

Cerenade FormsServer Connectivity for Laserfiche

Table of Contents

INTRODUCTION	2
SYSTEM REQUIREMENTS	3
APPLICATION CONFIGURATION	4
A) Laserfiche – Create a Single Repository	4
B) FormsServer – One Laserfiche Folder for All E-forms.....	5
C) FormsServer – One Laserfiche Folder per E-form	6
D) ESArchiver	8
D (1) Setting ESArchiver Parameters – via MMAESArchiver	9
D (2) Connecting ESArchive to Laserfiche – via MMAESArchiver.....	10
D (3) Setting ESArchiver Parameters – via INI file	11
HOW FORMSSERVER CONNECTIVITY WITH LASERFICHE WORKS.....	11
HOW FORMSSERVER CONNECTIVITY WITH LASERFICHE WORKS.....	12
CONFIGURING TIFF-EXCHANGE PRINT DRIVER	13
CONFIGURING TIFF OUTPUT RESOLUTION.....	15
HOW TO SET FORMS PROPERTIES	17
HOW TO SETUP ESARCHIVER AS A SERVICE	19
INSTALLATION INTO A VIRTUAL PC	21

INTRODUCTION

Cerenade has developed a service that it calls “Cerenade ESArchiver”. Cerenade ESArchiver has an input and an output. As input, Cerenade ESArchiver processes a Job Control File (.MTF). MTF files are prepared by Cerenade Forms Server or Cerenade Enterprise Server applications. An MTF file can contain job information such as which form to be populated with which data, archived in what format, placed into which repository, and finally which template fields to update.

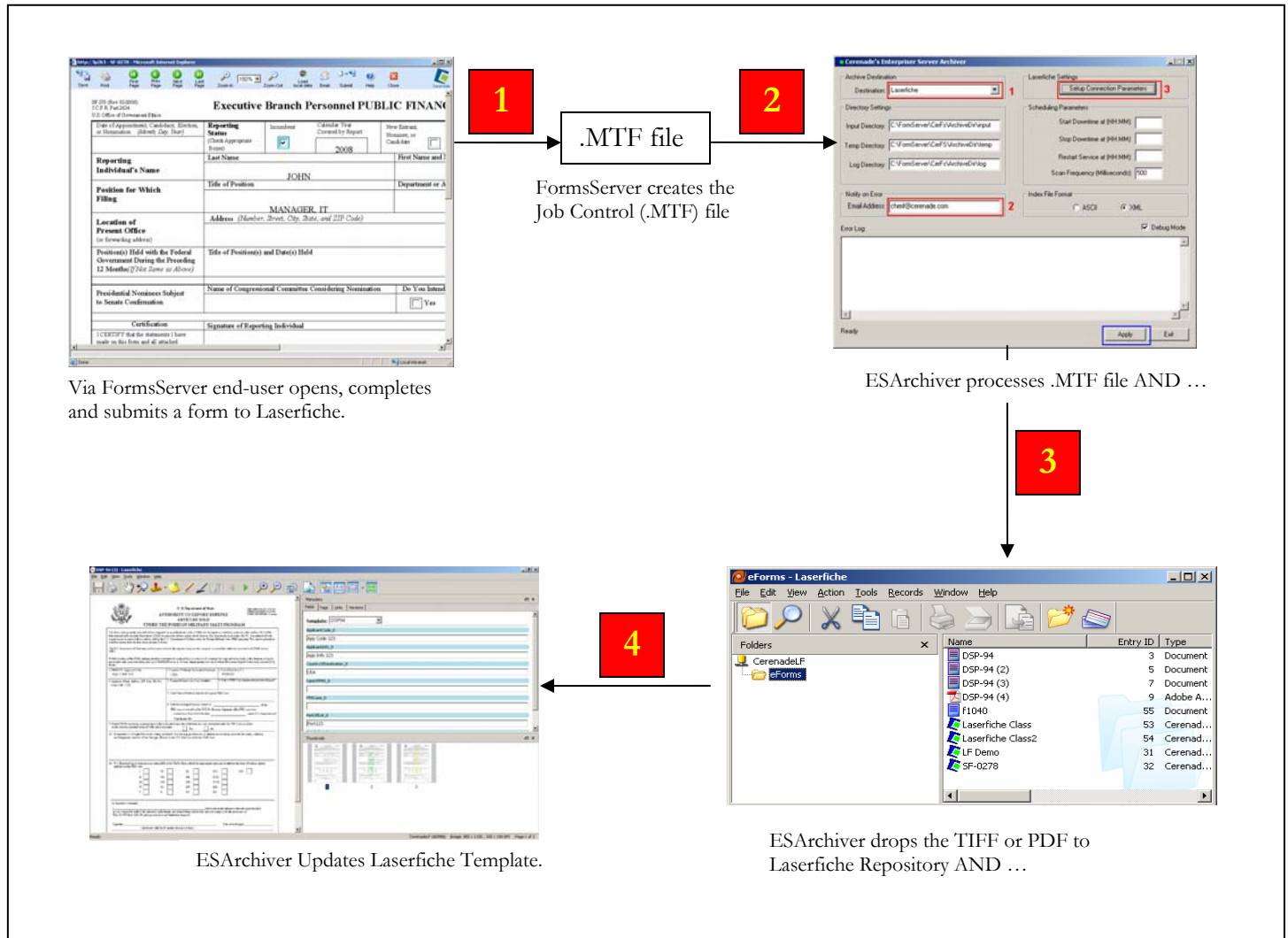


Diagram 1 – Cerenade FormsServer Connectivity for Laserfiche Process Flow

System Requirements

Before we start, let's point out Server Requirements for installation and configuration of Cerenade FormsServer Connectivity for Laserfiche. They are:

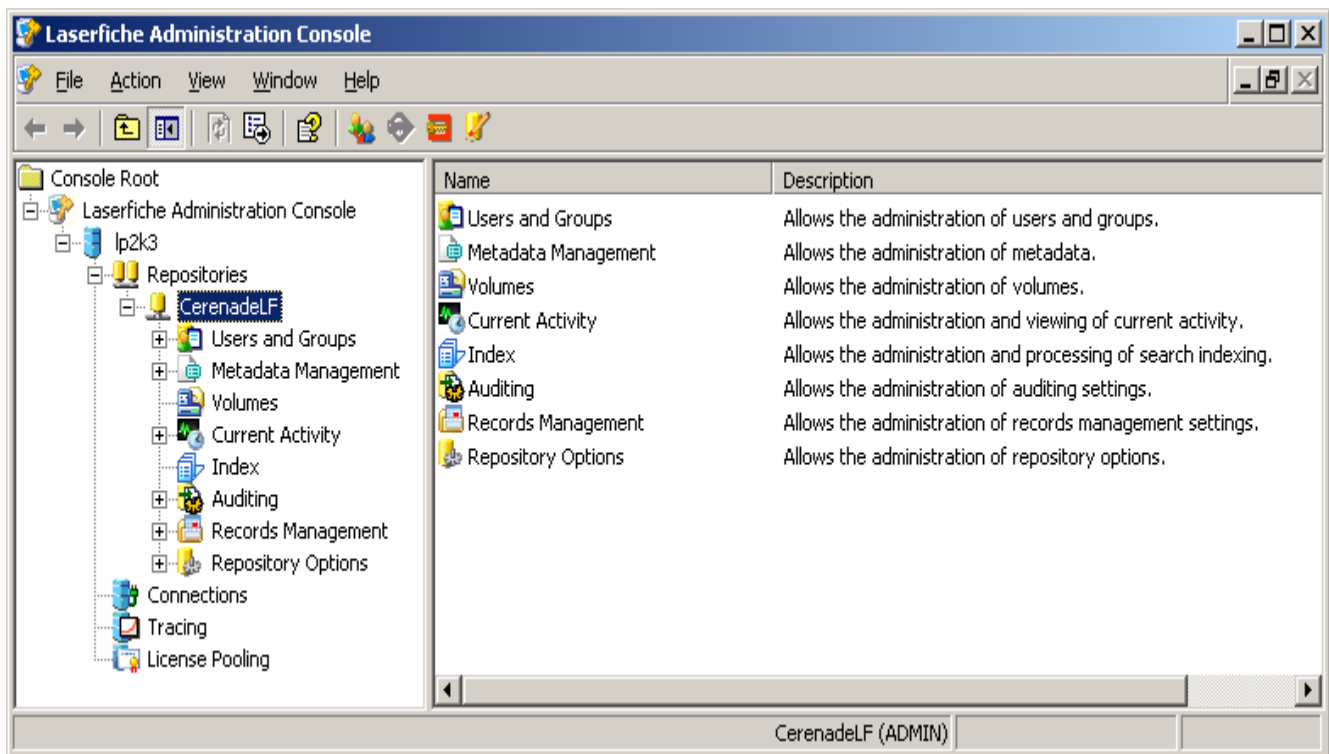
- 1) Windows 2003 Server or better
- 2) IIS 6.0
- 3) .NET 2.0 Framework
- 4) Laserfiche 7.2 or better
- 5) Laserfiche 7.2 Run-time component. Install this in addition to Laserfiche 8.0 run-time library you may already have present on your server.
NOTE: Laserfiche 7.2 Run-time library can be downloaded from:
www.cerenade.com/laserfiche/7.2 Runtime.zip
- 6) MS SQL Server 2000 or 2005
- 7) MS SQL Tools
 - a. Management Tools
 - b. Connectivity Components
 - c. Legacy Components
- 8) Administrative access and full rights to SQL Server, and Laserfiche.

