

Laserfiche® and SharePoint® Integration



Your potential, realized.

With the Laserfiche and SharePoint Integration components included with Laserfiche Web Access, Laserfiche's industry-leading document imaging and records management solutions can be easily accessed from Microsoft® SharePoint®.

List any part of your Laserfiche repository on a SharePoint page. Scan directly to a Laserfiche folder, right from your SharePoint site. Retrieve Laserfiche documents or folders using the SharePoint search box.

Even when you're working from a SharePoint site, your valuable Laserfiche repository content is right in front of you.

Learn More Inside

- ▶ Include imaged documents in collaborative processes.
- ▶ Simplify record storage with pre-configured routing rules.
- ▶ Easily locate documents archived in Laserfiche.
- ▶ Create tasks in SharePoint based on actions taken in a Laserfiche repository.

Expand Laserfiche Access—Easily

The Laserfiche and SharePoint Integration (LfSPI) is built on the power of Laserfiche Web Access, a rich, full-featured thin client with minimal installation, support and maintenance requirements.

Each component of the Laserfiche and SharePoint Integration comes with its own installation program and configuration tool, so working with the LfSPI is simple for IT administrators.

Access Laserfiche from SharePoint

- ▶ Provide Laserfiche's document imaging and archival capabilities from SharePoint sites.
- ▶ Browse the Laserfiche repository through SharePoint, with full Laserfiche security enforcement.
- ▶ Scan, process and open documents stored in Laserfiche directly from your SharePoint site.
- ▶ View document images in Laserfiche Web Access with efficient page-by-page access. Open the Laserfiche scanning interface from within SharePoint.
- ▶ Apply annotations to your imaged documents or export them as PDFs from Web Access.
- ▶ Directly open Microsoft Office® documents stored in Laserfiche from SharePoint.
- ▶ Find Laserfiche content from the SharePoint search box, including the text surrounding matching words.

There are four components to the LfSPI:

- ▶ Laserfiche Web Part for SharePoint
- ▶ Laserfiche Records Center Service
- ▶ SharePoint Search Handler for Laserfiche
- ▶ Laserfiche Workflow Activities for SharePoint



Laserfiche Web Part for SharePoint

The Laserfiche Web Part for SharePoint brings Laserfiche document imaging functionality to SharePoint sites. Simply add Laserfiche repository access to any SharePoint site by choosing it from the list of Web Parts. Once you've added this component to the SharePoint server farm, you can add it to any SharePoint page, just like any other Web Part.

The component has a number of configurable parameters, enabling customized functionality to fit your specific needs. Besides providing the ability to manage imaged documents from your SharePoint site, you also benefit from Laserfiche document scanning, uploading and viewing. Users view scanned documents in the easy-to-use Laserfiche Web Access document viewer.



▲ Documents scanned into Laserfiche are also accessible through SharePoint with the Laserfiche Web Part.

Human Resources [All Sites]

Home | Document Center | Human Resources | Laserfiche Search | News | Reports | Search | Sites

View All Site Content

- Documents
 - Employment Applications
- Lists
- Discussions
- Sites
- People and Groups
 - Recycle Bin

Human Resources

HR Page for processing employment applications

HR Onboarding Tasks

Description	Title	Status	Priority	Due Date	Link	Created
Please schedule Interview with Smith, Jane	Schedule Interview ! NEW	Not Started	(2) Normal			9/9/2008 11:12 AM
Please schedule Interview with Smith, Joe	Schedule Interview ! NEW	Not Started	(2) Normal			9/9/2008 11:12 AM

[Add new item](#)

Employment Applications

Type	Name	Modified	Applicant Name
	Resume Jane Doe ! NEW	9/9/2008 10:31 AM	Doe, Jane
	John Doe Application ! NEW	9/9/2008 10:39 AM	Doe, John
	Smith_Jane_Resume_Cover_Leter.doc ! NEW	9/9/2008 10:58 AM	Smith, Jane
	Smith, Joe - Application.doc ! NEW	9/9/2008 10:59 AM	Smith, Joe
	JJones_Resume ! NEW	9/9/2008 10:46 AM	Jones, Joe
	Jane Jones CV ! NEW	9/9/2008 10:47 AM	Jones, Jane

[Add new document](#)

Laserfiche Repository Access

GeneralDemo8\Commercial\Prospective Employees\Contact For Interview

Name	Creatio...	Last M...	Pages	Templ...
Smith, Jane	9/9/200...	9/9/200...		
Smith, Joe	9/9/200...	9/9/200...		

