Laserfiche Avante 9.2 Frequently Asked Questions

White Paper

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Laserfiche®

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This paper addresses the most common questions asked about Laserfiche Avante 9.2, and is split into four sections: Laserfiche Avante Basics, Licensing and Activation, Named User and Device Licensing, and WebLink and Public Portal Licensing. Note that this paper does not include detailed directions for setting up and configuring Laserfiche Avante; for that information, see the [Laserfiche Avante 9.2 Deployment Guide](#).

This guide is specific to Laserfiche Avante. For information on Laserfiche Rio, see the [Laserfiche Rio 9.2 Deployment Guide](#) and [Laserfiche Rio 9.2 Frequently Asked Questions](#).

Laserfiche Avante Basics

What's the difference between a Laserfiche Avante installation and a Laserfiche Rio, Team, or United installation?

Laserfiche Avante is a Laserfiche product package that includes the Laserfiche Client and Server, Workflow, Snapshot, the E-mail Plug-in, and the Web Administration Console. Like Laserfiche Rio, Laserfiche Avante gives you powerful, flexible tools for working with your information, but Laserfiche Avante is designed for smaller, single-server sites. Unlike Laserfiche Rio, which includes Web Access and unlimited Servers and repositories, Laserfiche Avante does not come with Web Access (although you can license it separately), and additional Laserfiche Servers and repositories must be licensed separately.

Laserfiche Avante uses named user licensing. This means that a license is reserved for each user or device, ensuring that all members of your organization can log in whenever they need to. In addition, Laserfiche Avante supports Public Portal licenses for retrieval-only access through WebLink.

What products and features are included with Laserfiche Avante?

Laserfiche Avante includes the Laserfiche Server (including the Full-Text Search engine and all Server utilities), the Laserfiche Client and associated components (including the desktop Administration Console, PhotoDocs, and Scanning), Laserfiche Workflow, Laserfiche Snapshot, and the Web Administration Console. It also includes the E-mail Integration feature. Other products and features can be licensed separately.

Laserfiche Avante comes with one Laserfiche Server and repository. Additional Servers and repositories can be licensed separately.

What are named user licenses?

Laserfiche Avante licensing is based on the number of people who will be using the system, which makes it possible to calculate the cost of most

systems by doing little more than counting employees. Each license is assigned to an individual member of your organization who will always have a connection to Laserfiche reserved.

Named user licenses can be allocated in three ways: to Windows or LDAP users as Directory Named Users, to Laserfiche users as Repository Named Users, or to individual computers as Named Devices. For more information, see [Named User and Device Licensing](), below.

What is a public portal license?

Because a WebLink installation may be accessed by the public, it is not feasible to allocate Named User licenses to everyone who will need to access the repository through WebLink. With a Public Portal license, you can make your repository available for public access using WebLink. Connections made using public portal licenses are retrieval-only, meaning they can be used to view documents but not edit them.

Public portal licenses may allow a specific, limited number of connections, or unlimited connections, depending on the public portal type you have licensed. Large numbers of connections will eventually affect server performance. If you have chosen to use an unlimited public portal license, you must have one public portal license for each CPU on the Laserfiche Server computer that WebLink will connect to. Public Portal Licenses may only be used with WebLink; they are not available for other applications.

For more information, see [WebLink and Public Portal Licensing](), below.

How can administrators log in to test workflows and security configurations?

If an administrator wants to log in as a dedicated, limited-access test user in a Laserfiche Avante system, they could do so by creating an additional test domain account and adding it as a named user. However, this would require the testing user to log out of Windows and then log back in as the test user, and would use an additional named user license for as long as that account is used. There are two alternate mechanisms to work around this issue.

First, if you have a license available, you could assign the license to a named device and use that device as a test station. You could then create a test Laserfiche trustee and log in to the repository on the named device computer to test your configuration.

Second, you could allocate a named user license to a Laserfiche user, and then log in using that Repository Named User account. This user would only be able to log in to the repository they were created in. However, you could remove the named user license from the user and allocate it to a different test user in another repository if necessary.

