Course Descriptions

This list contains descriptions for the classes being offered at our 2020 Empower Conference.

Please note that this class list is not complete—we will continue adding more classes throughout the year.

Track: Network

Make connections, share tips and tricks and socialize with like-minded innovators by attending these sessions and events. You can gather new ideas for how to get the most out of your Laserfiche solution by joining industry- and region-specific user groups, or relax and refuel at General Lunches and the Special Event.

General Lunch & Networking (Tuesday, Wednesday & Thursday)
Laserfiche is making it even easier to form meaningful connections during your time at Empower! During conference lunches, tables will be marked with colored table cloths to designate areas where you can meet other attendees with similar job roles in order to share your experiences and advice. Lunch is open to all attendees.

Empower Special Event
While we spend our days at Empower busy learning, we like to let loose at night – and this year, we're transforming the Convention Center into Club Empower! Pack your dancing shoes and get ready to bust a move with Naughty by Nature, the Sugarhill Gang and a popular Vegas DJ. Afraid you lost your ability to Vogue and do the Running Man? Don’t worry – we’ll have dance instructors to get you in the groove! Join us for delicious food and drinks, fun with friends new and old, and some fly music as we celebrate the magic of Empower. It will be all that and a bag of chips!

User Group Leader Lunch Roundtable
If you’re interested in starting your own user group or learning best practices on how to grow your existing group, join this roundtable discussion with other group leaders. Whether you’re looking to create or manage a regional, industry-focused or internal Laserfiche user group, you’ll gain ideas that will help you forge a strong network!

User Group: Human Resources Professionals
Come meet other attendees who use Laserfiche within their Human Resources Department to exchange best practices with colleagues and learn more about how others are utilizing Laserfiche.

User Group: Finance Professionals
Come meet other attendees who use Laserfiche within their Finance Departments to exchange best practices and learn more about how others are utilizing Laserfiche.

User Group: Records Managers
Come meet other attendees who use Laserfiche for Records Management to exchange best practices with colleagues and learn more about how others are utilizing Laserfiche.
User Group: New Users
Come meet other new Laserfiche users to hear about their experiences and share what you’ve learned at Empower.

User Group: Tribal Nations
Come meet other Laserfiche users from Tribal Nations to exchange best practices with colleagues and learn more about how others are utilizing Laserfiche.

User Group: Manufacturing/Distribution and Healthcare
Come meet other Laserfiche users from various industries to exchange best practices with colleagues and learn more about how other users are utilizing Laserfiche. You are welcome to join this user group if you fall into one of these industries or are simply interested in hearing about how others are using Laserfiche.

Financial Services Networking (Leadership Symposium)
Enjoy afternoon refreshments and connect with industry peers to exchange Laserfiche solution ideas, and discuss industry trends and best practices. Laserfiche will also present the annual Industry Influencers award along with this valuable opportunity to connect with financial services Laserfiche users. All Empower attendees are welcome to join.

Education Networking (Leadership Symposium)
Enjoy afternoon refreshments and connect with industry peers to exchange Laserfiche solution ideas, and discuss industry trends and best practices. Laserfiche will also present the annual Industry Influencers award along with this valuable opportunity to connect with education Laserfiche users. All Empower attendees are welcome to join.
**Track: Leadership**

*Go beyond and make a difference with business and leadership strategies presented by top industry experts. From enhancing your business acumen to staying on the cutting edge of technology trends, these classes cover a dynamic range of subjects that represent the leading concerns of modern professionals. Gain keen insight on department-specific and enterprise-level strategies and everything in between.*

**Using Design Thinking to Develop Better Solutions**
Instructor: Karen Schneider, Director of User Experience Design, Laserfiche

More than just the latest trend among start-ups, design thinking is a process that can have a real impact on your organization’s effectiveness and bottom line by fostering empathy with your target audience. It enhances your ability to design products and services that meet user expectations and also keep up with technological advances. Come join us for an engaging workshop that will give you the basic tools for getting started with this process.

We’ll highlight how you can utilize design thinking to:
- Focus on your customers’ needs.
- Define the problems you need to solve.
- Share your ideations with your end users to test the validity of your solutions.

**Essential Presentation Skills for Anyone Who has to Present, Ever!**
Instructor: Kerri Garbis, President, Ovation Communication

What’s so scary about standing up in front of people and talking? For some, pretty much everything! In this session, you will learn presentation skills, techniques and strategies from actor, author, and Empower favorite, Kerri Garbis of Ovation. You will learn how to present with poise and engage your audience in a positive and memorable manner. You’ll also garner the professional’s go-to techniques for conquering stage fright, as well as be introduced to easily applicable presentation structures. This session is highly interactive, giving you opportunities to implement these techniques and try out some new skills.

**Leadership Presence: Making the Elusive Tangible**
Instructor: Kerri Garbis, President, Ovation Communication

Leadership presence -- the blended skills of commanding a room, adapting to different audiences, and carrying yourself with poise, while positively communicating (both verbally and non-verbally) with confidence. It is often an elusive state, though one we need to embody in order to be effective leaders and professionals. This highly interactive session, led by Empower favorite, Kerri Garbis of Ovation, will provide participants with opportunities to try some new skills on their feet that can help improve their overall presence, and participants will participate in a lively discussion exploring today’s challenges for professionals.
Cyber Security to Support Digital Transformation Goals
Instructor: Sandy Silk; Director, Information Security Education & Consulting; Harvard University
Consumers are demanding we offer outstanding user experiences and technology interfaces, and we need to strategize how we both safeguard and leverage ever-growing portfolios of data and systems to differentiate ourselves from our competitors. Yet, often our cyber security programs and business goals seem to be at odds.
How do we revise our cyber security mindsets to support digital transformation initiatives? Join this session to learn how you can:
- Embed security into your culture, technologies and processes.
- Empower innovation and expedite time-to-market through consistent security risk governance.
- Assess the impacts, goals and methods of likely cyber attacks and incidents.
- Align IT and security professionals with business objectives and risk tolerance.
- Prepare now for effective detection and response to reduce business impacts of incidents.

From Surviving to Thriving as an “Only” in Technology Leadership
Instructor: Sandy Silk; Director, Information Security Education & Consulting; Harvard University
Becoming a leader involves much more than being put in a leadership role, acquiring new skills and adapting one’s style. It involves a fundamental identity shift. Integrating leadership into one’s core identity can be particularly challenging for those who are the first or “only” of a particular demographic on their team. For example, women and people of color in predominantly male or white work environments may not only feel like imposters, but their perceptions may be amplified by unconscious bias in society and the workplace, regardless of how self-assured, smart and confident they are.
This workshop empowers attendees to emerge as confident leaders by promoting awareness of self-deprecating habits and nurturing an authentic leadership identity that aligns with their personal values and advances the mission and goals of the organizations in which they lead.
By the end of this session, participants will be able to:
- Prioritize one self-limiting habit to modify gradually during the next month.
- Challenge negative self-talk using a list of rational questions to focus on evidence, competencies, and strengths.
- Tell someone about their achievements and skills in a manner that reflects their personal values.
Start Less, Finish More: The Real Cost of Organizational Multitasking
Instructor: Brandi Olson, CEO, The Olson Group

The research is compelling—our brains work best when focused on one task at a time. Switching between tasks results in a host of negative consequences, including dramatic loss of productivity, lower quality work and increased burnout. At the agile team level, scrum masters, product owners, and coaches teach the principles of prioritization, focus, and getting to done.

But what happens when multitasking is built into the culture of an organization? Organizational multitasking shows up in the form of competing priorities, high numbers of projects in progress, spreading people too thin and employee turnover.

This workshop is focused on how to shift the mindset and culture that leads to organizational multitasking. Participants will walk away with tools to influence change from a portfolio management culture of getting more started to a culture of getting more of the right things done. In this session, you will:

- See the science that supports the case for more focus and less multitasking at the highest level of the organization.
- Practice creating simple illustrations to explain the cost of multitasking for individuals and organizations.
- Play games! Also, develop skills to lead similar exercises with a leadership team, managers, and team members to shift the organizational mindset that perpetuates multitasking.

Improve Your Likability ➔ Improve Your Impact
Instructor: Bill Graham, Speaker and Communications Trainer, Graham Corporate Communications

Likability is not trying to get people to like you; likability is about being the most genuine, personable, and helpful person you can be because people want to work with the people they like best. This session will provide strategies to help leaders at all levels of the organization to build personal connections that will help open doors to greater opportunities.

Make Your Message Repeatable
Instructor: Bill Graham, Speaker and Communications Trainer, Graham Corporate Communications

Communication is not speaking. Speaking is an activity, and communication is the desired result. If they remember your message, they may buy into your proposal or support your new initiative. If they repeat what you say, they are advocating for you. Great messages are not just remembered; they are repeated. Join this session for a walk-through of the six elements that encourage people to repeat your messages.
Getting to Yes: A 7-Step Process to Get Buy-In on Every Project
Instructor: Denyse Drummond-Dunn, President & Chief Analyst, C3Centricity
Although there is no magic bullet to transform your business into a powerhouse, there are many similarities amongst those that grow more profitably, and what they have in common is their business project process. This talk will share a 7-step roadmap to succeeding with every project, whatever the size of your organization. Using case studies from the CPG industry and elsewhere, we will walk through the steps of project management that concentrate on getting the results and outcome desired. Both good and bad examples are shared, so that the importance of each step is highlighted, and the actions involved clearly understood. At the end of the talk, attendees will be able to review their own projects and incorporate the missing steps they have learned. These practically guarantees that your next project not only gets management buy-in, but future projects will be more quickly and easily completed.

Harmony Through Teamwork! Five Tips for Improved Communication in the Workplace
Instructor: Jan Spence, CEO, Jan Spence & Associates
For the first time ever, there are five different generations in the workforce. Each generation has their own style of communicating and varying expectations for workplace interactions. Regardless of industry, location, or company size, ineffective communications can obstruct information, hinder collaboration, and negatively impact employee satisfaction. In this highly interactive, high-energy keynote, Jan Spence will use her vast knowledge helping companies and individuals take their teamwork, listening, and communication skills to the next level by sharing tips on how to set established protocols and clear processes of communication, thus increasing employee engagement and overall productivity. By the end of the session, participants will have the necessary tools they can implement immediately to successfully navigate the varying and unique needs of a multi-generational workforce.

Three Keys to Effective Leadership in Changing Times
Instructor: Jan Spence, CEO, Jan Spence & Associates
Today, it seems the only constant at work is change and this change can sometimes happen in the blink of an eye. When it comes to adjustments both large (having 5 generations in the workplace for the first time) and small (learning to use a new copier), how well those in a leadership role manage these changes can cause a business to either flourish or flounder. In this highly interactive, high-energy keynote, Jan Spence uses her vast experience as a business owner to help leaders learn how to keep the workplace running effectively by helping employees cope with various changes. Attendees will gain actionable, innovative tools they can use to open up lines of communication with their teams, foster collaboration and teamwork, and create connections, all of which will lead to a greater sense of trust among the workforce, even when the unexpected occurs. They will also learn ways to share the techniques they learn with those they manage for even greater synergy.
Project Management Fundamentals: Keys to Successful Implementation
Instructor: Alexis Allen, Technical Product Manager, Laserfiche
This class is for anyone interested in how to take key concepts from project management methodologies and apply them to software implementations in order to enhance project outcomes. Whether you’re new to project management or familiar with the fundamentals, this class will highlight some of the best strategies from the PMBOK (Project Management Body of Knowledge) Guide to help keep your projects within scope, on time and in budget.

Change Driver or Midwife? Strategies for Effecting Sustainable Change
Instructor: Lorraine Aguilar, Chief Engagement Officer, Working Harmony
As a leader, how do you go beyond “flavor of the month” organizational trends to address what is truly needed? In a world where everyone is trying to sell you a solution, how do you decide what works for your unique needs and culture? In this interactive session, you will:
- Experience a new way of observing what’s going on in your organization — beginning with yourself.
- Examine pain points and underlying drivers behind what’s not working in your organization — and in your own life.
- Gain clarity on what kinds of solutions would make a meaningful difference.

