Laserfiche Rio 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 Rio, and is split into three sections: Laserfiche Rio and Laserfiche Directory Server Basics, 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 Directory Server; for that information, see the [Laserfiche Rio 9.2 Deployment Guide](#).

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

Laserfiche Rio and Laserfiche Directory Server Basics

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

Laserfiche Rio is a Laserfiche product package that includes the Laserfiche Server and Client, both the desktop and Web Administration Consoles, Advanced Audit Trail, Snapshot, Workflow, Web Access, Web Accelerator, Laserfiche Mobile, the Distributed Computing Cluster preview, and the Social BPM preview. Laserfiche Rio also allows unlimited Server installations and repositories, which gives you flexibility when using Laserfiche for different projects, departments, or sites.

Laserfiche Rio uses named user licensing. This means that a license is reserved for each user, ensuring that all members of your organization can log in whenever they need to. Laserfiche Rio allows you to generate your own licenses from a master license. The Laserfiche Directory Server web application lets you allocate and manage your licenses and installed products, which allows you to extend your Laserfiche suite quickly and easily. Laserfiche Rio also supports Public Portal licenses for retrieval-only access through WebLink.

> **Note**: Laserfiche Rio 9.2 is also compatible with License Manager 8.3. If you have already deployed Laserfiche Rio, you can switch to Laserfiche Directory Server immediately or continue to use License Manager and switch in the future. This paper assumes that you are using Laserfiche Directory Server to manage your licenses; if you are using License Manager, refer either to the License Manager help files or the Laserfiche Rio 9.1 Deployment Guide.

What's the difference between a Laserfiche Rio installation and a Laserfiche Avante installation?

Like Laserfiche Rio, Laserfiche Avante includes the Laserfiche Server and Client, the desktop Administration Console, Snapshot, and Workflow.. However, Laserfiche Avante does not use Laserfiche Directory Server or a master license, and does not include unlimited Server installations and repositories. It also does not include Web Access, Audit Trail, Web Accelerator, Laserfiche Mobile, or the previews of Distributed Computing Cluster and Social BPM. In essence, Laserfiche Avante uses the same licensing scheme as Laserfiche Rio, but is intended for smaller sites.

What is the master license?

The Laserfiche Directory Server's master license determines the features of your system, including the number of users, Laserfiche Server features, and which applications you are authorized to install. It allows a site administrator to create licenses for specific applications (such as Quick Fields or WebLink) and to allocate named user and device licenses. The master license contains information for all of your licensed products and features, as well as your named user and public portal license capabilities.

When you first use Laserfiche Directory Server, you will be prompted to add a master license or obtain one automatically from Laserfiche using an activation key. If you license new products or features, or add more named users, you can update your master license within Laserfiche Directory Server, allowing you to generate licenses for those products whenever you need them.

What are named user licenses?

Laserfiche Rio 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 counting employees. Each license is assigned to an individual member of your organization who will always have a connection to Laserfiche reserved, and each license applies to all servers and other Laserfiche products that make up your Laserfiche installation. Both full and retrieval named user licenses are available.

Named user licenses can be allocated in three ways: to Windows or Novell eDirectory 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, a Laserfiche

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Server allows public access using WebLink. Connections made using public portal licenses are retrieval connections, meaning they can be used to view documents but not edit them.

Public portal licenses allow either a specified number of concurrent connections, or unlimited connections, but large numbers of connections will eventually affect server performance. If you are using 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.

What user licenses can be used 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. Retrieval named users cannot use their named user accounts to log in to Forms.

Authenticated participant users are allocated per Forms instance when the instance is registered, 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. Since participant users are only used with Laserfiche Forms, they are assigned to individuals on the Forms System Security page for your Forms installation.

If your Forms instance is a **Forms Portal**, public anonymous users can submit publicly published forms. If you are licensed for a limited number of Forms Portals, you should specify whether a given Forms instance should be allocated a Forms Portal license when you register it. If you are licensed for Enterprise Forms Portal, all of your Forms instances can be used as Forms Portals.

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

What is an activation key, and where can I find mine?

Your activation key allows you to retrieve your master license from Laserfiche over the Internet, which in turn allows you to generate individual product licenses. You can obtain your activation key on the Laserfiche Support Site. See [Laserfiche Licensing and Activation]() for more information.