Application Configuration

FormsServer, ESArchiver and Laserfiche need to be configured properly in order to work synchronously. The following chapters explain how the configuration is done for each of these applications.

A) Laserfiche – Create a Single Repository

- Create a repository (in this example: CerenadeLF)
NOTE: Only one repository can be used. E-forms can all be saved onto a single Folder or grouped into multiple Folders or on a one Folder per E-form. However, keep in mind that only one repository is allowed for each instance of FormsServer.
- You will use the name of this Repository later when you configure FormsServer and ESArchiver.



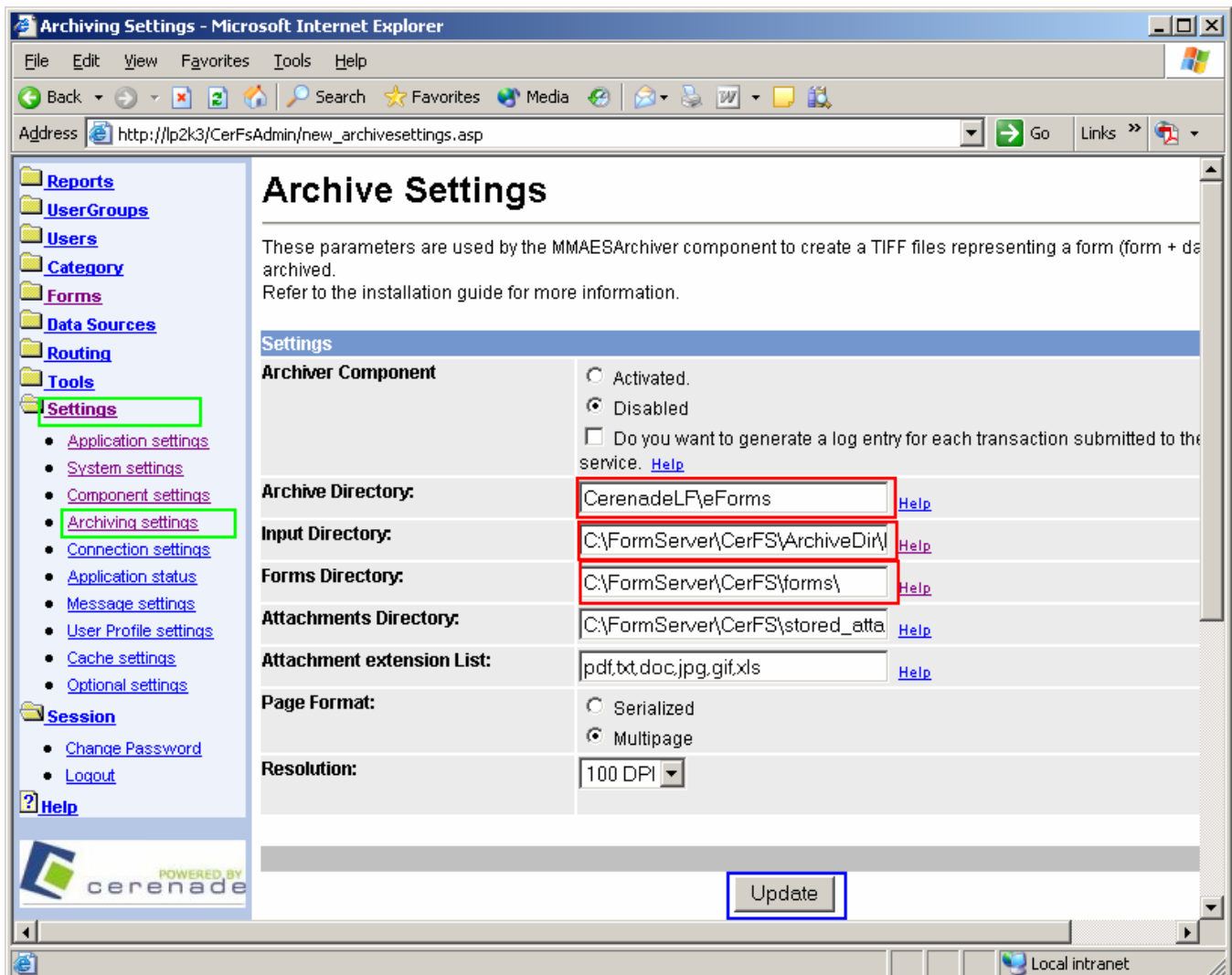
Laserfiche Administrative Console

B) FormsServer – One Laserfiche Folder for All E-forms

Assign a single Folder for the entire system. All E-forms will be archived onto a single Laserfiche Folder.

- Login to FormsServer Administrative Console
- Select “Settings | Archive Settings”
- Set “Archive Directory” to an **existing** Laserfiche Folder. Start with the name of the Laserfiche Repository. Example: CerenadeLF\eForms
NOTE: Program assumes that the folder you named here already exists.
- “Input Directory” should have a default value. If not, set it to the folder where FormsServer will drop the .MTF files to.
- “Forms Directory” should have a default value. DO NOT modify this value.
- Click the “Update” button and logout of FormsServer Admin Console

NOTE: the folder specified here will be the system-wide folder for all E-forms. Individual forms can override this value – see section C below.



The screenshot shows the 'Archive Settings' page in a Microsoft Internet Explorer browser. The address bar shows the URL: http://lp2k3/CerFsAdmin/new_archivesettings.asp. The page title is 'Archive Settings'. Below the title, there is a description: 'These parameters are used by the MMAESArchiver component to create a TIFF files representing a form (form + data) archived. Refer to the installation guide for more information.' The settings are organized into a table-like structure:

Settings	
Archiver Component	<input type="radio"/> Activated. <input checked="" type="radio"/> Disabled <input type="checkbox"/> Do you want to generate a log entry for each transaction submitted to the service. Help
Archive Directory:	CerenadeLF\eForms Help
Input Directory:	C:\FormServer\CerFS\ArchiveDir\ Help
Forms Directory:	C:\FormServer\CerFS\forms\ Help
Attachments Directory:	C:\FormServer\CerFS\stored_atta Help
Attachment extension List:	pdf,txt,doc,jpg,gif,xls Help
Page Format:	<input type="radio"/> Serialized <input checked="" type="radio"/> Multipage
Resolution:	100 DPI

