



## Document Management

Laserfiche's desktop, web and mobile clients enable users to access and make changes to documents in the repository from any device.



## Laserfiche Document Management at a Glance

- Enable accessibility to documents and folders through a Web Content Accessibility Guidelines (WCAG) 2.0 compliant interface
- Instantly generate searchable text on scanned and electronic documents using optical character recognition (OCR) and full-text indexing
- Scroll through every document in the search results and view the context hits directly in the document
- Stream media files without needing to download them first
- Add custom action menu buttons across the entire installation
- Import documents by scanning, dragging and dropping them from a Windows drive, or download them from cloud-based services such as OneDrive and Google Drive
- Create custom import profiles to add a particular template, route new documents to the appropriate folder and name them according to a standardized naming convention

## Find Documents With One Click

- Open starred, currently in use, checked out and recently viewed documents through the quick access pane
- Run a quick search of all document text, fields, names and annotations either across the entire repository or within a single folder
- Use advanced search options to search by document creation date, the names of users who checked out documents and other metadata
- Find specific words or phrases within document text, metadata, annotations and entry names
- Perform routine searches in one click with custom quick searches that save search preferences

The screenshot displays the Laserfiche HR Manager interface. The top navigation bar includes 'Laserfiche', a search bar, 'Advanced' search options, 'Display Options', and 'HR Manager'. The main content area shows a folder structure on the left with 'Human Resources' expanded to '2015'. A table lists documents with columns for Name, Creation date, Last modified, Pages, and Te. The document 'Castrapel, Ben' is selected. A right-hand pane provides details for this document, including a Life Cycle timeline (Filing date, Employment Ended, Cutoff, Eligible for destruction), Details (Location, Status, Path, Permanent), and Cutoff Instruction (Name, Type, Cycle).

Name	Creation date	Last modified	Pages	Te
<input type="checkbox"/> Abernathy, Gale	2/5/2015 8:45 AM	6/8/2015 6:21 PM		
<input type="checkbox"/> Baron, Michelle	1/5/2015 9:30 AM	6/8/2015 6:21 PM		
<input checked="" type="checkbox"/> Castrapel, Ben	6/4/2012 7:15 AM	6/8/2015 6:28 PM		
<input type="checkbox"/> Chen, Laura	2/15/2014 9:00 AM	6/8/2015 6:22 PM		
<input type="checkbox"/> Cruz, Paulina	8/13/2014 7:00 AM	6/8/2015 6:22 PM		
<input type="checkbox"/> Franco, Victoria	7/22/2011 9:00 AM	6/8/2015 6:22 PM		
<input type="checkbox"/> Hernandez, Elias	3/28/2015 9:00 AM	6/8/2015 6:22 PM		
<input type="checkbox"/> Lee, Bethany	11/18/2009 8:00 AM	6/8/2015 6:22 PM		
<input type="checkbox"/> Steele, Alexis	5/22/2015 7:30 AM	6/8/2015 6:22 PM		
<input type="checkbox"/> Xiang, William	5/21/2012 8:30 AM	6/8/2015 6:22 PM		

**Life Cycle**

- 6/4/2012 Filing date
- 2/23/2015 Employment Ended
- 6/8/2015 Cutoff Eligible for cutoff 1/1/2015
- 1/1/2020 Eligible for destruction

**Details**

- Location: Current file area
- Status: Cutoff
- Path: Laserfiche\Human Resources\2015\Castrapel, Ben
- Permanent: No

**Cutoff Instruction**

- Name: End of Employment
- Type: Time-Event
- Cycle: CY (Calendar Yearly)

*Star favorite documents and folders to view them in the quick access pane.*

## Enable Collaboration

- Participate in business processes from anywhere by approving documents and viewing their approval history directly in the details pane
- Hold discussions, ask and answer questions, and create task lists directly on a document or folder
- Work with documents outside of Laserfiche by embedding a document or folder directly in an external application
- Track, display and compare document versions for easy review
- Sign and validate documents with VERS-certified digital signatures

The screenshot displays the Laserfiche interface. On the left, a sidebar shows a folder structure under 'Child Care Cases' with 30 entries selected. The main area shows a table of cases with columns for Name, Phase, Status, Urgency, and Assigned To. Case 888 is highlighted. On the right, the 'Case 888' details pane is open, showing a 'Discussions' tab with three messages from Deangelo Martin and Jared Rechnitz.