Unlike other editions of Laserfiche, Laserfiche Rio has only one activation key: the activation key used to retrieve the master license. All other licenses

can be generated from the master license without needing to keep track of additional activation keys.

> **Note**: Your activation key is not the same as your serial number. Be sure to provide your activation key (which is twenty-five digits long), and not your serial number (which is sixteen digits long).

What is an application instance? When do I need to register one?

An activation instance is a specific installation of a product registered to a particular computer. For licensed products other than the Laserfiche Client, Workflow and the SDK, you need to register your application instance in order to install a product.

The Laserfiche Server 8.2 and later, Web Access 8.1 and later, Forms 9.0.1 and later, Import Agent 8.1.1 and later, SDK 9.0 and later, ScanConnect 8.3 and later, and all versions of Web Accelerator, Distributed Computing Cluster, and Social BPM allow you to register your application instance directly during installation. You can also register those applications before installing them, but it is not necessary. WebLink, Plus, Quick Fields, Agenda Manager, and previous versions of the products listed above must be registered in Laserfiche Directory Server before you install them. The Laserfiche Client does not require a license for installation as of Laserfiche 8.2 and later; and Workflow 8.3 and later does not require a license if it is connecting to a Laserfiche Rio Server.

Legacy versions of Laserfiche products may have different registration and licensing requirements. See the help files for those legacy versions for more information.

I recently upgraded to Laserfiche 9.2 from a prior version. Do I need to switch to Laserfiche Directory Server immediately?

No. Laserfiche Rio 9.2 is still compatible with License Manager 8.3, and you can continue to use License Manager 8.3 until you are ready to upgrade. We do recommend upgrading, however, as Laserfiche Directory Server features a more user-friendly interface, as well as additional tools such as organizations for managing large sites.

I am upgrading from License Manager 8.3 to Laserfiche Directory Server. Can I import my license database as part of this upgrade?

Yes, you can import your license database; you do not need to re-allocate all of your licenses during upgrade. If you install Laserfiche Directory Server on the same computer as your License Manager Server 8.3, Directory Server will replace your existing License Manager installation..tThe Directory Server

administration website allows you to import a License Manager database file when you create your license site.

Should I back up Laserfiche Directory Server?

It is a good idea to back up your Laserfiche Directory Server database frequently. While it does not contain any repository information, your Laserfiche Directory Server database does contain all of your product instance registrations and your allocated licenses; if you lose this information, you will need to reconfigure all of those settings. As part of your standard maintenance plan for Microsoft SQL Server, also include a section to backup the Directory Server licensing database.

Can Laserfiche Directory Server be run on a virtual machine?

Yes, Laserfiche Directory Server can be installed and run on a virtual machine. If you are using notifications (which are recommended, and enabled by default), you should ensure that the virtual machine can access your Laserfiche Server computers and vice versa. The virtual machine must also be able to access the Internet if you want to request a master license over the Internet.

How many Server instances and repositories can I install?

Laserfiche Rio allows unlimited Server instances and repositories; you can install as many Servers as you want, and have up to 15 repositories per Server. Each Server should have its own dedicated computer to avoid resource competition and performance issues, and that increasing the number of repositories on a single Server may result in performance issues, especially if those repositories are large or in constant use.

Can I update my master license when I license new products or features?

Yes. You can automatically update your master license by re-activating your master license. New products or features that you have licensed will be added to your Laserfiche Directory Server database and will be available for registration and allocation at that time.

Can I move my Laserfiche Directory Server installation to another computer?

Yes. To move Laserfiche Directory Server to another computer, you will need to detach your licensing database or uninstall Laserfiche Directory Server on the original computer, install Laserfiche Directory Server on the new computer, and reattach your licensing database.

If I have multiple servers in different locations, will they work with Laserfiche Rio?

Laserfiche Rio is designed to support multiple Laserfiche Servers at your installation, as long as they can contact the Laserfiche Directory Server twice a day to maintain and synchronize with the Windows Active Directory list. If the machine hosting a component of Laserfiche Rio software, specifically the Laserfiche Server, cannot connect to the Laserfiche Directory Server, connection will be attempted for 7 more days. If the two servers still can't communicate, the Laserfiche Server will stop functioning normally, and users will be unable to access their Laserfiche products, though the Laserfiche Server can be started for an hour at a time, to allow users brief access to their data.

