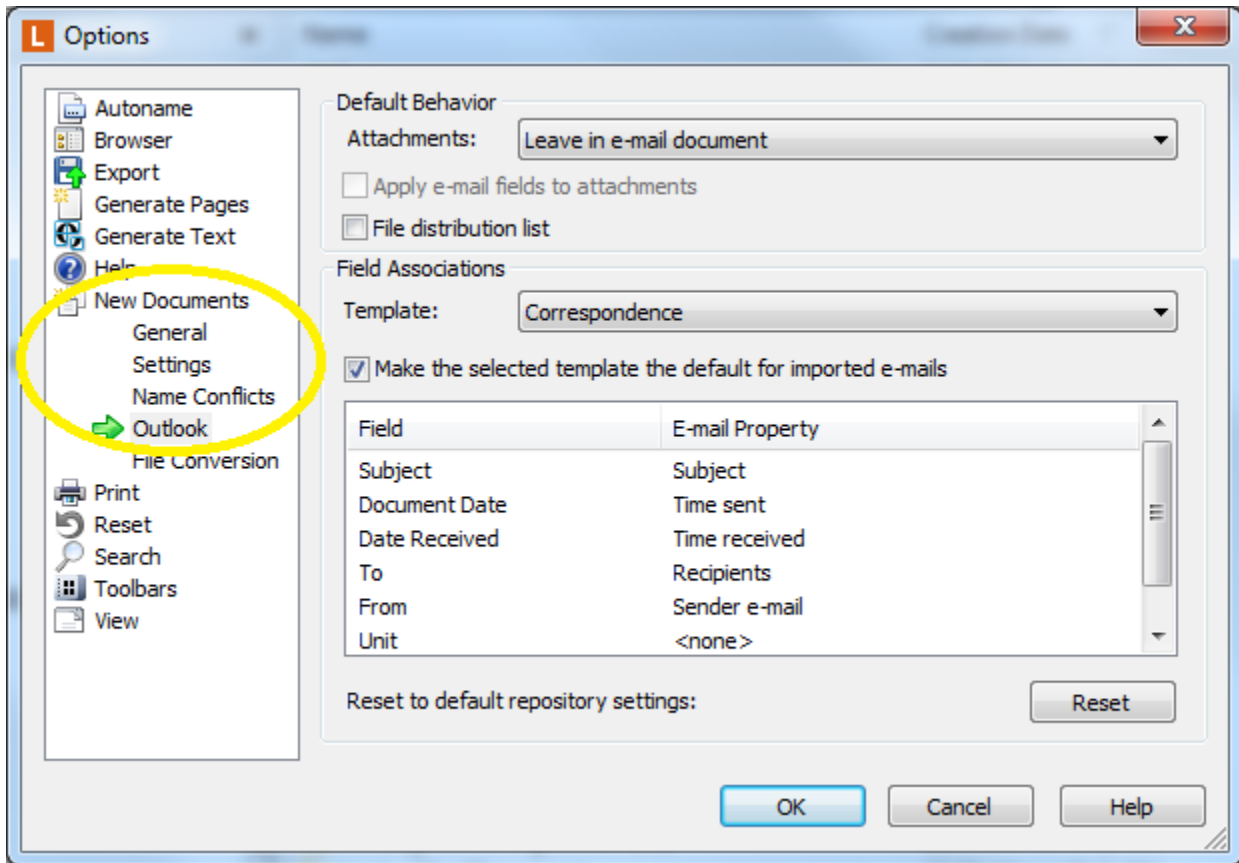# Texas A&M Laserfiche Shared Service

Laserfiche Outlook Integration

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


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.
   b. By opening a Word document in Web Access. Go to web access, https://edocs.tamu.edu/laserfiche/ and click on a word document. This will prompt to install the plugin.