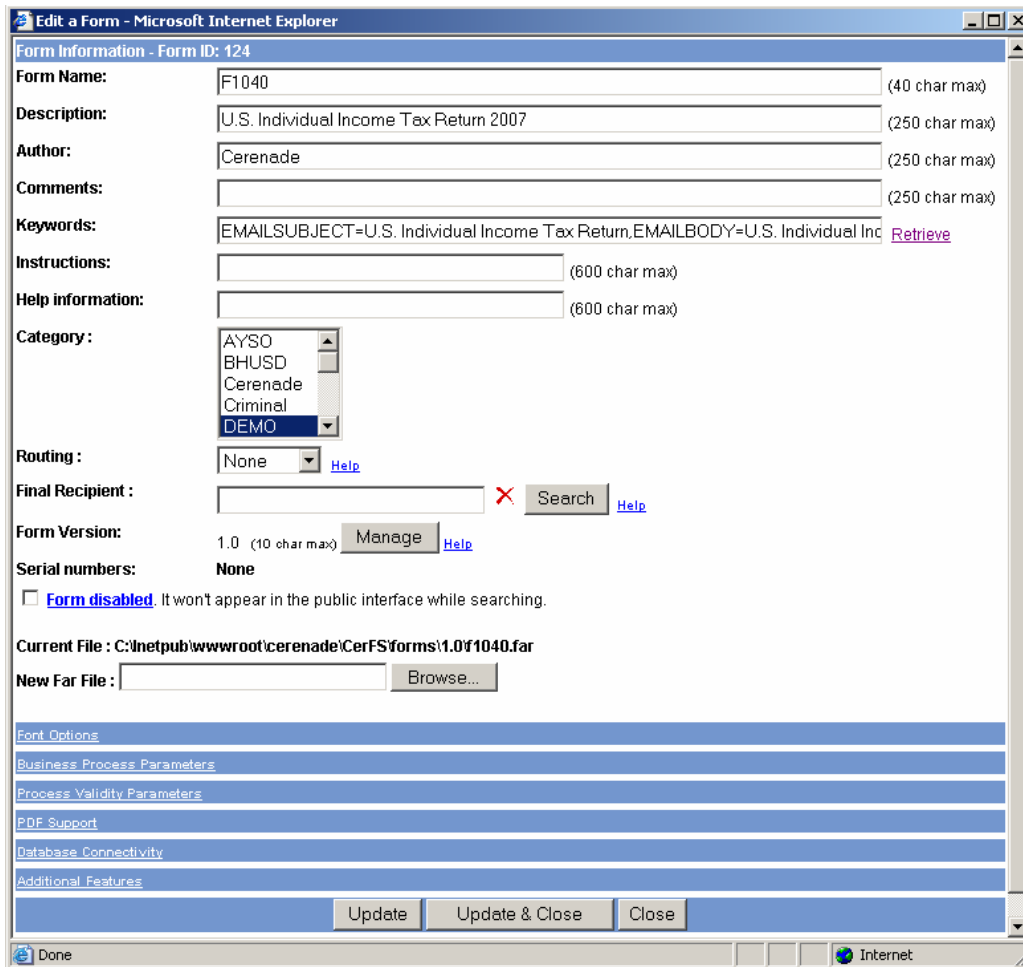
At the bottom right of the settings area, there is an 'Update' button highlighted with a blue box. The left sidebar shows a navigation menu with 'Settings' highlighted in green, and 'Archiving settings' also highlighted in green. The Cerenade logo is visible in the bottom left corner of the page.

FormsServer Administrative Console

C) FormsServer – One Laserfiche Folder per E-form

Assign a Folder to each E-form. All instances of one E-form will be archived onto its assigned Laserfiche Folder.

- Login to FormsServer Administrative Console
- Locate the E-form, and access its properties



Form Information - Form ID: 124

Form Name: F1040 (40 char max)

Description: U.S. Individual Income Tax Return 2007 (250 char max)

Author: Cerenade (250 char max)

Comments: (250 char max)

Keywords: EMAILSUBJECT=U.S. Individual Income Tax Return, EMAILBODY=U.S. Individual Inc [Retrieve](#)

Instructions: (600 char max)

Help information: (600 char max)

Category: AYSO, BHUSD, Cerenade, Criminal, DEMO

Routing: None [Help](#)

Final Recipient: [Help](#)

Form Version: 1.0 (10 char max) [Help](#)

Serial numbers: None

[Form disabled](#). It won't appear in the public interface while searching.

Current File: C:\inetpub\wwwroot\cerenade\CerFS\forms\1.0\F1040.far

New Far File:

[Font Options](#)

[Business Process Parameters](#)

[Process Validity Parameters](#)

[PDF Support](#)

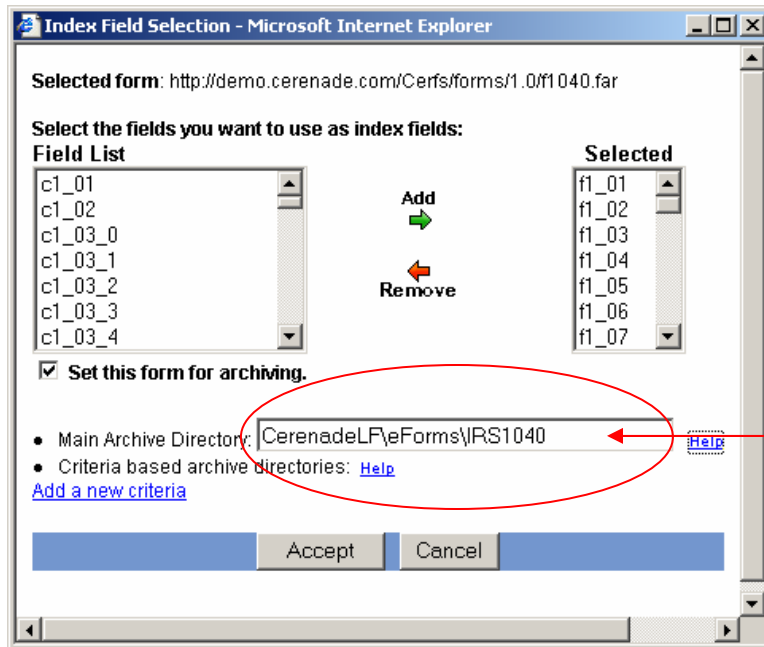
[Database Connectivity](#)

[Additional Features](#)

Done Internet

Properties of an E-form in FormsServer Administrative Console

- Click on “Additional Features” and select the “Archive Settings” button



Enter full path for the Folder name starting with the Repository name.

Archive Property of a Single E-form

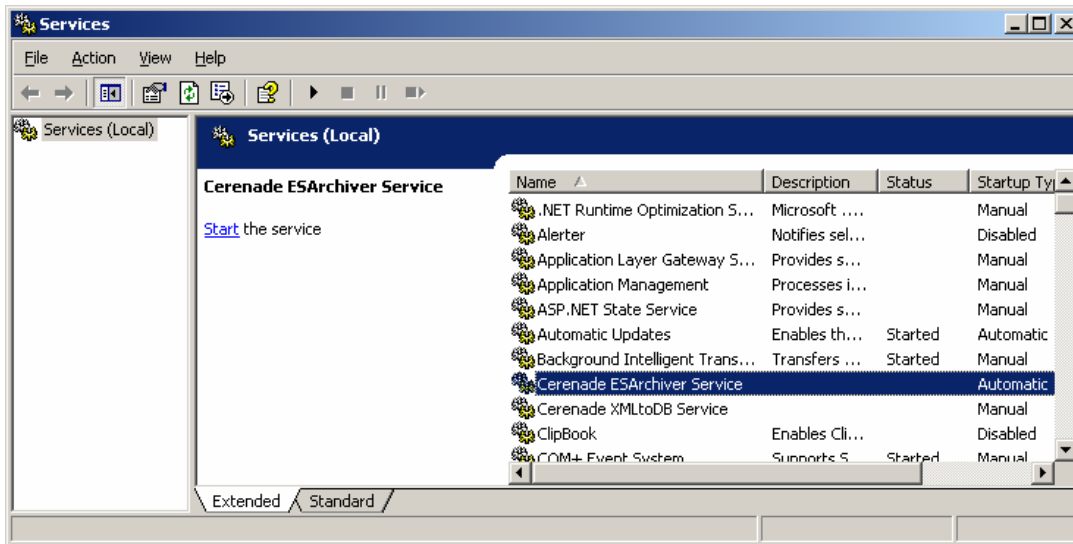
- Set “Main Archive Directory” to an existing Laserfiche Folder. Start with the name of the Laserfiche Repository. Example: CerenadeLF\eForms\IRS1040.
- Click the “Accept” button to get back to the previous screen.
- Click the “Update & Close” button to save your changes.