Note that, in order to use notifications to automatically synchronize your Laserfiche Servers with Laserfiche Directory Server, your Laserfiche Servers must remain in contact with the Laserfiche Directory Server.

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 Rio system, they can do so by creating an additional test domain account and adding it as a named user. However, this requires the testing user to log out of Windows and then log back in as the test user, and uses 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 can assign the license to a named device and use that device as a test station. You can then create a test Laserfiche trustee and log in to the repository on the named device computer to test your configuration.

Second, you can allocate a named user license to a Laserfiche user, and then log in using that repository named user. This user will only be able to log in to the repository they were created in. However, you can remove the named user license from the user and allocate it to a different test user in another repository if necessary. Because they are not as flexible as directory named users and named devices, and because they require more administrative work to maintain, we do not recommend using repository named users.

Can I use legacy products with named user licensing?

User license checking is handled by the Laserfiche Server, and Laserfiche Rio is supported on Laserfiche Servers of version 8.0.1 and later. This means that any product that is compatible with a Laserfiche Server of version 8.0.1 or later will also support named user licenses. For example, since Laserfiche 6

Clients are compatible with the Laserfiche Server 8 and 9, they are also compatible with Named User licenses. However, since Workflow 7 is not compatible with Laserfiche 8 and 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 Server.

> **Note**: We strongly recommend using the same version of the Laserfiche Administration Console (either desktop or web) as your Laserfiche Server.

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 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 the Laserfiche Server support?

Laserfiche Server supports Microsoft Active Directory and Novell eDirectory. Other schemas are not supported. No updates or customizations are necessary beyond the base schemas defined by those standards.

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

When you license new features or add named user licenses to your installation, you will need to update your master license. This will add the new features and user licenses to your licensing database. You can update your master license by providing your activation key again in the Laserfiche Directory Server.

Once you have updated your master license, you will need to update your application licenses to update affected applications. For example, if you add a Laserfiche Server feature, you will need to update your Laserfiche Server license or licenses. If you add a Quick Fields feature, you will need to update your Quick Fields license or licenses. However, adding a Quick Fields feature will not require you to update your Web Access licenses.

Note that it is not necessary to update your Laserfiche Server licenses to add more named user licenses to your site, as named user licenses are managed centrally in the Laserfiche Directory Server. You will need to update your

Server licenses to allocate more repository named users to a particular Laserfiche Server, however.

For further information and instructions, see "Update a Master License" and "Update an Application License" in the [Laserfiche Rio 9.2 Deployment Guide](#).

My Laserfiche Servers were generated with the same serial number. Is this an error?

No. Unlike other editions of Laserfiche, Laserfiche Rio does not require unique Laserfiche Server serial numbers on the same network. You will not encounter errors or problems when installing multiple Laserfiche Servers with the same serial.

This has added benefits when working with certain client applications. Some client applications, such as Quick Fields, are linked to a specific serial number. Because Laserfiche Rio installations use the same Server serial number, one installation of one of these client applications can connect to different repositories on different Laserfiche Servers.

Can I control who can perform what actions in Laserfiche Directory Server?

Yes. You can determine who can log in to the Laserfiche Directory Server Web Administration Console, and you can also determine who can perform maintenance tasks, view license settings, and allocate or remove licenses. See [Controlling Access to a Licensing Site](#) for more information.

Named User and Device Licensing

What types of named user licenses are available?

There are three types of named user licenses: directory named users, repository named users, and named devices. All named users are allocated from the same license pool. You do not need to purchase device licenses separately from named user licenses.

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 Novell eDirectory user. It can be used to connect to any Laserfiche Server or repository at your installation. For example, if the Windows user DOMAIN/JSmith has been allocated a directory named user license and the site has two repositories on two different Laserfiche Servers, JSmith 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 repository user. First, you allocate a specific number of repository named user licenses to a specific Laserfiche Server. Then, you assign each license to a single user in a single repository. It is not shared between repositories, because a repository user object only exists in one repository. For example, if the repository 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. This is true even if they are on the same Laserfiche Server.

