

DOCUMENT AND WORKFLOW MANAGEMENT



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 **KYOCERA**
Document Solutions

Laserfiche
Authorized Reseller


A Simple, Elegant Approach to Information Management

Twenty years ago, the agile approach to information management hinged on document imaging—the ability to convert paper documents into digital images, saving storage space and retrieval time.

Ten years ago, agile organizations made the leap to document management—technology that manages imaged and electronic documents throughout their life cycles, including capture, filing, access control (security) and archiving.

Today, successful organizations need more than document management. They need to optimize the decision-making process by getting the right content—whether structured or unstructured, paper or electronic, audio or video, photograph or e-mail—into the right hands at the right time.





Laserfiche Avante is a cutting-edge solution that combines comprehensive content management functionality with business process management (BPM) tools to both manage and process information—turning it into an asset that enables efficiency and smart decision making organization-wide.



SPEED
LIMIT
15

DOCUMENT IMAGING

Converts paper documents into an electronic or digital format.

SPEED
LIMIT
25

DOCUMENT MANAGEMENT

Manages documents (physical or digital) throughout their life cycles.

SPEED
LIMIT
45

BUSINESS PROCESS MANAGEMENT

Applies workflow technology to content-related processes in order to standardize and optimize them.

SPEED
LIMIT
65

LASERFICHE AVANTE

Manages all organizational content throughout its life cycle, including acquisition, filing, access control, routing (using BPM) and archiving.

The Laserfiche Avante Advantage



Pull the information you need from:

- ▶ Paper and electronic documents
- ▶ Faxes
- ▶ Paper and electronic forms
- ▶ E-mails
- ▶ Third-party databases and applications



Underpin your information governance strategy with comprehensive security features such as:

- ▶ DoD 5015.2- and VERS-certified records management
- ▶ Digital signatures
- ▶ Role-based authorization
- ▶ Access control
- ▶ Security watermarks and audit trails



Put your information to work with:

- ▶ Microsoft Office® Integration
- ▶ Microsoft SharePoint® Integration
- ▶ Apps for use with iOS and Android™ smartphones and tablets



Instantly search and retrieve information in your office, on your mobile device or over the Internet using:

- ▶ Indexing
- ▶ Property/metadata search
- ▶ Full text search
- ▶ Advanced search
- ▶ Quick Search toolbar



Automate resource-intensive processes by configuring workflows that perform specified actions at appropriate times:

- ▶ Route a document to a specific user
- ▶ Populate a field
- ▶ Send an e-mail
- ▶ Instruct users on next steps in the process
- ▶ Exchange information with other business-critical applications

Functionality, Meet Flexibility

Every organization has its own unique needs. Some are looking for a secure content repository, some need to access information through primary business applications such as GIS or CRM, and some want to enable repeatable processes such as case management, contract management, AP processing and more.

Laserfiche Avante is an agile ECM system that can be quickly and easily configured to meet any organization's needs. In addition to industry-leading content management to help you store, retrieve and secure your information, Laserfiche Avante includes sophisticated workflow tools to automate content-centric business processes while enabling increased visibility into performance.

Laserfiche Avante empowers your organization to operate more efficiently, effectively and profitably by:

- ▶ Managing all organizational content—both structured and unstructured—throughout its life cycle.
- ▶ Ensuring that information is an asset that is consistent, reliable, useful and available.
- ▶ Facilitating compliance with failsafe security and auditing features.
- ▶ Integrating seamlessly with the applications employees use every day.
- ▶ Streamlining operations by automating manual, repetitive processes.



Workflow = Efficiency

With powerful business process management tools, Laserfiche Avante integrates both structured and unstructured content into the flow of your business processes, so you **enhance productivity, improve efficiency and minimize overhead.**