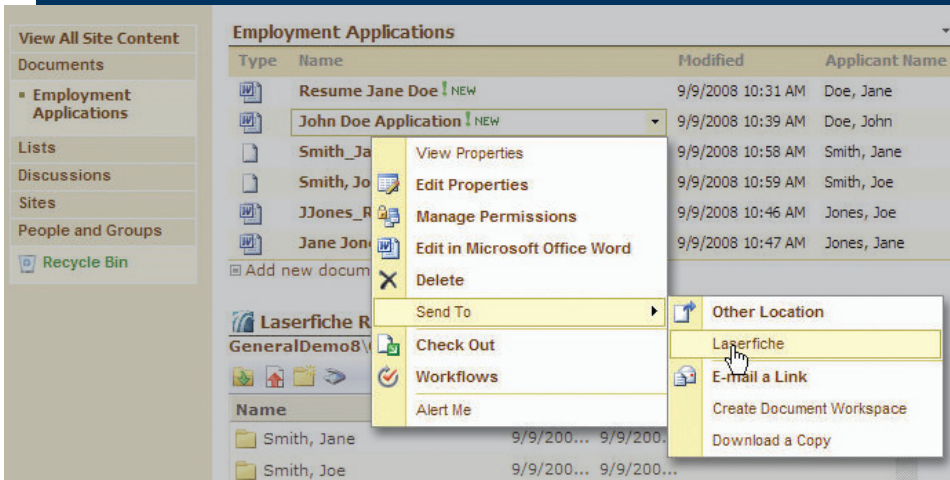
If your organization is hiring a new employee, it's extremely likely that some of the documents they need to work with are paper—but SharePoint does not offer a simple way to handle scanned paper.

With the LfSPI, however, integrating scanned paper documents into your collaborative processes is simple. On the project portal, add the Laserfiche Web Part and point it to a folder in Laserfiche. Launch Laserfiche Scanning directly from a button in the Laserfiche Web Part interface and upload your newly scanned document. It's now safely stored in Laserfiche and available to your team right on your SharePoint site.

◀ The Laserfiche Web Part within the SharePoint interface.



Laserfiche Records Center Service



Another cornerstone of the LfSPI is the ability to store SharePoint documents in Laserfiche once the collaboration phase is finished. With the Laserfiche Records Center Service, documents are archived and managed in Laserfiche, so you manage the complete life cycle of your documents—transparently.

From any document library in SharePoint, a user can bring up the document's context menu and have it sent directly to Laserfiche. Administrators can configure the integration to automatically pull metadata from the content library into the document's template when it's sent to Laserfiche, without user intervention. Documents are automatically named and filed in Laserfiche based on this metadata. Filing documents without automatic routing rules will prompt users to choose the correct filing, subject to their security restrictions.

To keep the system from generating a copy of a document when it's sent to Laserfiche, users can replace the document in SharePoint with a

URL that points to the document's location in Laserfiche, preserving easy access to the document. Administrators can also choose to keep copies of the documents in both systems or delete the document from SharePoint entirely. Because Laserfiche is thoroughly integrated with Windows Active Directory, you maintain document security at every step in the process.

If you're storing your documents in SharePoint, you'll reach its 100 GB storage limit quickly. With the LfSPI, you simply move documents into Laserfiche once their collaboration phase is finished, so you keep the size of your SharePoint site within limits.