> **Important**: Because they are not as flexible as directory named users and named devices, and because they require more administrative work to maintain, we do not recommend using repository named users. If you do need to use repository named users, we recommend limiting them only to users who do not or cannot use Windows Accounts or Novell eDirectory accounts.

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 repositories. Note that named device licenses cannot be used with Laserfiche web applications. In addition, retrieval licenses cannot be allocated to named devices.

> **Tip**: Because they offer the most flexibility, can be used with multiple repositories across your installation, and do not need to be reserved for specific Laserfiche Servers, we strongly recommend using directory named users or named devices whenever possible. Repository named users should only be used when it is not possible to use a directory account or reserved device.

What are full and retrieval named user licenses?

Named user licenses may be either full or retrieval licenses. A full license permits a user to both view and modify information in the repository. A retrieval license only permits a user to view information in the repository; a user with a retrieval license cannot make changes to repository contents or add new contents to the repository. All three types of named user licenses, above, may be either full or retrieval.

What's the difference between a retrieval named user and a read-only user?

There are two ways to restrict a user to read-only access to your repository. You can allocate a user a retrieval license, or you can flag the user as a read-only user. The two are not the same process, although you can perform both on the same user.

In both cases, the user will be able to log in to the repository and view documents (assuming they have sufficient rights to do so), but will not be able to modify the contents of the repository. Marking a user as read-only affects only the repository in which the setting is configured, whereas granting them a retrieval license affects their access to all repositories. Marking a user as read-only has an additional effect: if a user is marked as read-only, and they connect through WebLink to a Laserfiche Server with a public portal license, they will connect using that public portal license. See [WebLink Public Portal Licensing](#) for more information.

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The two are completely unrelated. A user may be marked as read-only and not have a retrieval license, or may both be marked as read-only and have a retrieval license.

For example, you might want a particular user to only have read-only access to one repository, but to have full access to another repository. You would not want to allocate them a retrieval license, as that would restrict their access to all repositories, but you could grant them a full directory named user license and then mark them as read-only in the repository they should not be able to modify.

How can I allocate the different types of named user licenses?

Full and retrieval licenses make up two distinct license pools. Once you have allocated all your full licenses, you cannot allocate any more even if you still have retrieval licenses to allocate, and vice versa.

However, within those license pools, you can allocate the licenses however you like. You can allocate one full named user license to a directory named user, a repository named user, or a named device. If you have allocated a full license to a directory named user, you can later remove it from that user and allocate it to another user or device. The same is true for retrieval licenses.

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, or free up the license by removing them from the list. You can also use Active Directory group synchronization to automatically add and remove group members to the named user 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. 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 Laserfiche web applications. In addition, retrieval licenses cannot be allocated to named devices.

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 Rio system, they must have a named user license allocated to their trustee. An administrator must also add a user account to Laserfiche. To do so, the administrator has to be able to log

in to the Laserfiche desktop or Web administration console. How can the administrator connect to a repository when there is no named user license assigned to the administrator's account?

To get around this issue, Laserfiche Rio 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 the 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 connections to Laserfiche, unlike a normal named user or device connection, which allows four.

Do I need to generate a new Laserfiche Server license after adding new named users?

No. If you have notifications enabled, the Laserfiche Directory Server will automatically contact the Laserfiche Servers and update the named user list. (Notifications are enabled by default, and are recommended.) If you do not have notifications enabled, the update will occur when you next restart your Server service. In neither case do you need to generate a new license.

If you need to allocate additional repository named users, however, you will need to generate a new license.

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 a Novell eDirectory 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.

In order to configure repository named users, you must first allocate a block of named user licenses to the Laserfiche Server on which you want to create repository named users. These licenses are reserved specifically for repository named users on that Laserfiche Server, and cannot be used by repository named users on other Laserfiche Servers, or directory named users or named devices on any Laserfiche Servers. You should allocate exactly as many repository named users to a Laserfiche Server as you need: too few and you will not be able to configure the repository named users as you need, but too many will tie up licenses so that they cannot be used elsewhere.

Unlike standard named users, Laserfiche 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 in that repository and allocate another named user license to that Laserfiche Server.

This is why we recommend using directory named user licenses wherever possible, as they are more flexible and can be used across your installation.