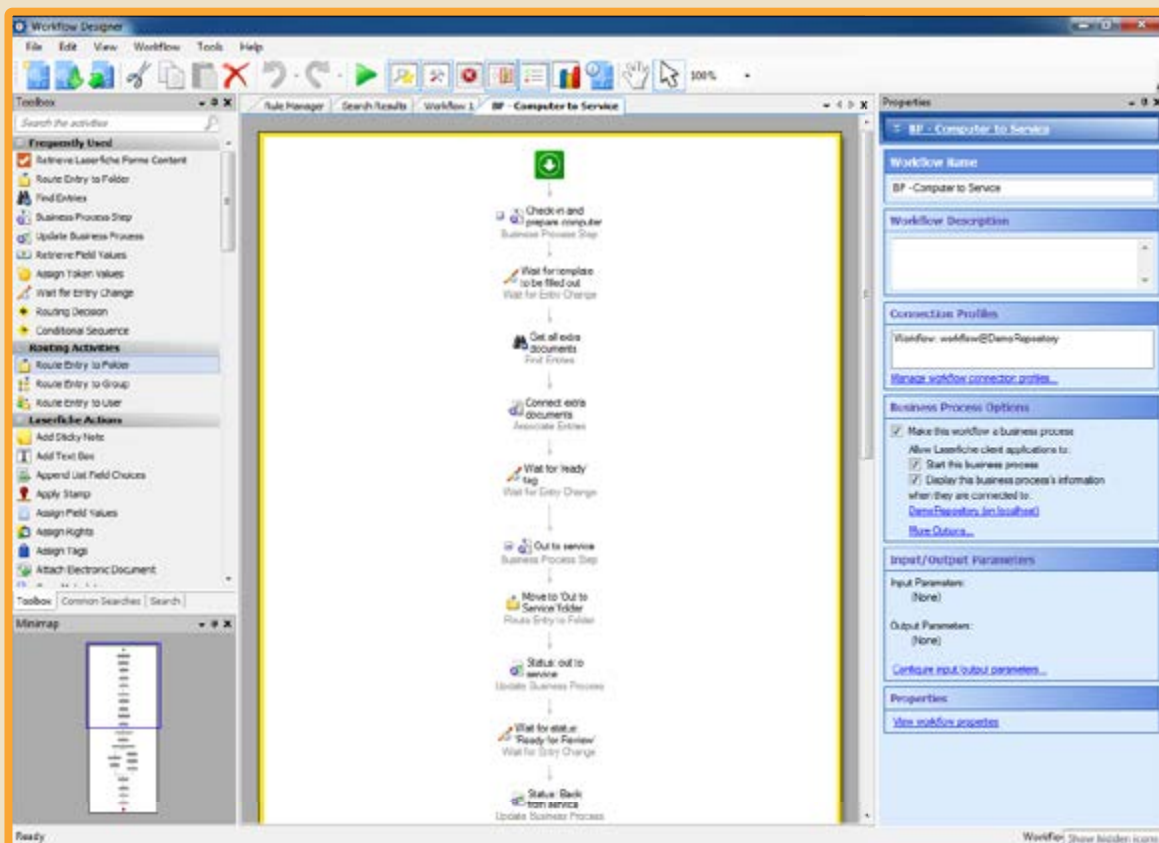
Laserfiche Avante's workflow engine also gives you a platform to map, model and manage your business processes. With reporting features built in, you can quickly uncover and eliminate bottlenecks within your business processes.

- ▶ Increase productivity by automating manual, repetitive processes.
- ▶ Improve visibility into your business processes with easy-to-understand reporting.
- ▶ Model, execute and manage business processes without writing code.
- ▶ Kick off business processes directly from the Laserfiche Client, Laserfiche Web Access or Laserfiche Mobile.
- ▶ Trigger workflows based on actions taken in third-party applications like CRM, GIS, ERP and more.



Easy to Design, Configure and Extend

More than just simple workflow automation, Laserfiche Workflow builds on the capabilities of Microsoft .NET to **seamlessly integrate with your existing systems**, business rules and data.



Built-in activities help you build workflows quickly, while extensible rules and a built-in script editor support custom C# and VB.NET scripting.

A graphical Workflow Designer enables you to create workflows by flowcharting your business processes with an intuitive interface for testing, modifying and supporting workflow activities.

Laserfiche Workflow builds on the capabilities of Windows Workflow Foundation (WF) so you can extend its functionality to all your line-of-business applications.

Laserfiche Avante at Work

Organizations across a wealth of industries use Laserfiche Avante to drive efficiency, cut costs and streamline repeatable processes. The following are just a few examples of **how Laserfiche Avante can transform the way your organization operates.**

Government

Laserfiche Avante moves government agencies beyond finding and filing. With its powerful workflow engine and ability to integrate with a wide variety of enterprise applications, Laserfiche Avante executes repeatable processes in a consistent manner across the organization, optimizing resource efficiency, cost and service delivery.

- ▶ Accelerate finance processes, shortening collection times and reducing banking fees.
- ▶ Eliminate bottlenecks when reviewing, approving and issuing permits, improving customer service.
- ▶ Simplify contract creation using a master template and clause library.