NOTE: the folder specified here will always override the system-level folder specified on the section B above.

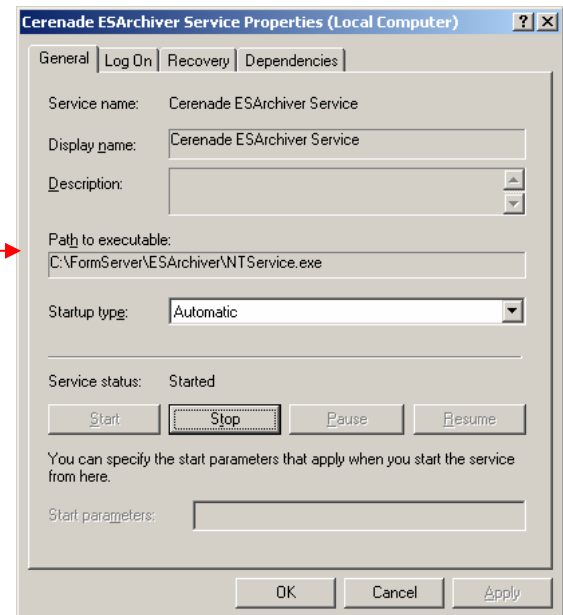
D) ESArchiver

ESArchiver is the link between FormsServer and Laserfiche. FormsServer submits all E-forms to Laserfiche through ESArchiver. ESArchiver runs in 2 modes: Service (automatic) and Manual. Following explains how to configure ESArchiver so it can communicate with Laserfiche.

- Open “Administrative Tools | Services” program of Windows.



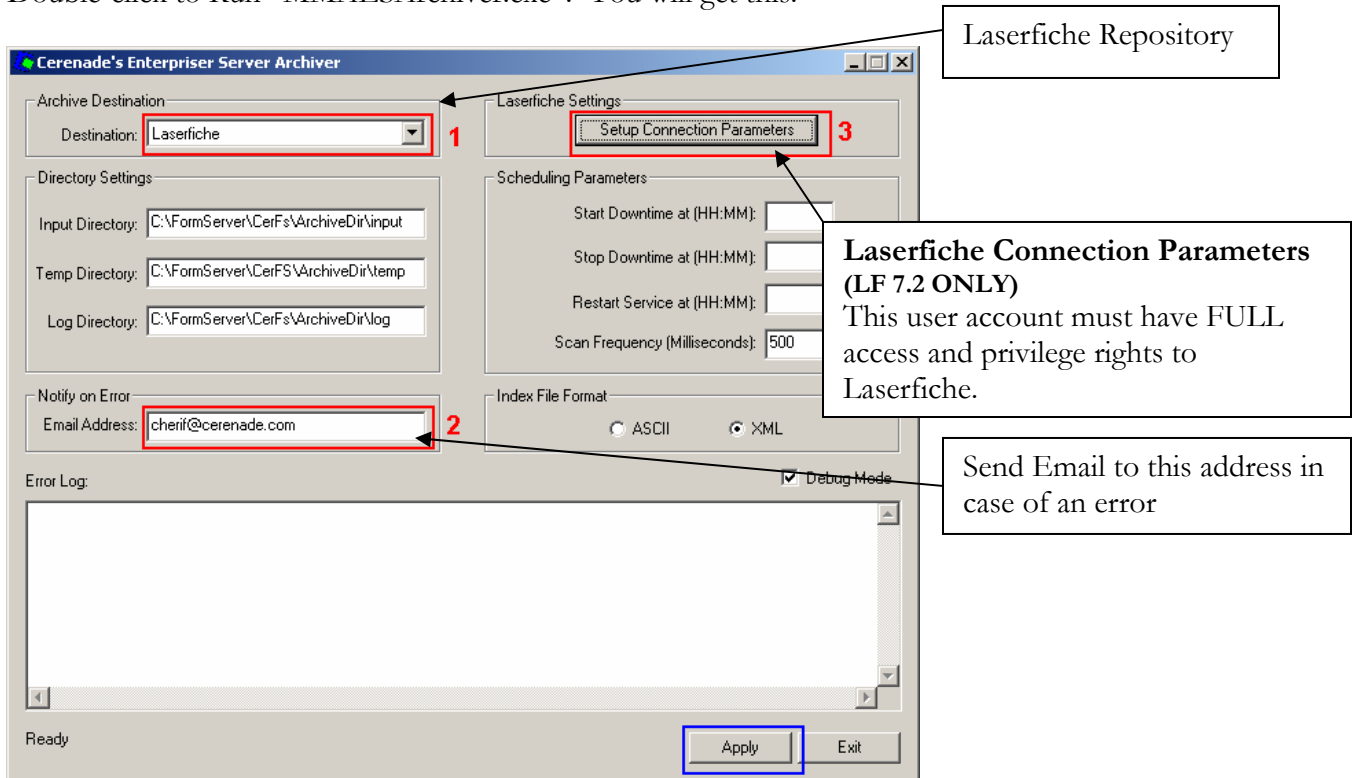
- Locate “Cerenade ESArchiver”
NOTE: If “Cerenade ESArchiver” is not listed, then exit the Services window and setup “Cerenade ESArchiver” as a Service and then come back here.
- Double-click on “Cerenade ESArchiver” to open the properties window. You will get this:
- Click the “Stop” button to **STOP** this service



- Click the “Log On” tab
- Select “This account” option
- Click “Browse...” to assign a user account to this Service.
NOTE: This account must have FULL Administrative Rights
- Type in the password for this user
- Click the “Ok” button
- Visit the folder where the “NTService.exe” is located at
- In this folder you will find another application called “MMAESArchiver.exe”
NOTE: “MMAESArchiver.exe” is the ESArchiver console and can run only if the Archiver service (NTService.exe) has stopped.
- Double-click to Run “MMAESArchiver.exe”.

D (1) Setting ESArchiver Parameters – via MMAESArchiver

- Make sure Archiver (“Cerenade ESArchiver Service”) is stopped.
- Double-click to Run “MMAESArchiver.exe”. You will get this:



- Set the “Archive Destination” from the drop list
- Make sure “Input Directory” matches the value you set in the FormsServer Administrative Console.
- Set the “Email Address” to the email address of the person to notify where the Archiver experiences problems.
- **(LF 7.2)** Click on the “Setup Connection Parameters” to configure Archiver to work with Laserfiche.
(LF 8.0) Please see “Setting ESArchiver Parameters – via INI file” section.
NOTE: If you press the “Setup Connection Parameters” and get an error then check the following possibilities:
 - 1) You do not have administrative rights to Laserfiche
 - 2) Laserfiche client/server services are not running
 - 3) Laserfiche 7.2 Run-time Component (API) is not installed on the server
 - 4) Laserfiche is in Read-Only mode.
 - 5) You are running LF 8.0. Please see “Setting ESArchiver Parameters – via INI file” section



To manually “Setup Connection Parameters” please see “Setting ESArchiver Parameters – via INI file” section.

D (2) Connecting ESArchive to Laserfiche – via MMAESArchiver

- Make sure Laserfiche Server (“Laserfiche Server 7.2” Service) and Client (“Laserfiche FCC 7.2” Service) are running.
- Make sure Archiver (“Cerenade ESArchiver Service”) is stopped.
- Double-click to Run “MMAESArchiver.exe”.
- Click on the “Setup Connection Parameters” button to configure Archiver with Laserfiche Settings. You will get this:



- Select the Laserfiche Repository
- Set/Reset “Use Windows Authentication” – Default is OFF
- Set/Reset “Keep Connection Alive” – Default is OFF
- Click “OK” when done.
- Upon exiting this screen, if “Use Windows Authentication” is OFF, you will be asked to provide login/password for a Laserfiche User Account. This User Account is used by Archiver to create template, add documents to Laserfiche Repository.

NOTE: It is best for this User Account to have Full “Feature Rights” and Full “Privileges”.