4. Close Outlook and Reopen it.

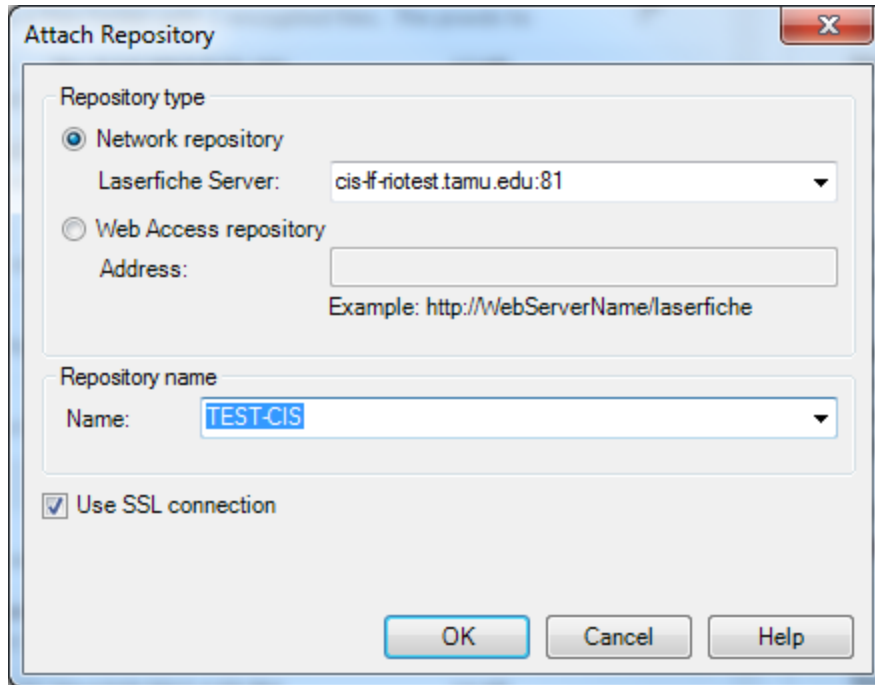5. You should be able to see 'LASERFICHE' tab in the menu bar.
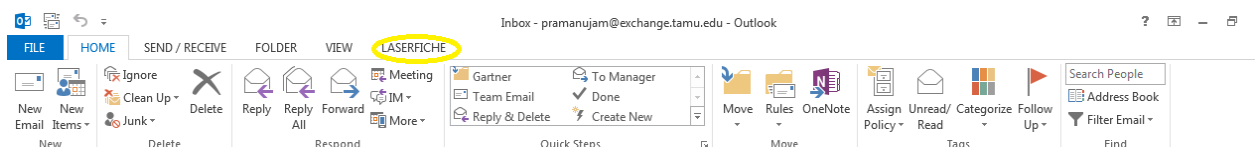
6. Click on 'LASERFICHE' tab. Choose the emails that should be saved into Laserfiche. Click 'Save to Laserfiche'.
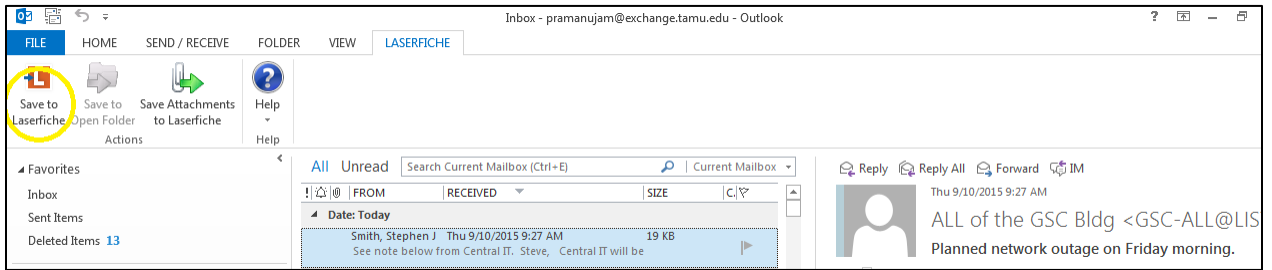
7. Choose the repository and click 'Attach'.