What is an organization?

Organizations allow you to reserve a set number of named user licenses and application licenses for a specific department or group of people, and to assign [security](#) to grant other users with the ability to manage licenses within that department or sub-departments. For instance, you might want to reserve a block of licenses for the exclusive use of a particular department, or allow a user to manage licenses for their department but not others. You can create organizations to do this.

Do profiles in Web Access work with named user licenses?

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

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 allocated to them 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. If it does, the user will connect using the device license and, if so, if the device license has sessions available. If it does not, only then will the Server check if the user has an allocated named user license.

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

If you have Laserfiche Directory Server notifications enabled for the Laserfiche Server, you do not need to restart the Server to add or remove a user. (Notifications are recommended, and are enabled by default.) If you have disabled Laserfiche Directory Server notifications, you will need to restart the Laserfiche Server service after you have added or removed a named user for the change to take effect.

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

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.

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WebLink and Public Portal Licensing

How do I set up WebLink public access?

A WebLink public portal license allows read-only access to either a specific number of concurrent 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 public portal 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.

Is a public portal license required for each Laserfiche Server I will be using with WebLink?

No. Users can connect to repositories on Laserfiche Servers without public portal licenses allocated to them, as long as those users have been allocated named user licenses.

For example, you might have three repositories on three Laserfiche Servers, one of which will be accessible to the public using WebLink and two of which will only be used internally. The Laserfiche Server that will be accessed by the public needs a public portal license to allow those public users to connect. However, the other two, which will be used only for internal access, do not need public portal licenses: internal users can connect using their own allocated named user licenses. If all three repositories need to be accessible by the public, however, all three Laserfiche Servers would need public portal licenses.

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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, and does not require a dual processor or multiprocessor public portal license.

You can determine exactly how many CPUs are on a computer for purposes of public portal licensing using the countcpu.exe command-line utility. See Knowledge Base article 1012643: HOW TO: Using the countcpu.exe Command-line Utility to Preview How Laserfiche Server Counts CPUs for more information.

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.

Can one public portal license be used for two repositories on two different Servers?

No. You must purchase separate public portal licenses for each Laserfiche Server you will be using with for public access with WebLink.

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 a Novell eDirectory 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 must be allocated a named user license.

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.

I have a Laserfiche Server installation intended for testing purposes, and want to test it with WebLink. Do I need a public portal license for my test Server?

No. Because you can connect to WebLink using your own named user license, you do not need a public portal license for testing purposes. You can connect to your Laserfiche Server via WebLink using your named user license.

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

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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. Retrieval named users cannot use their named user accounts to log in to Forms.

Authenticated participant users are allocated per Forms instance when the instance is registered, 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. Since participant users are only used with Laserfiche Forms, they are assigned to individuals on the Forms System Security page for your Forms installation.

If your Forms instance is a **Forms Portal**, public anonymous users can submit publicly published forms. If you are licensed for a limited number of Forms Portals, you should specify whether a given Forms instance should be allocated a Forms Portal license when you register it. If you are licensed for Enterprise Forms Portal, all of your Forms instances can be used as Forms Portals.

How do I allocate authenticated participant users?

Authenticated participant users are allocated on a per-installation basis for Laserfiche Forms. When you register a Forms instance, either through the Forms installation or in Laserfiche Directory Server, you can choose to allocate some of your authenticated participant pool to that Forms instance. 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?

If you have a limited number of Forms Portals, you can allocate them when registering a Forms instance, either through the Forms installation or in Laserfiche Directory Server. When the product is installed using that registration, it will automatically be installed as Forms Portal.

If you have Enterprise Forms Portal, all of your Forms installations automatically support Forms Portal. You can determine whether to make a

given instance public or not by setting form access in the Access Rights tab of a process.

Laserfiche®

Laserfiche Rio 9.2 Frequently Asked Questions
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Author: Constance Anderson, Roger Wu
Editor: Tammy Kaehler
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Description:
This paper provides answers to frequently asked questions about Laserfiche Rio 9.2 and named users.

Compulink Management Center, Inc.
Global Headquarters
3545 Long Beach Blvd.
Long Beach, CA 90807
U.S.A

Phone: +1.562.988.1688
www.laserfiche.com