“ Laserfiche Avante allows us to automate processes and more easily access records. Its capabilities help Thousand Oaks maintain high standards of quality and customer service with fewer employees. ”

Antoinette Mann
Deputy City Clerk
City of Thousand Oaks, CA



“ If a firm has a process that involves multiple touches, multiple points of entry and time sensitivity, then Laserfiche Avante’s workflow capability is a viable solution to streamline the process and gain better control. Using Laserfiche, we’ve saved more than 72 hours of labor annually just by automating a single business process. ”

Joseph Salpietro
President and CEO
Xpyria Investment Advisors

Financial Services

Laserfiche Avante improves productivity at financial services firms, enabling employees to spend less time shuffling paper and more time on the profitable, client-facing activities that deliver results.

- ▶ Quickly bring new clients onboard by automating the new account opening process.
- ▶ Automate security and correspondence logs.
- ▶ Route client documents through the approval process with e-mail notifications to ensure timely action.

Laserfiche Avante at Work

Higher Education

Students have higher expectations of their educational investments than ever before. Top institutions have turned to Laserfiche Avante to cut administrative costs, improve information security and facilitate collaboration by making information more accessible.

- ▶ Centrally manage information assets to easily meet recordkeeping requirements, instantly fulfill data and information queries and protect confidential student and faculty files with role-based security.
- ▶ Enhance business office efficiency by automating key business processes including AP processing, HR onboarding and contract management.
- ▶ Ease information-heavy processes such as financial aid applications or student application forms by automatically routing information to specific reviewers.

“ Previously, sending out a big batch of award letters required the letters to be printed, copied, mailed and filed. When I understood that Laserfiche could send those letters to the students’ electronic files with the click of a button, that was a big ‘aha’ moment for me. ”

Clint LaRue

Director of Student Financial Services
Oklahoma Christian University





“ As the nation’s third largest door manufacturer, Steves and Sons produces 3.5 million doors annually. We needed a way to ensure that, from manufacturing to delivery, everything was documented thoroughly. We leveraged the Laserfiche SDK to ensure top quality manufactured products and protection from invalid damage claims. Mobile integration with our Laserfiche Avante system is quite literally changing the way we do business. ”

Tracy Rickman
Application Developer
Steves and Sons

Commercial

As businesses grow and change, so does the amount of information they need to process and manage. Successful businesses count on Laserfiche Avante to satisfy the needs of staff, administrators and IT professionals alike.

- ▶ Accelerate time-to-market by providing users with efficient tools to replace manual tracking processes.
- ▶ Enable multiple departments to authorize changes the moment revisions need to occur, eliminating bottlenecks.
- ▶ Trigger workflow activities from third-party applications.



An Essential Component of Your Connected Framework

“ What sets Laserfiche apart from other ECM solutions is its **ease of administration and use**, which is why we chose it when we standardized our entire county. Laserfiche is the best choice for IT professionals, because it offers more functionality, lower overhead costs and an excellent ROI. ”

Darlene Hale, IT Director, LaPorte County, IN

Laserfiche Avante readily fits into your existing networked environment, without requiring custom programming or extensive hardware and software updates. Developed to support close integration with industry-standard platforms, Laserfiche Avante is compatible with Windows XP through Windows 8 and supports Microsoft SQL Server® and Oracle® database management systems.

- ▶ Administer your system using the desktop Administration Console, from a browser with the Laserfiche Web Administration Console or a snap-in for Microsoft Management Console (MMC).
- ▶ Use of WebDAV technology offers broad interoperability and integration options, as well as support for Microsoft's Web Folders.
- ▶ Assign access rights and permissions directly to Active Directory groups, and maintain security through Windows Authentication.
- ▶ Integrate your primary applications into Laserfiche workflows using the Windows Workflow Foundation and .NET.
- ▶ Drag and drop e-mail from Microsoft Outlook® into Laserfiche, preserving e-mail metadata.



Laserfiche Avante Architecture

By providing central control alongside local flexibility, Laserfiche Avante enables your organization to establish overarching standards and security policies while at the same time giving individual departments the ability to store information and configure business processes according to their specialized needs.

