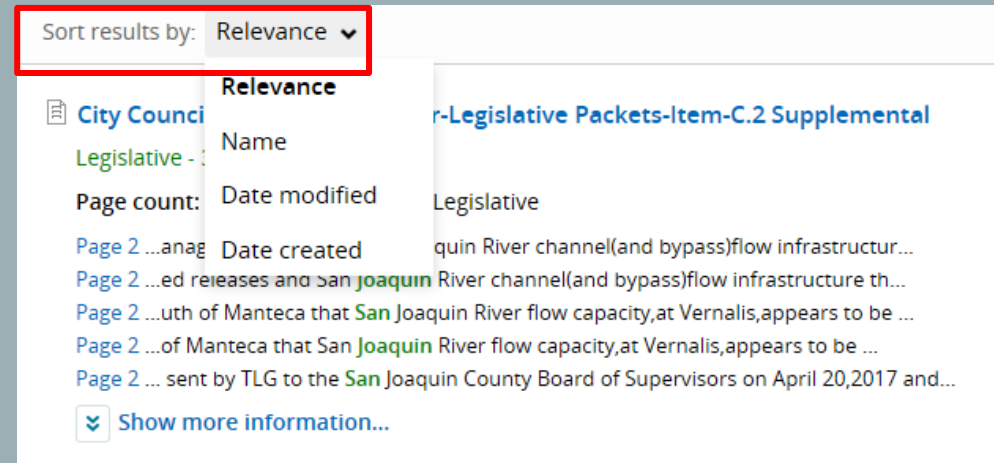


The screenshot shows the Laserfiche WebLink search interface. At the top, it says "Welcome to Laserfiche WebLink" and "The gateway to our Laserfiche document center". Below this is a search bar containing the text "San Joaquin" and a green search button with a magnifying glass icon. At the bottom of the page, there is a "Searching..." button. A footer at the bottom of the page reads: "Document management portal powered by Laserfiche WebLink 9 © 1998-2015 Laserfiche. All rights reserved."

# SEARCHING IN LASERFICHE FOR GENERAL USERS

## BASIC SEARCH

- A new page will load with the search results.
- You can sort by Relevance, Name, etc. if you click on the “Sort results by” drop down menu.



The screenshot shows a search results interface. At the top, a dropdown menu labeled 'Sort results by:' is set to 'Relevance'. Below this, a list of search results is displayed. The first result is titled 'City Council Legislative - ...' and is followed by a list of links, including 'Page 2 ...', 'Page 2 ...', 'Page 2 ...', and 'Page 2 ...'. A 'Show more information...' button is visible at the bottom of the results list.


Sort results by:	Relevance
City Council	Legislative - ...
Page 2 ...	Page 2 ...
Page 2 ...	Page 2 ...
Page 2 ...	Page 2 ...
Page 2 ...	Page 2 ...

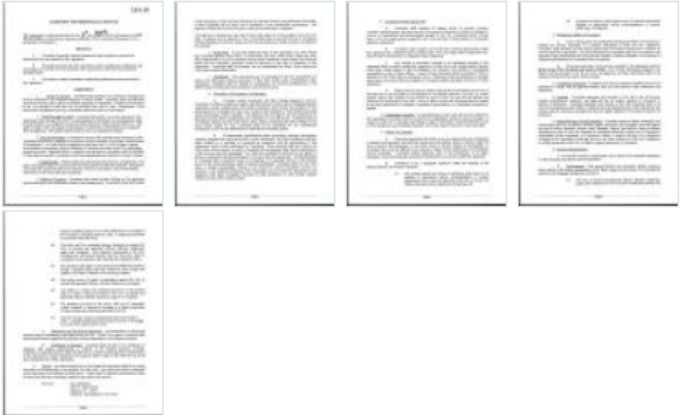
# SEARCHING IN LASERFICHE FOR GENERAL USERS

## BASIC SEARCH

If you click on Show More/Less Information, you will be able to see the metadata and the thumbnails of the document.

Sort results by: Name ▾ Results 1 - 1 of 1

 **Kaizen-C2018-108-8/10/2018**  
Agmt-Contr - 16 page(s)  
Page count: 16 Template name: Agmt-Contr  
[⬆ Show less information.](#)



Fields

Document Date: 08/10/2018 Vendor Name: Kaizen Fiscal Year: FY2018/2019 Department: CITY CLERK Awarded?: Yes Contract Number: C2018-108 PV Conversion Info: Resolution-; Description- Records Management; Subdivision- Signatures: Pending

# SEARCHING IN LASERFICHE FOR GENERAL USERS

## ADVANCED SEARCH

*Advance Search is for when you KNOW what record type you're looking for (i.e. Agreement, Resolution, etc.)*

- In the upper right corner of the screen, click on My Weblink.
- The next page will bring you the My Weblink page, where you can preform advance searches.
- Click on Search in the top bar.