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Can I use legacy products with named user licensing?

License checking is handled by the Laserfiche Server, and Laserfiche Avante is supported on Laserfiche Servers of version 8.1 and later. This means that any product that is compatible with a Laserfiche Server of version 8.1 or later will also support named user licenses. For example, since Laserfiche 6 Clients are compatible with the Laserfiche 8 and 9 Server, they are also compatible with Named User licenses. However, since Workflow 7 is not compatible with Laserfiche 8 or 9, it is also not compatible with named user licenses. Refer to the Product Compatibility List on the Laserfiche Support Site to determine whether your legacy product is compatible with the Laserfiche 8 Server.

While versions 7, 8 and 9 of the Laserfiche Administration Console are compatible with the Laserfiche Server 9, certain important tasks cannot be performed on an Administration Console prior to Laserfiche 8.1. Specifically, you cannot allocate named user licenses using a Laserfiche 8.0 or earlier version of the Administration Console. You will therefore need to install at least one Administration Console of version 8.1 or higher to administer your Laserfiche Avante installation. We strongly recommended that you use the Administration Console (whether the desktop or Web Administration Console) that matches your Laserfiche Server version, even if you are using legacy versions of other client applications.

Note that some features may not be available if you connect using an earlier client application. For example, the callout text annotation type was introduced in Laserfiche 8.0. If a user using the Laserfiche Client 7.2 opens a document with a callout annotation, they will not be able to either see the callout annotation. They will also not be able to create callout annotations on documents. However, the user will be able to view and work with the document in other ways, and the callout will remain on the document, visible to users with the Laserfiche Client 8.0 or later. Modifying the document with the 7.2 Client will not remove the annotation.

What LDAP schemas does Laserfiche support?

Laserfiche support Microsoft Active Directory, Novell eDirectory, and RFC 2307 compliant schemas. Other schemas are not supported. No updates or customizations are necessary beyond the base schemas defined by those standards.

Licensing and Activation

Do I need an activation key or a license file to install my product?

When you install Laserfiche products, you will need to provide license information. You will be prompted to provide an activation key or license file during installation. Several products accept both license files and activation keys, but in most cases, you will only have one or the other.

For a complete listing of which products use activation and which use license files, see Knowledge Base article [1012847](): INFO: Determining Whether You Need An Activation Key Or A Pre-Generated License File For Current Release Versions of Laserfiche Product Installations.

> **Note**: Although many products will generally be licensed using an activation key, they are all also capable of reading lf.licx license files. For example, if another administrator performs a remote activation of the Laserfiche Server for your computer, they may send you the resulting license file. You can use the license file to install the Laserfiche Server.

Where can I find my activation keys and license files?

Both activation keys and license files can be downloaded from the [Laserfiche Support Site](). Once you have logged in, you can follow the **My Activation Keys** and **My License Files** links.

Activation Keys

The Activation Keys page will list all of your products. If an activation key has not been generated for a product, you can generate it by clicking Generate Key. Once a key has been generated, it will be displayed in blue. If a product has more than one serial number (for instance, if your site is licensed for two separate Laserfiche Servers), you will need to generate a different key for each serial number.

License Files

Your license files will be downloaded as a zip file containing all of your available product licenses. (Products for which you have an activation key will not be included.)

How can I activate a computer that doesn't have access to the Internet? Can I activate a computer remotely?

Licensing using an activation key requires a connection to the Internet. If the computer on which you will be installing your product is not connected to

the Internet, you can perform the activation on another computer that is connected to the Internet. You can also use this procedure to perform remote activations. See Knowledge Base article 1012198: INFO: Offline Activation For Laserfiche Products.

How should I update my installation when I license new features or named users?

If you license new features (such as Records Management Edition or Digital Signatures) or add new named users or public portals, you will need to update your Server license. You can do so by reactivating your Server using the Activation Utility. You will then need to restart your Laserfiche Server service. You do not need to reinstall the product. For more information, see the Laserfiche Activation and Licensing whitepaper.

I'm moving my installation from one computer to another. How will activation affect this process?