   a. Enter the Laserfiche Server name (e.g. cis-lf-riotest.tamu.edu:81)
   b. Check 'Use SSL connection'
   c. Choose the Repository from the dropdown.
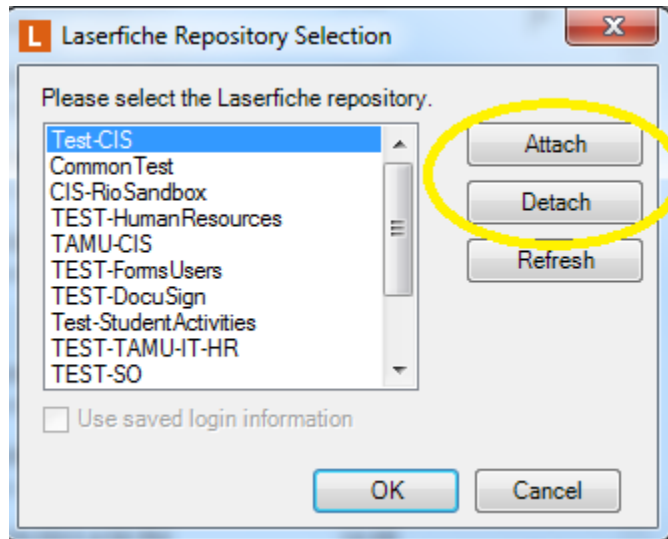
8. Choose 'Password Authentication' and enter the Name and Password. Click OK. This will be the Net ID Credentials (<NetId>@tamu.edu).
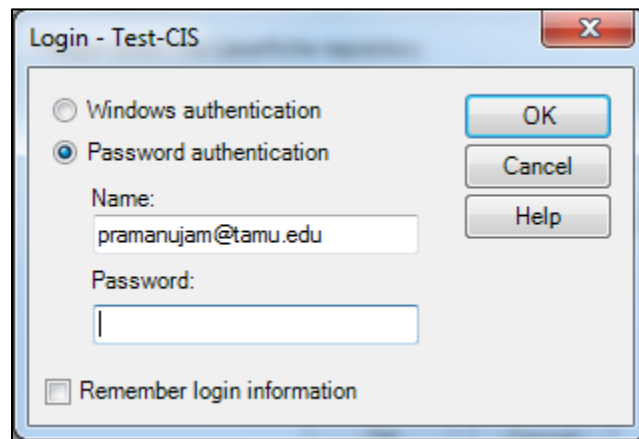
9. Click OK.