[My Weblink](#) | [Help](#) | [About](#) | [Sign Out](#)

Laserfiche Weblink

[Home](#)

[Browse](#)

[Search](#)

My Weblink

Connection Information

Browse Options

Search Options

View Document Options

Export Options

Reset

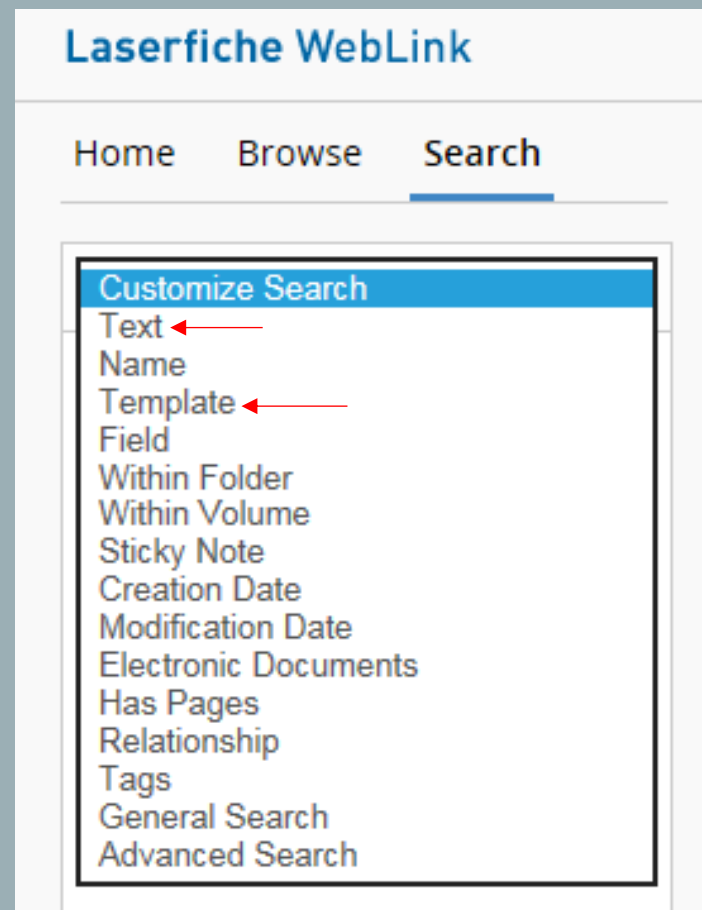
Connection Information

You are logged in as Weblink

# SEARCHING IN LASERFICHE FOR GENERAL USERS

## ADVANCED SEARCH

- In the Customize Search drop down menu, you can choose from a number of different search tools.
- The Text and Template tools will be the most useful.



The “Text” tool allows you to search any text throughout a document.

The “Template” tool allows you to search by \*Template and \*Metadata associated with that template.

# SEARCHING IN LASERFICHE FOR GENERAL USERS

## ADVANCED SEARCH

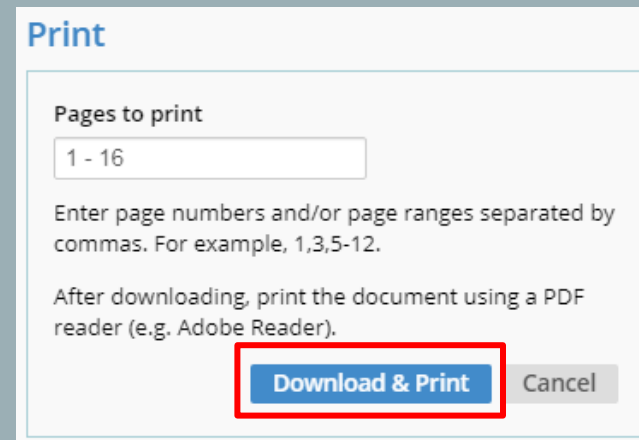
- Here, the Template tool was the only one chosen.
- The Vendor Name field was filled in.
- Click search down at the bottom on the Customize Search pane.
- Just like the Basic Search, you can click on Show More Information to see the metadata and thumbnails on the document.
- Click on the title of the document to open it up completely.

The screenshot displays the Laserfiche WebLink search interface. On the left is the 'Customize Search' pane with various filters. The 'Template' dropdown is set to 'Agmt-Contr'. The 'Vendor Name' field is filled with 'Kaizen'. The 'Search' button at the bottom of this pane is highlighted with a red box. On the right, the search results are shown. The top result is 'Kaizen-C2018-108-8/10/2018', which is also highlighted with a red box and a red arrow. Below the title, it shows 'Agmt-Contr - 16 page(s)' and 'Page count: 16 Template name: Agmt-Contr'. A 'Show less information...' link is highlighted with a red box. Below the text are four document thumbnails. At the bottom of the results pane, the 'Fields' section displays metadata: 'Document Date: 08/10/2018 Vendor Name: Kaizen Fiscal Year: FY2018/2019 Department: CITY CLERK Awarded?: Yes Contract Number: C2018-108 PV Conversion Info: Resolution-; Description- Records Management; Subdivision- Signatures: Pending'. The page number 'Page 1 of 1' is visible at the bottom right.

# SEARCHING IN LASERFICHE FOR GENERAL USERS

## ADVANCED SEARCH

- You can also Download or Print the document by clicking “PDF” in the top tool bar.
- Click Download & Print on the pop-up.
- The downloaded document will load into a new webpage where you can directly save it or print it.
- To email a document, copy the link in the web browser and paste it in the body of your email.



DEMO FOR GENERAL LICENSE USERS

## NEXT UP IN LASERFICHE

- The next departments being configured are:
  - Finance – File Plan is configured in Laserfiche and will test beginning of November
  - City Manager – File Plan being configured
  - Human Resources – File Plan being configured – confidential
- Plans for 2020
  - Contract Routing going live January 1<sup>st</sup>
  - Public Portal
  - More department File Plan Meetings with Kaizen

QUESTIONS?