You can deactivate an installation in order to reactivate it on another computer. (Deactivation is not necessary to reinstall or repair the software on the same computer.)

In most cases, deactivation will happen automatically when uninstalling the product. You can simply uninstall the product on the original computer before you activate it on the new computer. However, in some cases you may need to manually deactivate. For instance, the computer you are deactivating may not be connected to the Internet, or you may be reinstalling on a new computer because the old computer is no longer accessible.

You can manually deactivate by following the steps in Knowledge Base article 1012301: HOW TO: Deactivating Laserfiche Products.

Named User and Device Licensing

What types of named user accounts are supported?

There are three types of named user licenses: Directory Named Users, Repository Named Users, and Named Devices. All of these named users are allocated from the same license pool. You do not need to purchase device licenses separately from named user licenses, for instance.

A single named user license of any of the following types can support up to four simultaneous connections. This means that, for example, a single user could have the Laserfiche Client, Quick Fields, Workflow and an integration script running at the same time, using a single named user license.

Directory Named User

A Directory Named User is a named user license allocated to a Windows Account or LDAP user. It can be used to connect to any repository on your Laserfiche Server. For example, if the Windows user DOMAIN/JSmith has been allocated a Directory Named User license and the site has two repositories, he can use that single allocated license to log in to either repository.

Repository Named User

A Repository Named User is a named user license allocated to a Laserfiche user. It is specific to a single user in a single repository, and is not shared between repositories, because the user object to which it is assigned only exists in one repository. For example, if the Laserfiche user JDoe exists in two repositories, and you want that user to be able to log in to both, you will need to allocate two Repository Named User licenses, one for each repository.

Named Device

A Named Device is a named user license allocated to a particular computer; any user may log in from that computer, but the license will not be available when accessing the repository from any other computer. Like Directory Named Users, Named Devices are not specific to a single repository. For example, if you have a scan station that will be used by multiple scanner operators to scan into two different repositories, you can allocate one Named Device license to that scan station for access to both. Note that Named Device licenses cannot be used with Laserfiche Web Access, WebLink, or the Web Administration Console.

Can users be added to and removed from the named user list?

Yes. You can add users and devices to the named user list by allocating named user licenses to them in the Laserfiche Administration Console, or free up the license by removing them from the list.

Can I license a machine, such as a scanning kiosk, rather than licensing individual users?

Laserfiche has the ability to grant a license to a particular device, enabling any user to log in from that device (up to four simultaneous connections) regardless of whether they have been allocated a named user license themselves. This is helpful if you have a particular task that may be performed by multiple users, but will always be performed on the same computer, such as a scanning kiosk. Note that named devices cannot be used to connect to WebLink or Web Access.

How do I log in to the repository for the first time to set up the domain users associated with my named users?

In order for a user to log in to the Laserfiche Avante system, they must have a named user license allocated to their trustee. However, in order for an administrator to add a user account to Laserfiche, they have to log in to the Laserfiche desktop or Web Administration Console. Thus, it is necessary to be able to connect to the repository once before you have set up your users in the system.

To get around this issue, Laserfiche Avante allows for a special administrative connection that is not associated with a named user license. In a brand-new repository, the only pre-existing user is "Admin," which by default has the Manage Trustees and Set Trustee Privileges privileges and has no password. This enables you to log in as Admin, create Windows account users, and configure password and other security settings. In a migrated repository, you can log in as any user who has either the Manage Trustees or the Set Trustee Privileges privilege. This administrative connection allows only two sessions to Laserfiche, unlike a normal named user or device connection, which allows four.

How do Repository Named Users work?

Unlike Directory Named Users, Repository Named Users are allocated to a specific Laserfiche user, rather than to a Windows user or an LDAP user. This allows you to allocate named user licenses to users who are not on your domain, such as outside contractors. It does, however, have some limitations. Unlike directory named users, repository named users are tied to specific repositories. The user JSMITH in RepositoryOne cannot use his named user license to log in to RepositoryTwo, because the user JSMITH does not exist in

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the second repository. Instead, if he needs to access RepositoryTwo, you will need to create a user is created in that repository allocate another named user license to that user. It is therefore recommended that you use directory named user licenses wherever possible.