Women with Impact: Overcoming Challenges and Getting Results
Instructors: Sarah Wefald, Senior Product Manager, Laserfiche | Duana Kindle, Managing Director of Human Resources, Frisco Independent School District | Haylee Glasscock, Laserfiche Administrator, Osceola County Sheriff’s Department Studies show that while organizations have made great strides in workplace equality and equity, women continue to grapple with obstacles when leading teams or initiatives, or trying to get to the next level of their careers. According to McKinsey, more women are becoming senior leaders, but for every 100 men promoted and hired to manager, only 72 women are promoted and hired. Hear a panel of women who have led successful initiatives at their organizations discuss what challenges they faced and how they overcame them, and how to lift up others in your organization who may need your support.

Beyond Traditional Roles: Integrating Technology, Leadership and Innovation
Instructors: Lea Eriksen, Director of Technology and Innovation/CIO, City of Long Beach | Tracy Colunga, Chief Innovation Officer, City of Long Beach
There’s more than one path to success. Hear from the City of Long Beach’s technology leaders — Director of Technology and Innovation and CIO Lea Eriksen and Chief Innovation Officer Tracy Colunga — who took nontraditional tracks to their current roles.
In this session, they will also discuss:
- Digital transformation and what it means for a city of over 450,000 residents.
- How the city uses technology to go beyond “keeping the lights on”, elevate the citizen experience and innovate citizen services.
- Leadership techniques for moving your initiative forward.
Building Your Personal Brand: Marketing Yourself to Build Relationships and Get Things Done
Instructor: Melissa Henley, Director of Customer Experience, Laserfiche
Branding isn’t just for companies — the way we portray ourselves in the world is our own personal brand. Women, especially, face unique challenges when it comes to personal branding — e.g., gender stereotypes or the “likability conundrum” — which can hinder efforts to influence others and get things done. How do you navigate this complex landscape and build a personal brand that will help you drive change?
In this session, you will learn:
• The importance of personal branding.
• Strategies for building a personal brand without sacrificing authenticity.
• How to use your personal brand to initiate and drive change—whether it’s getting buy-in for a technology initiative or transforming the way people work.

It’s a Process Building a Process: Strategies for Effective Communication During Implementation
Instructor: Sarah Lieber, ERP Systems Specialist, Cumberland County
The planning stage is the most critical part of any implementation, particularly when automating processes. Effective communication between end-users, subject matter experts, decision-makers, and technology implementers is key to designing and implementing a successful solution. Join this class to unlock ways to ensure success by:
• Understanding the importance of effective communication throughout the planning and design process.
• Learning new ways to improve communication and ensure thorough understanding of the process.
• Learning to coach others through change and encouraging their ideas, feedback and opinions.

From Measures to Meaning: Connecting Performance Measures to Organizational Strategy
Instructor: Rosalind Collins, Deputy Commissioner of the Revenue, City of Charlottesville
In the age of big data, one of the greatest challenges is determining what information is meaningful and what isn’t. You can spend hours analyzing metrics and still end up with little or no insight, but defining key performance measurements that align with your organization’s strategy can help further operational goals.
Join this enlightening session to learn:
• What makes a good measurement—just because you can measure it doesn’t make it meaningful.
• How to work backwards from your organization’s strategy to meaningful data.
• Different levels of measuring for different audiences.
• The benefits of different methods of performance reporting such as dashboards, spreadsheets and graphs.

Carpe Diem: How to Use Kanban Techniques to Get Things Done
Instructor: Tim Nolan, Applications Manager, Collin County
Do you have a “to do” list at work? Have you ever added something to your “to do” list just so you can scratch it off? Join this interactive workshop to learn several Agile techniques to manage your own personal workload, including how using a Kanban board can help you keep organized and stay on top of tasks. By the end of the session, you will have the necessary tools to get your work life in order and get stuff done.

What I Wish I had Known Before I Automated My Process
Instructors: Melissa Henley, Director of Customer Experience, Laserfiche | Dava Clark, Programmer Analyst, Cypress-Fairbanks ISD | Michelle Lombardo Smith, Laserfiche Business Analyst, The Wenger Group
Process automation and re-engineering is no easy task. Join a panel of automation experts to hear how you can avoid pitfalls and learn from their experience to ensure success from the start.
We will discuss:
• How to effectively design automated processes.
• Tips and tricks to help users complete processes correctly.
• Roll out strategies that increase user adoption.

Now What? How to Go Beyond in Balancing Diverse Perspectives in the Workplace
Instructor: Eveline Jaynes, Director of Recruiting, Laserfiche
People are the lifeblood of any organization! Creating a diverse & inclusive workplace fosters a culture where people can openly share their talent, skills and experiences with no hesitation. Even in a highly competitive recruiting market, companies still don’t take full advantage of the valuable impact diversity and inclusion brings to an organization. How do we make it a priority?
By the end of this session you will be able to go beyond the basics of diversity & inclusion by:
• Understanding how to avoid typical implementation pitfalls of diversity & inclusion initiatives.
• Minimizing common sacrifices companies subconsciously make when it comes to diversity & inclusion.
• Incorporating helpful techniques for making diversity & inclusion top of mind in your organization.

Financial Services Leadership Symposium
Instructors: Joel Bruckenstein, Founder, Technology Tools for Today (T3) | Tim Welsh; President; Nexus Strategy, LLC | Morgan Wheeler, Assistant Vice President, Farmers & Merchants Bank | Chad Christensen, Chief Compliance Officer, Semper Augustus Investment | Vibhaw Arya, Head of Operations & Information Technology, Shufro Rose
At the Financial Services Leadership Symposium, get inspired by leaders at the cutting edge of banking, insurance, wealth, fintech and lending who are driving digital transformation to elevate client services and achieve business growth. This daylong event features a jam-packed agenda with sessions designed to help you obtain perspectives on driving organizational growth with innovative technology. Featured speakers include internationally recognized expert on applied technology for financial professionals, Joel Bruckenstein; Head of Operations & Information Technology for Shufro Rose, Vibhaw K. Arya; and President and Founder of Nexus Strategy, Tim Welsh.
Education Leadership Symposium
Instructors: Dr. Jane Close Conoley; President; California State University, Long Beach | Helen Norris, Vice President and CIO, Chapman University; EDUCAUSE Board Member | Howard Miller, CIO, UCLA Anderson | Ed Evans, CIO, Texas A&M University-Corpus Christi | Tosha Pham; CIO and Associate Vice President of ITS; California State University, Los Angeles
At the Education Leadership Symposium, learn from leaders at the forefront of higher education and K-12 education who are driving innovation and impact with comprehensive services that enable student success. This daylong event features a jam-packed agenda with sessions designed to help you obtain perspectives on driving organizational growth with innovative technology.
Featured speakers include the President of California State University, Long Beach, the Head of Technology for the Los Angeles Clippers, and the CIO of California State University, Los Angeles.

Government Leadership Symposium
Instructors: Lea Eriksen; Director of Technology and Innovation/CIO; City of Long Beach, CA | Jim McDonnell; Sheriff (Ret’d); County of Los Angeles, CA | Phillip Leclair; CIO; City of Pasadena, CA | Joseph Cevetello; CIO; City of Santa Monica, CA | Kevin Gray; CIO; City of Burbank, CA
At the Government Leadership Symposium, discover the latest in civic innovation that is reshaping public sector service delivery for citizens, and obtain actionable insights for your organization’s digital transformation. This daylong event features a jam-packed agenda with sessions designed to help you obtain perspectives on driving organizational growth with innovative technology.
Featured speakers include the CIO of the City of Santa Monica, the former Sheriff of Los Angeles County, and the CIO of the City of Long Beach.

Change Management Discussion Group
Instructor: Melissa Henley, Director of Customer Experience, Laserfiche
Is convincing people to change “the way it's always been done” a challenge? Come meet other attendees to exchange best practices, share successes and challenges in leading change, and learn more about how to drive success as a change agent.
Track: Product Training

Build knowledge and skills with classes taught by Laserfiche product experts on the wide range of tools available in the Laserfiche product suite. These highly informative presentations and hands-on training labs cover topics from beginner to advanced and highlight tools that lay the groundwork for going beyond everyday tasks to achieve digital transformation. Topics are focused into five categories defined by role: New User, Developer, Laserfiche Admin, IT Admin, and Process Designer.

Wednesday & Thursday General Sessions
Join us in the Pacific Ballroom for this can’t-miss-session featuring the biggest highlights of Empower: the Laserfiche executive and product teams will share exciting product updates, inspiring stories, industry insights and their vision for the future of Laserfiche.

Developer

Developer 101: Overview of SDK Programming
Instructor: John Shupe, Senior Presales Engineer, Laserfiche
Laserfiche provides a number of ways to access the system programmatically, offering different tools for different jobs. This course will help you get started with integrations.

In this session, you will learn:
- Fundamental concepts of building an integration.
- Tools available in the Software Developer Kit (SDK).
- SDK tool capabilities and how to make the most of them.

Developer 102: How to Integrate with the Web Client
Instructors: Ryan Schooley, Senior Software Test Engineer, Laserfiche | Marjorie Principato, Software Engineer II, Laserfiche
The Laserfiche web client allows you to display and access content stored in Laserfiche. Come see how you can leverage quick and easy integration points to connect the Laserfiche web client with other web applications.

In this session, you will learn how to:
- Display external applications directly in the web client through custom metadata tabs.
- Embed the Laserfiche web UI into other websites using iframes.
- Use custom actions to extend the web client interface.

**Developer 201: Creating Integrations with the Laserfiche SDK**

Instructor: Robert Strickland, Staff Software Engineer, Laserfiche

Laserfiche SDK integrations broadly fall into two camps: retrieving data from a repository or storing data in a repository. This course covers the ins-and-outs of these types of integrations as well as everything you need to know to get started programming with the Laserfiche SDK, such as creating connections in Laserfiche.

In this session, you will learn how to:
- Sign in and out.
- Retrieve and store data within a repository.
- Avoid common pitfalls when working with the SDK.

**Developer 202: Creating Custom Integrations with Laserfiche Workflow**

Instructor: Brandon Gaw, Senior Software Engineer, Laserfiche | Lee Norgaard, Software Engineer II, Laserfiche

Come to this class to see how Laserfiche Workflow can be used to create custom integrations for proprietary software and other 3rd-party systems used by your organization. You'll see examples of how various Workflow activities can be leveraged in these custom integrations.

You will learn about:
- The HTTP web request Workflow activity.
- The scripting/SDK scripting Workflow activities.

**Developer 203: Advanced WebLink Customization**

Instructors: Cecilia Villatoro, Software Engineer II, Laserfiche | Melanie Johnson, Software Engineer III, Laserfiche

Join this class to learn how to go beyond out-of-the-box functionalities by using CSS and JavaScript to customize the appearance and behavior of WebLink.

In this class, you will learn how to:
- Use styling to hide parts of the page that users may not need, or to change the position, size, and colors in ways that the Designer tool does not cover.
- Use scripts to change what's displayed when a page loads, such as defaulting to full-screen mode in the document viewer.
- Use scripts to add popular features to the pages.
- Change local files on the machine to configure search results, user session timeouts, and more!
Developer 301: Scripting and Customization with Laserfiche Forms
Instructors: Tracy Cao, Software Engineer, Laserfiche | Derek Edrich, Software Engineer II, Laserfiche
Take your knowledge of Laserfiche Forms to the next level.
In this session, you will learn:
• How to easily add libraries to use in your scripts.
• CSS-based scripting and ways to alter the appearance of your forms.
• JS-based scripting and ways to add functionality to your forms.

Developer 304: Serverless Integrations
Instructor: Geoff Hsieh, Technical Team Lead, Laserfiche
Come to this class to see how Laserfiche can be leveraged across a serverless architecture to help solve custom integration needs in a low-cost alternative to a traditional server architecture. You will learn:
• How to use a serverless set up to connect Laserfiche to custom proprietary software.
• A helpful guide for using Laserfiche with a serverless setup.

IT Administrator

IT Admin 101: Overview of Laserfiche Architecture
Instructor: Eddy Jones, Lead Software Engineer in Test, Laserfiche
New to Laserfiche administration? Learn about the Laserfiche suite architecture and important aspects of application interaction.
This class will cover:
• Laserfiche Server and repository architecture.
• Individual application framework.
• Application communication to the Laserfiche Server.
• Licensing and backup considerations.

