

## Laserfiche Workflow

An organization's success is closely related to the efficiency of its everyday business processes. Yet too many organizations continue to rely on outdated, manual processes that hamper productivity and interfere with effective decision making. In today's increasingly-complex global environment, it's more important than ever for organizations to streamline operations and to help staff focus more of their time on revenue-generating activities.

Laserfiche Workflow™ is a flexible, easy-to-use tool for automating and optimizing business processes organization-wide. A central component of the Laserfiche product suite, Workflow enables you to map, model and manage your business processes to efficiently achieve your goals.

“I literally went to one Workflow session at the Conference, came back and started designing workflows. Within six months, we had 22 workflows. We did all the training in-house without a consultant, so we were able to implement our contract management system without any outside services or additional costs.”

Lance Dutcher, Systems Engineer  
Corporate Commission of the Mille Lacs Band of Ojibwe Indians

With its ability to integrate with a wide variety of enterprise applications, Workflow can be used to execute repeatable processes in a consistent manner across the organization, optimizing resource efficiency, cost and service delivery.

### Highlights:

- Simplify Complex Tasks.
- Design Workflow Rules with Ease.
- Minimize IT Support.

### Simple Workflow: Requesting Vacation Time

1. **Employee** submits a request using the Laserfiche Client.
2. **Manager** is notified for initial review via an automatic e-mail notification.
3. **Human Resources** gets an automatic

DENIED  
APPROVED

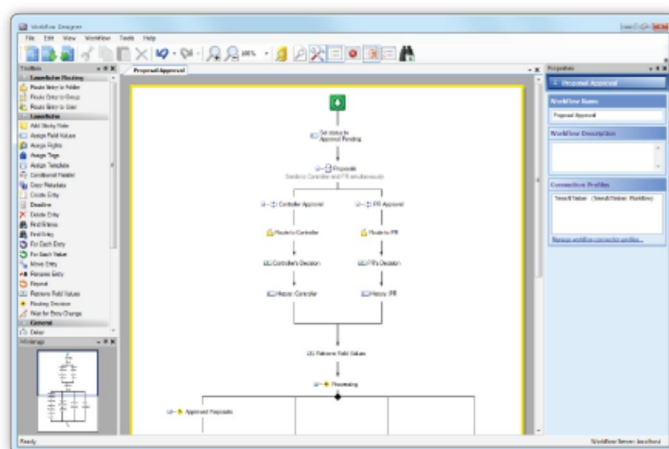
e-mail notification. The request is given final approval if the employee has vacation time available.

4. **Employee** is automatically notified if the request was approved or denied.

## Design Workflow Rules with Ease

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 and intelligent design help you work quickly, while its intuitive "top-down" structure makes it easy to identify each step in the workflow. To minimize time spent troubleshooting build-related issues, the Designer automatically alerts you when 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.
- Trigger workflows on a schedule or when specified events take place in your Laserfiche repository.
- Define exactly which events, documents, and users will start a workflow using flexible conditions.
- 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.
- Export workflows (with their starting rules and attachments) and import them into other Laserfiche Workflow 8.3 installations.



## Sample Tasks

Workflows perform specified actions at appropriate times. For example, using Laserfiche Workflow, you can automatically:

- Route a document to a specific user.
- Populate a field.
- Add a tag.
- Send an e-mail.
- Exchange information with other applications.

## Realize a Rapid Return on Investment

“After digitizing and automating our credentialing process with Laserfiche, we decreased processing time by 18 days and reduced costs by \$72 per file.”

Ryan Boe / Corporate Credentialing Manager / Molina Healthcare

## Minimize IT Support

Workflow is just as easy to deploy and maintain as it is to use. Workflow’s flexible architecture helps you automate your business processes in a way that both fits your existing IT infrastructure and helps you optimize system performance.

To promote greater visibility, Laserfiche Workflow includes detailed reporting functionality so that you can quickly determine which workflows are running and where a particular item is located in a workflow. New reporting provides detailed information about your workflows, including the average time it took them to run—in a table or a chart.

No matter how complex your business processes may be, you can manage them from a single location—the Workflow Administration Console. The Workflow Administration Console enables you to monitor and interact with your workflows and provides advanced performance options to ensure that Workflow takes full advantage of your system’s resources.