Name	Phase	Status	Urgency	Assigned To
Case 873	Closed	Closed	2	Ashley Davidson
Case 874	Family Progress	Good	4	Deangelo Martin
Case 875	Closed	Closed	1	Jane Starks
Case 876	Family Progress	Good	2	Josh Daniels
Case 877	Family Progress	Good	3	Russell Rueben
Case 878	Family Progress	Good	2	Deangelo Martin
Case 879	Family Progress	Good	3	Ashley Davidson
Case 880	Family Progress	Good	2	Jane Starks
Case 881	Family Progress	Attention	5	Josh Daniels
Case 882	Family Progress	Good	3	Ashley Davidson
Case 883	Case Assessment	Case Planning	2	Deangelo Martin
Case 884	Case Assessment	Case Planning	3	Russell Rueben
Case 885	Case Assessment	Case Planning	5	Jane Starks
Case 886	Case Assessment	Case Planning	2	Ashley Davidson
Case 887	Case Assessment	Case Planning	3	Russell Rueben
Case 888	Case Assessment	Case Planning	3	Josh Daniels
Case 889	Case Assessment	Case Planning	4	Jane Starks
Case 890	Case Assessment	Family Evaluation	2	Deangelo Martin
Case 891	Case Assessment	Initial Assessment		Jane Starks
Case 892	Case Assessment	Family Evaluation	4	Russell Rueben
Case 893	Case Assessment	Family Evaluation	3	Josh Daniels

**Case 888**

Fields Processes **Discussions**

Options Start a new subpost

Posted to Entire Social BPM site

**Deangelo Martin**

- Child Maltreatment Check
- Future Maltreatment?
- Immediate Safety Issues?
- Continuing Services Check
- Educate Reporter

Nov 20, 1:38 PM

Reply Press Enter to reply

**Deangelo Martin**

Reached out to Barrett Short to get some follow up information for this case. This case has no safety implications and the family is very loving. The issue here is regrading malnutrition as the family is not able to afford much in the way of food. Will be sending follow up information to the reporter shortly.

Nov 20, 1:32 PM

**Deangelo Martin**

Also of note, Adrienne's brother is in a school meal program that provides him with a meal before school and lunch. He should be monitored, but a new case does not need to be opened. Adrienne is not in school yet and does not have access to these free meals.

Nov 20, 1:34 PM

**Jared Rechnitz**

Hi Deangelo, saw these comments and will contact the family about food assistance programs our department offers. Let me know if you need anything else.

*Hold discussions around documents and folders.*

## Get Up and Running Immediately

- Access the repository from any computer, tablet or smartphone with a dynamic interface that adapts to any device
- Create reusable document fields that note key document information, like document author and approval time
- Automatically file documents on import
- Build standard document templates that can be applied to different documents or folders
- Connect related documents, like emails and their attachments, using document links
- View and modify a document or folder's templates, fields, tags and links directly from the unified metadata panel
- Easily duplicate existing filing structures
- Navigate and preview content with thumbnails of document pages



# Laserfiche<sup>®</sup>

## Run Smarter<sup>®</sup>

### About Laserfiche

Laserfiche Enterprise Content Management transforms how organizations manage information, automate document-driven business processes and make timely, informed decisions. Using Laserfiche, organizations can innovate how documents and unstructured information are processed and analyzed to achieve business results. Laserfiche provides intuitive solutions for capture, electronic forms, workflow, case management, cloud, mobile and government-certified records management. Since 1987, Laserfiche has been the trusted choice of more than 36,000 organizations worldwide.

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