

Overview

The Laserfiche Integration allows for Gimmel Physical records of various types to be linked with Laserfiche documents, making these records searchable within Laserfiche. When records are created, updated, deleted, or expunged in Gimmel Physical, the same changes are made to the corresponding items in Laserfiche.

Configuring the Laserfiche Integration

The Laserfiche CMIS Gateway must be installed and correctly configured for the Laserfiche Integration to work. Please see documentation from Laserfiche for completing this step. Once the CMIS Gateway is in place, configure the following settings on the Application Settings page in Gimmel Physical:

- *Laserfiche CMIS Gateway URL* – The service URL of the CMIS Gateway browser binding service (e.g. <https://example.domain/lfcmis/browser>).
- *Laserfiche Repository* – The name of the Laserfiche repository.
- *Laserfiche Username* – The username of the dedicated account that Gimmel Physical will use to connect to Laserfiche. At a minimum, this account should possess sufficient rights to create, update, move, and, and delete documents.
- *Laserfiche Password* – The password of the dedicated account that Gimmel Physical will use to connect to Laserfiche.

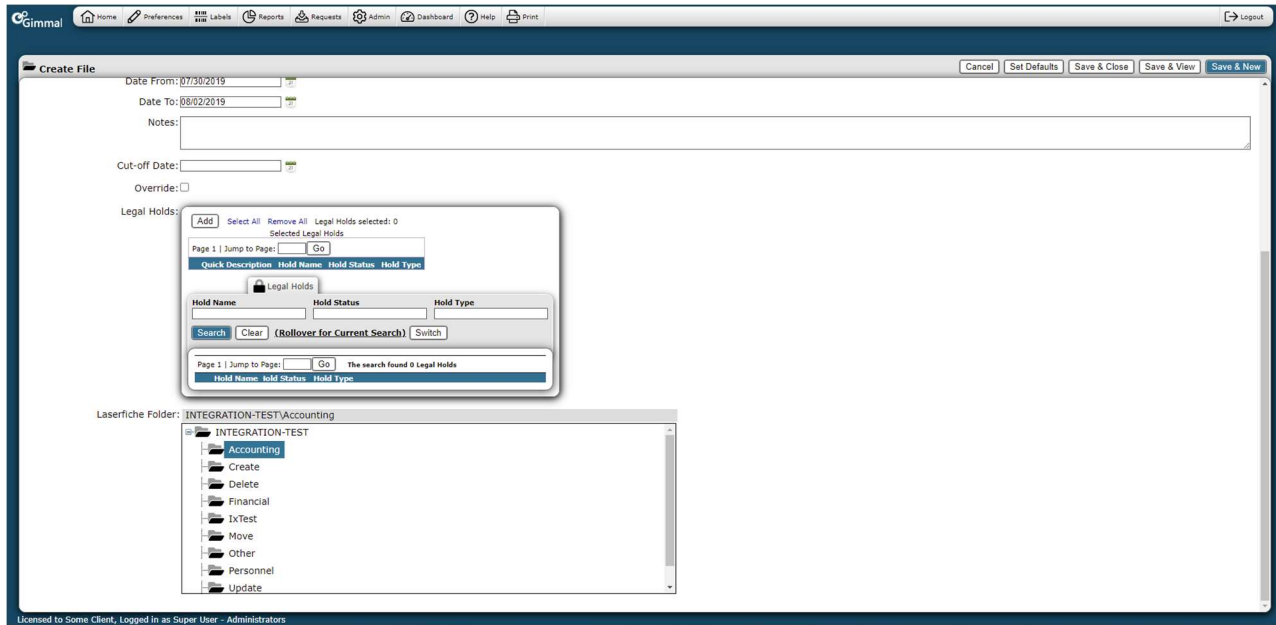
To finish configuring the Laserfiche Integration, go to the Admin menu and select Laserfiche Integration. Access to this page is governed by role permissions, so the Configure Laserfiche Integration right must be granted to the role of the user doing the configuration. On the Laserfiche Integration page, select an Gimmel Physical tab and a Laserfiche template, and click the Link button on the right to link the tab with the template. Each tab may only be linked with one template, but multiple tabs may be linked to the same template. To unlink an Gimmel Physical tab from a Laserfiche template, click the Unlink button for the tab's row in the linked tabs grid. To link the fields of an Gimmel Physical tab with the fields of a Laserfiche template, first select the tab in the linked tabs grid. Below, select an Gimmel Physical field and a Laserfiche field, and click the Link button on the right to link the fields. Each Gimmel Physical field may only be linked with one Laserfiche field and vice versa. To unlink an Gimmel Physical field from a Laserfiche field, click the Unlink button for the field's row in the linked fields grid. When the configuration is complete, click the Save button in the top right corner to save changes. Alternatively, click the Close button at any time to discard changes and return to the Admin menu.