SharePoint Search Handler for Laserfiche

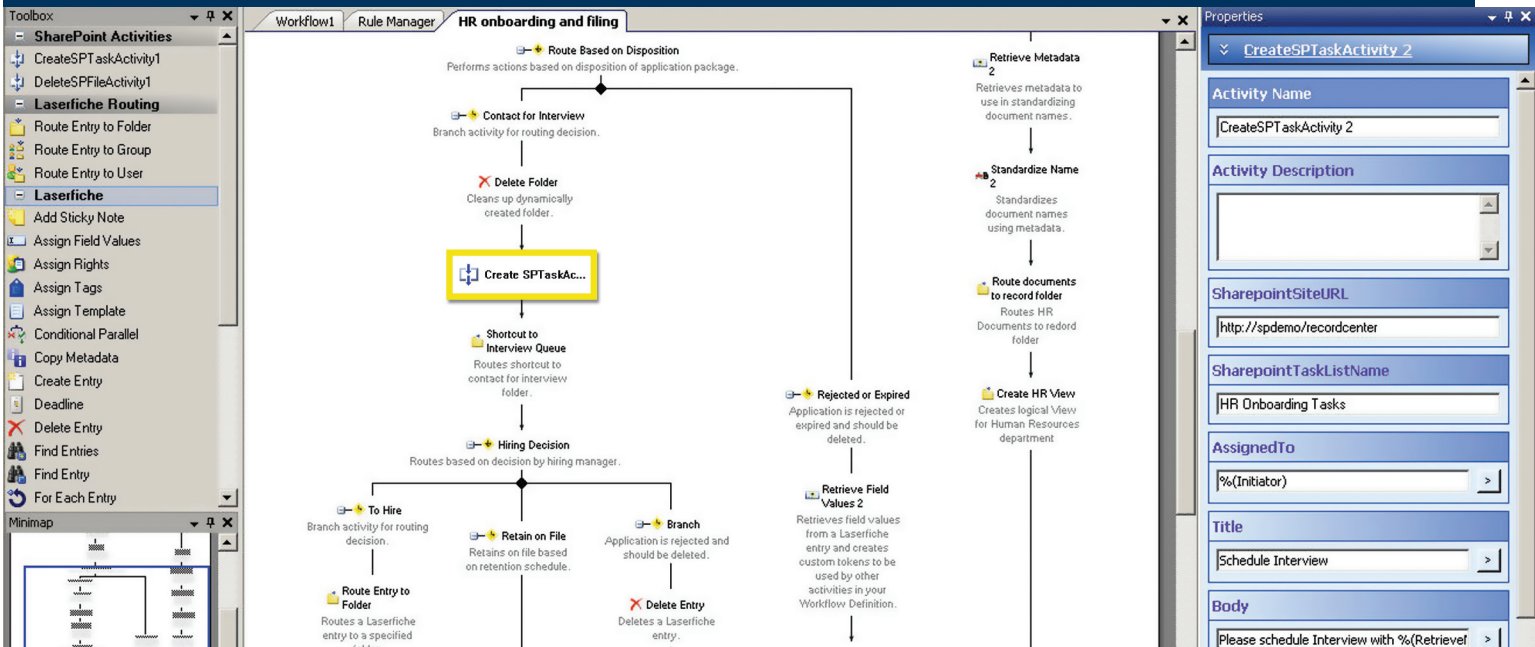
To create search integration between Laserfiche and SharePoint, the SharePoint Search Handler for Laserfiche is provided with the LfSPI. It allows a SharePoint search to retrieve both Laserfiche and SharePoint content at the same time, or to just search Laserfiche, from the SharePoint search box.

The integrated search capabilities provided by Laserfiche are especially useful if your organization creates large volumes of content through SharePoint, as it uses Laserfiche's ability to efficiently store very large content collections. While the Laserfiche Records Center Service allows you to minimize the

content stored in SharePoint and move that content into a centralized Laserfiche repository, search integration enables users to search across all that content—even while working from a SharePoint page.

With this integrated search functionality, users can search through the full text of documents, template fields or Laserfiche folders to find just the documents they need. Search results are displayed with lines of context and highlighted search terms—so users don't have to open up multiple documents to find the information they're looking for.

