

Texas A&M Laserfiche Shared Service

Laserfiche Outlook Integration

1. Open Laserfiche Client, and chose Tools -> Options from the Menu bar. In the Options window, choose New Documents -> Outlook.

L Options	lana -	Castler 1	×			
Autoname Browser Export Generate Pages Generate Text Hels New Documents General Settings	Default Behavior Attachments:	eave in e-mail document ds to attachments st Correspondence ed template the default for imported e-mails	•			
Name Conflicts Outlook File Conversion Print Reset Search Toolbars View	Field Subject Document Date Date Received To From Unit Reset to default rep	E-mail Property Subject Time sent Time received Recipients Sender e-mail <none></none>	Reset			
OK Cancel Help						

- 2. This allows the user to choose the Template that should be the default for the imported e-mails and also the option to choose the default behavior for the Attachments.
- 3. Below are the 2 options to Install the 'Laserfiche Office Integration' plugin:
 - a. When installing the Laserfiche Client.
 - By opening a Word document in Web Access. Go to web access, <u>https://edocs.tamu.edu/laserfiche/</u> and click on a word document. This will prompt to install the plugin.
- 4. Close Outlook and Reopen it.
- 5. You should be able to see 'LASERFICHE' tab in the menu bar.

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FILE HO	OME SEND / RECEIVE	FOLDER VIEW LASERFICH					
New New Email Items *	Ignore Ignore Ignore Ignore	Reply Reply All Forward All Meeting	Cartner Cartner Cartner Cartner Cartner Cartner Cartner Cartner Carter Frail Carter Frain Carter Ca	↑ ▼ Move	Rules OneNote	Assign Unread/ Categorize Follow Policy * Read * Up *	Search People Address Book Filter Email •
New	Delete	Respond	Quick Steps	G.	Move	Tags	Find

6. Click on 'LASERFICHE' tab. Choose the emails that should be saved into Laserfiche. Click 'Save to Laserfiche'.

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FILE HOME SEND / RECEIVE FOLD	ER VIEW LASERFICHE			
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Save to Save to Save Attachments Help Laserfiche Open Folder to Laserfiche × Actions Help				
∡ Favorites	All Unread Search Current Mailbox (Ctri+E) 🔎 Current Mailbox 👻 🕞 Reply 🚱 Reply All 😂 Forward 🧔 IM			
Inbox	! 谷 Ø FROM RECEIVED ▼ SIZE C 空 下 Thu 9/10/2015 9:27 AM			
Sent Items	▲ Date: Today ALL of the GSC Bldg <	GSC-/	ALL	@LIS
Deleted Items 13	Smith, Stephen J Thu 9/10/2015 9:27 AM 19 KB See note below from Central IT. Steve, Central IT will be Planned network outage on F	riday m	ornin	ıg.

- 7. Choose the repository and click 'Attach'.
 - a. Enter the Laserfiche Server name (e.g. cis-lf-riotest.tamu.edu:81)
 - b. Check 'Use SSL connection'
 - c. Choose the Repository from the dropdown.

L Laserfiche Repository Selection						
Please select the Laserfiche rep Test-CIS Common Test CIS-Rio Sandbox TEST-Human Resources TAMU-CIS TEST-Forms Users TEST-Forms Users TEST-DocuSign Test-Student Activities TEST-TAMU-IT-HR TEST-SO Use saved login information	ository. Attach E Refresh					
	OK Cancel					

Attach Repository	artes. Respondence P	×
Repository type Network repository		
Laserfiche Server:	cis-lf-riotest.tamu.edu:81	•
Web Access reposito	ry	
Address:	Freedow March Construction of the	
	Example: http://WebServerName/laserliche	
Repository name		
Name: TEST-CIS		-
Vise SSL connection		
	OK Cancel H	lelp

8. Choose 'Password Authentication' and enter the Name and Password. Click OK. This will be the Net ID Credentials (<NetId>@tamu.edu).

Login - Test-CIS	×
 Windows authentication Password authentication Name: pramanujam@tamu.edu Password:	OK Cancel Help

- 9. Click OK.
- 10. The email will be saved in the repository:
 - a. The 'General' tab shows the location where it will be stored and can be changed if needed.
 - b. The 'Fields' tab shows the metadata that is attached to this document. The template and the fields will be automatically mapped based on the setting in Laserfiche client done in Step 1.

c. If the email has attachments, the 'Attachments' tab will allow the user to configure document storage preferences in Laserfiche.

Import to Laserfiche	×
Document Name: Test	
General Fields Attachments Distribution List Tags Digital Sig	gnature
Folder:	Province
	browse
<pre>volume </pre>	
Generate searchable text	
✓ Index all pages	
	OK Cancel Help

L Import to Laserfiche	×							
Document Name: Test								
General Fields Attachments Distribution List Tags Digital Signature								
Template: Correspondence	•							
Subject								
Description Date								
9/9/2015								
Date Received 9/9/2015								
To Prin Pressure								
From								
binukoola@tamu.edu	•							
Unit								
	>							
Add/Ren	nove Fields							
OK Cancel	Help							

L	Import t	o Laserf	fiche			the second se	×
	Documen	t Name:	Test				
	General	Fields	Attachments	Distribution List	Tags	Digital Signature	
	Select ho	w the att	tachments shoul	d be imported to La	serfich	he:	
	Files		Leave in Messa	age Separate Doo	ument		
	📉 image	:001.jpg	\checkmark				
	💽 image	:001.jpg					
	Apply	settings	(folder, volume	, fields) to attachm	ents tha	at are stored as separate documents.	
	Message should be linked to attachments.						
	Link from	messag	e to attachment:	Attachment		~	
	Link from	attachm	ent to message:	Message			
						OK Cancel He	lp