Automate
Laserfiche Workflow 9™

Laserfiche Workflow™ is a flexible, easy-to-use tool for automating and optimizing business processes organization-wide. A fully integrated component of both Laserfiche Rio™ and Laserfiche Avante™, Laserfiche Workflow enables you to map, model and manage your business processes to efficiently achieve your goals. With its ability to integrate with a wide variety of enterprise applications, Laserfiche Workflow can be used to run repeatable processes in a consistent manner across the organization, optimizing resource efficiency, cost and service delivery.

Laserfiche Workflow at a Glance

- Create workflows with an intuitive, graphical design tool that provides a top-down process map, a toolbox of built-in activities and wizard-driven configuration.

- New business process functionality in Laserfiche Workflow allows you to:

  - Start workflows on a document from the Laserfiche Client or Laserfiche Web Access.

  - Report on customizable steps in that workflow's progress.

  - Alert and direct users regarding their responsibilities for completing business process tasks.

  - Improve visibility with Laserfiche Workflow instance details that provide information—including new charts, statistics and data—about specific times a workflow ran.

- More than 75 built-in activities simplify third-party integration, offer easy customization and enhance administrative control.

- Design custom actions with an embedded script editor supporting C# or VB.NET.

- Troubleshoot, optimize and report on system processes with an included search and reporting interface.

Simplify Complex Processes

Laserfiche Workflow enables you to translate even the most complex processes into a series of precise steps, each involving the users and activities you specify. You can start workflows in a variety of ways and configure the system to perform a number of activities on a document as part of the workflow process, from moving it to a new location to changing its security access to applying updated metadata from a third-party database.

- **Extend business process management to the point of capture:** Our innovative Capture Workflow approach enables you to design a capture strategy that is more efficient, requires less oversight and makes information immediately accessible and auditable, regardless of where it is in the capture process.

- **Simplify enterprise integration:** Support enterprise-level integration strategies by automating the process of retrieving and updating information from third-party databases.

- **Enable easy interaction with Laserfiche documents, folders and forms:** Laserfiche action activities, routing activities and Laserfiche Forms activities enable users to populate fields, retrieve content from Laserfiche Forms, change metadata, route information and more.

- **Integrate existing PDF forms with Workflow:** PDF form activities allow you to automatically import PDF forms into Laserfiche, retrieve information from PDF fields and map them to Laserfiche fields, adding immediate value to the product suite.

- **Easily share data:** The Replicate Entries activity automatically copies Laserfiche entries from one repository to another using Laserfiche briefcases.

- **Apply digital signatures:** Digital signature activities enable you to apply trustworthy digital signatures to a document, as well as delete and retrieve information about them.

Quickly Design Standard, Repeatable Processes

The Workflow Designer is an easy-to-use, graphical interface in which you build a workflow and define the conditions that must be met in order for a document to move from one step to the next. The Designer's streamlined layout helps you work quickly, while its intuitive "top-down" structure makes it easy to identify each step in the workflow. To minimize time spent troubleshooting design-related issues, you will be automatically alerted if a workflow is not configured correctly. Once you're satisfied with a workflow, you can activate it with the click of a button.

- A simple, intuitive and customizable interface lets you drag and drop activities onto a workflow and configure how they should perform.

- Start workflows on a schedule, when specified events take place in your Laserfiche repository, by submitting a Laserfiche Form or by manually clicking a button in Laserfiche Workflow, Laserfiche Web Access or the Laserfiche Client.

- Limit starting rules to specific events, users, repositories, folders, etc.

- Route documents based on conditions you define or different actions to be taken before or after a deadline.

- Perform two or more activities in parallel, based on specified conditions.

- Configure a workflow to wait to proceed until a specified condition becomes true.

- Extract data and customize its format with regular expressions.

- Create and run custom Laserfiche Workflow activities with VB.NET or C# scripts.

- Save workflows as XML-based files that you can easily load into other Laserfiche Workflow installations.

Increase Visibility into Business Processes

Laserfiche 9 includes a new feature called "business processes." Business processes are enhanced workflows that can be launched directly from the Laserfiche Client, Laserfiche Workflow or Laserfiche Web Access and offer increased monitoring and reporting. They also offer improved transparency by providing participants with customized instructions for the actions they need to take at any stage in the process. As the business process progresses, you can track who the business process is waiting on, and you can collect statistics on how long it takes for each participant to complete their tasks. Additionally, Laserfiche Workflow can automatically notify participants (based on their roles) of any pending or overdue work they need to complete for the business process to continue, as well as the resolution of completed steps.

- Define how the business process will appear, if at all, in Laserfiche client applications.

- Specify which users have rights to view and start the business process and what conditions must be met before those users will be allowed to start it in Laserfiche client applications.

- Define and report on an individual step in a business process.

- Update participants involved in a business process step activity while the step is running.

- Search for business processes by a variety of criteria and view information (such as step duration charts, resolution information, participant details, etc.) about a specific time a workflow ran.

Minimize IT Support

Laserfiche Workflow is just as easy to deploy and maintain as it is to use. Laserfiche Workflow's architecture helps you design a system that both fits your existing IT infrastructure and optimizes system performance. To promote greater visibility, Laserfiche Workflow includes reporting functionality so that you can quickly determine which workflows are running and where a particular item is located in a workflow. Reporting tools provide information about your workflows, including the average time it took them to run, in a table or chart.

The Workflow Administration Console supplies advanced performance options to ensure that Laserfiche Workflow takes full advantage of your system's resources and allows you to send e-mail notifications to users who have pending or overdue business process tasks. In this way, Laserfiche Workflow not only helps you automate business processes, but also makes them more transparent, giving you a single location from which to monitor your organization's operations.

A separate Windows service, known as the Workflow Subscriber, monitors the Laserfiche repository and notifies the Workflow Server when specified events occur. To make the best use of your current hardware, you have the option of installing the Workflow Server and Workflow Subscriber on either the same or different machines.

Your Next Step

Please visit **laserfiche.com/wf** or
e-mail **info@laserfiche.com** for more information.