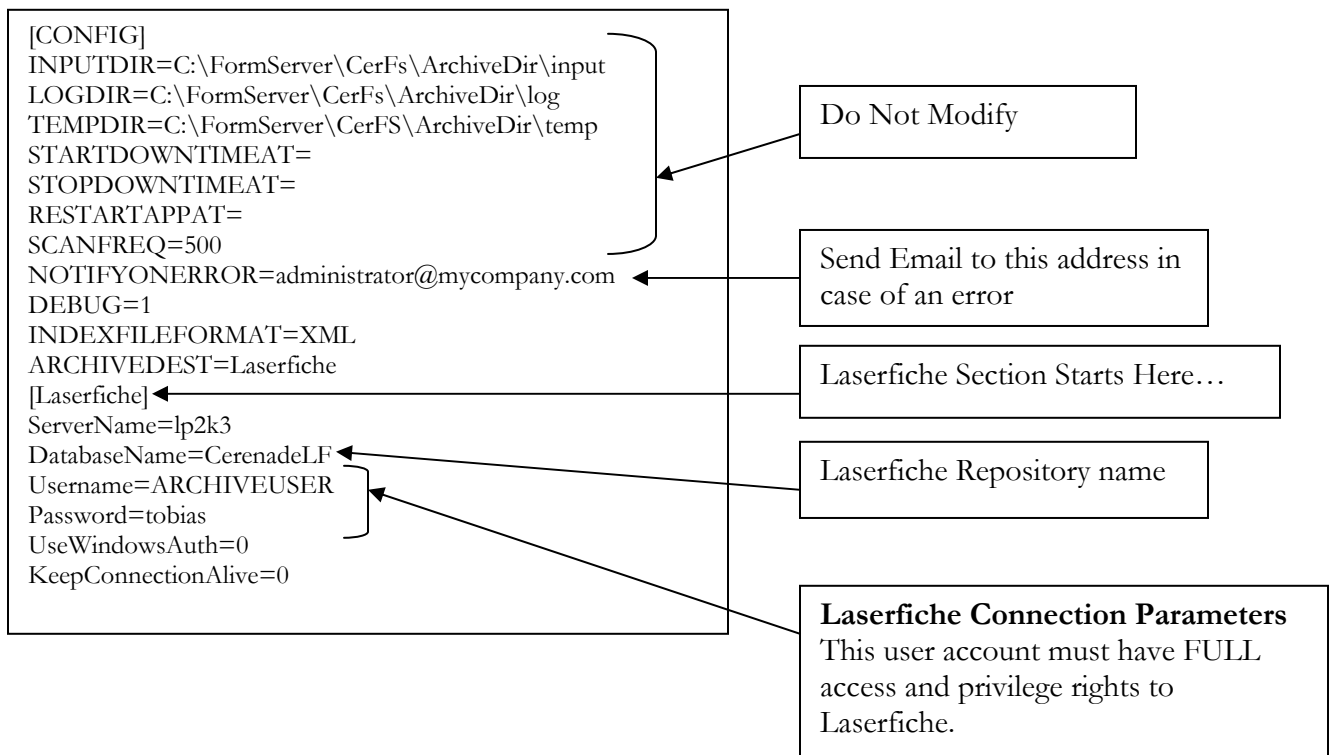


To manually “Setup Connection Parameters” please see “Setting ESArchiver Parameters – via INI file” section.

D (3) Setting ESArchiver Parameters – via INI file

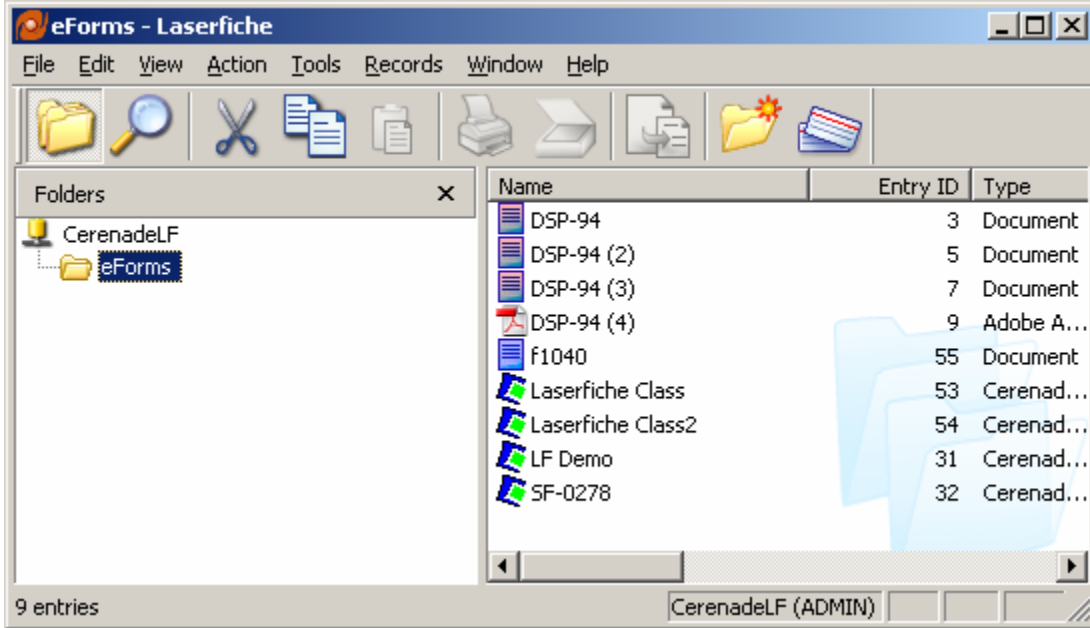
To manually configure Laserfiche Connectivity parameters, please follow these instructions.

- 1) Exit “Cerenade Enterprise Server Archiver” – the above program
- 2) STOP “MMA ES Archiver” Service
- 3) Open MMAESARCHIVER.INI
- 4) Manually set Archiver connectivity parameters with Laserfiche that are located under “[Laserfiche]” section
- 5) SAVE & EXIT “MMAESARCHIVER.INI”
- 6) START “MMA ES Archiver” Service. Make sure this service is set to “Automatic”

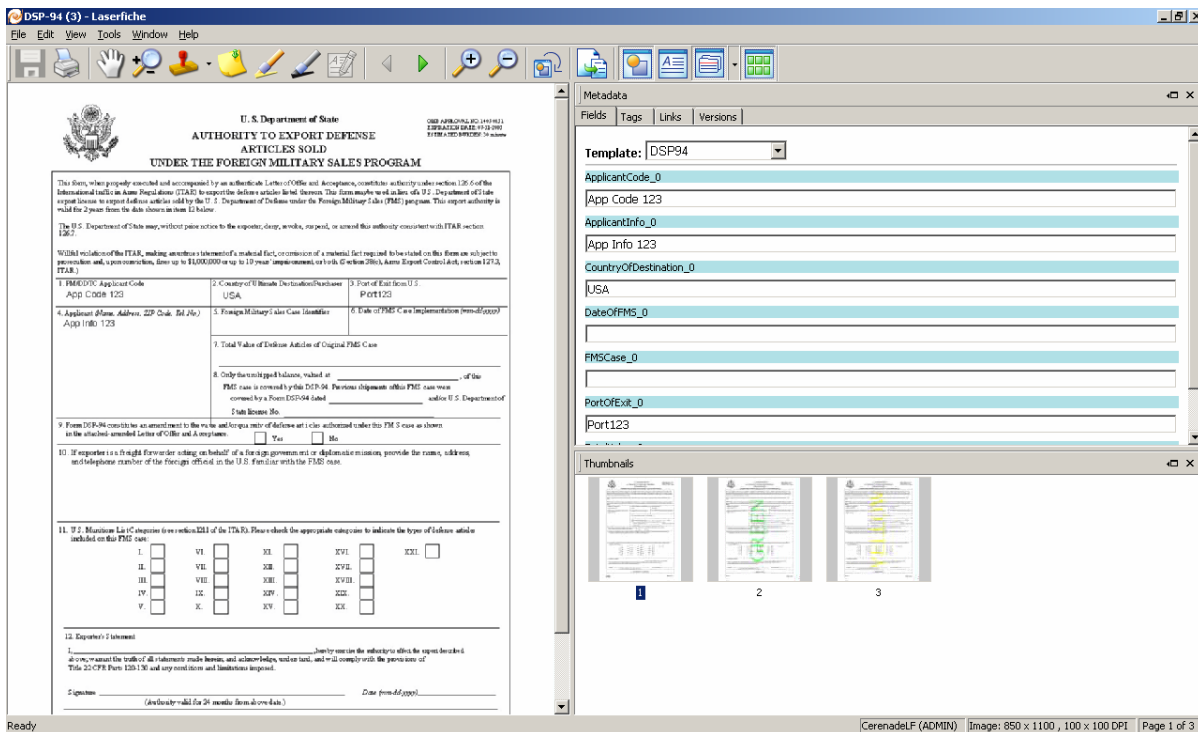


How FormsServer Connectivity with Laserfiche Works

If all components are configured properly, then end-user submittals to Laserfiche will look like the following in Laserfiche:



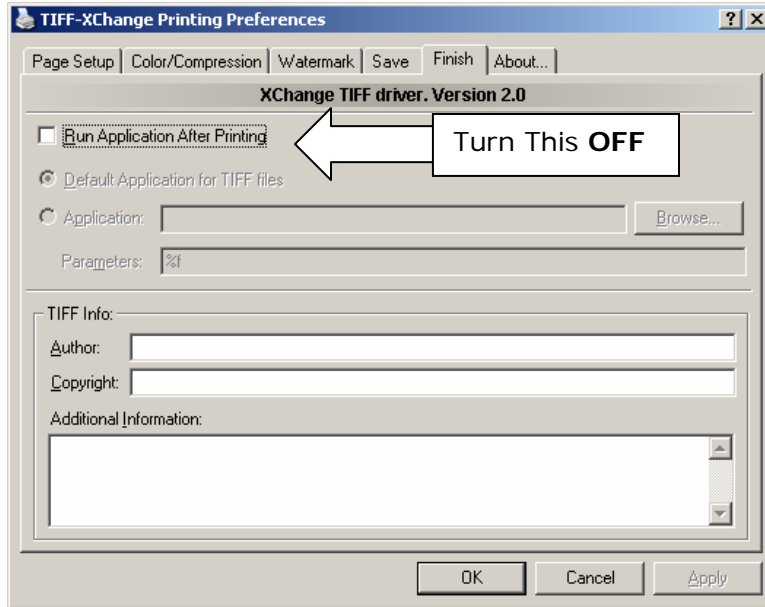
Documents in Laserfiche Repository



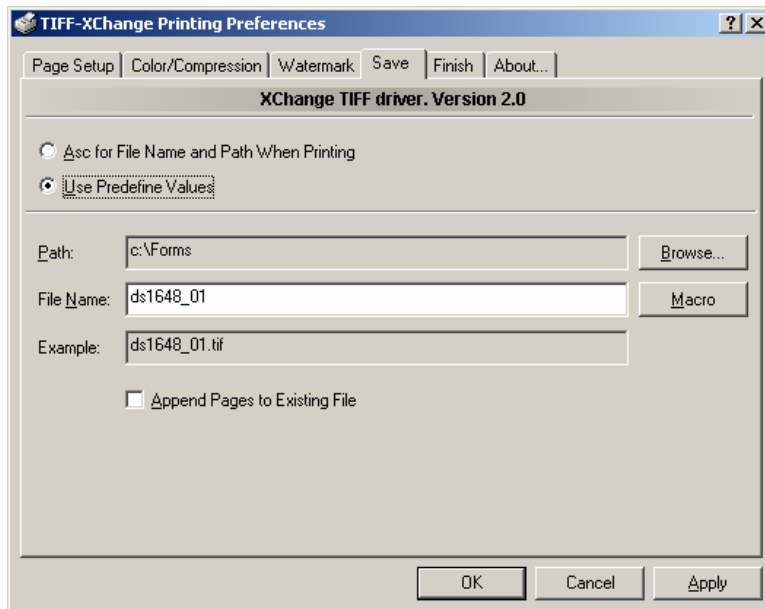
Document plus Meta Data

Configuring TIFF-Exchange Print Driver

- Open “TIFF-XChange” printing preferences
- Move to “Finish” tab
- Set “Run Application After Printing” option to OFF