IT Admin 102: Intro to Laserfiche Server Administration (Lab)
Instructor: Nicole Moulton, Senior Technical Trainer, Laserfiche
Get started in Laserfiche as an IT Administrator by building an understanding of the server-wide tools that are available.
In this session, you will learn how to:
• Create a new repository.
• Create a new volume and use checksums.
• Set server settings such as server timeout.

IT Admin 103: Introduction to Directory Server Administration (Lab)
Instructor: Kathleen Park, Senior Presales Engineer, Laserfiche
Whether you’re using Laserfiche Directory Server for Avante or Rio, you’ll want to familiarize yourself with the powerful options that are available.

Come to this class to learn the following and more:

- How single sign-on can help give your users a more seamless experience.
- How to use Active Directory groups to dynamically assign user licenses.
- How to manage Laserfiche users and groups.

**IT Admin 201: Designing a Laserfiche Environment**  
**Instructor:** Braden Young, Solutions Engineer, Laserfiche  
Learn how to design a Laserfiche environment to support organizational requirements from small business to enterprise. In this session, you will learn about:

- Laserfiche system architecture and best practices.
- How to avoid common performance bottlenecks.
- High-availability and load-balanced configurations.

**IT Admin 202: Planning and Preparing for a Laserfiche Upgrade**  
**Instructor:** Alexandre Bourdois, Technical Support Specialist, Laserfiche  
Planning on upgrading your Laserfiche system? In this session, you will learn how to plan and execute a successful upgrade project, including how to:

- Gather requirements for an upgrade.
- Prepare necessary documentation.
- Account for the unexpected.

**IT Admin 203: Optimizing System Performance in Laserfiche Forms and Workflow**  
**Instructor:** Will Swygert, Solutions Engineer II, Laserfiche  
Ensuring your Laserfiche solution meets your performance requirements is as important as the solution’s design, and it requires the same level of attention. In this session, you will learn:

- Design paradigms for optimal performance.
- Product features that affect speed and efficiency.
- Tool and practices for monitoring and quantifying performance.

**IT Admin 204: Troubleshooting the Laserfiche Ecosystem**  
**Instructor:** Karina Rubin, Senior Implementation Engineer, Laserfiche
Part of the power of the Laserfiche product suite is how different applications can work together to achieve a wide range of solutions. However, the level of cross-application interaction also increases the complexity to maintain these solutions.

In this presentation, we will use an example Laserfiche system architecture to discuss the following topics:

- Dependencies among Laserfiche applications, to help guide thinking through troubleshooting scenarios where multiple Laserfiche products are involved.
- Architectural patterns of Laserfiche applications, where system-level tools can be used for Laserfiche-independent troubleshooting strategies.
- Considerations when troubleshooting integrations of the Laserfiche suite with other line-of-business applications.

**IT Admin 205: Securing Your Network Environment**  
Instructor: Alex Kang, Software Engineer in Test II, Laserfiche  
Many Laserfiche applications run on web servers that communicate with one another and with users. This class will describe best practices for securing these network communications, including in cases where a web server is accessible to the public.  
In this session, you will learn:

- How to encrypt your data in transit.
- IT best practices in a network environment.
- How to make Laserfiche accessible from outside your organization.

**IT Admin 206: Migrating to Laserfiche Directory Server**  
Instructor: Anita Chiang, Presales Manager, Laserfiche  
If you're considering adding Laserfiche Directory Server (LFDS) to your existing Laserfiche system, planning out your user migration approach will simplify the transition.  
In this class you will learn about:

- Available user license types and their technical requirements.
- How to migrate users that already exist within the Laserfiche Server and Forms.

**IT Admin 207: Troubleshooting Laserfiche Access and Authentication**  
Instructor: Neal Jordan, Software Support Engineer II, Laserfiche  
The first step to using a Laserfiche system is logging in. But if login fails, it can sometimes be a challenge to trace the exact reason why, especially if in a distributed production setting with multiple identity providers and layers of network security. Join us for a look at how one can approach issues with authentication to Laserfiche services, including the following topics:

- Configuring single sign-on with Laserfiche Directory Server across Laserfiche web applications.
The concept of federation: logging into Laserfiche with a user whose definition may come from Active Directory or an outside SAML identity provider.

Facilitating secure authentication across domain boundaries or in perimeter networks.

**IT Admin 301: Backup and Encryption Strategies**
Instructors: Alex Glickman, Solutions Engineer, Laserfiche | Charles Chen, Solutions Engineer, Laserfiche
Enterprise customers typically have a unique set of requirements as it relates to backing up and encrypting their Laserfiche system. Whether it is backing up your 5TB repository in an 8-hour window or new regulations requiring you to encrypt your Laserfiche Volumes at-rest, it is all in a day’s work for the Enterprise system admin.
In this session you will learn:
- Various strategies to backing up large Laserfiche repositories within your backup window.
- How to encrypt Laserfiche data in-transit and at-rest.

**IT Admin 302: Designing an Implementation for Consistency and Scalability**
Instructors: Nick Littman, Solutions Engineer, Laserfiche | Joe Murphy, Technical Manager, Laserfiche
Following best practices an enterprise customer developed in conjunction with Laserfiche Consulting, this class will teach you several ways to develop a Laserfiche system with consistency and scalability in mind. They include repository design and security, department and user setup, system structure and naming conventions, and Workflow and Forms tips and tricks. This class will dive into what works, what to avoid, and the benefits of a consistently-built, scalable system. While this session is oriented toward larger deployments, the lessons can apply to Laserfiche solutions of all sizes.

**IT Admin 303: Deploying Laserfiche on AWS and Azure**
Instructor: Samuel Carson, Enterprise Solutions Architect, Laserfiche
Did you know on-prem Laserfiche solutions aren’t confined to your own data center? As public cloud adoption skyrockets, customers and solution providers look to self-host Laserfiche in their own cloud environments. Join this session to learn:
- How to automate a Laserfiche installation with the new Laserfiche Deployment Toolkit.
- Considerations for designing a Laserfiche environment in the public cloud.
- Compute, storage and networking options for Laserfiche on AWS and Azure.

**IT Admin 304: Advanced Topics in Identity Management**
Instructor: Brianna Blanchard, Senior Technical Product Manager, Laserfiche
This course is for IT professionals, solution providers or anyone responsible for configuring login across their Laserfiche system. Whether you are looking to move to Laserfiche Directory Server authentication for the first time, or are looking to expand your existing single sign-on (SSO) implementation, join this class to learn:
- How to configure Laserfiche SSO for new and existing systems.
- How to connect SAML providers to Laserfiche.
• How to use SSO features such as multi-factor authentication.

**IT Admin 305: Troubleshooting Laserfiche System Activity and Resource Usage**
Instructor: Miruna Babatie; QA Manager, Release Manager; Laserfiche
Monitoring the health of any software system requires measurement of key application and system metrics, and a Laserfiche system is no exception. This talk will showcase some out-of-the-box system metrics provided by Laserfiche Server, Full-Text Search and Indexing Service (FTS), and Laserfiche Workflow Server, as well as considerations for determining whether a given measurement is an indicator of a deeper adverse condition. Discussion topics will include the following:
• Best practices for the greatest gains in consuming Windows- and Laserfiche-provided performance counters.
• Managing FTS memory usage and configuration, and checking index and catalog status.
• Using the Workflow administration console to measure and manage Workflow queue status and database usage.

**Laserfiche Administrator**

**Laserfiche Admin 101: Best Practices in Repository Design**
Instructor: Chris Rom-Toribio, Presales Engineer, Laserfiche
Come learn how to build an organized, efficient repository that makes it easy to find what you're looking for.
In this session, you will learn:
• Best practices for repository structure, metadata use and folder and document naming.
• Guidelines for automation and other tools that can help create and maintain a good repository structure.
• Strategies for reorganizing a system that has outgrown its original design.

**Laserfiche Admin 102: Getting Started Administering the Repository (Lab)**
Instructor: Francisca Wood, Presales Engineer, Laserfiche
New to administering Laserfiche? This course covers what an administrator needs to know to get a repository up and running.
In this session, you will learn how to:
• Set up and manage users and groups.
• Create templates, fields and other forms of metadata.
• Apply default settings such as saved searches to simplify the end user experience.

**Laserfiche Admin 103: Administration in Laserfiche Cloud**
Instructor: Shawn O’Neill, Senior Technical Product Manager, Laserfiche
This class covers the basics that you should know before you begin administrating and working in Laserfiche Cloud.
In this session, you will learn how to:
Choose how you want to configure authentication options in ACS, including federated users, Laserfiche users, ADFS, and single sign-on.
- Manage user access to Laserfiche applications.
- Configure out-of-the-box integrations.
- Monitor system usage.

**Laserfiche Admin 104: Overview of Laserfiche Security**  
Instructor: Mark Malburg, Sales Engineer, Laserfiche  
New to security in Laserfiche? This course provides an overview of Laserfiche security and the available options.  
In this session, you will learn:
- Basic concepts in repository security, including entry access rights and privileges.
- How to configure roles and security options for process automation tools.

**Laserfiche Admin 105: Applying Security in the Laserfiche Repository (Lab)**  
Instructor: Karina Rubin, Senior Implementation Engineer, Laserfiche  
Once you have picked up the basics in Overview of Laserfiche Security, learn how to implement repository security and take control of your Laserfiche system.  
In this session, you will learn how to configure:
- Folder-level security for granular control of what users can and cannot access.
- Administrative security to control what functionality users have.
- Security settings to prevent mistakes in filing and searching.

**Laserfiche Admin 106: Getting Started Auditing Your Repository (Lab)**  
Instructor: Kathleen Park, Senior Presales Engineer, Laserfiche  
Laserfiche Audit Trail tracks and records events in Laserfiche, such as logging in, changing a field value, deleting documents and more.  
In this session, you will learn how to:
- Set up the Audit Trail reporting interface.
- Run reports to monitor system activity.
- Use Audit Trail for security and information governance.

**Laserfiche Admin 201: Best Practices in Laserfiche Repository Security**  
Instructor: Connie Anderson, Senior Technical Writer, Laserfiche
Laserfiche offers a wide range of security options. Some methods of security implementation will suit your needs better than others. In this class, we will walk you through the security features available in your Laserfiche repository, providing you with a strong grounding in security concepts and the best ways to implement them.

In this session, you will learn how to:

- Set up entry access rights, the powerful core of repository security, to maximize efficiency, minimize mistakes and avoid administrative headaches.
- When to use additional security options that let you fine-tune your system to meet your needs.
- Plan your security options so that your repository is easy to maintain as your organization grows and changes.

**Laserfiche Admin 202: Laserfiche Records Management (Lab)**

Instructor: Alyssa Mathias, Technical Trainer, Laserfiche

Implementing records management in Laserfiche involves configuring rules in your repository, setting up the file system and then managing records.

In this session, you will learn about:

- New functionalities introduced in Laserfiche 10.4.
- Defining and configuring records management rules.
- Setting up your records management file plan.

**Laserfiche Admin 203: Personalizing Laserfiche WebLink to Fit Your Needs (Lab)**

Instructor: Siddharth Chaubal, Presales Engineer, Laserfiche

Whether it’s making public records available to your citizens or providing access for customers who need to see their files, Laserfiche WebLink is the tool you need for distributing your documents via the Internet.

In this session, you will learn how to:

- Customize the appearance of your interface online with the WebLink designer.
- Personalize WebLink to look and feel like your website.
- Make functionality changes to meet your users’ needs.

**Laserfiche Admin 301: Advanced Metadata: Fields & Templates**

Instructor: Connie Anderson, Senior Technical Trainer, Laserfiche

Fields and templates offer many ways to organize, retrieve, and work with documents in your repository, making your information easier to store and easier to access. This session will provide a deeper look into these features for administrators who are already familiar with the basics of Laserfiche metadata.

In this session, you will learn how to:

- Standardize content in your repository using field formats and constraints.
- Store a wide variety of information in flexible ways using dynamic fields, import profiles, and multi-value field groups.
- Enable users to quickly find the content they need with powerful field search and indexing tools.
Laserfiche Admin 303: Automating User Onboarding
Instructor: Jeffrey Thomas, Solutions Engineer, Laserfiche
Managing an enterprise deployment can be time consuming: adding users, licensing and setting up security can really start to take over an administrator's day. This session will provide insights and cover best practices for onboarding and managing users across the Laserfiche Ecosystem.
In this session, you will learn how to:
- Synchronize Forms Teams with your LFDS groups.
- Onboard large numbers of external users with minimal administrator support.
- Develop a Forms onboarding process that fits your organization’s needs.