Do profiles in Web Access work with named user licenses?

No. Web Access profiles currently require Team or United concurrent user licenses.

Can I add groups to the named user list?

No. Only individual accounts, not groups, can be added as named users.

Windows domain or LDAP directory groups can be marked as named users, but that will simply add each individual user within that group to the list. Once you have added the group members, they will not be automatically updated when the Windows group is changed. This means that if a user is added to or removed from the group, they will not automatically be added to or removed from the named user list. You will have to manually add any additional members to the group.

If you choose to add all members of a group to the named user list, but there are insufficient named user licenses for all group members, group members will be added in alphabetical order until the license limit is reached. For example, if you have three named user licenses available, and attempt to add all members of a group containing Adam, Bob, Jill, and Sandy, named user licenses would be allocated to Adam, Bob and Jill, but because there are only three licenses available, Sandy would not be allocated a license.

When using a device license on a computer, can different users with different security settings access the repository on that same computer?

Yes. Even users who do not have a named user license allocated to them specifically will still log in as a particular user, and their security settings depend on their user settings, not their license. The device license simply allows them to connect to the Laserfiche Server, it does not affect the trustee they will log in as or the security settings configured on that trustee.

When using a device license, does Audit Trail track the user information or just the machine?

As with security, auditing is configured and reported by trustee, not by license. Thus, if two different users log in using the same Named Device but as different trustees, they will be audited separately. In terms of Audit Trail, a user connecting with a device license is no different than a user connecting

with a named user license—Audit Trail monitors what account is logged in, not how it was licensed.

If a user with a named user license connects to a repository on a computer with a device license allocated to it, which license will be used?

When a user connects to a repository, the Laserfiche Server first checks to ensure that they have the appropriate rights to log in to the repository. If they do, the Server will then check if the computer has a device license with connections available. If it does, the user will connect using the device license. If it does not, only then will the Server check whether the user has an allocated named user license.

Do I need to restart the Laserfiche Server service when adding or removing named users?

No. Adding and removing users takes effect immediately and automatically.

Can a single user with a named user license allocated to them use that license to connect to multiple repositories?

A Directory Named User can connect to any repository on your Laserfiche Server, assuming the user has the appropriate repository rights to log in. (Named user licensing does not override trusted or denied status. See [Windows and LDAP Authentication](#) in the Administration Guide for more information.) Named Devices can also be used in this fashion. However, if the named user is a Repository Named User, they will only be able to connect to the repository the Laserfiche trustee was created in.

WebLink and Public Portal Licensing

How does public access via WebLink work with Laserfiche Avante licensing?

A WebLink public portal license allows read-only access to either a specific, limited number of simultaneous users, or unlimited simultaneous users, depending on which public portal license you chose. This allows you to make your WebLink installation available to the public, without needing to allocate named user licenses to them.

If you are using an unlimited public portal license, you must have as many public portal licenses as you have CPUs on your Laserfiche Server computer. For example, if you have a dual-processor Laserfiche Server, you must a dual-processor unlimited named user license for that Server.

If you have a multi-processor server machine but you only want to use one processor, you can purchase a license for a single processor and run the Laserfiche Server on a virtual machine that has been allocated only one. Obviously, doing so will give you reduced performance over using the full two-processor server.

> **Important**: If you are using an unlimited public portal license, the number of public portal licenses you have must match the number of processors on your Laserfiche Server computer. The number of processors on your WebLink Web server is not relevant.

For purposes of determining the number of public portal licenses needed, does a dual-core CPU count as one processor or two?

A dual-core CPU counts as only one processor.

Can one public portal license serve more than one repository on the same Server?

Yes. A single public portal license can be used to allow access to as many repositories as you have on a single Laserfiche Server. You only need additional public portal licenses if you have additional Servers.

How can I specify that a user should connect to WebLink using a Public Portal licensed connection?