The screenshot shows the 'Laserfiche Integration' configuration page. At the top, there is a navigation bar with 'Gimmel' and various menu items like Home, Preferences, Labels, Reports, Requests, Admin, Dashboard, Help, and Print. The main content area is titled 'Laserfiche Integration' and includes a 'Close' and 'Save' button in the top right corner. Below the title, there are two main sections: 'Gimmel Tab' and 'Laserfiche Template'. The 'Gimmel Tab' section has a dropdown menu set to 'Box' and a 'Link' button. The 'Laserfiche Template' section has a dropdown menu set to 'Box' and a 'Link' button. Below these are two tables. The first table, 'Gimmel Tab', has two rows: 'File' (selected with a radio button) and 'Box'. The 'Laserfiche Template' column has 'Infolinx Files' and 'Box' respectively. Each row has an 'Unlink' button. The second table, 'Infolinx Field', has a dropdown menu set to 'Infolinx Field' and a 'Link' button. Below this are two more tables. The first table, 'Infolinx Field', has two rows: 'File Name' and 'Date From'. The 'Laserfiche Field' column has 'File Name' and 'From Date' respectively. Each row has an 'Unlink' button. The second table, 'Date To', has one row: 'Date To'. The 'Laserfiche Field' column has 'To Date' and an 'Unlink' button.

Creating Records Linked to Laserfiche

To create a record that is linked to Laserfiche, go to the Create page, enter data for the record, select a Laserfiche folder at the bottom of the page, and save the record. Creating an Gimmel Physical record

will create the corresponding item in Laserfiche according to the settings configured on the Laserfiche Integration page. The Laserfiche document will be named with the tab and barcode of the Gimmal Physical record (e.g. File – 000000200). It will be placed in the folder that was selected on the Create page.



Updating Records Linked to Laserfiche

Updating the metadata of an Gimmal Physical record will update the metadata of the corresponding item in Laserfiche according to the settings configured on the Laserfiche Integration page. If the Laserfiche folder is changed, the corresponding item will be moved to the new folder in Laserfiche. **If the Laserfiche folder of a Gimmal Physical record is updated but the record was not assigned a Laserfiche folder when it was created, then the item will be created in Laserfiche.**

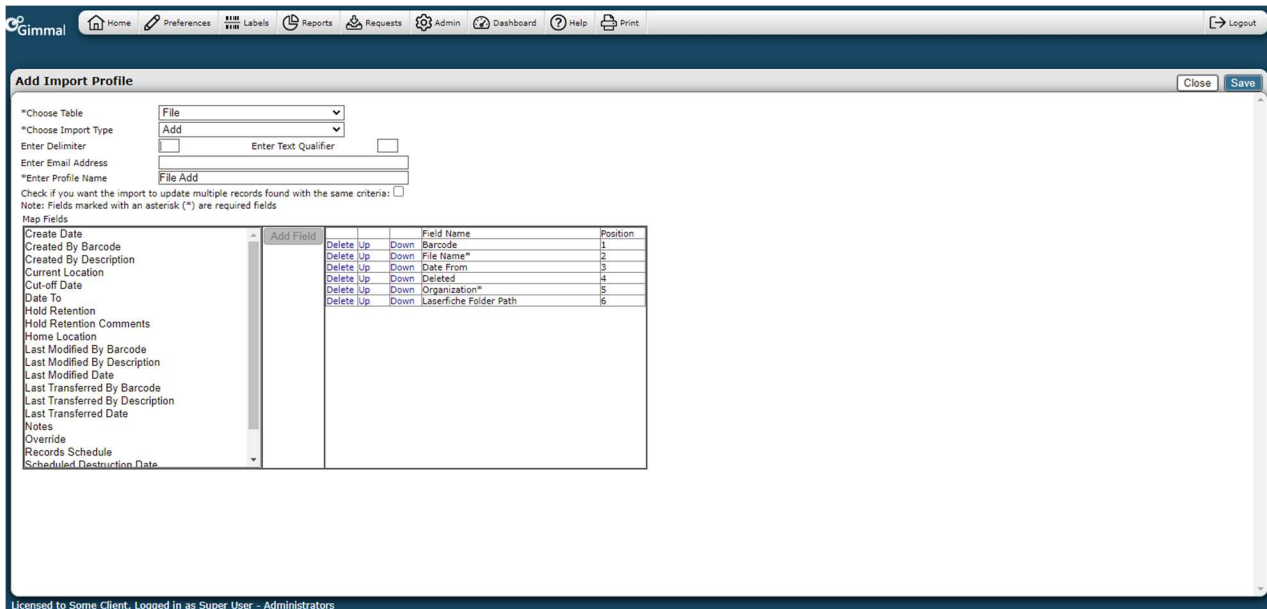
Deleting Records Linked to Laserfiche

Deleting or expunging an Gimmal Physical record that is linked to a Laserfiche item will transfer the item to the Recycling Bin in Laserfiche. However, undeleting such records in Gimmal Physical will not restore the corresponding items to their original folder locations. This must be done manually in Laserfiche.

(Will the records still be linked?)

Importing Records Linked to Laserfiche

To import Gimmal Physical records that are linked to Laserfiche, create an import profile for the linked tab, and select Laserfiche Folder Path as one of the fields. In the import data file, place the full path of the Laserfiche folder in which the items will be created (e.g. IX37\A\Example) in the position of the Laserfiche Folder Path field. Then, execute the import.



Searching by Laserfiche Folder

To search for an item by Laserfiche folder, go to the Detailed Search page and select a Laserfiche folder in addition to any other necessary search criteria, then click the Execute button in the top right corner to execute the search.