Laserfiche Admin 305: Troubleshooting Laserfiche System Activity and Resource Usage
Instructor: Miruna Babatie; QA Manager, Release Manager; Laserfiche
Monitoring the health of any software system requires measurement of key application and system metrics, and a Laserfiche system is no exception. This talk will showcase some out-of-the-box system metrics provided by Laserfiche Server, Full-Text Search and Indexing Service (FTS), and Laserfiche Workflow Server, as well as considerations for determining whether a given measurement is an indicator of a deeper adverse condition.
Discussion topics will include the following:
- Best practices for the greatest gains in consuming Windows- and Laserfiche-provided performance counters.
- Managing FTS memory usage and configuration, and checking index and catalog status.
- Using the Workflow administration console to measure and manage Workflow queue status and database usage.

New User

New User 101: Overview of the Tools in the Laserfiche Suite
Instructors: Louis Nees, Customer Success Manager, Laserfiche | Maria Kennedy, District Manager, Laserfiche
New to the Laserfiche suite? About to implement a Laserfiche system?
In this session, you will learn:
- The basic components of the Laserfiche suite.
- Ways to use each component to meet your business needs.
- Best practices from customer use cases.

New User 102: Working with Documents in the Laserfiche Repository (Lab)
Instructor: Chris Rom-Toribio, Presales Engineer, Laserfiche
New to Laserfiche software? This class will teach you the basics, so you can use your system effectively.
In this session, you will learn how to:
- Work with documents and folders in the web client.
- Apply metadata and annotations.
- Configure the user interface to fit your needs.
New User 103: Getting Started with Searching (Lab)
Instructor: Siddharth Chaubal, Presales Engineer, Laserfiche
New to Laserfiche software? This class will teach you the basics, so you can use your system effectively.
In this session, you will learn how to:
• Work with documents and folders in the web client.
• Apply metadata and annotations.
• Configure the user interface to fit your needs.

New User 104: Finding the Capture Tool that Fits Your Needs
Instructors: Fernando Soto, District Manager, Laserfiche | Charles Suzara, Regional Manager, Laserfiche
Learn about the numerous capture tools that are available for quickly and easily getting documents into your Laserfiche repository, and see how you can determine which ones best meet your business needs.
We’ll cover tools for:
• Basic and high-volume scanning.
• Capturing information through forms.
• Creating snapshots of webpages and other media.
• Capturing documents while away from the office.
• Automatically importing and routing documents from network drives or email servers.

New User 105: Getting Started with Laserfiche Scanning (Lab)
Instructor: Maria Ramos Sandez, Technical Trainer, Laserfiche
Laserfiche provides a variety of ways to add content to your repository, including scanning paper documents. This class demonstrates how to use Laserfiche Scanning.
In this session, you will learn how to:
• Scan documents using basic and standard scanning modes.
• Clean up and index your documents with simple image enhancements.

New User 106: Overview of the Laserfiche App
Instructors: Zack Domangue, District Manager, Laserfiche | Omer Sheikh, Business Development Manager, Laserfiche
Whether you’re at your desk or in the field, maximize your productivity by staying connected with the Laserfiche App.
In this class you will learn how you can:
• Capture, search, and edit documents from your mobile device.
• Submit forms and approve tasks both online and offline.
• Leverage features unique to the Laserfiche App.

New User 107: Overview of Laserfiche WebLink and Public Portal
WebLink is a user-friendly public portal website that provides read-only access to documents. In this session, you will learn about:

- Features and functionality of WebLink.
- Tips and tricks for effective use.
- Case Studies from implementations across industries.

**New User 108: Accelerating High-Volume Capture with Quick Fields**

Instructors: Stanley Halim, District Manager, Laserfiche | Melissa Vazquez, Customer Success Manager, Laserfiche

This presentation introduces Laserfiche Quick Fields, a flexible batch-scanning tool designed to simplify automated capture, classification and organization of documents. In this session, you will learn about potential use cases and how to:

- Streamline document classification and data extraction.
- Automate document naming and filing.
- Improve the efficiency of scanner operators using Quick Fields Scanning.

**New User 109: Streamlining Information Capture and Review with Forms**

Instructors: Monty Ashton-Lewis, District Manager, Laserfiche | Alex Matos, Regional Manager, Laserfiche

Laserfiche Forms offers quick, simplified data collection and processing for your entire organization. In this session, you can see how different organizations are leveraging this tool and learn how you can:

- Easily build forms without any coding experience.
- Publish web-based forms that people outside your organization can use.
- Automatically route and manage information through forms.
- Gain insight with reporting tools to help identify bottlenecks.

**New User 110: Automating Business Processes with Workflow**

Instructors: Christian Hughes, District Manager, Laserfiche | Andrew Nunes, Customer Success Manager, Laserfiche

Workflow is a tool for automating the flow of business processes and documents. This course will give an overview of the functionality and features. In this session, you will learn:

- How to use Workflow's business process automation tools.
- How Workflow can increase your productivity through automation.

**New User 111: Overview of Laserfiche Cloud**

Instructors: Elliot Ammon, District Manager, Laserfiche | Christian Preciado, Customer Success Manager, Laserfiche

Laserfiche cloud is a multi-tenant SaaS platform that provides comprehensive document management functionality alongside process automation capabilities. In this session, we will cover:

- Advantages of utilizing the Laserfiche Cloud platform.
- Security provisions for your governance needs.
New User 112: Overview of Metadata  
Instructors: Maria Ramos Sandez, Technical Trainer, Laserfiche  
Laserfiche metadata allows users to define important key words and indexing information to ensure that content is easy to find and work with.  
In this class, you will learn how to:  
- Work with frequently used metadata types in Laserfiche.  
- Locate documents using metadata.  
- Use metadata to automate business processes.  

New User 113: Time-Saving Tips & Tricks  
Instructor: Misty Blair, Senior Technical Writer, Laserfiche  
This presentation will teach you time-saving tips and tricks in Laserfiche to help you manage documents flexibly and efficiently.  
In this session, you will learn:  
- Ways to navigate and view documents more efficiently.  
- Tips for searching, including quick search and saved searches.  
- Useful features to help you get the most out of working with your documents.  

New User 114: Using Laserfiche to Collaborate  
Instructor: John Shupe, Senior Presales Engineer, Laserfiche  
Laserfiche isn’t just a place to store your archived records—there are a variety of tools that enable your organization to work together on active documents, as well as involve external parties in your processes.  
In this class, you will learn how to:  
- Leverage Office 365 for in-browser document coauthoring.  
- Share files with external parties using new secure file sharing.  
- Update content on the go with the Laserfiche app.  

Power User  

Power User 101: Easy Integrations with Laserfiche Connector (Lab)  
Instructor: Jeremy Setty, Technical Trainer, Laserfiche  
Laserfiche Connector is a simple, code-free way to integrate line of business applications like CRM and ERP systems with Laserfiche.
In this session, you will learn how to:

- Set up Connector-based integrations.
- Use third-party applications to search for information stored in Laserfiche.
- Assign metadata to a scanned document from information in a third-party application.

Power User 201: Intermediate Laserfiche Connector (Lab)
Instructor: Siddharth Chaubal, Presales Engineer, Laserfiche
Learn about more features in Laserfiche Connector that can help you further streamline and refine your integrations.
This class will cover how to use Connector to:

- Retrieve information from multiple applications with a single profile.
- Run workflows on specific entries.
- Retrieve information from a window using optical character recognition (OCR).

Power User 202: Reporting and Analytics in Forms
Instructor: Lei Pu, Software Engineer II, Laserfiche
Learn how to use the powerful reporting tools provided in Laserfiche Forms to monitor performance and help ensure greater efficiency.
In this session, you will learn how to:

- Navigate your way through new Forms Reporting.
- Use the report creation wizard to define new reports.
- Take, create and share report snapshots.
- Use insights charts to gain visibility into your processes.

Power User 203: Using CSS to Style Your Forms
Instructor: Jennifer Knull, Software Engineer, Laserfiche | Jimmy Lu, Software Engineer II, Laserfiche
Learn how to style your Laserfiche forms using built-in tools and CSS customizations.
In this session, we will cover:

- Styling forms using the Themes tab.
- Basic CSS and adding CSS classes to fields.
- Deciding which elements to target with your CSS.
- CSS examples for styling your form.

Power User 205: Streamlining Processes and Business Decisions in Laserfiche Cloud (Lab)
Instructor: Kevin Roberts, Software Test Engineer III, Laserfiche
Join us to learn how to streamline process design with the tools available in Laserfiche Cloud! Using tools such as decision tables, formulas, and other business rules, you can create reusable logic to be shared across your business processes.
In this session, you will learn:

- Ways to create modular rules to simplify your process design.
- How to use decision tables to represent complex logic in visual tables.
- Best practices when creating processes in Laserfiche Cloud.

**Power User 301: Advanced Searching and Syntax**

Instructor: Brianna Blanchard, Senior Technical Product Manager, Laserfiche

This course is for power-searchers, administrators or anyone who needs to configure searches for others in their organization. The same concepts are useful when configuring Quick Fields, Workflow and Connector to perform searches.

In this session, you will learn how to:

- Expand on standard search functionality with Laserfiche search syntax.
- Create complex searches.
- Utilize advanced tips for working with wildcards.

**Process Designer**

**Process Designer 101: Creating Your First Laserfiche Form (Lab)**

Instructor: Jessica Heffner, Technical Trainer, Laserfiche

Ready to start creating forms? Learn the fundamental aspects of designing and building forms and their associated processes.

In this session, you will learn how to:

- Build web-based forms to capture information and launch processes.
- Streamline your form layout using conditional rules and display settings.
- Route forms for review and approval.

**Process Designer 102: Designing Sessions with Quick Fields (Lab)**

Instructor: Francisca Wood, Presales Engineer, Laserfiche

Learn the basics of designing automated capture processes with Laserfiche Quick Fields.

In this session, you will learn how to:

- Start designing capture processes using the Quick Fields interface.
- Collect and store documents using batch scanning.
- Automate data entry and document naming and filing.

**Process Designer 103: Getting Started Automating Processes with Workflow (Lab)**

Instructor: Maria Ramos Sandez, Technical Trainer, Laserfiche

New to Laserfiche Workflow? This lab will take you step-by-step through building your first workflow, giving you the tools you’ll need to start automating your own organization’s business processes.

In this session, you will learn how to:
• Become familiar with the interface and tools of Laserfiche Workflow.
• Route documents for approval.
• Use Workflow to automatically send email notifications.

Process Designer 104: Overview of Robotic Process Automation
Instructor: Cosette Dwyer, Product Manager II, Laserfiche
Discover how to transform your processes using Robotic Process Automation! RPA provides a no-code way to pass data between applications and automate repetitive manual tasks. In this session, you will learn:
• The automation and integration capabilities offered by RPA.
• How to create and configure a bot using its recorder and designer.

Process Designer 105: Getting Started with Capture Profiles in Laserfiche Cloud (Lab)
Instructor: Alyssa Mathias, Technical Trainer, Laserfiche
Capture profiles are an exciting new tool in Laserfiche Cloud that allow you to build more streamlined and dynamic capture processes.
In this course, you will learn:
• How to configure a capture profile to extract key information from documents.
• Best practices for making capture profiles robust and accurate.
• How to configure a workflow to automatically trigger capture processing.

Process Designer 106: Business Process Automation Workshop
Instructors: John Shupe, Senior Presales Engineer, Laserfiche | Kathleen Park, Senior Presales Engineer, Laserfiche | Anita Chiang, Presales Manager, Laserfiche | Alan Chan, Director of Presales and Technical Training, Laserfiche | Karina Rubin, Senior Implementation Engineer, Laserfiche | Maico D’Arbel, Technical Team Lead, Laserfiche
Join this interactive workshop session to collaborate with Laserfiche product experts and other users in building an automated solution for an everyday business process, such as records requests, new account opening, onboarding or contract management. Attendees will collectively decide on a process to automate, and then our experts will bring the solution to life with input from the audience.
Come to this class to learn:
• How to get started on new automation projects.
• Which tools in the Laserfiche suite work best in different situations.
Process Designer 107: Document Capture Scenarios Workshop  
Instructor: Tessa Adair, Product Manager III, Laserfiche  
In this interactive workshop, users will: 
• Review a variety of document capture tools, including Laserfiche Scanning, Quick Fields, Import Agent, and more. 
• Work in groups to determine the best solutions for various document capture scenarios. 
• Gain understanding of the role capture plays as part of a complete Laserfiche solution.