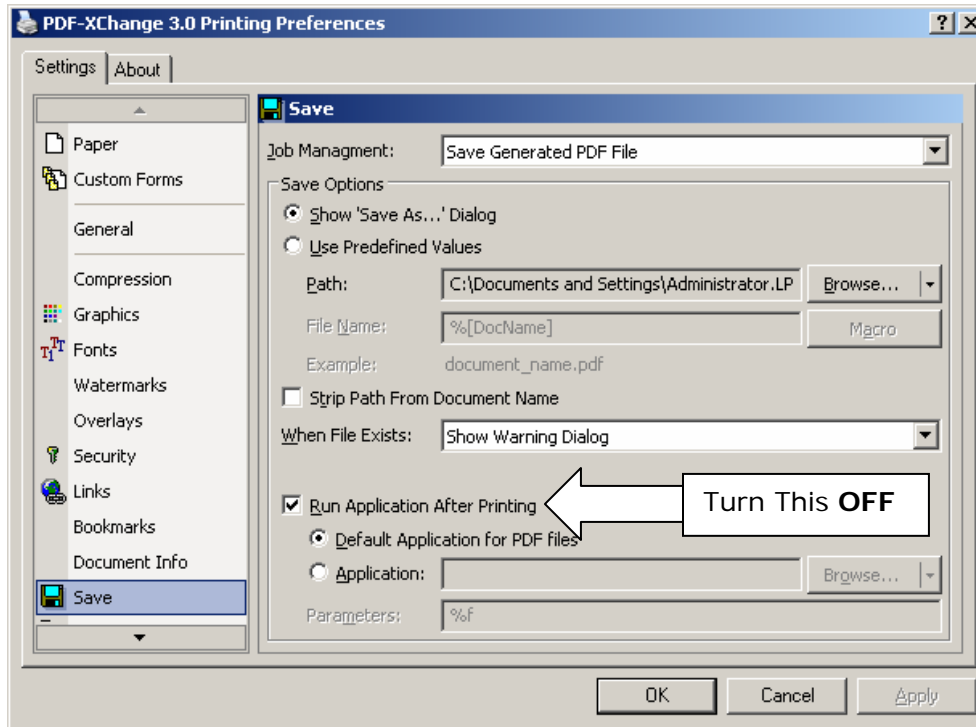


- Move to “Save” tab
- Select “Use Predefined Value” option



Configuring PDF-Exchange Print Driver

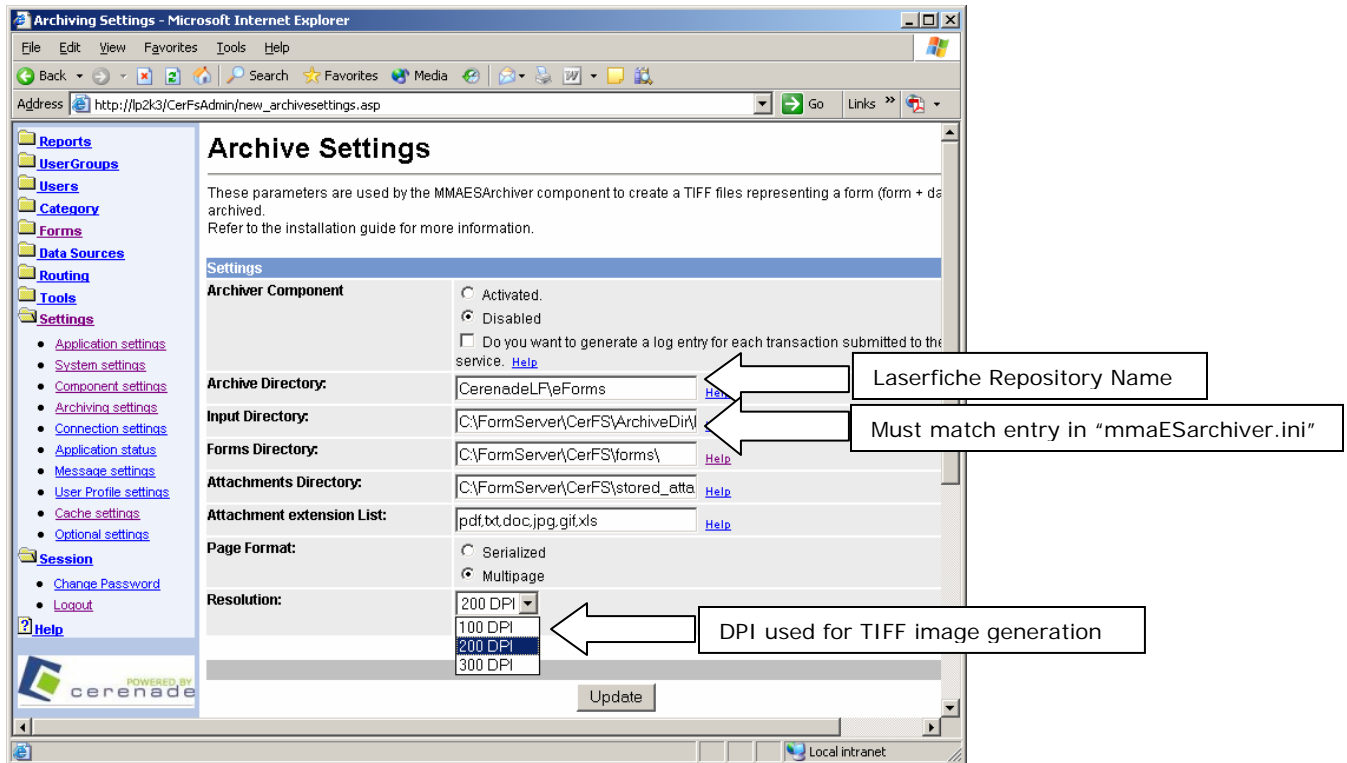
- Open “PDF-XChange” printing preferences
- Move to “Save” tab
- Set “Run Application After Printing” option to OFF



Configuring TIFF Output Resolution

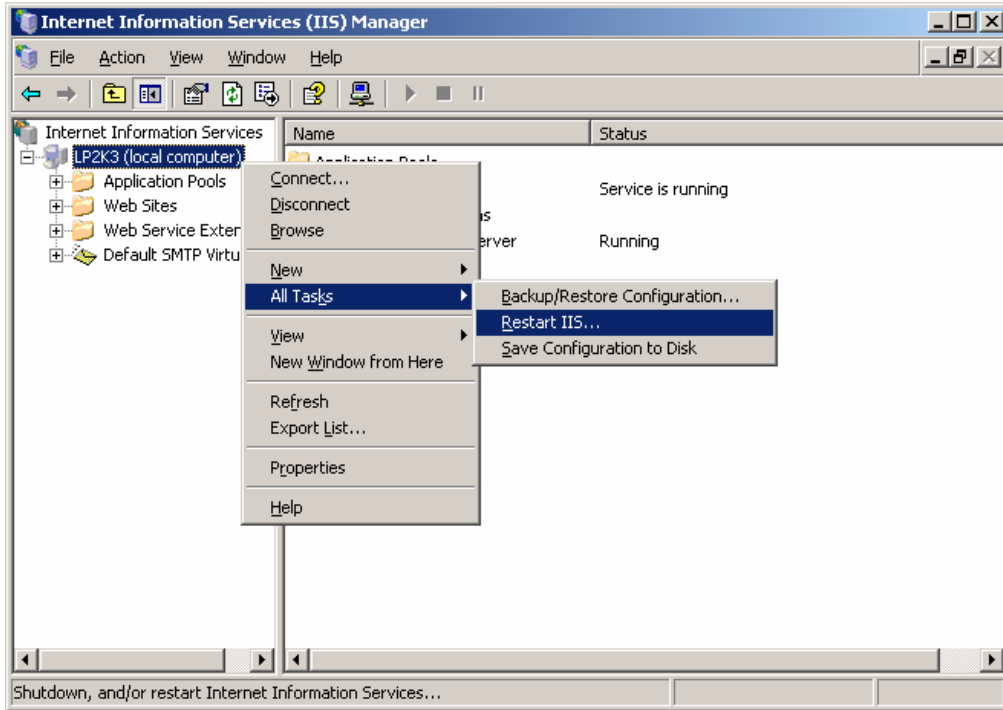
By default, FormsServer generates TIFF output at 100 DPI resolution. To change this setting please follow these instructions:

- 1) Login to FormsServer Administrative console
- 2) Navigate to “Settings | Archive Settings”
- 3) Change TIFF resolution by selecting an option from the “Resolution” drop list
- 4) Click the “Update” button



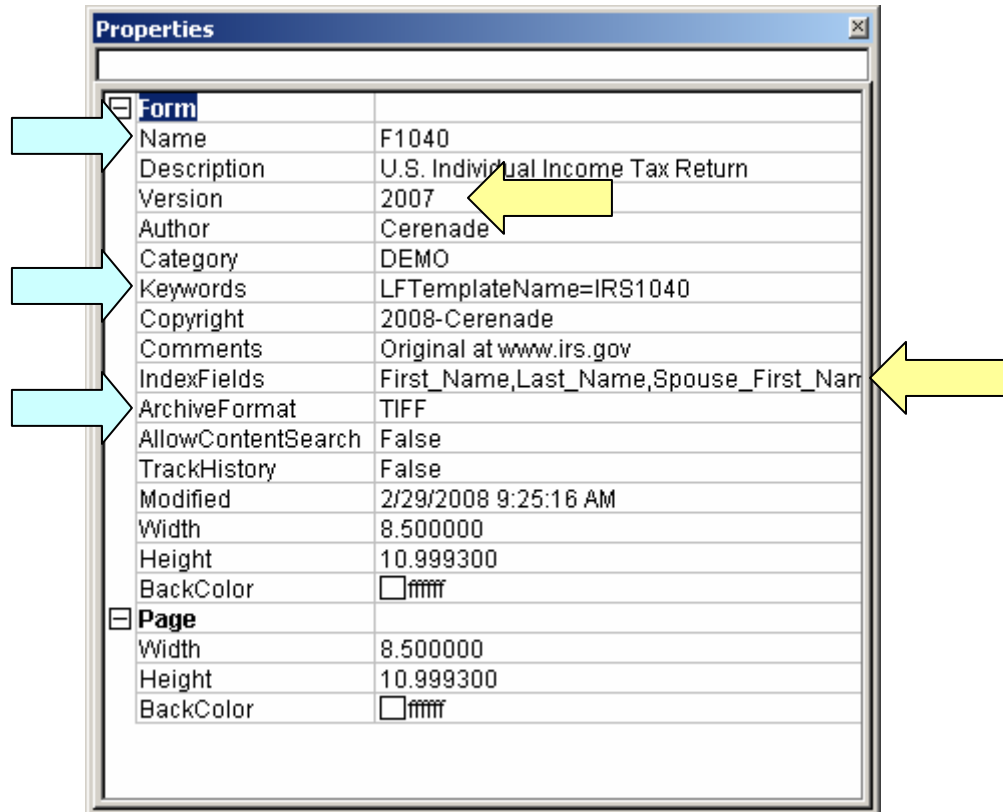
- 5) Log out of FormsServer Administrative Console

- 6) Open up the IIS Manager - located under Windows Administrative Tools
- 7) Restart IIS



How to Set Forms Properties

Several parameters need to be set in the E-form in order for the form to properly archive onto Laserfiche. These parameters are:



Form	
Name	F1040
Description	U.S. Individual Income Tax Return
Version	2007
Author	Cerenade
Category	DEMO
Keywords	LFTemplateName=IRS1040
Copyright	2008-Cerenade
Comments	Original at www.irs.gov
IndexFields	First_Name,Last_Name,Spouse_First_Nam
ArchiveFormat	TIFF
AllowContentSearch	False
TrackHistory	False
Modified	2/29/2008 9:25:16 AM
Width	8.500000
Height	10.999300
BackColor	<input type="checkbox"/> #ffff
Page	
Width	8.500000
Height	10.999300
BackColor	<input type="checkbox"/> #ffff

- 1) Name: Each form has a file name that ends in “.far”, which can be anything. In addition, each form has a “Name” property that needs to be name.
NOTE: Forms that do not have a name assigned to them cannot be added to FormsServer.
- 2) Version: It is important to set the version of a form. This allows FormsServer to keep track of different versions of the same form.
NOTE: Forms that do not have a version number assigned to them cannot be added to FormsServer.
- 3) Keywords: Name of the Laserfiche template should be added here. If this template exists in Laserfiche, it will be used. If not, Cerenade FormsServer will automatically create the template named here. Other keywords such as Save to Laserfiche, Save Local, Email, Archive As PDF, and Archive As XPS can be set by running Cerenade_Enabler client application. (visit www.cerenade.com/enable to download and install Cerenade_Enabler client application.) **NOTE:** Cerenade_Enabler will enable only those options that the customer is licensed for. Cerenade will setup an account on Cerenade Enablement System for each customer.
- 4) IndexFields: Fields named here must have the same name as the fields on the Laserfiche template. If the template is created by Cerenade FormsServer then the names match, if not you must make sure that the field names and field sizes match between the E-form and the Laserfiche template. Cerenade FormsServer will use the IndexFields to populate fields on the Laserfiche template.