SMARTER OUTCOMES



Publication and Distribution	Enterprise Risk Management	ROI for Repeatable Processes
Enterprise Information Portal	Personalized Interfaces	Value Creation

VALUABLE CAPABILITIES



Transparent Records Management		Business Process Management
Enterprise Classification	Document Capture and ETL	Auditing
Enterprise Search and Retrieval		Information Life Cycle Management

AGILE FRAMEWORK



By serving as the universal repository for all organizational content (including paper, forms, audio/video files, e-mail, etc.), Laserfiche Avante provides a single point of control for complete life cycle management.	By acting as integrative middleware that links into legacy systems and line-of-business applications such as GIS, CRM, ERP and more, Laserfiche Avante allows users to access information in the manner and environment in which they are most comfortable.	By enabling shared services, Laserfiche Avante eliminates data silos and automates cross-functional activities, accelerating collaboration and data processing.
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Laserfiche Avante System Diagram



Out-of-the-Box Functionality











Laserfiche Avante's licensing is based on the number of people who will be using the system—which makes it possible to calculate the cost of most systems by doing little more than counting employees.

Named user licenses include everything you need to get started.

-  **Centralize management of multiple types of information**, including digitized paper documents, electronic documents, e-mail and A/V files. Servers are sold individually and support industry-standard Microsoft® and Oracle® database platforms.
-  **Give users intuitive, instant access to information.** Users each have their own connection through the Laserfiche Client, so they are always able to access their information.
-  **Promote constant productivity** with Laserfiche Workflow's rules-based routing, e-mail notification and activity monitoring.
-  **Add paper documents to your Laserfiche repository** with an intuitive scanning interface.
-  **Create archival TIFF images of electronic documents**, including PDFs, without repetitive printing and scanning.
-  **Protect your information** with comprehensive security features.

Expand Beyond the Basics

Laserfiche Avante's pricing structure makes it simple and affordable to add new features and functionality to your Laserfiche system as your needs change.

-  **Laserfiche Records Management Edition™** fully integrates DoD 5015.2-certified records management with your Laserfiche Avante system.
-  **Laserfiche Audit Trail™** tracks user actions to ensure information security and simplify regulatory compliance.
-  **Laserfiche Quick Fields™** provides high-volume document capture and processing tools.
-  **Laserfiche Forms™** ensures that appropriate action on submitted forms is taken quickly with user-defined approval processes and task lists.
-  **Laserfiche Web Access™** provides authorized users with access to your documents over the web, smartphones and tablets.
-  **Laserfiche Mobile™** for iOS and Android™ smartphones and tablets enables you to capture, upload and securely work with documents inside your Laserfiche repository while on the go.
-  **Laserfiche WebLink™** offers a read-only public Web portal with secure, one-touch document publishing.
-  **Laserfiche Plus™** archives documents on CDs, DVDs, USB drives or external hard drives in self-contained repositories that include built-in viewers and search engines.
-  **Laserfiche Agenda Manager™** automates agenda processes from item submission through publication of the final document.
-  **Laserfiche Digital Signatures** Automatically sign and validate documents as they are created, reviewed and archived without leaving the Laserfiche environment.

Protect the Value of Your Laserfiche Investment

Technology represents one of the most significant investments you make in your organization's success. **That's why Laserfiche is committed to constantly improving its product line to help you meet new business challenges.** The Laserfiche Software Assurance Plan (LSAP) provides your organization with these enhancements as soon as they're released, along with the technical support and detailed technical material that preserves and extends the value of your Laserfiche investment.

LSAP helps you take the guesswork out of budgeting by bundling everything you need to maintain your Laserfiche system into a simple annual payment. It ensures that you have every resource you need to meet technical challenges and expand your Laserfiche infrastructure, including:

- ▶ **Rapid-response technical support.** Your Laserfiche reseller will promptly troubleshoot and resolve any issues that arise—before they impact operations or affect staff productivity.
- ▶ **Online support resources.** Your staff receives access to the Laserfiche Support Site, where they'll find detailed technical information that helps them optimize system performance and maximize uptime, as well as integrate your document repository with your organization's other line-of-business applications.
- ▶ **The latest hotfixes, updates and patches.** These critical items ensure that your Laserfiche system continues to operate at peak efficiency.
- ▶ **New releases.** You'll make sure your system stays current, as new releases of your licensed products are included at no additional charge.
- ▶ **An easy path to growth.** We're committed to continuously improving and expanding the Laserfiche product line. And as we do, you can credit 100% of the purchase price of your current Laserfiche software toward any new product line purchases.



Solution Exchange


How Loudoun County Integrated Laserfiche with Numerous Applications

Contributed by: Jakub Jedzejczak, Enterprise Imaging Team Manager, Loudoun County, VA

Laserfiche is integrated with 19 different systems at Loudoun County, VA—both large and small. Here are a few of our different integrations.

