

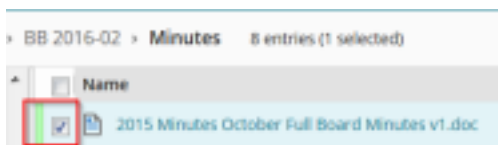
How to Publish Laserfiche Documents to Executive Board Website

398 David Stefan Mon, Jun 19, 2017 [Laserfiche](#) 1402

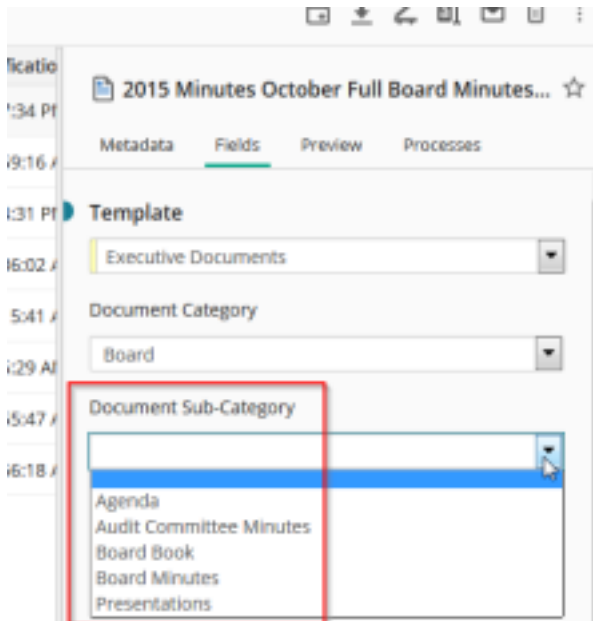
1. Locate files for Board Meetings that should appear on the Board website

Heifer-International > Executive > Board

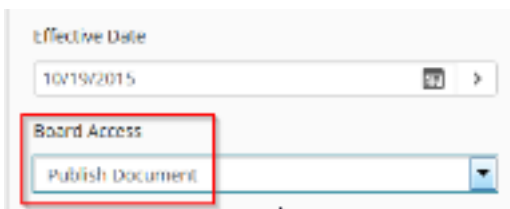
2. Select file by clicking on the box to the left of the file name



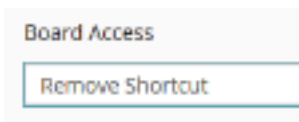
3. Under Fields in left column, select template - **Executive Documents**
4. Select Document Category – **Board**
5. Select Document Sub-Category based on selected document



6. Fill in Effective Date = **Date of Board Meeting**
 - a. **Date must be filled in or the workflow won't work**
 - b. 32-day window to allow for change in meeting date
7. Under Board Access – **Publish Document**
 - a. **If nothing is select, it will not appear on the Board website**



- b. If the wrong document is select, Board Access – **Remove Shortcut**



8. When finished, select **Save**

Additional Notes

1. Multiple Document Import/Drag-n-Drop
 - a. Apply template only
 - b. Do NOT populate fields during Import
 - c. CHECK box at bottom to apply to all documents

Folder

Executive Board 2017-22

Template

Executive Documents

Tags

+Add more tags

▼ Show advanced

Apply these properties to all imported files

2. New Board Meeting - Automation
 - a. Add Agenda with newest meeting date first
 - i. Automation will move current documents into Past Board Meetings folder
 - b. After Agenda, can add Minutes with older dates
 - i. If Minutes are added first, Automation will not work
3. Adding Documents or Folders that do NOT move with each new board meeting
 - a. Apply the Executive Documents template to the Folder or the Document
 - i. Fill out the below fields:
 1. Document Category = Board
 2. Document Sub-Category = Other
 3. Board Access = Publish Document

Template

Executive Documents

Document Category

Board

Document Sub-Category

Other

Document Name

Effective Date

Board Access

Publish Document

b. Workflow is set to ignore any document or folder with the Document Sub-Category of 'Other'

Online URL: <https://itskb.heifer.org/article.php?id=398>