Process Designer 108: Lunch Q&A: Automating Processes  
Instructor: TBD  
Join our product experts for lunch! You bring the questions about automating processes, and our technical and business implementation experts will provide the answers.  
In this session, you will learn: 
• Best practices, tips and tricks. 
• Common mistakes and useful workarounds. 
• New product features to be aware of.

Process Designer 109: Lunch Q&A: Forms  
Instructors: Jared Rechnitz, Senior Technical Product Manager, Laserfiche | Xiuhong Xiang, Staff Software Test Engineer, Laserfiche | Robert Gordon; Staff Software Engineer, Lead; Laserfiche | Zian Zhou, Staff Software Engineer, Laserfiche  
Join our product experts for lunch! You bring the questions about Laserfiche Forms, and our technical and business implementation experts will provide the answers.  
In this session, you will learn: 
• Best practices, tips and tricks. 
• Common mistakes and useful workarounds. 
• New product features to be aware of.

Process Designer 201: Pattern Matching  
Instructor: Jeremy Setty, Technical Trainer, Laserfiche  
Learn how to increase the level of automation and efficiency in your Laserfiche system with pattern matching.  
In this session, you will learn how to: 
• Create regular expressions. 
• Define field formats, extract information and sort documents using patterns. 
• Create more efficient and dynamic processes in Laserfiche Workflow and Laserfiche Quick Fields.

Process Designer 202: Intermediate Forms Design (Lab)  
Instructor: Nicole Moulton, Senior Technical Trainer, Laserfiche  
Learn how to use Laserfiche Forms to build better processes and customize the appearance of your forms.
In this session, you will learn:

- How to use variables to create dynamic processes.
- How to set up lookups to automatically populate data from an external source.
- How to create custom errors for your process.
- More techniques for formatting your forms and processes.

**Process Designer 203: Best Practices in Forms Process Design**  
Instructor: Shawn Li, Software Engineer II, Laserfiche  
Learn how to build better business processes in Laserfiche Forms.  
In this session, you will learn fundamentals of BPMN and how to:

- Distribute and delegate activities among team members.
- Use gateways to control decision making.
- Modify processes in a test environment.
- Add sub-processes into your Forms processes.

**Process Designer 204: Building Business Processes in Laserfiche (Lab)**  
Instructor: Anita Chiang, Presales Manager, Laserfiche  
As part of the Process Automation suite in Laserfiche Cloud, business processes provide a simple way to collect user submissions and route them to the right place.  
In this class, you will learn how to:

- Modify your business processes while keeping track of new versions.
- Leverage other Process Automation components such as workflows and rules within your business process.
- Access insight reports to identify process bottlenecks.

Instructor: Alexandria Tuttobene, Senior Software Engineer in Test, Laserfiche  
This course will teach you how to streamline document review and metadata entry in Laserfiche Quick Fields.  
In this session, you will learn how to:

- Enforce consistency and accuracy of metadata using field constraints and field lookups.
- Configure additional tools for facilitating data validation.
- Ensure a painless scanner operator experience.

**Process Designer 206: Best Practices for Process Optimization in Quick Fields**  
Instructor: Tessa Adair, Product Manager III, Laserfiche
Quick Fields has many powerful options for processing scanned documents, and each implementation has its own unique challenges. Join this session for tips on making Quick Fields sessions flexible, efficient and accurate.

In this session, you will learn how to:
- Determine which data extraction processes are best for your documents and business needs.
- Configure common processes to extract information accurately and efficiently.
- Ensure that your Quick Fields sessions are easy to understand and maintain.

Instructor: Jeremy Setty, Technical Trainer, Laserfiche  
Go beyond the basics of Laserfiche Workflow! Learn how to build workflows to handle more complex processes and systems.

In this session, you will learn how to:
- Iteratively process batches of documents using For Each activities.
- Develop more complex logic by nesting various conditional activities.

**Process Designer 208: Translating Processes into Laserfiche Workflow**  
Instructor: Grant Walker, Software Engineer III, Laserfiche  
Learn the logic behind Workflow that will help you translate any business situation into a Workflow process.

In this session, you will learn:
- A simple method to break difficult tasks into steps that can be easily translated into Workflow.
- Combinations of Workflow activities that can work together to automate complex tasks.
- Ways to solve any Workflow challenge.

**Process Designer 209: Best Practices for Designing Laserfiche Workflows**  
Instructor: Winston Kao, Build and Release Engineer III, Laserfiche  
Take your workflow designs from intermediate to advanced with these expert strategies.

In this session, you will learn how to:
- Create and organize dynamic workflow processes.
- Create and monitor specific starting rules.
- Monitor workflow instances.

**Process Designer 210: Automating Records Management**  
Instructor: Joseph Strietzel, Software Engineer in Test III, Laserfiche  
Elevate your Laserfiche records management solution by automating notifications, filing and more! Using out-of-the-box functionality added in 10.4, Laserfiche can streamline your records management processes even further.

In this session, you will learn how to:
- Send notifications when records require action.
- Classify and set records retention rules as a part of business process automation.
- Perform records management actions with the Set Records Management Properties Workflow activity.
Instructor: Preston Lee, Software Test Engineer II, Laserfiche
Learn how to use Laserfiche Forms to build more complex processes by leveraging advanced features in both the forms designer and process designer.
In this session, we will cover:
- Working with variables and using them in calculations.
- Using timers, signals and error events to enhance your processes.
- Introduction to using JavaScript and CSS to customize form layout and behavior.

Process Designer 302: Advanced Quick Fields Session Design (Lab)
Instructor: Nicole Moulton, Senior Technical Trainer, Laserfiche
This course will help users with foundational knowledge of Laserfiche Quick Fields get to the next level.
In this session, you will learn how to:
- Use more advanced capture techniques.
- Capture information across multiple pages.
- Use advanced token features.

Process Designer 303: Working with Workflow and Forms (Lab)
Instructor: John McNamara, Senior Presales Engineer, Laserfiche
Used together, Laserfiche Workflow and Forms can expand your process automation capabilities with user-friendly interfaces and highly-detailed automation and integration activities, bringing you the best of both worlds.
In this session, you will learn how to:
- Choose which tool to use for specific parts of your process.
- Pass information collected in a form to a workflow for additional processing.
- Update Forms variables at intermediate stages in your process with a workflow.

Process Designer 304: Integrating Forms with the Web Client
Instructor: Tesia Au, Solutions Engineer II, Laserfiche
Learn when and how to integrate Laserfiche Forms interfaces into the web client using custom tabs.
In this class we will cover:
- How to configure custom tabs.
- How the WebAccessAPI is used.
- How to link Repository Metadata to Laserfiche Forms fields.
Process Designer 305: Process Automation Administration in Laserfiche Cloud
Instructor: Kevin Roberts, Software Test Engineer III, Laserfiche
Learn how to support your users and facilitate integrated processes in Laserfiche Cloud! This class will explore administrative options and advanced tools in Process Automation.
In this session, you will learn:

- How to set up Remote Agents to use data sources and bots.
- Ways to access data through web services, external sources, and more.
- Options to centrally manage settings to be used in workflows.

Track: Product Innovations
Learn about all of the newest and most exciting developments with Laserfiche software, including the latest features as well as upcoming releases and the future roadmap of innovations.

Wednesday General Session
Join us in the Pacific Ballroom for this can’t-miss-session featuring the biggest highlights of Empower: the Laserfiche executive and product teams will share exciting product updates, inspiring stories, industry insights and their vision for the future of Laserfiche.

Thursday General Session
Join us in the Pacific Ballroom as we spotlight the successes of the Laserfiche customer community. Speakers from Collin County, TX; superyacht operator Riela Yachts; Standard Bank, Africa’s largest lender; agricultural company The Wenger Group; and the City of Santa Monica, CA, will share how Laserfiche has helped them go beyond expectations and power innovations in service delivery, customer service and more. You’ll also find out who won the first ever Customer’s Choice Run Smarter Award – chosen by the Laserfiche community.

Lunch Q&A: Everything You Ever Wanted to Know About Empower
Instructors: Danielle Gilstrap; Content Manager, Corporate Events; Laserfiche | Justin Pava, Principal Technical Product Manager, Laserfiche | Anita Chiang, Presales Manager, Laserfiche | Mayra Garcia, Marketing Coordinator
You’ve arrived at Empower 2020, and now you want to make the most of your time here. This part-presentation, part-Q&A session will help you take advantage of the many opportunities available.
In this session, you will learn how to:
Choose courses that will help you build and refine important skills
Utilize the resources provided at the conference Build professional connections with other attendees

Coming Attractions in Laserfiche
Instructor: Justin Pava, Principal Technical Product Manager, Laserfiche
Join Laserfiche Technical Product Managers as they present upcoming items on the Laserfiche development roadmap. From short-term features to long-term initiatives, you won’t want to miss this look into the future directions of Laserfiche. Note: this class covers future capabilities that are not yet scheduled to be part of any specific release.
Join us to see:
• Demos of the most exciting upcoming features.
• What’s ahead on the Laserfiche software roadmap.

Accelerating Deployment with Business Process Templates
Instructor: Brandon Buccowich, Product Marketing Manager, Laserfiche
The Business Process Library provides templates to automate a variety of common industry- and department-specific business processes. With out-of-the box solutions for contract management, new hire onboarding, public records requests and more, this collection of processes is easy to configure and can help expedite implementation.
In this session, you will learn:

- What is included in a business process template.
- The simple steps to download a template from the library.
- How to configure templates to jump-start business process automation in your organization.

**What’s New in Laserfiche**

Instructors: Jared Rechnitz, Senior Technical Product Manager, Laserfiche | Sarah Wefald, Senior Product Manager, Laserfiche

The Laserfiche software development team has been hard at work over the past year, adding new features and functionality to your favorite Laserfiche products. Join us for an overview of these updates.

**Top Three Learning Resources to Grow Your Laserfiche Knowledge**

Instructor: Mandana Basetvat, Director of Learning & Development, Laserfiche

Join this session to learn how to utilize product documentation, on-demand videos and our certification program to grow your knowledge of Laserfiche. In this session, we will:

- Access the features of the Laserfiche Learn & Support site and show you how to find information with just a few clicks.
- Explore the benefits of our on-demand video training library, advanced search options and our refreshed product help files.
- Demonstrate how you can become a Laserfiche Certified Professional.
- Take a look at our new learning management system that will provide a sleek and centralized interface for accessing all Laserfiche learning resources.

**Five Trends That Will Shape the Future of Work**

Instructor: Jason DelValle, Senior Product Marketing Manager, Laserfiche

The future of work is a hot topic, with conflicting information from various experts leaving plenty of room for debate around what impact automation technology like artificial intelligence and robotics will have on your office. Learn how Laserfiche is helping you get ready, with machine learning to help automate and streamline processes and document management, new collaboration technologies and advanced automation tools.

**Integrating Laserfiche with Microsoft Dynamics 365**

Instructor: Liyun Zhao, Technical Product Manager, Laserfiche
When you integrate Laserfiche process automation with the powerful features of Microsoft Dynamics 365 for Sales, organizations can focus on what they do best—drive revenue. In this session, we will highlight how to integrate Laserfiche and Microsoft Dynamics 365, including some no-code features to make integrating even easier!

This session covers:

- An overview of the integration.
- Benefits of integrating Laserfiche with Microsoft Dynamics 365.
- Key integration features and configuration steps.

Collaborating with the Laserfiche Microsoft Office 365 Integration
Instructor: Ian McCready, Senior Product Manager, Laserfiche
You’ve most likely used our Office Plug-in to open Microsoft Office documents in Laserfiche or archive emails directly from Microsoft Outlook. But that’s not all—learn about everything that is included in our Microsoft Office 365 integration. Discover how you can strengthen collaboration in your organization.