Laserfiche Fax Solution

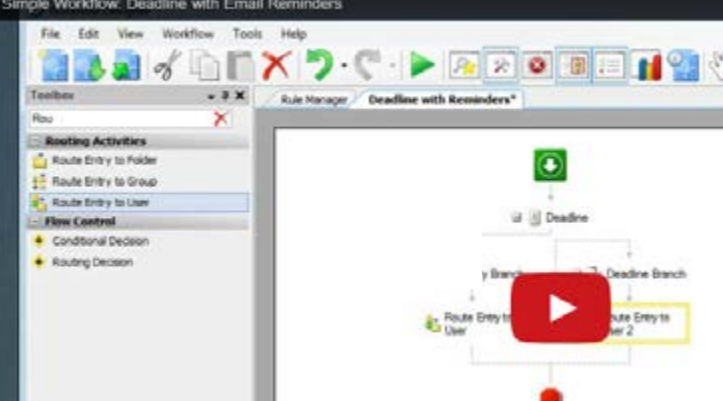
The Family Service department provides services such as food stamps to eligible people in the county. In order to be eligible for services, citizens must provide proof to the city, which in turn faxes it to the county. This is equivalent to some 290 pieces of paper faxed every day. In order to eliminate all the paper faxes, we integrated Laserfiche with Autostore.



Founded in 1757, Loudoun County, VA

Concrete examples of how other Laserfiche users have optimized their systems offer inspiration and step-by-step advice.

Simple Workflow: Deadline with Email Reminders



The screenshot shows the 'Rule Manager' interface for a workflow named 'Deadline with Reminders'. The workflow diagram includes a 'Deadline' node, which branches into 'y Branch' and 'Deadline Branch'. The 'y Branch' leads to 'Route Entry to User', and the 'Deadline Branch' leads to 'Route Entry to User 2'. A red play button is overlaid on the diagram.

Video tutorials provide hands-on instruction on how to use Laserfiche most effectively.

LaserficheAnswers

Q & A Topics Members Tutorial Feedback

From your questions and answers

Recent Updates

Topic	Replies	Views	Created	Updated
WebLink Log	3	109	April 7	5 minutes ago
Upgraded to 9.1 - User can press scan button, nothing happens.	2	2	70 minutes ago	5 minutes ago

Browse Topics

- Version 9 (593)
- Laserfiche (511)
- Workflow (240)
- Forms (333)
- Version 8 (150)
- Administration (140)
- Quick Fields (137)

A community of Laserfiche staff, users and resellers can be crowdsourced for Laserfiche best practices and innovative solutions.

The Tools to Drive Your Organization Forward

With a world-class community, extensive training options and more, **Laserfiche provides customers with more than just software**—it provides a comprehensive framework for delivering value quickly, easily and without the need to bring in expensive experts at every turn.

TRAINING

- ▶ Annual conference
- ▶ Certified Professional Program (CPP)
- ▶ Regional workshops
- ▶ Online support resources

KNOWLEDGE SHARING

- ▶ Solution Exchange
- ▶ Integration Marketplace
- ▶ Laserfiche Answers

COMMUNITY

- ▶ Case studies
- ▶ User groups
- ▶ Newsletters

Laserfiche is more than software; it's a community that's dedicated to helping organizations work smarter. Drive true organizational agility by leveraging everything Laserfiche has to offer.

Join the Laserfiche community

Want to learn more?
Explore Laserfiche Avante's functionality,
discover industry solutions and
get customer perspectives at:

laserfiche.com/avante



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About Laserfiche

Based in Long Beach, CA, with global headquarters in Hong Kong and offices in Shanghai, Toronto, Panama, London, Washington, D.C., and Fort Lauderdale, FL, Laserfiche uses its Run Smarter® philosophy to create simple and elegant enterprise content management (ECM) solutions. Since 1987, more than 34,000 organizations worldwide—including federal, state and local government agencies and Fortune 1000 companies—have used Laserfiche® software to streamline document, records and business process management.

The **Laserfiche ECM system** is designed to give organizations central control over their information infrastructure while still offering business units the flexibility to react quickly to changing conditions. The Laserfiche product line—which supports Microsoft® SQL and Oracle® platforms to leverage your existing technology investments—deploys rapidly, enhances efficiency and integrates seamlessly with the applications employees use every day.

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