NOTE: IndexFields must be updated if you rename or remove fields that are referenced in the IndexFields.

- 5) ArchiveFormat: You have a choice of two: PDF and TIFF. Cerenade FormsServer will use the value of ArchiveFormat to determine the format of the document it will save to Laserfiche.
- 6) Other properties in the form are optional.

How to Setup ESArchiver as a Service

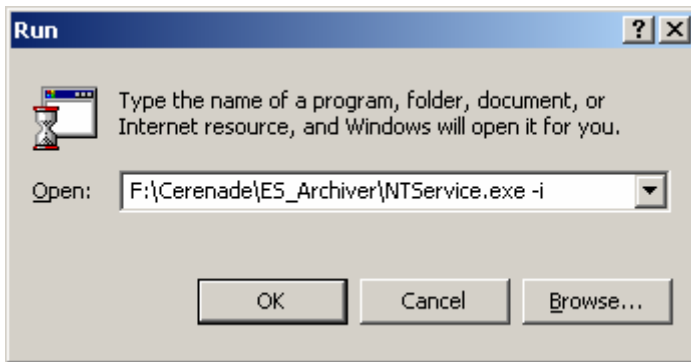
ESArchiver can run in two modes: Application and Service.

It is ok to run ESArchiver as a desktop application. However, you must run the application every time you reboot your server. Setting up ESArchiver as a Service eliminates this requirement.

Note: You cannot run ESArchiver in Application mode and as a Service at the same time.

Follow these instructions to setup ESArchiver as a Service:

- 1) Locate “NTService.exe” – this file should be under “ES_Archiver” folder under the main folder where FormsServer is installed.
- 2) Click on START | RUN
- 3) Type: <fullpath>\NTService.exe -i
- 4) Click **Ok**



Why Forms Do Not Save into Laserfiche?

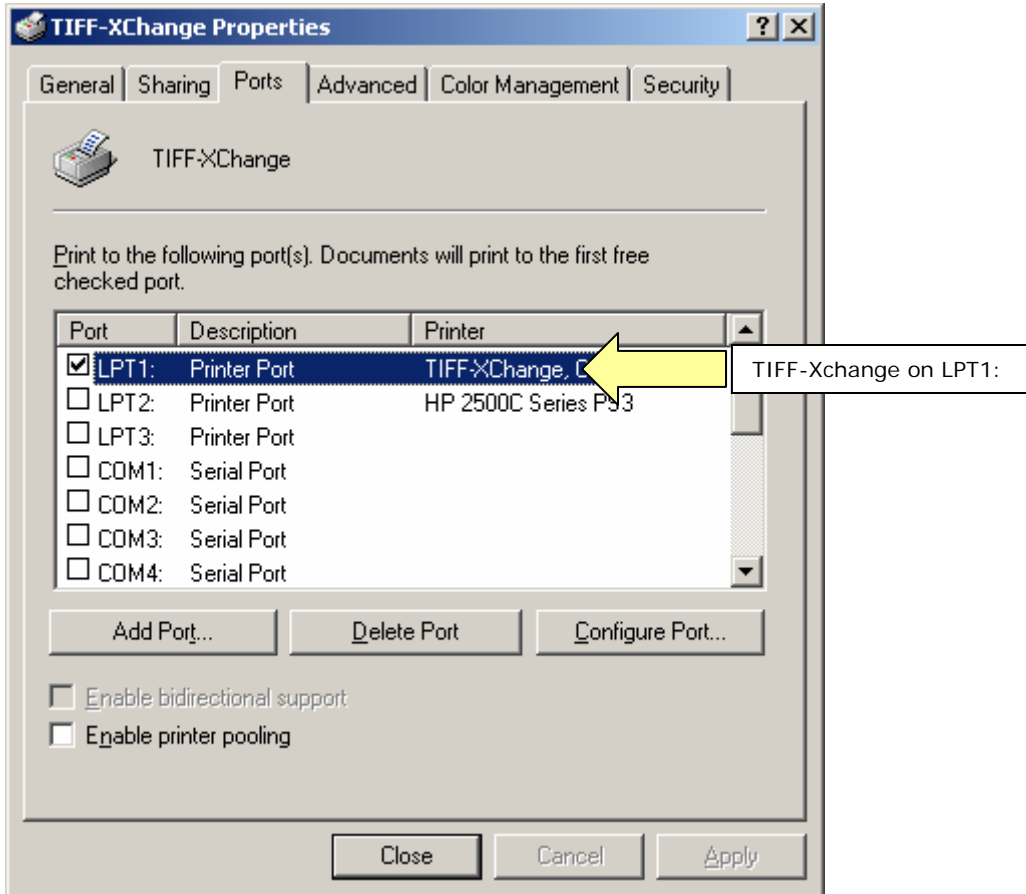
There could be many reasons:

1. Laserfiche client/server services are not running
2. Laserfiche 7.2 Run-time Component (API) is not installed on the server
3. Laserfiche is in Read-Only mode.
4. You do not have the rights to create Documents in Laserfiche (See
5. You do not have the rights to create Templates in Laserfiche
6. Archiver (CerenadeESArchiver Service) is not running
7. Account assigned to CerenadeESArchiver Service does not have FULL Administrative Rights (see “ESArchiver Configuration”).
8. “Run Application After Printing” for Tiff-Xchange printer is ON (see “Configure TIFF-Xchange”)
9. You do not have administrative rights to Laserfiche
10. The right parameters are not set in the forms (see “How to Set Form Properties”)
11. “IndexFields” property of the form is referencing fields that are not present on the form. Update this property in the forms, save, and upload the form to FormsServer.

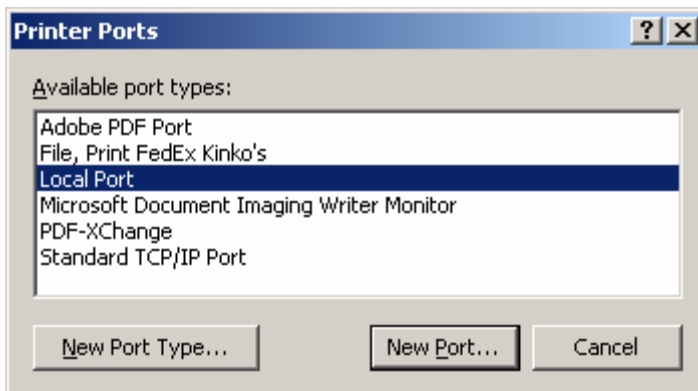
Installation into a Virtual PC

If you plan to archive forms into Laserfiche as TIFF documents, then the TIFF-XChange must be linked to a local port. Follow these instructions to link TIFF-XChange to a local port:

- 1) Locate and open the Properties of “TIFF-Xchange” printer



- 2) Click on **Add Port** button – **Printer Ports** window appears



- 3) Highlight **Local Port** and Click on **New Port** button – **Port Name** window appears



- 4) Type **TIFF-Xchange** in the “Enter a port name:” field and click **OK**
- 5) Click the **Apply** button on the **Properties** window and TIFF-Xchange is now linked to a local port named TIFF-Xchange