In this way, Workflow not only helps you automate business processes, but also makes them more transparent, providing you with a singular location from which to monitor and refine your organization’s operations.

Also, a separate Windows service, known as the Workflow Subscriber, monitors your Laserfiche repositories 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. A new Configuration Manager enables you to configure the Workflow Server, Subscriber, Monitored Repositories, E-mail Servers and Trustee directories, all from one convenient location.

“Post-implementation surveys show that, with Laserfiche, Gaston County is saving over 28,500 man-hours—the equivalent of 14 full-time employees—a year.”

Brandon Jackson / CIO / Gaston County, North Carolina

## Workflow in Action

Gaston County, NC, is the second largest county, by population, in the Charlotte Metropolitan Area.

Laserfiche Workflow facilitates case management within the social services department.

## Functionality

### Designing and Implementing Workflows

- 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.
- More than 60 built-in activities simplify third-party integration, offer easy customization and enhance administrative control.
- 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.

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

## Activities Overview

- Routing activities and Laserfiche action activities enable easy interaction with Laserfiche documents and folders—including populating fields, changing metadata, routing, e-mail notification and more.
- Enterprise integration activities enable you to update and insert information in—and query data from—third-party databases.
- Data replication activities simplify information sharing by automatically transferring documents from one repository to another.
- PDF activities allow you to retrieve values from a PDF form and store those values as tokens, assign values to a PDF form's fields and verify PDF signatures.
- [Digital Signature](#) activities enable you to easily apply trustworthy digital signatures to a document, as well as delete and retrieve information about them.
- Use activities written for Windows Workflow Foundation to extend Workflow functionality to all line-of-business applications.

## Workflow Operations

- Import and export workflows from one location to another.
- View detailed information about the performance of workflows, such as current status, errors or warnings, names of documents they interacted with and when completed.
- Manually terminate workflows as they run.

## User and Group Properties and Security

- Assign users custom properties for Laserfiche Workflow routing and decision-making.
- Define security that controls the actions a user can perform in the Workflow Designer, such as the ability to view a specific workflow but not modify it.

## Workflow Architecture

### Components

- Laserfiche Workflow Server: Executes workflow rules. When a starting rule is satisfied, the Workflow Server runs the activities you configured in the corresponding workflow.
- Workflow Administration Console: Used to configure Workflow, monitor Workflow activity and set up security.
- Laserfiche Workflow Subscriber: Receives notification from a Laserfiche Server when a change is made to a Laserfiche entry and evaluates the event to determine if a starting rule is satisfied. If so, it notifies the Workflow Server.
- Laserfiche Workflow Designer: Used to design and publish

workflows and starting rules.

## Environment

### Operating Systems

- Windows XP Professional (Service Pack 3), Windows 2003 (Service Pack 2), Windows Vista (Service Pack 1), Windows 2008 Server, Windows 2008 Server R2, Windows 7. 32-bit and 64-bit versions supported for all Workflow components.

### DBMS

- SQL Server 2005 (Service Pack 1 or higher), SQL Server Express 2005, SQL Server 2008, SQL Server 2008 R2, SQL Server 2008 Express, Oracle 10g (10.2.0.4+), Oracle 11g (11.1.0.7+), Oracle 11g R2 (11.2.0.1+).

### Required Windows Components

- Windows Message Queuing component.
- Microsoft .NET Framework 4.0.

### Protocols

- Built on Microsoft Windows Workflow Foundation.

## Additional Resources

### Data Sheets



#### [Laserfiche Workflow 9](#)

Automate and optimize business processes enterprise-wide

### Case Studies



#### [RMS Manufacturing](#)

RMS puts Laserfiche into action on the machine shop floor



#### [Physicians Professional Services](#)

Laserfiche Workflow helps Physicians Professional Services increase productivity by 20%



[D.L. Evans](#)

D.L. Evans celebrates ten years of savings and streamlined processes with Laserfiche

---

**Run Smarter<sup>®</sup>**

© 2013 Laserfiche  
[Privacy](#) | [Trademark](#)

---