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.
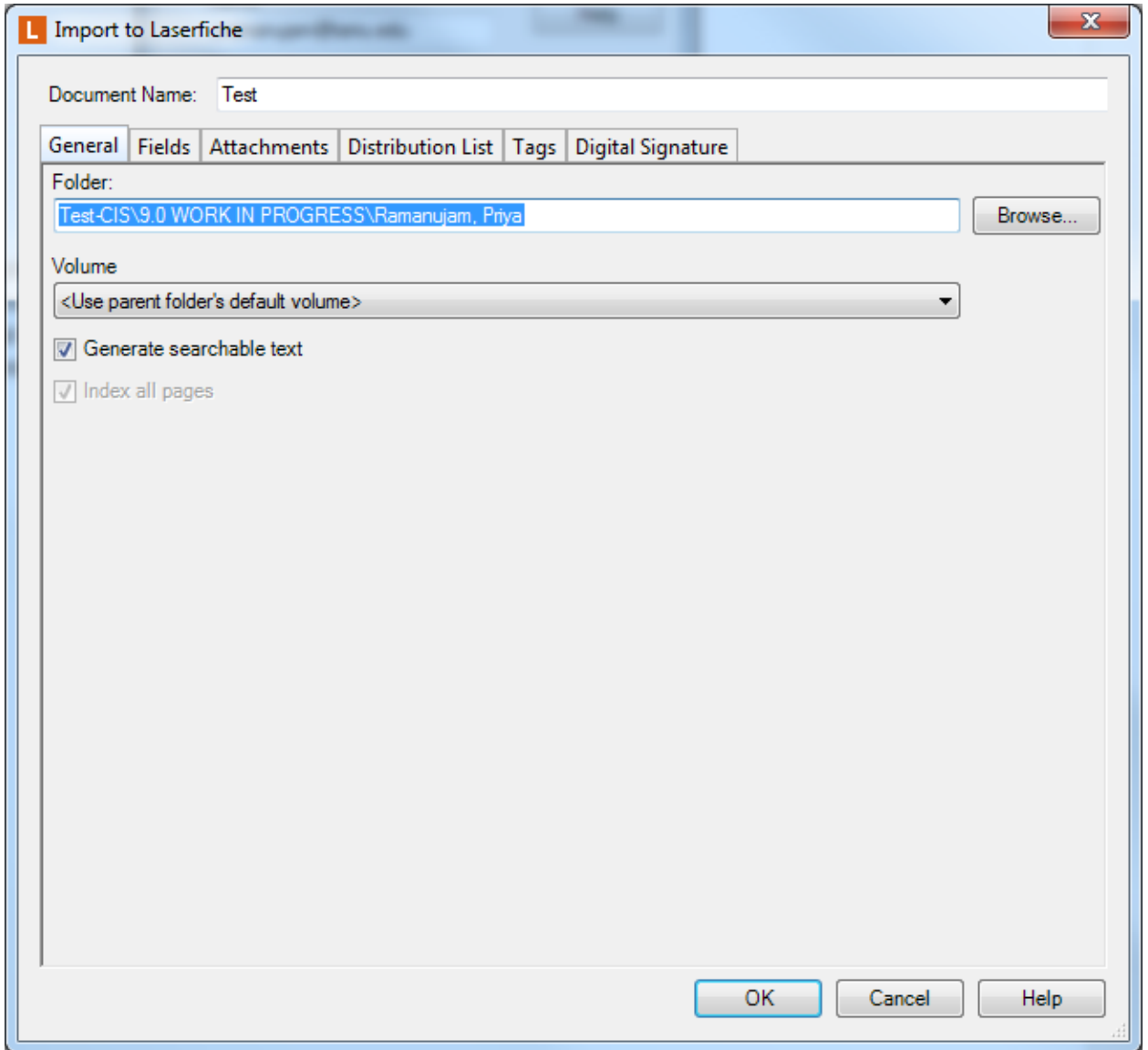
Import to Laserfiche

Document Name: Test

General | Fields | Attachments | Distribution List | Tags | Digital Signature

Folder:
Test-CIS\9.0 WORK IN PROGRESS\Ramanujam, Priya   [Browse...]

Volume
<Use parent folder's default volume>

☑ Generate searchable text

☑ Index all pages

[OK] [Cancel] [Help]

Import to Laserfiche

Document Name: Test

General | **Fields** | Attachments | Distribution List | Tags | Digital Signature

Template: Correspondence

Subject
Test

Document Date
9/9/2015

Date Received
9/9/2015

To
Priya Ramanujam

From
binukoola@tamu.edu

Unit

Add/Remove Fields...

OK | Cancel | Help

Import to Laserfiche

Document Name: Test

General | Fields | **Attachments** | Distribution List | Tags | Digital Signature

Select how the attachments should be imported to Laserfiche:

Files	Leave in Message	Separate Document
image001.jpg	☑	☐
image001.jpg	☑	☐

☐ Apply settings (folder, volume, fields) to attachments that are stored as separate documents.

☐ Message should be linked to attachments.

Link from message to attachment: Attachment ▼

Link from attachment to message: Message

[OK] [Cancel] [Help]