Enhanced Reporting & Insights in Laserfiche Forms
Instructor: Sebastian Kmiec, Software Engineer II, Laserfiche
In this session, you’ll learn about the new reporting capabilities in Laserfiche Forms. This class will focus on the out-of-the-box Insights reports highlighting process efficiency and work load distribution, as well as out-of-the-box reporting on individual forms. We'll also discuss some ideas for how to make processes easier to report on.

On the Go? The Laserfiche App Can Help!
Instructor: Hui Ren, Senior Technical Product Manager, Laserfiche
The Laserfiche app is an easy to use and versatile tool for iOS and Android devices that enables you to access repositories, capture images, submit and approve forms, initiate workflows and more. In this session, you’ll learn how you can use the Laserfiche app to fill out forms and keep business processes moving so you can get work done no matter where you are—even when you don’t have Wifi or data access!

Using Reporting and Analytics to Drive Transformation
Instructor: Brandon Buccowich, Product Marketing Manager, Laserfiche
By bringing together data from across the business, companies can get real-time insights into finance, sales, marketing, product development, and other departments. These insights enable teams within a company to collaborate better, achieve better results, and outperform the competition. However, very few companies have realized the importance of analyzing this data to drive organizational change. In this session, learn how everyone in your organization can use data and reports in Laserfiche to increase productivity and enhance decision-making, so you proactively identify issues, drive change and make your organization more efficient and productive.

Starting a Process with an Email
Instructor: Ian Merna, Technical Product Manager II, Laserfiche
There are a lot of ways to get data into Laserfiche. This course will highlight one specific method, Email Archiving! Come to this session to see a demo of Email Archive and learn about how you can use it to kick off your automated processes.

Leave the Busy Work to the Bots
Instructor: Cosette Dwyer, Product Manager II, Laserfiche
Have you heard about Robotic Process Automation (RPA), an innovative, no-code technology which can automate manual, repetitive data entry tasks? Discover the many ways you can use software bots to boost productivity. You’ll also get a first look at new functionality in Laserfiche RPA including the bot recorder, new ways to integrate with external applications and how RPA bridges last-mile gaps in your automated processes.

AI and Machine Learning: The Key to Digital Transformation
Instructor: Tessa Adair, Product Manager III, Laserfiche
Using AI and machine learning to transform operations, service delivery and business models is key to future success. As you look toward AI to accelerate digital transformation, it’s a good time to think about how Laserfiche can play a part. What organizational goals can you achieve through using AI features in Laserfiche? Why can AI in Laserfiche help you make better decisions? Join us to for a look at the future of Laserfiche – and how it can drive digital transformation in your organization.

The Value of Intelligent Capture in Accounts Payable
Instructor: Shawn Bradford, Principal Software Engineer, Laserfiche
Processing invoices is a necessity for all organizations. To enable more efficient and streamlined AP invoice processing solutions, Laserfiche will be releasing intelligent capture capabilities, where machine learning technology is used to automatically recognize invoices and extract data. In this session, learn the advantages of intelligent capture and machine learning in AP processes like invoice processing; how to eliminate the tiresome work of manual data entry and associated errors; and how this new solution will integrate with existing Laserfiche solutions. You’ll also get a first look at our new invoice processing solution in action.

Simplify Compliance with Flexible Records Management
Instructor: Justin Pava, Principal Technical Product Manager, Laserfiche
Laserfiche has provided industry-leading Records Management capabilities for over a decade, but there’s always room to grow and enhance. Laserfiche 10.4 brought the largest update to Records Management functionality since its initial release, allowing organizations to organize, manage, and work with records in the way that works best for them. Learn how this new functionality can help your organization manage records more easily and more efficiently.
Stringent Compliance Requirements? Meet Laserfiche Vault
Instructor: Linda Ding, Director of Strategic Marketing, Laserfiche
Laserfiche Vault is a solution package of services and cloud-based functionalities that provide a secure and accurate system of record to support organizations in industries that demand non-rewritable, non-erasable digital records retention requirements. Learn how Vault’s strict records management retention features, readily available audit reports, and optional designated third-party services (D3P), all backed by industry-leading AWS cloud security, can help you gain confidence and peace of mind in facing stringent compliance requirements.

Securely Sharing Files with Laserfiche
Instructor: Justin Pava, Principal Technical Product Manager, Laserfiche
Currently, you may use email, paper, third-party or FTP sites to share files with customers, constituents or partners, which may not always be the most secure approach. To address this need, Laserfiche has developed secure file share. In this overview, learn more about this new capability and how it can help your organization work more efficiently and securely.

Delivering Value with Digital Transformation
Instructor: Jason DelValle, Senior Product Marketing Manager, Laserfiche
In 2017, Laserfiche unveiled the Digital Transformation Model, a roadmap to help organizations on their paths towards digital transformation. In this session, you’ll learn how the Laserfiche Digital Transformation Model has evolved and how you can leverage each pillar in the new Digital Transformation Model to fundamentally transform the way you do business, including:

- How to evaluate which digital transformation pillar is most important to your organization.
- How successful organizations approach digital transformation.
- How to get your colleagues on board with digital transformation.

Web Client Usability Enhancements
Instructor: Nick Madden, UX Lead, Laserfiche
This session will cover three exciting usability enhancements that have recently been added to the web client on Laserfiche Cloud: search improvements, web scanning, and Office Online with coauthoring capabilities. We will share the research that helped create the best possible solutions, as well as a walk-through of key updates to the interface and functionality.

Streamlining Onboarding for External Collaboration
Instructor: Brianna Blanchard, Senior Technical Program Manager, Laserfiche
Our customers, constituents, suppliers and partners have technology expectations based on social media, shopping online and self-service portals for work and home. How do we keep up with their expectations? Laserfiche portals help you work smarter and provide quality service to everyone you work with, while Laserfiche automation speeds up the onboarding process. In this session, you will learn how users can access or share the documents and forms they need without the wait.
Track: Success Stories

Get an in-depth look at how other Laserfiche users have developed and fine-tuned implementations that transformed their organizations, helping them go beyond ordinary results to reach mission-critical goals. They’ll share the results they have achieved plus the lessons they have learned from their experiences. These classes include case studies from Runs Smarter award winners, who have been recognized for their achievements in creating innovative and results-oriented solutions.

Welcome to the Jungle
Instructor: Lena Spencer, Administrative Secretary, Linn-Benton Community College
Welcome to the Jungle is a short presentation that looks at three areas of forms development:
• Process for developing new forms with the best practices of process mapping and using the library.
• Some cool tools in form development such as lookup fields, javascript and recapta.
• Best practices for troubleshooting - making frequent copies of forms and looking at logs.

Digital Government: Enhancing the Citizen Experience with Laserfiche
Instructors: Alan Karasin, Senior Network Administrator, City of Ithaca | Julie Holcomb, City Clerk, City of Ithaca
According to the Center for Digital Government, the citizen experience/engagement rank high in technology priorities for state and local government. As citizens and employees expect more digital services in government, it is imperative for governments to capture, manage, and automate processes to enhance the citizen experience. The City of Ithaca is re-imagining their public service deliveries by streamlining its special events permit, marriage license, as well as its boards and committees appointment process.
This class will discuss in detail:
• Creating opportunities to rethink, redesign and improve business processes.
• Avoiding pitfalls by utilizing strategies for getting people onboard with change and keeping the momentum going.
• The efficiencies the City of Ithaca has achieved by using this approach, benefiting both employees and constituents.

There and Back Again: A Journey in Change Management
Instructor: Amy Johnson, Senior Systems Administrator, Hanover County
Change is hard and inevitable--whether it’s new compliance regulations or an addition to your tech stack. Join this session to learn how Hannover County Commissioner of the Revenue managed the shift from a mainframe to a Windows-based system, and the lessons they learned along the way.
You’ll gain tips on how to:
• Determine which aspects of your Laserfiche implementation need to be considered when rolling out a change initiative.
• Formulate a working plan to address upcoming changes and incorporate major stakeholders to ensure all your bases are covered.
• Handle unexpected outcomes and adapt to the “new normal.”

**Build it and They Will Come: Effective Repository Designs and Workflows**
Instructor: Robyn Biggar, Records and FOIPPA Administrator, City of Port Coquitlam
The City of Port Coquitlam faced challenges of manual data entry and departmental silos. By focusing on user's needs and creating solutions that are simple and straightforward, they not only increased usage but also created more efficient processes that enable staff to do more of the work that matters and ensure records are also being properly administered. Join this session to see how they:
• Reduced the amount of manual work for staff by simplifying and automating filing.
• Utilized transparent records management to make it easier for staff to find and work with their documents while ensuring records are properly administered.
• Eliminated silos to ensure that all staff are referring to the same policies and procedures.
• Put a positive spin on change and created excitement for expanding the use of the system.

**Saving Lives & Optimizing Service Delivery: Digitizing and Automating Critical Processes in Minutes**
Instructors: Tim Nolan, Applications Manager, Collin County | L'Cena Parsons, Records Management Officer, Collin County
Join this session for a look at how Collin County, Texas, automated the complex and time-sensitive Early Identification of Mental Illness (EIMI) process. The County was able to utilize Laserfiche Forms and Workflow to cut down processing time from hours to minutes, ensuring files are easy to find and meet compliance requirements with the state's 12-hour turnaround time for completing the screening process.
See how the County:
• Decreases hours of processing time for one of the most essential processes in the organization.
• Maintains a quick turnaround time with timers and notifications to enable screenings take no more than 8 hours to complete from start to finish.
• Sort, store, and automatically apply the appropriate records management properties in Laserfiche.
• Uses this project to develop best practices for future automation initiatives.

**Integrating Laserfiche Forms with a Chatbot for Optimized User Experience**
Instructor: Mark McIntyre, Senior Software Developer, Cabarrus County Government
See how Cabarrus County transformed its lengthy and cumbersome performance evaluation form into a 4-step, self-guided process using a chatbot. Now with just a few clicks, supervisors are able to submit the results of their employees' evaluations without having to manually look up their information, and the data is automatically routed to HR and Payroll for processing and then saved in Laserfiche.
Come learn how they:
• Used an opensource JavaScript library to integrate a chatbot interface into their form.
• Enhanced the employee experience by creating a personalized, guided walkthrough that only shows staff relevant information.
• Decreased data entry errors by enabling autofill of employee info from their database.
• Transformed one of the least popular forms in the county into a quick and painless experience.
Our Top Five Workflow Tools for Cultivating Digital Transformation
Instructor: Kathy Koren, Software Support Technician, Educational Service District 112
Join Kathy Koren as she shares 11 years' worth of experience working with Laserfiche to streamline processes and achieve digital transformation at Educational Service District 112, including automating processes across departments and programs. She'll highlight her top five most effective tools in Workflow, including examples of how they can be leveraged to achieve maximum efficiency. Come learn about:

- Automating routine tasks and creating more agile workflows.
- Monitoring exceptions to ensure they're handled quickly.
- Quickly locating documents used in your processes.
- And more great tips for leveraging the power of Workflow.

Automating Transparent Records Management: How to Find the Best Approach for Your Organization
Instructor: Marty Gaffney, Network Analyst, Town of Okotoks
When designing a records management solution, exploring different options can help organizations find the best fit for their needs. See how the Town of Okotoks developed their optimum solution by using Workflow to pull information from a central data source to determine how incoming records are handled. They'll cover:

- How the organization refined and simplified its original process design.
- Evaluating the pros and cons of the various approaches that can be taken for TRM.
- Why designing successful solutions should never be a one-size-fits-all model.