Any user (whether a Laserfiche user, a Windows user, or an LDAP user) who has been marked as a Read-Only user in the desktop or Web Administration Console will automatically use the public portal license. (Note that the Manage Trustees privilege overrides Read-Only status.) You should specify that the user is a Read-Only user to enable them to use a public portal connection.

Users who are not marked as Read-Only will not use the public portal license, and therefore must have been allocated a named user license to connect.

Can I configure WebLink so that public users do not have to provide a username and password?

Yes. You can configure WebLink to automatically log visitors in as a particular user. From the user's point of view, it will appear that they did not provide a username or password. (On the back end, the visitors will be logged in as a particular user that you specify. This allows you to configure security, auditing, and other settings for that user.) See [Automatically Log In](#) in the WebLink Administration and Configuration Guide for more information.

If a user is marked as Read-Only and has a named user license assigned to them, when they connect to WebLink, will they use a Public Portal license or their own named user license?

If a user has been marked as Read-Only and has been allocated as a named user license, and then logs in to WebLink, the Laserfiche Server will attempt to connect them using the Public Portal license first. However, if the public portal license is a limited license and all connections are in use, the Laserfiche Server will then connect them using their allocated named user license.

If a user is not marked as Read-Only, what will happen when they connect to WebLink?

If a user is not marked as Read-Only, and has been allocated a named user license, they will not use a public portal connection when connecting through WebLink. However, they will be able to use their named user license to connect to the repository using WebLink. (They will still have read-only access through WebLink, because WebLink does not support read-write access.)

If a user is not marked as Read-Only and has not been allocated a named user license, they will not be able to connect to the repository using WebLink.

When connecting to WebLink using a public portal license, can different users with different security settings access the repository?

Yes. Even users who do not have a named user license allocated to them specifically will still log in as a particular user, and their security settings depend on their user settings, not their license. The public portal license simply allows them to connect to the Laserfiche Server, it does not affect the trustee they will log in as or the security settings configured on that trustee.

> **Note**: If you have configured WebLink to automatically log public users in as a particular trustee, the users will all share the same trustee and the same security settings. However, this is because they are all logged in as the same trustee, not because they are all using public portal licenses.

When connecting to WebLink using a public portal license, does Audit Trail track the individual user actions?

As with security, auditing is configured and reported by trustee, not by license. Thus, if two different users log in using the public portal but as different trustees, they will be audited separately. In terms of Audit Trail, a user connecting with a device license is no different than a user connecting with a named user license—Audit Trail monitors what account is logged in, not how it was licensed.

> **Note**: If you have configured WebLink to automatically log public users in as a particular trustee, they will all be audited collectively. However, this is not because they are using a public portal license. Instead, they are audited collectively because they are all logging in using the same trustee.

Laserfiche Forms Licensing

What user types are supported with Laserfiche Forms?

There are three ways that a user can access Laserfiche Forms.

Full named users can log in using the same user account they use to log in to a Laserfiche repository. These users have full access to Forms, although you can use security settings to restrict their access. Named users do not need to be allocated separately to be used with Forms.

Authenticated participant users are automatically allocated per Forms installation, and can log in to Forms to start process instances and perform user tasks (again, you can use security settings to further restrict their access).

Authenticated participant users cannot create or administer business processes.

If your Forms instance is a **Forms Portal**, public anonymous users can submit publicly published forms. Specify whether a given Forms installation should use a Forms Portal license by using the Forms Portal activation key instead of the standard Forms activation key.

How do I allocate authenticated participant users?

Any authenticated participant users are included in your Forms license when you activate using your activation key. You can then assign them to individuals in the System Security page of your Forms installation.

For more information, see [Installing Laserfiche Forms](#), [Forms Licensing](#), and [Forms Security](#) in the Laserfiche Forms help files.

How do I allocate Forms Portals?

Any Forms Portal instances that you are licensed for will have their own activation keys. Unlike standard Forms activation keys, Forms Portal activation keys may be used only as many times as you have licensed Forms Portals. To install a Forms Portal instance of Forms, simply use the correct license key when installing.

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