

# Workflow 8™

## Configurable Business Process Management

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. 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.

### 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.
- More than 60 built-in activities simplify third-party integration, offer easy customization and enhance administrative control.
  - **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.
- Design custom routing rules with an embedded editor supporting C# or VB.NET scripting.
- Troubleshoot, optimize and report on system processes with an included search and reporting interface.
- Use included ADO.NET data objects to process analytics by preferred reporting tools.
- Use activities written for Windows Workflow Foundation to extend Workflow functionality to all line-of-business applications.

### Quickly Design Standardized, Repeatable Business 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 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 should trigger a workflow using flexible conditions.
- 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 Workflow installations.

## Simplify Complex Processes

Workflow enables you to translate even the most complex processes into a series of precise steps, each involving the users and activities you specify. Nearly any event in Laserfiche can trigger a workflow, and you can 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.
- **Integrate existing PDF forms with Workflow:** PDF 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.

## Minimize IT Support

Workflow is just as easy to deploy and maintain as it is to use. Workflow's flexible architecture helps you design a system 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 statistic 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 single location from which to monitor and refine your organization's operations.

Also, 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. 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.

## About Laserfiche

Since 1987, Laserfiche® has used its Run Smarter® philosophy to create simple and elegant enterprise content management (ECM) solutions. More than 30,000 organizations worldwide—including federal, state and local government agencies—use Laserfiche software to streamline document, records and business process management.

## Your Next Step

Please call **(800) 985-8533** or e-mail [info@laserfiche.com](mailto:info@laserfiche.com) for more information.

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