Increase Visibility and Decrease Disruption: Automating Student Records Handling
Instructor: John Rokenbrod, Software and Records Analyst/RMO, Bryan Independent School District
Bryan Independent School District comprises over 20 schools and 16,000 students. Join this session to see how they've saved hundreds of hours of staff time by automating complex processes surrounding student records. Learn from their Software and Records Analyst how they:

- Reduced disruptions on campus by digitizing records requests, court orders and subpoena processing.
- Created greater visibility for records managers, school administrators and district attorneys.
- Ensured consistency, reduced task overlap, and minimized staff hours spent responding to subpoenas.
Understanding Shared Services: Three Perspectives from Industry Leaders
Instructors: Allison Young; Regional Director, Strategic Sales and Service Delivery; Laserfiche | Andrew Fertig, Technical Project Manager, Laserfiche | Gregory McLeymore, Project Manager, Compass Group | Jeffrey Phillips; Associate Director, IT Solutions and Support; Texas A&M University | Chuck LaRue, Application Administrator, Alabama Office of Information Technology
Organizations have been implementing centralized shared services since the mid-1980’s, but it still has significant value in reducing cost, improving efficiency and controls, and enhancing service levels. Whether you are evaluating your options around a Laserfiche shared service or interested in the scalability of Laserfiche at an enterprise level, this course is for you. Our expert panelists will discuss their experiences setting up a shared service for Laserfiche across multiple departments, agencies, or universities.
Topics will include:
• Why choose a shared service?
• Infrastructure, scalability, and security considerations.
• Cost-recovery models/strategies.
• Challenges and recommendations.

Increasing Vendor Engagement with Laserfiche
Instructors: Gregory McLeymore; Project Manager, Sr.; Process Designer | Katie Morgan, Senior Solutions Architect, Laserfiche
Compass Group will be sharing how they are using Laserfiche Forms and Community License to promote direct communication with their vendor community. This class will feature vendor use cases including:
• Vendor invoice portal.
• Vendor surveys.
• Vendor compliance processes.

Utilizing Continuous Improvement Tools to Drive Process Development
Instructor: Jason Andrews; Continuous Improvement Manager; Sperry Rail, Inc.
As the world leader in Rail Health® solutions, helping railroads achieve continuous safety and performance improvements, Sperry Rail needed a way to ensure that their field employees have access to the most up-to-date documentation in near real-time. Learn how they used Laserfiche Forms and Workflow to create a solution that is helping earn them ISO 9001-2015 certification, decreased equipment downtime by 8%, and has saved over $100,000 in lost revenue. They’ll also provide insight on how they used Lean and Six Sigma tools to gain stakeholder buy-in and pave the way for future expansion.
The Right Tools for the Job: Increasing Efficiency with Laserfiche
Instructor: Gert Bester, Systems Manager, Pepkor Properties
Fed up with lost documents, massive Excel sheets, lack of standardization, and not being able to keep up with contracts, Pepkor Properties, the largest retail group in South Africa, implemented Laserfiche in 2013 across their Legal and Admin teams. Since then, they have saved over $30,000 in resources and staff time. Come learn how they:

• Integrated Laserfiche with a system developed in-house, including an Oracle database.
• Use Workflow to file, search for, and distribute minutes to board meetings, saving hundreds of hours of staff time.
• Achieved even greater efficiency by using decision tables with data retrieved from Laserfiche.

Paperless Procurement Processing
Instructor: Rutta Kahwa, Head of Procurement, PACT Tanzania
Procurement processing used to be a lengthy and expensive process for PACT Tanzania, an NGO focused on improving the lives of orphans and vulnerable children. With Laserfiche, they have automated this whole process and consolidated all activities into a procurement plan sheet that facilitates the approval process for stakeholders. Come join this session to see how they realized major time and cost savings by automating a myriad of processes within the finance department, including expense reimbursement, money advance requests, and employee delegation.

The Journey to Digitizing a Fleet Management Business
Instructor: Justin Thomas, Head VAF: Strategic Alliances and Business Innovation, Standard Bank Group
Standard Bank is a South African financial intuition offering personal and business banking, wealth management and corporate and investment banking services. One of the largest lenders in Africa, the bank has branches around the world. Using Laserfiche, they have digitally transformed their process. Previously managed by email and Excel, Standard Bank now auto-generates and digitally signs all documents, automating processes. In this class you will learn how to:

• Use change management to ensure users embrace change.
• Balance user requests and the needs of your business.
• Use digital signatures in automating your processes.

St. Paul’s Digital Transformation Story: Simplifying and Automating Administrative Tasks
Instructor: Neville Atkinson, Business Manager, St Paul’s College
Learn how St.Paul’s College, a private Catholic school in South Australia, uses Laserfiche to support their growth and the increasing number of administrative processes required to support staff and students. Predominantly paper-based, these processes were often cumbersome and required significant effort from staff. In this class, you will see how they:

• Implemented Laserfiche Business Process Automation under limited budget and resources.
• Overcame major obstacles encountered during the project and realized key achievements.
• Developed a vision for future opportunities.

Digitizing Banking Operations with Laserfiche
Instructor: Zahi Krayem, Business Analyst – Application Administration Section IT Department, BBAC
Minimizing risk, reducing paper, and improving client relationships are just some of the benefits BBAC achieved by implementing Laserfiche as a centralized place to store and process information. Creating new accounts, ensuring regulatory compliance, reviewing files, and distributing monthly statements are all easier now. Join this session to see how they:
• Eliminated repetitive work and decreased confusion in the process of creating client files.
• Use Laserfiche Workflow to streamline new account creation, including gathering multiple approvals and requesting revisions.
• Reduce the risk of fraud with automatic transaction reconciliation with their core banking system.

Maintain Control of a Growing Business with Laserfiche Workflow and Forms
Instructor: Kenny Wong, Managing Director, Bubblelab Laundry Sdn Bhd
With 180 branches and counting, Bubblelab Laundry needed a way to centralize business operations and ensure timely completion of processes. In just six weeks, they implemented five workflows that have allowed them to streamline the maintenance request process and monitor progress of service, saving them $44,000 annually and decreasing issue response time by 73%. Join this session to learn how they:
• Gained greater visibility into their processes and simplified the maintenance process for their staff.
• Simplified scheduling and distribution of service tickets, saving at least half an hour every day.
• Developed KPIs to monitor productivity and find ways to improve their processes further.

Experiences in Effective Digital Transformation
Instructor: Alan Yue; Senior Vice President, Information Technology; MSIG Insurance (Hong Kong) Limited
When implemented at the management level, digital transformation solutions benefit both organizations and their clients. After integrating Laserfiche in MSIG’s customer claim submissions process, the company saw improvements in staff productivity and customer satisfaction. In this session, we will share our experiences and insights from implementing Laserfiche as part of MSIG’s unique digital transformation strategy, including challenges and key success factors, as well as how Laserfiche contributed to our achievements and shaped our vision for the future.

Tailoring Laserfiche to Meet Organization and Employee Needs
Instructor: Damon Munt, Chief Operations Officer, Enterprise and Training Company Limited
Technology should enhance both staff productivity and user experiences, especially when managing contracts with tight audit and documentary evidence requirements. Successful implementation of a content management solution requires integration with key applications, as well as ensuring that the software is adaptable and meets the needs of the
organization. With over 21 years of experience in handling government funded contracts, Damon Munt, Chief Operations Officer of ETC Ltd, will share his insights on how Laserfiche solutions can be deployed to ensure compliance and accuracy when handling government contracts, as well as automate unique document management processes. This session will touch on tailoring Laserfiche to organizations’ specific needs through process automation, document management rules and effective integration with existing systems. These steps can help organizations adhere to audit regulations, improve efficiency and save time that can be re-invested back into delivering effective customer service.

**Mitigating Risk and Health & Safety Compliance with Forms and Workflow**

Instructor: Veronique Osvalt, Business Process Analyst, Cold Storage Nelson

Cold Storage Nelson is a New Zealand-based company specializing in controlled temperature storage and logistics. Meeting customer needs and legislative requirements and mitigating financial risk are some of the key benefits experienced by the organization after implementing Laserfiche. In this session, Veronique Osvalt will share how Laserfiche has been deployed to streamline service to customers and improve processes including reporting, staff communication, reduced paper costs and compliance. Join this session to see how they:

- Automate and monitor key functions using real-time data.
- Use Workflow and Forms to improve Health & Safety compliance.
- Develop automated processes throughout the organization.

**Enhancing Productivity Through Automation Frameworks**

Instructor: Aparna Mazumdar, Sr. General Manager, Sun Pharmaceuticals India Ltd

Data and document management can be key success factors in highly regulated environments, such as in pharmaceutical research and development. Firms can utilize Laserfiche to manage both regulatory and non-regulated content to drive productivity, enforce data integrity and ensure compliance with industry-specific regulations. Since implementing Laserfiche in 2003, Sun Pharmaceuticals has achieved greater data reliability, automated key processes and established a highly efficient and compliant digital workspace. This session with Aparna Mazumdar, Senior General Manager at Sun Pharmaceuticals, will cover how Laserfiche can be implemented using frameworks for content management and business process automation solutions. Attendees can explore how Laserfiche can help increase efficiency and ensure regulatory compliance - drawing from use cases from Sun Pharmaceuticals’ operations in a highly-regulated international context, these steps can be applied to processes in a wide range of industries.

**Connecting the Dots with Laserfiche**

Instructor: Arti Sahoo, IT Systems Analyst, Kensington Mortgages Limited | Farid Amin, Solutions Architect, Kensington Mortgages Limited

Seamless document management processes are an essential part of business operations for a wide range of industries, including in Financial Services. Robotic and Business Process automation is rapidly becoming a necessity to help firms increase efficiencies and allowing for scalability. Arti Sahoo and Farid Amin, IT Systems Analyst and Solutions Architect at Kensington Mortgages, will share their experiences on how they have used Laserfiche to solve complex document processing, automate business processes and connect the user to the virtual workforce (RPA). Attendees have an opportunity to learn about how Forms and Workflow can help achieve Robotic Process Automation and Business
Process Management through complex document transforming, compiling and routing. Join this session to see how they:

- Use Workflow for advanced document processing
- Use Forms to implement complex business processes
- Customize Forms using JavaScript and CSS
- Invoke a virtual workforce (RPA) session from Laserfiche

**Track: Solution Provider**

*Solution Provider classes cover solutions for Laserfiche resellers looking to improve their reach in targeted markets, improve sales strategies and gain a competitive advantage.*

**Solution Provider General Session**

Join us in the Pacific Ballroom for this critical session featuring the biggest highlights for VARs: the Laserfiche executive and product teams will share the latest product updates, industry insights and their vision for the future of Laserfiche.

**Industry Trends and Opportunities for Laserfiche Solution Providers**

Instructors: Linda Ding, Director of Strategic Marketing, Laserfiche | Ryan Park, State & Local Government Marketing Manager, Laserfiche | Noel Payne, Software Marketing Specialist I, Laserfiche | Grace Ding, Education Marketing Manager, Laserfiche

With an increased budgetary pressure and heightened concerns over meeting digital consumer expectations, the need for businesses across industries to “stay current and scalable” remains a key priority. Laserfiche technology plays a critical role for helping organizations to achieve the digital transformation, especially in Education, Financial Services, Government and Manufacturing industries.

Join this session where the Laserfiche Industry Marketing Group will go over:

- 2020 industry trends that will continue driving Laserfiche investments.
- Mapping of Laserfiche opportunities in key vertical markets.
- New sales tools for winning the deals.

**Digital Marketing for Solution Providers: Learn to Supercharge Your Lead Funnel**

Instructor: Dan Komin; Associate Director, Demand Generation; Laserfiche

Digital marketing has become an increasingly important tactic for B2B companies, as executives predict that it will drive nearly half of their revenue by 2020. But with limited budgets and stiff competition from other marketers, this opportunity can be difficult to seize. Join this session to discover key ways that solution providers can use digital marketing to support their lead generation goals.

You will learn:

- What digital channels you can leverage to generate high-quality leads for your business.
• How you can create digital content—or use content created by Laserfiche—to educate leads throughout the buyer’s journey.
• How you can measure the right goals to determine what impact digital marketing has on your bottom line.

Customer Retention 101: Grow Your Business by Selling More to Current Customers
Instructor: Melissa Henley, Director of Customer Experience, Laserfiche
Customer retention is one of the levers to a successful business. Since it typically requires more time and money to attract new clients than it does to upsell existing accounts, a strategy that focuses on customer retention can pay off in a significant way.
In this session, you’ll learn:
• The importance of focusing on customer success and customer experience.
• The metrics that matter to customer health.
• Strategies to boost customer retention.

So You’re a New Solution Provider? Now What?
Instructor: Tom Hogue, CEO/Founder, Momentum ECM
This course is designed to share a successful solutions provider’s experience starting down a new vertical and adding Laserfiche to his business. Tips to succeed as well as pitfalls to avoid will be discussed with honesty and candor. Your own personal mentor for an hour, join this session to hear strategies for developing your approach, training your staff, acing your client meetings, and developing your best solutions.