Laserfiche Workflow Activities for SharePoint

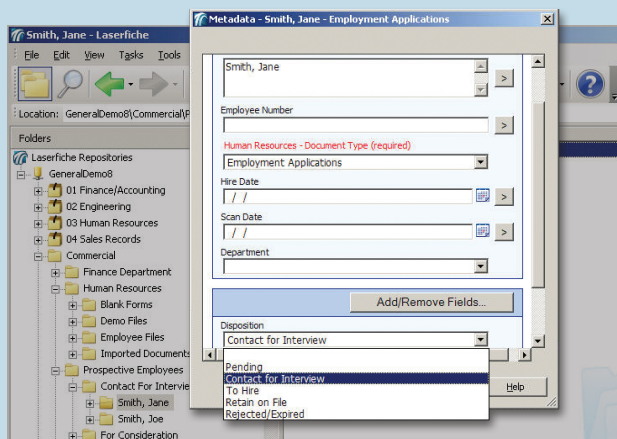


- ▲ The Laserfiche Workflow interface includes (left to right): a toolbox containing all your workflow activities, a canvas for workflow design and a task pane for activity configuration.

Laserfiche Workflow offers an intuitive, graphical interface for testing, modifying and supporting workflow activities. Built on the Windows Workflow Foundation, Laserfiche Workflow offers the capability to adapt your workflow rules to almost any situation. Using Workflow's built-in script editor, you can even write custom scripts in C# or VB.NET.

In the Workflow Task Pane, you can assign properties to any activity. In the example above, the task is automatically assigned to **%(Initiator)**, the person initiating the workflow from SharePoint. Laserfiche can also set important properties like due date or priority, so the task that shows up in SharePoint is complete and contains relevant task information.

Suppose that a prospective employee's application has been sent to Laserfiche from SharePoint (below). Once the application has been reviewed and the applicant is ready to be contacted for an interview, the template field "Contact for Interview" is selected. Laserfiche Workflow detects this and automatically generates a task in SharePoint.



HR Onboarding Tasks

Description	Title	Status	Priority
Please schedule Interview with Smith, Jane	Schedule Interview NEW	Not Started	(2) Normal
Please schedule Interview with Smith, Joe	Schedule Interview NEW	Not Started	(2) Normal

☐ Add new item

Here is the newly created task in SharePoint (above), with a link to the document's location in Laserfiche. With this uniform interface, users can always access documents, regardless of whether they're located in Laserfiche or SharePoint.

About Laserfiche

Laserfiche Product Suite

Laserfiche Enterprise Content Management Implement a scalable and flexible ECM solution.

Laserfiche Rio™

Laserfiche Document Management Organize, protect and retrieve information.

Laserfiche Avante™

Laserfiche Team™

Laserfiche United™

Laserfiche Records Management Guarantee document integrity with DoD 5015.2-certified transparent records management.

Laserfiche Records Management Edition™

Document and Information Capture Bring paper and electronic documents into Laserfiche.

Laserfiche Quick Fields™

Laserfiche Import Agent™

Laserfiche Snapshot™

Business Process Management Streamline document-centered processes and track activity for regulatory compliance.

Laserfiche Workflow Suite™

Laserfiche Agenda Manager™

Laserfiche Agenda Processor™

Laserfiche Audit Trail™

Document Access and Distribution Provide secure, document access to users.

Laserfiche Web Access™

Laserfiche WebLink™

Laserfiche Plus™

Laserfiche E-Mail Plug-In™

Integration and Customization Integrate Laserfiche with third-party applications and customize system functionality.

Laserfiche Toolkit™

Laserfiche Marketplace™

Laserfiche Code Library™

Support Manage change and protect your investment.

Laserfiche Software Assurance Plan (LSAP™)

Laserfiche Solutions

Laserfiche® creates simple and elegant document and content management solutions that help organizations run smarter. Since 1987, more than 25,000 organizations worldwide have used Laserfiche software to streamline processes for managing documents, records and workflow. By digitizing paper archives, Laserfiche enables users to instantly pinpoint the information they need, collaborate more effectively and complete daily tasks more efficiently. Secure Web access allows organizations to share information with remote offices, business partners and customers, while user- and role-based security options ensure compliance with government- and industry-mandated standards, including Department of Defense (DoD) standard 5015.2.

Laserfiche has a strong presence in the financial services and healthcare industries, and is the acknowledged leader in the municipal government market. Federal clients include all branches of the United States military, the Secret Service and the State Department.

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Your Next Step

Call (800) 985-8533 to arrange a demonstration.
Also e-mail info@laserfiche.com or visit
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