Grow the Value of Your Business Faster with Laserfiche Subscription Licensing
Instructor: Jereb Cheatham; Vice President of Business Development; OPG-3, Inc
If the value of your business is based on annual recurring revenue, the solutions you sell should maximize that value. With subscription licensing, you can address mission-critical business problems with a pilot budget and put yourself in a position to rapidly expand the implementation. This course will focus on using subscription licensing to solve bigger business problems, significantly increase services revenue and provide your customers with a vision for enterprise deployment. It will also address important considerations related to transitioning to subscription licensing including cashflow, compensation and customer success.

Implementation Best Practices
Instructors: Esther Chow, Director of Sales Operations and Customer Success, Laserfiche | Jason Beck, Senior Engineer, Momentum ECM | Justin Steen, Business Transformation Program Manager, CDI | Jeremy Braisher, Director of Operations, ImageNet Consulting | Aaron Appleman, Consulting Director, CDI

Transitioning from sale to implementation to support has numerous challenges. Join our experts as they speak about their experiences and best practices on implementing Laserfiche systems.

In this session, you will learn:

- How to transition from sale to implementation.
- Ways to keep clients’ business needs first during system design.
- Project management revolving deployment.
- Best practices for maintaining customer satisfaction post-implementation.

New Beginnings: Master the Art of Reaching Out to Prospects
Instructor: Joe Thomas, Founding Partner, Impact Advantage

Learn strategies that will help you successfully invite potential partners to explore a relationship. In this session, we'll explore how to:

- Determine the best channel for reaching out: voicemail, email, snail mail, or a combination?
- Develop a strategy for how many times to reach out and identify signals to keep going or stop.
- Guide the dialogue forward so prospects clearly understand the value of your offering.

Guiding Conversations: Make Stronger Connections with Prospects
Instructor: Joe Thomas, Founding Partner, Impact Advantage

Practice techniques that will help buyers discover more value and create higher levels of engagement early in the sales cycle. Learn how to foster and enhance trust and rapport to strengthen any relationship and grow your business. In this session, we'll cover:

- How prospects evaluate a vendor’s competence and character and how to clearly communicate value.
- The signals that indicate your message is resonating with your audience or if it's missing the mark.
- How to maximize each exchange with potential partners.

Closing the Gap: Getting from Demo to Deal
Instructor: Joe Thomas, Founding Partner, Impact Advantage

See how to create a dialogue that does not put pressure on prospects and still results in more “YES”. We'll highlight one of the most important and least mastered tools: how to effectively ASK for business. Join this session to discover how to:

- Earn the right to ask for the deal.
- Ensure prospects are confident in the ROI.
- Effectively shape the “ASK” to generate better results.

The Cloud Roadmap – Delivering Enterprise-Ready Solutions
Instructors: Katie Gaston; Director, Cloud Program Management; Laserfiche | Daniel Herndon, Senior Product Manager, Laserfiche
Join us for an engaging session where we will discuss strategies for selling and implementing cloud solutions for enterprise organizations. Here’s what you can expect:

- What is the ideal customer profile for an enterprise cloud solution today and in the future?
- What is the difference between Laserfiche Cloud (multi-tenant) and Azure/AWS-supported private cloud (single-tenant)?
- 3-year roadmap for Laserfiche Cloud with a focus on automation feature enhancements, operational improvements and building a solid architectural foundation.
- Implementation best practices including data migrations, deploying and managing cloud solutions and tools for supporting cloud customers.

**Waterfall or Agile, Which Way Should Your Project Swing**
Instructor: Abdul Pandor, Project Manager, Laserfiche
How do you manage successful delivery when your project grows more complex? What skills, tools and techniques do you have available? What would be a professional approach to take in this dynamic, ever-changing project world? In this interactive session, learn how Waterfall and Agile project management concepts can help you at times of need, with examples and scenarios in which they can be implemented.

**Digital Transformation Planning Strategies**
Instructor: Scott Song, Account Manager, Laserfiche
Planning is generally considered one of the most crucial stages for a project as it dictates the outcome for all subsequent steps. With all the various moving parts, stakeholders and agendas, planning digital transformation can sometimes seem like a daunting task. Join this panel discussion to hear the thoughts and experiences of key stakeholders from leading digital transformation projects in the Laserfiche community to help plan your next project.

**Laserfiche Enterprise Deployment**
Instructors: Fai Sham, Presales Engineer, Laserfiche | Samuel Carson, Enterprise Solutions Architect, Laserfiche | David Chen, Director of Information Technology & Security, Laserfiche
Do you have a strategy when implementing Laserfiche Solutions? Are you looking for ideas on implementing Laserfiche enterprise-wide?
Join Laserfiche experts in a discussion on an advancing topic in the Laserfiche community: Laserfiche enterprise deployment. Listen to our Laserfiche experts as they share their experience in:

- Deployment strategies.
- Implementation success.
- Disaster recovery.
- Deployment tools.
And more..

The Evolving State of Privacy and How It Impacts You
Instructor: Amy Lawrence, Privacy Associate, Frankfurt Kurnit Klein & Selz
In the past few years, changing privacy laws have created new obligations and responsibilities that have an outsized impact on digital technologies and the organizations relying on them. Join us for a deep dive into recent and future developments in privacy legislation, and the current impact for you and your customers. In this session we will examine the steps that you can be taking internally and contractually to ensure your own compliance while addressing your customers’ needs. You will learn:

- How to allocate and mitigate the vendor and customer responsibilities Solution Providers face.
- The compliance obligations and concerns most important to your purchasers.
- How to navigate the changing privacy landscape when deploying software solutions.

Track: Solutions Marketplace

Discover how to extend the functionality of Laserfiche with demonstrations of specialized solutions. These classes are presented by members of the Laserfiche Professional Development Program, a community of developers and integrators with decades of experience with Laserfiche implementations.

Fujitsu NX Scanner and Laserfiche – scanning at the edges of business
Instructor: Rob Turner, Partner Alliance Executive, Fujitsu
Join Fujitsu Computer Products of America as we take a deep dive into remote / branch scanning, leveraging the integration between Fujitsu’s newest network scanner, the fi-7300NX and Laserfiche. The direct API level integration allows for scanning from remote devices directly into Laserfiche templates accelerating the processing of paper-based documents. Fujitsu will also discuss the newest subscription options for both scanners and the Laserfiche connector, establishing recurring revenue stream.

Seamlessly Integrate ESRI ArcGIS Maps with Laserfiche Documents Using GeoDocs
Instructor: Kelly McCormick, Lead Sales Engineer, DocuNav
Join us to learn how organizations leverage GeoDocs to seamlessly integrate Laserfiche & ESRI ArcGIS! By connecting map layer data with Laserfiche document metadata, GeoDocs provides several different methods for searching, viewing, importing, and indexing Laserfiche documents—directly from within a ArcGIS map interface. Come to this session to learn how you can:

- Locate critical documents and information stored in Laserfiche from an ArcGIS map.
- Instantly display Laserfiche documents related to specific map locations.
- Import documents to Laserfiche from a map & leverage GIS layer data to eliminate manual data-entry.
• Easily launch & pre-fill Laserfiche Forms with GIS data from selected objects.

Integrated Credit Card Payment Acceptance in Laserfiche
Create a seamless payment experience for users with our out-of-the-box and customizable credit card processing solutions within Laserfiche. In this session, we will showcase service charge capabilities, enhanced security with tokenization, ACH, real time reporting, trackability and how to simplify PCI Compliance.

A Step-by-Step Approach for Advanced Workflows with EzeScan Capture and Laserfiche
Instructor: Michael Woodstock, Technical Manager, EzeScan Support North America
This class will go through a step-by-step look at a solution for everyday capture needs that helps extract information and upload to various business environments, including Laserfiche. We’ll look at how to capture from a range of input streams and how to extract information from various sources, such as the body of an email, attachments, other digital sources and paper. We’ll highlight features such as:
• Extraction of various index fields – both structured and unstructured (including line items).
• Validation of index fields against various line-of-business systems.
• Setting up workflows for users to move images and information through a multi-step approval/routing process.

Use DocuSign with Laserfiche Forms to Automate Agreements
Instructor: Patrick Welsch, President, Cities Digital
People are adopting digital signature more each day. Agreements and contracts need to be dynamic. Learn how you can benefit from DocuSign by using Laserfiche, Laserfiche Forms and Workflow to automate your agreement process. In this session we will explore how to build a form that will create our contract dynamically and automatically push to DocuSign and other applications like Salesforce, Dynamics and Tyler.

Document Management with PremierCOMPRESSION: Save Storage Space, Time & Money
Instructor: Chelsea Dunshee, Strategic Alliance Manager, Panasonic
Join this session to see what sets Panasonic apart—both Image Capture Plus software and a trial version of PremierCOMPRESSION are included right out of the box. Learn how to compress the size of documents by up to 90% and save enough on storage costs to purchase that new software upgrade your organization has been eyeing for a year.

Maximizing Public Meeting Efficiency with the Right Mix of Automation and Integration
Instructor: Blair MacDonald, Territory Manager, eScribe
Every organization is different, so when it comes to selecting technology to support the way you work, ensuring the right fit is obviously important. But just as important is that it provides good integration with your existing components or offers better ones.
This session presents practical ideas on how organizations can leverage automation and integration for greater efficiency in public meetings. We will examine the meeting lifecycle and how a meeting management solution can help you go beyond your existing solution with components like Records Management, Office Productivity (content creation, collaboration, and workflow), Email and Calendars, ADA Compliance, Digital Signatures, Webcasting and Recording, Meeting Room A/V Components, Websites, Request-to-Speak, Electronic Voting, and more.
Epson Product Innovations and Channel Strategies for 2020
Join this session to see Epson Capture Innovations and Strategies for 2020.

Redefining Records Management: A Guide to Going Digital
Instructor: Nina Carter, President, The Information Professionals
Traditional recordkeeping practices required end users to embrace records management. After years of striving to build that recordkeeping culture, we’ve had many lessons learned. During this class, we’ll explore which elements of a traditional records management program are required to support the successful implementation of going digital and how emerging trends are redefining records management.

One Platform, One Purpose – Empower a Modern Digital Government
Instructor: Byron Gillian, Sales Director, Granicus
Effective governments are transforming how they deliver public services and information to their citizens. These cutting-edge governments are deploying a new generation of solutions that shift public services from standardized and manual to personalized and automatic to create one, full digital platform tailored to meet your organization’s unique needs while making your job simpler.
Join Granicus to learn how to boost productivity, enhance workflows, and turn your government organization into an efficiency powerhouse to create one simpler and stronger government and deliver an overall better citizen experience. Learn about the unique Laserfiche integration and how it fits into the mix by quickly and easily uploading files from Granicus Legistar agenda management system into Laserfiche.

Innovation and the End-to-End Invoice Processing Solution: A User’s Experience
Instructor: Jerod Anderson; Chief Information Officer; City of Coppell, Texas
The City of Coppell, part of the Dallas-Fort Worth metroplex, has gained impressive efficiencies from its digital transformation initiatives by leveraging best-in-breed automation technologies—including Laserfiche. So, when decision-makers kicked off a new project in Finance, they applied their same winning strategy. See this compelling presentation and learn how ABBYY’s AI-enabled FlexiCapture for Invoices was identified to automate invoice capture and integrate with Coppell’s new Tyler’s Munis ERP to enable a best practice end-to-end Accounts Payable automation solution.

Achieve Full Cycle Document Processing with eSignatures for Laserfiche
Instructor: Michael Williams, Partner & Developer Technologies Manager, OneSpan
Be it vendor contracts, NDAs and proposals, legal or HR agreements - preparing, managing and sending documents from Laserfiche should be a completely automated digital process.

In this session, you’ll learn the benefits of moving to completely streamlined workflows by adding secure electronic signatures to Laserfiche. Our live demonstration will show how you can leverage e-signatures with OneSpan Sign for Laserfiche with configuration options that let you automate your transactions based on your business requirements. Demo highlights will also include:

- User authentication options and signing methods to support different use cases.
- Workflow automation rules and customization.
- Reports, alerts and tracking progress of digital transactions in real-time.